

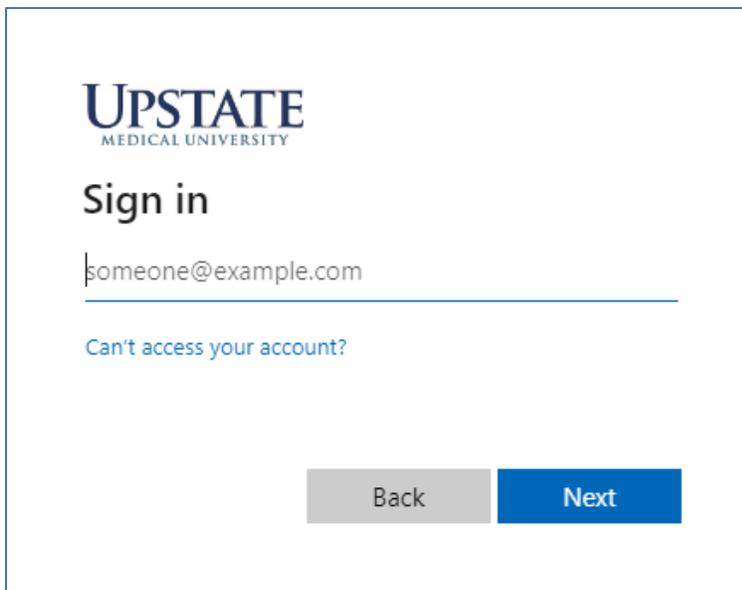
How to Gain Access to Submit a Requisition on Self Serve

8/16/22

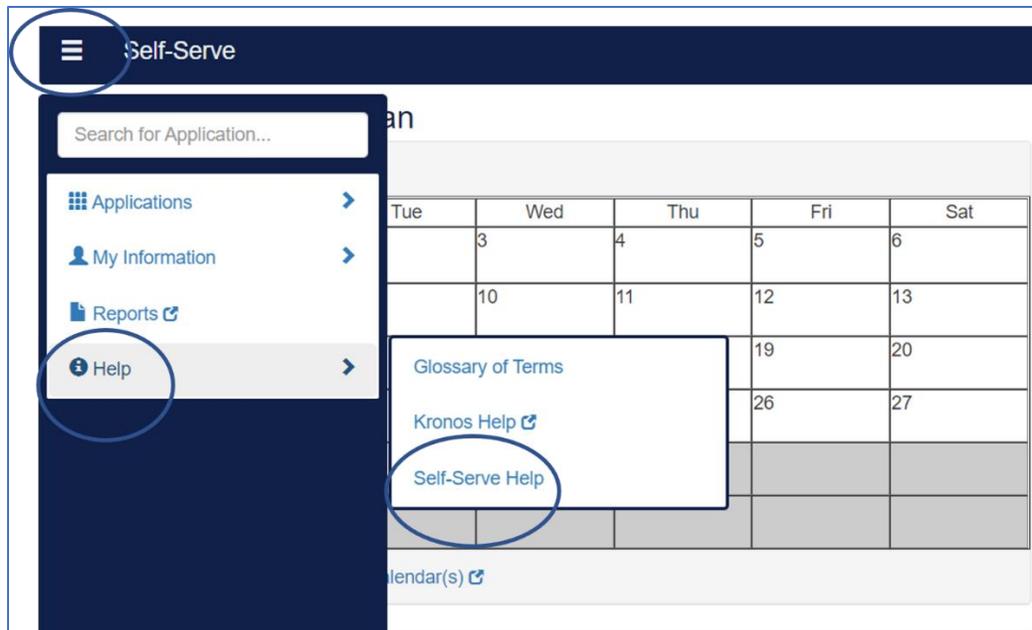
On the Upstate iPage, click on the Self Serve icon.



