



## 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

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/FCFSRPD/EMPLOYEE/ERP/c/REQUISITION\\_ITEMS.REQUISITIONS.GBL?Page=PT\\_WF\\_NOTIFY&Action=U&BUSINESS\\_UNIT=STCMP&REQ\\_ID=0000000468](https://cfs.calstate.edu/psp/FCFSRPD/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=PT_WF_NOTIFY&Action=U&BUSINESS_UNIT=STCMP&REQ_ID=0000000468)

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

**CSU** The California State University

CAMPUS Stanislaus Login

Login Help

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



STUDENTS PARENTS FACULTY/STAFF ALUMNI DONORS COMMUNITY

California State University Stanislaus

Logging into *sharepointsps.calstate.edu*

**Warrior Sign In**

Warrior Username

Warrior Password

Sign In

Forgot your Warrior Username or Password?

**Warrior Identity Information**

Your Warrior Username is the first part of your University e-mail address, up to the "@" symbol. (ie. for JBond@csustan.edu, the Warrior Username is "JBOND").

Your Password is initially set at the "Initial" Sign In page that you received from Admissions, or you can reset your Password.

**Need Help?**

Documentation for [Students](#), [Faculty](#), or [Staff](#).

You can also contact the OIT Help Desk for assistance, 667-3687

**Additional Resources**

[Blackboard](#) [Data Warehouse](#) [Digital Measures](#) [Student E-mail](#) [Faculty/Staff E-mail](#) [Finance System](#) [Lynda.com](#) [Qualtrics](#)

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.**

**CSYOU**

EMPLOYEE RESOURCES TOOLS & SERVICES DIVISIONS & ORGANIZATIONS PROJECTS & INITIATIVES COLLABORATE POLICIES FORMS NEWS & COMMUNICATIONS

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

Common Financial System (CFS)

CFS Non-Production

CFS Login

CFS Data Warehouse Login - 10G

CFS Data Warehouse Login - 11G

CPO Process

Common Financial System (CFS)

CFS Production Log-in

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](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.**

Maintain Requisitions  
 Requisition

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

Requisition Name: \_\_\_\_\_ Copy From       Hold From Further Processing

Header

\*Requester: \_\_\_\_\_  
 \*Requisition Date: 04/08/2014      Requester Info  
 Origin: ONL      Online Entry  
 \*Currency Code: USD      Dollar  
 Accounting Date: 04/08/2014

Requisition Defaults      Add Comments      Amount Summary

Requisition Activities      Total Amount: 0.00 USD

Add Items From

Purchasing Kit      Catalog  
 Item Search      Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

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

Save    Notify    Refresh      Add    Update/Display

10. Select the Requisition Defaults link



**Requisition Defaults**

Business Unit STCMP      Requisition Date 04/07/2014  
 Requisition ID 0000002512      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 EA  
 Supplier 0000000553      Dell Marketing LP      Supplier Location 001  
 Category 20400      Supplier Lookup

Schedule

Ship To STANMAIN      CSU Stanislaus Main Campus      \*Distribute By Quantity  
 Due Date 05/31/2014      \*Liquidate By Quantity  
 Ultimate Use Code [ ]  
 Attention To [ ]

Distribution

SpeedChart [ ]

Distributions      Personalize | Find | View All | First 1 of 1 Last

Details

Dist	Percent	GL Unit	Fund	Dept	Program	Class	Project	Budget Date	Location	Business Unit
1		STCM	G0106	99999				04/07/2014	STANMSR29	

OK    Cancel    Refresh

- 11. Review the Chartfield string
- 12. Click the Cancel button.

Maintain Requisitions

**Requisition**

Business Unit STCMP      Status Open  
 Requisition ID 0000002512      Budget Status Not Chkd  
 Requisition Name 0000002512      Hold From Further Processing

Header

\*Requester 9000000999      Requester  
 \*Requisition Date 04/07/2014      Requester Info  
 Origin ONL      Online Entry  
 \*Currency Code USD      Dollar  
 Accounting Date 04/07/2014

Requisition Defaults      Edit Comments  
 Requisition Activities  
 Document Status

Amount Summary ?  
 Total Amount 950.00 USD

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

Search for Lines  
 Line [ ] To [ ]      Retrieve

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

View Printable Version      Delete Requisition      \*Go to ...More...  
 Save    Return to Search    Previous in List    Next in List    Notify    Refresh    Add    Update

- 13. Click on the Edit Comments link.



**Header Comments**

Business Unit STCMP      Requisition Date 04/07/2014  
 Requisition ID 0000002512      Status Open

Retrieve Active Comments Only     

\*Sort Method       \*Sort Sequence      

Comments      Find | View All      First 1 of 1 Last

Use Standard Comments      Comment Status Active     

Training Document

Send to Supplier       Show at Receipt  
 Show at Voucher

Associated Document

Attachment                         Email

From -> REQ STCMP-0000002512

- 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.

