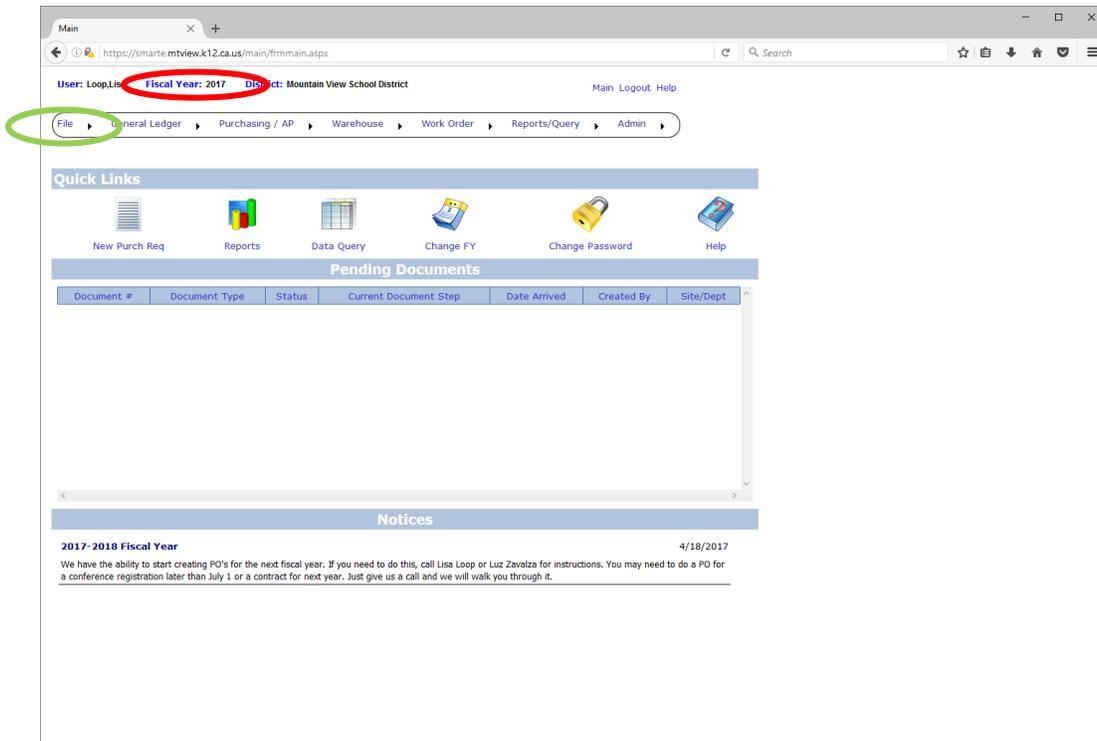## Smarte Tools Instructions for Changing Fiscal Years

It is important to realize that in SmarteTools, you can do work in two fiscal years at once. Our current year is 2016/2017. However, if you want to set up a Purchase Requisition for a contract or activity or even something that will be delivered after July 1, 2017, you can do it NOW!
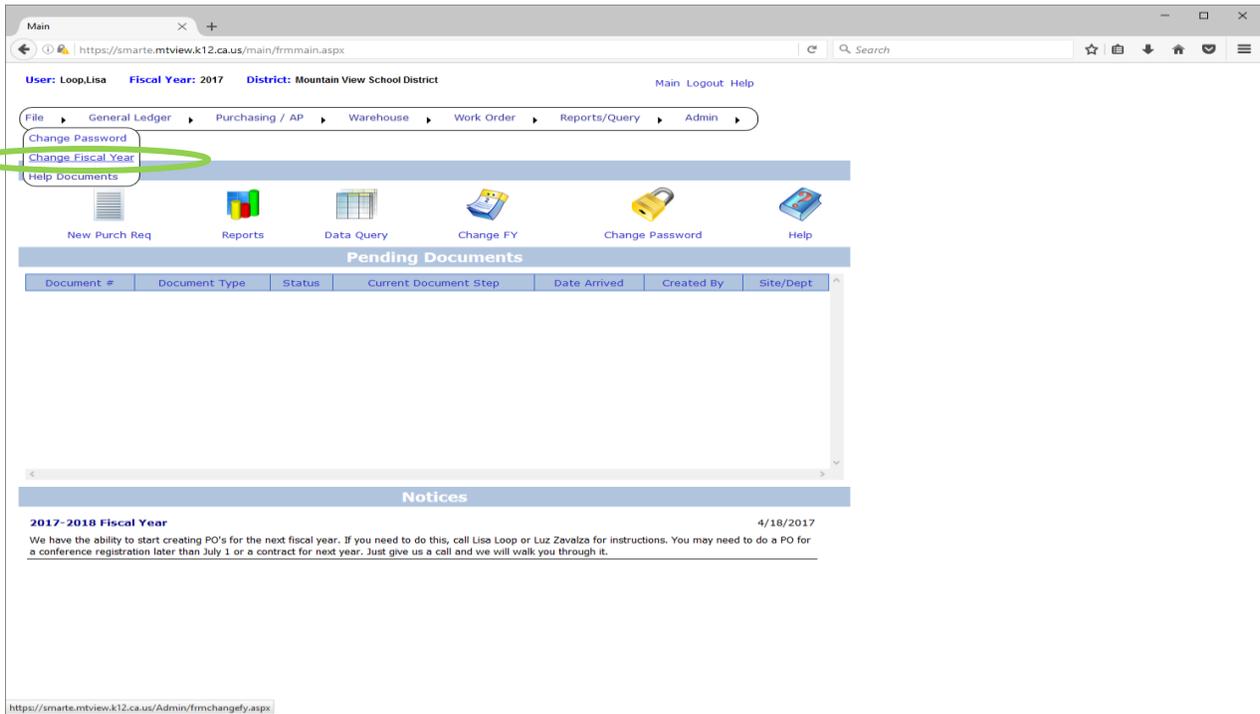
Please follow the instructions below or call for a quick walk through. In Peoplesoft you had to wait until July 1 but with Smarte Tools you can get a jump on the new year.

