

As the fiscal year comes to a close, you will want to identify your Renewal POs to re-submit them for the new fiscal year. It is easy to generate a list of your renewal orders by utilizing the search function in UShop.

**Before you begin, answer these questions to determine whether your order is suitable for the PO Renewal:**

- Is the order for annual or regularly scheduled services?
- Is there a contract or service agreement in place?
- Are the contract dates still valid?

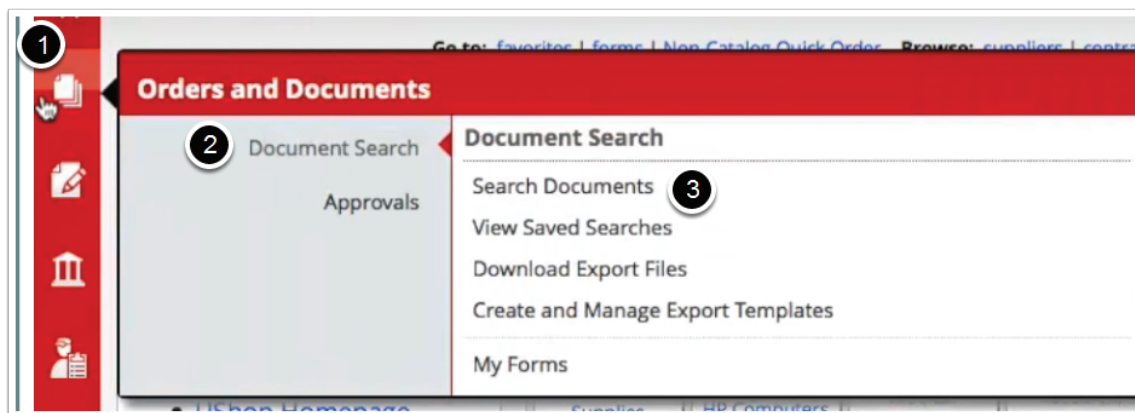
If the answer to any of the above is “no”, **please contact the Purchasing Department** to discuss the possible use of the PO Renewal.

**Some examples of orders to place on the PO Renewal:**

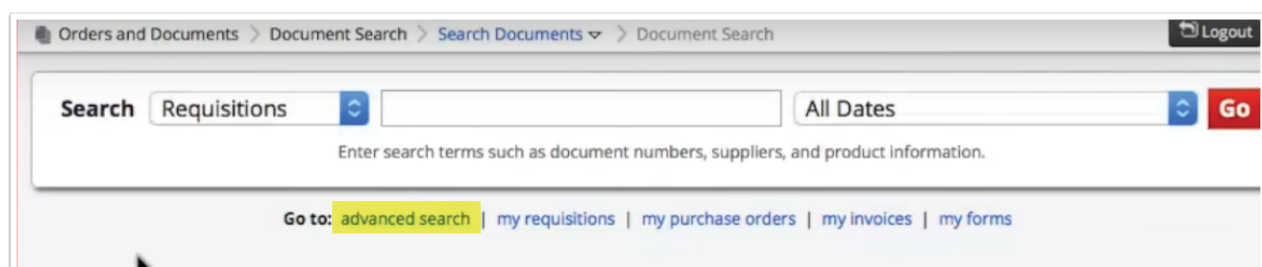
- Equipment service agreements, such as a copier maintenance agreement
- Low dollar/high frequency orders, such as bottled water delivery

### 1. To search for your prior Renewal POs, go to the left tool bar on the UShop shopping dashboard.

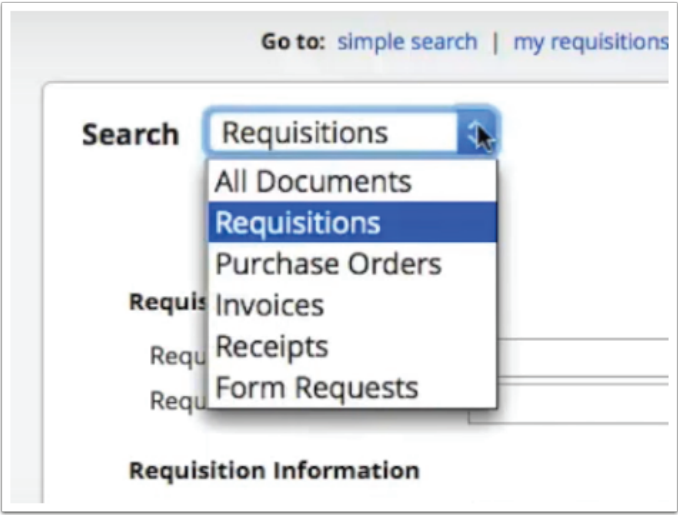
Hover over the Orders and Documents icon and Document Search, then select Search Document.



