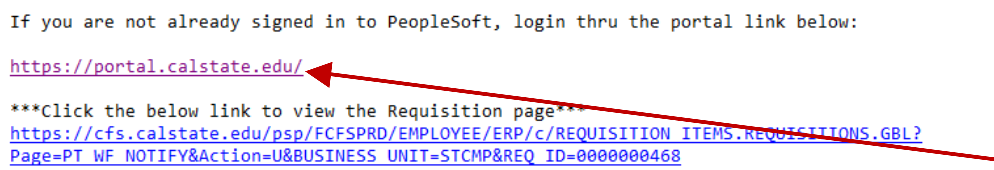
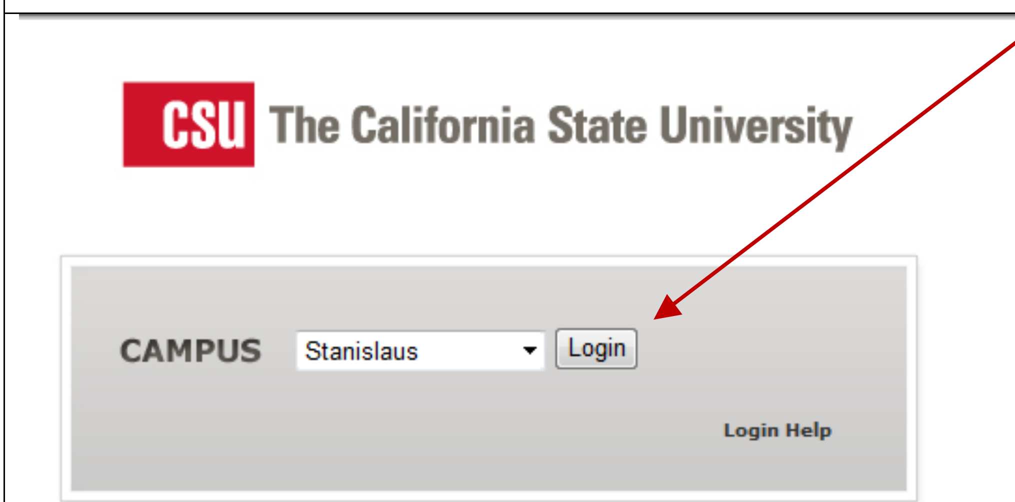
Review Requisitions

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.

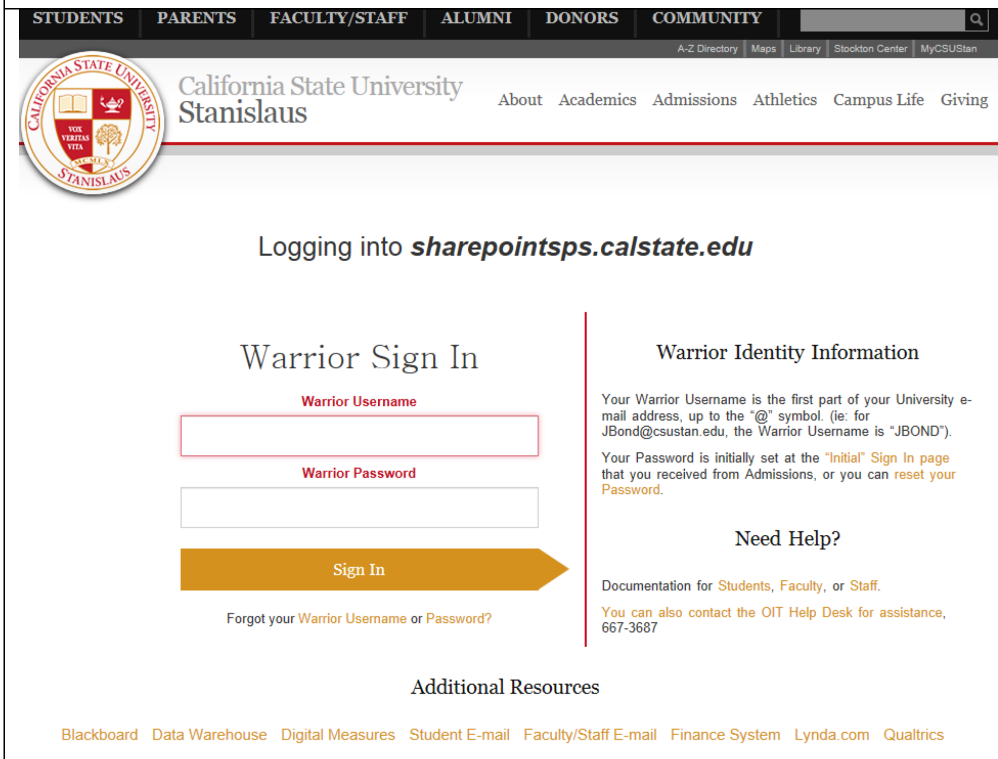
Purchasing > Requisition > Add/Update Requisitions



