

Creating Requisitions

BUSINESS OBJECTIVE: CUNY acquires goods and services through a competitive bidding process managed by the Purchasing department. Departments are required to create a requisition stating their business needs. It is strongly recommended that Requesters run the Budget Overview query in CUNYfirst to confirm the general availability of funds **prior** to creating a requisition. If sufficient funds do not exist, requisitions will fail budget checking process and will not route to the Purchasing department. Requesters must contact their Budget Office to correct budget issues.

From the Enterprise Menu, Select the **Financial Supply Chain** link.

Navigate to: eProcurement > Create Requisition. If prompted, enter your Business Unit, Requester (when applicable) and click on **Ok**.

The screenshot shows the 'Create Requisition' page in CUNYfirst. The 'Specify Business Unit' section has a text input field containing 'MEC55'. A green arrow points to the 'OK' button. A red arrow points from the 'MEC55' input field to a 'Look Up Business Unit' pop-up window. The pop-up window has search criteria for 'Business Unit' and 'Description', both set to 'begins with'. It includes 'Look Up', 'Clear', and 'Cancel' buttons, along with a 'Basic Lookup' link. Below the search criteria is a 'Search Results' section with a table:

Business Unit	Description
MEC55	MEC Other Non-Tax Levy
MECPR	Medgar Evers College - CUNY

There are three stages in the creation of a requisition.

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

1. Define Requisition

STEP#1: It is good practice to name your requisition, see example below and click on **Continue**.

2. Add Items and Services

STEP#1: Always click on **1** Special Request tab, then **2** Special Item.

STEP#2: Enter all required information including Item Description, Price, Quantity, Category Code and Unit of Measure. Vendor ID is not required.

Here are the most commonly used category codes:

Code	Descr	Expense Account	Budgetary Account	Inspection Required
441200000	Office supplies	51001	80120	N
601400000	Toys & games	51105	80120	N
4321160002	Computer Accessories<\$5K	53912	80123	Y
4321000102	Computer hardware <\$5K	53912	80123	Y

For complete list of category codes, run query **BUD_CATEGORY_CODES_OTPS_NTL**

STEP#3: Enter Click on **Add Item**.

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Requisition Approval
- Create Requisition
- Manage Requisitions
- Approve Requisitions

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

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:

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

Special Item

*Item Description: FY19 - Computers for Office Staff

*Price: 1000.00000 *Currency: USD

*Quantity: 2.0000 *Unit of Measure: EA

*Category: 4321160002 Due Date:

Vendor ID: [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

STEP#4: The item will display in the Requisition Summary box to your left. The system is ready to enter any additional requisition lines details as needed. For this example, we will review the single item and submit the requisition for approval and budget check. Click on **Review and Submit**.

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Requisition Summary

Description	Qty	UOM
FY19 - Computers for Office...	2	EA
Total Lines:		1
Total Amount (USD):		2,000.00

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:

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

Special Item

*Item Description:

*Price: *Currency: USD

*Quantity: *Unit of Measure:

*Category: Due Date:

Vendor ID: [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

STEP#5: Click on the triangle to the left of the Line Description to see more details

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: MEC55 MEC Other Non-Tax Levy

Requester: 14211180 Gabrielle Keane-Dawes *Currency: USD

Requisition Name: FY19 - Computers Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	FY19 - Computers for Office St		2.0000	Each	1,000.00000	2,000.00
Total Amount:						2,000.00 USD

Select All / Deselect All

3. Review and Submit

STEP#1: All requesters have a set of default chartfields (CUNYfirst codes that identify the transactions in the system) when they were initially setup in CUNYfirst. Example of chartfields are GL Unit, Account, Dept.#, Major Purpose Code, Budget Date and others. Default chartfields can be reviewed and changed for each line in the requisition. You can see all of them by clicking 'Chartfield1', 'Chartfield2', 'Chartfield3' and 'Details' tabs.

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: MEC55 MEC Other Non-Tax Levy
 Requester: 14211180 Gabrielle Keane-Dawes *Currency: USD
 Requisition Name: Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	FY19 - Computers for Office St		2.0000	Each	1,000.00000	2,000.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 2.0000
 Status: Active *Ship To: A1-L190
 Attention: Gabrielle Keane-Dawes

*Distribute by: Qty SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		C-113	2.0000	100.0000	2,000.00	MEC55	53912

STEP#2: Line items on a requisition can be created as "quantity based" for goods and materials and amount only for services or blanket purchase orders. This requisition is quantity based requisition.

