Finding Information about your Purchase Orders (POs) and Requisitions

There are two main sources for information regarding your POs and requisitions.

1. **The Purchasing System Inquiry**: Choose the “Purchasing System Inquiry” link from the left side menu on Purchasing’s Home Page at [http://www.bussvc.wisc.edu/purch/purch.html](http://www.bussvc.wisc.edu/purch/purch.html)
   - Contains item detail on POs and requisitions
   - Contains tracking data on where your paper forms have been routed and if encumbrance management changes have been performed
   - Contains a printable PDF Department copy of the PO
   - Contains a link to payment data for each specific PO
   - Contains end dates for blanket orders
   - Contains information on the encumbrance balance of specific POs
   - Shows the status of a PO (open or closed)
   - Only contains information about POs and requisitions (no other types of financial transactions)
   - Searching can be done by individual PO number or by Department ID and/or a project ID
   - Does not contain data about any funding changes on your POs
   - No login required

2. **WISDM**: Available through the Services tab in My UW or login at [https://authhub.wisconsin.edu/?app=WISDM](https://authhub.wisconsin.edu/?app=WISDM)
   - Contains all your financial data, encumbrances, expenses and transactions for your area including POs – this is the official source for UW-Madison financial data.
   - Can easily be searched by department, project ID, PO number, etc.
   - Lists accurate and up to date funding information for your encumbrances/POs
   - Shows the status of a PO (open or closed)
   - Does not contain item level detail about your POs
   - Does not contain tracking data on your paper forms
   - Contact sfsmsn@bussvc.wisc.edu for assistance
Using the Purchasing System Inquiry

1. Choose the “Purchasing System Inquiry” link from the left side menu on http://www.bussvc.wisc.edu/purch/purch.html

2. Choose the “Purchasing Information Inquiry” link listed in the first bullet on http://www.bussvc.wisc.edu/purch/purchinq.html

Purchasing Information Inquiry

The Purchasing Information Inquiry allows users to search the purchasing system database for purchase order, requisition, vendor, and commodity code information, including requisition tracking information and Department PDF copies of POs. This link will open the application in a new window.

- To lookup POs and requisitions for your department, use the “Search Purchase Orders/Requisitions” link and enter your Department ID and/or Project to find orders of interest.
- To find individual POs and associated information (including payments and Department pdf copies of POs), use the “Specific Purchase Order Lookup” link and enter the PO number.
- To find/print Department PDF copies of POs, use the “Search Purchase Orders/Requisitions” or “Specific Purchase Order Lookup” link. Click the check box that appears to the left of your POs in the search results grid and choose the “Click here for a PDF file of all selected POs” link to obtain a PDF version of the Department copy of your PO to print or save.
- To track requisitions, choose the “Specific Requisition Status Lookup” link and enter the requisition number. The log will show when your requisition was last updated in the requisition generator, when the paper copy was received in Purchasing, where/if the paper copy was further routed for approvals, and once processed will show the detail information from the requisition.
- To find the PO’s encumbrance balance, status (open or closed), and expenses from WISDM, use the “Remaining Encumbrance Status Tool” link and enter the PO number.
3. The link takes you to the main menu of the Purchasing Information Inquiry on the web. Using the Purchasing Information Inquiry, you may search for requisitions and Purchase Order information after they are processed by Purchasing Services.

a. To search for all the requisitions or POs pertaining to your Department and/or Project ID choose “Search Purchase Orders/Requisitions” and enter your 6 digit Department ID (or part of your Department ID) and/or your 7 digit Project ID and a specified date range to search for. Note: The results in this search only take into account the funding listed on your requisition and will not reflect changes made through encumbrance management forms.

b. To view the encumbrance balance, status (open or closed), and payment information for the PO, choose “Remaining Encumbrance Status Tool” and enter the 7 digit PO number.

c. To view details and payment data for Purchase Orders, choose “Specific Purchase Order Lookup”.
   i. If you enter the requisition number in the Purchase Order Inquiry and get no results, this means that your PO has not yet been created by Purchasing Services. Once the PO is created, your results will appear.

d. To view requisition tracking log information and details about your requisitions (including log entries regarding encumbrance management changes), choose the “Requisition Inquiry”.

Choose to view requisition and tracking data and log data for Encumbrance Management changes.

Choose to view the PO’s encumbrance balance, status (open/closed), and payment information. Use for completing Encumbrance Management Forms.

To find all the POs entered for your Department, choose “Search Purchase Orders/Requisitions”.

Choose to view PO and payment details.
4. Choose the “Search Purchase Orders/Requisitions” link on the main page to find all the requisitions or POs pertaining to your Department and/or Project ID.

