

Justification to Carryover Prior Fiscal Year POs User Guide

Overview:

Once a Purchase Order (PO) has been carried over to the next fiscal year, it requires a justification to keep it open and again carry it over into the next fiscal year. The Justification to Carryover Prior Fiscal Year POs application can be used to justify keeping those POs created in the previous fiscal year open if necessary. This process replaces the previous paper based process and allows users to search for their own POs, download information to Excel, and document justifications without having to route paper. Anyone that has access to the Requisition module in My UW will have access to this application.

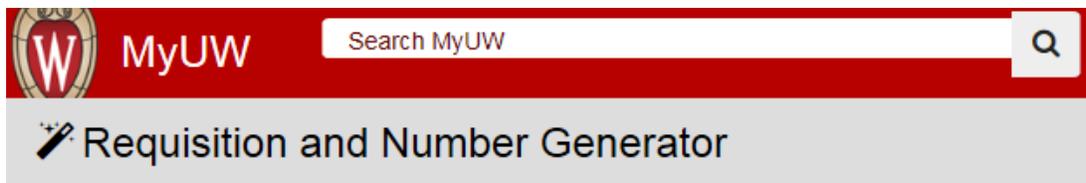
Only POs created in the previous fiscal year that are still open will be found in the application. Any PO created in the current fiscal year that is still open at the end of the fiscal year will remain open and does not need to be justified. All POs listed in this application are automatically set to close before the end of the fiscal year unless justified as needing to stay open. If you do not need the PO to stay open, simply do nothing and it will be closed in June. All justified POs will remain open and be carried into the next fiscal year.

NOTE: Grant sub-agreement POs are exempt from this process and will not be closed until requested by Research and Sponsored Programs (RSP).

Step by Step Instructions:

1. Log into the justification application on your Services Tab in My UW

Login to My UW at <https://my.wisc.edu> using your NetID and password. Once logged in, launch “The Requisition and Number Generator” app. (You may have to search for the app in the search box if it is not on your home page.) Click on the text “Justification to carryover prior fiscal year POs” to open the application.



About this application, Help, and Instructions.

External Requisition Generator

Encumbrance and PO Management form

Internal Work Order Generator

Justification to carryover prior fiscal year POs

Request a block of numbers.

View/download your number blocks.

(for those users who have requested blocks of numbers)

Administrator Login.

Choose “Justification to carryover prior fiscal year POs”

2. **Enter all or part of your Department ID to search for POs** requiring justification to remain open. In the example below, "19" was entered to find all POs relating to any Department ID beginning with that number. You may also enter the entire 6 digit Department ID to search for POs specific to that funding. Then click the "Search for POs" button to begin the search.

If you are interested in finding a specific PO, choose the "Requisition Number" search option and then enter the number to search for that specific PO.



DIVISION OF BUSINESS SERVICES

Justification to Carry over Prior Year Purchase Order

This application can be used to justify keeping a Purchase Order (PO) open that was created in the previous fiscal year. All POs listed in this application are automatically set to close before the end of the fiscal year unless justified as needing to stay open. Please do not ask to keep POs open that are not specifically needed. Only POs created in the previous fiscal year that are still open will be found in the application. Any PO created in the current fiscal year that is still open at the end of the fiscal year will remain open and does not need to be justified. Grant sub-agreements are exempt from this process and will not be closed until requested by Research Sponsor Programs (RSP).

Please select entry type and enter the whole or partial Department ID/Requisition Number below.

The program will search POs by the department/Requisition with the beginning of your entry.

Select Dept. or Req. #: Department ID
 Requisition Number

Enter Department ID:

Enter all or part of your Department ID to find the POs for your area. In this case, all POs funded on 19XXXX will be returned.

Click the "Search for POs" button to begin your search.

The message "No POs found" (as seen below) will appear if nothing is found. Not every department has POs that require a justification to be carried over. If the "No POs found" message appears, then there are no POs funded by that department that are old enough to require a justification for carryover. All POs created in the current fiscal year do not require a justification to be carried over. Those that remain open at the end of the fiscal year will be able to be spent against and will have any remaining encumbrances carried forward into FY2010.

