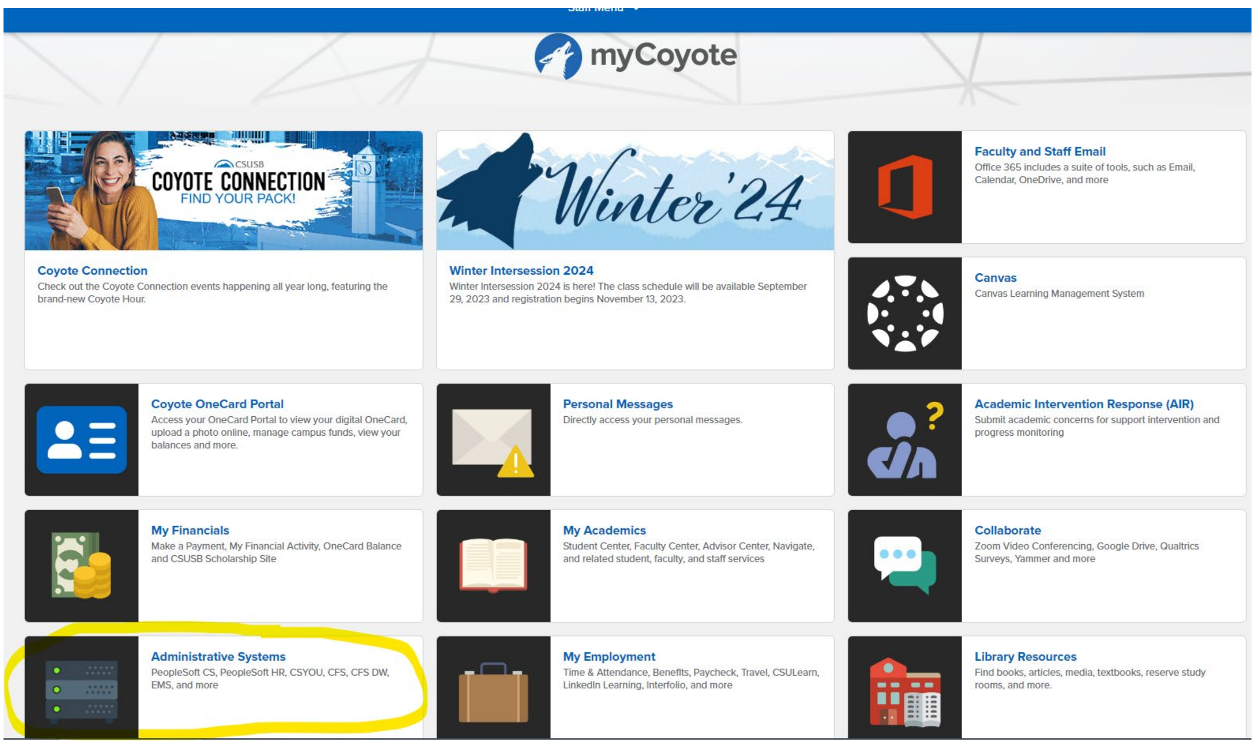
Requisitions

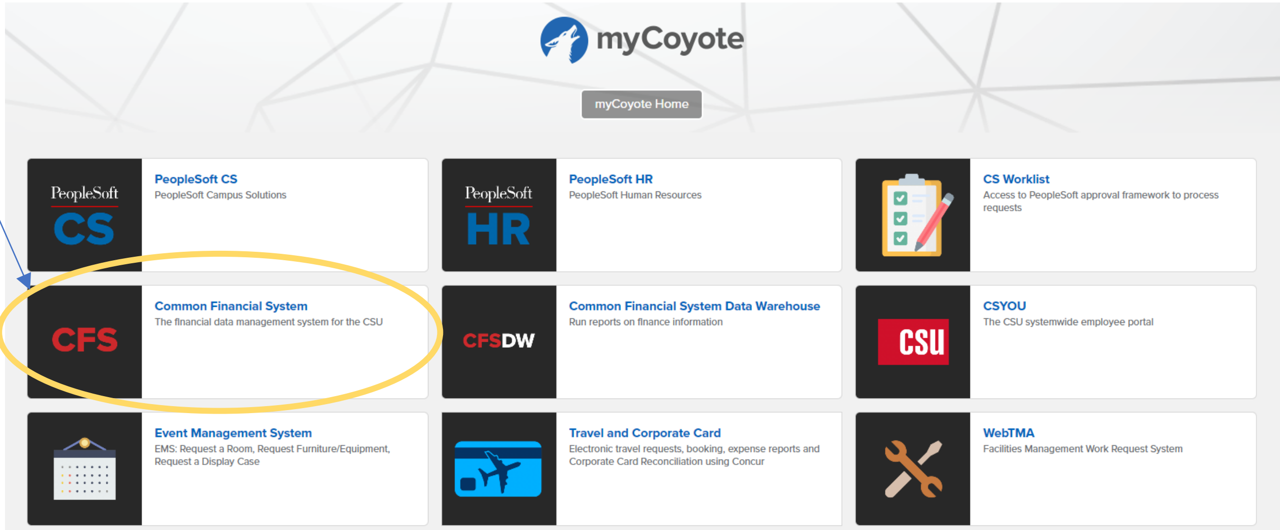
It will be important for you to have the following information prior to submitting the requisition into PS CFS:

