



Daniel Dolan
Director of Procurement
Office of Business Services

555 West 57th Street
New York City, NY 10019
T. 212.237.8900
F. 212.237.8494
ddolan@jjay.cuny.edu

To: College Community
From: Daniel Dolan
Date: October 15, 2013
Subject: CUNYfirst **Procurement User Access Form** Directions

Establishing, modifying or deleting a role in the CUNYfirst **Procurement** module is a necessary step to grant users access to purchase tax-levy (OTPS) funded goods and services. This guide will help users understand how to properly complete the CUNYfirst **Procurement User Access Request Form**.

Before you can request access to the CUNYfirst **Procurement** module, you must have first claimed claim/activated your CUNYfirst Account. If you have claimed your account you would have received your CUNYfirst Employee ID (EMPLID) and user name which typically will be your first name and last name, with a dot in-between the two names. Added to that would be the last two digits of your EMPLID. For example, John Smith would be John.Smith12.

If you have not claimed your CUNYfirst account you can do so by accessing: <http://doitapps.jjay.cuny.edu/cunyfirst/claim.php> for instructions on how to claim your CUNYfirst Account.

If you have already claimed your CUNYfirst account and are unsure as to whether or not you have access to the **Procurement** module you must sign into CUNYfirst and review the Enterprise Menu to see if you have **Financials Supply Chain** listed. If you see it listed you already have access.



If you do not see the **Financials Supply Chain** option listed you need to complete the **CUNYfirst Procurement User Access form**. First you will need to know some of the roles that can be created. Most departments should determine who the Requester(s) will be, who their Supervisor is, and the Department Level 1 and Department Level 2 Approvers.

The “basic” CUNYfirst Requisition approval process follows this order:

1. Requester creates requisition and submits;
2. Requisition will **always** be sent to Requester’s Supervisor for approval;
3. After approval it’s sent to Department Approver- Level 1 for approval;
4. After approval it’s sent to Department Approver- Level 2 for approval;
5. After approval it’s submitted to system Budget Check;
6. After Budget Check approval it is sent to Purchasing for creation of PO.

The policy at the college has been to have the Vice Presidents serve as Department Approver- Level 2 and the Department Chair/Director serve as Department Approver- Level 1. Any change to this process should be made in writing for audit purposes. Category Approvers may need to approve a requisition. Joe Laub will approve technology related purchases; Sara Cuya will approve all furniture purchases and Lindsey Kayman for Hazardous Materials.

Everyone that has access to CUNYfirst Procurement is required to have their Supervisor’s Name and Employee ID created as part of their profile. When a Requester creates and submits a requisition it will always go to their Supervisor for approval first. Once the Supervisor approves the requisition it will then go to the Department Approver- Level 1 and then Department Approver- Level 2 for the indicated department.

CUNYfirst does have an option where you can designate someone to create requisitions on behalf of someone else. This person would be a CREATOR and the people they can create requisitions for would need to be identified in CUNYfirst. In this case the user would be a Creator as opposed to a Requester.

The CUNYfirst Procurement User Access Request Form is located at the CUNY Computer & Information Services website. The url is listed below or you can Google: CUNYfirst Application Security. These directions should be followed when using Mozilla Firefox as the browser.

<http://www.cuny.edu/about/administration/offices/CIS/security/cunyfirst.html>

1. Under the CUNYFIRST APPLICATION SECURITY heading, click on “Procurement Access Form <pdf>” and the form should appear.
2. Then click on the download icon in the top right-hand corner (a page with an arrow pointing down)
3. Open with Adobe Acrobat (default)
4. Complete form, save, print and have signed with all required signatures.

5. Scan document to Dan Dolan at ddolan@jjay.cuny.edu or fax to 212-237-8922
6. It will be reviewed for accuracy and submitted to the college Agency Security Liaison (ASL) in the Department of Information Technology.
7. You will be notified when it has been completed.

If using Internet Explorer go to same url:

<http://www.cuny.edu/about/administration/offices/CIS/security/cunyfirst.html>

1. Click on "CUNYfirst Application Security – Computer& Information Services..."
2. Under the CUNYFIRST APPLICATION SECURITY heading, click on "Procurement Access Form <pdf>" and the form should appear.
3. Complete form, save, print and have signed with all required signatures. To save, click on the save icon in the top left hand corner (looks like a floppy disk).
5. Scan document to Dan Dolan at ddolan@jjay.cuny.edu or fax to 212-237-8922
6. It will be reviewed for accuracy and submitted to the college Agency Security Liaison (ASL) in the Department of Information Technology.
7. You will be notified when it has been completed.

