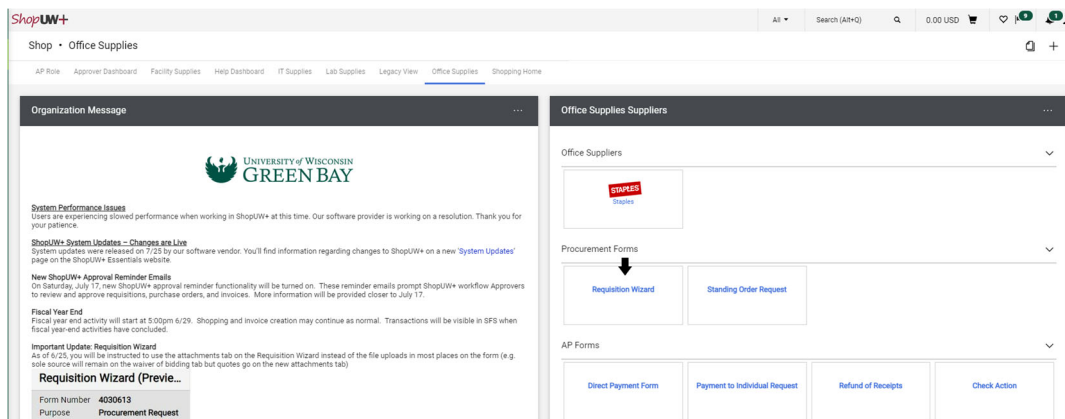


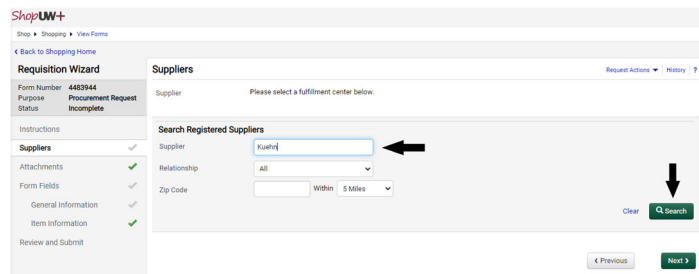
## Requisition Wizard (Purchase Orders)

The Requisition Wizard is used for goods purchased with a total over \$5,000 that are not on state contract and all services. For goods purchased totaling less than \$5,000, or goods purchased for state contract items, use the Non-Catalog item add. If you are unsure which process to follow, use the requisition wizard. For multiple regular payments over a period of time, use the Standing Order Request.

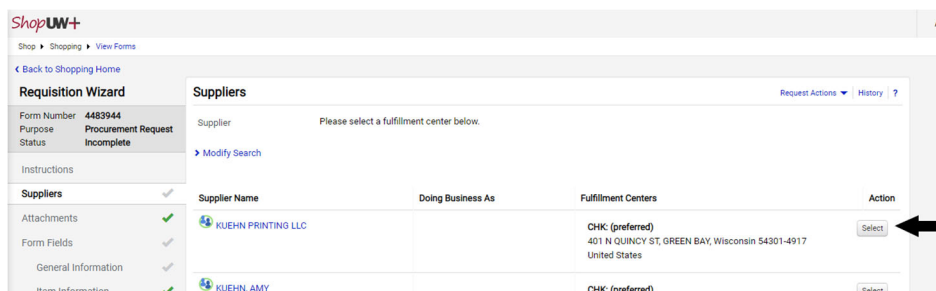
1. From the Home Page, click on the **Requisition Wizard** under Procurement Forms.



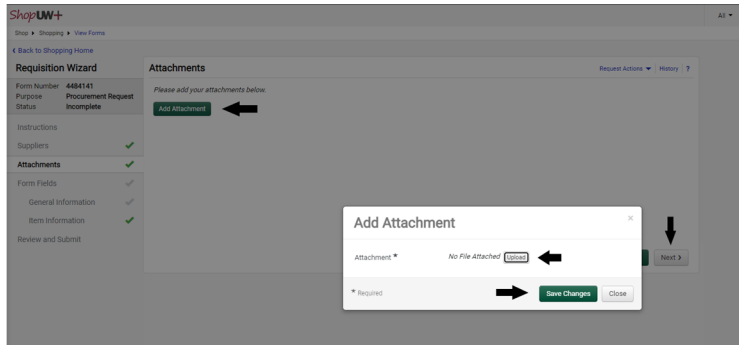
2. Click **Next** on the Instructions page
3. Enter the Supplier's name. For individuals use the last name. Click **Search**.



4. If multiple options click **Select** for the correct supplier from the list. Click **Next**.
  - a. If the supplier does not appear, send a W9 via Liquidfiles (<https://liquidfiles.uwgb.edu/filedrop/alexandd@uwgb.edu>) to Danielle Alexander or intercampus mail to Purchasing. Supplier set up takes up to a week. **Do not email W9s or attach to ShopUW+.**



