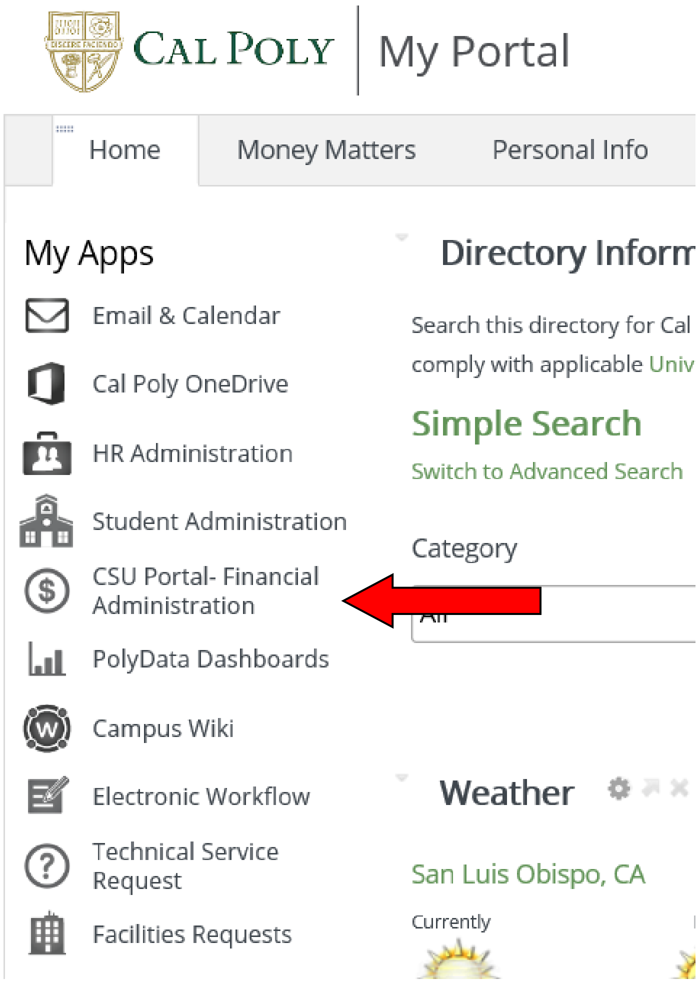
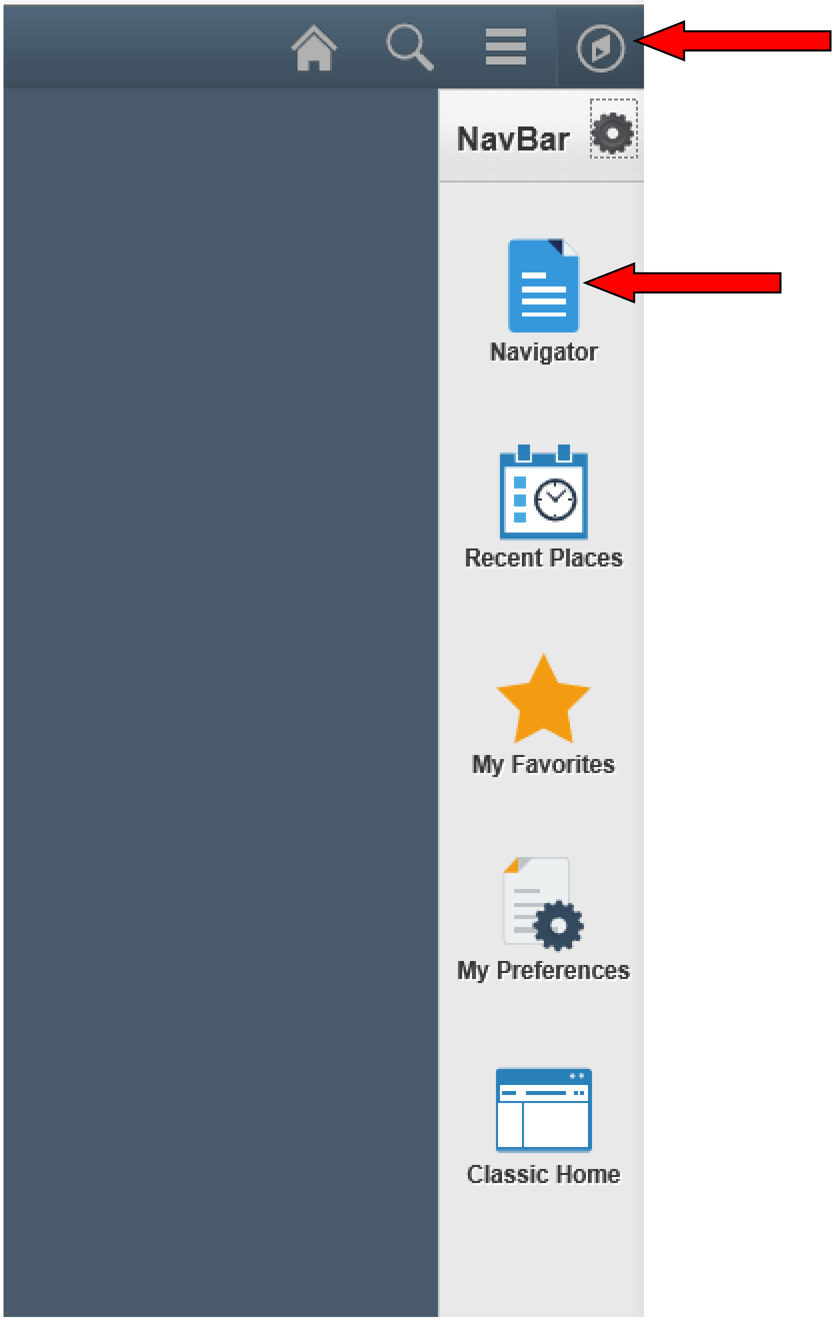
CAL POLY
Administration & Finance
Strategic Business Services

How to Enter a Purchase Requisition

On the Cal Poly Portal click **CSU Portal- Financial Administration**

Pro Tip: Internet Explorer is the recommended web browser for optimal system function.



Click on the diamond-shaped NavBar icon at the top right of the homepage, then follow this path: **Navigator**	

