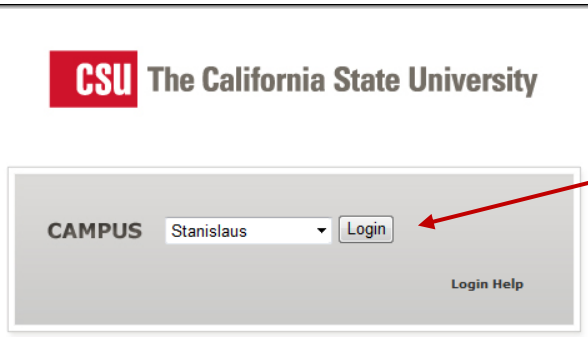
Review Requisitions

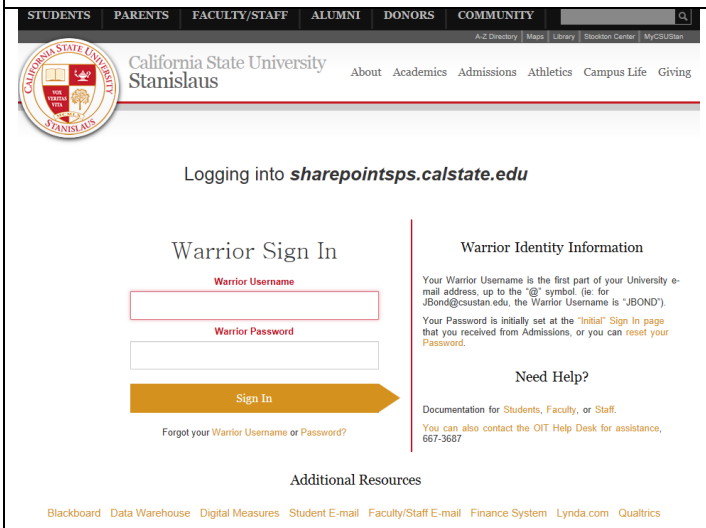
This guide outlines the process to review a requisition. A Requisition is a request for goods or services for use by your department. The approval process for requisitions is a 3-tier system; The Requestor who enters the requisition, the Reviewer who reviews line items and expenditures, and the Approver 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. **You must be signed into CFS PeopleSoft before clicking the requisition link. Click the first link in the email to log into CFS.**

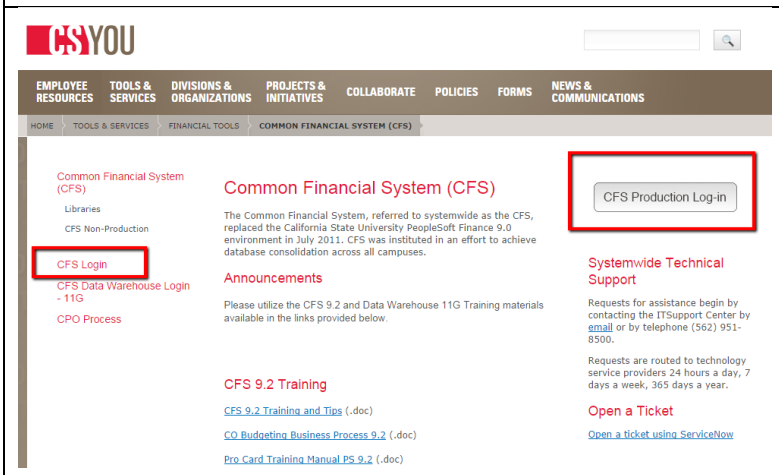


2. Select Stanislaus from the drop down menu, then click Login



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.

