ShopUW Definitions

Approver – The person who reviews and approves purchases/requisitions and invoices/AP forms. There are three levels of approvers in ShopUW+

Catalog Item – An item available for purchase on ShopUW+ through the punch out catalogs. Examples include pens and pencils through Staples. These are ordered directly from the supplier through ShopUW+. Items must be purchased through the Catalog if possible.

Direct Payment (DP) Form – Form used to submit payments for Credit Card Payments, Utilities, Real Estate Taxes, ect. Only used by Controller's Office and a few departments. Contact Accounts Payable prior to use to ensure proper form is used.

Invoice – Invoices are paid against Purchase Orders by Accounts Payable with exception of Direct Payment (DP) Forms and Payments to Individual Reports (PIR). Invoice copies must be sent to accountspayable@uwgb.edu with Purchase Order or Requisition numbers.

Low Dollar/Best Jdgmt Review – An approval step in ShopUW+ for low dollar requisitions or purchase orders. Purchasing department is the approver for this step.

Non Catalog Item – An item purchased from a vendor other than the ones found on ShopUW+'s catalog. Ex. Chartwells, Kuehn Printing, ect

Non Catalog Item Add – A form filled out by the Requestor or Shopper for goods purchased totaling less than $5,000, or goods purchased for state contract items. Also used for Chartwells. If you are unsure which process to follow, use the requisition wizard. This form put items into a Shopping Cart, which then turns into a Requisition, then a Purchase Order.

Payment to Individual Request (PIR) – Payment to Individual Request form. PIRs can only be used for individuals in the following circumstances; one-time services of $500 or less, athletics officials, prizes/awards, research subjects, test proctors. Once submitted it turns into an invoice, which Accounts Payable reviews and approves for payment.

Punchout – This is the name of the program we use for catalog ordering. Once an order is submitted through Punchout, it is added to your Shopping Cart, then it turns into a Requisition, then a Purchase Order.

Purchase Order – Purchase Orders are created automatically from approved Requisitions. Purchase Orders are required prior to the payment of an invoice, with exception of Direct Payment (DP) Forms and Payments to Individual Reports (PIR).

Refund of Receipts (ROR) – This form is used to submit for refunds to be paid by the University to a person/company for a service not rendered. Examples include: refund of KRESS membership due to COVID. Refund of conference fees paid to the University when the individual cancels prior to the conference.

Requestor – A person who can submit catalog items or forms in ShopUW+. Usually the administrative person for the area.

Requisition – All Shopping carts become a requisition. On this page you can add funding codes and comments prior to submission. Once submitted and approved, it turns into a Purchase Order.

Requisition Wizard – A form filled out by the Requestor or Shopper for goods purchased with a total over $5,000 that are not on state contract and all services. If you are unsure which process to follow, use the requisition wizard. This form turns into a Shopping Cart, then a Requisition, then a Purchase Order.

Shopper – A person who can send catalog items or shopping carts with Requisition Wizard or Non-Catalog Item Adds to a Requestor for submission. All employees have this role.

Shopping Cart – Where all items go before being submitted. Located in the upper right of the ShopUW+ screen. Once submitted it turns into a Requisition, then a Purchase Order.

Standing Order – A purchase order for multiple (over 5) payments over a period of time. Previously called a Blanket PO. This is for monthly payments as well as payments over a shorter period of time (typically 2 months or more).

Standing Order Request – A form filled out by the Requestor or Shopper for goods or services with multiple delivery and payment dates over a period of 2 or more months. If you are unsure which process to follow, use the requisition wizard. This form turns into a Shopping Cart, then a Requisition, then a Purchase Order.

Supplier – The company which the goods or services is being purchased from. Also called Vendor.