



New York State Office of General Services
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Creating a Requisition in SFS

Creating and approving a requisition are the first steps in the basic purchasing lifecycle.

In this module, you will learn how to create a requisition in SFS.

To begin, click **SFS Applications**.

Employee-facing registry content - Microsoft Internet Explorer provided by New York State OGS

https://nysis.sfs.ny.gov/psp/SFS/EMPLOYEE/EMPL/h/?tab=DEFAULT

File Edit View Favorites Tools Help

Employee-facing registry content

Welcome

sfs STATEWIDE FINANCIAL SYSTEM

Enterprise Menu

- SFS Applications
- My Content
- Reporting Tools
 - My Instant Messaging
 - Change My Password
 - My Personalizations
 - My System Profile

SFS Communications

Welcome to the Statewide Financial System (SFS) Agency User Portal!

First time logging in? See the **"BEFORE using the SFS"** section below for important steps and information regarding your password.

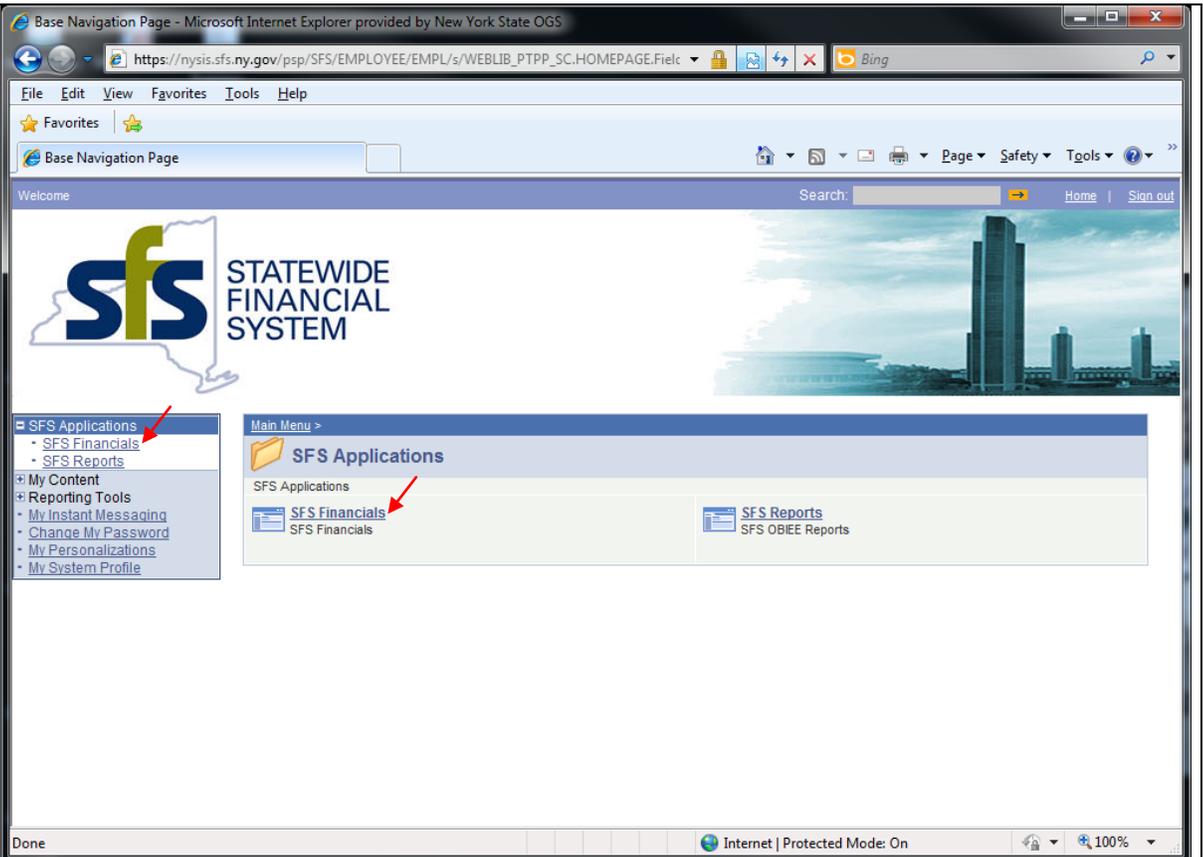
See the [1/11 issue of Enterprise Connection](#) for information on: SAVE THE DATE: Fiscal Year End Kickoff Workshop on 1/24/13; Review Cost Centers Mapped to Invalid Values by 2/1/13; Fiscal Year-End Impact: Status of Agency KK; Reports for Quarterly ARRA Federal Grant Reporting Posted; New Phase 2 ASA Self-Service Functionality Launched; new items posted to SFS website.

My Reports

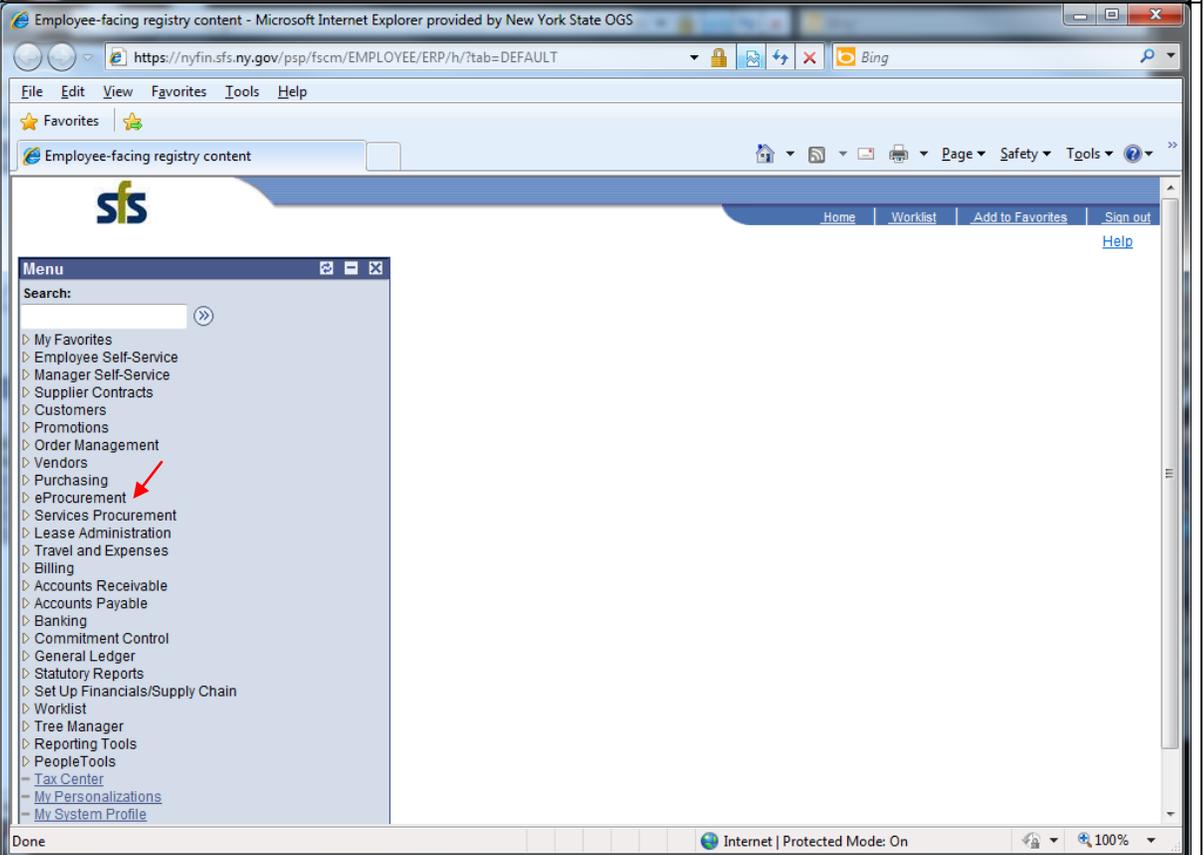
Report	Folder
NYGL0363	NY_BC
NYGR0039	Gener:
NYGL0363	NY_BC
NY_CSHBAL_AE	Gener:
FS_BP	Gener:

Report Ms

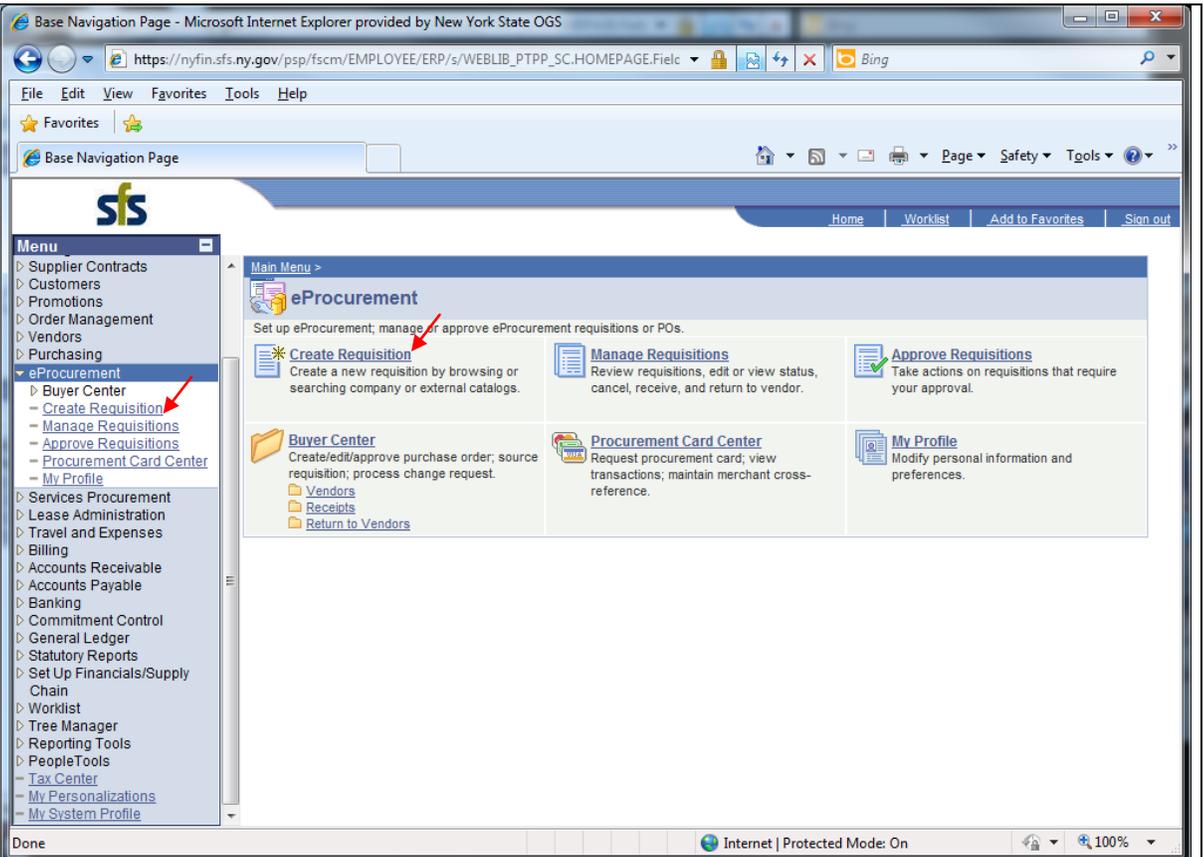
Click **SFS Financials** (either location).



Click **eProcurement**.

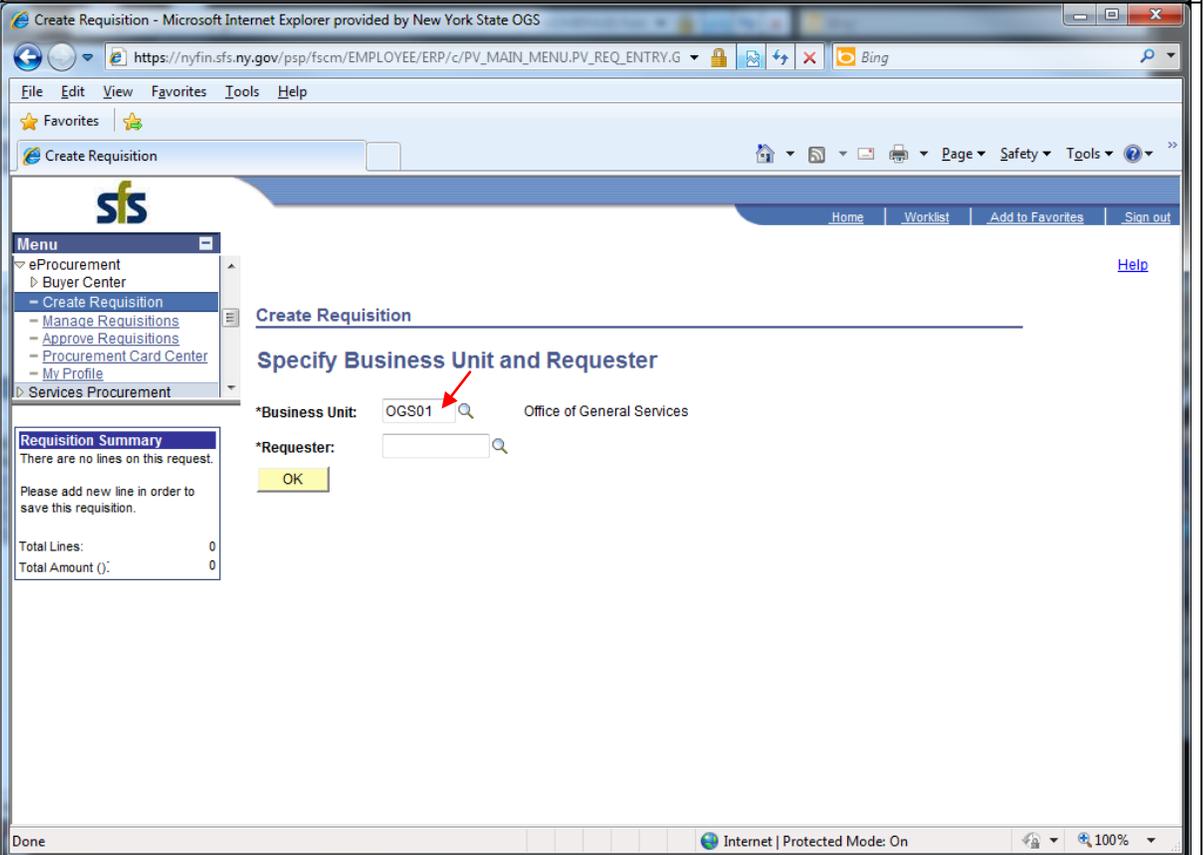


Click **Create a Requisition** (either location).

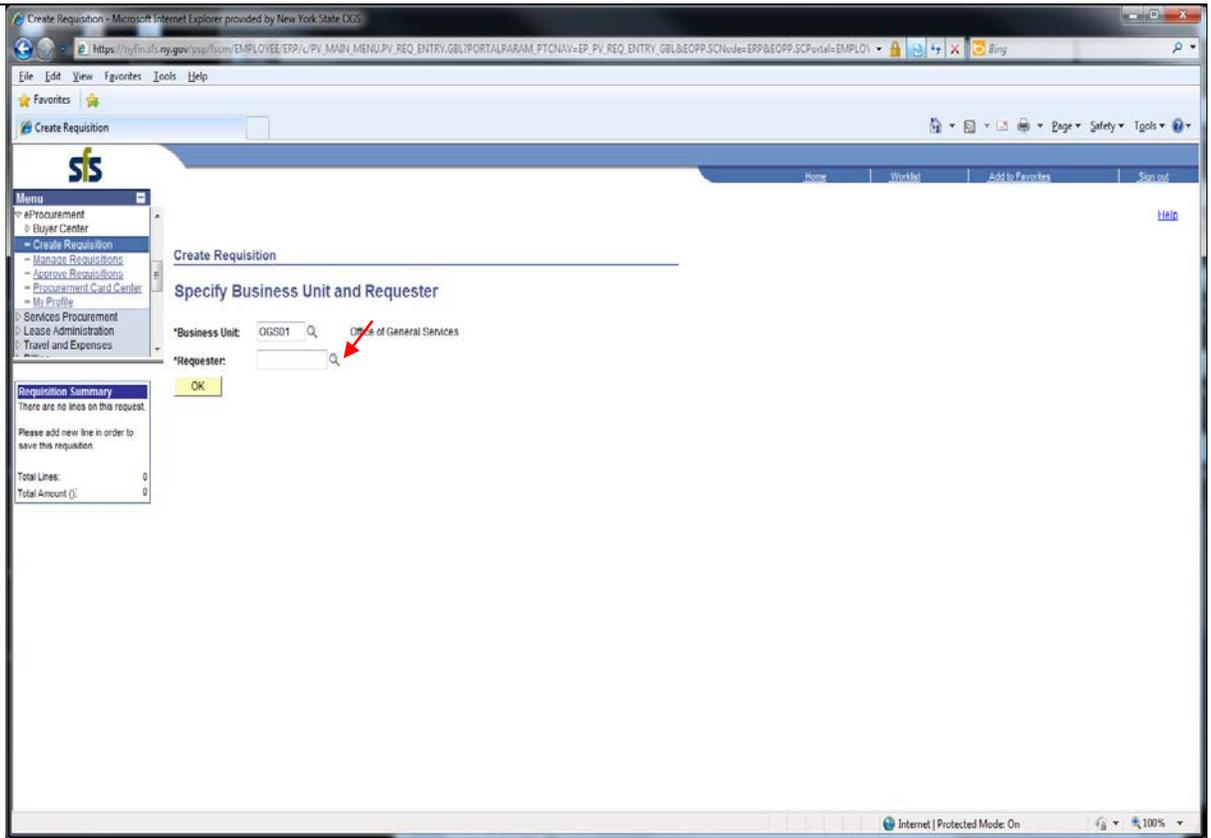


NOTE: Items with * are required.

