How do I create a requisition?

CUNYfirst
Fully Integrated Resources & Services Tool

••• Serving our Students, Faculty & Staff

CUNYfirst
Fully Integrated Resources & Services Tool

CU NY | The City University of New York

Sign In

Username [   ]

Password [   ]

[Log In]

Forgot Your Password? | Change Password | First Time Users

CUNYfirst is The City University of New York's fully integrated resources and services tool, using the latest technology to serve our students, faculty and staff.

Signing on to CUNYfirst - from anywhere, anytime - will allow students to manage their academic careers and financial accounts in real time and more. It will give faculty additional tools to enhance their interaction with students. It is also designed to give staff access to powerful processes that connect with the finance, student administration and human resources functions necessary to operating the nation's largest urban university.

Note: Users of this system must use their individually assigned user ID. Sharing of user IDs and passwords is prohibited by CUNY's Security Policies & Procedures (security.cuny.edu).

All users who access their accounts at college workstations and kiosks should remember to log out of CUNYfirst at the end of their sessions to ensure their accounts are securely closed.

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Create Requisitions

CUNYFIRST MENU

- Enterprise Learning Management
- Financials Supply Chain
- HR / Campus Solutions
- Student Center
- CUNY Alert Preferences
- CUNY Alert Subscription
- NYS Voter Registration
- NYS Voter Registration Form
- My Personalizations
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Main Menu >

eProcurement
Set up eProcurement; manage or approve eProcurement requ...

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Create Requisition
Create a new requisition by browsing or searching company or external catalogs.

Buyer Center
Create/edit/approve purchase order; source requisition; process change request.
- Manage Purchase Orders
- Expedite Requisitions
- Quick Source Requisitions
  - 8 More...

Administer Procurement
Administer eProcurement security, purchasing options, control data, and users.

Procurement - Create a Requisitions - Revised 9.13.17

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1. Define Requisitions

Create Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: LAGPR   LaGuardia CC - CUNY

Requester: 23055549   Cristina Natale   ***Currency:** USD

Requisition Name: [   ]   **Priority:** Medium ▾

▶ **Line Defaults**

Continue

Name your requisitions it will assist you in identifying your requisition as it flows through the system

The default Priority is set to **Medium.** If you have an emergency contact the Purchasing Department and we can help facilitate your request

If entering multiple lines open Line Defaults by clicking the Expand icon (see next slide)
If only entering a single line just click continue to proceed

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Line Defaults

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: 1000004048   Vendor Location: DEFAULT

Buyer: Category: 4412000000   Unit of Measure: EA

Shipping Defaults

Ship To: M-M-B98C1   Modify Shipping Address   ****Never Change this field****

Due Date: Attention:

Accounting Defaults   Customize | Find | First 1 of 1 Last

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Location	GL Unit	Account	
E-E-413	LAG01		−

PLEASE DO NOT CREATE A REQUISITION WITHOUT SELECTING A VENDOR

    *Select the Category Code **(Refer to the Category Code Sheet)**

    *Define the UOM for use on this Requisition.

    *Make sure the location is your current location if not search by using the magnifying
    glass.

    If you location does not default please contact the helpdesk to determine if
    you will need to fill out a security access form to update you information in CF

    *Select the vendor for all the items on this Requisition.

If the vendor you are searching for does not exist please contact the Purchasing Department and we can assist you finding or getting your vendor added to CF.

CODE TIP SHEET

Important: Failure to use the correct category code will result in your requisition being delayed for processing