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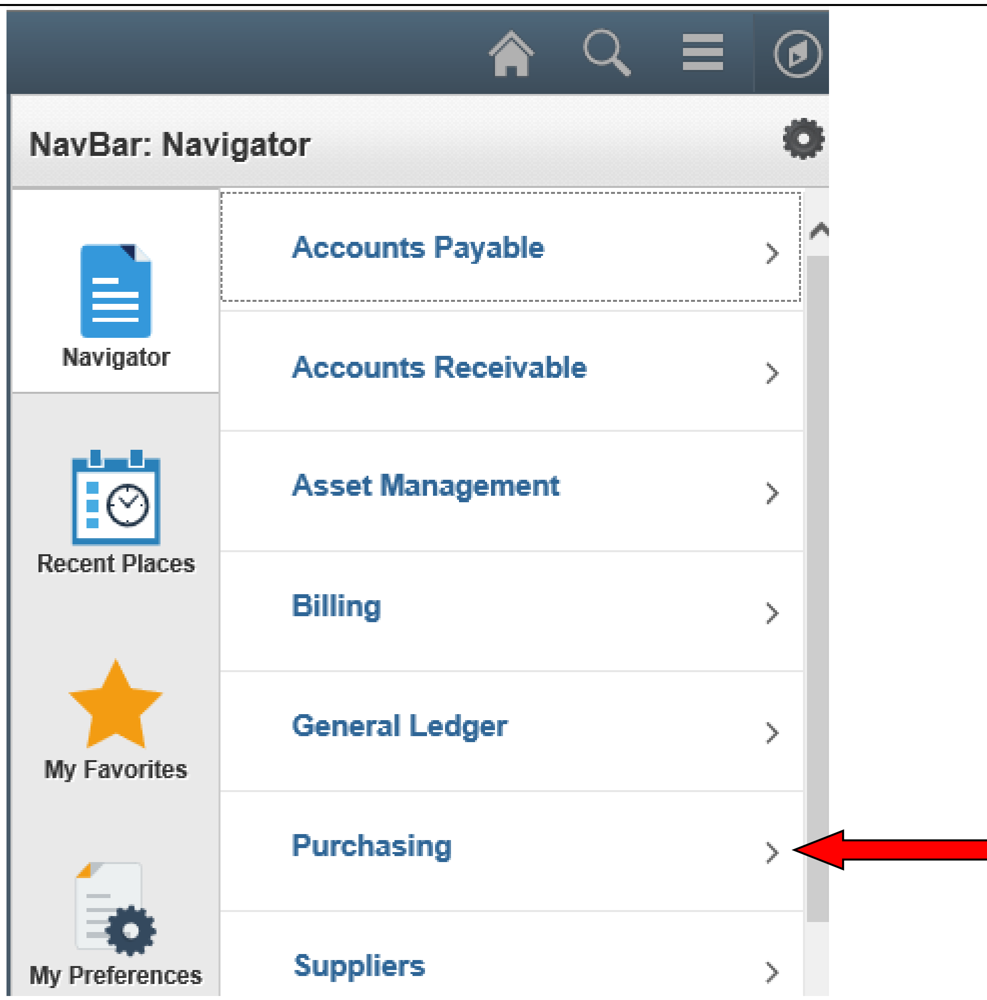
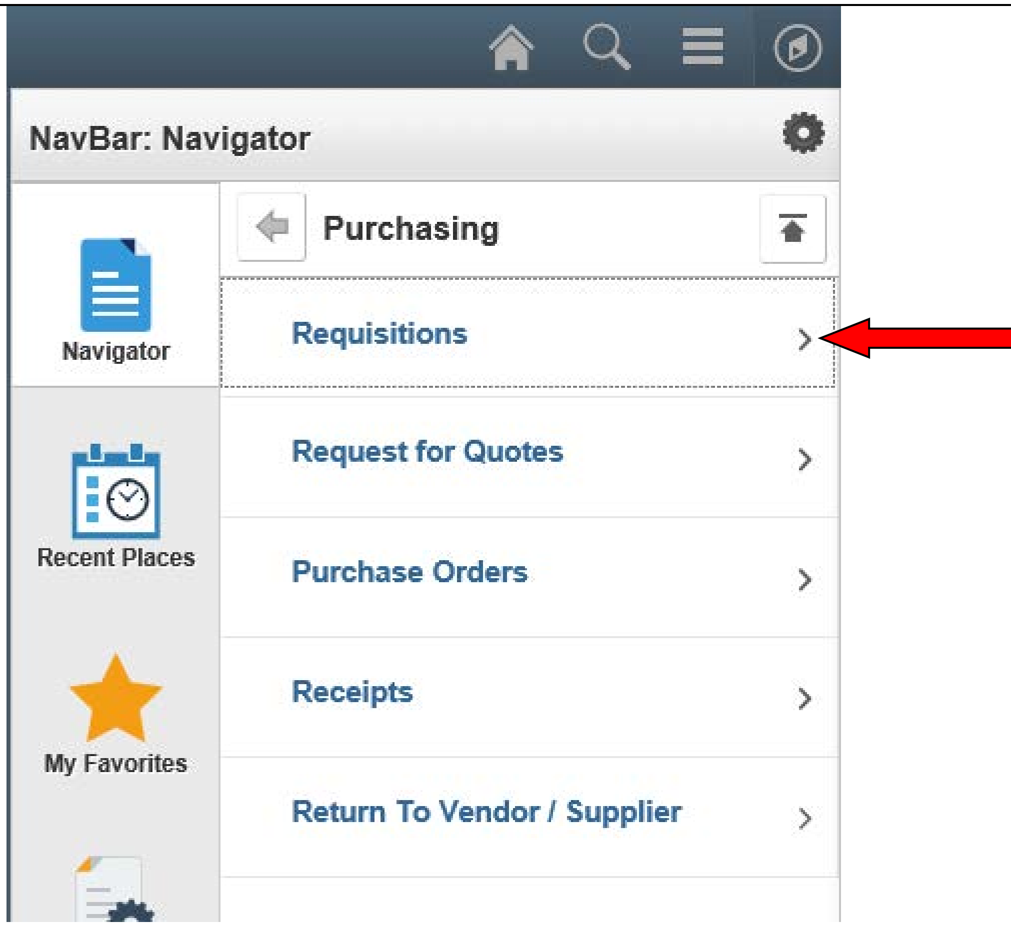
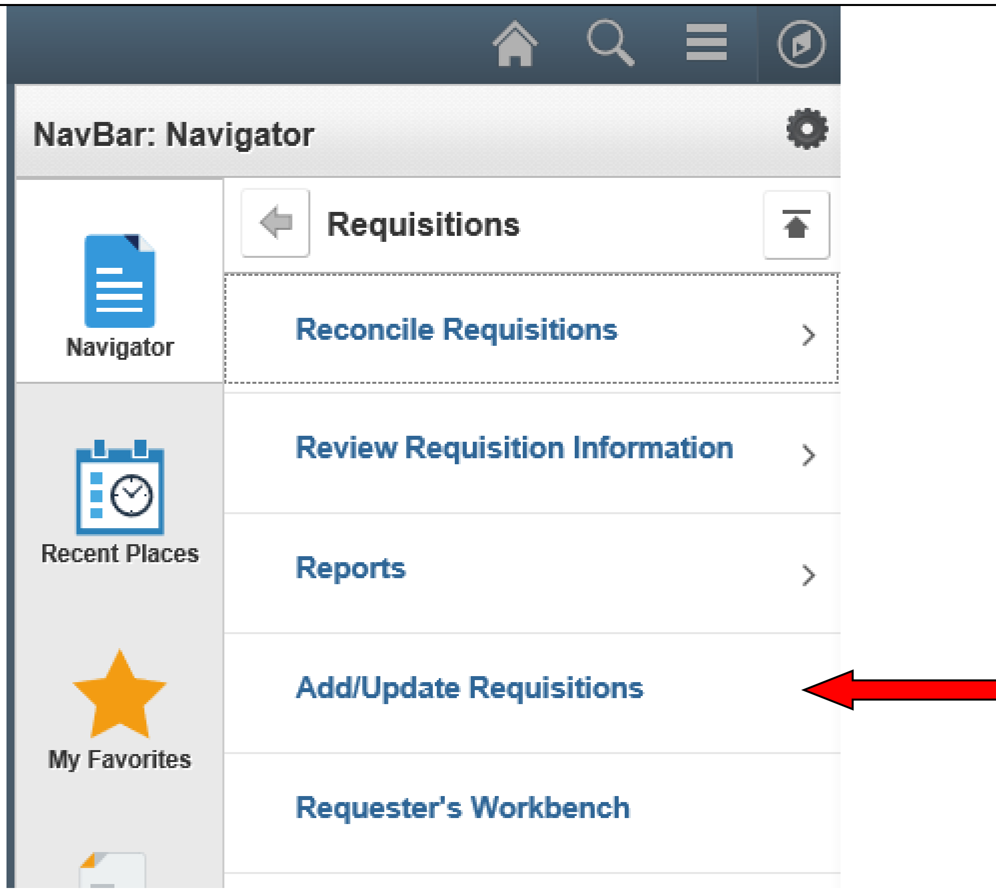
Purchasing	

Requisitions	

Add/Update Requisitions	

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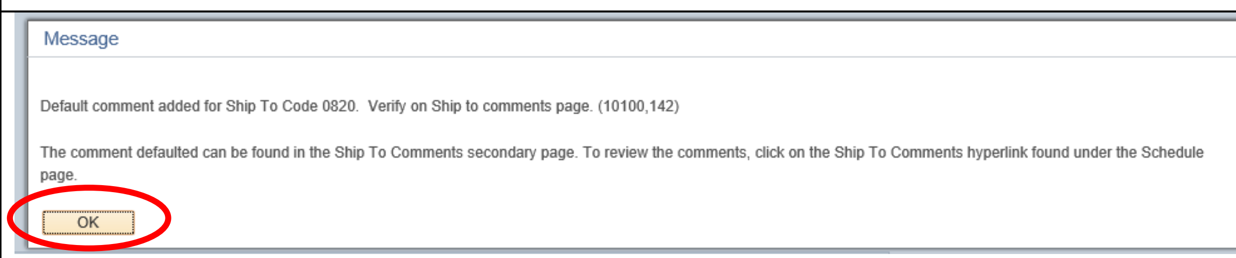
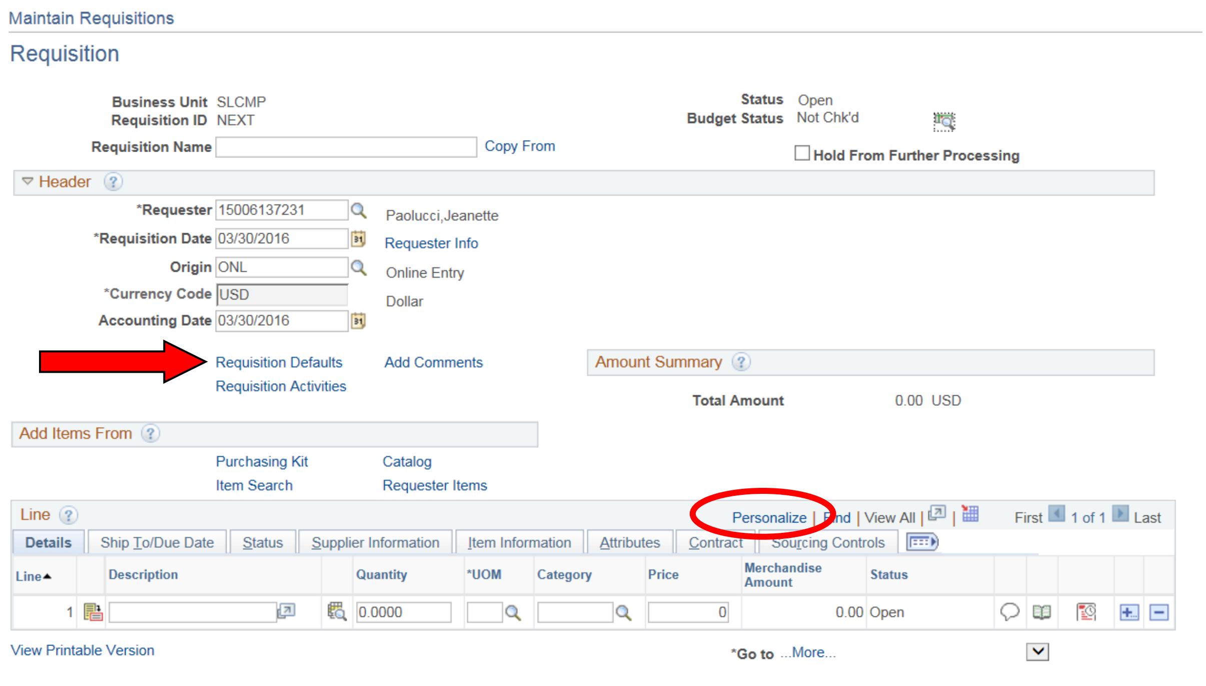
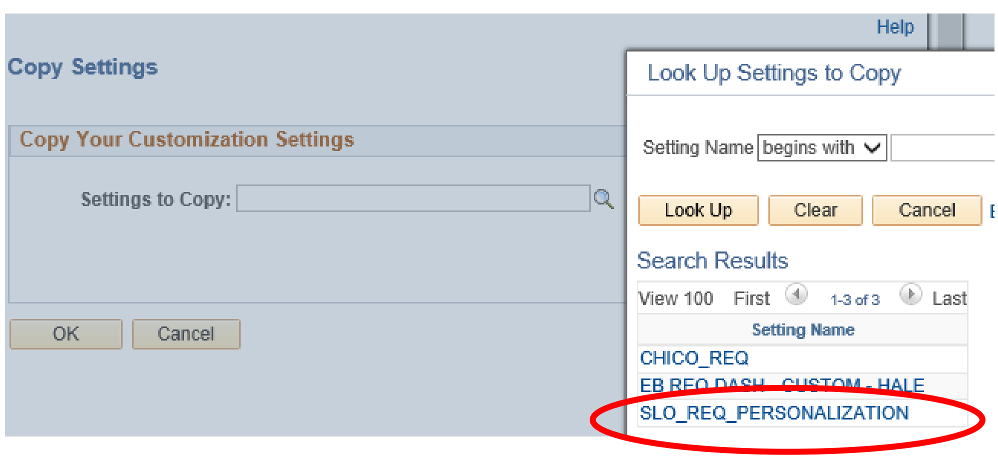
This is the **Add/Update Requisitions** page. **Pro Tip:** To find this page easily next time, use this drop down  found at the top right of this screen and choose **Homepage** or **Favorites**. On the **Add a New Value** tab click on **Add** (Do Not change the Business Unit or Requisition ID fields)	
Click **OK** through this message	

