### How to Enter a Purchase Requisition

<table>
<thead>
<tr>
<th><strong>On the Cal Poly Portal</strong></th>
<th>click CSU Portal - Financial Administration</th>
</tr>
</thead>
</table>

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

**Pro Tip:** Chrome 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, first click on the diamond in a circle icon at the top right of the homepage, then follow this path on the NavBar:

**Navigator**
Purchasing

Navbar: Navigator

- Accounts Payable
- Accounts Receivable
- Asset Management
- Billing
- General Ledger
- Purchasing
- Suppliers
Requisitions

Navbar: Navigator

- Purchasing
  - Requisitions
  - Request for Quotes
  - Purchase Orders
  - Receipts
  - Return To Vendor / Supplier
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

Default comment added for Ship To Code 0820. Verify on Ship to comments page. (10100,142)
The comment default 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.
This is the main requisition page.

**Pro Tip:**
Click on this icon and **Personalize** 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. The **Item field** 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**.

**Important!** Change from **Default to Override here**

**Enter your assigned Procurement Specialist here for fastest processing by the correct person.**

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

**Enter no more than four letters or characters when searching for a Supplier**

You can click on this icon to Personalize and reorder the fields to match the ones below. You’ll only have to do this once. 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.

**Note:** These requisition defaults will be applied to all lines you enter on the requisition.
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 - 1000025555. 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 with a different category type than you entered in Requisition Defaults (e.g., a line for services or freight instead of goods), 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 10 business 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.

### Requisitions

Use the following search to look for an existing Requisition.

<table>
<thead>
<tr>
<th>Find an Existing Value</th>
<th>Add a New Value</th>
</tr>
</thead>
</table>

#### Search Criteria

- **Business Unit**: SLCMP
- **Requisition ID**: begins with %21606
- **Requisition Name**: begins with
- **Requisition Status**: =
- **Origin**: begins with
- **Requester**: begins with
- **Requester Name**: begins with

**Hold From Further Processing**: ☐

**Case Sensitive**: ☑

[Search] [Clear] [Basic Search] [Save Search Criteria]
Once you have searched for a requisition, click anywhere along the blue hyperlinked text in the Search Results line to view the requisition.

Click OK through this message, if it pops up.
3. You can also search for any requisition in **Requisition Inquiry** using this path on the NavBar:

**Purchasing -> Requisitions -> Review Requisition Information -> Requisitions.** Once your approving official views/approves your requisition, this will be the only place for you to view it.

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 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 desired updates to the chartfield on the Distributions screen. This only affects the chartfield for the selected line.

Use this icon to Personalize on this page to rearrange the order of the fields here. You’ll only need to do this once.
6. To split a line amount to two or more chartfields, first navigate to its Distributions (see 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, and specify the Percent.

If you would like to split by 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.

For example, split by assigning 50% to one chartfield and 50% to another

For example, split by assigning $4,000 to one chartfield and $1,000 to another

Note: If you are kicked out of this screen while making these changes, just go back in again through the Distribution icon to finish.