Changing Chartfields on a Requisition in CUNYfirst 9.2

1. After you log into CUNYfirst, and click on the link for Financial Supply Chain. The following screen (or a similar one depending on your access) should appear:



2. From the Employee Self Service drop-down menu, select Procurement Operations.



3. Next, select eProcurement.



4. The following screen will appear. For tax levy requisitions, enter the Business Unit as BCCPR and then enter your requisition number, with five leading zeros. Click the search button, and CUNYfirst will display the requisition name and status. In the select options field, click on Edit the click the Go button. If you select My Requisitions, select the option to edit your requisition and skip to step 6.

Procurement Operations				eProc	urement			ធ	Q	۵.	:	\oslash
Requisition	^	Manage Requisitions						Ne	w Wind	ow Help	Person	alize Page
Manage Requisitions		Search Requisitions To locate requisitions, edit the criteria belo	v and click the St	arch hutton								
Manage Requisition Approvals		Business Unit BCCPR Requisition ID 0000016470		Requisition Nam Request Sta	te	~	Budget Status	~				
Administer Procurement		Date From Requester	Ē	Date 1 Entered E	ro 🛛 🖻		POID	C	2			
Buyer Center	~	Search Clear		Show Advanced Sea	irch							
		Requisitions (2)										
		To view the lifespan and line items for a requirement of the lifespan and lifespa	uisition, click the isition, make a se	Expand triangle icon. lection from the Action	dropdown list and click Go.							
		Requisition Name 0000016470 JRCNMT Accrdt Fees	BU EPT BCCPR	Date Requi	ng Not Chk'd	Total 3,050.00	USD Edit	Go				
		Create New Requisition Revi	ew Change Requ	est Rev	iew Change Tracking	Manage Receip	ots Requisition Report					

5. The following message will appear, and you should click Ok to proceed with the chart field edits.

<pre>< ePro Req Review and Submit</pre>			el	Procuremen				<u>ک</u> (2 4		Ø
Requisition	Manage Requisit	ions						New Wi	ndow Help	Person	alize Pa
Manage Requisitions	Search Requisition	ns	d allah iku Panada kadhar								
Manage Requisition Approvals	Business Uni	it BCCPR	Q Requisitio	on Name				Q			
	Requisition ID	0000016470	Q Requi	est State		Sudget Status		~			
Administer Procurement	Date From	n	33	Date To	9						
	Requeste	¢ l	iq En	itered By	<u>a</u>	POID		Q			
	Requisitions To view the lifes To edit or perfor	5 Å		OK Can	cel						
	Req ID Req	ulsition Name	BU Date BCCPB 01/05/2022	Request State Peodino	Budget Not Chk'd	3 050 00 USD Edit	✓ G0				
	Create New Requisition	Review C	hange Request	Review Change	Tracking	Manage Receipts Re	quisition Report.				

6. When the Edit Requisition screen appears, you have two options; to edit individual lines or to edit all lines on the requisition. Select the individual line or select all and click the small gray arrows on the left side of your screen next to the line description.

✓ eProcurement	Edit Requisition	- Review and Submit	ώ	Q	۵	0
Edit Requisition - Review and Submit Review the item information and submit the reg for approval.	ņ		New W	findow Hel	p Persona	lize Page 🔺
Requisition Summary		My Preferences 🦥 Requisition Settings				- 1
Business Unit BCCPR	Bronx CC - CUNY Requisition	Name JRCNMT Accrdt Fees-EPT				- 1
Requester 16007432 *Currency USD	Bibi Yusuf-Moore Requisit	ion ID 0000016470				
Cart Summary: Total Amount 3,050.00 USD						- 1
Expand lines to review shipping and accounting details		Add More Items				- 1
Requisition Lines 👔						- 1
Line Description Item ID	Supplier Quantity L	IOM Price Total D	letails Comments Delete			- 1
I and JRCNMT Sponsor Fee (Joint Revi	1.0000	'ears 1475.0000 1475.00	🖹 🦻 Edit 🗍			- 1
JRCNMT Affiliates Fees	9.0000	fears 175.0000 1575.00	🖺 🖓 Add 🗊			
Select All / Deselect All Select lines to:	Add to Favorites Add to Template(s)	Delete Selected				
		Total Amount 3,050.00 USD				

7. If you are only changing one line, click on the small gray arrow for accounting lines. Alternatively, if you want to apply the change to all lines, click mass changes (make sure you checked the box for Select All). You should see a screen that shows fields for accounting information. Please enter the GL Unit for your requisition. Note you should use BCC01 for all tax levy requisitions. To locate additional accounting chartfields, click the buttons Chartfields2 or Chartfields3.

