

CUNYfirst

Requisition Creation

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.

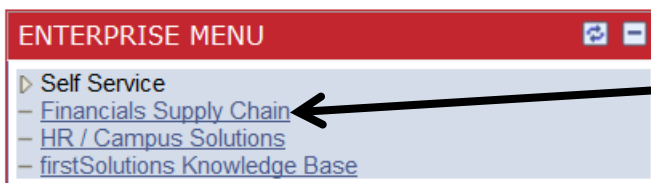
Please Note: THIS IS THE TRAINING ENVIRONMENT!!!

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.

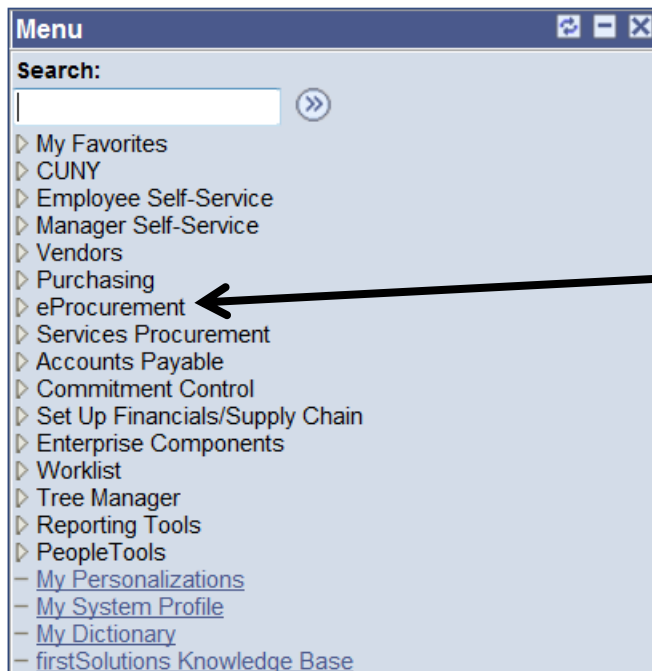
Username:

Password: 

Enter username and password to enter system



Click "**Financial Supply Chain**"



Click "**eProcurement**" to access the online requisitioning module



Click on **“Create Requisition”** to access online requisitioning

Create Requisition



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

Business Unit: Graduate Center Tax Levy- CUNY

Requester: Ronald Paynter ***Currency:**

Requisition Name: **Priority:**

Line Defaults

Enter Requisition Name for easier reference

Click Continue to enter requisition information

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**

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.

[Review and Submit](#)

Click **“Special Item”** or **Special Request** and then **Special Item**

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:

*Quantity:

*Category:

Vendor ID:

Vendor Item ID:

Mfg ID:

Mfg Item ID:

*Currency:

*Unit of Measure:

Due Date:

[Suggest New Vendor](#)

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

You will need to complete Item Description, Price, Quantity, Unit of Measure, Category and Vendor ID

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: Catering for Department Meeting 10/6/13

*Price: 104.00 *Currency: USD

*Quantity: 1 *Unit of Measure:

*Category: Due Date:

Vendor ID:

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

Description, price and quantity completed.

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: Catering for Department Meeting 10/6/13

*Price: 104.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure:

*Category: Due Date:

Vendor ID:

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

Click magnifying glass to select Unit of Measure

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: Catering for Department Meeting 10/6/13
*Price: 104.00000
*Quantity: 1.0000
*Category:
Vendor ID:
Vendor Item ID:
Mfg ID:
Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt

Look Up

Look Up Unit of Measure

Unit of Measure: begins with

 [Basic Lookup](#)

Search Results

View 100 First 1-115 of 115 Last

Unit of Measure	Description	Short Description
AVC	Average Cost Dollars	AvgCost
B15	BAG 15	BAG 15
B25	BAG 25	BAG 25
B50	BAG 50	BAG 50
BBL	Barrel - Liquid Measure	Barrel
BOX	Box	Box
BRL	BARREL	BARREL
BSD	Bushel - Dry Measure	Bushel

