Welcome to the CUNYfirst Training Times newsletter for the State Procurement Go-Live. This issue provides information related to training and end user support for current campus activities. The following topics are included in this edition:

3i’s Information, Interfaces, Integration focuses on the processes that can be accomplished in multiple ways, or require multiple users to complete. We will focus on items that may be completed in multiple offices, items that require collaboration with other users, or why information is displayed in a given way.

Working with CUNYfirst addresses items available to the CUNYfirst user. Items will include: understanding various reference materials and providing suggestions to help with the day-to-day processing of transactions in CUNYfirst.

How to… provides step-by-step information to complete processes that are key during this Go-Live period and additional information when completing a process.

We are also working with your campus Help Desk and Security team to address any reported and outstanding issues. If while working in the system, you do not have access, please contact your campus’ Help Desk and refer to the article ‘Security in CUNYfirst’ in the newsletter.

As a final reminder, it is critical to attend training currently being offered at your campus. The trainers have a wealth of information and are providing exceptional knowledge transfer.

Again, welcome to CUNYfirst Procurement.

CUNYfirst Training Manager

In Internet Explorer, claim your CUNYfirst account.

1. Enter home.cunyfirst.cuny.edu in Internet Explorer.
2. Click the First Time Users link.
3. On the Account Activation page, enter all fields.
   - Tip — Use your First and Last Name of record.
4. Type the two words displayed in ReCAPTCHA.
5. Click the OK button.
6. On the Challenge Questions and Answers page, select five questions and enter answers.
7. Click the OK button.
8. On the Choose a Password page, enter and confirm your password.
   
   CUNY Password Policy when choosing a password:
   - 8 or more characters
   - 1 or more uppercase letters
   - 1 or more numeric or special characters
8. Click the OK button to submit the password.
9. On the User Activation Completed Successfully! page, your Empl ID (CUNY ID) is displayed.

In Mozilla Firefox, separately to CUNYfirst, claim your training environment account. This simulated system has your security access linked to your ID.

1. Enter https://cnyeptst.cunyfirst.cuny.edu in Mozilla Firefox.
2. Complete Steps 2-9 as above.
Learning and Support Documentation

Staff access learning activities and support materials to both prepare for Go-Live and guide their use of CUNYfirst at Go-Live.

Classroom Learning
Train the trainers on campus introduce main concepts and key information. Course enrollment is completed in Enterprise Learning Management (ELM) for each campus.

ELM Materials and Documentation
Reference materials are downloaded from ELM.

PowerPoint: Guides the learner through course materials.

UPK (User Productivity Kit): Guides the user step-by-step through a selected transaction in either See It, Try It or Know It mode.

Training Environment (Simulation System)
Here you can practice and recreate your daily work responsibilities. The system contains your approved user security and access.

Repository
ELM reference materials and UPK’s, after having completed classroom learning, are available in the repository.

Accessing Documentation in ELM

To access materials for enrolled courses:
1. Log into CUNYfirst at home.cunyfirst.cuny.edu.
2. Click Enterprise Learning Management (ELM).
3. Navigate to: Self Service > Learning > All Learning.
4. Select the title link of the course for which you want the documentation.
5. Click Notes and Attachment link.
6. Select the file link to open the desired document.

What are the two most common errors in creating a Purchase Order?
1. Forgetting to change the 'dummy' Vendor.
2. Forgetting to change the invalid 'GEN' PO type.

How to... Enroll in Procurement Training

Learning CUNYfirst and how it will be used begins with training on your campus.

Users who request goods and services should attend the ‘Requisitions and Receipts’ course. Buyers in Purchasing attend ‘Purchase Orders’. Staff who organize payment of invoices through the State attend ‘Voucher to Payment’. Available courses are listed in ELM, the CUNYfirst Learning Management System, for anyone needing a course refresher.

To Enroll
1. Enter home.cunyfirst.cuny.edu in Internet Explorer.
2. Login to CUNYfirst.
4. Navigate to: Self Service > Learning > Browse Catalog.
5. Browse to: CUNYfirst Training Program > Next > Financial Applications > Procurement and Accounts Payable > (Select the link for the Catalog Item in which you wish to enroll)
6. A page displays with available Activity Options (courses) for that Catalog Item.
7. Select the corresponding Enroll button for the preferred Activity Code.
9. A confirmation page displays confirming your enrollment and a notification is sent to your email address of record.

Serving our Students, Faculty & Staff
Managing Pop-Ups in Your Browser

In your browser, turn pop-up blockers off for CUNYfirst prior to using the system.

