CU
NY

Baruch College. Borough of Manhattan Community College. Bronx Community College. Brooklyn College. CUNY School of Law. CUNY Graduate Center. CUNY Graduate School of Journalism. CUNY School of Professional Studies. Hostos Community College. Hunter College. John Jay College. Kingsborough Community College. LaGuardia Community College. Lehman College. Macaulay Honors College. Medgar Evers College. New York City College of Technology. Queens College. Queensborough Community College. The City College. The College of Staten Island. York College. Baruch College. Borough of Manhattan Community College. Bronx Community College. Brooklyn College. CUNY School of Law. CUNY Graduate Center. CUNY Graduate School of Journalism. CUNY School of Professional Studies. Hostos Community College. Hunter College. John Jay College. Kingsborough Community College. LaGuardia Community College. Lehman College. Macaulay Honors College. Medgar Evers College. New York City College of Technology. Queens College. Queensborough Community College. The City College. The College of Staten Island. York College. Baruch College. Borough of Manhattan Community College. Bronx Community College. Brooklyn College. CUNY School of Law. CUNY Graduate Center. CUNY Graduate School of Journalism. CUNY School of Professional Studies. Hostos Community College. Hunter College. John Jay College. Kingsborough Community College. LaGuardia Community College. Lehman College. Macaulay Honors College. Medgar Evers College. New York City College of Technology. Queens College. Queensborough Community College. The City College. The College of Staten Island. York College.

CUNYfirst
PROCUREMENT
TRAINING

CUNYfirst

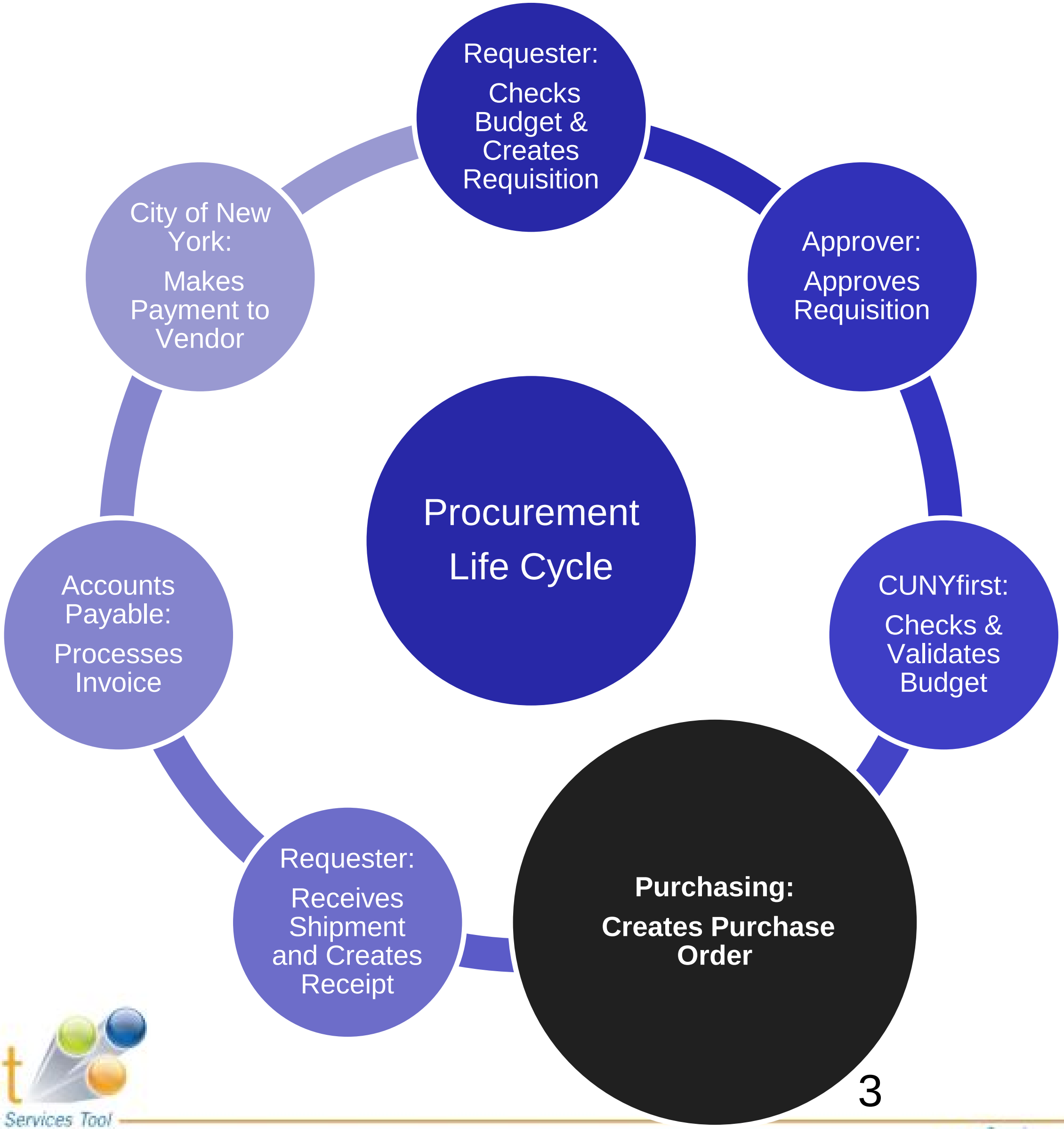
Fully Integrated Resources & Services Tool

Serving our Students, Faculty & Staff

Table of Contents

- Create a requisition *(slides 4-25)*
- Approve a requisition *(slides 23-29)*
- Manage a requisition *(slides 30-36)*

OVERVIEW



Procurement Life Cycle

Requester: Checks Budget & Creates Requisition

Approver: Approves Requisition

CUNYfirst: Checks & Validates Budget

Purchasing: Creates Purchase Order

Requester: Receives Shipment and Creates Receipt

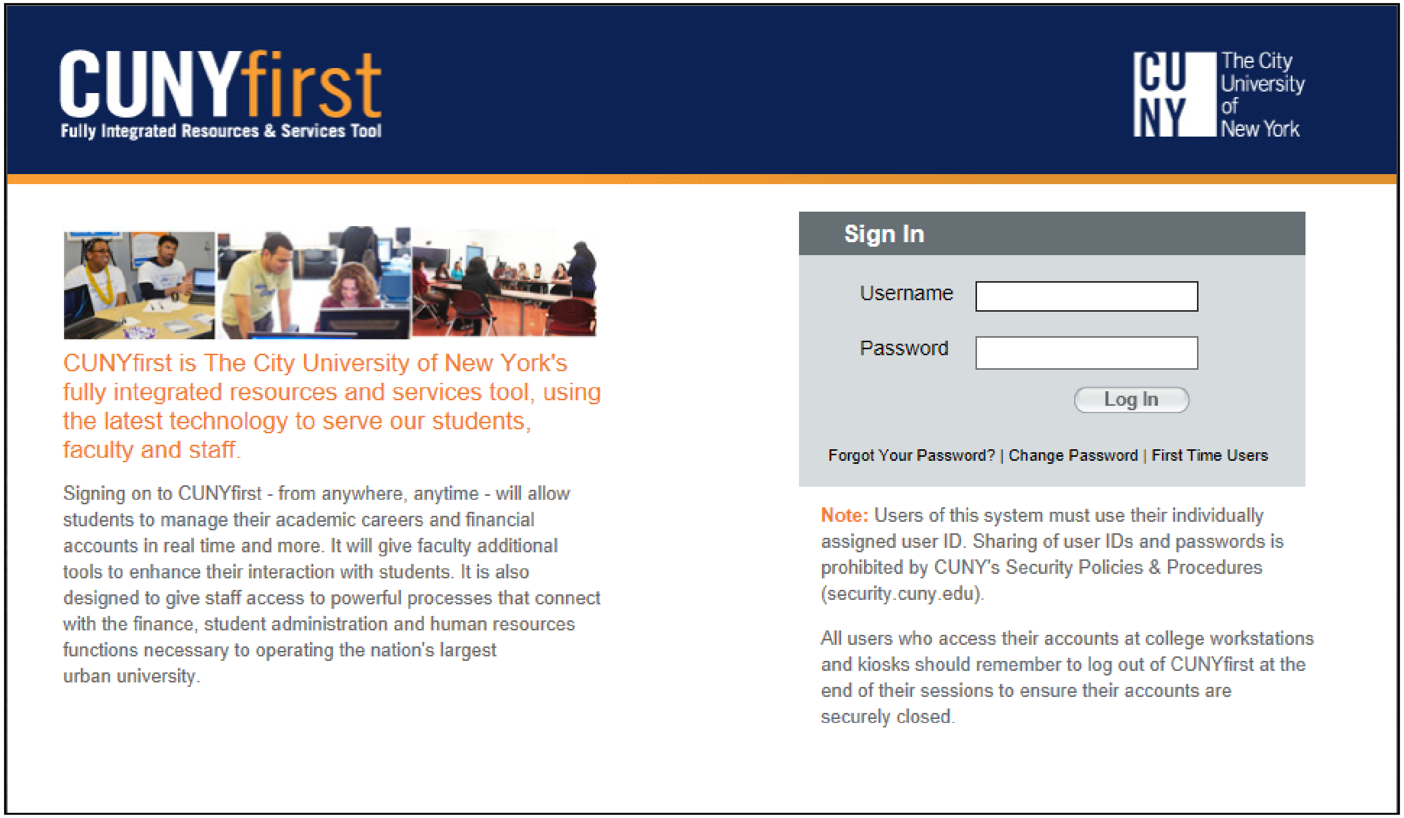
Accounts Payable: Processes Invoice

City of New York: Makes Payment to Vendor

How do I create a requisition?

Step 1 - Login into CUNYfirst

https://home.cunyfirst.cuny.edu/cnyepprd/signon.html using your **username** and **password**



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.

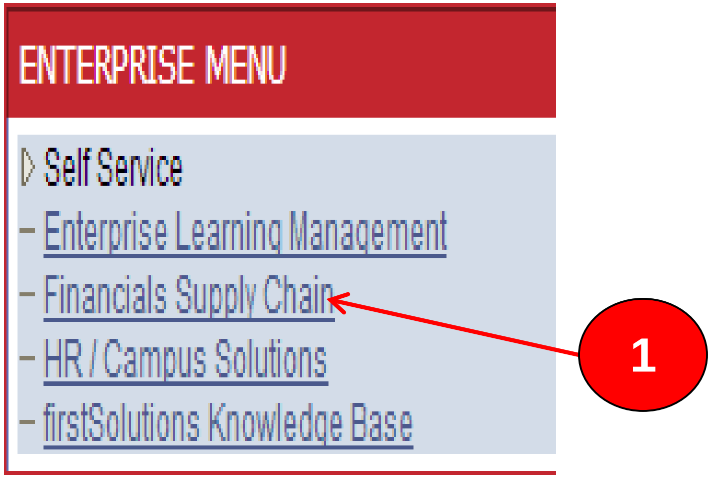
Signing on to CUNYfirst - from anywhere, anytime - will allow students to manage their academic careers and financial accounts in real time and more. It will give faculty additional tools to enhance their interaction with students. It is also designed to give staff access to powerful processes that connect 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.

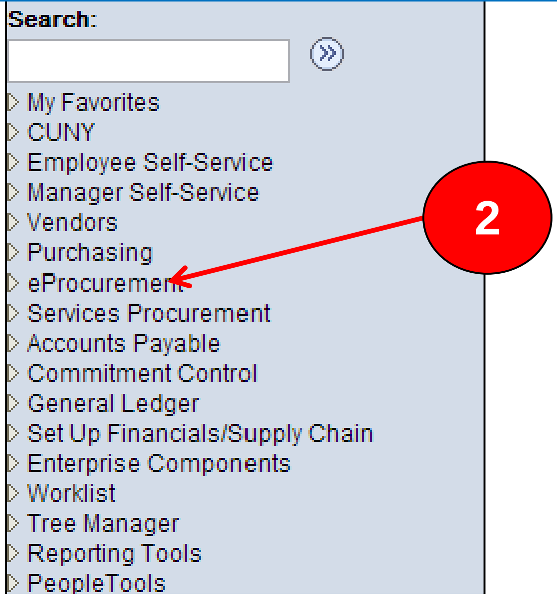
CUNYfirst
Fully Integrated Resources & Services Tool
CUNY The City University of New York
Sign In
Username
Password
Log In
Forgot Your Password? | Change Password | First Time Users

Create Requisitions



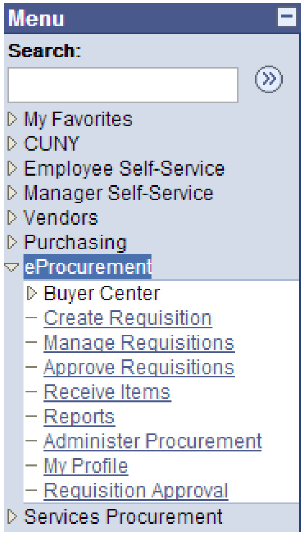
ENTERPRISE MENU

- Self Service
- Enterprise Learning Management
- Financials Supply Chain
- HR / Campus Solutions
- firstSolutions Knowledge Base



Search:

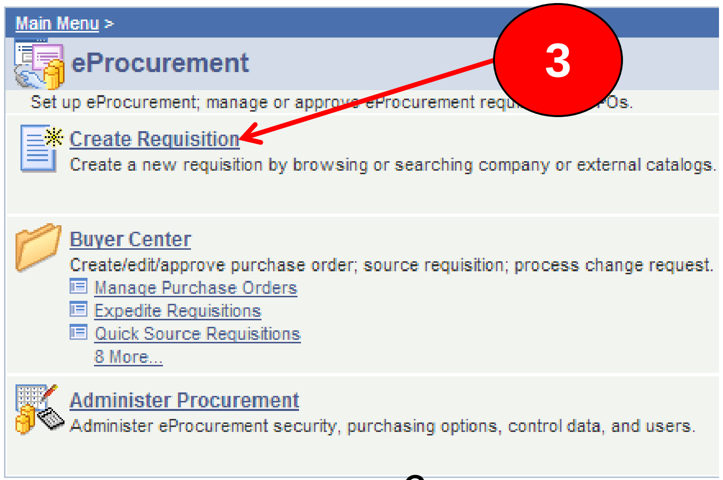
- My Favorites
- CUNY
- Employee Self-Service
- Manager Self-Service
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Payable
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools



