



Helpful Hints and Tips

Add AP Form to Favorites *(Requester)*

Save PIR and DP forms as a template by adding to your favorites

Instructions on page 3-5

Receiving Required *(Shopper/Requester)*

Receiving required needs to be checked on a requisition for a **service** and for **food catering**

Instructions on page 6-7

The PO line item can be received when the service is completed and the amount is confirmed, you do not have to necessarily wait until an invoice is received

Requisition Line Description *(Shopper/Requester)*

Make sure to include a detailed Product Description / Scope and Date of Services on all requisitions entered that clearly explains the product/service

Instructions on page 8

Add a Recipient to a Comment added on a PO

Select a recipient to receive an email notification for the comment that is being added

Instructions on page 9-11

Requisition Wizard *(Shopper/Requester)*

Enter a requisition when an order is submitted for goods or when service is known – easier to process invoice when PO is already created and approved

If amount is not known – enter an estimated amount and check require receiving

Email Invoice Received for a PO to Accounts Payable *(Requester)*

Accounts Payable email: accountspayable@uwgb.edu

Please include the requisition number or PO number for reference

Account Number Required for Funding String *(Requester)*

The account number is required to be entered with the funding string. Please reference the common account codes document or use WISER to review past invoices to find the appropriate account number to be used.

Department Number Change in Funding String (*Shopper/Requester*)

All department numbers included in the funding string will end in **_GBY**

PO Line Item – 0 quantity (*Requester*)

A PO line item can **NOT** have a quantity of 0.

If a catalog item is mistakenly added from the punch out process, the line item needs to be deleted - DO NOT just change the quantity to 0.

Freight

Freight less than \$100 – entered as a separate charge when invoicing by Accounts Payable

Freight greater than \$100 – separate line needed on PO for freight amount

PIR Invoice Number (*Requester*)

PIR Invoice Number (If no invoice number provided, use the following format for invoice number: "PIR+MMDDYYYY+Lastname"- EX: DP02232021COX) ★ ⓘ

If no invoice number provided, please use the date of service when following the format listed for an invoice number to use

PIR Form Description for Payment (*Requester*)

The Description for Payment field on the PIR form is the line description field in WISER

Invoice and PIR Due Dates (*Requester/Approvers*)

Invoices, PIRs and DPs will continue to be paid on the next pay cycle after it has been entered and approved

All suppliers now have terms which drives the voucher due date, but we will override the terms and pay immediately

Add AP Form to Favorites (Requester)

Save PIR and DP forms as a template by adding to your favorites

The screenshot shows a web form titled "Payment to Individual Rep..." with a sub-header "Review and Submit". The form is in a "Required Fields Complete" state, indicated by a green bar at the top. The form is divided into two main columns: "Section" and "Progress".

Section	Progress
Supplier	✓ Required Fields Complete
Questions	✓ Required Fields Complete
Funding String	✓ Required Fields Complete
Additional Information - AP Use Only	✓ Required Fields Complete

On the left side, there is a sidebar with the following items:

- Form Number: 555667
- Purpose: Check Request
- Status: Incomplete
- Instructions
- Supplier: ✓
- Questions: ✓
- Funding String: ✓
- Additional Information - A...: ✓
- Review and Submit
- Form Approvals

At the bottom right, there are three buttons: "Previous", "Add to Favorites" (highlighted with a yellow box), and "Submit".

OR

This screenshot shows the same "Review and Submit" form as above, but within a browser window. The browser's address bar shows the URL: <https://usertest.sciquest.com/apps/Router/FormWizardRequestReview?Origin=FAVORITES&RequestId=555667&HideTopNav=false&tmstamp=1617988484158>. The browser's tab is titled "Review and Submit".

The form content is identical to the previous screenshot. However, the "Add to Favorites" button is now highlighted with a yellow box, and a dropdown menu is visible below it, containing the option "Discard Request".

The browser's address bar also shows several open tabs: SFS, WISER, Office of Financial..., WI Dept of Revenue, Security, MyUW, Allowing Participan..., ShopUW+ Sandbox, and ShopUW+ Essentials.

