

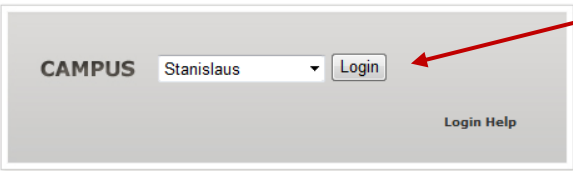


Review Requisitions

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.

<p>Purchasing > Requisition > Add/Update Requisitions</p>	
<p>If you are not already signed in to CFS PeopleSoft, login using this link</p> <p>https://ds.calstate.edu/?svc=cfs  Click this link first to log into CFS.</p> <p>***Click the below link to view the Requisition page***</p> <p>https://cfs.calstate.edu/psp/FCFSPRD/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=PT_WF_NOTIFY&Action=U&BUSINESS_UNIT=STCMP&REQ_ID=0000004720</p>	<p>1. An email will be received for each requisition that needs to be reviewed and/or approved.</p> <p>You must be signed into CFS PeopleSoft before clicking the requisition link. Click the first link in the email to log into CFS.</p>

	
	<p>2. Select Stanislaus from the drop down menu, then click Login</p>

STUDENTS PARENTS FACULTY/STAFF ALUMNI DONORS COMMUNITY

California State University Stanislaus

Logging into *sharepointps.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

3. Enter a User ID
4. Enter a Password
5. 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)

Libraries

CFS Non-Production

CFS Login

CFS Data Warehouse Login - 11G

CPO Process

Common Financial System (CFS)

The Common Financial System, referred to systemwide as the CFS, replaced the California State University Peoplesoft Finance 9.0 environment in July 2011. CFS was instituted in an effort to achieve database consolidation across all campuses.

Announcements

Please utilize the CFS 9.2 and Data Warehouse 11G Training materials available in the links provided below.

CFS 9.2 Training

[CFS 9.2 Training and Tips \(.doc\)](#)

[CO Budgeting Business Process 9.2 \(.doc\)](#)

[Pro Card Training Manual PS 9.2 \(.doc\)](#)

CFS Production Log-in

Systemwide Technical Support

Requests for assistance begin by contacting the IT Support Center by email or by telephone (562) 951-8500.

Requests are routed to technology service providers 24 hours a day, 7 days a week, 365 days a year.

Open a Ticket

[Open a ticket using ServiceNow](#)

6. 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 CFS PeopleSoft, login using this link
<https://ds.calstate.edu/?svc=cfs>

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=0000004720

Click this link after logging into CFS.

7. Navigate back to your original email

8. Click on the link

NOTE: You will be directed to the requisition page.

Maintain Requisitions

Requisition

Business Unit STCMP
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chkd
Hold From Further Processing

Header

*Requester 90000000999
*Requisition Date 04/07/2014
Origin ONL
*Currency Code USD
Accounting Date 04/07/2014

Requester
Requester Info
Online Entry
Dollar

Requisition Defaults
Requisition Activities
Document Status

Amount Summary
Total Amount 950.00 USD

Add Items From
Purchasing Kit
Item Search

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

9. 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 Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate +

Training Document

Send to Supplier Show at Receipt

Show at Voucher

Associated Document

Attachment Attach View Delete Email


From -> REQ STCMP-0000002512

OK Cancel Refresh

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

11. Review the comments listed.

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

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

13. Type a justification.

14. 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

*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 Total Amount 950.00 USD

Add Items From Select Lines To Display

Purchasing Kit Catalog Search for Lines

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... Add Updated

15. 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 1 Item Laptop Quantity 1.0000 Each Merchandise Amt 950.00 USD


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

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

16. Select the Distribution icon



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

Distributions Personalize | Find | View All | First 1-2 of 2 | Last

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

17. Review the Chartfield string
18. 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 1 Item Laptop Quantity 1.0000 Each Merchandise Amt 950.00 USD

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

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

19. Select the Return to Main Page link

Maintain Requisitions

Requisition

Business Unit STCMP Status Open ✘
 Requisition ID 0000002512 Budget Status Not Chk'd
 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 **Requisition Activities** Amount Summary
 Document Status 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	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

20. Select the Requisition Activities link.

Activities

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

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

22. Click OK button

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

23. Click the Save button

24. 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

To: Reviewer2 / 90000000997

CC:

BCC:

Priority: 2-Med

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
2 - This is a request to enter...

Message:

Lookup Recipient

Delivery Options

RichText

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

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

25. Enter the individuals email in the To: field or
Click the Lookup Recipient link (if you use lookup you must enter last name in lookup box, click search, check box next to name, then click add recipient button).

**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.

Send Notification

Lookup Address

Recipient Search

Name: Revi

Search

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 / 90000000997

CC:

BCC:

OK Cancel

26. Select the priority level from the drop down menu
27. Type your message

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

MULTI-YEAR APPROVALS:
Approvers must state that the req. is approved as a multi-year requisition (State "MYR" and then your comments at step 21 above).

28. Click the OK button