Menu

Search:

- My Favorites
- CUNY
- Employee Self-Service
- Manager Self-Service
- Vendors
- Purchasing
- eProcurement
  - Buyer Center
  - Create Requisition
  - Manage Requisitions
  - Approve Requisitions
  - Receive Items
  - Reports
  - Administer Procurement
  - My Profile
  - Requisition Approval
- Services Procurement



Main Menu >

eProcurement

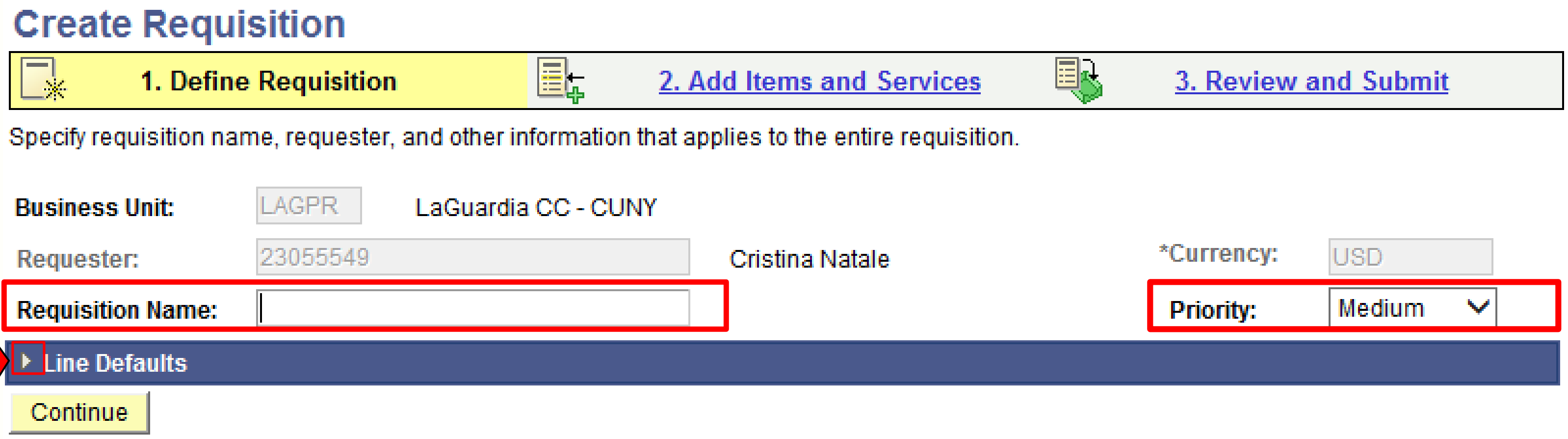
Set up eProcurement; manage or approve eProcurement requ... POs.

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.

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:

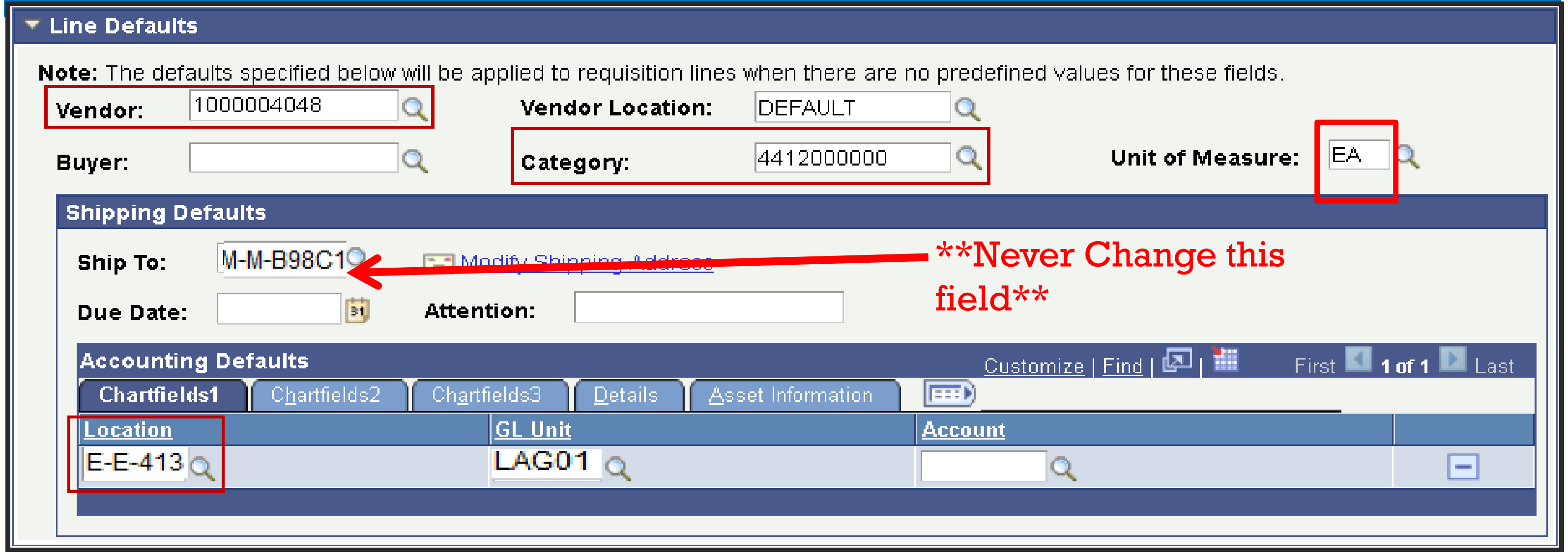
Priority: Medium

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

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

Due Date:

Attention:

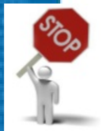
Accounting Defaults

Modify Shipping Address
Customize | Find |
First 1 of 1 Last
Chartfields1
Chartfields2
Chartfields3
Details
Asset Information

Location	GL Unit	Account
E-E-413	LAG01	

Never Change this field

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.

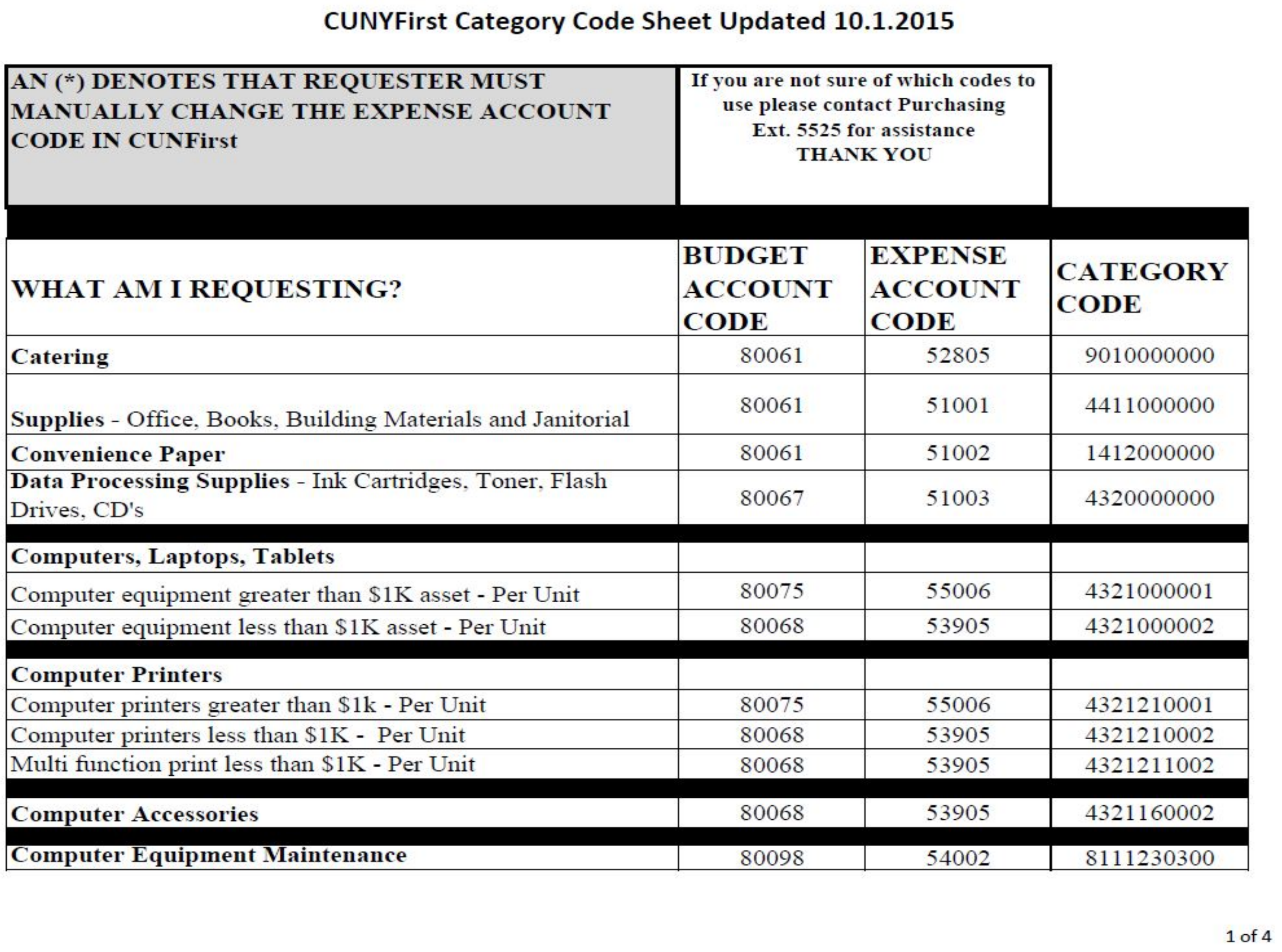
*Make sure the location is your current location if not search by using the magnifying glass.

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



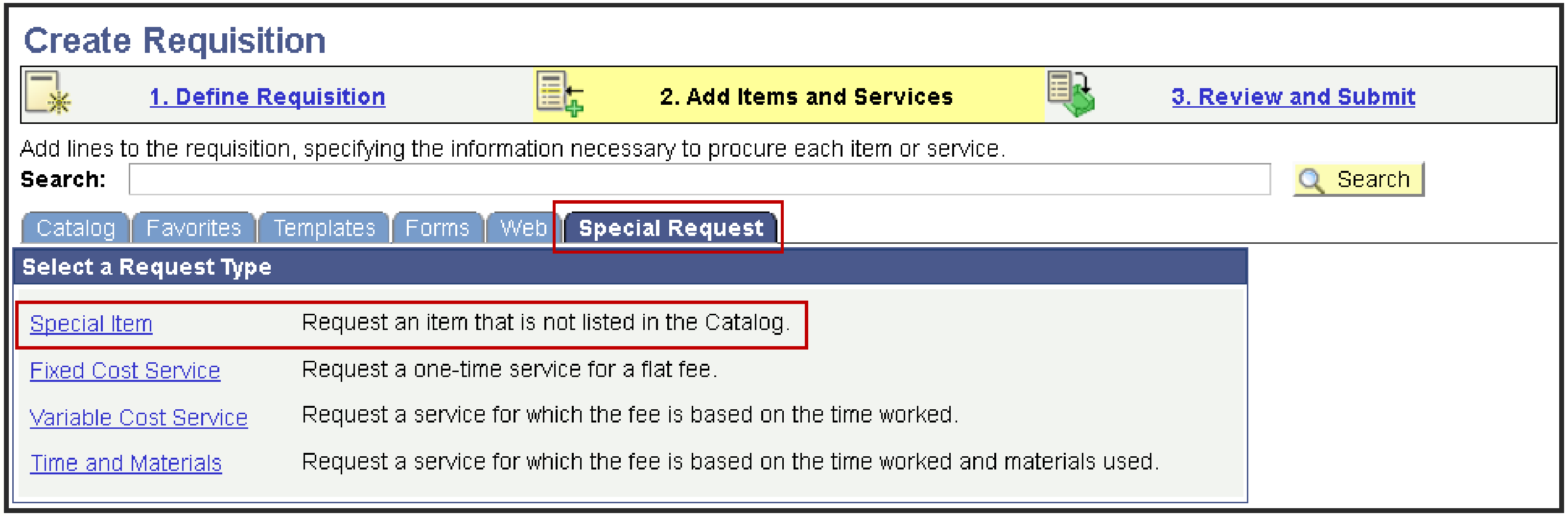
CUNYFirst Category Code Sheet Updated 10.1.2015

AN (*) DENOTES THAT REQUESTER MUST MANUALLY CHANGE THE EXPENSE ACCOUNT CODE IN CUNFirst	**If you are not sure of which codes to use please contact Purchasing Ext. 5525 for assistance THANK YOU**

WHAT AM I REQUESTING?	**BUDGET ACCOUNT CODE**	**EXPENSE ACCOUNT CODE**	**CATEGORY CODE**
Catering	80061	52805	9010000000
Supplies - Office, Books, Building Materials and Janitorial	80061	51001	4411000000
Convenience Paper	80061	51002	1412000000
Data Processing Supplies - Ink Cartridges, Toner, Flash Drives, CD's	80067	51003	4320000000
Computers, Laptops, Tablets			
Computer equipment greater than $1K asset - Per Unit	80075	55006	4321000001
Computer equipment less than $1K asset - Per Unit	80068	53905	4321000002
Computer Printers			
Computer printers greater than $1k - Per Unit	80075	55006	4321210001
Computer printers less than $1K - Per Unit	80068	53905	4321210002
Multi function print less than $1K - Per Unit	80068	53905	4321211002
Computer Accessories	80068	53905	4321160002
Computer Equipment Maintenance	80098	54002	8111230300