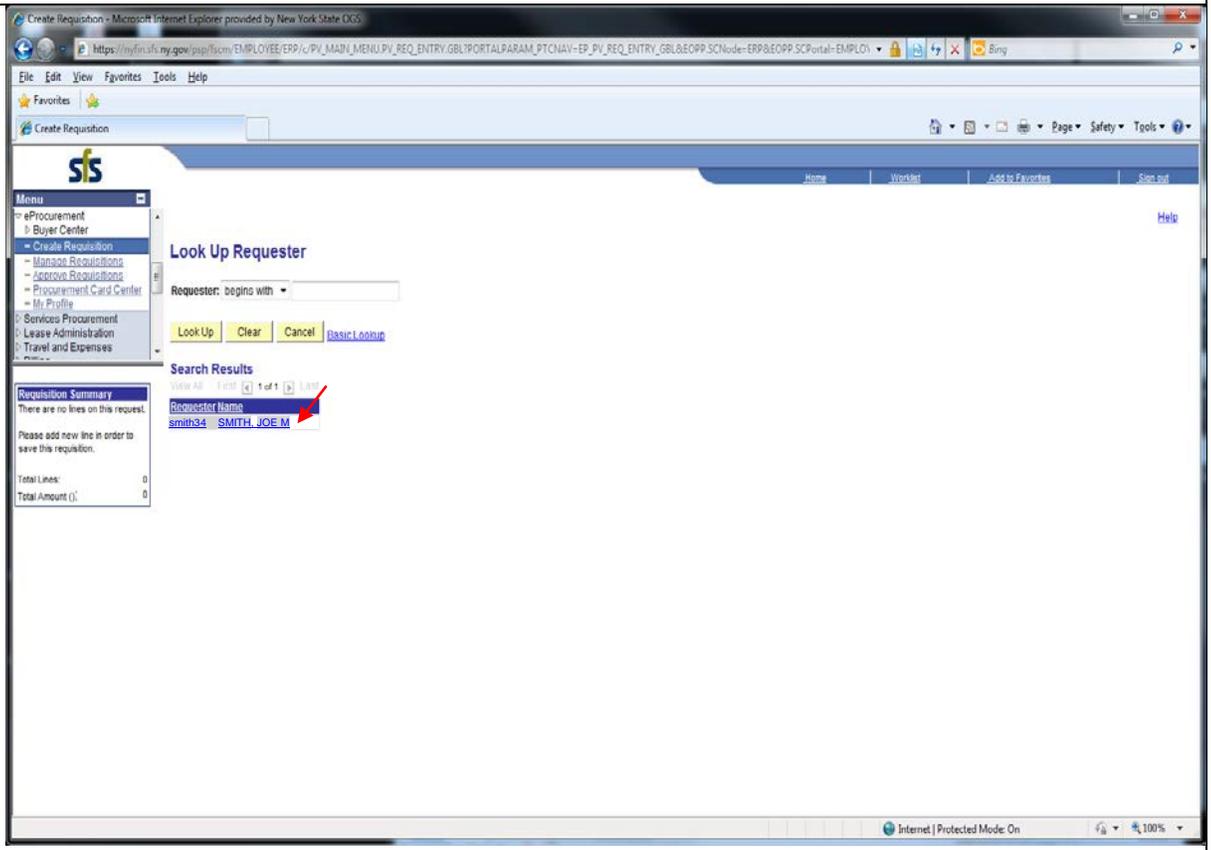
The **Business Unit** field automatically populates with your agency.



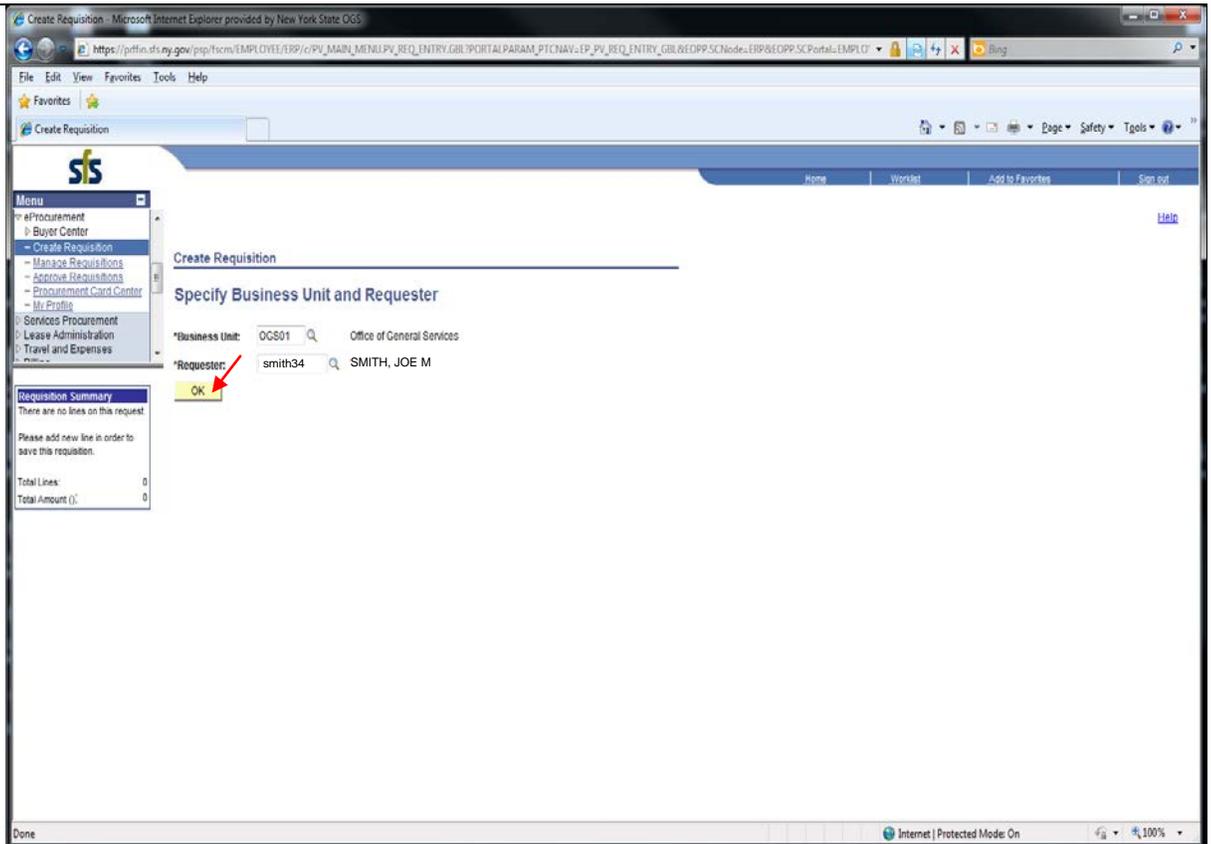
To fill in the **Requester** field with the User ID, click on the magnifying glass.



Select your name, or if you are acting as a proxy, select the person you for whom the requisition is being requested.



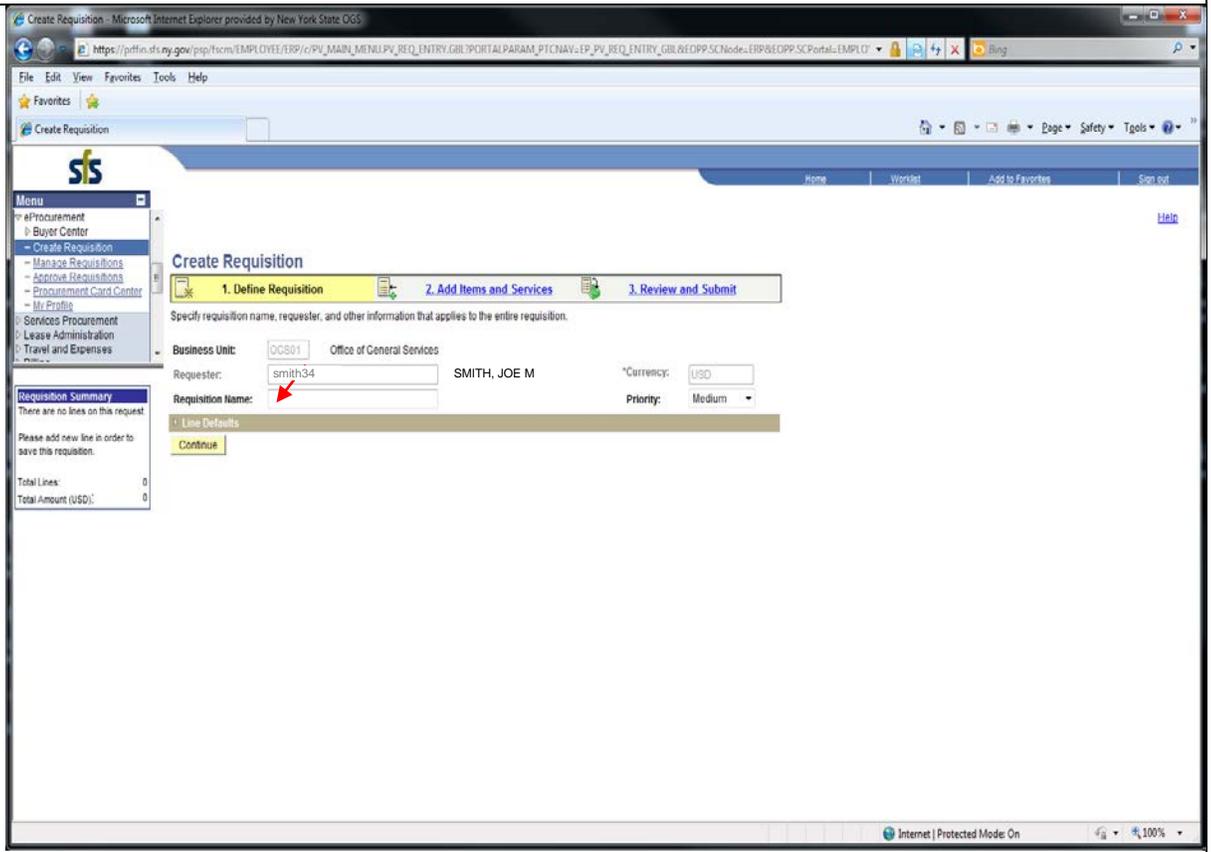
Click **OK**.



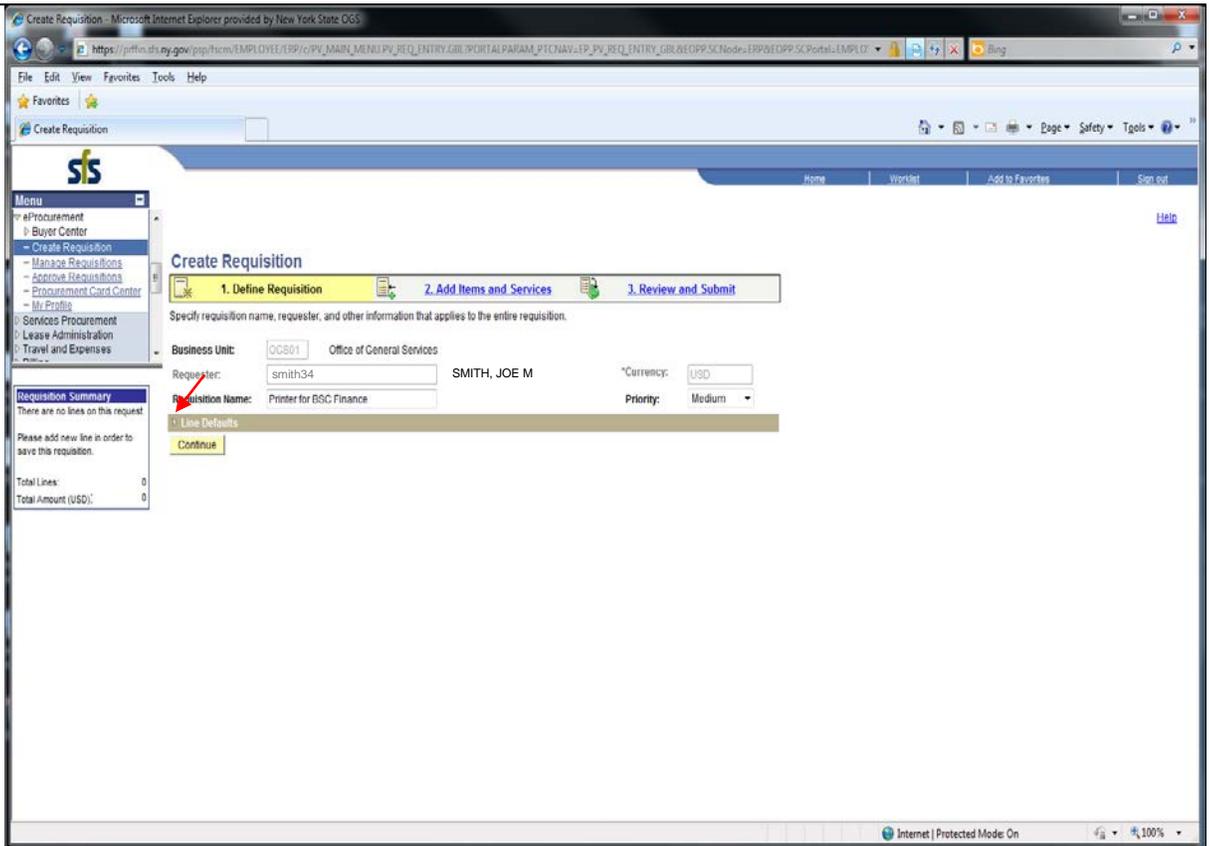
The **Create Requisition** page is used to create and define requisitions.

Click the **Requisition Name** field and enter a name that is simple, yet descriptive.

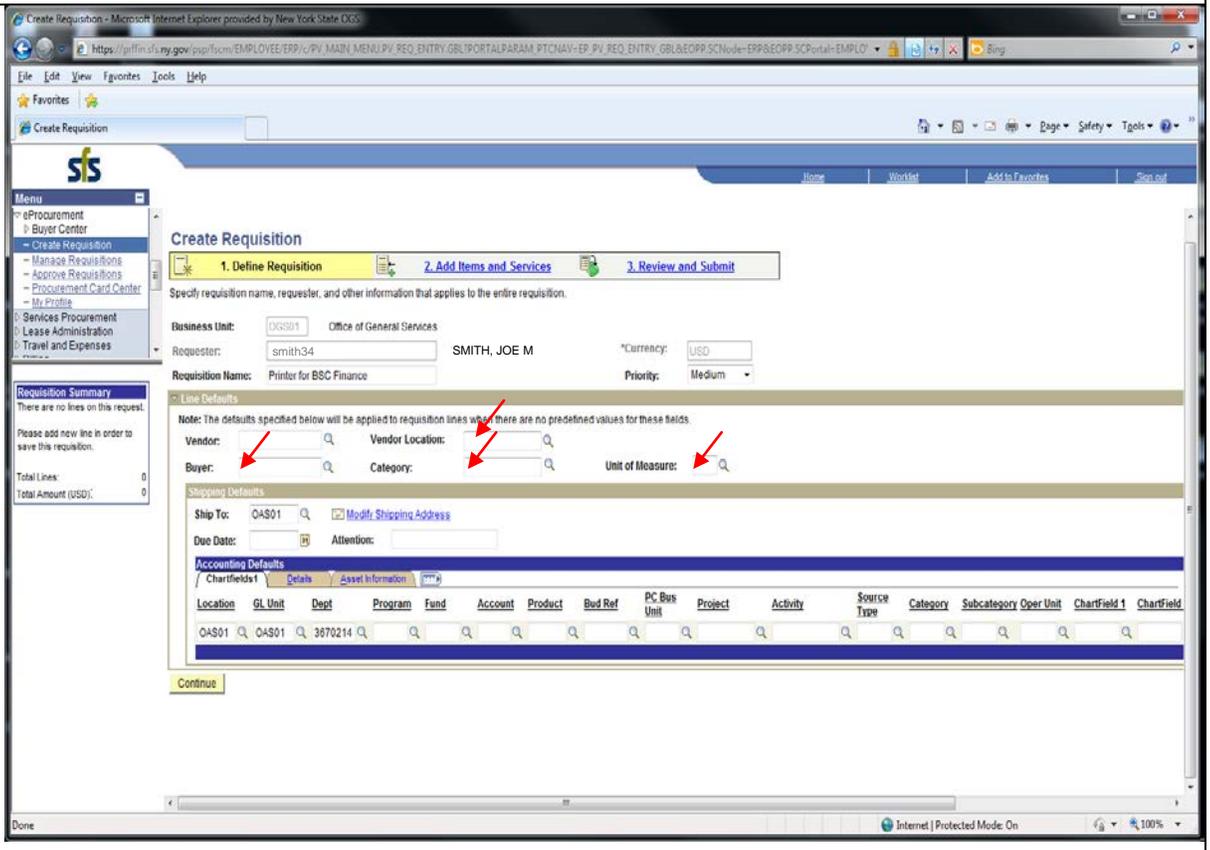
This is for your reference only. If it is not filled in it will default to the Requisition ID.