- 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

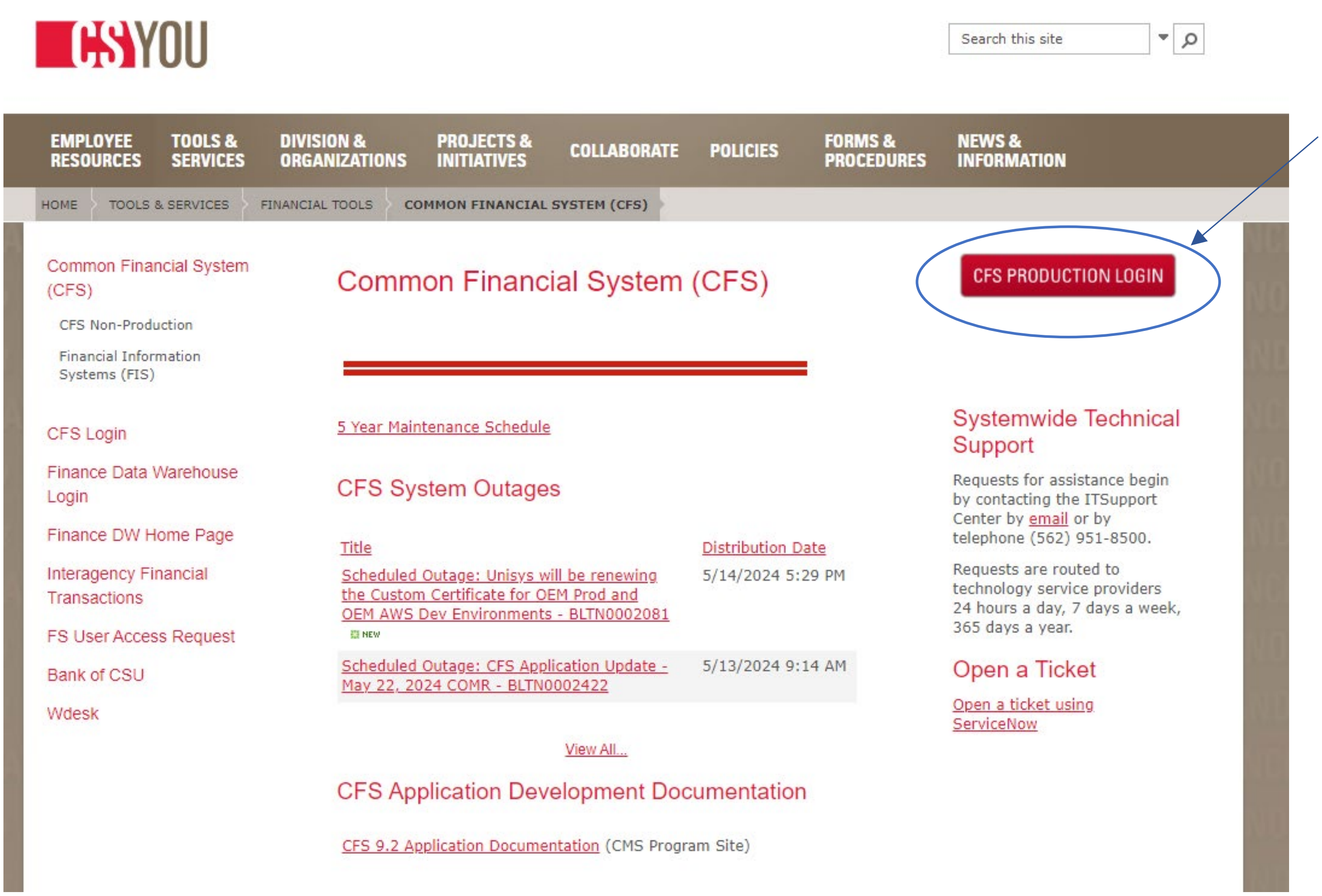
Log into myCoyote Home page



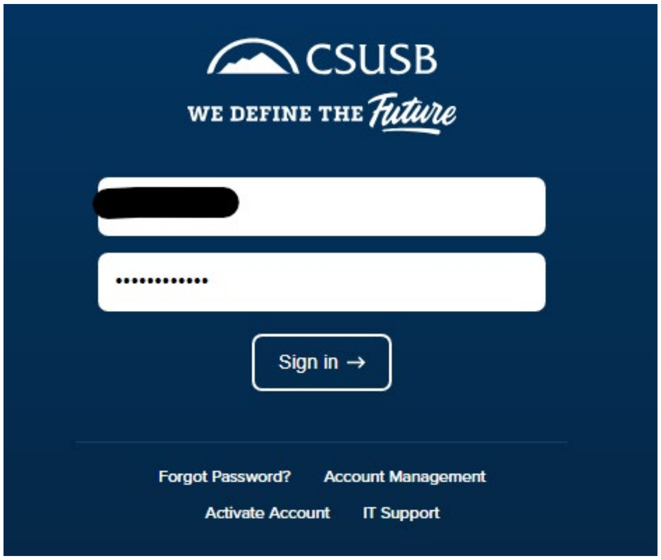
- Click on Administrative Systems > then CFS



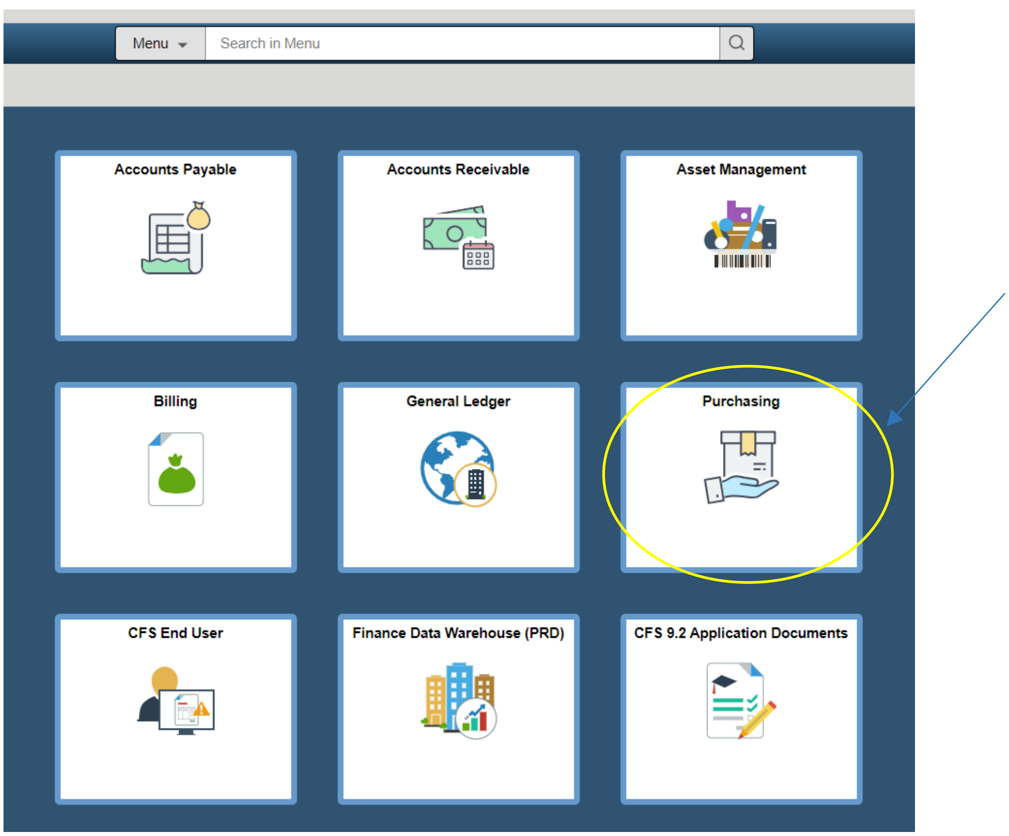
- CSYOU tab will open> click on CFS PRODUCTION LOGIN