1 of 4

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

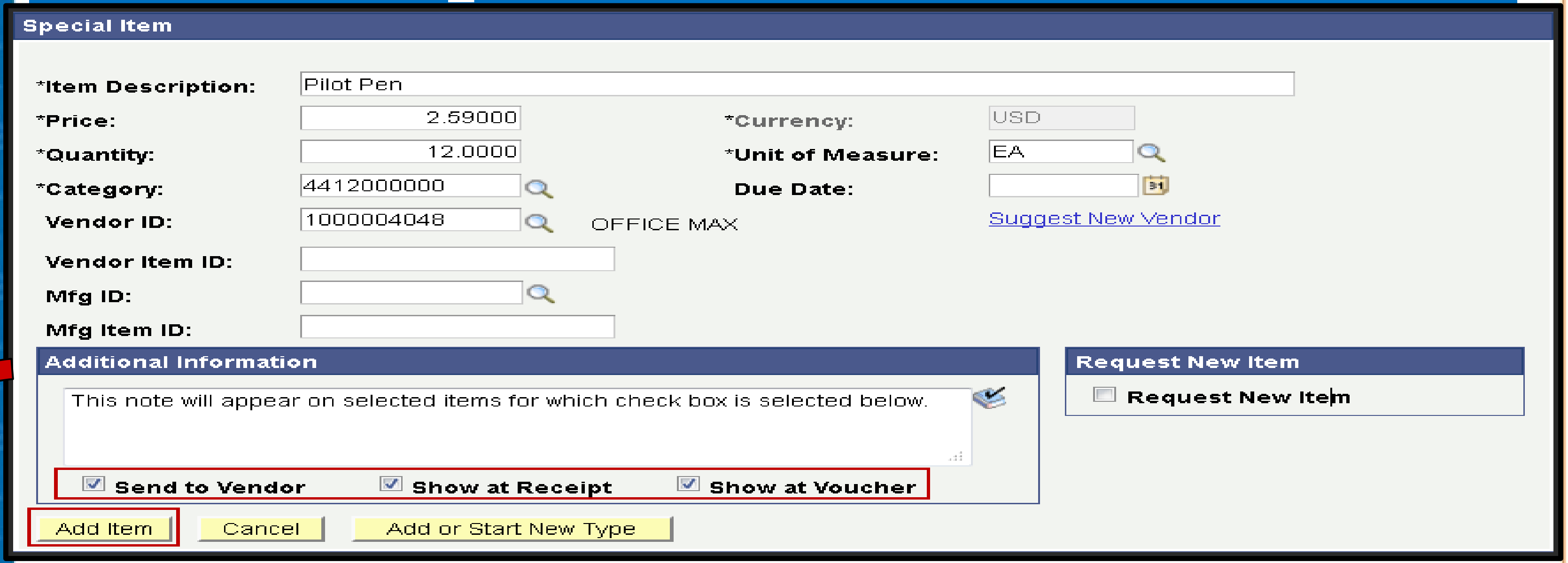
Select a Request Type

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

Special Items Link


Special Item
Suggest New Vendor
Additional Information
Request New Item
Add Item
Cancel
Add or Start New Type

*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
Vendor Item ID:
Mfg ID:
Mfg Item ID:

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

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

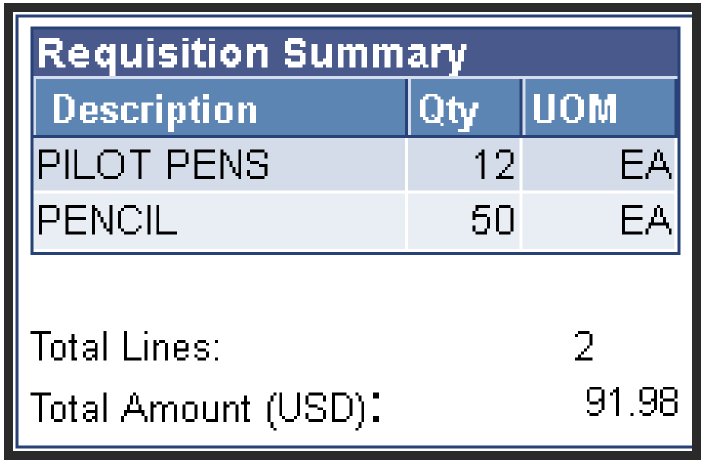
☐ Request New Item

→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

Requisition Summary



Requisition Summary

Description	Qty	UOM
PILOT PENS	12	EA
PENCIL	50	EA

Total Lines: 2

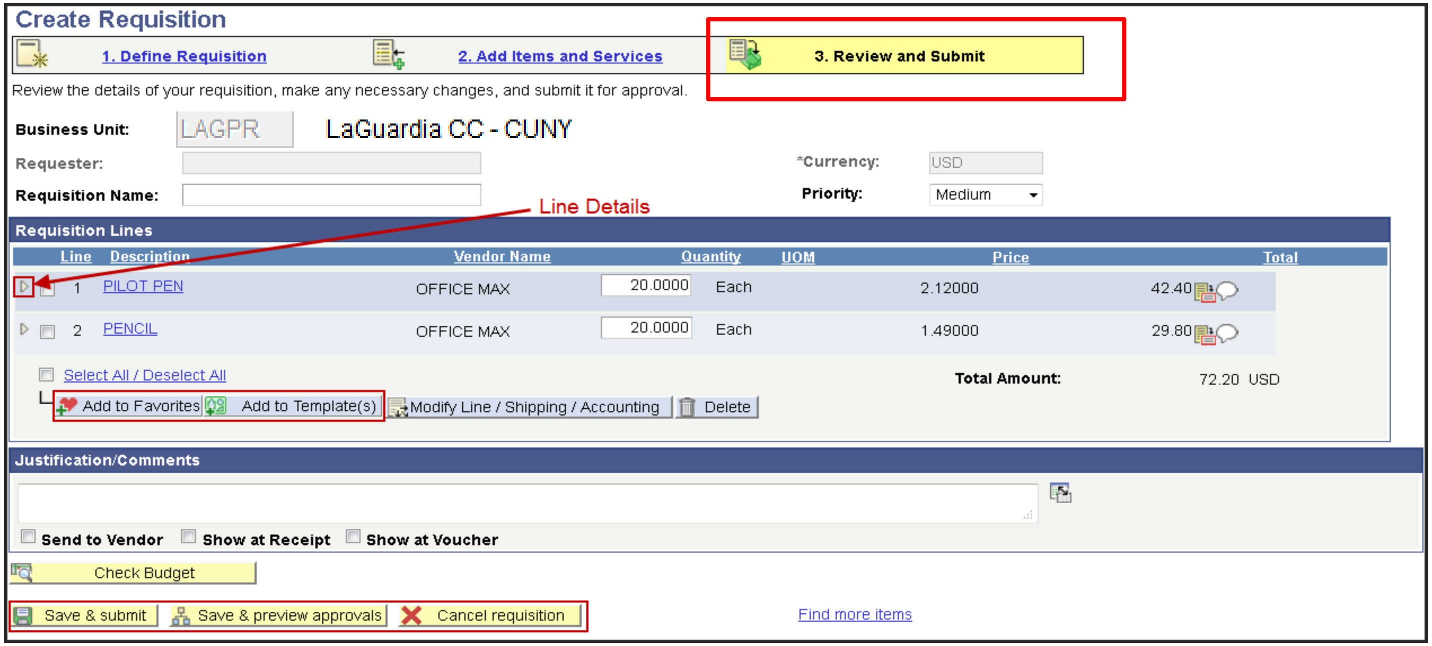
Total Amount (USD): 91.98

After adding your item it appears in the Requisition Summary

You are now ready to Review and Submit your requisition

3. Review and Submit

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



Create Requisition

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

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

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: 72.20 USD

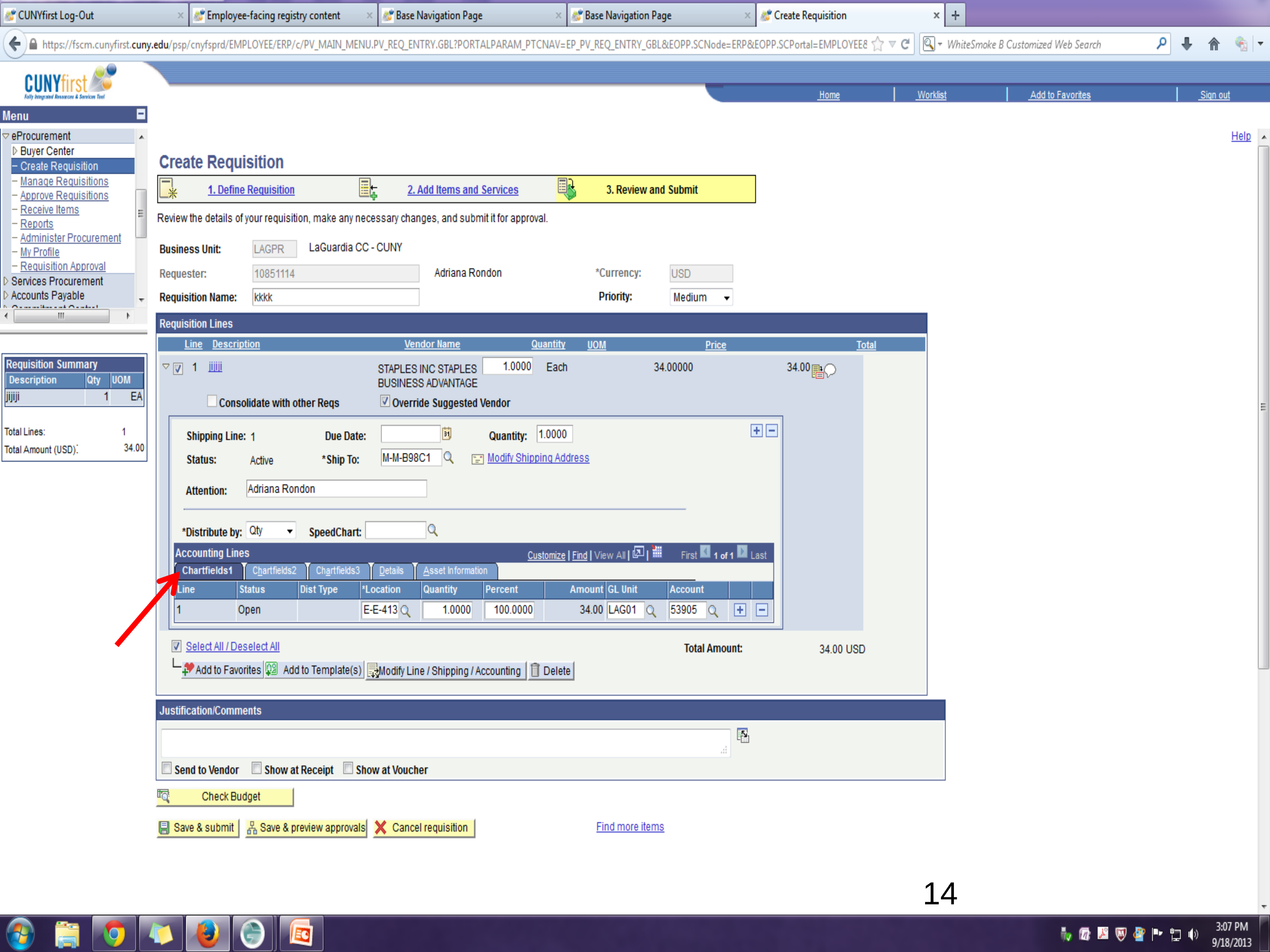
Add to Favorites
Add to Template(s)
Modify Line / Shipping / Accounting
Delete

Justification/Comments

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

Check Budget
Save & submit
Save & preview approvals
Cancel requisition
Find more items

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


CUNYfirst Log-Out
Employee-facing registry content
Base Navigation Page
Base Navigation Page
Create Requisition
https://fscm.cunyfirst.cuny.edu/psp/cnyfsprd/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTRY_GBL&EOPP.SCNode=ERP&EOPP.SCPortal=EMPLOYEE
WhiteSmoke B Customized Web Search
CUNYfirst
Home
Worklist
Add to Favorites
Sign out
Menu
eProcurement
Buyer Center
Create Requisition
Manage Requisitions
Approve Requisitions
Receive Items
Reports
Administer Procurement
My Profile
Requisition Approval
Services Procurement
Accounts Payable
Help

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: 10851114 Adriana Rondon

***Currency:** USD

Requisition Name: kkkk

Priority: Medium

Requisition Summary

Description	Qty	UOM
jjjjji	1	EA

Total Lines: 1

Total Amount (USD): 34.00

Requisition Lines

	Line	Description	Vendor Name	Quantity	UOM	Price	Total
☑	1	jjjjjj	STAPLES INC STAPLES BUSINESS ADVANTAGE	1.0000	Each	34.00000	34.00

☐ Consolidate with other Reqs ☑ Override Suggested Vendor

Shipping Line: 1 **Due Date:** **Quantity:** 1.0000

Status: Active ***Ship To:** M-M-B98C1 Modify Shipping Address

Attention: Adriana Rondon

***Distribute by:** Qty **SpeedChart:**

Accounting Lines

Customize | Find | View All | First 1 of 1 Last
Chartfields1
Chartfields2
Chartfields3
Details
Asset Information

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		E-E-413	1.0000	100.0000	34.00	LAG01	53905