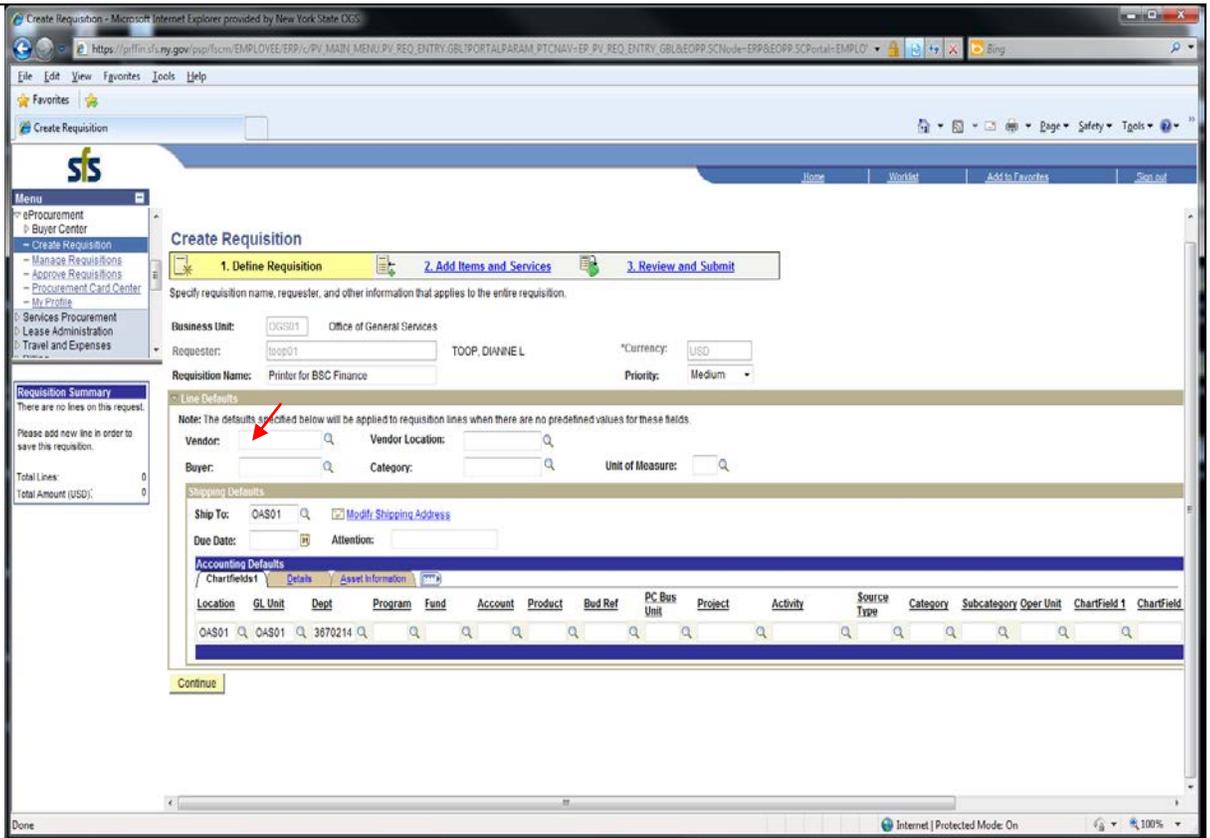
Click the arrow (expand section) next to **Line Defaults** to open the requisition defaults fields.



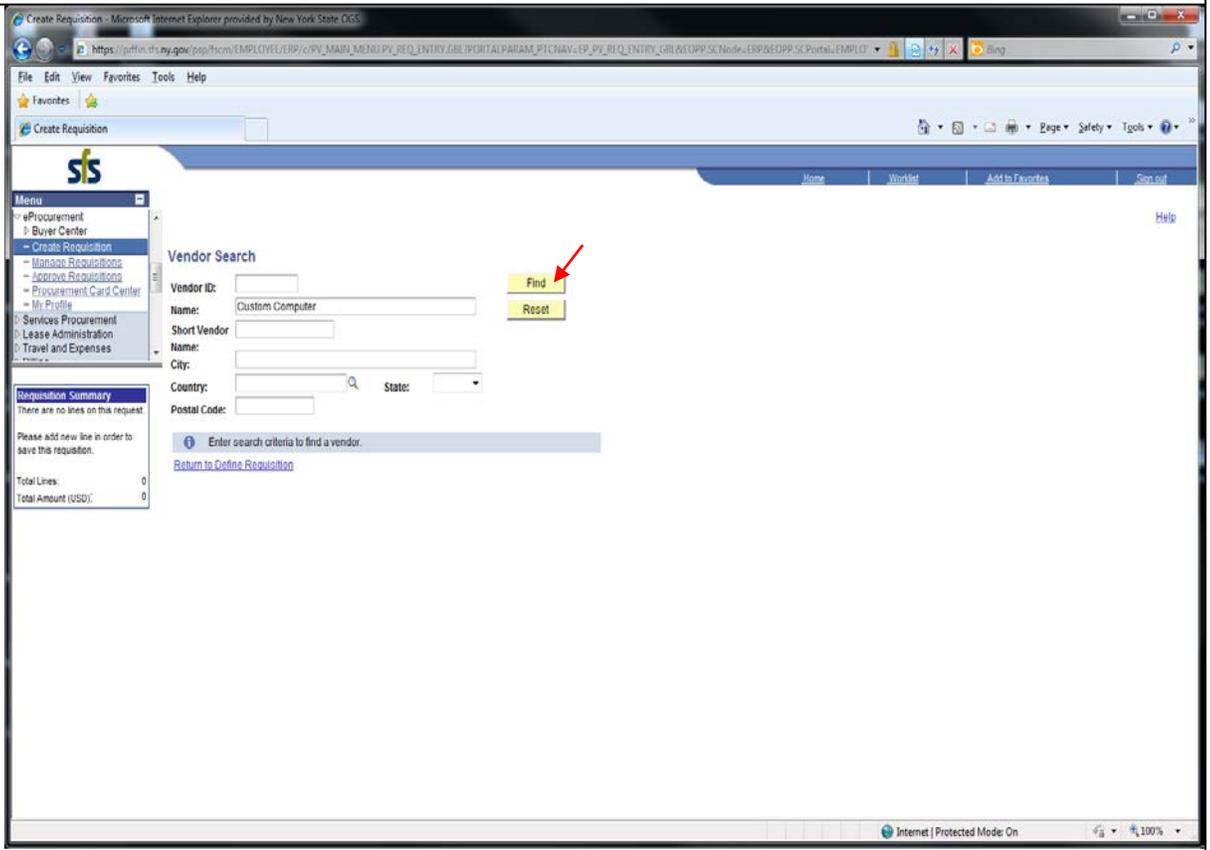
Leave Vendor Location, Buyer, Category, and Unit of Measure blank.



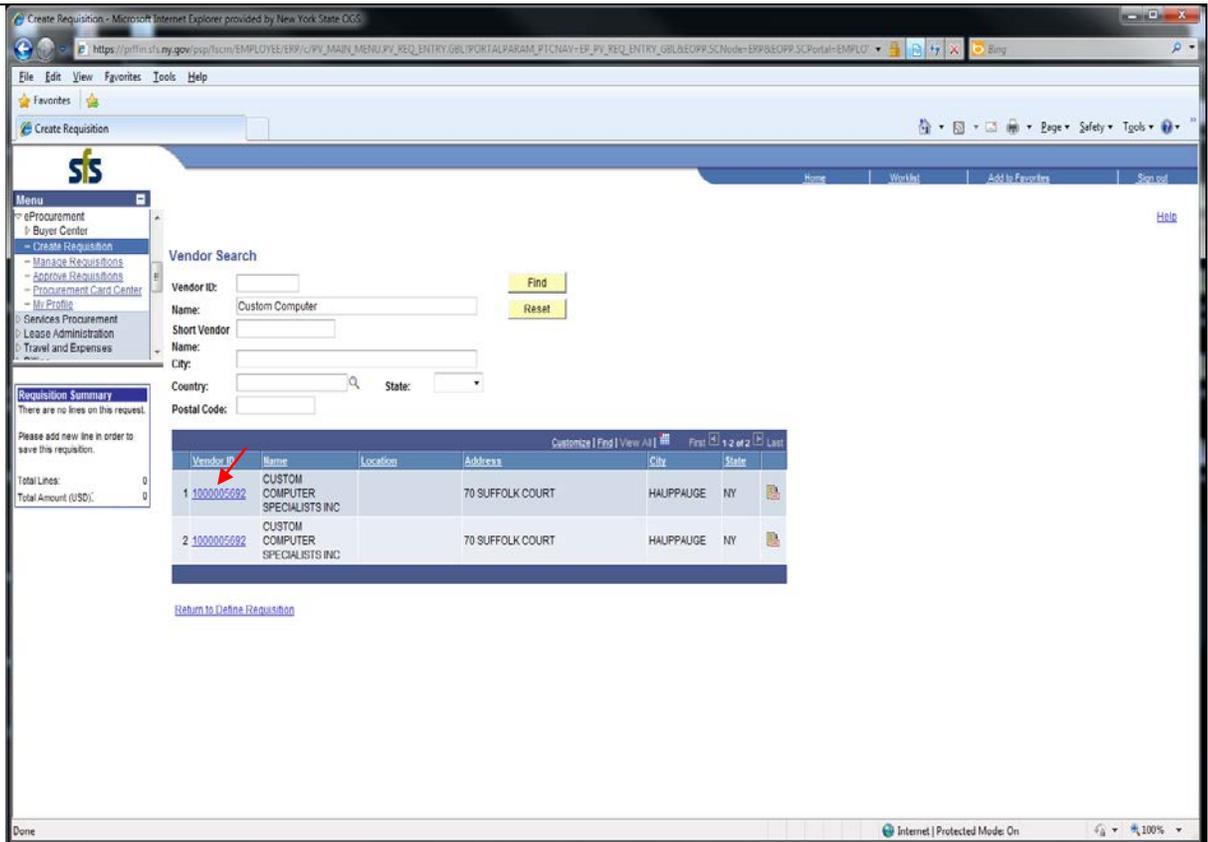
If all items will be purchased from the same vendor, select the magnifying glass at Vendor.



Type in vendor information into any field. Select **Find**.



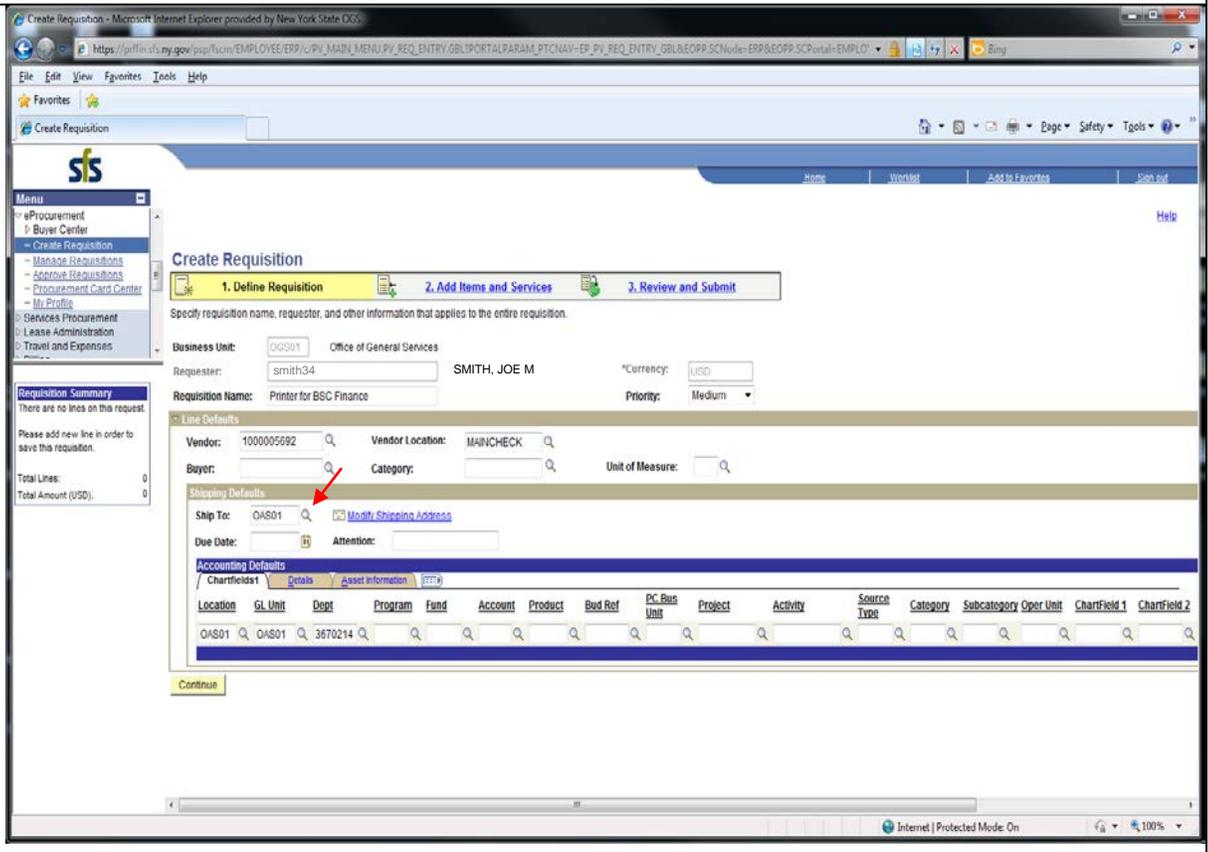
Select the correct Vendor ID.



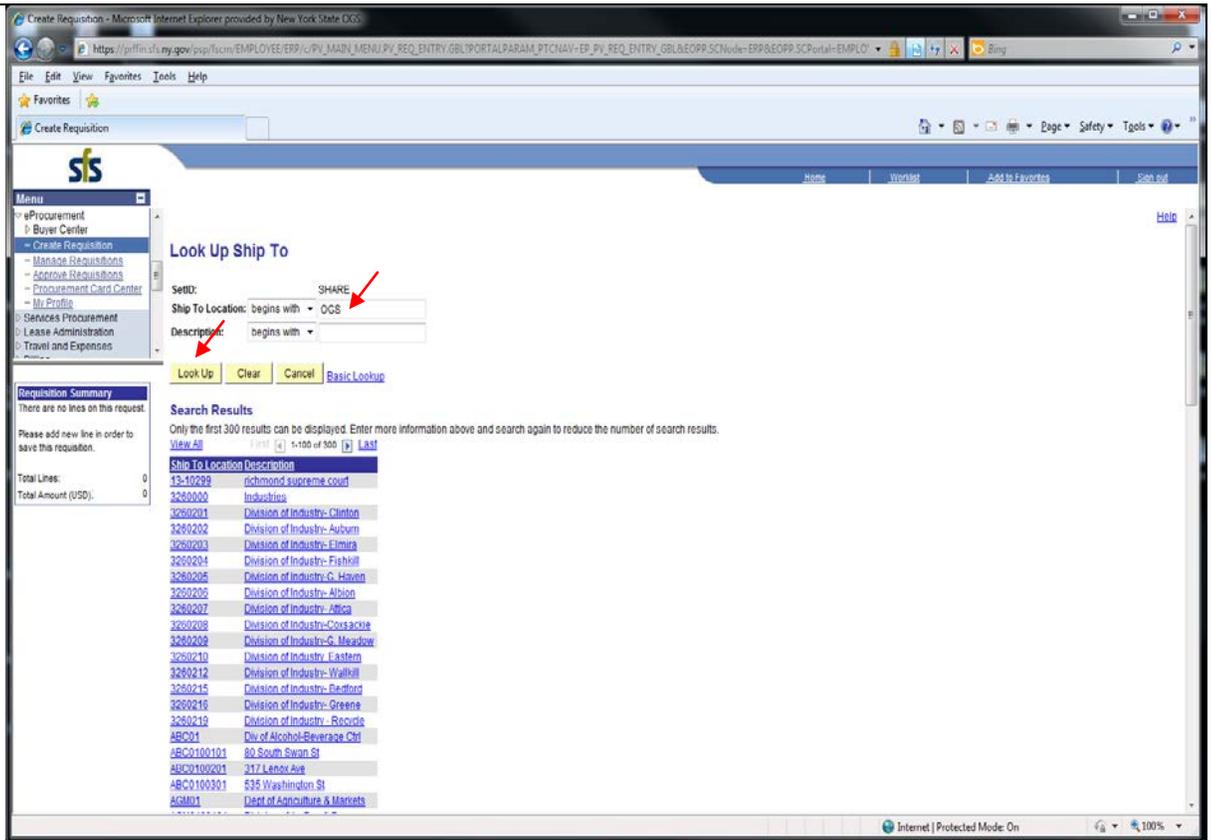
Shipping Defaults

Check your Ship To address. An agency may have multiple addresses in SFS.

