# **Requisitions**

It will be important for you to have the following information prior to submitting the requisition into PS CFS:

- Grant chartfield information
- Make sure you have the correct account number that will be used for the purchase.
- RA will have to approve the purchase.
- Obtain a quote for the item(s) to be purchased, this will be attached to the requisition.
- Any requisition over \$10K will require purchase approval form to be completed and attached to requisition prior to submitting it for approval
  - o Purchase Approval Form Over 10K\_0.pdf (csusb.edu)
- When purchasing software, ICT Accessibility & Security approval will also have to be attached to requisition prior to submitting for approval.
  - o ICT Accessibility & Security Review Formstack

#### Log into myCoyote Home page



• Click on Administrative Systems > then CFS

			¢	myCoyote myCoyote Home		
	PeopleSoft	PeopleSoft CS PeopleSoft Campus Solutions	PeopleSoft HR	PeopleSoft HR PeopleSoft Human Resources		CS Worklist Access to PeopleSoft approval framework to process requests
(	CFS	Common Financial System The financial data management system for the CSU	CFSDW	Common Financial System Data Warehouse Run reports on finance information	CSU	CSYOU The CSU systemwide employee portal
		Event Management System EMS: Request a Room, Request Furniture/Equipment, Request a Display Case		Travel and Corporate Card Electronic travel requests, booking, expense reports and Corporate Card Reconciliation using Concur	*	WebTMA Facilities Management Work Request System

• CSYOU tab will open> click on CFS PRODUCTION LOGIN

<b>CS</b> YOU			Search this site
EMPLOYEE TOOLS & Resources services	DIVISION & PROJECTS & COLLABORATE ORGANIZATIONS INITIATIVES		DRMS & NEWS & ROCEDURES INFORMATION
HOME > TOOLS & SERVICES > F	INANCIAL TOOLS COMMON FINANCIAL SYSTEM (CFS)		
Common Financial System (CFS) CFS Non-Production Financial Information Systems (FIS)	Common Financial System	(CFS)	CFS PRODUCTION LOGIN
CFS Login	5 Year Maintenance Schedule		Systemwide Technical Support
Finance Data Warehouse Login Finance DW Home Page	CFS System Outages		Requests for assistance begin by contacting the ITSupport Center by <u>email</u> or by telephone (562) 951-8500.
Interagency Financial Transactions	Title Scheduled Outage: Unisys will be renewing the Custom Certificate for OEM Prod and OEM AWS Dev Environments - BLTN0002081	Distribution Date 5/14/2024 5:29 PM	Requests are routed to technology service providers 24 hours a day, 7 days a week, 365 days a year.
FS User Access Request Bank of CSU	Scheduled Outage: CFS Application Update - May 22, 2024 COMR - BLTN0002422	5/13/2024 9:14 AM	
Wdesk	View All		<u>Open a ticket using</u> ServiceNow
	CFS Application Development Do	cumentation	
	CES 0.2 Application Documentation (CMS Brog	ram Cita)	10.00

CFS 9.2 Application Documentation (CMS Program Site)

• This will take you to CSUSB login

CSUSB WE DEFINE THE Future
Sign in →
Forgot Password? Account Management Activate Account IT Support

- Once you are logged in you will see various icons to choose from. Click on purchasing.
- CFS Purchasing will open up. Click on Requisitions > Add/Update Requisitions
  - You can also access through navigation icon. Menu > Purchasing > Add/Update Requisitions



✓ CFS 9.2	CFS Purchasing
🏥 Process Monitor	Process List Server List
🕌 Report Manager	View Process Request For
💞 Query	User ID 63006509525 Q Type V Last V 1 Days V Refresh
Requisitions	Server Name Q Instance From Instance To Clear
Add/Update Requisitions	Run Status 🔍 Distribution Status 💙 🖾 Save On Refresh Report Manager Reset
Requisition Document Status	
Review Requisition Info	▶ No process / job matching the criteria
Review Purchase Order Info	Save Notify
Reports	Process List   Server List
Supplier Information	
TReq to Chk Notification	

• Save this to your Favorites for easier future access. On the upper right side click on the three dots > click on add to Favorites > Save it as "Add/Update Requisitions"

CFS Purchasing	ଜ ଦଡ
Requisitions	New Window
	Add to Homepage
Eind an Existing Value Add a New Value	Add to NavBar
*Business Unit SBCMP Q	Add to Favorites
*Requisition ID NEXT	My Preferences
	Help
Add	Sign Out

- Find an Existing Value | Add a New Value
  - The Business unit must be changed appropriately to the correct business unit. In this case for the grant we are using SBFDN for the business unit.

