Logging into the Requisition and Number Generator
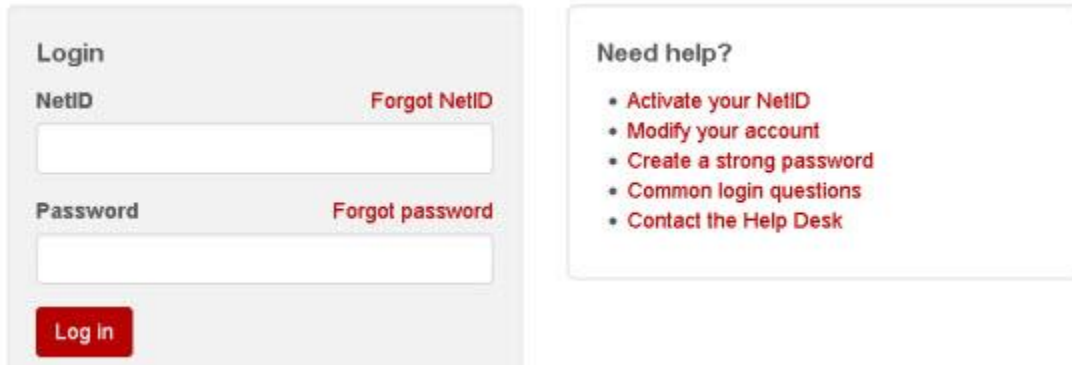
- Login to the Requisition and Number Generator through My UW using your NetID and password. If you do not already have a NetID and password, choose the "Activate your NetID" link to begin. For any questions pertaining to My UW logins or problems activating your NetID, please contact DoIT's Help Desk at 264-HELP.
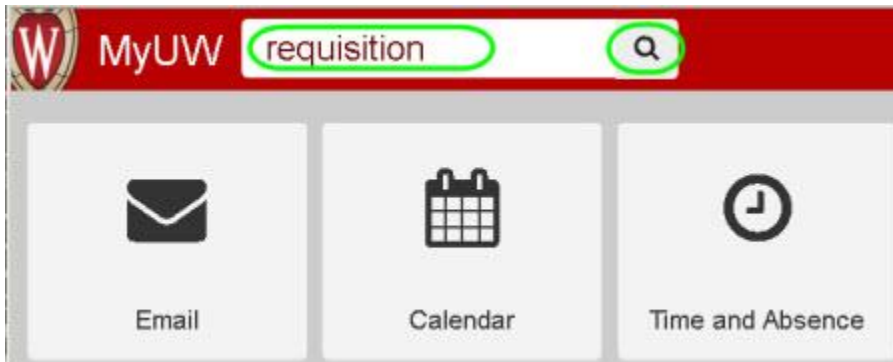
NetID Login

- Determine if the Requisition and Number Generator appears in MyUW home. Any payrolled individual at UW-Madison should be able to search for the widget and add it to MyUW home.

- If the widget is not found, search for "requisition" in the search bar at the top of the site and click on the search icon.

- Find the Requisition and Number Generator widget from the list and click on the "Add to home" link.

