Creating a Non-Marketplace Requisition

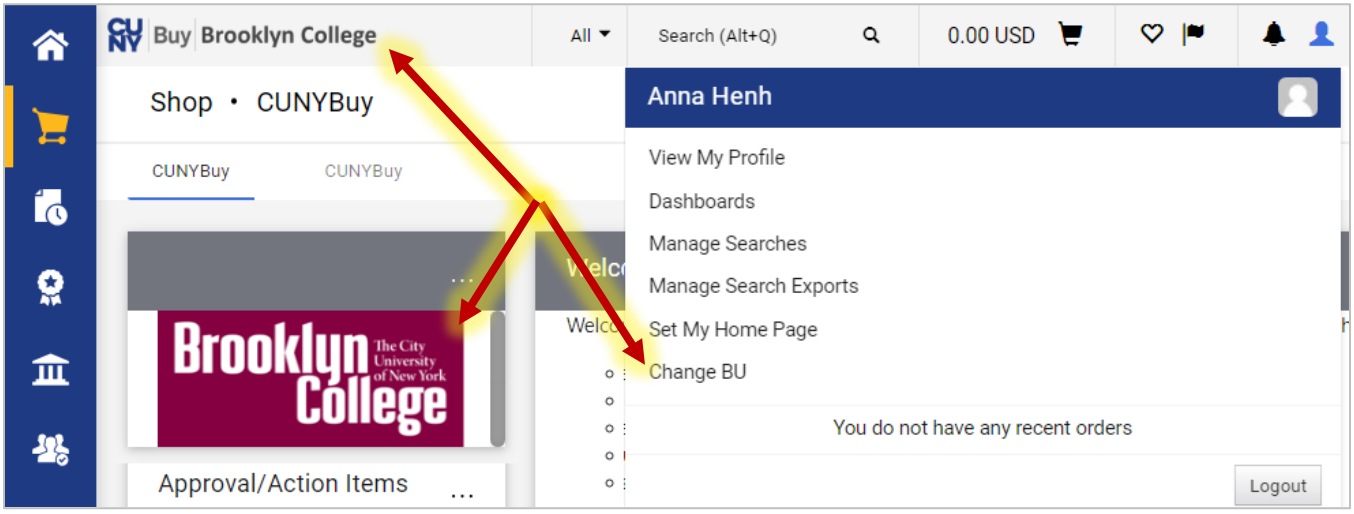
Requisitions are created in CUNYBuy by users who have the role of Creator. Creators can create requisitions for themselves, for other Creators, and for others in the Business Unit. Creators may create requisitions for any department within the Business Unit(s) for which they have the Creator role, and as determined by business unit practices.

Creators are responsible for complying with CUNY procurement policies and with any specific Business Unit practices.

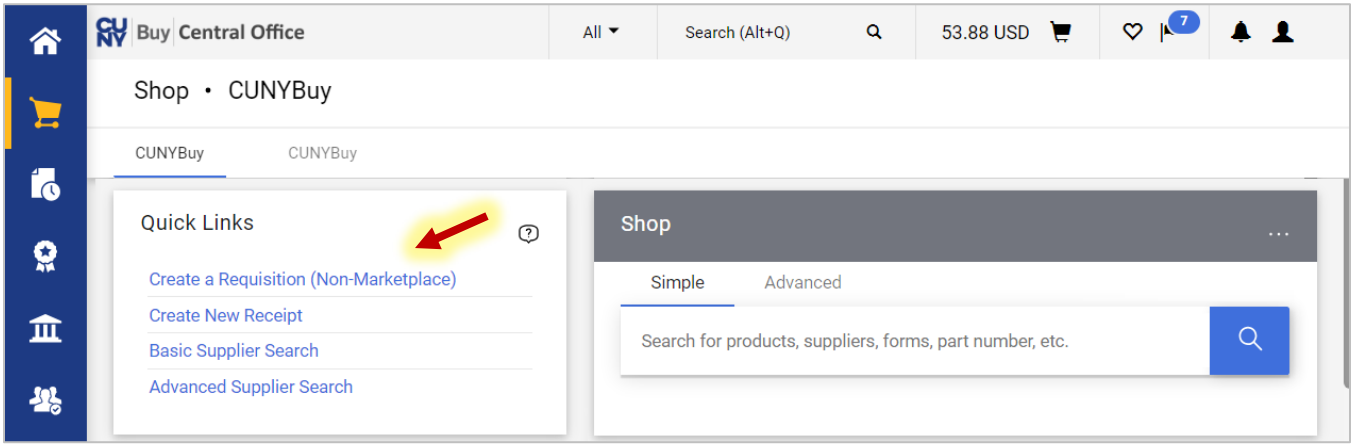
For goods or services that are not currently available on the Marketplace, creators can create a Non-Marketplace Requisition.

Once a Creator has logged onto CUNYBuy, the following must be verified:

- The homepage displays the correct Business Unit. If it does not, change the Business Unit to the correct one before proceeding with any other tasks. You can change your Business Unit by clicking **User** icon in the top right corner and selecting the
- Ensure that the Cart is empty and at “0.00 USD”.