✓ CFS 9.2	CFS Purchasing
Requisitions	Look Up Business Unit ×
Eind an Existing Value Add a New Value	Help Business Unit begins with
	Description begins with 🗸
*Business Unit SBFDN Q *Requisition ID NEXT	Search Clear Cancel Basic Lookup
Add a New Value   iness Unit SBFDN Q uisition ID NEXT	Search Results
	View 100
Add	Business Unit Description
	SBASI Associated Students, Inc.
Find an Existing Value   Add a New Value	SBCMP CSU San Bernardino
	SBFDN University Enterprises Corp.
	SBPH2 CSUSB Philanthropic Foundation
	SBPHL CSUSB Philanthropic Foundation
	SBSUN CSUSB Student Union

• Once you have selected the correct business unit click on "add" this will take you to the page to enter the requisition information.

er l	
	Default comment added for Ship To Code RECG MAIN. Verify on Ship to comments page. (10100,142)
	The comment defaulted can be found in the Ship To Comments secondary page. To review the comments, select the Ship To Comments hyperlink found under the Schedule page.
m	ОК

• This pop up will appear, this is normal just click Ok.

quisition	quisitions																
	ı																
E	Business Unit	SBEDN					Status Open										
	Requisition ID					Budge	et Status Not Cl	nk'd 🛚	e.								
Rec	quisition Name	•			Copy From		Hold	From Further	Processing								
leader																	
	*Requester		Q		-												
*Rec	quisition Date	12/11/2023	:::	Requester Info													
	Origin	117	a	Biology													
*Cı	urrency Code	USD			Amount Sum	mary (?)											
Acc	ounting Date	12/11/2023	<b></b>	Dollar		tal Amount		0.00	USD								
		Requisition Defaults		Add Comments													
		Requisition Activities															
0		Purchasing Kit Item Search		Catalog Requester Item	IS											▶ 1	16-
0														4 4	1-1 of 1 🗸 🕨		
	Ship To/Due	Date Status	S	upplier Information	n Item Information	Attribute	s <u>C</u> ontract	Sourcing Co	ontrols III					• •	1-1 of 1 🗸	PI I	vie
Details	Ship <u>T</u> o/Due		S	upplier Information			s <u>C</u> ontract Quantity	Sourcing Co	Category	Price	Merchandise Amount⊽	Status		• •	1-1 of 1 🗸 🕨		Vie
Details			s Q								Amount⊽	Status Open	P		1-1 of 1 ▼ ▶	+	
∎ Q Details ■≜ 1 Printable V	lterr				on		Quantity	*UOM	Category		Amount 0.00						
Details 1 Printable V	Item				on		Quantity	*UOM	Category	. 0	Amount 0.00						.] [

• Click on requisition defaults, it will take you to the below screen.

Requisition I	Defaults												
	Business Unit	SBFDN		F	Requisition Date	12/11/2023							
	Requisition ID	NEXT			Status	Open							
Default Options	0												
○ Default		applied if no other de	tion, the default values of efault values are found his page are not used.										
Override		If you select this option only non-blank value	ion, all default values e es are assigned.	ntered on this page	override the defau	ilt values four	nd in the default	hierarchy,					
Line	r												
	Buyer		Q		Unit	of Measure		Q					
	Supplier		Q		Suppli	er Location		Q					
	Category		Q		Suppli	er Lookup							
Schedule													
	Ship To		Receiving Warehouse	9	*D	istribute By	Quantity	~					
	Due Date				°L	iquidate By	Quantity	~					
Ultim	ate Use Code	Q				Ship Via	BESTMETHO	C Q					
	Attention To				-		DA	Q					
Distribution					F	eight Terms							
	SpeedChart	Q											
Distributions													
III Q													
Details	Asset Informatio	on II►											
Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept		Program	Class	Bud Ref	Product	Project	,
1		SBFDN Q	٩		۹ (	۹	Q	٩	٩	٩	٩		٩

- You will always select "Override" as the default option.
- Now click on supplier lookup to look for the vendor.

