

Requisition Creation Guide

Red boxes are steps
you should follow

Yellow boxes are
helpful notes

Purple boxes are tips
for advanced users



Opening CFS (PeopleSoft)

Section 1

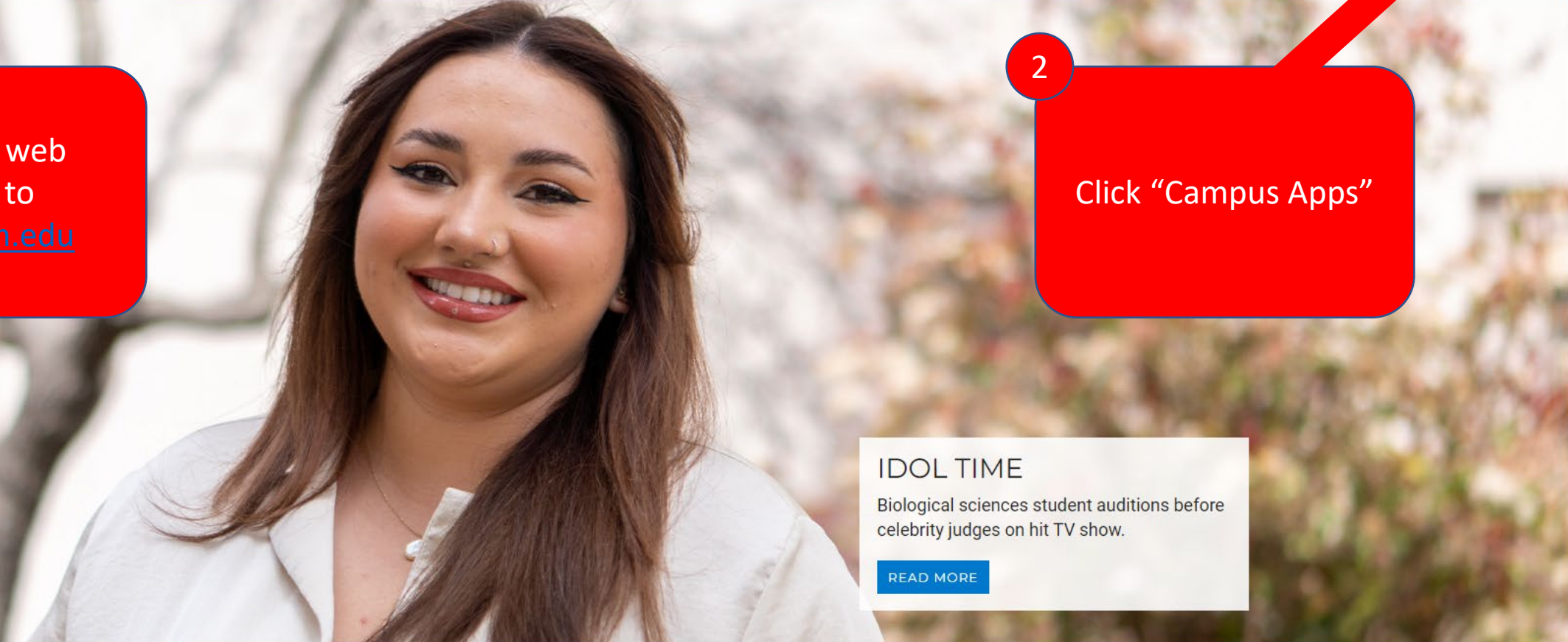


1

Navigate a web browser to www.csusm.edu

2

Click "Campus Apps"



IDOL TIME
 Biological sciences student auditions before celebrity judges on hit TV show.

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NEWS

[View campus news](#)



EVENTS

[View all events](#)

Thursday May 18
6:30 PM [Senior Experience Tradeshow](#)

[Ask CougarBot!](#)

CALIFORNIA STATE UNIVERSITY SAN MARCOS

- ABOUT
- ACADEMICS
- CAMPUS LIFE
- ADMISSIONS & AID
- GIVING
- RESOURCES

SEARCH | CAMPUS APPS

- myCSUSM
- COUGAR COURSES
- EMAIL
- OFFICE APPS
- PASSWORD MANAGEMENT

3
Click "myCSUSM"



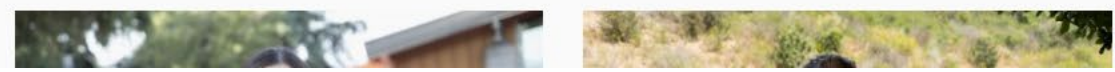
IDOL TIME

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6:30 PM [Senior Experience Tradeshow](#)

Hi there! I am CougarBot, your personal helper bot! What can I help with?

[Ask CougarBot!](#)

Sign in to myCSUSM

Username

Password

[Sign In](#)

[Trouble Logging In?](#)
Clear cache and cookies and restart your browser.

Login & Password Information

Use your network username and password. The same one used for campus email or Cougar Courses.
If you believe you are entering a correct password but getting an invalid username/password message
Please [click here to update or recover your password.](#)

Troubleshooting

Enable pop-ups for this site. If you are experiencing difficulties, visit [myCSUSM Help](#).

Maintenance Schedule

Tuesday nights 9PM - 12AM as needed.

Employee CSYou & CFS

Access CSYou Portal and the CSU Common Financial System (CFS) System.

[CSYou & CSU CFS Login](#)

4

Click the "CSYou & CSU CFS Login" button

If you haven't used this system recently, you will likely be prompted to select CSU San Marcos as your campus



Search this site

- EMPLOYEE RESOURCES
- TOOLS & SERVICES
- DIVISION & ORGANIZATIONS
- PROJECTS & INITIATIVES
- COLLABORATE
- POLICIES
- FORMS & PROCEDURES
- NEWS & INFORMATION

- HOME
- TOOLS & SERVICES
- FINANCIAL TOOLS
- COMMON FINANCIAL SYSTEM (CFS)

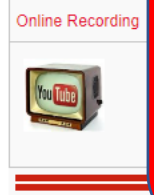
- Common Financial System (CFS)
- CFS Non-Production
- Financial Information Systems (FIS)
- CFS Login
- Finance Data Warehouse Login
- Finance DW Home Page
- Interagency Financial Transactions
- FS User Access Request
- Bank of CSU
- Wdesk

Common Financial System (CFS)

CFS PRODUCTION LOGIN

CFS 9.2 MP 3.0 - Fluid User Interface - Phase II

Tips to Get You Started with the New CFS Fluid User Interface
Beginning on 5/15/2023, CFS users will experience a brand new user interface. The CFS 9.2 Homepage will display the new interface. In addition, a new link will be added to the homepage for users to personally record their recording link CFS.



5

Click the "CFS Production Login" button

Systemwide Technical Support

Requests for assistance begin by contacting the ITSupport Center by [email](#) or by telephone (562) 951-8500.

Requests are routed to technology service providers 24 hours a day, 7 days a week, 365 days a year.

Open a Ticket

[Open a ticket using ServiceNow](#)

[List of year-end close impacting system outages](#)

CFS System Outages

Title	Distribution Date
Scheduled Outage: Production Outage for Elasticsearch - BLTN0002088 <small>NEW</small>	5/15/2023 10:45 AM
CFS Application Update <small>NEW</small>	5/15/2023 9:00 AM
Scheduled Outage: Production Outage for Elasticsearch - BLTN0002088	5/11/2023 2:31 PM

This is the best page to bookmark for accessing this system in the future!

Login to CSU CFS

Campus Username


Password

Login

[\[Forgot Your Password?\]](#)

[\[Need help? Contact IITS\]](#)

6
Enter your CSUSM
Username and
Password



Choose an authentication method

DUO Push Used automatically Send Me a Push

Call Me Call Me

Passcode Enter a Passcode

Secured by Duo Remember me for 24 hours

Pushed a login request to your device... Cancel

7

Complete the DUO prompt



Creating a New Requisition

Section 2

Homepage x +

cfs.calstate.edu/psc/FCFSPRD/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL?Page=PT_LANDINGPAGE&Action=U&LP=ERP.EMPLOYEE.DEFAULT_LP

Planner CORP Directory OneDrive CFS Staples FedEx Print Online ADP Wufoo US Bank Adobe Sign AdobeSign Forms T... CORP Gift Cards Other bookmarks

CSU The California State University COMMON FINANCIAL SYSTEM FCFSPRD

Menu Search in Menu

CFS 9.2 1 of 5

Accounts Payable 	Accounts Receivable 	Asset Management
Billing 	General Ledger 	Purchasing
CFS End User 	Finance Data Warehouse (PRD) 	CFS 9.2 Application Documents

8

Click "Purchasing"

Process Monitor

cfs.calstate.edu/psc/FCFSPRD/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TEMPLATE_ID%3aPTPPNAVCOL&scname=C...