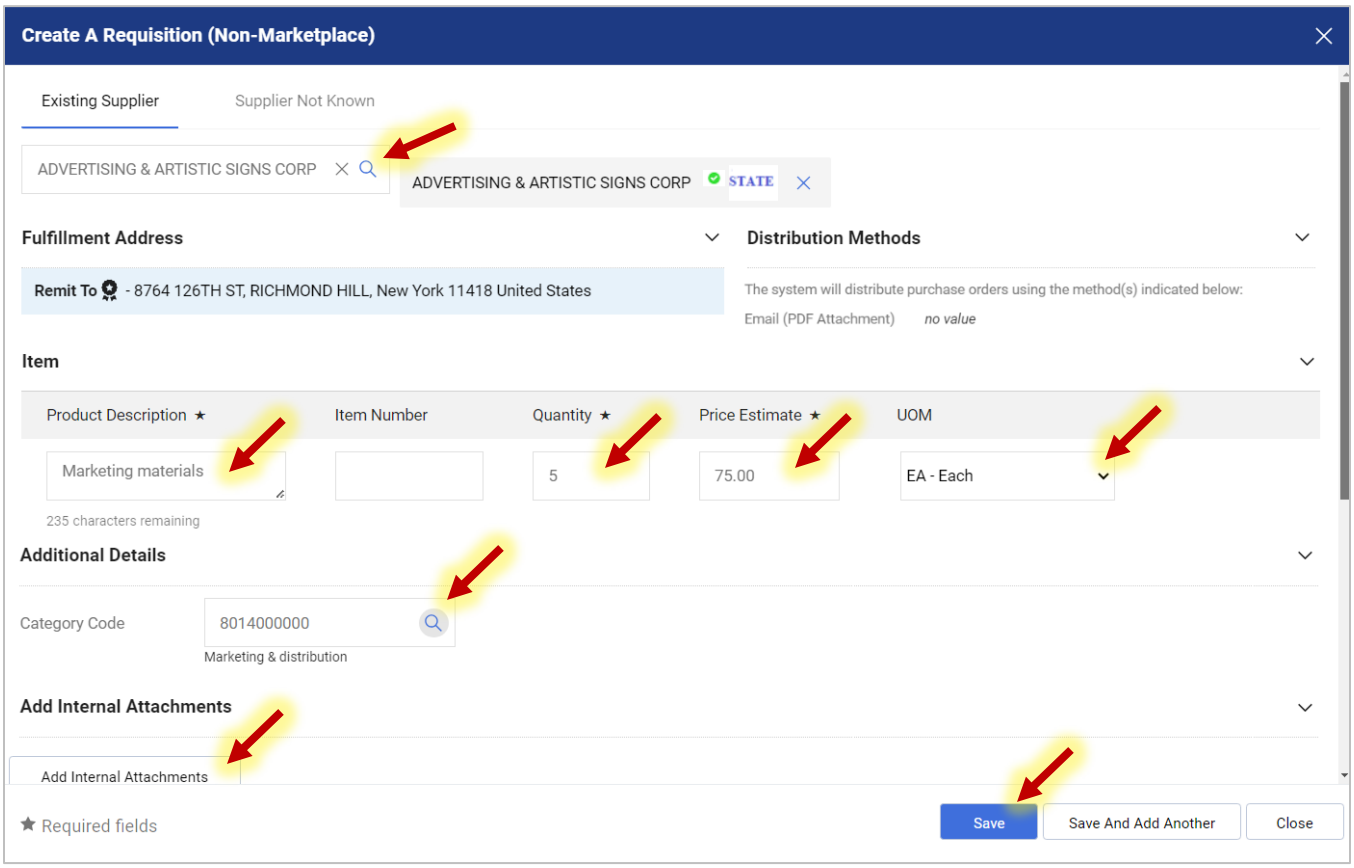


You can access the link for **Creating a non-Marketplace Requisition** in the **Quick Links** section of the home page.



Enter the required elements in the **Create a Requisition (Non-Marketplace)** window.

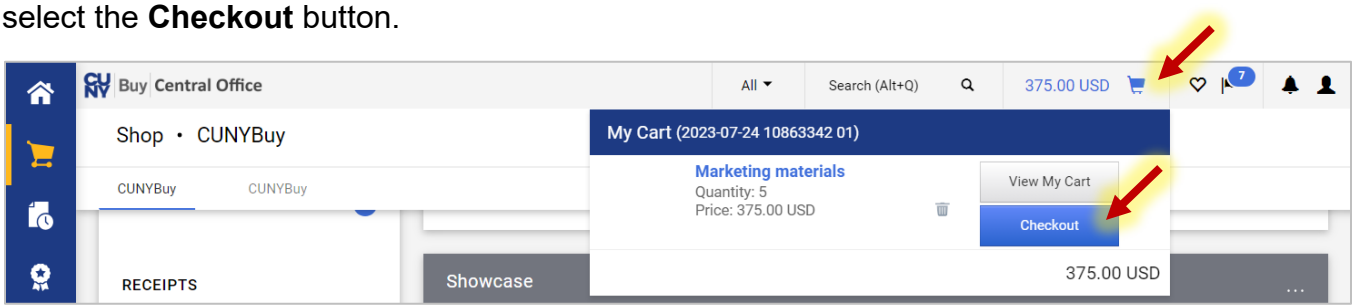
- **Supplier**
  - **Existing supplier** – Type in the name of supplier and choose the correct supplier from the dropdown menu or use the **Search** icon to view the full list of suppliers.
  - **Supplier Unknown -** Click the **Supplier Not Known** tab at the top of the page if supplier is unknown.
- **Fulfillment Address** – is automatically provided when an existing supplier is selected.
- **Product Description** – Briefly describe the products you are purc
- hasing.
- **Quantity** – Enter the quantity of products you are purchasing.
- **Price Estimate** – Enter the price based on a quote from the vendor or an estimate if a quote is not available.
- **UOM (Unit of Measure)** – Select the correct unit of measure from the dropdown menu.
- **Category Code** – Use the **Search** icon to select the appropriate category code. You can search by number or by description.
- **Add Internal Attachments** – Use this button to browse for documents to attach. These attachments are not required but are helpful.



Click the **Save** button to add this single-line requisition to your cart. To add more lines to this requisition, click the **Save and Add Another** button.

