Create Requisition – Goods and Services

CUNY acquires goods and services through competitive selection.
All Requesters are required to create a requisition for all received goods and services.

Requisitions are created in three stages.

1. Define Requisition
2. Add Items and Services
3. Reviewing and Submitting

It is highly recommended that Requesters run the CU_FSPO_STA_BUDGET_OVERVIEW query to confirm the general availability of funds prior to creating a requisition. If there are not sufficient funds, contact the Budget Office.

Step	Action
1.	Enter ***https://home.cunyfirst.cuny.edu*** in your browser's address bar: • Enter your Username and Password and click the **Log In** button. • From the **Enterprise Menu**, select the **Financials Supply Chain** link.
2.	Navigate to: ***eProcurement > Create Requisition***.
3.	The **1. Define Requisition** page displays. Optionally, in the **Requisition Name** field, enter a name to identify this requisition as it flows through CUNYfirst.
4.	On the **Priority** dropdown menu, as needed, select a priority for the requisition. ***Note: Leave the default of Medium for all requisitions except in the actual rare circumstance when a high priority exists.***
5.	Click the **Line Defaults** expand icon. ***Note: These fields apply to every line on the requisition and may be overwritten on the line, schedule or distribution level.*** ***Note: Usually, the Vendor and Unit of Measure are entered here for multiple line requisitions.*** ***Note: When acting as a Creator on behalf of a Requester, Chartfields are edited on the 3. Review and Submit page.***
6.	In the **Vendor** field, enter or look up the Vendor. ***Note: The Vendor is not required.*** ***Note: It is recommended to have one Vendor per requisition.*** ***Note: If the Vendor is not found, then enter a suggested Vendor in the Additional Information textbox. Only those Vendors already in SFS may be processed.*** ***Note: Purchasing is responsible for selecting the Vendor on the Purchase Order.***
7.	On the **Vendor Search** page, enter known search criteria.
8.	Click the **Find** button.
9.	If more than one **Vendor ID** meets the search criteria, then to ensure the correct vendor is selected, click the **Vendor Details** icon to get more information about the vendor.
10.	Select the **Vendor ID** link of the correct vendor.
11.	In the **Unit of Measure** field, enter the correct value. ***Note: For Amount Only requisitions, select EA.***

12.	Click the **Continue** button. The **2. Add Items and Services** page displays on the **Special Request** tab.
13.	Click the **Special Item** link to enter the six required (with an * asterisk) fields for each line item.
14.	In the **Special Item** section in the **Item Description** field, enter a full description of the item.
15.	In the **Price** field, enter the amount using only numerals and the decimal point quoted for the item.
16.	In the **Currency** field, as needed, overwrite USD in the **3. Review and Submit** stage.
17.	In the **Quantity** field, enter the number of items as it relates to the Unit of Measure. ***Note: For Amount Only requisitions, enter a quantity of 1.***
18.	In the **Unit of Measure** field, enter the correct value. ***Note: This would be duplicated if the UOM is entered on the 1. Define Requisition page.*** ***Note: For Amount Only requisitions, select EA.***
19.	In the **Category** field, enter or look up the **Category** number.
20.	On the **Look Up Category** page in the **Search Categories** section **Search By** dropdown menu, select the **Description** list item.
21.	In the field to the right of the **Search By** dropdown menu, enter a Search string such as COMP for a computer related request. ***Note: The wildcard (%) may be entered before and after the search string to find any Category containing the letters in the search string.***
22.	Click the **Find** button.
23.	In the **Categories** section, select any link on the correct row. ***Note: The matching expense code displays in the Chartfields.*** ***Note: The Chartfields are used to determine the approval routing including Category approvers.***
24.	Optionally, in the **Due Date** field, enter a preferred delivery date in the mm/dd/yyyy format. Alternatively, select the **Choose a date** icon. On the calendar, click the: a. left dropdown menu, and then click the correct month; b. right dropdown menu icon, and then click the correct year; and lastly, c. correct day of the month.
25.	In the **Additional Information** field, enter comments. ***Note: When applicable, enter text to confirm that shipping costs are included in the price.***
26.	Select any or all of the checkboxes **Send to Vendor**, **Show at Receipt**, and **Show at Voucher** to indicate where the entered Additional Information will be displayed.
27.	Click the **Add Item** button. The item will display in the **Requisition Summary** box.
28.	In the **Special Item** section, as needed, enter the line details for the next item.

