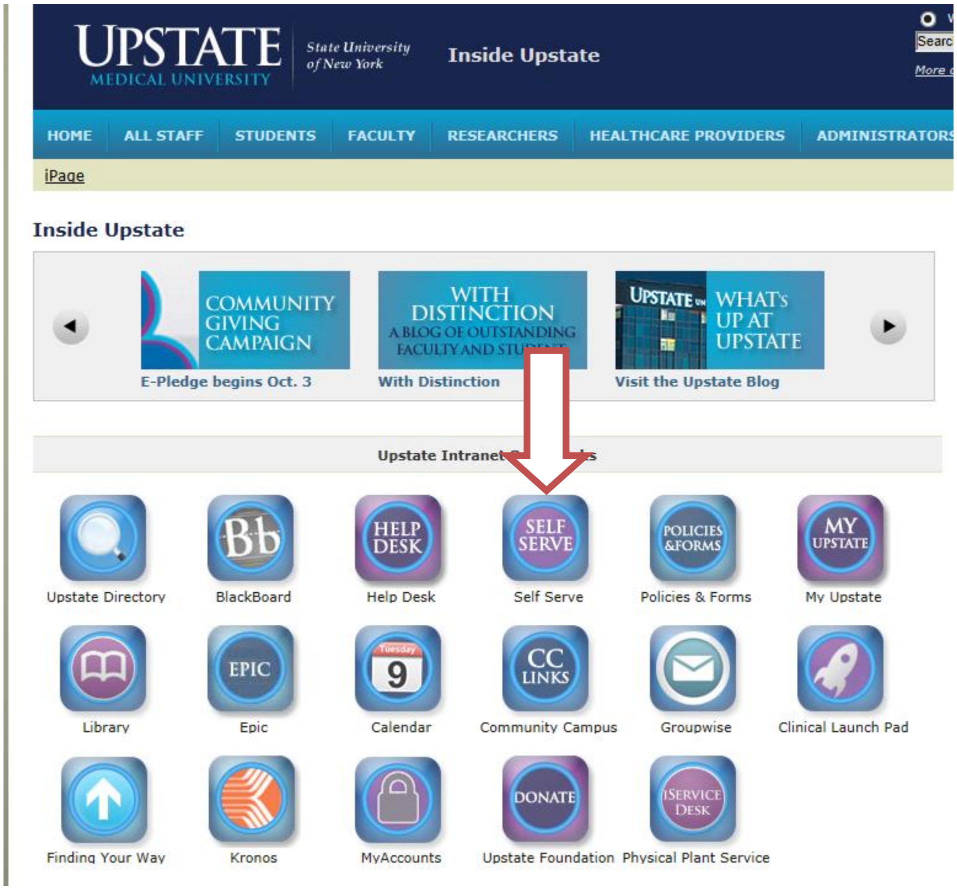
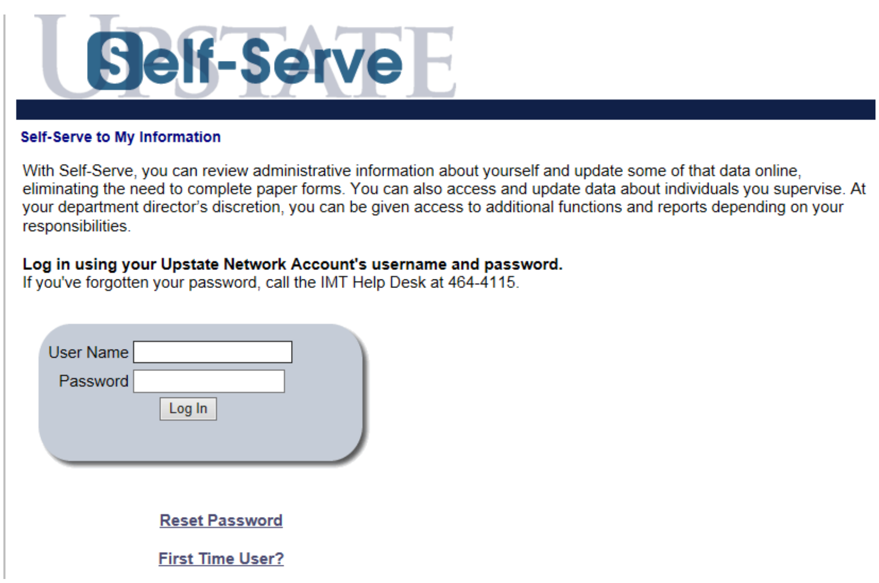
How to Submit a Campus Purchase Requisition on Self Serve

