

# CUNYFIRST REQUISITIONS/PURCHASING PRESENTATION

**SAAA**  
STUDENT ACTIVITIES  
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AN AFFILIATE OF JOHN JAY COLLEGE

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**JOHN  
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OF  
CRIMINAL  
JUSTICE

# TABLE OF CONTENTS

1. WHAT IS PURCHASING?/ WHO HANDLES PURCHASING? (SLIDE 3)
2. GLOSSARY TERMS (SLIDE 4)
3. PROCUREMENT STEPS (SLIDE 5)
4. CREATING A REQUISITION ON CUNYFIRST(SIDES 6-8)
5. THREE STAGES IN CREATION OF REQUISITIONS (SLIDES 9-20)
  - STAGE 1: DEFINE REQUISITION (SLIDES 10)
  - STAGE 2 : ADD ITEMS AND SERVICES (SLIDES 11-13)
  - STAGE 3 : REVIEWING AND SUBMITTING (SLIDES 14-19)
6. MANAGE REQUISITIONS (SLIDE 20)
7. BUDGET CHECK(SLIDE 21)
8. HOW TO CANCEL A REQUISITION(SLIDE 22-24)
9. PURCHASE ORDER (SLIDES 25)

## WHAT IS PURCHASING?

- PURCHASING IS THE PROCESS OF HOW GOODS AND SERVICES ARE ORDERED.
- PURCHASING CAN BE USUALLY DESCRIBED AS THE TRANSACTIONAL FUNCTION OF PROCUREMENT FOR GOODS AND SERVICES.

## WHO HANDLES PURCHASING?

- PURCHASING WILL BE DONE SOLELY BY THE STUDENT ACTIVITIES ASSOCIATION, INC. BUSINESS OFFICE (SAABO) & JJC PROCUREMENT DEPARTMENT.
- GENERALLY, STUDENT ORGANIZATIONS AND DEPARTMENTS MUST SUBMIT PURCHASE REQUESTS AKA REQUISITIONS VIA CUNYFIRST AT LEAST THIRTY (30) DAYS PRIOR TO THE EXPECTED DATE OF GOODS AND SERVICES. SOME REQUESTS MAY REQUIRE ADDITIONAL TIME.

**ANY PURCHASES OR PROMISES MADE TO VENDORS BY ORGANIZATIONS AND/OR DEPARTMENTS WITHOUT THE APPROVAL OF THE STUDENT ACTIVITIES ASSOCIATION, INC. BUSINESS OFFICE WILL BE AT THE EXPENSE OF THAT ENTITY.**

# GLOSSARY TERMS

- REQUISITION : ONLINE FORM OF REQUESTING ITEMS/SERVICES. AFTER YOU ENTER & SUBMIT A REQUISITION, YOU CAN ROUTE IT FOR APPROVAL. FOR ALL INTENTS AND PURPOSES, A REQUISITION IS WHAT WE WILL NOW CALL PURCHASE REQUEST.
  - INSPECTION : EXAMINATION OF CERTAIN PURCHASES
- PURCHASE ORDER : USED BY A BUYER TO PLACE AN ORDER AND IS ISSUED BEFORE DELIVERY.
  - RECIPT: PROOF THAT GOODS/SERVICES WERE RECEIVED
- VOUCHER: A DOCUMENT USED TO GATHER AND FILE ALL OF THE SUPPORTING DOCUMENTS NEEDED TO APPROVE THE PAYMENT OF A LIABILITY.
  - QUERY: A REQUEST FOR DATA OR INFO.
- CHARTFIELD: THE CHART OF ACCOUNTS IS COMPROMISED OF INFO FIELDS THAT PROVIDE BASIC STRUCTURE TO SEGREGATE AND CATEGORIZE TRANSACTIONAL AND BUDGET DATA. EACH INFORMATIONAL FIELD IS CALLED A CHARTFIELD.



# PROCUREMENT STEPS

1

- **VENDOR ID CHECK** Entities need to confirm their vendor of choice has a Vendor ID in CUNYFirst. If vendor is not in CUNYFirst, entities need to email [saabo@jjay.cuny.edu](mailto:saabo@jjay.cuny.edu) with vendor's CUNY Substitute W-9 Form, CUNY Vendor/Payee Direct Deposit (ePayment) Request Form, and Document Verification Memorandum to be submitted to the CUNY Vendor Management Unit for vetting and approval.

2

- **EMAIL SUPPORTING DOCUMENTS** Entities need to email [saabofoms@jjay.cuny.edu](mailto:saabofoms@jjay.cuny.edu) with a document packet for all requests (forms will depend on type of request, ex: oral bid, contract request, etc.)

