

Requisitions

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

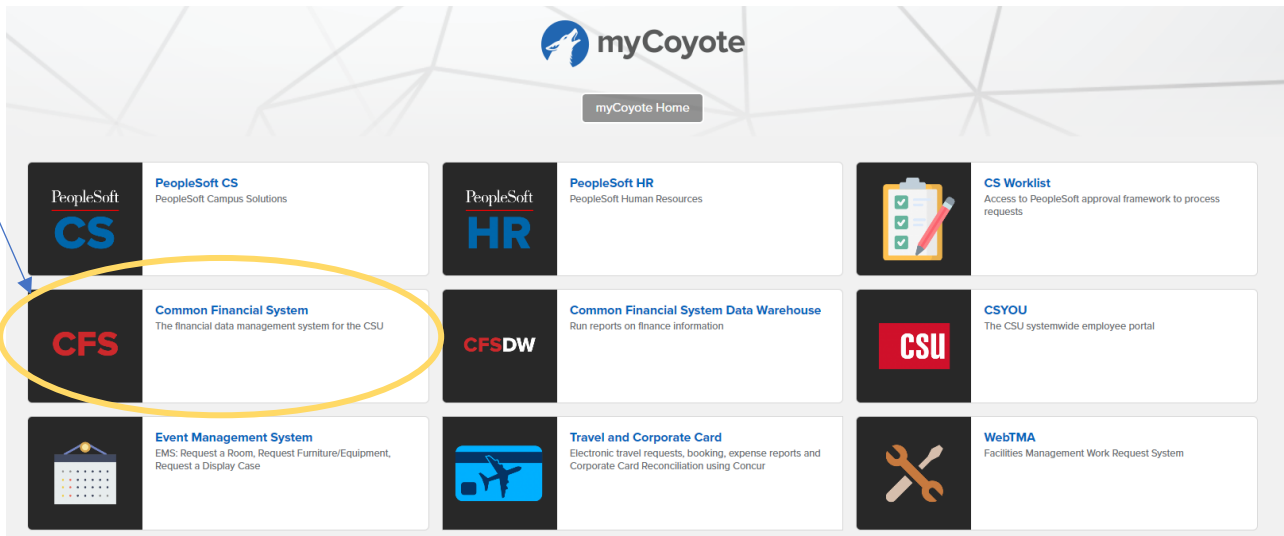
- Grant chartfield information
 - Make sure you have the correct account number that will be used for the purchase.
- RA will have to approve the purchase, prior to submitting requisition to ensure its an allowable purchase under the grant.
- Obtain a quote for the item(s) to be purchased, this will be attached to the requisition.
- Any requisition over \$10K will require a sole source form to be completed
 - [UECSoleSourceJustification-updated81220.docx](#)
- When purchasing software, ICT Accessibility & Security approval will also have to be attached to requisition prior to submitting for approval.
 - [ICT Procurement Process](#) | [Accessible Technology Services](#) | [CSUSB](#)