<pre>< eProcurement</pre>	Edit Lines/Shipping/Accounting for Selected Lines	×		ណ៍	r Q	\Diamond	\oslash
Ad	T Line Information @	Help					^
Attenti	Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data or entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.						
Due	D Supplier ID Q. Supplier Location Q.						
Accounting Line	5 Buyer Q. Category Q.						
2 pp JRCNMT Affiliates Fees (Joint	Shipping Information	- 1	P Add	Î			
Shipping Line 1 *Sh Adi	Ship To Location Q Add One Time Address an Due Date B Attention						
	Accounting Lines	.					
Attenti	on SpeedChart Q						
Due	Please enter GL Business Unit before selecting other chartfield values						
Accounting Line	Accounting Information Personalize Find First 1 of 1 Last 5 Chartfields1 Chartfields2 Chartfields3 Details Asset Information TTTP						
Select All / Deselect All Select lines	Dist Percent Location GL Unit Account						
	1 Q BCC01 Q I I						
	Load Values From Defaults						
Shipping Summary							
C Edit for All Lines							
Ship To Location BXCC-RB Address 161 Hall of Fame Te	UK Cancel						
Bronx Community C	0						
Brony NV 10452							

8. Chartfields2 includes fields for operating unit, fund, department, program major purpose and special initiative. Chartfields3 includes the field for funding source. Enter the updated chartfield codes and click the OK button.

<pre>< eProcurement</pre>	Edit Lines/Shipping/Accounting for Selected Lines	×		ណ៍	Q	\bigtriangleup	:	\oslash
AGO	Line Information @	Help						^
Attentio	Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.							
Duer	Supplier ID Q Supplier Location Q							
Accounting Lines 2 ex Z JRCNMT Affiliates Fees	Buyer Q Category Q	0	Add	Û				
Cloint Shipping Line 1 "Shi Add	Ship To Location Q. Add One Time Address Due Date 3 Attention	E	-					
	Accounting Lines	- 1						
Attentio Due I	SpeedChart Q. Please enter GL Business Unit before selection other chartfield values	- 1						
	Accounting Information Personalize Find [2] First (1 of 1) Last Chartfields2 Chartfields2 Chartfields3 Details Asset Information (FFF)							
Select All / Deselect All Select lines to	Oper Unit Fund Dept Program MP Sp Init							
Shipping Summary	Load Values From Defaults							
Edit for All Lines Ship To Location BXCC-RB Address 161 Hall of Fame Ten Torus Community Co	OK Cancel							

9. If you are applying changes to all the lines in your requisition, select "All Distribution Lines" and click OK.

<pre> eProcurement </pre>		Edit Requisition - Review and Submit	ណ	Q	۵	:	\oslash
	Attention To Due Date	Bibi Yusut-Moore 03/01/2022 (F)					î
2 2 JRCNMT Affiliates Fees (Joint		Distribution Change Options					
Shipping Line 1	"Ship To Address Attention To Due Date	BitXC Help 181 Hi For the selected requisition lines that are available for sourcing, apply distribution changes to Brows For the selected requisition lines that are available for sourcing, apply distribution changes to Brows Apply changes to all existing distribution lines. Objective Matching Distribution Lines Apply changes to each existing distribution line by matching the distribution line numbers. Replace Distribution Lines					
Select All / Deselect All	Select lines to:	Remove the existing distribution lines and replace with the distribution lines changes.					
Shipping Summary Edit for All Lines Ship To Location Address	BXCC-RB 161 Hall of Fame Terrace Bronx Community College						