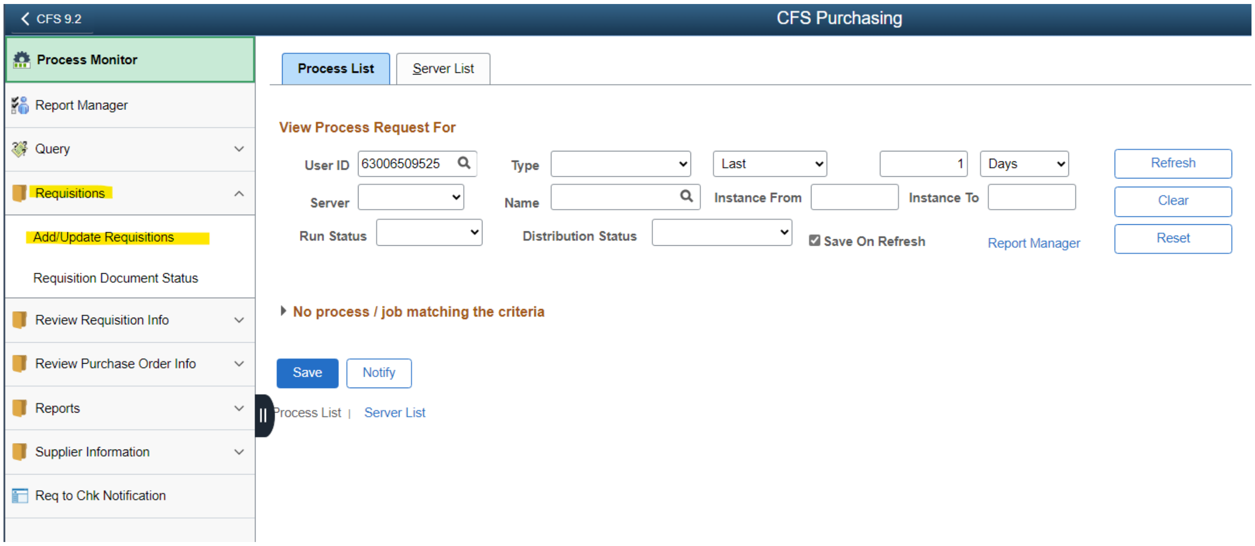


- This will take you to CSUSB login

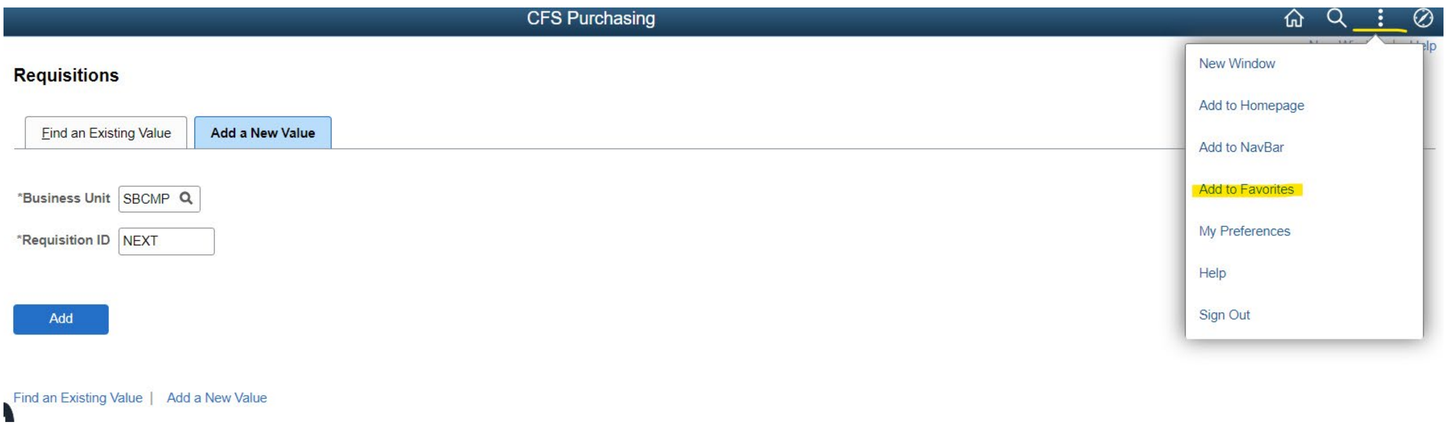


- Once you are logged in you will see various icons to choose from. Click on purchasing.
- CFS Purchasing will open up. Click on Requisitions > Add/Update Requisitions
    - You can also access through navigation icon. Menu > Purchasing > Add/Update Requisitions

