To view financial detail by Purchase Order, Voucher or Supplier (formerly known as Vendor), navigate to the WISER Main Menu and choose the ‘Find POs, Vouchers, Vendors’ link under the ‘AP/PO’ heading.



## **Purchase Order (PO) Search**

On the ‘Find AP/PO Data’ page, select the ‘PO Search’ link in the first box to reach the PO Search screen.


*Search for Purchase Orders*

On the next screen, one can ‘Find POs’ using the search field options.


*PO Search*

On the ‘Find POs’ search screen, are the following search fields:

### PO Search Options

***PO ID
PO Date***

***Total Amount***

***Vendor Name***

***Vendor ID***

***PO Ref (Reference)***

***PO Type***

***Dept***

***Project***

The ***PO ID*** field allows the user to search on complete or partial PO ID. ***PO Date*** can be an exact date or a date range. ***Total Amount*** is the total dollar amount of the purchase order equal to, greater than or less than the value entered. ***Vendor Name*** allows the user to search on purchase orders related to a specific supplier by name or partial name. The ***Vendor ID*** field will search on the exact or partial Vendor ID number. The PO Reference field may have relevant PO information, or it may be blank, depending on how individual institutions use this field in SFS. A full dropdown list of ***PO Type*** is available for searching. Also available are the ***Department (Dept)*** and ***Project*** values relating to the purchase order(s).

Once all the criteria have been determined, clicking  will retrieve the results.
 
*PO Search Example and results*

Search Tips:

* Search fields are not case sensitive in WISER.
* Any combination of available search fields may be used to narrow and expedite search requests.
*  To update your search criteria, click the magnifying glass.

On the ‘Find POs Search Results’ page, click any heading to sort the data by that field. The ***Vendor ID*** and ***PO ID*** fields are clickable hyperlinks, which take the user to respective detail information. The PO ID link pulls up the Purchase Order detail information page which includes PO Line, Distribution and AP Invoice data for that purchase order.


*PO Detail*


*Supplier Detail*

The PO Search page results can be exported to Excel or pinned to the Dashboard.



## **Voucher Search**

To view financial information by Voucher, users can select the middle box on the ‘Find AP/PO Data’ search page and click the ‘Voucher Search’ option.   *Voucher Search*

### Voucher Search Options

***Voucher ID
Invoice Number***

***Invoice Date***

***Payment ID***

***Vendor ID***

***Vendor Name***

***PO ID***

***Journal Date***

***Line Description***

***Amount***

***Dept***

***Project***

***Include Payroll Deductions***

The ‘Find Vouchers’ search screen lets the user search on a full or partial ***Voucher ID*** or AP ***Invoice Number***. The ***Invoice Date*** can be on a specific date, before or after a specific date, or it can be a range of dates. Users can also search on the ***Payment*** ***ID*** number, ***Vendor*** ***ID***, all or part of the ***Vendor Name*** (not case specific) and a full or partial ***PO ID*** associated with the Voucher. The Journal Date or date range, the Voucher ***Line Description*** and dollar ***Amount*** of the Voucher are also available as limiting criteria fields. In addition, the ChartField values of ***Fund***, ***Dept***, ***Project*** and ***Account*** can also be used to search for Vouchers. There is also a checkbox to “***Include Payroll Deductions***” in your Voucher search. The default is set to unchecked (not include Payroll Deductions).
 
 *Include Payroll Deductions Option*

Once the user clicks , the search itself can be pinned to a Dashboard or the search result information can be exported to Excel.
 
*Pin the search to Dashboard or use the gear dropdown to choose "Export to Excel"*

As with the PO Search, the Voucher Search allows users to drill into the hyperlinked Voucher ID and Supplier (Vendor) ID values on the Search Results page.




 *Voucher Detail Page*


*Supplier (Vendor) Detail Page*

## **Supplier (Vendor) Search**

From the “Find AP/PO Data” page, users can find valuable information about Suppliers and related transacations by clicking on the ‘Vendor Search’ link. 

### Supplier (Vendor) Search Options

***Vendor ID***

***Vendor Name***

***Vendor Status***

***Street Address***

***City***

***State***

***Postal Code***

***Country***

The full 10-digit ***Vendor ID*** can be entered in the ***Vendor ID*** field, or the remaining numbers once the zeros are truncated. The ***Vendor ID*** field defaults to an “ends in..” type of search. So, if one enters “17”, the search will retrieve Vendor ID “0000000017”. If one enters “1785”, the search will retrieve Vendor ID “0000001785”.

The ***Vendor Name*** field will allow for full or partial Supplier name entry. Using the ***Vendor Status*** field, users can look for ‘Approved’ status Suppliers, ‘Unapproved’ Suppliers or all Suppliers. Users can narrow their Supplier search based on physical location information also. The ***Street Address***, ***City***, ***State***, ***Postal Code*** (Zip Code) and ***Country*** fields are searchable fields for Supplier address information.

Once the user clicks , the search results page provides the Supplier information requested. There are clickable hyperlinks on the Search Results page which provide greater detail on the Supplier, any associated POs and/or Vouchers.



Cannot go further – no data to show

Have questions or comments? Please contact wisdm-bug@lists.wisc.edu or click the link in the bottom right hand corner of any WISER page.

Document Revision History

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