

***CUNY  
e-PROCUREMENT SYSTEM  
(EPS)***

***USER MANUAL***

***May 7, 2008***

# **CUNY e-PROCUREMENT SYSTEM (EPS)**

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# ***CUNY e-PROCUREMENT SYSTEM (EPS)***

## ***1.0 INTRODUCTION***

### **1.1 EPS SYSTEM OVERVIEW**

The e-Procurement System (EPS) is intended to automate and standardize the Requisition/Purchase Order process within CUNY. The system supports the following: Requesting goods and/or services; approving the request; generating and assigning Purchase Order; and tracking the receipt of the goods/services. Payment procedures are currently outside the scope of the EPS system.

### **1.2 DOCUMENT OBJECTIVE**

This manual provides a user guide for user/system interactions performed by the varying levels of college personnel involved in ordering goods and services.

#### ***WHAT IS COVERED***

Written for an “end user” audience, this user guide:

- a. Describes the process flow of Requisition / purchase order and defines the responsibilities of functional execution within them.
- b. Defines step-by-step procedures for keeping track of the status and completion of Requisition / purchase order.
- c. Identifies the screens accessed at each level and provides instructions for their completion and/or correction (as appropriate).

#### ***WHAT IS NOT COVERED***

This document does not provide system level specifications. For example, it does not:

- a. Define detail edits or itemized program steps within the EPS system process.
- b. Provide database type information or record layouts for the files used within processing.
- c. Provide system configuration or detail technical specifications.

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### **1.3 DOCUMENT OUTLINE**

The e-Procurement System (EPS) User Guide presents chapters comprised of screen displays and step-by-step completion instructions for:

- Setting up the computer and defining user roles within EPS.
- Functions involved in Purchase Order generation, including:
  - Creating a Requisition.
  - Submitting a Requisition for approval.
  - Approving a Requisition.
  - Submitting a Requisition for encumbrance in FAS.
  - Assigning a Requisition to a buyer.
  - Creating an Invitation To Bid (ITB).
  - Generating the PO (Purchase Order, Contract, Direct Pay).
  - Completing the PO.
  - Submitting the PO for encumbrance in FAS.
  - Entering merchandise received into a Receiving Report.
  - Tracking the PO.
- Administrative functions, such as maintaining information used within the system that includes Ship To Addresses, Department Profiles, Group Members, and User Profiles.

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## **2.0 SET UP FUNCTIONS**

### **2.1 GETTING YOUR COMPUTER READY FOR EPS**

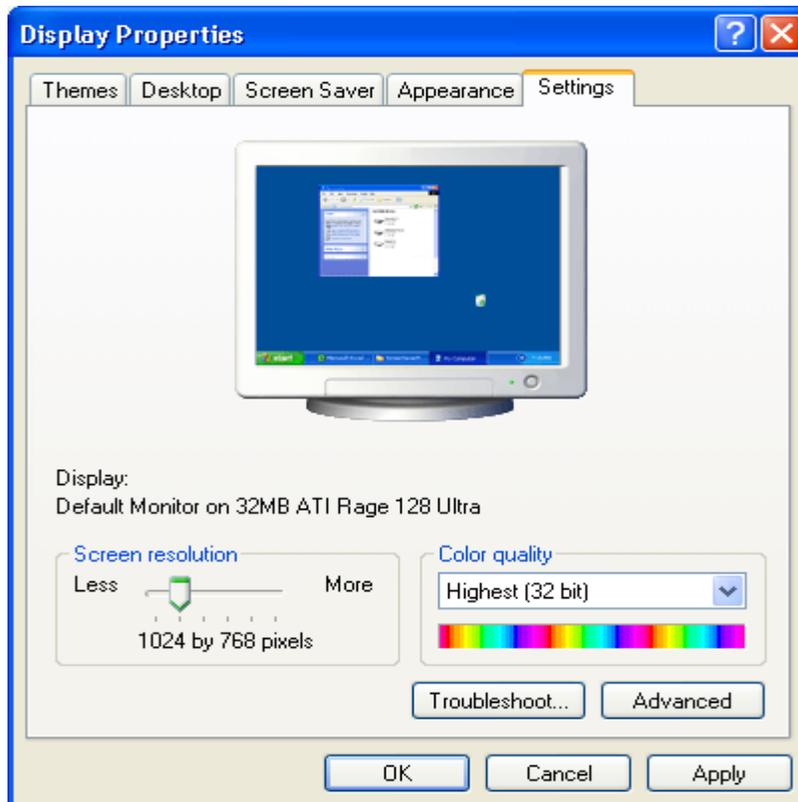
EPS supports the following browsers:

- Microsoft Internet Explorer
- Mozilla Firefox
- Netscape Navigator

It is recommended that you have the latest browser version on your PC.

### **2.2 SUGGESTED SCREEN RESOLUTION**

In order to maximize the information presented on the screen and minimize scrolling, it is highly recommended that the screen be set for high resolution. At minimum, it is recommended that a resolution of 1024 x 768 be utilized.



On a **PC**, the screen resolution can be set as follows:

1. Click Start
2. Click Settings
3. Click on Control Panel

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4. Double click "Display"
5. Click the "Settings" tab
6. Move the slide control on the **Screen Resolution** left or right to achieve the higher resolution recommended - 1024 x 768
7. Click the "Apply" button
8. Click the "OK" button

### **2.3 HELPFUL HINTS**

Following are some suggestions for using EPS as efficiently as possible:

- Have the latest browser version.
- Allow pop-up windows in your browser.
- Have the latest Adobe Reader installed.
- Do not use the browser's forward and backward buttons to navigate EPS - always use the navigation buttons and links within EPS.
- Do not refresh your screen while entering data - you will lose information that you are entering.
- After one hour of inactivity, your session will expire and you will be logged off from the system.
- EPS operates within the protection of SSL (Security Socket Layer) - a security protocol that protects your system from unauthorized access. While using EPS you may be prompted with the following: "Do you want to display non secured items?" – Click "OK" to continue or "NO" to terminate the session.

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### ***3.0 USER ROLES DEFINITION***

There are different user roles in EPS. The role determines what the user is permitted to perform and the information they are authorized to access for viewing or editing.

Everyone who has access to EPS can complete a Requisition, and therefore perform the functions of a requester. However, once the Requisition is completed, it is directed to the specified level for approval depending on the user's designated role.

The following table describes the roles and their function:

<b><i>ROLE</i></b>	<b><i>FUNCTION / EDIT ACCESS</i></b>
REQUESTER	<ul style="list-style-type: none"> <li>• Create Requisition.</li> <li>• Save as draft or submit to Approver 1 in Pending Approval 1 Status (or to higher approval level if requester is also an approver).</li> <li>• Attach Requisition justification and any other required documents.</li> <li>• Modify draft or rejected Requisitions.</li> <li>• Delete draft or rejected Requisitions.</li> <li>• Create new Requisition from closed or cancelled Req.</li> </ul>
APPROVER 1	<ul style="list-style-type: none"> <li>• Verify Requisition information.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Approve submitted Requisitions.</li> <li>• Submit new Requisitions to Approver 2 in Pending Approval 2 status.</li> </ul>
ALTERNATE 1	<ul style="list-style-type: none"> <li>• Verify Requisition information.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Approve submitted Requisitions.</li> <li>• Submit approved Requisitions to Approver 2 in Pending Approval 2 status.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
APPROVER 2	<ul style="list-style-type: none"> <li>• Verify Requisition information.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Submit approved non-technology Requisitions to Approver 3 in Pending Approval 3 status.</li> <li>• Submit approved technology Requisitions to Tech Approvers.</li> <li>• Submit new Requisitions to Approver 3 in Pending Approval 3 status.</li> </ul>

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<b><i>ROLE</i></b>	<b><i>FUNCTION / EDIT ACCESS</i></b>
ALTERNATE 2	<ul style="list-style-type: none"> <li>• Verify Requisition information.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Submit approved non-technology Requisitions to Approver 3 in Pending Approval 3 status.</li> <li>• Submit approved technology Requisitions to Tech Approvers.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
TECH APPROVER	<ul style="list-style-type: none"> <li>• Verify Requisition information for technology items.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Submit approved Requisitions to Approver 3 in Pending Approval 3 status.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
APPROVER 3	<ul style="list-style-type: none"> <li>• Verify Requisition information.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Charge Requisition to another department.</li> <li>• Select a Purchasing Group to process Requisition.</li> <li>• Approve submitted Requisitions for FAS encumbrance.</li> <li>• Successful encumbrance moves the Requisition to the Pending PO status.</li> <li>• Unsuccessful encumbrance results in a Requisition with Rejected, FAS Conflict, or Insufficient Funds status.</li> <li>• New Requisitions are submitted for FAS encumbrance and moved to the Pending PO status.</li> </ul>
ALTERNATE 3	<ul style="list-style-type: none"> <li>• Verify Requisition information.</li> <li>• Modify or reject a Requisition before approval.</li> <li>• Charge Requisition to another department.</li> <li>• Select a Purchasing Group to process Requisition.</li> <li>• Approve submitted Requisitions for FAS encumbrance.</li> <li>• Successful encumbrance moves the Requisition to the Pending PO status.</li> <li>• Unsuccessful encumbrance results in a Requisition with Rejected, FAS Conflict, or Insufficient Funds status.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>

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<b><i>ROLE</i></b>	<b><i>FUNCTION / EDIT ACCESS</i></b>
PURCHASING DIRECTOR (or Designee)	<ul style="list-style-type: none"> <li>• Assign Pending PO Req to staff member (buyer). The Requisition status moves to Assigned.</li> <li>• Select a Pending PO Req's Processing Option and Method of Procurement.</li> <li>• Reassign an Assigned Requisition to another buyer.</li> <li>• Cancel a Pending PO or Assigned Req in both EPS and FAS.</li> <li>• Transfer a Pending PO Req to another Purchasing dept.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
BUYER (Purchasing Group)	<ul style="list-style-type: none"> <li>• Perform bidding procedure by creating an Invitation To Bid (ITB) from an Assigned Requisition.</li> <li>• Change an Assigned Req's Processing Option and Method of Procurement (used when creating a draft PO).</li> <li>• Cancel an Assigned Requisition in both EPS and FAS.</li> <li>• Create a PO draft from an Assigned Requisition.</li> <li>• Change a PO draft's Processing Option and Method of Procurement.</li> <li>• Submit PO draft to FAS (Purchase Order #s are automatically generated). EPS changes Requisition status to "Closed" and the Requisition encumbrance is liquidated in FAS.</li> <li>• Increase, decrease, or cancel a submitted PO.</li> <li>• Change PO information after it has been submitted.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
ACCOUNTS PAYABLE	<ul style="list-style-type: none"> <li>• View Closed and Cancelled Requisitions.</li> <li>• View Submitted and Cancelled POs.</li> <li>• Change expense code and add comments in POs with a Submitted status.</li> <li>• View Receiving Reports.</li> <li>• Add comments in Receiving Reports.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
FIXED ASSETS	<ul style="list-style-type: none"> <li>• View fixed asset POs with a Submitted status.</li> <li>• Add comments to fixed asset POs.</li> <li>• View Receiving Reports for fixed asset POs.</li> </ul>
CENTRAL RECEIVING	<ul style="list-style-type: none"> <li>• View Submitted and Cancelled POs that have Receiving Reports.</li> <li>• Enter merchandise received into Receiving Reports.</li> </ul>

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<b><i>ROLE</i></b>	<b><i>FUNCTION / EDIT ACCESS</i></b>
SUPER USER (College Admin.)	<ul style="list-style-type: none"> <li>• View and edit access to all Procurement data (Requisitions, ITBs, POs, Receiving Reports) for a college.</li> <li>• Can do all the transactions listed above for a college.</li> <li>• Can perform administrative tasks:               <ul style="list-style-type: none"> <li>- Add, edit, and delete “ship to” addresses</li> <li>- Add and edit department information</li> <li>- Add, edit, and delete user profiles</li> <li>- Add, edit, and delete approval roles for departments</li> <li>- Add and delete members from college groups</li> </ul> </li> <li>• Add and remove system messages.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
E-PROC DATA ADMINISTRATOR (Data Admin.)	<ul style="list-style-type: none"> <li>• View and edit access to all Procurement data (Requisitions, ITBs, POs, Receiving Reports) for all colleges.</li> <li>• Can do all the transactions listed above for all colleges.</li> <li>• EPS deployment activities, including setting up colleges, departments, and user profiles.</li> <li>• Maintain information for ledgers, expense codes, and commodity codes.</li> <li>• Submit new Requisitions to Approver 1 in Pending Approval 1 status.</li> </ul>
<b><i>SYSTEM ADMINISTRATIVE ROLES:</i></b>	
EPS SYSTEM ADMINISTRATOR	<ul style="list-style-type: none"> <li>• Edit access to all system configuration information.</li> <li>• Set up initial system information.</li> <li>• Does not have access to Procurement data.</li> </ul>
DOMINO ADMINISTRATOR	<ul style="list-style-type: none"> <li>• Maintains all usernames, e-mail addresses, passwords, and groups in the Domino Directory (NAB) and monitors Domino server related transactions.</li> <li>• Run agents as part of the initial application setup or upon system design changes.</li> </ul>

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## *4.0 GETTING INTO EPS*

### **4.1 LOGGING INTO THE SYSTEM**

To access the e-Procurement System (EPS) you must sign on to the Website where EPS resides, as follows:

1. Open a desired browser and enter this URL: <https://ebusiness.cuny.edu>  
The system will display the Log in screen.

Tuesday, April 29, 2008

**WE ARE NY** **CUNY** The City University of New York **ebusiness.cuny.edu**

### Server Login

Please enter your Username and Password.

Username:

Password:

[Forgot Your Password?](#)

INVEST IN **CUNY**

2. Enter your name in **Username** and your **Password**.
3. Hit Enter or click the Login button.
4. If you have forgotten your password, click on the “Forgot Your Password?” link and enter your username. Your new password will be emailed to you.

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## 5.0 e-PROCUREMENT PROCESSING

### 5.1 e-PROCUREMENT ACCESS

The screenshot displays the CUNY e-Procurement system interface. On the left is a navigation menu with categories like HELP, REQUISITIONS, and PURCHASE ORDERS. The main content area is titled "Requisitions By Status Pending Approval 1". It features two dropdown menus: "Select College: University Management & Programs (24)" and "Select Requisition Status: Pending Approval 1". A "Search" button is located below the status dropdown. The central part of the screen contains a table of requisitions with columns for Dept, Date, Req #, Requester, FAS Desc, and Total. The table lists various departments such as CENTRAL OFFICE ADMINISTRATION, COLLABORATIVE PROGRAMS, and INSTITUTIONAL RESEARCH, along with their respective dates, requisition numbers, requesters, descriptions, and total amounts.