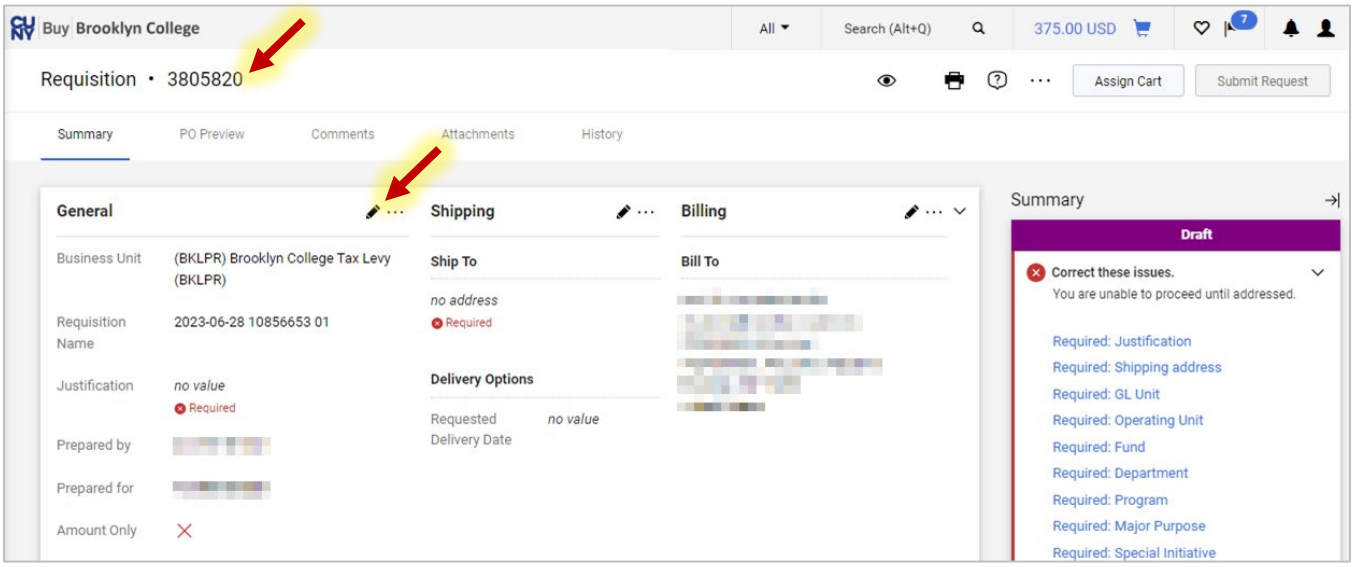
Note: Adding the requisition to cart does not submit it.

The amount of your requisition is now indicated next to the cart. Click on the **Cart** icon and select the **Checkout** button.



There are several key items to note and information that is required on this page. Not that a requisition number has been assigned. The **Draft** box in the **Summary** section indicates that there are corrections to be made on this page.

Click the **Edit General Section** pencil icon next to the **General** section to edit the requisition name and enter in the justification.

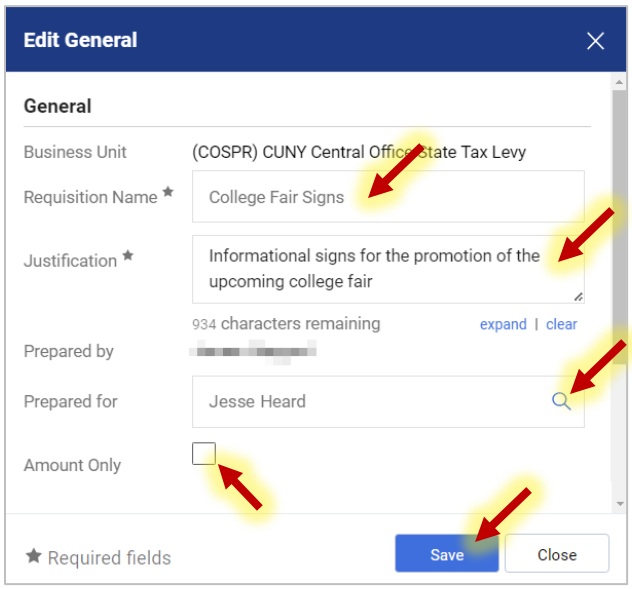


Requisition Name - It is a best practice to rename the requisition with a name that is meaningful to the Creator so that this requisition can be easily identified in the future.