There are a number of options affecting your search that can be chosen on the Search Purchase Orders/Requisitions menu (as shown below):

a. The main search criteria appear in the highlighted box. Enter your 6 digit Department ID (or part of your Department ID) and/or your 7 digit Project ID. If you enter a partial Department ID, be sure to choose “starts with” from the drop down box.

b. Click the “Include optional search criteria” box to specify a time period you are interested in or all available data will be returned.

i. The default choice is “Req/Order Date is within the range entered below”. This is especially helpful if you are searching for a partial Department ID which will return a large number of records. Enter a date range in the available fields to limit your search or click the “Calendar” link to choose a date.

ii. Choose “End Date is within the range entered below” to search for any blanket orders or other requisitions with an end date in the specified period. This is especially helpful if you want to search for blanket orders for your Department or grant that will be ending soon.

c. The default option uses your chosen criteria to look up released POs. If you would like to search for requisitions instead, choose the Look up Requisitions radio button. Information on requisitions is only available if they have already been processed by purchasing. If they have only been entered in the External Requisition Generator, but not yet processed, they will not appear in your search results.

Note: The results in this search only take into account the funding listed on your requisition and will not reflect changes made through encumbrance management forms.
In this example, the search returned a listing of all POs created between 7/1/2009 and 7/31/2009 that had Department 036500 in their funding line. The results appear as follows and provide an overview of the order, showing the Requisition number, Vendor, Date, Amount listed on the PO, Type of order, and the End Date. If the order does not have an end date, this field will be populated with 0/0/0. Click the Order Detail button for further information about the orders listed which will take you to the detail searches described in the following pages for POs and requisitions.

Choose the “Click here to export this data to a CSV file” link near the top of the page to export the data in the table to Excel. A dialog box appears as below to let you choose to open the file with Excel or Save it. Click “OK” to continue.

Once finished, choose the “Return to Purchasing Inquiry Menu” link at the bottom of the page to begin another search.
5. To generate (and save or print) a Department copy of the PO from the search results screen, click the check box next to the PO of interest as shown below. Then click the “Click here for a PDF file of all selected POs” link.

A dialog box will appear as below allowing you to open or save the file. Click “OK”.

The PDF file will appear as below and can be printed or saved.
6. Choose the “Remaining Encumbrance Status Tool” link on the main Purchasing Inquiry page to find the encumbrance balance, status (open or closed) and payment information for a specific PO number.

Begin by entering the 7 digit PO number and click the “Go” button as shown below.

Basic information about your PO, such as the Order Date, End Date, SFS PO Status (open or closed), PO amount (original dollar total on the order), Vendor Name and Number, will be displayed at the top. Please note that the PO will only have an end date displayed if it is a blanket order or COR, otherwise the end date will appear as “0/0/0”. The grid below the basic information will display the current encumbrance balance as shown in WISDM. This information can be used to complete the Encumbrance Management Form (linked to the right of the “Go” button).

Click the “Show Expense transactions from WISDM” button to see payments made on the PO as shown below.
7. To search for information by specific Purchase Order number, choose the “Specific Purchase Order Lookup” link from the main menu and then enter a PO number to retrieve all the data pertaining to that Purchase Order.

![Image of Specific Purchase Order Lookup form]

Enter the purchase order number: 055K355 and/or the vendor number: 

- Include optional search criteria
- Order Date is within the range entered below
- End Date is within the range entered below

Enter a date range in the format MM/DD/YYYY:

- (Beginning) [Calendar]
- (Ending) [Calendar]

Begin Query  Reset Fields

In this example, the search returned all listings for 055K355, including the original order and one change order. The results appear as follows and provide an overview of the order, showing the Requisition number, Vendor, Date, Amount listed on the PO, Type of order, and the End Date. If the order does not have an end date, this field will be populated with 0/0/0. Click the “Order Detail” button to see further details of the order and any payment information from WISDM.

![Image of Purchasing Information Inquiry - Orders]

Click here to export this data to a CSV file  Back to previous page

Click here for a PDF file of all selected POs

<table>
<thead>
<tr>
<th>Req#</th>
<th>Vendor#</th>
<th>Vendor</th>
<th>Date</th>
<th>Amount</th>
<th>Type</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>055K355</td>
<td>111568</td>
<td>OMNICELL TECHNOLOGIES</td>
<td>08/12/2008</td>
<td>$480.00</td>
<td>CH</td>
<td>5/31/2009</td>
</tr>
<tr>
<td>055K355</td>
<td>111568</td>
<td>OMNICELL TECHNOLOGIES</td>
<td>08/05/2008</td>
<td>$5,496.00</td>
<td>MC</td>
<td>5/31/2009</td>
</tr>
</tbody>
</table>

Return to Purchasing Inquiry Menu
This brings up the PO details and the payment information as seen below. All of the items information and action logs are also included. Click the number next to “Total Paid” for expense detail from WISDM. To look at details of the requisition, including any action logs associated with the requisition, click the requisition number at the top of the screen next to “Review Requisition #”.