Log into myCoyote Home page

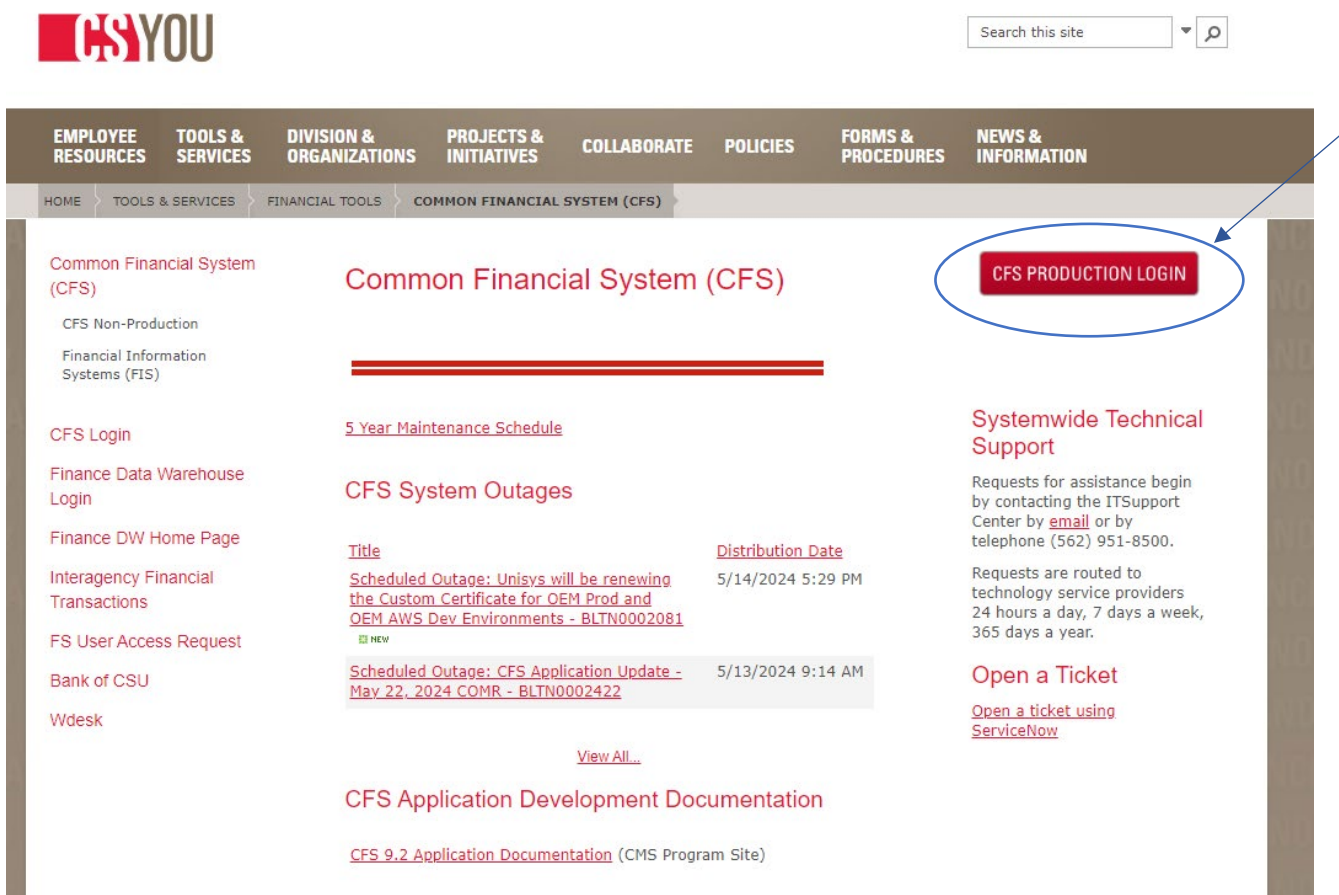
The screenshot shows the myCoyote home page dashboard. The header includes the myCoyote logo. The main content area is a grid of 15 tiles:

- Coyote Connection**: Check out the Coyote Connection events happening all year long, featuring the brand-new Coyote Hour.
- Winter Intersession 2024**: Winter Intersession 2024 is here! The class schedule will be available September 29, 2023 and registration begins November 13, 2023.
- Faculty and Staff Email**: Office 365 includes a suite of tools, such as Email, Calendar, OneDrive, and more.
- Canvas**: Canvas Learning Management System.
- Coyote OneCard Portal**: Access your OneCard Portal to view your digital OneCard, upload a photo online, manage campus funds, view your balances and more.
- Personal Messages**: Directly access your personal messages.
- Academic Intervention Response (AIR)**: Submit academic concerns for support intervention and progress monitoring.
- My Financials**: Make a Payment, My Financial Activity, OneCard Balance and CSUSB Scholarship Site.
- My Academics**: Student Center, Faculty Center, Advisor Center, Navigate, and related student, faculty, and staff services.
- Collaborate**: Zoom Video Conferencing, Google Drive, Qualtrics Surveys, Yammer and more.
- Administrative Systems**: PeopleSoft CS, PeopleSoft HR, CSYOU, CFS, CFS DW, EMS, and more. (This tile is highlighted with a yellow circle).
- My Employment**: Time & Attendance, Benefits, Paycheck, Travel, CSULearn, LinkedIn Learning, Interfolio, and more.
- Library Resources**: Find books, articles, media, textbooks, reserve study rooms, and more.

