]¾Çe0
CALIFORNIA STATE

ess Pr G

rocess: e a New Re

le:

evel	
Process	
Module	Purchasing
Document	Business Process Guide
Revision	3

8/20/2016	Staff	First Version	23
3/01/2017	Chris Lam-Vazquez	Add “#reate a Future year Requisition” section	15
			22

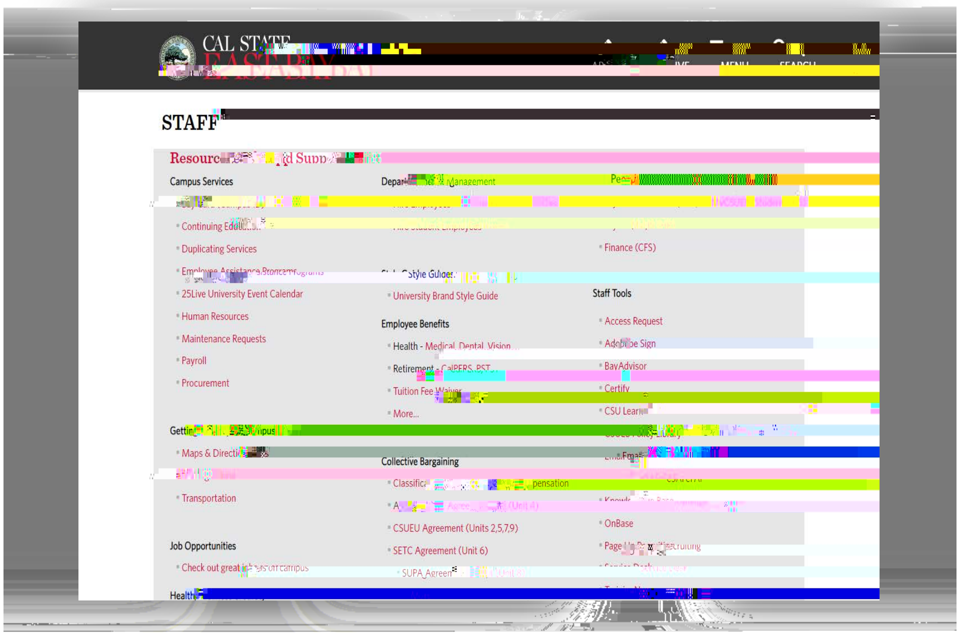
Index

The Purchasing Office is responsible for awarding all contracts and purchases made by the University. We issue Invitation for Bids/Quotes and Requests for Proposals which are processed into Purchase Orders and Contracts for different goods and services. A Requisition must be submitted to the Purchasing Department to request any goods or services via PeopleSoft CFS Finance.

A requisition is an internal document that is routed to Purchasing for the fulfillment of a request. A requisition may not be used as a formal document (i.e. University issued Purchase Order) to purchase goods and services.

The CFS System 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.

https://www.csueastbay.edu/procurement/purchasing/how-to-buy.html

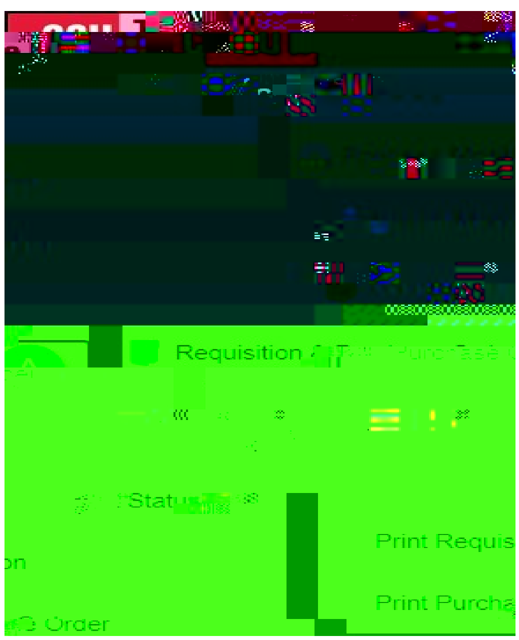

STAFF
Campus Services
Duplicating Services
25Live University Event Calendar
Human Resources
Maintenance Requests
Payroll
Procurement
Transportation
Job Opportunities
University Brand Style Guide
Employee Benefits
More...
Collective Bargaining
CSUEU Agreement (Units 2,5,7,9)
SETC Agreement (Unit 6)
Finance (CFS)
Staff Tools
Access Request
BayAdvisor
OnBase