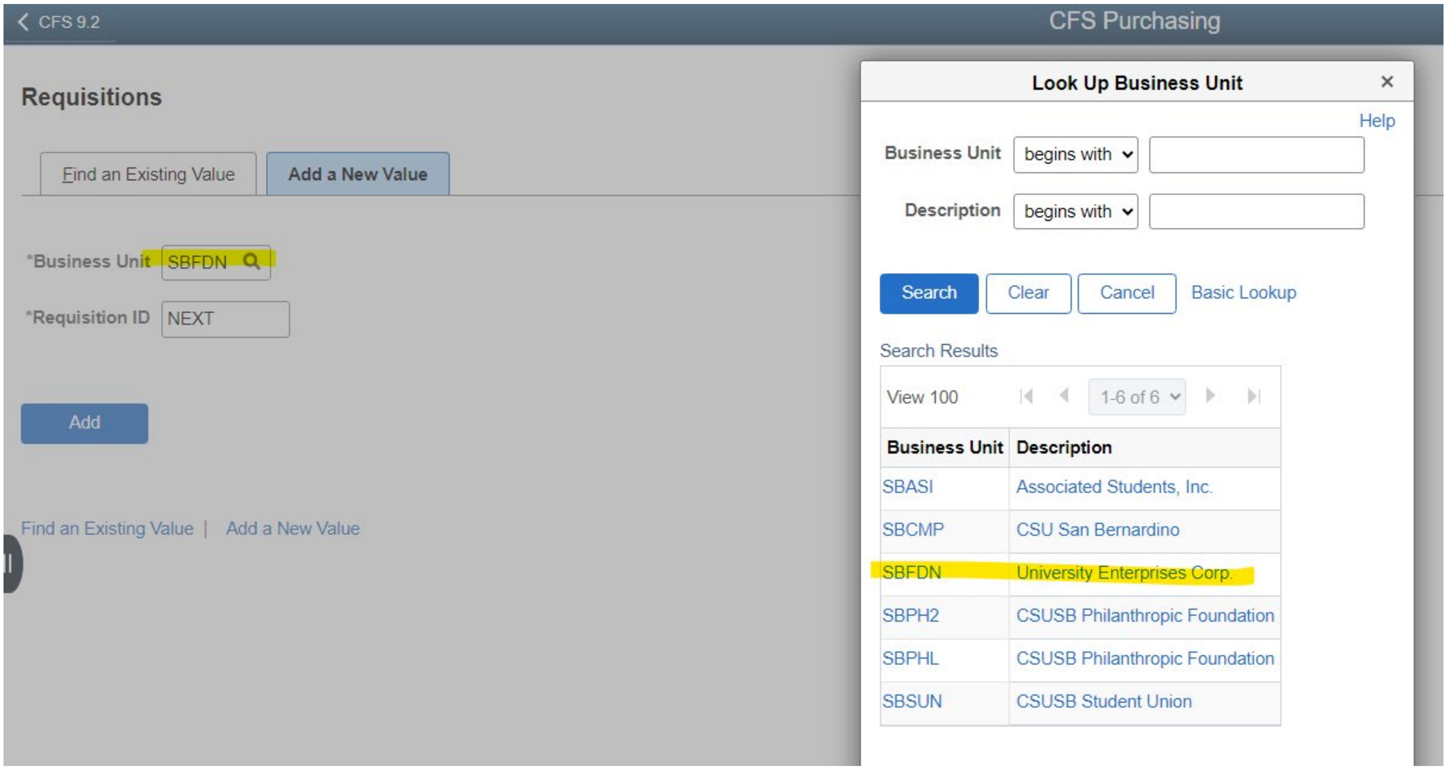




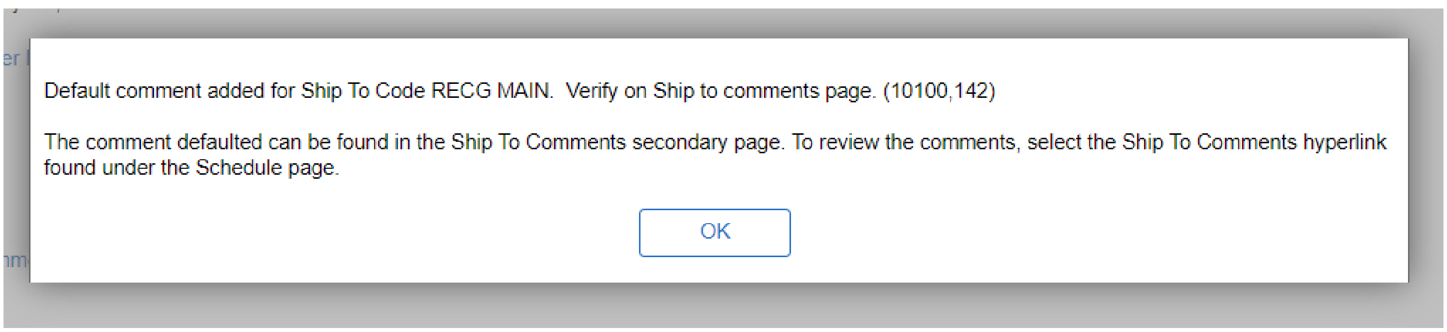
- Save this to your Favorites for easier future access. On the upper right side click on the three dots > click on add to Favorites > Save it as "Add/Update Requisitions"



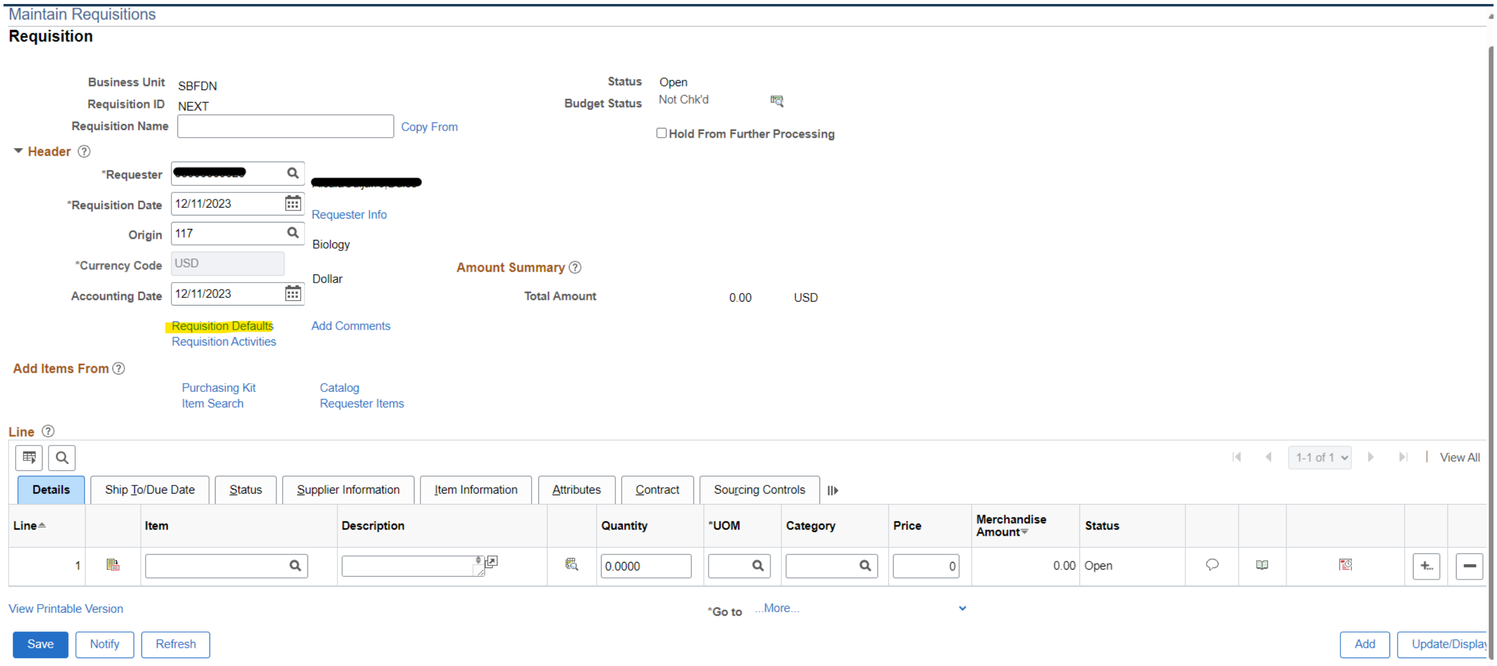
- Under the Add a New Value tab you will need to update the Business unit appropriately to the correct business unit. In this case for the grant we are using SBFDN for the business unit.