Dept	Date	Req #	Requester	FAS Desc	Total
CENTRAL OFFICE ADMINISTRATION (2-121-00)	03/27/2008	<a href="#">1218020</a>	Tamma Jones	EPS-Mac - Retail B	\$1,537.95
COLLABORATIVE PROGRAMS (2-302-00)	04/25/2008	<a href="#">3028155</a>	Gary Dine	EPS-Stuart Cochran	\$155.00
COLLABORATIVE PROGRAMS (2-302-00)	04/25/2008	<a href="#">3028154</a>	Gary Dine	EPS-Education Week	\$39.00
COLLABORATIVE PROGRAMS (2-302-00)	04/25/2008	<a href="#">3028153</a>	Gary Dine	EPS-The Chronicle	\$82.50
COMMUNICATIONS . (2-018-00)	09/13/2007	<a href="#">0188006</a>	Rookmeeni Singh	EPS-Fluke network	\$30,200.00
IFR-UAPC (3-293-20)	04/21/2008	<a href="#">2938122</a>	Rose Machaal	EPS-Graphic Paper	\$1,164.40
IFR-UAPC (3-293-20)	04/18/2008	<a href="#">2938120</a>	Zina Yakubova	EPS-Educational Ma	\$268.20
IFR-UAPC (3-293-20)	04/17/2008	<a href="#">2938119</a>	Zina Yakubova	EPS-Mobile Hearing	\$1,200.00
IFR-UAPC (3-293-20)	04/17/2008	<a href="#">2938118</a>	Zina Yakubova	EPS-Blood Pressure	\$4,284.00
IFR-UAPC (3-293-20)	02/07/2008	<a href="#">2938121</a>	Zina Yakubova	EPS-Massage Therap	\$600.00
INSTITUTIONAL RESEARCH (2-280-00)	04/24/2008	<a href="#">2808060</a>	Anita Yee	EPS-Deposit of cas	\$245.00
INSTITUTIONAL RESEARCH (2-280-00)	04/22/2008	<a href="#">2808059</a>	Anita Yee	EPS-Computers for	\$1,128.00
INVEST IN CUNY (2-192-00)	03/31/2008	<a href="#">1928038</a>	Yvonne Sotomayor	EPS-To be distribu	\$2,347.50
LIBRARY SERVICES. (2-043-00)	04/22/2008	<a href="#">0438083</a>	Larry McCue	EPS-Ithaka Harbors	\$21,364.50
MOTOR VEHICLE OPERATIONS. (2-288-00)	02/19/2008	<a href="#">2888026</a>	Rudy Hurdle	EPS-2008 Jeep Gran	\$21,704.52
OFFICE OF THE CHANCELLOR (2-198-00)	04/24/2008	<a href="#">1988039</a>	Julia Borick	EPS-executive brea	\$235.00
OFFICE OF THE EXECUTIVE VC (2-374-00)	04/24/2008	<a href="#">3748106</a>	Zhanna Kushmakova	EPS-Dr. Charles Sc	\$5,750.00
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	04/18/2008	<a href="#">1148087</a>	Elaine Mazvck	EPS-Wordperfect Of	\$648.60

### CHANGING YOUR PASSWORD

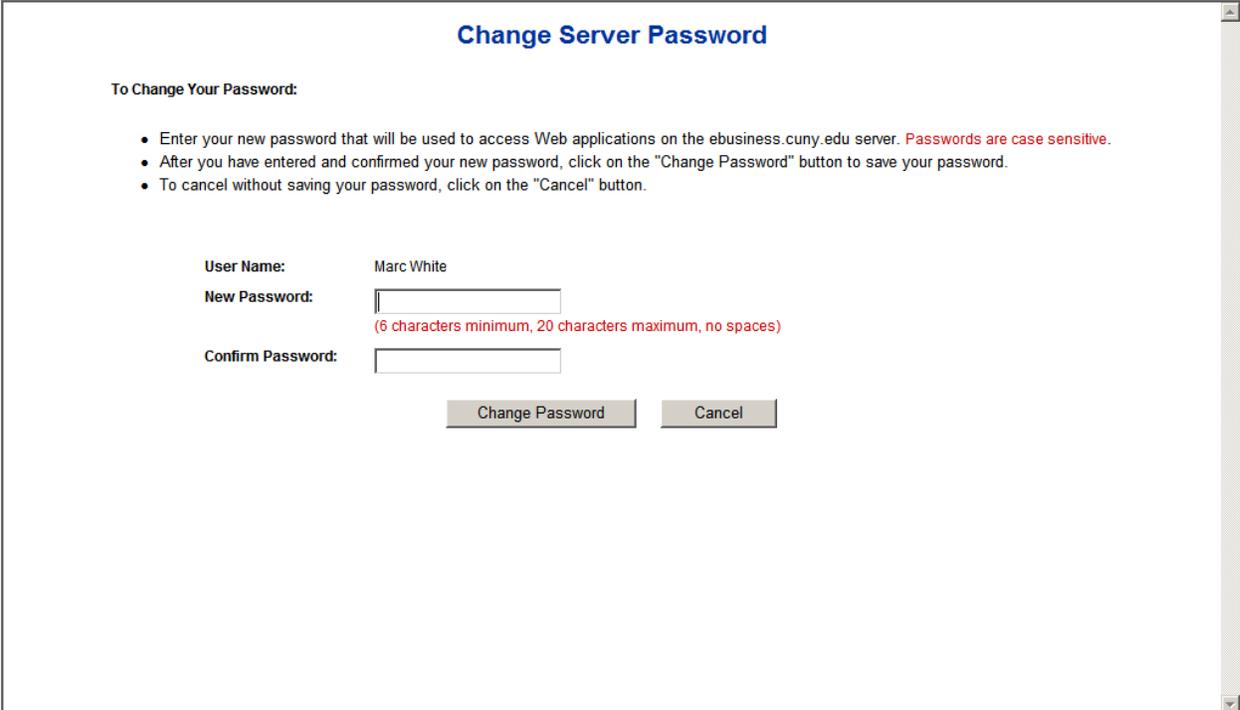
1. When you click “**Password**”, the following “**Change Password**” confirmation pop-up window is displayed.



2. Click the “**OK**” button to proceed. You will be returned to the initial Log in screen. Click the “**Cancel**” button if you decide not to change your password. The confirmation prompt will disappear.

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3. Log in again entering your name and old password (this ensures that another person is not trying to change your password).
4. Once logged in, the system displays the “**Change Password**” screen.

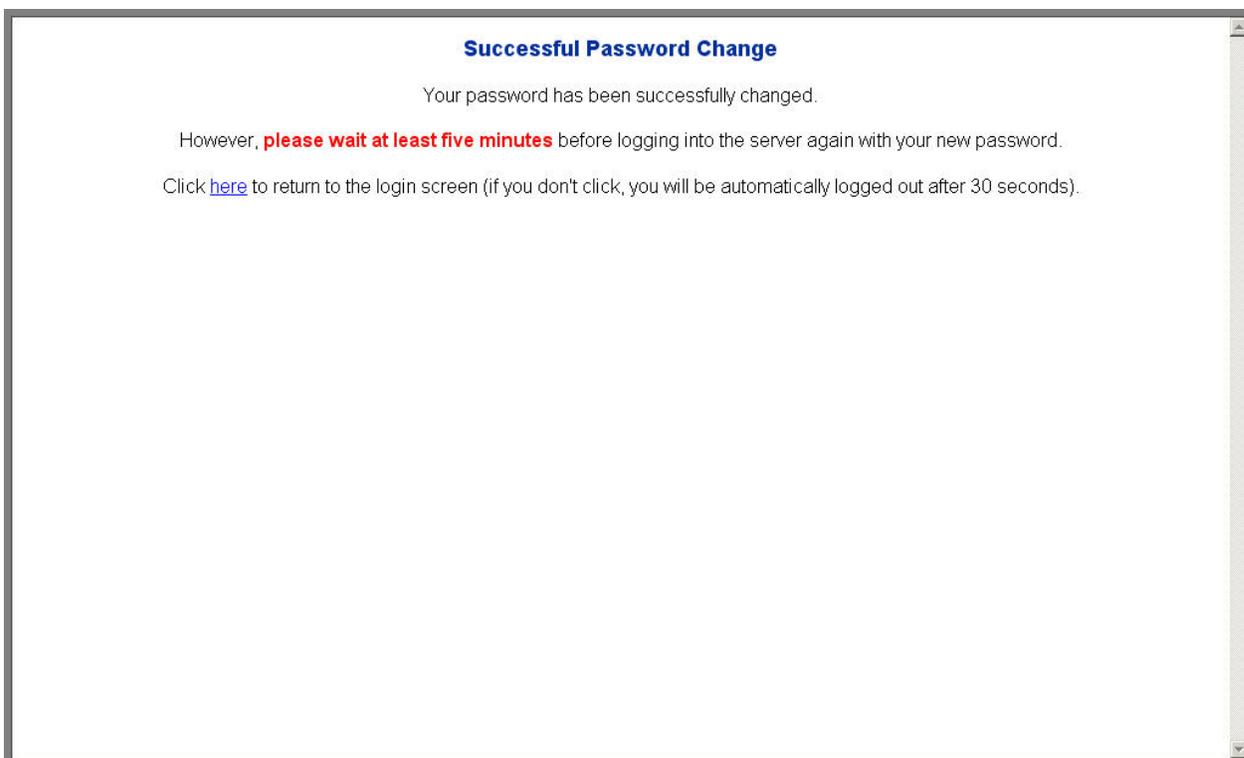


The screenshot shows a web browser window with the title "Change Server Password". The page content includes the following elements:

- Change Server Password** (Section Header)
- To Change Your Password:**
  - Enter your new password that will be used to access Web applications on the ebusiness.cuny.edu server. *Passwords are case sensitive.*
  - After you have entered and confirmed your new password, click on the "Change Password" button to save your password.
  - To cancel without saving your password, click on the "Cancel" button.
- User Name:** Marc White
- New Password:** [Text Input Field]  
*(6 characters minimum, 20 characters maximum, no spaces)*
- Confirm Password:** [Text Input Field]
- Change Password** (Button)
- Cancel** (Button)

5. Following the instructions on the screen, enter your new password in the “**New Password**” field, and enter it again in the “**Confirm Password**” field.
6. Click “**Cancel**” if you do not wish to change your password. The system returns to the log in screen where you must log in with your old password.
7. Click “**Change Password**” to apply your changes. The system displays the “**Successful Password Change**” screen, instructing you that you must wait at least five minutes and then log in using your new password.

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If after waiting at least five (5) minutes you have problems logging in with your new password, contact the EPS System Administrator.

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### **5.1.1 SIDEBAR OPTIONS**

The Sidebar presents the sections and options available to the logged on user for continued processing within the e-Procurement system. The available sections and options depend on the user's designated EPS role. The table below describes options under each section and defines which roles have access authority.

<b><i>OPTION</i></b>	<b><i>DEFINITION</i></b>	<b><i>ACCESS</i></b>
<b>Password</b>	Allows the user to change their password.	All Roles
<b>Logout</b>	Returns the user to the Login screen. If entered data was not saved, it is lost.	All Roles
<b>Create Requisition</b>	Allows the user to create a Requisition. If the user can create Requisitions for more than one department, a department must be selected first before a Requisition can be created.	All Roles
<b>HELP SECTION</b>		
<b>FAQs about Procurement</b>	Frequently asked questions about how to buy goods and services. The file is in PDF format.	All Roles
<b>About EPS: EPS Enhancements</b>	A list of changes to the e-Procurement system. The file is in PDF format.	All Roles
<b>About EPS: EPS User Guide</b>	This document, in PDF format.	All Roles
<b>REQUISITIONS SECTION</b>		
<b>Search For Requisitions</b>	This allows you to enter criteria for finding Requisitions and displays the search results.	All Roles
<b>Assigned to Me</b>	If you are a buyer in a Purchasing Department, this displays all Requisitions assigned to you, sorted by Dept, Date assigned, or Charged to P/T card.	Purchasing Dept Buyer
<b>Created By Me</b>	Displays a list of all Requisitions you have created, sorted by Department, Requisition status, Date created.	All Roles
<b>Require My Approval</b>	If you are an approver, this displays a list of all Requisitions Pending Approval at your level, sorted by Requisition status, Department, Requisition date.	Approvers / Alternates 1, 2, 3
<b>Require Tech Approval</b>	If you are a technology approver, this displays a list of all Requisitions Pending Approval at your level, sorted by Department, Requisition date.	Technology Approvers
<b>By Status</b>	Displays a list of all Requisitions filtered by Requisition Status, sorted by Department, Date created.	All Roles
<b>For Purchasing Group: By Status</b>	Displays a list of encumbered, closed, and cancelled Requisitions sorted by Requisition status, Encumbered date, Requisition number.	Purchasing Dept

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<b><i>OPTION</i></b>	<b><i>DEFINITION</i></b>	<b><i>ACCESS</i></b>
<b>For Purchasing Group: Pending PO</b>	Displays a list of all Requisitions Pending PO sorted by Encumbered date, Requisition number.	Purchasing Dept
<b>Other Req Lists: By Department</b>	Displays a list of all Requisitions filtered by Department and sorted by Requisition Status, Date created.	All Roles
<b>Other Req Lists: By Req Number</b>	Displays a list of all Requisitions sorted by Requisition number, Requester, Date created.	All Roles
<b>Other Req Lists: By Vendor</b>	Displays a list of all Requisitions sorted by Vendor name, Requisition number.	All Roles
<b>Closed / Cancelled After 90 Days (Archived)</b>	Requisitions that have been closed or cancelled are automatically archived after 90 days. This option allows viewing of the archived Requisitions, sorted by Requisition number.	All Roles
<b>BID INVITATIONS SECTION</b>		
<b>Search For ITBs</b>	This allows you to enter criteria for finding Invitation To Bids (ITBs) and displays the search results.	Purchasing Dept
<b>By Bid Number</b>	Displays a list of all ITBs, sorted by Bid number.	Purchasing Dept
<b>PURCHASE ORDERS SECTION</b>		
<b>Search For POs</b>	This allows you to enter criteria for finding Purchase Orders, Contracts, and Direct Pays (POs), and displays the search results.	All Roles
<b>Assigned To Me</b>	If you are a buyer in a Purchasing dept, this displays all POs that have been assigned to you, sorted by Department, PO date, PO number.	Purchasing Dept Buyer
<b>By Status</b>	Displays a list of all POs sorted by Status, Department, Date created.	All Roles
<b>With Attached Invoice</b>	Displays a list of all POs with attached invoices, sorted by PO number.	Purchasing Dept, Accts Payable Dept
<b>For Accounts Payable</b>	Displays a list of all encumbered and cancelled POs, sorted by PO status, PO number.	Accounts Payable Dept
<b>Other PO Lists: By Department</b>	Displays a list of all POs filtered by Department, sorted by PO Status, PO Date.	All Roles
<b>Other PO Lists: By PO Number</b>	Displays a list of all POs sorted by PO Number, Requisition number.	All Roles
<b>Other PO Lists: By Vendor</b>	Displays a list of all POs sorted by Vendor name, PO number.	All Roles

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<b><i>OPTION</i></b>	<b><i>DEFINITION</i></b>	<b><i>ACCESS</i></b>
<b>Other PO Lists: By Encumbered Date</b>	Displays a list of all POs sorted by Encumbered date, PO number.	All Roles
<b>Older Than Two Fiscal Years (Archived)</b>	POs older than two fiscal years are automatically archived. This option allows viewing of the archived POs, sorted by PO number.	All Roles
<b>FIXED ASSESTS SECTION</b>		
<b>Search For Fixed Assets</b>	This allows you to enter criteria for finding POs for fixed assets, and displays the search results.	Fixed Asset Dept
<b>By Expense Code</b>	Displays a list of POs for fixed assets sorted by Expense code, PO number.	Fixed Asset Dept
<b>By PO Number</b>	Displays a list of POs for fixed assets sorted by PO Number.	Fixed Asset Dept
<b>RECEIVING REPORTS SECTION</b>		
<b>Search For Receiving Rpts</b>	This allows you to enter criteria for finding Receiving Reports, and displays the search results.	All Roles
<b>All By PO Number</b>	Displays a list of all Receiving Reports sorted by PO number.	All Roles
<b>Other Receiving Report Lists: Open Receiving Rpts</b>	Displays a list of Receiving Reports that are awaiting receipt of merchandise, sorted by PO number.	All Roles
<b>Other Receiving Report Lists: Closed Receiving Rpts</b>	Displays a list of Receiving Reports that have received all merchandise, sorted by PO number.	All Roles
<b>Older Than Two Fiscal Years (Archived)</b>	Receiving Reports older than two fiscal years are automatically archived. This option allows viewing of the archived Receiving Reports, sorted by PO number.	All Roles
<b>USER PROFILE SECTION</b>		
<b>My Profile</b>	This allows you to edit your user profile information.	All Roles
<b>MESSAGE BOARD SECTION</b>		
<b>View Messages</b>	Displays college specific or system wide messages.	All Roles
<b>FORUM SECTION</b>		
<b>View Forum</b>	Displays college specific discussion forum entries.	All Roles

**CUNY e-PROCUREMENT SYSTEM (EPS)**

<b><i>OPTION</i></b>	<b><i>DEFINITION</i></b>	<b><i>ACCESS</i></b>
<b>ADMINISTRATION SECTION</b>		
<b>Ship to Addresses</b>	Displays a list of all Ship To addresses for each college. Ship To addresses can be created, modified, or deleted.	Super User & Data Admin.
<b>Department Profiles</b>	Displays a list of all Department Profiles within each College, sorted by College and Department name. Department Profiles can be created, modified, or deleted.	Super User & Data Admin.
<b>Group Members</b>	Displays usernames belonging to different groups within a college (Purchasing group, Accounts Payable group, Fixed Asset group, Central Receiving group, Technology Approver group). Usernames can be added or deleted to/from groups.	Super User & Data Admin.
<b>User Profiles</b>	Displays a list of User Profiles sorted by Last Name/First Name. User Profiles can be created, modified, and deleted. Deleting a User Profile automatically removes the user's entry from the Notes Directory (removing access to the e-business server).	Super User & Data Admin.

## ***CUNY e-PROCUREMENT SYSTEM (EPS)***

### ***5.1.2 REQUISITION STATUS DEFINITION***

The following describes the status that a Requisition can have as it moves through its life-cycle:

<b><i>STATUS</i></b>	<b><i>DEFINITION</i></b>
Draft	The Requisition is a work in progress. Requester is still editing the Requisition draft.
Pending Approval 1	The Requisition has been submitted to the first approver. Approver 1 or Alternate 1 must approve or reject it.
Pending Approval 2	The Requisition has been approved at the first level and has been submitted to the second approver. Approver 2 or Alternate 2 must approve or reject it.
Pending Tech Approval	The Requisition contains technology related items and must be approved by a technology approver before going to budget (approver 3).
Pending Approval 3	The Requisition has been approved at the second level or by a tech approver, and has been submitted to the third approver (budget). Approver 3 or Alternate 3 must approve or reject it.
Pending PO	The Requisition has been approved at the third level and has been encumbered in FAS. The Purchasing Director will then assign the order to a Buyer.
Assigned	The Requisition has been assigned to a Buyer.
Closed	The Requisition has been automatically closed as the Buyer turned the Assigned Requisition into a Draft Purchase Order. The Requester can create a new Requisition based on this closed Requisition.
Rejected	The Requisition has been rejected at the Approver 1, 2 or 3 level. The Requester can now permanently delete the Requisition or edit and resubmit it for approval.
Insufficient Funds	FAS has rejected the “post up” of the approved Requisition for reasons of insufficient funds. Funds need to be allocated for it to proceed. Once resolved, the Requisition can be re-submitted to FAS for encumbrance.
FAS Conflict	FAS has rejected the “post up” of the approved Requisition for reasons other than Insufficient Funds. The inconsistency must be corrected, and the Requisition re-submitted to FAS.
Cancelled in FAS	The Requisition has been cancelled in FAS. The Requester can create a new Requisition based on this cancelled Requisition.