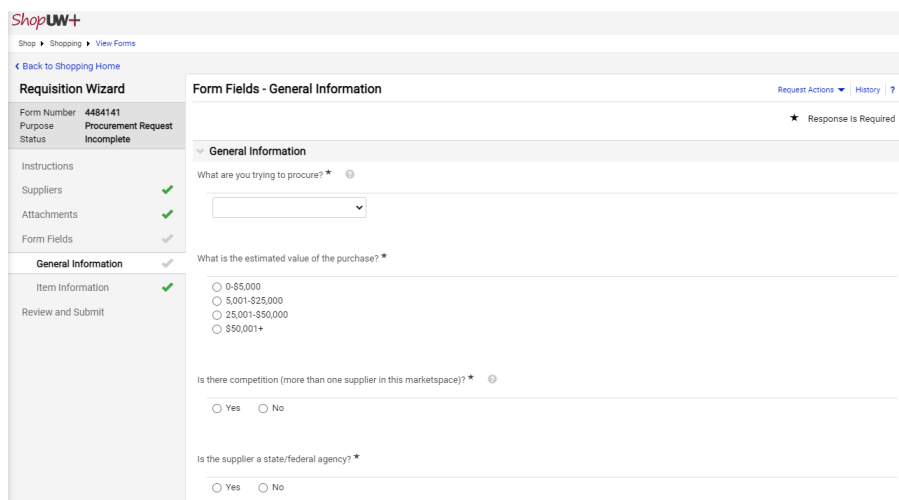
5. Attachments – Attach back up for the Requisition/PO as PDFs. Examples: quotes, service agreements, or invoices if available. **Do not attach a W9.** Click **Next**.



The screenshot shows the 'ShopUW+' interface. On the left is a 'Requisition Wizard' sidebar with a progress indicator for 'Attachments'. The main area is titled 'Attachments' and contains a message: 'Please add your attachments below.' Below this message is a green 'Add Attachment' button with a left-pointing arrow. A modal window titled 'Add Attachment' is open in the foreground, showing a text input field with the placeholder 'Attachment \*' and the text 'No File Attached' next to it. Below the input field are radio buttons for 'Required' and 'Optional', and buttons for 'Save Changes' and 'Close'. A 'Next >' button is visible in the background on the right side of the main area.

6. Click **Next** on the **Form Fields Page**.

## Form Fields – General Information Page



The screenshot shows the 'ShopUW+' interface for the 'Form Fields - General Information' page. The left sidebar shows the 'Requisition Wizard' with a progress indicator for 'Form Fields'. The main area is titled 'Form Fields - General Information' and contains several sections:
 

- General Information** (expanded):
  - 'What are you trying to procure? \*': A dropdown menu.
  - 'What is the estimated value of the purchase? \*': Radio buttons for '0-\$5,000', '5,001-\$25,000', '25,001-\$50,000', and '\$50,001+'.
  - 'Is there competition (more than one supplier in this marketplace)? \*': Radio buttons for 'Yes' and 'No'.
  - 'Is the supplier a state/federal agency? \*': Radio buttons for 'Yes' and 'No'.

 A star icon and the text 'Response is Required' are visible in the top right corner of the main area.

- A. What are you trying to procure? – Select either **Purchasing Good** or **Purchasing Service**. A good is a physical item. Nonphysical items are a service. Ex. A speaker presentation is a service whereas lab equipment is a good. Note: A software purchase would be considered a good, a software renewal would be a service.
- B. What is the estimated value of the purchase? – Choose value.
- C. Is there competition (more than one supplier in this marketplace)? – Click yes if any competition exists, click no if the item/service can only be provided by one specific supplier. Examples: There are several catering options in town, even though only Chartwells is allowed on campus, the answer is yes. A speaker might be the only one to provide that particular speech, but if other speakers provide a similar topic, the answer would be yes.
- If the item/service is on a state contact then select yes.
  - The answer is no if:
    - The features/abilities of this good/service are unmatched and superior to other similar products/services

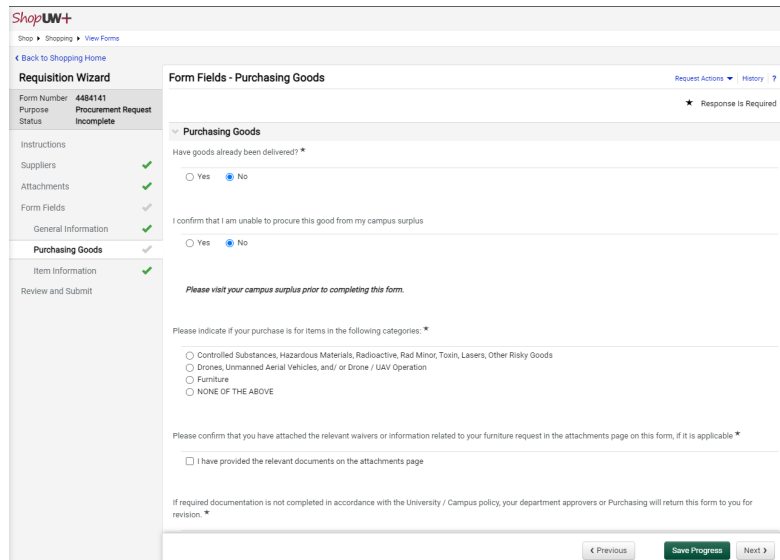


- ii. This good/service is only available from one supplier and no other similar items are available.
  - iii. A grant award requires the purchase of a particular brand name good/service.
  - iv. When a product has historic, artistic, or educational value, and/or viable specifications or standards cannot be determined.
- c. If the answer is no, go to <https://www.uwgb.edu/purchasing/forms/> and click on **Request for Single/Sole Source Purchase** fill out the form and **email to [purchasing@uwgb.edu](mailto:purchasing@uwgb.edu)** prior to continuing the requisition. Attach the PDF of the approved waiver to the Waiver of Bidding section.
- D. Is the supplier a state/federal agency? – Select yes if they are a state or federal department. Example: another UW campus, Wisconsin Department of Administration. Private sector companies that have contracts with the state are not state agencies.
- E. Do these goods or services require a payment at time of order placement (a prepayment, deposit, or cash with order)? – No is the most common answer, if yes email [accountspayable@uwgb.edu](mailto:accountspayable@uwgb.edu) prior to submission with the amount of the prepayment and date requested. Prepayments should be submitted no later than one week in advance. Select Yes for checks due the date of service.
- F. If this supplier is on contract, please provide the contract number: Optional, if known enter state contract number.
- G. Read the statement and check box for **I have provided the relevant documents or no documentation is required.**
- H. Click **Next**.