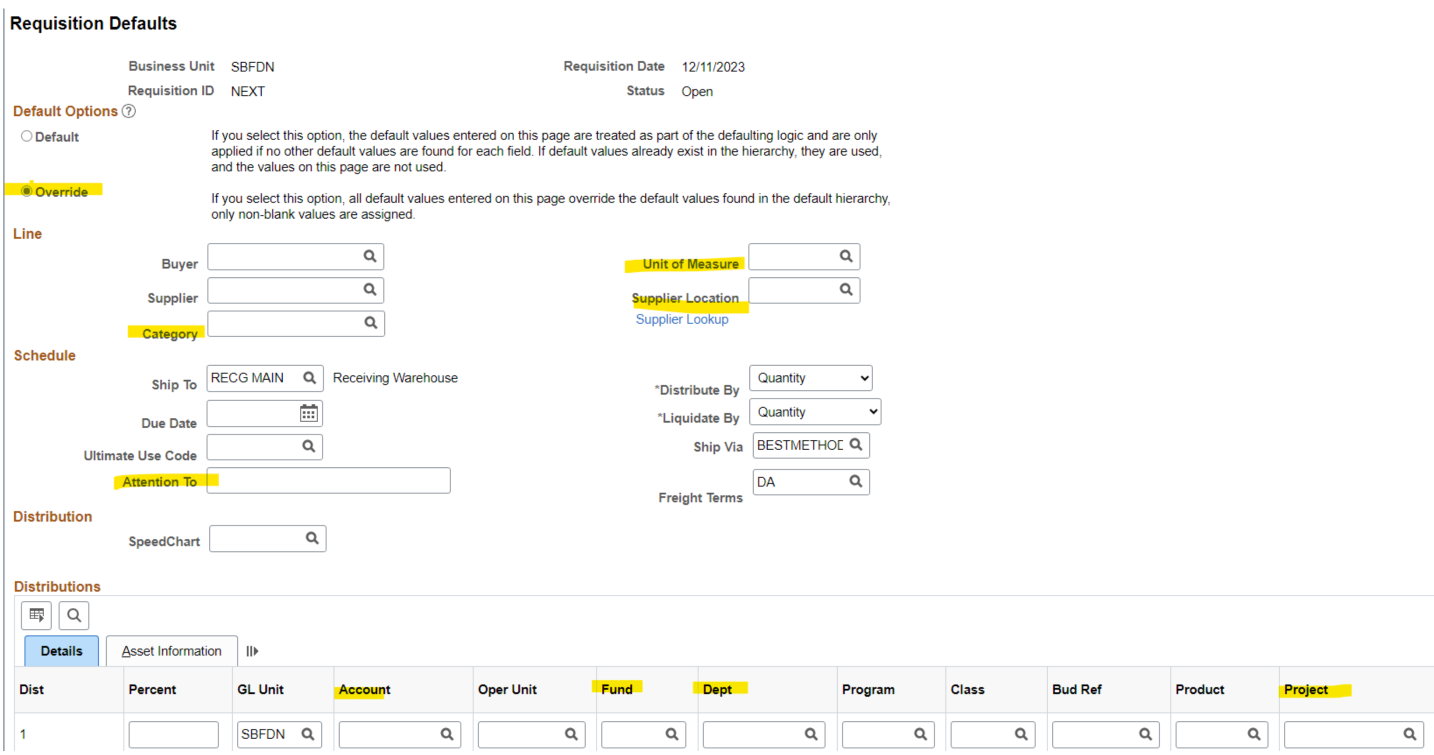
- Once you have selected the correct business unit click on “Add” this will take you to the page to enter the requisition information.



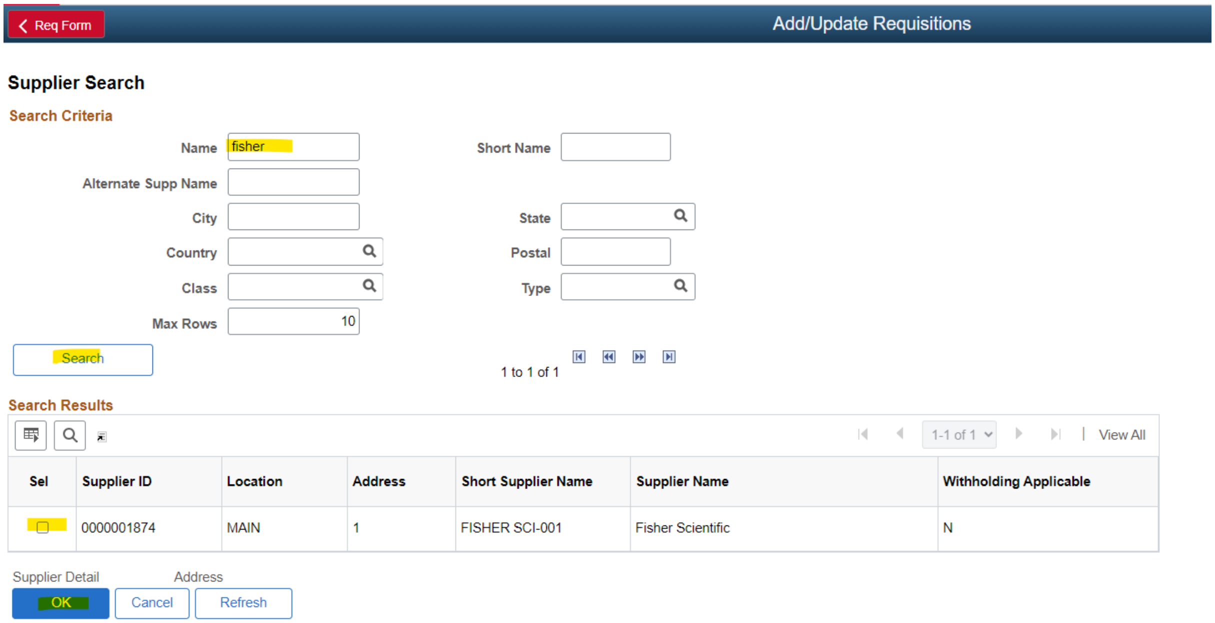
- The pop up shown in the screen shot above will appear after clicking on the add button, this is normal just click Ok.



