Finding Information about your Legacy Purchase Orders (POs) and Requisitions issued before April 26th 2021

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
   a. Contains item detail on POs and requisitions
   b. Contains a printable PDF Department copy of the PO
   c. Contains end dates for blanket orders
   d. Only contains information about POs and requisitions (no other types of financial transactions)
   e. Searching can be done by individual PO number or by Department ID and/or a project ID
   f. Does not contain data about any funding changes on your POs
   g. No login required

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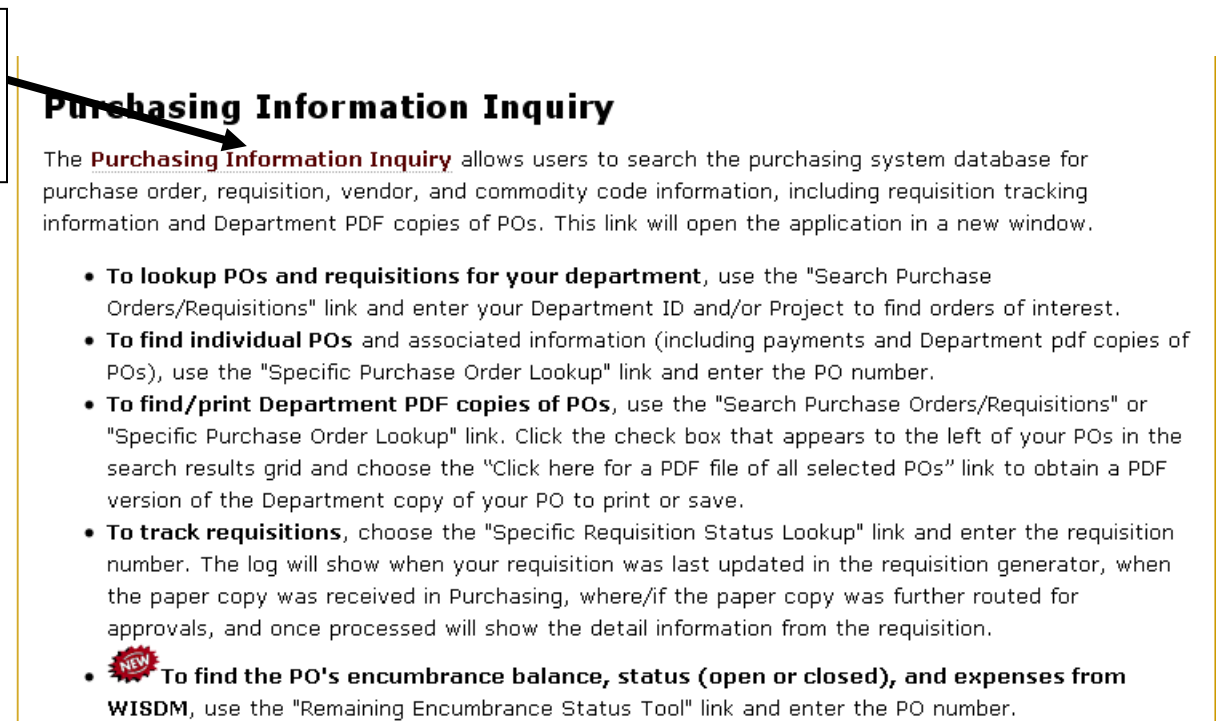
Using the Purchasing System Inquiry

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

Choose Purchasing System Inquiry

UNIVERSITY OF WISCONSIN-MADISON

PURCHASING SERVICES

Search:

Business Services ▾

Search

Contracts

Purchasing System Inquiry

Directory

How to Purchase Goods and
Services

Purchasing Services

Purchasing provides the University w
information.

Items of Interest

*   **New Purchasing Workshops**

    Purchasing will be offering new
    and Services: Intermediate To

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

Choose Purchasing Information Inquiry

Se

B

Search

Contracts

E-commerce Ordering
System

Purchasing System
Inquiry

Directory

How to Purchase Goods
and Services

Policies and Procedures

Forms and Letters

External Requisitions

Encumbrance
Management

Ineligible / Eligible
Vendors

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".

