

## CUNYFirst

### How to Create a Requisition

Sign into CUNYFirst with **CUNYFirst ID** and **Password**

Click: Financial Supply Chain (In menu on left hand size of screen)

#### 1. Define Requisition


**eProcurement** (In menu on the left side)


##### **Create Requisition**

**Business Unit:** Should be **BCCPR** - click **OK**

Create requisition screen will appear

Optional: Go to **Requisition Name Box** and give your requisition a name (vendor, item ordered, event, etc.)

Click: **Delta**  on line defaults and requisition screen will drop down

Click: **Magnifying Glass**  to populate the following boxes **ONLY**

**Vendor, Category, UOM (Unit of Measure)**

Click: **Continue** (at bottom of page)

#### 2. Add Items and Services

Click: **Special Request and Special Item** tab (Special request screen will open up)

Complete: Item description by entering a full description of the commodity or services to be purchased. Include all pertinent information such as size, color, make, model, item and manufacturer's number.

Enter: **Price, Quantity**

The **Vendor, Category** and **UOM** will already be populated with the vendor, category and UOM you choose in step 1.

DO NOT enter information into the **Vendor Item ID**, **Manufacturer's ID**, and **Manufacturer's Item ID**.

### Additional Information Box

If the description of the item you are ordering does not fit in the item description section, you may add any additional information you feel is important in the **Additional Information** box. If you add additional description information click the **Send to Vendor**, **Show at Receipt** and **Voucher** boxes, so that this information will be included on the purchase order. You may also use this section to enter the name, address, telephone and fax number of a vendor who may not be listed in the CUNYFirst vendor database.

Click: **Add Item** and check **Requisition Summary** box on left hand side of the screen to make sure the description of the item, quantity, **UOM** along with the line number and cost appears in the box.

Clicking "Add Item" will also clear the requisition screen so that you can enter your next item by following the steps above. If you do not have any other items to add to the requisition you may proceed to the "**Review and Submit**" section by moving your cursor up to this section and click.

### **3. Review and Submit**

At this step you may:

#### **Review Your Requisition**

Attach documentation by: Scanning your document(s) and save them in a location on your computer

Click: On the cloud (on right hand side) at the end of the line item. You will be taken to a line comment page. Proceed to the yellow bar at the bottom that reads "**Add Attachment**".

Click: **Add Attachment, Browse, Upload**

Your document(s) will be attached to that line on your requisition. To view the document you may:

Click: **View** and follow the directions that appear on your screen

Click: **OK** to return to **Review and Submit**

To submit the requisition for approval by your supervisor:

Click: **Save and Submit**

To save the requisition and view approvals

Click: **Save and Preview** (Your requisition will not be submitted for approval by your Supervisor until you click Save and Submit.

To cancel requisition:

Click: **Cancel**