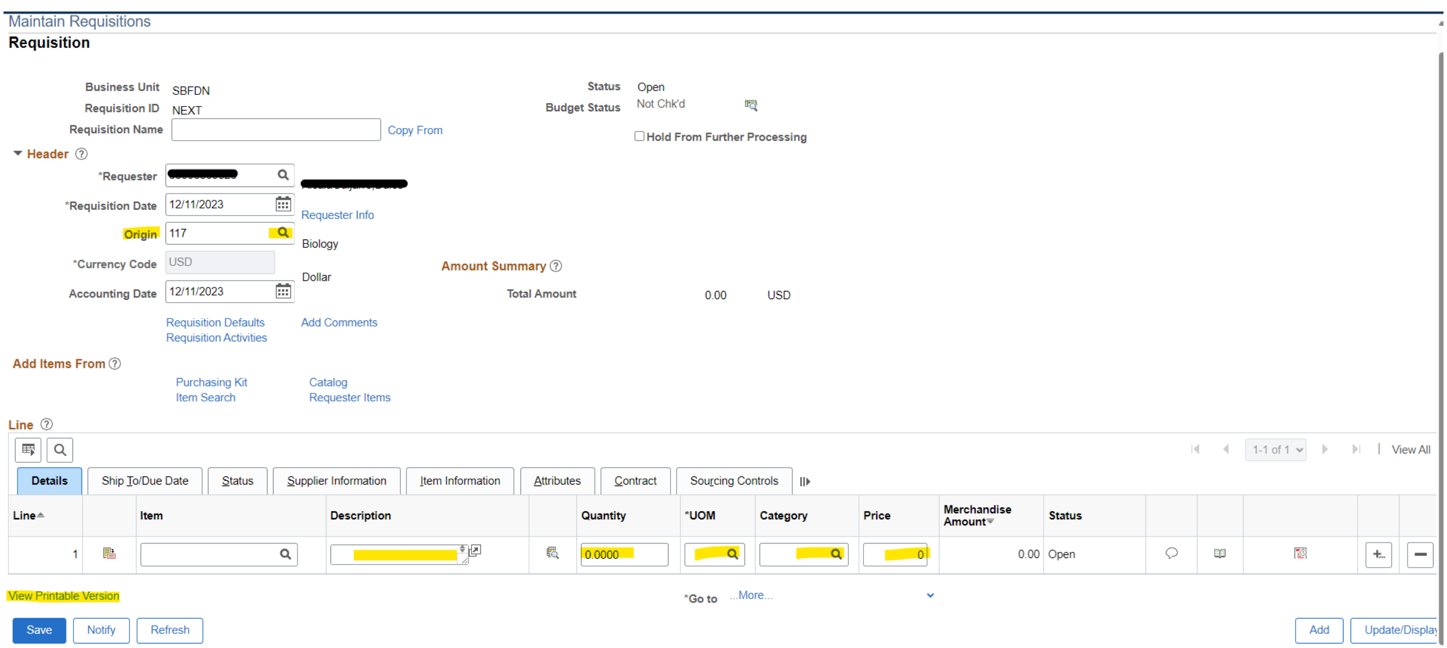
- Click on requisition defaults, it will take you to the below screen.



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

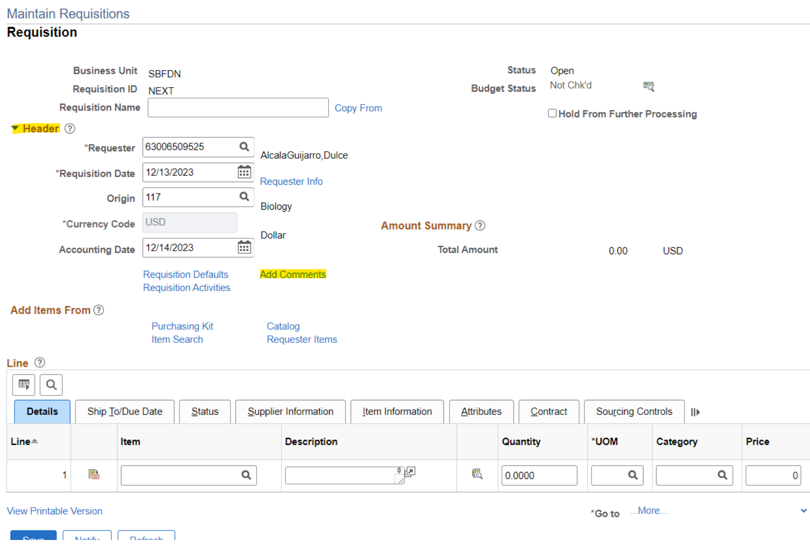


- Type in the vendor's name and click on search. It will show the search results, select the correct vendor from the search results and then select OK. Please note that if we have not purchased from this vendor before, they might not appear on the search results. If this is the case, you will need to 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.

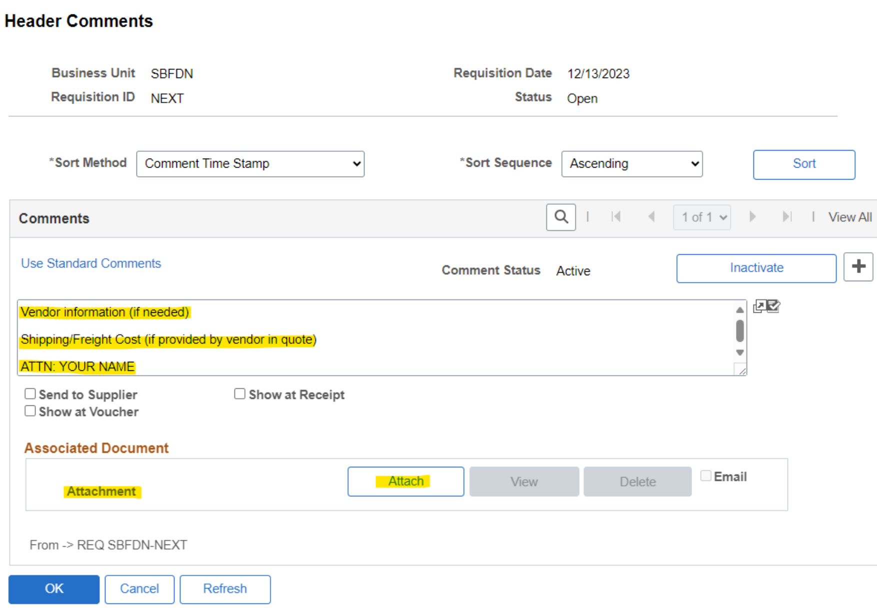


- Your ID should be listed as the requester and your name to the right of it.
- The origin should be automatically prefilled to your department, if it does not prefill please click on the magnifying glass and select your department.