Planner CORP Directory OneDrive CFS Staples FedEx Print Online ADP Wufoo US Bank Adobe Sign AdobeSign Forms T... CORP Gift Cards

CSU The California State University
COMMON FINANCIAL SYSTEM

FCFSPRD

< CFS 9.2 CFS Purchasing

New Window | Help | Personalize Page

Process Monitor

- Report Manager
- Query
- Requisitions**
- Review Requisition Info
- Purchase Orders
- Review Purchase Order Info
- Reports
- ProCard
- Procurement Contracts
- Supplier Information

Process List | Server List

View Process Request For

User ID: 68100263754 | Type: | Last: | 14 Days | Refresh

Server: | Name: | Instance From: | Instance To: | Clear

Run Status: | Distribution Status: | Save On Refresh | Report Manager | Reset

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribu Status
<input type="checkbox"/>	25321218		SQR Report	POPO005	68100263754	04/19/2023 1:16:58PM PDT	Success	Posted
<input type="checkbox"/>	25296870		PSJob	PODISP	68100263754	04/14/2023 5:26:05PM PDT	Success	Posted
<input type="checkbox"/>	25296868		Application Engine	FS_BP	68100263754	04/14/2023 5:25:26PM PDT	Success	Posted
<input type="checkbox"/>	25284084		SQR Report	POPO005	68100263754	04/13/2023 8:52:28AM PDT	Success	Posted
<input type="checkbox"/>	25284061		SQR Report	POPO005	68100263754	04/13/2023 8:49:24AM PDT	Success	Posted
<input type="checkbox"/>	25276396		Application Engine	FS_BP	68100263754	04/12/2023 9:44:44AM PDT	Success	Posted
<input type="checkbox"/>	25276379		Application Engine	FS_BP	68100263754	04/12/2023 9:43:42AM PDT	Success	Posted
<input type="checkbox"/>	25268598		Application Engine	PO_POREOPEN	68100263754	04/11/2023 11:17:19AM PDT	Success	Posted
<input type="checkbox"/>	25235341		SQR Report	CSUPO008	68100263754	04/06/2023 10:13:10AM PDT	Success	Posted

9

Click "Requisitions"

Tip: If you do not see the "Requisitions" folder or "Add/Update Requisitions" as options, you need to complete the "Identity Management Access Request" form on the CSUSM ITS website

Process Monitor

cfs.calstate.edu/psc/FCFSPRD/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TEMPLATE_ID%3aPTPPNAVCOL&scname=C...

Planner CORP Directory OneDrive CFS Staples FedEx Print Online ADP Wufoo US Bank Adobe Sign AdobeSign Forms T... CORP Gift Cards

CSU The California State University
COMMON FINANCIAL SYSTEM

FCFSPRD

< CFS 9.2 CFS Purchasing

New Window | Help | Personalize Page

Process Monitor

- Report Manager
- Query
- Requisitions
 - Add/Update Requisitions
 - Requisition Document Status
 - Requester's Workbench
 - Budget Check Requisition
 - Reopen Requisitions
- Review Requisition Info
- Purchase Orders
- Req to Chk Notification

Process List | Server List

View Process Request For

User ID: 68100263754 | Type: [] | Last: [] | 14 Days | Refresh

Server: [] | Name: [] | Instance From: [] | Instance To: [] | Clear

Run Status: [] | Distribution Status: [] | Save On Refresh | Report Manager | Reset

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribu Status
<input type="checkbox"/>	25321218		SQR Report	POPO005	68100263754	04/19/2023 1:16:58PM PDT	Success	Posted
<input type="checkbox"/>	25296870		PSJob	PODISP	68100263754	04/14/2023 5:26:05PM PDT	Success	Posted
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<input type="checkbox"/>	25276396		Application Engine	FS_BP	68100263754	04/12/2023 9:44:44AM PDT	Success	Posted
<input type="checkbox"/>	25276379		Application Engine	FS_BP	68100263754	04/12/2023 9:43:42AM PDT	Success	Posted
<input type="checkbox"/>	25268598		Application Engine	PO_POREOPEN	68100263754	04/11/2023 11:17:19AM PDT	Success	Posted
<input type="checkbox"/>	25235341		SQR Report	CSUPO008	68100263754	04/06/2023 10:13:10AM PDT	Success	Posted

10

Click "Add/Update Requisitions"

Tip: If you do not see the "Requisitions" folder or "Add/Update Requisitions" as options, you need to complete the "Identity Management Access Request" form on the CSUSM IITS website

Browser: Add/Update Requisitions | cfs.calstate.edu/psc/FCFSPRD/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TEMPLATE_ID%3aPTPPNAVCOL&scname=C...

CSU The California State University COMMON FINANCIAL SYSTEM

CFS 9.2 | CFS Purchasing

Process Monitor | Report Manager | Query | Requisitions | **Add/Update Requisitions** | Requisition Document Status | Budget Check Requisition | Reopen Requisitions | Review Requisition Info | Purchase Orders | Review Purchase Order Info | Reports | ProCard | Procurement Contracts | Supplier Information | Req to Chk Notification

Requisitions

Find an Existing Value | Add a New Value

*Business Unit: SMURS | *Requisition ID: NEXT

Add

Find an Existing Value | Add a New Value

12

Click "Add"

11

Make sure these say "SMURS" and "NEXT" for a new CORP Requisition

||

You can click this tab to give yourself more screen space



Line Details & Chartfield

Section 3

13

Enter a short name/title for this Requisition.

Examples:

“Dr. Brown Lab Supplies”

“Bus Transport to UCLA”

“Centrifuge for BioChem Lab”

“IC Tom Cruise”



17

If this Req is for Goods, enter 57800 *
If this Req is for Services, enter 96200



19

Click the Schedule button to proceed to entering Due Date and Chartfield



18

Enter the \$ amount this will cost. Do not include tax



14

Enter a short description of what is being purchased



15

Enter how many of this thing you are purchasing (usually 1)