☑ Select All / Deselect All

Total Amount: 34.00 USD

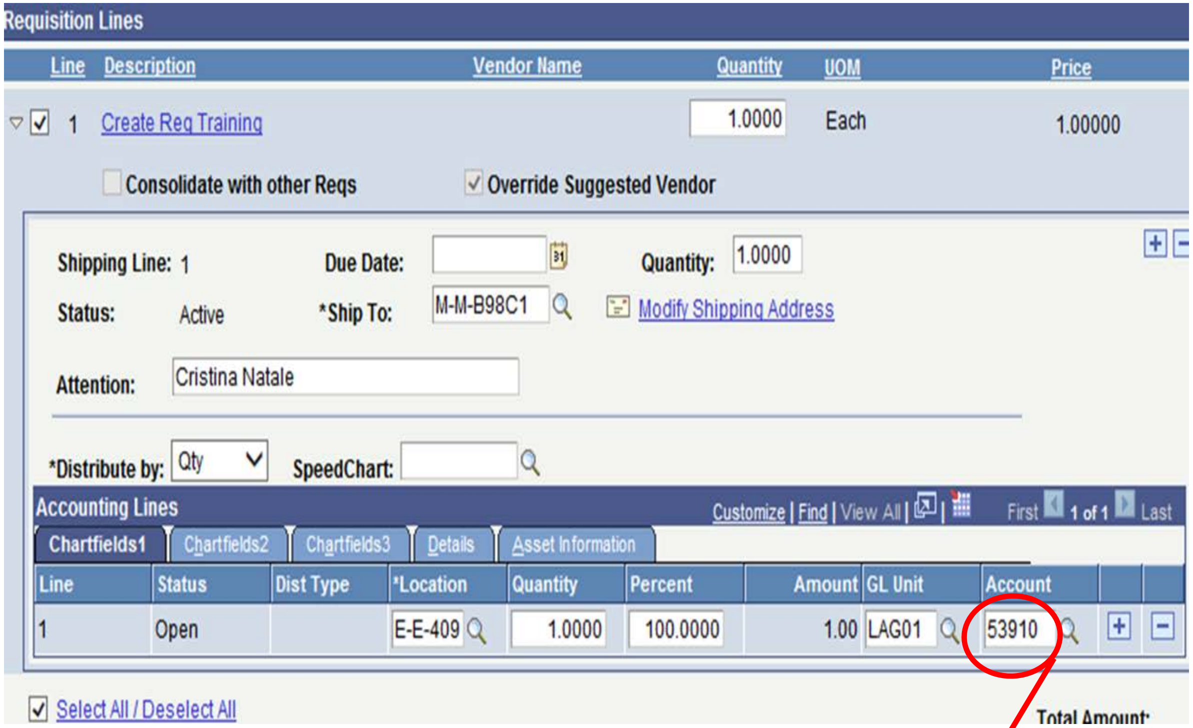
Add to Favorites
Add to Template(s)
Modify Line / Shipping / Accounting
Delete

Justification/Comments

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

Check Budget
Save & submit
Save & preview approvals
Cancel requisition
Find more items
3:07 PM
9/18/2013

Chartfields 1



Requisition Lines

☑ Line	Description	Vendor Name	Quantity	UOM	Price
1	Create Req Training		1.0000	Each	1.00000

☐ Consolidate with other Reqs ☑ Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000

Status: Active *Ship To: M-M-B98C1 Modify Shipping Address

Attention: Cristina Natale

*Distribute by: Qty SpeedChart:

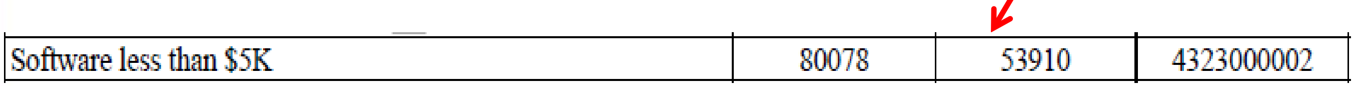
Accounting Lines

Customize | Find | View All |
First 1 of 1 Last
Chartfields1
Chartfields2
Chartfields3
Details
Asset Information

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		E-E-409	1.0000	100.0000	1.00	LAG01	53910

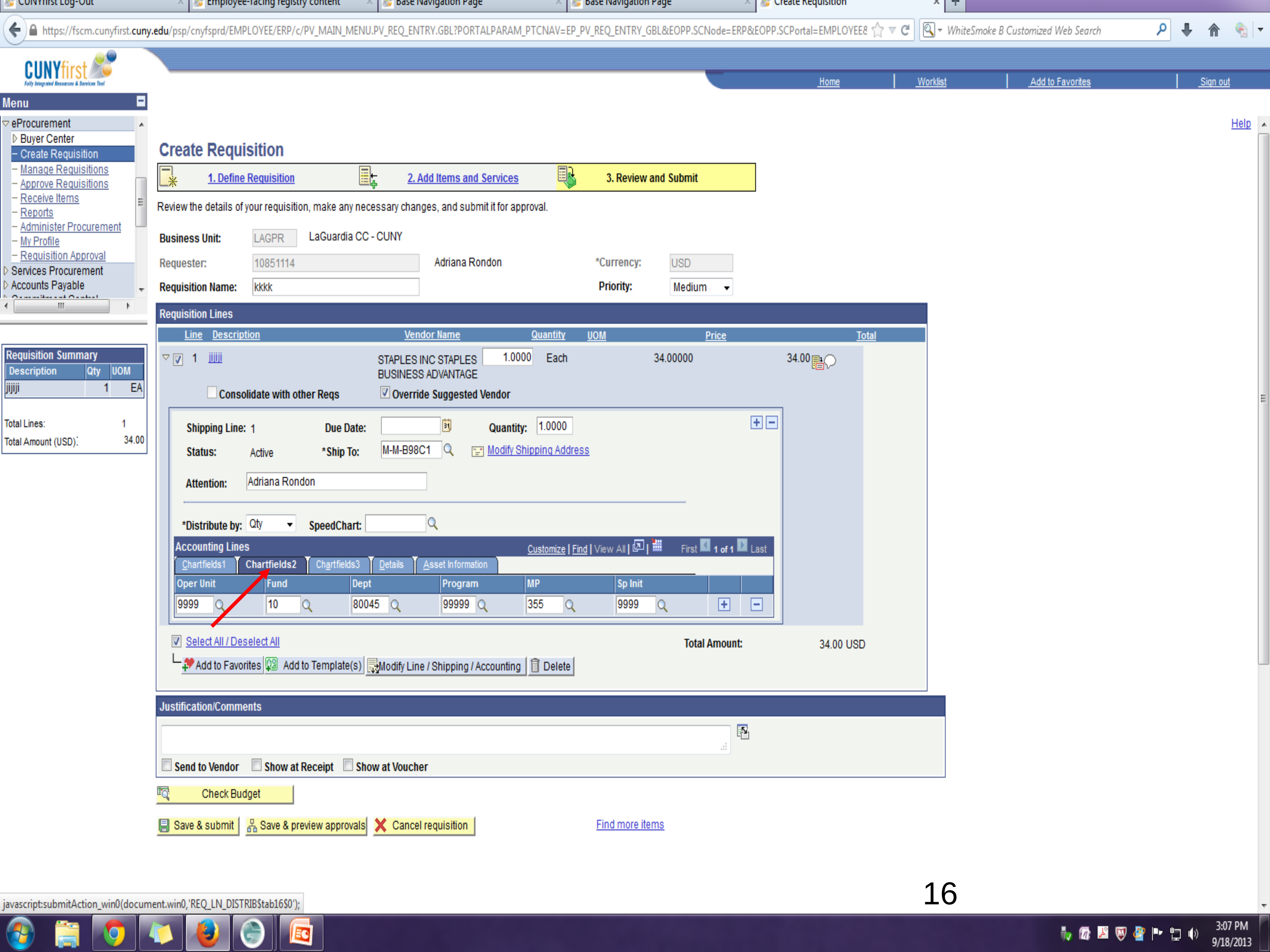
☑ Select All / Deselect All

Total Amount:



Software less than $5K	80078	53910	4323000002

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



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:	10851114	Adriana Rondon	*Currency:	USD
Requisition Name:	kkkk		**Priority:**	Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
☑ 1	jjjjjj	STAPLES INC STAPLES BUSINESS ADVANTAGE	1.0000	Each	34.00000	34.00

☐ Consolidate with other Reqs ☑ Override Suggested Vendor

Shipping Line: 1 **Due Date:** **Quantity:** 1.0000

Status: Active ***Ship To:** M-M-B98C1 Modify Shipping Address

Attention: Adriana Rondon

***Distribute by:** Qty **SpeedChart:**

Accounting Lines

Oper Unit	Fund	Dept	Program	MP	Sp Init
9999	10	80045	99999	355	9999

☑ Select All / Deselect All

Total Amount: 34.00 USD

Requisition Summary

Description	Qty	UOM
jjjjjj	1	EA

Total Lines: 1

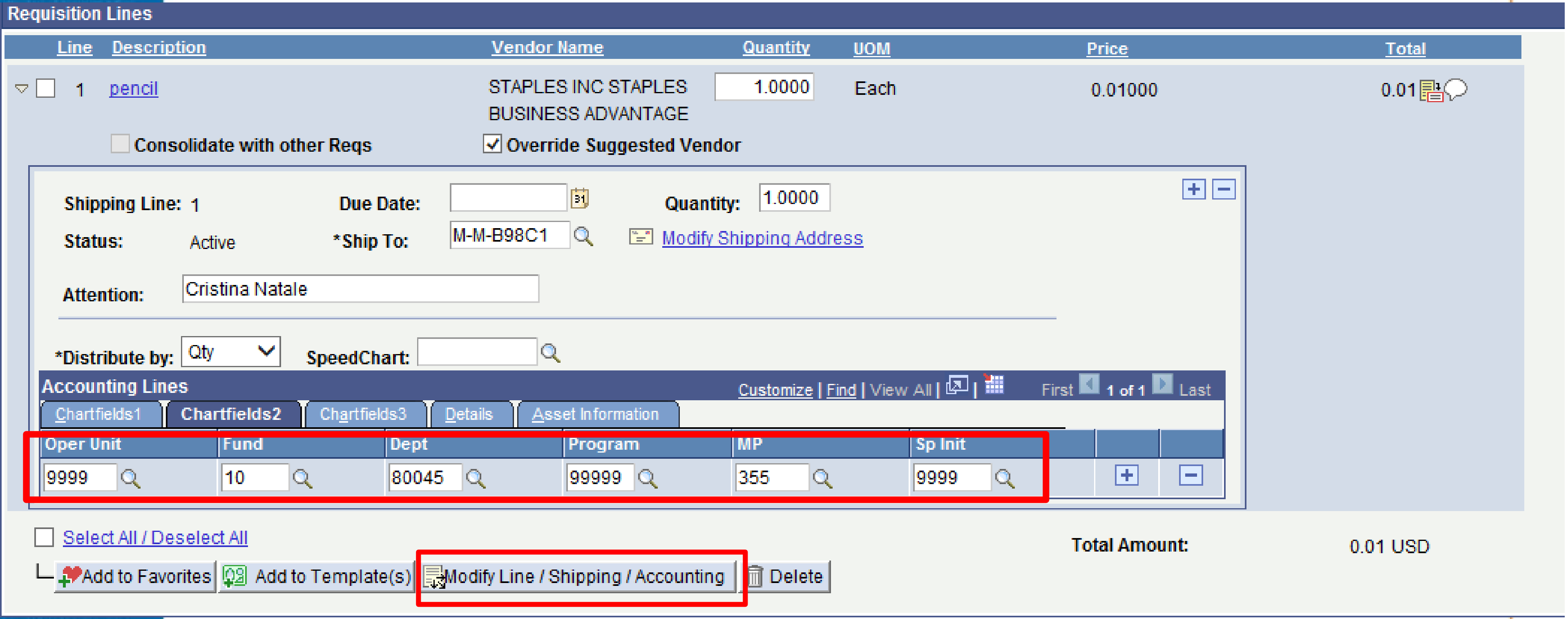
Total Amount (USD): 34.00

Justification/Comments

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

CUNYfirst
Home
Worklist
Add to Favorites
Sign out
Help
Menu
eProcurement
Buyer Center
Create Requisition
Manage Requisitions
Approve Requisitions
Receive Items
Reports
Administer Procurement
My Profile
Requisition Approval
Services Procurement
Accounts Payable
Customize | Find | View All
First 1 of 1 Last
Chartfields1
Chartfields2
Chartfields3
Details
Asset Information
Add to Favorites
Add to Template(s)
Modify Line / Shipping / Accounting
Delete
Check Budget
Save & submit
Save & preview approvals
Cancel requisition
Find more items
javascript:submitAction_win0(document.win0,'REQ_LN_DISTRIB$tab16$0');
3:07 PM
9/18/2013

Chartfields 2


Customize | Find | View All |
First 1 of 1 Last
Chartfields1
Chartfields2
Chartfields3
Details
Asset Information
Add to Favorites
Add to Template(s)
Modify Line / Shipping / Accounting
Delete

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	pencil	STAPLES INC STAPLES BUSINESS ADVANTAGE	1.0000	Each	0.01000	0.01

