# 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 http://my.wisc.edu using your NetID and password. Once you are logged in, choose the Services tab. The Requisition and Number Generator module is located on this tab. Click on the text in the 5$^{th}$ bullet, "Justification to carryover prior fiscal year POs" to open the application.

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.

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# 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 deparment/Requisition with the beginning of your entry.

**Select Dept. or Req. #:**  ◉ Department ID    ○ Requisition Number

**Enter Department ID:** | 19 |

[Search for POs]

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:** | 036500 |

No POs found

[Search for POs]

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.**

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## Justification to Carry over Prior Year Purchase Order

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### 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:** O

**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 chose 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 Merchanidise Authorization (RMA) pending
- ◯ Acceptance testing is pending
- ◯ Services/work is not complete
- ◯ Others (Please write detailed description below)

Description:

[ Cancel ]            [ Keep PO Open ]            [ Close 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.

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Click "**Export Funding Lines**" to download, sort, and view the data in Excel.

## Justification to Carry over Prior Year Purchase Order

| Return to Search Page | Export Funding Lines | Export PO Balances | **About Export** |

Export each funding line to Excel CSV file

| PO ID | Status | PO Balance | Justify | Funds | PO Details |
|-------|--------|-----------|---------|-------|-----------|
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| 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 |

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

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| | 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.

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

## Justification to Carry over Prior Year Purchase Order

| Return to Search Page | Export Funding Lines | Export PO Balances | About Export Files |

### PO LIST

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