This is the main requisition page.

Pro Tip: Use the **Personalize** hyperlink to show only what you need to see here. On the pop-up screen scroll down and click **Copy Settings**. Click the magnifying glass and choose **SLO_REQ_PERSONALIZATION** then click **OK** and then **OK** again. You will only have to do this once.

Back on the main requisition page click the **Requisition Defaults** hyperlink to begin entering the required information.





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Complete the highlighted fields using the magnifying glasses and the pop-up screens.

Pro Tips:

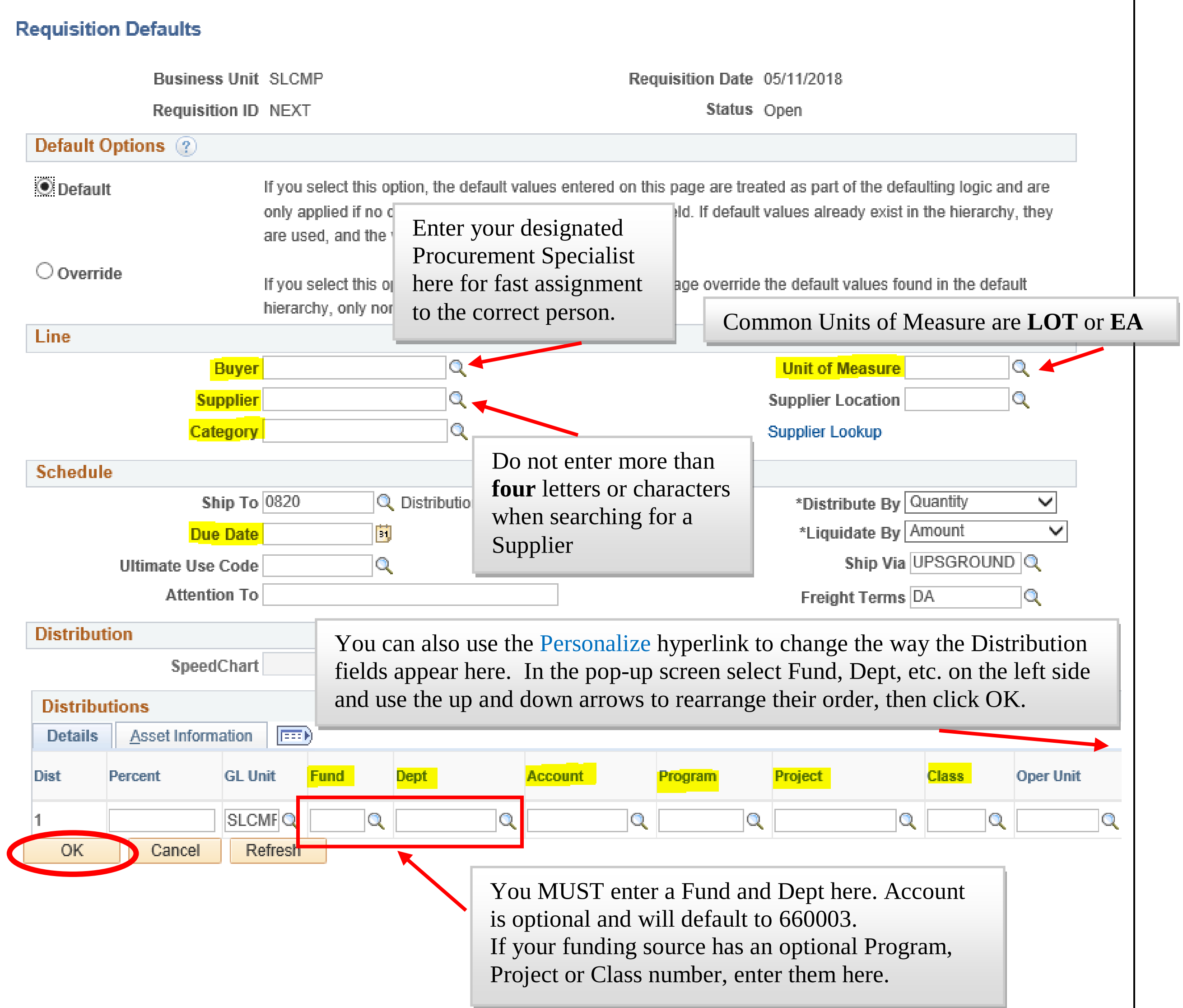
1. Your Buyer (Procurement Specialist) is easily found by typing **15** in the **Buyer begins with** field and then clicking **Look Up.**

2. When in doubt choose **No Vendor** in the **Supplier** field (it is the first one listed).

3. In the **Category** search, services begin with a 9 and all other numbers (1-8) designate a physical item.

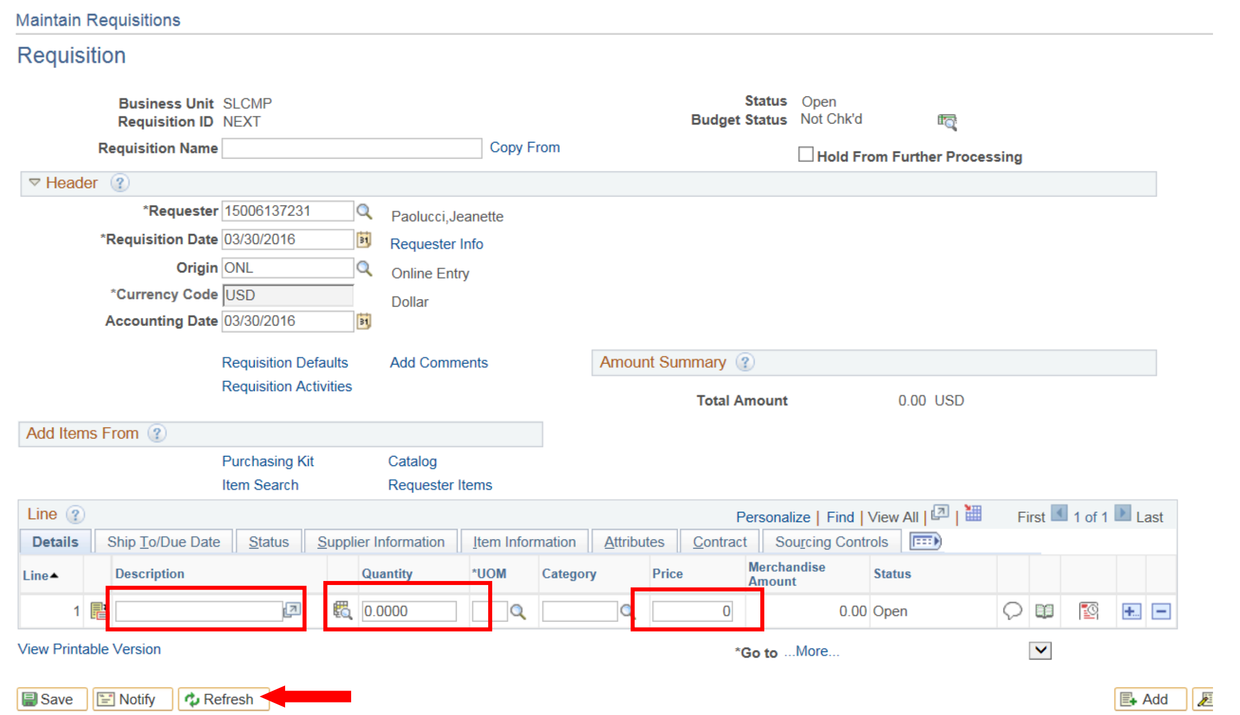
4. Only enter a **Due Date** if a certain date is important.