Req Form					Add/Update Requisit	tions			
Supplier Search									
Search Criteria									
Name	fisher		Short Name						
Alternate Supp Name									
City			State	Q					
Country		Q	Postal						
Class		Q	Туре	Q					
Max Rows	1	0							
Search			4 • • • • • • • • • • • • • • • • • • •	H					
Search Results						I-1 of 1 🗸 🕨 🕨 I View All			
Sel Supplier ID	Location	Address	Short Supplier Name	Supplier Name		Withholding Applicable			
0000001874	MAIN	1	FISHER SCI-001	Fisher Scientific		Ν			
Supplier Detail Address	Refresh								

- Type in the vendor's name and click on search. It will show the search results, select the correct vendor from the search results and then select OK. Please note that if we have not purchased from this vendor before, they might not appear on the search results. If this is the case, you will need to add the vendor name and contact information in the header comments section. (see pg. 8)
- Once you select OK, it will take you back to the requisition defaults page. Now you can select the most appropriate unit of measure for the items you are purchasing. Ex: EA, SRVC, UNIT
- Select the most appropriate category of the items you are purchasing by clicking on the magnifying glass.
- Attention to: 'Your Name'
- You can now add the grant account chartfield information and click OK. This will now take you to the main requisition page.

Maintain R	Requisitions																			
Requisitio	on																			
	Business Unit	SBFDN					Status	Open												
	Requisition ID	NEXT				Budge	et Status	Not Chk'	d 🖷	đ										
R	equisition Name			c	opy From			Hold F	rom Further F	Processing										
▼ Header (	0																			
	*Requester		۹																	
*P.	equisition Date	12/11/2023		,	-															
			Requ	uester Info																
	Origin	117	Biolo	ogy																
*(	Currency Code	USD		Amount Summary ⑦																
A	ccounting Date	12/11/2023	Dolla	ar	Tot	al Amount			0.00	USD										
				_					0.00	000										
		Requisition Defaults Requisition Activitie		Comments																
Add Items F	From (1)																			
Add items r	FIOID	Purchasing Kit	Ca	talog																
		Item Search		quester Items																
Line ⑦																				
E Q																B	( 4	1-1 of 1 🗸 🕨	N I Vi	iew All
																		, , , , , , , , , , , , , , , , , , , ,		
Details	Ship To/Due	Date Status	Supplie	r Information	Item Information	Attributes	s <u>C</u> or	ntract	Sourcing Co	introls [])	•									
Line≜	Item			Description			Quantity		*UOM	Category		Price	Merchandise Amount⊽	Stat	us					
						_													_	_
1	<b>B</b>		Q		4 (A	驖	0.0000		<b>Q</b>		Q	0	0	.00 Ope	n	0	0	1	+	-
View Printable	e version								*Go toMo	JIE		~								
Save	Notify R	fresh																Add	Update/	/Display

- Your ID should be listed as the requester and your name to the right of it, shown here covered.
- The origin should be automatically prefilled to your department, if it does not please click on the magnifying glass and select your department.

- Quote must be attached to requisition in the header comments section. Header > Add Comments > Associated Documents > Attach
  - Please note that if any additional documents are needed for this requisition such as the \$10K + form or the ICT Accessibility & Security approval form, it must be attached along with the quote in one file.
  - If these required forms are not attached purchasing will send the requisition back to you to attach the documents and will need to be reapproved by the college analyst.

Aaintain Requisitions										
Requisition										
Business Unit	SBFDN						Open			
Requisition ID	NEXT				Budg	et Status	Not Chk'd	100		
Requisition Name	e		Co	ppy From			Hold From Fur	ther Proces	sina	
▼ Header ⑦										
*Requester	63006509525	Q Ales	aGuijarro, Dulci							
*Requisition Date	12/13/2023	<b></b>		- -						
Origin	117	Q Req	uester Info							
-		Biol	ogy							
*Currency Code	USD	Doll	ar	Amount Sum	mary 🕐					
Accounting Date	12/14/2023	<b></b>		To	otal Amount		0.0	o us	D	
Add Items From ⑦	Requisition Defaults Requisition Activities Purchasing Kit Item Search	Ca	Comments talog equester Items							
ine 🗇										
III Q										
Details Ship Io/Due	e Date <u>S</u> tatus	Supplie	er Information	Item Information	Attribute	s <u>C</u> on	tract Sourci	ng Controls	₽	
Line 1ten	n		Description			Quantity	*UOM	Cate	gory	Price
1 陆		Q		<b>a</b>	嘅	0.0000		۹	Q	
fiew Printable Version							*Go to	More		

- If the vendor has provided a price for the shipping/freight this should be added into the comments section and not listed as a line item.
- As rule of thumb you should always add "ATTN: YOUR NAME" in the comments section so it is clear who the package is for.