**Mozilla Firefox**
1. Click the Tools menu.
2. Select Options.
3. Select the Content panel.
4. Click the Exceptions button.
5. To add a website to the Exceptions list, on the Allowed Sites – Pop-ups dialogue box in the Address of web site field, enter *.cuny.edu.
6. Click the Allow button.
7. Click the Close button.
8. Click the OK button.

**Internet Explorer**
1. Click the Tools icon.
2. From the menu, select Internet options.
3. Select the Privacy tab.
4. Select the Turn on Pop-Up Blocker checkbox.
5. Select the Settings button.
6. In the field Address of website to allow, enter the url address *.cuny.edu.
7. Click the Add button.
8. Click the Add button again.
9. Click the Close button.

Questions and Answers

**Q.** What do I do when I need goods or services?
**A.** Requesters or Creators create a requisition in CUNYfirst. Requesters may obtain a quote from a potential Vendor. Requesters are not authorized to enter into a purchase commitment with any Vendor. Individuals who procure goods or services directly from vendors (confirming orders) may be liable for payment for the order. See CUNYfirst Procedure - Non-PO Purchases.

**Q.** Although I ran a Valid budget check for the Requisition, the Buyer says there are insufficient funds due to shipping costs. What should I do?
**A.** Speak to your Budget Office to ask for budget to cover the shipping costs for the Requisition. If you get a quote for goods, ask about shipping costs. Remember to include a shipping line on all requisitions. In the Additional Information box, enter comments when there are no shipping costs.

**Q.** From time to time, I am asked to create a requisition for another department. What do I do to make sure the Vendor is paid from the right budget?
**A.** In the Accounting Lines section on the Chartfields 1 and Chartfields 2 tab, overwrite the default Chartfields based on your User profile with the Chartfields for the other department.

**Q.** How are goods and services ordered for the next Budget Year?
**A.** In the Accounting Lines section on the Details tab, enter the date of 07/01/20xx where xx are the last two numbers of that Budget Year.

**Q.** What do I do with the paper documents?
**A.** Related documentation for a Requisition, Purchase Order, Receipt or Voucher may be scanned and uploaded within CUNYfirst. Send original signed receiving documents (i.e., packing slips, invoices) to Accounts Payable.

**Q.** When should an Approver enter comments?
**A.** When a Requisition is denied, then Approvers are required to enter comments about modifications to be taken or explain the denial.

**Q.** What if more items come in than were ordered?
**A.** If you intend to keep the goods, contact the Buyer for the Purchase Order. In some cases, the Buyer may adjust the Purchase Order for the quantity received. Create the receipt for the quantity received.
If you do not intend to keep the goods, contact the Buyer for the Purchase order for the return of the additional goods. Create the receipt for the ordered quantity.

**Q.** What if received items require inspection?
**A.** Within CUNYfirst, email an appropriate Category Inspector to inspect the items.
How to... Create a Requisition

Create a requisition for all goods and services.

Video available on the cuny.edu/CUNYfirst website.

Navigate to: eProcurement > Create Requisition.

Define Requisition Tab

1. In the Requisition Name field, enter a name to identify this requisition. (This is optional.)
2. For single line requisitions, click the Continue button. Alternatively, for multiple line requisitions, click the Line Defaults expand icon to enter fields to apply to every line — Vendor, Unit of Measure, Accounting Defaults and Budget Date. These common fields that apply to every line on the requisition may be overridden on the line, schedule or distribution level.
3. If the Vendor is known then in the Vendor field, enter or look up the Vendor. On the Vendor Search page, enter known search criteria and then click the Find button. Select the Vendor ID link of the correct Vendor.
4. If the Vendor is not known, leave the Vendor field blank. If you are unable to find the Vendor or to suggest an unlisted Vendor, then in the Add Items and Services stage on the Special Item section, select the Suggest New Vendor link.
5. In the Unit of Measure field, enter the correct value.
6. Click the Continue button.

Add Items and Services Tab

1. Select the Special Request tab and then click the Special Item link to enter *required fields for each line item.
2. In the Special Item section:
   In the Item Description field, enter text to characterize the item followed by a full description (i.e. dimensions, service date range) of the item.
   In the Price field, enter the amount quoted.
   In the Quantity field, enter the number of items.
   In the Unit of Measure field, enter the correct value.
3. In the Category field, enter or look up the Category number. On the Look Up Category page in the Search Categories section Search By dropdown menu, select the Description list item.
4. Select the Vendor as in Steps 3 and 4 on the Define Requisition stage. To the right of the Search By dropdown menu, enter a Search string such as COMP for a computer related request. NOTE: The wildcard (%) may be entered before or after the Search string to Find any Category containing the letters in the search string.

