

Creating a Software Purchase/ Renewal Requisition

All software purchases or renewals require the completion of the **Software Purchases and Renewals** form in CUNYBuy. This includes:

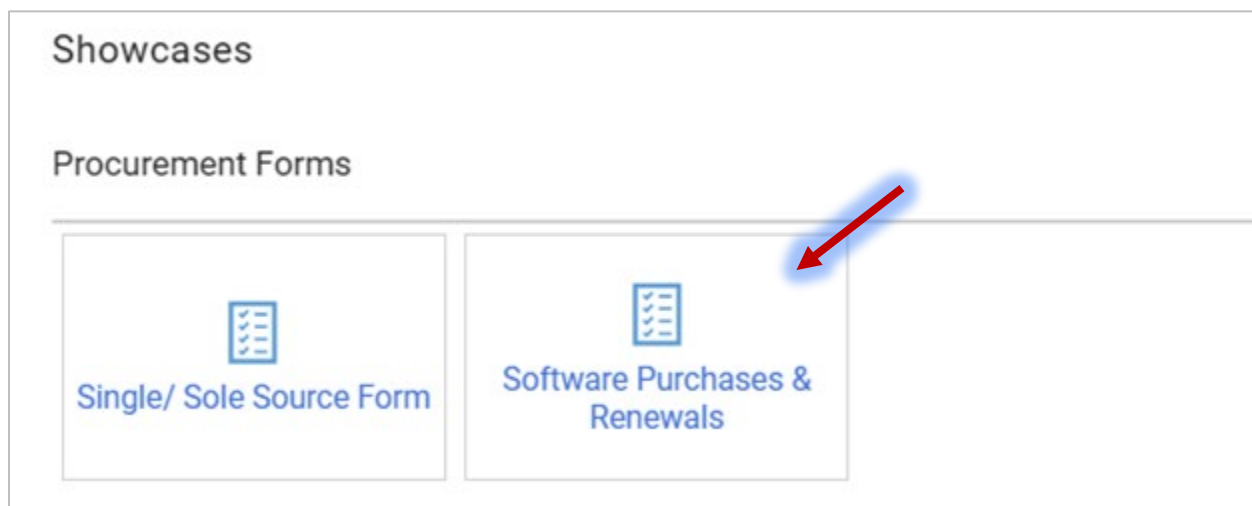
- Software as a Service (SaaS). There can be customization and it must be cloud or web-based.
- COTS known as commercial off-the-shelf software or non-SaaS software. It must require minimal customization and be installed and run on CUNY-owned or CUNY-managed device(s) such as desktop, laptop, tablet, or server.

The above purchases and or renewal must meet the following criteria:

1. Must include license agreement with a scheduled expiration date.
2. Contractual agreement cannot exceed a five-year term.

CUNYBuy Instructions for a Software Purchase or Renewal Requisition

1. Log into CUNYBuy.
2. From the home page in CUNYBuy, scroll to the **Showcases** section and select the **Software Purchases & Renewals** tile under the **Procurement Forms** heading.



3. In the **Order Information** section, complete all mandatory fields.
 - **Enter Supplier:** Start typing and select an existing supplier from the dropdown menu. You may search for a supplier using the **Select Supplier Search** icon.
 - **Quantity:** Enter the number of copies of the software.
 - **Estimated Cost:** Enter the cost of the software per one unit.

- **Category Code:** Be sure to select the correct category code based on whether the software is SaaS or Non-SaaS.
- **Product Description:** Provide a brief description of the software.

Order Information ?

If the supplier is not known, use the supplier record 'Supplier Not Known/To Be Sourced' below.

Existing Supplier

Enter Supplier [★] X 🔍

ARTICULATE GLOBAL LLC STATE ✔

Quantity [★]

Estimated cost of the requested software [★]

Category Code [★] X 🔍

Please select one of the following category codes:

- 4323000001 - IT Software Licenses (Non SAAS) & Support
- 8111180500 - SAAS - Subscription Licenses & Support

Product Description [★]

4. In the **Software Information** section, complete all mandatory fields.

- **Functions and Uses:** Describe the functionality and use of the requested software.
- **Specific Product:** Explain the unique functions of the software requested, if a particular software is being requested.
- **Name, email, and phone number of the requesting individual.**
- **Will the software run on a CUNY computer?** Select the **Yes** or **No** radio button.
- **Software Functionality:** Select the checkboxes of all functionalities that apply.

Does the Requested Software's Functionality Include: (Check all that apply)

User Authentication
 CUNYFirst or other Enterprise-Wide System Integration
 Web Accessibility Features

Software Information

Please describe, in detail, the functions and uses of the requested software [★]

1000 characters remaining expand | clear

If a particular product is being requested, please explain the unique qualities of this product:

1000 characters remaining expand | clear

Please provide name, email and phone number of the person requesting the software.