Maintain Requisitions

**Requisition**

Business Unit STCMP      Status Open       X  
 Requisition ID 0000002512      Budget Status Not Chkd  
 Requisition Name 0000002512       Hold From Further Processing

Header

\*Requester 9000000999      Requester  
 \*Requisition Date 04/07/2014      Requester Info  
 Origin ONL      Online Entry  
 \*Currency Code USD      Dollar  
 Accounting Date 04/07/2014

Requisition Defaults      Edit Comments      Amount Summary  
 Requisition Activities      Document Status      Total Amount 950.00 USD

Add Items From      Select Lines To Display


Purchasing Kit      Catalog      Search for Lines  
 Item Search      Requester Items      Line      To      Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open	<input type="button" value="Schedule"/>	<input type="button" value="Add"/>	<input type="button" value="Delete"/>

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

**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 



Maintain Requisitions

**Schedule**

Business Unit STCMP      Requisition Date 04/07/2014  
 Requisition ID 0000002512      Status Open

[Return to Main Page](#)

Line	Item	Laptop	Quantity	1.0000	Each	Merchandise Amt	950.00 USD																
<p>Schedule      Personalize   Find   View All   [Print]   First 1 of 1   Last</p> <p>Details [PDF]</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>STANM</td> <td>1.0000</td> <td>950.00000</td> <td>950.00</td> <td>05/31/2014</td> <td>Sather,Bernade</td> <td>Active</td> </tr> </tbody> </table>								Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	STANM	1.0000	950.00000	950.00	05/31/2014	Sather,Bernade	Active
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status																
1	STANM	1.0000	950.00000	950.00	05/31/2014	Sather,Bernade	Active																

Add Ship To Comments

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

20. Select the Distribution



Maintain Requisitions

**Distribution**

Requisition ID 0000002512      Item Laptop

Line 1      Status Active

Schedule 1

Ship To STANMAIN      Stan Main      Quantity 1.0000 EA

\*Distribute By Quantity      Open Quantity 1.0000

\*Liquidate By Quantity      Merchandise Amt 950.00 USD

SpeedChart Multi-SpeedCharts

Distrib	Status	Percent	Quantity	Merchandise Amount	Account	Fund	Dept	Program	Project	*Location
1	Open	50.0000	0.5000	475.00	619804	G0106	99999			STANMSR29
2	Open	50.0000	0.5000	475.00	660003	G0106	99999			STANMSR29

OK    Cancel    Refresh

21. Review the split funding sources

22. Click OK to return to the Schedule information.

Maintain Requisitions

**Schedule**

Business Unit STCMP      Requisition Date 04/07/2014  
 Requisition ID 0000002512      Status Open

[Return to Main Page](#)

Line	Item	Laptop	Quantity	1.0000	Each	Merchandise Amt	950.00 USD																
<p>Schedule      Personalize   Find   View All   [Print]   First 1 of 1   Last</p> <p>Details [PDF]</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>STANM</td> <td>1.0000</td> <td>950.00000</td> <td>950.00</td> <td>05/31/2014</td> <td>Sather,Bernade</td> <td>Active</td> </tr> </tbody> </table>								Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	STANM	1.0000	950.00000	950.00	05/31/2014	Sather,Bernade	Active
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status																
1	STANM	1.0000	950.00000	950.00	05/31/2014	Sather,Bernade	Active																

Add Ship To Comments

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

23. Select the Return to Main Page link



Maintain Requisitions  
Requisition

Business Unit STCMP  
Requisition ID 0000002512  
Requisition Name 0000002512

Status Open  
Budget Status Not Chk'd

Header

\*Requester 9000000999 Requester  
\*Requisition Date 04/07/2014 Requisition Info  
Origin ONL Online Entry  
\*Currency Code USD Dollar  
Accounting Date 04/07/2014

Requisition Defaults  
Requisition Activities  
Document Status

Amount Summary  
Total Amount 950.00 USD

Add Items From  
Purchasing Kit  
Item Search  
Catalog  
Requester Items

Select Lines To Display  
Search for Lines  
Line To Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

View Printable Version  
Delete Requisition \*Go to ...More...

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

24. Select the Requisition Activities link.

Activities

Business Unit STCMP  
Requisition ID 0000002512

Requisition Date 04/07/2014  
Status Open

Requisition Activities  
Personalize | Find | First 1-2 of 2 Last

Done	*Due Date	*SeqNum	Comments
<input type="checkbox"/>	04/17/2014	1	Sent to Reviewer1 - REQ
<input type="checkbox"/>	04/17/2014	2	

OK Cancel Refresh

25. Enter your comment, including your initials or name.  
*Sample Comment: Reviewed and forwarded. REV*

26. Click OK button

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

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 receipt feature the requisition will appear in the recipient'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

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

To: Reviewer2 / 9000000997 Delivery Options

CC:

BCC:

Priority: 2-Med  RichText

Subject: Requisition #0000002512 - Please see Item (1) below

Template: Requisition Notification for STCMP #0000002512. Detail messages are listed below.

1 - This is a request to approve the Requisition

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.

OK Cancel Apply

Send Notification

Lookup Address

Recipient Search

Name:

Search Results Personalize | Find | View All | First 1-2 of 2 Last

To	cc	bcc	Recipient	Email Address	User ID
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reviewer1	reviewer1@csustan.edu	90000000998
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reviewer2	reviewer2@csustan.edu	90000000997

Add to Recipient List

Recipient List

To: Reviewer2 / 9000000997

CC:

BCC:

OK Cancel





**ORACLE**

**CFS 9.2**  
**Purchasing**