**Click Here for Purchasing Services Instructions**

**Click Here for Purchasing Goods Instructions**

## Form Fields – Purchasing Goods



The screenshot shows the 'Form Fields - Purchasing Goods' section of the ShopUW+ Requisition Wizard. The form includes a sidebar with a progress indicator for 'Purchasing Goods' and a main content area with the following fields:

- Have goods already been delivered? \***  
 Yes  No
- I confirm that I am unable to procure this good from my campus surplus**  
 Yes  No
- Please visit your campus surplus prior to completing this form.**
- Please indicate if your purchase is for items in the following categories: \***  
 Controlled Substances, Hazardous Materials, Radioactive, Rad Minot, Toxin, Lasers, Other Risky Goods  
 Drones, Unmanned Aerial Vehicles, and/or Drone / UAV Operation  
 Furniture  
 NONE OF THE ABOVE
- Please confirm that you have attached the relevant waivers or information related to your furniture request in the attachments page on this form, if it is applicable \***  
 I have provided the relevant documents on the attachments page
- If required documentation is not completed in accordance with the University / Campus policy, your department approvers or Purchasing will return this form to you for revision. \*

Navigation buttons at the bottom include 'Previous', 'Save Progress', and 'Next'.

- Have goods already been delivered? – Select **No**. Our campus does not use the Non-Conforming Purchase Documentation Form.
- I confirm that I am unable to procure this good from my campus surplus – Select **Yes** or **No**. Often surplus has many supplies, especially office supplies like paperclips.
- Please indicate if your purchase is for items in the following categories – Select proper category and carefully read the next section.
- Please confirm that you have attached the relevant waivers or information related to your furniture request in the attachments page on this form, if it is applicable - Check box for **I have provided the relevant documents on the attachments page**.
- Read the statement and check box for **I confirm I have read & understood the university & campus policy relevant to my purchase and have attached the required documentation below**.
- Click **Next**.

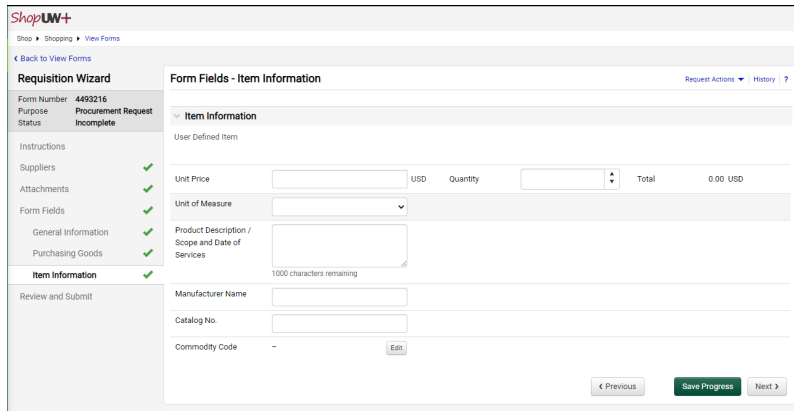
[Click Here for Item Information Page Instructions](#)

[Click Here for Waiver of Bidding Page Instructions](#)

[Click Here for Pre-payment Page Instructions](#)

## Form Fields – Item Information

Note: This page allows for one item to be added. Additional items can be added on the Shopping Cart page. Instructions for additional items to follow.

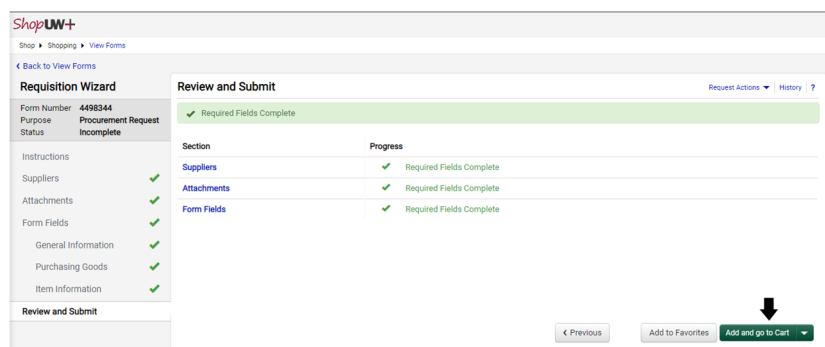


- A. Unit Price – Enter the price of the item.
  - a. If it will be invoiced as one order, you can enter the total of the order.
- B. Quantity – Enter the quantity of items purchased. If using lot unit of measure, enter 1.
- C. Unit of Measure – Select appropriate unit. Most common: each for individual items, or lot for an order total.
- D. Product Description / Scope and Date of Services – First 30 Characters will appear in WISER. Enter a clear description that closely matches the quote/invoice. This will speed the payment process and help answer potential questions Accounts Payable may have.
- E. Manufacturer Name – Optional
- F. Catalog No. – Optional
- G. Commodity Code – Click **Edit**. Select the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.
- H. Click **Next**.