1000 characters remaining expand | clear

Is this software installed and run on a CUNY owned or managed computer/laptop? [★]

Yes
 No

5. In the **Renewal Information** section, complete all mandatory fields.
 - **Are you or your department currently using the requested software:** select the **Yes** or **No** radio button.
 - **Previous Purpose Order Number:** Provide last PO number if this software has been used before.
 - **Previous Agreements:** Enter any previous agreements if the software has been used before.
 - **Is this a renewal for a contract that is paid annually:** Select the **Yes** or **No** radio button.
 - **Does the contract for the requested software expire this year:** Select the **Yes** or **No** radio button.

Renewal Information

Are you currently using or does your department currently own the requested software? *

Yes
 No

If yes, please provide the Purchase Order Number from the previous procurement

If yes, please provide any agreements that were established from the previous procurement

1000 characters remaining expand | clear

Is this a renewal for a contract that is paid annually? *

Yes
 No

Does the contract for the requested software expire this year? *

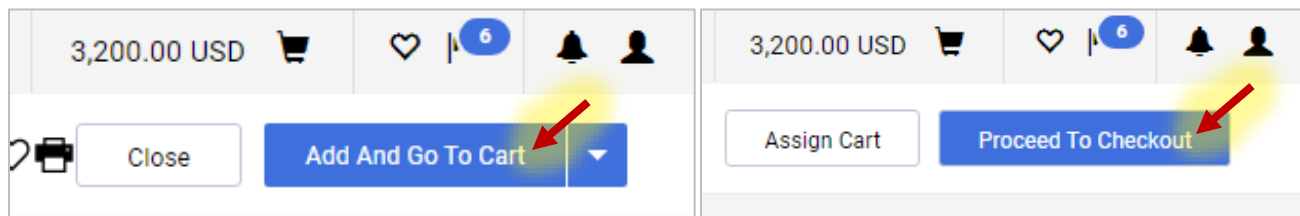
Yes
 No

6. Attach any additional supporting documents in the **Support Documentation** section by clicking the **Add** link.

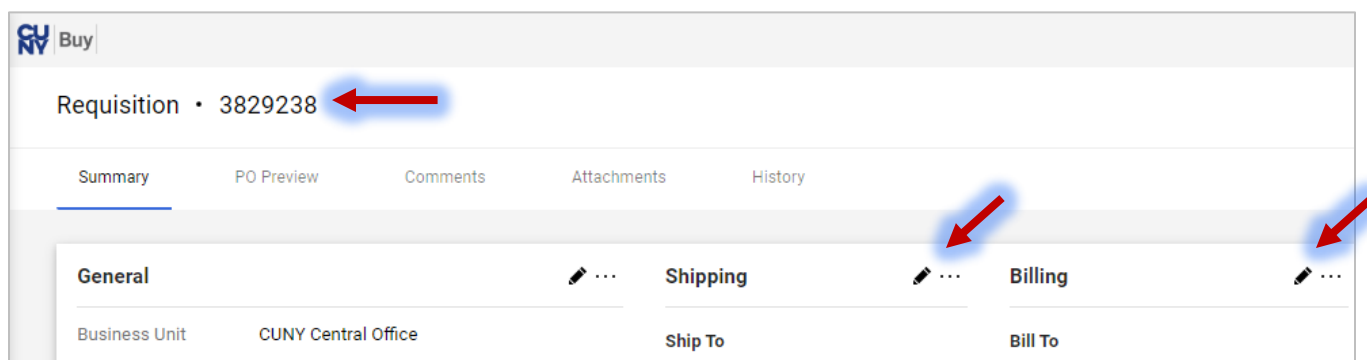
Support Documentation ?

Internal Attachments [Add](#)

- Once the form is completed, click on the **Add And Go To Cart** button in the top right of the form.
- Click the **Proceed to Checkout** button in the top right of the screen.



- A requisition number has been assigned. Follow the standard requisition creation process including **Shipping**, **Billing**, and adding the correct chartfields for this requisition.