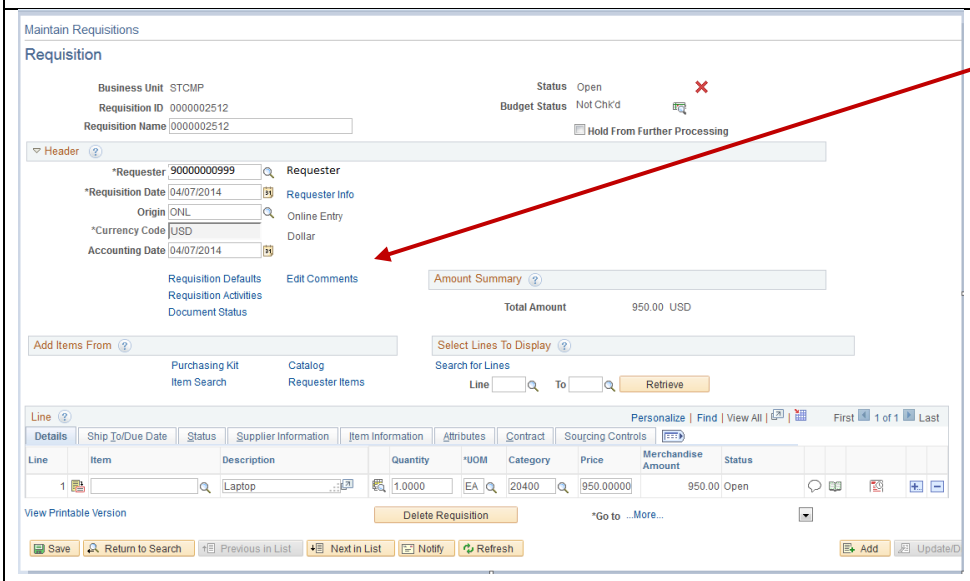


6. Select CFS Login from the list on the left or click the CFS Production Log-in button on the right.

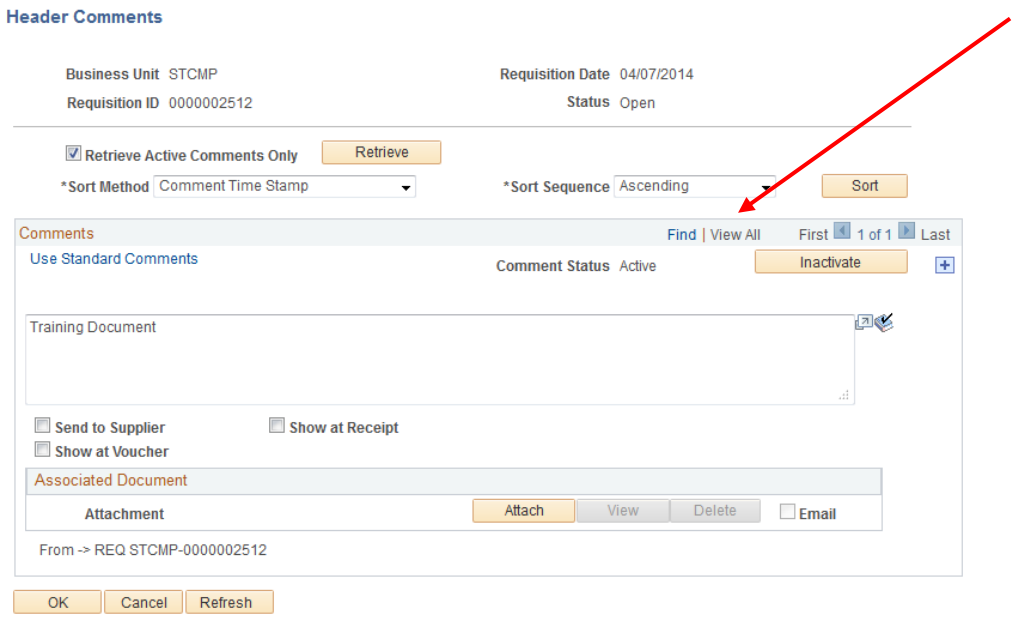
7. Navigate back to your original email

8. Click on the link

NOTE: You will be directed to the requisition page.



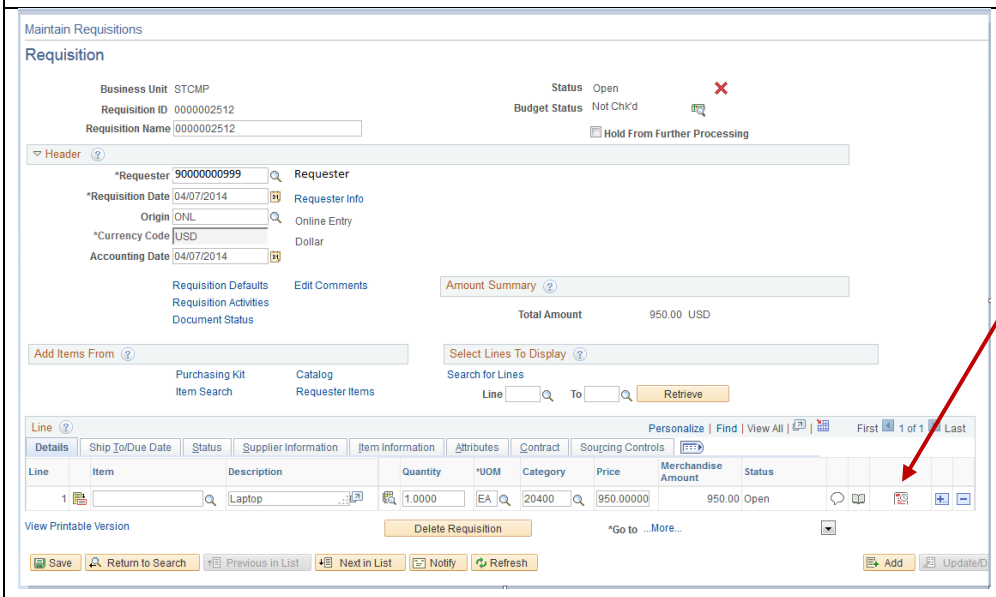
9. Click on the Edit Comments link.