☐ Consolidate with other Reqs ☑ Override Suggested Vendor

Shipping Line: 1 **Due Date:** **Quantity:** 1.0000

Status: Active ***Ship To:** M-M-B98C1 Modify Shipping Address

Attention: Cristina Natale

***Distribute by:** Qty **SpeedChart:**

Accounting Lines

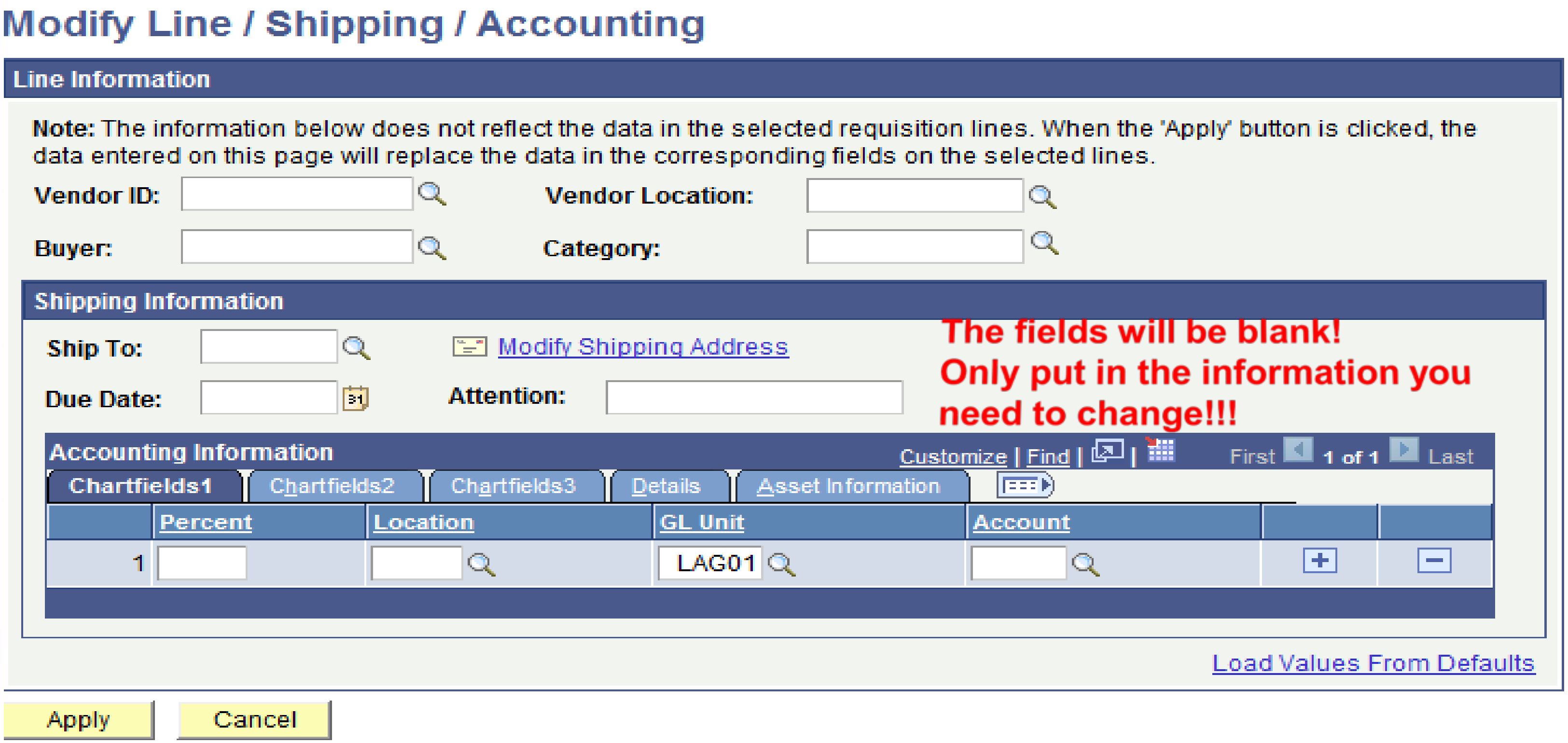
Oper Unit	Fund	Dept	Program	MP	Sp Init
9999	10	80045	99999	355	9999

☐ Select All / Deselect All

Total Amount: 0.01 USD

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

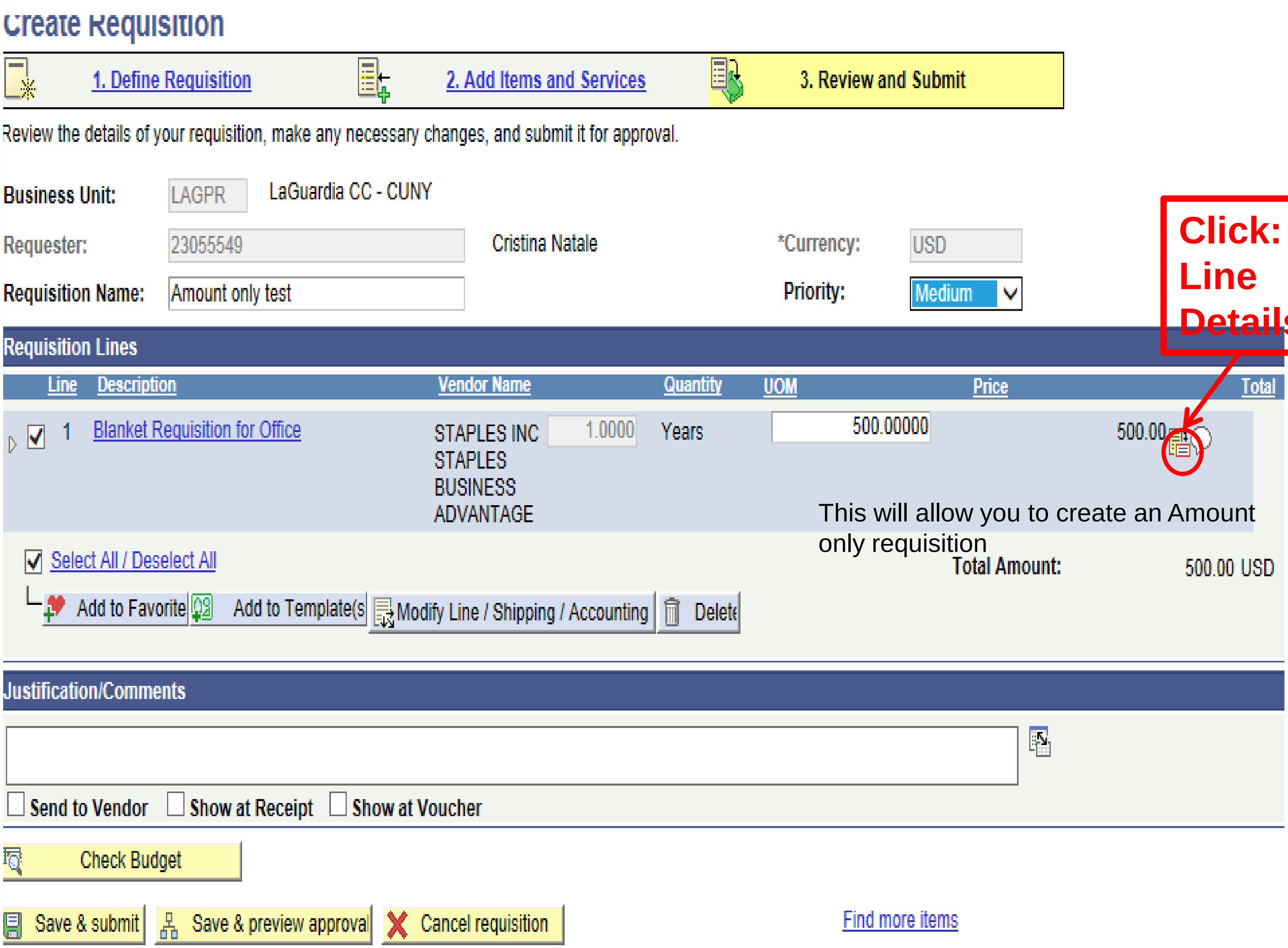
Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

	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.



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: 23055549 Cristina Natale

*Currency: USD

Requisition Name: Amount only test

Priority: Medium

Requisition Lines

	Line	Description	Vendor Name	Quantity	UOM	Price	Total
☑	1	Blanket Requisition for Office	STAPLES INC STAPLES BUSINESS ADVANTAGE	1.0000	Years	500.00000	500.00

☑ Select All / Deselect All

Total Amount: 500.00 USD

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

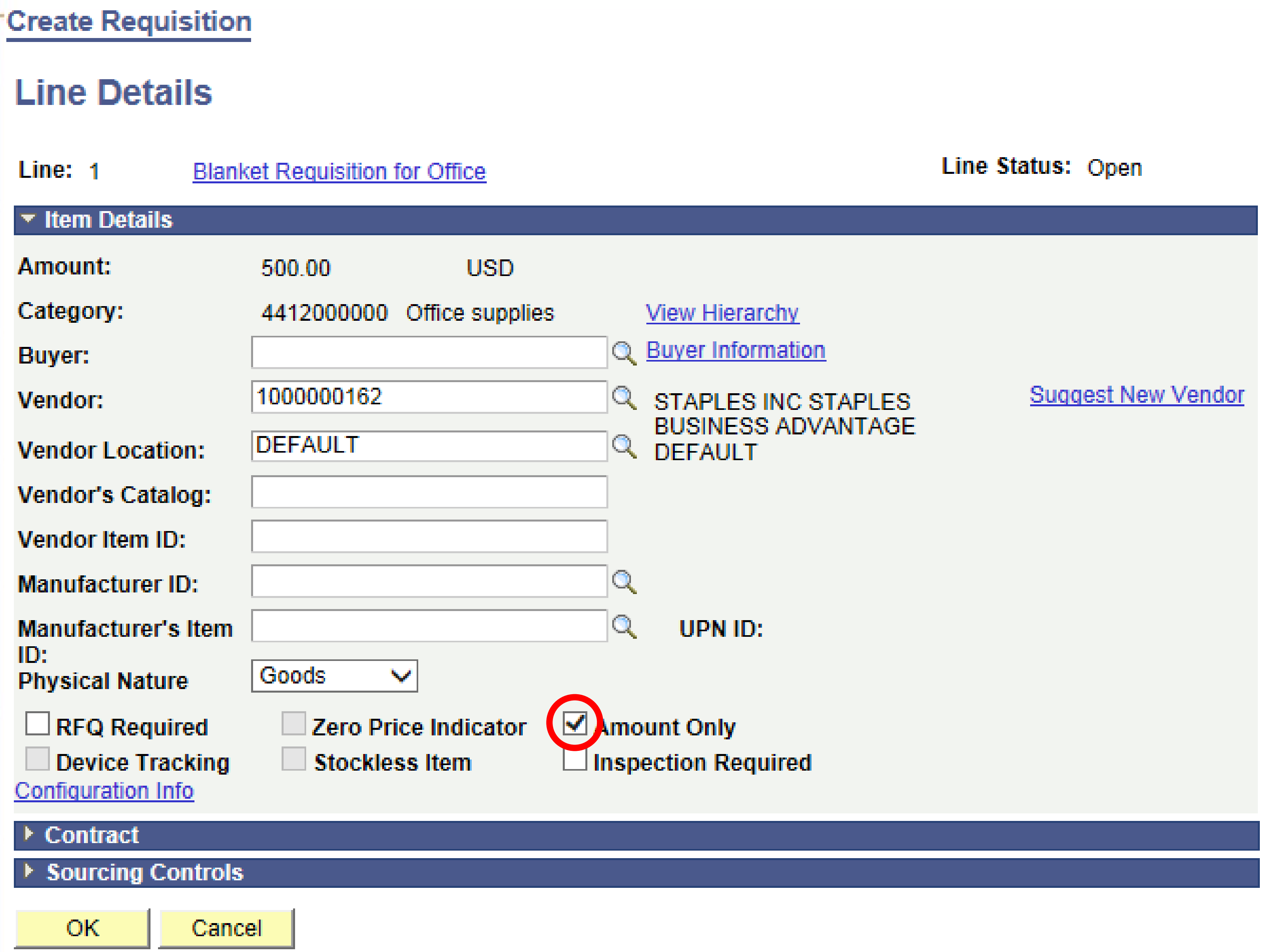
Justification/Comments

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

Check Budget
Save & submit
Save & preview approvals
Cancel requisition
Find more items

Click: Line Details

This will allow you to create an Amount only requisition



Create Requisition

Line Details

Line: 1 Blanket Requisition for Office **Line Status:** Open

Item Details

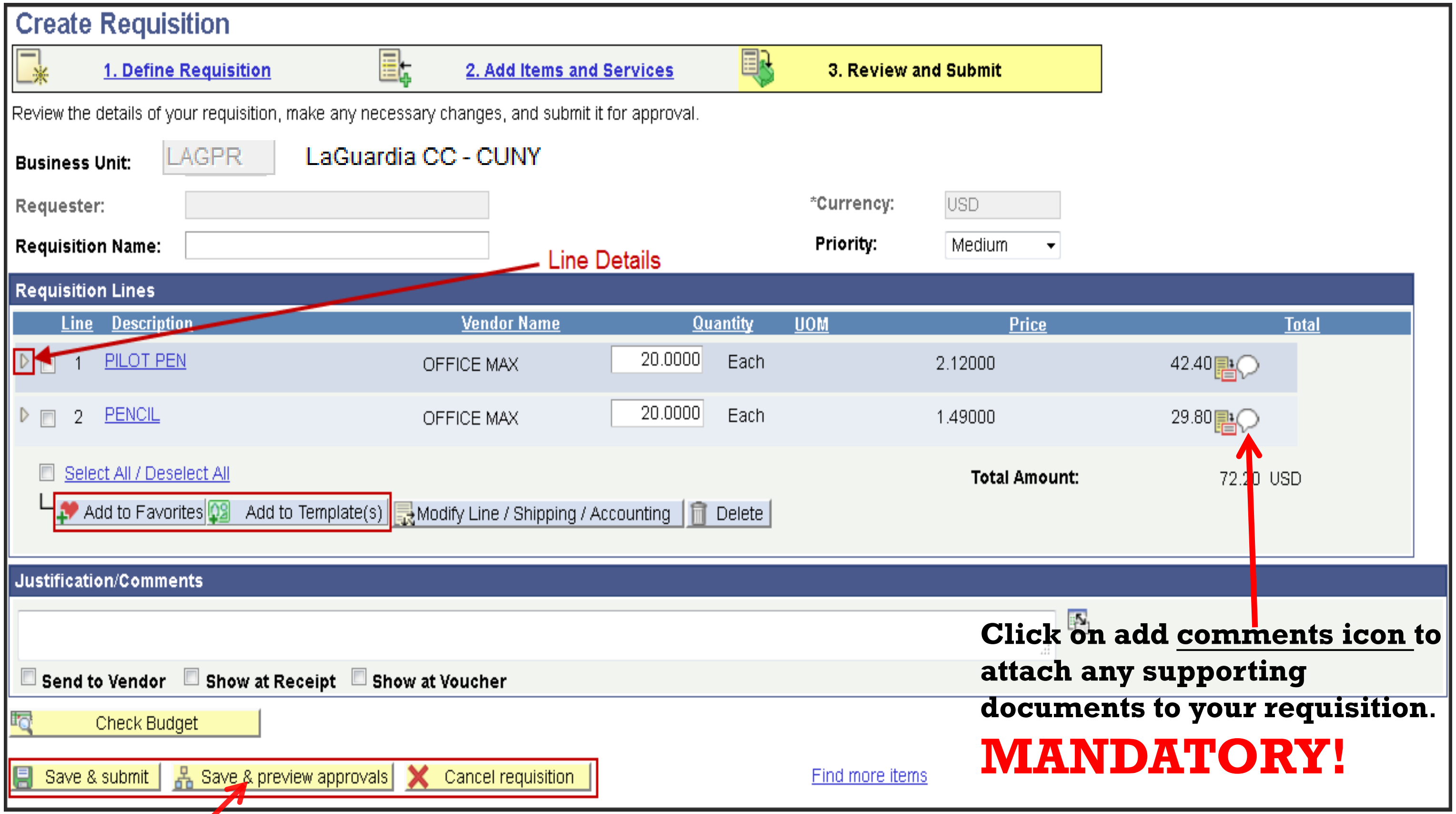
Amount:	500.00 USD	
Category:	4412000000 Office supplies	View Hierarchy
Buyer:		Buyer Information
Vendor:	1000000162	STAPLES INC STAPLES BUSINESS ADVANTAGE DEFAULT
Vendor Location:	DEFAULT	
Vendor's Catalog:		
Vendor Item ID:		
Manufacturer ID:		
Manufacturer's Item ID:		**UPN ID:**
Physical Nature	Goods	

