

How to Gain Access to Submit a Requisition on Self-Serve

2/6/2018

On the SUNY iPage, click on the Self-Serve Quick Link

The screenshot shows the Upstate Intranet iPage. At the top, there is a navigation bar with links for Upstate, Patient Care, Academics, Research, Library, Locations, HR, and Groupwise. Below this is the Upstate Medical University logo and the text "State University of New York Inside Upstate". A search bar is located on the right side. The main content area features a "Upstate Intranet Links" section with various icons for services like Upstate Directory, BlackBoard, Help Desk, Self Serve, Policies & Forms, My Upstate, Library, Epic, Calendar, Community Campus, Groupwise, and Clinical Launch Pad. A large red arrow points to the "Self Serve" icon. To the right of the main content, there are several status boxes, including "ED Door to Doctor Time", "DT Adult ED Status", "DT PEDS ED Status", "CC ED Status", and "Hospital Status".

Log in with username and password

The screenshot shows the "Self-Serve Login" page. The page has a dark blue header with the "UPSTATE" logo and the text "Self-Serve". Below the header, the text reads "Self-Serve Login" and "With Self-Serve, you can review administrative information about yourself and update some of your personal information and reports depending on your responsibilities." There is a section for logging in with the text "Log in using your Upstate Network Account's username and password." and "If you've forgotten your password, call the IMT Help Desk at 464-4115." Below this is a login form with fields for "Username" and "Password", a "Login" button, and links for "First Time User?" and "Reset Password".

Once you're on the main page, click on the Help drop-down menu and then click on Account Request Form.

The screenshot shows the main page of the Self-Serve application. At the top right, the date "Tuesday, February 6, 2018" is displayed. Below the date, there is a "Help" button with a dropdown arrow, which is circled in red. To the right of the "Help" button is a "Logout" button. Below the "Help" button, a dropdown menu is open, showing the "Account Request Form" link, which is also highlighted with a red arrow.

Choose "Myself" as the request option, and click Next Step.

Self Serve Request Form

[My Requests](#)

Every Upstate employee is given an Oracle account when hired and is able to access self-service applications that allow display and update of data about themselves. Only individuals whose job responsibilities require access to additional data have to complete this form.

Once complete, your request will be forwarded to your supervisor for initial review. If approved, it will be passed along to the appropriate IMT department for final review and approval.

This request is on the behalf of:

Myself **Someone else**

Make sure all of your information is correct, and click Next.

Self Serve Request Form

[My Requests](#)

Please verify that this is who the request is for:


Name:	Joe S Dokes
ID#:	73799
Phone:	315-464-8888
Department:	Lead Entertainers
Email:	dokesj@upstate.edu
Supervisor:	James Dean



Choose "Request Specific Self Serve Application(s)," and click Next.


Self Serve Request Form

[My Requests](#)

Request Type:  Request Specific Self Serve Application(s)
 Reports
 Banner
 Business Objects
 CPA Applications

Check the box that says “Online Purchasing Requisitions.”

<input type="checkbox"/> My Upstate for Faculty
<input type="checkbox"/> Non-Employee Maintenance
<input type="checkbox"/> Nursing Position Control
<input type="checkbox"/> Online Purchasing Requisitions
<input type="checkbox"/> Patient History Lookup
<input type="checkbox"/> Programming Requests
<input type="checkbox"/> Purchase Authorizations
<input type="checkbox"/> Radiology
<input type="checkbox"/> Record Storage



When you click the “Online Purchasing Requisitions” checkbox, you will see detailed information on this application. You will then have the option of selecting “Insert Only” or “Insert and Submit” privileges.

For State Accounts, select from the drop-down. For Research Accounts, enter the project number(s) in the comment box.

Note: The Department Head has automatic privileges to update access via the Purchase Authorizations application. You do not have to fill out this form if you request access directly from the Department Head. If you continue to submit this form, we will need to obtain prior authorization from the Department Head prior to updating your access. This additional step will take place after your direct supervisor has approved your request.

<input checked="" type="checkbox"/> Online Purchasing Requisitions	<p>This application allows users to create and submit online purchase requisitions. For State Accounts, select from the list below. For Research Projects, enter the project numbers in the comments box below. For Research Projects, Project PI's (Grant Owners) have this access by default and do not need to request rights to the grants they own. Please note: the Department Head and Project PI have automatic rights to issues you these privileges via the Purchase Authorizations application on Self-Serve, without requiring the submittal of this form. If you fill out this form, we will need to obtain authorization from the Department Head or Research Project PI before updating your access.</p> <p>Select Level of Access: <input type="text" value="Insert Only"/></p> <p>Select Department(s):</p> <table border="1"><tr><td>Academic Affairs</td><td></td></tr><tr><td>Access Only / No Dept</td><td>^</td></tr><tr><td>Accounting & Budgeting</td><td></td></tr><tr><td>Accounts Payable</td><td>v</td></tr><tr><td>Advanced Practice Services</td><td></td></tr></table> <p>(User Ctrl Key for multiples)</p>	Academic Affairs		Access Only / No Dept	^	Accounting & Budgeting		Accounts Payable	v	Advanced Practice Services	
Academic Affairs											
Access Only / No Dept	^										
Accounting & Budgeting											
Accounts Payable	v										
Advanced Practice Services											

Once submitted, you will receive an email from IMT_Requests@upstate.edu that it has been received:

“Your Self Serve request has been received. Once approved by your supervisor (enter name here), it will be processed by IMT as soon as possible. You may review the status of your request at any time by visiting the following URL: (Specific URL will be provided).”