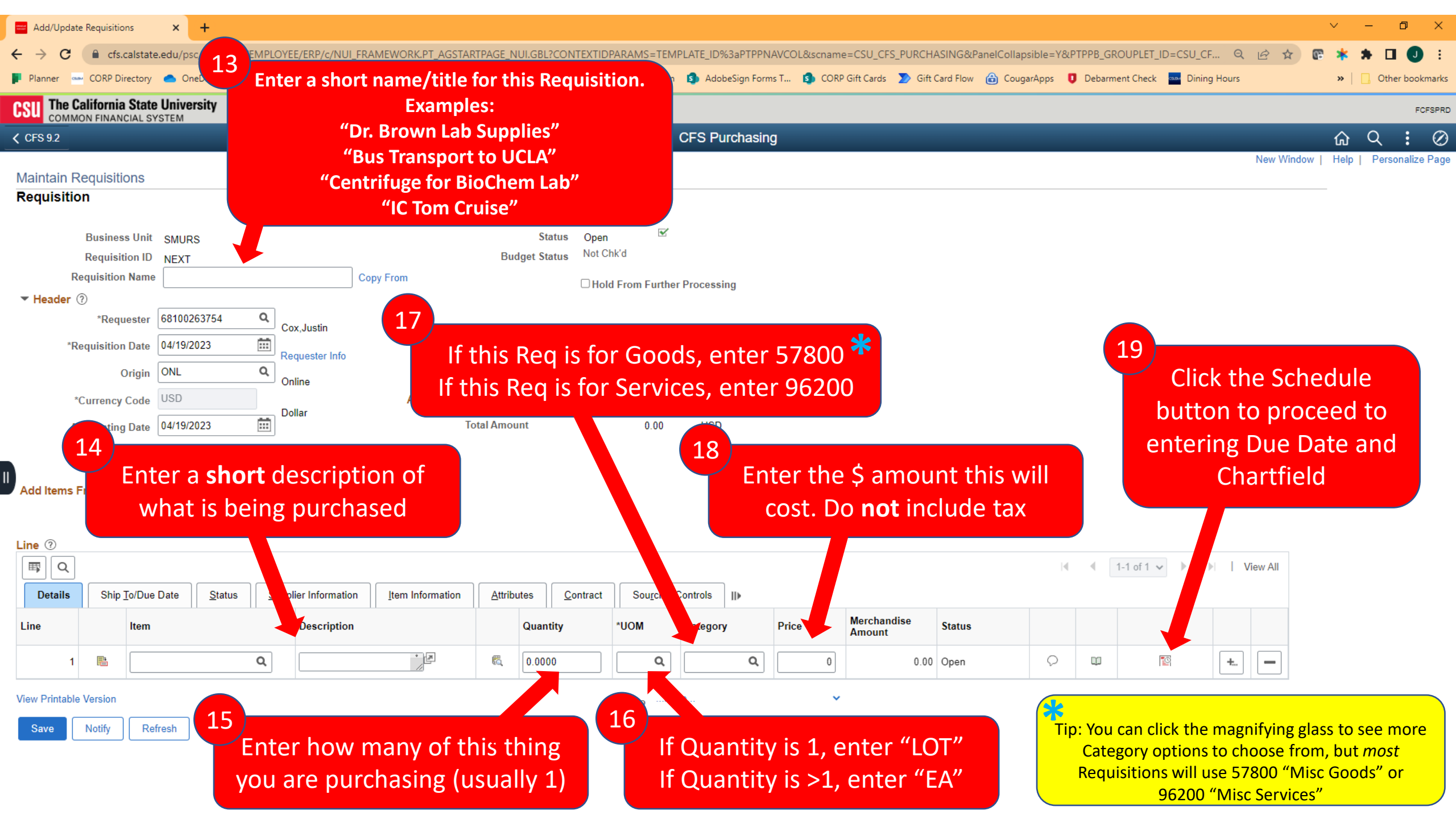
16

If Quantity is 1, enter “LOT”
If Quantity is >1, enter “EA”



*Tip:

You can click the magnifying glass to see more Category options to choose from, but most Requisitions will use 57800 “Misc Goods” or 96200 “Misc Services”



Maintain Requisitions
Schedule

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID NEXT Status Open
[Return to Main Page](#)

Line	Item	TEST DESCRIPTION	Quantity	1.0000	Batch Lot	Merchandise Amt	5.00	USD
Schedule								
Details								
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	
1	RECEIVIN	1.0000	5.00000	5.00		Cox,Justin	Active	

[Add Ship To Comments](#)
Save Notify Refresh

Add Update/Display

20 Enter a Due Date. This should be an estimated date when you expect to have fully received all Goods/Services AND we will have finished making payment.

21 Click the Distribution button to proceed to entering Chartfield

Maintain Requisitions Distribution

Requisition ID NEXT
Line 1
Schedule 1
Ship To RECEIVING Receiving
*Distribute By Quantity
*Liquidate By Amount
SpeedChart Multi-SpeedCharts

Item TEST DESCRIPTION
Status Active
Quantity 1.0000 LOT
Open Quantity 1.0000
Merchandise Amt 5.00 USD

Distributions

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Product	Project	Affiliation
1	Open	100.0000	1.0000	5.00	SMURS	613001									

OK Cancel Refresh

23 Click "Ok" to go back

22 Enter your Chartfield information:
Account – Fund – Dept – Project



Maintain Requisitions

Schedule

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID NEXT Status Open
[Return to Main Page](#)

Line	Item	TEST DESCRIPTION	Quantity	1.0000	Batch Lot	Merchandise Amt	5.00	USD
1								

Sched	Item	Quantity	Merchandise Amt	Attention To	Status
1	RECEIVIN	1.0000	5.00000	Cox,Justin	Active

24

Click "Return to Main Page" to go back

[Add Ship To Comments](#)
Save Notify Refresh Add Update/Display

Maintain Requisitions

Requisition

26 After you've hit "Save", a Requisition # will appear here. Make sure you write down this number!

Business Unit SMURS
Requisition ID NEXT
Requisition Name Copy From

▼ Header ⓘ
*Requester 68100263754 Cox,Justin
*Requisition Date 04/19/2023
Origin ONL Online
*Currency Code USD Dollar
Accounting Date 04/19/2023

Amount Summary ⓘ

Total Amount	5.00	USD
--------------	------	-----

Tip: From this point save as often as you like (and it's a good idea to save often!). The system will give you an error if you have not entered the Line Details and chartfield before you save.

Once you have saved you can exit and come back to continue working on this Req at any time

Add Items From ⓘ
Purchasing Kit Item Search
Catalog Requirer Items

Line ⓘ

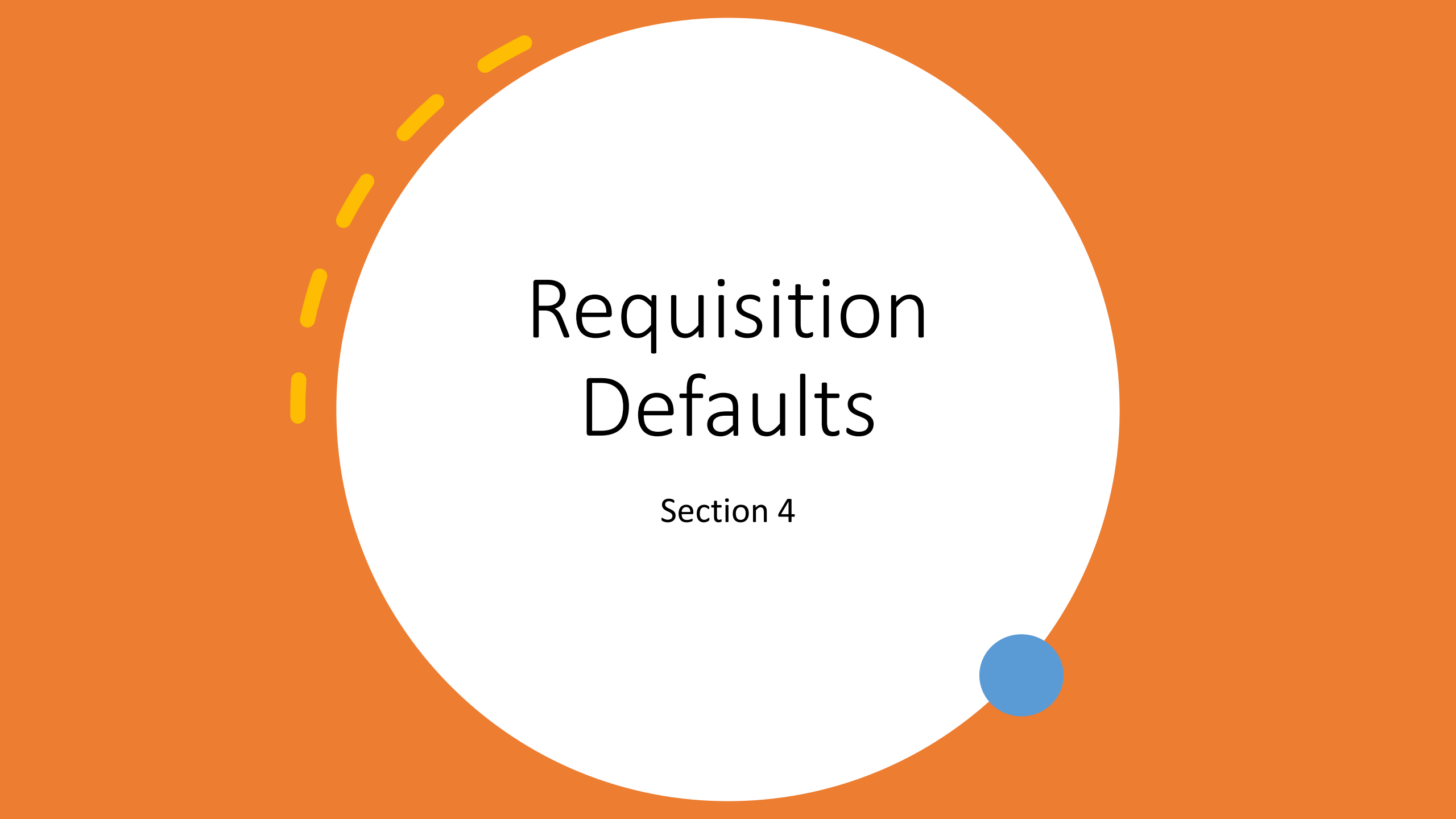
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Open

Pro Tip: **If you need multiple lines**, click the + button and then repeat steps 19 through 24 for each line. Occasionally, a requisition will need multiple lines (such as if you are using multiple chartfields, or if you have a quote which is broken down into multiple components).

