PROOF REQUISITION PROCESS HAS CHANGED

- IMPORTANT INFORMATION – IF YOU RELIED ON BLANKET ORDERS IN THE PAST, THIS APPLIES TO YOU – ACTION IS REQUIRED IMMEDIATELY.

- ENCLOSED IS A LIST OF BLANKET AND/OR MAINTENANCE PURCHASE ORDERS YOUR DEPARTMENT SUBMITTED LAST YEAR FROM PROOF REQUISITIONS.

- YOU WILL BE USING USHOP TO INITIATE ANY OF THESE ORDERS THAT SHOULD GO FORWARD TO FY2017.

EACH DEPARTMENT PO RENEWAL SUBMITTED BY MAY 31, 2016 WILL QUALIFY THAT DEPARTMENT FOR OUR WEEKLY DRAWING FOR DOUGHNUTS OR BAGELS FOR YOUR OFFICE.

USHop IS ALSO REPLACING:

- PROOF REQUISITIONS/BLANKET ORDERS (DISCONTINUED)
- PAPER-BASED REQUISITIONS (AUGUST ‘16)
- LIMITED PURCHASE ORDERS (SEPTEMBER ‘16)
- PAYMENT REQUEST DIRECT PAYMENTS (OCTOBER ‘16)
- PAYMENT REQUEST REIMBURSEMENTS (NOVEMBER ‘16)
- CAMPUS ORDERS (TBD)

WE WANT TO ASSIST YOUR DEPARTMENT IN MIGRATING YOUR PURCHASING PROCESS INTO USHOP.
STEP 1: GET TRAINED AND GET ANSWERS - FBS.ADMIN.UTAH.EDU/USHOP

P2P (PURCHASING TO PAYMENT) PERSONNEL WILL PLAY THESE ROLES:

- SHOPPER (Training online!)
- REQUISITIONER (Training online or in-person)
- APPROVER (Training online!)
- MANAGEMENT REPORT REVIEWER (Training coming soon)

PROOF REQUISITIONS/RENEWALS WILL REQUIRE AT LEAST ONE REQUISITIONER PER DEPARTMENT
YOU MUST BE A REQUISITIONER TO SUBMIT A USHOP REQUISITION INTO ELECTRONIC APPROVAL WORKFLOW

INTERNAL CONTROLS REQUIRE AT LEAST 2 PERSONS TO COMPLETE THESE 4 ROLES.

IF YOU ARE TRAINED, AND COMFORTABLE WORKING WITHIN USHOP, YOU MAY PROCEED TO STEP 2.
IF NOT, SEE BELOW:

WANT TO KNOW MORE?
ATTEND OPTIONAL INTRO TO P2P WORKSHOP

20 MIN. SUMMARY OF HOW THE PCARD AND USHOP CAN WORK TOGETHER TO SIMPLIFY YOUR PROCUREMENT PROCESSES.

40 MIN. OPEN Q&A TO PROVIDE SUPPORT FOR SPECIFIC QUESTIONS ABOUT PROOF REQUISITIONS.

TWO SESSIONS WILL BE OFFERED EACH DAY:

4/12 – INSCC AUDITORIUM: 10am-11am / 11am-12pm
4/13 – ASB 220: 2pm-3pm / 3pm-4pm
4/19 – HSEB 5100 B: 11am-12pm / 12pm-1pm
4/20 – UNION 323: 1pm-2pm / 2pm-3pm
**STEP 2: DETERMINE WHICH OF YOUR FY2016 PURCHASE ORDERS WILL GO FORWARD TO FY2017.**

- **CONSIDER YOUR P.O. SPREADSHEET (ENCLOSED)**

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<th>Vendor Name</th>
<th>Vendor in UShop?</th>
<th>Org/ID</th>
<th>Ctg Name</th>
<th>Activity</th>
<th>Project</th>
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**Use Renewal form for service or repetitive orders for proof requisitions that should be renewed for FY2017.**

**Orders for “consumables” should be submitted “as needed” and NOT on annual renewal forms – see discussion below.**

**Orders with multiple departmental accounting distributions will require approval by each departmental approver. Upon approval by each department, the requisition will then be processed and a purchase order will be issued.**

**Repetitive "Consumables" orders:**

- Consumables are those supplies or materials which you need periodically, throughout the year, to complete your work.
- Consumables are best ordered on an “as needed” basis, using either one of our punch-out catalogs (below) or the Non-Catalog order form.
- Orders for consumables are most efficient when ordering through our Punch-Out Suppliers.

**Items not available from these suppliers are most efficiently ordered using our Non-Catalog order form.**

**NOTE:** Consumables, supplies, or materials are to be purchased on an “as-needed” basis.
Repetitive "Consumables" orders (cont.):

- UShop functionality provides a "copy requisition to new cart" process for repetitive, timed orders, which can be initiated when you need to replenish your supplies. Outlook reminders can be used to remind you to copy your cart and initiate your new order. **NOTE:** Review supplier pricing before proceeding.

**STEP 3: REVIEW APPROVERS IN GFA**

- Notify GFA approvers that they will receive an email indicating that an approval in UShop is pending.
- Your approvers will need to login to UShop to approve your Renewal requests.
- Approvers should view online Approver Training:
  - [http://fbs.admin.utah.edu/ushop/ushop-training](http://fbs.admin.utah.edu/ushop/ushop-training)
1) The PO Renewal form is to be used for orders you anticipate repeating each fiscal year. It is located on the UShop home shopping page in the uRequests section.
2) The first field on the form, Enter Supplier, is required. Start typing the name of your supplier here.

3) If the supplier is already enabled in UShop, the name of your supplier will auto populate – select the correct vendor name.