- 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.

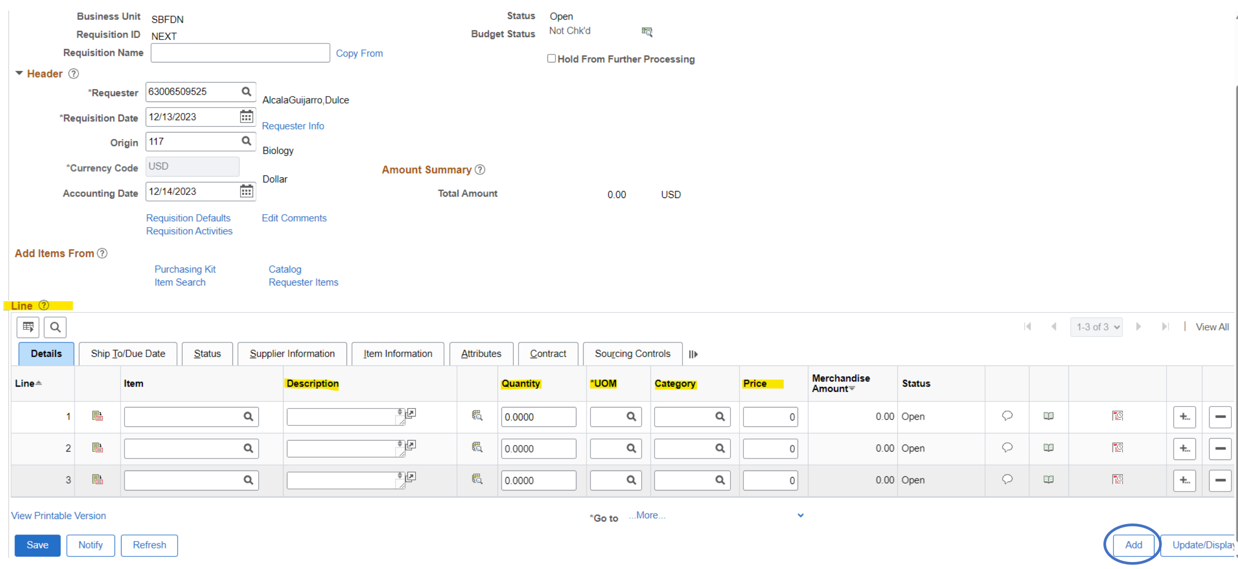


- If the vendor has provided a price for the shipping/freight this should be added into the comments section and not listed as a line item.
- As rule of thumb you should always add “ATTN: YOUR NAME” in the comments section so it is clear who the package is for when it is received.

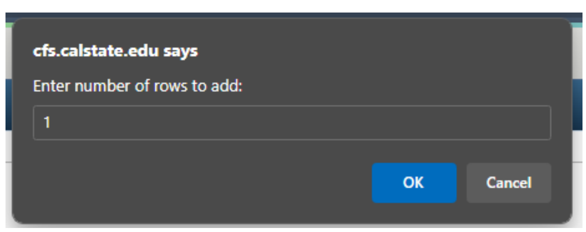


- Once you have added all the necessary information and attached the quote you can now click OK and it will take you back to the main requisition page.

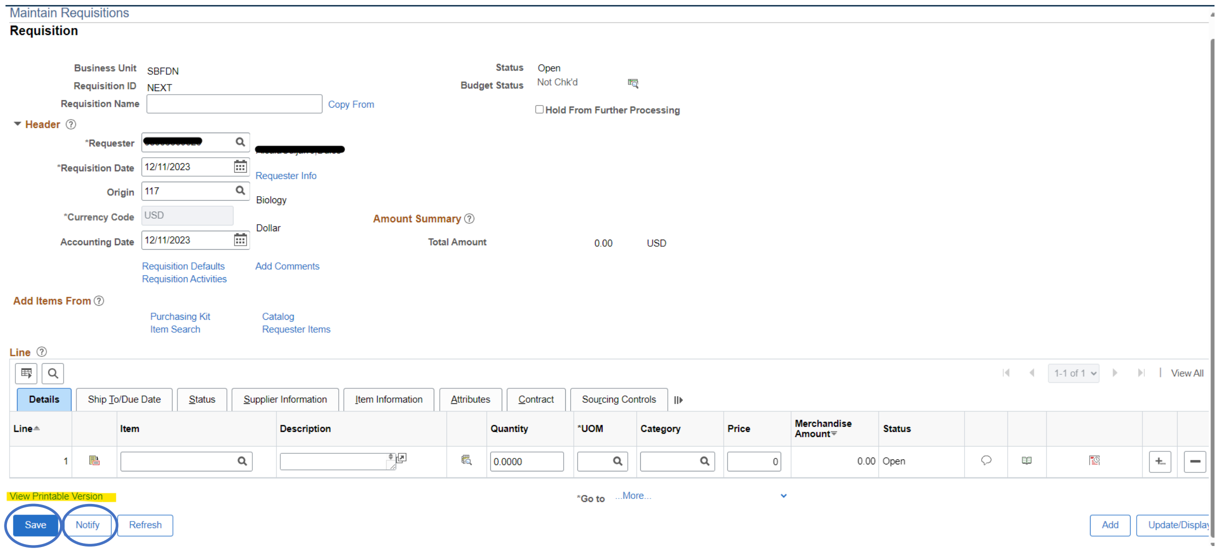
Adding Line Items



- 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.



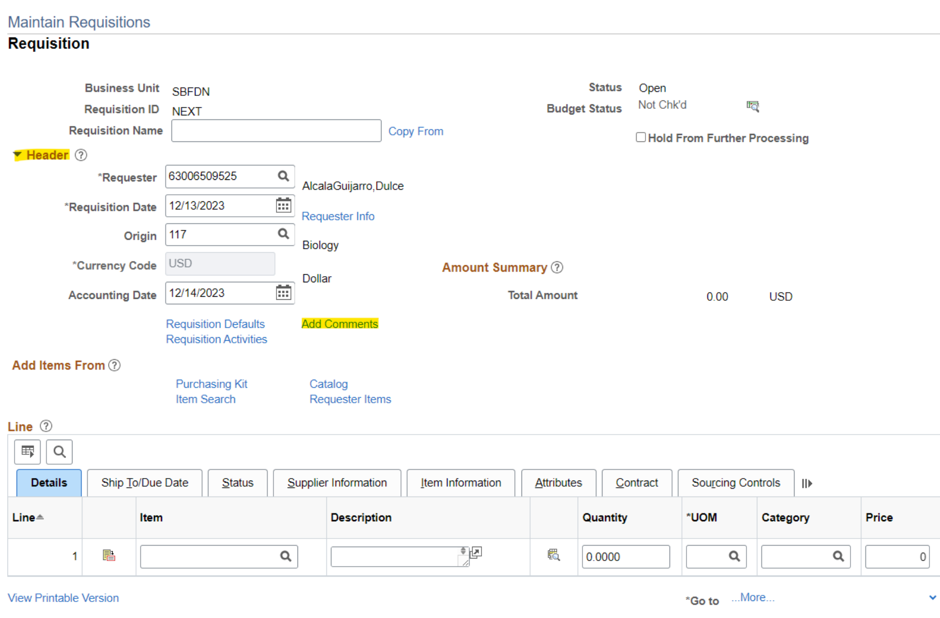
- Please remember that you should not include the taxes or shipping as a line item, if the vendor provides these in the quote please only add these in the header comments section as explained above.
- However, if there are any additional fees aside from the tax and shipping/handling you will have to 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.