A. Click on the CFS End User Tile

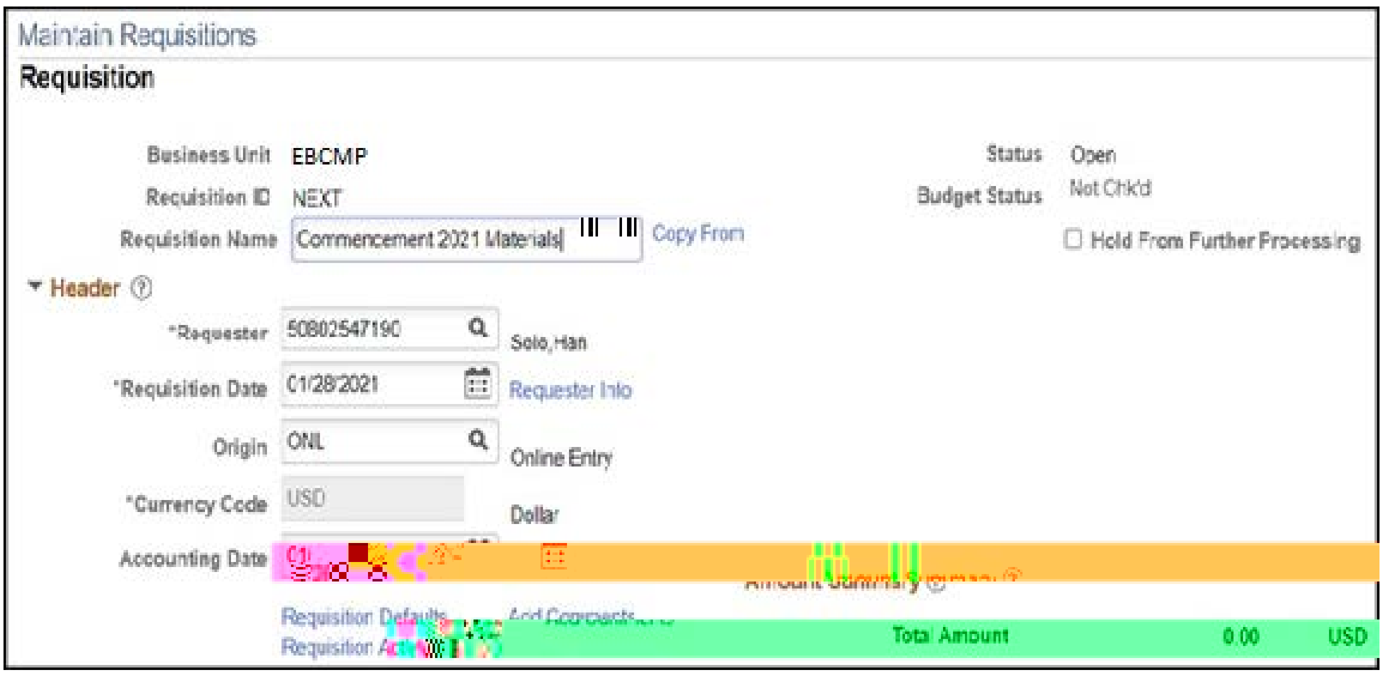
B. Or You can click on the NavBar icon to navigate to

NavBar --> Navigator --> Purchasing --> Requisitions --> Add/Update Requisitions

Requisitions.



