UW OSHKOSH PURCHASE REQUISITION INSTRUCTIONS

**General Instructions for navigating within the form and submitting (Help features not in Apple systems):**

Tab or use mouse to navigate within form. Use mouse or spacebar to check applicable boxes & mouse in drop down list. Help in status bar or F1 key. Complete highlighted fields, remaining if applicable. Questions contact Purchasing at x0405. **Save completed form and send as an attachment with all supporting document attachments to** [**purchasing@uwosh.edu**.](mailto:purchasing@uwosh.edu)

Dept Requisition #: The requisition # as determined by the department. It may be any combination of letters/numbers - up to 12 characters. Departments may continue to use previous RX & numbering if desired. This number is included on the purchase order (PO).

Date: The date requisition is submitted to purchasing. NOTE: If submitting a requisition for the next fiscal year in May or June, enter the date as July 2 of the new fiscal year.

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| Submitted by: | Phone: | Email: |
| The person submitting the purchase requisition and their UWO phone/extension number & email address. They will be emailed a copy of the PO & copies of any invoices received in the Financial Services office. The submitter’s information will be included on the PO and  they will be listed as the ‘UWO Contact’ if a different Contact is not indicated below. | | |

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| Requested for | If applicable check appropriate box(es) using mouse or space bar and enter: |  |  |
| Dept Contact | Phone: | Email: |
| The person that requested the purchase or who it is for and/or the UWO staff the vendor should contact and their phone number & email address. The Contact person's information will be listed on the PO as the ‘UWO Contact’. | | | |

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| Vendor ID#: | Enter the Vendor ID# found in WISDM. | Vendor Phone: |
| If vendor is new submit a W-9 form with requisition. Blank W-9 forms are available at [www.irs.gov](http://www.irs.gov/) or contact the Purchasing Dept. | | The Vendor's main office phone # is preferred, but a salesman/contact's number may be used. |
| Vendor Name: | | Order Fax: |
| The legal name of the vendor that the PO should be made out to. | | The Vendor's Fax # that would be used if submitting the PO by fax. |
| Address: |  | Order Email: |
| The vendor's address that should show on the PO if it is sent by US Postal Service.  The address is not required for HP or Apple ‘computer’ orders. | | An email address for submitting orders to the Vendor – can be a general order or salesman’s email. **Emailing is the preferred method of submitting POs to the Vendor.** |
| Quote By: |
| Name of contact person that provided quote submitted with  requisition. |

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| IT Help Desk Tkt #: | Quote #: | Contract #: |
| Enter the IT Help Desk Ticket #. Required for purchases relating to computer hardware, software & copiers | Enter the quote # on the attached quote purchase applies to. NOTE: If quote date is not within 30 days of request, expiration days or date must be indicated or an updated quote requested. | Enter the WI State, UW System, UW Madison, or other contract # the purchase applies to.  **Contract # required if over $5,000 purchase or 3 quotes must be submitted.** |

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| **Fund** | Account | Fund | Department | Program | Project | Amount |  | Freight (FOB) Terms |
| **1** |  | 102 |  | 0 |  | 0.00 | Destination |
| **2** |  | 102 |  | 0 |  | 0.00 | Destination + |
| **3** |  | 102 |  | 0 |  | 0.00 | Shipping Point |
| **4** |  | 102 |  | 0 |  | 0.00 | Pick up |
| This **Total** should equal the **Ext Total** column below: | | | | **Total** |  | **$0.00** | Other |

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| IN COLUMN: | COMPLETE A LINE FOR EACH FUNDING STRING: |  | SELECT APPROPRIATE TERMS (with mouse or space bar): |
| **Account** | Enter 4-digit expense account #. Common accounts are: 3100 Supplies, 3194 Computers & Acces,  2460 Computer Maint, 3195 Equipment,  2480 Equipment Maint, 2620 Prof Services | **Destination**: These are the preferred freight terms - Vendor retains ownership of items until we receive them and pays all shipping charges. Vendor is responsible for  any shipping claims. |
| **Fund** | Select Fund number from drop down list with mouse.  Fund options:  102,104,128,131,132,133,136,144,145,150,402 | **Destination +**: Vendor retains ownership of items until we receive them, but shipping charges will be added to  invoice. Vendor responsible for any shipping claims. |
| **Department** | Enter 6-digit Department # to be charged. | **Shipping Point**: UWO assumes ownership when item is shipped, shipping charges may be paid by vendor or added to invoice. We are responsible for any shipping claims.  AKA: FOB Origin |
| **Program** | Select Program Code from drop down list with mouse.  Program Code options: 0,1,2,4,5,6,7,8,9 | **Pick up**: Purchase will be picked up by UWO staff. UWO  assumes ownership and responsibility upon pickup. |
| **Amount** | Enter total amount to be charged to this expense  account and department fund account. | **Other**: None of above, i.e. installed |

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| Ordering/’Ship To’ Dept: | Building: | Room #: |
| Enter the name of department requesting the  order and/or should be delivered to. | Enter the building name the 'Ship  to' department is located in. | Enter the Room # that the 'Ship to' department's  mail and deliveries are made to. |

COMMENTS: Enter any additional information or instructions that might be needed - shipping notes, additional contacts, send PO copy to add'l person, etc.

**For annual recurring POs, list prior year's PO# here.**

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| Line | Qty | Unit | Description & Item Number | Unit Price | Ext Total | **Fund #** |
| 1 |  |  |  |  | 0.00 |  |
| 2 |  |  |  |  | 0.00 |  |
| This **Total** should equal the **Total** in the **Fund** section: | | | | **Total** | **$0.00** |  |

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| IN COLUMN: | COMPLETE A LINE FOR EACH DIFFERENT ITEM WITH THE FOLLOWING: |
| **Qty** | Quantity of item being purchased according to its Unit of Measure |
| **Unit** | Enter Standard Unit of Measure of item being purchased. Commonly used: EA-each, YR-year, M-1,000 |
| **Description &**  **Item Number** | Enter the primary description of the item/service being purchased.  Additional detail can be entered in Comments section or in unused lines below.  NOTE: Internal part #s on computer quotes do not need to be listed, only the main item is needed. |
| **Unit Price** | Enter Unit Price based on quantity entered.  **Ext Total** column will automatically calculate Qty entered x Unit Price. |
| **Fund #** | If more than 1 fund account is being used and multiple items are being purchased, indicate which fund line(s) 1, 2, 3, or 4 applies to each item. |

Vice Chancellor Approval

(If $5,000 or greater) The Vice Chancellor of the respective area needs to approve the Requisition if the total is at or greater than $5,000