## 5.2 CREATING A REQUISITION

From the sidebar, click the “Create Requisition” button.

If you have permission to create Requisitions for more than one department, then you would need to select a department. To select a department:

1. Click the “Select Dept” button (next to Code). A list of departments that you have permission to create Requisitions for is displayed in alphabetical order.
2. Click on the department name. The rest of the information would be completed for you.
3. Click the OK button.

The screenshot shows the 'Create Requisition' interface. On the left is a sidebar with the CUNY logo and navigation menu. The main content area has a yellow background and is titled 'Create Requisition'. Below the title is a section 'Select a Department for the Requisition:' with the instruction: 'Click on the "Select Dept" button to display a list of departments to select from'. The form includes the following fields and buttons:

- College Name: University Management & Programs (24)
- Department Name:
- Code:
- Funding Source:
- Ledger:
- Program Code:
- Buttons:

If you only have permission to create Requisitions for one department, then you would see the Draft Requisition displayed with department information already entered.

## CUNY e-PROCUREMENT SYSTEM (EPS)

**University Management & Programs Requisition**

Fields marked with \* are required

Req Date: 04/25/2008 Fiscal Year: 08

**Requester Information**

College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Room #: N/A Office Location: 230 West 41st St.  
Phone #: 212-397-5605 Fax #:  
\* Ship To: The City University Of New York  
230 West 41st St., 9th Floor  
New York, NY 10036  
Attn: Marc White  
Direct Questions To: Marc White, Phone #:212-397-5605

**Vendor Information**

Commodity Type:

### 5.2.1 COMPLETING THE REQUISITION FORM

The Requisition Form screen is split into the 4 sections – Requester; Vendor; Item Selection, Comment, and File Attachment sections. Fields marked with (\*) are required before the Requisition can be saved or submitted for approval.

#### A. REQUESTER INFORMATION Section

The top portion of the form is pre-populated with today’s date and the current fiscal year. If it is not correct, do not continue completing this Requisition and contact the EPS System Administrator / Help Desk.

### University Management & Programs Requisition

Fields marked with \* are required

Req Date: 04/25/2008

Fiscal Year: 08

The Requester portion is pre-populated with information copied from your User Profile and cannot be modified on this screen. If this information is incorrect, then you must update your User Profile by clicking on the “My Profile” link from the sidebar (to the left of the Requisition).

The “Ship To” and “Direct Questions To” fields are also pre-populated with information from your User Profile. However, it can be modified on this screen. NOTE: If the modification is to be permanent, you should update your User Profile.

## CUNY e-PROCUREMENT SYSTEM (EPS)

### Requester Information

College Name:	University Management & Programs	College #:	24
Dept. Name:	OFFICE OF THE UNIVERSITY CONTROLLER	Dept. #:	114
Room #:	N/A	Office Location:	230 West 41st St.
Phone #:	212-397-5605	Fax #:	
* Ship To:	<input type="text" value="The City University Of New York&lt;br/&gt;230 West 41st St., 9th Floor&lt;br/&gt;New York, NY 10036&lt;br/&gt;Attn: Marc White"/>		
Direct Questions To:	<input type="text" value="Marc White, Phone #:212-397-5605"/>		

### B. VENDOR INFORMATION Section

EPS allows free-form entry of vendor information into the appropriate fields on the Requisition form. It also provides the ability to select a vendor from the vendor lists compiled by commodity type.

To select a vendor:

1. Click the down arrow at the right of the “**Commodity Type**” field. This is *optional* and it is to help you filter out the vendor category. You can skip to step 3 if you desire.
2. Scroll down until you find the desired commodity and click on it.
3. Click the “**Select Vendor**” button in the Recommended Vendor #1 section. A list of vendors who supply the commodity (from step 1) is displayed in alphabetical order.
4. If the list fits on one screen, go to step 7. If the list is too long to fit on one screen or if you skipped step 1, a search box is provided. Enter a portion of the vendor name and click the “**GO**” button.
5. Any vendors found whose names start with the letters entered are displayed. Continue with step 7.
6. If no matches are found, the message “**No Vendors were found starting with letters you entered, please search again**” is displayed. Type in the first letter and repeat steps 4 – 6.
7. Scroll down the list until you find the preferred vendor and click on the name. The vendor name, ID, address, phone #, fax #, contact, and business type are populated in the Recommended Vendor #1 section of the screen.

NOTE 1: Any of the populated fields can be modified.

NOTE 2: If you wish to include an alternative vendor, repeat steps 3 – 7 for the Recommended Vendor #2 section.

# CUNY e-PROCUREMENT SYSTEM (EPS)

## Vendor Information

[NYS Office of General Services](#) [GSA Contracts](#) [StaplesLink.com](#)

Commodity Type:	<input type="text" value="SUPPLIES &amp; EQUIPMENT(OFFSET), PRINTING"/>	<input type="text" value="PRSUEQ"/>		
Recommended Vendor #1:	<input type="button" value="Select Vendor"/>	<input type="button" value="Remove Vendor"/>		
Vendor Name:	<input type="text" value="DIGITAL PRINTING"/>	Vendor ID: <input type="text" value="202609503"/>		
Contact Name:	<input type="text"/>			
Addr Line 1:	<input type="text" value="175 VARICK STREET"/>			
Addr Line 2:	<input type="text"/>			
City:	<input type="text" value="NEW YORK"/>	State: <input type="text" value="NY"/>	Zip: <input type="text" value="10014"/>	
Phone #:	<input type="text"/>	Fax #:	<input type="text"/>	Bus. Type: <input type="text" value="SMB"/>
Recommended Vendor #2:	<input type="button" value="Select Vendor"/>	<input type="button" value="Remove Vendor"/>		
Vendor Name:	<input type="text"/>	Vendor ID:	<input type="text"/>	
Contact Name:	<input type="text"/>			
Addr Line 1:	<input type="text"/>			
Addr Line 2:	<input type="text"/>			

### C. LINE ITEMS Section

Click the “Add Item” button. The Requisition Item screen is displayed.

## CUNY e-PROCUREMENT SYSTEM (EPS)

The screenshot shows the 'Requisition Item' form in the CUNY e-Procurement System. The sidebar on the left contains navigation links such as 'HELP', 'FAQs about Procurement', 'About EPS', 'REQUISITIONS', 'Search For Requisitions', 'Assigned To Me', 'Created By Me', 'Require My Approval', 'Require Tech Approval', 'By Status', 'For Purchasing Group', 'Other Requisition Lists', 'Closed/Cancelled Over 90 Days (Archived)', 'BID INVITATIONS (ITB)', 'Search For ITBs', 'By Bid Number', 'PURCHASE ORDERS', 'Search For POs', and 'Assigned To Me'. The main form area is titled 'Requisition Item' and includes a note: 'Fields marked with \* are required'. The form contains the following fields and controls:

- \* Description:** A text area containing 'Bar Code Color Printer'.
- \* Quantity:** A text input field containing '1'.
- \* Price:** A text input field containing '\$ 400'.
- \* Unit:** A dropdown menu set to 'EACH'.
- \* Technology Category:** A dropdown menu set to 'PRINTERS/SCANNERS'.
- \* Commodity Information:** A section with a 'Select Commodity' button and a 'Remove' button. Below it, a table displays 'Code: 9660300000' and 'Description: Bar Code Printing'.

At the bottom of the form, there are four buttons: 'Save And Add Item', 'Save And Close', 'Reset', and 'Close'.

Data must be entered for all the following fields:

- DESCRIPTION - Enter a general description of the product or service you are requesting.
- QUANTITY - Enter the desired number of the described item(s).
- PRICE – Enter the unit price (\$\$.CC).
- UNIT – Click on the arrow to the right of the “Unit” field to select the unit measurement associated with the price. Select the appropriate value by clicking on it.
- TECHNOLOGY CATEGORY – Click the arrow at the right of the “Category” field, and select the correct value for the product or service being requested - If this is a computer related item, select the appropriate technology category; otherwise select NON-TECHNOLOGY.
- COMMODITY INFORMATION – It allows you to select a commodity class and sub-class or you can type in the free-form. To select, click on “Select Commodity” button. You can search by Code or by Description. Click on the arrow at the right of “Search by” and select one. Select “Commodity Class” and “Commodity Sub-Class” by clicking on the arrows next to them. Once you have made your selections, it would be displayed on the screen. Under **Commodity Description**, select the commodity by clicking on it (displayed in blue).

## CUNY e-PROCUREMENT SYSTEM (EPS)

Close Window

**Search By:** Description

**Commodity Class:** PRINTING AND RELATED SERVICES [966]

**Commodity Sub-Class:** Bar Code Printing [03]

- OR -

**Enter Commodity Code:**  Go

- OR -

**Enter Commodity Description:**  Go

---

Commodity Description	Commodity Code
<a href="#">Bar Code Printing</a>	96603000000
<a href="#">TEMP</a>	96603000010

If you want to add more items, click on “Save and Add item”. If you are done, click on “Save and Close”. If you want to start over, click on “Reset”. If you do not want to save changes, click “Close”.

Line Items
Add Item

Description of Material/Service	Commodity	Quantity	Unit	Price	Amount
<a href="#">Bar Code Color Printer</a>	96603000000	1	EACH	\$400.00	\$400.00
<b>Total Amount For All Items:</b>					\$400.00

**Delivery Date:**

**Annual/Continuous:**     Yes  No

**Memorandum Of Understanding:**     Yes  No

**Charged to Procurement or Travel Card:**     Yes  No

- Delivery Date is the date that you want the items to be delivered. Click on the icon next to “**Delivery Date**” field to select a date.
- Select YES/NO if you want the Requisition to be Annual/Continuous. The default option is NO.

## CUNY e-PROCUREMENT SYSTEM (EPS)

- Select YES/NO if you want a Memorandum of Understanding. The default option is NO.
- Select YES/NO if you want to charge to Procurement/Travel Card. The default option is NO.

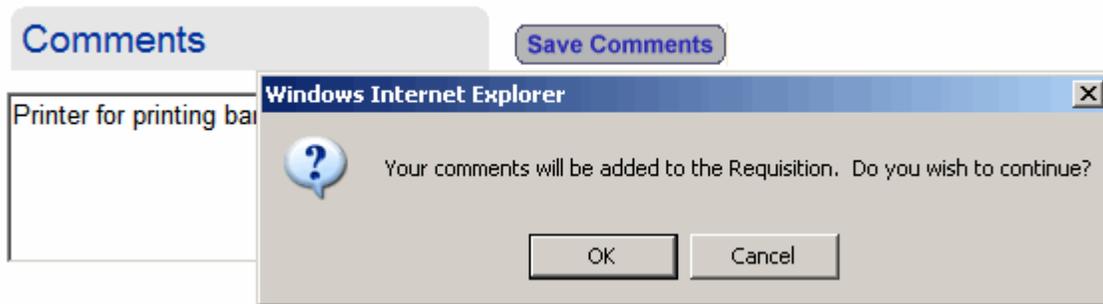
### D. COMMENTS / FILE ATTACHMENTS Section

Entry of comments is optional. They can be entered at any time during the Requisition creation/approval process and generally reflect further explanations about the Requisition as it passes through its various stages. All comments entered (regardless of who entered them) are kept with the Requisition throughout its life, for historical purposes. The Comments section is generally used by:

- Requesters to enter a justification (or clarification) of why the purchase is being requested.
- Approvers 1 and 2 to enter “worth and wisdom” statements for the purchase.
- Approver 3 to indicate fiscal information.

To enter **Comments**:

1. Type them in the Comments box and click the “Save Comments” button. A pop-up window is displayed confirming that the Comments will be added to the Requisition and asking you if you wish to continue.
2. Click the OK button. Notice that the comments history is updated.



Comments

Save Comments

Printer for printing bar

Date - Initials:	Comments:
04/25/2008 - MW	Printer for printing bar codes to tag items

## CUNY e-PROCUREMENT SYSTEM (EPS)

To attach electronic **File Attachments**:

1. Click the “Browse” button. A pop-up window containing the Windows file selection box appears.
2. If the folder displayed in the ‘Look In’ box is not the correct folder, click the arrow at the left of the box, scroll to the appropriate folder and click on it.
3. Select the desired file from the list displayed by clicking on it. Notice that the file appears in the ‘File Name’ box.  
NOTE: Double clicking on the file name eliminates the need for the next step.
4. Click the Open button.
5. Click the “Save Attachment” button.
6. Repeat steps 1 – 5 to attach more files. Notice that you can see the list of attached files. You can delete them by checking the box next to them and clicking “Delete Files”.

### File Attachments

[Save Attachment](#)

Enter Attachment:

[Browse...](#)

[Help](#)

**NOTE:** If the file name you are entering contains apostrophe ( ' ) or pound ( # ) characters, please remove them from the file name before attaching the file to this document.

<input type="checkbox"/> <a href="#">test1.txt</a>
<input type="checkbox"/> <a href="#">test2.txt</a>
<a href="#">Check All</a> - <a href="#">Clear All</a> <a href="#">Delete Files</a>

## CUNY e-PROCUREMENT SYSTEM (EPS)

### 5.3 SUBMITTING THE REQUISITION

Following the Attachments box are 3 buttons that allow you to:

1. Submit for Approval - Clicking on this button moves the Requisition to the appropriate Approval step. An e-mail notification is automatically generated to notify the approver that a Requisition has been submitted for their approval.
2. Save as Draft - Clicking on this button saves all data entered and allows you to modify the Requisition before submitting for approval.
3. Delete Draft Req. – Clicking on this button deletes the drafted Requisition.
4. Close - Clicking on this button brings you to the Requisitions by Status list without saving data entered.

Notice that just below these buttons is the Approval “route” the submitted Requisition will take and a history of where the Requisition has been.

Approvers:

Approver 1 Appr1 UserUAO	Approver 2 Appr2 UserUAO	Approver 3 Appr3 UserUAO
Alternate Approver 1 Alt1 UserUAO	Alternate Approver 2 Alt2 UserUAO	Alternate Approver 3 Alt3 UserUAO

Requisition History:

Name:	Date:	Status	Comments:
Marc White3	04/25/2008 03:04:08 PM	Draft	Requisition was saved after entering comments
Marc White3	04/25/2008 03:10:15 PM	Draft	Added a file attachment
Marc White3	04/25/2008 03:10:25 PM	Draft	Deleted file attachment(s)
Marc White3	04/25/2008 03:10:37 PM	Draft	Added a file attachment
Marc White3	04/25/2008 03:10:50 PM	Draft	Added a file attachment

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 5.4 E-MAIL NOTIFICATION

As part of the Requisition process, users will receive e-mail notifications relating to specific Requisitions or Purchase Orders. These notifications may describe an action the user must perform (e.g. approve a submitted Requisition) or a condition that needs their attention (e.g. change in status for a Requisition they submitted).



The above shows an e-Procurement email notification received, indicating that a Requisition was submitted pending approval 1.

When an e-mail notification is received, the specified Requisition or Purchase Order can be viewed by following these steps:

- Click on the URL link in the e-mail message. The system displays the appropriate login screen.
- Once successfully logged in, the Requisition is automatically displayed for your viewing and/or approval.

**University Management & Programs Requisition**

[Edit Info](#) [Print Preview](#)

Status: **Pending Approval 1** Req #: 1148003  
Req Date: 04/25/2008 Fiscal Year: 08

**Requester Information**

College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Room #: N/A Office Location: 230 West 41st St.  
Phone #: 212-397-5605 Fax #:  
Ship To: The City University Of New York  
230 West 41st St., 9th Floor  
New York, NY 10036  
Attn: Marc White  
Direct Questions To: Marc White, Phone # 212-397-5605

**Vendor Information**

[NYS Office of General Services](#) [GSA Contracts](#) [StaplesLink.com](#)

Commodity Type: SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 6.0 REQUISITION APPROVAL PROCESS

### 6.1 APPROVAL - LEVELS 1 and 2

Approvers / Alternates at levels 1 and 2 are able to access Requisitions requiring their approval in either of the following ways:

- By clicking on the URL in an e-mail notification, then logging in to the system. The Requisition requiring approval is automatically displayed.
- By clicking on the links under the “Requisitions” section in the sidebar. The “Require My Approval” list will show only those Requisitions that require your approval.