3

- **REQUISITION/BUDGET CHECK** Once supporting documents have been reviewed and approved, the entity will be notified to enter a requisition on CUNYFirst. Requisition must be entered and approved prior to a budget check under Manage Requisitions.

4

- **PROCUREMENT** Purchasing reviews the requisition, determines & follows the appropriate procurement method, then issues a purchase order directly to the vendor. If a contract is required, the vendor must sign the contract *before* a purchase order can be issued.

5

- **RECEIPT OF GOODS/SERVICES** Selected vendor provides the goods/services. The requestor inspects goods for any material defects. If the goods/services are accepted, the requestor must create a receipt in CUNYfirst to initiate payment to the vendor.

6

- **SUBMIT INVOICE FOR PAYMENT** The vendor is required to submit an invoice to Accounts Payable (A/P). The requestor must approve the invoice in order for payment to be made by A/P. Invoices received directly from the vendor should be forwarded to [saabo@jjay.cuny.edu](mailto:saabo@jjay.cuny.edu) for processing.

7

- **PAYMENT** A/P validates payment requests & creates payment vouchers. Vouchers are interfaced to the State Financial System (SFS) for payment to the vendor.

# CREATING A REQUISITION ON CUNYFIRST

CUNY ACQUIRES GOODS AND SERVICES THROUGH A COMPETITIVE BIDDING PROCESS MANAGED BY THE PURCHASING DEPARTMENT.

STUDENT ORGANIZATIONS/DEPARTMENTS ARE REQUIRED TO CREATE A REQUISITION STATING THEIR BUSINESS NEEDS.

IT IS STRONGLY SUGGESTED THAT REQUESTERS RUN THE BUDGET OVERVIEW QUERY IN CUNYFIRST TO CONFIRM THE GENERAL AVAILABILITY OF FUNDS **PRIOR** TO CREATING A REQUISITION.

IF THE FUNDS ARE INSUFFICIENT, REQUISITIONS WILL FAIL THE BUDGET CHECKING PROCESS AND WILL NOT ROUTE TO THE PURCHASING DEPARTMENT.

PERSONALIZE CONTENT LAYOUT

CUNYFIRST MENU

- [Campus Solutions](#)
- [Financials Supply Chain](#) ✓
- [Human Capital Management](#)
- [Student Center](#)
- [CUNY Alert Preferences](#)
- [CUNY Alert Subscription](#)
- [NYS Voter Registration](#)
- [NYS Voter Registration Form](#)
- [My Personalizations](#)
- [CUNY IT Help](#)

SIGN INTO YOUR CUNY FIRST ACCOUNT AND FROM THE ENTERPRISE MENU, SELECT THE **Financial Supply Chain** LINK.

NAVIGATE TO : **eProcurement > Create Requisition.**

CUNYfirst Fully Integrated Resources & Services Tool

Favorites Main Menu

Menu

Search:

- ▷ My Favorites
- ▷ CUNY
- ▷ Employee Self-Service
- ▷ Supplier Contracts
- ▷ Vendors
- ▷ Purchasing
- ▷ eProcurement
- ▷ Accounts Payable
- ▷ Commitment Control
- ▷ Set Up Financials/Supply Chain
- ▷ Enterprise Components
- ▷ Worklist
- ▷ Tree Manager
- ▷ Reporting Tools
- ▷ PeopleTools
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

Menu

- ▼ eProcurement
  - ▶ Buyer Center
    - Create Requisition
    - [Manage Requisitions](#)
    - [Approve Requisitions](#)
    - [Receive Items](#)
    - [Procurement Card Center](#)
    - [Reports](#)
    - [Administer Procurement](#)
    - [My Profile](#)
    - [Requisition Approval](#)

## Create Requisition

---

### Specify Business Unit

\*Business Unit:

JJCo3



Other Non-Tax Levy

OK

WHEN PROMPTED, ENTER BUSINESS UNIT, **JJC03** AND THEN CLICK ON **Ok**.



# THREE STAGES IN THE CREATION OF A REQUISITION



**STAGE 1:  
DEFINE REQUISITION**



**STAGE 2:  
ADD ITEMS AND SERVICES**



**STAGE 3:  
REVIEWING AND SUBMITTING**



# DEFINE YOUR REQUISITION

NAME YOUR REQUISITION. THIS IS INTENDED TO MAKE IT EASIER TO SEARCH FOR AND KEEP TRACK OF, AS THERE WILL BE MULTIPLE REQUISITIONS THROUGHOUT THE YEAR.