1. An email will be received for each requisition that needs to be reviewed and/or approved.
2. Click the link to login to the Portal

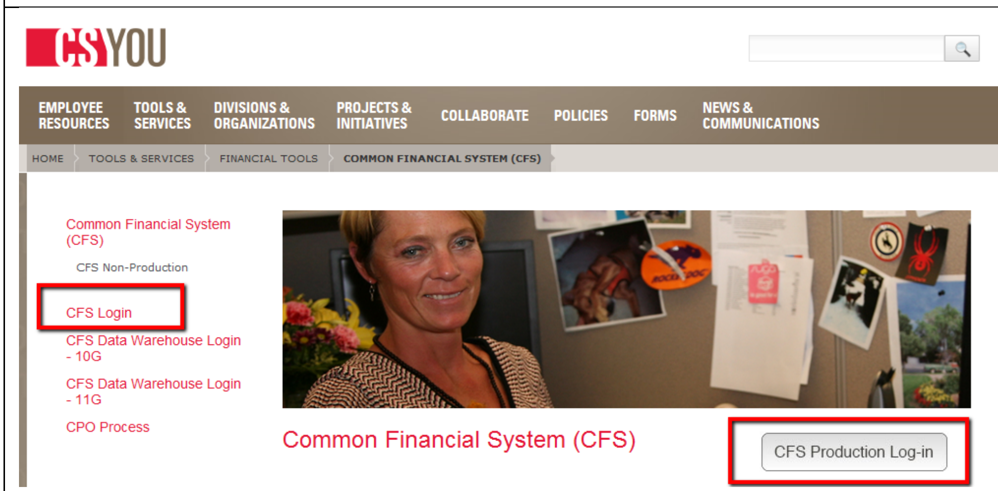


3. Select Stanislaus from the drop down menu, then click Login



4. Enter a User ID
5. Enter a Password
6. Click the Sign In button

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



7. Select CFS Login from the list on the left or click the CFS Production Log-in button on the right.

If you are not already signed in to PeopleSoft, login thru the portal link below:

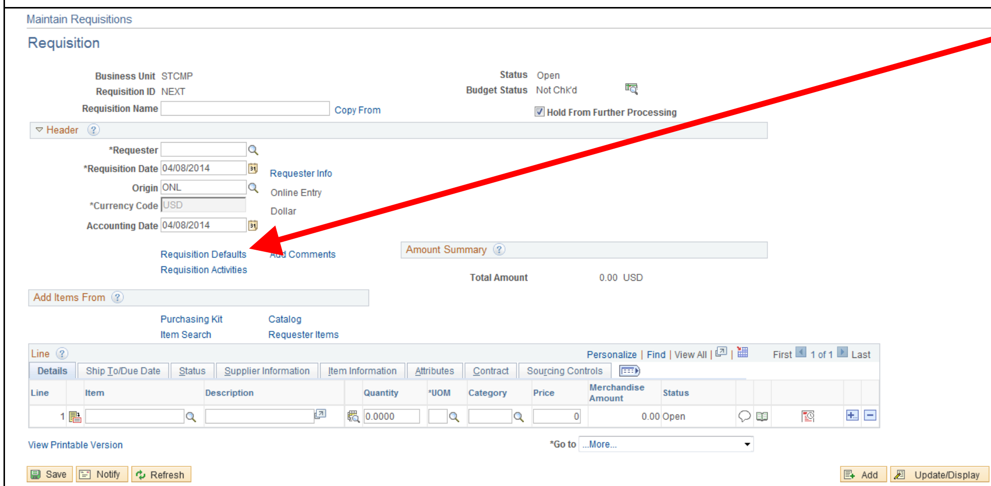
https://portal.calstate.edu/

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=0000000468

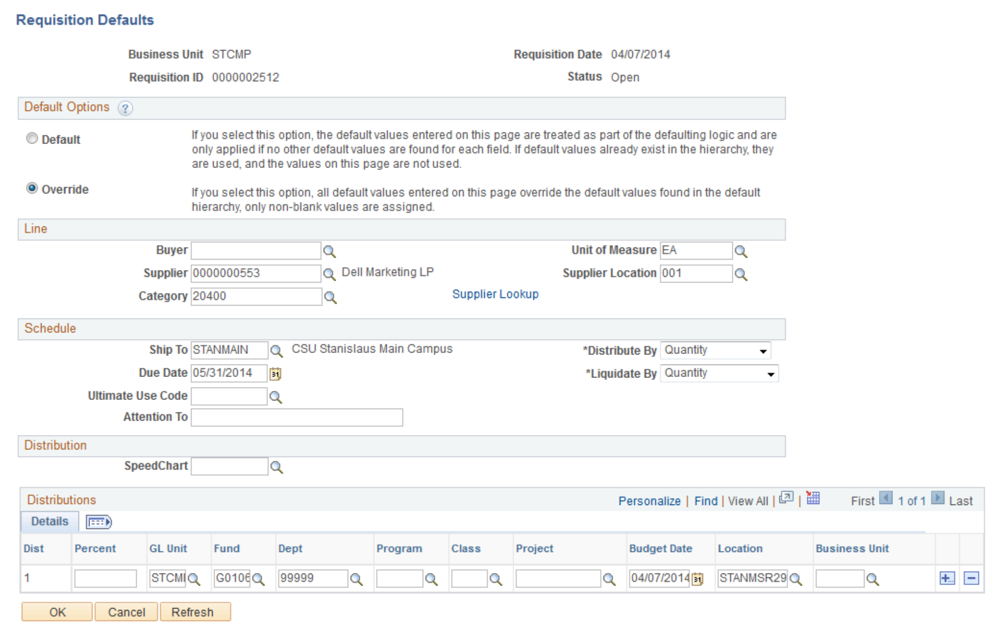
8. Navigate back to your original email

9. Click on the link

NOTE: You will be directed to the requisition page.