**Reqs Requiring My Approval**

[Collapse](#)   [Expand](#)   [Previous](#)   [Next](#)   [Search](#)

Status	Dept	Date	Requester	Req #	FAS Desc	Total
▼ Pending Approval 1						
▼ OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)						
	04/25/2008	Marc White3	<a href="#">1148003</a>	EPS-Bar Code Color		\$400.00
	11/14/2007	Marc White3	<a href="#">1147139</a>	EPS-test		\$10.00
	10/26/2007	Avg1 UserUAO	<a href="#">1148002</a>	EPS-item # 1		\$6.00
	05/31/2007	Avg1 UserUAO	<a href="#">1147074</a>	EPS-test		\$6.00
	03/01/2007	Marc White3	<a href="#">1147066</a>	EPS-Cards, Unvers		\$133.75
	03/01/2007	Marc White3	<a href="#">1147056</a>	EPS-Calendars, At-		\$1.00
	02/21/2007	Avg1 UserUAO	<a href="#">1147047</a>	EPS-item # 1		\$98.19
	12/04/2006	Marc White3	<a href="#">1147037</a>	EPS-test		\$73.69
▼ UNIVERSITY CONTRACTING OFFICE. (2-173-00)						
	11/19/2007	Avg1 UserUAO	<a href="#">1737016</a>	EPS-item # 1		\$634.00
	03/09/2007	Avg1 UserUAO	<a href="#">1737001</a>	EPS-item # 1		\$455.00
	03/09/2007	Avg1 UserUAO	<a href="#">1737009</a>	EPS-Calendars, At-		\$15.00

[Collapse](#)   [Expand](#)   [Previous](#)   [Next](#)   [Search](#)

- The “By Status” list allows you to select Requisitions by status.
  - Select from the drop-down by **Pending Approval 1** or **Pending Approval 2**.
  - Click on the **Requisition number** (displayed in blue).
  - Click on the “Edit Info” button in the Requisition.

# CUNY e-PROCUREMENT SYSTEM (EPS)



The City University of New York

**e-Procurement**

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**REQUISITIONS**

Search For Requisitions

Created By Me

Require My Approval

By Status

Other Requisition Lists

Closed/Cancelled Over 90 Days (Archived)

**PURCHASE ORDERS**

Search For POs

By Status

Other PO Lists

Older Than Two Fiscal Years (Archived)

**RECEIVING REPORTS**

Search For Recvng Rpts

All By PO Number

## Requisitions By Status

### Pending Approval 1

Select Requisition Status:

[Search](#)

Dept	Date	Req #	Requester	FAS Desc	Total	x-ref PO #	x-ref
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	04/25/2008	<a href="#">1148003</a>	Marc White3	EPS-Bar Code Color	\$400.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	11/14/2007	<a href="#">1147139</a>	Marc White3	EPS-test	\$10.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	10/26/2007	<a href="#">1148002</a>	Avg1 UserUAO	EPS-item # 1	\$6.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	05/31/2007	<a href="#">1147074</a>	Avg1 UserUAO	EPS-test	\$6.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	03/01/2007	<a href="#">1147056</a>	Marc White3	EPS-Calendars, At-	\$1.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	03/01/2007	<a href="#">1147066</a>	Marc White3	EPS-Cards, Univers	\$133.75		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	02/21/2007	<a href="#">1147047</a>	Avg1 UserUAO	EPS-item # 1	\$98.19		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	12/04/2006	<a href="#">1147037</a>	Marc White3	EPS-test	\$73.69		
UNIVERSITY CONTRACTING OFFICE. (2-173-00)	11/19/2007	<a href="#">1737016</a>	Avg1 UserUAO	EPS-item # 1	\$634.00		
UNIVERSITY CONTRACTING OFFICE. (2-173-00)	03/09/2007	<a href="#">1737001</a>	Avg1 UserUAO	EPS-item # 1	\$455.00		
UNIVERSITY CONTRACTING OFFICE. (2-173-00)	03/09/2007	<a href="#">1737009</a>	Avg1 UserUAO	EPS-Calendars, At-	\$15.00		

[Search](#)

- The completed Requisition form is displayed with two (2) buttons – “Edit Info” and “Print Preview”, in the upper right corner of the screen. Use “Print Preview” to print out a copy of the Requisition form. NOTE: If only the “Print Preview” button displays, you selected a Requisition you are not authorized to edit/approve.



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**REQUISITIONS**

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Other Requisition Lists

Closed/Cancelled Over 90 Days (Archived)

**PURCHASE ORDERS**

Search For POs

By Status

Other PO Lists

Older Than Two Fiscal Years (Archived)

**RECEIVING REPORTS**

Search For Recvng Rpts

All By PO Number

## University Management & Programs Requisition

**Status:** Pending Approval 1      **Req #:** 1148003  
**Req Date:** 04/25/2008      **Fiscal Year:** 08

**Requester Information**

<b>College Name:</b> University Management & Programs	<b>College #:</b> 24
<b>Dept. Name:</b> OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b> 114
<b>Room #:</b> N/A	<b>Office Location:</b> 230 West 41st St.
<b>Phone #:</b> 212-397-5605	<b>Fax #:</b>
<b>Ship To:</b> The City University Of New York 230 West 41st St., 9th Floor New York, NY 10036 Attn: Marc White	
<b>Direct Questions To:</b> Marc White, Phone #:212-397-5605	

**Vendor Information**

[NYS Office of General Services](#)  
 [GSA Contracts](#)  
 [StaplesLink.com](#)

**Commodity Type:** SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

## CUNY e-PROCUREMENT SYSTEM (EPS)

2. Click on the “Edit Info” button to modify (e.g. changing data or entering comments), approve, or reject the Requisition.
3. When review/modification is concluded, click on:
  - Approve Requisition – to move the Requisition to the next level of Approval. (This can be verified by viewing the Requisitions by Status screen).
  - Reject Requisition – to send the Requisition back to the requester. If Reject Requisition is selected, a pop-up confirmation window is displayed with the question ‘Are you sure you wish to reject this Requisition?’ Click the Cancel button to bring you back to the Requisition.



- Click the OK button to display a pop-up window prompting you to supply a reason for rejection. Enter a reason and click OK. The Requisition form window closes, and you are returned to the Requisition selection screen you started with. Notice the Requisition is now listed under the Rejected status.



NOTE: If you click Cancel, another pop-up window appears warning you that you must enter comments for a Rejection.



- Save and Close – Saves the modified Requisition and returns you to the Requisition list. The Requisition is not approved.

## ***CUNY e-PROCUREMENT SYSTEM (EPS)***

- Close – Returns you to the Requisition list without saving entered/modified data. The Requisition is not approved.

NOTE: The Requisition history is updated as you go through its life-cycle. If a rejected Requisition is submitted for approval again, it will be reflected in the history.

<input type="button" value="Approve Requisition"/> <input type="button" value="Reject Requisition"/> <input type="button" value="Save And Close"/> <input type="button" value="Close"/>																																				
<b>Approvers:</b>																																				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; padding: 2px;"><b>Approver 1</b> Appr1 UserUAO</td> <td style="width: 33%; padding: 2px;"><b>Approver 2</b> Appr2 UserUAO</td> <td style="width: 33%; padding: 2px;"><b>Approver 3</b> Appr3 UserUAO</td> </tr> <tr> <td style="padding: 2px;"><b>Alternate Approver 1</b> Alt1 UserUAO</td> <td style="padding: 2px;"><b>Alternate Approver 2</b> Alt2 UserUAO</td> <td style="padding: 2px;"><b>Alternate Approver 3</b> Alt3 UserUAO</td> </tr> </table>	<b>Approver 1</b> Appr1 UserUAO	<b>Approver 2</b> Appr2 UserUAO	<b>Approver 3</b> Appr3 UserUAO	<b>Alternate Approver 1</b> Alt1 UserUAO	<b>Alternate Approver 2</b> Alt2 UserUAO	<b>Alternate Approver 3</b> Alt3 UserUAO																														
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<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">Name:</th> <th style="text-align: left; padding: 2px;">Date:</th> <th style="text-align: left; padding: 2px;">Status</th> <th style="text-align: left; padding: 2px;">Comments:</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Avg1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:20:37 PM</td> <td style="padding: 2px;">Draft</td> <td style="padding: 2px;">Requisition was saved after entering comments</td> </tr> <tr> <td style="padding: 2px;">Avg1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:22:47 PM</td> <td style="padding: 2px;">Draft</td> <td style="padding: 2px;">Added a file attachment</td> </tr> <tr> <td style="padding: 2px;">Avg1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:23:19 PM</td> <td style="padding: 2px;">Draft</td> <td style="padding: 2px;">Added a file attachment</td> </tr> <tr> <td style="padding: 2px;">Avg1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:29:54 PM</td> <td style="padding: 2px;">Pending Approval 1</td> <td style="padding: 2px;">Submitted Requisition for approval</td> </tr> <tr> <td style="padding: 2px;">Appr1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:47:57 PM</td> <td style="padding: 2px;">Pending Approval 1</td> <td style="padding: 2px;">Requisition was saved after entering comments</td> </tr> <tr> <td style="padding: 2px;">Appr1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:51:12 PM</td> <td style="padding: 2px;">Rejected</td> <td style="padding: 2px;">Rejected Requisition. Reason: The printer is not needed</td> </tr> <tr> <td style="padding: 2px;">Avg1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:53:16 PM</td> <td style="padding: 2px;">Rejected</td> <td style="padding: 2px;">Requisition was saved after entering comments</td> </tr> <tr> <td style="padding: 2px;">Avg1 UserUAO</td> <td style="padding: 2px;">10/25/2007 02:53:23 PM</td> <td style="padding: 2px;">Pending Approval 1</td> <td style="padding: 2px;">Submitted Requisition for approval</td> </tr> </tbody> </table>	Name:	Date:	Status	Comments:	Avg1 UserUAO	10/25/2007 02:20:37 PM	Draft	Requisition was saved after entering comments	Avg1 UserUAO	10/25/2007 02:22:47 PM	Draft	Added a file attachment	Avg1 UserUAO	10/25/2007 02:23:19 PM	Draft	Added a file attachment	Avg1 UserUAO	10/25/2007 02:29:54 PM	Pending Approval 1	Submitted Requisition for approval	Appr1 UserUAO	10/25/2007 02:47:57 PM	Pending Approval 1	Requisition was saved after entering comments	Appr1 UserUAO	10/25/2007 02:51:12 PM	Rejected	Rejected Requisition. Reason: The printer is not needed	Avg1 UserUAO	10/25/2007 02:53:16 PM	Rejected	Requisition was saved after entering comments	Avg1 UserUAO	10/25/2007 02:53:23 PM	Pending Approval 1	Submitted Requisition for approval
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<a href="#">Requester</a> <a href="#">Vendors</a> <a href="#">Items</a> <a href="#">Comments</a> <a href="#">Approver/Hist</a> <a href="#">Top</a>																																				

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 6.2 TECH APPROVAL

As with Approvers at levels 1 and 2, tech approvers are able to access Requisitions requiring their approval in either of the following ways:

- By clicking on the URL in an e-mail notification, then logging in to the system. The Requisition requiring approval is automatically displayed.
- By clicking on the links under the “Requisitions” section in the sidebar. The “Require Tech Approval” list will show only those Requisitions that require your approval.

The screenshot shows the CUNY e-Procurement system interface. On the left is a sidebar with navigation options: HELP, FAQs about Procurement, About EPS, REQUISITIONS (with sub-options: Search For Requisitions, Created By Me, Require Tech Approval, By Status, Other Requisition Lists, Closed/Cancelled Over 90 Days (Archived)), PURCHASE ORDERS (with sub-options: Search For POs, By Status, Other PO Lists, Older Than Two Fiscal Years (Archived)), RECEIVING REPORTS (with sub-options: Search For Recvng Rpts, All By PO Number), and a dropdown menu. The main content area is titled "Reqs Requiring Tech Approval" and contains a table with columns: Dept, Date, Requester, Req #, FAS Desc, and Total. A single requisition is listed: OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00) on 04/25/2008, requested by Marc White3, with requisition number 1148003, description EPS-Bar Code Color, and a total of \$400.00. Navigation links (Collapse, Expand, Previous, Next, Search) are provided above and below the table.

- In the “By Status” list, select from the drop-down by **Pending Tech Approval**.
  - Click on the **Requisition number** (displayed in blue)
  - Click on the “Edit Info” button in the Requisition.

# CUNY e-PROCUREMENT SYSTEM (EPS)

**Requisitions By Status**  
**Pending Tech Approval**

Select Requisition Status: Pending Tech Approval

[Search](#)

Dept	Date	Req #	Requester	FAS Desc	Total	x-ref PO #	x-ref B
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	04/25/2008	<a href="#">1148003</a>	Marc White3	EPS-Bar Code Color	\$400.00		

[Search](#)

The selection method for Tech Approvers is the same as for Levels 1 and 2 (see section [6.1 Approval - Levels 1 and 2](#)).

**University Management & Programs Requisition**

[Edit Info](#) [Print Preview](#)

**Status:** Pending Tech Approval      **Req #:** 1148003

**Req Date:** 04/25/2008      **Fiscal Year:** 08

**Requester Information**

<b>College Name:</b>	University Management & Programs	<b>College #:</b>	24
<b>Dept. Name:</b>	OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b>	114
<b>Room #:</b>	N/A	<b>Office Location:</b>	230 West 41st St.
<b>Phone #:</b>	212-397-5605	<b>Fax #:</b>	
<b>Ship To:</b>	The City University Of New York 230 West 41st St., 9th Floor New York, NY 10036 Attn: Marc White		
<b>Direct Questions To:</b>	Marc White, Phone #:212-397-5605		

**Vendor Information**      [NYS Office of General Services](#)   [GSA Contracts](#)   [StaplesLink.com](#)

**Commodity Type:** SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 6.3 APPROVAL - LEVEL 3

As with Approvers at levels 1 and 2, Approvers / Alternates at level 3 are able to access Requisitions requiring their approval in either of the following ways:

- By clicking on the URL in an e-mail notification, then logging in to the system. The Requisition requiring approval is automatically displayed.
- By clicking on the links under the “Requisitions” section in the sidebar. The “Require My Approval” list will show only those Requisitions that require your approval.

**Reqs Requiring My Approval**

[Collapse](#)   [Expand](#)   [Previous](#)   [Next](#)   [Search](#)

Status	Dept	Date	Requester	Req #	FAS Desc	Total
▼ FAS Conflict						
▼ OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)						
		07/16/2007	Marc White3	<a href="#">1147085</a>	EPS-Calendars, NYS	\$55.00
▼ Pending Approval 3						
▼ IFR-UAPC (3-293-20)						
		03/20/2008	Marc White3	<a href="#">2937009</a>	EPS-item # 1	\$4.00
▼ OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)						
		04/25/2008	Marc White3	<a href="#">1148003</a>	EPS-Bar Code Color	\$400.00
		11/14/2007	Avg1 UserUAO	<a href="#">1147140</a>	EPS-test	\$10.00

[Collapse](#)   [Expand](#)   [Previous](#)   [Next](#)   [Search](#)

- In the “By Status” list, select from the drop-down by **Pending Approval 3, Insufficient Funds, or FAS Conflict.**
  - Click on the **Requisition number** (displayed in blue)
  - Click on the “Edit Info” button in the Requisition.

# CUNY e-PROCUREMENT SYSTEM (EPS)



**e-Procurement**

**HELP**

FAQs about Procurement

About EPS

**REQUISITIONS**

Search For Requisitions

Created By Me

Require My Approval

By Status

Other Requisition Lists

Closed/Cancelled Over 90 Days (Archived)

**PURCHASE ORDERS**

Search For POs

By Status

Other PO Lists

Older Than Two Fiscal Years (Archived)

**RECEIVING REPORTS**

Search For Recvng Rpts

All By PO Number

## Requisitions By Status

### Pending Approval 3

Select Requisition Status:

[Search](#)

Dept	Date	Req #	Requester	FAS Desc	Total	x-ref PO #	x-ref
IFR-UAPC (3-293-20)	03/20/2008	<a href="#">2937009</a>	Marc White3	EPS-item # 1	\$4.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	04/25/2008	<a href="#">1148003</a>	Marc White3	EPS-Bar Code Color	\$400.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	11/14/2007	<a href="#">1147140</a>	Avg1 UserUAO	EPS-test	\$10.00		

[Search](#)



**e-Procurement**

**HELP**

FAQs about Procurement

About EPS

**REQUISITIONS**

Search For Requisitions

Created By Me

Require My Approval

By Status

Other Requisition Lists

Closed/Cancelled Over 90 Days (Archived)

**PURCHASE ORDERS**

Search For POs

By Status

Other PO Lists

Older Than Two Fiscal Years (Archived)

**RECEIVING REPORTS**

Search For Recvng Rpts

All By PO Number

## University Management & Programs Requisition

**Status:** Pending Approval 3      **Req #:** 1148003  
**Req Date:** 04/25/2008      **Fiscal Year:** 08

**Requester Information**

**College Name:** University Management & Programs      **College #:** 24  
**Dept. Name:** OFFICE OF THE UNIVERSITY CONTROLLER      **Dept. #:** 114  
**Room #:** N/A      **Office Location:** 230 West 41st St.  
**Phone #:** 212-397-5605      **Fax #:**  
**Ship To:** The City University Of New York  
 230 West 41st St., 9th Floor  
 New York, NY 10036  
 Attn: Marc White  
**Direct Questions To:** Marc White, Phone #:212-397-5605

**Vendor Information**

[NYS Office of General Services](#)    [GSA Contracts](#)    [StaplesLink.com](#)

**Commodity Type:** SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

## *CUNY e-PROCUREMENT SYSTEM (EPS)*

The process at this level is the same as for steps 1-3 in Levels 1 and 2 (see section [6.1 Approval - Levels 1 and 2](#)), except for two (2) sections that only pertain to level 3 approvers. These are:

**a. Charge to Department Name:** The default is the department under which the Requisition was created. If another department is to absorb the cost of this Requisition, change that department by:

- Clicking on the “Select Dept” button (right side of the Dept. Code) which displays the departments associated with the Approver’s user profile.
- Clicking on the correct Department Name (displayed in blue).