25 Click "Save"

View Printable Version
Save Notify Refresh

Add Update/Display



Requisition Defaults

Section 4

Maintain Requisitions Requisition

Business Unit SMURS
Requisition ID 0000001885
Requisition Name 0000001885

Status Open
Budget Status Not Chk'd
 Hold From Further Processing

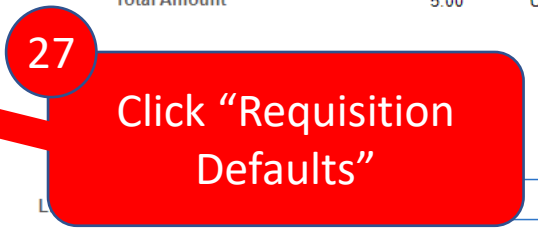
Header

*Requester 68100263754 Cox, Justin
*Requisition Date 04/19/2023
Origin ONL Online
*Currency Code USD Dollar
Accounting Date 04/19/2023

Amount Summary

Total Amount 5.00 USD

[Requisition Defaults](#)
[Requisition Activities](#)
[Document Status](#)



Add Items From

[Purchasing Kit Item Search](#)
[Catalog Requester Items](#)

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Open

[View Printable Version](#)

[Delete Requisition](#)

*Go to [...More...](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)

Requisition Defaults

Business Unit SMURS
Requisition ID 000001885
Requisition Date 04/19/2023

Default Options
 Default
 Override

If you select this option, the default values entered on this page are treated as defaults and applied if no other default values are found for each field. If default values are found and the values on this page are not used.

If you select this option, all default values entered on this page are overridden. Only non-blank values are assigned.

Line

Buyer

Supplier

Category

Schedule

Ship To RECEIVING Receiving

Due Date

Ultimate Use Code

Attention To

Distribution

SpeedChart

Distributions

Dist	Percent	GL Unit	Account	Fund	Dept	Project	Class	Program	Oper Unit	Bud Ref	Product	Affiliate	Fund Affil	Oper Unit Affil
1	<input type="text"/>	SMURS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

28

If you know the Supplier# for your Supplier, enter the Supplier# here. If you don't know the Supplier#, click the magnifying glass and see Steps 22-24

Tip: All requisitions require the vendor's Supplier ID, issued in the campus Procurement System. If this vendor is new, complete Form 204 Payee Data Record. See the CSUSM Corporation Procurement site for details.

SetID SMCMP
Supplier ID begins with

Short Supplier Name begins with

Basic Lookup

29
Type the *first few letters* of the supplier's name in the "Short Supplier Name" field (don't use spaces)

Search Results

View 100 1-3 of 3

Supplier ID	Short Supplier Name	Supplier	Additional Name	Our Customer Number	Old Supplier ID
0000006868	SANMARCOSG-002	LAMER I	(blank)	(blank)	(blank)
0000000561	SANMARCOST-001	SHERLENE PINCELLI DBA SAN MARCOS TROPHY	(blank)	(blank)	@00017541
0000000027	SANMARCOSU-001	SAN MARCOS UNIFIED SCHOOL DISTRICT	(blank)	(blank)	@00000351

30
Click "Search"

31
Click on the correct supplier in the search results

Tip: Some suppliers are expired or under "DBA" names. If you are struggling to find a Supplier that you feel should be in the system, reach out to CSUSM Corporation for assistance.

Requisition Defaults

Business Unit SMURS
Requisition ID 0000001885
Requisition Date 04/19/2023
Status Open

Default Options

- Default
If you select this option, the default values entered on this page are treated as part of the defaulting logic and are applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used and the values on this page are not used.
- Override
If you select this option, all default values entered on this page override the default values found in the defaulting logic. Only non-blank values are assigned.

The Supplier you selected on the previous screen will show up here

Line

Buyer

Supplier 0000000027 SAN MARCOS UNIFIED SCHOOL DISTRICT

Supplier Location MAIN

Category

[Supplier Lookup](#)

Schedule

Ship To RECEIVING Receiving

Due Date

Ultimate Use Code

Attention To

*Distribute By Quantity

*Liquidate By Amount

Ship Via BESTMETHOD

Freight Terms FOB

Tip: Only the Supplier field **MUST** be filled. This page has many fields that we don't use or are optional.

Distribution

SpeedChart

Distributions

Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Project	Class	Program	Oper Unit	Bud Ref	Product	Affiliate	Fund Affil	Oper Unit Affil
1	<input type="text"/>	SMURS <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

Requisition Defaults

Business Unit SMURS
Requisition ID 000001885
Requisition Date 04/19/2023
Status Open

Default Options ?
 Default
If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
only non-blank values are assigned.

Line
Buyer []
Supplier 0000000027 SAN MARCOS UNIFIED SCHOOL DISTRICT
Category []
Unit of Measure []
Supplier Location MAIN

Schedule
Ship To RECEIVING Receiving
Due Date []
Ultimate Use Code []
Attention To []
Distribute By Quantity
*Liquidate By Amount
Ship Via BESTMETHOD
Freight To []

Distribution
SpeedChart []

Distributions

Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Project	Class	Program	Oper Unit	Bud Ref	Product	Affiliate	Fund Affil	Oper Unit Affil
1	[]	SMURS	[]	[]	[]	[]	[]	[]	[]	[]	[]	[]	[]	[]

OK Cancel Refresh

Advanced Technique for Reqs with Multiple Lines:

If you Req has multiple Lines, you have the option to enter the Line Details/chartfield on this screen as the Defaults to save time. If doing this, be sure to check the "Override" bubble. You should do this screen BEFORE creating the lines (see Slide 11) for your new defaults to reliably apply. For simple Requisitions, it is safer to skip this portion and instead follow Steps 7 through 17 to enter the info directly on the Line

Most users can skip this slide

Requisition Defaults

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 0000001885 Status Open

Default Options ?

- Default
If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.
- Override
If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer Unit of Measure
Supplier 0000000027 SAN MARCOS UNIFIED SCHOOL DISTRICT Supplier Location MAIN
Category [Supplier Lookup](#)

Schedule

Ship To RECEIVING Receiving *Distribute By Quantity
Due Date *Liquidate By Amount
Ultimate Use Code Ship Via BESTMETHOD
Attention To Freight Terms FOB

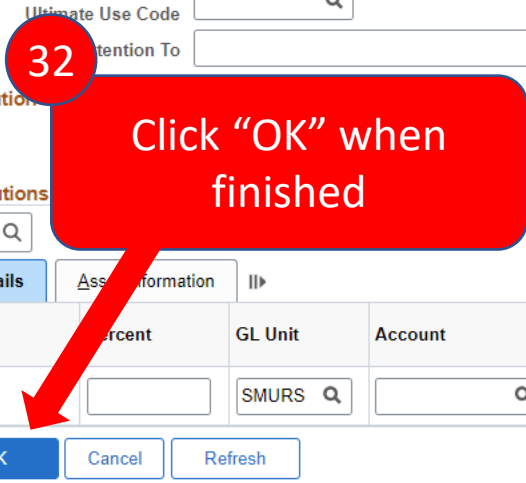
Distributions

Distributions

Dist	Percent	GL Unit	Account	Fund	Dept	Project	Class	Program	Oper Unit	Bud Ref	Product	Affiliate	Fund Affil	Oper Unit Affil
1	<input type="text"/>	SMURS <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

32

Click "OK" when finished



OK Cancel Refresh

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 0000001885 Status Approved
For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
Select 'Apply to All Distributions' to apply changes to all distribution lines on the requisition.
 Mark All Unmark All

33 Check the "Apply" checkbox for any fields that you made changes to (probably only the Supplier field)

Retrofit Field Selection

Apply	Distrib Line	Field	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Supplier	0000000027	
<input type="checkbox"/>		Supplier Location	MAIN	
<input type="checkbox"/>	1	GL Unit	SMURS	<input type="checkbox"/>

34 Click "OK" when finished

If you used the Defaults screen to edit chartfield info, make sure to check the checkbox for all details that you want applied to all Lines

OK Cancel Refresh



Requisition Comments

Section 5

Maintain Requisitions Requisition

Business Unit SMURS
Requisition ID 0000001885
Requisition Name 0000001885

Header

*Requester 68100263754 Cox, Justin
*Requisition Date 04/19/2023
Origin ONL Online
*Currency Code USD Dollar
Accounting Date 04/19/2023

Status Open
Budget Status Not Chk'd
 Hold From Further Processing

Amount Summary
Total Amount 5.00 USD

Requisition Defaults
Requisition Activities
Document Status
[Add Comments](#)

35

Click "Add Comments"

Add Items From
Purchasing Kit Item Search
Catalog Requester Items
Select Lines To
Search for Lines
Line To

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Open

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 0000001885 Status Open

Retrieve Active Comments Only
*Sort Method *Sort Sequence

Comments | 1 of 1 | View All

Use Standard Comments Comment Status Active

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Email

From -> REQ SMURS-0000001885

36

Click "Use Standard Comments"

Tip: In the interest of making the Req/PO process more efficient, we are requiring **all Requisitions** to use the Standard Comments. There are instructions in the comments to help you.