The Requisition Header information will be automatically populated. View the table below to see definitions for each field and whether entry is required or optional.



Click on Q

Provide Procurement with additional required information

*Do not include if the TIN is a person's Social Security Number View information on

Adding/Editing Header Comments

Here is a sample of the details that needs to be filled

The requisition Header Comments page is also where documents are attached for use as a reference or for use by the Procurement Department.

Types of commonly provided information include:

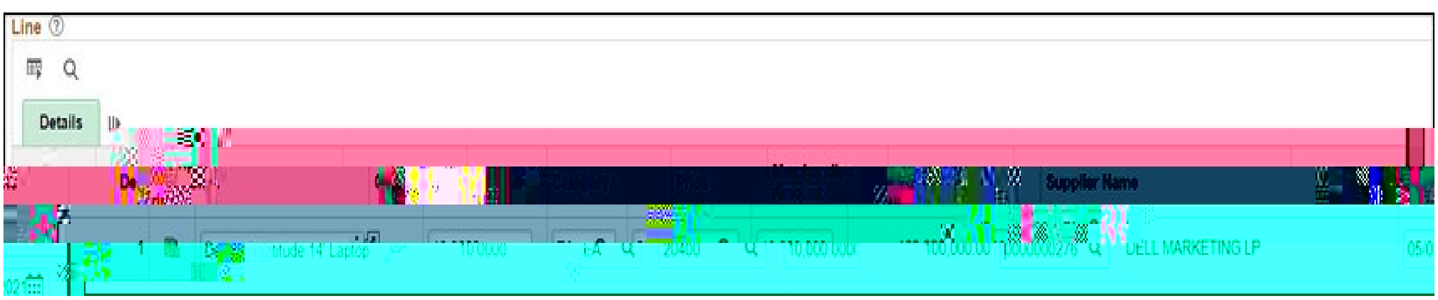
Supplier/Vendor quotes
Order attachments
Additional approval signatures
Other required documentation
Attach Quote/ Proposal

You can attach multiple files to your Requisition. Click the '+' icon to add more files to the Requisition.

Complete each requisition line (including line information, schedule information, and distribution information) before adding another line. As long as the requisition status remains open, you can make changes to any field you have entered.

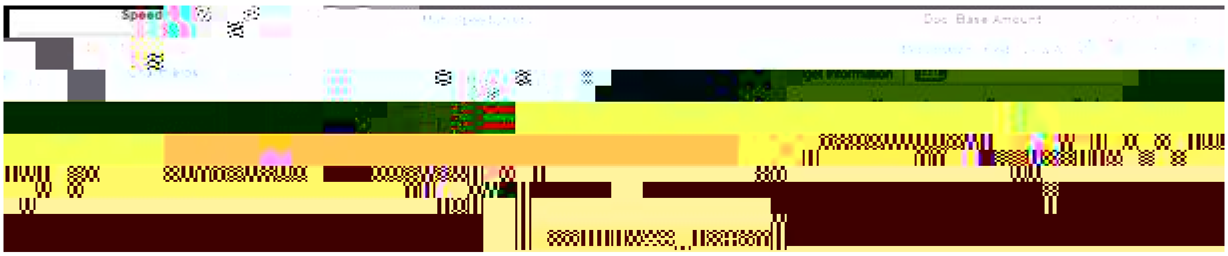
Did you enter Requisition Defaults? Fill out the Description and Quantity fields and then press the Refresh button at the bottom left of the screen. Your defaults will then be populated.

Are you seeing additional fields and tabs not shown in the screenshot above such as Item ID? Follow these instructions to remove these unused fields from your view. You will need to navigate away from this page, so you may need to re-enter the information on your Requisition.