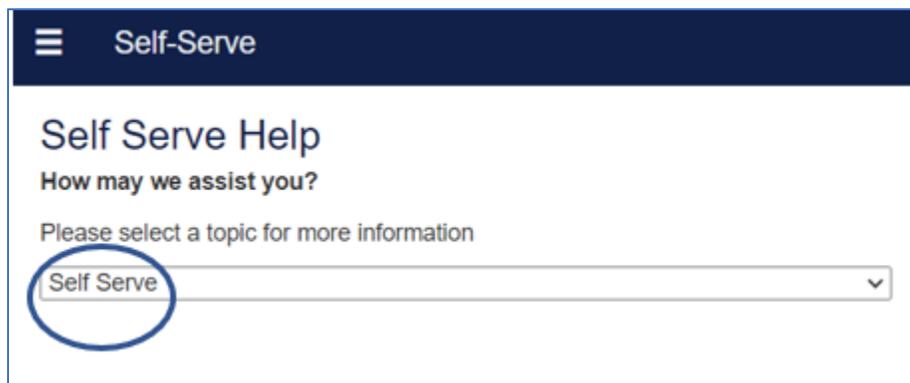
Log in with username and password.



Once you are on the main page in Self Serve, click on the “hamburger tile” on top left side of page to open the Help feature. Click on Help > Self Serve Help.



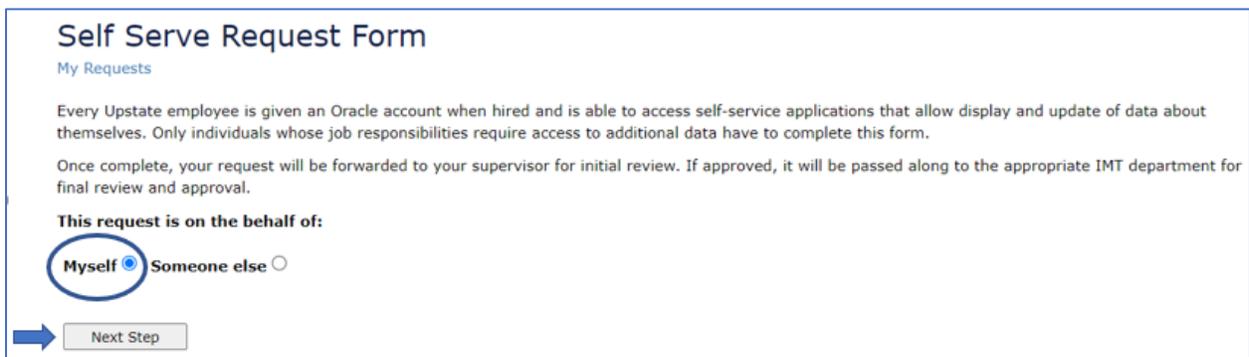
Next, select Self Serve as the topic for more information.



Next, select 'I need to request access to an application in Self Serve, How do I do this?' The click on the Self Serve Account Request Form.



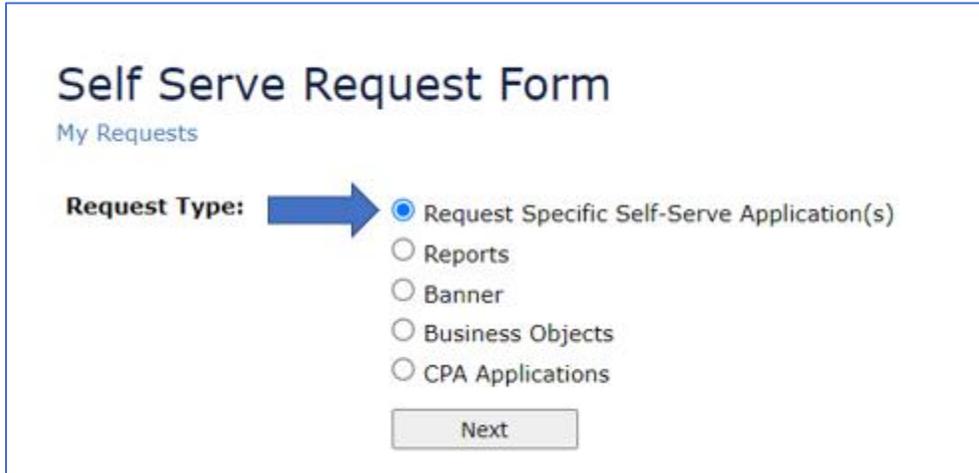
Choose "Myself" as the request option. And click Next Step.