Add Favorite [X]

Step 1: Edit Item Details

Item Nickname *

Description

500 characters remaining

Step 2: Select Destination Folder Add New ▲

- Personal
 - PIR
- Shared

You have no shared favorites.

* Required Save Changes Close

Nickname: name for form/template

Description: description of form if desired

Select the folder to add the form to under Personal

Add Favorite [X]

Step 1: Edit Item Details

Item Nickname *

Description

500 characters remaining

Step 2: Select Destination Folder Add New ▲

- Personal
 - PIR
- Shared

You have no shared favorites.

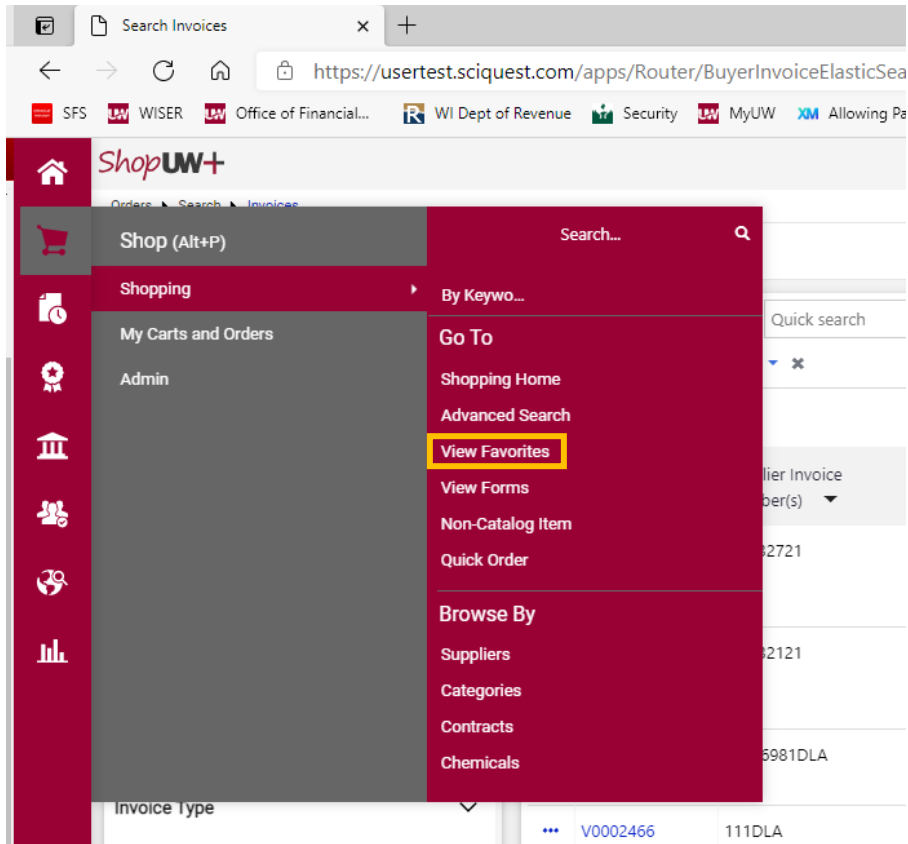
* Required Save Changes Close

Top level personal folder
Subfolder of selected folder

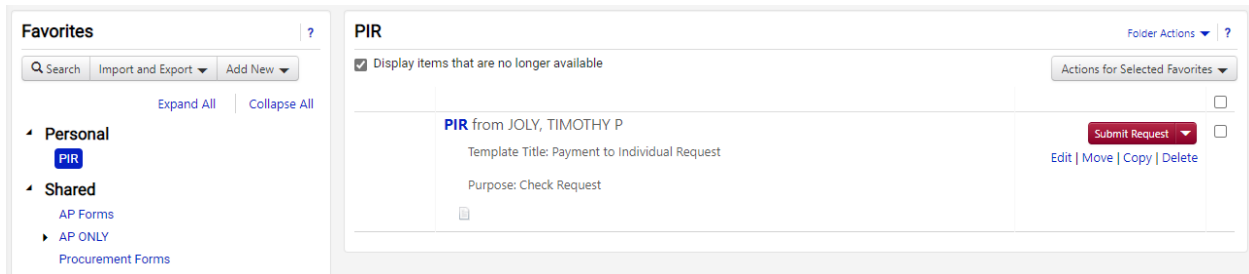
To add a new folder under Personal:

Select "Add New" and choose the location to add a new folder under

Access your previously saved Favorites by searching on the Shop tab, then Shopping, then View Favorites




Your forms added as a Favorite will be displayed in the applicable folder under your Personal folder



Receiving Required (Shopper/Requester)

Receiving required needs to be checked on a requisition for a **service** and for **food catering**

- This will serve as our approval by the requester to confirm the invoice can be paid

General  ...	
Cart Name	2021-04-09 00983707 01
Description	<i>no value</i>
Prepared by	Danielle Alexander
Business Purpose	OTHER - please write in below Other
OTHER Business Purpose	MAINTENANCE CHECK
Business Unit	UW - Green Bay (UWGBY)
Previous PO Number	<i>no value</i>
Receiving Required/Positive Approval?	<input type="checkbox"/>
New Fiscal Year	<input type="checkbox"/>

Select the pencil in the General section to update the receiving required checkbox

Edit General ×

General

Cart Name ★

Description

Prepared by Danielle Alexander

Business Purpose ★

OTHER Business Purpose

Business Unit UW - Green Bay (UWGBY)

Previous PO Number

Receiving Required/Positive Approval?

New Fiscal Year

★ Required fields Save Changes Close

Select the checkbox next to Receiving Required

Receiving Required/Positive Approval?

New Fiscal Year

★ Required fields Save Changes Close

Once you see the green check mark, select "Save Changes"

Requisition Line Description (Shopper/Requester)

Make sure to include a detailed line description on all requisitions entered that clearly explains the product/service

- The line item description is located under the Item Information page of the Requisition Wizard

[Back to Requisition](#)

Requisition Wizard

Form Number: 555670
Purpose: Procurement Request
Status: On Document

Instructions
Suppliers ✓
Form Fields ✓
General Information ✓
Purchasing Services ✓
Waiver of Bidding ✓
Item Information ✓
Review and Submit

Form Fields - Item Information

[Request Actions](#) | [History](#) | [?](#)

Item Information

User Defined Item

Unit Price: 3,383.00 USD Quantity: 1,000 Total: 3,383.00 USD

Unit of Measure: EA - Each

Product Description / Scope and Date of Services: 5 YEAR MAINTENANCE CHECK
976 characters remaining

Manufacturer Name: JF AHERN

Catalog No.:

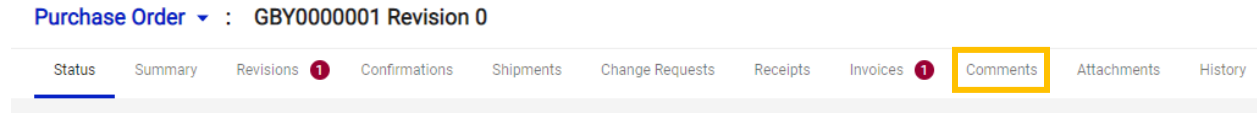
Commodity Code: 18 - Miscellaneous Commodities and Services [Edit](#)

[Previous](#) [Save Progress](#) [Next](#)

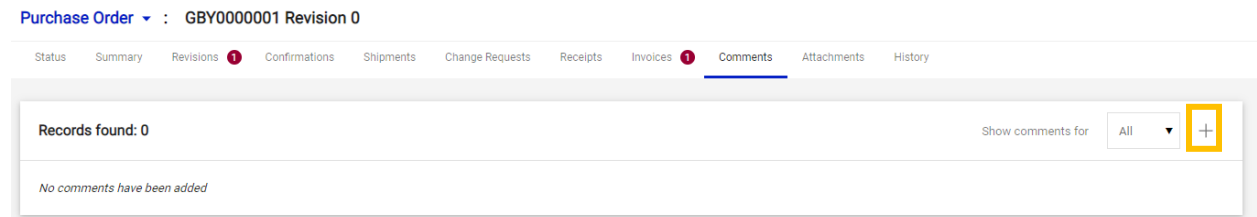
Add a Recipient to a Comment added on a PO

