

**E-Procurement Job Aide**

**Instructions for Editing Chartfield Information on Requisitions**

**Step 1**: Log in to CUNYfirst using your designated ID and password.

**Step 2**: Select Financial Supply Chain link in the menu box after logging in.

**Step 3**: Click the e-Procurement link.

**Step 4:** Click the Manage Requisitions link and Fill out the following fields:

**Business Unit**: YRK**PR**

**Requisition ID**: 000000xxxx (x =’s the requisition #)

**Date Range:** **To** (use fiscal year parameters 7/1/**xx**) & **From** (use current date)

Note: You can also search for all the requisitions created by using the Requestor ID field or search for a particular PO, by using the PO ID field if preferred.

**Step 6**: Click the Search button.

**Step 7**: To view the chartfield codes (string) associated with the first line item of the requisition, click on the requisition link to go to the **Requisition Details** page, then clicking on the **"Requisition Schedule and Distribution"** link at the bottom right of the page. On this page, the chartifled codes will be listed in the **Distribution section** of the page, under the “Details” and “More Details” tabs.

Note: Requisitions with multiple line items will all have the same chartfield codes associated with them (with the exception of the Account Code), unless manually edited through the “Edit Requisition” function.

**Step 8**: After viewing the chartfield codes and identifying which one(s) is/are incorrect, click the “**Return to Previous Page**” link on the bottom left of the page and then click the yellow “**Edit Requisition**” button to make your corrections.

 **Note:** Once you access Edit Requisition screen from the drop down menu options on the Manage Requisitions page, you will get a dialogue box that will inform you if there is an error with the requisition; click ok.

**Step 9:** Click box at bottom left of the requisition lines box to “Select All/Deselect All” items on the requisition, then proceed to click the “Modify Line/Shipping Accounting “button at the bottom of the section.

**Step 10**: Click the second tab labeled “**Chartfield 2**,” tab where you will be brought to a screen called “**Distribution Change Options**,” from there you can edit the Chartfield codes.

**E-Procurement Job Aide (Cont’d)**

**Step 11**: Enter data for all fields that need editing:  **Oper Unit:** xxxx        **Fund:** 1x      **Dept:** xxxxx     **Program:** xxxxx

**MP:** xxx    **Special Initiative** (**Sp Init):** xxxx (click the **“Chartfields 3”** tab) enter the **Funding Source (Fnd Src):** xxxxxx.

**Note:** A chartfield string is connected to each Budget Account established. Each Requestor was created with a specific chartfield string linked to their profile, (which is based on the chartfield information listed on pg. 2 of the Procurement User Access Form). To ensure the proper code is established for a new user, bring the form to the Budget Office to fill out or review if already filled out. If you need to access a **Budget Account** with a different chartfield than your default string (i.e. Special Funding), you must edit those fields through this process.

**Step 12**: Click the Apply button and when brought to the “**Distribution Change Options**” screen, select the “Matching Distribution Line” option.

**Step 13**: You will be brought back to the PV Requisition named “Edit Requisition;” Click the Save & Submit button at the bottom left of the screen.

**\*Note: if you get a message after Step 13, stating “Warning – The Accounting Date is not Open,” simply click on hitting the “Ok” button until it stops popping up (can take a few attempts).**