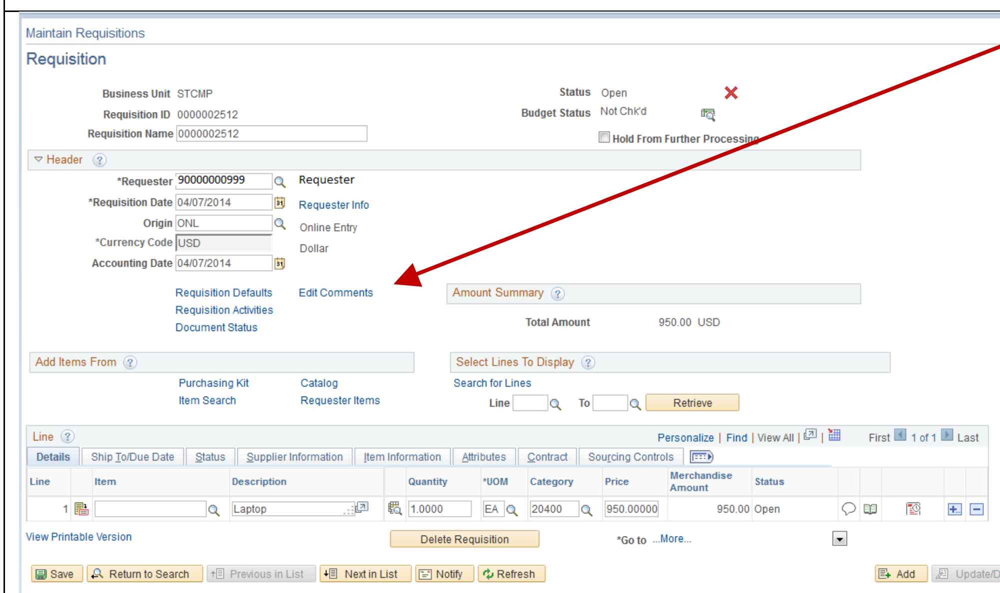


10. Select the Requisition Defaults link

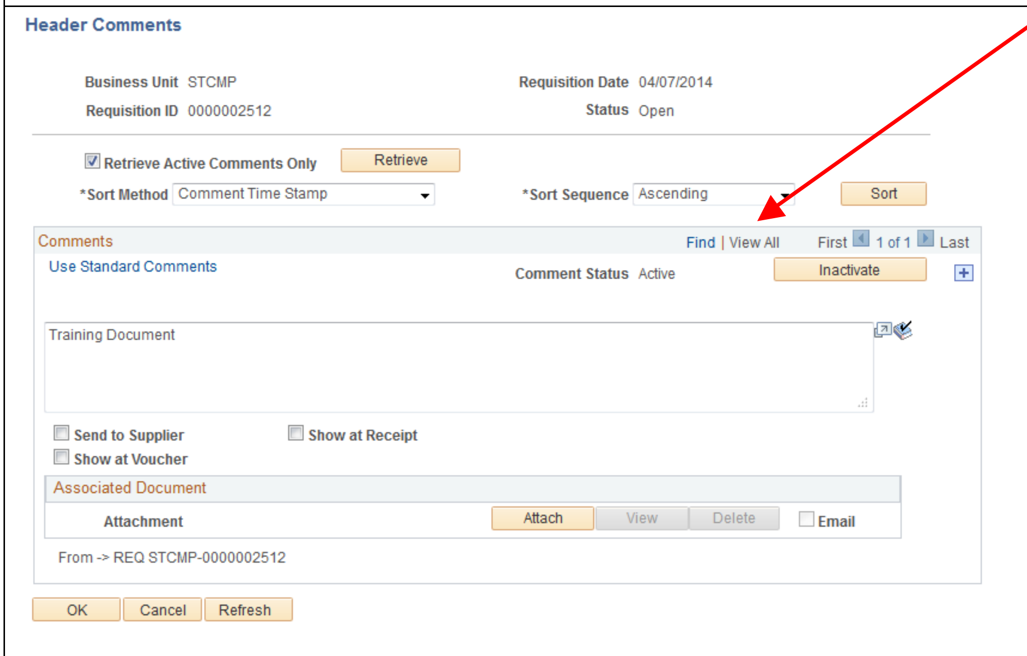


11. Review the Chartfield string

12. Click the Cancel button.



13. Click on the Edit Comments link.



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

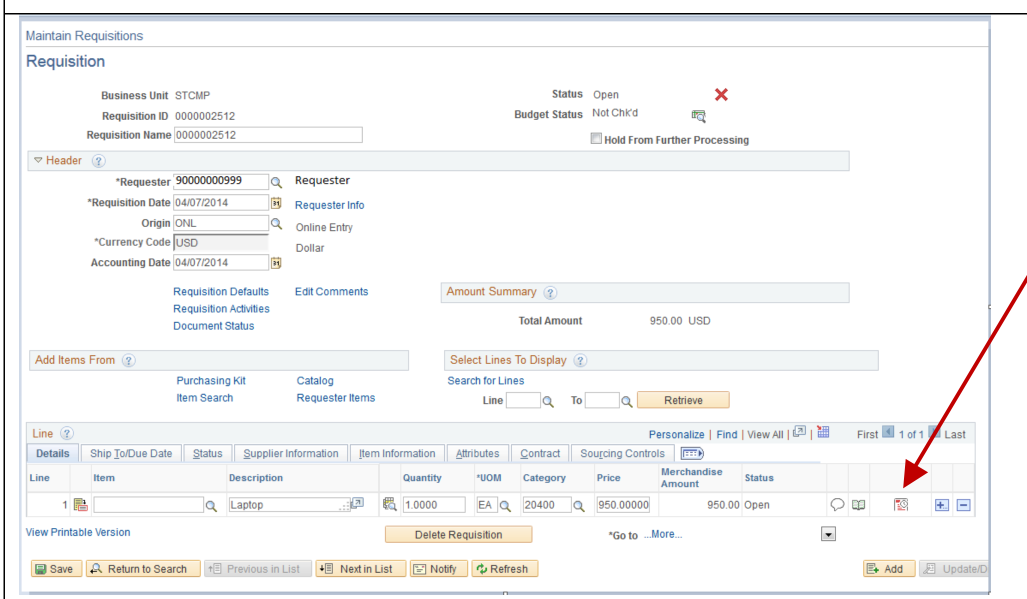
15. Review the comments listed.