Select Dept. or Req. #: Department ID
 Requisition Number

Enter Department ID:

No POs found

3. The following screen will show all the POs returned in your search. It lists PO ID, Status, and the remaining PO Balance for each PO returned. The status is initially set to “Close PO” for all the POs in the application. If you do nothing, the status will remain as “Close PO” and these POs will be closed after June 15. The PO Balance lists how much money was left encumbered on the PO as of April 30. **To find out the funding line(s) listed on the PO, click the “Funds” button, to find out the specific line items and all of the other details about the PO, click the “PO Details button.**

To justify leaving the PO open, click “Justify” for the PO ID you wish to keep open.

Justification to Carry over Prior Year Purchase Order

[Return to Search Page](#)

[Export Funding Lines](#)

[Export PO Balances](#)

[About Export F](#)

PO LIST

PO ID	Status	PO Balance	Justify	Funds	PO Details
010K463001	Close PO	\$92.98	Justify	Funds	PO Details
011K561001	Close PO	\$39.26	Justify	Funds	PO Details
012K294001	Close PO	\$77.73	Justify	Funds	PO Details
015K002001	Close PO	\$30.00	Justify	Funds	PO Details
015K816001	Close PO	\$986.97	Justify	Funds	PO Details
017K054001	Close PO	\$38.89	Justify	Funds	PO Details
017K872001	Close PO	\$171.35	Justify	Funds	PO Details
018K152001	Close PO	\$3,870.00	Justify	Funds	PO Details
022K481001	Close PO	\$24.55	Justify	Funds	PO Details
022K956001	Close PO	\$4,997.00	Justify	Funds	PO Details
022K960001	Close PO	\$368.23	Justify	Funds	PO Details
023K995001	Close PO	\$720.00	Justify	Funds	PO Details
024K850001	Close PO	\$2.24	Justify	Funds	PO Details
026K740001	Close PO	\$340.13	Justify	Funds	PO Details

To keep the PO open and justify carrying it over to the next fiscal year, click “Justify”.

For more information on each individual PO, click the “Funds” or “PO Details” buttons.

Clicking the “**Funds**” button shows all the funding detail for that PO, as below:

Business Service
Justification to Carry over Prior Year Purchase Order -
Funding Details for 010K463001

PO ID	Fiscal Year	Fund	Account	Dept ID	Program	Project	Sub-class	Amount
010K463001	2009	136	3105	198040	4	136A169	0762	92.98

[Return to PO List](#) ← Click “**Return to PO List**” to go back.

Clicking the “**PO Details**” button shows all the detail for that PO (such as vendor, ship to, item details, etc.), as below:

Business Service
Order Base

[Return to PO List](#) ← Click “**Return to PO List**” to go back.

Review Requisition #: 010K463 **Vendor #:** 43071

NEWARK ELECTRONICS
 1230 CORPORATE CENTER DR STE 300
 OCONOMOWOC, WI 53066

Agent: VINT QUAMME at (608) 262-1147

Current Order Date: 2/15/2008

Current Order Printed: 2/15/2008

Order Amount: \$1,076.33

Total Paid: \$983.35

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

Pricing Method: NET (NO TRADE DISCOUNT)

Number of Lines: 22 **UDDS:** A198040

Type: PC (REGULAR ORDER - FIRM PRICING)

Print Format Type: CTN (CONFIRMING, NO-PRINT ORIG)

Approval Type: N **Status:** 0

Previous Order#:

Next Order#:

Begin Date: 0/0/0

End Date: 0/0/0

Order Message: CONFIRMING TELEPHONE ORDER.
 DO NOT DUPLICATE ORDER.

Clicking the “Justify” button brings you to the menu below. If you have chosen to keep this PO open, choose the reason to do so from the list or choose “Others” and enter a description if one of the available reasons does not apply. You only need to enter a description if “Others” is chosen as a reason. Click on “Keep PO Open” to have your justification recorded and change the status to Keep Open.