THE EXAMPLE SHOWCASES A REQUISITION FOR COMPUTERS THAT THIS DEPARTMENT PLANS TO PURCHASE FOR FISCAL YEAR 2019.

ONCE NAMED, CLICK ON ***Continue.***

**CUNYfirst**  
Fully Integrated Resources & Services Tool

Menu

- CUNY
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Vendors
- Purchasing
- eProcurement
  - Buyer Center
    - Create Requisition**
    - Manage Requisitions
    - Approve Requisitions
    - Receive Items
    - Reports

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

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

Business Unit: JJC03 MEC Other Non-Tax Levy

Requester: 14211180 Gabrielle Keane-Dawes \*Currency: USD

Requisition Name: FY19 - Computers Priority: Medium

Continue



# ADD ITEMS AND SERVICES

ON THE **SPECIAL REQUEST** TAB THERE ARE FOUR REQUEST TYPES; SELECT THE TYPE THAT FITS YOUR INDIVIDUAL REQUEST.

**CUNYfirst**  
Fully Integrated Resources & Services Tool

Menu

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

### 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**

#### Select a Request Type

<a href="#">Special Item</a>	Request an item that is not listed in the Catalog.
<a href="#">Fixed Cost Service</a>	Request a one-time service for a flat fee.
<a href="#">Variable Cost Service</a>	Request a service for which the fee is based on the time worked.
<a href="#">Time and Materials</a>	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

**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

**SPECIAL ITEM:** USE THIS IF YOU ARE ORDERING ANY PRODUCTS (PROMOTIONAL ITEMS, SUPPLIES, ETC.)

**FIXED COST SERVICE:** USE THIS IF YOU ARE PAYING A VENDOR FOR A SERVICE (CONTRACTUAL) .

**VARIABLE COST SERVICE:** USE THIS IF YOU ARE PAYING A VENDOR FOR MULTIPLE SERVICES (EX: 3 WORKSHOPS).

**TIME AND MATERIALS:** USE THIS IF YOU ARE PAYING A VENDOR FOR A SERVICE AND PRODUCT (EX: BOOK TALK & BOOKS).

ENTER ALL THE REQUIRED INFO INCLUDING ITEM DESCRIPTION, PRICE, QUANTITY, CATEGORY CODE, UNIT OF MEASURE, VENDOR ID, AND ADDITIONAL INFORMATION ABOUT THE PURCHASE AND/ OR CONTACT INFORMATION OF REPRESENTATIVE .

SELECT “**send to vendor**”, “**show at receipt**” AND “**show at voucher**” BEFORE ADDING ITEM.

AFTER ALL INFORMATION IS ENTERED, CLICK ON **Add Item**.



**CUNYfirst**  
Fully Integrated Resources & Services Tool

**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:  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

Add Item | Cancel | Add or Start New Type

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**.



REQUISITION

**CUNYfirst**  
Fully Integrated Resources & Services Tool

**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

**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

**Requisition Summary**

Description	Qty	UOM
FY19 - Computers for Offic...	2	EA

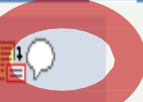
Total Lines: 1  
Total Amount (USD): 2,000.00



# REVIEW AND SUBMIT

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	

CLICK **Add Attachment** ICON TO ADD ATTACHMENT(S), BROWSE TO SELECT THE FILE(S). MAKE SURE YOUR FILE NAME IS SHORT AND CONCISE.

ATTACH **PDF** OF PAPERWORK SUBMITTED TO [SAABOFORMS@JJAY.CUNY.EDU](mailto:SAABOFORMS@JJAY.CUNY.EDU)

CLICK UPLOAD AND SELECT OK.