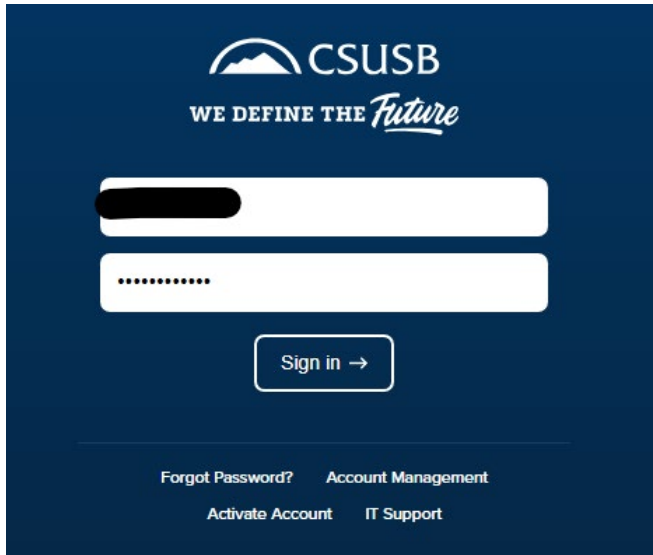
- Click on Administrative Systems > then CFS



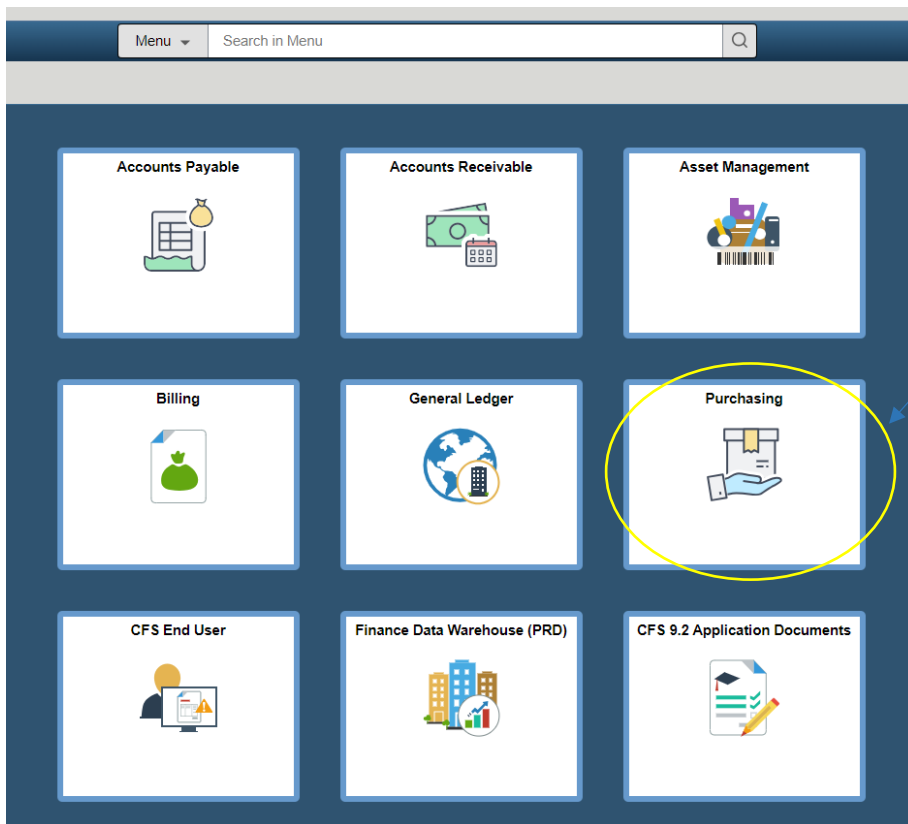
- CFSYOU tab will open > click on CFS PRODUCTION LOGIN



- This will take you to CSUSB login



- 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



- 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”

- Under the Add a New Value tab you will need to update the Business unit 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

Find an Existing Value Add a New Value

*Business Unit

*Requisition ID

Find an Existing Value | Add a New Value

Look Up Business Unit x

Help

Business Unit begins with

Description begins with

Basic Lookup

Search Results

View 100 1-6 of 6

| Business Unit | Description |
|---------------|--------------------------------|
| SBASI | Associated Students, Inc. |
| 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.

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.

- The pop up shown in the screen shot above will appear after clicking on the add button, this is normal just click Ok.