Look Up

Look Up Unit of Measure

Unit of Measure: contains

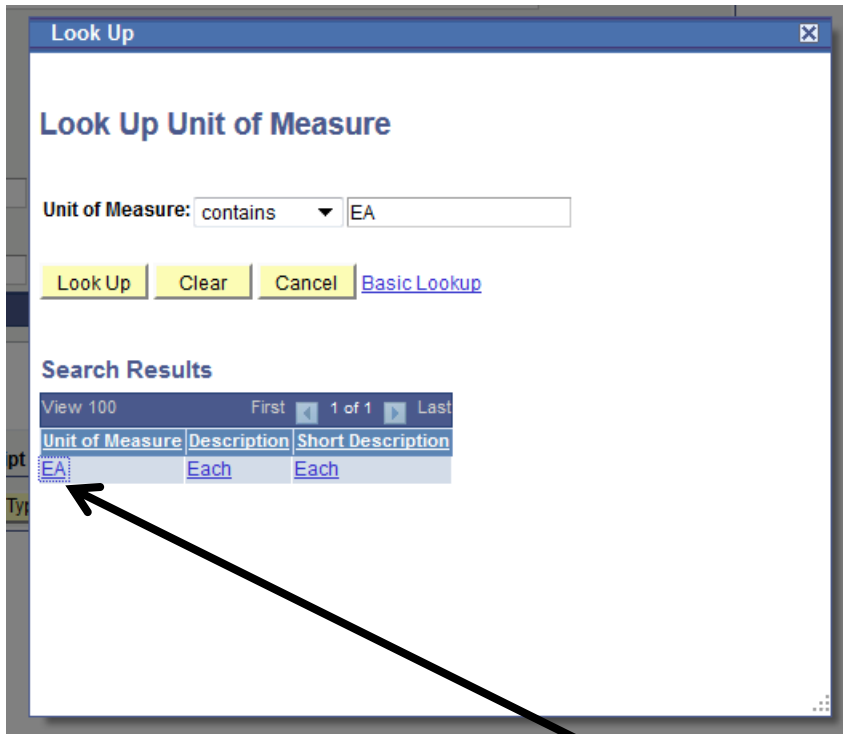
 [Basic Lookup](#)

Search Results

View 100 First 1-115 of 115 Last

Unit of Measure	Description	Short Description
AVC	Average Cost Dollars	AvgCost
B15	BAG 15	BAG 15
B25	BAG 25	BAG 25
B50	BAG 50	BAG 50
BBL	Barrel - Liquid Measure	Barrel
BOX	Box	Box
BRL	BARREL	BARREL
BSD	Bushel - Dry Measure	Bushel

Change drop down field to Contains and enter Unit of Measure click Look Up



Unit of Measure results appear. Click on Unit of Measure

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**

Special Item

*Item Description: Catering for Department Meeting 10/6/13

*Price: 104.00 *Currency: USD

*Quantity: 1 *Unit of Measure: EA

*Category: Due Date: Suggest New Vendor

Vendor ID:

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Add Item Cancel Add or Start New Type

Request New Item

Request New Item

Unit of Measure is populated

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: Catering for Department Meeting 10/6/13

*Price: 104.00 *Currency: USD

*Quantity: 1 *Unit of Measure: EA

*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

Click magnifying glass to select **Category**

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ Search Categories

Search By Category

Categories Customize | Find | | First 1 of 1 Last

Catalog	Category	Description	Find in Tree
1			

► Browse Category Tree

Change Category to **DESCRIPTION** and the enter **description** of goods/service click **FIND**

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ Search Categories

Search By Description

Categories Customize | Find | | First 1 of 1 Last

Catalog	Category	Description	Find in Tree
1			

► Browse Category Tree

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Description | Cater | Find

Categories	Customize	Find	First	1 of 1	Last
Catalog	Category	Description	Find in Tree		
1 ALL ITEMS	901000000	Restaurants & catering			

Browse Category Tree

Return

The data description with “Catering” appear. Click on “Category Number” to populate description on requisition.