**1** Add Attachment

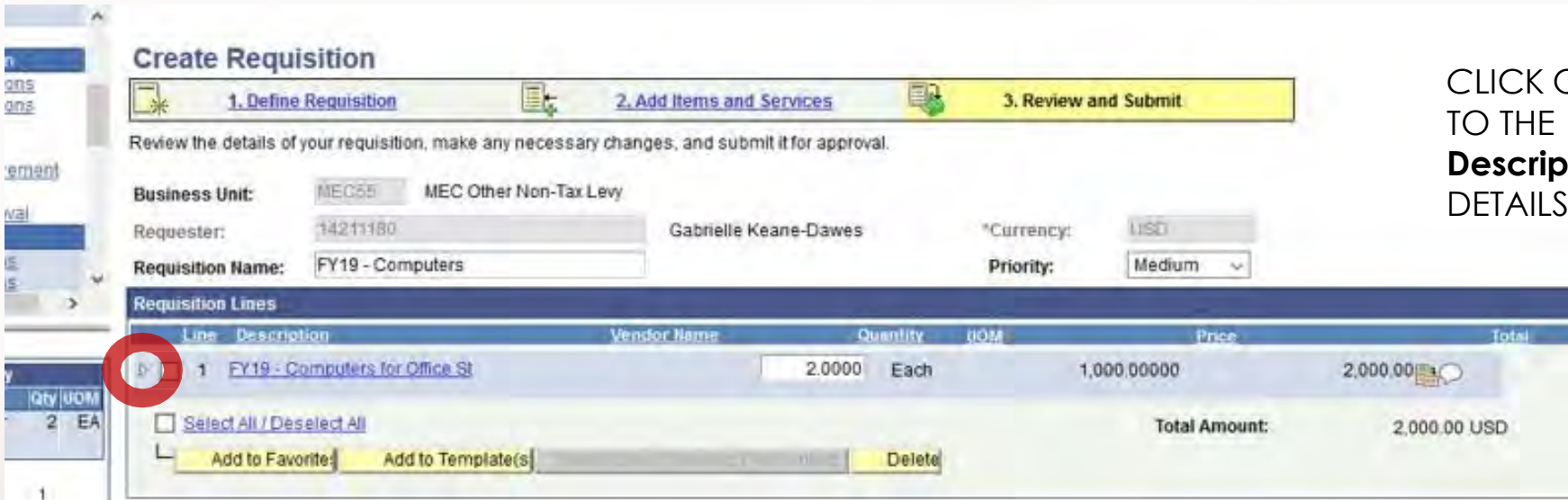
**2** File Attachment dialog: Browse... No file selected. Upload Cancel

**3** Upload

**4** Attached File table:

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

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



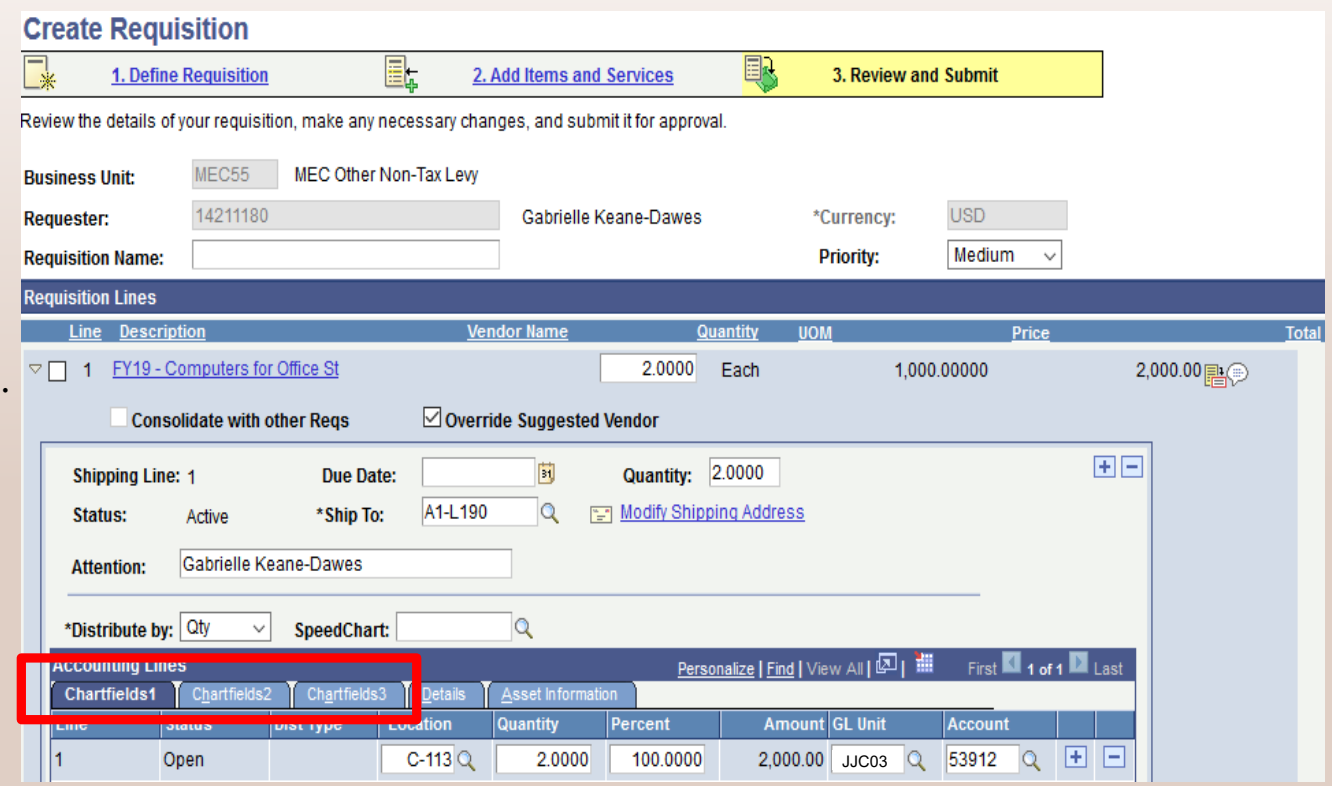
CLICK ON THE TRIANGLE (▶) TO THE LEFT OF THE **Line Description** TO SEE MORE DETAILS.