Standard Comments

Comments

*Action: Copy Comment

Comment Type: STD

*Effective Date: 04/20/2023

Description:

Short Desc:

Comments:

Comment ID: SERV

*Status: Active

OK Cancel Refresh

37 In the Comment Type field enter "STD"

38 In the Comment ID field
If this Req is for GOODS, enter "GDS"
If this Req is for SERVICES, enter "SERV"
If this Req is for TECHNOLOGY, enter "IT"
If this Req is for INDEPENDENT CONTRACTOR, enter "IC"

39 Click "OK"

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 000001885 Status Open

Retrieve Active Comments Only
*Sort Method *Sort Sequence

Comments [Search] | 1 of 1 | View All

Use Standard Comments Comment Status Active +

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvcesandfinance/corpprourement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment	Attach	View	Delete	Email
	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/>

ProTip: click the popout button to view the entire comment in a window.

40 Read the instructions in the Standard Comment and fill in any info required

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 0000001885 Status Open

Retrieve Active Comments Only
*Sort Method *Sort Sequence

Comments | 1 of 1 | View All

Use Standard Comments Comment Status Active

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvcesandfinance/corpprocurement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email
------------	---------------------------------------	-------------------------------------	---------------------------------------	--------------------------------

41

Every requisition shall have at least one attachment (a quote or proposal), and some will have more. To attach a file, click the "Attach" button.

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 000001885 Status Open

Retrieve Active Comments Only

*Sort Method *Sort Sequence

Comments | 1 of 1 | View All

Use Standard Comments Comment Status Active

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvcesandfinance/corpprourement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment	Attach	View	Delete	Email
	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="button" value="Email"/>

File Attachment

42

Click "Choose File"

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 000001885 Status Open

Retrieve Active Comments Only

*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments

Use Standard Comments Comment Status Active

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy and attached to this requisition. See the following link to share insurance requirements. <https://www.csusm.edu/corp/businesssvcsandfinance/corpprocurement/corpinsrequirement>

Delete this line and up if conditions are met, enter the following info and press OK.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment

Open

This PC > Documents

Organize New folder

Name	Date modified	Type	Size
Numbers Cheat Sheet	7/20/2016 8:36 AM	Microsoft Word D...	
Office Supply Budget Tracker DRAFT	6/8/2016 4:22 PM	Microsoft Excel W...	
Office Supply Budget Tracker DRAFT1	6/8/2016 4:23 PM	Microsoft Excel W...	
Payroll Process - DRAFT	10/23/2017 8:37 AM	Microsoft Word D...	
PUSD Direct pay Request - Summer Writi...	6/13/2016 1:34 PM	Microsoft Word D...	
RBHS Direct pay Request	7/26/2016 10:46 AM	Microsoft Word D...	
Red Tail Catering Quote - Meeting of the ...	8/2/2016 3:56 PM	Microsoft Excel W...	
Requisition Backup Documents	4/20/2023 3:16 PM	Microsoft Word D...	
Requisition Backup Documents	4/20/2023 3:16 PM	Adobe Acrobat D...	
securedoc_20180221T155125	2/21/2018 8:38 AM	Chrome HTML Do...	
SMFND Deficit Balance Report 5.17.16	5/17/2016 3:59 PM	Microsoft Excel W...	
Starbucks_SM	7/1/2016 12:01 PM	Microsoft Word 9...	
UARSC Central Routing List	6/6/2016 3:47 PM	Microsoft Word D...	
UARSC Closed 7.13.16	7/13/2016 8:17 AM	Microsoft Word D...	
UARSC Closed 7.13.16	7/13/2016 8:17 AM	Adobe Acrobat D...	
UARSC Closed 8.16.16	8/16/2016 11:09 AM	Adobe Acrobat D...	
UARSC Closed 8.24.16	8/24/2016 5:36 PM	Adobe Acrobat D...	
UARSC Closed 9.20.16	9/20/2016 5:09 PM	Adobe Acrobat D...	
UARSC Closed Sign	6/1/2016 11:26 AM	Adobe Acrobat D...	
UARSC Deficit Balance Report 5.17.16	5/17/2016 3:46 PM	Microsoft Excel W...	
UARSC Outreach Soda Delivery	5/17/2016 10:46 AM	Microsoft PowerP...	
UARSC Phone Lists	5/9/2016 12:05 PM	Microsoft Excel 97...	
Universal Deposit Form 2014	5/13/2016 2:10 PM	Adobe Acrobat D...	

File name: Requisition Backup Documents

All Files

43 Select the file you want to attach

44 Click "Open"

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 000001885 Status Open

Retrieve Active Comments Only

*Sort Method *Sort Sequence

Comments | 1 of 1 | View All

Use Standard Comments Comment Status Active

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssrvcesandfinance/corpprourement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment

File Attachment [X]

Requisition Backup Documents.pdf

45

Click "Upload"

Tip: Multiple Attachments - Each comment can only attach 1 file. If you need to attach more files, simply use the + button to add a new comment and use the arrows to move between comments, repeating Steps 41-45 to attach a file to each comment as needed.

Header Comments

Business Unit SMURS Requisition Date 04/19/2023
Requisition ID 0000001885 Status Open

Retrieve Active Comments Only
*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments 1 of 2

Use Standard Comments Comment Status Active

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvcesandfinance/corpprourement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment	Requisition_Backup_Documents.pdf	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email
------------	----------------------------------	---------------------------------------	-------------------------------------	---------------------------------------	--------------------------------

From -> REQ SMURS-0000001885

46
When all files are attached, click "OK" to return to the main page



Approve & Budget Check Requisition

Section 6

Maintain Requisitions
Requisition

Business Unit SMURS
 Requisition ID 0000001885
 Requisition Name 0000001885

Header ⓘ

*Requester 68100263754 Cox, Justin
 *Requisition Date 04/19/2023
 Origin ONL Online
 *Currency Code USD Dollar
 Accounting Date 04/19/2023

Status Open
 Budget Status Not Chk'd
 Hold From Further Processing

Amount Summary ⓘ

Total Amount	5.00	USD
--------------	------	-----

Tip: To save and come back, if you are still working on the requisition, check the "Hold From Further Processing" box so CORP Admin knows it is not complete.