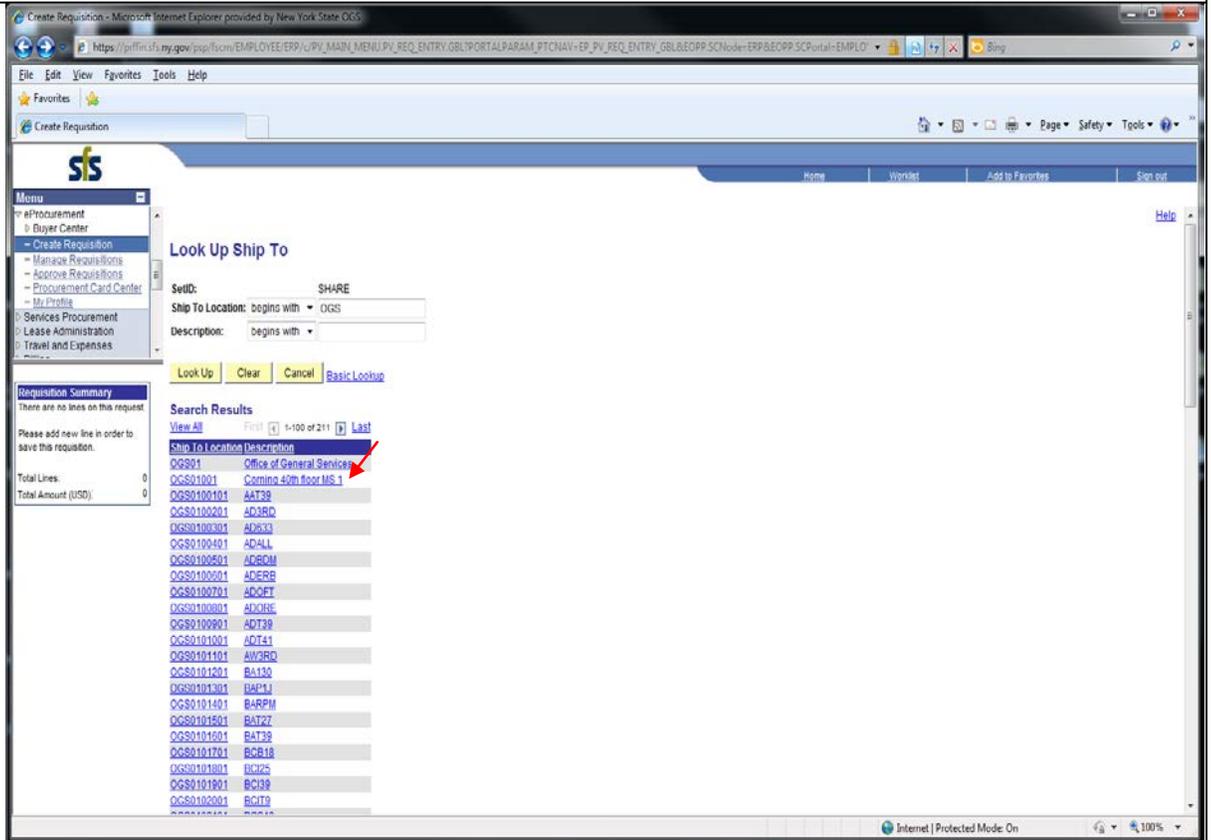
If it is correct, proceed to the next step. If it is not correct, click  to look up the Ship to information.



Type in **Ship To Location** and click **Look Up**.



Select correct location.



If the address is not specific enough in the Ship To you can adjust by clicking **Modify Shipping Address**.

Fill in the **Attention** field, if known.

The screenshot displays the 'Create Requisition' web application. The interface includes a navigation menu on the left with options like 'eProcurement', 'Buyer Center', and 'Requestion Summary'. The main content area is titled 'Create Requisition' and contains several sections: 'Line Defaults' with fields for Vendor, Vendor Location, Buyer, and Category; 'Shipping Defaults' with fields for Ship To, Due Date, and Attention, and a 'Modify Shipping Address' link; and 'Accounting Defaults' with a table for chartfields. A red arrow points to the 'Modify Shipping Address' link. The browser address bar shows the URL: https://portal.d3.my.gov/portal/EMPLOYEE/EMP/PC_MAIN_MENU/PC_REF_ENTRY_GBL/PORTRALPARAM_P1CNAV_EP_REF_ENTRY_GBL/REF/SCNode/FRPS/OPP/SCPortal/EMPLOYEE.

In the Accounting Defaults – Chartfields1 the Location, GL Unit, and Department auto-populate.

ChartFields are codes used to categorize financial and budget transactions.

Fill in the Program, Fund, Budget Reference, and other fields as required. If you are unsure of your coding, contact your budget office. Click Continue to add items and services.

NOTE: Budget Reference must be filled in or requisition will kick out.

Budget Offices sometimes do not include the year in their coding string.

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: OGS01 Office of General Services
Requester: smith34 SMITH, JOE M *Currency: USD
Requisition Name: Printer for BSC Finance Priority: Medium

Line Defaults
Vendor: 1000005092 Vendor Location: MAINCHECK
Buyer: Buyer Category: Unit of Measure:

Shipping Defaults
Ship To: OGS01001 Modify Shipping Address
Due Date: Attention: Joe Smith

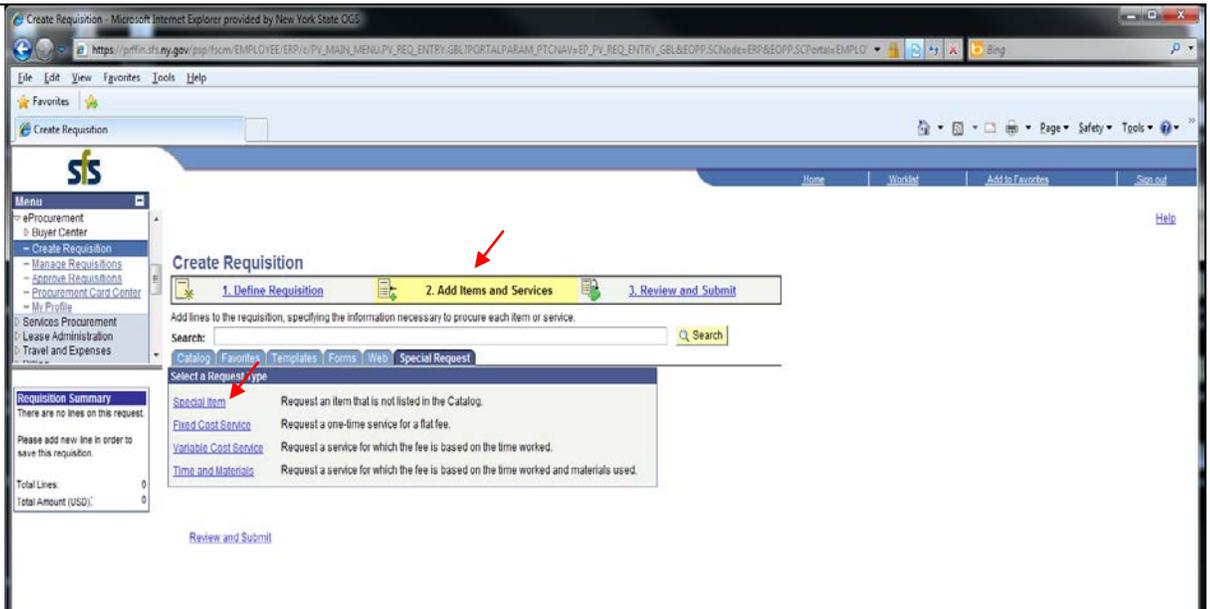
Accounting Defaults
Chartfields1 Details Asset Information

Location	GL Unit	Dept	Program	Fund	Account	Product	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory	Oper Unit	ChartField 1	ChartField 2
OGS010	OGS01	3670214	26287	10050			2012-13									

Continue

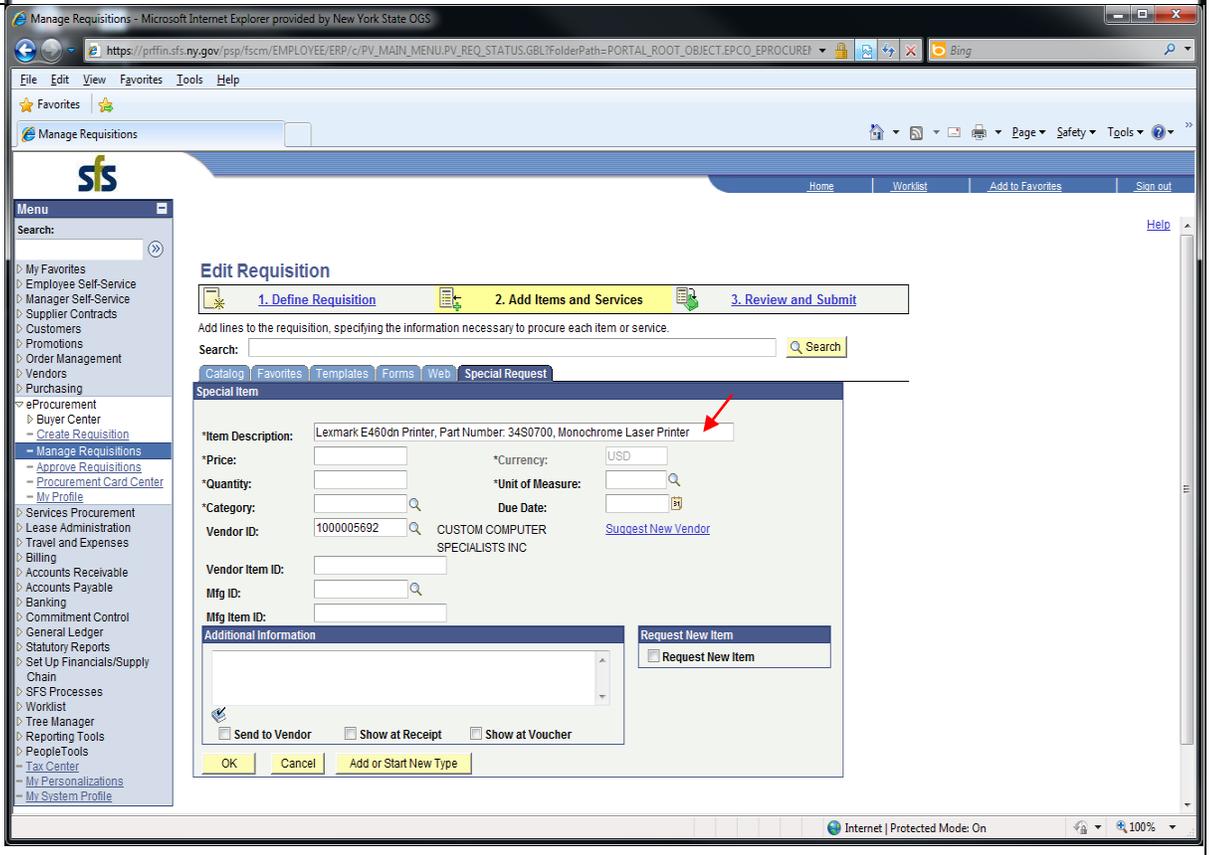
You are now in the second step of the Create Requisition process, where you will add items and services.

Click **Special Item**.



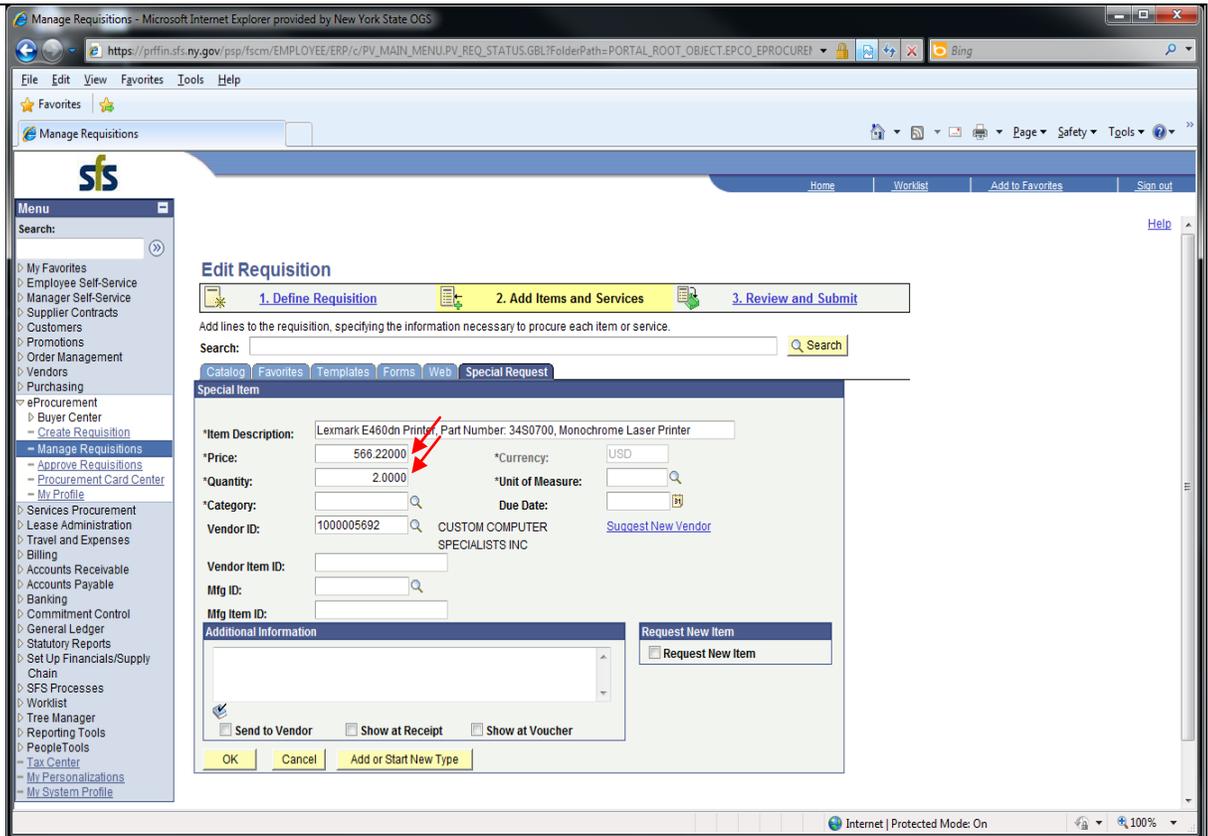
Fill in the **Item Description**. The Item Description field is used to enter a *complete* description of the item including:

- Mfg. Item Number
- Item Details (color, style, etc.)
- Region Number
- Hourly Rate
- Etc.

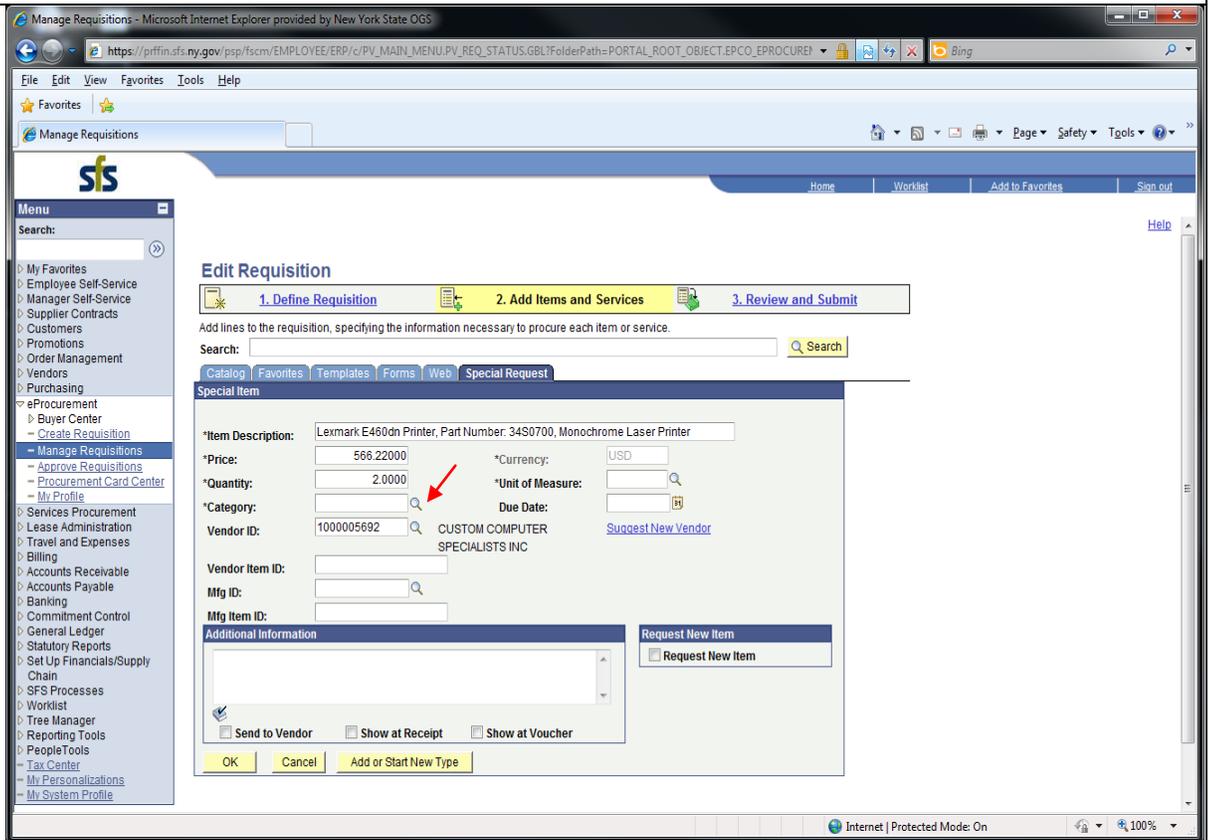


Fill in **Price** and **Quantity** fields.

