



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

<p>From: afison@csustan.edu To: April Dunham-Filson Cc: Subject: Requisition #0000000479 - Please see item (1) below</p> <p>Requisition Notification for STCMP #0000000479. Detail messages are listed below.</p> <p>1 - This is a request to approve the Requisition 2 - This is a general inquiry 3 - The Requisition has been approved and ordered from vendor</p> <p>If you are not already signed in to PeopleSoft, login thru the portal.</p> <p>***Click the below link to view the Requisition page*** https://cfs.calstate.edu/psp/FCFSPRD/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=PT_WF_NOTIFY&Action=U&BUSINESS_UNIT=STCMP&REQ_ID=0000000479</p> <p>Please review and forward. ADF</p>	<ol style="list-style-type: none">1. An email will be received for each requisition that needs to be reviewed and/or approved.2. Login to the Finance CFS System.
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<p>California State University Stanislaus</p> <p>ADMISSIONS ACADEMICS ABOUT US STUDENT LIFE ATHLETICS ALUMNI GIVING NEWS & EVENTS</p> <p>Why? Reason. № 285 We have the Programs Want More Reasons? APPLY TO CSU STANISLAUS</p> <p>PROSPECTIVE STUDENTS CURRENT STUDENTS PARENTS & VISITORS CATALOG/CLASS SCHEDULE ONLINE LEARNING PRESIDENT'S OFFICE LIBRARY STOCKTON CENTER QUICK LINKS</p> <p>University News 05.24.2011 CSU Stanislaus President Shirvani Statement on Special Budget Meeting Between CSU Leaders and Governor Brown 05.23.2011 CSU Stanislaus To Welcome Newest Graduates at May 27 Commencement Ceremonies 05.23.2011 CSU Stanislaus Receives Prestigious Presidential Community Service Recognition for the Fifth Year in a Row</p> <p>Events 5.26 - 5.28 NCAA Track & Field Championships 5.27.2011 Commencement SUMMER 2011 REGISTER NOW Budget Central »</p> <p>CSUSTAN</p>	<ol style="list-style-type: none">3. Click on the MyCSUSTAN link on the Main Campus Webpage.
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Purchasing

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 **California State University Stanislaus**

ADMISSIONS ACADEMICS ABOUT US STUDENT LIFE ATHLETICS ALUMNI GIVING NEWS & EVENTS



myCSUSTAN

Resources

- Blackboard
- E-mail »
- Finance CFS system login
- Finance Legacy system login
- Data Warehouse Reports
- Financial Aid | Scholarships
- Data Warehouse Reports
- Library
- Records & Transcripts

Access Hours

System is available
24 hours, 7 days a week
EXCEPT for every Thursday
from 9 PM to Midnight

Welcome to My CSUSTAN...

User ID:
(What is my User ID?)

Password:
(What is my Password?)

Login Assistance

- Need HELP? »
- Lookup Your Student University ID
- Password & Sign In Information »
- What can MyCSUSTAN do for me? »
- Problems or Comments

Summer 2011 Registration

Log in to register for classes. Please visit the Summer site for key dates and policies. *Newly*

Dates & Deadlines

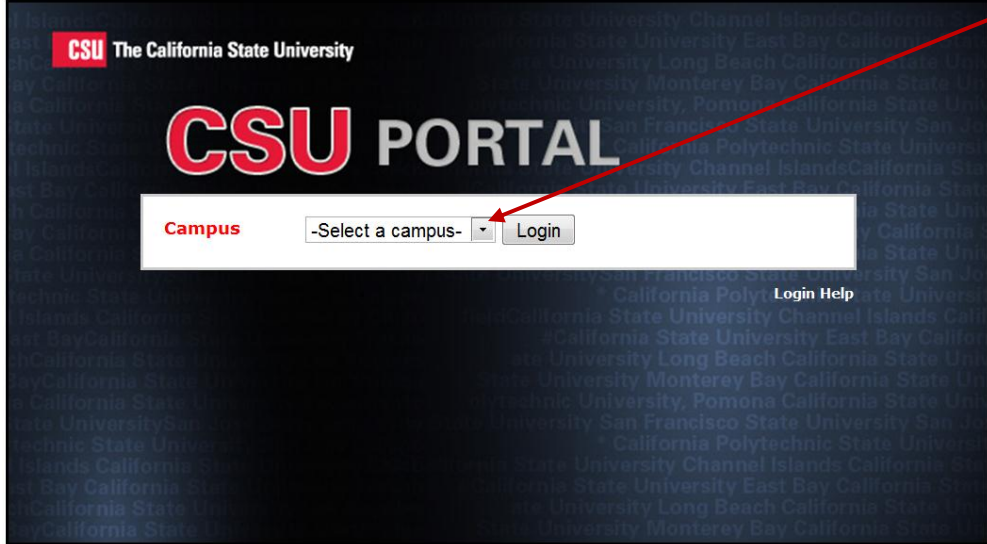
- Fee Payment Deadlines
detailed information...
- Final Exams