6. In the Additional Information field, enter any related details not yet entered. Select any or all of the checkboxes (Send to Vendor, Show at Receipt, Show at Voucher) to indicate where the entered Additional Information will be displayed.
7. Click the Add Item button. The item will display in the Requisition Summary box. As needed, add additional items.

Reviewing and Submitting Tab

1. When all line items display in the Requisition Summary box, then at the top of the page click the 3. Review and Submit link.
2. In the Requisition Lines section, select the Disclosure icon of each line to review and edit, as needed, all Item, Shipping and Chartfield details.
3. Click the Save & preview approvals button.
4. The Confirmation page displays including the Requisition ID and Approval routing. Click the Submit button.

Essential Queries

Navigate to: Reporting Tools > Query > Query Viewer. Enter your business unit and the name of the query to view it in HTML, Excel, and XML format. Download the query results in Excel, CSV Text File, or XML files. Queries may be saved as favorites.

These are common Procurement queries.

Requisition Approvers by Department:
CU_FSRQ_DEPT_APPR
College Buyers:
CU_FSP0_BUYERS
Requestors and Supervisors:
CU_FSP0_REQUESTORS
Requisition Budget Details:
CU_FSP0_REQ_BDGT
Requisition Category Approvers:
CU_FSRQ_CAT_APPR
Vendor Search by SFS#:
CU_POSFS_VNDR_SRCH
Requisition Lines Enter Search Criteria (i.e. Status:
CU_FSP0_BKR_REQ_INFO_PROMPT
POs Not Sent in 113A:
CU_POSFS_NOT_INTERFACED
SFS PO Accepts Rejects on 113B:
CU_POSFS_ACC_REJ
Voucher Not Interfaced:
CU_FSP0_NOT_INTERFACED
SFS AP Accepts Rejects on I141:
CU_FSP0_STA_ACP_REJ
State Vouchers Not Interfaced:
CU_FSP0_STA_NOT_INTERFACED
How to... Create a Receipt

Receivers must create a Receipt for all goods and services at the time the goods or services are received.

Video available on the cuny.edu/CUNYfirst website.

Prior to entering the receipt, the Receiver is required to examine the goods and services and to sign and then scan the Vendor’s packing slip to their computer’s desktop.

Additionally, inspection is required for Information Technology, Furniture, and Hazardous Materials. Receivers notify the appropriate person to conduct this inspection separately to creating this receipt.

1. Navigate to: Purchasing > Receipts > Add Update Receipts.
2. On the Add a New Value tab, enter the Business Unit on the requisition and then click the Add button.
3. On the Select Purchase Order page in the Search Criteria section’s ID field, enter the CUNY PO number shown on the Vendor’s Packing Slip and then click the Search button.
4. In the Retrieved Rows section on the Selected Rows tab, select the checkbox of the matching PO ID and Line, then click the OK button.
5. In the Receipt Qty column on the corresponding Line row, enter the number received in acceptable condition up to and not exceeding the amount requested. Note: Whenever the amount received in acceptable condition differs from the amount requested (more or less items) and/or the condition is not acceptable, then contact the Buyer in the Purchasing Department.
6. In the Recv UOM column on the corresponding Line row, enter or look up the correct value.
7. Click the Save button which also will trigger the generation of a receipt number by CUNYfirst.
8. Click the More Details tab and see if the item requires an additional Category inspection. If so, then contact the Category inspector and provide the receipt number.
9. Click the Add Comments link. In the Comments textbox, enter receipt information such as distributions, damages, shortages, and asset tag IDs. Click the Shown at Voucher checkbox.
10. In the Associated Document section, as an Attachment the name of the uploaded document displays. Note: Select the View button to ensure it is the correct document. Select the Delete button when it is not the correct document.
11. Click the OK button.
12. Click the Header Details link.
13. On the Header Details page in the Receipt Date field, today’s date displays as the default. As needed, enter the actual date of receipt or click the calendar icon to select the date. Click the OK button.

3i’s... Receivers, AP and CUNY Vendors

Have you ever ordered items and received only some of the items ordered? Have you ever been sent goods that were damaged? Those of us who receive goods, whether in Central Receiving at our college or at our desk, play a critical role in documenting that the Vendor should be paid.

People who receive goods on behalf of CUNY need to document the quantity and condition of goods received on the Receipt. In addition to creating the Receipt, notify the Purchasing Office of partial quantities and/or defective goods. In this situation, adjustments are made to our records to pay only for the number of items received in acceptable condition. Receipts also confirm when the entire Purchase Order is received as shown on the Packing Slip.