## Review and Submit

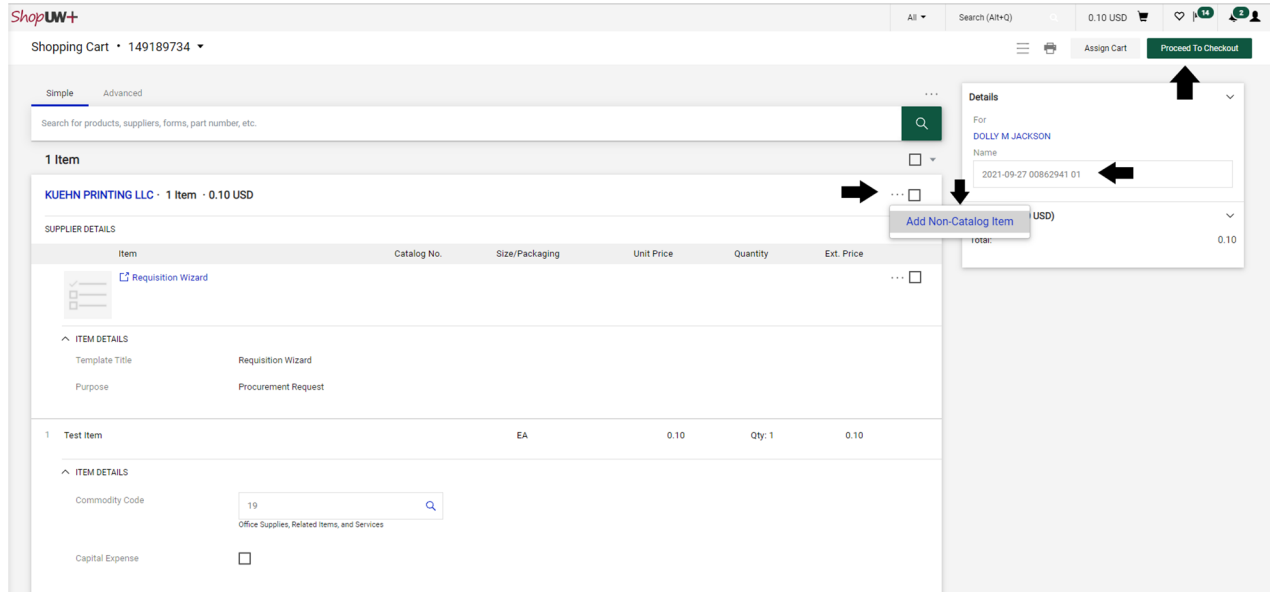
Click **Add and go to Cart**.

Note: See Saving a Form as a Template for instructions on saving a Requisition Wizard for use for similar purchases in the future to save time.

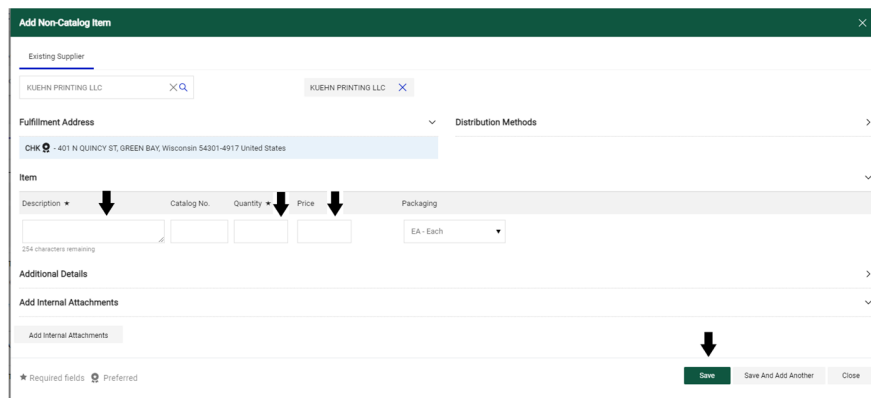


## Shopping Cart

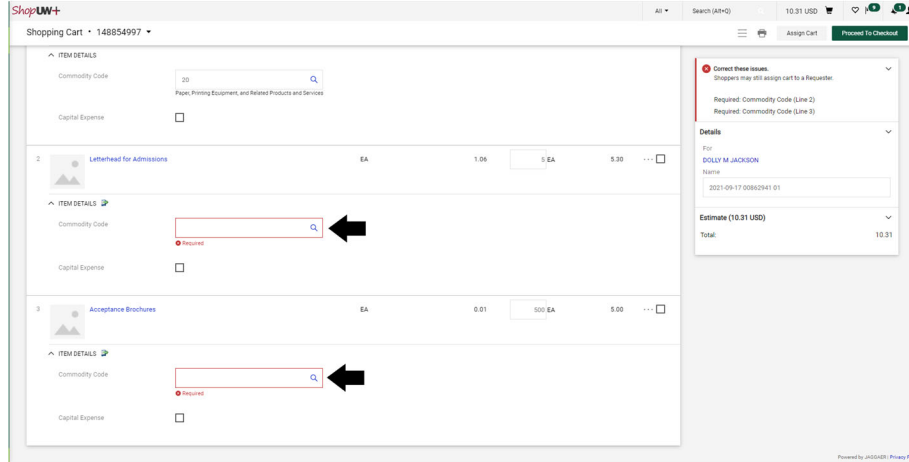
1. Enter a short description in the **Name** section. Entering a name here will help you decipher between POs for the same vendor later and overall reduce searching time.