Business Unit SBFDN Requisition ID NEXT	Requisition Date 12/13/2023 Status Open	
Requisition ID NEXT	Status Open	
*Sort Method Comment Time Stamp	Sort Sequence Ascending	✓ Sort
Comments	Q.    4 4	1 of 1 v 🕨 🕨 I View Al
Jse Standard Comments	Comment Status Active	Inactivate
Vendor information (if needed)		
Shipping/Freight Cost (if provided by vendor in a	uote)	Ū,
ATTN: YOUR NAME		A
□ Send to Supplier □ Show □ Show at Voucher	t Receipt	
Associated Document		
Attachment	Attach View Delete	Email
From -> REQ SBEDN-NEXT		

• Once you have added all the necessary information and attached the quote you can now click OK and it will take you back to the main requisition page.

## Adding Line Items

	Business Un Requisition II					Status Open t Status Not Ch		7								
	Requisition Nan			Copy From	Dudger											
Header ⑦				oopy risin			d From Further F	Processing								
	*Requeste	r 63006509525 Q	AlcalaGuijarro.D													
*Rec	lequisition Date	e 12/13/2023	Requester Info	uice												
	Origin	n 117 Q														
*Cr	Currency Code		Biology	Amount Sum	many (2)											
	ccounting Date		Dollar		tal Amount		0.00	USD								
dd Items Fr	From ⑦	Purchasing Kit Item Search	Catalog Requester Iten	15												
Add Items Fro		Item Search	Requester Iten		Attributes	Contract	Sourcing Co	untrole III.					< ∢	1-3 of 3 🗸 🕨		iew Al
ne ? Q Details		Item Search		n Item Information	Attributes	Qontract	Sourcing Co	II)	Price	Merchandise Amount∛	Status		• •	1-3 of 3 🗸 🕨	) I V	iew All
ne 🤊	Ship <u>T</u> o/Du	Item Search	Requester Iten	n Item Information			-		Price 0	Amount	Status Open		( (	1-3 of 3 🗸 🕨	►   V	
ne ?	Ship Io/Du	Item Search Je Date Status S m	Requester Iten	n Item Information	6, (	Quantity	NOU	Category		Amount = 0.00						-
ne ⑦ □ □ Details ine≜ 1	Ship Io/Du	Item Search ue Date Status S m	Requester Iten upplier Informatio Descriptic	n Item Information		Quantity 0.0000	-UOM	Category Q	0	Amount = 0.00	Open	0	Ţ	1	+	

- Under the Line section you will now start entering the items you wish to purchase. No need to enter anything for the item space. In the description section here you can add all the detail for each item (enter one item per line), it would be helpful to enter the item or catalog number and short description listed on the quote. You can copy and paste the in formation listed by the vendor.
- Enter the quantity > the unit of measure and category should now populate from what you selected in the requisition defaults, if it does not then you can select it by clicking on the magnifying glass > enter the price.
- To add more lines for additional items you can click on the add button and a pop up will appear asking you to enter the number of rows you wish to add, ex: if you will be purchasing 5 items you should add 4 additional lines.



• Please remember that you should not include the taxes or shipping as a line item, if the vendor provides these in the quote please only add these in the header comments section as explained above.

Requisitio	on														
	Business Ur	it oprov				Status Open	2								
	Requisition					t Status Not C		17 <u>7</u>							
R	equisition Na			Copy From				-							
Header						⊔Ho	ld From Further	Processing							
Ticador	*Request	ar (111111111111111111111111111111111111	Q												
^R	equisition Dat		Requester li	nfo											
	Origi	in 117	Q Biology												
	Currency Cod	le USD		Amount Sumr	mary ⑦										
۵	ccounting Dat	te 12/11/2023	Dollar		tal Amount		0.00	USD							
	ocounting bu				anyanouni		0.00	030							
		Requisition Defaults Requisition Activities	Add Comme	nts											
Add Items	From ⑦														
		Purchasing Kit	Catalog												
		Item Search	Requester	Items											
Line ⑦															
E Q													H	1-1 of 1 🗸 🕨	
Details	Ship To/D	ue Date <u>S</u> tatus	Supplier Inform	ation Item Information	Attributes	Contract	Sourcing C	ontrols II»							
Line≜	lt	em	Descr	iption		Quantity	*UOM	Category	Price	Merchandise Amount⊽	Status				
1			٩	¢,	۵. (	0.0000	٩	٩	0	0.00	Open	0		1	
							"Go to	lara		~					
View Printable	e Version						"Go to"	101C							

- Once you have added all the information for the items you are purchasing > click on 'Save' this will save all the entered requisition information entered > click on 'View Printable Version' there might be a pop up indicating you do not have access to print ignore the message it will still print. You can access the copy of the requisition by going to Report Manager (explained below).
- Once saved the requisition and requested the printable version, you can now click on 'Notify' to send the requisition to the college analyst for approval.

