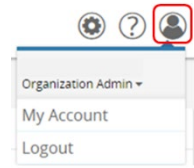


## Resetting Your Organization's Fiscal Year in COMMBUYS

### Guidance for Standalone Organizations (municipalities, for example)

Note: You must be signed in as the Organization Administrator to take these actions. Click on the silhouette at the top right portion of the COMMBUYS dashboard and select the Organization Administrator role to begin.

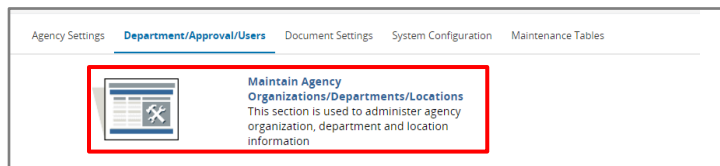


### Set New Fiscal Year (FY) Dates and Roll Dates

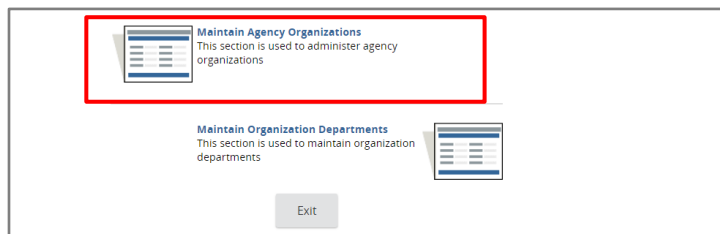
To complete this action, the OA will click on the **Home** link.



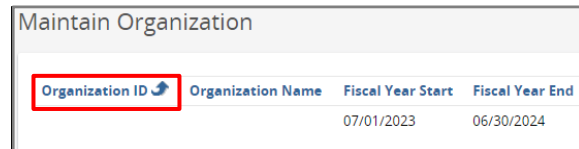
From the Organization Administrator Home screen, select the **Maintain Agency Organizations/Departments/ Locations link**



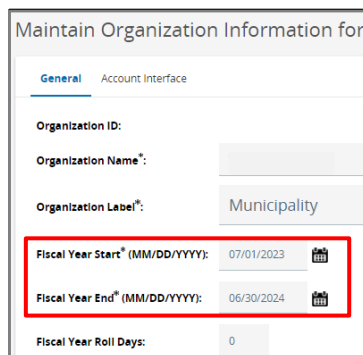
Then select the **Maintain Agency Organizations** link.



Click on the **Organization ID** hyperlink.



On the **General** tab, set the new **Fiscal Year Start** and **Fiscal Year End** dates. OAs also may update the **Fiscal Year Roll Days\*** to enable the processing of prior FY documents.



| Maintain Organization Information for:                       |              |
|--|--------------|
| <div> <div>General</div> <div>Account Interface</div> </div> |              |
| Organization ID:   |              |
| Organization Name*:  |              |
| Organization Label*:   | Municipality |
| Fiscal Year Start* (MM/DD/YYYY):                             | 07/01/2023   |
| Fiscal Year End* (MM/DD/YYYY):                               | 06/30/2024   |
| Fiscal Year Roll Days:                                       | 0            |

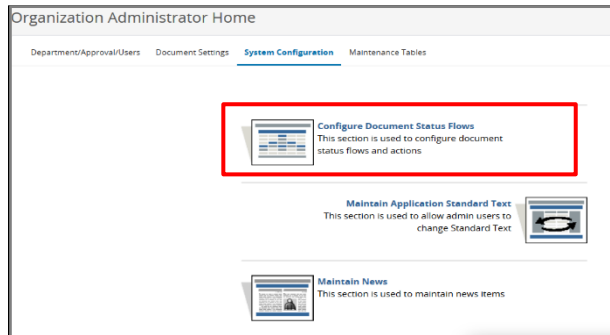
\*Setting **Fiscal Year Roll Days** is not required. **Fiscal Year Roll Days** may be left at zero so that users may create documents only for the current FY. Setting Fiscal Year Roll Days at 30, by contrast, would enable users to process prior FY documents for the first 30 days of the new FY.

