CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Quick Reference Guide
Fiscal Year-End Process
End-Users

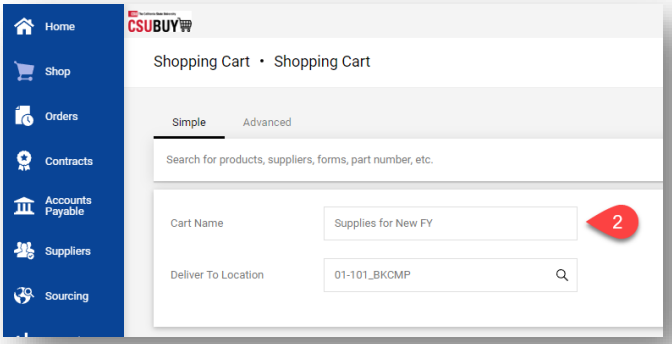
Learn the CSUBUY Global Fiscal Year-End (FYE) Process and how an end-user can prepare and process requisitions during this time. Below are some key notes about the Global Fiscal Year-End process:

- The **Global Fiscal Year-End** time period commonly starts the first Monday of May to July 2ND.
- During this period, all requisitions will be routed for Procurement Review to confirm which fiscal year the requisitions should be recorded.
- When creating a requisition in the current Fiscal Year-End for the new Fiscal Year, the **Accounting Date** field should be populated.
- Only active chartfields will be available in CSUBUY. Any new fiscal year chartfields (chartfields active in July) will not be available in CSUBUY until that time.

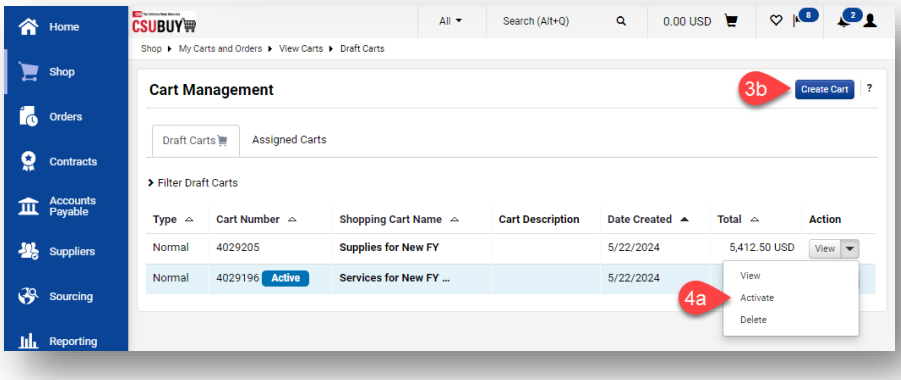
Preparing Requisitions Ahead of New Year via Draft Carts

End-users can prepare draft requisition(s) in preparation for the new fiscal year and submit on/after July 1st. The following steps detail how to create/save draft carts and submit in the new fiscal year.

1. Add items to create your cart.
2. In the cart view, it is recommended to name your cart by completing the **Cart Name** field. CSUBUY will automatically save the cart as a draft cart.



3. To access your **Draft Carts** or **Create a New Cart**: On the left-hand navigation, navigate to **Shop > My Carts and Orders > View Carts**.
    a. You will land on **Cart Management** where all available draft carts are, including the active one.
    b. You can also create a new cart by clicking the **Create Cart** button.