If this is blanket requisition to cover multiple purchase orders, the price and quantity need to be reversed. If you need advice, please call the BSC at 457-4272, option 1, option 1.

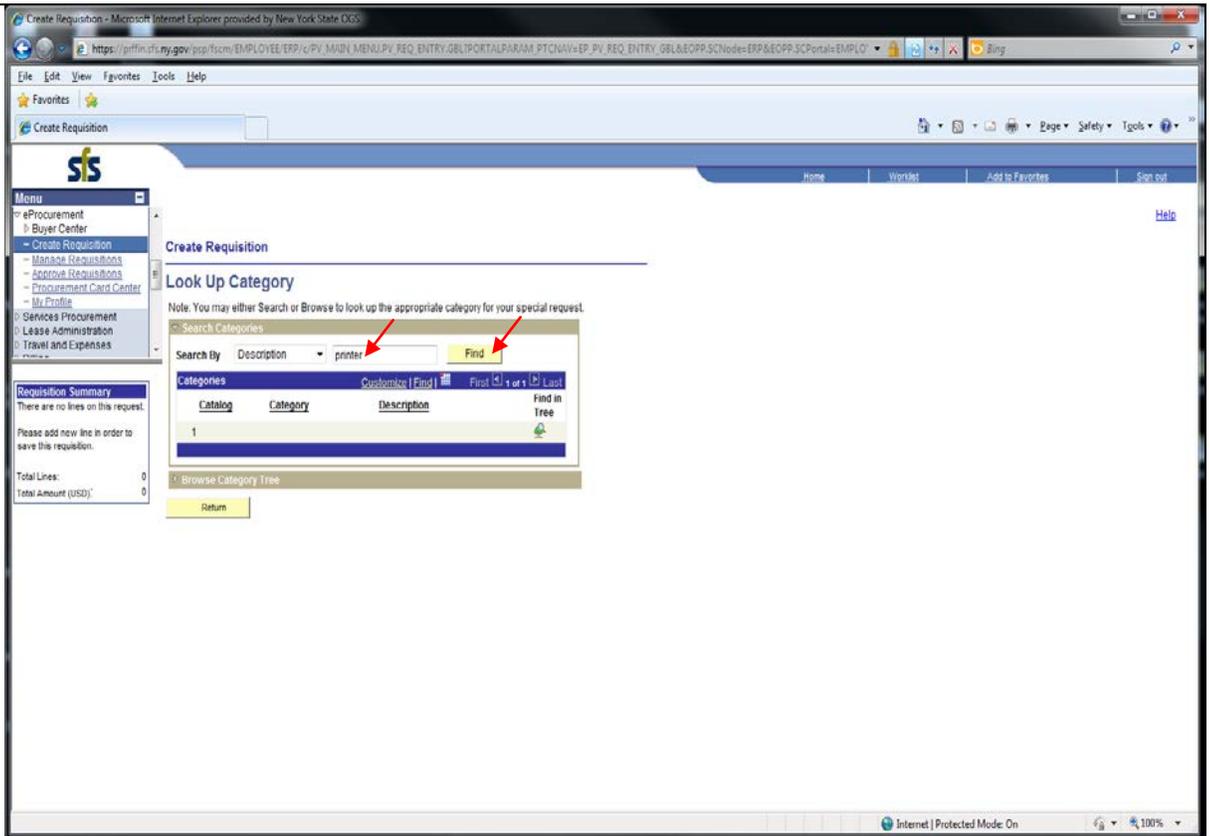


Fill in **Category** number. If you do not know the number, click  to open a lookup window for the category.



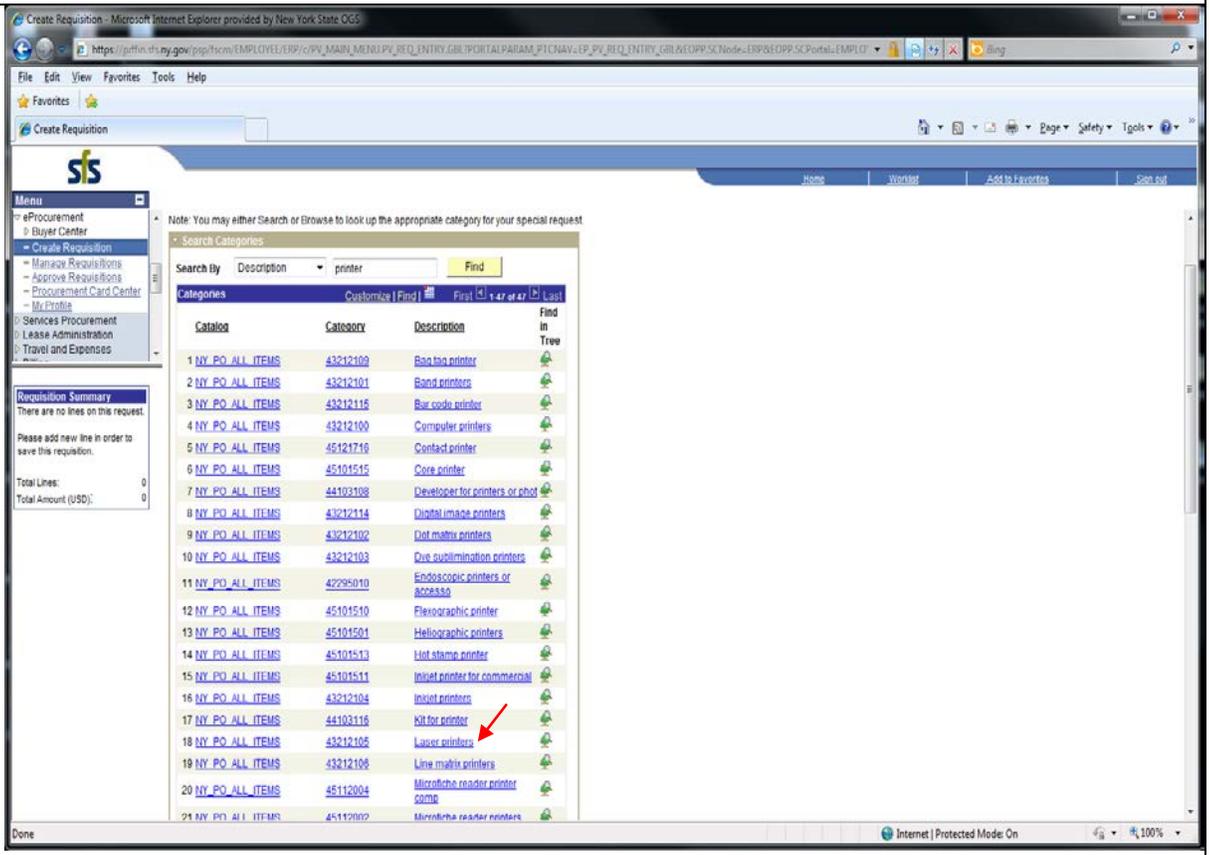
Type in a description of the item and click

Find



Click on the **Description** head to sort the items alphabetically.

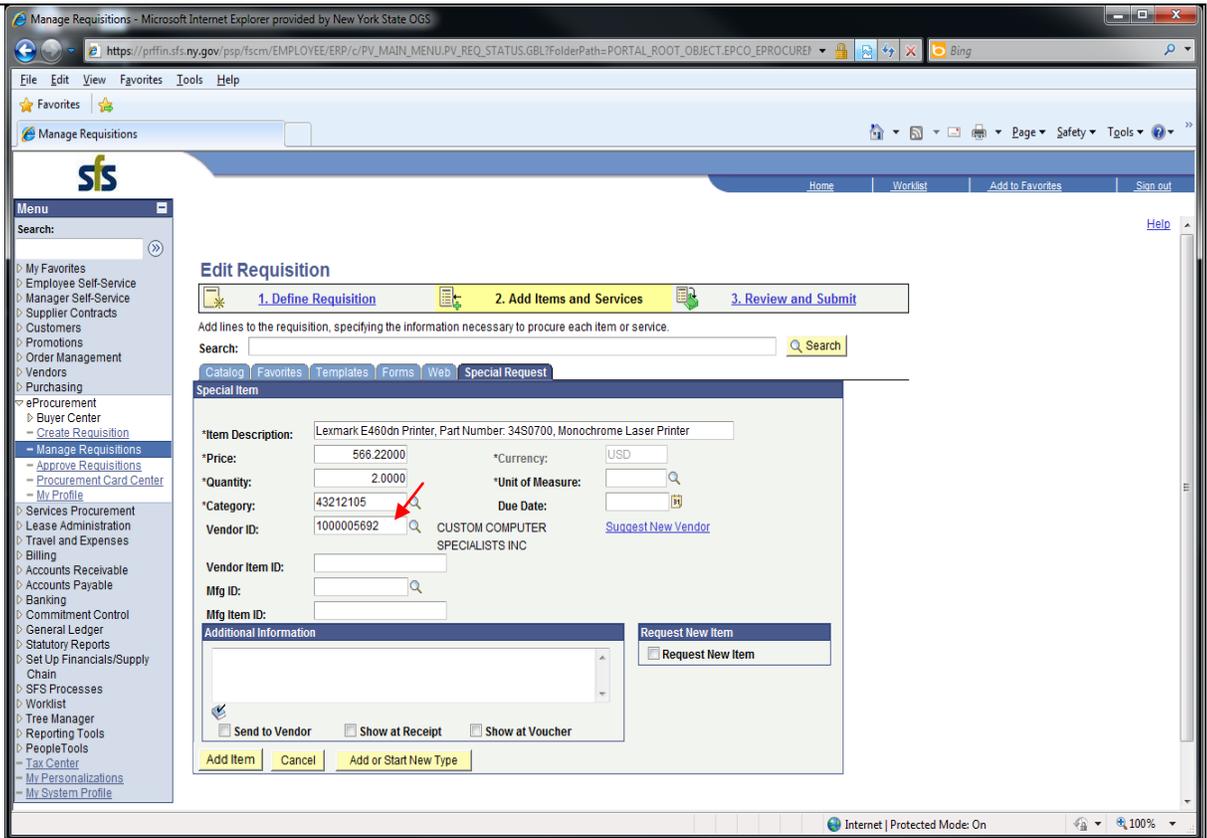
Select the correct item. Once you have selected it, you will return to the main window.



Note that **Vendor ID** came over from the default page.

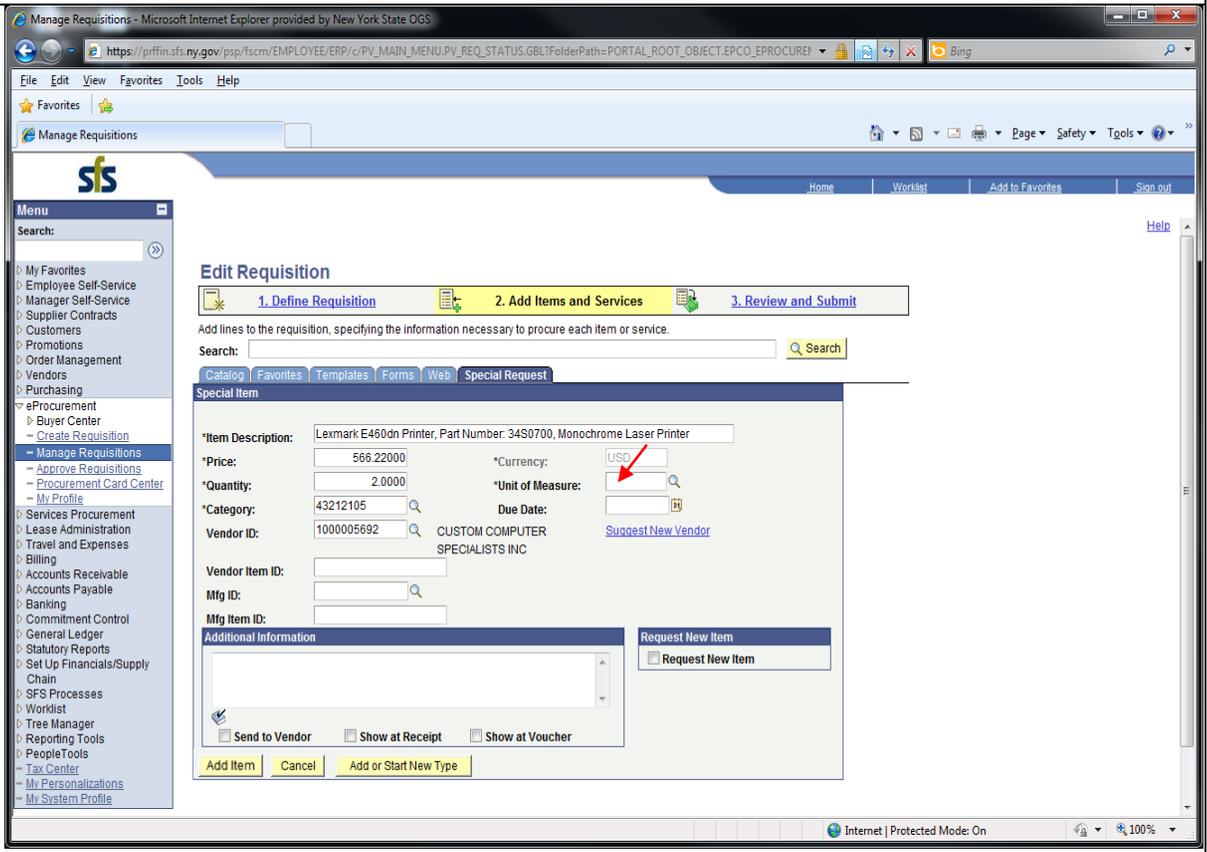
Requisitions *must* include a vendor.

If the vendor needs to change, the BSC will contact you for approval first.



Fill in **Unit of Measure**.

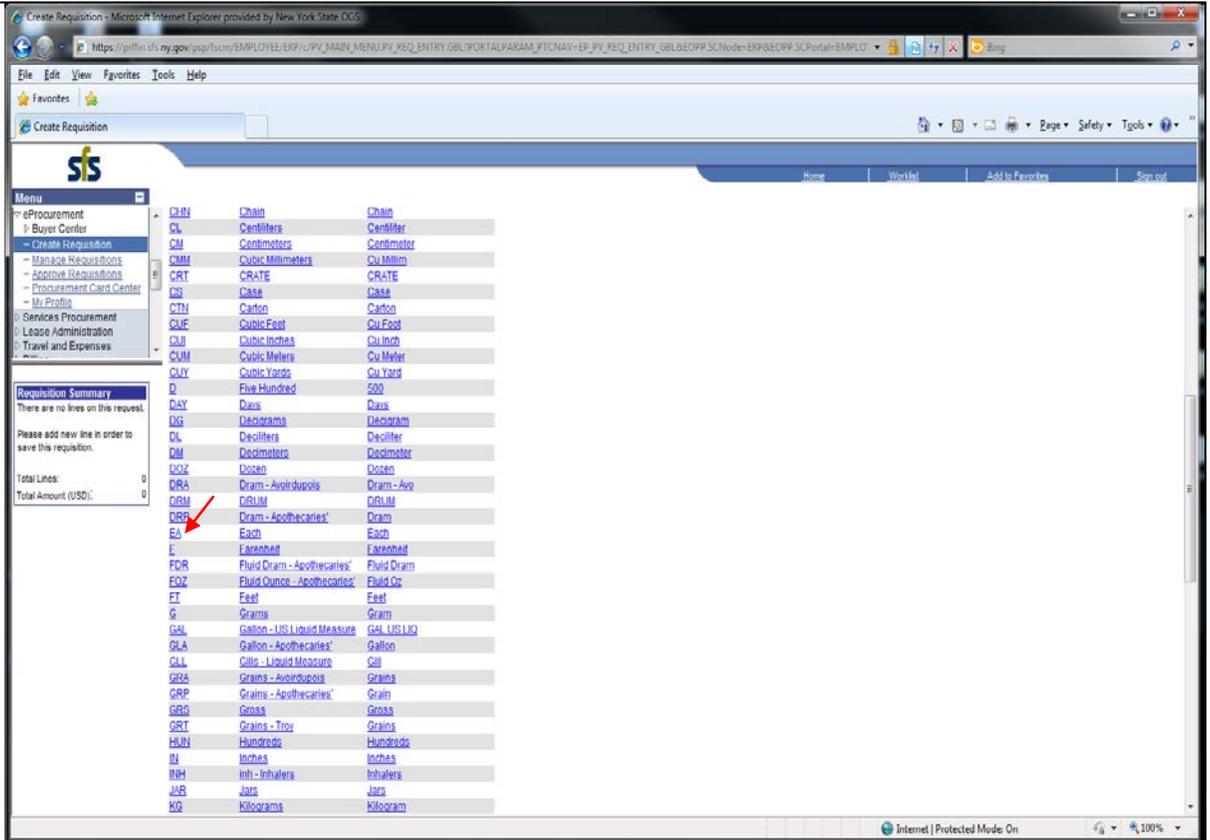
Click . If you do not know the unit of measure, use EA.



Select the correct unit.