NOTE: Charging the Requisition to another department does not change the original Requisition or the automatic e-mail notification sequence. You will also need to enter a FAS Account Code.



<b>* Charge To Department Name:</b>		<b>* Charge To Dept Code:</b>	
<input type="text" value="OFFICE OF THE UNIVERSITY CONTROLLER"/>		<input type="text" value="114"/>	<input type="button" value="Select Dept"/>

<b>* FAS Account Code:</b>			
<b>Ledger:</b>	<b>Dept:</b>	<b>Program Code:</b>	<b>Expense Code:</b>
<input type="text" value="2"/>	<input type="text" value="114"/>	<input type="text" value="00"/>	<input type="text" value="200 [ SUPPLIES.OFFICE ]"/>

To enter the FAS Account Code, select the **Program Code** and **Expense Code** from the drop-down boxes.

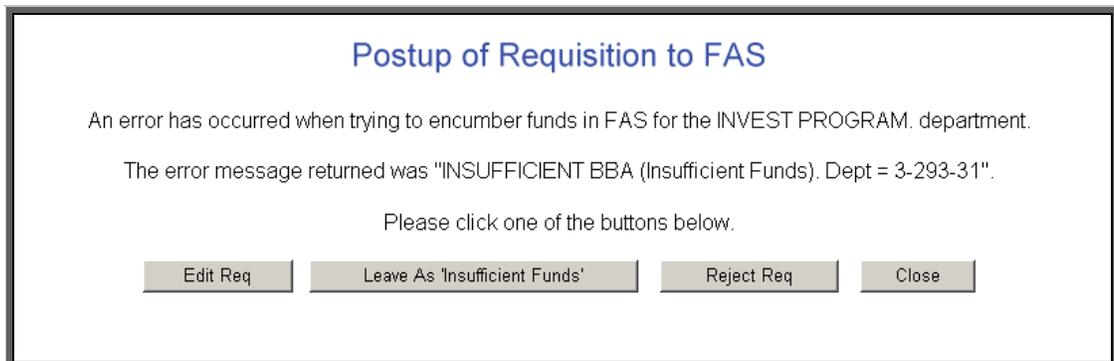
## CUNY e-PROCUREMENT SYSTEM (EPS)

When review/modification of the Requisition is concluded, click on:

- **Approve Requisition** - This automatically submits the Requisition for FAS encumbrance.
  - If there are sufficient funds, the Requisition will be encumbered in the Financial Accounting System (FAS) and the system will display a pop-up window confirming the encumbrance, and move the Requisition to the status of Pending PO. The Requisition form window closes, and you are returned to the Requisition selection screen you started with. Notice the Requisition is now listed under **Pending PO** status.

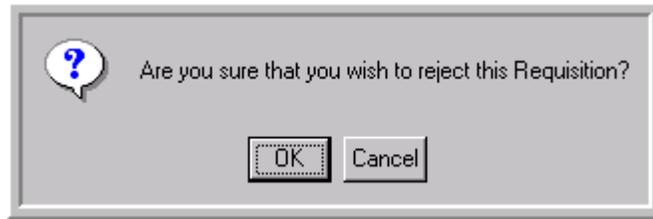


- If there are insufficient funds in the FAS system, the e-Procurement system displays the following message with the options to:
  - Edit Req.: Use this option if you think the cost amount estimated is incorrect – the Requisition can be modified and be re-approved.
  - Leave as 'Insufficient Funds': Use this option if you are not sure what your next steps should be. It moves the Requisition to a FAS Conflict status.
  - Reject Req.: Use this option to send the Requisition back to Approver 2.
  - Close: Use this option if you want to close the Requisition.

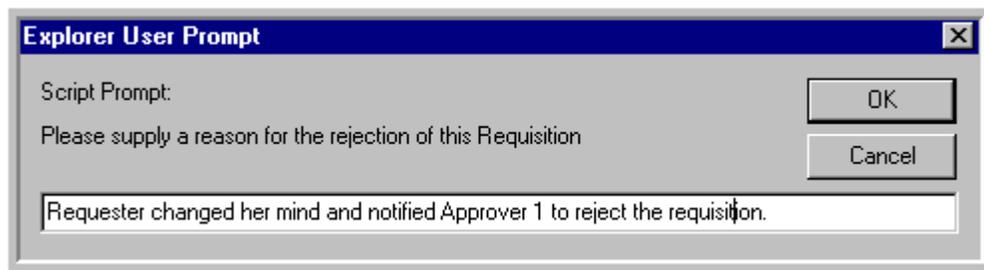


- **Reject Requisition** – to send the Requisition back to the Approver 2. If Reject Requisition is selected, a pop-up confirmation window is displayed with the question ‘Are you sure you wish to reject this Requisition?’ Click Cancel to bring you back to the Requisition.

## *CUNY e-PROCUREMENT SYSTEM (EPS)*



- Click OK to display a pop-up window prompting you to supply a reason for rejection.  
 NOTE: If you click Cancel, another pop-up window appears warning you that you must enter comments for a Rejection.



- Click OK. The Requisition form window closes, and you are returned to the Requisition selection screen you started with.  
 Notice the Requisition is now listed under the Rejected status.

NOTE: The Requisition history is updated as you go through its life-cycle.

**Requisition History:**

Name:	Date:	Status	Comments:
Marc White3	04/25/2008 03:04:08 PM	Draft	Requisition was saved after entering comments
Marc White3	04/25/2008 03:10:15 PM	Draft	Added a file attachment
Marc White3	04/25/2008 03:10:25 PM	Draft	Deleted file attachment(s)
Marc White3	04/25/2008 03:10:37 PM	Draft	Added a file attachment
Marc White3	04/25/2008 03:10:50 PM	Draft	Added a file attachment
Marc White3	04/25/2008 03:16:50 PM	Pending Approval 1	Submitted Requisition for approval
Appr1 UserUAO	04/25/2008 03:59:35 PM	Pending Approval 2	Approved Requisition
Appr2 UserUAO	04/25/2008 04:00:27 PM	Pending Tech Approval	Approved Requisition
TechApprover1 UserUAO	04/25/2008 04:08:44 PM	Pending Approval 3	Approved Requisition
Appr3 UserUAO	04/25/2008 04:20:42 PM	Pending PO	Approved Requisition for postup to FAS. Charged Dept is OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00). Purchasing team is PURCHASING24-UCO

If there are any conflicts, it will be listed under the Requisition history.

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 7.0 PURCHASE ORDER PROCESS

### 7.1 GENERATING/ASSIGNING A PURCHASE ORDER

Once funds are encumbered for the Requisition, the Purchase Order process begins with the Requisition being moved to a Pending PO status.

To assign a Requisition to a buyer in the Purchasing department:

- Click on the links under the “Requisitions” section in the sidebar. The “Pending PO” list shows all Requisitions that are Pending PO.

The screenshot displays the CUNY e-Procurement system interface. On the left is a sidebar with navigation options: 'e-Procurement' with 'Password' and 'Logout' buttons, a 'Create Requisition' button, and sections for 'HELP' (FAQs about Procurement, About EPS), 'REQUISITIONS' (Search For Requisitions, Assigned To Me, Created By Me, By Status, For Purchasing Group, Other Requisition Lists, Closed/Cancelled Over 90 Days (Archived)), 'BID INVITATIONS (ITB)' (Search For ITBs, By Bid Number), and 'PURCHASE ORDERS' (Search For POs, Assigned To Me, By Status, With Attached Invoice). The main content area is titled 'Requisitions Pending PO' and features 'Previous', 'Next', and 'Search' links. Below these links is a table with the following data:

Enc Date	Req #	Dept	FAS Desc	Delivery Date	Total
04/25/2008	<a href="#">1148003</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-Bar Code Color		\$400.00
03/31/2008	<a href="#">1147150</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-item # 1		\$2.00
03/25/2008	<a href="#">1778002</a>	BLDG. & GROUNDS- MAINT (2-177-01)	EPS-item # 1		\$134.50
03/25/2008	<a href="#">2937010</a>	IFR-UAPC (3-293-20)	EPS-ITEM # 2		\$57.20
03/25/2008	<a href="#">2937011</a>	IFR-UAPC (3-293-20)	EPS-item # 1		\$22.60
03/25/2008	<a href="#">3448001</a>	RENT (2-344-22)	EPS-item # 1		\$61.60
03/25/2008	<a href="#">3448002</a>	RENT (2-344-22)	EPS-item # 1		\$69.00
11/20/2007	<a href="#">1147130</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-item # 1		\$36.00
11/20/2007	<a href="#">2937007</a>	INVEST PROGRAM. (3-293-31)	EPS-Printer	08/31/2007	\$600.00
10/19/2007	<a href="#">1147026</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-item # 1		\$4.00
02/21/2007	<a href="#">1147044</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-item # 1		\$200.00
10/10/2006	<a href="#">1146087</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-test		\$4.00
10/06/2006	<a href="#">1147017</a>	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	EPS-item # 1		\$1,500.00
09/28/2006	<a href="#">1736002</a>	UNIVERSITY CONTRACTING OFFICE. (2-173-00)	EPS-Boards, NYS In	05/16/2006	\$169.45

- In the “By Status” list, select from the drop-down by **Pending PO**.
  - Click on the **Requisition number** (displayed in blue)
  - Click on the “Edit Info” button in the Requisition.

## CUNY e-PROCUREMENT SYSTEM (EPS)



[Password](#) [Logout](#)  
[Create Requisition](#)

**HELP**

[FAQs about Procurement](#)

[About EPS](#)

**REQUISITIONS**

[Search For Requisitions](#)

[Assigned To Me](#)

[Created By Me](#)

[By Status](#)

[For Purchasing Group](#)

[Other Requisition Lists](#)

[Closed/Cancelled Over 90 Days \(Archived\)](#)

**BID INVITATIONS (ITB)**

[Search For ITBs](#)

[By Bid Number](#)

**PURCHASE ORDERS**

[Search For POs](#)

[Assigned To Me](#)

[By Status](#)

[With Attached Invoice](#)

### Requisitions By Status Pending PO

Select Requisition Status:

[Search](#)

Dept	Date	Req #	Requester	FAS Desc	Total	x-ref PO #	x-r
BLDG. & GROUNDS- MAINT (2-177-01)	03/25/2008	<a href="#">1778002</a>	Avg1 UserUAO	EPS-item # 1	\$134.50		
IFR-UAPC (3-293-20)	03/25/2008	<a href="#">2937011</a>	Avg1 UserUAO	EPS-item # 1	\$22.60		
IFR-UAPC (3-293-20)	03/25/2008	<a href="#">2937010</a>	Avg1 UserUAO	EPS-ITEM # 2	\$57.20		
INVEST PROGRAM. (3-293-31)	08/20/2007	<a href="#">2937007</a>	Avg1 UserUAO	EPS-Printer	\$600.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	04/25/2008	<a href="#">1148003</a>	Marc White3	EPS-Bar Code Color	\$400.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	03/31/2008	<a href="#">1147150</a>	Marc White3	EPS-item # 1	\$2.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	10/11/2007	<a href="#">1147130</a>	Avg1 UserUAO	EPS-item # 1	\$36.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	02/21/2007	<a href="#">1147044</a>	Marc White3	EPS-item # 1	\$200.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	10/20/2006	<a href="#">1147026</a>	Marc White3	EPS-item # 1	\$4.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	08/31/2006	<a href="#">1147017</a>	Avg1 UserUAO	EPS-item # 1	\$1,500.00		
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	07/11/2006	<a href="#">1146087</a>	Marc White3	EPS-test	\$4.00		
RENT (2-344-22)	03/25/2008	<a href="#">3448002</a>	Avg1 UserUAO	EPS-item # 1	\$69.00		
RENT (2-344-22)	03/25/2008	<a href="#">3448001</a>	Avg1 UserUAO	EPS-item # 1	\$61.60		
UNIVERSITY CONTRACTING OFFICE. (2-173-00)	07/28/2005	<a href="#">1736002</a>	Marc White3	EPS-Boards, NYS In	\$169.45		

[Search](#)



[Password](#) [Logout](#)  
[Create Requisition](#)

**HELP**

[FAQs about Procurement](#)

[About EPS](#)

**REQUISITIONS**

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**BID INVITATIONS (ITB)**

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### University Management & Programs Requisition

[Edit Info](#) [Print Preview](#)

**Status:** Pending PO      **Req #:** 1148003  
**Req Date:** 04/25/2008      **Fiscal Year:** 08

**Requester Information**

<b>College Name:</b> University Management & Programs	<b>College #:</b> 24
<b>Dept. Name:</b> OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b> 114
<b>Room #:</b> N/A	<b>Office Location:</b> 230 West 41st St.
<b>Phone #:</b> 212-397-5605	<b>Fax #:</b>
<b>Ship To:</b> The City University Of New York 230 West 41st St., 9th Floor New York, NY 10036 Attn: Marc White	
<b>Direct Questions To:</b> Marc White, Phone #:212-397-5605	

**Vendor Information**

[NYS Office of General Services](#)    [GSA Contracts](#)    [StaplesLink.com](#)

**Commodity Type:** SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

When the Requisition detail screen is displayed, scroll down to the **ASSIGN TO** section to assign it to a person in the purchasing department. The purchasing person (buyer) will be responsible for finalizing and tracking the order.

- Click the down arrow associated with the Assign To field. Select a person by highlighting it.

## ***CUNY e-PROCUREMENT SYSTEM (EPS)***

- Select a Processing Option – Purchase Order, Contract, or Direct Pay. Once you select one, select the Procurement Method by clicking on the down arrow next to that field.
- To assign the Requisition, click on the “Assign Requisition” button. The Requisition status changes to ASSIGNED and is now ready to be finalized. If you click the “Save and Close” button the Requisition will be saved, but it will not be assigned. If you click the “Cancel Requisition” button, the Requisition will be cancelled (see section [7.2 Cancelling a Requisition/Purchase Order](#)). If you click the “Close” button, you will not save any of the changes made.

\* Assign To:

\* Processing Option:  Purchase Order  Contract  Direct Pay

\* Procurement Method:

## CUNY e-PROCUREMENT SYSTEM (EPS)

### 7.2 CANCELLING A REQUISITION/PURCHASE ORDER

- If the Requisition must be cancelled at any time prior to submission, click the “Cancel Requisition” button. The following message is displayed:



- When you click the OK button, this pop-up box is displayed. A reason must be supplied for cancelling the Requisition. Click “OK” to cancel the Requisition. The Requisition status is changed to “Cancelled in FAS”.



- If you do not supply a reason, the following message is displayed:



# CUNY e-PROCUREMENT SYSTEM (EPS)

## 7.3 BID PROCEDURE

Selecting the Procurement Method of Bid Procedure\* provides the opportunity to get the best price for item(s) being purchased. It allows selected vendors to submit pricing offers and involves the following steps:

- Invitation to Bid – Preparing invitations to bid detailing the expectations from selected vendors for submitting their bids. Using the Mail Merge Files to create the invitations for mailing to the selected vendors.
- Receiving and recording the bids returned from the vendors.
- Awarding the contract(s) and drafting the Purchase Order(s).

\* NOTE: If the Procurement Method is not Bid Procedure, skip to [7.4 - Drafting the Purchase Order](#).

### 7.3.1 INVITATION TO BID

Invitation to Bid is the process by which you invite the selected vendors to bid for the items you want to purchase. To start the process:

- Click on the links under the “Requisitions” section in the sidebar. Click on one of the “Assigned To Me” lists to display all Requisitions that have been assigned to you.

The screenshot shows the CUNY e-Procurement system interface. On the left is a sidebar with navigation options: HELP, REQUISITIONS (with sub-options for search and assigned lists), BID INVITATIONS (ITB), and PURCHASE ORDERS. The main content area is titled 'Requisitions Assigned To Me - By Department' and contains a table of requisitions. The table has columns for Dept Assigned, Requester, Req #, FAS Description, Delivery Date, and Total. Two requisitions are listed under the 'OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)' department. Navigation links like 'Collapse', 'Expand', 'Previous', 'Next', and 'Search' are visible above and below the table.

Dept Assigned	Requester	Req #	FAS Description	Delivery Date	Total
▼ OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)					
04/25/2008	Marc White3	<a href="#">1148003</a>	EPS-Bar Code Color		\$400.00
11/20/2006	Marc White3	<a href="#">1147035</a>	EPS-item # 1		\$36.00

- In the “By Status” list, select from the drop-down by **Assigned**.
  - Click on the **Requisition number** (displayed in blue).
  - Click the “Edit Info” button in the Requisition, and then click the “Invitation to Bid” button.