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**

Special Item

*Item Description: Catering for Department Meeting 10/6/13

*Price: 104.00000 | *Currency: USD

*Quantity: 1.0000 | *Unit of Measure: EA

*Category: 901000000 | 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

Add Item | Cancel | Add or Start New Type

Category field will be populated

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: Catering for Department Meeting 10/6/13

*Price: 104.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 9010000000 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

Click magnifying glass in Vendor field to select vendor

Vendor Search

Vendor ID:

Name:

Short Vendor Name: [Suggest New Vendor](#)

City:

Country: State:

Postal Code:

Enter search criteria to find a vendor.

[Return to Special Request](#)

Enter Vendor name in **Short Vendor Name** field (you only need to enter the first few letters of a vendor name. The full name is not necessary and may not be in the system with the same spelling as you may expect)

Vendor Search

Vendor ID

Name

Short Vendor Name:

City

Country State

Postal Code

[Find](#) [Reset](#) [Suggest New Vendor](#)

Enter search criteria to find a vendor.

To look up a vendor such as Restaurant Associates you can type Restau and then click **“FIND”**

Vendor Search

Vendor ID

Name

Short Vendor Name:

City

Country State

Postal Code

[Find](#) [Reset](#) [Suggest New Vendor](#)

	Vendor ID	Name	Location	Address	City	State	
1	2000003026	RESTAURANT ASSOCIATES INC	MAINCHECK	365 5TH AVE	NEW YORK	NY	
2	2000003026	RESTAURANT ASSOCIATES INC	OSCOFSET02	110 STATE ST MAILDROP 10-4	ALBANY	NY	
3	2000003966	COR RESTAURANT LLC	MAINCHECK	4 WEST 31ST ST	NEW YORK	NY	

[Return to Special Request](#)

Select Vendor by clicking on **Vendor ID Number** of correct vendor

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: Catering for Department Meeting 10/6/13

*Price: 104.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 9010000000 Due Date:

Vendor ID: 2000003026 RESTAURANT ASSOCIATES INC [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

Vendor field is populated

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: Catering for Department Meeting 10/6/13

*Price: 104.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 9010000000 Due Date:

Vendor ID: 2000003026 RESTAURANT ASSOCIATES INC [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

Click "Add Item" to add this request to requisition.

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: Catering for Department Meeting 10/6/13

*Price: 104.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 9010000000 Due Date:

Vendor ID: 2000003026 RESTAURANT ASSOCIATES INC [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

You can now add additional items if desired follow steps above for multiple items

Click "Review and Submit" when you have completed all requests for this requisition.

Menu

- eProcurement
 - Buyer Center
 - Create Requisition**
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Requisition Approval
 - Services Procurement
 - Accounts Payable
 - Commitment Control

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: Catering for Department Meeting 10/6/13

*Price: 104.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 9010000000 Due Date:

Vendor ID: 2000003026 RESTAURANT ASSOCIATES INC [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

Requisition Summary

Description	Qty	UOM
Catering for Department Me...	1	EA

Total Lines: 1
Total Amount (USD): 104.00

Requisition Summary appears on left side of screen

To add an attachment or comment to your requisition

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: GRDPR Graduate Center - CUNY
Requester: 10850090 Ronald Paynter *Currency: USD
Requisition Name: Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Cartering for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00
Total Amount:						104.00 USD

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 **Bubble** to add comments or and attachments.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Cartering for Depart	1.0000	Each	104.00000 USD

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK Cancel

If you have an **Attachment** such as a quote click here. Add **Comments** in this field.