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

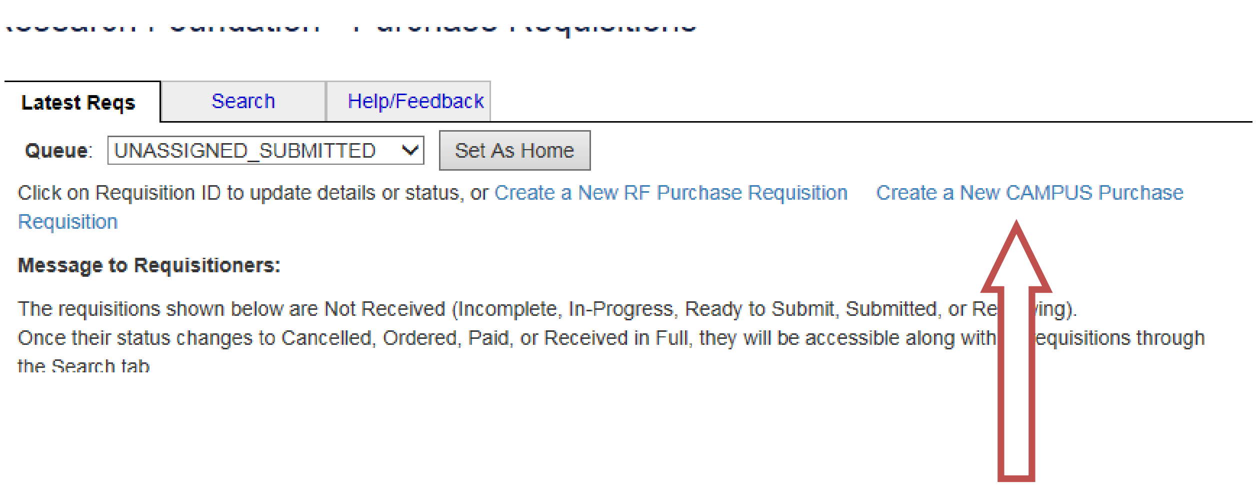


Log in with user name and password.