4. Click on Finance CFS System login link

CSU The California State University

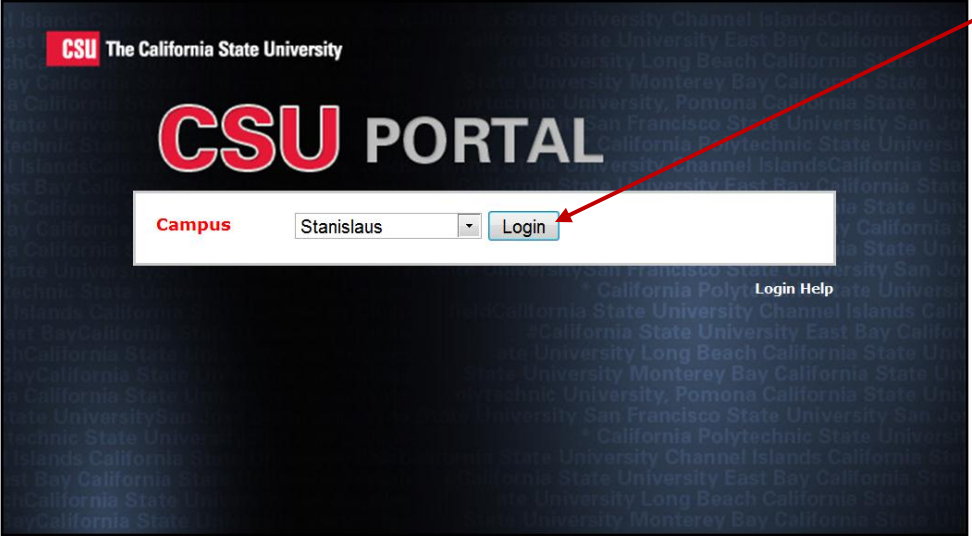
CSU PORTAL

Campus

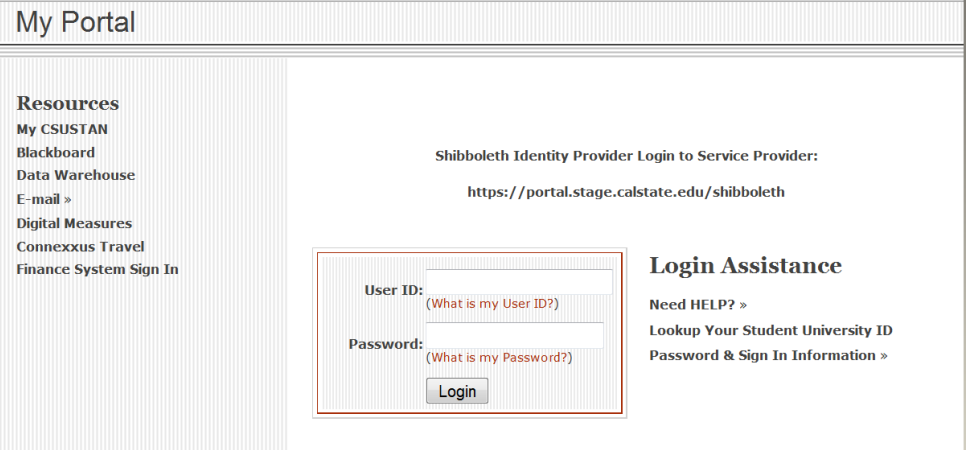


5. Select Stanislaus from the drop down menu





6. Click the Login button




7. Enter a User ID

8. Enter a Password

9. Click the Login button

NOTE: User ID and Passwords are specific to each individual and are the normal credentials a user uses to login to their email.