If you change your mind about keeping a PO open, click the “Justify” button in the main list for that PO and then click “Close PO” on the justification screen below. The PO’s status will be returned to “Close PO”.

Business Service

Justification to Carry over Prior Year Purchase Order - Justification Entry for 010K463001

The status of this PO: Close PO

Please select a reason to keep this PO open and then press the "Keep PO Open" push-button:

- Material on back order - still needed
- Materials received - invoice in process
- Return Merchandise Authorization (RMA) pending
- Acceptance testing is pending
- Services/work is not complete
- Others (Please write detailed description below)

Description:

CancelKeep PO OpenClose PO

Choose a reason from the provided list and click “**Keep PO Open**” to justify leaving a PO open.

If you change your mind about keeping the PO open, click Close PO.

To download, view, and sort your data in Excel, click one of the export buttons near the top of the screen.

- The **“Export Funding Lines”** button will export PO funding for the open funding lines associated with each PO from your list. If a PO has more than one line of funding, each funding line and its remaining balance will be listed and the PO number would then appear more than once.
- The **“Export PO Balances”** button will export PO balances for a summary of PO information. Each PO is only listed once with its remaining balance, but no funding information is supplied.

Export each funding line to Excel CSV file

PO ID	Status	PO Balance	Justify	Funds	PO Details
010K463001	Close PO	\$92.98	<input type="button" value="Justify"/>	<input type="button" value="Funds"/>	<input type="button" value="PO Details"/>
011K561001	Close PO	\$39.26	<input type="button" value="Justify"/>	<input type="button" value="Funds"/>	<input type="button" value="PO Details"/>
012K294001	Close PO	\$77.73	<input type="button" value="Justify"/>	<input type="button" value="Funds"/>	<input type="button" value="PO Details"/>
015K002001	Close PO	\$30.00	<input type="button" value="Justify"/>	<input type="button" value="Funds"/>	<input type="button" value="PO Details"/>
015K816001	Close PO	\$986.97	<input type="button" value="Justify"/>	<input type="button" value="Funds"/>	<input type="button" value="PO Details"/>

Choosing “Export Funding Lines” will provide the data in Excel as follows:

	A	B	C	D	E	F	G	H
1	DEPTID	POID	ACCOUNT	FUND	PROGRAM	PROJECTID	SUBCLASS	BALANCE_AMOUNT
2	190100	999B261001	3781	136	6			816.42
3	190200	347H815001	2620	233	0	233FQ75		1966.25
4	190200	999B762001	5713	136	9			23981.5
5	190210	781G760001	3101	101	6	101A805		26.4
6	190300	040K471001	3195	136	6			1233
7	190400	384H915001	3780	133	0	133FU55		3500
8	191200	015K002001	3105	144	4	144QM68		30
9	191200	017K872001	3105	144	4	144QJ56		171.35
10	191200	022K481001	2127	133	4	133KC42		24.55
11	191200	039K896001	3105	144	4	PRJ13CW		5040

Click on "Return to Search Page" to change your search criteria or to search again if desired.

Click on "LOGOUT" in the upper right hand corner to finish.

UNIVERSITY OF WISCONSIN-MADISON LOGOUT

DIVISION OF BUSINESS SERVICES

Justification to Carry over Prior Year Purchase Order

[Return to Search Page](#) [Export Funding Lines](#) [Export PO Balances](#) [About Export Files](#)

Click on "Return to Search Page" to search again or click on "LOGOUT" to finish.

PO LIST

PO ID	Status	PO Balance	Justify	Funds	PO Details
010K463001	Close PO	\$92.98	Justify	Funds	PO Details
011K561001	Close PO	\$39.26	Justify	Funds	PO Details
012K294001	Close PO	\$77.73	Justify	Funds	PO Details
015K002001	Close PO	\$30.00	Justify	Funds	PO Details
015K816001	Close PO	\$986.97	Justify	Funds	PO Details