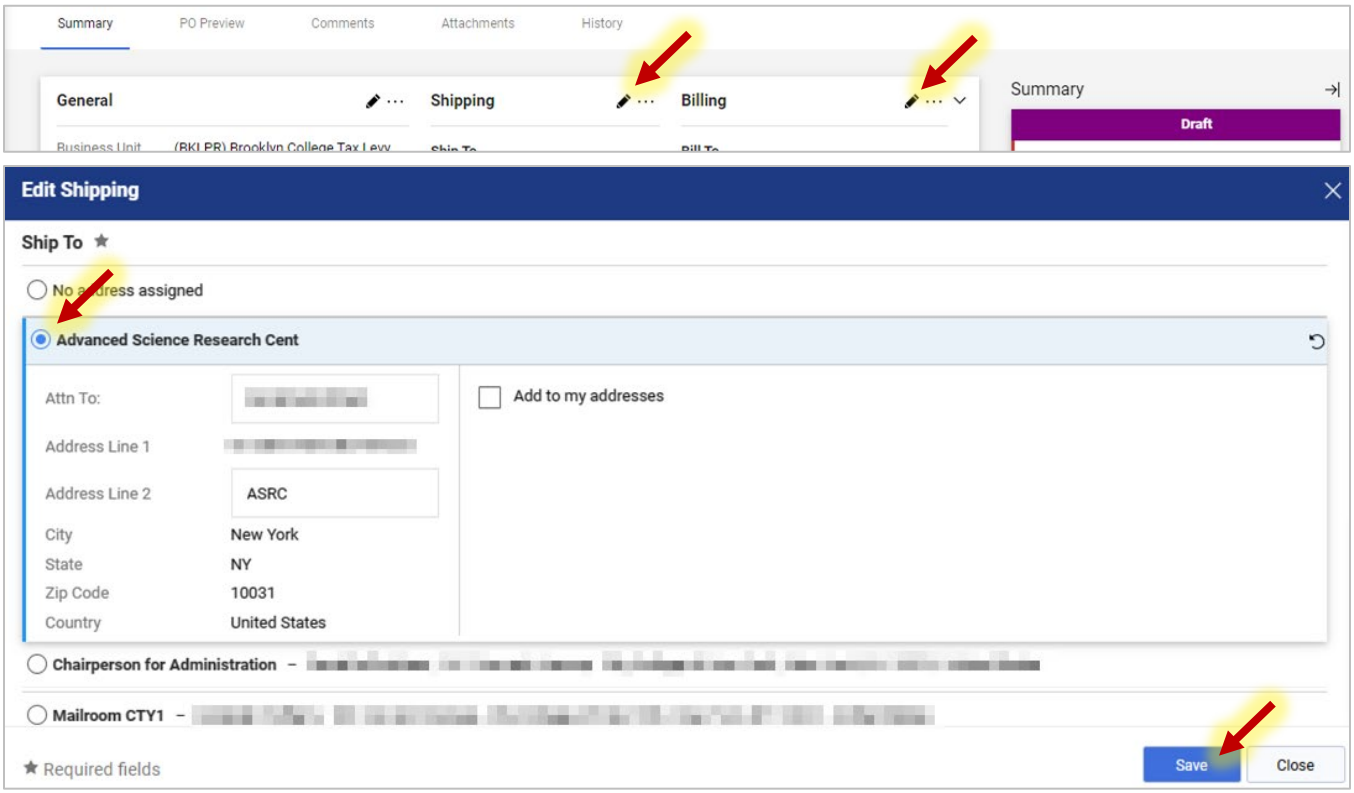
There are several key fields on this page:

Justification – enter justification details for this purchase.
Amount Only – check the box for amount-only requisition. Quantity must be 1 (one).
Period of Service – Enter dates for subscriptions and services (if applicable).
Prepared for – enter name or use the **Search** icon if preparing for another person.

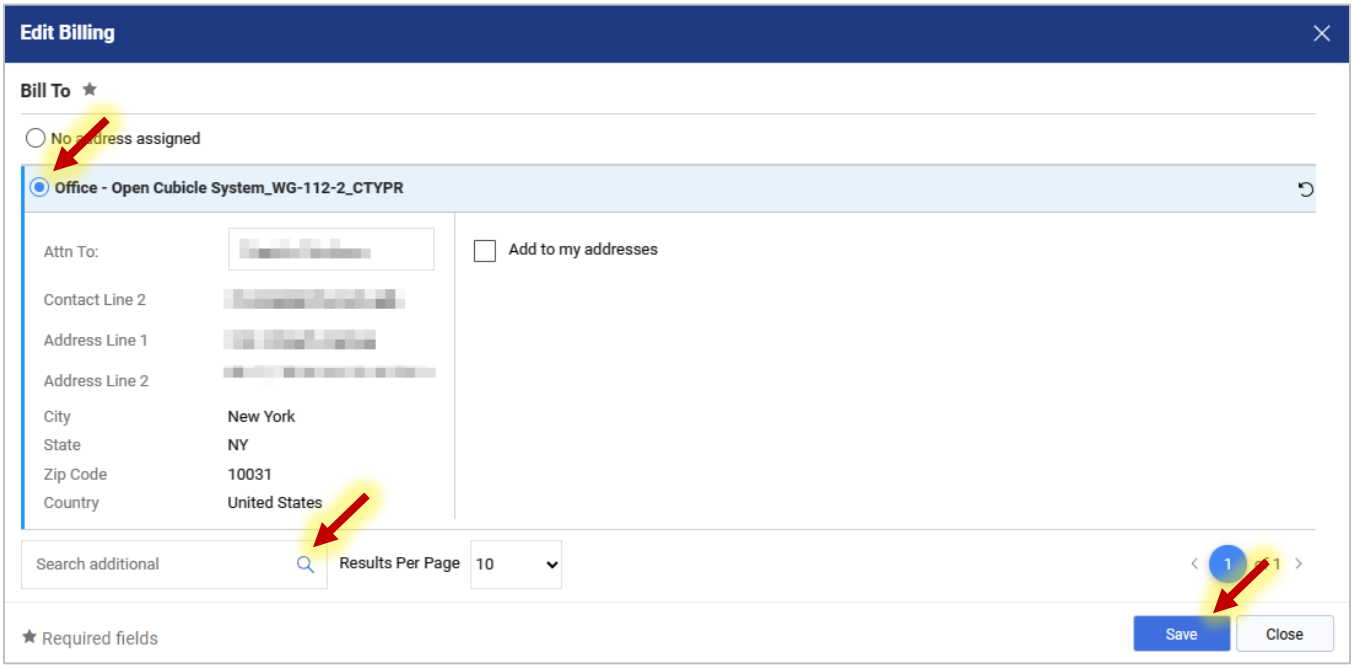
Click the **Save** button when done.



Select the Shipping and Billing addresses by click on the **Edit Shipping Info** pencil icon in the **Shipping** section and the **Edit Billing Info** pencil icon in the **Billing** section.



Ship To - Select one of the available shipping addresses on the list and click the **Save** button.
Note: If an address is not listed, you must submit a Service Now ticket to add the address.

