

MyServices Procurement Handbook

[Sign Into MyServices](#)

[Create a Requisition](#)

[Approve a Requisition
\(Approvers Only\)](#)

[Modify a Requisition](#)

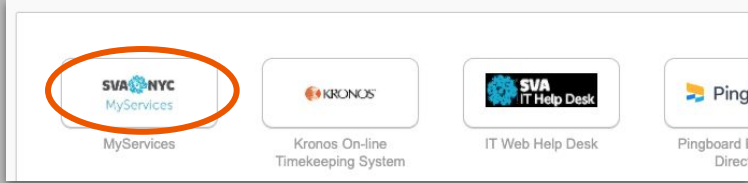
[Delete a Requisition](#)

[Receive Goods/Services](#)

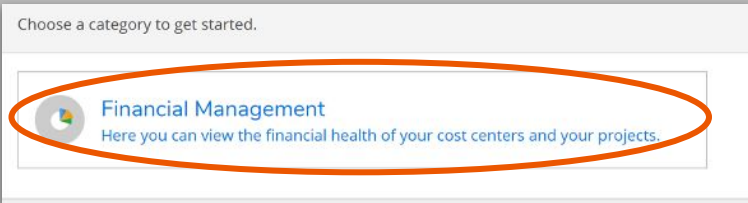
Sign Into MyServices

Sign Into MyServices

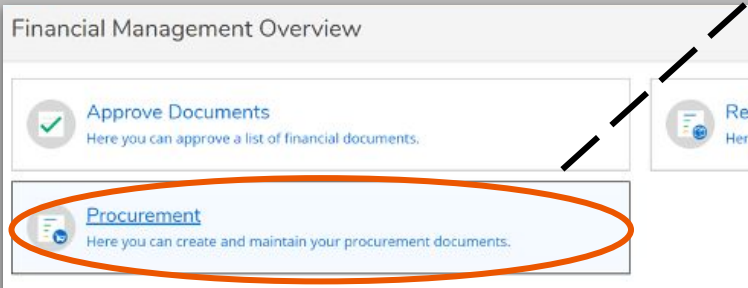
- 1 Sign into myid.sva.edu dashboard and select MyServices



- 2 Select Financial Management



- 3 Select Procurement



Steps 1 through 3 will take you to the Procurement Dashboard (shown below). This is where previous requisitions and purchase orders can be viewed and managed.

The screenshot shows the 'Procurement' dashboard. It has tabs for 'View' and 'Create'. Below the tabs is a 'Filter' button and a 'Collapse All' button. The 'Document Types: Requisition, Purchase Order' is displayed. The dashboard is divided into two main sections: 'Requisition' and 'Purchase Order'. Each section contains a table of items.

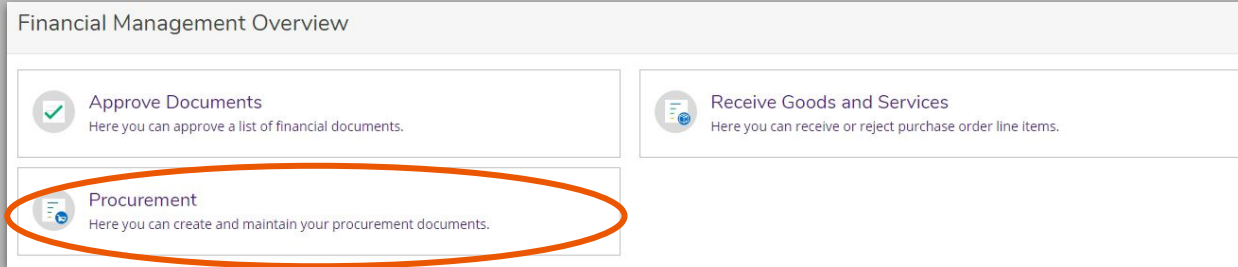
Requisition Date	Requisition	Total	Approvers/Next Approvers
3/1/2021	0087959 Outstanding	\$1.09	LISA BROWN
2/26/2021	0087956 Outstanding	\$1.09	JASON GALLEGOS