Requisition Defaults
 Requisition Activities
 Document Status
 Edit Comments

Add Items From ⓘ

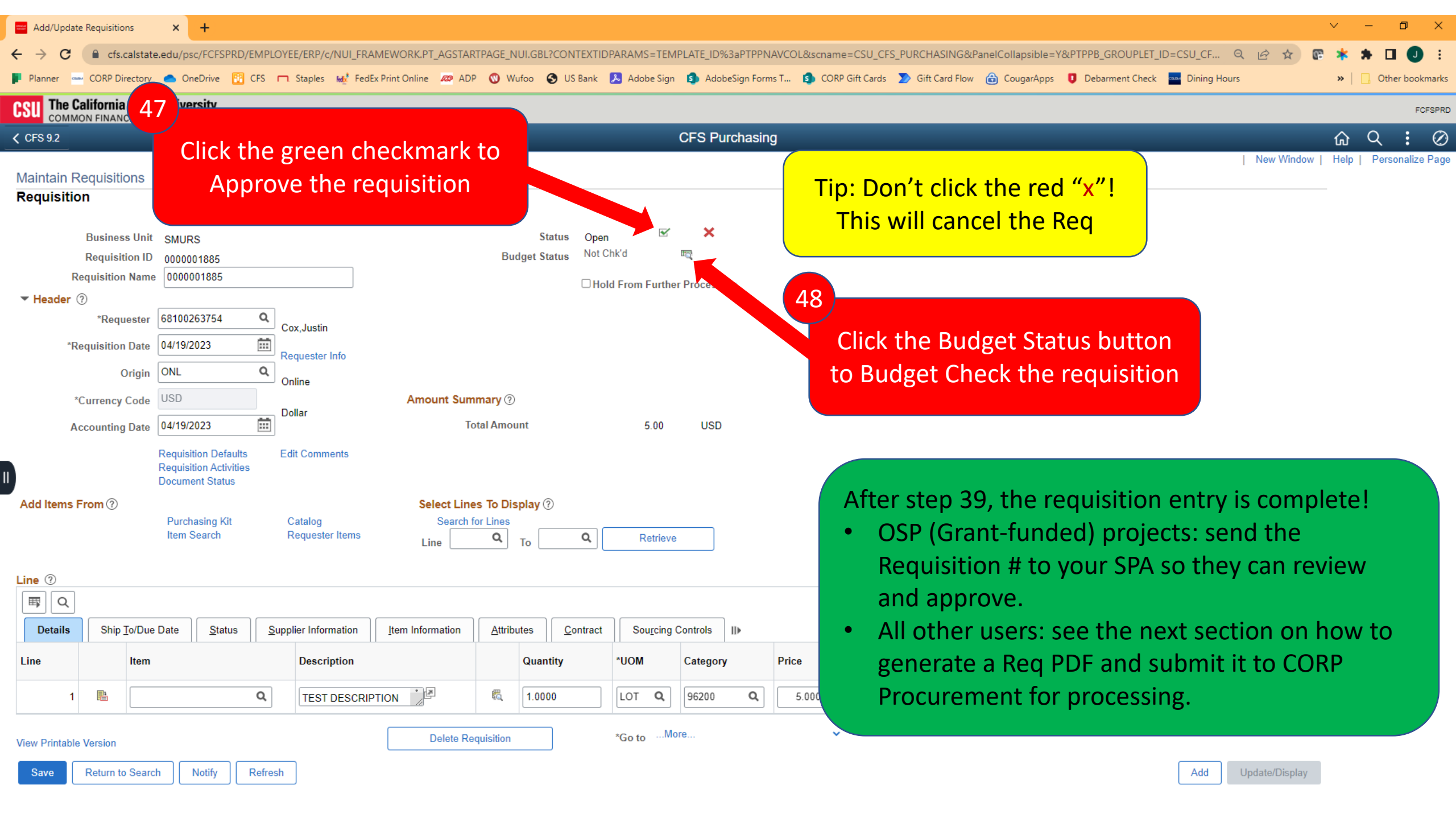
Purchasing Kit Item Search
 Catalog Requester Items

Select Lines To Display ⓘ

Search for Lines
 Line [] To [] Retrieve

Line ⓘ

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	[]	TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Open



47

Click the green checkmark to Approve the requisition

Tip: Don't click the red "x"! This will cancel the Req

48

Click the Budget Status button to Budget Check the requisition

After step 39, the requisition entry is complete!

- OSP (Grant-funded) projects: send the Requisition # to your SPA so they can review and approve.
- All other users: see the next section on how to generate a Req PDF and submit it to CORP Procurement for processing.



Generate Requisition PDF

Section 7

Business Unit SMURS
Requisition ID 0000001885
Requisition Name 0000001885

Header ?
*Requester 68100263754 Cox, Justin
*Requisition Date 04/19/2023
Origin ONL Online
Currency Code USD Dollar
Accounting Date 04/19/2023

Status Approved
Budget Status Valid
 Hold From Further Processing

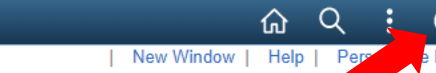
Amount Summary ?

Total Amount	5.00	USD
Pre-Encumbrance Balance	5.00	USD

Add Items From ?
Purchasing Kit Item Search
Catalog Requester Items

Select Lines To Display ?
Search for Lines
Line To Retrieve

49
Click the round Compass icon to open the NavBar



Line ?

1-1 of 1 | View All

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	<input type="text"/>	TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Approved				+..	-

Business Unit SMURS
Requisition ID 0000001885
Requisition Name 0000001885
Status Approved
Budget Status Valid
 Hold From Further Processing

Header
*Requester 68100263754 Cox, Justin
*Requisition Date 04/19/2023
Origin ONL Online
Currency Code USD Dollar
Accounting Date 04/19/2023
Requisition Defaults
Requisition Activities
Document Status

Amount Summary

Total Amount	5.00	USD
Pre-Encumbrance Balance	5.00	USD

Add Items From
Purchasing Kit Item Search
Catalog Requester Items
Select Lines To Display
Search for Lines
Line To Retrieve

Line
Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1		TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Approved				

50
Click the Menu button to open the navigation pane

NavBar
Menu
Recently Visited
Favorites
My Preferences

Maintain Requisitions
Requisition

Business Unit SMURS Status Approved
Requisition ID 0000001885 Budget Status Valid
Requisition Name 0000001885
 Hold From Further Processing

Header
*Requester 68100263754 Cox, Justin
*Requisition Date 04/19/2023
Origin ONL Online
Currency Code USD Dollar
Accounting Date 04/19/2023
Amount Summary
Total Amount 5.00 USD
Pre-Encumbrance Balance 5.00 USD

Add Items From
Purchasing Kit Item Search
Catalog Requester Items
Select Lines To Display
Search for Lines
Line To

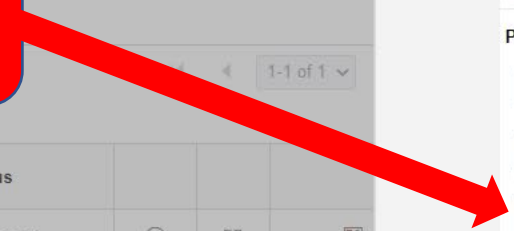
Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Approved

NavBar: Menu

- Menu
- Recently Visited
- Favorites
- My Preferences
- O Order Management
- O Order Sheet Processes
- P PeopleTools
- P Procurement Contracts
- P Purchasing
- R Reporting Tools
- S

51
Scroll down and click on the "Purchasing" folder



Maintain Requisitions

Requisition

Business Unit SMURS
Requisition ID 0000001885
Requisition Name 0000001885

Status Approved
Budget Status Valid
 Hold From Further Processing

Header

*Requester 68100263754 Cox, Justin
*Requisition Date 04/19/2023
Origin ONL Online
Currency Code USD Dollar
Accounting Date 04/19/2023

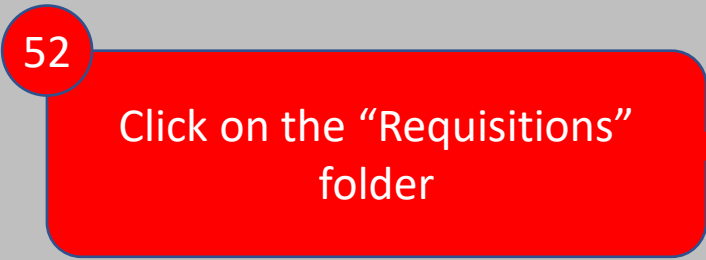
Requisition Defaults
Requisition Activities
Document Status
Edit Comments

Amount Summary

Total Amount
Pre-Encumbrance
Balance

Select Lines To Display

Search for Lines
Line To Retrieve



- Menu
- Recently Visited
- Favorites
- Purchasing
 - Analyze Procurement
 - CSU Req to Check Notification
 - Purchase Orders
 - Receipts
 - Request for Quotes
 - Requisitions
 - Return To Vendor / Supplier

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Approved

View Printable Version

*Go to More...