Once this page is completed click **OK**



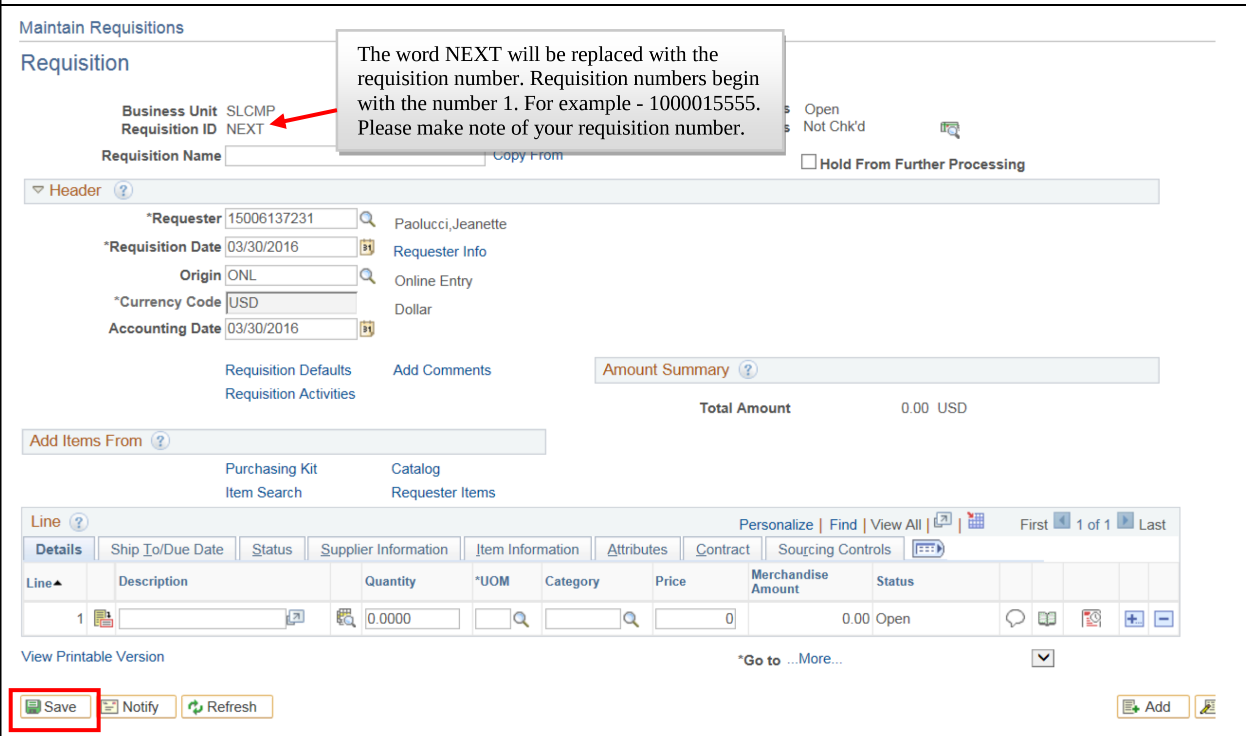
You will be back on the main requisition page.

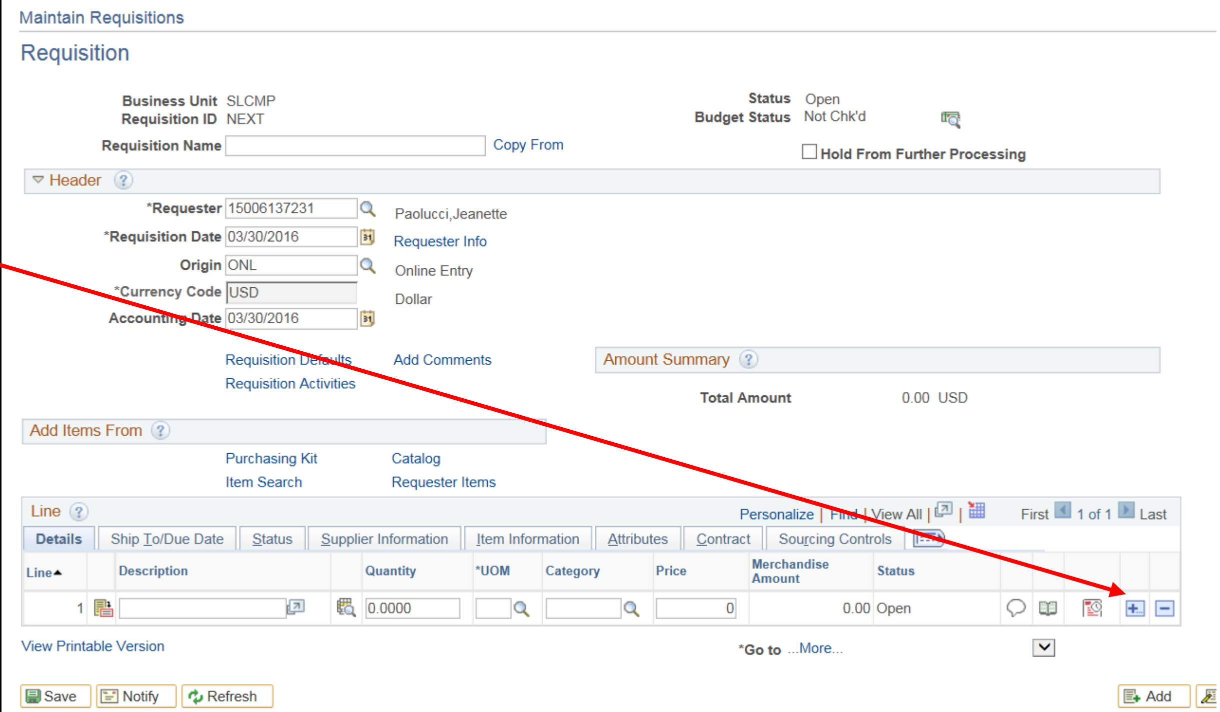
After populating the fields highlighted in red, click **Refresh**. This will auto-populate the remaining fields.

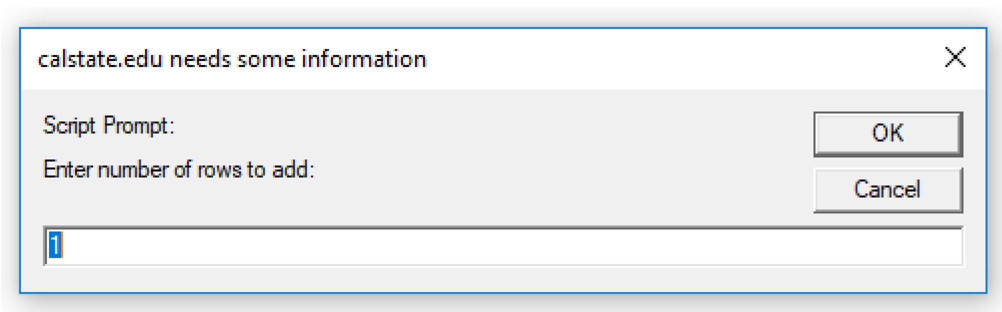


This is the minimum amount of information to click **Save** and obtain a **Requisition number.**