Suggest New Vendor

☐ RFQ Required ☐ Zero Price Indicator ☑ Amount Only

☐ Device Tracking ☐ Stockless Item ☐ Inspection Required

Configuration Info



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:

Requisition Name:

***Currency:** USD

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

Total Amount: 72.20 USD

☐ Select All / Deselect All

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

Justification/Comments

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

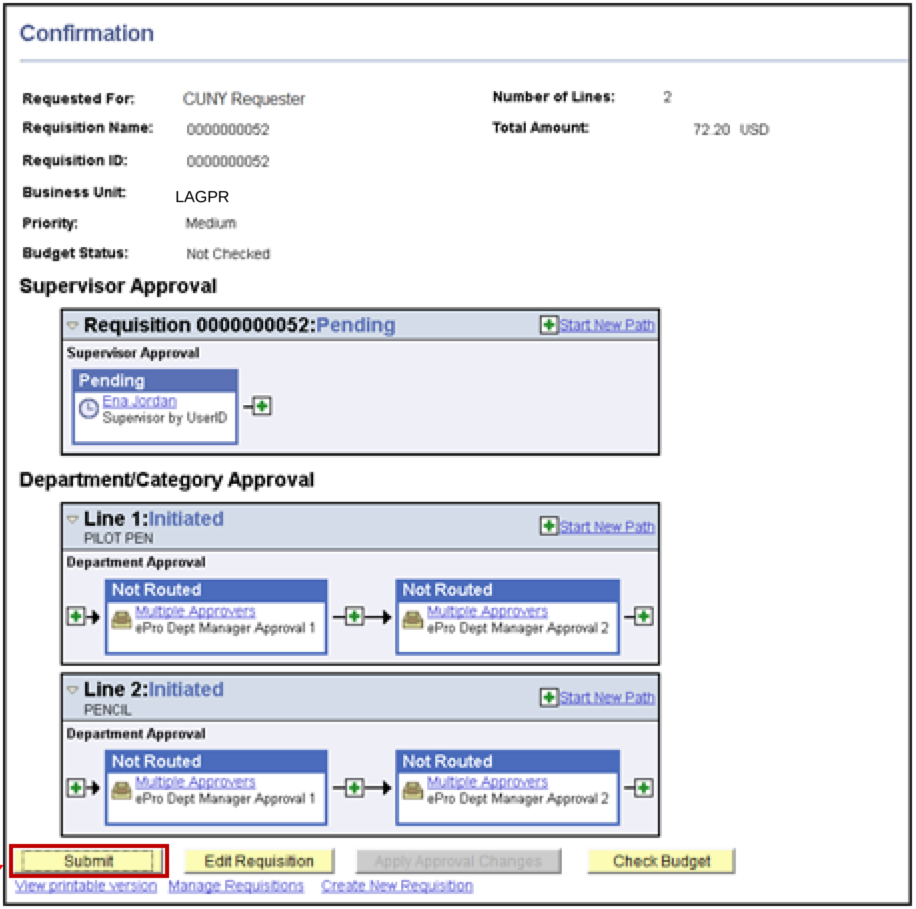
Check Budget
Save & submit
Save & preview approvals
Cancel requisition
Find more items

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**

3. Review and Submit



Confirmation

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

Supervisor Approval

Requisition 0000000052:Pending
Supervisor Approval
Pending
Ena Jordan
Supervisor by UserID

Department/Category Approval

Line 1:Initiated
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
PENCIL
Department Approval
Not Routed
Multiple Approvers
ePro Dept Manager Approval 1
Not Routed
Multiple Approvers
ePro Dept Manager Approval 2

Start New Path
Start New Path
Start New Path
Submit
Edit Requisition
Apply Approval Changes
Check Budget
View printable version
Manage Requisitions
Create New Requisition

CLICK!

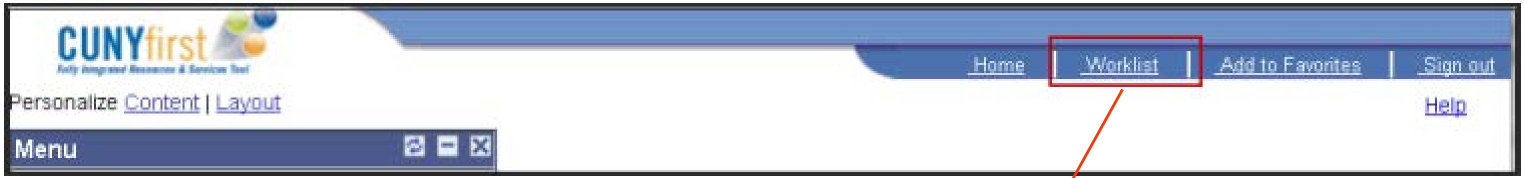
- **Submit**
  - Click to submit requisition to the approval workflow
- **Edit Requisition:**
  - To access the edit page, where you can make update the requisition and submit it again
- **Approval workflows**
  - Triggers when requesters *submits* a requisition, and a set of approvers act on the request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

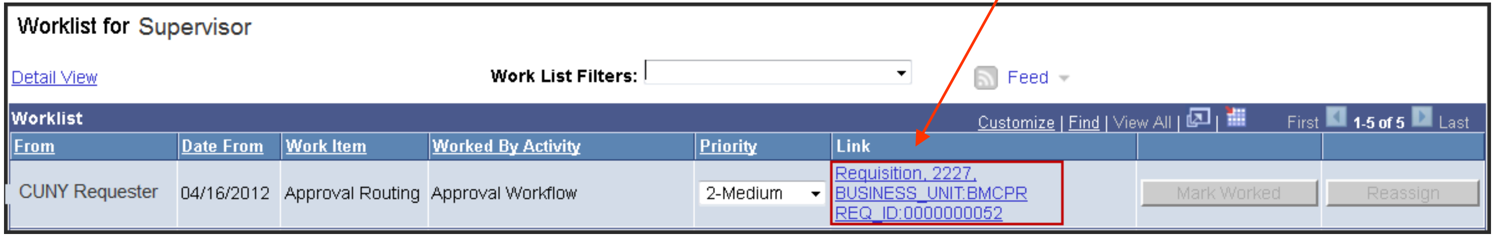
How does my requisition get approved?

Requisitions Approval Policies

- Regardless of position - ***Self-approvals*** of requisitions are ***not permitted*** in CUNY.
- Requisitions will be ***routed*** for appropriate supervisor, departmental Level 1 and Level 2 approvals before the purchasing departments begins the process to obtain the requested goods and services.
- **Specific approvers are also required** for procurement **categories** related to **IT** (information technology), facilities, **hazardous materials**, and **legal services.**

Approver’s Worklist


CUNYfirst
Fully Integrated Resources & Services Tool
Personalize Content | Layout
Menu
Home
Worklist
Add to Favorites
Sign out
Help


Worklist for Supervisor

Detail View
Work List Filters:
Feed
Customize | Find | View All
First 1-5 of 5 Last

Worklist

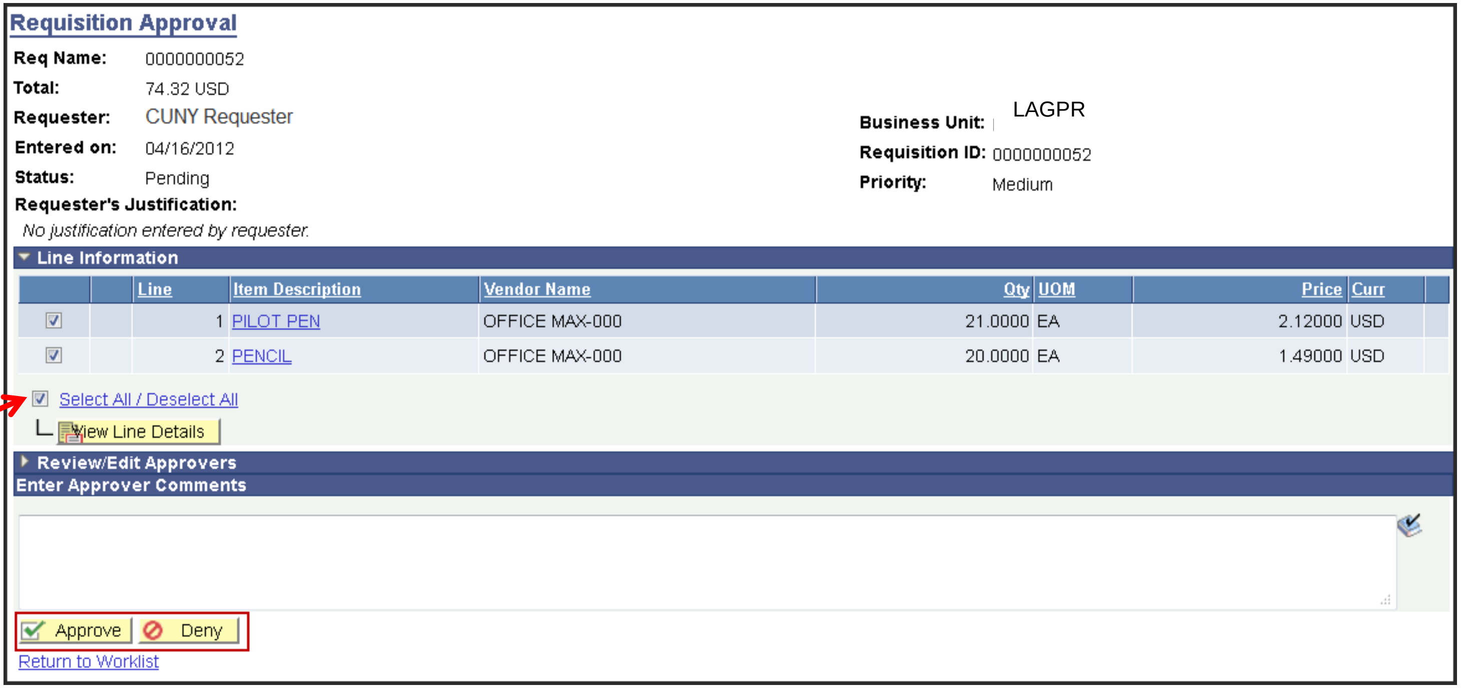
From	Date From	Work Item	Worked By Activity	Priority	Link		
CUNY Requester	04/16/2012	Approval Routing	Approval Workflow	2-Medium	Requisition, 2227, BUSINESS_UNIT:BMCPR REQ_ID:0000000052	Mark Worked	Reassign

A ***workflow notification*** is generated and an ***email*** and ***work-list*** entry is created for the approver.

Worklist: Approver can click the **link** that corresponds to the requisition ID that they want to approve

If you do not receive a link, you can periodically sign in to CUNYfirst to check your worklist!

Supervisor Approval



Requisition Approval

Req Name: 0000000052
Total: 74.32 USD
Requester: CUNY Requester
Entered on: 04/16/2012
Status: Pending
Requester's Justification:
No justification entered by requester.

Business Unit: LAGPR
Requisition ID: 0000000052
Priority: Medium

Line Information

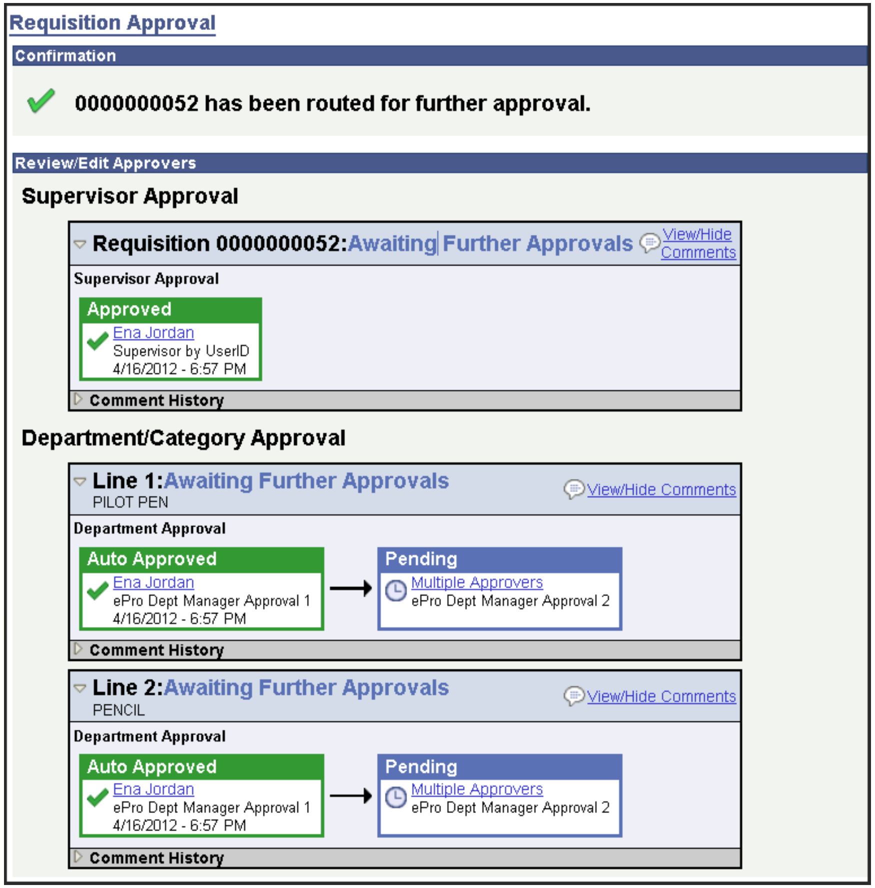
		Line	Item Description	Vendor Name	Qty	UOM	Price	Curr
☑		1	PILOT PEN	OFFICE MAX-000	21.0000	EA	2.12000	USD
☑		2	PENCIL	OFFICE MAX-000	20.0000	EA	1.49000	USD

☑ Select All / Deselect All

View Line Details
Review/Edit Approvers
Enter Approver Comments
Approve
Deny
Return to Worklist

- ❖ **Select All (link)** : Click to select all the line in a Requisition to approve or deny.
- ❖ **Approve** - Select to move the workflow onto the next step or path.
- ❖ **Deny** - Select to send the requisition back to the Requisitioner with the status of denied.

