

Updating your Fiscal Year in Favorites

After the start of a new fiscal year, it is important to remember to update your fiscal year in Jaggaer. This allows all of your requisitions to prefill with the correct fiscal year without manually changing. All requisitions submitted with the previous fiscal year will go into a hold folder where the purchasing team will review on a case by case basis. If you do not use favorite account codes, you will not need to update this information. If you have any questions regarding this process, please contact our team at purchasing@plattsburgh.edu or 518-564-3606.

1. The first step is to get to your profile in Jaggaer. To do so, click on the person icon in the top right corner of the screen and then select *View My Profile*.

The screenshot displays the Jaggaer System Admin Dashboard for Mitchell Guanga. The top navigation bar includes the State University of New York Plattsburgh logo, a search bar, currency (0.00 USD), and a user profile icon. The user profile icon is highlighted with a red box, and a dropdown menu is open, showing the 'View My Profile' option. The dashboard content area is divided into four main sections: 'Users w/o Departments' (green header), 'State PO - Phase 1 Errors' (orange header), 'State Requisition - Errors' (blue header), and 'State PO - Phase 2 Errors' (orange header). Each section contains a message indicating no search results. The bottom of the dashboard shows summary statistics: 'Total Requisitions: 99', 'Approx. Total Amount: 405,919.08 USD', and 'Total Purchase Orders: 1'.

STATE UNIVERSITY OF NEW YORK
PLATTSBURGH

Dashboards • System Admin Dashboard

< System Admin Dashboard

Users w/o Departments

There are no search results to display for this Users search.

State PO - Phase 1 Errors

There are no search results to display for this Purchase Order search.

State Requisition - Errors

Total Requisitions: 99

Approx. Total Amount: 405,919.08 USD

State PO - Phase 2 Errors

Total Purchase Orders: 1

Mitchell Guanga

View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

Search Help For A Solution

My Recently Completed Requisitions

My Recently Completed Purchase Orders

Logout

- Next, you will look on the left side of the screen for the *Default User Settings* list and then select *Custom Field and Accounting Code Defaults*.

STATE UNIVERSITY OF NEW YORK
PLATTSBURGH

My Profile ▶ User's Name, Phone Number, Email, etc.

Mitchell Guanga

User Name PLA-MGUAN002

- User Profile and Preferences <
- User's Name, Phone Number, Email, etc.**
- Language, Time Zone and Display Settings
- Early Access Participation
- Default User Settings <**
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Checkout Settings
- Payment Options
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

User's Name, Phone Number, Email, etc.

First Name	Mitchell
Last Name	Guanga
Phone Number	<input type="text" value="+1 518-564-4606"/> <small>ext.</small> <input type="text"/>
<small>International phone numbers must begin with +</small>	
Mobile Phone Number	<input type="text"/>
<small>International phone numbers must begin with +</small>	
E-mail Address ★	<input type="text" value="mguan002@plattsburgh.edu"/>
Campus	<input type="text" value="Plattsburgh (28240)"/>
Department	<input type="text" value="Regional Procurement Services (Regional Procurement Services - PLA)"/>
Authentication Method	<input type="text" value="SAML"/>
User Name ★	<input type="text" value="PLA-MGUAN002"/>

★ Required

- Then, you will click on the *User Code Favorites* tab. Here you will see your account codes with fiscal year noted. Click on the *Edit* button.

STATE UNIVERSITY OF NEW YORK
PLATTSBURGH

My Profile ▶ Custom Field and Accounting Code Defaults

Mitchell Guanga

User Name PLA-MGUAN002

User Profile and Preferences

Default User Settings

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

Payment Options

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

Custom Field and Accounting Code Defaults

Document Header Internal Fields Account Code Assignments **User Code Favorites** Internal Information

Campuses: Plattsburgh (28240)

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes

RPS (default)

Edit

Delete

Account Source	Fiscal YR-SUNY	Account-SUNY	Full/Partial-SUNY	Project-RF	Project End Date	Task-RF	Award-RF	Award End Date	Exp Major-RF	Exp Minor-RF	TTO Docket-RF
S State	2023 Fiscal Year 2023-2024	86076000-28240 Regional Procurement Services	Partial Partial	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	N/A RF Only	no value

Add

SUNY Object

UNSPSC/Commodity	Object
no value	no value

4. Finally, you will click on the *Select from all values...* option and in the drop down menu, select the newest fiscal year. Then select *Update*, and you are all set.

The image displays two screenshots of the 'Accounting Codes' form, illustrating the steps to select the newest fiscal year.

Top Screenshot: The 'Accounting Codes' form is shown. The 'Fiscal YR-SUNY' field is highlighted with a yellow box, and the 'Select from all values...' option is selected. The 'Update' button is visible at the bottom.

Bottom Screenshot: The 'Accounting Codes' form is shown again. The 'Fiscal YR-SUNY' field is highlighted with a yellow box, and the 'Select from all values...' option is selected. The dropdown menu is open, showing a list of fiscal years from 2005 to 2024. The '2024 - Fiscal Year 2024-2025' option is selected. The 'Update' button is visible at the bottom.

The form contains the following fields and options:

- Nickname: RPS
- Default: ☒
- Account Source: S
- Fiscal YR-SUNY: 2023
- Account-SUNY: 86076000-28240
- Full/Partial-SUNY: Partial
- Project-RF: N/A
- Project End Date: N/A
- Task-RF: N/A
- Award-RF: N/A
- Award End Date: N/A
- Exp Major-RF: N/A
- Exp Minor-RF: N/A
- TTO Docket-RF:
- add split:

The dropdown menu for 'Fiscal YR-SUNY' lists the following options:

- 2005 - Fiscal Year 2005-2006
- 2006 - Fiscal Year 2006-2007
- 2007 - Fiscal Year 2007-2008
- 2008 - Fiscal Year 2008-2009
- 2009 - Fiscal Year 2009-2010
- 2010 - Fiscal Year 2010-2011
- 2011 - Fiscal Year 2011-2012
- 2012 - Fiscal Year 2012-2013
- 2013 - Fiscal Year 2013-2014
- 2014 - Fiscal Year 2014-2015
- 2015 - Fiscal Year 2015-2016
- 2016 - Fiscal Year 2016-2017
- 2017 - Fiscal Year 2017-2018
- 2018 - Fiscal Year 2018-2019
- 2019 - Fiscal Year 2019-2020
- 2020 - Fiscal Year 2020-2021
- 2021 - Fiscal Year 2021-2022
- 2022 - Fiscal Year 2022-2023
- 2023 - Fiscal Year 2023-2024
- 2024 - Fiscal Year 2024-2025