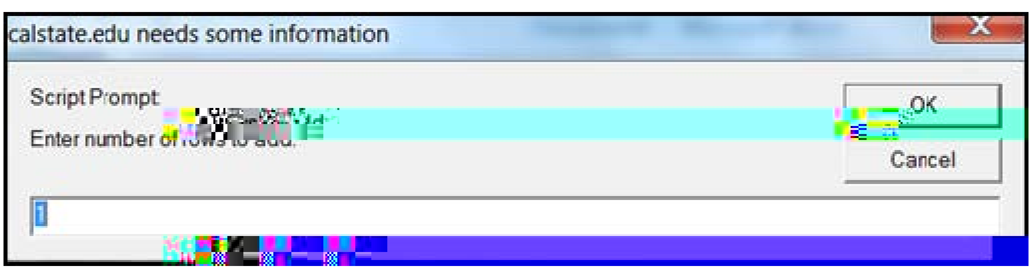
Note that you may see additional fields other than the ones in the screenshot below. Only the fields shown in the screenshot below are used at CSUEB. If you wish to hide the unused fields, you can click on the grid icon at the top left of the Distributions box, select Personalize, ¤ o E E ¤

Below will show the chart of accounts for the requisition.



To split the charges between two (2) or more chart of accounts, scroll to the right and select the "+" button.

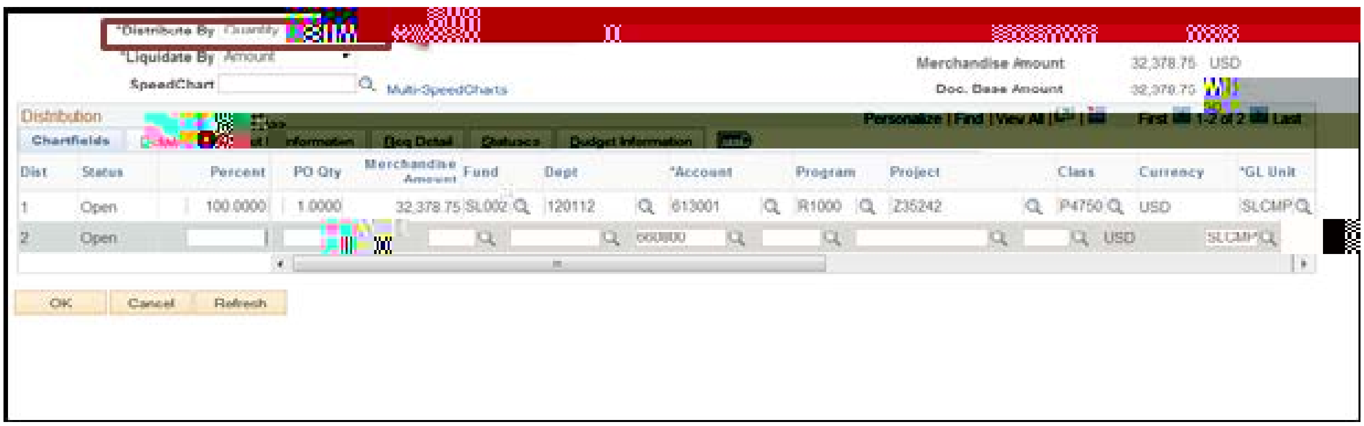
Enter the number of rows you would like to add. Check the "Ok" button.



The process for splitting the costs between two or more chartfields is the same. However, you have to first choose if you want to split by quantity (which is the default) or by amount.

Split by quantity example: You are purchasing 10 laptops. One chartfield will cover the cost of 5 laptops and a second chartfield will cover the cost of the other 5 laptops.

Split by amount example: You are purchasing 10 laptops. One chartfield will cover 75% of the cost of the 10 laptops and a second chartfield will cover the remaining 25%. Or one chartfield will contribute $500 towards the cost of the 10 laptops and the second chartfield will cover the remaining cost.



Once the information has been inputted, click the "Ok" button click the "Save" button.

Remember that you can't save your requisition until ALL blank rows are populated. It's recommended that you add just one row at a time: add one row, fill out the line item information, click Save, and then add another row.

