

9 Fairly Complicated ~~10~~ EASY STEPS TO...

Enter a Requisition

1. Log into CUNYfirst
2. Select “Financials Supply Chain”
3. Select “eProcurement”
4. Select “Create Requisition”
5. PART 1. DEFINE REQUISITION
 - a. Enter a “Requisition Name”
 - i. For OTPS/Department Budget purchases use any appropriate name
Examples:
 - Computers for V817
 - Lumber for CMCE lab
 - Ink for Fall Semester
 - ii. For TECH FEE purchases use the assigned code
Examples:
 - CST 03F12
 - ARCH 01S13
 - iii. For EXTRA OTPS the first word of the name should be “EXTRA” with your description following after
Examples:
 - EXTRA: Tools and hardware
 - EXTRA: Research software for Prof. Reiser
 - b. Expand “Line Defaults” (click on the triangle)
 - i. Under “Shipping Defaults” select the correct “Ship To” location; a full list of locations may be viewed by clicking on the magnifying glass
 - ii. Enter a “Due Date”
 - iii. Enter appropriate information in the “Attention” field
Examples:
 - Hope Reiser, V806, X552
 - Russell Hotzler, N319, X5400
 - iv. Verify the “Accounting Defaults”
 1. If you are using your OTPS/Department Budget do **NOT** make any changes
 2. If you are using TECH FEE select the “Chartfields 2” tab and enter the following information:

| <i>Oper Unit</i> | <i>Fund</i> | <i>Dept</i> | <i>Program</i> | <i>MP</i> | <i>Sp Init</i> |
|------------------|-------------|-------------|----------------|-----------|----------------|
| 3019 | 11 | 80385 | 99999 | 300 | 9999 |
 3. If you are using EXTRA OTPS select the “Chartfields 2” tab and enter the following information:

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|------------------|-------------|-------------|----------------|-----------|----------------|
| 9999 | 10 | 10385 | 99999 | 100 | 9999 |

c. Select "Add Items and Services"

6. PART 2. ADD ITEMS AND SERVICES

a. Select "Special Requisitions" tab

b. Select "Special Item"

NOTE: You will ALWAYS use "Special Item"; all other options are invalid.

c. Complete the following fields:

- Item Description
- Price
- Quantity
- Unit of Measure (click on the magnifying glass for a complete list of options)
- Category (further details below, item i)
- Vendor ID (further details below, item ii)

i. CATEGORY

1. Select the magnifying glass
2. In the "Look Up Category" screen change the "Search By" selection from "Category" to "**Description**"
3. Enter a word in the search field
4. Select "Find" (do not hit enter/return on the keyboard)
5. Select the appropriate item from the generated list

ii. VENDOR ID

1. Select the magnifying glass
2. In the "Vendor Search" screen enter information in the "Name" field
3. Select "Find" (do not hit enter/return on the keyboard)
4. Select the appropriate vendor from the generated list

d. Add any notes or comments in the "Additional Information" field


e. When complete, select "Add Item" to add this item to the requisition

To verify that the item was added to the requisition check the "Requisition Summary" in the column to the left

f. To add additional items return to step #5c, above

g. If you have no additional items to add select "Review and Submit"

7. PART 3. REVIEW AND SUBMIT

a. To add attachments select the "talk bubble"  next to a particular line item

i. In the "Line Comments" screen select "Add Attachment"

ii. In the new window select "Browse"

iii. In the file window find and select the correct file

iv. Select "Open"

v. Select "Upload"

1. If you have additional attachments for this item return to step #6ai

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2. If you have no additional attachments for this item select "OK"
- vi. If you have additional attachments for other items return to step #6a
- b. Add any notes or comments in the "Justification/Comments" field
- c. Re-verify accounting
 - i. If you are using your OTPS/Department Budget do **NOT** make any changes
 - ii. If you are using TECH FEE complete the following steps:

1. Select the box next to "Select All/Deselect All" so that all line items on the requisition are checked
2. Select "Modify Line/Shipping/Accounting" button:
3. Select the "Chartfields 2" tab and enter the following information:

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|------------------|-------------|-------------|----------------|-----------|----------------|
| 3019 | 11 | 80385 | 99999 | 300 | 9999 |

4. Select "Apply"
 5. Select "All Distribution Lines"
 6. Select "OK"
- iii. If you are using EXTRA OTPS complete the following steps:

1. Select the box next to "Select All/Deselect All" so that all line items on the requisition are checked
2. Select "Modify Line/Shipping/Accounting" button:
3. Select the "Chartfields 2" tab and enter the following information:

| <i>Oper Unit</i> | <i>Fund</i> | <i>Dept</i> | <i>Program</i> | <i>MP</i> | <i>Sp Init</i> |
|------------------|-------------|-------------|----------------|-----------|----------------|
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4. Select "Apply"
 5. Select "All Distribution Lines"
 6. Select "OK"
8. When complete, select "Save and Preview Approvals"
Check that the "Supervisor Approval" box lists your supervisor/approver
 - a. If it is correct, select "approve"
 - b. If it is incorrect, select "Edit Requisition" and contact the appropriate parties to help correct the CUNYfirst information

NOTE: The requisition has been saved and you may return to it once the problem has been solved; select "eProcurement" and then "Manage Requisitions"
 9. Start your next requisition