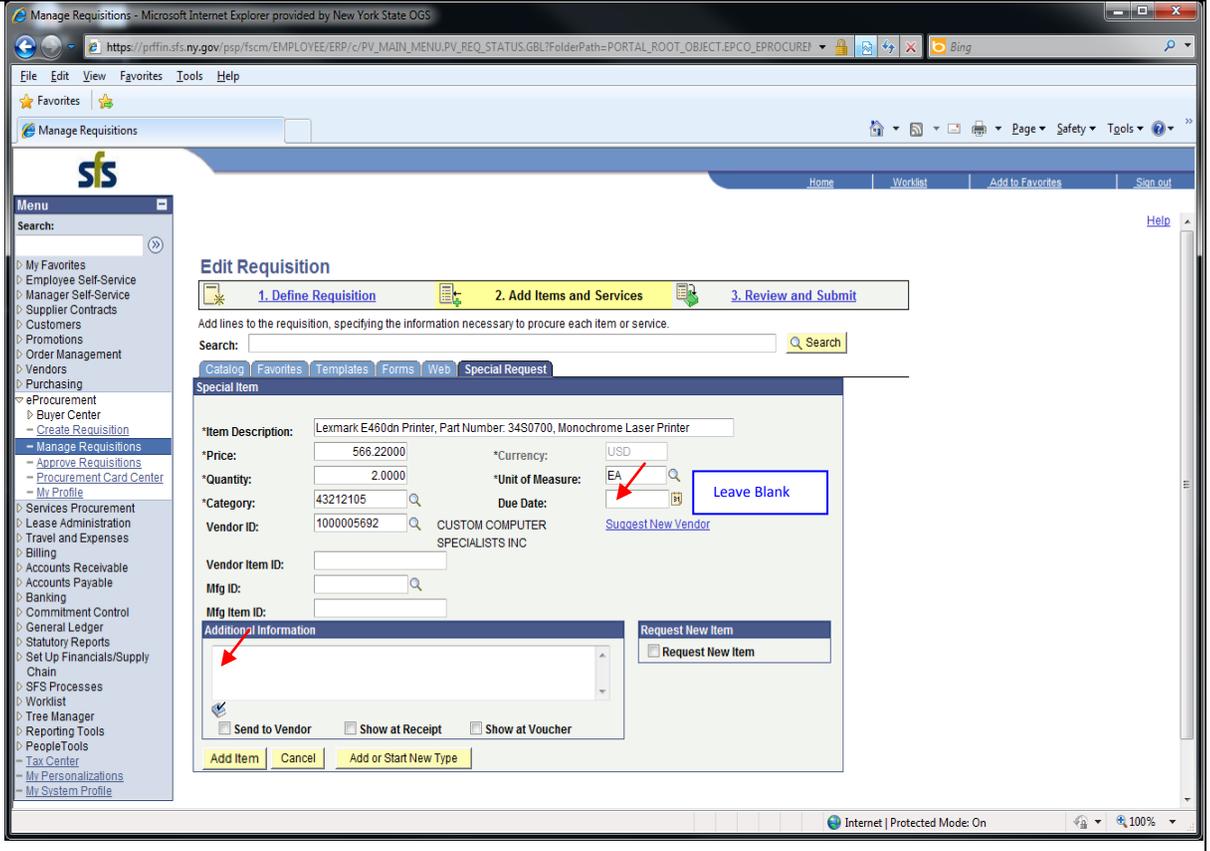
NOTE: BSC cannot change this selection.

If you need advice, please call the BSC at 457-4272, option 1, option 1.



Leave Due Date blank.

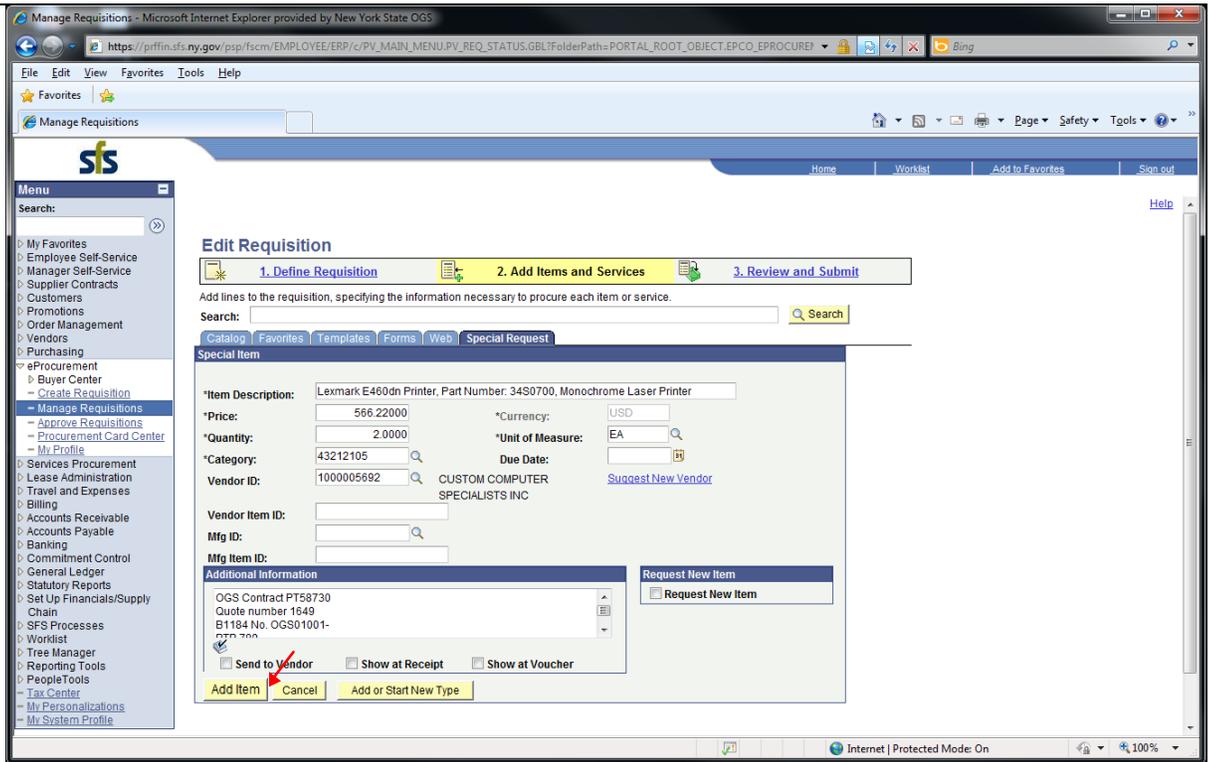
If an item is needed by a certain date, add to **Additional Information**.



In **Additional Information**, add applicable information including:

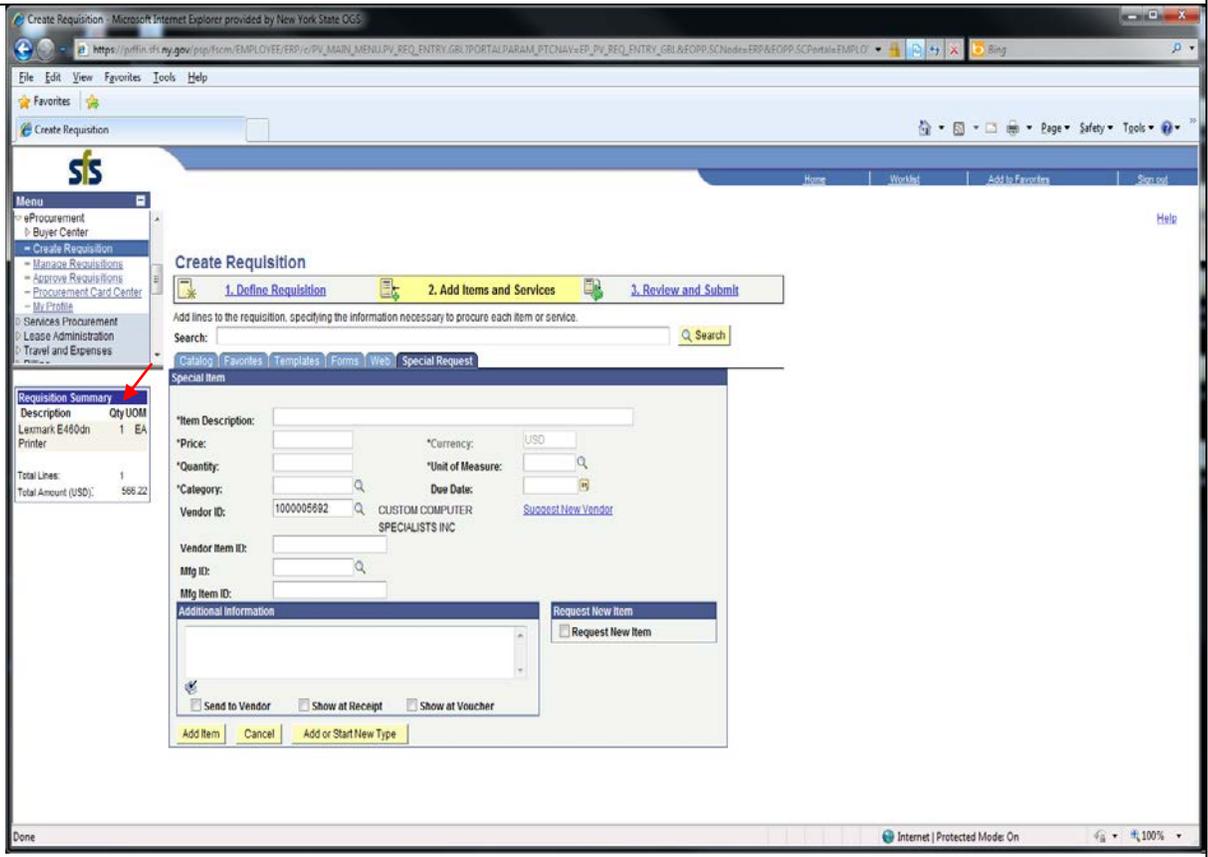
- Contract Number
- Quote Number
- B-1184 Number
- PTP Number
- Buy Desk
- Discount Rate for paying early
- Due Date

Click **Add Item**.

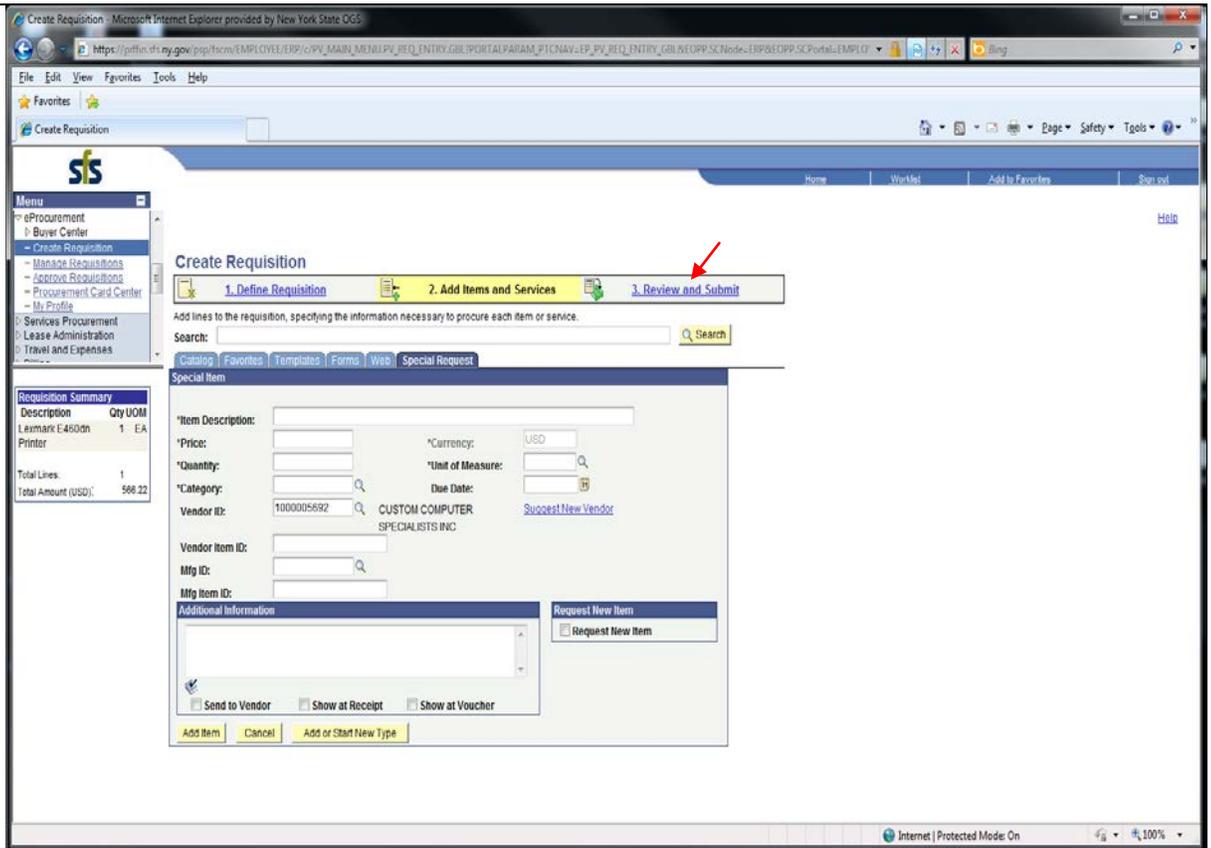


In the same manner, add all other items to be purchased.

Located on the left side bar, **Requisition Summary** will give you a summary of the requisition as it is completed.

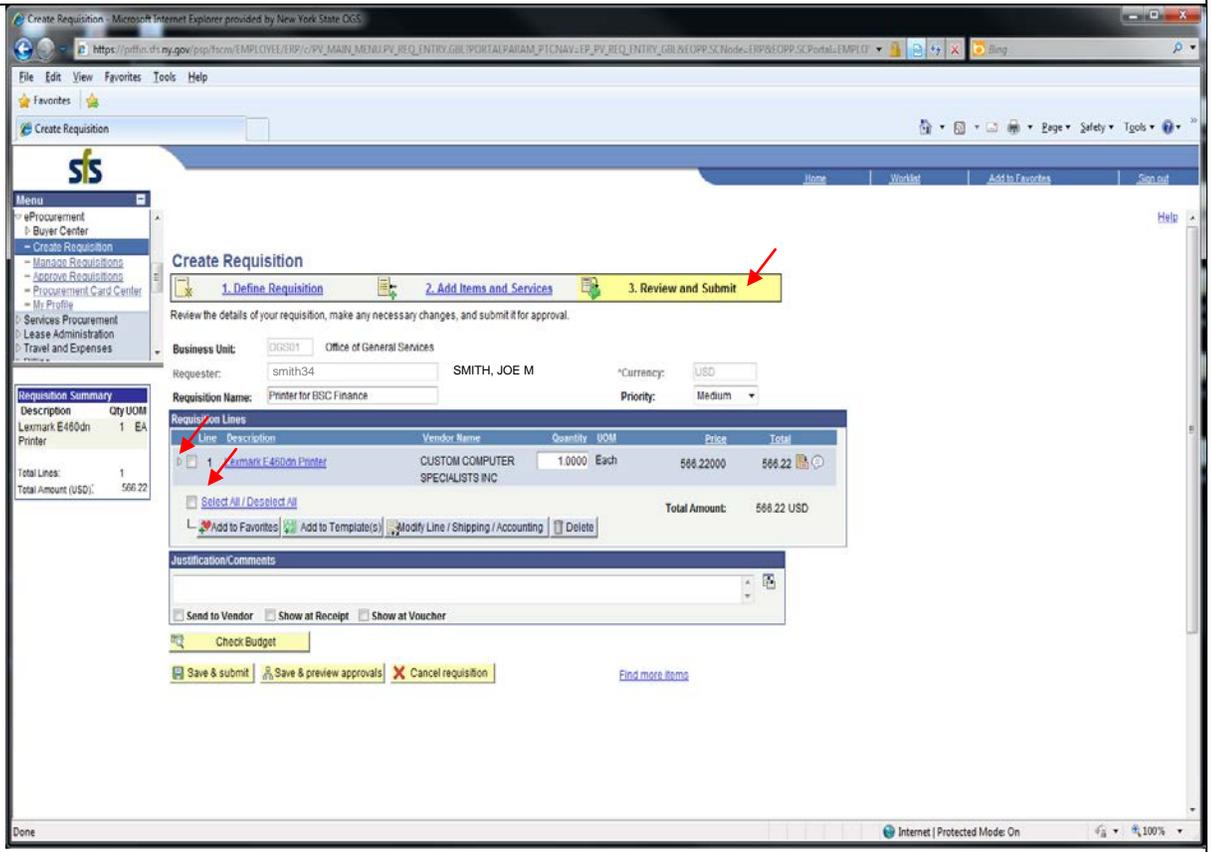


When you are finished adding items and services to your requisition, click **Review and Submit**.