Click **Save and Continue**

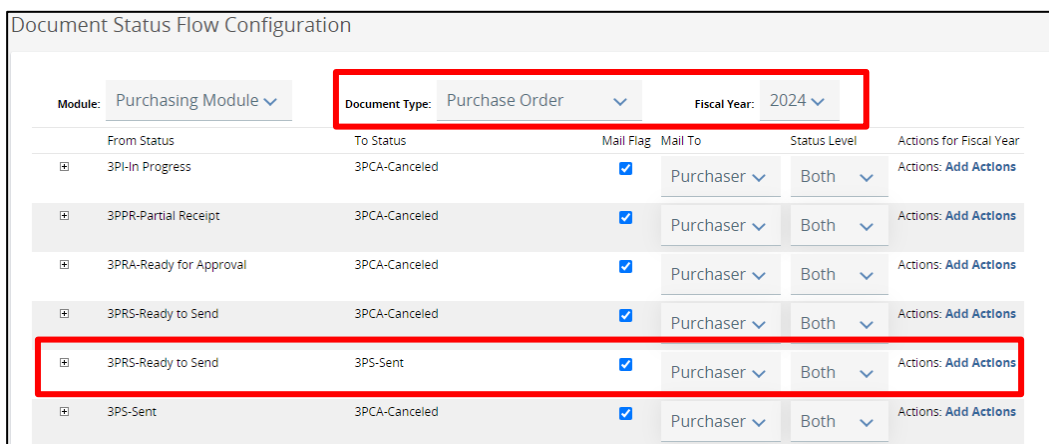
## Roll Status Flows to the New Fiscal Year

Following the close of business on the last day of the FY, OAs will copy the prior year status flow actions for the Purchase Order Document Type to the new FY.

From the **Organization Administrator Home** screen, OAs will select the **System Configuration** tab and click on the **Configure Document Status Flows** icon.

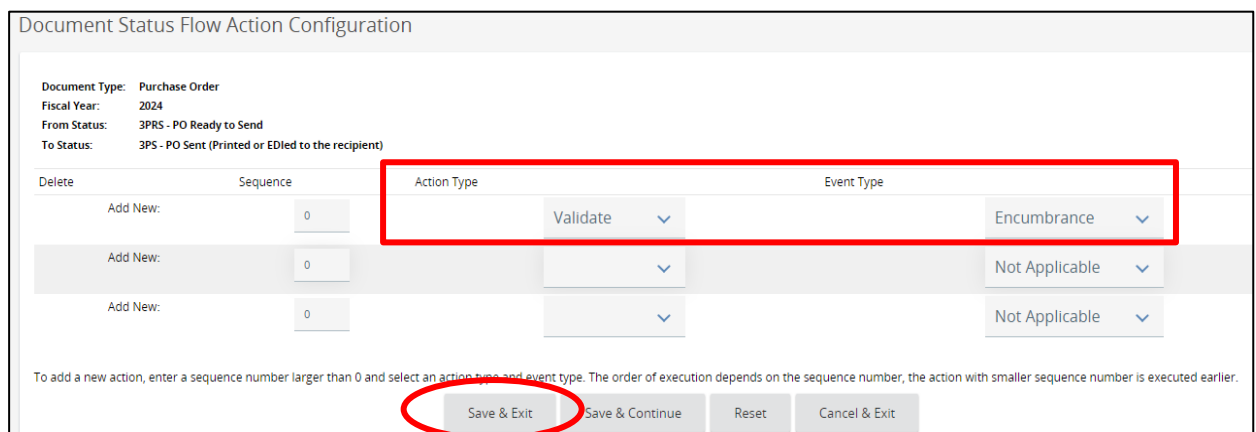


On the **Document Status Flow Configuration** page, select **Purchase Order** from the **Document Type** drop-down menu. On the row showing **3PRS-Ready to Send** (*From Status* column) and **3PS-Sent** (*To Status* column), select **Add Actions**.