### 2. Click on the advanced search link, located under the simple search engine.



3. On the advanced search page, select Requisitions as the document type.



4. Scroll down to Form Type and click on the spyglass.


**Search** Requisitions ▾ simple search


**Requisition Identification**


Requisition Number(s)


Requisition Name

**Requisition Information**

Participant(s) ☒ Any ☐ Me ☐ Pick...  


Shopper  

Requisitioner  

Approved By  

Date  ▾  ▾


Total Amount  ▾

Supplier  


**Item/Product Information**



Catalog Number(SKU)

Product Description

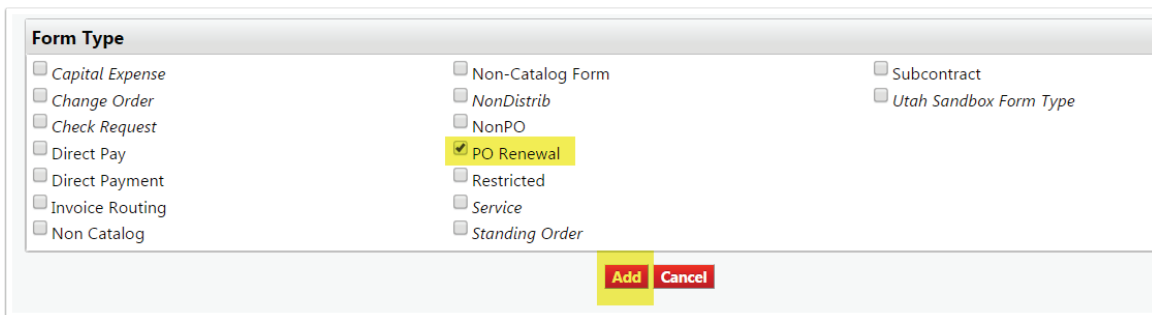
Commodity Code  

Form Name

**Form Type**  

Product Flags ☐  Controlled substance ☐  Energy Star

## 5. Select the Form Type PO Renewal, and click Add.

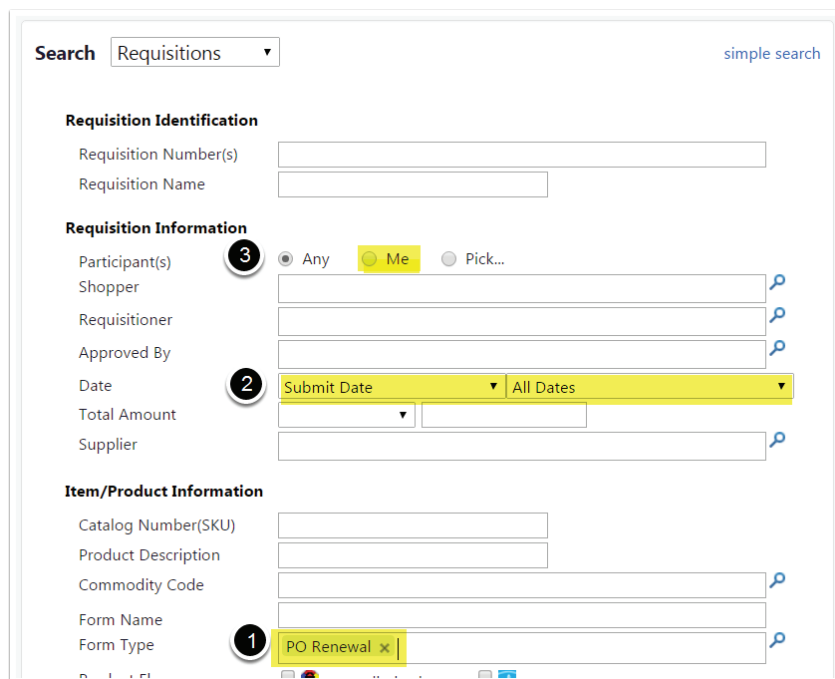


The 'Form Type' dialog box displays a grid of checkboxes for various form types. The 'PO Renewal' option is selected and highlighted with a yellow background. At the bottom right, there are 'Add' and 'Cancel' buttons.