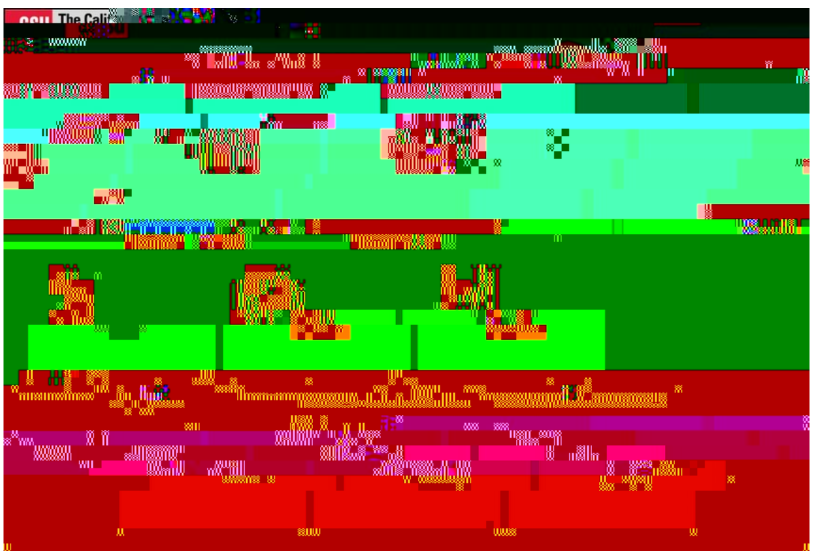
This way, if you are interrupted while filling out the requisition, you will only lose the one line item row you were working on if you are timed out after 20 minutes of inactivity

Approving a Requisition

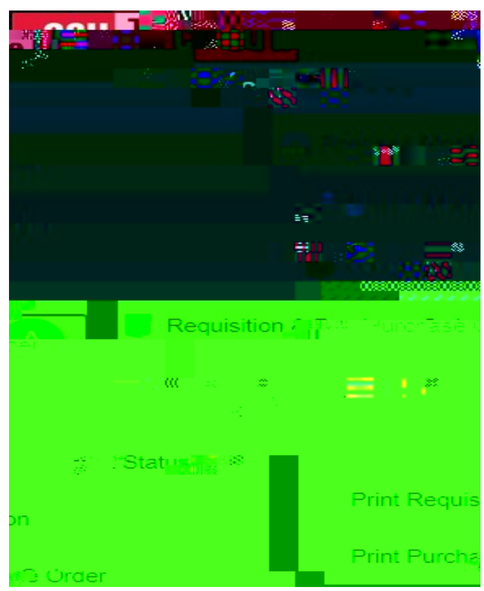
Only authorized approvers will have the ability to approve pending requisitions. In some cases the requester who entered the requisition will also have the authority to approve. If a requester does not have the authority to approve requisitions, the requester will need to email the requisition number to an authorized approver (within the Department) and have them review the process outlined in this section for approving requisitions.

Login to PeopleSoft Finance.

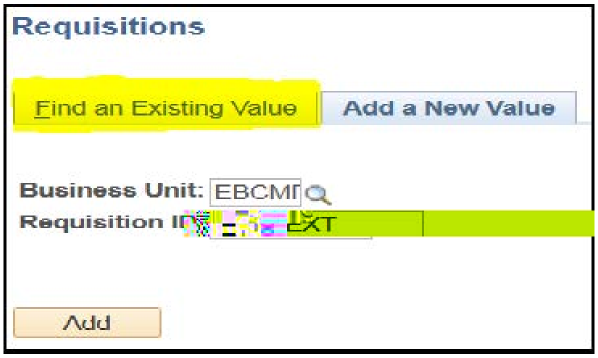
NavBar --> Navigator --> Purchasing --> Requisitions --> Add/Update Requisitions