<$K - Less Than $ Per Unit *** >$K - Greater Than $ Per Unit			
WHAT AM I REQUESTING?	**CATEGORY CODE**	**EXPENSE ACCOUNT CODE**	**Category Approval and/ Inspection Required**
Budget Account 80061 - Office Supplies; Paper Supplies; Cleaning Supplies; Classroom Supplies; Audiovisual Materials			
Hardware	3116000000	51006	
Human Body, or Body Part or Organ Models	6010410100	51105	
Interior Finishing Materials	3016000000	51006	
Janitorial Equipment - (sweepers, scrubbers, buffers, vacuums)	4712000000	51006	
Janitorial Supplies	4713000000	51006	
Janitorial Supplies - Green Products	4713000090	51006	
Lamps, Bulbs and Parts	3910000000	51006	
Latex Paints	3121150699	51006	
Lubricants, Oil, Grease	1512000000	51006	
Lubricants, Oil, Grease - Green Products	1512000090	51006	
Office Supplies - (pens, file folders, organizers, staplers, scissors, tape, calendars, planners)	4412000000	51001	
Paint, Primer, Finishes	3121000000	51006	
Paint, Primer, Finishes - Hazardous	3121000080	51006	
Paper Products	1411000000	51002	
Paper Towels	1411170399	51002	
Photo, Filmmaking Supplies	4514000000	51105	
Plumbing Fixtures	3018000000	51006	
Printer, Fax and Photocopier Supplies - (toner, ink cartridges, print heads)	4410310000	51001	
Signage and Accessories	5512000000	51105	
Toilet Cleaners	4713182999	51006	
Toilet Seat Covers	1411170299	51002	
Toilet Tissue	1411170499	51002	
Trash Bags	4712170199	51006	

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2. Add items & Services

Create Requisition

| ⁂ | **1. Define Requisition** | | **2. Add Items and Services** | | **3. Review and Submit** |

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: [_____] 🔍 Search

| Catalog | Favorites | Templates | Forms | Web | **Special Request** |

Select a Request Type

Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

Now Click the Special Request Tab

Then, Click the Special Item Link

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Special Items Link

Special Item

*Item Description:	Pilot Pen		
*Price:	2.59000	*Currency:	USD
*Quantity:	12.0000	*Unit of Measure:	EA
*Category:	4412000000	Due Date:	
Vendor ID:	1000004048	OFFICE MAX	Suggest New Vendor
Vendor Item ID:			
Mfg ID:			
Mfg Item ID:			

Additional Information

This note will appear on selected items for which check box is selected below.

Request New Item

☐ Request New Item

☑ Send to Vendor   ☑ Show at Receipt   ☑ Show at Voucher

[Add Item]   [Cancel]   [Add or Start New Type]

→**All fields with an asterisk * are required**
→**Vendor Item ID/ Mfg ID/Mfg Item ID are required for goods only. [Not required for Service orders.]**

- The additional information field can be used to provide additional information for items being purchased i.e.(Specifics of furniture, color, size, printing details etc.)
- Click Add item to save the item and add additional items if necessary

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Requisition Summary

Requisition Summary		
Description	**Qty**	**UOM**
PILOT PENS	12	EA
PENCIL	50	EA

Total Lines: 2
Total Amount (USD): 91.98

After adding your item it appears in the Requisition Summary

You are now ready to Review and Submit your requisition

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3. Review and Submit

❖ **Review/Validate before submission or make additional changes to the shipping information or the accounting detail**

Clicking the ▷ will expand the line and show detail information i.e. Chartfields

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Chartfields 1

Make sure to check the Chartfield 1 tab for account accuracy. The category and account must match unless otherwise specified.

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Chartfields 2

Check that these numbers match the corresponding columns in your Budget Report! **If not**, click Modify Line/Shipping/Accounting to change the numbers.

To Modify Chartfields:

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: [ ] 🔍   **Vendor Location:** [ ] 🔍

Buyer: [ ] 🔍   **Category:** [ ] 🔍

Shipping Information

Ship To: [ ] 🔍   ✉ Modify Shipping Address

Due Date: [ ] 📅   **Attention:** [ ]

**The fields will be blank!
Only put in the information you need to change!!!**

Accounting Information

Customize | Find | 🔲 | ▦   First ◀ 1 of 1 ▶ Last

	Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	[▦▶]	
	Percent	**Location**		**GL Unit**	**Account**		
1	[ ]	[ ] 🔍		LAG01 🔍	[ ] 🔍	➕	➖

Load Values From Defaults

[Apply]   [Cancel]

Here is where you can change a *specific* chartfield.
(For example: Expense Account # or Special Initiative #)
You can change the chartfields in "Create Requisition" and "Manage Requisition". Click APPLY.