- Return to MyUW Home and find the Requisition and Number Generator widget. The content and its arrangement on the page can vary and the widget can be easily moved to any desired spot.
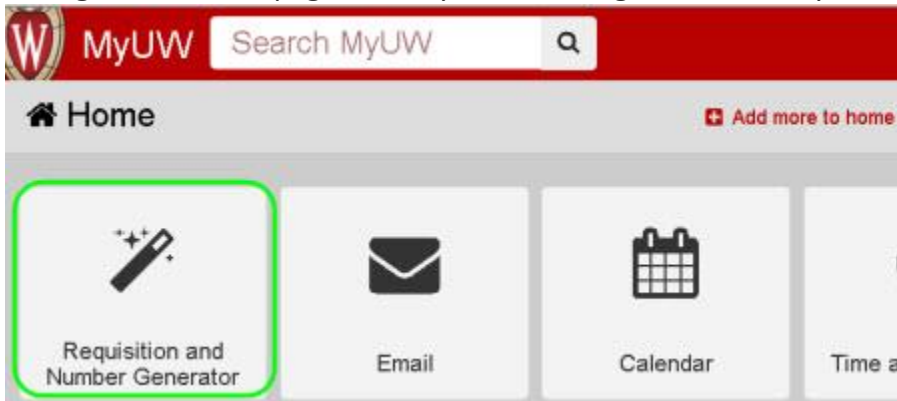
- Choose one of the links within the widget to begin to generate external requisitions, internal work orders, or to request requisition numbers. The following sections of this tutorial will cover the available options in more detail.
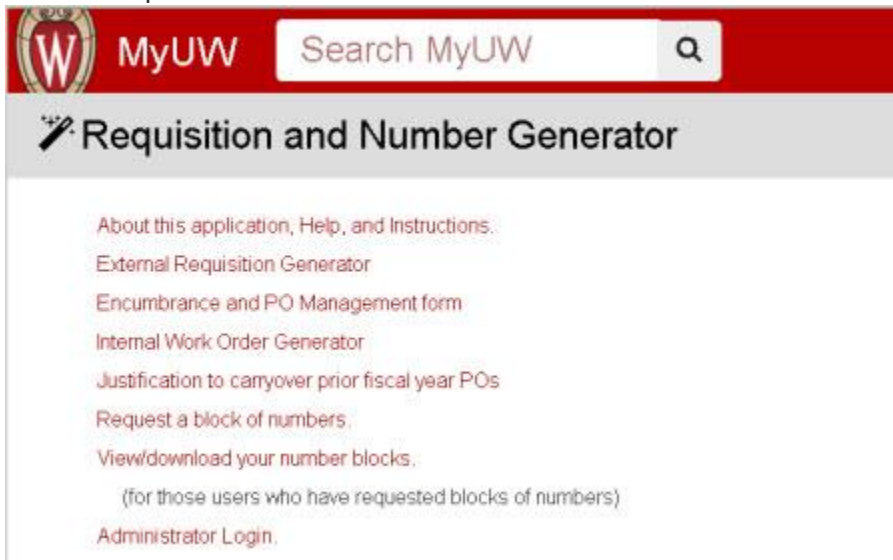
How to Correctly Handle a COR (Continuing Order Requisition)

The external requisition generator will include the amount spent to date for the previous requisition number. This amount will also appear on the printed copy of the requisition. If there has been limited or no activity on the previous year's order, please <u>do not renew</u> your COR. Instead, consider whether the products or services listed on the requisition can be obtained from <u>Shop@UW</u> or by using your department's Purchasing Card. If the amount spent exceeds $100,000, Purchasing may contact you regarding opportunities for contracting for the goods or services purchased. If you don't want to renew your COR, simply ignore the entry on the summary report and take no further action.

To renew a COR and generate the paper copy for signature follow these steps:

1. Access the external requisition generator through <u>My UW</u>. Click on External Requisition Generator (second link from the top of the list).
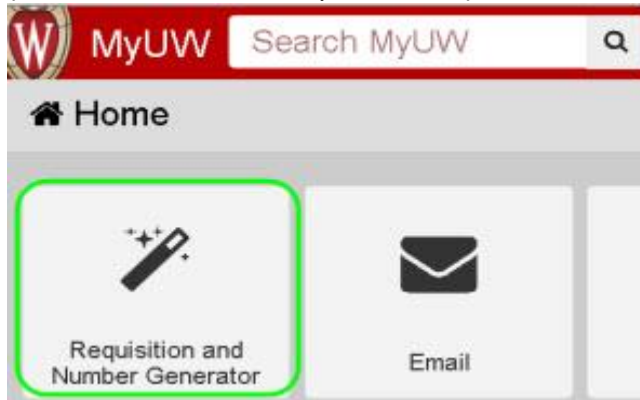
2. Type the new requisition number listed on the COR summary sheet into the "requisition #" field near the bottom of the main menu in the "**Update an existing requisition**" area and click the "Update Requisition" button.

3. Review the "Base Requisition" details on the COR for things like the following and make any appropriate changes. Then choose "**Save and Go to Items**" button at the bottom of the screen.

- requisition begin and end dates
- department contact person and phone number
- vendor name and address
- ship to address

External Requisition Generator

Requisition Number:	**869K632**
Requisition Date:	02/07/2019
Requisition Begin Date:	07/01/2019 (For recurring orders ONLY)
Requisition End Date:	06/30/2020 (For recurring orders ONLY)
Contact Person:	LORI PULVERMACHER
Contact Phone:	(608) 262 − 1528
Previous PO:	(If applicable)
Total Paid on Previous PO:	
Positive Approval?	○ Yes ● No
Requisition Level Discount:	NO TRADE DISCOUNT ▼
Comments:	
	Select standard text for Comments line: -------- ▼
Dept. Chairperson:*	
Dean or Director:*	

* This will appear as the printed name in the signature block on your requisition.