# CUNY e-PROCUREMENT SYSTEM (EPS)

**CUNY** The City University of New York

e-Procurement

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**REQUISITIONS**

Search For Requisitions

Assigned To Me

Created By Me

By Status

For Purchasing Group

Other Requisition Lists

Closed/Cancelled Over 90 Days (Archived)

**BID INVITATIONS (ITB)**

Search For ITBs

By Bid Number

**PURCHASE ORDERS**

Search For POs

Assigned To Me

By Status

With Attached Invoice

## Requisitions By Status Assigned

Select Requisition Status:

[Search](#)

Dept	Date	Req #	Requester	FAS Desc	Total	x-ref PO #	x-ref B
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	04/25/2008	<a href="#">1148003</a>	Marc White3	EPS-Bar Code Color	\$400.00		
Buyer: Purch1 UserUAO							
OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	11/20/2006	<a href="#">1147035</a>	Marc White3	EPS-item # 1	\$36.00		ITB8240
Buyer: Purch1 UserUAO							

[Search](#)

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**REQUISITIONS**

Search For Requisitions

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Other Requisition Lists

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**BID INVITATIONS (ITB)**

Search For ITBs

By Bid Number

**PURCHASE ORDERS**

Search For POs

Assigned To Me

By Status

With Attached Invoice

## University Management & Programs Requisition

Fields marked with \* are required

**Status:** Assigned
**Req #:** 1148003

**Bid #:** ITB8240018

**Req Date:** 04/25/2008
 **Fiscal Year:** 08

**Requester Information**

<b>College Name:</b> University Management & Programs	<b>College #:</b> 24
<b>Dept. Name:</b> OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b> 114
<b>Room #:</b> N/A	<b>Office Location:</b> 230 West 41st St.
<b>Phone #:</b> 212-397-5605	<b>Fax #:</b>
<b>Ship To:</b> The City University Of New York 230 West 41st St., 9th Floor New York, NY 10036 Attn: Marc White	
<b>Direct Questions To:</b> Marc White, Phone #-212-397-5605	

**Vendor Information**

[NYS Office of General Services](#)
[GSA Contracts](#)
[StaplesLink.com](#)

## CUNY e-PROCUREMENT SYSTEM (EPS)

The **Invitation to Bid (ITB)** form is divided into 4 sections:

1. **Receive Bids** – Contains information such as the date/time when bids should be received; date/time of when questions regarding the bids should be received; delivery date; contact information of where bids are due, and college address. The fields marked with (\*) are required.

NOTE: Bid Due Location is already populated with the Purchasing Department information, but can be modified.

2. **Line Items** – Contains information of the item(s) you want to purchase. Once the bid is done, a Vendor ID would be populated with the total amount. Comments could also be entered, which will display underneath all items in the ITB.

Description of Material/Service	Quantity	Unit	Price	Amount	Commodity	Vendor ID
<a href="#">Bar Code Color Printer</a>	1	EACH	\$0	\$0	96603000000	
				<b>Total Amount For All Items: \$0</b>		

Line Item Comments: (Displays after all line items in ITB)

## CUNY e-PROCUREMENT SYSTEM (EPS)

- Mail Merge Files** – This is the information that would be sent to the vendors in order for them to start the bidding. This is a downloadable executable file that includes a mail merge template to generate ITBs, vendor information, and a mailing label template to generate mailing labels. Before creating the file, click on the “Bid Opening Sheet” button and enter a description in the Bid Opening Sheet. Make sure that you have entered all the vendors that you would like to include in the bidding.

**University Management & Programs  
Bid Opening Sheet**

Fields marked with \* are required Print Preview

Bid #: ITB8240019 Req #: 1148007  
College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Bid Opening Date: 05/05/2008 Bid Opening Time: 3:00 PM

\* Description:

Total # of Packages Sent: 1 Total # of Packages Received: 0

**Vendors** Add Vendor

Vendor Name	Vendor ID	Total Bid Amt	Awarded Amt
1. <a href="#">A.F.M. PRINTING EQUIPMENT &amp; SUPPLIES</a>	112704680	no response	\$0

**Comments** Save Comments

Click the “Add Vendor” button to include more vendors in the bidding process. To edit a vendor, click on the highlighted vendor name (in blue).

Complete the Bid Opening Sheet Vendor form:

- Click the “Select Vendor” button to select vendor information from a list.
- Enter the vendor name or enter the first letters of the vendor name to search for the vendor in the “Search by Name” field and click “Go”.
- Click on the vendor name. The vendor form is populated with the vendor information. NOTE: Leave the “Total Bid Amt” field empty, the purchasing department will enter the bid amount received once the vendor replies back.
- Click the “Save and Add Vendor” button to save and add more vendors. Click the “Save and Close” button to save and go back to the previous Bid Opening Sheet form. Click the “Close” button to go back to the previous form without saving.
- The Bid Opening Sheet includes the list of vendors. Before bidding starts, notice that “Total Bid Amount” says “No response” and “Awarded Amt” has \$0. Comments can be added.

## CUNY e-PROCUREMENT SYSTEM (EPS)

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Password    Logout

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Assigned To Me

Created By Me

Require My Approval

Require Tech Approval

By Status

For Purchasing Group

Other Requisition Lists

Closed/Cancelled Over 90 Days (Archived)

BID INVITATIONS (ITB)

Search For ITBs

By Bid Number

PURCHASE ORDERS

Search For POs

### Bid Opening Sheet Vendor

Fields marked with \* are required

**Bid #:** ITB8240019

**\* Vendor Name:**  [Select Vendor](#)      **\* Vendor ID:**   
Enter "NA" if there is no Vendor ID Number

**Contact Name:**

**\* Addr Line 1:**

**Addr Line 2:**

**\* City:**       **\* State:**       **\* Zip:**

**Phone #:**       **Fax #:**       **Bus. Type:**

**Notation:**

**Total Bid Amt:** \$       **Awarded Amt:** \$0  
Enter "no bid" or a vendor bid amount

When you are finished editing the Bid Opening Sheet, click the “Save” button to return to the Invitation To Bid form. To create the executable file with all vendor information, click on the “Create Mail Merge Files” button.

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BID INVITATIONS (ITB)

Search For ITBs

By Bid Number

PURCHASE ORDERS

Search For POs

### University Management & Programs Invitation To Bid

Fields marked with \* are required

**Bid #:** ITB8240019      **Req #:** [1148007](#)

**Date Created:** 04/28/2008

**College Name:** University Management & Programs      **College #:** 24

**Dept. Name:** OFFICE OF THE UNIVERSITY CONTROLLER      **Dept. #:** 114

**Receive Bids**

**\* Before:**       **\* Time:**

**\* Questions Received Before:**       **\* Time:**

**Delivery Date - On Or Before:**

**Send Questions To:** Purch1 UserJAO/CENTRALOFFICE/CUNY

**Phone #:** (212) 345-1234      **FAX #:** (212) 456-5678

**Bid Due Location:**

**\* Address 1:**

## *CUNY e-PROCUREMENT SYSTEM (EPS)*

- After you click on the button, you will see the Mail Merge Files Section. Follow the instructions on the right hand side to download the file and to run the macros that will generate the invitation to bid forms pre-populated with the vendor information you supplied. There are 2 macros that need to be run – one to generate the bid forms using the ITB template, and one to generate mailing labels to be used for mailing the “Invitation to bid” forms.

### Mail Merge Files

Download Link:	How To Download The File And Perform The Mail Merge:
<a href="#">Download Mail Merge Files</a>	<p>This self-extracting archive file ( <a href="#">ITB_MailMergeArchive_ITB8240019.exe</a> ) contains files used to perform a Microsoft Word mail merge for this Invitation To Bid.</p> <p>Click on the "Download Mail Merge Files" link to download the file to your PC. You must <b>SAVE</b> the file to your PC, <b>DO NOT RUN</b> it from the browser. For example, you can save the file to the C:\TEMP directory.</p> <p>After downloading the archive file to your PC, double click on the file to extract the Word mail merge template, mailing label template, data source and macro files. <b>DO NOT</b> open the archive file in Microsoft Word, the file you will use is the ITB mail merge template file ( <a href="#">ITB_Mail Merge Template_ITB8240019.htm</a> ).</p> <p>Before opening the ITB mail merge template in Microsoft Word, make sure that Word Macro Security is set to Medium (from Word menu: Tools, Options, Security, Macro Security). Open the mail merge template file in Word ( <a href="#">ITB_Mail Merge Template_ITB8240019.htm</a> ). Click the "Yes" button when asked if you want to download files for the Web page (this loads the macro code associated with the template), and then click the "Enable Macros" button to allow the mail merge macro to run.</p> <p>Select "Tools", "Macro", "Macros" from the Word menu and then run the "Bid_Invitation_Mail_Merge" macro, which will ask you to select the data source file ( <a href="#">ITB_Mail Merge Data_ITB8240019.txt</a> ). The macro will then generate the mail merge document for you. You can also use the mailing label template ( <a href="#">ITB_Mailing Label Template_Avery5161.htm</a> ) to generate mailing labels using the data source file.</p>

4. **Comments/ File Attachments** – Comments can be entered and files can be attached that are related to the bidding process. The history section shows the cycle of the bidding process.

### Comments

[Save Comments](#)

Date - Initials:	Comments:
04/28/2008 - MW	The requester needs this printer for printing bar codes for tagging items

### File Attachments

[Save Attachment](#)

Enter Attachment:  [Browse...](#) [Help](#)

**NOTE:** If the file name you are entering contains apostrophe ( ' ) or pound ( # ) characters, please remove them from the file name before attaching the file to this document.

## CUNY e-PROCUREMENT SYSTEM (EPS)

### 7.3.2 RECEIVING BIDS

Once bids are received, we need to record this information. The Purchasing Department determines which line item(s) are going to be purchased from which vendor(s) depending on the biddings received.

To enter the bid amounts received:

- Click on the links under the “Requisitions” section in the sidebar, find your Requisition and click on the **Requisition number** (displayed in blue). Click on the “Invitation To Bid” button in the Requisition.
- OR -
- Click on the “By Bid Number” link under the “Bid Invitations” section in the sidebar and click on the **Invitation To Bid** number (displayed in blue).
- In the Invitation To Bid form:
  - Click on the “Bid Opening Sheet” button.
  - Click the “Edit Info” button to update the vendor(s) section with the total bid amounts received and the amount awarded to each vendor(s).

The screenshot displays the 'University Management & Programs Invitation To Bid' interface. On the left is a sidebar with navigation options like 'e-Procurement', 'REQUISITIONS', and 'BID INVITATIONS (ITB)'. The main content area shows the following details:

<b>Bid #:</b>	ITB8240019	<b>Req #:</b>	<a href="#">1148007</a>
<b>Date Created:</b>	04/28/2008		
<b>College Name:</b>	University Management & Programs	<b>College #:</b>	24
<b>Dept. Name:</b>	OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b>	114

Buttons for 'Edit Info' and 'Bid Opening Sheet' are visible. Below the main details is a 'Receive Bids' section:

<b>Before:</b>	05/05/2008	<b>Time:</b>	3:00 PM
<b>Questions Received Before:</b>	05/02/2008	<b>Time:</b>	2:00 PM
<b>Delivery Date - On Or Before:</b>			
<b>Send Questions To:</b>	Purch1 UserUAO/CENTRALOFFICE/CUNY		
<b>Phone #:</b>	(212) 345-1234	<b>FAX #:</b>	(212) 456-5678
<b>Bid Due Location:</b>			
<b>Address 1:</b>	CUNY Contracts Department		
<b>Address 2:</b>	555 West 57th Street		

## CUNY e-PROCUREMENT SYSTEM (EPS)

- Click on the vendor name (displayed in blue).



**e-Procurement**

**HELP**

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[EPS Enhancements](#)  
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**REQUISITIONS**

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[Assigned To Me](#)  
[Created By Me](#)  
[Require My Approval](#)  
[Require Tech Approval](#)  
[By Status](#)  
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[Closed/Cancelled Over 90 Days \(Archived\)](#)

**BID INVITATIONS (ITB)**

[Search For ITBs](#)  
[By Bid Number](#)

**PURCHASE ORDERS**

[Search For POs](#)

### University Management & Programs Bid Opening Sheet

Fields marked with \* are required

**Bid #:** ITB8240019      **Req #:** 1148007  
**College Name:** University Management & Programs      **College #:** 24  
**Dept. Name:** OFFICE OF THE UNIVERSITY CONTROLLER      **Dept. #:** 114  
**Bid Opening Date:** 05/05/2008      **Bid Opening Time:** 3:00 PM

**\* Description:**

**Total # of Packages Sent:** 2      **Total # of Packages Received:** 0

**Vendors**

Vendor Name	Vendor ID	Total Bid Amt	Awarded Amt
1. <a href="#">A.F.M. PRINTING EQUIPMENT &amp; SUPPLIES</a>	112704680	no response	\$0
2. <a href="#">DIGITAL PRINTING</a>	202609503	no response	\$0

**Comments**

- Complete the “Total Bid Amt” field with the response from the vendor. Click “Save and Close” to go back to the previous page. Click the “Close” button until you go back to the Invitation to Bid form.



**e-Procurement**

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**REQUISITIONS**

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**BID INVITATIONS (ITB)**

[Search For ITBs](#)  
[By Bid Number](#)

**PURCHASE ORDERS**

[Search For POs](#)

### Bid Opening Sheet Vendor

Fields marked with \* are required

**Bid #:** ITB8240019

**\* Vendor Name:**        **\* Vendor ID:**   
Enter "NA" if there is no Vendor ID Number

**Contact Name:**

**\* Addr Line 1:**

**Addr Line 2:**

**\* City:**       **\* State:**       **\* Zip:**

**Phone #:**       **Fax #:**       **Bus. Type:**

**Notation:**

**Total Bid Amt:** \$       **Awarded Amt:** \$0  
Enter "no bid" or a vendor bid amount

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 7.3.3 AWARDING THE BID

Once the bid(s) have been received, you will need to edit the Invitation To Bid (ITB) form and award the line item(s) to the vendor(s).

- In the ITB form, scroll down to the “Line Items” section and click on the description of the line item (displayed in blue).

Description of Material/Service	Quantity	Unit	Price	Amount	Commodity	Vendor ID
<a href="#">Bar Code Color Printer</a>	1	EACH	\$0	\$0	96603000000	

Total Amount For All Items: \$0

Line Item Comments: (Displays after all line items in ITB)

- Enter the awarded amount and enter the “Awarded Vendor” info. by clicking on the “Select Vendor” button.

**Invitation To Bid Item**

Fields marked with \* are required

\* Description:  \* Quantity:

\* Price:  \* Unit:

\* Technology Category:

\* Commodity Information:

Code:	Description:
<input type="text" value="96603000000"/>	<input type="text" value="Bar Code Printing"/>

Awarded Vendor:

Name:	ID:
<input type="text"/>	<input type="text"/>

## CUNY e-PROCUREMENT SYSTEM (EPS)

- A window pops up with the vendors that replied with bids. Click on the vendor(s) you want to award the bid(s) to. The “Invitation to Bid Item” form is updated with the vendor information. Click the “Save and Close” button to save the information.

### Select Bid Opening Sheet Vendor

	Vendor Name	Vendor ID	Total Bid Amt
1.	<a href="#">A.F.M. PRINTING EQUIPMENT &amp; SUPPLIES</a>	112704680	\$385.00

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- REQUISITIONS**
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- Assigned To Me
- Created By Me
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- Require Tech Approval
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- Closed/Cancelled Over 90 Days (Archived)
- BID INVITATIONS (ITB)**
- Search For ITBs
- By Bid Number
- PURCHASE ORDERS**
- Search For POs
- Assigned To Me
- By Status
- With Attached Invoice
- For Accounts Payable
- Other PO Lists
- Older Than Two Fiscal Years (Archived)
- FIXED ASSETS**
- Search For Fixed Assets

### Invitation To Bid Item

Fields marked with \* are required

**\* Description:**

Bar Code Color Printer

**\* Quantity:**

**\* Price:** \$

**\* Unit:**

**\* Technology Category:**

**\* Commodity Information:**

Code:	Description:
<input type="text" value="96603000000"/>	<input type="text" value="Bar Code Printing"/>

**Awarded Vendor:**

Name:	ID:
<input type="text" value="A.F.M. PRINTING EQUIPMENT &amp; SUPPLIES"/>	<input type="text" value="112704680"/>

## CUNY e-PROCUREMENT SYSTEM (EPS)

- After saving the item, the Vendor ID is updated with the vendor you awarded the item to. Click on the vendor id (displayed in blue) to see the information for that vendor. Notice the “Awarded Amt”.

### Line Items

Add Item

Description of Material/Service	Quantity	Unit	Price	Amount	Commodity	Vendor ID
<a href="#">Bar Code Color Printer</a>	1	EACH	\$385.00	\$385.00	96603000000	<a href="#">112704680</a>
				<b>Total Amount For All Items:</b>	\$385.00	

Line Item Comments: (Displays after all line items in ITB)

### Bid Opening Sheet Vendor

**Bid #:** ITB8240019

**Vendor Name:** A.F.M. PRINTING EQUIPMENT & SUPPLIES

**Vendor ID:** 112704680

**Contact Name:** JOHN MANGIUNE/ PRESIDENT

**Addr Line 1:** 14 CONNOR LANE

**City:** DEER PARK

**State:** NY

**Zip:** 11729

**Phone #:** 516-254-9114

**Fax #:** 516-254-9126

**Bus. Type:** SMB

**Total Bid Amt:** \$385.00

**Awarded Amt:** \$385.00

Close

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 7.4 DRAFTING THE PURCHASE ORDER

After the Purchase Order is assigned to the buyer, it is reviewed and submitted to the vendor. If the Procurement Method was Bid Procedure, then the Purchase Order(s) can be submitted after the vendor(s) reply back with their bid(s) and the line item(s) are awarded. Once submitted, a PO # is assigned and the Purchase Order can be tracked via the “Purchase Orders” sidebar options.