| Module            | Document Type  | Fiscal Year | From Status             | To Status     | Mail Flag                           | Mail To   | Status Level | Actions for Fiscal Year              |
|-------------------|----------------|-------------|-------------------------|---------------|-------------------------------------|-----------|--------------|--------------------------------------|
| Purchasing Module | Purchase Order | 2024        | 3PI-In Progress         | 3PCA-Canceled | <input checked="" type="checkbox"/> | Purchaser | Both         | Actions: <a href="#">Add Actions</a> |
|                   |                |             | 3PPR-Partial Receipt    | 3PCA-Canceled | <input checked="" type="checkbox"/> | Purchaser | Both         | Actions: <a href="#">Add Actions</a> |
|                   |                |             | 3PRA-Ready for Approval | 3PCA-Canceled | <input checked="" type="checkbox"/> | Purchaser | Both         | Actions: <a href="#">Add Actions</a> |
|                   |                |             | 3PRS-Ready to Send      | 3PCA-Canceled | <input checked="" type="checkbox"/> | Purchaser | Both         | Actions: <a href="#">Add Actions</a> |
|                   |                |             | 3PRS-Ready to Send      | 3PS-Sent      | <input checked="" type="checkbox"/> | Purchaser | Both         | Actions: <a href="#">Add Actions</a> |
|                   |                |             | 3PS-Sent                | 3PCA-Canceled | <input checked="" type="checkbox"/> | Purchaser | Both         | Actions: <a href="#">Add Actions</a> |

On the **Document Status Flow Action Configuration** page, select **Validate** under *Action Type* and **Encumbrance** under *Event Type*. Click **Save & Exit**.



| Delete                   | Sequence | Action Type | Event Type     |
|--------------------------|----------|-------------|----------------|
| <a href="#">Add New:</a> | 0        | Validate    | Encumbrance    |
| <a href="#">Add New:</a> | 0        |             | Not Applicable |
| <a href="#">Add New:</a> | 0        |             | Not Applicable |

To add a new action, enter a sequence number larger than 0 and select an action type and event type. The order of execution depends on the sequence number, the action with smaller sequence number is executed earlier.

[Save & Exit](#) [Save & Continue](#) [Reset](#) [Cancel & Exit](#)

Verify the changes have been saved and that the Actions for Fiscal Year show **Validate E**.

| Document Status Flow Configuration |                   |                                     |                |              |                            |  |
|------------------------------------|-------------------|-------------------------------------|----------------|--------------|----------------------------|--|
| Module:                            | Purchasing Module | Document Type:                      | Purchase Order | Fiscal Year: | 2024                       |  |
| From Status                        | To Status         | Mail Flag                           | Mail To        | Status Level | Actions for Fiscal Year    |  |
| 3PI-In Progress                    | 3PCA-Canceled     | <input checked="" type="checkbox"/> | Purchaser      | Both         | Actions: Add Actions       |  |
| 3PPR-Partial Receipt               | 3PCA-Canceled     | <input checked="" type="checkbox"/> | Purchaser      | Both         | Actions: Add Actions       |  |
| 3PRA-Ready for Approval            | 3PCA-Canceled     | <input checked="" type="checkbox"/> | Purchaser      | Both         | Actions: Add Actions       |  |
| 3PRS-Ready to Send                 | 3PCA-Canceled     | <input checked="" type="checkbox"/> | Purchaser      | Both         | Actions: Add Actions       |  |
| 3PRS-Ready to Send                 | 3PS-Sent          | <input checked="" type="checkbox"/> | Purchaser      | Both         | Actions: <b>Validate E</b> |  |
| 3PS-Sent                           | 3PCA-Canceled     | <input checked="" type="checkbox"/> | Purchaser      | Both         | Actions: Add Actions       |  |

Please note: This process only is required for the Purchase Order **Document Type**.

### OSD Help Desk Resources

OSD Help Desk personnel are available to assist you by phone at 888-MA-State (627-8283) or via email at [OSDHelpDesk@mass.gov](mailto:OSDHelpDesk@mass.gov). Help Desk hours are 8:00 a.m. to 5:00 p.m. ET, Monday through Friday.