### Purchasing Information Inquiry - Order Base

**Review Requisition #: 055K355 Vendor #: 111568**

OMNICELL TECHNOLOGIES
1201 CHARLESTON RD
MOUNTAIN VIEW, CA 94043

**Agent:** JUDY MILLARD at (608) 262-6335

**Current Order Date:** 8/5/2009  **Current Order Printed:** 8/5/2009

**NOTE:** There is 1 Change Order. Final Order Amount = $5,976.00

**Order Amount:** $5,496.00

**Total Paid:** $5,976.00

**Terms:** 30D (NET 30 DAYS - NO CASH DISCOUNT)

**Pricing Method:** NET (NO TRADE DISCOUNT)

**Number of Lines:** 1  **UDD#:** A673450

**Type:** MC (MAINTENANCE ORDER - FIRM PRICING)

**Print Format Type:** REG (REGULAR PURCHASE ORDER)

**Approval Type:** N  **Status:** 0

**Previous Order#:**  **Next Order#:** B174366 111569

**Begin Date:** 6/1/2008  **End Date:** 5/31/2009

**Order Message:** VENDOR NOTE: VALIDITY OF THIS PURCHASE ORDER AND CONTRACT IS DEPENDENT UPON YOUR MEETING THE INSURANCE REQUIREMENTS STATED ON THE REVERSE SIDE OF THIS PURCHASE ORDER.

### Order Items

<table>
<thead>
<tr>
<th>Item #1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quantity</strong></td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

Once finished, choose the “Return to Purchasing Inquiry Menu” link at the bottom of the page to begin another search.
8. To search for information by specific Requisition number, choose the “Specific Requisition Status Lookup” link from the main menu and enter a requisition number to retrieve all the data pertaining to that requisition. This search is particularly useful to assist in tracking requisitions. Click “Begin Query” to start.

The Specific Requisition Status Lookup shows all log data for each requisition and will show all the requisition data once a requisition is created by Purchasing. If the requisition is only listed in the requisition generator (and not yet processed by Purchasing) only the last updated and/or printed dates from the External Requisition Generator will be available (as shown below) or any log data entered by Purchasing about when the paper requisition was received or where it may have been routed. Available log information is displayed with the newest recorded action listed first.
Once the requisition is processed by Purchasing Services, the requisition details will also appear in this search (as below). (Note that since the example used above was used to demonstrate functionality when no data other than tracking data has been entered for a requisition, the detail example used below is for a different requisition number).

Purchasing Information Inquiry - Requisition Base

Req #: 055K355       Status: R (RELEASED)
Contact UDDS: A 87 8450       Contact Name: STEVEN WALL
Amount: $5,496.00
Req. Date: 6/19/2008       Type: MC (MAINTENANCE ORDER - FIRM PRICING)
Dept. Contact: STEVEN WALL at (608) 253-5905
Vendor #: 111560       Name: OMNICELL TECHNOLOGIES
1201 CHARLESTON RD
MOUNTAIN VIEW, CA 94043
Agent: JUDY MILLARD at (608) 262-6335
# of Line Items: 2       # Attachments: 0
Terms: N30 (NET 30 DAYS - NO CASH DISCOUNT)
Discount: NET (NO TRADE DISCOUNT)
Begin Date: 6/1/2008       End Date: 5/31/2009
Exp. Date: 0/0/0       Previous Req:
Agent Notes: OMNICELL TECHNOLOGIES 5496 MC
Req Message:
VENDOR NOTE: VALIDITY OF THIS PURCHASE ORDER AND CONTRACT IS DEPENDENT UPON YOUR MEETING THE INSURANCE REQUIREMENTS STATED ON THE REVERSE SIDE OF THIS PURCHASE ORDER.

Requisition Items

<table>
<thead>
<tr>
<th>Item #1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

Description: Service Agreement: Listed Equipment
The Action Logs for the requisition appear towards the bottom of the screen and typically detail the signature step, when it was received in Purchasing, who it was assigned to, and when the PO was created and printed. If any encumbrance management forms are processed for that requisition number, a log entry about what type action was taken may also appear. The newest actions are listed at the bottom of the log.

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Action Date</th>
<th>Action By</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/14/2008</td>
<td>DEAN OR DIRECTOR</td>
<td>8/8/2008</td>
<td>DEAN OR DIRECTOR</td>
<td></td>
</tr>
<tr>
<td>8/11/2008</td>
<td>RECEIVED IN PURCHASING</td>
<td>8/11/2008</td>
<td>D2K</td>
<td></td>
</tr>
<tr>
<td>8/14/2008</td>
<td>REQUISITION ASSIGNED</td>
<td>8/14/2008</td>
<td>VINT QUAMME at (608) 262-1147</td>
<td></td>
</tr>
<tr>
<td>8/14/2008</td>
<td>ORDER CREATED FROM REQUISITION</td>
<td>8/14/2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/14/2008</td>
<td>ORDER PRINTED</td>
<td>8/14/2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/25/2008</td>
<td>SIMPLE FUNDING LINE CHANGE IN SFS</td>
<td>9/25/2008</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The requisition action logs list the actions taken pertaining to your requisition.

