



Review Requisitions

This guide outlines the process to review a requisition. A Requisition is a request for goods or services for use by your department. The approval process for requisitions is a 3-tier system; The Requestor who enters the requisition, the Reviewer who reviews line items and expenditures, and the Approver who approves the requisition to be made into a Purchase Order. There could be more than one reviewer depending on the individual department policy, but only one Approver.

Purchasing > Requisition > Add/Update Requisitions

<Enter Subject here>

AFilson@csustan.edu

Sent: Mon 8/2/2010 1:13 PM

To: April Dunham-Filson

Workflow Notification

Priority: 2-Medium

Date Sent: 2010-08-02

Sent To: afilson@csustan.edu

cc:

Please click on the link below to access this transaction:

https://cmsdev4.calstate.edu/psp/FSTATST/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=REQ_FORM&BUSINESS_UNIT=STCMP&REQ_ID=0000000012&Action=U

Message Text:

Please approve.

1. An email will be received for each requisition that needs to be reviewed and/or approved.
2. Click on the link within the email to access the requisition page.

NOTE: If you are not currently logged into PeopleSoft, the link will take you to the login page. Enter your UserID and Password.

Maintain Requisitions

Requisition

Business Unit: STCMP

Status: Open

Requisition ID: 0000000012

Budget Status: Not Chk'd

Hold From Further Processing

Header

*Requester: REQUESTER Requester

[Requisition Defaults](#)

*Requisition Date: 08/02/2010 Requester Info

[Edit Comments](#)

*Origin: ONL Online

[Requisition Activities](#)

*Currency Code: USD Dollar

[Document Status](#)

Accounting Date: 08/02/2010

Amount Summary

Total Amount: 10,000.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)


[Item Search](#) [Requester Items](#)

Select Lines To Display

Line: To: [Retrieve](#)

Line Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls | Customize | Find | View All | First | 1 of 1 | Last

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status
1		Blanket Order for supplies	1.0000	LOT	96200	10,000.0000	10,000.00	Open

3. Review the Total Amount in the Account Summary.
4. Review the lines to see what is being purchased.
5. Select the Schedule icon  , if you would like to review the Chartfield information.



Maintain Requisitions

Schedule

Business Unit: STCMP Requisition Date: 08/02/2010
 Requisition ID: 000000012 Status: Open

[Return to Main Page](#)

Line	Item:	Quantity:	Batch Lot	Amount:
1	Blanket Order for supplies	1.0000		10,000.00 USD

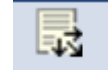
Schedule

Sched	Ship To	Quantity	Price	Amount	Due Date	Status
1	STANM	1.0000	10,000.00000	10,000.00	06/30/2011	Active

[Add Ship To Comments](#)

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

6. Select the Distribution icon



to review the Chartfield string.

Maintain Requisitions

Distribution

Requisition ID: 000000012 Item: [Blanket Order for supplies](#)

Line: 1 Status: Active

Schedule: 1

Ship To: STANMAIN Stan Main Quantity: 1.0000 LOT

*Distribute by: Amount Open 10,000.000

*Liquidate by: Amount Amount: 10,000.00 USD

SpeedChart: [Multi-SpeedCharts](#)

Distributions

Distrib	Status	Percent	Amount	Account	Fund	Dept	Program	Location
1	Open	100.0000	10,000.00	613001	G0106	41500		STANMSR270

OK Cancel Refresh

7. Click OK to return to the Schedule information.

Maintain Requisitions

Schedule

Business Unit: STCMP Requisition Date: 08/02/2010
 Requisition ID: 000000012 Status: Open

[Return to Main Page](#)

Line	Item:	Quantity:	Batch Lot	Amount:
1	Blanket Order for supplies	1.0000		10,000.00 USD

Schedule

Sched	Ship To	Quantity	Price	Amount	Due Date	Status
1	STANM	1.0000	10,000.00000	10,000.00	06/30/2011	Active

[Add Ship To Comments](#)

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

8. Select the Return to Main Page link



Maintain Requisitions

Requisition

Business Unit: STCMP **Status:** Open
Requisition ID: 000000012 **Budget Status:** Not Chk'd

Hold From Further Processing

Header

*Requester: REQUESTER Requester [Requisition Defaults](#)
 *Requisition Date: 08/02/2010 [Requester Info](#) [Edit Comments](#)
 Origin: ONL Online [Requisition Activities](#)
 *Currency Code: USD Dollar [Document Status](#)

Accounting **Amount Summary**
 Date: 08/02/2010 **Total Amount:** 10,000.00 USD

Add Items From **Select Lines To Display**

[Purchasing Kit](#) [Catalog](#) Line: To: **Retrieve**
[Item Search](#) [Requester Items](#)

9. Select the Requisition Activities link.

Activities

Business Unit: STCMP **Requisition Date:** 08/02/2010
Requisition ID: 000000012 **Status:** Open

Requisition Activities Customize | Find | First 1 of 1 Last

Done	*Due Date	*SeqNum	Comments
<input type="checkbox"/>	08/02/2010	1	

OK **Cancel** **Refresh**

NOTE: The Add a Line button only need to be selected if there are currently comments listed.

10. Click the Add a Line button



11. Enter your comment and select the Done box.

12. Click OK button

Line Customize | Find | View All | First 1 of 1 Last

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status
1		Blanket Order for supplies	1.0000	LOT	96200	10,000.0000	10,000.00	Open

[View Printable Version](#) *Go to: ...More...

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

13. Click the Save button

14. Once the requisition is saved, click the Notify button.



Notification is sent to the next person in line for review or approve.

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details		Lookup Recipient	Delivery Options
To:	<input type="text"/>		
CC:	<input type="text"/>		
BCC:	<input type="text"/>		
Priority:	<input type="text"/>		
Subject:	<input type="text" value=" <Enter Subject here>"/>		
Template Text:	Workflow Notification Priority: %NotificationPriority Date Sent: 2010-08-02		
Message:	<input type="text"/>		

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

- 15. Enter the individuals email in the To: field
- 16. Enter the individuals email in the CC: field, if necessary
- 17. Select the priority level from the drop down menu
- 18. Enter a subject
- 19. Type your message
- 20. Click the OK button