


Checkout Quick Guide for Early Ordering FY 2020

STEP	FIELD	FORMAT
#1	▲ Requisition Description	FY 2020 Description
	▲ Need-By-Date	07/31/2019
	▲ General Ledger (GL) Date	07/01/2019
	▲ Charge Account	Full account string + activity code if used
#2	▲ Justification	6-digit Account # + Account Name
	▲ Note to Buyer	FY 2020 + New Supplier Info
#3	▲ Submit to Approver	😊

FY 2020 Account Approver Guidelines

STEP		
#1	<ul style="list-style-type: none"> ▲ Open Requisition from Worklist 	<div style="border: 1px solid gray; padding: 5px; display: inline-block;">Worklist</div>
#2	<ul style="list-style-type: none"> ▲ Note the Justification field and the charge account name/number—is it appropriate for the items being purchased? 	<div style="border: 1px solid gray; padding: 5px; display: inline-block;">Justification 503003 (Instructional Materials)</div>
#3	<ul style="list-style-type: none"> ▲ Click on the attachment that includes <requisition number><details>.html and open the file 	<div style="border: 1px solid gray; padding: 5px; display: inline-block;">Attachments 206499details.html</div> <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-left: 10px;">Open</div>
#4	<ul style="list-style-type: none"> ▲ Under Account Number column, verify that the account listed is appropriate and the same that was indicated in the account Justification field. 	<div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-bottom: 10px;">Account Number</div> <div style="border: 1px solid gray; padding: 5px; display: inline-block;">01-04201-201-04-503003-000000-0000</div>
#5	<ul style="list-style-type: none"> ▲ Under the Period column, verify that the fiscal year is correct. (E.g.: for a GL date of July 1, 2019, the correct FY period is JUL 20.) 	<div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-right: 20px;">PERIOD</div> <div style="border: 1px solid gray; padding: 5px; display: inline-block;">JUL-20</div>
#6	<ul style="list-style-type: none"> ▲ Use the back arrow to return to the approval screen. 	
#7	<ul style="list-style-type: none"> ▲ Select appropriate action. If either the account number or period are incorrect, REJECT the requisition. 	<div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-right: 5px;">Approve</div> <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-right: 5px;">Reject</div> <div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-right: 5px;">Reassign</div> <div style="border: 1px solid gray; padding: 5px; display: inline-block;">Request Information</div>