

## How to Submit Research Requisition on Self Serve

On the SUNY ipage, click on the Self Serve quick link.

UPSTATE MEDICAL UNIVERSITY State University of New York Inside Upstate

HOME ALL STAFF STUDENTS FACULTY RESEARCHERS HEALTHCARE PROVIDERS ADMINISTRATORS

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Inside Upstate

COMMUNITY GIVING CAMPAIGN E-Pledge begins Oct. 3

WITH DISTINCTION A BLOG OF OUTSTANDING FACULTY AND STUDENTS

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Log in with user name and password.

UPSTATE Self-Serve

**Self-Serve to My Information**

With Self-Serve, you can review administrative information about yourself and update some of that data online, eliminating the need to complete paper forms. You can also access and update data about individuals you supervise. At your department director's discretion, you can be given access to additional functions and reports depending on your responsibilities.

**Log in using your Upstate Network Account's username and password.**  
If you've forgotten your password, call the IMT Help Desk at 464-4115.

User Name

Password

Log In

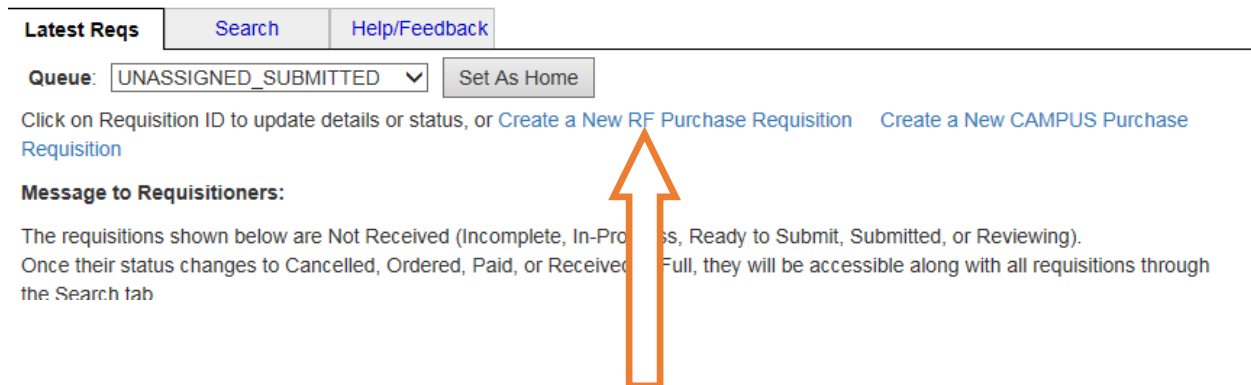
[Reset Password](#)

[First Time User?](#)

Select the applications drop down menu. Click on purchasing.



Click on Create a New RF Purchase Requisition.



Self-Serve will automatically populate with your name and contact information.



### Purchase Requisition

[Purchasing Home](#) | [RF Online Requisitions Home](#) | [Insert New Requisition](#)

<b>Select Project-Task-Award (PTA) First</b>		<b>Requisition Status:</b> IN PROGRESS <input type="button" value="v"/>			
<b>* PTA</b>	<input type="text" value="Select Project-Task-Award"/> <input type="button" value="v"/>	<b>Shipping:</b>	<input type="text" value="Need_Date"/> <input type="button" value="calendar"/> <input type="text" value="Regular Shipping"/> <input type="button" value="v"/>		
<input type="checkbox"/> Split? This Dollar Amt:	<input type="text" value="\$0.00"/>	<b>* Dept</b>	<input type="text" value=""/> <input type="button" value="v"/>		
Created By	<input type="text" value="Heather Lindsay"/> Phone <input type="text" value="464-5720"/>	<b>* Building</b>	<input type="text" value=""/> <input type="button" value="v"/>		
Contact	<input type="text" value="Heather Lindsay"/> Phone <input type="text" value=""/>	<b>* Room</b>	<input type="text" value=""/>		
E-mail List	<input type="text" value="lindsayh@upstate.edu"/>	<b>* Attention</b>	<input type="text" value=""/>		
Supplier	<input type="text" value=""/>	Address	<input type="text" value=""/>		
City	<input type="text" value=""/>	State	<input type="text" value=""/> <input type="button" value="v"/>		
Phone	<input type="text" value=""/>	Zip	<input type="text" value=""/>		
	Fax	SSN/FedID	<input type="text" value=""/>		
Pricing:	<input type="radio"/> Verbal <input type="radio"/> Internet <input type="radio"/> Catalog <input type="radio"/> Other   Date: <input type="text" value=""/> <input type="button" value="calendar"/>   Quote # <input type="text" value=""/>				
Comments:	<input type="text" value=""/>				
Attachment:	<input type="button" value="Browse..."/> (You can attach additional documents after submittal)				
<b>Catalog #</b>	<b>Description</b>	<b>Quantity</b>	<b>Unit</b>	<b>Price</b>	<b>Total</b>
<input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="v"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="v"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="v"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="v"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="v"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
If you need to add more items to this purchase requisition, update requisition after creating record.					Total: <input type="text" value=""/>