UNIVERSITY OF WISCONSIN-MADISON   UW HOME   MY UW   UW SEARCH

Purchasing Information Inquiry

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

Campus User Tools:

- Search Purchase Orders/Requisitions: Find, view and print your released purchase orders or requisitions by Department, Project, and/or date range.

- Remaining Encumbrance Status Tool: View details about a known purchase order number, including the encumbrance balance, status (open or closed), and expenses from WISDM.

- Specific Purchase Order Lookup: View details about a known purchase order number, including payment information.

- Specific Requisition Status Lookup: View status details and tracking information about a known requisition number.

- Vendor Inquiry: Get address, phone information, status, commodities, cross-references, payment summaries, vendor characteristics and orders.

   o By known Vendor Number
   o By Vendor Name element or Vendor Address fragment

Choose to view PO and payment details

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

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

3

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.

UNIVERSITY OF WISCONSIN-MADISON

Purchasing Information Inquiry - Search Purchase

◉ Look up Released Purchase Orders

○ Look up Requisitions

Dept [is exactly ▾] 036500

and/or

Project = [   ]

☑ Include optional search criteria

◉ Req/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) 7/1/2009   Calendar

(Ending) 7/31/2009   Calendar

[Begin Query]   [Reset Fields]

Enter your 6 digit Department ID and/or your 7 digit Project ID to search for your POs. Change the drop down to "starts with" to search for a partial Dep. ID

To limit the search to a specific time period or to find blanket orders ending at a specified date, check the "Include optional search criteria" box and enter a date range.

4

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.

UNIVERSITY OF WISCONSIN-MADISON   UW HOME   MY UW   UW SEARCH

Purchasing Information Inquiry - Orders by Funding

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

Click here for a PDF file of all selected POs

☑		Req#	Vendor#	Vendor	Date	Amount	Type	End Date
☐	Order Detail	B160241	126688	SCAN GLOBAL LOGISTICS	07/01/2009	$1.00	BC	6/25/2010
☐	Order Detail	B194235	4757	GORDON FLESCH CO INC	07/01/2009	$2,664.28	LC	6/30/2010

Return to Purchasing Inquiry Menu

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.
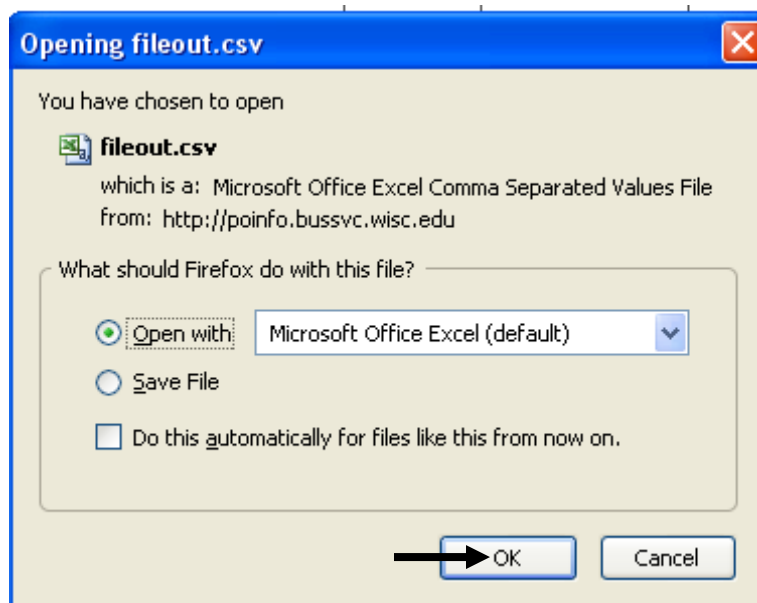
Opening fileout.csv

You have chosen to open

fileout.csv

which is a: Microsoft Office Excel Comma Separated Values File
from: http://poinfo.bussvc.wisc.edu

What should Firefox do with this file?

◉ Open with   Microsoft Office Excel (default)

○ Save File

☐ Do this automatically for files like this from now on.