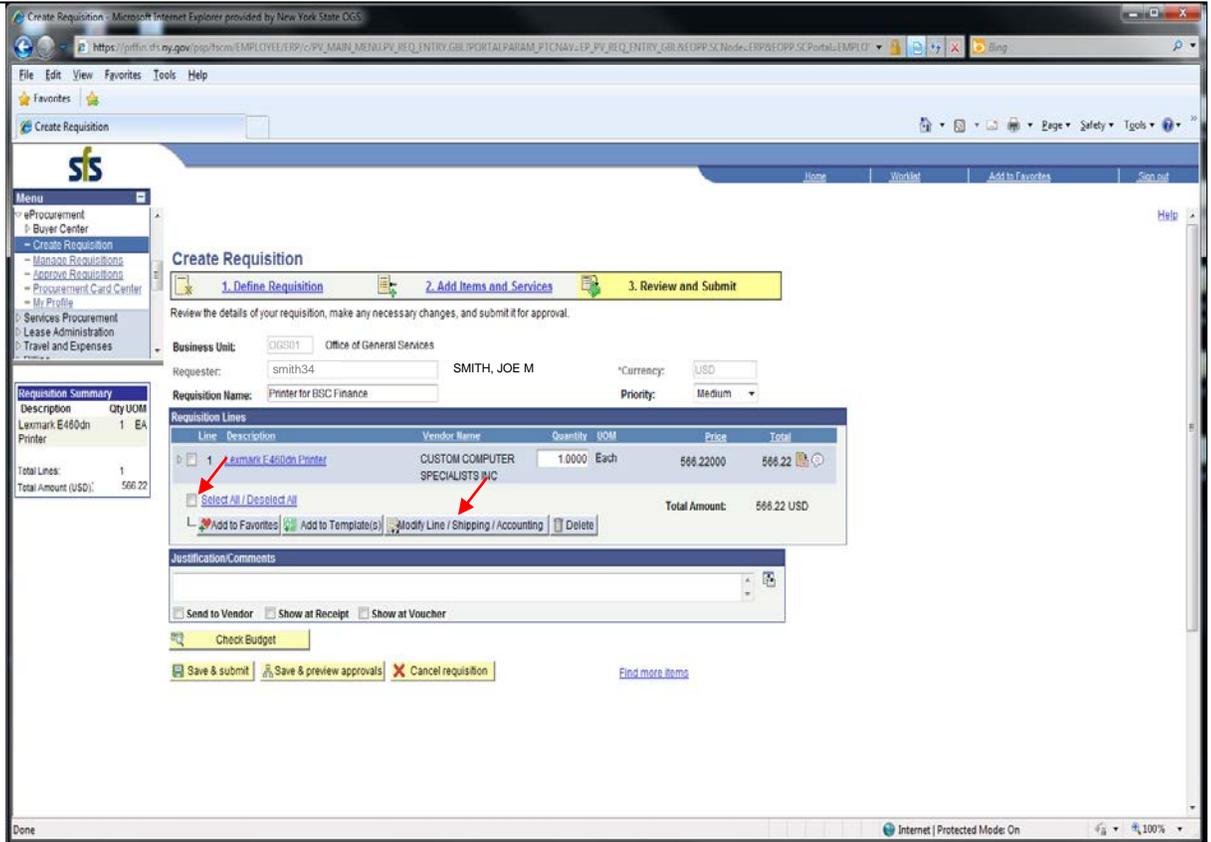


The **Review and Submit** page contains a summary of the requisition. This page is used to review the items entered. Individual lines can be modified (see bottom of page 20) or select all to modify all lines at once. Make any necessary changes to produce an accurate requisition.

Click the arrow (expand section).

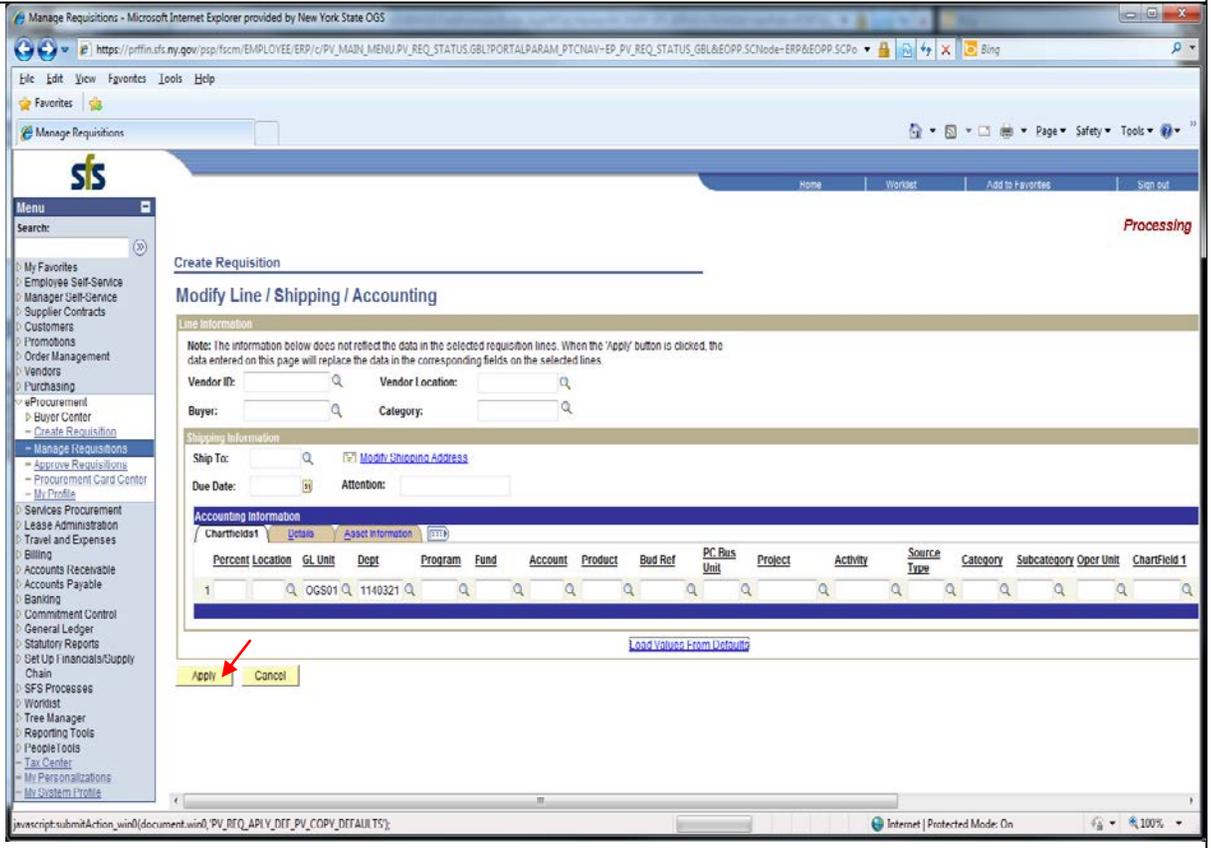


If you wish to make the same change to *all* of the lines, check **Select All/Deselect All** and click **Modify Line/Shipping/Accounting**.

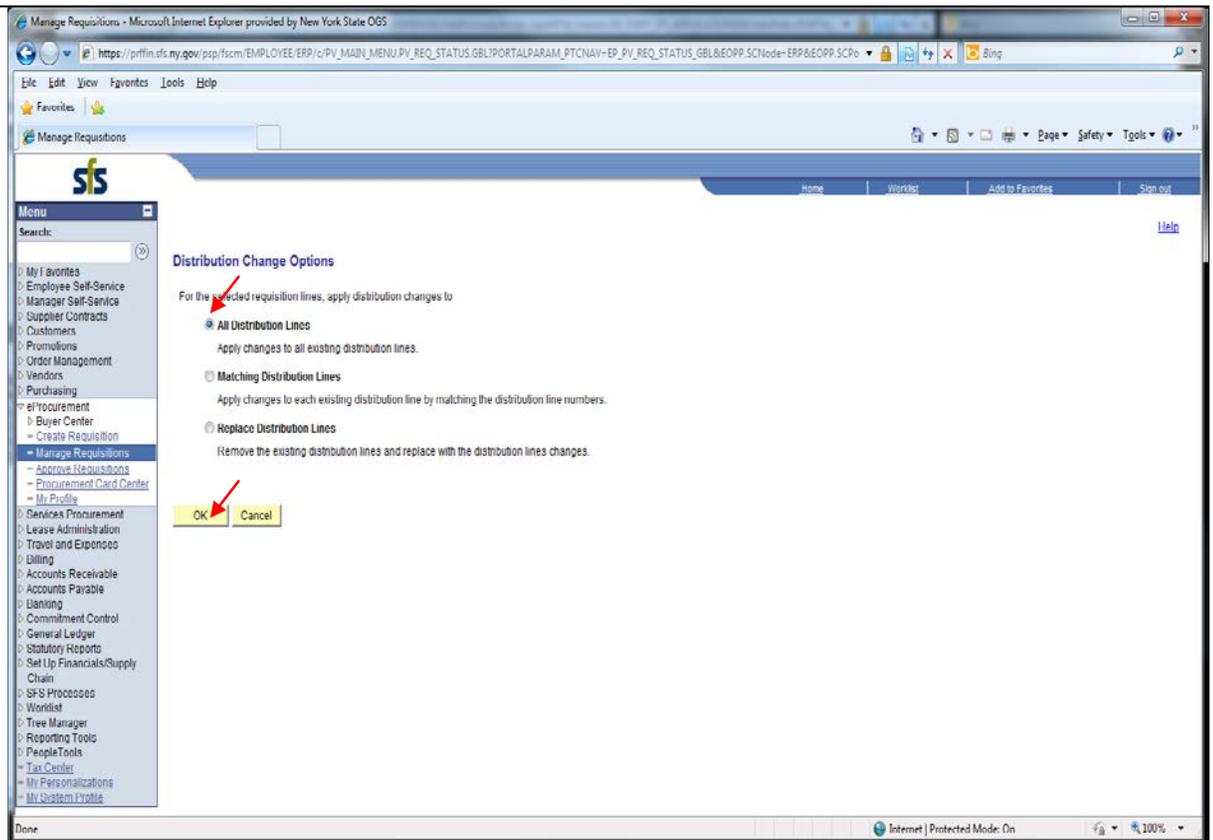


A blank form appears. Enter the information to change that will be used for *all* lines on the requisition.

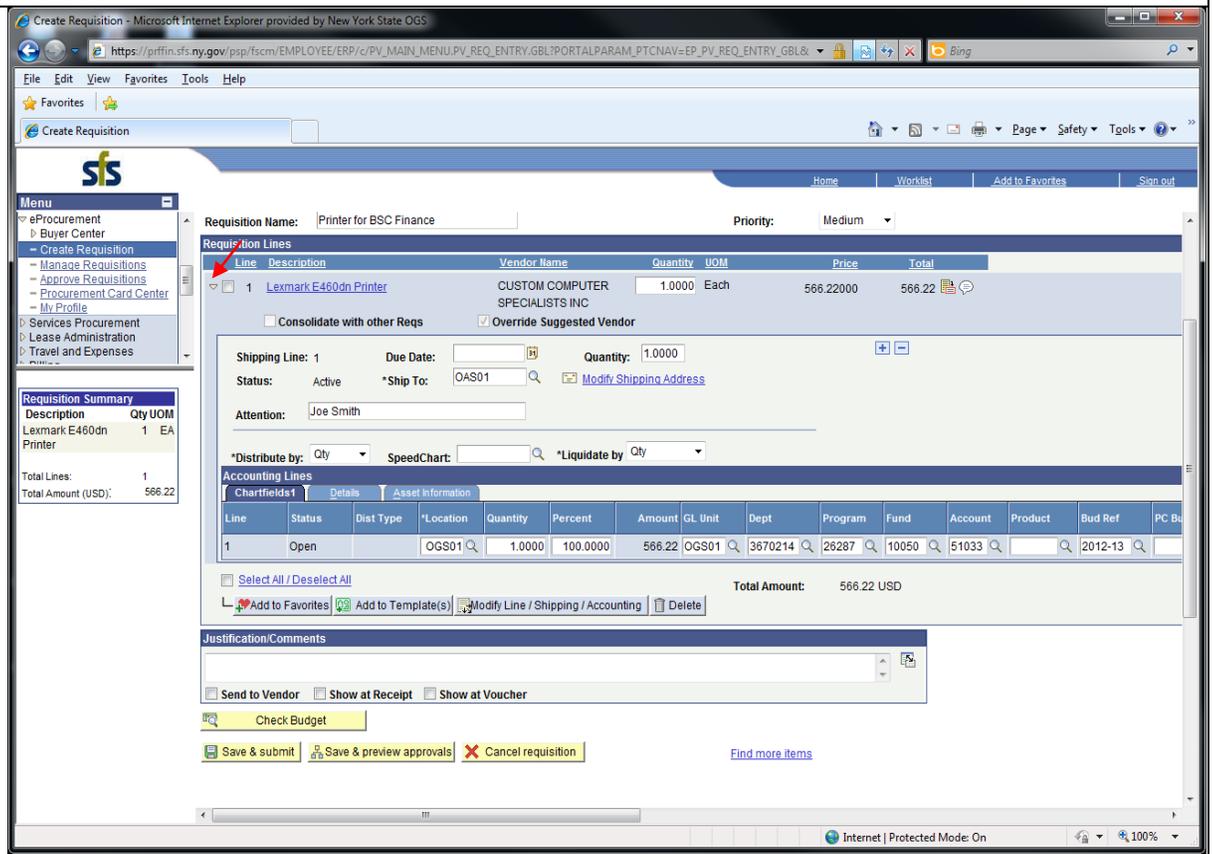
Click **Apply**.



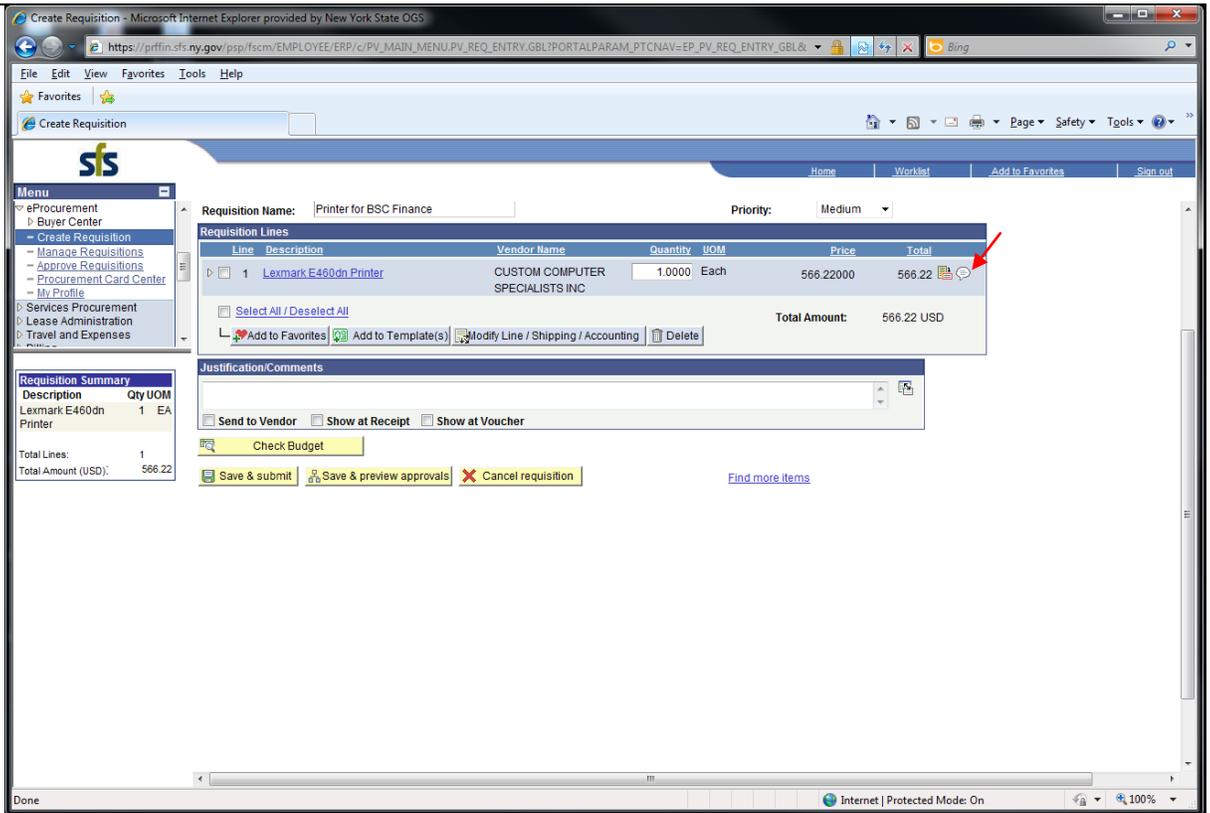
Select the option based on your change. Click **OK**.



This section is used to view and modify individual requisition line and distribution details. After clicking the arrow, the individual requisition and distribution detail display. All fields are available to review and/or edit if necessary. Click the **arrow** to collapse the section when complete.

