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, log in thru the portal link below:

https://portal.calstate.edu/

***Click the below link to view the Requisition page***

https://cfs.calstate.edu/pss/CC5SPRD/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?
Page=PT_WF_NOTIFY&Action=U&BUSINESS_UNIT-SCMP&REQ_ID=00000004D8

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.
29. Enter the individual's email in the To: field or click the Lookup Recipient link.

**NOTE:** If you use the lookup recipient 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.