10. Select Financial Services



CSU The California State University

Logout

CSU PORTAL

CSU Portal Financial Services Financial Reports IT Support My Profile

Announcements

Scheduled Production Outage
Thursday, June 2, 2011 from 6:00 PM to 10:00 PM.

CFS Login

- Production

11. Select Production

ORACLE®

Personalize [Content](#) | [Layout](#)

[Home](#) | [Add to Favorites](#) | [Sign out](#) | [Help](#)

Menu

Search:

- My Favorites
- Purchasing
- eProcurement
- Accounts Payable
- General Ledger
- CSU Administer Integration
- Set Up Financials/Supply Chain
- Reporting Tools
- My Personalizations

12. Navigate to the Add/Update Requisition page.

Purchasing > Requisition > Add/Update Requisition

Requisitions

Use the following search to look for an existing Requisition

Find an Existing Value | **Add a New Value**

Business Unit: = STCMP

Requisition ID: 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](#)

[Find an Existing Value](#) | [Add a New Value](#)

13. Click on the Find an Existing Value tab



<p>From: afillon@csustan.edu To: April Durham-Filson Cc: Subject: Requisition #0000000479 - Please see Item (1) below</p> <p>Requisition Notification for STCMP #0000000479. Details are listed below.</p> <p>1 - This is a request to approve the Requisition 2 - This is a general inquiry 3 - The Requisition has been approved and ordered from vendor</p> <p>If you are not already signed in to PeopleSoft, login thru the portal.</p> <p>***Click the below link to view the Requisition page*** https://cfs.calstate.edu/psp/FCFSPRD/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=PT_WF_NOTIFY&Action=U&BUSINESS_UNIT=STCMP&REQ_ID=0000000479</p> <p>Please review and forward. ADF</p>	<p>14. Reference back to your email</p> <p>15. Copy the Requisition ID from the email</p>
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<h2>Requisitions</h2> <p>Use the following search to look for an existing Requisition.</p> <p>Find an Existing Value Add a New Value</p> <p>Business Unit: = <input type="text" value="STCMP"/> </p> <p>Requisition ID: begins with <input type="text"/> </p> <p>Requisition Status: = <input type="text"/></p> <p>Origin: begins with <input type="text"/> </p> <p>Requester: begins with <input type="text"/> </p> <p>Requester Name: begins with <input type="text"/> </p> <p>Hold From Further Processing <input type="checkbox"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p> <p>Find an Existing Value Add a New Value</p>	<p>16. Paste the Requisition ID into the Requisition ID field</p> <p>17. Click the Search button</p>
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Maintain Requisitions

Requisition

Business Unit: STCMP
Requisition ID: 0000000012

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

Header

*Requester: REQUESTER Requester
*Requisition Date: 08/02/2010 Requester Info
Origin: ONL Online
*Currency Code: USD Dollar
Accounting Date: 08/02/2010

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

Amount Summary

Total Amount: 10,000.00 USD

Add Items From
[Purchasing Kit](#)
[Item Search](#)

Select Lines To Display
Line: To: [Retrieve](#)

Line

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

18. Select the Requisition Defaults link

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.

Line

Buyer: Unit of Measure:
Vendor: 0000001397 To Be Determined Vendor Location: 001
Category: [Vendor Lookup](#)

Schedule

Ship To: STANMAIN CSU Stanislaus Main Campus *Distribute by: Quantity
Due Date: 03/30/2011 *Liquidate by: Quantity
Ultimate Use Code:

Distribution

SpeedChart:

Distributions

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref
1		STCMP			G0106	51500			

[OK](#) [Cancel](#) [Refresh](#)

19. Review the Chartfield string

20. Click the Cancel button.



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 **Select Lines To Display**

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

Line: To: [Retrieve](#)

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

21. Click on the Edit Comments link.

Header Comments

Business Unit: STCMP Requisition Date: 02/10/2011
Requisition ID: 0000000239 Status: Open

☒ Retrieve Active Comments Only [Retrieve](#)

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending [Sort](#)

Comments [Find](#) | [View All](#) First 1 of 4 Last

[Copy Standard Comments](#) Comment Status: Active [Inactivate](#) [+](#)

April Dunham-Filson, OIT, X3689

These catalogs are being used to generate enrollment in the department of Public Administration.