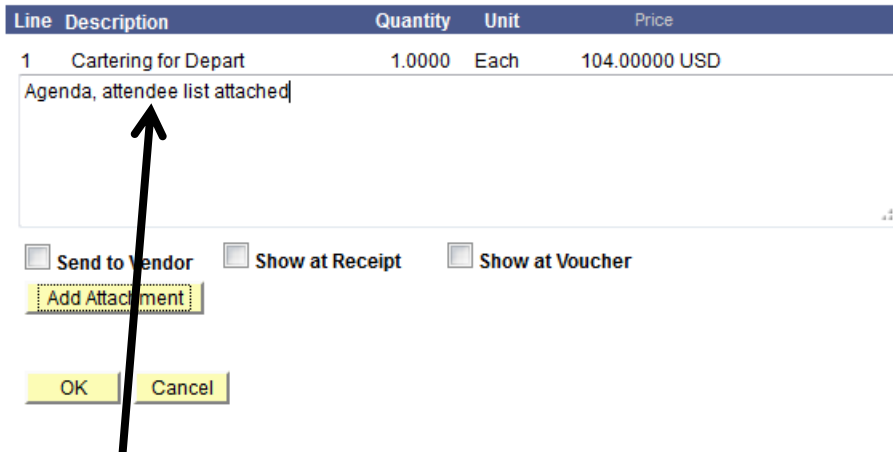
Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Cartering for Depart	1.0000	Each	104.00000 USD

Agenda, attendee list attached

Send to Vendor Show at Receipt Show at Voucher



Sample comment

Create Requisition

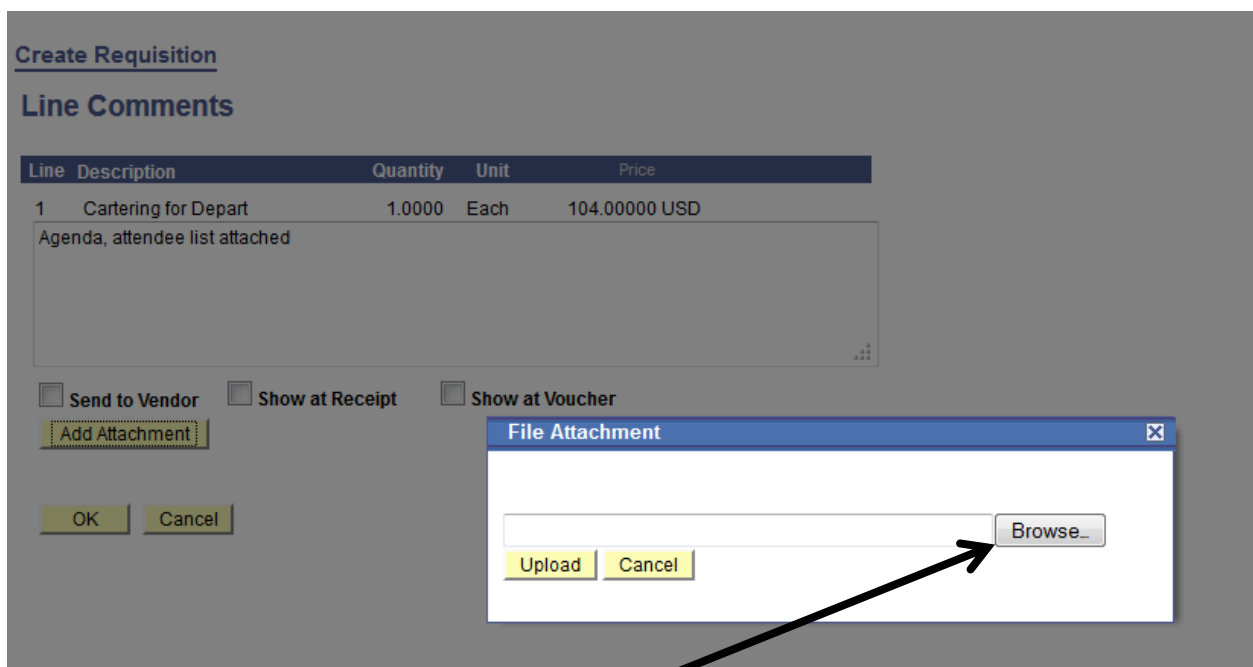
Line Comments

Line	Description	Quantity	Unit	Price
1	Cartering for Depart	1.0000	Each	104.00000 USD

