CUNYFirst Requisition Guide

For Software Purchases

Use this guide to assist in the completion of software requisitions. Use the hyperlinks found throughout this guide to find more detailed instructions on the described procedures.

If the campus IT category approver reviewing your requisition determines that the requested software qualifies as Commercial-Off-the Shelf (COTS), your requisition will be processed through Central Office Procurement. Software qualifies as COTS when:

1.) Software requires minimal customization and is to be installed and run on a CUNY owned or managed computer (e.g., any desktop, laptop, tablet, server, or mobile device)

2.) Purchase price falls between $0* and $20,000. If ongoing, annual costs are included beyond the initial year of purchase, the total cost of the purchase must not exceed $49,999.

*Note that acquiring free software still requires that a requisition be submitted.

REQUISITION PREPARATION

Before you begin creating your requisition, make sure to:

1.) Check the appropriate budget to ensure there is adequate funding for your purchase by running a budget query.

2.) **Know the appropriate category codes (below) and ONLY use the following codes on software requisition line items:**
- **4323000000—Software <$5,000**
- **4323000001—Software >$5,000**
- **5111230300—Software Licenses (<= 12 months)**
- **8111180500—Software License and Support**

3.) Scan all related and necessary paperwork.
   a. The requisition will require any related quotes, contacts, lists of possible vendors, and other related documents.
   b. Make sure personal/sensitive information such as Social Security numbers are not visible in requisitions or attachments.

4.) Complete the Requisition Supplement for Software Purchases.
   a. A completed copy of this form will need to be submitted with your requisition.

CREATING REQUISITIONS

Define Requisition

1.) From the Enterprise Menu, Select the Financial Supply Chain link. Navigate to: eProcurement > Create Requisition. If prompted, enter your Business Unit, Requester ID and click on Ok.

2.) Under the Special Request tab, click on Special Item hyperlink.

Add Items and Services

1.) Enter all required information including Item Description, Price, Quantity, Category Code **(see category codes listed above and DO NOT use codes that are not listed above for line items on THIS requisition)**, and Unit of Measure (Example: EA). Vendor ID is not required.
    a. For Item Description, be sure to list the full name of the software and any other identifying details available (update versions, relevant operating systems, etc)

2.) Repeat for any additional line items that are included in this requisition.

3.) Click on Review and Submit.

Review and Submit

1.) Review that all chartfields are correct.
    a. Remember that all requesters have a set of default chartfields (CUNYFirst codes that identify the transactions in the system) designated when they were initially setup in CUNYFirst. If you have any questions about chartfields, please consult with the appropriate supervisor.

2.) Check the “amount only box” for all items included in the requisition.

3.) Attach a completed copy of the Requisition Supplement for Software Purchases.

4.) Once the requisition is ready to be saved, click on Save & Preview Approvals.
    a. **This is especially important for requisitions with multiple line items**, as it will allow you to save requisition progress and then allow you to check for errors and make needed corrections. This will also assign a requisition ID.

5.) Click Submit to initialize the approval process.

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 category approvers), the requisition will be available for the budget check process. The budget check process runs automatically every hour.

TRACKING REQUISITIONS

To track the status of your requisition:

1.) Navigate to eProcurement>Manage Requisitions

2.) Enter as much information as possible to locate the requisition to be reviewed.
    a. For example, Requisition ID, Business Unit, ‘date from’ and ‘date to’ can all help you locate your requisition.

BUDGET ERRORS

If your requisition fails the budget check, you will receive a notification to your email.