Creating Multiple Line Software Purchase/Renewal Requisitions

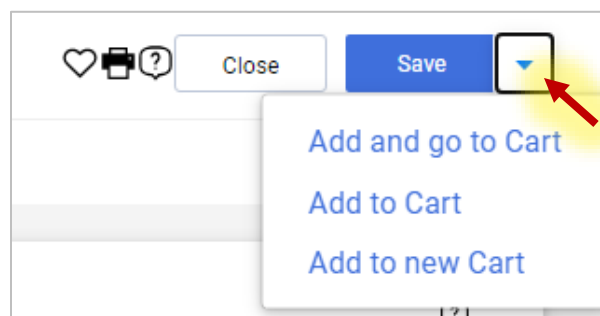
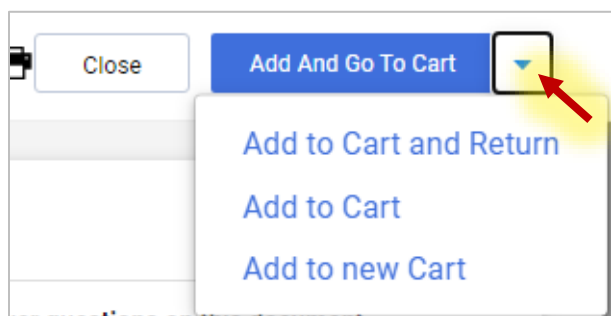
Creating a multiple line software or renewal requisition follows the above process, however, instead of clicking the **Add And Go To Cart** button, click on the down arrow next to the **Add And Go To Cart** button to display the following menu options:

Add to Cart and Return – This will add the form to your cart and return you to a blank form to be filled out again.

Add to Cart – This will add the form to your cart and create an exact copy of the submitted form for you to work in.

Add to new Cart – Adds the present form to a new cart and the previous cart becomes a draft cart.

Once you have chosen one of these options, the **Add And Go To Cart** button is replaced with the **Save** button. This option saves any changes you make to the form, but does not add an additional form to your cart. Select the **Add and go to Cart** option from the dropdown menu to add the additional form and view your cart.



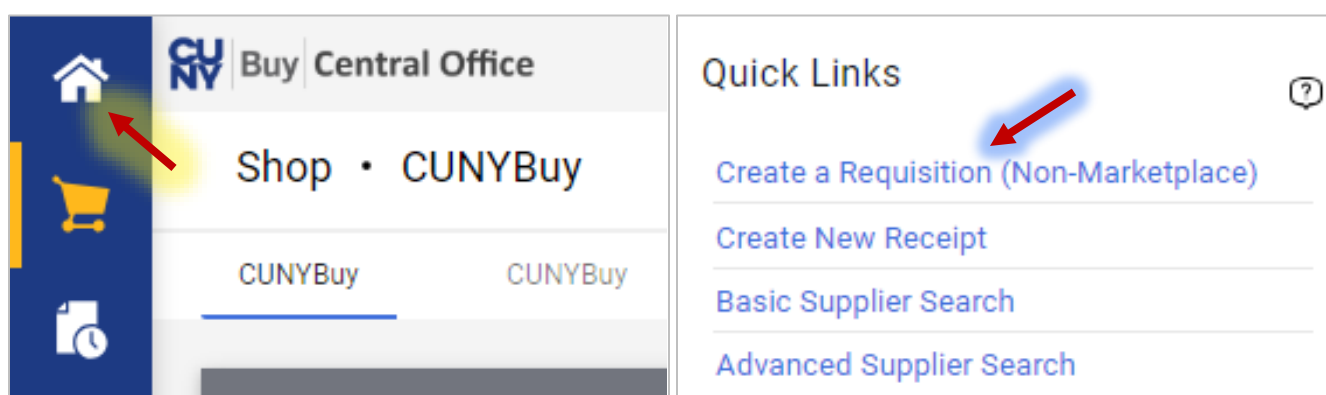
Adding Hardware to a Software Requisition

You can add hardware to the same software requisition, under the following circumstances:

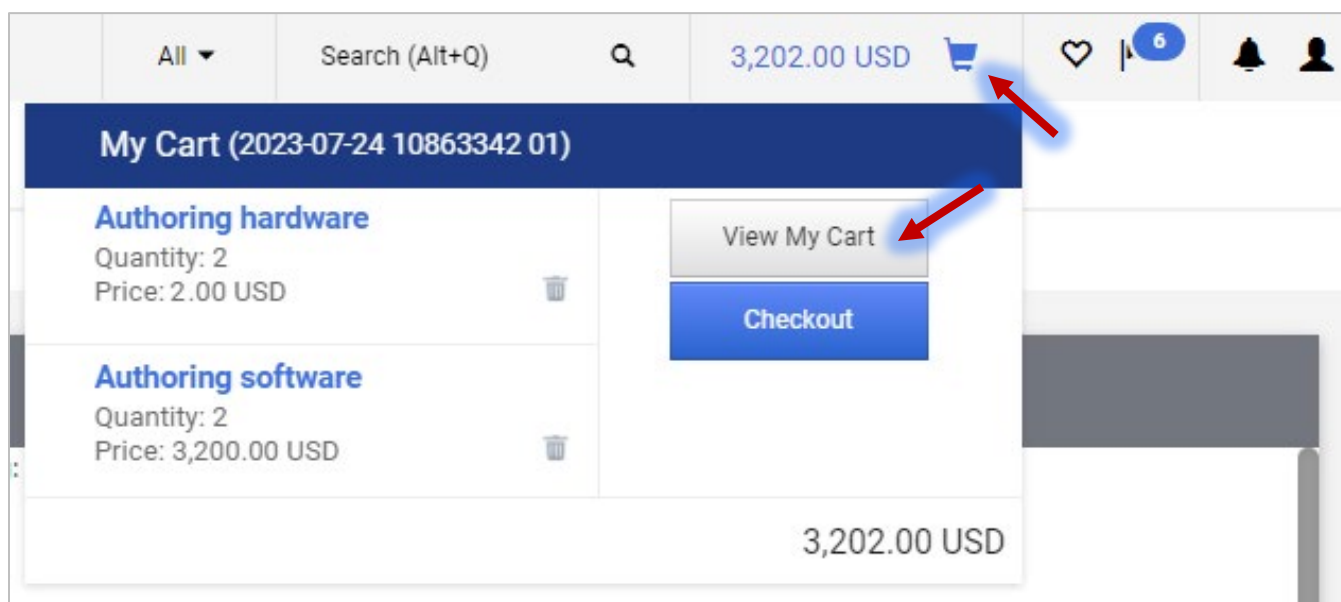
- The software requisition is created first (as directed above) **AND**
- The hardware must come from the same vendor.

Once you have created your software requisition and clicked Proceed To Checkout, you will be brought to the requisition screen, where you must enter in the justification, shipping, billing, and accounting codes. Before addressing these items, you will add the hardware by adding a non-market requisition to this software form. Note that the cart shows the software requisition amount.

1. Click the **Home** icon.
2. Select the **Create a Requisition (Non-Marketplace)** option from the **Quick Links** section.




3. Fill out the **Create a Requisition (Non-Marketplace)** form and click the **Save** button.
4. You can access both of the requisition forms by clicking on the Shopping Cart icon in the top-right corner of the page and clicking the **View My Cart** button.




Different Chartfields For Multiple Line Requisitions


For multiple line software or renewal requisitions with different chartfields per line, you **must** change the chartfield on each item line at checkout.



1. Navigate to the Summary tab of your requisition and scroll down to **Accounting Codes**.
2. You must start by entering the chartfield in the **Accounting Codes** section by clicking on the **Edit Accounting Codes Section** icon. This chartfield will be applied to all line items.


Accounting Codes 							
GL Unit	Operating Unit	Fund	Department	Program	Major Purpose	Special Initiative	Funding Source
CTY01	9999	10	80274	99999_CTY	350	9999	999999_CTY
GL Business Unit	OU not applicable	Unrestricted Tax Levy	Security Operations	PC not applicable	Institutional Support	SI not applicable	FS not applicable

3. Scroll down to the Line Items section and click the **Line Item Actions** ellipses icon. Select **Chartfield(s)** from the dropdown menu.

ALL STAR SOFTWARE SYSTEMS · 2 Items · 10,000.00 USD 


▼ SUPPLIER DETAILS STATE 

Status	Item	Item Number	UOM	Unit Price	Quantity	Ext. Price	
1	 SOFTWARE YOU DOWNLOAD			5,000.00	Qty: 1	5,000.00	

ITEM DETAILS 

Contract (CUNY City/State Contracts OR State OGS Contracts)	no value	Internal Note	no value
Contract Reference (For Non-CUNY Contract OR City/NTL OGS Contract Use)	no value	Internal Attachments	Add
Category Code	8111180500 / IT Software Licenses (non SaaS) & Support	External Note	no value
Account	55007 Computer Software	Attachments for supplier	Add

Override

- [Supplier](#)
- [General](#)
- [Delivery Options](#)
- [Chartfield\(s\)](#) 
- [PO Information](#)




Remove

[Add to Favorites](#)


[Move to Another Cart](#) >

4. Enter the new chartfield in the **Override Line: Chartfield** box and click the **Save** button.

Override Line 1: Chartfield ✕

GL Unit *	Operating Unit *	Fund * 	Department *	Program * 	Major Purpose *	Special Initiative *	Funding Source * 
<input type="text" value="1"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

+ ✓

★ Required fields  Save Close

5. Once all the chartfields have been entered into each line item, continue the requisition process by clicking on the **Submit request** button in the top-right of the page.