Overview

CFS allows on-line entry of requisitions by end-users. Line items and the appropriate Chart String information can be entered. Some end users will have the authority to approve requisitions depending on their security. Approval by a manager or supervisor may be required.

This guide will show you how to:

- Create and Modify Requisitions
- Print Requisitions
- Approve Requisition
1. Navigate to the CSUEB Staff Homepage.

2. Click the CFS Finance link under PeopleSoft CFS/Operations Login.

3. Select East Bay in the drop down menu to select our campus.

4. Use your Net ID and Password to login to the CSU Portal.
5. Click the CFS Production Log-in link on the right side of the screen.

6. Using the Main Menu header at the top of the page navigate to the Add/Update Requisitions screen by clicking on the following links:
   1. PURCHASING
   2. REQUISITIONS
   3. ADD/UPDATE REQUISITIONS

Click on the button.

7. Click on the magnifying glass Next to the Requester field.
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8. Your name should be in the list of Requesters. Click on your name to set it as the requester.

9. Click on the Requisition Default Link.

10. Under the default options select Override.

This is a very important step, if you select default the account code will default to 660003. You want to use the Override option if you wish to use a different account code.
11. Enter the default buyer, supplier, and category code. You can do so by clicking on the magnifying glass next to each field.

- **Buyer ID:** 05999999999
- **Vendor ID:** 0000009750
- **Category Code:** 00000
- **Unit of Measure:** EA

12. **Due Date:** Enter the date you would like the items to be received on campus.

**Ship To:** Receiving should automatically populate the field based on your default settings. If it does not, select Receiving by using the magnifying glass to the right of the field.

13. Enter the chartfield string you wish to set as the default. This will be applied to each line of the requisition. Click the OK button at the bottom of the screen to return to the maintain requisitions screen.
14. Click on the expansion icon to the right of the description field to access the description modal window.

15. Enter the description of the item you would like to purchase in the Description field. This field is limited to 254 characters only.

16. Enter the Quantity of goods you are requesting to purchase in the next field to the right.

17. Click the refresh button at the bottom of the page. You should see the UOM and Category fields auto-populate based on the information you entered earlier in the requisition defaults page.

18. Enter the unit price.
19. You now have enough information to save your requisition. Click the save button near the bottom of the page. The system will generate a requisition number after the save has been completed.

20. You should now see a Requisition ID number at the top of the page. WRITE IT DOWN.
21. Click on the **Add Comments** link.

22. Click on the **Use Standard Comments** link.

23. In the **Comment Type** field enter STD.

24. In the **Comment ID** field enter D&V and then click the refresh button. Click the OK button at the bottom of the page.
25. Enter additional information in the spaces provided.

26. Check all 3 boxes at the bottom of the screen:
   - Send to vendor
   - Show at Voucher
   - Show at receipt

   The information you enter on this screen will appear on the face page of the requisition.

!!Requisitions submitted without header comments information will be UNAPPROVED and returned to the requester to re-submit with the correct information listed!!

27. Next attach backup documents/quotes/specifications by clicking on the attach button.

28. In the pop-up window click the browse button to search for the file you want to attach. You should see the file name appear in the pop-up after you select it.

29. Click the upload button.
30. You should now see the file name in the Associated Document section. Next click the OK button at the bottom of the screen.

31. Click the save button at the bottom of the screen to save the comments you entered.

32. To add a second line to the requisition click on the + icon at the far right end of the first line. Repeat steps 14-18 for each new line you create. *Remember to save after each line.*
33. Place a checkmark at the Hold From Further Processing box in the upper right of the page.

34. Login to PeopleSoft Finance (steps 1-6 above)

Using the Main Menu header at the top of the page navigate to the Add/Update Requisitions screen by clicking on the following links:

- PURCHASING
- REQUISITIONS
- ADD/UPDATE REQUISITIONS

35. Click on the Find an Existing Value Tab

**Approving a Requisition.**

Only authorized approvers will have the ability to approve pending requisitions. In some cases the end user who entered the requisition will also have the authority to approve. If you do not have the authority to approve requisitions you will need to email the requisition number to your authorized approver and have them review the process outlined below for approving requisitions. You will need to forward the requisition ID number to your department’s approver for approval.
36. Enter the requisition ID number in the Requisition ID Field and click search.

37. On the maintain requisition page review the total amount of the requisition and then click on the requisition default link.

38. On the requisition defaults page double-check the chartfields to ensure they are correct. When finished click the OK button at the bottom of the screen.
39. Click the view printable version link at the bottom of the page.

40. The following message will appear stating you don’t have permission to run this option. No worries, that’s just one of many Peoplesoft glitches we will encounter during this tutorial. The printed requisition is processing in the background. Go ahead and click OK to clear the message.

You may want to print a hard copy of the requisition. If so, you will need to do so before approving the requisition.
42. On the process monitor page click the refresh button until the Run Status changes from Queued to Success and Distribution Status changes from N/A to Posted.

43. Next click on the Details link to the far right of the line.

44. On the following page click on the View Log/Trace link.

45. On the following page click on the .PDF link. (the middle link)
46. The PDF copy of the requisition will open automatically in Adobe Reader. Use CTRL+P to print the requisition.

Now that you printed a copy of the requisition let’s go back and approve it so it can be assigned to a buyer.

47. Click on the Favorites header at the top left of the page. Under Recently Used click on the Add/Update Requisitions link.
48. Click on the Find an Existing Value tab.

49. Once again enter the Requisition ID number in the Requisition ID field and click the search button.

50. On the Maintain requisitions page remove the checkmark from the Hold from Further Processing box and then click save.

51. Click the Green checkmark to approve the order. You will see the Status change from open to Approved. **DON'T SAVE!**
52. Once the requisition is approved you should receive the following notification.

*Your operator profile indicates that you do not have authority to change approved requisitions.*

The system is notifying you that an approved requisition and you no longer have access to make changes. End-users can only edit/modify "open" requisitions. Once the status has changed from "open" to "approved" only Procurement staff can make changes. If you need to make changes to a requisition after it has been approved please send an email to Purchasing@csueastbay.edu.