OK   Cancel

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".
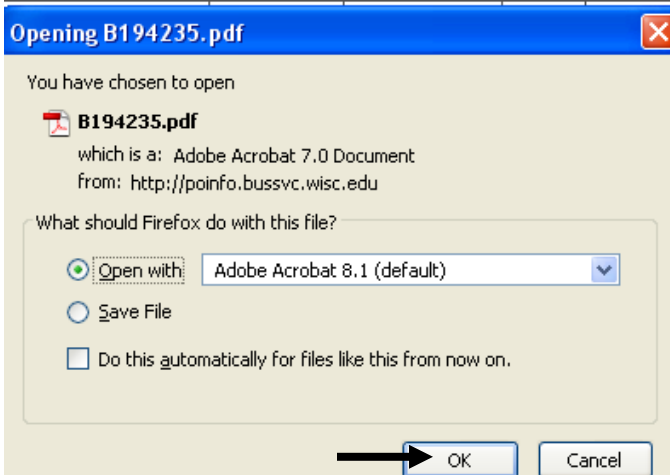
The PDF file will appear as below and can be printed or saved.

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.

Enter your 7 digit PO number and click "Go" to begin

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).

WISDM Encumbrance Balances by Funding Source for the current fiscal year
Total encumbrance balance for current fiscal year = $1,997.46

FY	Fund	Project	Program	Account	Dept ▲	Encumbrance Amt
2011	101		1	2370	036500	$1,997.46
2011	101		1	2480	036500	0

Show Expense transactions from WISDM

Click the "Show Expense transactions from WISDM" button to see payments made on the PO as shown below.

Hide Expense transactions from WISDM
Expense transactions below are from fiscal year 2008 through today

PO ID	FY	Fund	Project	Prog	Account	Dept	Voucher#	Invoice#	Expense Amt	Tran Dt. ▲	Posted Dt.
B299692001	2011	101		1	2370	036500	01060681	TF171	$221.94	20100716	20100719
B299692001	2011	101		1	2480	036500	01060681	TF171	$33.35	20100716	20100719
B299692001	2011	101		1	2480	036500	01078092	U3473	$33.99	20100816	20100817
B299692001	2011	101		1	2370	036500	01078092	U3473	$221.94	20100816	20100817
B299692001	2011	101		1	2370	036500	01096371	UQ212	$221.94	20100916	20100917
B299692001	2011	101		1	2480	036500	01096371	UQ212	$28.44	20100916	20100917

Total expenditures (fiscal year 2008 through today) = $761.60

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.

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.

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: 8/5/2008   **Current Order Printed:** 8/5/2008

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

Order Amount: $5,496.00

Total Paid: $5,976.00 ◄———

> Click the number next to "Total Paid" for expense detail from WISDM.

Terms: N30 (NET 30 DAYS - NO CASH DISCOUNT)

Pricing Method: NET (NO TRADE DISCOUNT)

Number of Lines: 1   **UDDS:** A878450

Type: MC (MAINTENANCE ORDER - FIRM PRICING)

Print Format Type: REG (REGULAR PURCHASE ORDER)

Approval Type: N   **Status:** O

Previous Order#:   **Next Order#:** B174366 111568

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

Item #1

Quantity	Units	Unit Price	Total Price
1	TERM	$5,496.00	$5,496.00

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.

Choose Begin Query

Enter the requisition number

UNIVERSITY OF WISCONSIN-MADISON

Purchasing Information Inquiry - Specific Requisition Status Lookup

Enter the requisition number: 086k181

Begin Query

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.

UNIVERSITY OF WISCONSIN-MADISON   UW HOME   MY UW

Purchasing Information Inquiry - Specific Requisition Status Lookup

The most recent log data is displayed at the top

Enter the requisition number: 086K181

Action	Date
LAST UPDATED IN REQ GENERATOR	10/21/2008
REQ ASSIGNED TO CRESCENT KRINGLE at (608) 262-5321	10/20/2008
REQ BACK IN PURCHASING FROM RSP APPROVED	10/20/2008
REQ RECEIVED IN PURCHASING AND SENT OUT TO RSP FOR REVIEW	10/20/2008
RECEIVED BACK FROM DEANS OFFICE REPAIRED	10/20/2008
SENT BACK TO DEANS OFFICE-PROBLEM REQ	10/20/2008
RECEIVED IN PURCHASING	10/20/2008
LAST PRINTED IN REQ GENERATOR	10/20/2008

Begin Query

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) 263-9905

Vendor #: 111568   **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

Item #1

Quantity	Units	Unit Price	Total Price	Status
1	TERM	$5,496.00	$5,496.00	R (RELEASED)

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.