2. If you have additional items to add, click the **Three dots** to the right of the Supplier name.
3. Click **Add Non-Catalog Item**.
  - a. If you do not have additional items to add, skip to number **10**.



4. Description – First 30 Characters will appear in WISER. Enter a clear description that closely matches the quote/invoice. This will speed the payment process and help answer potential questions Accounts Payable may have.
5. Quantity – Enter the quantity of items purchased. If using lot unit of measure, enter 1.
6. Unit Price – Enter the price of the item.
7. Packaging – Select appropriate unit of measure. Most common: each for individual items, or lot for an order total.
8. If you have additional items to add, click **Save And Add Another**. Repeat steps 3-6.
9. Once you have entered all the items, click **Save**.

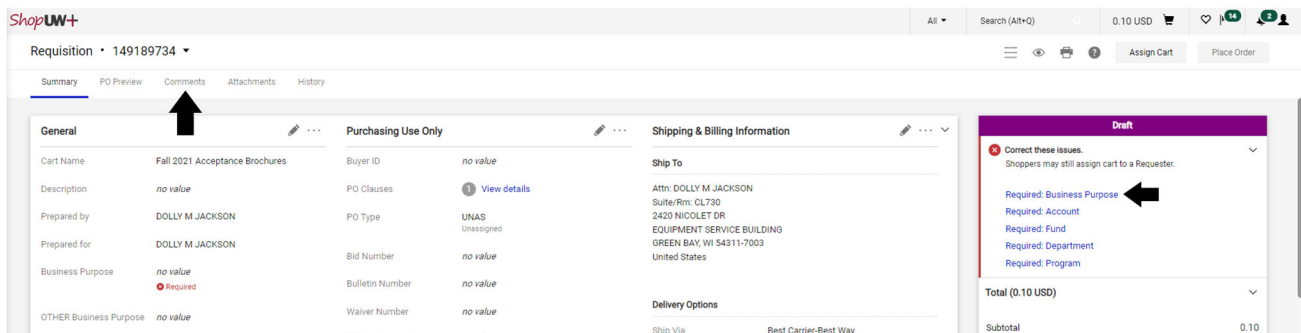


10. Enter the Commodity Code for added items – Click **Magnifying Glass**. Select the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.
11. Click **Proceed to Checkout**.

## Requisition

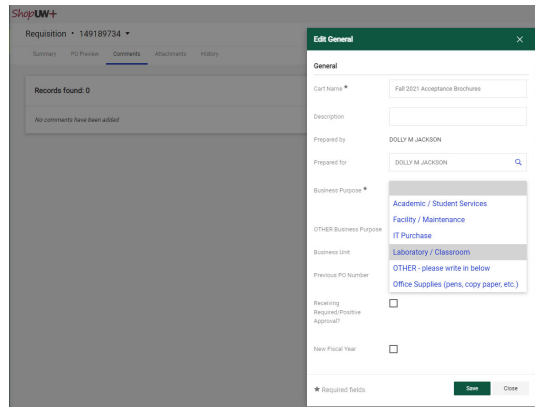
The Requisition page is where comments can be added to Purchasing, the business purpose and the funding string are entered and the final submission is done.

1. Click **Comments** tab
2. Click the **Plus Sign** to add a comment. If the PO is to be sent via email, add the supplier email address of where to send the PO. Add any notes Purchasing might need. This is optional.



3. Click **Required: Business Purpose**

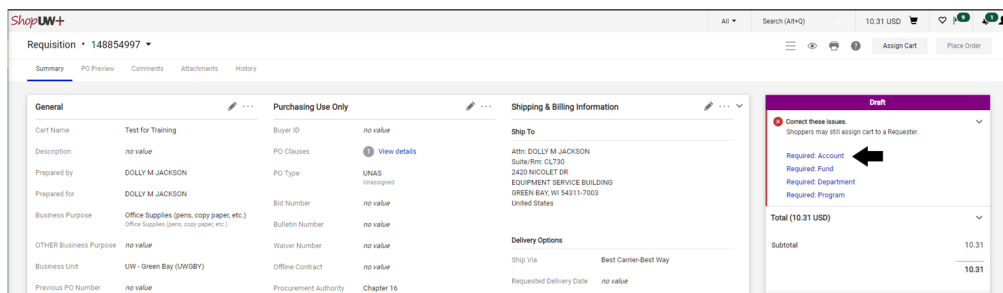
4. Select the appropriate category from the **Drop Down**



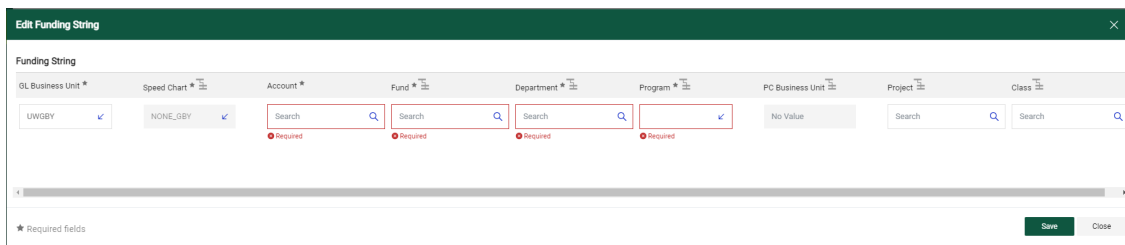
5. Click **Save**.