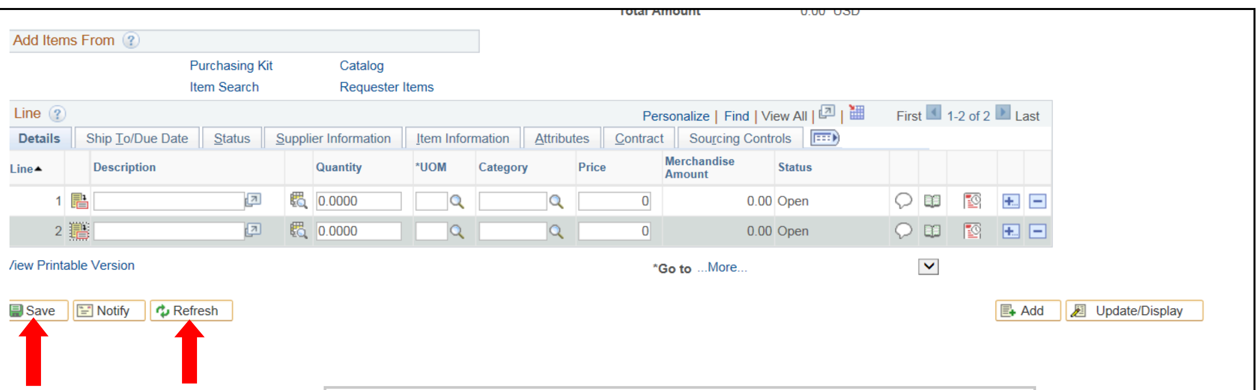
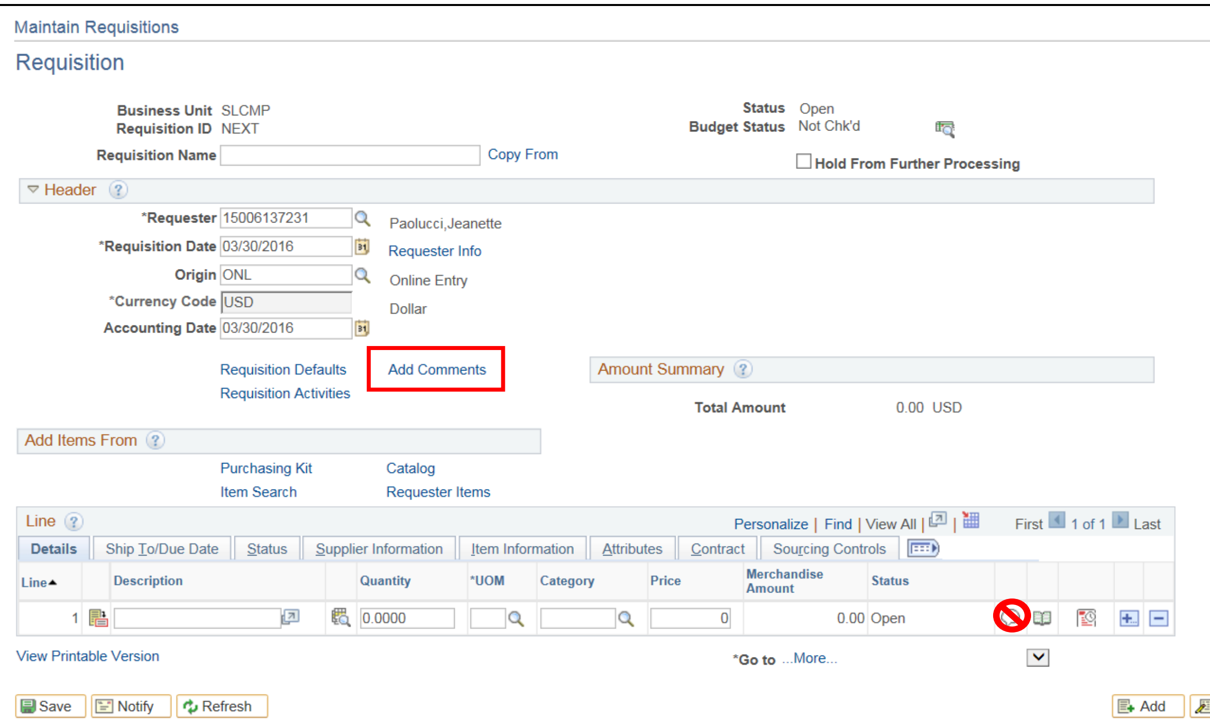
Pro Tip: The system times out often so it is important to save at this point.



<table>
<tr>
<td>You can add more lines to the requisiton by selecting the + at the far right side.</td>
<td>
</td>
</tr>
<tr>
<td>In the pop-up screen enter in the number of lines you would like to add then click OK.

Pro Tip:
Use a minimal number of lines, but enough to be clear and also reflect the vendor's quote. Use separate lines for unique types of items such as goods vs. services vs. shipping.</td>
<td>

You do not need to add a line for sales tax. Sales tax will be reviewed and assigned by your Procurement Specialist to applicable lines.</td>
</tr>
</table>

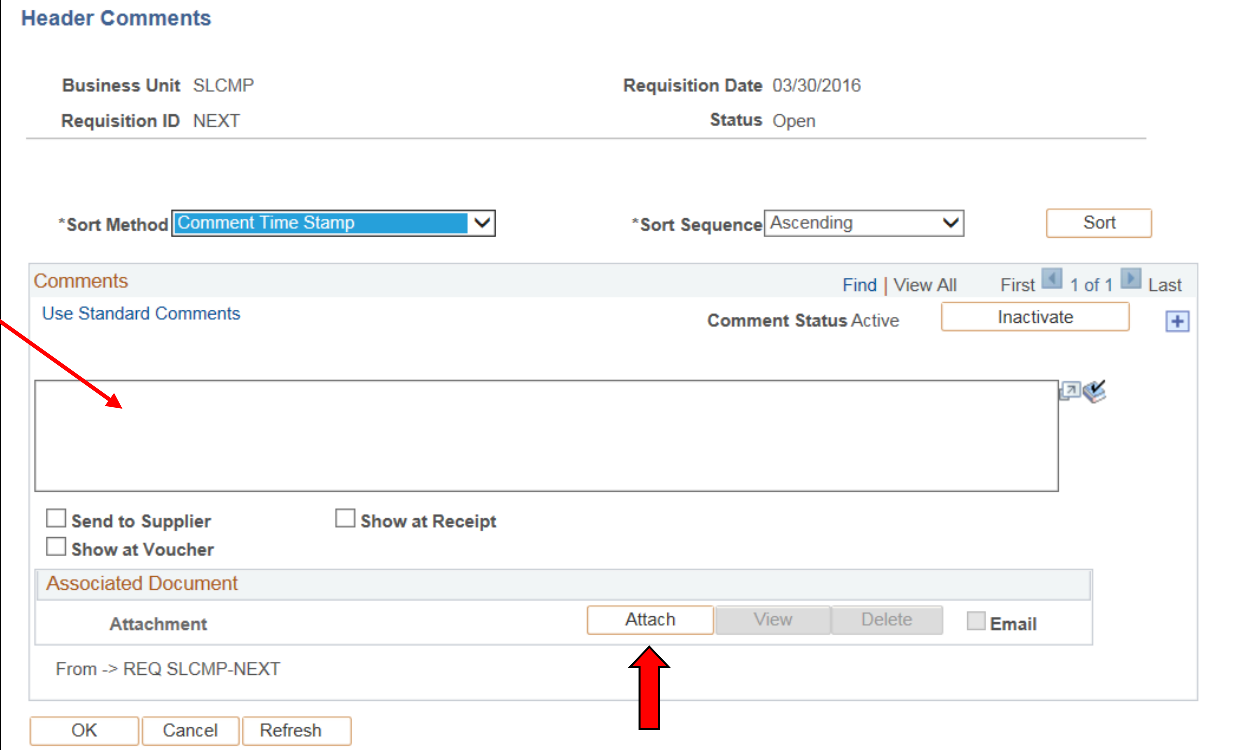
The lines will be added. Continue populating the required fields and clicking **Refresh** to auto-populate the remaining fields. When finished adding lines, click **Save**.	 For a line item with a different category type than entered in Requisition Defaults, change the category number on that specific line at this time.
Click on the **Add Comments** hyperlink to attach backup paperwork. **Pro Tips:** 1. Backup paperwork includes items such as: the vendor's quote, other quotes you received for comparison, an approved building permit, or new vendor form/W-9. 2. Do <u>not</u> use line comments.	

Use the blank space to type anything you would like your Procurement Specialist to know about your purchase.

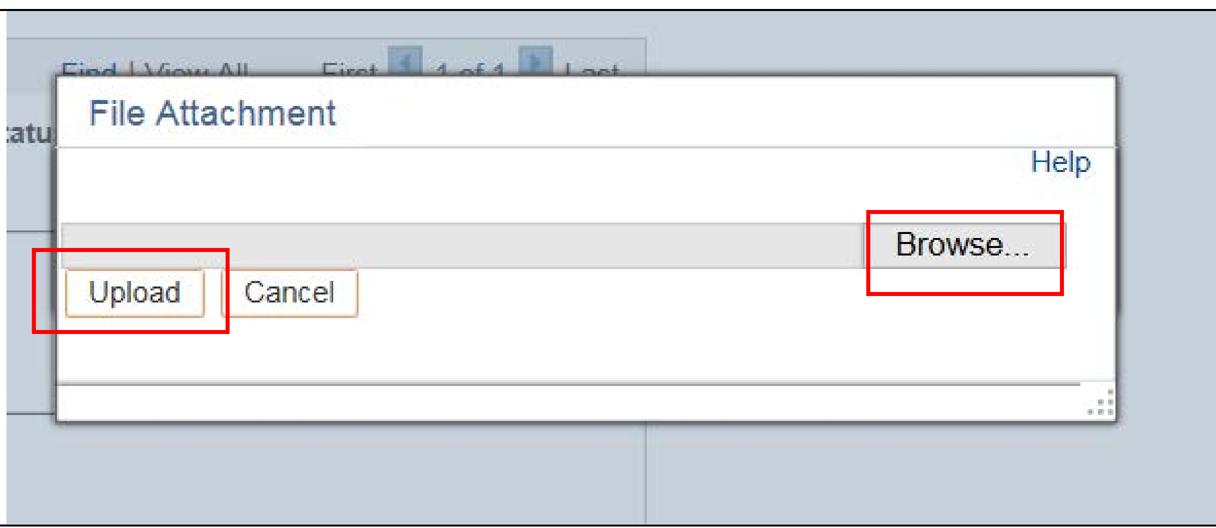
Pro Tips:
1. This is a great location for the vendor contact name, email address and phone number.

2. It is not necessary to select the Send/Show checkboxes.

Click **Attach** to add your backup.