FILL IN THE REQUIRED CHARTFIELDS: **Account, OPER UNIT, Dept.#, MOP, SPI UNIT, PROGRAM, AND FUNDING SOURCE.** DEFAULT **Charfields** CAN BE VIEWED AND CHANGED FOR EACH LINE IN THE REQUISITION.

ALL REQUESTERS HAVE A SET OF DEFAULT CHARTFIELDS (CUNYFIRST CODES THAT IDENTIFY THE TRANSACTIONS IN THE SYSTEM) WHEN THEY ARE INITIALLY SETUP IN CUNYFIRST.

YOU CAN SEE ALL OF THEM BY CLICKING '**Charfield1**', '**Charfield2**', '**Charfield3**' AND '**Details**' TABS.





MORE CHARTFIELD BOXES CAN BE FOUND ON TABS: **Chartfields2** AND **Chartfields3**.

Accounting Lines								Personalize   Find   View All   [Print]   [Grid]   First 1 of 1 Last	
Chartfields1	Chartfields2	Chartfields3	Details	Asset Information					
Oper Unit	Fund	Dept	Program	MP	Sp Init				
9999	12	75054	99999	300	9999			+	-

Accounting Lines								Personalize   Find   View All   [Print]   [Grid]   First 1 of 1 Last	
Chartfields1	Chartfields2	Chartfields3	Details	Asset Information					
PC Bus Unit	Project	Activity	Fnd Src	Proj Act	Chartfield 3				
			999999					+	-

**\* PROGRAM AND FUNDING SOURCE CODES DIFFER AMONG EACH ENTITY. EMAIL [SAABO@JJAY.CUNY.EDU](mailto:SAABO@JJAY.CUNY.EDU) TO CONFIRM YOUR CODES.**

# AMOUNT ONLY REQUISITION LINES



Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Copier maintenance services		1.0000	Each	3,577.00000	3,577.00

### Create Requisition

#### Line Details

Line: 1 [Copier maintenance services](#)

**REMEMBER:** Amount Only Lines on a requisition are for services only.  
E.g. telephone bills, maintenance services, Etc.

**Item Details**

Amount: 3,577.00 USD  
Category: 7215406600 Office Equipment Maintenance [View Hierarchy](#)

Buyer:  [Buyer Information](#)  
Vendor:  [Suggest New Vendor](#)  
Vendor Location:   
Vendor's Catalog:   
Vendor Item ID:   
Manufacturer ID:   
Manufacturer's Item ID:  UPN ID:

Physical Nature: Services  
Where Service Performed: Buyer's

RFQ Required  Zero Price Indicator  Amount Only  
 Device Tracking  Stockless Item  Inspection Required

[Configuration Info](#)

#### Contract

**Posting Controls**

OK Cancel

**3**

**Message**


The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)

The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

**4** Yes No

**Amount Only** LINES ON A REQUISITION ARE FOR SERVICES ONLY.

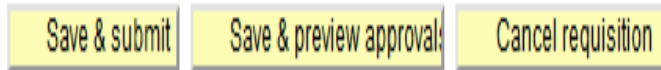
EXAMPLE: CONTRACTUAL SERVICES.

TO MAKE A LINE ON A REQUISITION ON **Amount Only** LINE, CLICK ON THE **Line Details** (  ) ICON, PLACE A CHECK MARK ON THE **Amount Only** CHECK BOX, CLICK **Ok** AND FINALLY CLICK ON **Yes**.



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.



CLICK **SUBMIT** TO INITIALIZE THE APPROVAL PROCESS

ONCE YOU'VE REACHED THIS PAGE, YOUR REQUISITION HAS BEEN SUBMITTED AND IS NOW IN THE PROCESS OF GETTING APPROVED.