Requisition

Business Unit SBFDN Status Open
 Requisition ID NEXT Budget Status Not Chk'd
 Requisition Name Copy From Hold From Further Processing

▼ Header ⓘ

*Requester
 *Requisition Date 12/11/2023 Requester Info
 Origin 117 Biology
 *Currency Code USD Dollar Amount Summary ⓘ
 Accounting Date 12/11/2023 Total Amount 0.00 USD

[Requisition Defaults](#) [Add Comments](#)
[Requisition Activities](#)

Add Items From ⓘ

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line ⓘ

View Printable Version *Go to ...More...

| Line | Item | Description | Quantity | UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------------------|----------|----------------------|----------------------|-------|--------------------|--------|
| 1 | <input type="text"/> | <input type="text"/> | 0.0000 | <input type="text"/> | <input type="text"/> | 0 | 0.00 | Open |

Save Notify Refresh

Add Update/Display

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

Requisition Defaults

Business Unit SBFDN Requisition Date 12/11/2023
 Requisition ID NEXT Status Open

Default Options ⓘ

Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer **Unit of Measure**
 Supplier **Supplier Location**
 [Supplier Lookup](#)
Category

Schedule

Ship To RECG MAIN Receiving Warehouse *Distribute By Quantity
 Due Date *Liquidate By Quantity
 Ultimate Use Code Ship Via BESTMETHOE
Attention To Freight Terms DA

Distribution

SpeedChart

Distributions

Dist Percent GL Unit **Account** Oper Unit **Fund** **Dept** Program Class Bud Ref Product **Project**

| | | | | | | | | | | | | |
|---|----------------------|----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| 1 | <input type="text"/> | SBFDN <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|---|----------------------|----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

- Always select "Override" as the default option.
- Now click on supplier lookup to look for the vendor you will be purchasing from.

Supplier Search

Search Criteria

Name Short Name

Alternate Supp Name

City State

Country Postal

Class Type

Max Rows

1 to 1 of 1

Search Results

| Sel | Supplier ID | Location | Address | Short Supplier Name | Supplier Name | Withholding Applicable |
|--------------------------|-------------|----------|---------|---------------------|-------------------|------------------------|
| <input type="checkbox"/> | 000001874 | MAIN | 1 | FISHER SCI-001 | Fisher Scientific | N |

Supplier Detail Address

- 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 back to the main requisition page.

Maintain Requisitions

Requisition

Business Unit: SBFDN Status: Open

Requisition ID: NEXT Budget Status: Not Chk'd

Requisition Name: Copy From Hold From Further Processing

Header

*Requester: Requester Info

*Requisition Date: 12/11/2023

Origin: 117 Biology

*Currency Code: USD Amount Summary

Accounting Date: 12/11/2023 Dollar Total Amount: 0.00 USD

Requisition Defaults Requisition Activities Add Comments

Add Items From

Purchasing Kit Item Search Catalog Requirer Items

Line

| Line# | Item | Description | Quantity | *UOM | Category | Price | Merchandise Amount* | Status |
|-------|----------------------|----------------------|----------|----------------------|----------------------|-------|---------------------|--------|
| 1 | <input type="text"/> | <input type="text"/> | 0.0000 | <input type="text"/> | <input type="text"/> | 0.00 | 0.00 | Open |

View Printable Version

*Go to ...More...

- Your ID should be listed as the requester and your name to the right of it.
- The origin should be automatically prefilled to your department, if it does not prefill 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. You cannot attach multiple files, so you will need to combine them ahead of time.
 - If the 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.

Maintain Requisitions
Requisition

Business Unit: SBFDN Status: Open
Requisition ID: NEXT Budget Status: Not Chkd
Requisition Name: [] Copy From Hold From Further Processing

Header

*Requester: 63006509525 AlcaláQuijarro, Dulce
*Requisition Date: 12/13/2023 Requester Info
Origin: 117 Biology
*Currency Code: USD Dollar Amount Summary
Accounting Date: 12/14/2023 Total Amount: 0.00 USD

Requestion Defaults Add Comments
Requestion Activities

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

| Line | Item | Description | Quantity | UOM | Category | Price |
|------|------|-------------|----------|-----|----------|-------|
| 1 | [] | [] | 0.0000 | [] | [] | 0 |

View 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 when it is received.