Purchase Order Date	Purchase Order	Total	Approvers/Next Approvers
2/11/2021	P0074554 Outstanding 0545580 Uline	\$10.89	CHRISTOPHER GUTIERREZ

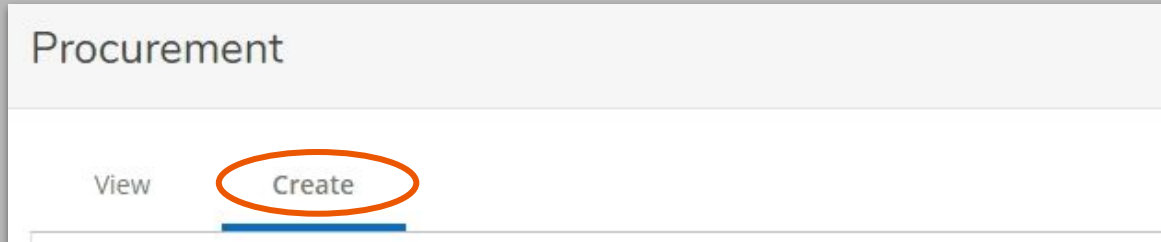
Create a Requisition

Create a Requisition

1 Select Procurement in the Financial Management Overview



2 Click on the Create tab on the upper left portion of the screen



(Continue to Next Page)

Create a Requisition: Data Entry

3 Fill out all entry fields shown below before proceeding to the next section

Procurement

View Create

Document Type *

Requisition

Requisition Date *

02/18/2021

Created By

Usa Yamaguchi

Confirmation Email Address *

Add Confirmation Email Address

Add the email addresses of the people to be notified when this requisition is created.

Ship To *

23 School of Visual Arts***209 East 23rd Street

Desired Date

MM/DD/YYYY

Vendor

Search by Vendor ID or Vendor Name...

TIP: Enter vendor name or ID number. If the vendor is new to the system, leave the field blank and provide a W9 form as backup documentation.

TIP: This field will auto-populate with your email address. Feel free to add any other SVA employees so they may also be notified of your activity.

TIP: Enter the email prefix of your dept head and select your approver(s) from the dropdown menu so they will receive an email to approve your request.

Next Approvers*

Next Approver Lookup

Enter the name of your department head or person who will approve this requisition. If you are the department head, enter your own name.

Approvers

Approval Date

Delivery Comments *

TIP: Add any additional requests you would like to have communicated to the Purchasing team. (ex. Specify a payment plan, discounts, splitting of expenses with other depts, etc.)

Enter Department, phone and room number of delivery destination. These comments will show up on the PO that the vendor will receive.

Instructions For Purchasing Department

(Continue to Next Page)

Create a Requisition: Add Line Item Detail

4 Fill out all entry fields below

Items

Line Items	Description	Quantity	Unit	Price	Extended Price	
------------	-------------	----------	------	-------	----------------	--

New Item

Description *

Quantity *

Unit

EA

Price

Extended Price

\$0.00

GL Account *

Enter 1 to see GL Account listing, or type in the department/expense code nam: 🔍

Project

None

Cancel

Add Item

GL Account *

1101018

1-101018-5051010
Photography & Video : Faculty salaries

1-101018-5051011
Photography & Video : Faculty salaries

1-101018-5051020

Cancel

Save

5 ADD ITEM if you are requesting multiple items or payments in an order


6 Click SAVE to submit your completed requisition


Approve a Requisition


Approve a Requisition

1 Select Approve Documents in the Financial Management Overview

Financial Management Overview

**Approve Documents**
Here you can approve a list of financial documents.

**Receive Goods and Services**
Here you can receive or reject purchase order line items.

**Procurement**
Here you can create and maintain your procurement documents.

2 To review a specific requisition, click on the requisition number and you will be taken to a detailed summary page

Requisitions			
Approve	Requisition / Vendor	Date	Total
<input checked="" type="checkbox"/>	0087960 PWA Casino Store	3/9/2021	\$226.46
<input type="checkbox"/>	0087940 Backhaul Industries, Inc	2/11/2021	\$5.44


(Continue to Next Page)

Approve a Requisition

- 3 The summary page will appear. Once you are done reviewing, close window to return to Approval Dashboard.