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Creating a Blanket Requisition

Create Requisition

Line Details

Line: 1   [Blanket Requisition for Office](#)   **Line Status:** Open

▼ Item Details

Amount: 500.00   USD

Category: 4412000000   Office supplies   [View Hierarchy](#)

Buyer: [   ] 🔍 [Buyer Information](#)

Vendor: [1000000162   ] 🔍 STAPLES INC STAPLES   [Suggest New Vendor](#)
                                        BUSINESS ADVANTAGE
Vendor Location: [DEFAULT   ] 🔍 DEFAULT

Vendor's Catalog: [   ]

Vendor Item ID: [   ]

Manufacturer ID: [   ] 🔍

Manufacturer's Item ID: [   ] 🔍   UPN ID:

Physical Nature [Goods   ▼]

☐ RFQ Required   ☐ Zero Price Indicator   ☑ Amount Only
☐ Device Tracking   ☐ Stockless Item   ☐ Inspection Required
[Configuration Info](#)

▶ Contract

▶ Sourcing Controls

[OK]   [Cancel]

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Create Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: LAGPR   LaGuardia CC - CUNY

Requester: *Currency: USD

Requisition Name: Priority: Medium

Line Details

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	PILOT PEN	OFFICE MAX	20.0000	Each	2.12000	42.40
2	PENCIL	OFFICE MAX	20.0000	Each	1.49000	29.80

☐ Select All / Deselect All

Total Amount: 72.?0 USD

❤ Add to Favorites   Add to Template(s)   Modify Line / Shipping / Accounting   🗑 Delete

Justification/Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Check Budget

Save & submit   Save & preview approvals   ✖ Cancel requisition   Find more items

Click on add comments icon to attach any supporting documents to your requisition.

MANDATORY!

*Make sure to save & preview BEFORE final save and submit to ensure your requisition is being routed to your Supervisor correctly

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3. Review and Submit

Confirmation

Requested For:	CUNY Requester	Number of Lines:	2
Requisition Name:	0000000052	Total Amount:	72.20 USD
Requisition ID:	0000000052		
Business Unit:	LAGPR		
Priority:	Medium		
Budget Status:	Not Checked		

Supervisor Approval

▽ **Requisition 0000000052:** Pending   ⊞ Start New Path

Supervisor Approval

Pending
🕐 Ena.Jordan
Supervisor by UserID

Department/Category Approval

▽ **Line 1:** Initiated   ⊞ Start New Path
PILOT PEN

Department Approval

Not Routed
Multiple Approvers
ePro Dept Manager Approval 1

Not Routed
Multiple Approvers
ePro Dept Manager Approval 2

▽ **Line 2:** Initiated   ⊞ Start New Path
PENCIL

Department Approval

Not Routed
Multiple Approvers
ePro Dept Manager Approval 1

Not Routed
Multiple Approvers
ePro Dept Manager Approval 2

[Submit]   [Edit Requisition]   [Apply Approval Changes]   [Check Budget]

View printable version   Manage Requisitions   Create New Requisition

CLICK!

❖ **Submit**
  ❖ Click to submit requisition to the approval workflow
❖ **Edit Requisition:**
  ❖ To access the edit page, where you can make update the requisition and submit it again
❖ **Approval workflows**
  ❖ Triggers when requesters *submits* a requisition, and a set of approvers act on the request (approve or deny).

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TOP Things to Remember!

❖ **Always Check your budget first before entering a requisition**

❖ **If your requisition status is "Open" it means that it has not been routed to your Supervisor and will not get approved**

❖ **Make sure the description on your requisition tells Purchasing what you are buying (i.e. Chair, Computer etc…)**

❖ **Requisition must be fully Approved and have a Valid Budget status for Purchasing to process.**

❖ **Attach your supporting documents, ie; Quotes, Proposals, Estimates, etc.**

❖ **Manage your requisitions**

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Contact us !
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