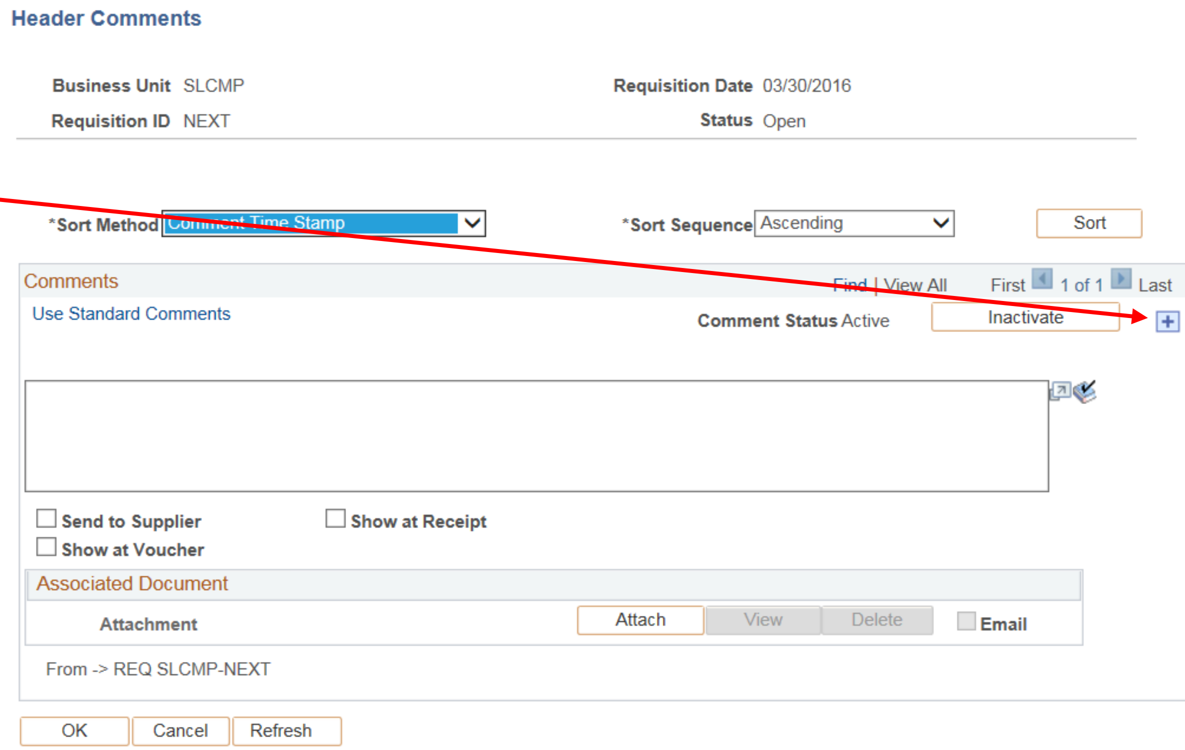
Click **Browse** first to find your file and once the file is selected, click **Upload.**



If you have another file to attach Click the + at the right side to add another comment box.

Pro Tip:
If **View All** displays as a hyperlink, there is more than one comment box. Click the **View All** hyperlink to show all boxes.

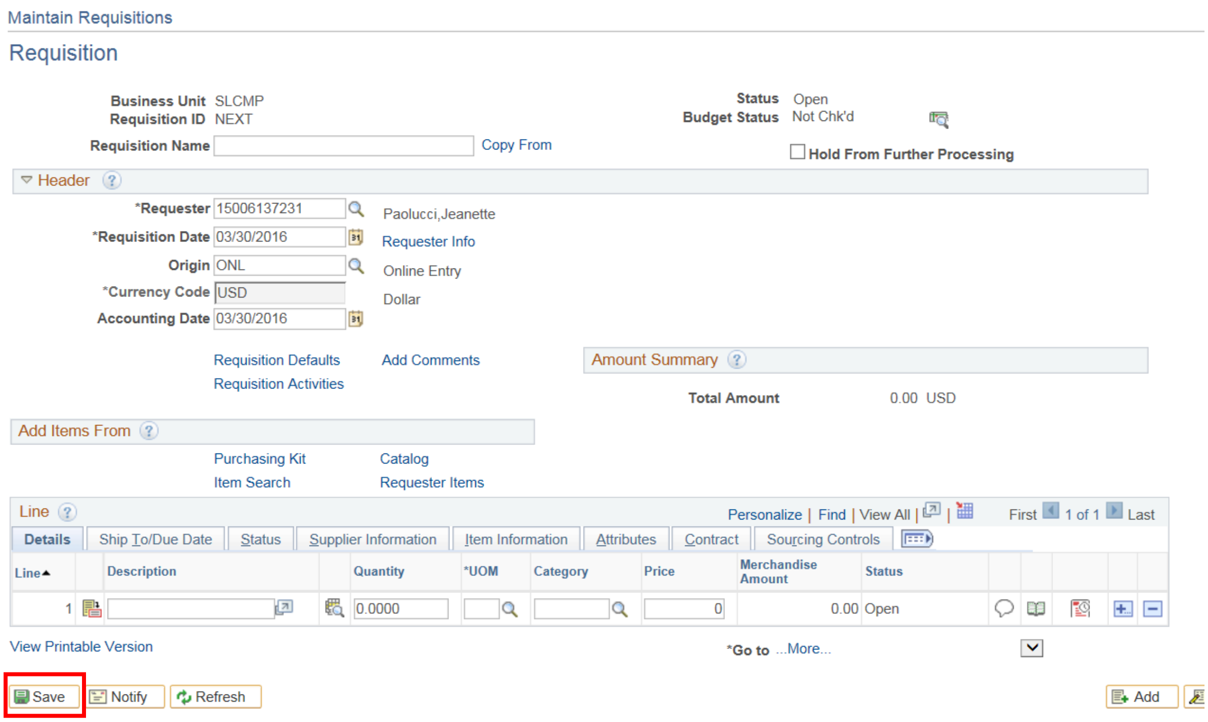
If you are finished attaching all backup documentation, click **OK**.



You will now be back on the main requisition page. Click **Save**.

Your requisiton is complete.

Pro Tip:
If you need to update something specific later in the requisition, select the **Hold From Further Processing** checkbox. It will <u>not</u> be made available to your approving official and you will be able to come back and make the update. Once you are finished with the update, unselect **Hold From Further Processing** and click **Save**. The requisition will now be available to your approving official.



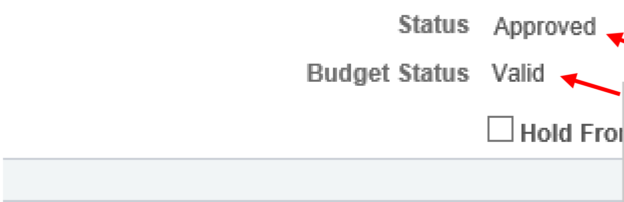
Communicate the requisition number to your approving official with your approval request. They will not receive an automatic notification.

Your approving official must **approve and budget check** the requisition before your Procurement Specialist can see it in their workflow.

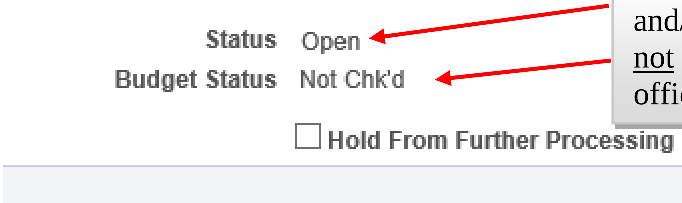
If you do not know who your approving official is call Valerie Maijala at 6-1187.

Please allow approximately 10 days for processing.

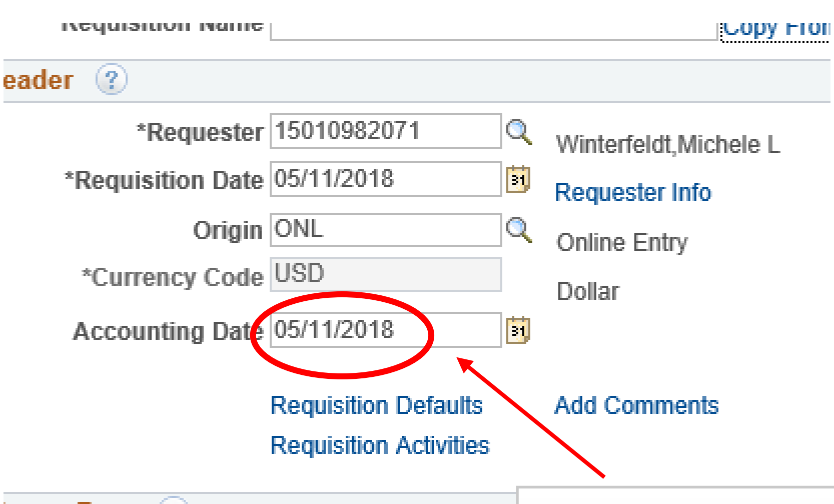
Call your designated Procurement Specialist or 6-2232 with any questions.



When the requisition is fully approved the Status will show as **Approved** and the Budget Status as **Valid**.



If the requisition shows Status **Open** and/or Budget Status **Not Chk'd**, it is not fully approved by the approving official.