Requisition 0087960

Status	Not Approved	Date	3/9/2021
Vendor ID	0114782 SVA Campus Store	Status Date	3/9/2021
Amount	\$226.46	Desired Date	3/31/2021
Maintenance Date	3/9/2021		
Created By	Christopher Gutierrez		
Requestor	Christopher Gutierrez		
Associated Documents			
Attachments	No Attachments		

Delivery Comments	Approvers	Approval Date
3rd floor, room 302A 212.592.2605	 CHRISTOPHER GUTIERREZ	Awaiting Approval

Instructions For Purchasing Department

50% deposit due upfront/50% upon completion

Line Items	Description	Quantity	Unit	Price	Extended Price
1	apple magic mouse - black #MB1234	1	EA	\$79.0000	\$79.00
2	apple numeric keyboard - black #MB5778	1	EA	\$129.0000	\$129.00

- 4 Once you are ready to approve, check the box next to the requisition(s) you'd like to proceed with and click SUBMIT. The requisitioner and the Purchasing team will be notified via email of your approval.

Requisitions

Approve	Requisition / Vendor	Date	Total
<input checked="" type="checkbox"/>	0087960 SVA Campus Store	3/9/2021	\$226.46
<input type="checkbox"/>	0087940 Backhaul Industries, Inc	2/11/2021	\$5.44


Submit


Modify a Requisition


Modify a Requisition

1 Select Procurement in the Financial Management Overview

Financial Management Overview


**Approve Documents**
Here you can approve a list of financial documents.

**Receive Goods and Services**
Here you can receive or reject purchase order line items.

**Procurement**
Here you can create and maintain your procurement documents.


2 Select an outstanding requisition number that you would like to modify

View Create

 Filter Collapse All

Document Types: Requisition, Purchase Order

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
2/26/2021	<u>0087956</u> Outstanding	\$1.09	 JASON GALLEGOS


(Continue to Next Page)

Modify a Requisition

- 3 Upon selection, a pop up box will appear on the right side of your dashboard. Click on the pencil icon to modify your existing request.

Requisition Details

0087960

 [Delete](#)

Overview

Approvers

Line Items

Status

Not Approved

Vendor

0114782 SVA Campus Store

Amount

\$226.46

Maintenance Date

3/9/2021

Initiator

Christopher Gutierrez

Requestor

Christopher Gutierrez

Attachments

Additional Details

Delivery Comments


3rd floor, room 302A 212.592.2605

Instructions for Purchasing Department

50% deposit due upfront/50% upon completion

Requisition Details

0087940

 [Delete](#)

Overview

Approvers

Line Items

Status

Not Approve

Vendor

1460612 Bac Industries, In

(Continue to Next Page)

Modify a Requisition

4

You may modify any of the fields shown below.

ViewModify

Requisition Number 0087959

Status Outstanding

Created By
Usa Yamaguchi

Requisition Date 3/1/2021

Status Date 3/1/2021

Confirmation Email Address *

uyamaguchi@sva.edu

Add the email addresses of the people to be notified when this requisition is created.

Ship To *

23 School of Visual Arts***209 East 23rd Street

Vendor

Search by Vendor ID or Vendor Name...

Desired Date

Next Approvers*

Next Approver Lookup

Enter the name of your department head or person who will approve this requisition. If you are the department head, enter your own name.

Approvers	Approval Date
✓ LISA BROWN	3/1/2021

Delivery Comments *

hello

Enter Department, phone and room number of delivery destination. These comments will show up on the PO that the vendor will receive.



Instructions For Purchasing Department

(Continue to Next Page)

Modify a Requisition: Edit Line Item Details

- 5 To **MODIFY** a line item, select the pencil icon to revise any entry fields shown below.
To **DELETE** a line item, select the red minus sign next to the item.

