How to Enter a Purchase Requisition

On the Cal Poly Portal click CSU Portal-Financial Administration

Continue with your 2-Step Verification sign-in process.

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

Pro Tip:
Do not use the “Back” or “Forward” buttons in your web browser. Navigate within the system by using system buttons, hyperlinks, and/or NavBar icons and lists.
Once in the CFS system, click on the diamond-shaped NavBar icon at the top right of the homepage, then follow this path:

**Navigator**
This is the Add/Update Requisitions page.

**Pro Tip:**
To find this page easily next time, use this menu found at the top right of this screen and choose Add to Homepage or Add to 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 **Grid Customization** screen click on **Item** and check the **Hidden** box in the divider. **Item** is not used, so it is best to hide it. You will only have to **Personalize** once. Scroll down and click **OK**.

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

<table>
<thead>
<tr>
<th><strong>Requisition Defaults</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Unit</strong></td>
<td>SLCMF</td>
</tr>
<tr>
<td><strong>Requisition ID</strong></td>
<td>NEXT</td>
</tr>
<tr>
<td><strong>Requisition Date</strong></td>
<td>05/11/2016</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Open</td>
</tr>
</tbody>
</table>

**Default Options**
- **Default**: Select this option if the default values entered on this page are treated as part of the defaulting logic and are only applied if no other options are used, and the values already exist in the hierarchy, they will override the default values found in the default.
- **Override**: Select this option if the default values are not used, and the values already exist in the hierarchy, only then will the default values be overridden.

**Line**
- **Buyer**: Enter your assigned Procurement Specialist here for fastest processing by the correct person.
- **Supplier**: Do not enter more than **four** letters or characters when searching for a Supplier.
- **Category**: If your funding source has an optional Program, Project or Class number, enter them here.

**Schedule**
- **Ship To**: 0620
- **Due Date**: 8
- **Ultimate Use Code**: 2
- **Attention To**: 2

**Distribution**
- **Details**: Enter your assigned Procurement Specialist here for fastest processing by the correct person.
- **GL Unit**: SLCMF
- **Fund**: 1
- **Dept**: 2
- **Account**: 3
- **Program**: 4
- **Project**: 5
- **Class**: 6
- **Oper Unit**: 7

**Common Units of Measure are LOT or EA**

You can also use the **Personalize** hyperlink to change the way the Distribution fields appear here. In the pop-up screen select Fund, Dept, etc. on the left side and use the up and down arrows to rearrange their order, then click OK.

You MUST enter a Fund and Dept here. Account is optional and will default to 660003. If your funding source has an optional Program, Project or Class number, enter them here.
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.

The word NEXT will be replaced with the requisition number. Requisition numbers begin with the number 1. For example - 1000015555. Please make note of your requisition number.
You can add more lines to the requisition by selecting the + at the far right side.

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.

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.
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 not 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 requisition is complete.

**Pro Tip:** If you need to update something specific later in the requisition, select the **Hold From Further Processing** checkbox. If you do, the requisition will not 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 any automatic notifications.

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 assigned 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. Note: This is also where your approving official will search to approve the requisition.

<table>
<thead>
<tr>
<th>Requisition</th>
<th>1000013576</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order</td>
<td>2000015966</td>
</tr>
</tbody>
</table>

**Oracle**

Requisitions

Use the following search to look for an existing Requisition.

| Find an Existing Value | Add a New Value |

**Search Criteria**

- Business Unit: SLCMP
- Requisition ID: %15555
- Requisition Status
- Origin
- Requester Name
- Requester Name

Hold from Further Processing
- Case Sensitive

| Search | Clear | Basic Search | Save Search Criteria |

Find an Existing Value | Add a New Value
Once you search for the requisition, click anywhere along the blue hyperlinked text in the Search Results line to view the requisition.

Click OK through this message

Default comment added for Ship To Code 0020. Verify on Ship to comments page. (10190, 142)

The comment default can be found in the Ship To Comments secondary page. To review the comments, click on the Ship To Comments hyperlink found under the Schedule page.
3. You can also search for any 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 not where your approving official approves your requisition. It is for inquiries only and contains very limited information.
4. To cancel a requisition, click on the red X in the upper right-hand corner of the main requisition page. Click Yes at the pop-up message.

**Note:** You may not be able to cancel a requisition if your approving official has already accessed or approved the requisition. They may be able to cancel it using these instructions. If your approving official is also unable to cancel the requisition, your assigned Procurement Specialist has pulled the requisition over for processing. Contact your Procurement Specialist to cancel the requisition.
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.