Action Logs

Date: 8/14/2008	**Action:** DEAN OR DIRECTOR	
Action Date: 8/8/2008	**Action By:** DEAN OR DIRECTOR	
Description:		

Date: 8/11/2008	**Action:** RECEIVED IN PURCHASING	
Action Date: 8/11/2008	**Action By:** D2K	
Description:		

Date: 8/14/2008	**Action:** REQUISITION ASSIGNED	
Action Date: 8/14/2008	**Action By:**	
Agent: VINT QUAMME at (608) 262-1147		

Date: 8/14/2008	**Action:** ORDER CREATED FROM REQUISITION	
Action Date: 8/14/2008	**Action By:**	
Description:		

Date: 8/14/2008	**Action:** ORDER PRINTED	
Action Date: 8/14/2008	**Action By:**	
Description:		

Date: 9/25/2008	**Action:** SIMPLE FUNDING LINE CHANGE IN SFS	
Action Date: 9/25/2008	**Action By:**	
Description:		

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.

   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).

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.

PO ID	PO Date	PO Vendor Name	Fund	Dept	Project	Program	Account	Sub-Class	Orig Amt	PTD	Open Bal
105K232001	12/23/2008	GE HEALTHCARE	233	539300	233HG48	4	4603		894,393.00	89,436.00	894,393.00
105K232001	12/23/2008	GE HEALTHCARE	233	539300	233Y461	4	4603		305,607.00	30,564.00	305,607.00
									1,200,000.00	120,000.00	1,200,000.00

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

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 screen shot 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".

UNIVERSITY OF WISCONSIN SYSTEM
UWISDM
Wisconsin Data Mart for PeopleSoft Financials

PURCHASE ORDER 105K232001

Main Menu ▼ Comment   Add to Favorites   UWMSN ∨ - 2009 ∨

PO Date	12/23/2008
PO Ref	
Vndr ID	0000016763
Vndr Name	GE HEALTHCARE
Vndr Short Name	GEHEALTHCA-007
PO Status	Dispatched
PO Balance	1,080,000.00
Buyer Name	HRD

PO Status indicates if the PO is "Dispatched" (open) or "Complete" (closed).

Lines

Line No	Item Descr	Category ID	UOM	Qty	Monetary Amt	Status
1	3T MR750 Scanner per Quote #P1-C57500 V5 dated 12/11/2008	89847	LOT	1	1,200,000.00	Active
					1,200,000.00	

Distribution

Line No	Sched No	Acct	Fund	Dept	Project/Grant	Prog Code	Sub-Class	PO Qty	Status	Merch Amt
1	1	4603	233	539300	233HG48	4		0.7453	Open	894,393.00
1	1	4603	233	539300	233Y461	4		0.2547	Open	305,607.00
										1,200,000.00