☐ Send to Vendor ☐ Shown at Receipt ☐ Shown at Voucher

Associated Document

Attachment [Attach](#) [View](#) [Delete](#) ☐ Email

From -> REQ STCMP-0000000239

[OK](#) [Cancel](#) [Refresh](#)

22. Click on View All; to view all the comments available.

23. Review the comments listed.

NOTE: If there are split funding sources, there will be a comment stating such. Refer to step 21.

24. Click the [+](#) Add a New Row icon to add a comment

25. Type a justification.

26. Click the OK button.



Maintain Requisitions

Requisition

Business Unit: STCMP
Requisition ID: 0000000012

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

Header

*Requester: REQUESTER
*Requisition Date: 08/02/2010
Origin: ONL
*Currency Code: USD
Accounting Date: 08/02/2010

Requester
Requester Info
Online
Dollar
Amount Summary
Total Amount: 10,000.00 USD
Select Lines To Display
Line: To: Retrieve


Line

Details | Ship To Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status
1		Blanket Order for supplies	1.0000	LOT	96200	10,000.00000	10,000.00	Open

NOTE: Steps 27- 31 only need to be completed if a comment was entered stating that this order is being split between funding sources.

27. Select the Schedule icon



Maintain Requisitions

Schedule

Business Unit: STCMP
Requisition ID: 0000000012

Requisition Date: 08/02/2010
Status: Open

Return to Main Page

Line

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

Schedule


Details | Ship To | Quantity | Price | Amount | Due Date | Status

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

28. Select the Distribution icon



Maintain Requisitions

Distribution

Requisition ID: 0000000012
Line: 1
Schedule: 1

Item: Blanket Order for supplies
Status: Active

Ship To: STANMAIN
Stan Main
Quantity: 1.0000 LOT
Open Amount: 10,000.000
*Distribute by: Amount
*Liquidate by: Amount
SpeedChart: Multi-SpeedCharts

Distributions

Chartfields

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

OK | Cancel | Refresh

29. Review the split funding sources

30. Click OK to return to the Schedule information.



Maintain Requisitions

Schedule

Business Unit: STCMP Requisition Date: 08/02/2010
Requisition ID: 0000000012 Status: Open

[Return to Main Page](#)

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

Schedule

Details

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

31. Select the Return to Main Page link

Maintain Requisitions

Requisition

Business Unit: STCMP Requisition ID: 0000000012
Status: Open Budget Status: Not Chk'd
☒ Hold From Further Processing

Header

*Requester: REQUESTER Requester
*Requisition Date: 08/02/2010
Origin: ONL Online
*Currency Code: USD Dollar
Accounting Date: 08/02/2010

[Requester Info](#)
[Requisition Defaults](#)
[Edit Comments](#)
[Requisition Activities](#)
[Document Status](#)

Amount Summary
Total Amount: 10,000.00 USD

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

Select Lines To Display
Line: To: Retrieve

32. Select the Requisition Activities link.

Activities

Business Unit: STCMP Requisition Date: 04/13/2011
Requisition ID: 0000001391 Status: Open


Requisition Activities
Customize Find First 1 of 1 Last

Done	*Due Date	*SeqNum	Comments
1	05/18/2011	1	Sent to Lee for Review. CR

OK

Cancel

Refresh

33. Click the Add a Line button 



Activities

Business Unit: STCMP **Requisition Date:** 04/13/2011
Requisition ID: 0000001391 **Status:** Open

Requisition Activities					
Customize Find First 1-2 of 2 Last					
	Done	*Due Date	*SeqNum	Comments	
1	<input type="checkbox"/>	05/18/2011	1	Sent to Lee for Review. CR	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="checkbox"/>	05/18/2011	2		<input type="button" value="+"/> <input type="button" value="-"/>

34. Enter your comment, including your initials or name.

Sample Comment:
Reviewed and forwarded.
REV

35. Click OK button

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

36. Click the Save button

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

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: reviewer@csustan.edu

CC:

BCC:

Priority:

Subject: <Enter Subject here>

Template Text: Workflow Notification
Priority: %NotificationPriority
Date Sent: 2010-08-02

Message:

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.

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

38. Enter the individuals email in the To: field or
Click the Lookup Recipient link

39. Select the priority level from the drop down menu

40. Type your message

SAMPLE MESSAGE:
Dear Reviewer, please review the requisition and forward to the next approving authority

41. Click the OK button