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

16. Click the Add a New Row icon to add a comment

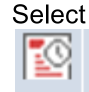
17. Type a justification.

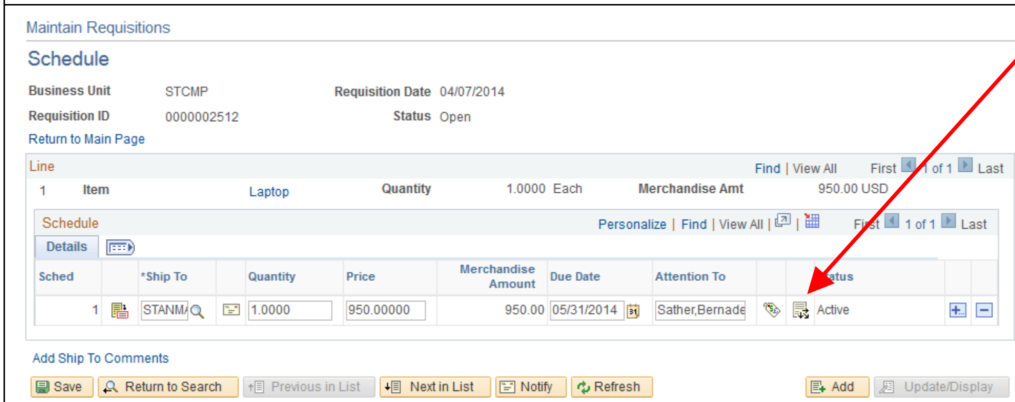
18. Click the OK button.

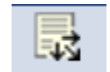


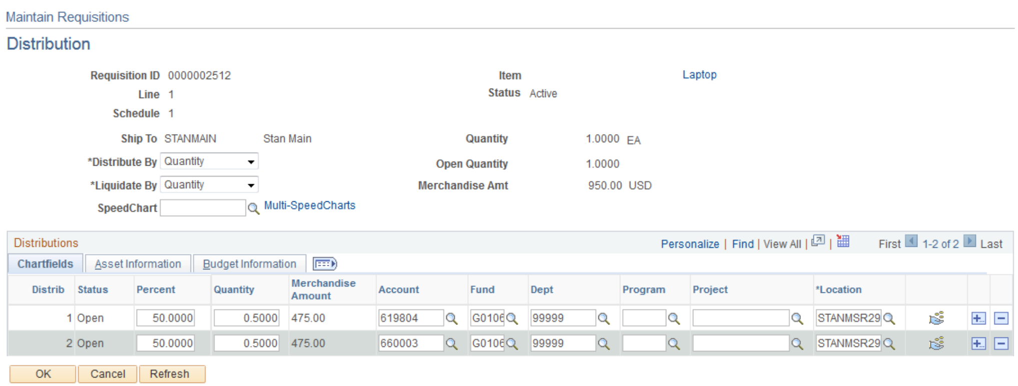
NOTE: Steps 21-25 only need to be completed if a comment was entered stating that this order is being split between funding sources.