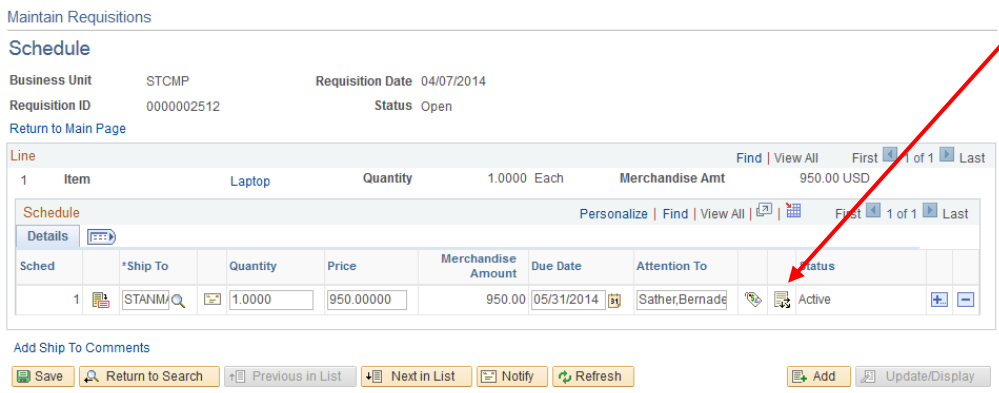
10. Click on View All; to view all the comments available.
11. Review the comments listed.

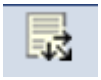
NOTE: If there are split funding sources, there will be a comment stating such. Refer to step 21.

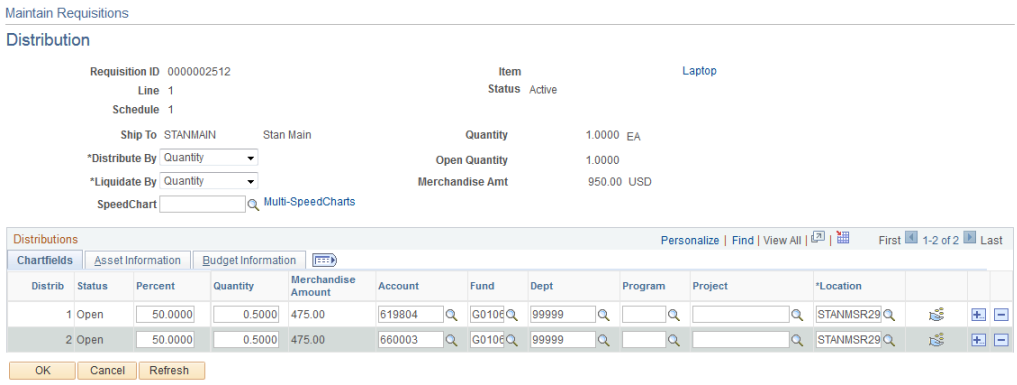
12. Click the Add a New Row icon to add a comment
13. Type a justification.
14. Click the OK button.