TO COMPLETE THE CUNYFIRST PROCUREMENT ACCESS FORM

Regardless of your role you will have to complete the top section "**Employee Information Section.**" CUNY requires ALL fields be completed. This information must be accurate otherwise your request cannot be processed. The only **Procurement Roles** available to the college departments are the following:

Requester:

If the user will create requisitions under his own name, he is a requester. A Requester is defined by CUNY as the person who is responsible and accountable for the purchase.

- On page 1 of the CUNYfirst Access Request Form under Procurement Roles please check "Add" next to the Role Description "Requester."
- On page 2, fill out all 13 fields under section 1 of "Additional Information for Specific Roles." You must enter the Supervisors Employee ID and name, the Loading Dock Location will always be **NB-L2.65** and the GL Business Unity will always be **JJC01**. The last seven items needed to be completed can be found on **John Jay College's Department Code Crosswalk** (request a copy form the college Budget Office).

Creator:

If the user will be creating requisitions on behalf of a Requester he is a Creator. Be aware that the Supervisor's approval needed will not be that of the Creator but that of the Requester (the person for whom the Creator is creating the requisition).

- On page 1 under Procurement Roles please check "Add" next to the Role Description Creator."

- On page 2 under section 2 “For Creator (To be verified by Requestors Supervisors/Department Heads) enter the Employee ID for every requester that the Creator will be creating requisitions for under the column “Authorized for Requesters’ Employee ID”. In the column next to it (column heading: Authorized for Requesters’ Employee ID and Name) enter the Requesters’ ID again and the Requesters’ name.

Requester’s Supervisor:

The Requesters’ Supervisor is responsible for the first in a series of approvals for new requisitions. ALL supervisors of procurement requesters must have this role assigned.

- On page 1 select Requester’s Supervisor.

Departmental Approver:

Defined by CUNY as approving requisitions and validating budget availability and priorities. (IF your department wants multiple layers of approvals, one form will have to be completed for each individual approver). Each Approver will receive e-mail notification that there is a requisition that needs to be approved.

- On page 1 under Procurement Roles please check “Add” next to the Role Description “Department Approver - Level 1” or “Department Approver - Level 2”.

- On page 2 under section 3 of “Additional Information for Specific Procurement Roles” complete the “Approver Employee ID” and “CUNYfirst Department ID” number. If you are unsure of the Department ID code please contact Dan Dolan at x 8900.

All the Roles below Department Approver - Level 2 are specific to certain departments (DOIT, Space Planning, Public Safety, Campus Office Services and the Business Office). If you think you need access to these roles please contact Dan Dolan.

PRIMARY PERMISSION LIST and ROW LEVEL SECURITY IS REQUIRED (NORMAL HANDLING)

On page #3 only check the appropriate box in the “Primary Permission List and Row Level Security is Required (Normal Handling). You will most likely only check off the Procurement Only box but if you think that you may need to process Student Refunds then check the appropriate box. All the other boxes on that page and page 4 are for Central Office and the college Business Office purposes only. Please ignore them.

APPROVALS AND SPECIAL CONSIDERATIONS (Page 5)

For Employee:

- Enter employee name

Managerial Request:

- The requesting Department Chair or Director must sign the form.

Special Considerations or Comments Box

- Indicate any information that may help clarify what you want done. For example, you may wish to modify a default department for an existing Requestor. Since the form only allows you to ADD or REMOVE, you would put an X in the Add box and explain in the comments section that you are modifying an existing Requestor.

SUBMITTING THE FORM

Once you have signed the form please submit to Dan Dolan at ddolan@jjay.cuny.edu or fax to 212-237-8922. Once reviewed for accuracy it will be forwarded to the Business Manager or Senior Vice President Pignatello for Approval. Once the form is approved it will then be submitted to the Department of Information Technology for input into the CUNYfirst System.

If you have any questions please call me at x8900 or e-mail me at ddolan@jjay.cuny.edu.

c/CUNYfirstaccessform09252013.docx