Procurement Work Flow

```
Procurement
Request Form
```
→
```
Filled out &
Signed off by:
Employee/
Dept Mgr
```
→
```
Deliver to
Biz Office
```
→
```
Form must get
Biz Mgr Sig &
VP of Admin Sig
depending on roles
Then routed to
Budget Office
```
↓
```
Budget Office fills in
Funding info
(GL, MP,OU, FndSrc)
Sends the form to
IT Admin
```
↓
```
IT Admin
```
↓
```
Signed form
entered into CRM
and
Assigned to
York Security Group
(ASL)
```
↓
```
ASL Assign Roles
```
↓
```
ASL's verify
supervisor, checks
to see if emp is in
IMS, adds roles
bundles and
updates and closes
CRM case
```
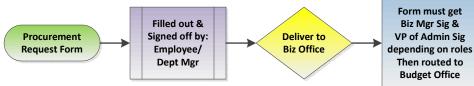
Forms:
Like all CUNYfirst security access request forms the Procurement form can be found at https://security.cuny.edu. This is a required form to gain access to the PeopleSoft system, and must be requested by the employee's manager. No employee may request access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the Effective Date of the personnel action.

Workflow:
The work flow is design to help you identify where the form needs to go. This is not a how to on what to fill out. You should have received training on how the Procurement system works before filling out one of these forms. Contact the Business Office for the next training or get in touch with the CUNYfirst subject matter expert for the Financial Chain module.

Form Information:
The form is 5 pages long currently and of critical note is to provide your emplD, and get it properly signed. Review this workflow to see who needs to sign off on this form.

Signature:
The employee requesting the role
The supervisor requesting the role for the employee
The Manager of the Business Office
The VP of Administrative Affairs (**Only for certain roles**)

Helpful Tip:
The Budget Office will fill in the funding information

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Fully Integrated Resources & Services Tool
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CUNYfirst Procurement User Access Request Form - PRODUCTION

Please Note: This is a required form to gain access to the PeopleSoft system, and must be requested by the employee's manager. No employee may request access for themselves. For transferring employees, a separate form must be completed from the Campus and/or Department transferring FROM and TO in order to modify access in both areas. This request must be made in advance of the Effective Date of the personnel action.
Security is granted by Business Unit.

EMPLOYEE INFORMATION SECTION:

Last Name:	First Name:
CUNYfirst Emp ID *:	Job Title:
Business Unit / Campus:	Department Name:
Work Phone: Ext:	CUNY email address:

CONFIDENTIALITY STATEMENT (Must be signed by the Employee):
I understand that the data obtained from any CUNYfirst system is to be considered confidential and NOT to be shared with anyone who is not authorized to receive such data. I understand that I am individually accountable for the use of my User ID in the CUNYfirst system. Improper use of my User ID could lead to revocation of access rights and further disciplinary proceedings in accordance with CUNY policies, rules and regulations, and applicable collective bargaining agreements.

Employee's Signature:_____   Date:_____

Procurement Roles

Role Description	Add	Remove
Requester*		
Creator**		
Requester's Supervisor		
Department Approver – Level 1****		
Department Approver – Level 2****		
IT Category Approver		
Facilities Category Approver		
Hazmat Category Approver		
Budget Reviewer***		
Buyer		
PO Approver		
Receiver		
Inspector		
AP Voucher Entry		
AP Pend 3(Level1) Approver (Community Colleges)		
AP Pend5(Level2) Approver (Community Colleges)		
AP Approver (Senior Colleges)©		
Contract Entry ^		

*All Requesters must also specify their Supervisors (See Step#1 below)
** For Creator, specify the requestor for whom this individual is creating the requisition (See Step#2 below)
**** For Department Approvers (See Step#3 below)
***If no Department Approver is found on a Requisition, then Budget Reviewer in the campuses will be notified via Worklist
© AP Approvers for Senior Colleges must not check AP Voucher Entry and vice versa as per New York State Policy
^ Refer to Contract Processing section for details (See Page 4 of 5)