Form Type		
<input type="checkbox"/> Capital Expense	<input type="checkbox"/> Non-Catalog Form	<input type="checkbox"/> Subcontract
<input type="checkbox"/> Change Order	<input type="checkbox"/> NonDistrib	<input type="checkbox"/> Utah Sandbox Form Type
<input type="checkbox"/> Check Request	<input type="checkbox"/> NonPO	
<input type="checkbox"/> Direct Pay	<input checked="" type="checkbox"/> PO Renewal	
<input type="checkbox"/> Direct Payment	<input type="checkbox"/> Restricted	
<input type="checkbox"/> Invoice Routing	<input type="checkbox"/> Service	
<input type="checkbox"/> Non Catalog	<input type="checkbox"/> Standing Order	

**Add** **Cancel**

1. This Form Type is now added to your search criteria.
2. You may also choose to add a date range to view the renewal POs for a specific year.
3. If you initiated each of the prior Renewal POs, you may add the criterion that you are a participant by clicking "Me".



The 'Search Requisitions' dialog box shows various search criteria. The 'Form Type' is set to 'PO Renewal'. The 'Date' field is set to 'Submit Date' and 'All Dates'. The 'Participant(s)' field is set to 'Me'. The 'Form Name' field is set to 'PO Renewal'.

**Search** Requisitions simple search

**Requisition Identification**

Requisition Number(s)

Requisition Name

**Requisition Information**

Participant(s) **3** ☒ Any ☒ Me ☐ Pick...

Shopper

Requisitioner

Approved By

Date **2**  Submit Date  All Dates

Total Amount

Supplier

**Item/Product Information**

Catalog Number(SKU)

Product Description

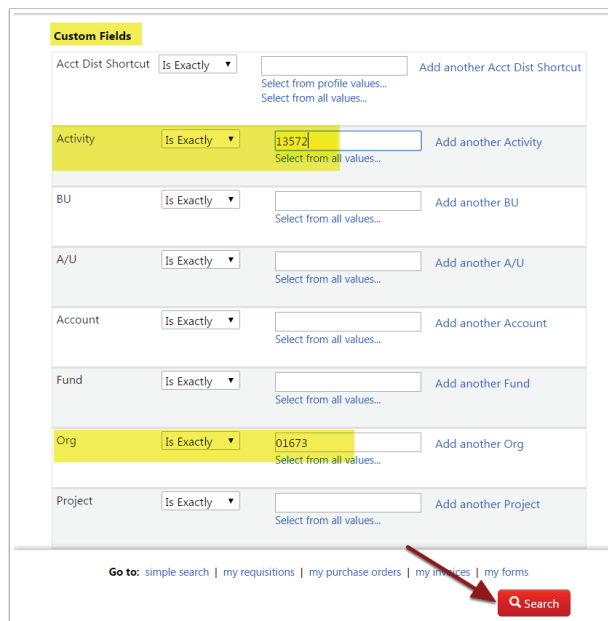
Commodity Code

Form Name

Form Type **1**  PO Renewal

## 6. Scroll down to Custom Fields.

Add your activity number, Org ID, or other appropriate criteria to filter your search. Click Search.



The 'Custom Fields' dialog box shows various search criteria. The 'Activity' field is set to 'Is Exactly' and '13572'. The 'Org' field is set to 'Is Exactly' and '01673'. The 'Search' button is highlighted with a red arrow.

**Custom Fields**

Acct Dist Shortcut  Is Exactly  Add another Acct Dist Shortcut

Activity  Is Exactly  13572 Add another Activity

BU  Is Exactly  Add another BU

A/U  Is Exactly  Add another A/U

Account  Is Exactly  Add another Account

Fund  Is Exactly  Add another Fund

Org  Is Exactly  01673 Add another Org

Project  Is Exactly  Add another Project

**Go to:** [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#) | [my forms](#)

**Search**

7. This will generate a list of all the requisitions for your Renewal POs.

You may use this list to renew orders for the new year. You may copy each requisiton to a new cart.