ALL REQUISITION APPROVERS (**SUPERVISORS, DEPARTMENT APPROVERS, CATEGORY APPROVERS**) WILL RECEIVE AN EMAIL NOTIFICATION WITH A LINK TO APPROVE PENDING REQUISITIONS.

ONCE ALL REQUISITION DETAILS HAVE BEEN REVIEWED AND SUPPORTING DOCUMENTS VERIFIED, THE REQUISITION IS READY TO BE APPROVED.



**Confirmation**

Requested For:		Number of Lines:	1
Requisition Name:	FY19 - Computers	Total Amount:	2,000.00 USD
Requisition ID:	0000000202		
Business Unit:	JJC03		
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

[Multiple Approvers](#)

Department Manager Approval 1

Not Routed

[Multiple Approvers](#)

Department Manager Approval 2

Category Approver - IT

Not Routed

[Troy J. Hahn](#)

Requisition IT Cat Approver

**Submit** **Edit Requisition**



**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.



A FULLY APPROVED REQUISITION LOOKS LIKE THIS:

Favorites | Main Menu > eProcurement > Approve Requisitions > Requisition Approval

### Requisition Approval

**Confirmation**

✓ **FY19 - Computers has been approved.**

**Review/Edit Approvers**

#### Supervisor Approval

▼ **FY19 - Computers:Completed**

Supervisor Approval

**Approved**  
[Janis Grant](#)  
✓ Supervisor by UserID  
05/01/19 - 12:50 PM

#### Dept/Category Approvals

▼ **Line 1:Approved**  
FY19 - Computers for Office Staff

Department Approval

**Approved**  
[Jean Dufour](#)  
✓ Department Manager Approval 1  
05/01/19 - 1:06 PM

→ **Auto Approved**  
[Jean Dufour](#)  
✓ Department Manager Approval 2  
05/01/19 - 1:06 PM

Category Approver - IT

**Approved**  
[Troy J. Hahn](#)  
✓ Requisition IT Cat Approver  
05/01/19 - 1:06 PM



# MANAGING REQUISITIONS

MANAGE REQUISITIONS PAGE WILL ENABLE YOU TO VIEW REQUISITIONS & TRACK THEIR PROGRESS FROM CREATION TO PAYMENT.

STEP#1: NAVIGATE TO **eProcurement>Manage Requisitions**

STEP#2: ENTER AS MUCH INFO TO LOCATE THE REQUISITION TO BE VIEWED. FOR EXAMPLE, **Business Unit, 'date from' AND 'date to'** HAS BEEN ENTERED. CLICK Search.

ON THIS PAGE YOU CAN ALSO: CANCEL REQUISITION, COPY REQUISITION, EDIT REQUISITION, BUDGET CHECK REQUISITION, ETC...

**Manage Requisitions**

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: JJC03 Requisition Name:

Requisition ID:  Request Status: All but Complete Budget Status:

Date From: 04/30/2019 Date To: 05/07/2019

Requester: 14211180 Entered By:  PO ID:

Search Clear

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
000000202	FY19 - Computers	JJC03	05/01/2019	Received	Valid	2,000.00USD	<Select Action...> G

Requester: Gabrielle Keane-Dawes Entered By: Gabrielle Keane-Dawes Priority: Medium

Request Lifespan:

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

**Line Information**

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	FY19 - Computers for Office...	Received	1,000.00000	USD	2,000	EA	

IN THIS EXAMPLE: REQUISITION 000000202 HAS BEEN ROUTED TO THE PURCHASING DEPARTMENT WHERE A PURCHASE ORDER HAS BEEN CREATED & THE REQUESTOR HAS ADDED A RECEIPT.

REQUESTORS CAN TRACK ALL CHANGES TO THEIR REQUISITIONS FROM THIS PAGE INCLUDING APPROVALS, MANAGING BUDGET STATUS ERRORS, COPY AND CANCELLING REQUISITIONS.

# BUDGET CHECK

## Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:   
Requisition ID:  Request Status:  Budget Status:   
Date From:  Date To:   
Requester:  Entered By:  PO ID:

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.   
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
<a href="#">0000019989</a>	FY-21PlumbersSupplies	BMCPR	05/20/2021	Pending	Not Chk'd	956.38USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">0000019988</a>	FY-21ParkandSalesFireHo...	BMCPR	05/20/2021	Pending	Not Chk'd	300.00USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">0000019871</a>	Edge Brookdale Pulley	HTRPR	05/20/2021	Pending	Not Chk'd	141.76USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">0000019870</a>	F&F REF# 21-262 ACTUATO...	HTRPR	05/20/2021	Pending	Not Chk'd	53.50USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">0000018722</a>	Smart Catalog Watermark...	CSIPR	05/20/2021	Denied	Not Chk'd	9,975.28USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">0000018721</a>	FIRST TRANSIT DIS VAN	CSIPR	05/20/2021	Pending	Not Chk'd	5,573.22USD	<Select Action.. > <input type="button" value="Go"/>