Requisitions Approval Workflow



Requisition Approval

Confirmation

✓ 0000000052 has been routed for further approval.

Review/Edit Approvers

Supervisor Approval

Requisition 0000000052:Awaiting Further Approvals View/Hide Comments

Supervisor Approval

Approved
✓ Ena Jordan
Supervisor by UserID
4/16/2012 - 6:57 PM

Comment History

Department/Category Approval

Line 1:Awaiting Further Approvals View/Hide Comments
PILOT PEN

Department Approval

Auto Approved
✓ Ena Jordan
ePro Dept Manager Approval 1
4/16/2012 - 6:57 PM

→

Pending
Multiple Approvers
ePro Dept Manager Approval 2

Comment History

Line 2:Awaiting Further Approvals View/Hide Comments
PENCIL

Department Approval

Auto Approved
✓ Ena Jordan
ePro Dept Manager Approval 1
4/16/2012 - 6:57 PM

→

Pending
Multiple Approvers
ePro Dept Manager Approval 2

Comment History

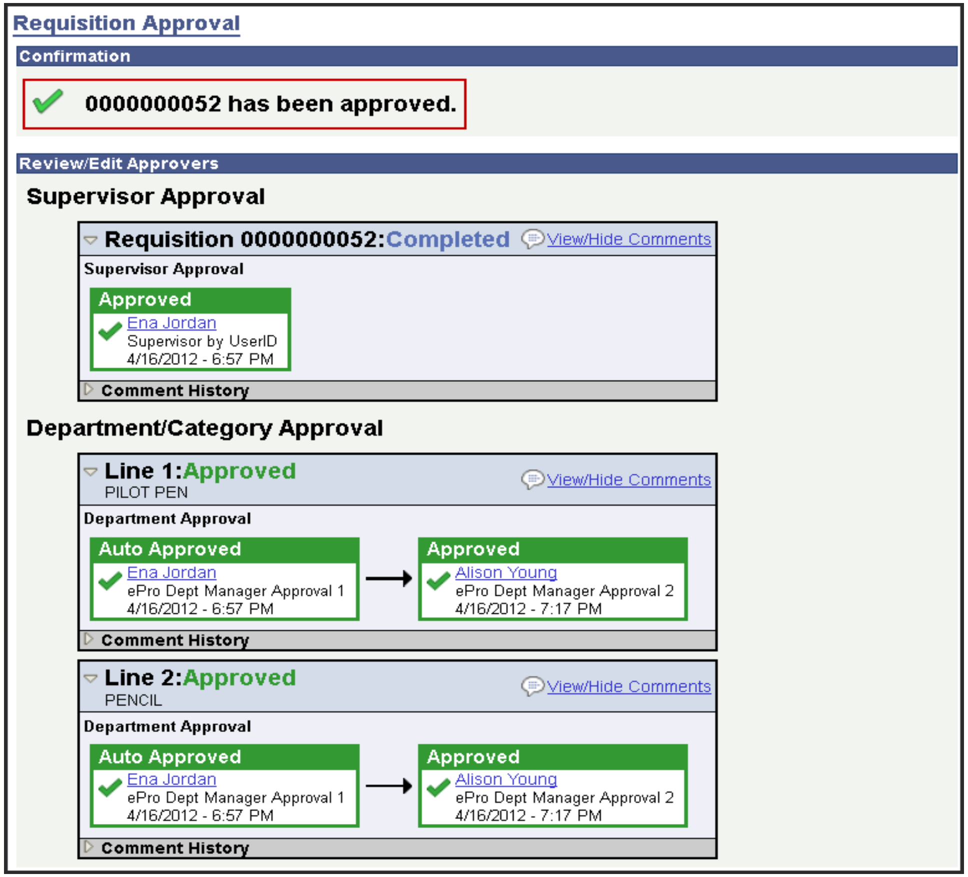
→Supervisor Approves

→Department Approver (Level 1 and Level 2)

→Category Approver (IT, Hazardous Material, Legal Services) if applicable

Approved
Pending Approval
Denied

Fully Approved Requisition



Requisition Approval

Confirmation

✓ 0000000052 has been approved.

Review/Edit Approvers

Supervisor Approval

Requisition 0000000052:Completed View/Hide Comments

Supervisor Approval

Approved
✓ Ena Jordan
Supervisor by UserID
4/16/2012 - 6:57 PM

Comment History

Department/Category Approval

Line 1:Approved View/Hide Comments
PILOT PEN

Department Approval

Auto Approved
✓ Ena Jordan
ePro Dept Manager Approval 1
4/16/2012 - 6:57 PM

→

Approved
✓ Alison Young
ePro Dept Manager Approval 2
4/16/2012 - 7:17 PM

Comment History

Line 2:Approved View/Hide Comments
PENCIL

Department Approval

Auto Approved
✓ Ena Jordan
ePro Dept Manager Approval 1
4/16/2012 - 6:57 PM

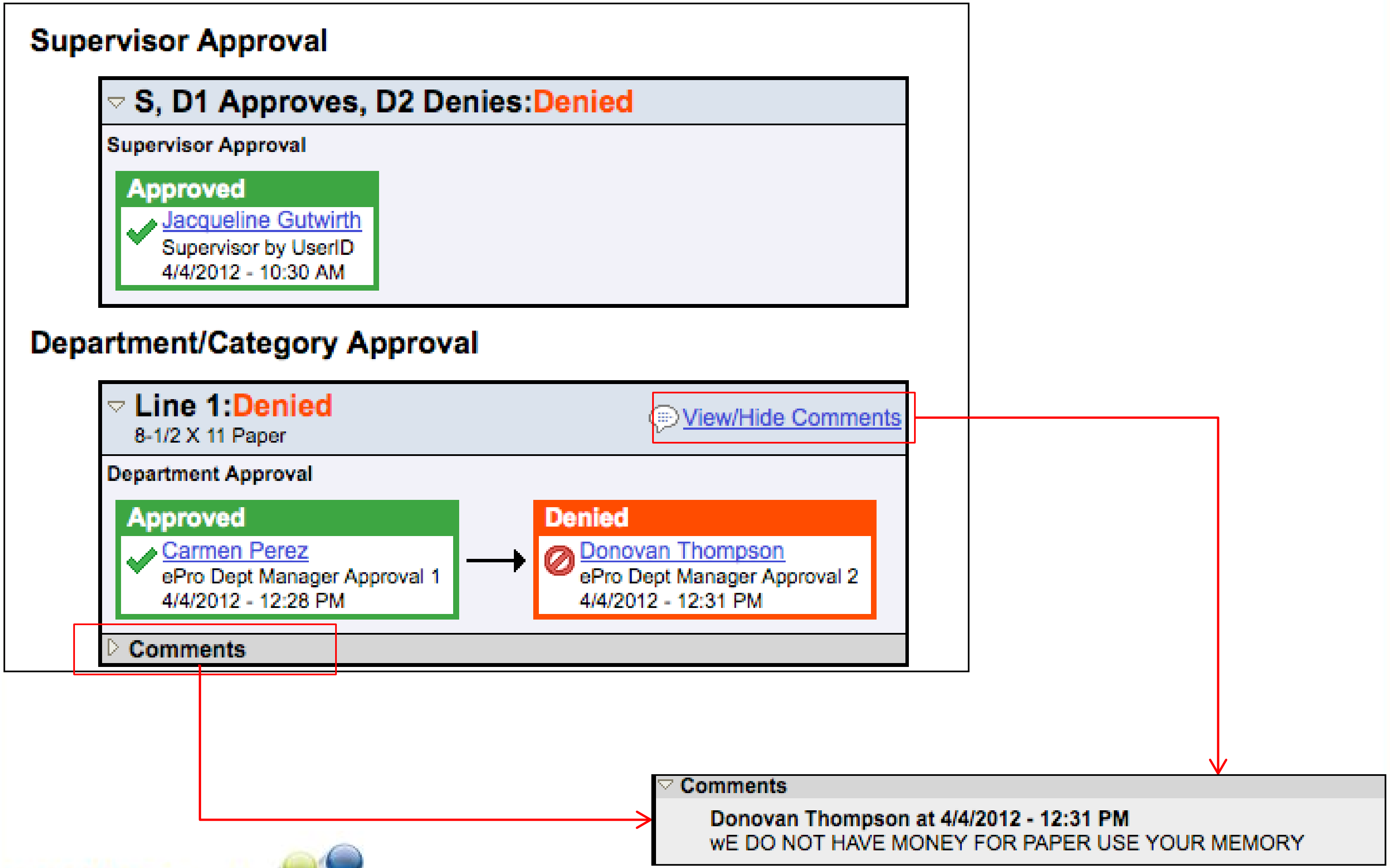
→

Approved
✓ Alison Young
ePro Dept Manager Approval 2
4/16/2012 - 7:17 PM

Comment History

- Once Requisition is **Fully Approved** Requisition can now be *budget checked either manually or via batching through the system.* *Your requisition is now ready to be converted into a purchase order (NOTE: This process does not happen instantly)*

Sample Denied Requisition



Supervisor Approval

S, D1 Approves, D2 Denies:Denied

Supervisor Approval

Approved
✓ Jacqueline Gutwirth
Supervisor by UserID
4/4/2012 - 10:30 AM

Department/Category Approval

Line 1:Denied
8-1/2 X 11 Paper

View/Hide Comments

Department Approval

Approved
✓ Carmen Perez
ePro Dept Manager Approval 1
4/4/2012 - 12:28 PM

→

Denied
Donovan Thompson
ePro Dept Manager Approval 2
4/4/2012 - 12:31 PM

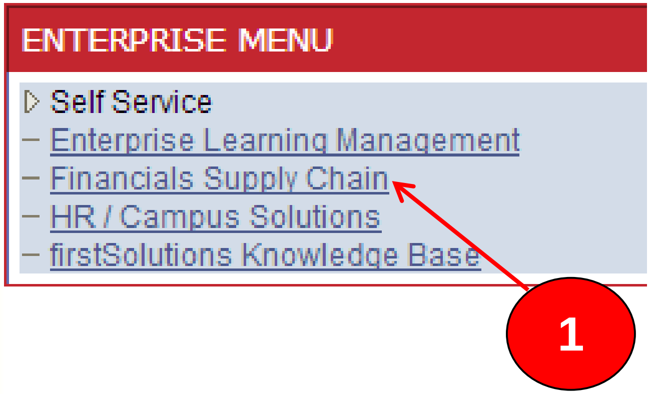
Comments

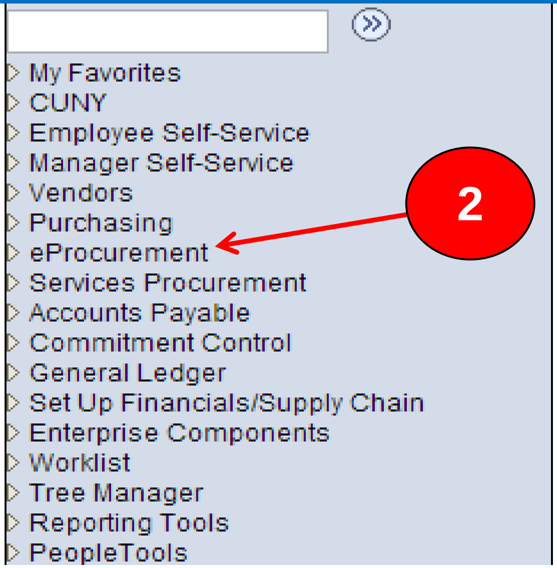
Comments

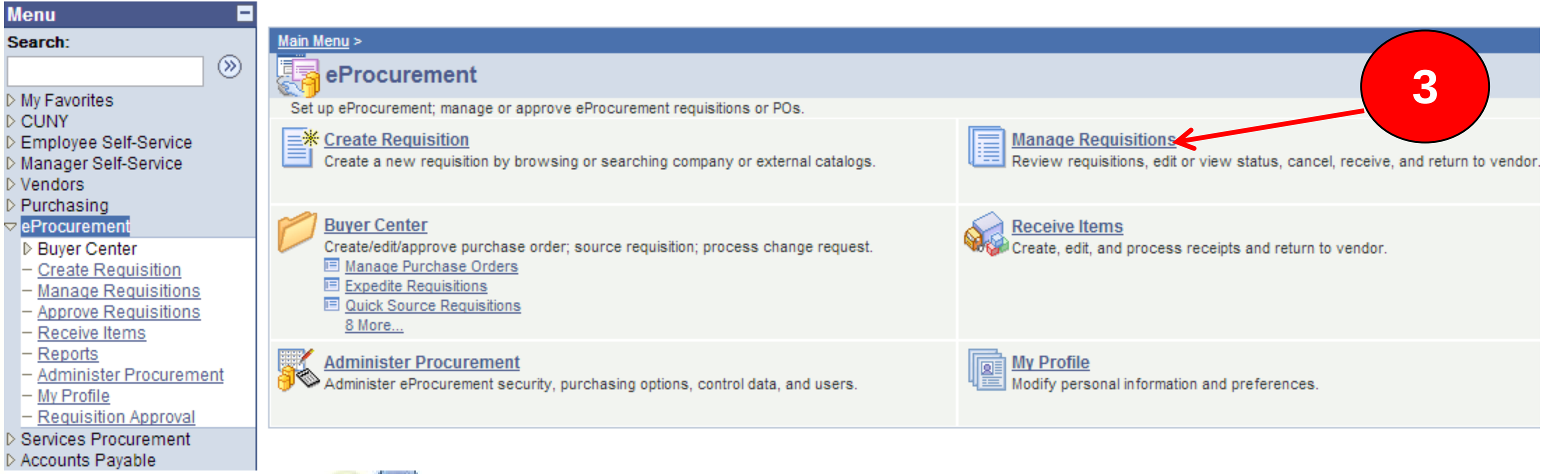
Donovan Thompson at 4/4/2012 - 12:31 PM
wE DO NOT HAVE MONEY FOR PAPER USE YOUR MEMORY

How do I manage my requisition?