Header Comments

Business Unit: SBFDN Requisition Date: 12/13/2023
Requisition ID: NEXT Status: Open

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments 1 of 1 View All

Use Standard Comments Comment Status: Active Inactivate

Vendor information (if needed)
Shipping/Freight Cost (if provided by vendor in quote)
ATTN: YOUR NAME

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ SBFDN-NEXT

OK Cancel Refresh

- 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 Unit: SBFDN
 Requisition ID: NEXT
 Requisition Name: [] Copy From
 Status: Open
 Budget Status: Not Chkd
 [] Hold From Further Processing

Header
 *Requester: 63006509525 AlcalaGujarro,Dulce
 *Requisition Date: 12/13/2023
 Origin: 117 Biology
 *Currency Code: USD Dollar
 Accounting Date: 12/14/2023
 Amount Summary: Total Amount 0.00 USD

Line
 Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | View All

| Line# | Item | Description | Quantity | UOM | Category | Price | Merchandise Amount | Status |
|-------|------|-------------|----------|-----|----------|-------|--------------------|--------|
| 1 | [] | [] | 0.0000 | [] | [] | 0 | 0.00 | Open |
| 2 | [] | [] | 0.0000 | [] | [] | 0 | 0.00 | Open |
| 3 | [] | [] | 0.0000 | [] | [] | 0 | 0.00 | Open |

Buttons: Save, Notify, Refresh, Add, Update/Display

- 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 you can add all the details 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 information listed by the vendor.
- Enter the quantity> the unit of measure and category should auto 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 4 items, you would add 3 additional lines.

cfs.calstate.edu says
 Enter number of rows to add:
 1
 OK Cancel

- 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.
- However, if there are any additional fees aside from the tax and shipping/handling you will have to add these as a line item since the purchasing department does not have the option to add that to the PO when they create it they can only add the tax and shipping/handling fees.

Maintain Requisitions
Requisition

Business Unit SBFDN Status Open
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name [] Copy From Hold From Further Processing

▼ Header

*Requester [] []
*Requisition Date 12/11/2023 Requisition Info
Origin 117 Biology
*Currency Code USD Dollar Amount Summary
Accounting Date 12/11/2023 Total Amount 0.00 USD

Requisition Defaults Add Comments
Requisition Activities

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

| Line | Item | Description | Quantity | *UOM | Category | Price | Merchandise Amount | Status |
|------|------|-------------|----------|------|----------|-------|--------------------|--------|
| 1 | [] | [] | 0.0000 | [] | [] | [] | 0.00 | Open |

View Printable Version
Save Notify Refresh Add Update/Display

- 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'

Maintain Requisitions
Requisition

Business Unit SBFDN Status Open
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name [] Copy From Hold From Further Processing

▼ Header

*Requester 63006509525 AlcalaGujjarro,Dulce
*Requisition Date 12/13/2023 Requisition Info
Origin 117 Biology
*Currency Code USD Dollar Amount Summary
Accounting Date 12/14/2023 Total Amount 0.00 USD

Requisition Defaults Add Comments
Requisition Activities

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

| Line | Item | Description | Quantity | *UOM | Category | Price |
|------|------|-------------|----------|------|----------|-------|
| 1 | [] | [] | 0.0000 | [] | [] | [] |

View Printable Version
Save Notify Refresh Add Update/Display

- 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.

- Please ensure that you provide the vendor name, address, and contact information (including phone number, email address, website, and fax number if applicable)

Header Comments

| | | | |
|----------------|-------|------------------|------------|
| Business Unit | SBFDN | Requisition Date | 12/13/2023 |
| Requisition ID | NEXT | Status | Open |

*Sort Method *Sort Sequence

Comments | 1 of 1 | View All

Use Standard Comments Comment Status Active

Vendor information (if needed)

Shipping/Freight Cost (if provided by vendor in quote)

ATTN: YOUR NAME

Send to Supplier Show at Receipt

Show at Voucher

Associated Document

Email

From -> REQ SBFDN-NEXT

Checking the status of Requisitions

- To check the status of a requisition you previously submitted; 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 Inquiry

Business Unit

Requisition ID To Req

Requisition Name

Req Status Origin

Requester

Requester Name

Requisition Date To

Supplier SetID [Supplier Lookup](#)

Supplier ID [Supplier Details](#)

Item SetID Supplier Name

Item Description Supplier Item ID

254 characters remaining Direct Ship

Department

- 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 Report Manager Process Monitor

Language Ⓞ Specified Language Ⓞ Recipient's Language

Report Request Parameters

Business Unit

Requisition ID

From Date

Through Date

Requester

Statuses to Include

Approved

Canceled

Completed

Open

Pending

- 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.