19. Select the Schedule icon



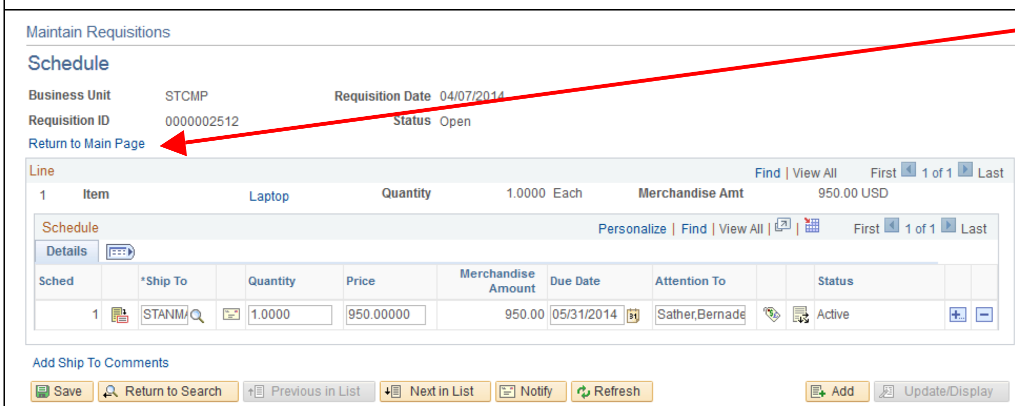


20. Select the Distribution  icon

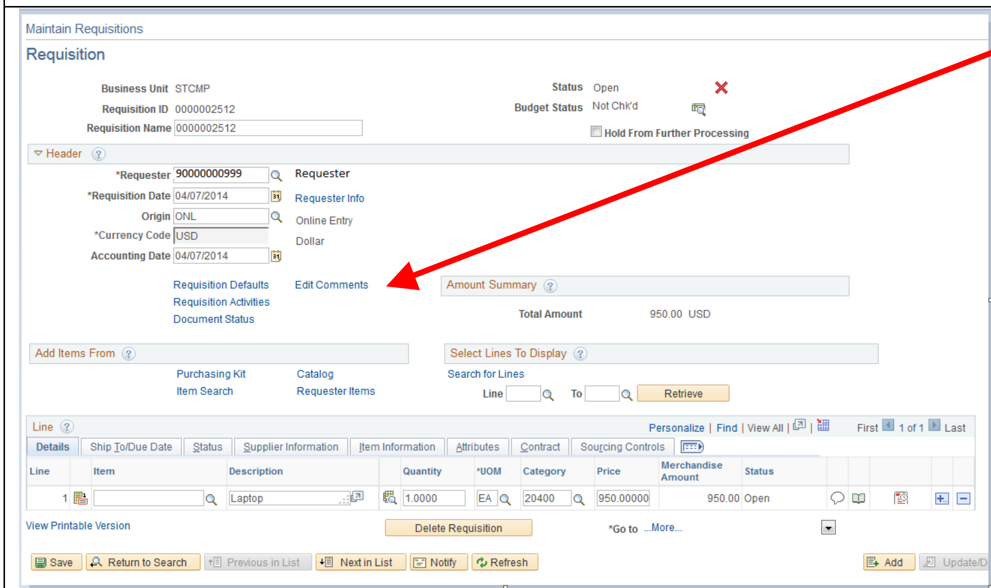


21. Review the split funding sources

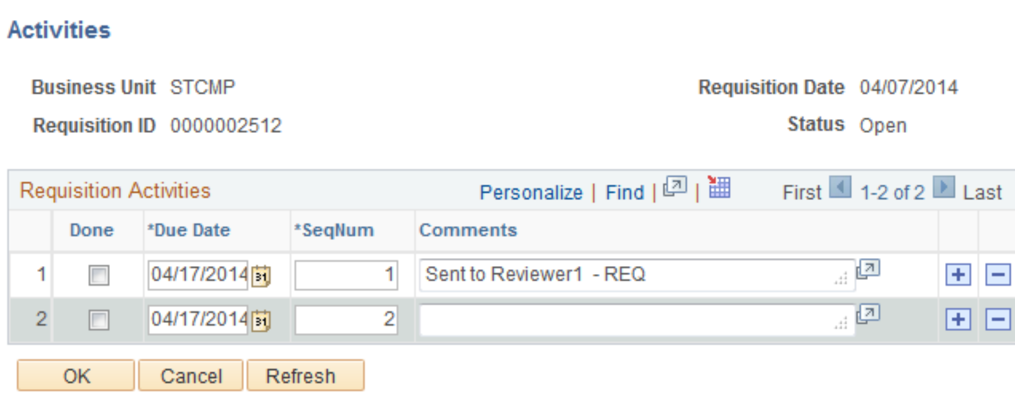
22. Click OK to return to the Schedule information.



23. Select the Return to Main Page link



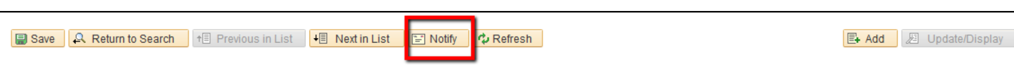
24. Select the Requisition Activities link.