10. On the next screen, click "Save and Submit"

<pre> eProcurement</pre>	Edit Requisition - Review and Submit	ώ	Q	\Diamond	:	Ø
	Total Amount 3,050.00 USD					1
Shipping Summary						
Edit for All Lines	RXCC-RB					
Address	161 Hall of Fame Terrace Bronx Community College Bronx, NY 10453					
Attention To	Bibi Yusuf-Moore					
Requisition Comments						
Enter requisition comments						
Send to Supplier	Show at Receipt Shown at Youcher					
Approval Justification						- 1
Enter approval justification for this re-	quisition					- 1
To be charged to 65013-Job Linkag	es. Budget account was changed for both lines when creating requisition.					
Check Budget	Budget Checking Status Not Checked					
😼 Save & submit 🔡	Save for Later Add More Items 63 Preview Approvals					

11. CUNYfirst should display a confirmation screen. You will see that the requisition is re-routing for approvals. To confirm that CUNYfirst accepted your changes, click the view printable version link to review the updated chartfields.

✓ eProcurement	Confirmation
Confirmation	
Your requisition has been submitted.	
Requested For Bibi Yusuf-Moore	Number of Lines 2
Requisition Name JRCNMT Accrdt Fees-EPT	Total Amount 3,050.00 USD
Requisition ID 0000016470	Approval Justification
Business Unit BCCPR	To be charged to 65013-Job Linkages. Budget account was changed for both lines when creating requisition.
Status Pending	
Priority Medium	
riony weath	
Budget Status Not Checked	
Siew printable version	
Supervisor Approval	
JRCNMT Accrdt Fees-EPT:Pending	Start New Path
Supervisor Approval	
Luis Montenegro Supervisor by Userld	
Dept/Category Approvals	
 Line 1:Initiated JRCNMT Sponsor Fee (Joint Review Committee on Educational Programs in Nuclear Medicine T 	♥ View/Hide Comments Technology) ● Start New Path
Department Approval	
Not Routed Not Routed Luis Montenegro Multiple Approval 1 Department Manager Approval 1 Department Manager Approval 2	-+

12. Here is the printable version of the updated requisition with updated chartfields:

Business Un	nit: BCCPR	Reques	ter: 16007432			Status: Pending /	Approval
Requisition:	0000016470	Reques	ted By: Bibi Yus	uf-Moore		Currency: USD	
Requisition	Name: JRCNMT Accrdt F	ees-EPT Entered	Date: 1/5/22			Requisition Tota	I: 3,050.00
Header Com	ments:						
To be charge	d to 65013-Job Linkages.	Budget account was changed	for both lines w	nen creating requ	uisition.		
Line: 1	Item Description: JRCNI Committee on Educationa Technology)	VT Sponsor Fee (Joint Review al Programs in Nuclear Medicine	Quantit	/: 1.0000	UOM: YRS	Price: 1475.0000	Line Total: 1,475.00
							Line Status: Pending
Line Commer Attached to lin	nts: ne 1 is the 2022 JRCNMT a	ccreditation invoice					
Ship Line: 1 Attention: Bit Ship Via: UPS	bi Yusuf-Moore S REG	Ship To: BXCC-RB Due Date: 3/1/22 Freight Terms:FOB		Address: 161 Hall of F Bronx Comm Bronx NY 10 United State	ame Terrace nunity College 0453 s	Sh Sh	ipping Quantity: 1.0000 ipping Total: 1,475.00
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	LH-11A	1.0000	100.00	1,475.00	BCC01	52551
Dept	Oper Unit	Fund		Program		MP S	p Initt
65013	9999	10		99999		100	9999
	Open QTY				Open Amt		
	1.0000				0.0000		
	CL Base Amount	Curronau		Somuonac		Conitalia	
	GL Dase Amount	Currency		Sequence		Capitaliz	.e
	1,475.00	080		0		N	
	Fund Src						
	999999						
Line: 2	999999 Item Description: JRCNI Committee on Educationa Technology)	MT Affiliates Fees (Joint Review Il Programs in Nuclear Medicine	Quantit	/: 9.0000	UOM: YRS	Price: 175.0000	Line Total: 1,575.00