





Searching, Reporting and Year End in UShop

Each user has the ability to use the UShop system to search for items, transactions and more. As well as for creating reports for the department. The year end processing experience can be improved by using these tools.

- To set **Columns** use the *Wheel/bolt* Icon 
- To select **Filters** use the *Add Filter* drop down 
- To export as a report in Excel click the *Export All* drop down 
- More detailed help is found in the [How to set Filters and Columns Defaults](#) help guide

This tool is especially helpful at year end when all open PO's, within your responsibility, are reviewed in early May so there is time to work with the supplier and Accounts Payable to have the supplier paid in a timely manner and in the expected fiscal year in your accounts.

 **Tips:** Choose **Columns** that contain *Matching Status*, *AP Status* and *Invoice Pay Status*. Apply **Filters** for *Org*, *Activity*, *Project* and/ or *Participant* depending on your scope of responsibility. Add the **Filters** for *AP Status* and choose Open. Considering refining the *Create Date* if appropriate.

This will produce a list of PO's which should be reviewed to determine if action needs to be taken by the department and or to communicate with the supplier and/or AP.

- If all expected invoices have been both processed and paid in full then it would be wise to *Close the PO* (See [Requisitioner Training](#) page 31 for How to Close a PO). Note that closing the PO will disencumber any remaining dollars.
- If the department has an *Invoice* that needs to be sent to AP then choose one of the options below to send the invoice to AP:
 - a) Email the Invoice to ap@admin.utah.edu with the PO number on it.
 - b) Use the [Invoice Submission Form](#)
- If the supplier has an *Invoice* that needs to be sent to AP then ask them to send the Invoice to ap@admin.utah.edu and make sure the PO number is on the *Invoice*.
- Determine if any other action ought to be taken regarding the open PO.