Save Return to Search Notify Refresh

CSU The California State University COMMON FINANCIAL SYSTEM

CFS Purchasing

Maintain Requisitions

Requisition

Business Unit: SMURS Status: Approved ✘
Requisition ID: 0000001885 Budget Status: Valid
Requisition Name: 0000001885 Hold From Further Processing

Header ⓘ

*Requester: 68100263754 Cox, Justin
*Requisition Date: 04/19/2023 Requester Info
Origin: ONL Online
Currency Code: USD Dollar
Accounting Date: 04/19/2023

Requisition Defaults Edit Comments
Requisition Activities
Document Status

Amount Summary

Total Amount	5.00	USD
Pre-Encumbrance Balance	5.00	USD

Select Lines To Display ⓘ
Search for Lines
Line To

Line ⓘ

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text"/>	TEST DESCRIPTION	<input type="text" value="1.0000"/>	LOT <input type="text"/>	96200 <input type="text"/>	5.00000	5.00	Approved			

View Printable Version *Go to ...More...

NavBar: Menu

Menu > Purchasing

Requisitions

- Add/Update Requisitions
- Approve Amounts Req
- Budget Check Requisition
- Entry Event Request Req
- Load Requisitions
- Purge Load Requests
- Reconcile Requisitions >
- Reports >
- Requester's Workbench
- Review Requisition Information >
- Stage PCard for Loading
- Update Direct Shipments

53

Click on the "Reports" folder

Maintain Requisitions
Requisition

Business Unit: SMURS
Requisition ID: 0000001885
Requisition Name: 0000001885
Status: Valid
Budget Status: Valid



Header
*Requester: 68100263754 Cox, Justin
*Requisition Date: 04/19/2023
Origin: ONL Online
Currency Code: USD Dollar
Accounting Date: 04/19/2023

Amount Summary

Total Amount	5.00	USD
Pre-Encumbrance Balance	5.00	USD

Select Lines To Display
Search for Lines
Line: [] To: [] Retrieve

Line
1-1 of 1

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		TEST DESCRIPTION	1.0000	LOT	96200	5.00000	5.00	Approved

View Printable Version *Go to More...

Buttons: Save, Return to Search, Notify, Refresh

Reports

- PO/Requisition Xref
- Print Requisition
- Req & PO Budget Activity Req
- Requisition Template

Favorites
My Preferences

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Run Control ID begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

55
Leave the search bar (Run Control ID) empty and click "Search"

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Run Control ID begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Search Results

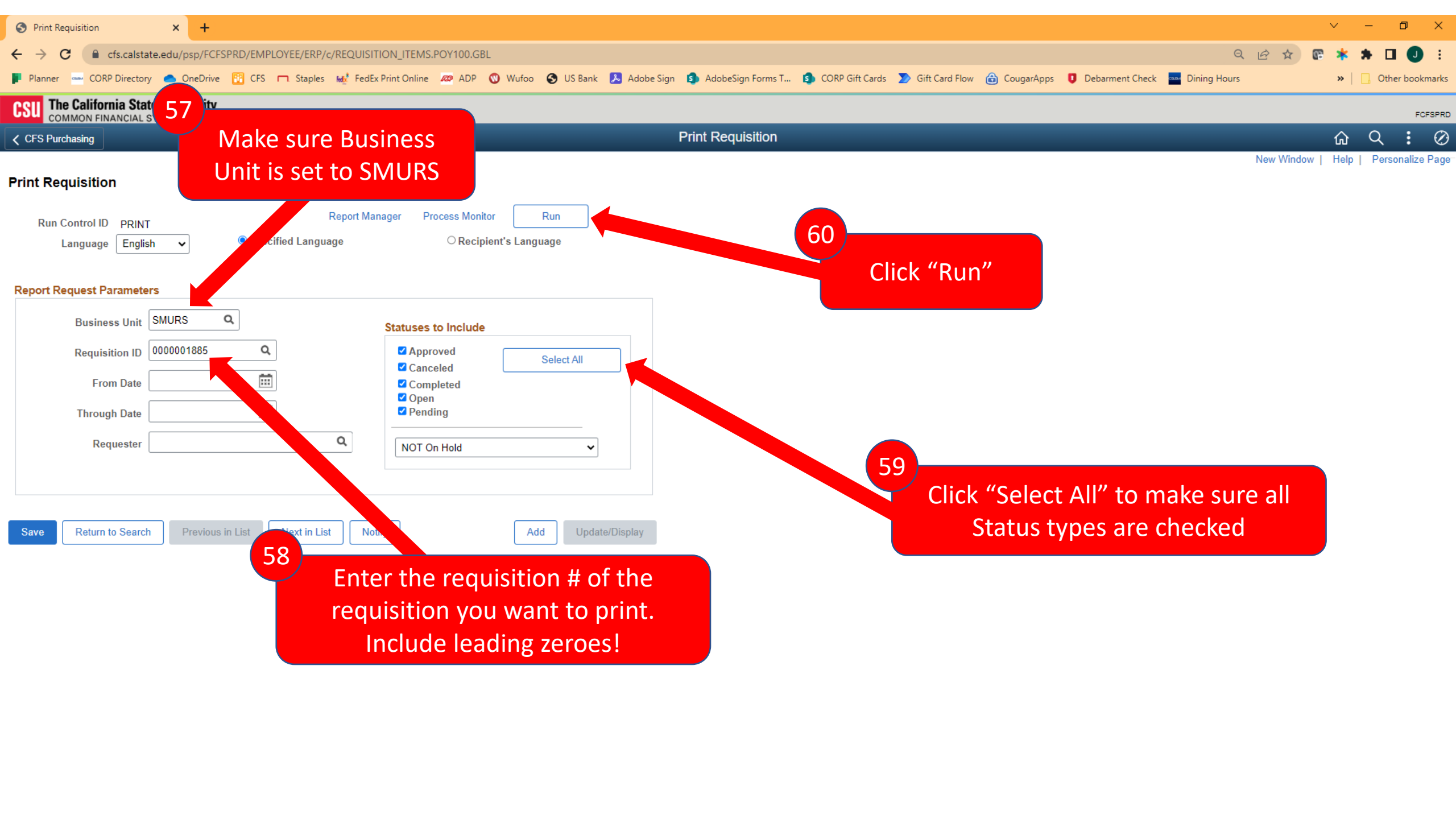
View All | 1-2 of 2

Run Control ID
PRINT
PS_PO_DISPATCH_DEFAULT

Find an Existing Value | Add a New Value

56
Click "PRINT"

If you don't see "PRINT" as an option, click "Add a new Value."
On the next screen, in the Run Control ID box type "PRINT" and then click "Add"



57

Make sure Business Unit is set to SMURS

60

Click "Run"

59

Click "Select All" to make sure all Status types are checked

58

Enter the requisition # of the requisition you want to print. Include leading zeroes!

Process Scheduler Request

User ID: 68100263754 | Run Control ID: PRINT

Server Name: [dropdown] | Run Date: 04/20/2023 [calendar icon]

Recurrence: [dropdown] | Run Time: 5:02:53PM [Reset to Current Date/Time button]

Time Zone: [dropdown]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	Distribution

OK | Cancel

61 Ensure that the dropdowns are set to "Web" and "PDF", then click "OK"

Print Requisition

Run Control ID: PRINT
Language: English
Report Manager | Process Monitor | Run
Specified Language | Requester's Language
Process Instance: 25332397

Report Request Parameters

Business Unit: SMURS
Requisition ID: 000001885
From Date:
Through Date:
Requester:
Statuses to Include:
 Approved
 Canceled
 Completed
 Open
 Pending
NOT On Hold

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display

62
Click "Process Monitor"

View Process Request For

User ID: 68100263754 | Type: [] | Last: [] | 1 Days | Refresh | Clear | Reset

Server: [] | Name: [] | Instance From: [] | Instance To: []

Run Status: [] | Distribution Status: [] | Save On Refresh | Report Manager

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	25332397		SQR Report	PORQ010	68100263754	04/20/2023 5:02:53PM PDT	Success	Posted	Details	Actions
<input type="checkbox"/>	25331930		Application Engine	FS_BP	68100263754	04/20/2023 4:26:51PM PDT	Success	Posted	Details	Actions

Go back to Requisition Print | Save | Notify

63

Click "Refresh" until Run Status shows "Success" and Distribution Status shows "Posted" on the top row. This may take approximately 30 seconds, and you may need to click "Refresh" multiple times

64

Once you see the correct Statuses, click "Details" on the top row.