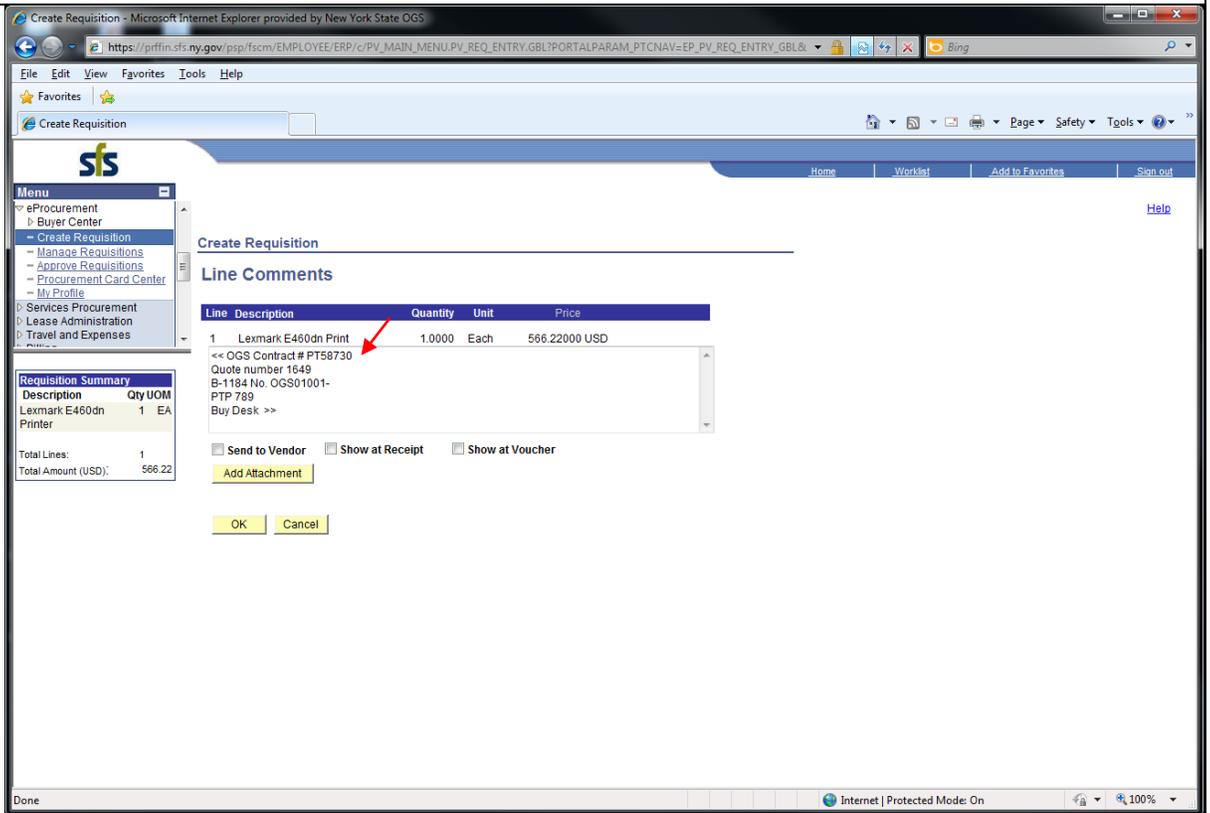


The **Comments** button is used to add line level comments. If the **Comments** button has dots in it, comments have already been entered for this line item.



Line Comments can be printed on a purchase order to be sent to the vendor or displayed during the receiving or invoicing process.

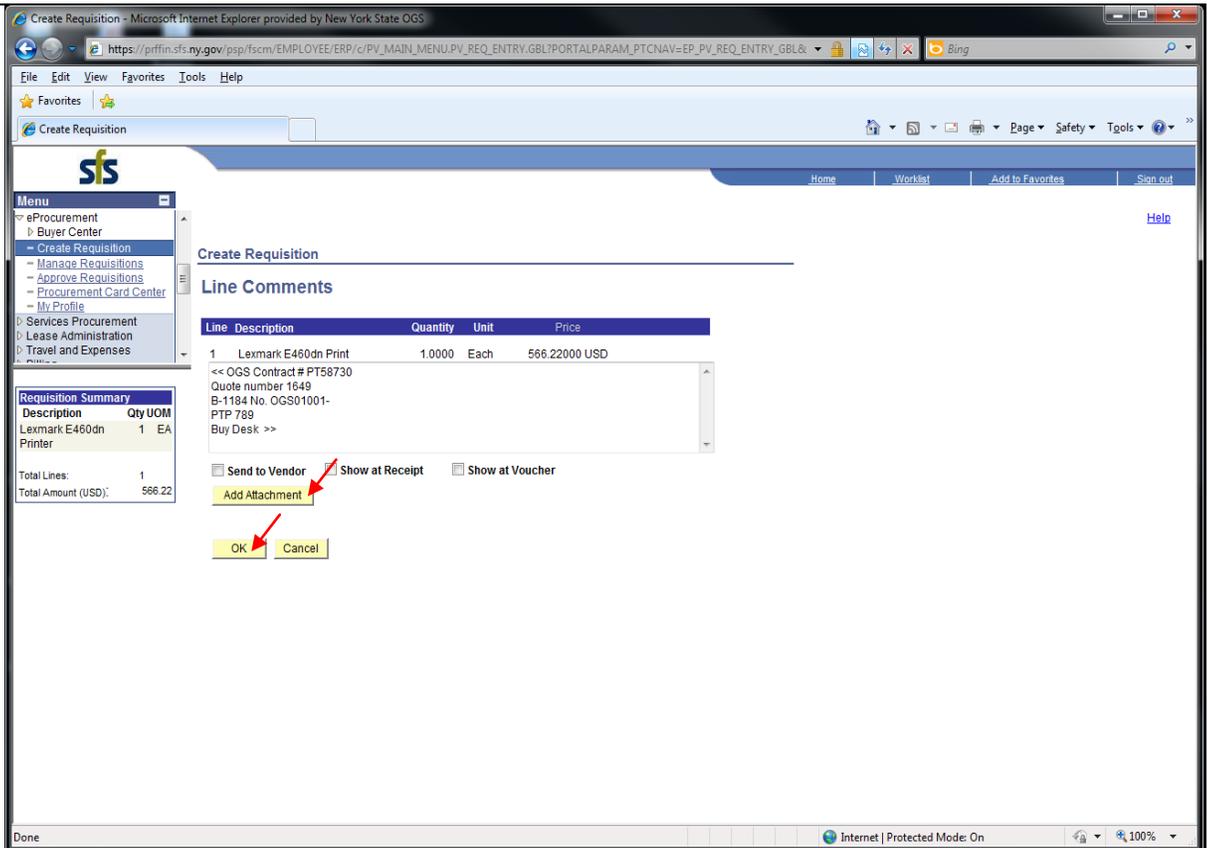
Be sure comments are relevant as the vendor will see them.



NOTE: You can add attachments (i.e. supporting backup including quotes) for your records.

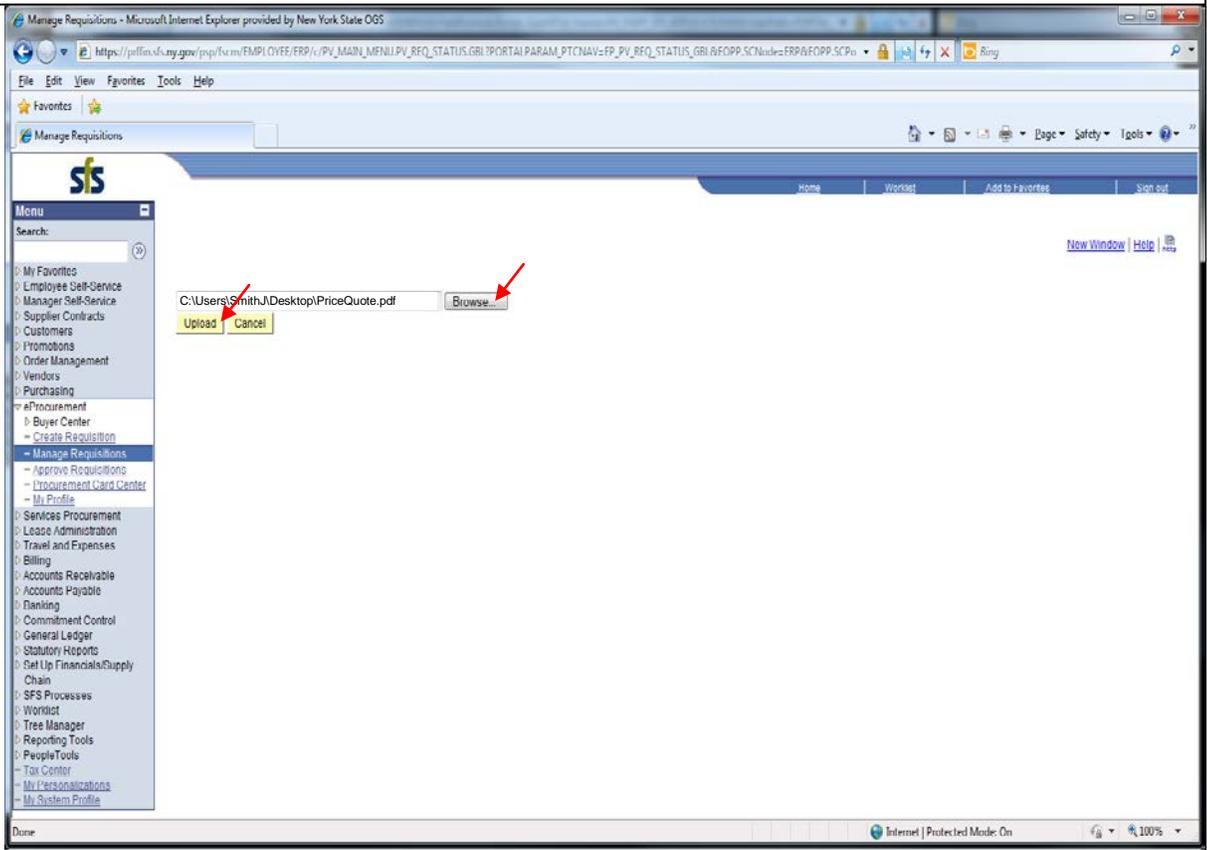
If you are unable to attach, please forward documentation to the BSC at OGSPurchasingUnit@ogs.ny.gov.

Click **OK**.



Browse your computer for the documents you wish to attach.

Click **Upload**.



File is now attached. Select OK.

Manage Requisitions - Microsoft Internet Explorer provided by New York State OGS

https://prfin.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/c/PV_MAIN_MENU/PV_REQ_STATUS.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_STATUS_GBL&EOPP_SCPo

File Edit View Favorites Tools Help

Manage Requisitions

sfs

Home Worklist Add to Favorites Sign out

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My Favorites

Employee Self-Service

Manager Self-Service

Supplier Contracts

Customers

Promotions

Order Management

Vendors

Purchasing

eProcurement

Buyer Center

Create Requisition

Manage Requisitions

Approve Requisitions

Procurement Card Center

My Profile

Services Procurement

Lease Administration

Travel and Expenses

Bidding

Accounts Receivable

Accounts Payable

Banking

Commitment Control

General Ledger

Statutory Reports

Set Up Financials/Supply Chain

SFS Processes

Worklist

Tree Manager

Reporting Tools

PeopleTools

Tax Center

My Personalizations

My System Profile

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Lexmark E460dn Print	2.0000	Each	566.22000 USD

<< OGS Contract #158/30
 Quote number 1649
 B1184 No. OGS01001-
 PTP 769 >>

Send to Vendor Show at Receipt Show at Voucher

Customize | Link | View All | First 1 of 1 | Last

Attached File

File Name	View	Send to Vendor
1 08-2011Attachment_5.pdf	View	<input type="checkbox"/>

Add Attachment

OK Cancel

Line Details displays the individual line and distribution details.

PV Requisitions - Microsoft Internet Explorer provided by New York State OGS

https://prfin.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/c/PV_MAIN_MENU/PV_REQUISITIONS.GBL?Page=Page_PV_REQ_FORM&Action=U&BUSINESS

File Edit View Favorites Tools Help

PV Requisitions

sfs

Home Worklist Add to Favorites Sign out

Menu

eProcurement

Buyer Center

Create Requisition

Manage Requisitions

Approve Requisitions

Procurement Card Center

My Profile

Services Procurement

Lease Administration

Travel and Expenses

Bidding

Requisition Summary

Description	Qty	UOM
Lexmark E460dn Printer	1	EA

Total Lines: 1
 Total Amount (USD): 566.22

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: OGS01 Office of General Services

Requester: smith34 SMITH, JOE M *Currency: USD

Requisition Name: Printer for BSC Finance Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Lexmark E460dn Printer	CUSTOM COMPUTER SPECIALISTS INC	1.0000	Each	566.22000	566.22

Select All / Deselect All

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

Total Amount: 566.22 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget Budget Checking Status: Not Checked

Save & submit Save & preview approvals Cancel Changes Find more items

Sample of Line Details.

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Procurement Card Center
 - My Profile
 - Services Procurement
 - Lease Administration
 - Travel and Expenses
 - Business

Requisition Summary

Description	Qty	UOM
Lexmark E460dn Printer	1	EA
Total Lines:		1
Total Amount (USD):		566.22

Line Details

Line: 1 [Lexmark E460dn Printer](#) Line Status: Open

Item Details

Amount: 566.22 USD

Category: 43212105 Laser printers [View Hierarchy](#)

Buyer: [Buyer Information](#)

Vendor: 1000005692 CUSTOM COMPUTER SPECIALISTS INC [Suggest New Vendor](#)

Vendor Location: MAINCHECK

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID: UPN ID:

Manufacturer's Item ID:

Physical Nature: Goods

RFQ Required Zero Price Indicator Amount Only

Device Tracking Inspection Required

[Configuration Info](#)

Contract

Sourcing Controls

OK Cancel

The Requisition Summary contains the items, quantity, and total amount. It will give you an overview of the entire requisition.

Menu

- Vendors
- Purchasing
- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Procurement Card Center
 - My Profile

Requisition Summary

Description	Qty	UOM
Lexmark E460dn Printer	1	EA
Total Lines:		1
Total Amount (USD):		566.22

Line Details

Line: 1 [Lexmark E460dn Printer](#)

Item Details

Amount: 566.22 USD

Category: 43212105 Laser printers

Buyer:

Vendor: 1000005692

Vendor Location: MAINCHECK

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID:

Justification/ Comments

This section is not required by the BSC. Some agencies require the justification for the purchase and it can be entered here.

You do not have to fill this in unless your agency requires it.

The screenshot shows the 'Edit Requisition' page in the SFS system. The page title is 'Edit Requisition' and it includes a progress bar with three steps: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. The 'Business Unit' is 'OGS01 Office of General Services' and the 'Requester' is 'TOOP01 TOOP, DIANNE L'. The 'Requisition Name' is 'Printer for BSC Finance' and the 'Priority' is 'Medium'. The 'Requisition Lines' table shows one line item: 'Lexmark E460dn Printer' with a quantity of 1.0000, a price of 566.22000, and a total of 566.22 USD. The 'Justification/Comments' section contains the text: 'The printer in the Purchasing unit no longer works and is unable to be fixed. This printer will be used to print purchase orders.' A red arrow points to this text area. Other buttons include 'Check Budget', 'Save & submit', 'Save & preview approvals', and 'Cancel Changes'.

The **Save and preview approvals** button is used to save the requisition to be continued later or to add an additional (ad hoc) approver to the approval chain.

This screenshot is identical to the one above, showing the 'Edit Requisition' page. However, a red arrow points to the 'Save & preview approvals' button at the bottom of the page. The 'Requester' is now 'SMITH, JOE M' and the 'Budget Checking Status' is 'Not Checked'.

The **Cancel requisition** button is used to cancel the requisition if you decide to no longer proceed with this requisition.

Click the **Save & submit** to proceed. This will place the requisition into the work flow.

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Procurement Card Center
 - My Profile
 - Services Procurement
 - Lease Administration
 - Travel and Expenses
 - Business

Requisition Summary

Description	Qty	UOM
Lexmark E460dn Printer	1	EA

Total Lines: 1
Total Amount (USD): 566.22

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Lexmark E460dn Printer	CUSTOM COMPUTER SPECIALISTS INC	1.0000	Each	566.22000	566.22

Total Amount: 566.22 USD

Justification/Comments

The printer in the Purchasing unit no longer works and is unable to be fixed. This printer will be used to print purchase orders.

Send to Vendor Show at Receipt Show at Voucher

Budget Checking Status: Not Checked

The **Confirmation** page displays basic information about the requisition and the number of items it contains. The Confirmation page appears upon submitting for processing or saving the requisition for future use. Note the **Requisition ID** has been assigned (done automatically by SFS). This number will be used for checking the status of the requisition.

The screenshot shows a web browser window displaying the SFS Confirmation page. The page title is "Confirmation". The main content area displays the following information:

- Requested For: SMITH, JOE M
- Requisition Name: Printer for BSC Finance
- Requisition ID: 0000000384
- Business Unit: OGS01
- Priority: Medium
- Budget Status: Not Checked

Summary information:

- Number of Lines: 1
- Total Amount: 566.22 USD

Justification: The printer in the Purchasing unit no longer works and is unable to be fixed. This printer will be used to print purchase orders.

All Requisition Approvals

Printer for BSC Finance: Pending

Agency Requisition Approval

Pending: MILLER, PHILIP J (Requester's Supervisor)

Skipped: No Approvers Found (Department Manager)

Skipped: No Approvers Found (Procurement Manager)

Not Routed: Multiple Approvals (Budget Unit)

Not Routed: Multiple Approvals (Finance Office)

Not Routed: Multiple Approvals (Buyer)

Buttons: Edit Requisition, Approve/Cancel, Check Budget

Links: View printable version, Manage Requisitions, Create New Requisition

You have successfully completed creating a requisition. The purchase requisition is now in the approval process and has been forwarded to your immediate supervisor.