Actions taken from any processed encumbrance management forms will be listed here, such as funding changes, closed POs, etc.
Using WISDM to Find Information about your POs

1. Login to WISDM using your NetID and password. You may login through My UW at https://my.wisc.edu and then choose the Services tab and click on the “WISDM” link in the Financial Information Resources module or login directly at https://authhub.wisconsin.edu/?app=WISDM. The instructions below cover some of the common PO related searches available in WISDM.

2. To search for encumbrance information for a specific PO.
   a. Under the drop down from Main Menu, choose AP/PO and then the PO Encumbrance Search as shown below.

   ![Main Menu Screen](image1.png)

   b. This brings you to the Search Criteria screen as show below. Enter the first seven digits of your PO number in the PO field (such as 105K232 in this example).

   ![Search Criteria Screen](image2.png)
c. The PO ID, funding information and payment summary information are displayed below the search criteria. To see further details on the PO you may click the PO ID.

d. Once the results are displayed, you may click on the PO number to go to the PO detail. The PO detail page (shown below) will display the specific details of your PO including the funding line distributions and the first 250 characters of the item description. The PO status is circled on the screenshot below. When the PO is open and available for payment, it will show up as “Dispatched” as below. Once the PO has been closed, the PO Status will appear as “Complete”.

Click on the PO number to go to the PO detail page.

PO Status indicates if the PO is “Dispatched” (open) or “Complete” (closed).
3. To search for all the POs listed on a specific project:
   a. Under the drop down from Main Menu, choose AP/PO and then the PO Encumbrance Search as shown below.

   b. This brings you to the Search Criteria screen as show below. Enter your Project in the “Project” field and click the “Submit” button.

   c. This will display all the results for the current PO encumbrances for the current fiscal year on the project ID that was entered as shown below. To view PO encumbrances for a previous fiscal year, change the year displayed in the drop down box in the upper right corner of the screen.

<table>
<thead>
<tr>
<th>PO ID</th>
<th>PO Date</th>
<th>PO Vendor Name</th>
<th>Fund</th>
<th>Dept</th>
<th>Project</th>
<th>Program</th>
<th>Account</th>
<th>Orig Amt</th>
<th>PTD</th>
<th>Open Bal</th>
</tr>
</thead>
<tbody>
<tr>
<td>071k330001</td>
<td>8/12/2008</td>
<td>RAININ INSTRUMENT LLC</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>B6124720001</td>
<td>4/22/2008</td>
<td>NEOCLONE</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>B6124930001</td>
<td>4/22/2008</td>
<td>ACTIVE MOTIF</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>B6125532001</td>
<td>4/22/2008</td>
<td>AXXORA LLC</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>B6126329001</td>
<td>4/22/2008</td>
<td>AFFYMETRIX</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>B6126340001</td>
<td>4/29/2008</td>
<td>ADDGENE INC</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>B6126653001</td>
<td>4/29/2008</td>
<td>AGENCOURT BIOSCIENCE CORPORATION</td>
<td>144</td>
<td>537200</td>
<td>146Q065</td>
<td>4</td>
<td>3105</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
</tbody>
</table>
4. To determine if your funding string is valid:
   a. Under the drop down from Main Menu, choose Other and then the Funding Validation/Inquiry as shown below.

   ![Main Menu screenshot]

   b. Enter your funding data and click the “Edit” button as shown below. The results will appear below the funding entry.

   ![Transaction Criteria screenshot]

   Enter data in these fields and click “Edit”

<table>
<thead>
<tr>
<th>Error ID</th>
<th>Error Message</th>
<th>Link to Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Funding string is valid</td>
<td></td>
</tr>
</tbody>
</table>
c. If there is a problem, errors will be displayed. In this case, the project is closed.

d. To find the valid Fund Code, DeptIDs and Program Codes available on a Project ID, enter the Project ID and click the “List Valid Combinations” button.

<table>
<thead>
<tr>
<th>Fund Code</th>
<th>DeptID</th>
<th>ProjectID</th>
<th>ProgramCode</th>
<th>Descr</th>
</tr>
</thead>
<tbody>
<tr>
<td>133</td>
<td>534220</td>
<td>1330LC07</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>133</td>
<td>534220</td>
<td>1330LC07</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td>133</td>
<td>534285</td>
<td>1330LC07</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>133</td>
<td>534285</td>
<td>1330LC07</td>
<td>R</td>
<td></td>
</tr>
</tbody>
</table>