By clicking on **Chartfields2** and **Chartfields3**, you can review/change the chartfields associated with this requisition. Each requester has a set of default chartfields that will automatically populate a requisition. These chartfields can be change during the creation of the requisition.

Accounting Lines

Chartfields1 | **Chartfields2** | Chartfields3 | Details | Asset Information

Oper Unit	Fund	Dept	Program	MP	Sp Init
9999	12	80233	99999	500	9999

Accounting Lines


Chartfields1 | Chartfields2 | **Chartfields3** | Details | Asset Information


PC Bus Unit	Project	Activity	Fnd Src	Proj Act	ChartField 3
			999999		

STEP#3: Requesters are required to add supporting information as an attachment. At minimum the following documents are required:

- Needs justification (What and why are you requesting this goods/services)
- Any vendor budgetary quote (details of good/services to be acquired and cost)
- Any additional supporting documentation.

Purchasing agents will use the attached support to document their due diligence and compliance process.

Click on the **callout**  icon to add supporting documentation.

Requisition Lines						
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	FY19 - Computers for Office St		2.0000	Each	1,000.00000	2,000.00 

STEP#4: Click **Add Attachment** icon to add attachment(s), browse to select the file(s). Use short and concise file naming convention. For example: Needs Justification; Budgetary Quote; etc. click Upload and finally **OK**.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	FY19 - Computers for	2.0000	Each	1,000.00000 USD

Quote for two Dell Computers

Send to Vendor Show at Receipt Show at Voucher

1 Add Attachment

OK Cancel

File Attachment

2 Browse... No file selected.

3 Upload Cancel

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	FY19 - Computers for	2.0000	Each	1,000.00000 USD


Quote for two Dell Computers

Send to Vendor Show at Receipt Show at Voucher

Attached File	View	Send to Vendor
1 Dell_Quote.pdf	View	<input type="checkbox"/>

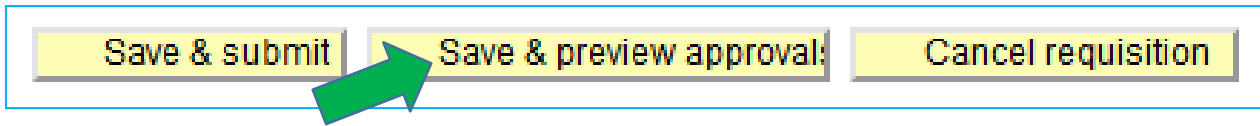
Add Attachment

4 OK Cancel

Price	Total
2,000.00 	

Callout is now filled. Indicating that comments and/or attachments exist.

STEP#5: Once the requisition is ready to be saved, click on **Save & preview approvals**. This will save the requisition by assigning a requisition ID and will illustrate the approval routing the requisition will follow.



STEP#6: Workflow routing will display. Click **Submit** to initialize the approval process.

Confirmation

Requested For:		Number of Lines:	1
Requisition Name:	FY19 - Computers	Total Amount:	2,000.00 USD
Requisition ID:	0000000202		
Business Unit:	MEC55		
Priority:	Medium		
Budget Status:	Not Checked		

Supervisor Approval

▼ **FY19 - Computers:Initiated** + Start New Path

Supervisor Approval

Not Routed

+ [Janis Grant](#) +

Supervisor by UserID

Dept/Category Approvals

▼ **Line 1:Initiated** + Start New Path

FY19 - Computers for Office Staff

Department Approval

Not Routed → Not Routed

+ [Multiple Approvers](#) + → [Multiple Approvers](#) +

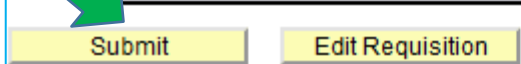
Department Manager Approval 1 → Department Manager Approval 2

Category Approver - IT

Not Routed

+ [Troy J. Hahn](#) +

Requisition IT Cat Approver



NOTE: Approvers will receive an email notification that a requisition is awaiting their approval. Once the requisition **has been fully approved by all parties** (supervisor, department approvers and in some cases category approvers), the requisition will then be available for the budget check process. Budget check process runs automatically at the top of every hour