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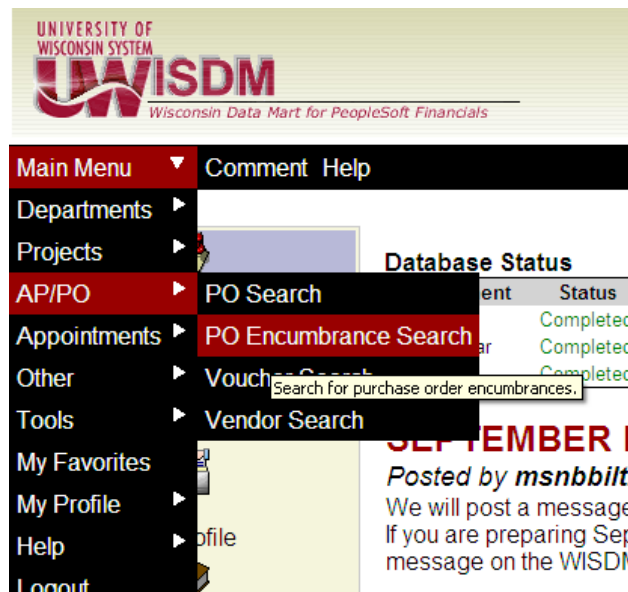
   b. This brings you to the Search Criteria screen as show below. Enter your Project in the "Project" field and click the "Submit" button.
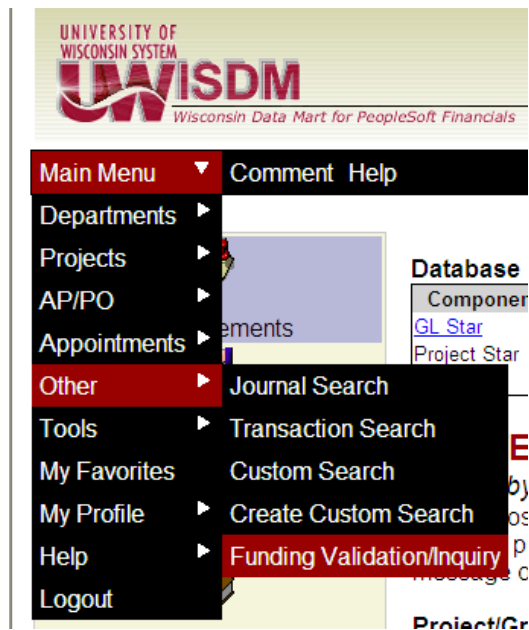

Enter your Project ID

Displays PO encumbrances on the project entered (144qc65) for the current fiscal year.

   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.

PO ID	PO Date	PO Vendor Name	Fund	Dept	Project	Program	Account	Orig Amt	PTD	Open Bal
071K330001	8/12/2008	RAININ INSTRUMENT LLC	144	537200	144QC65	4	3105	1.00	0.00	1.00
B512470001	4/22/2008	NEOCLONE	144	537200	144QC65	4	3105	1.00	0.00	1.00
B512492001	4/22/2008	ACTIVE MOTIF	144	537200	144QC65	4	3105	1.00	0.00	1.00
B512562001	4/22/2008	AXXORA LLC	144	537200	144QC65	4	3105	1.00	0.00	1.00
B512632001	4/22/2008	AFFYMETRIX	144	537200	144QC65	4	3105	1.00	0.00	1.00
B512654001	4/28/2008	ADDGENE INC	144	537200	144QC65	4	3105	1.00	0.00	1.00
B512665001	4/28/2008	AGENCOURT BIOSCIENCE CORPORATION	144	537200	144QC65	4	3105	1.00	0.00	1.00

4. **To determine if you funding string is valid:**
   a. Under the drop down from Main Menu, choose Other and then the Funding Validation/Inquiry as shown below.

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

c. If there is a problem, errors will be displayed. In this case, the project is closed.

Transaction Type ⊙ Expense/Revenue ○ Payroll ○ Budget

As Of Date 1/10/2008

Dept 348700

Fund 144

Program 4

Project ID 144am24

Account 2100

Class Field

Records Per Page 50

Edit List Valid Combinations

Enter data in these fields and click "Edit"

In this case - the project is closed

Error ID	Error Message	Link to Details
-20024	Today's date (jrnl date) is outside proj dates	PS_KK_CF_VALUE_CHKD2
-20032	The enc dates are outside the project dates	PS_KK_CF_VALUE_CHKD2, PS_KK_CF_VALUE_CHKD3

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.

TRANSACTION CRITERIA

Transaction Type ⊙ Expense/Revenue ○ Payroll ○ Budget

As Of Date

Dept

Fund

Program

Project ID 133dl07

Account

Class Field

Records Per Page 50

Edit List Valid Combinations

Enter Project ID and hit "List Valid Combinations". View the valid funding list in the popup window (next page).

Valid values will be displayed below.

FundCode	DeptID	ProjectID	ProgramCode	Descr
133	534220	133DL07	4	
133	534220	133DL07	R	
133	534285	133DL07	4	
133	534285	133DL07	R	

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