The Accounts Payable Office receives the corresponding invoice to be paid on agreed terms. A Vendor may refuse to supply any college at CUNY until such time as we pay our arrears. Paying on time is the key to CUNY maintaining our relationships with our Vendors. The process hinges on the Receiver creating a timely, complete and accurate receipt in CUNYfirst.

Key Procurement Terms

Requisition – Orders to be placed with Vendors for goods or services.

Purchase Order – Legal contract prepared in advance of the purchase to order goods or services from Vendors.

Voucher – Accounting document that is the basis for cutting checks and recording financial transactions to pay a Vendor.

Pre-encumbrance – Anticipated expense applied against a budget generated by a Requisition.

Encumbrance – Planned future expense that has been set aside in a budget generated by a Purchase Order.

Expenditures – Disbursements from a budget generated by a Voucher.

Remaining Spending Authority (RSA) – Posted budget amount less pre-encumbrances, encumbrances, and expenditures.
Help Desks

Call your help desk to open a ticket for any problems that you are having in the training environment.

Hours shown below are the Summer Hours.

BARUCH COLLEGE
Hours: Mon-Thu 8am-8pm
Fri 8am-6pm
Sat 9am-5pm
Phone: (646) 312-1010
Email: helpdesk@baruch.cuny.edu

BROOKLYN COLLEGE
Hours: Mon-Fri 9am-5pm
Phone: (718) 951-4200
Email: cunyfirst@brooklyn.cuny.edu

THE CITY COLLEGE OF NEW YORK
Hours: Mon-Thu 9am-9pm
Fri 9am-5pm
Phone: (212) 650-7878
Email: helpdesk@ccny.cuny.edu

COLLEGE OF STATEN ISLAND
July 1 - 25 Hours: Mon-Thu 8am-7pm
Fri 9am-5pm (closed Jul 12, 19, 26)
July 29 – August 9 Hours: Mon-Fri 8am-5:30pm (closed Aug 2, 9)
August 12 – August 27
Hours: Mon-Fri 9am-5pm
Phone: (718) 982-3695
Email: cunyfirsthelpdesk@csi.cuny.edu

CUNY GRADUATE CENTER
Hours: Mon-Fri 10am-6pm
Phone: (212) 817-7300
Email: helpdesk@gc.cuny.edu

CUNY GRADUATE SCHOOL OF JOURNALISM
Contact the CUNY Graduate Center help desk for assistance with CUNYfirst.

CUNY SCHOOL OF LAW
Hours: Mon-Thu 8:15am-6:30pm
Fri 8:15am-5:30pm
Phone: (718) 340-4456
Email: tech-support@law.cuny.edu

HUNTER COLLEGE
Hours: Mon-Thu 8:00am-5:30pm
Phone: (212) 772-4357
Email: helpdesk@hunter.cuny.edu

JOHN JAY COLLEGE OF CRIMINAL JUSTICE
Hours: Mon-Thu 8am-8:30pm
Phone: (212) 237-8200
Email: helpdesk@jjay.cuny.edu

LEHMAN COLLEGE
Hours: Mon-Thu 8am-10:45pm
Fri 8am-5:30pm
Sat-Sun 9am-5pm
Phone: (718) 960-1111
Email: helpdesk@lehman.cuny.edu

MEDGAR EVERS COLLEGE
Hours: Mon-Fri 9am-5pm
Phone: (718) 270-6262
Email: helpit@mec.cuny.edu

NEW YORK CITY COLLEGE OF TECHNOLOGY
Hours: Mon-Fri 8:30am-6pm
Phone: (718) 260-5626
Email: helpdesk@citytech.cuny.edu

QUEENS COLLEGE
Hours: Mon-Thu 9am-5pm
Phone: (718) 997-4444
Email: help@qc.cuny.edu

YORK COLLEGE
Hours: Mon-Thu 8am-10pm
Sat 8am-4pm
Phone: (718) 262-5300
Email: helpdesk@york.cuny.edu

CENTRAL OFFICE
Hours: Mon-Thu 8am-8pm
Fri 9am-5pm
Phone: (212) 541-0981
Email: service.desk@mail.cuny.edu

Security in CUNYfirst

If you do not have access to the components that you need to do your job:
1. Go to this Security url in your browser - security.cuny.edu
2. Select CUNYfirst Application Security.
3. Download and complete the Campus Solutions User Access Request Form <pdf>.

CUNYfirst Training
395 Hudson Street
New York, NY 10014