\* Required Fields

In the top section, fill out the following information:

<b>Select Project-Task-Award (PTA) First</b>		<b>Requisition Status:</b> IN PROGRESS <input type="button" value="v"/>	
* PTA	<input type="text"/>	<b>Shipping:</b>	
<input type="checkbox"/> Split? This Dollar Amt:	<input type="text" value="\$0.00"/>	Need_Date	<input type="text"/> <input type="button" value="calendar"/> <input type="text"/>
Created By	<input type="text" value="Heather Lindsay"/>	Phone	<input type="text" value="464-5720"/>
Contact	<input type="text" value="Heather Lindsay"/>	Phone	<input type="text"/>
E-mail List	<input type="text" value="lindsayh@upstate.edu"/>		
		* Dept	<input type="text"/>
		* Building	<input type="text"/>
		* Room	<input type="text"/>
		* Attention	<input type="text"/>

**PTA – Select the project/task/award you wish to use.**

**Split – Select if you are using more than one PTA.**

**Need Date – Select the date you need the product. Select regular, overnight, or **rush** shipping.**

**Dept – Use the drop down menu to select your department**

**Building – Use the drop down menu to select the building for the order destination ship to.**

**Room – Type in the room number for the order destination.**

**Attention – Type in the full name of the order recipient.**

**\*\*Scroll to the bottom and select the Save button\*\***

In the middle section, fill out the following:

Supplier	<input type="text"/>	Address	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>
Phone	<input type="text"/>	Fax	<input type="text"/>	SSN/FedID	<input type="text"/>
Pricing:	<input type="radio"/> Verbal <input type="radio"/> Internet <input type="radio"/> Catalog <input type="radio"/> Other   Date: <input type="text"/> <input type="button" value="calendar"/>   Quote # <input type="text"/>				
Comments:	<input type="text"/>				
Attachment:	<input type="text"/>	<input type="button" value="Browse..."/>	(You can attach additional documents after submittal)		

**Supplier – Full name of the supplier**

**City/state/address/phone/zip – Fill in the best you can. This will help Purchasing locate the correct vendor when creating the purchase order.**

**\*Social Security Number (SNN) – If this is a payment to an individual**

**Pricing – Where you found the cost information and date the pricing was found.**

**Quote – If you obtained a quote for the order, type the quote number in this field.**

**Comments – Any additional information or instructions Purchasing needs to know. This field is also used by Purchasing to inform the end user of notes made during the ordering process.**

**Attachment – Use this to upload any quotes, invoices, or information Purchasing will need to place the order/pay an invoice.**

**\*\*Scroll to the bottom and select the Save button\*\***

In the bottom section, fill out the following:

Catalog #	Description	Quantity	Unit	Price	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>

If you need to add more items to this purchase requisition, update requisition after creating record. Total:

\* Required Fields



**Catalog number, description, quantity, unit, and price – Fill this out as accurately and completely as possible. Complete item descriptions helps Purchasing place accurate orders.**

**When everything is complete, change requisition status to READY TO APPROVE.**

ASSIGNED TO:  PO #  STATUS:

CONFIRMED:  Details:

APPROVAL: Req'd  Rec'd  Details:

PROTECTED HLTH. INFO: Yes  No

**\*\*Scroll to the bottom and select the Save button\*\***

**At this point, the requisition is sent to the approving authority.**

**Once approved, the requisition will be assigned to a Buyer in Purchasing, who will place the order. The order status will show Reviewing once assigned to a Buyer. The status will show Ordered once the order is completed.**

When checking on status, if you have any questions, contact the assigned buyer. Their name is located at the top of the screen.

RF Online Requisitions Home | Update Requisition

▪ [View PDF](#)    ▪ [Send Email](#)    ▪ [Create Like Current](#)

REQ\_ID: 49862



ASSIGNED TO:	Lindsay, Heather	PO #	R1050871	STATUS:	ORDERED
				RECEIVED IN FULL:	<input type="checkbox"/>
CONFIRMED:	01/06/2017	Details:	Order # 2005706886683		
APPROVAL:	Req'd <input type="checkbox"/> Rec'd <input type="checkbox"/>	Details:	ETA 1/19		

If the order is in the Reviewing status after a period of time, check the comments and details fields for additional information needed. If there is an issue with the order, the end user will be contacted by the Buyer. In the detail section, the buyer will include date order was placed, confirmation information, and estimated delivery date.

Buyer will also be adjusting pricing to reflect shipping charges, discounts, special fees, etc.