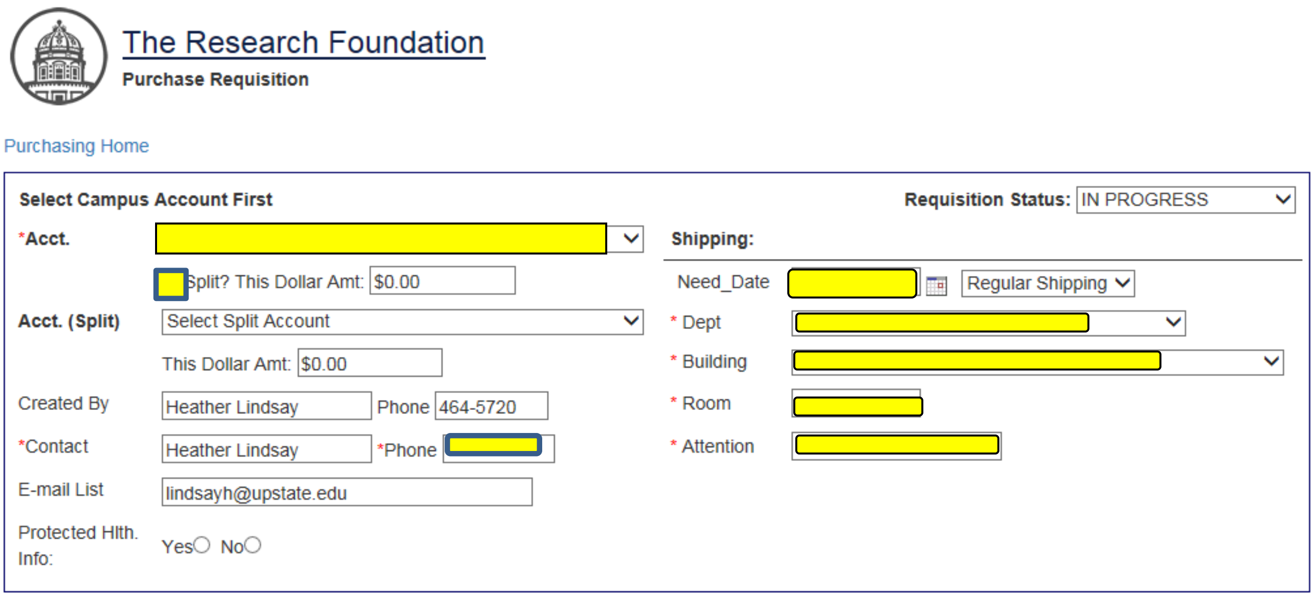


Select the applications drop down menu. Click on purchasing.

Click on Create a New <u>Campus</u> Purchase Requisition.

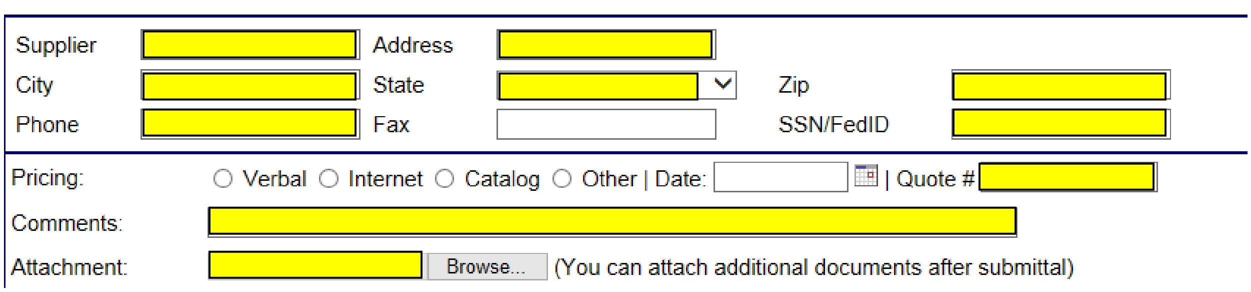


Self-Serve will automatically populate with your name and contact information. In the top section, fill out the highlighted information:



Acct – Select the project/task/award you wish to use.
Split – Select if you are using more than one account number.
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.
****<u>Scroll to the bottom and select the Save button</u>****

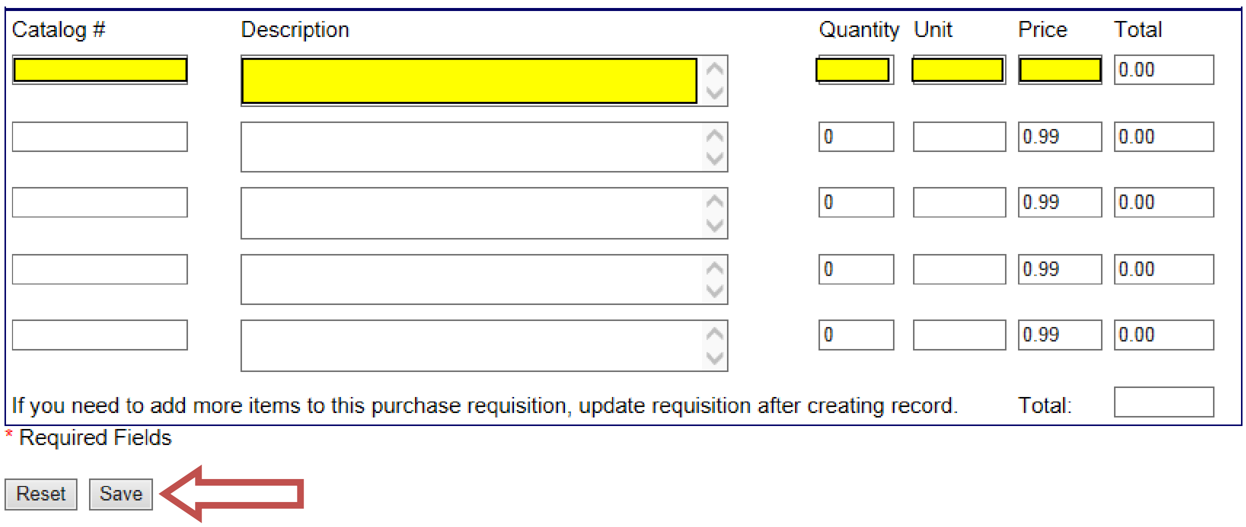
In the middle section, fill out the following:



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.