Items

Line Items	Description	Quantity	Unit	Price	Extended Price	
1	hello	1.000	EA	\$1.0000	\$1.00	 

Edit Item

Description *

hello

Quantity * Unit Price * Extended Price

1.000 EA 1.0000 \$1.00

GL Account * Project Amount *

1-102060-5400510 1-102060-5400510 MPS Digital Photography : Supplies None 1.00

Additional Details

Cancel **Update Item**

Cancel **Save**

MODIFY **DELETE**

- 6 If modifying a line item, select **UPDATE ITEM** once revisions are complete.

- 7 Click **SAVE** to submit your completed modifications.

(Continue to Next Page)

Modify a Requisition: Edit Line Item Details

8 To ADD a line item, select ADD ITEM

Items

Line Items	Description	Quantity	Unit	Price	Extended Price	
<div>Add Item</div>						

9 Fill in all entry fields shown below

New Item

Description *

Quantity * Unit Price Extended Price

GL Account * Project Amount

Cancel Add Item

Cancel Save

10 Select ADD ITEM


11 Click SAVE to submit your completed modifications


Delete a Requisition


Delete a Requisition

1 Select Procurement in the Financial Management Overview

Financial Management Overview

 **Approve Documents**
Here you can approve a list of financial documents.

 **Receive Goods and Services**
Here you can receive or reject purchase order line items.

 **Procurement**
Here you can create and maintain your procurement documents.

2 Select an outstanding requisition number that you would like to modify

View Create

Filter Collapse All

Document Types: Requisition, Purchase Order

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
2/26/2021	0087956 Outstanding	\$1.09	✓ JASON GALLEGOS

(Continue to Next Page)

Delete a Requisition

3 Upon selection, a pop up box will appear on the right side of your dashboard. Click DELETE.

Requisition Details

0087960 | [Delete](#)

Overview

Approvers

Line Items

Status

Not Approved

Vendor

0114782 SVA Campus Store

Amount

\$226.46

Maintenance Date

3/9/2021

Initiator

Christopher Gutierrez

Requestor

Christopher Gutierrez

Attachments

Additional Details

Delivery Comments

3rd floor, room 302A 212.592.2605

Instructions for Purchasing Department

50% deposit due upfront/50% upon completion

Requisition Details

0087940 | [Delete](#)

Overview

Approvers

Line Items

Status

Not Approve

Vendor

1460612 Bac Industries, In

(Continue to Next Page)

Delete a Requisition

- 3 Upon selection, a window will ask you to confirm your decision. Click on DELETE REQUISITION. A pop up will appear on the upper right hand corner of the screen to confirm that the requisition was successfully deleted.

Delete Requisition

0087959

Confirmation Email Address

uyamaguchi@sva.edu

Add multiple email addresses separated by comma

Cancel Delete Requisition


✓ Requisition Number 0087959 is deleted successfully. ✕


Receive Goods & Services


Receive Goods and Services

1 Select Receive Goods and Services in the Financial Management Overview

Financial Management Overview

 **Approve Documents**
Here you can approve a list of financial documents.

 **Receive Goods and Services**
Here you can receive or reject purchase order line items.

 **Procurement**
Here you can create and maintain your procurement documents.

2 Enter the quantity received for each item under the Qty Accepted column. If you received all orders in full, select Accept All to account for all items. Click SUBMIT to confirm receipt.

Procurement Receiving

Receive Goods and Services

Choose a Vendor and/or PO to filter lines shown:

Vendor

Purchase Order Number

TIP: The vendor search bar and the dropdown menu help you sort through your list of outstanding PO's. These filter tools will help you locate specific data and prevent errors.

☐ Accept All

Vendor/ Document	Item	Quantity	Qty Accepted
Uline (0545580) P0074554	hello	1,000 EA	<input type="text"/>

TIP: Only enter the quantity of items received in good condition so payment can be made accordingly. You may revisit the screen to accept additional quantities as they are received.

Submit