Manage Requisitions


ENTERPRISE MENU
Self Service
Enterprise Learning Management
Financials Supply Chain
HR / Campus Solutions
firstSolutions Knowledge Base
1


My Favorites
CUNY
Employee Self-Service
Manager Self-Service
Vendors
Purchasing
eProcurement
Services Procurement
Accounts Payable
Commitment Control
General Ledger
Set Up Financials/Supply Chain
Enterprise Components
Worklist
Tree Manager
Reporting Tools
PeopleTools
2


Menu
Search:
My Favorites
CUNY
Employee Self-Service
Manager Self-Service
Vendors
Purchasing
eProcurement
Buyer Center
Create Requisition
Manage Requisitions
Approve Requisitions
Receive Items
Reports
Administer Procurement
My Profile
Requisition Approval
Services Procurement
Accounts Payable
Main Menu >
eProcurement
3

Set up eProcurement; manage or approve eProcurement requisitions or POs.

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

Manage Requisitions
Review requisitions, edit or view status, cancel, receive, and return to vendor.

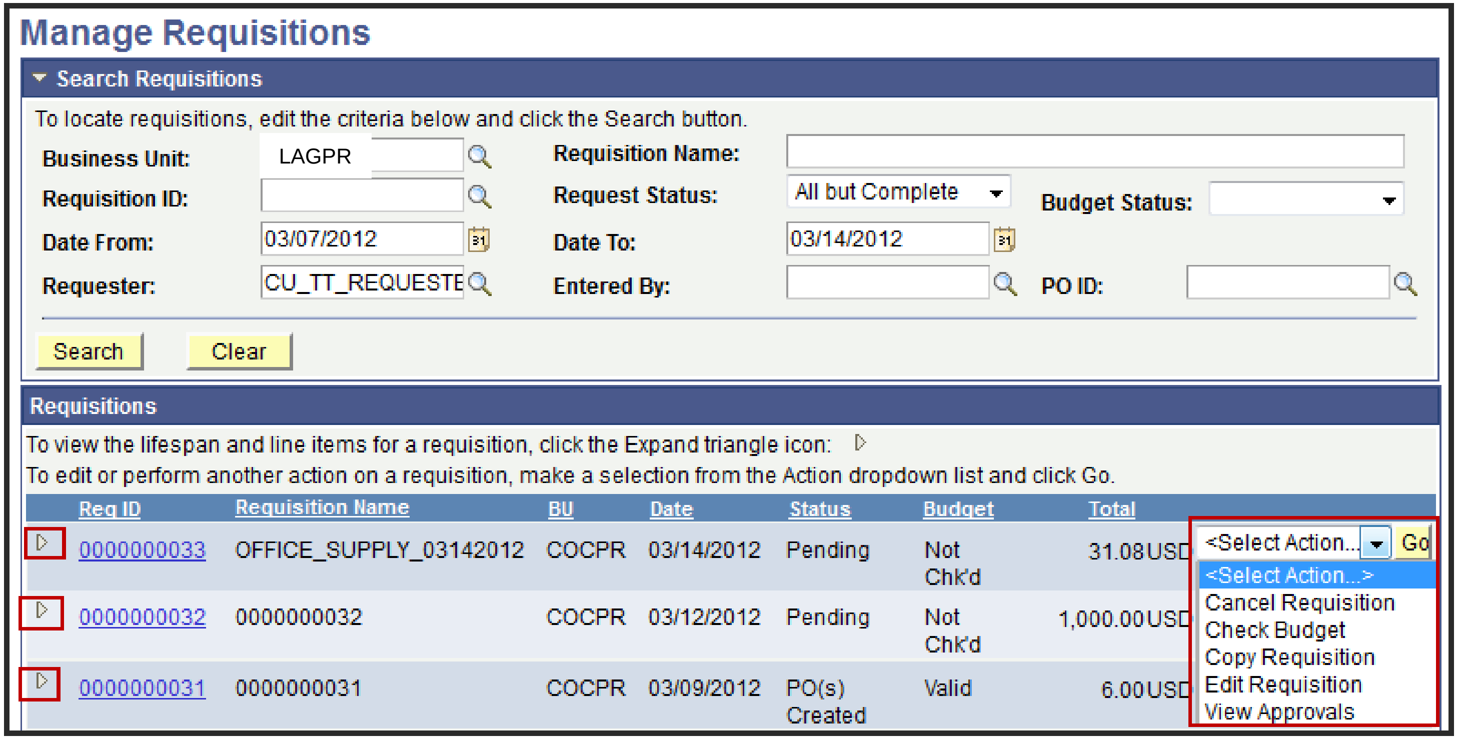
Buyer Center
Create/edit/approve purchase order; source requisition; process change request.
- Manage Purchase Orders
- Expedite Requisitions
- Quick Source Requisitions
- 8 More...

Receive Items
Create, edit, and process receipts and return to vendor.

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

My Profile
Modify personal information and preferences.

Manage Requisitions



Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: LAGPR
Requisition Name:
Requisition ID:
Request Status: All but Complete
Budget Status:
Date From: 03/07/2012
Date To: 03/14/2012
Requester: CU_TT_REQUESTE
Entered By:
PO ID:

Search
Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

	Req ID	Requisition Name	BU	Date	Status	Budget	Total
▷	0000000033	OFFICE_SUPPLY_03142012	COCPR	03/14/2012	Pending	Not Chk'd	31.08USD
▷	0000000032	0000000032	COCPR	03/12/2012	Pending	Not Chk'd	1,000.00USD
▷	0000000031	0000000031	COCPR	03/09/2012	PO(s) Created	Valid	6.00USD

<Select Action... Go
<Select Action...>
Cancel Requisition
Check Budget
Copy Requisition
Edit Requisition
View Approvals

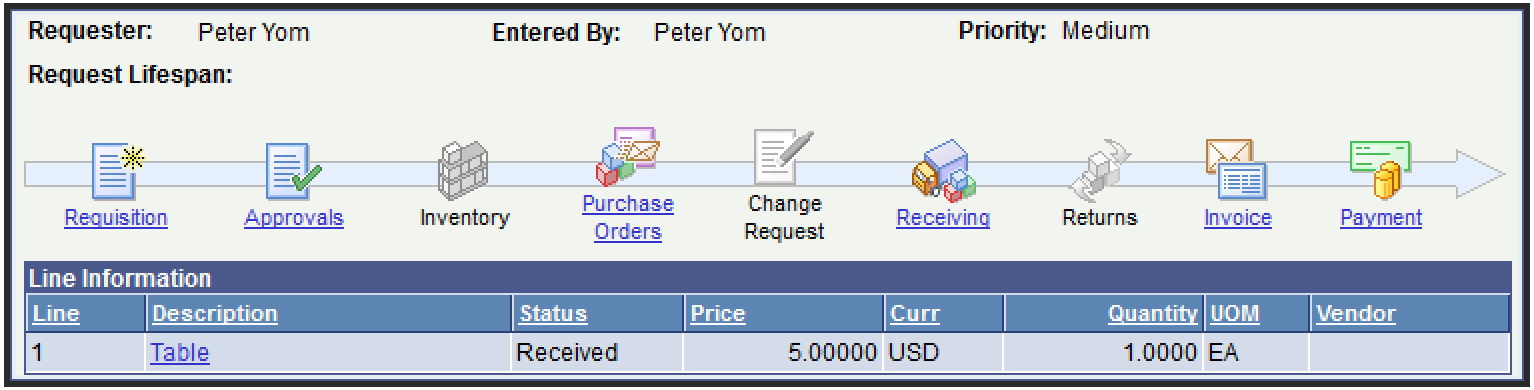
Clear the Date From and the Date To fields so that all your requisitions appear
Next Click the Expand button to view the LifeSpan of your requisition

CUNYfirst
Fully Integrated Resources & Services Tool

Lifespan

- Visual overview of the requisition progress
  - Where the requisition is currently in its life span.
  - links will become **active** as that step in the procurement process is completed.

.

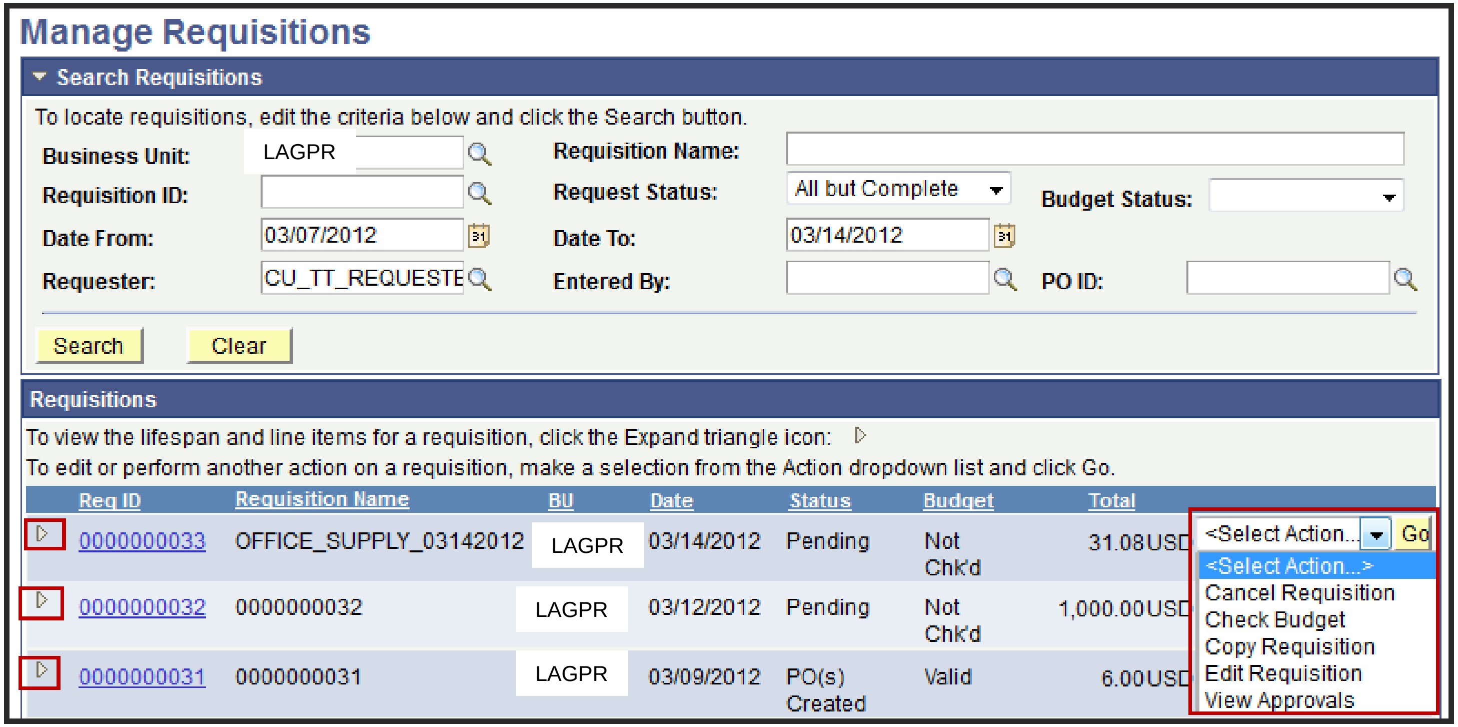

Requisition
Approvals
Inventory
Purchase Orders
Change Request
Receiving
Returns
Invoice
Payment

Requester: Peter Yom **Entered By:** Peter Yom **Priority:** Medium

Request Lifespan:

Line Information

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	Table	Received	5.00000	USD	1.0000	EA	



Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: LAGPR
Requisition Name:
Requisition ID:
Request Status: All but Complete
Budget Status:
Date From: 03/07/2012
Date To: 03/14/2012
Requester: CU_TT_REQUESTE
Entered By:
PO ID:

Requisitions

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▷	0000000032	0000000032	LAGPR	03/12/2012	Pending	Not Chk'd	1,000.00USD
▷	0000000031	0000000031	LAGPR	03/09/2012	PO(s) Created	Valid	6.00USD

- **If your requisition status is "OPEN" it means that it has not been routed to your Supervisor and will not get approved**
- **Requisition MUST have a status of "PENDING" to be routed to Approver, approval changes status to "APPROVED"**
- **The Budget status MUST be "VALID" for a purchase order to be generated**
- **If the Budget status is "ERROR" you must Edit Requisition and check the chartfields to make sure the Account and Department fields are correct. Check your Budget FIRST!**
- **The available actions vary depending on the status of the requisition.**

Tips and Tricks

***Select Add to Template(s) when you want to save an entire requisition for future use**

***Select Add to Favorites when you want to save a requisition line to use for future requisitions**

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**

❖**Attach your supporting documents Quotes, Proposals, Estimates etc…**

❖**Manage your requisitions**

THANK YOU!