4) If the supplier is not yet in UShop, type the words New Supplier in this field.

- You may provide the New Supplier Details in the fields provided.
- You may also search for the supplier in CIS by clicking on the Vendor Search link above and following the prompts.

- In the Additional Details section, you may provide information for the supplier that you did not include in the Product Description (see next page). An example would be a delivery name and contact number pertaining to the order.
5) The information typed in the Product Description field will be seen on the Purchase Order as one line item. Please include:

- A clear description of what you want to buy.
- The beginning and end dates of the order
- Service or Billing frequency
- Any other details such as equipment serial numbers, etc.

6) Quantity

- Type “1” if you are considering this order as one job for the whole year. In this case, you will indicate the total Estimated Line Unit Price for the whole order.
- You may choose to indicate quantity based on the number of deliveries/service calls, and you will indicate the Estimated Line Unit Price as the cost for one delivery/service call. **SEE EXAMPLES ON PAGE 14**

7) Even though you have added the dates in the Product Description, please indicate the Service Start and End dates here as well.

8) The Product Health & Safety Disclosures section is required.
- If you have no disclosures to declare, click No.
- If you click Yes, check the boxes below to give details.
9) In the Purchasing Department Details section, provide pertinent information about this order, such as, is there currently a Contract in place? Does this order require a competitive Bid or Sole Source approval? Please attach all applicable documents. However, **do not attach documents that are considered confidential or of a sensitive nature.** Contact the Purchasing Department regarding the most appropriate methods for including confidential or sensitive documents.

10) To attach documents intended for the Purchasing Department or other UShop users, click on the Add Attachments button under Internal Attachments. Keep in mind that Internal Attachments can be seen by all UShop users, while External Attachments can be seen by all UShop users as well as the supplier.
11) As you prepare orders for the fiscal new year, you will need to edit the Accounting Date. To do this, when your cart is ready to go, click on Proceed to Checkout.

12) Click on the Billing tab, then on the Edit link.

13) The first billing option is Accounting Date. For new fiscal year orders, select “July 1” of the current year and click Save. General Accounting has now opened accounting periods for four months following the current month.

- When the order is complete and ready to submit, the requisitioner must click “Submit Requisition.”
STEP 5: VERIFY YOUR RENEWAL PURCHASE ORDERS

1) On the left toolbar on the UShop Marketplace home shopping page, hover over the Orders and Documents icon, and select Search Documents.

2) Click on the Advanced Search link located under the Simple Search engine.
3) On the Advanced Search page, select *Requisitions* as your document type. Scroll down to *Form Type* and click on the spyglass.

4) Select the Form Type *PO Renewal* and click *Add*.
5) Scroll down to the *Custom Fields* section and add your *Org ID*, or other applicable search criteria to filter your search. Click *Go*.

6) This will generate a list of all of the requisitions for your Renewal POs. You may compare this list to the Proof Requisition list provided in this packet to ensure you have addressed each of them. You may modify the Date on your search to view the requisitions for the Renewal POs of a specific year.
In the future as the next fiscal year end approaches, you will not receive a list of Renewal POs. You may generate your own list by following the steps outlined above (Step 5) and modifying the date either by adding a Custom Date Range or by selecting the appropriate Fiscal Year option. Identify the orders to be renewed, and copy the previous year’s requisition to a new cart. Then you may rename the cart, edit quantities, etc. as needed, add current accounting information, and submit your new order for the coming year!

For detailed instructions on copying a requisition to a new cart, see the Training Materials on the UShop Marketplace home shopping page – fbs.admin.utah.edu/ushop

Accounting periods are now open for the four months following the current month to allow UShop users to submit orders well in advance.

This means that as early as the 8th business day of March, 2016 you may indicate July 1, 2016 as the Accounting Date under Billing Options on your UShop orders.

FBS will remind users when it is appropriate to prepare your PO renewals in future years.
EXAMPLES OF COMMON RENEWALS

1) SERVICE FOR ONE JOB TO BE DELIVERED OVER A PERIOD OF TIME

Fill in the purchase details in the fields below. Fields shown in bold are required. Include the service description, beginning and ending service dates, and any other details (equipment serial numbers, etc.) relating to this Purchase Order request. *NOTE: The Product Description will appear on the PO as a line item.

Product Description

Consulting Services for XXXX Project. Project to run from 08/01/2016 to 02/15/2017. Specific requirements and expectations of service attached.

Quantity

Estimated Line Price

10000.00

Service Start Date

08/01/2016

Service End Date

02/15/2017
2) GOODS DELIVERED ON A REGULAR BASIS

Fill in the purchase details in the fields below. Fields shown in **bold** are required. Include the service description, beginning and ending service dates, and any other details (equipment serial numbers, etc) relating to this Purchase Order request. *NOTE: The Product Description will appear on the PO as a line item.

**Product Description**
Bottled water to be delivered once monthly from July 1, 2016 to June 30, 2017.

**Quantity**
Estimated Line Unit Price
12
75.00

Enter the service start and end dates. *NOTE: these dates are for your reference only and do not print on the PO.*

**Service Start Date**
7/1/2016
mm/dd/yyyy

**Service End Date**
6/30/2017
mm/dd/yyyy
3) SERVICE PROVIDED ON A REGULAR BASIS

**Copier maintenance to occur once quarterly from July 1, 2016 to June 30, 2017. Maintenance service expected to occur February, May, August and November.**

**Quantity**

| Estimated Line Unit Price | 100.00 |

Enter the service start and end dates below. **NOTE: these dates are for your reference only and do not print on the PO.**

**Service Start Date**

7/1/2016

**Service End Date**

6/30/2017