**Click Here for Multiple Funding Code Instructions**

**Single funding code entry**



6. Click **Required: Account**.



7. GL Business Unit – **Select UWGBY**
8. Speed Chart – Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.
9. Account – 4-digit account number. Go to <https://www.uwgb.edu/purchasing/shopuw/> and click on **Common Account Codes** for a list of common codes.
10. Fund – 3-digit number from your funding string
11. Department – 6-digit number. **All department numbers must be in format XXXXXX\_GBY.** You must add the \_GBY to the department number. Use the Magnifying Glass to select the department.
12. Program – 1-digit number.

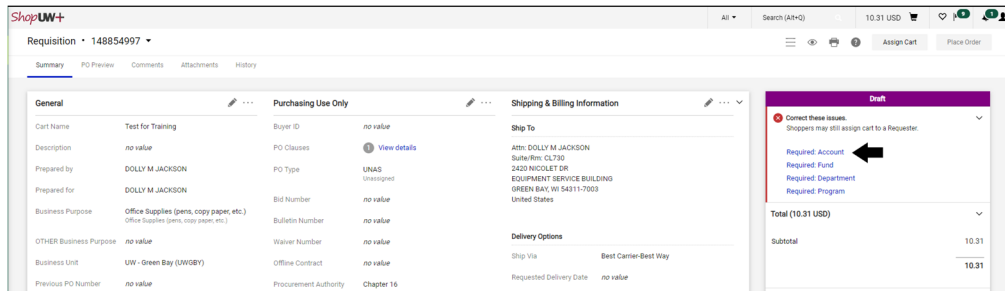




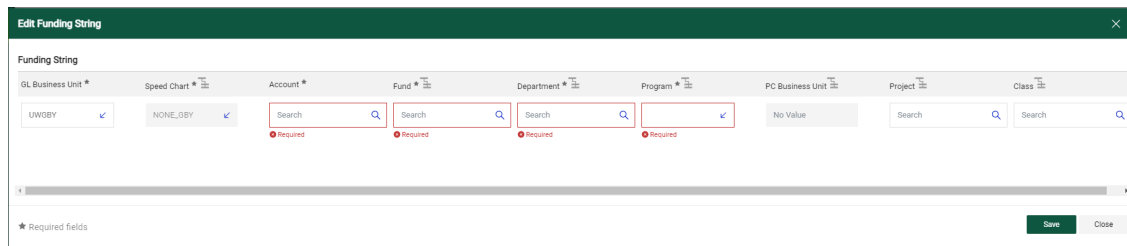
UNIVERSITY of WISCONSIN  
GREEN BAY

13. Project – Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXXXX\_GBY.** You must add the \_GBY to the project number. Use the Magnifying Glass to select the project.
14. Class – Only used by Athletics.
15. Click **Save**
16. Click **Place Order**
17. When invoices are received, email the invoice and any backup as a PDFs to [Accountspayable@uwgb.edu](mailto:Accountspayable@uwgb.edu) and include the Requisition number or PO number. **Payments will not be processed if the invoice is not emailed to Accounts Payable.**

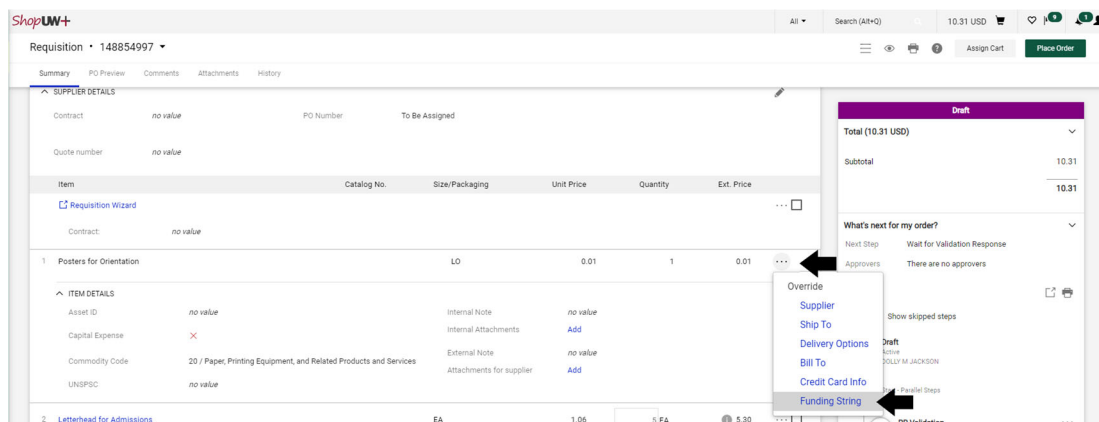
## Multiple Funding Code Entry



1. Click **Required: Account**.



2. GL Business Unit – UWGBY
3. Speed Chart – Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.
4. Account – 4-digit account number. Go to <https://www.uwgb.edu/purchasing/shopuw/> and click on **Common Account Codes** for a list of common codes.
5. Fund – 3-digit number from your funding string
6. Department – 6-digit number. **All department numbers must be in format XXXXXX\_GBY.** You must add the \_GBY to the department number. Use the Magnifying Glass to select the department.
7. Program – 1-digit number.
8. Project – Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXXXX\_GBY.** You must add the \_GBY to the project number. Use the Magnifying Glass to select the project.
9. Class – Only used by Athletics.
10. Click **Save**
11. Scroll down to the item that has a different funding code from the one entered above.
12. Click on the **Three Dots** on the right of the price for that line





13. Click **Funding String** in the Override menu.
14. Click on the Account/Fund/Department/Program or Project to change
15. Change the funding to the new funding string.