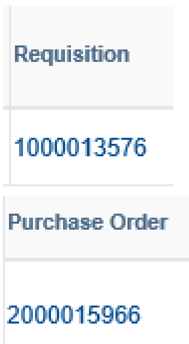


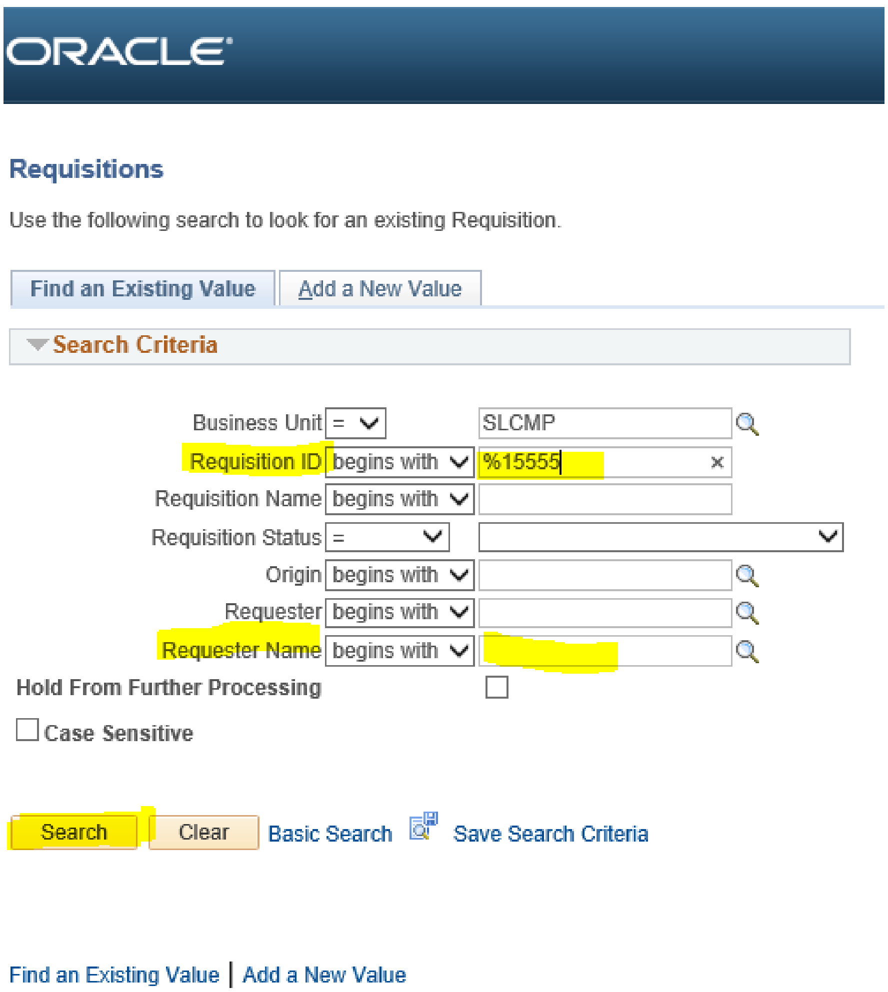
If you or your approving official receive an error message when accessing a requisition, you might need to update the Accounting Date on the main page before proceeding. The Accounting Date must always be a date within the current month.

Bonus Pro Tips:

1. Requisition numbers start with a 1, and Purchase Order numbers start with a 2.

2. Once a requisition is saved, you can search for it from the **Add/Update Requisitions** page on the **Find an Existing Value** tab. Search by **Requester Name** (last name), or by **Requisition ID**. To avoid typing all of the digits of the requisition number in the **Requisition ID** field, type a **%** and only the **last 5 digits** of the requisition number. This is also where your approving official will search to approve your requisition.

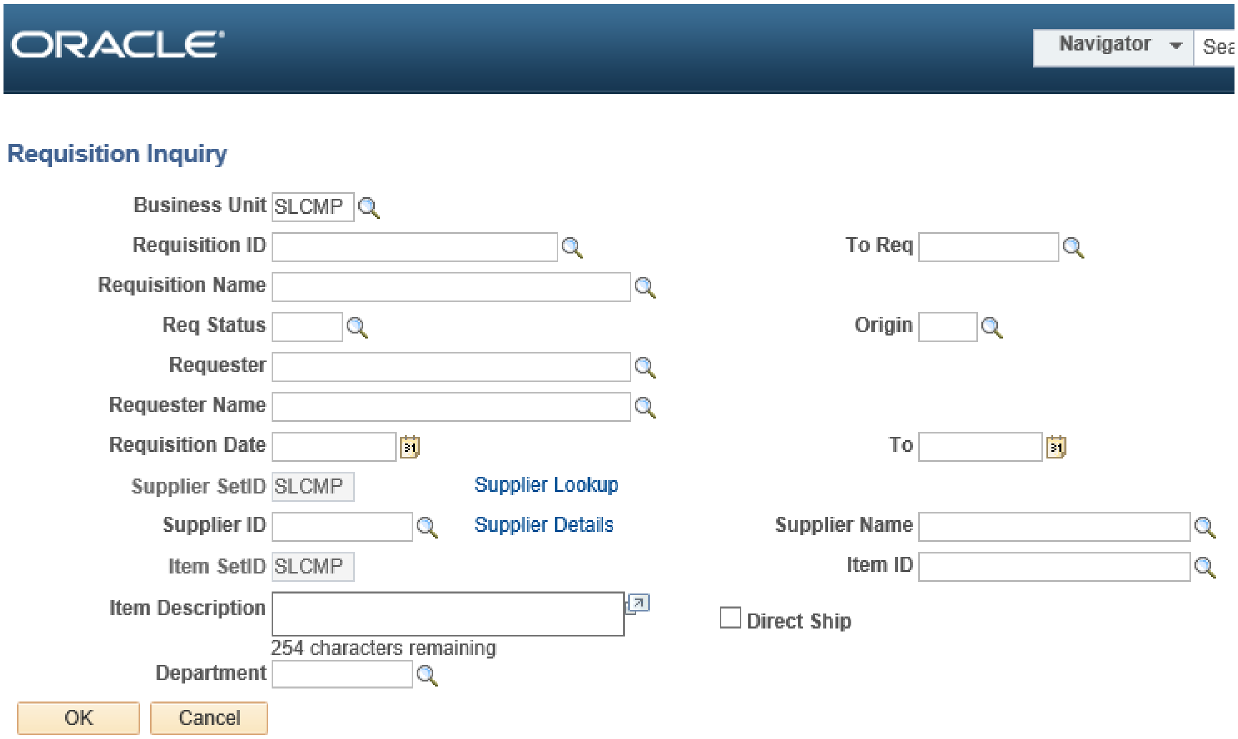




3. You can also search for a requisition in **Requisition Inquiry** using this path on the NavBar: **Purchasing, Requisitions, Review Requisition Information, Requisitions.**

Searchable fields include: **Requisition ID**, **Requester Name**, or **Supplier Name**.

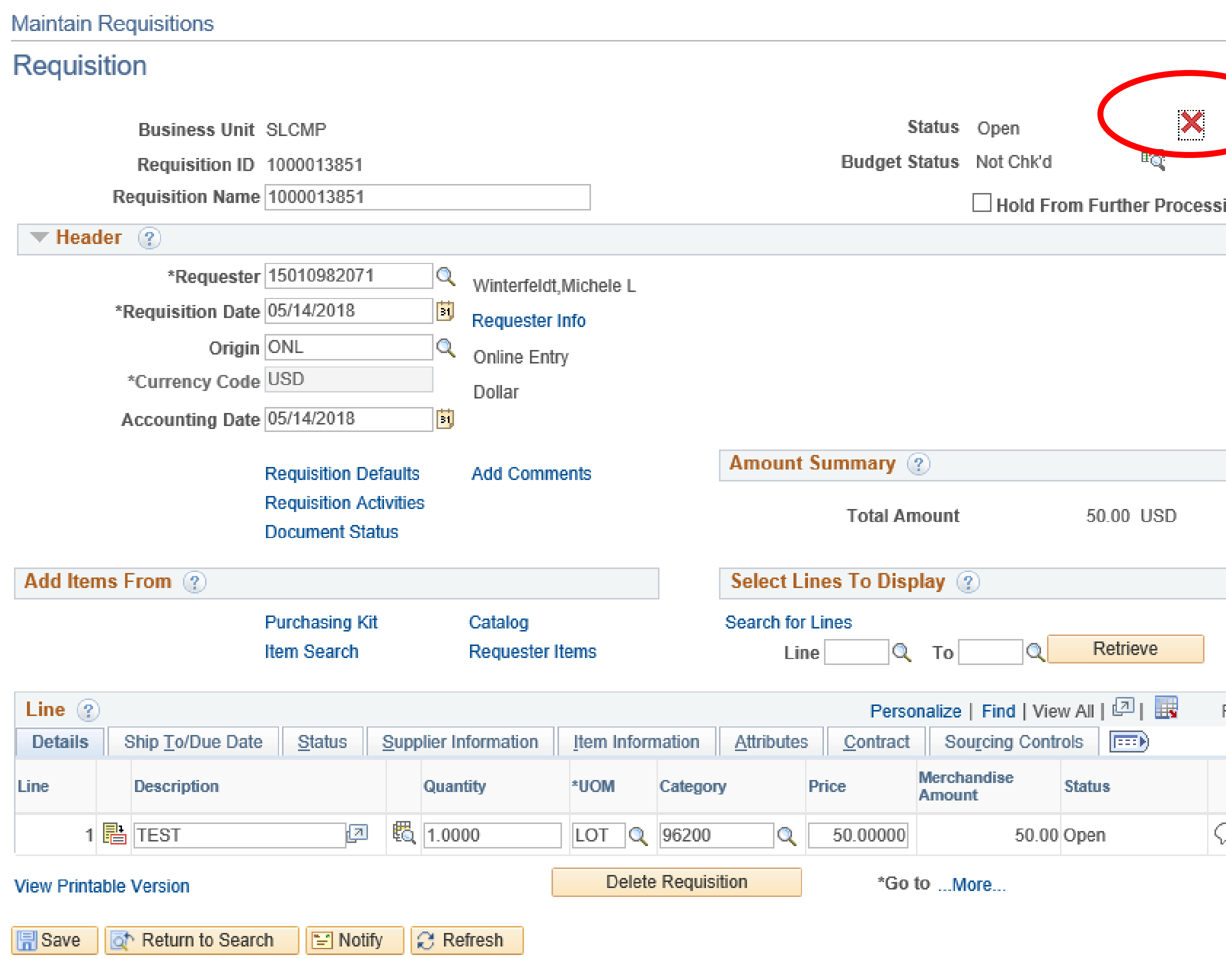
Please note, this is <u>not</u> where your approving official approves your requisition. It is for inquiries only and contains very limited information.