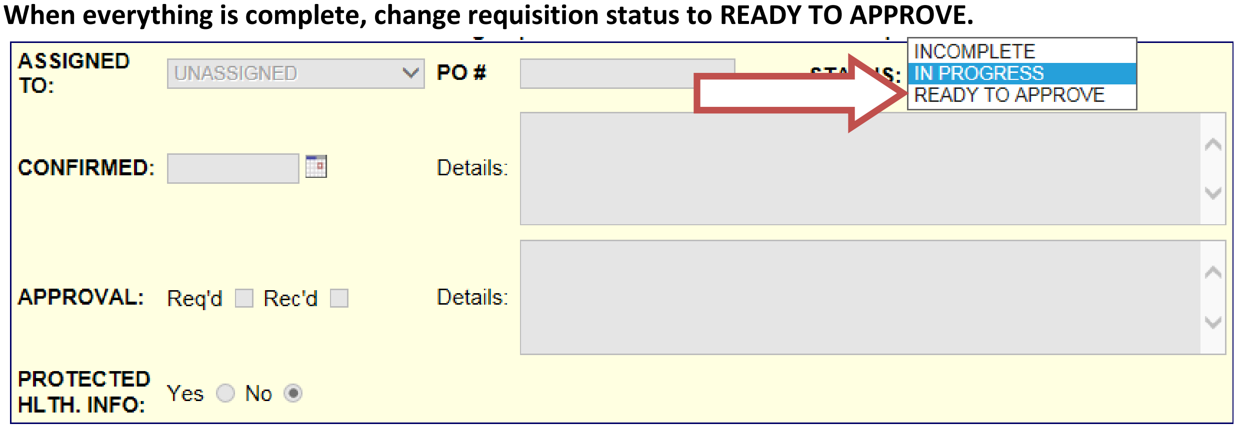
Quote – If you obtained a quote for the order, type the quote number in this field.
Comments – Any additional information or instructions Purchasing needs to know. This field is also used by Purchasing to inform the end user of notes made during the ordering process.
Attachment – Use this to upload any quotes, invoices, or information Purchasing will need to place the order/pay an invoice.
****<u>Scroll to the bottom and select the Save button</u>****

In the bottom section, fill out the following:



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.

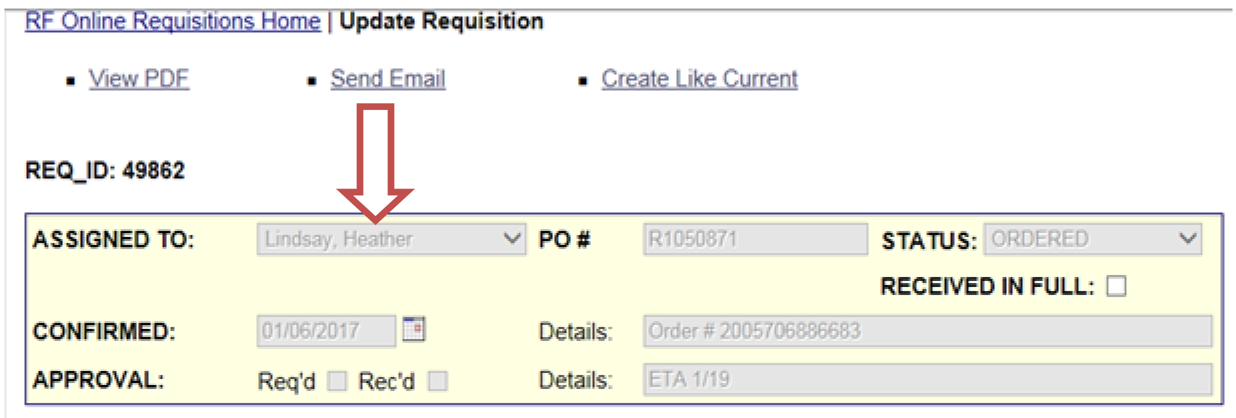


****<u>Scroll to the bottom and select the Save button</u>****

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.



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.