A screenshot of a software dialog box titled "Override Line 1: Funding String". The dialog has a dark green header and a light gray body. It contains several input fields for selecting funding information: "GL Business Unit" (with "UWGBY" selected), "Speed Chart" (with "NONE\_OBY" selected), "Account" (with "2620" entered), "Fund" (with "131" entered), "Department" (with "400316\_OBY" entered), "Program" (with "1" selected), "PC Business Unit" (with "No Value" selected), "Project" (with a search box), and "Class" (with a search box). There are search icons next to the Account, Fund, Department, Project, and Class fields. At the bottom right, there are "Save" and "Close" buttons. A legend at the bottom left indicates that an asterisk (\*) denotes required fields.

16. Click **Save**.
17. Repeat for any additional item lines that need new funding entered.
18. Click **Place Order**
19. When invoices are received, email the invoice and any backup as a PDFs to [Accountspayable@uwgb.edu](mailto:Accountspayable@uwgb.edu) and include the Requisition number or PO number. **Payments will not be processed if the invoice is not emailed to Accounts Payable.**



## Form Fields – Purchasing Services

The screenshot shows the 'Form Fields - Purchasing Services' section of the ShopUW+ Requisition Wizard. The left sidebar shows the progress of the wizard, with 'Purchasing Services' currently selected. The main content area contains several questions with radio button options for 'Yes' and 'No'. The questions are: 'Have services already begun?', 'Can the service be provided by an on-campus department?', and 'Will the service provider have access to student information, Protected Health Information, or data classified as high or medium risk according to University policies?'. Below these are checkboxes for 'In your requested service any of the following?'. The form also includes a footer with a disclaimer and a 'Next' button.

- A. Have services already been begun? – Select **No**. Our campus does not use the Non-Conforming Purchase Documentation Form.
- B. Can the service be provided by an on-campus department? – Select **Yes** or **No**.
  - a. Chartwells does not count as a on campus department.
  - b. If yes, explain why the campus was not used.
- C. Will the Service provider have access to student information, Protected Health Information, or data classified as high or medium risk according to University policies? Select **Yes** or **No**.
  - a. If yes, Read the statement and check box for **I have provided the relevant documents or no documentation is required**.
- D. Is your requested service any of the following? – Select the appropriate category and carefully read the following statement.
- E. Is this supplier an individual or sole proprietor? Select **Yes** or **No**. If No, skip to H.
- F. Is this person a current or former employee of the UW System? – Select **No**. Currently employees, or previous employees that were employed during the current fiscal year, of any UW System Campus must be paid through HR. Purchasing/Controller’s Office will inform you at the time of supplier set up if they are a current or former employee.
- G. Go to <https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/utilization-of-independent-contractors/#policy> and scroll down to number 7. Related Documents and click **SYS 236 Appendix 1**. Fill out the form but **leave the social security number blank**. Attach the PDF of the form to the attachments page. If the form states to treat the supplier like an employee, payment must go through HR and can not be processed through ShopUW+.
- H. Click **Next**.

**Click Here for Item Information Page Instructions**

**Click Here for Waiver of Bidding Page Instructions**

**Click Here for Pre-payment Page Instructions**

**Click Here for Instructional, Research or Other Academic Services Page Instructions**



## Form Fields – Waiver of Bidding

If you selected that there is no competition on the General Information page, you will get the Waiver of Bidding screen after the Purchasing Goods screen. Prior to completing the Requisition Wizard, contact Purchasing for the proper waivers and approval.

Note: if your purchase is under \$5,000, no waivers are needed. Read the page and click Next.

- A. Read the statement and check box for **I have read and confirm the above**.
- B. What type of exemption are you requesting?
  - a. Single Source – The features/abilities of this good/service is unmatched and superior to other similar products/services
  - b. Sole Source Request – This good/service is only available from one supplier and no other similar items are available.
  - c. Grant Exemption – A grant award requires the purchase of the brand name good/service.
  - d. Payment to Other Wisconsin State Agency or Utilities – The supplier is a WI State Agency (ex. Department of Admin, another UW Campus) or utility
  - e. Intrinsic Value – When a product has historic, artistic, or educational value, and/or viable specifications or standards cannot be determined.
  - f. Emergency (Public Health, Safety, or Welfare) – When the risk of human suffering or substantial damage to state real or personal property exists that requires immediate action - contact your campus Purchasing office immediately, prior to continuing with this requisition
  - g. Substantial Time Pressure – Note that time pressure must be beyond your control and does not include administrative delays or confusions in the purchasing process.
- C. Prior to completion of this requisition, **contact Purchasing for waiver approval**.
- D. Fill out the remaining questions. Use the description from the waiver approved by Purchasing.
- E. Attach the PDF of the waiver signed by the Purchasing director.
- F. Click **Next**.