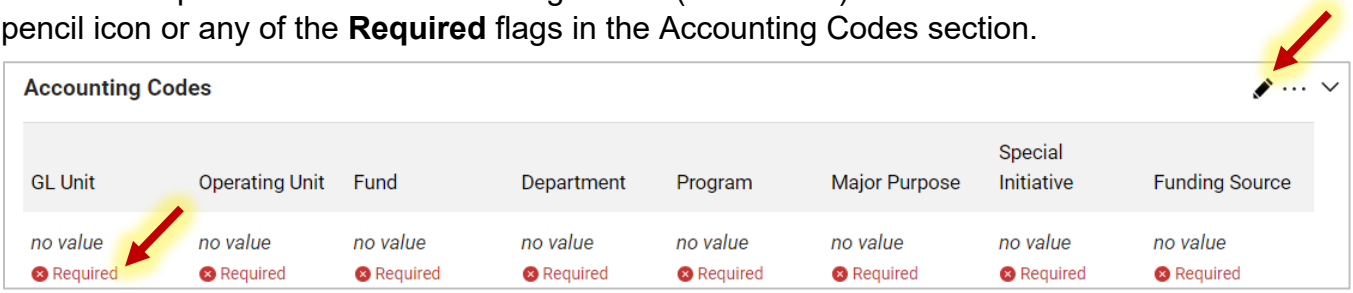


Bill To - Click on the **Search additional** magnifying glass icon to see the options. Select the correct Accounts Payable address from the drop-down menu and click the **Save** button**.**

Note: Billing address **must match** the business unit (BU). Therefore, you must never enter a default billing address in your profile. If a billing address does not match the BU, an error will result and your requisition will not move forward.

Continue going through the list of issues in the **Summary** section.

The next step is to enter the Accounting Codes (Chartfields) for this transaction. Click the **Edit** pencil icon or any of the **Required** flags in the Accounting Codes section.



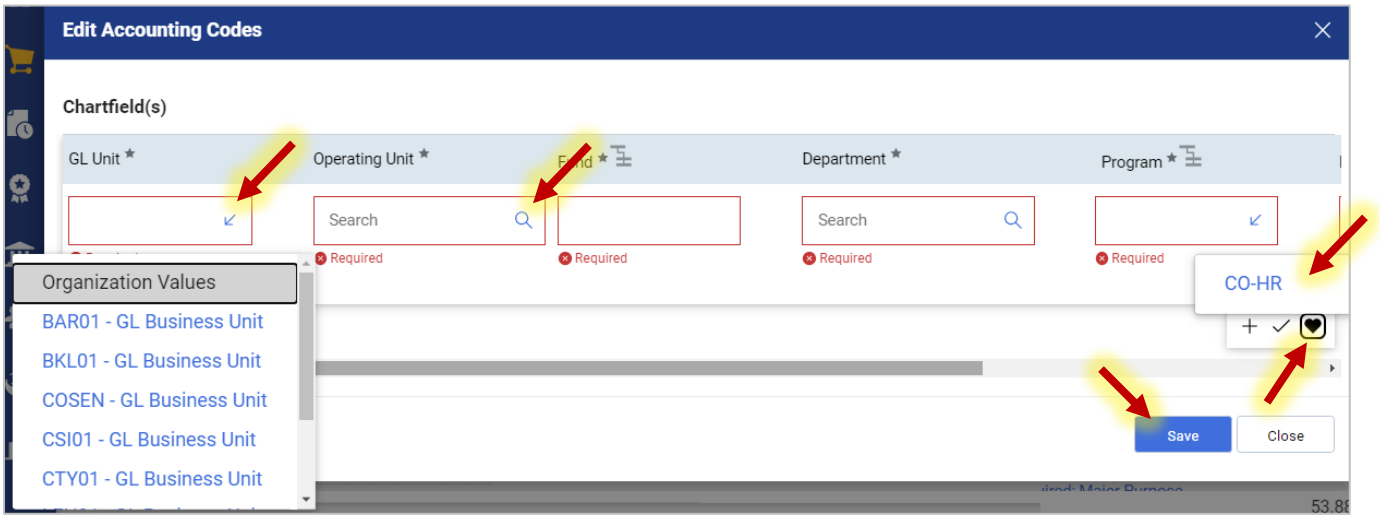
Chartfields can be entered directly into the fields or selected using the dropdown menu and search icons. If you have previously created chartfield favorites, you can select them by clicking the **Code Favorites** heart icon and selecting from the dropdown menu.

Note: Talk to your business office regarding any questions about chartfield strings.

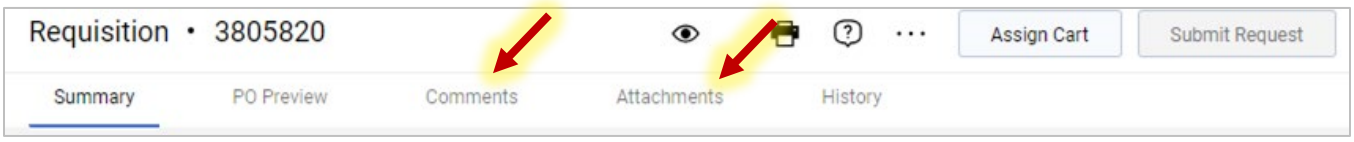
The **Add Split** plus icon allows you to add an additional chartfield string if needed. When adding an additional chartfield string(s), the percentage fields must add up to 100%.

You can validate the chartfield string by selecting the **Recalculate/Validate** checkmark icon.

Click the **Save** button once you have entered and validated the chartfields.

