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ASCENDER - Next Year Purchasing Checklist

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The purpose of this document is to guide you through the necessary steps to create and manage next year requisitions.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

☐	1. Use the following Budget pages to begin managing next year Purchasing: • Budget > Utilities > Copy Current to New File ID • Budget > Utilities > Reinitialize Budget Data • Budget > Utilities > Mass Change Account Codes > Fund/Year • Budget > Utilities > Mass Change Account Codes > Mask Crosswalk • Budget > Utilities > Delete by File ID • Budget > Utilities > Clear/Move NYR Requisitions to CYR
☐	2. In District Administration, visit the following pages: • District Administration > Utilities > Mass Update User Accounts By Fund • District Administration > Options > Purchasing/Warehouse > Next Year • District Administration > Maintenance > User Profiles > Accounts
☐	3. On the Finance > Tables > District Finance Options > Finance Options page: Under **Purchasing Options**, review the following fields and update as needed. • **Use Automatic NYR PO Number Assignment** • **Use Automatic NYR Requisition Number Assignment**
☐	4. In Purchasing, visit the following pages: • Purchasing > Next Year > Maintenance > Create/Modify Requisition • Purchasing > Next Year > Maintenance > Approve Requisition • Purchasing > Next Year > Maintenance > Reverse Purchase Order • Purchasing > Next Year > Maintenance > Requisition Status Inquiry

☐	5. Finance > Utilities > Fiscal Year Processing > Clear/Move NYR Requisitions to CYR `OR` Budget > Utilities > Clear/Move NYR Requisitions to CYR
☐	6. Print the following reports to verify information: **Finance** • Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1400 - Detail General Ledger • Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1600 - Batch Process Balance Error Listing • Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2150 - Outstanding Purchase Orders **Purchasing** **Note**: The following reports include a **Next Year** option. • Purchasing > Reports > Purchasing Reports > REQ1000 - Requisition Log (Summary) • Purchasing > Reports > Purchasing Reports > REQ1050 - Requisitions Pending Approval • Purchasing > Reports > Purchasing Reports > REQ1100 - Outstanding Requisitions Report • Purchasing > Reports > Purchasing Reports > REQ1150 - Requisition Status Report • Purchasing > Reports > Purchasing Reports > REQ1200 - Requisition Returned/Disapproved Report • Purchasing > Reports > Purchase Order Reports > REQ1300 - Purchase Order Log • Purchasing > Reports > Purchase Order Reports > REQ1350 - Outstanding Purchase Orders Report • Purchasing > Reports > Purchase Order Reports > REQ1400 - Open PO Report

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