To draft a Purchase Order:

- Click on the links under the “Requisitions” section in the sidebar.
  - Find your Requisition and click on the **Requisition number** (displayed in blue).
  - Click on the “Edit Info” button.

**University Management & Programs Requisition**

Fields marked with \* are required

[Invitation To Bid](#) [Print Preview](#)

Status: **Assigned** Req #: 1148003  
Bid #: ITB8240018  
Req Date: 04/25/2008 Fiscal Year: 08

**Requirer Information**

College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Room #: N/A Office Location: 230 West 41st St.  
Phone #: 212-397-5605 Fax #:  
Ship To: The City University Of New York  
230 West 41st St., 9th Floor  
New York, NY 10036  
Attn: Marc White  
Direct Questions To: Marc White, Phone #:212-397-5605

**Vendor Information** [NYS Office of General Services](#) [GSA Contracts](#) [StaplesLink.com](#)

- Scroll down and click “Draft the Purchase Order” button to draft the PO.

### File Attachments

[Save Attachment](#)

Enter Attachment:

[Browse...](#)

[Help](#)

**NOTE:** If the file name you are entering contains apostrophe ( ' ) or pound ( # ) characters, please remove them from the file name before attaching the file to this document.

<input type="checkbox"/> <a href="#">test1.txt</a>
<input type="checkbox"/> <a href="#">test2.txt</a>
<a href="#">Check All</a> - <a href="#">Clear All</a> <a href="#">Delete Files</a>

Re-Assign To:  (Currently assigned to Purch1 UserUAO/CENTRALOFFICE/CUNY)

[Draft the Purchase Order](#)

[Re-Assign Requisition](#)

[Save And Close](#)

[Cancel Requisition](#)

[Close](#)

## CUNY e-PROCUREMENT SYSTEM (EPS)

- The following pop-up window is displayed informing you that the Requisition will be closed and replaced by a Purchase Order. To continue, click OK.



- The Purchase Order form is redisplayed with the status of "Draft".

A screenshot of the "University Management & Programs Purchase Order" form. The form is displayed in a web browser window. On the left is a navigation menu with categories like REQUISITIONS, BID INVITATIONS (ITB), PURCHASE ORDERS, and FIXED ASSETS. The main content area shows the following information:  
**Requisition Information:**  
Status: **Draft**  
Date: 04/28/2008 \* Fiscal Year: 08  
Req #: 1148003  
Bid #: ITB8240018  
**Requester Information:**  
College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Room #: N/A Office Location: 230 West 41st St.  
Phone #: 212-397-5605 Fax #:  
Address: The City University Of New York  
230 West 41st St., 9th Floor  
New York, NY 10036  
Attn: Marc White  
Direct Questions To: Marc White, Phone #:212-397-5605  
**Vendor Information:**  
Commodity Type: SUPPLIES & EQUIPMENT(OFFSET). PRINTING PRSUEQ

**NOTE:** If an Invitation To Bid (ITB) was created for the Requisition, a draft PO will be created for each vendor that has been awarded line items in the ITB.

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 7.5 SUBMITTING THE PURCHASE ORDER

Once the purchase order becomes a Draft, the FAS information needs to be completed in order for the PO to be submitted to FAS.

To submit a Purchase Order:

- Click on the links under the “Purchase Orders” section in the sidebar. The “Assigned to me” list displays all POs that have been assigned to you.
- The “By Status” list displays all POs categorized by status.
  - Find your Purchase Order by expanding the Draft category by clicking on the arrows in the list.
  - Click on the “N.A.” link (displayed in blue).
  - Click on the “Edit Info” button.

**Purchase Orders By Status**

[Collapse](#)   [Expand](#)   [Previous](#)   [Next](#)   [Search](#)

Status	Dept	Date	Requester	PO #	Total	x-ref Req #	x-ref Bid #
▼ <b>Draft</b>							
	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)						
		04/28/2008	Marc White3	<a href="#">N.A.</a>	\$385.00	1148007	ITB8240019
	UNIVERSITY CONTRACTING OFFICE. (2-173-00)						
▶ <b>Received In AP</b>							
▶ <b>Submitted</b>							
▶ <b>Insufficient Funds</b>							
▶ <b>FAS Conflict</b>							
▶ <b>Cancelled in FAS</b>							

[Collapse](#)   [Expand](#)   [Previous](#)   [Next](#)   [Search](#)

## CUNY e-PROCUREMENT SYSTEM (EPS)

**NOTE:** There is a reference link to the Requisition number and the Bid (ITB) number.

**CU NY** The City University of New York  
e-Procurement  
Password Logout  
Create Requisition

**University Management & Programs Purchase Order** [Edit Info](#)

Status: **Draft** Req #: [1148007](#)  
Date: 04/28/2008 Fiscal Year: 08 Bid #: [ITB8240019](#)

**Requester Information**

College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Room #: N/A Office Location: 230 West 41st St.  
Phone #: 212-397-5605 Fax #:  
Address: The City University Of New York  
230 West 41st St., 9th Floor  
New York, NY 10036  
Attn: Marc White  
Direct Questions To: Marc White, Phone #-212-397-5605

**Vendor Information** [NYS Office of General Services](#) [GSA Contracts](#) [StaplesLink.com](#)

Commodity Type: SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

- Clicking on the Req # link displays the Requisition information. Notice that the status is “Closed”.

**CU NY** The City University of New York  
e-Procurement  
Password Logout  
Create Requisition

**University Management & Programs Requisition** [Resubmit Req](#) [Invitation To Bid](#) [Print Preview](#)

Status: **Closed** Req #: 1148007  
Bid #: ITB8240019  
Req Date: 04/28/2008 Fiscal Year: 08

**Requester Information**

College Name: University Management & Programs College #: 24  
Dept. Name: OFFICE OF THE UNIVERSITY CONTROLLER Dept. #: 114  
Room #: N/A Office Location: 230 West 41st St.  
Phone #: 212-397-5605 Fax #:  
Ship To: The City University Of New York  
230 West 41st St., 9th Floor  
New York, NY 10036  
Attn: Marc White  
Direct Questions To: Marc White, Phone #-212-397-5605

**Vendor Information** [NYS Office of General Services](#) [GSA Contracts](#) [StaplesLink.com](#)

Commodity Type: SUPPLIES & EQUIPMENT(OFFSET), PRINTING [ PRSUEQ ]

## CUNY e-PROCUREMENT SYSTEM (EPS)

- Clicking on the Bid # link displays the Bid information. There is also a link to the Requisition from this form.

The screenshot displays the CUNY e-Procurement system interface. On the left is a navigation menu with categories like HELP, REQUISITIONS, BID INVITATIONS (ITB), and PURCHASE ORDERS. The main content area is titled "University Management & Programs Invitation To Bid" and includes buttons for "Edit Info" and "Bid Opening Sheet".

**University Management & Programs  
Invitation To Bid**

[Edit Info](#) [Bid Opening Sheet](#)

<b>Bid #:</b>	ITB8240019	<b>Req #:</b>	<a href="#">1148007</a>
<b>Date Created:</b>	04/28/2008		
<b>College Name:</b>	University Management & Programs	<b>College #:</b>	24
<b>Dept. Name:</b>	OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b>	114

**Receive Bids**

<b>Before:</b>	05/05/2008	<b>Time:</b>	3:00 PM
<b>Questions Received Before:</b>	05/02/2008	<b>Time:</b>	2:00 PM
<b>Delivery Date - On Or Before:</b>			
<b>Send Questions To:</b>	Purch1 UserJAO/CENTRALOFFICE/CUNY		
<b>Phone #:</b>	(212) 345-1234	<b>FAX #:</b>	(212) 456-5678

**Bid Due Location:**

<b>Address 1:</b>	CUNY Contracts Department
<b>Address 2:</b>	555 West 57th Street

## CUNY e-PROCUREMENT SYSTEM (EPS)

### 7.5.1 COMPLETING THE PURCHASE ORDER FORM

The purchase order form has 6 sections – Requester; Vendor Information; Line Items; FAS and Other Info; Comments; and File Attachments sections. The Requester, Vendor Information, and Line Items sections are already completed. The FAS and Other Info section needs to be completed in order for the PO to be submitted.

**NOTE:** Fields marked with (\*) are required.

#### A. REQUESTER INFORMATION Section

##### Requester Information

<b>College Name:</b>	University Management & Programs	<b>College #:</b>	24
<b>Dept. Name:</b>	OFFICE OF THE UNIVERSITY CONTROLLER	<b>Dept. #:</b>	114
<b>Room #:</b>	N/A	<b>Office Location:</b>	230 West 41st St.
<b>Phone #:</b>	212-397-5605	<b>Fax #:</b>	
<b>Address:</b>	The City University Of New York 230 West 41st St., 9th Floor New York, NY 10036 Attn: Marc White		
<b>Direct Questions To:</b>	Marc White, Phone #:212-397-5605		

#### B. VENDOR INFORMATION Section

The vendor information can be edited – Select / Remove a vendor.

##### Vendor Information

[NYS Office of General Services](#) [GSA Contracts](#) [StaplesLink.com](#)

<b>Commodity Type:</b>	SUPPLIES & EQUIPMENT(OFFSET), PRINTING	PRSUEQ
<b>Select Vendor</b>	<b>Remove Vendor</b>	
<b>* Vendor Name:</b>	A.F.M. PRINTING EQUIPMENT & S	<b>* Vendor ID:</b> 112704680
<b>Contact Name:</b>	JOHN MANGIUNE/ PRESIDENT	
<b>* Addr Line 1:</b>	14 CONNOR LANE	
<b>Addr Line 2:</b>		
<b>* City:</b>	DEER PARK	<b>* State:</b> NY
<b>Phone #:</b>	516-254-9114	<b>* Zip:</b> 11729
	<b>Fax #:</b> 516-254-9126	<b>Bus. Type:</b> SMB

## CUNY e-PROCUREMENT SYSTEM (EPS)

### C. LINE ITEMS Section

The item information can be edited by clicking on the description (in blue). You can also add items and add comments that will appear below all line items.

Line Items Add Item

Description of Material/Service	Commodity	Quantity	Unit	Price	Amount	Category
<a href="#">Bar Code Color Printer</a>	96603000000	1	EACH	\$385.00	\$385.00	<input type="checkbox"/>

Total Amount For All Items: \$385.00

Line Item Comments: (Displays after all line items in PO)

### D. FAS AND OTHER INFO Section

The fields marked with (\*) are required in order for the PO to be posted to FAS.

FAS and Other Info.

Processing Option:

\* Procurement Method:

Proc Method Contract #:  State Commodity Group #:

Transportation Charges: \$

F.O.B.:  Other:

Has Attached Invoice?  Yes  No

Delivery Applicable?  Yes  No  
("No" = No Receiving Report)

Delivery Date:

Annual/Continuous:  Yes  No

Memorandum Of Understanding:  Yes  No

Originating Agency Code:  Originating Agency Title: University Management & Programs

\* Expense Code:

\* Program Code:  Major Purpose:

\* Action:  \* Line #:  \* Batch Type:

## CUNY e-PROCUREMENT SYSTEM (EPS)

- **Bid Questionnaire Form** – allows entry of information specific to the vendor and its certification. Click on the “Edit” button to complete. The completed information is added to the Purchase Order form.

### Bid Questionnaire

	VENDOR CODE	NO. OF BIDS SENT	NO. OF RESPONSES
SMALL BUS	SMB	<input style="width: 40px;" type="text" value="2"/>	<input style="width: 40px;" type="text" value="1"/>
MINORITY	MIB	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
WOMEN	WOB	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
BOTH M/W	MWB	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
STATE/CITY/BOTH CERTIFIED			
MINORITY	BCM	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
WOMEN	BCW	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
BOTH M/W	BCB	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>
NONE OF THE ABOVE	NOB	<input style="width: 40px;" type="text"/>	<input style="width: 40px;" type="text"/>

100% (ALL) Certified Minorities?  Yes  No

100% (ALL) Certified Women?  Yes  No

- **Utilization Plan Form** – allows entry of information specific to the purchase order. Click on the “Edit” button to complete. The completed information is added to the Purchase Order form.

## CUNY e-PROCUREMENT SYSTEM (EPS)

### Utilization Plan

Contract Award Date:

Estimated Date of Completion:

VENDOR CODE	VENDOR NO.	AMOUNT
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Description Of Work:

**NOTE: You will be asked to certify a report that the Vendor complied with the Utilization Plan**

### E. COMMENTS / FILE ATTACHMENTS Section

Comments and file attachments for the purchase order can be entered here.

Comments

Date - Initials:	Comments:
04/28/2008 - MW	Printer for printing bar codes to tag items

File Attachments

Enter PO Attachment:   [Help](#)

**NOTE:** If the file name you are entering contains apostrophe ( ' ) or pound ( # ) characters, please remove them from the file name before attaching the file to this document.

Requisition File Attachments:

[test1.bt](#)

[test2.bt](#)

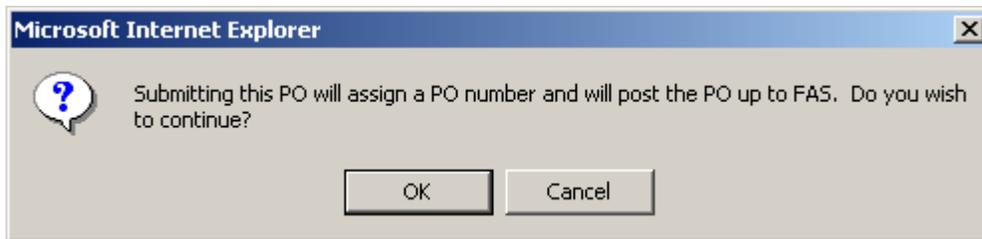
## ***CUNY e-PROCUREMENT SYSTEM (EPS)***

- Once everything is completed, the PO is ready to be submitted. Click on the “Submit PO” button to submit. If all the information is not yet completed, click on the “Save as Draft” button. Click on the “Delete PO” button to delete the PO, or “Close” button to exit the form without saving the changes. The history of the PO life-cycle is displayed.

### History:

Name:	Date:	Status	Comments:
Marc White3	04/28/2008 04:09:00 PM	Draft	Drafted PO
Marc White3	04/28/2008 04:11:25 PM	Draft	Saved Purchase Order as a draft
Marc White3	04/28/2008 04:16:48 PM	Draft	Bid Questionnaire information was saved
Marc White3	04/28/2008 04:16:56 PM	Submitted	Submitted PO (PO # 8244006). Accounting team is ACCOUNTSPAYABLE24 - UCO

- When the “Submit PO” button is clicked, the following pop-up window is displayed. To continue, click the OK button.



NOTE: If you choose to click the Cancel button, you will be returned to the previous screen.

## CUNY e-PROCUREMENT SYSTEM (EPS)

- If there are any required fields that have not been completed, a pop-up window similar to the following is displayed listing the items required.

**NOTE:** The PO cannot be submitted until all required fields are entered (marked with \*).



- When the Purchase Order is submitted, the information is sent to the Financial Accounting System (FAS). If any errors are encountered in FAS, the following screen is displayed, describing the error and stating that it must be corrected before further action can take place.



## ***CUNY e-PROCUREMENT SYSTEM (EPS)***

- When all errors have been resolved, a pop-up window is displayed confirming that the Purchase Order has been finalized. Click “OK” to continue.



# CUNY e-PROCUREMENT SYSTEM (EPS)

## 8.0 FIXED ASSETS

Purchase Orders for Fixed Assets can be viewed and edited by the Fixed Asset group in the same way as the other Purchase Orders.

These POs can be accessed through the “Purchase Orders” section, or through the “Fixed Assets” section of the sidebar by:

- “Expense Code” - displays a list of Fixed Asset Purchase Orders sorted by Expense Code.