Orders and Documents > Document Search > Search Documents > Document Search

Logout

Back to Edit Search | Start New Search

Showing 1 - 1 of 1 Results

All Dates

Results Per Page: 20 | Sort by: Best match | Page 1 of 1

Search Details

Filtered by

Type: Requisitions

Date Type: Submit Date

Date Range: All Dates

[remove all]

Activity

Is Exactly: 13572

Form Type

PO Renewal

Requisition No.	Supplier(s)	Requisition Name	Shopper	Requisition Date/Time	Requisition Total
72673590	New Supplier	2016-03-21 u0459686 01	Jake O'Connor	4/14/2016 12:15 PM	1,200.00 USD

8. For detailed instruction on how to copy a requisition to a new cart, go to the Training Materials link found on the Shopping dashboard.

IES

rial

ies

g (up to \$5,000)

Request a Payment

Central Administration Payments

NoPO

Payment Request

My Resources

Campus Information Services (CIS)

Grant Financial Authority (GFA)

Training Materials

Voucher Lookup

Invoice Lookup (Fortis Web)

PCard Only Supplier List

Buying & Payment Guide

Org Message

UShop HELP DESK

5-CALL

UShop Quick Links

Open My Active Shopping Cart

View My Orders (Last 90 Days)

My Recent Approvals

Approval Notifications

View My Favorites

Action Items

9. In the Shopping section, select Copy Requisition to a new Cart.

Shopping

Accounting Distribution – Add Split (PDF)

Add Comment (PDF)

Bid Request (PDF)

Billing Options (PDF)

Change Shopper name (PDF)

Change Supplier on a PO (PDF)

Compare Hosted Punchout Items (Video)

Copy Requisition to a new cart (Video)

How to Save/Print a PO (for manual distribution) (PDF)

Level 2 Punchout (Video)

Manual Distribution PO, Selecting the Option (PDF)

Move Items to Another Cart (PDF)

New Supplier Request (PDF)

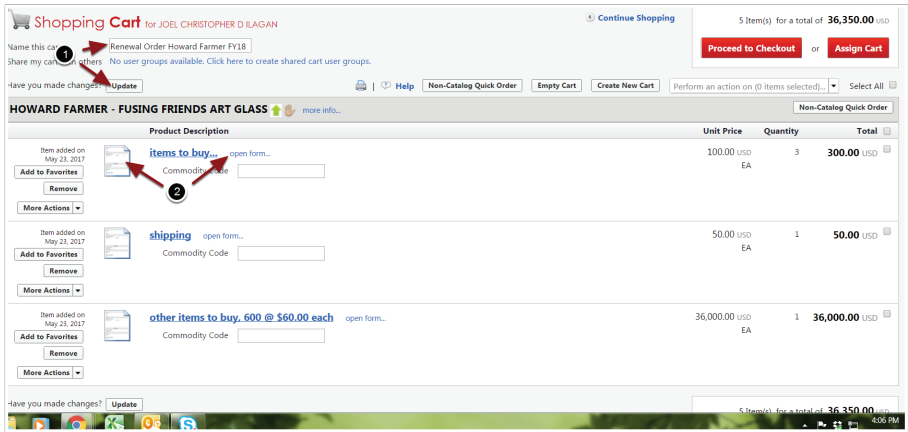
Non-Catalog Existing Supplier (PDF)

P-Card Purchase only

PO Renewal Request

10. When your items have been copied to a new cart, you may edit the contents as needed.

1. Rename the cart to reflect the new order. Click Update.
2. To open the form for editing, click on either the form icon or the "open form" link



11. Edit the form to reflect any changes in the new order.

With the form open you may edit the Product Description, Quantity, or Estimated Line Unit Price as needed.

Purchase Details

Fill in the product details for the purchase in the fields below. Fields shown in **bold** are required.

\*NOTE: The Product Description will appear on the PO as a line item.

Product Description

items to buy...

239 characters remaining expand | clear

Quantity

3

Estimated Line Unit Price

100.00

Catalog No.