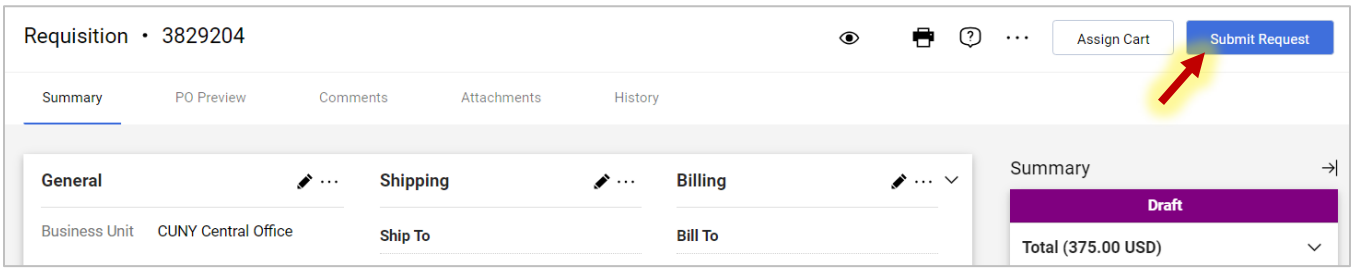


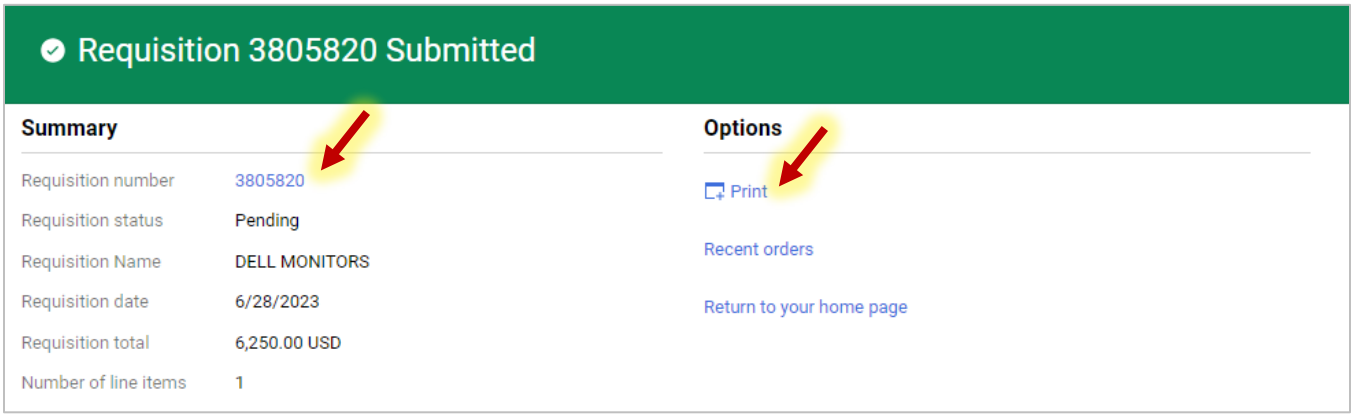
Note that the main page has **tabs** labeled **Comments** and **Attachments**. Use these tabs to enter requisition support information for internal CUNY review. All communications and supporting materials for requisitions should be entered into CUNYBuy to maintain a complete record in one location, allowing any authorized person to derive information and status.



At this point the **Draft** box in the **Summary** section should have no additional corrections indicated. If there are any additional corrections required, correct them at this point.

Once the requisition page is complete, click on the **Submit Request** button on the top right of the page. This will finalize your requisition and submit it into workflow. You will see a submission confirmation screen. You can click the **Print** link to print the receipt or select the **Requisition number** link to view the status of the requisition as it goes through the workflow.



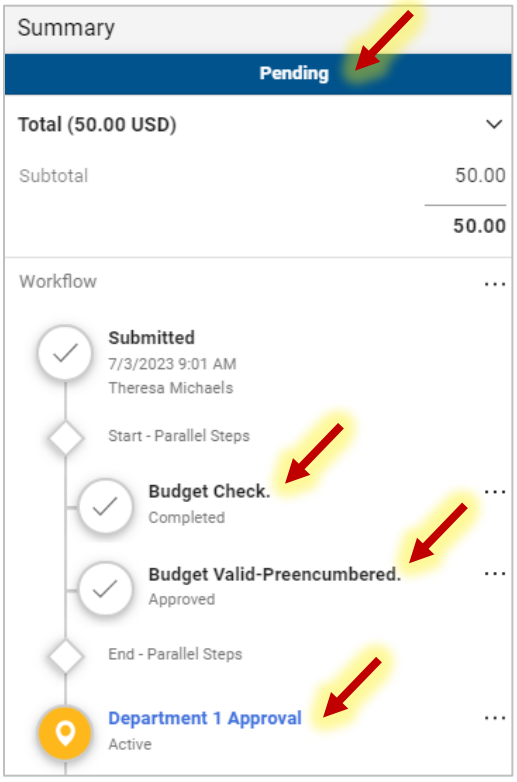


Once the requisition is submitted, its status changes from **Draft** to **Pending**. As you scroll through the **Summary** section, you will see that the **Budget** has already been checked and the **Budget Pre-encumbrance** has been set.

Note: The budget is checked automatically in CUNYBuy and it is checked prior to any approvals.

As you scroll down further in the **Summary** section, you will be able to see the approvals that are required for this requisition. Unlike CUNYfirst, there is no requirement for Supervisor approval. In CUNYBuy, requisition approvals are based on two criteria:

- The department associated with the requisition.
- The dollar value of the requisition
  - A requisition with a value of less than $2500, requires one level of approval (Department 1 Approval).