15. Select the Schedule icon

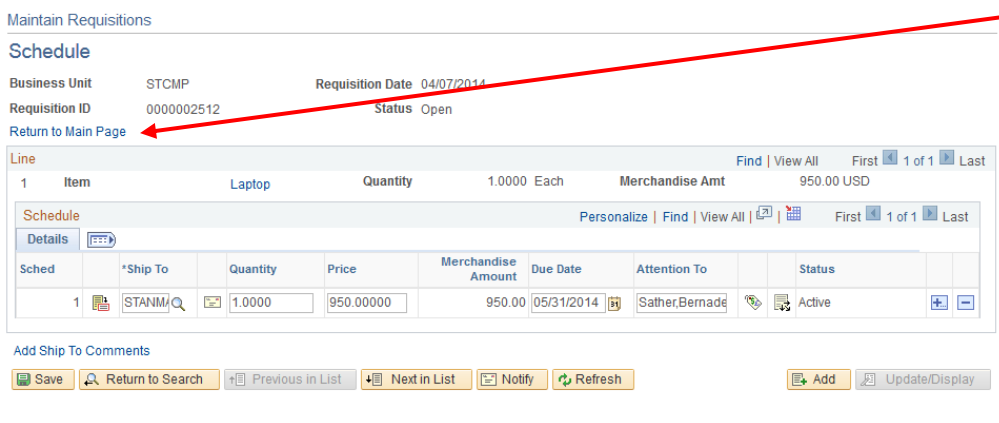


16. Select the Distribution icon 

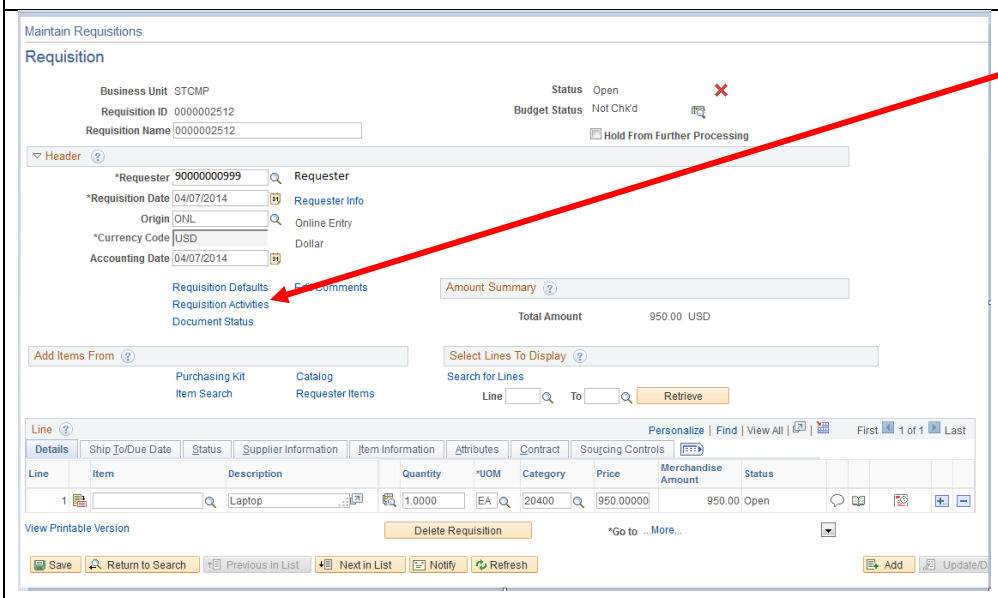


17. Review the Chartfield string

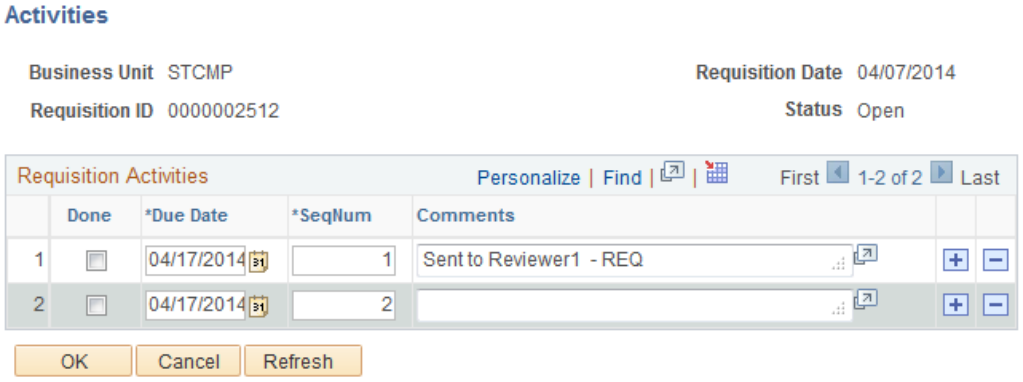
18. Click OK to return to the Schedule information.



19. Select the Return to Main Page link



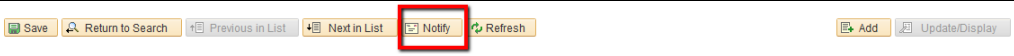
20. Select the Requisition Activities link.