29.	As needed, when shipping costs are not included in the price, then enter a line to cover shipping costs. • In the **Price** field, enter the Vendor's estimate. • In the **Quantity** field, enter **1**. • In the **UOM** field, enter **EA**. • In the **Category** code, enter **7810000000** or look up **Mail and Cargo**. • Select the **Amount Only** checkbox for the shipping line. • Do not select the **Inspection Required** checkbox for the shipping line.
30.	When all line items display in the **Requisition Summary** box, click the **3. Review and Submit** link.
31.	In the **Requisition Lines** section, select the expand icon of each line to review all Item, Shipping and Chartfield details.
32.	As needed to edit these fields of the Requisition, click the **Modify Line/Shipping/Accounting** button.
33.	In the **Accounting Defaults** section, on the **Chartfields 1** and **Chartfields 2** tabs, edit the default values of the users profile when creating a requisition for another Requester.
34.	As needed, to assign the pre-encumbrance to the future budget, select the **Details** tab and in the **Budget Date** field, enter the date of 07/01/20xx where xx are the last two numbers of that Budget Year.
35.	If the goods are to be delivered to a location other than Central Receiving or the location based on the user's default on a one-time basis, then click the **Modify Shipping Address** link.
36.	On the **Shipping Address** page, enter the address where the goods are to be delivered.
37.	Click the **OK** button.
38.	For Amount Only requisitions, select the **Line Details** icon.
39.	Select the **Amount Only** checkbox.
40.	Click the **OK** button.
41.	Click the **Apply** button.
42.	On the **Create Requisition** page, select the **Comments** icon to display the **Justification Comments** section.
43.	In the **Justification/Comments** section, click the **Attach** icon.
44.	The **File Attachment** pop-up window displays. Click the **Browse** button.
45.	Within CUNYfirst, your **Computer** folder displays. Navigate to the document to be uploaded into CUNYfirst.
46.	Click the **Open** button.
47.	Click the **Upload** button.
48.	In the **Justification/Comments** textbox, enter freeform text to identify the attached document.
49.	Select the checkbox/es of **Send to Vendor**, **Shown at Receipt**, and/or **Shown at Voucher** to display the entered comments on related documents.

50.	Click the **Save & preview approvals** button. ***Note: CUNYfirst performs a combination edit to ensure entered Chartfields can be used together.***
51.	The **Confirmation** page displays including the **Requisition ID** and Approval routing.
52.	To add an ad hoc approver, select the **green plus sign** where you want to insert the approver. ***Note: Ad hoc approvers are additional to and not instead of the existing approval workflow.***
53.	On the **Insert additional approver or reviewer** page **Choose an approver or reviewer** section in the **User ID** field, enter or look up the eight digit CUNY ID.
54.	On the **Approver/Review Search** page, in the **Name** field enter the first or last name or, if known, in the **User ID** field, enter the EMPL ID of the ad hoc approver to be added to the approval routing.
55.	Click the **Search** button.
56.	The **Search Results** display on the page. In the **Name** column, select the link that matches the name of the approver.
57.	On the **Insert additional approver or reviewer** page in the **User ID** field, the Empl ID of that person displays.
58.	Select the **Insert as** radio button of **Approver.** ***Note: Choose carefully as all CUNY approvers are available for selection. Choose only those approvers authorized for your Business Unit.*** ***Note: If subsequent changes reinitiate Approval workflow, than the ad hoc approver will need to be manually entered again.***
59.	Click the **Insert** button. The Confirmation page displays with the inserted ad hoc approver.
60.	As needed, repeat steps 52-59 to add additional approvers.
61.	Click the **Multiple Approvers** link to get additional information regarding approvers.
62.	Click the **Save & submit** button. ***Note: The Approver status of the first approver changes from not routed to pending.***
	End of Procedure.

Back to Table of Contents