Packaging (UOM)

EA - Each

**12. When your edits are completed, scroll up to Available Actions.**  
**Click GO to save your changes, then click Close.**



Available Actions: Save ▼ Go Close

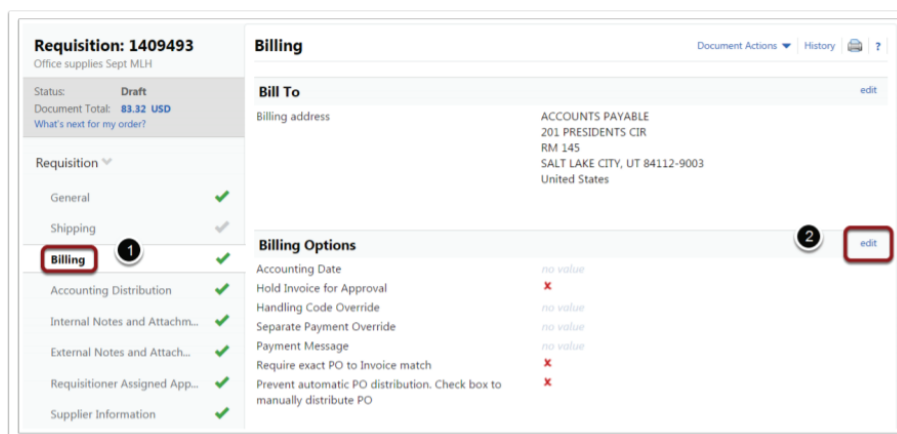
**13. Indicate future accounting date, if needed.**

If your order is to be funded with new year funds and you are submitting the order prior to the beginning of the new year, you may choose to modify the accounting date.

On the Checkout page:

1. Click on the "Billing" tab, then
2. Click on the "edit" link to the right of "Billing Options".

This will open the available Billing Options for selection.



**Requisition: 1409493**  
Office supplies Sept MLH

Status: **Draft**  
Document Total: **\$3.32 USD**  
[What's next for my order?](#)

Requisition ▼

- General ✓
- Shipping ✓
- Billing 1** ✓
- Accounting Distribution ✓
- Internal Notes and Attachm... ✓
- External Notes and Attach... ✓
- Requisitioner Assigned App... ✓
- Supplier Information ✓

**Billing** Document Actions History ?

**Bill To** edit

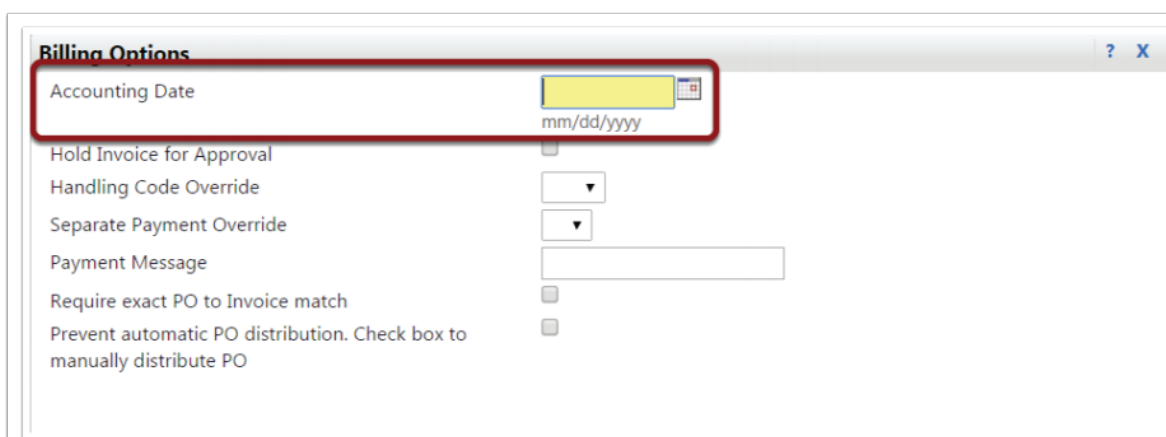
Billing address

ACCOUNTS PAYABLE  
201 PRESIDENTS CIR  
RM 145  
SALT LAKE CITY, UT 84112-9003  
United States

**Billing Options** 2 edit

Accounting Date	no value
Hold Invoice for Approval	✗
Handling Code Override	no value
Separate Payment Override	no value
Payment Message	no value
Require exact PO to Invoice match	✗
Prevent automatic PO distribution. Check box to manually distribute PO	✗

The Accounting Date will default to the date on which you place the order. This is appropriate for most orders. If you need to select a date during a different open accounting period, you may do it here by using the calendar link or simply typing the date in the field provided. Accounting periods are open for expenditures for the current month and four months following the current month



**Billing Options** ? X

Accounting Date mm/dd/yyyy

Hold Invoice for Approval ☐

Handling Code Override ▼

Separate Payment Override ▼

Payment Message

Require exact PO to Invoice match ☐

Prevent automatic PO distribution. Check box to manually distribute PO ☐