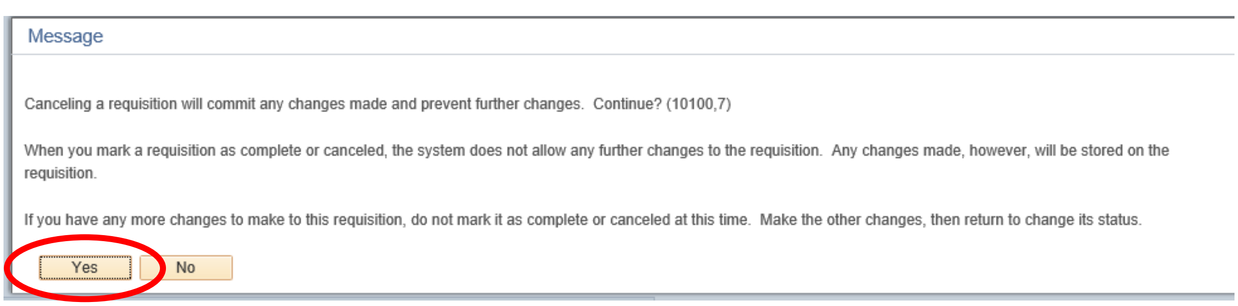


4. To cancel a requisition, go to **Add/Update Requisitions** and search for it on the **Find an Existing Value** tab. On the main requisition page, click on the red **X** in the upper right-hand corner and then click **Yes** at the pop-up message.

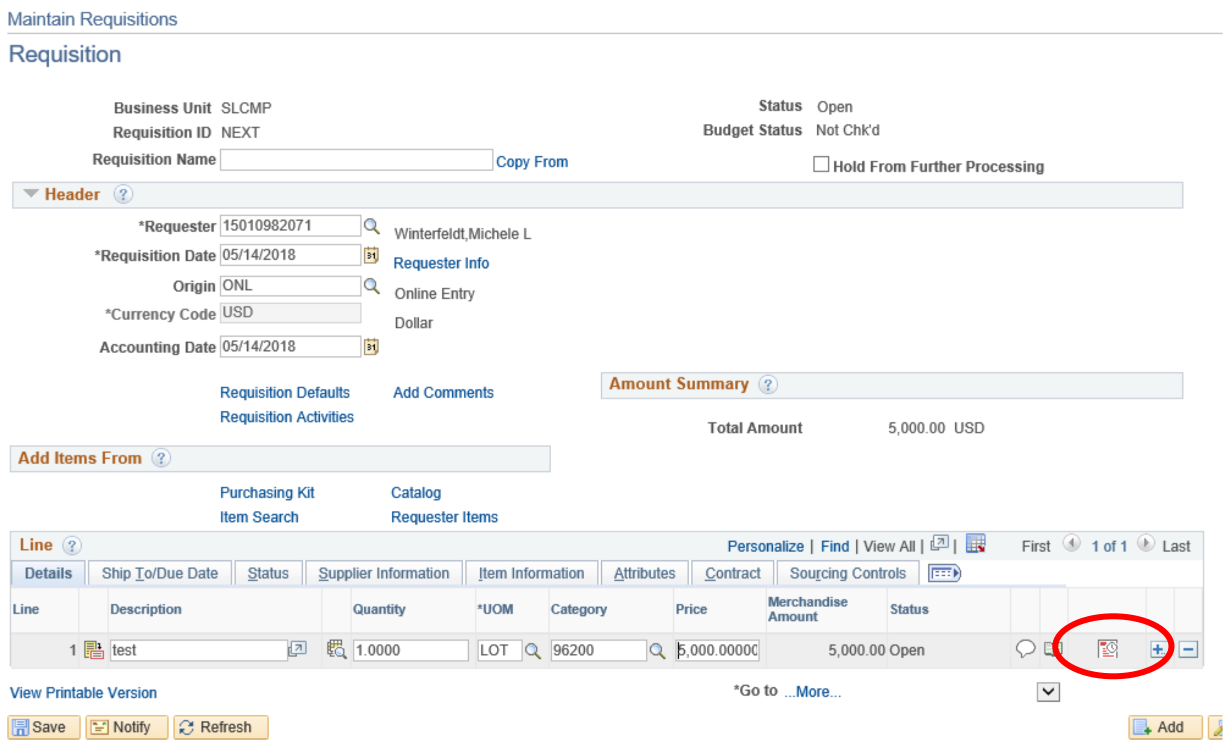
You may not have the ability to cancel the requisition if your approving official has accessed or approved the requisition.

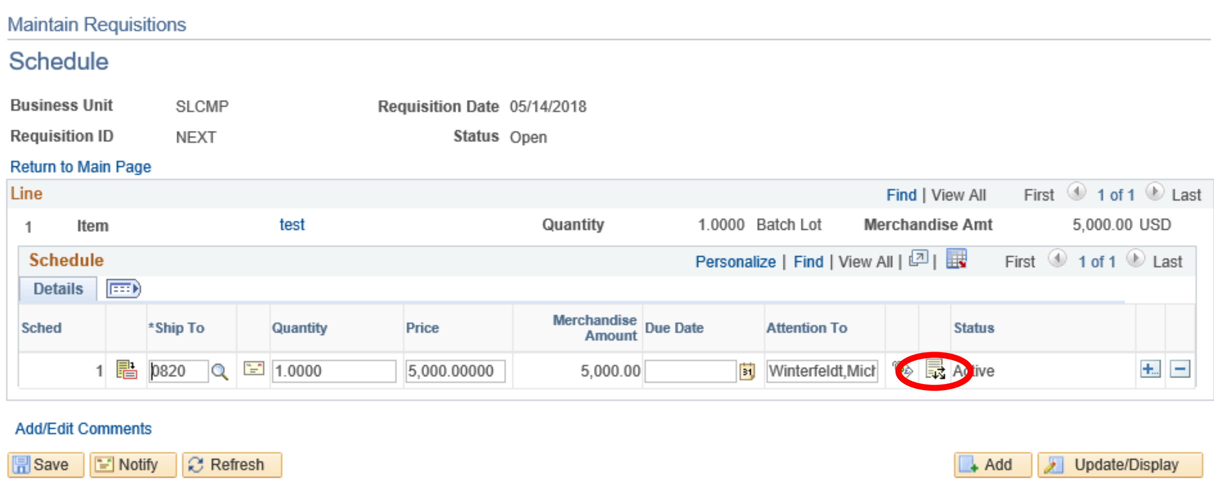
If your approving official is also unable to cancel the requisition, please request assistance from your designated Procurement Specialist.

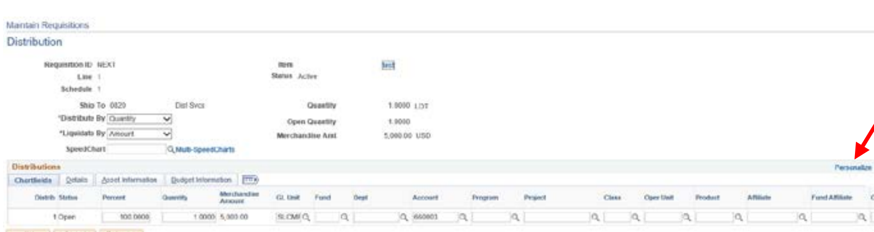




5. To update the chartfield on a specific requisition line, click the **Schedule** icon on the main requisition page for the line you want to update. On the **Schedule** page click the **Distribution** icon. Make any updates to the chartfield on the **Distributions** page. This only affects the chartfield for the selected line item.







Use the Personalize hyperlink on this page to rearrange the order of fields here.

6. To split a requisition line amount using two or more chartfields, follow the directions from tip #5 on the previous page. On the **Distributions** page, use the + at the far right of the screen to add one or more rows at the prompt. Then add the other chartfield(s) you would like to use.

If you would like to split by a dollar amount rather than a percentage, click on the **Distribute By** drop down. Change from **Quantity** to **Amount**. Adjust the **Merchandise Amount** fields to reflect the desired split.