AFTER YOUR REQUISITION HAS BEEN APPROVED NAVIGATE TO THE **MANAGE REQUISITION** PAGE. CLICK ON THE **"SELECT ACTION"** DROP BOX ON THE RIGHT OF YOUR REQUISITION NUMBER AND CLICK **"CHECK BUDGET"** FROM THE DROP DOWN, THEN CLICK GO.

## Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:   
Requisition ID:  Request Status:  Budget Status:   
Date From:  Date To:   
Requester:  Entered By:  PO ID:

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.   
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
<a href="#">000000275</a>	SS GRAD STUDIES SPEAK &...	JJC03	05/19/2021	PO(s) Created	Valid	1,000.00USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">000000268</a>	ISSC UNDOCUGRAD KEYNOTE...	JJC03	05/13/2021	Received	Valid	500.00USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">000000267</a>	ISSC UNDOCULAW S. SOUROUTI	JJC03	05/13/2021	Received	Valid	200.00USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">000000266</a>	GRAD STUDIES RESUME CON...	JJC03	05/13/2021	PO(s) Dispatched	Valid	2,000.00USD	<Select Action.. > <input type="button" value="Go"/>
<a href="#">000000263</a>	ADMISSIONS SIGNAL VINE	JJC03	05/11/2021	Received	Valid	19,788.00USD	<Select Action.. > <input type="button" value="Go"/>

BUDGET SHOULD HAVE VALID STATUS. IF YOU HAVE A BUDGET ERROR CONTACT SAABO@JJAY.CUNY.EDU



# HOW TO CANCEL A REQUISITION

IF GOODS OR SERVICES ARE NO LONGER REQUIRED AND A PO HAS NOT BEEN CREATED AGAINST THE REQUEST, THERE MAY BE TIMES WHEN A REQUISITION WILL NEED TO BE CANCELED.

WHEN A REQUISITION IS CANCELED, THE PRE-ENCUMBRANCE IS RELEASED ONCE THE CANCELED REQUISITION IS BUDGET CHECKED.

NAVIGATE TO **eProcurement>Manage Requisitions** AND SEARCH FOR THE REQUISITION. CLICK ON THE (  ) AND SELECT '**Cancel Requisition**' THEN CLICK ON THE (  ) BUTTON.

▷	<a href="#">0000000061</a>	0000000061	JJC03	04/05/2019	Approved	Valid	1,476.00USD	<Select Action...>  
▷	<a href="#">0000000060</a>	0000000060	JJC03	04/05/2019	Pending	Not Chk'd	4,140.00USD	<Select Action...> Cancel Requisition Copy Requisition Edit Requisition View Approvals
▷	<a href="#">0000000059</a>	0000000059	JJC03	04/05/2019	Open	Not Chk'd	306.00USD	
▷	<a href="#">0000000058</a>	0000000058	JJC03	04/04/2019	Pending	Not Chk'd	42.00USD	

CLICK ON THE '**Cancel Requisition**' BUTTON.

**Requisition Details for:**

Business Unit: BMC55      Date: 04/05/2019  
Requisition Name: 0000000061      Status: Approved  
Requisition ID: 0000000061      Total: 1,476.00

Line	Item Description	Status	Price	Qty	Total
1	<u>test</u>	Approved	123.00000 Each	12.0000	\$1476.00

[Return to Manage Requisitions](#)       **Cancel Requisition**


ONCE THE REQUISITION IS CANCELED, THE STATUS OF THE REQUISITION CHANGES TO '**Cancelled**'.

Reg ID	Requisition Name	BU	Date	Status	Budget	Total	
<a href="#">0000000061</a>	0000000061	BMC55 JJC03	04/05/2019	<b>Cancelled</b>	Not Chk'd	0.00USD	<Select Action... v G



REQUESTERS NEED TO DO A BUDGET CHECK TO ENSURE PRE-ENCUMBRANCE FUNDS RETURN BACK INTO THEIR BUDGET.

CLICK ON THE (  ) AND SELECT '**Check Budget**' THEN CLICK ON THE (  ) BUTTON.