Process Detail

Process

Instance	25332397	Type	SQR Report
Name	PORQ010	Description	Requisition Print SQR
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	PRINT
Location	Server
Server	PSUNX2
Recurrence	

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Re-send Content
- Restart Request

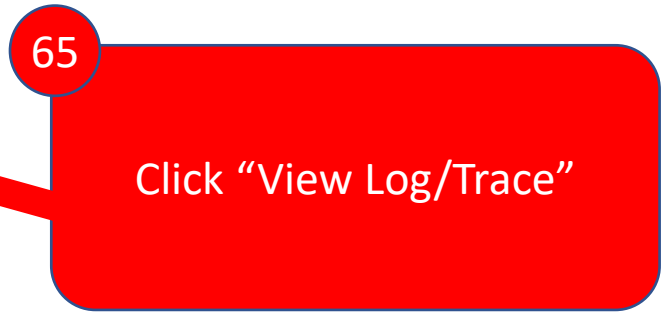
Date/Time

Request Created On	04/20/2023 5:10:37PM PDT
Run Anytime After	04/20/2023 5:02:53PM PDT
Began Process At	04/20/2023 5:11:09PM PDT
Ended Process At	04/20/2023 5:11:23PM PDT

Actions

- Parameters
- Message Log
- Batch Timings
- View Log/Trace

OK Cancel



View Log/Trace

Report

Report ID 15517631 Process Instance 25332397 [Message Log](#)
Name PORQ010 Process Type SQR Report
Run Status Success

Requisition Print SQR

Distribution Details

Distribution Node FCFSRPD Expiration Date 06/04/2023

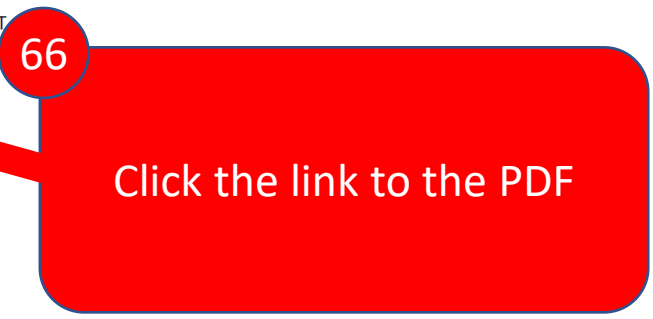
File List

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_25332397.log	1,670	04/20/2023 5:11:23.004026PM PDT
porq010_25332397.PDF	5,089	04/20/2023 5:11:23.004026PM PDT
porq010_25332397.out		04/20/2023 5:11:23.004026PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	68100263754

[Return](#)



67

Congratulations, here is your Requisition! Save this PDF to a location of your choosing.

Requisition

CSUSM Corporation

Ship To: Receiving
441 La Moree Road
San Marcos CA 92078

Business Unit:	SMURS	APPROVED
Req ID	Date	Page
0000001885	04/19/2023	1
Requester	Telephone	Entered By
Cox,Justin		Cox,Justin

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date	Dist Amt
Distribution	Account			Prgm	Class	Project				
Buyer: Cox,Justin										
1-1	TEST DESCRIPTION			96200	1.0000	LOT	5.00	5.00		
1-1-1	613001	92001	1330				81500			5.00
<u>Line Total:</u>								5.00		
<u>Total Requisition Amount:</u>								5.00		

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvcesandfinance/corpprocurement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Service Start Date: End Date:

Description of Services (what is the vendor going to do for us, and how will we know the job has been done to our requirements?):

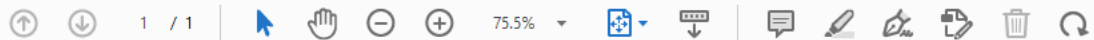
Enter Vendor Contact name, email, and phone#:
Enter Campus Contact name, email, and phone#:

Terms and Conditions
https://www.csusm.edu/corp/businesssvcesandfinance/corpprocurement/genprov_services.pdf



Obtain Req Approval & Submit for PO

Section 8



68

Use Adobe Acrobat to open the saved PDF

Requisition

CSUSM Corporation

Ship To: Receiving
441 La Moree Road
San Marcos CA 92078

Business Unit: SMURS		APPROVED
Req ID	Date	Page
000001885	04/19/2023	1
Requester	Telephone	Entered By
Cox,Justin		Cox,Justin

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project		Dist Amt	
Buyer: Cox,Justin									
1-1	TEST DESCRIPTION			98200	1.0000	LOT	5.00	5.00	
1-1-1	613001	92001	1330				81500		5.00
<u>Line Total:</u>								5.00	
<u>Total Requisition Amount:</u>								5.00	

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvoesandfinance/corpprocurement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Service Start Date: End Date:

Description of Services (what is the vendor going to do for us, and how will we know the job has been done to our requirements?):

Enter Vendor Contact name, email, and phone#: Enter Campus Contact name, email, and phone#:

Terms and Conditions
https://www.csusm.edu/corp/businesssvoesandfinance/corpprocurement/genprov_services.pdf

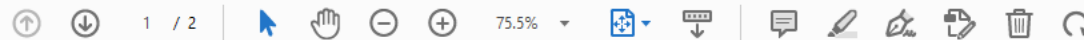
69

Use Acrobat to combine this file with the same backup documents that you previously attached to the Req Comments in Steps 32-36

Yes, CFS should do this automatically. Does it? No.

Combine Files





Requisition CSUSM Corporation

Ship To: Receiving
441 La Moree Road
San Marcos CA 92078

Business Unit: SMURS		APPROVED	
Req ID	Date	Page	
000001885	04/19/2023	1	
Requester	Telephone	Entered By	
Cox,Justin		Cox,Justin	

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project		Dist Amt	
Buyer: Cox,Justin									
1-1	TEST DESCRIPTION			98200	1.0000	LOT	5.00	5.00	
1-1-1	613001	92001	1330				81500		5.00
<u>Line Total:</u>								5.00	
<u>Total Requisition Amount:</u>								5.00	

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
<https://www.csusm.edu/corp/businesssvoesandfinance/corpprourement/corpinsrequirements.pdf>

Delete this line and up if conditions are met, enter the following info and press OK.

Service Start Date: End Date:

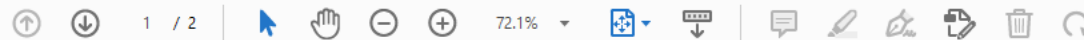
Description of Services (what is the vendor going to do for us, and how will we know the job has been done to our requirements?):

Enter Vendor Contact name, email, and phone#: Enter Campus Contact name, email, and phone#:

Terms and Conditions
https://www.csusm.edu/corp/businesssvoesandfinance/corpprourement/genprov_services.pdf

Request E-signatures

70 Use Acrobat to send this Req to the relevant Approving Authority on the project for approval (Signature anywhere on the cover page is fine)



Certified by Adobe Acrobat Sign <acrobat-sign-certified@adobe.com>, prod-hsm, certificate issued by Adobe CDS CA.

Signature Panel

Requisition

CSUSM Corporation

Ship To: Receiving
441 La Moree Road
San Marcos CA 92078

Business Unit:	SMURS	APPROVED
Req ID	Date	Page
000001885	04/19/2023	1
Requester	Telephone	Entered By
Cox,Justin		Cox,Justin

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project		Dist Amt	
Buyer: Cox,Justin									
1-1	TEST DESCRIPTION			06200	1.0000	LOT	5.00	5.00	
1-1-1	613001	92001	1330				81500		5.00
<u>Line Total:</u>								5.00	
<u>Total Requisition Amount:</u>								5.00	

Is the vendor coming onto campus property? If yes, insurance is required by CSU policy, must be included prior to start of work, and attached to this requisition. See the following link to share insurance requirements.
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Delete this line and up if conditions are met, enter the following info and press OK.

Service Start Date: End Date:

Description of Services (what is the vendor going to do for us, and how will we know the job has been done to our requirements?):

Enter Vendor Contact name, email, and phone#: Enter Campus Contact name, email, and phone#:

https://www.csusm.edu/corp/businesssvcesandfinance/corpprourement/genprov_services.pdf

You now have a completed, approved requisition packet! Email this approved Req PDF to the CSUSM Corporation Procurement team and we will generate a PO within 48hrs (or notify you if we see issues with the requisition). CORP Procurement will send the completed PO directly to the Supplier.