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

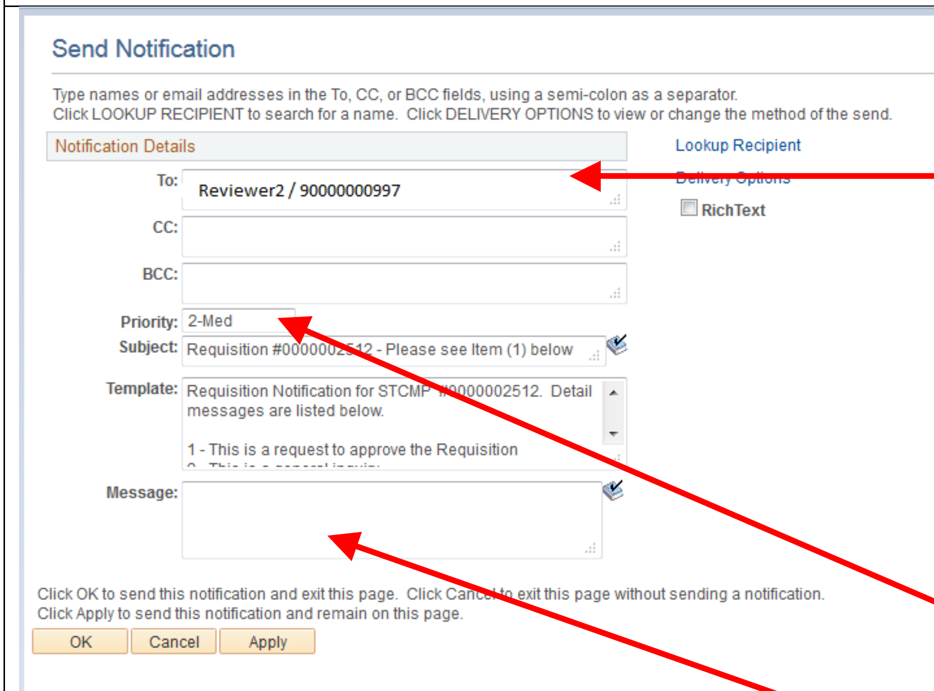
Sample Comment: Reviewed and forwarded. REV

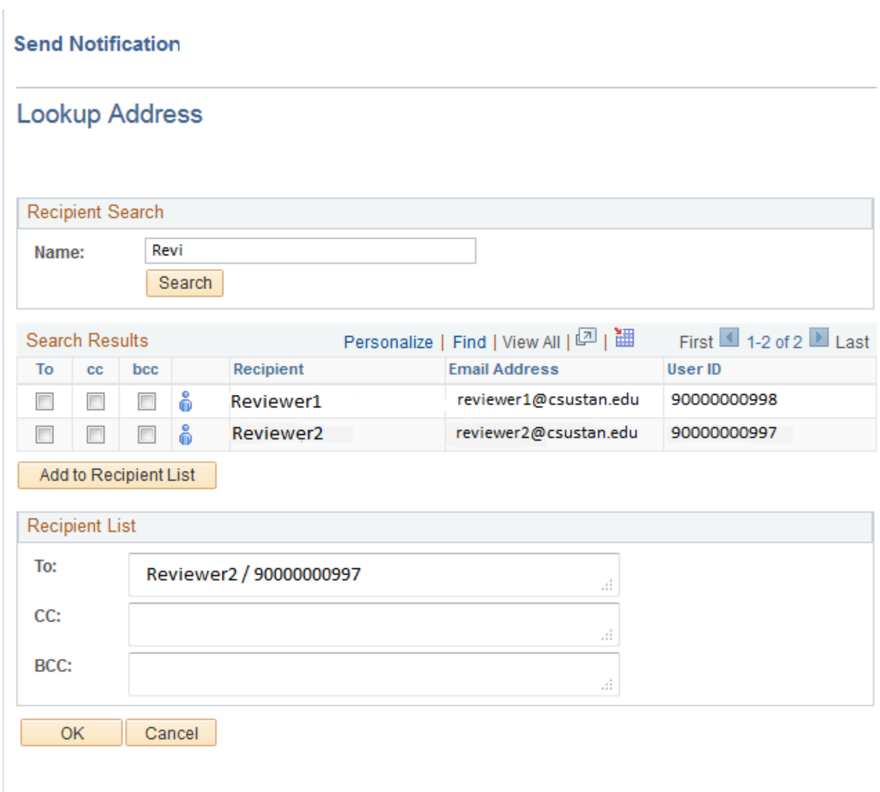
26. Click OK button



27. Click the Save button

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





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

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

**NOTE: If you use the lookup receipient feature the requisition will appear in the receipient's worklist. Although worklist is not functional at this time it may be in the future.

30. Select the priority level from the drop down menu

31. Type your message

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

32. Click the OK button