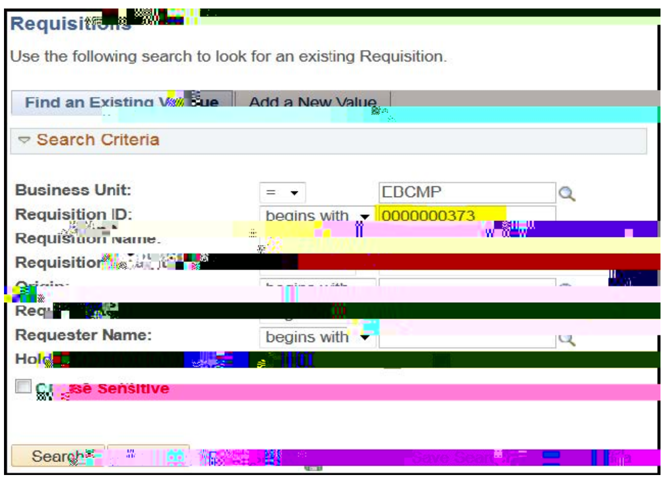
Requisitions.



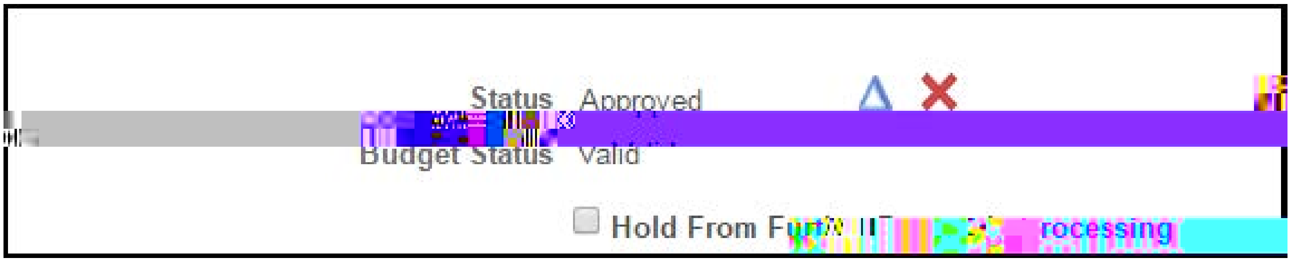
Click on the “Find an Existing Value” tab.



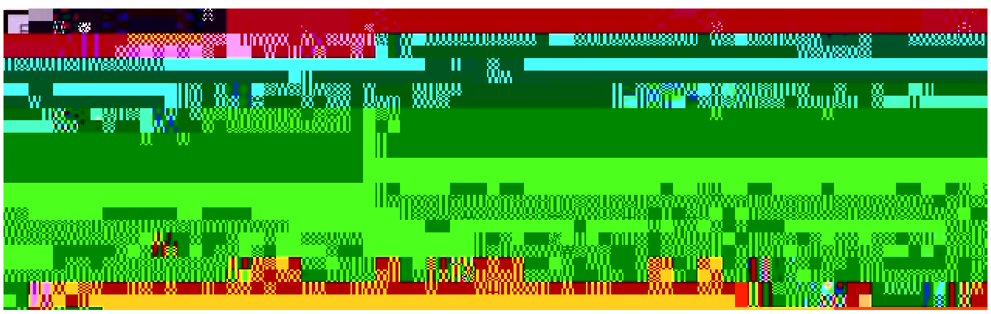
Enter the requisition number in the “Requisition ID” field and click the “Search” button.



Once the requisition is on screen, click the checkmark to approve the order. It is recommended that the requester print a copy of the requisition prior to approving for reference. The Status changes from “Open” to “Approved”



Once the requisition is approved, the requester should receive the following notification:



The above message is the system notifying the requester that the requisition has been approved and the requester no longer has access to make changes. Click the “Ok” button to advance forward.

The requester can only edit/modify “open” requisitions. Once the status has changed from “open” to “approved” only Procurement staff can make changes.