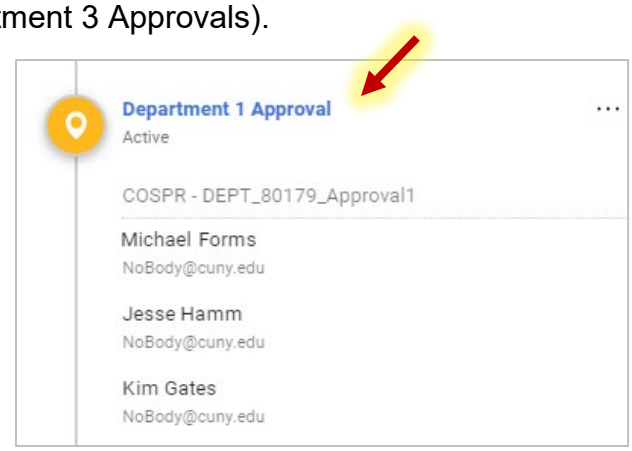


- A requisition with a value of $2500 or greater and less than $10,000 requires two levels of approval (Department 1 and Department 2 Approvals).
- All requisitions with a value of $10,000 or greater require three levels of approval (Department 1, Department 2, and Department 3 Approvals).

Click on the **Department Approval** link to view the list of approvers.

Category approvers are also indicated if the category code of the requisition requires that approval.

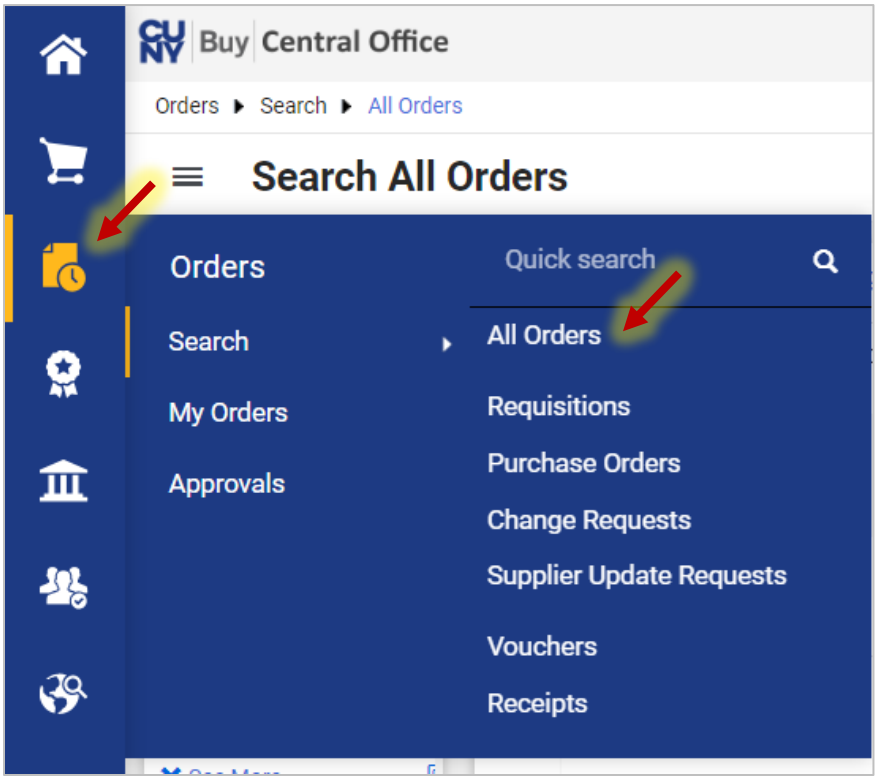
The requisition will be sent to the approval queues of the identified approvers automatically through CUNYBuy workflow.

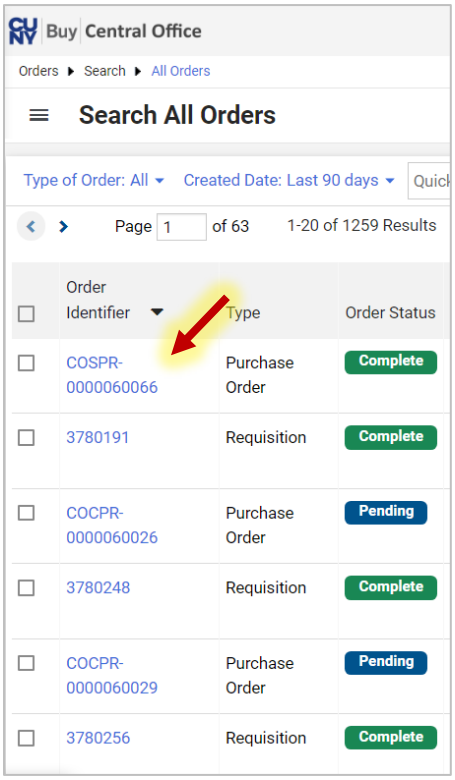


Check the Progress of a Requisition/Purchase Order

Click on the **Orders** icon in the left-hand menu and select the **All Orders** option from the pop-up menu.

The **Search All Orders** page contains a significant amount of information. See the status and details of requisitions, purchase orders, vouchers, etc. by clicking the **Order Identifier** link.