Require Tech Approval	<b>Fixed Assets By Expense Code</b>					
By Status	<a href="#">Collapse</a> <a href="#">Expand</a> <a href="#">Previous</a> <a href="#">Next</a> <a href="#">Search</a>					
For Purchasing Group	Exp Code	PO #	Requester	Date	Dept	Total
Other Requisition Lists	<a href="#">▼</a> 309 [ EDP EQUIP. INVENTORIAL VARIOUS ]					
Closed/Cancelled Over 90 Days (Archived)	<a href="#">8243012</a> Appr3 UserUAO 03/04/2008 OFFICE OF THE UNIVERSITY CONTROLLER \$148.08					
<b>BID INVITATIONS (ITB)</b>	<a href="#">8243013</a> Appr3 UserUAO 03/04/2008 OFFICE OF THE UNIVERSITY CONTROLLER \$204.50					
Search For ITBs	<a href="#">▼</a> 309 [ INVENTORIAL - PC ]					
By Bid Number	<a href="#">8243009</a> Avg1 UserUAO 02/28/2008 OFFICE OF THE UNIVERSITY CONTROLLER \$755.00					
<b>PURCHASE ORDERS</b>	<a href="#">▼</a> 309 [ INVENTORIAL - PRINTER ]					
Search For POs	<a href="#">8243011</a> Marc White3 03/03/2008 IFR-UAPC \$200.00					
Assigned To Me	<a href="#">▼</a> 310 [ INVENTORIAL ASSET-SENSITIVE. ]					
By Status	<a href="#">8243010</a> Avg1 UserUAO 02/29/2008 OFFICE OF THE UNIVERSITY CONTROLLER \$255.50					
With Attached Invoice	<a href="#">Collapse</a> <a href="#">Expand</a> <a href="#">Previous</a> <a href="#">Next</a> <a href="#">Search</a>					
For Accounts Payable						
Other PO Lists						
Older Than Two Fiscal Years (Archived)						
<b>FIXED ASSETS</b>						
Search For Fixed Assets						
By Expense Code						
By PO Number						
<b>RECEIVING REPORTS</b>						
Search For Recvng Rpts						
All By PO Number						
Other Recvng Rpt Lists						
Older Than Two Fiscal Years (Archived)						

## CUNY e-PROCUREMENT SYSTEM (EPS)

- “By PO Number” - displays a list of Fixed Asset Purchase Orders sorted PO number.

<div style="background-color: #f2f2f2; padding: 2px;">Require Tech Approval</div> <div style="background-color: #f2f2f2; padding: 2px;">By Status</div> <div style="background-color: #f2f2f2; padding: 2px;">For Purchasing Group</div> <div style="background-color: #f2f2f2; padding: 2px;">Other Requisition Lists</div> <div style="background-color: #f2f2f2; padding: 2px;">Closed/Cancelled Over 90 Days (Archived)</div> <div style="background-color: #f2f2f2; padding: 2px;">BID INVITATIONS (ITB)</div> <div style="background-color: #f2f2f2; padding: 2px;">Search For ITBs</div> <div style="background-color: #f2f2f2; padding: 2px;">By Bid Number</div> <div style="background-color: #f2f2f2; padding: 2px;">PURCHASE ORDERS</div> <div style="background-color: #f2f2f2; padding: 2px;">Search For POs</div> <div style="background-color: #f2f2f2; padding: 2px;">Assigned To Me</div> <div style="background-color: #f2f2f2; padding: 2px;">By Status</div> <div style="background-color: #f2f2f2; padding: 2px;">With Attached Invoice</div> <div style="background-color: #f2f2f2; padding: 2px;">For Accounts Payable</div> <div style="background-color: #f2f2f2; padding: 2px;">Other PO Lists</div> <div style="background-color: #f2f2f2; padding: 2px;">Older Than Two Fiscal Years (Archived)</div> <div style="background-color: #f2f2f2; padding: 2px;">FIXED ASSETS</div> <div style="background-color: #f2f2f2; padding: 2px;">Search For Fixed Assets</div> <div style="background-color: #f2f2f2; padding: 2px;">By Expense Code</div> <div style="background-color: #f2f2f2; padding: 2px;">By PO Number</div> <div style="background-color: #f2f2f2; padding: 2px;">RECEIVING REPORTS</div> <div style="background-color: #f2f2f2; padding: 2px;">Search For Recvng Rpts</div> <div style="background-color: #f2f2f2; padding: 2px;">All By PO Number</div> <div style="background-color: #f2f2f2; padding: 2px;">Other Recvng Rpt Lists</div> <div style="background-color: #f2f2f2; padding: 2px;">Older Than Two Fiscal Years (Archived)</div>	<div style="text-align: center; font-weight: bold; color: #000080;">Fixed Assets By PO Number</div> <div style="text-align: center; margin-top: 5px;"> <a href="#">Previous</a>                      <a href="#">Next</a>                      <a href="#">Search</a> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="text-align: left;">PO #</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">Requester</th> <th style="text-align: left;">Date</th> <th style="text-align: left;">Dept</th> <th style="text-align: right;">Total</th> </tr> </thead> <tbody> <tr> <td>8243013</td> <td><a href="#">Received In AP</a></td> <td>Appr3 UserUAO</td> <td>03/04/2008</td> <td>OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)</td> <td style="text-align: right;">\$204.50</td> </tr> <tr> <td>8243012</td> <td><a href="#">Received In AP</a></td> <td>Appr3 UserUAO</td> <td>03/04/2008</td> <td>OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)</td> <td style="text-align: right;">\$148.08</td> </tr> <tr> <td>8243011</td> <td><a href="#">Submitted</a></td> <td>Marc White3</td> <td>03/03/2008</td> <td>IFR-UAPC (3-293-20)</td> <td style="text-align: right;">\$200.00</td> </tr> <tr> <td>8243010</td> <td><a href="#">Received In AP</a></td> <td>Avg1 UserUAO</td> <td>02/29/2008</td> <td>OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)</td> <td style="text-align: right;">\$255.50</td> </tr> <tr> <td>8243009</td> <td><a href="#">Submitted</a></td> <td>Avg1 UserUAO</td> <td>02/28/2008</td> <td>OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)</td> <td style="text-align: right;">\$755.00</td> </tr> </tbody> </table> <div style="text-align: center; margin-top: 5px;"> <a href="#">Previous</a>                      <a href="#">Next</a>                      <a href="#">Search</a> </div>	PO #	Status	Requester	Date	Dept	Total	8243013	<a href="#">Received In AP</a>	Appr3 UserUAO	03/04/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	\$204.50	8243012	<a href="#">Received In AP</a>	Appr3 UserUAO	03/04/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	\$148.08	8243011	<a href="#">Submitted</a>	Marc White3	03/03/2008	IFR-UAPC (3-293-20)	\$200.00	8243010	<a href="#">Received In AP</a>	Avg1 UserUAO	02/29/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	\$255.50	8243009	<a href="#">Submitted</a>	Avg1 UserUAO	02/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	\$755.00
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# CUNY e-PROCUREMENT SYSTEM (EPS)

## 9.0 RECEIVING

### 9.1 FIRST TIME RECEIPT OF MERCHANDISE

When merchandise is received, someone in the Receiving Department accesses the EPS system to record the shipment.

To record the shipment:

- Under the “Receiving Reports” section in the sidebar – Select “All By PO Number”.
- Click on the PO number (displayed in blue).
- Click on the “Edit Info” button.

Require Tech Approval		Receiving Reports By PO Number				
By Status						
For Purchasing Group						
Other Requisition Lists		<a href="#">Previous</a> <a href="#">Next</a> <a href="#">Search</a>				
Closed/Cancelled Over 90 Days (Archived)		PO #	Requester ↕	Date ↕	Dept ↕	Status
BID INVITATIONS (ITB)		<a href="#">6500001</a>	Avg1 User65	08/22/2007	BUILDINGS & GROUNDS MAINTENANCE (2-177-01)	Closed
Search For ITBs		<a href="#">8240002</a>	Avg1 UserUAO	06/18/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
By Bid Number		<a href="#">8240003</a>	Avg1 UserUAO	06/25/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
PURCHASE ORDERS		<a href="#">8240004</a>	Marc White3	07/03/2007	UNIVERSITY CONTRACTING OFFICE. (2-173-00)	Open
Search For POs		<a href="#">8240005</a>	Avg1 UserUAO	07/09/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
Assigned To Me		<a href="#">8240007</a>	Marc White3	07/23/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
By Status		<a href="#">8240008</a>	Avg1 UserUAO	07/24/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
With Attached Invoice		<a href="#">8240009</a>	Avg1 UserUAO	07/24/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
For Accounts Payable		<a href="#">8240010</a>	Avg1 UserUAO	07/26/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
Other PO Lists		<a href="#">8240011</a>	Marc White3	07/26/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
Older Than Two Fiscal Years (Archived)		<a href="#">8240012</a>	Marc White3	07/26/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
FIXED ASSETS		<a href="#">8240014</a>	Avg1 UserUAO	07/31/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
Search For Fixed Assets		<a href="#">8240015</a>	Avg1 UserUAO	08/01/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
By Expense Code		<a href="#">8240017</a>	Marc White3	08/01/2007	UNIVERSITY CONTRACTING OFFICE. (2-173-00)	Closed
By PO Number		<a href="#">8240018</a>	Marc White3	08/02/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
RECEIVING REPORTS		<a href="#">8240019</a>	Marc White3	08/02/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
Search For Recvng Rpts		<a href="#">8240020</a>	Marc White3	08/02/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
All By PO Number		<a href="#">8240021</a>	Marc White3	08/02/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
Other Recvng Rpt Lists		<a href="#">8240022</a>	Marc White3	08/02/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
Older Than Two Fiscal Years (Archived)		<a href="#">8240023</a>	Avg1 UserUAO	08/08/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Closed
		<a href="#">8240024</a>	Marc White3	08/13/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
		<a href="#">8240026</a>	Marc White3	08/15/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open
		<a href="#">8240027</a>	Marc White3	08/17/2007	INVEST PROGRAM. (3-293-31)	Open
		<a href="#">8240028</a>	Marc White3	08/20/2007	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)	Open

## CUNY e-PROCUREMENT SYSTEM (EPS)

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Direct Questions To: Marc White, Phone #:212-397-5605																			

- Scroll down to the “Line Items” Section. Notice “Enter Quantity Of Merchandise Received” in red.

<b>Line Items</b>	<b>Enter Quantity Of Merchandise Received</b>						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Item No.</th> <th style="width: 70%;">Description of Material/Service</th> <th style="width: 20%;">Unit</th> </tr> </thead> <tbody> <tr> <td style="color: blue;"><a href="#">Enter Qty</a> 1.</td> <td>Bar Code Color Printer</td> <td>EACH</td> </tr> </tbody> </table>		Item No.	Description of Material/Service	Unit	<a href="#">Enter Qty</a> 1.	Bar Code Color Printer	EACH
Item No.	Description of Material/Service	Unit					
<a href="#">Enter Qty</a> 1.	Bar Code Color Printer	EACH					

## CUNY e-PROCUREMENT SYSTEM (EPS)

- Click on **Enter Qty** (displayed in blue, under “Item No.”) to edit the Receiving Report Item form. Record the information of merchandise received:
  - Date - The date items were received. Click the button next to the date entry box and select the date from the calendar (displayed in a pop-up window).
  - Qty – The total number of items received.
  - Prior Recvd – If the items arrive in different shipments, keeps track of what have been entered as received (calculated by the system).
  - Total – The total number of items received. The system automatically calculates the total amount by adding the “Qty” to the “Prior Received” field.
- Comments – You can enter comments regarding the item.
- Click the “Save and Close” button to save the data entered or “Close” to close without saving the data.

**Receiving Report Item**

Fields marked with \* are required.

Item #: 1

Description:  
Bar code color printer

\* Date:   \* Qty:  Prior Recvd: 0 Total:

Comments:

**Navigation Sidebar:**

- require recrApproval
- By Status
- For Purchasing Group
- Other Requisition Lists
- Closed/Cancelled Over 90 Days (Archived)
- BID INVITATIONS (ITB)**
- Search For ITBs
- By Bid Number
- PURCHASE ORDERS**
- Search For POs
- Assigned To Me
- By Status
- With Attached Invoice
- For Accounts Payable
- Other PO Lists
- Older Than Two Fiscal Years (Archived)
- FIXED ASSETS**
- Search For Fixed Assets
- By Expense Code
- By PO Number
- RECEIVING REPORTS**
- Search For Recvng Rpts
- All By PO Number
- Other Recvng Rpt Lists
- Older Than Two Fiscal Years (Archived)

## CUNY e-PROCUREMENT SYSTEM (EPS)

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- Search For Recvng Rpts
- All By PO Number
- Other Recvng Rpt Lists
- Older Than Two Fiscal Years (Archived)

### Receiving Report Item

Fields marked with \* are required.

Item #: 1

Description:  
Bar code color printer

\* Date:

Comments:

0      Total:

- The "Line Items" section in the Receiving Report form is updated with the data entered of the items received.

### Line Items

Item No.	Description of Material/Service	Unit
1.	Bar Code Color Printer	EACH

<b>Date:</b>	<b>Qty:</b>	<b>Prior Recvd:</b>	<b>Total:</b>
04/28/2008	1	0	1
<b>Comments:</b>			
Received the color printer			

# CUNY e-PROCUREMENT SYSTEM (EPS)

## 9.2 CENTRAL RECEIVING GROUP

If the Central Receiving group does not handle inventory, it can acknowledge receipt of merchandise and notify the requester (who can enter items as received) by clicking on the “Acknowledge Receipt And Notify Requester” button.

The screenshot shows the 'University Management & Programs Purchase Order Receiving Report' interface. On the left is a navigation menu with categories: HELP, REQUISITIONS, PURCHASE ORDERS, RECEIVING REPORTS, and USER PROFILE. The main content area features a title, a 'Print Preview' button, and a 'Requester Information' section. The 'Requester Information' section contains the following details:

Req #:	1148007	PO #:	<a href="#">8244006</a>
Date:	04/28/2008	Fiscal Year:	08
College Name:	University Management & Programs	College #:	24
Dept. Name:	OFFICE OF THE UNIVERSITY CONTROLLER	Dept. #:	114
Room #:	N/A	Office Location:	230 West 41st St.
Phone #:	212-397-5605	Fax #:	
Address:	The City University Of New York 230 West 41st St., 9th Floor New York, NY 10036 Attn: Marc White		
Direct Questions To:	Marc White, Phone #:212-397-5605		

Below the requester information is a 'Vendor Information' section which is currently empty.

## 9.3 SUBSEQUENT RECEIPT OF MERCHANDISE

Since a Purchase Order may not be satisfied in one shipment, EPS allows multiple receipts to be recorded. The process for entering additional receipts is the same as for the first shipment.

### NOTE:

- As long as **Enter Qty** is blue, receipts can be entered. If it is not blue, the recorded amount received is equal to or greater than the original amount ordered and the shipment could be an overage.
- “Prior Recvd” shows the amount of merchandise received in the prior shipment, and “Total” accumulates the amount of merchandise received over all shipments.

## CUNY e-PROCUREMENT SYSTEM (EPS)

### 9.4 COMPLETED RECEIPT OF MERCHANDISE

When all the merchandise have been received and recorded, the status of the PO changes to “Submitted - Closed”. Click on the PO # (displayed in blue) and notice the status “Submitted – Closed”.

By Status	Receiving Reports By PO Number					
Require Tech Approval	<a href="#">Previous</a>		<a href="#">Next</a>		<a href="#">Search</a>	
By Status						
For Purchasing Group						
Other Requisition Lists						
Closed/Cancelled Over 90 Days (Archived)						
<b>BID INVITATIONS (ITB)</b>						
Search For ITBs						
By Bid Number						
<b>PURCHASE ORDERS</b>						
Search For POs						
Assigned To Me						
By Status						
With Attached Invoice						
For Accounts Payable						
Other PO Lists						
Older Than Two Fiscal Years (Archived)						
<b>FIXED ASSETS</b>						
Search For Fixed Assets						
By Expense Code						
By PO Number						
<b>RECEIVING REPORTS</b>						
Search For Recvng Rpts						
All By PO Number						
Other Recvng Rpt Lists						
Older Than Two Fiscal Years (Archived)						
	<a href="#">8244002</a>	Marc White3	04/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Closed
	<a href="#">8244003</a>	Marc White3	04/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8244004</a>	Marc White3	04/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8244005</a>	Marc White3	04/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8244006</a>	Marc White3	04/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">NMP6001</a>	Marc White3	04/22/2008	AUDIT (2-111-01)		Open
	<a href="#">8244001</a>	Avg1 UserUAO	04/22/2008	BLDG. & GROUNDS-- (2-177-00)		Open
	<a href="#">8240231</a>	Marc White3	04/18/2008	HUMAN RESOURCES (2-304-00)		Open
	<a href="#">8240477</a>	Marc White3	04/18/2008	OFFICE OF HUMAN RESOURCES MGMT. (2-373-01)		Open
	<a href="#">8240098</a>	Marc White3	04/14/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8240043</a>	Marc White3	04/09/2008	ADMISSIONS SERVICES (2-135-00)		Open
	<a href="#">8240092</a>	Marc White3	04/09/2008	SUPPLIES (2-036-00)		Open
	<a href="#">8243016</a>	Avg1 UserUAO	04/08/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Closed
	<a href="#">8243017</a>	Avg1 UserUAO	04/08/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243015</a>	Avg1 UserUAO	04/04/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243014</a>	Marc White3	03/19/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243012</a>	Appr3 UserUAO	03/04/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243013</a>	Appr3 UserUAO	03/04/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243011</a>	Marc White3	03/03/2008	IFR-UAPC (3-293-20)		Open
	<a href="#">8243010</a>	Avg1 UserUAO	02/29/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Closed
	<a href="#">8243009</a>	Avg1 UserUAO	02/28/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243007</a>	Marc White3	01/24/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243006</a>	Marc White3	01/22/2008	OFFICE OF THE UNIVERSITY CONTROLLER (2-114-00)		Open
	<a href="#">8243004</a>	Avg1 UserUAO	12/18/2007	UNIVERSITY CONTRACTING OFFICE (2-173-00)		Open

# CUNY e-PROCUREMENT SYSTEM (EPS)

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