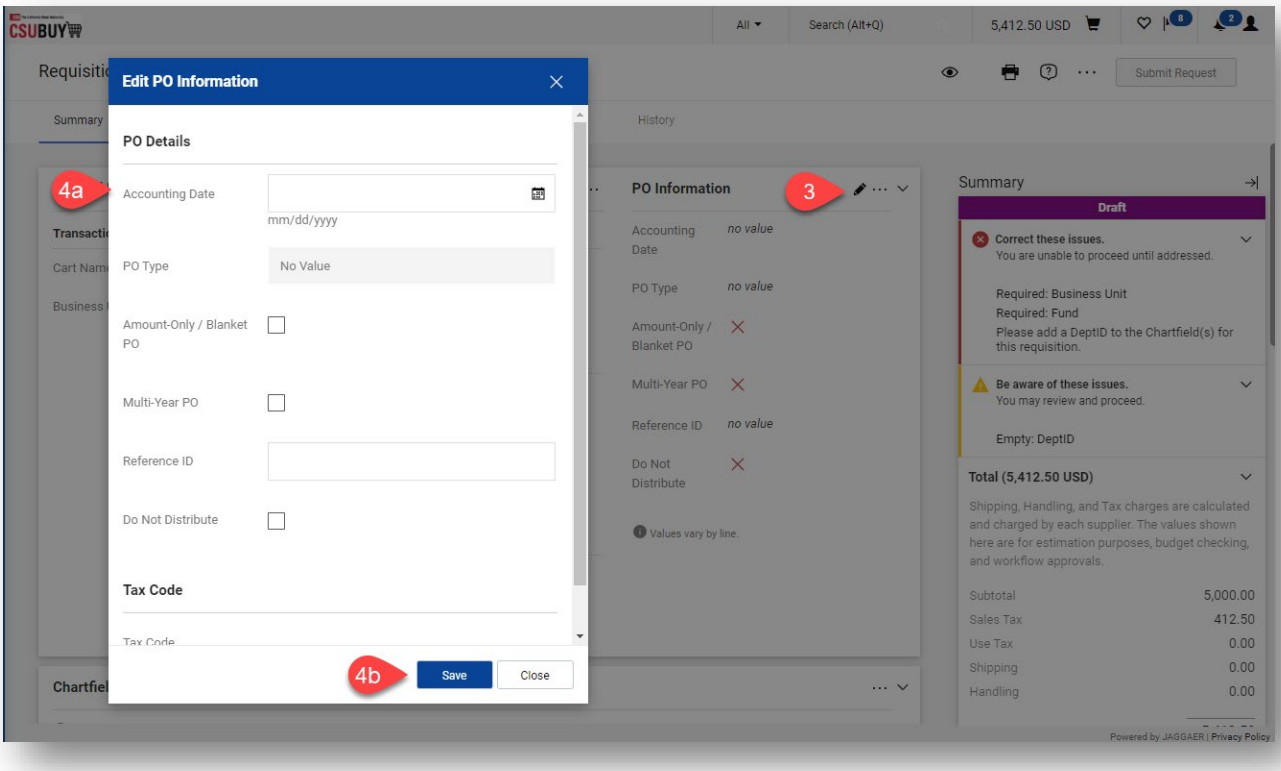


4. On or after July 1st, you can begin submitting your requisitions by:
    a. Click on the drop down arrow under **Action** for the cart you want to submit and select **Activate**.
    b. The row will then show that it is the active cart with the blue **Active Icon**.
    c. Click **View** to take you to the cart where you can **Proceed to Checkout** and **Submit**.
        i. Note: only current active chartfields will be available. If it is a new FY chartfield, it will not be available in CSUBUY until that time (in July).

CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Quick Reference Guide
Fiscal Year-End Process
End-Users

Submitting Requisition During FYE

End-users can continue to submit requisitions during fiscal year-end and utilize the accounting date to determine which fiscal year the requisitions should take place in.

1. Add items to create your cart.
   a. If you are submitting a requisition that includes a **Period of Performance**, ensure that you populate these fields on the form. This will help Procurement determine the fiscal year for the requisitions.
   b. Also recommended to name your cart.
2. Navigate to the checkout screen by clicking on **Proceed to Checkout**.
3. In the **PO (Purchase Order) Information** area of the Requisition, click the **pencil icon** to edit fields in this section.
4. The Edit PO Information screen will appear for you to:
   a. Update the **Accounting Date** field appropriately. **Note**: It is recommended to consult with your Campus Procurement Teams to determine the accounting date and/or processing options for the requisition. Comments can be utilized as a form of communication.
      i. Current Fiscal Year Requisition, populate the Accounting Date with the current date (May or June).
      ii. New Fiscal Year Requisition, populate the Accounting Date with a July 1st date or later (July).
   b. Click **Save**
5. Submit the Requisition.