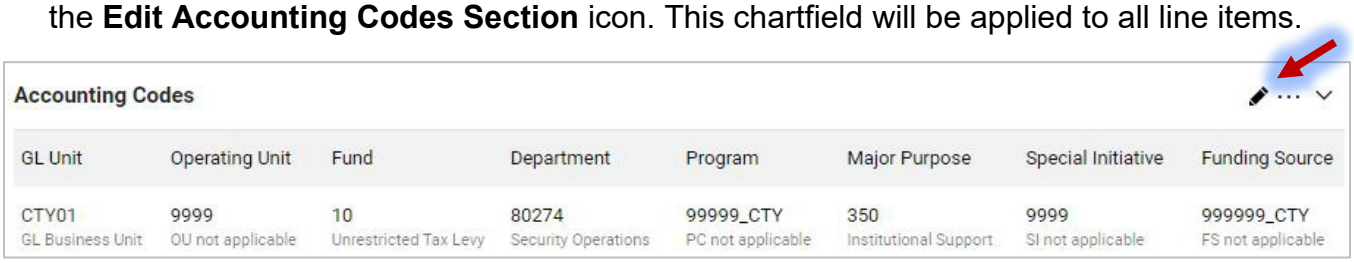




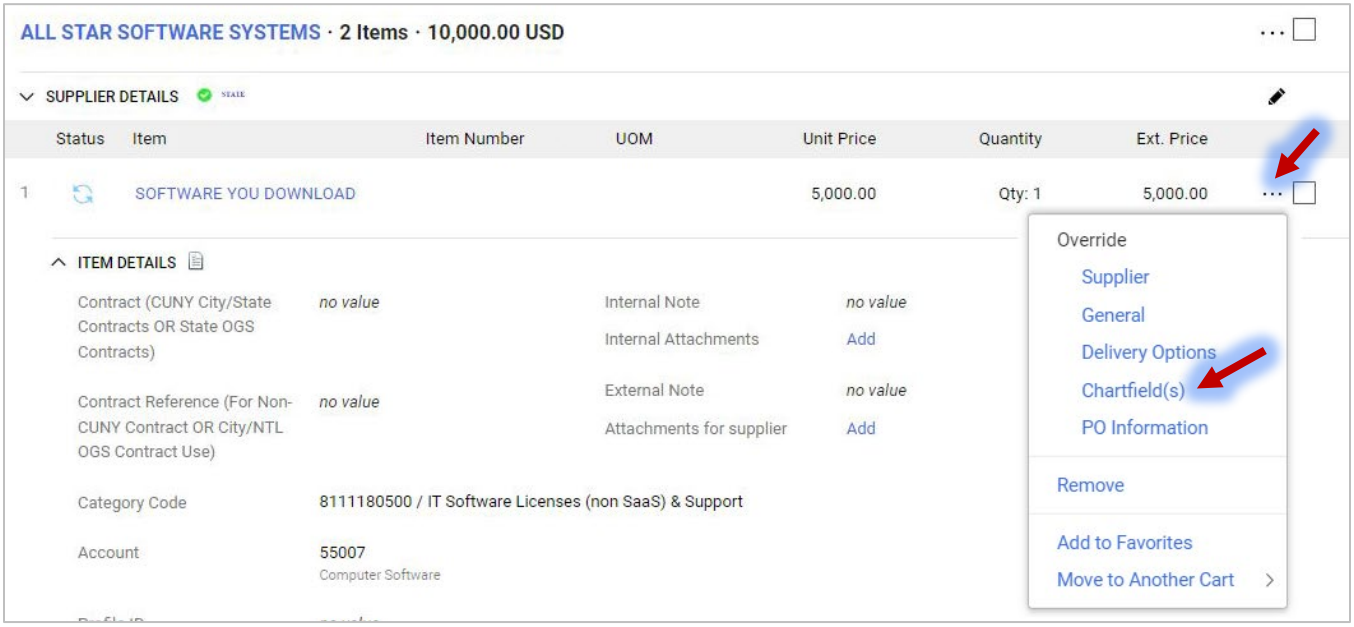
Different Chartfields For Multiple Line Requisitions

For multiple line requisitions, you **must** change the chartfield on each item line at checkout.

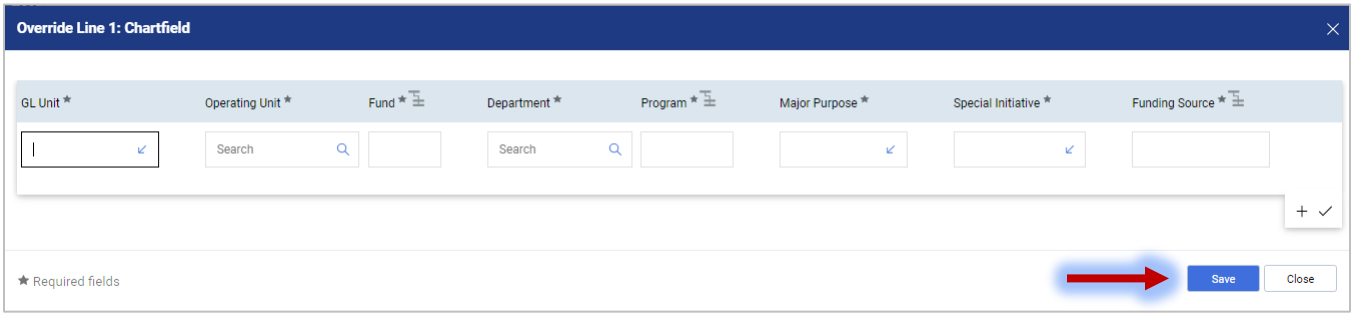
1. Navigate to the Summary tab of your requisition and scroll down to **Accounting Codes**.
2. You must start by entering the chartfield in the **Accounting Codes** section by clicking on the **Edit Accounting Codes Section** icon. This chartfield will be applied to all line items.



3. Scroll down to the Line Items section and click the **Line Item Actions** ellipses icon. Select **Chartfield(s)** from the dropdown menu.



4. Enter the new chartfield in the **Override Line: Chartfield** box and click the **Save** button.



Important Notes:

- Always verify/change if needed your Business Unit (BU) when you start a process.
- Always start with an empty cart.
- Once a marketplace requisition receives all approvals, it is automatically sourced to a PO.
- When searching for requisitions, if it is not found through the search function, check your cart. A requisition that does not pass budget will be automatically returned to your cart as a draft.
- Do not set a billing address as default. If the billing address does not match the BU, it will return an error and will not move forward.
- Do all communication via CUNYBuy. No communication related to the requisition should be done outside of CUNYBuy. This way the entire requisition record is complete and whole, allowing anyone with access to the requisition record to have all information needed to act on it.