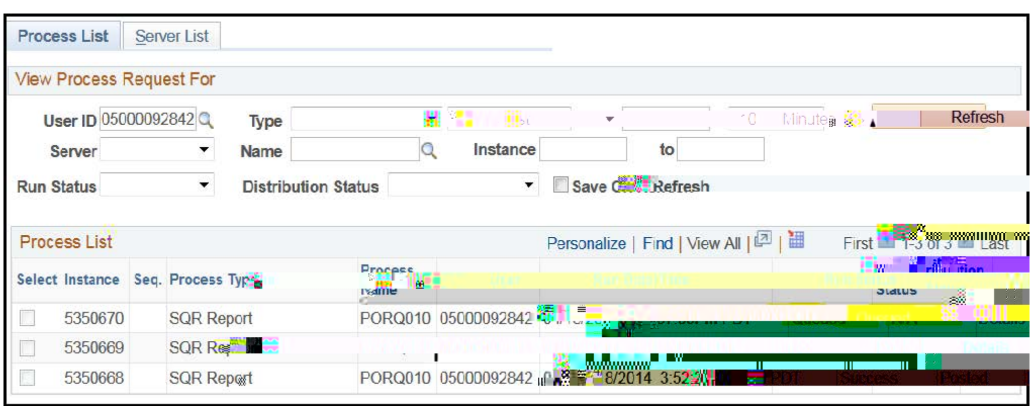
ess Pr G

rocess: e a New Re

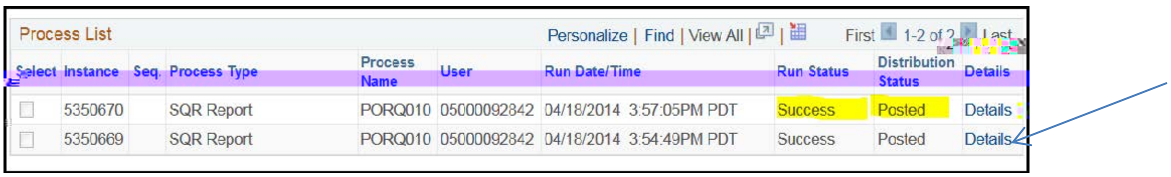
le:

Using the main menu header, navigate to the “Process Monitor” page.

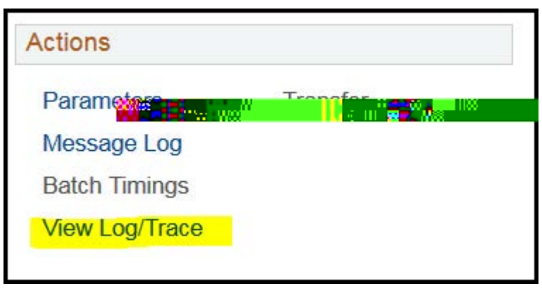
On the Process Monitor page, click the refresh button until the “Run Status” changes from “Queued” to “Success” and “Distribution Status” changes from “N/A” to “Posted.”



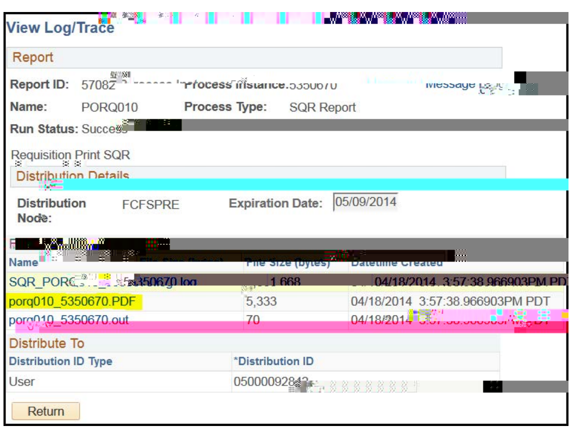
Next, click on the “Detail Link” to the far right of the line.



On the following page, click on the “View Log / Trace.”



On the following page, click on the PDF link.



The PDF copy of the requisition will open automatically; use "CRTL + P" to print the requisition.