Click here to query the Purchasing System for Vendor information.

Vendor Number: (optional)	4757 [Get Vendor Name & Address]
Vendor Name:	GORDON FLESCH CO INC
Address Line 1:	2675 RESEARCH PARK DR
Address Line 2:	MADISON, WI 53711
Address Line 3:	
Address Line 4:	

Ship To:	UNIVERSITY OF WISCONSIN
Address Line 1:	21 N PARK ST STE 6101
Address Line 2:	MADISON, WI 53715
Address Line 3:	

Save and Go to Main Menu	Save and Go to Items	Save and Go to Funding	Save and Print Requisition
Go to Main Menu	Go to Items	Go to Funding	Print Requisition

4. Review the item amounts and descriptions choose the "Edit" button to enter the item line and "Update" to save your changes. CORs with the account codes that are not services, rental/leases, maintenance contracts, software or RSP grant sub-agreements, may have had the amounts changed to $1. Then click on "**Go to Funding**" button.

External Requisition Generator

Requisition Items for 869K632

Total Requisition Amount = $3,547.00

Total Funding Amount = $3,547.00

		Qty	Units	Discount (optional)	Category (optional)	Unit Cost	Description
Edit	Delete	1	TERM			$3,546.00	Copier F4938, SN MV54865 $295.50/month
Edit	Delete	1	TERM			$1.00	Maintenance $0.00675/black white copy $0.00758/color copy
Save Item	Cancel			🔍	🔍		

To save each item, complete the text fields and click the Save Item button.

To edit an existing row, click the Edit button, make your changes and click the Update button.

To delete an existing row, click the Delete button. Click Ok when prompted.

Go to Main Menu	Go to Base Req	Go to Funding	Print Requisition

5. Click on the "Edit" button to enter the appropriate dollar amount and edit any portion of the funding line. **If your funding involves a project number, make sure your COR end date does not exceed your project end date. Review all funding changes carefully and that the total requisition amount and the total funding amount match before submitting the requisitions. Requisitions with absent or incomplete funding lines <u>will not</u> be processed.** Click on "Update" to save changes, then "**Print Requisition**".

External Requisition Generator

Requisition Items for 869K632

Requisition Date : 2/7/2019

Total Requisition Amount = $3,547.00

Total Funding Amount = $3,547.00

		Amount	Account	Fund	Dept	Program	Fiscal Year (YYYY)	Project	Bldg
Update	Cancel	3546	2620	101	036500	1	2019		
Edit	Delete	$1.00	4620	101	036500	1	2019		

To save each funding line, complete the text fields and click the Save Line button.

To edit an existing row, click the Edit button, make your changes and click the Update button.

To delete an existing row, click the Delete button. Click Ok when prompted.

Go to Main Menu	Go to Base Req	Go to Items	Print Requisition

6. Prepare and route completed requisition as per your Dean's office procedure as you would for any other external requisition. **Requisitions must be printed and signed by the authorized Dean's office representative to be processed into a Purchase Order (PO) by Purchasing.**

Academic Support Services Agreements CORs:

The intent and purpose of ASSAs are to provide a mechanism to procure Instructional or Research Services of a sole source nature under the authority of The Board of Regents.

- ASSA CORs require the attachment of Sole Source justification annually.
- If your sole source justification form from the previous year(s) still applies, Purchasing will accept a copy of it with a <u>current signature and date</u>. If the justification needs to be updated, make all changes in **RED**.
- Forms can be downloaded from our website at http://www.bussvc.wisc.edu/purch/forms.html
- Questions should be referred to the Procurement Specialist responsible for the specific service category.

Dean's Office Procedures for CORs:

1. Review the printed requisition and confirm that a new COR is required based on previous spend amount.

2. Review the funding and information that the Department submitted on the COR.

3. If deemed appropriate, sign, date, and forward as follows:

- CORs referencing **fund 133** with account codes **2460, 2470, 2480** (maintenance & repairs), or **2300, 2305, 2310, 2320, 2625, 2330, 2335, 2340, 2345, 2350, 2355, 2360, 2370, 2410, 3810** (rental & leases), should be sent to Research & Sponsored Programs, Suite 6401 21 N. Park Street.

- All other CORs are to be sent to Purchasing Services, Suite 6101 21 N. Park Street.

Please note that the encumbrance will appear in WISDM AFTER the purchase order is released by Purchasing Services.

Please contact Purchasing Services with any questions.