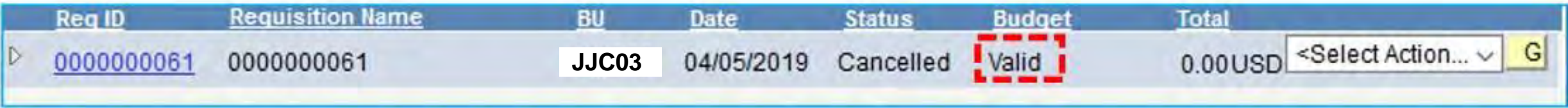


The screenshot shows a table with columns: Reg ID, Requisition Name, BU, Date, Status, Budget, and Total. The first row has Reg ID 0000000061, Requisition Name 0000000061, BU BMC55, Date 04/05/2019, Status Cancelled, Budget Not Chkd, and Total 0.00USD. A context menu is open over the 'Cancelled' status, showing options: <Select Action...>, <Select Action...>, Check Budget (highlighted), Copy Requisition, and Re-Open Requisition. Below the table are links: Create New Requisition, Inquire Change Request, Inquire Receipts, and Requisition R.

Reg ID	Requisition Name	BU	Date	Status	Budget	Total
0000000061	0000000061	BMC55	04/05/2019	Cancelled	Not Chkd	0.00USD

ONCE THE REQUISITION HAS BEEN BUDGET CHECKED, THE BUDGET STATUS OF THE REQUISITION CHANGES TO '**Valid**'.

THIS COMPLETES THE CANCEL PROCESS AND ENSURES FUNDS ARE RETURNED TO THE BUDGET FOR THE DEPARTMENT.



The screenshot shows the same table as above, but the BU is now JJC03 and the Status is Valid. The 'Valid' status is highlighted with a red dashed box. The context menu is still open over the 'Valid' status, showing the same options as before.

Reg ID	Requisition Name	BU	Date	Status	Budget	Total
0000000061	0000000061	JJC03	04/05/2019	Cancelled	Valid	0.00USD

# PURCHASE ORDER

## PURCHASE ORDER EXAMPLE

THE STUDENT ACTIVITIES ASSOCIATION, INC. BUSINESS OFFICE (SAABO) & JJC PROCUREMENT DEPARTMENT FINALIZES PURCHASE ORDERS AFTER A REQUISITION HAS BEEN APPROVED.

SAABO WILL INFORM THE ENTITY WHEN A PURCHASE ORDER HAS BEEN CREATED AND SENT TO THE VENDOR.

**NOTE:** THE REQUESTOR OR DEPARTMENT PERSONNEL MUST NOT PROVIDE THE VENDOR WITH THE PURCHASE ORDER NUMBER PRIOR TO THE RECEIPT OF A FULLY EXECUTED PURCHASE ORDER FROM THE STUDENT ACTIVITIES ASSOCIATION, INC. BUSINESS OFFICE (SAABO).



**John Jay Coll Student Assoc.**  
Student Activities Association, Inc.  
524 West 59th Street  
New York  
New York NY 10019  
United States

**Vendor:** 0000002073  
ULINE INC  
12575 ULINE Dr  
PLEASANT PRAIRIE WI 53158

### Purchase Order

Dispatch via Print

Purchase Order	Date	Revision	Page
JJC03-0000000002	09/10/2020		1
Payment Terms	Freight Terms	Ship Via	
Pay Now	Free On Board	-	
Buyer	Phone	Currency	
Hazel Stewart	212/237-8510	USD	

**Ship To:** NB-L2.65  
Central Receiving  
7:00AM to 12:00PM  
524 West 59th Street  
NEW YORK NY 10019  
United States

**Bill To:** John Jay College Student Activities Association, Inc.  
524 West 59th Street  
New York NY 10019  
United States

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1- 1	PUBLIC SAFETY VALIDATION STICKERS		7.00	EA	46.00	322.00	09/30/2020
<b>Schedule Total</b>						<u>322.00</u>	

<< Validation stickers 1/2"x1" as per quote #WB127189731-1 dated 06/29/20  
FACULTY: FALL 2020/SPRING 2021 (BOLD) - PACK OF 1000 =46.00  
STAFF: FALL 2020 (BOLD) - PACK OF 1000=46.00  
STAFF: SPRING 2021 (BOLD) - PACK OF 1000=46.00  
UNDERGRADUATE: FALL 2020 (BOLD) - PACK OF 1000=46.00  
GRADUATE: FALL 2020 (BOLD) - PACK OF 1000=46.00  
UNDERGRADUATE: SPRING 2021 (BOLD) - PACK OF 1000=46.00  
GRADUATE: SPRING 2021 (BOLD) - PACK OF 1000=46.00  
FREIGHT >>

Lisa Marie- Barbara Wala SAA Purchase