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

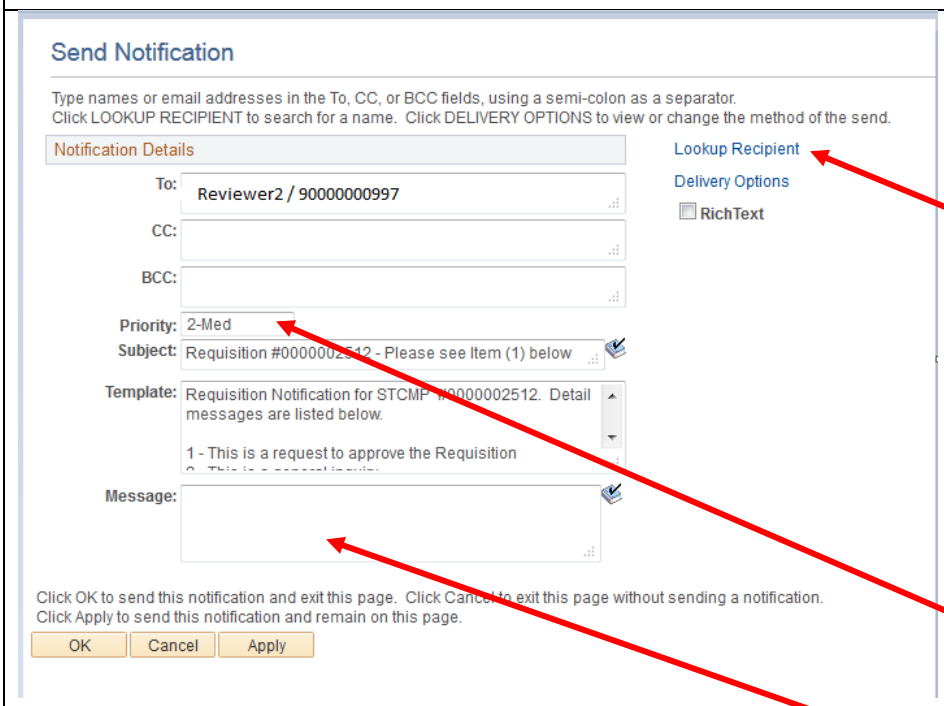
Sample Comment: Reviewed and forwarded. REV

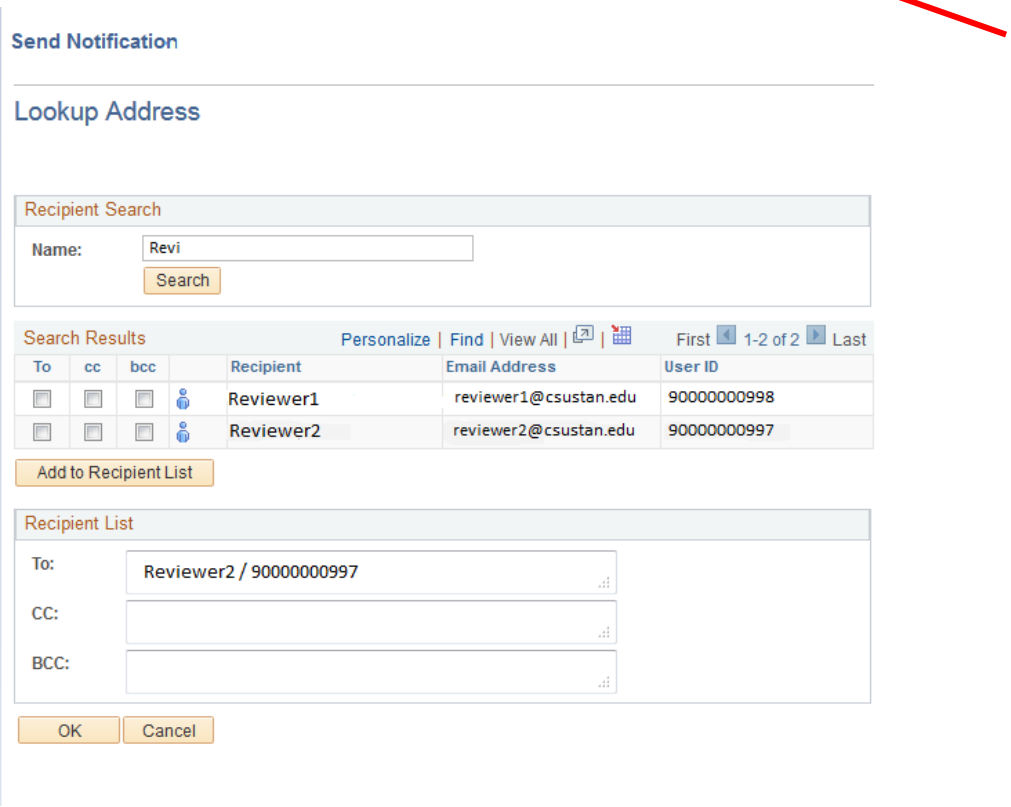
22. Click OK button



23. Click the Save button

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





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.

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