Agenda, attendee list attached

Send to Vendor Show at Receipt Show at Voucher

File Attachment



When adding an attachment this option will appear so you can select a file to upload from your computer or scan folder. Click **Browse** to access folder where file is located.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Cartering for Depart	1.0000	Each	104.00000 USD

Agenda, attendee list attached

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK Cancel

File Attachment

C:\Users\rpaynter\Desktop\SKMBT_C3531310011602 **Browse...**

Upload **Cancel**

Select file from the computer folder where file is saved and click open to attach, then click **Upload**.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Cartering for Depart	1.0000	Each	104.00000 USD

Agenda, attendee list attached

Send to Vendor Show at Receipt Show at Voucher

Attached File	View	Send to Vendor
1 SKMBT_C35313100116020.pdf	View	<input type="checkbox"/>

Add Attachment

OK Cancel

Selected file will be attached and appear as indicated. If you have additional attachments follow the same procedure again. Once you have attached all documentation click **OK**.

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

Business Unit: GRDPR Graduate Center - CUNY
Requester: 10850090 Ronald Paynter *Currency: USD
Requisition Name: Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Catering for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00
Total Amount:						104.00 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

[Find more items](#)

Bubble will now have dotted lines to indicate there is an attachment or comments.

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

Business Unit: GRDPR Graduate Center - CUNY
Requester: 10850090 Ronald Paynter *Currency: USD
Requisition Name: Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Catering for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00
Total Amount:						104.00 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

[Find more items](#)

Review line details, click triangle next to line

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

Business Unit: GRDPR Graduate Center - CUNY
Requester: 10850090 Ronald Paynter ***Currency:** USD
Requisition Name: Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Cartering for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000
Status: Active *Ship To: GC-1211 [Modify Shipping Address](#)
Attention: Ronald Paynter

*Distribute by: Qty SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		GC-8105	1.0000	100.0000	104.00	GRD01	52805

Total Amount: 104.00 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

[Find more items](#)

Verify Chartfield information by clicking on Tabs

Chartfield1 info has delivery location, quantity and account that can be changed

Percent relates to percentage of expense for requisition and for each line of req.

GL Unit is constant for the Graduate Center which is GRD01

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

Business Unit: Graduate Center - CUNY
Requester: Ronald Paynter *Currency:
Requisition Name: Priority:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Caterling for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000
Status: Active *Ship To: GC-1211 [Modify Shipping Address](#)
Attention: Ronald Paynter

*Distribute by: Qty SpeedChart:

Accounting Lines

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

Total Amount: 104.00 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](#)

Chartfield2 has expense information. All fields are automatically populated based on system setup information. The only change may be in the “Dept” if you have rights to create a requisition for more than one department.

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

Business Unit: Graduate Center - CUNY
Requester: Ronald Paynter *Currency:
Requisition Name: Priority:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Caterling for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000
Status: Active *Ship To: GC-1211 [Modify Shipping Address](#)
Attention: Ronald Paynter

*Distribute by: Qty SpeedChart:

Accounting Lines

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

Total Amount: 104.00 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](#)

Chartfield3 does not require any changes by requestor.

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

Business Unit: GRDPR Graduate Center - CUNY
Requester: 10850090 Ronald Paynter *Currency: USD
Requisition Name: Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Cartering for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000
Status: Active *Ship To: GC-1211
Attention: Ronald Paynter
*Distribute by: Qty SpeedChart:

Accounting Lines

Affiliate	IN Unit	Budget Date	Stat	Open Qty	GL Base Amount	Currency
		10/08/20		1.0000	104.00	Dollar

Total Amount: 104.00 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget

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

Details is also an informational tab not requiring changes

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

Business Unit: GRDPR Graduate Center - CUNY
Requester: 10850090 Ronald Paynter *Currency: USD
Requisition Name: Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Cartering for Department Meeti	RESTAURANT ASSOCIATES INC	1.0000	Each	104.00000	104.00

Select All / Deselect All Total Amount: 104.00 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget

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

When the requisition is completed click "Save & Submit" To review a requisition first click "Save & Preview Approvals"

You must click "Save & Submit" before the requisition can be processed for approval