Select a recipient to receive an email notification for the comment that is being added

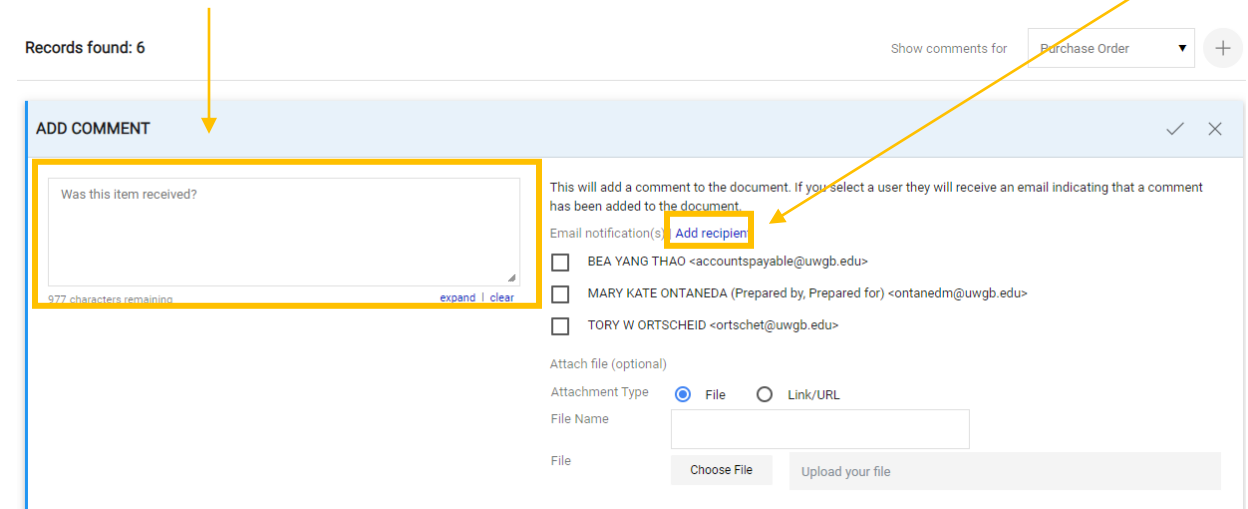
Locate the PO and navigate to the Comments tab



Select the + to add a comment



Add a comment message and select the desired recipient either from the list or select **Add Recipient**



Search for the intended recipient by name or email address and select search

User Search ✕

Last Name

First Name

User Name

Email

Business Unit ✕ 🔍

Department

Role

Results Per Page

Select the + next to the person's name to add them as a recipient of the comment

User Search ✕

New Search

1-8 of 8 Results 10 Per Page

Name	User Name	Email	Phone	Action
LEE YANG, SHENG B	00506406	leeyang@uwgb.edu	+1 920-465-2179	+
YANG THAO, BEA	00334057	yangb@uwgb.edu	+1 920-465-2206	+
YANG, KERRY N	00986313	yangk@uwgb.edu	+1 920-465-2578	+
YANG, KHOU	00963984	yangkh@uwgb.edu	+1 920-465-2515	+

The person will be added as a recipient with a green check mark next to their name.

Select the blue check mark to add the comment to the PO which will also send the email notification o the recipient.

Records found: 6 Show comments for Purchase Order ▼ +

ADD COMMENT ✓ ×

Was this item received?

977 characters remaining expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

- BEA YANG THAO <accounts payable@uwgb.edu>
- MARY KATE ONTANEDA (Prepared by, Prepared for) <ontanedm@uwgb.edu>
- TORY W ORTSCHIED <ortschet@uwgb.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name

File

Choose File Upload your file