- 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.

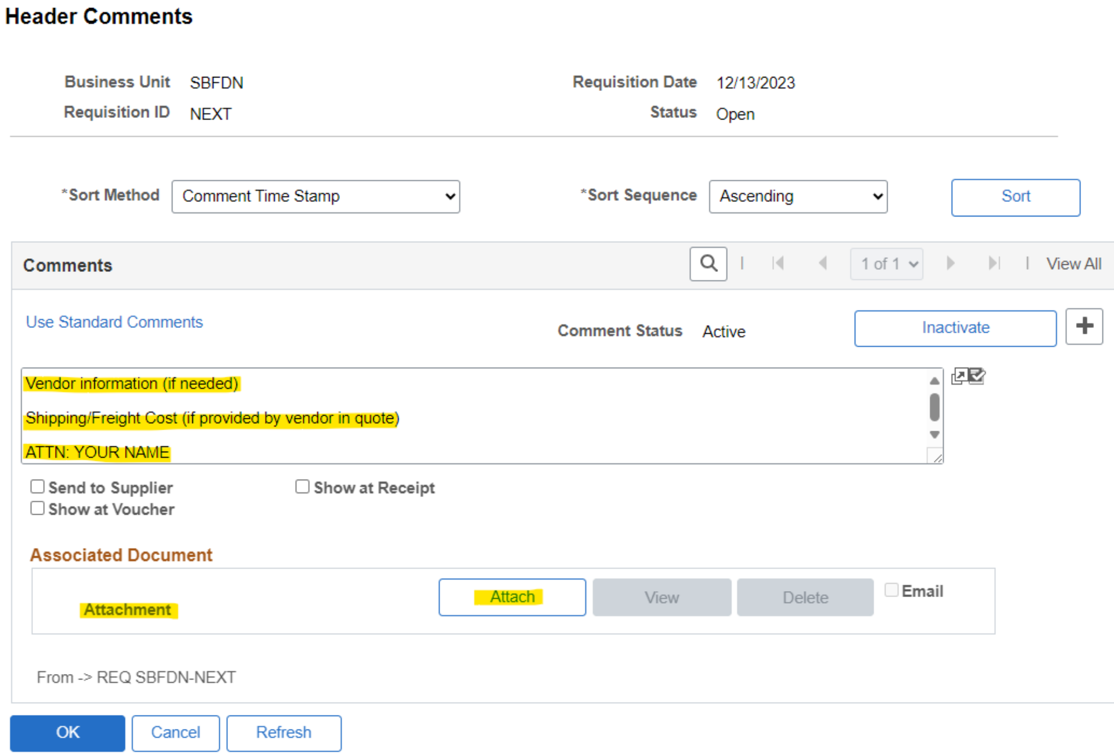
Adding Vendor Information to Header Comments

- 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'



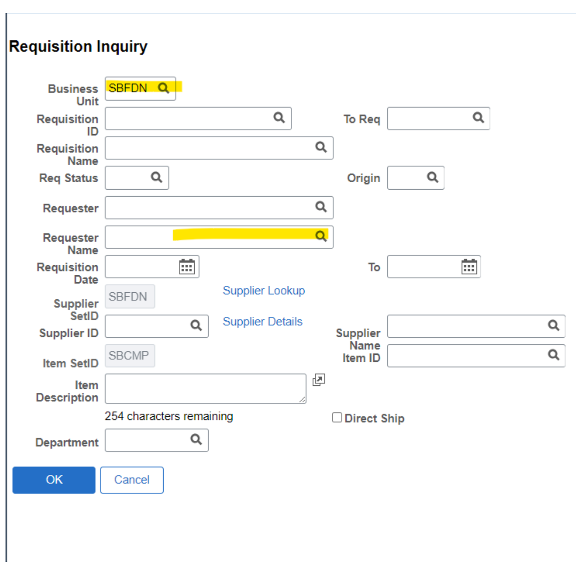
- It will be important to add all the vendor information you have in the header comments section so that purchasing can use this information to contact the vendor and create a supplier profile for them.

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



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.

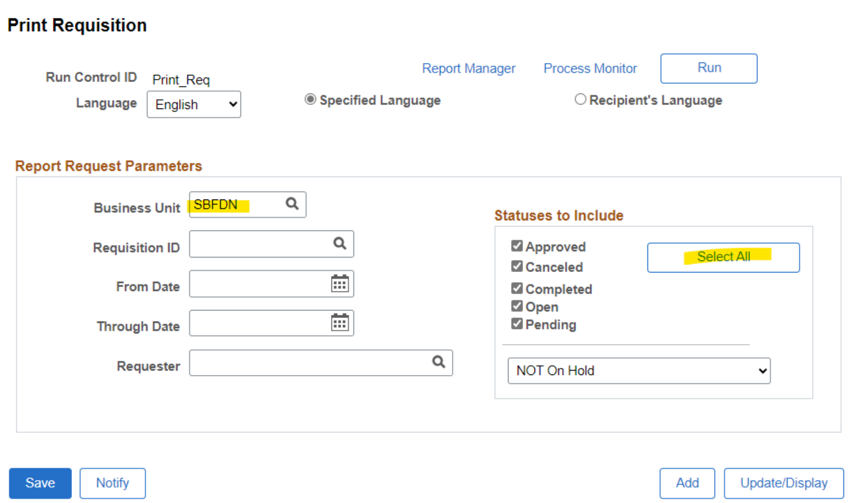


- Change the Business Unit to SBFDN > type your last name in the requestor name section, your name should appear click on it > OK

- 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.

<u>Printing Requisitions</u>

- 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.



  - 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.