# Adding Vendor Information to Header Comments

- If you were not able to locate the vendor listed in the supplier search results you can add the vendors information to the header comments for purchasing to use and contact the vendor. Please make sure to include the vendor's name, phone number, address, and direct contact information if you have any.
- In the Header section of the requisition click on 'Add Comments'

Requisition												
Busines	s Unit S	BFDN					Status	Open				
Requisiti	ion ID N	EXT				Budg	et Status	Not Chk'd	ι. Έ	2		
Requisition	Name			Co	opy From			Hold Fr	om Further F	Processing		
Header ?	_											
^Requ	ester 63	006509525	Q Alci	alaGuijarro,Dulco	2							
*Requisition	Date 12	/13/2023	Π.	uester Info								
c	Drigin 11	7	Q	logy								
*Currency	Code US	SD			Amount Sum	mary 🕐						
Accounting	Date 12	/14/2023	Dol	lar	То	tal Amoun	t		0.00	USD		
Add Items From ⑦	Re	quisition Defaults quisition Activities Purchasing Kit	Ci	l Comments atalog								
ine ⑦ ■ Q		tem Search		equester Items								
Details Ship ]	[o/Due Dat	te <u>S</u> tatus	Suppli	er Information	Item Information	Attribute	es <u>C</u> o	ontract	Sourcing Co	ntrols   >		
_ine≜	Item			Description			Quantity		*UOM	Category		Price
1 🖿			Q		Ф (A	R,	0.0000		Q		۹	

• It will be important to add all the vendor information you have in the header comments section so that purchasing can use this information to contact the vendor and create a supplier profile for them.

#### **Header Comments**

Business Unit Requisition ID	SBFDN NEXT	Requisition	n Date Status			
*Sort Method	Comment Time Stamp	▼ *Sort Seq	uence	Ascending	•	Sort
Comments			(	۹ ا	1 of 1 🗸 🕨	View All
Use Standard Comm	ents	Comment St	atus /	Active	Inactivate	+
Vendor information (if Shipping/Freight Cost ATTN: YOUR NAME	needed) (if provided by vendor in quote)					
□ Send to Supplier □ Show at Voucher						
Associated Docur	nent					
Attachment		Attach \	liew	Delete	🗆 Email	
From -> REQ SBFD	N-NEXT					
OK Car	ncel Refresh					

## Checking the status of Requisitions

- Click on the navigation icon at the top right corner of the page > menu > purchasing > requisitions > review requisition information > requisitions.
  - Add this to your favorites for future use.

Requisition I	nquiry				
Business Unit Requisition ID Requisition	SBFDN Q	٩	To Req		٩
Requisition Name Req Status	٩		Origin	٩	
Requester Requester			a a		
Name Requisition Date		Supplier Lookup	То		
Supplier SetID Supplier ID	SBFDN	Supplier Details	Supplier		Q
Item SetID	SBCMP		Name Item ID		Q
Description	254 characters remain	ning	Direct	Ship	
Department	٩				
ок	Cancel				

- Change the Business Unit to SBFDN > type your last name in the requestor name section, your name should appear click on it > OK
- You will now see all the requisitions you have submitted. You can see the status on the requisition status column, if the analyst has already approved the requisition, it will show as approved.

# Printing Requisitions

- If you clicked on 'View Printable Version' you can access the copy of the requisition through report manager.
  - Navigation icon > reporting tools > report manager > click on the administration tab.
    - Add this to your favorites for future use.
  - The link to the requisition should appear in the report list. Click on the blue 'Requisition Print SQR' and it will open the PDF copy of the requisition.
- If you did not click on the view printable version you can follow these steps:
  - Menu > purchasing > requisition > reports > print requisition
    - Add this to your favorites as well.
  - Click on Add a new value enter 'Print\_Req' for the run control ID and click on add.

Print Requisition						
Run Control ID Language	Print_Req English ✓	Report M	anager	Process Monitor	Run Language	
Report Request Par	ameters					
Business	s Unit SBFDN	Q	Status	es to include		
Requisiti	on ID	Q		pproved anceled	Sele	ct All
From	Date			ompleted pen ending		
Requ	lester	Q	NO	T On Hold		~
Save Notify					Add	Update/Display

- Select SBFDN for the Business Unit > 'Select All' for the statuses to include > Save
- Now that you have saved these parameters you can enter the requisition number > click on Run
   > OK > now click on report manager > click on the administration tab. If the requisition is not there, wait a couple of minutes and click on the refresh button.
- After a few minutes the link to the requisition should appear in the report list. Click on the blue 'Requisition Print SQR' and it will open the PDF copy of the requisition.