Make sure all of your information is correct, and click Next.



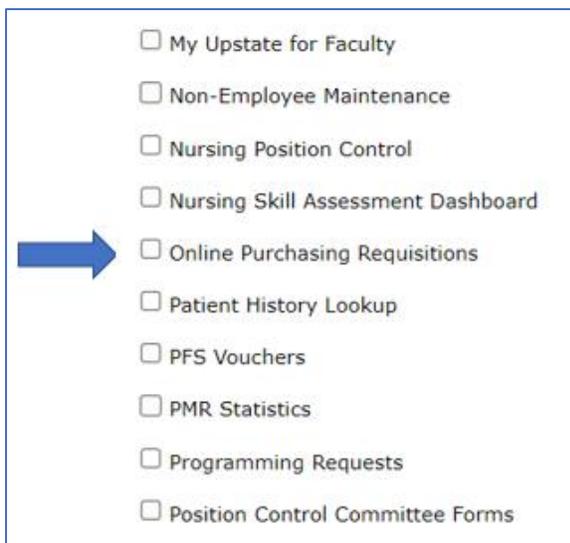
Choose “Request Specific Self Serve Application(s)”, and click Next.



Self Serve Request Form
My Requests

Request Type:  Request Specific Self-Serve Application(s)
 Reports
 Banner
 Business Objects
 CPA Applications

Check the box that says “Online Purchasing Requisitions”.



My Upstate for Faculty
 Non-Employee Maintenance
 Nursing Position Control
 Nursing Skill Assessment Dashboard
 Online Purchasing Requisitions
 Patient History Lookup
 PFS Vouchers
 PMR Statistics
 Programming Requests
 Position Control Committee Forms

When you click the “Online Purchasing Requisitions” checkbox, you will see detailed information on this application. You will then have the option of selecting “Insert Only” or “Insert and Submit” privileges.

For State Accounts, select from the drop-down. For Research Accounts, enter the project number(s) in the comment box.

Note: The Department Head has automatic privileges to update access via the Purchase Authorizations application. You do not have to fill out this form if you request access directly from the Department Head. If you continue to submit this form, we will need to obtain prior authorization from the Department Head prior to updating your access. This additional step will take place after your direct supervisor has approved your request.

Online Purchasing Requisitions

This application allows users to create and submit online purchase requisitions. For State Accounts, select from the list below. For Research Projects, enter the project numbers in the comments box below. For Research Projects, Project PI's (Grant Owners) have this access by default and do not need to request rights to the grants they own. Please note: the Department Head and Project PI have automatic rights to issues you these privileges via the Purchase Authorizations application on Self-Serve, without requiring the submittal of this form. If you fill out this form, we will need to obtain authorization from the Department Head or Research Project PI before updating your access.

Select Level of Access:

Select Account(s):

(User Ctrl Key for multiples)

1380 IHP EXAM RELOCATION AT TRACK (01611110)
1392 UH AND CH ADULT BEHAVIORAL HEALTH DOOR LIGATU (02611102)
151000 CAMPUS SECURITY UPGR (03940600)
151000 CAMPUS SECURITY UPGR (05261400)
151000 CAMPUS SECURITY UPGRS (03960800)
151000 UPGR CAMPUS SECURITY SYS (05324900)
151001 - UPGRADE ELEVATORS - CAMPUS ACTIVITY BUILD (05474200)
151001 - UPGRADE ELEVATORS - CAMPUS ACTIVITY BUILD (05474300)
151001 CAB ELEVATORS (05374800)
151002 UPGR SECURITY READER (03964500)

Once submitted, you will receive an email from IMT_Requests@upstate.edu that it has been received: *“Your Self Serve request has been received. Once approved by your supervisor (enter name here), it will be processed by IMT as soon as possible. You may review the status of your request at any time by visiting the following URL: (Specific URL will be provided).”*