1. Change the Fiscal Year. The Red Circle shows the current Fiscal Year is 2017. That is the 16/17 Fiscal Year which will be over on June 30, 2017.
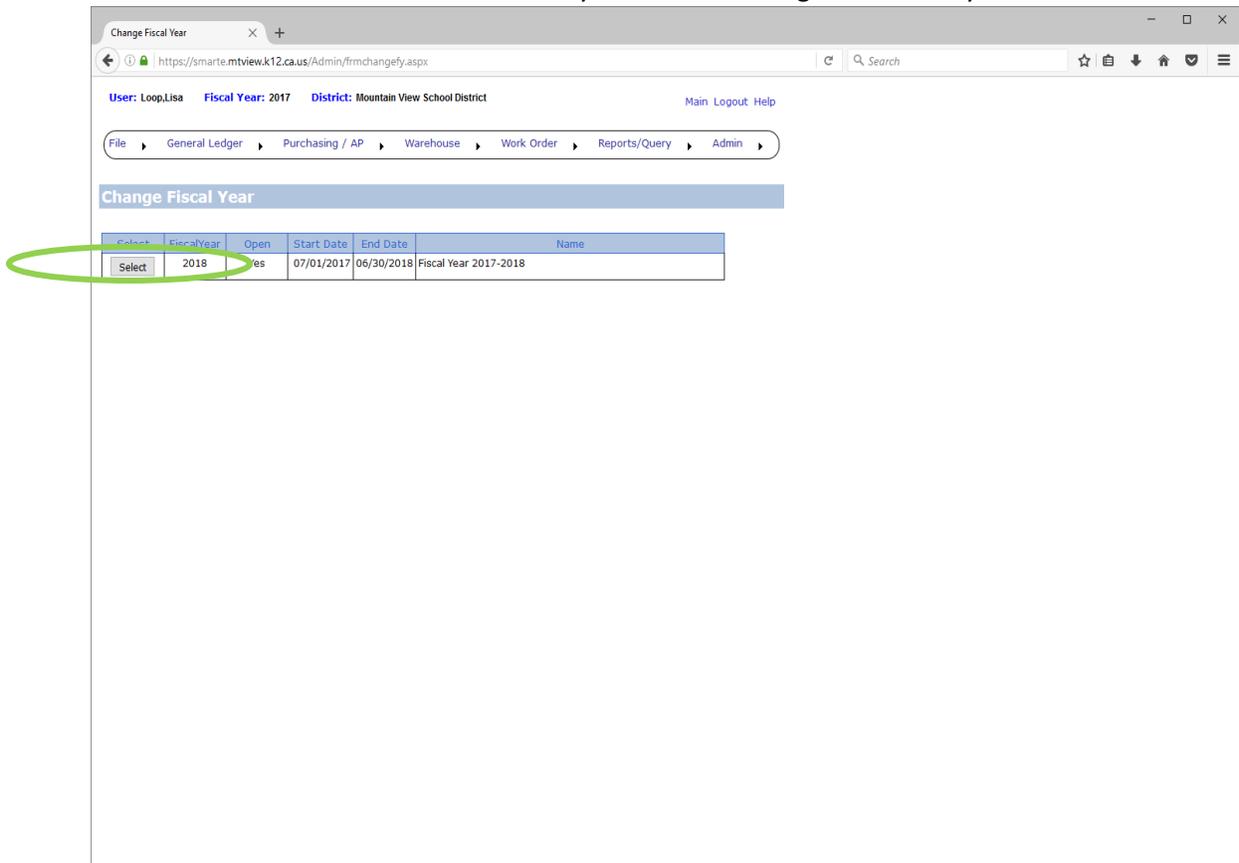

2. Now look at the Green Circle. This is where you can change the fiscal year. Hover over the File Heading and you will see the options on the next page.

3. Select Change Fiscal Year. Click.

4. Click the Select Button next to 2018 and you will have changed the Fiscal year to 2018.

You can see the Fiscal Year has changed to 2018 right here.

5. Now you can do any Purchase Requisitions you want for the 2017/2018 Fiscal Year in 2018.
6. Don't forget to follow the same instructions to switch back to 2017 if you need to look at reports or do PO's for 2016/2017 (FY 2017).
7. You will be able to go back and forth between these two fiscal years until we Close the Books on the 2016/2017 Fiscal Year, or eliminate that function for certain users to make sure you don't make an error.

Call or email us if you have any questions!

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