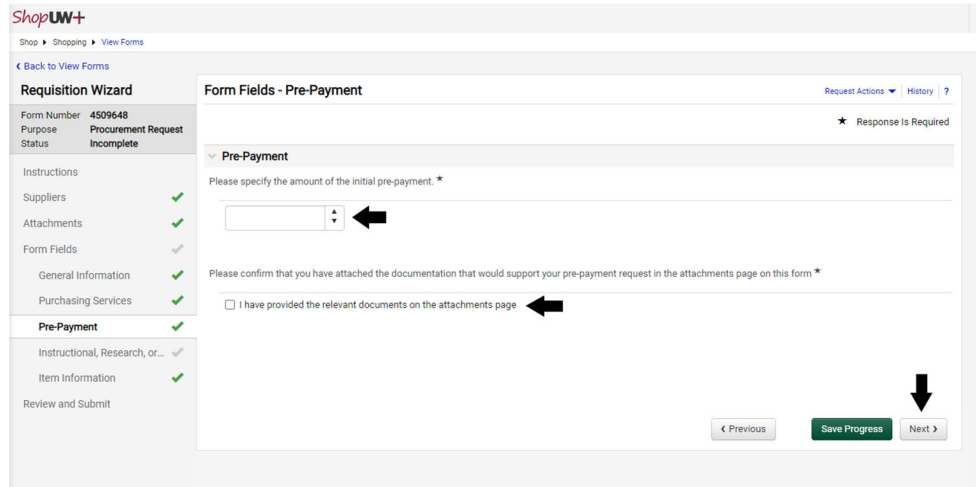
[Click Here for Item Information Page Instructions](#)

[Click Here for Pre-payment Page Instructions](#)

[Click Here for Instructional, Research or Other Academic Services Page Instructions](#)

## Form Fields – Prepayment

Note: You must email [Accountspayable@uwgb.edu](mailto:Accountspayable@uwgb.edu) with the requisition number, amount, and date pre-payment is due.



ShopUW+  
Shop > Shopping > View Forms  
Back to View Forms

**Requisition Wizard**

Form Number	4509648
Purpose	Procurement Request
Status	Incomplete

Instructions  
Suppliers ✓  
Attachments ✓  
Form Fields ✓  
General Information ✓  
Purchasing Services ✓  
**Pre-Payment** ✓  
Instructional, Research, or... ✓  
Item Information ✓  
Review and Submit

**Form Fields - Pre-Payment** Request Actions History ?

★ Response Is Required

**Pre-Payment**

Please specify the amount of the initial pre-payment. \*

Please confirm that you have attached the documentation that would support your pre-payment request in the attachments page on this form \*

I have provided the relevant documents on the attachments page

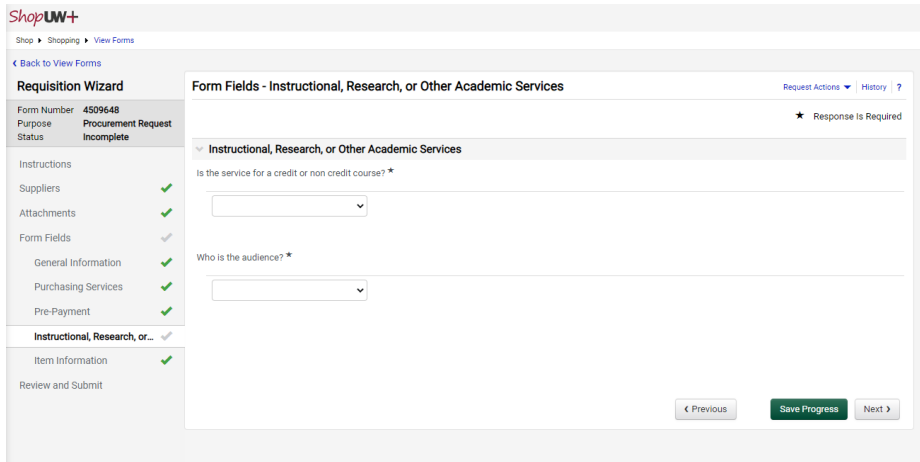
Previous Save Progress Next

- Please specify the amount of the initial pre-payment. – This is the amount of the pre-payment needed. Payments for services due at the time of service/event should be entered for the full amount.
- Please confirm that you have attached the documentation that would support your pre-payment request in the attachments page on this form - Check box for **I have provided the relevant documents on the attachments page**.
- Click **Next**.

[Click Here for Item Information Page Instructions](#)

[Click Here for Instructional, Research or Other Academic Services Page Instructions](#)

## Form Fields – Instructional, Research, or Other Academic Services.



The screenshot shows the 'Form Fields - Instructional, Research, or Other Academic Services' page in the ShopUW+ system. On the left is a 'Requisition Wizard' sidebar with a progress indicator. The main area contains two questions with dropdown menus. The first question is 'Is the service for a credit or non credit course? \*' and the second is 'Who is the audience? \*'. At the bottom right are 'Previous', 'Save Progress', and 'Next' buttons.

ShopUW+  
Stop Shopping View Forms  
Back to View Forms

**Requisition Wizard**

Form Number 4509648  
Purpose Procurement Request  
Status Incomplete

Instructions  
Suppliers ✓  
Attachments ✓  
Form Fields ✓  
General Information ✓  
Purchasing Services ✓  
Pre-Payment ✓  
Instructional, Research, or... ✓  
Item Information ✓  
Review and Submit

Form Fields - Instructional, Research, or Other Academic Services Request Actions History ?

★ Response is Required

Instructional, Research, or Other Academic Services

Is the service for a credit or non credit course? \*

Who is the audience? \*

Previous Save Progress Next

- I. Is the service for a credit or non-credit course? Select **Credit, Non Credit, or Does Not Apply.**
- J. Who is the audience? Select **Staff, Faculty, Students, or None of the above.**
- K. Carefully read the statement and check any boxes if necessary.
- L. Click **Next.**

[Click Here for Item Information Page Instructions](#)