



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.**

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.

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.		

Requested for <input type="checkbox"/> If applicable check appropriate box(es) Dept Contact <input type="checkbox"/> using mouse or space bar and enter:	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'.		

Vendor ID#: Enter the Vendor ID# found in WISDM. If vendor is new submit a W-9 form with requisition. Blank W-9 forms are available at www.irs.gov or contact the Purchasing Dept. Vendor Name: The legal name of the vendor that the PO should be made out to. Address: 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.	Vendor Phone: The Vendor's main office phone # is preferred, but a salesman/contact's number may be used. Order Fax: The Vendor's Fax # that would be used if submitting the PO by fax. Order Email: 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 #: Enter the IT Help Desk Ticket #. Required for purchases relating to computer hardware, software & copiers	Quote #: 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.	Contract #: 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	Amount	Freight (FOB) Terms	
1		102		0	0.00	Destination <input type="checkbox"/>	
2		102		0	0.00	Destination + <input type="checkbox"/>	
3		102		0	0.00	Shipping Point <input type="checkbox"/>	
4		102		0	0.00	Pick up <input type="checkbox"/>	
This Total should equal the Ext Total column below:					Total	\$0.00	Other <input type="checkbox"/>

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 <u>preferred</u> 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

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.

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

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.