

# CFS

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## Requisition Process User Guide

**Contact Us:**

web      [www.csus.edu/irt/acs/reference/cfs/index.html](http://www.csus.edu/irt/acs/reference/cfs/index.html)

phone                      (916) 278-7337 Service Desk

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## Overview

CFS allows on-line entry of requisitions by end-users. Line items and the appropriate chartstring information can be entered. Some end users will have the authority to approve requisitions depending on their security. Approval by a manager or supervisor may be required.

This manual will show you how to:

- Create and Modify Requisitions
- Add an Attachment to a Requisition
- Delete or Cancel Unapproved Requisitions
- Review Requisition Information
- Print a Copy of the Purchase Order
- Customize a Screen
- CSU PO Life Cycle Report
- Buyer Look Up



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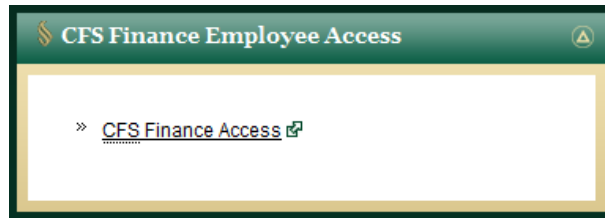
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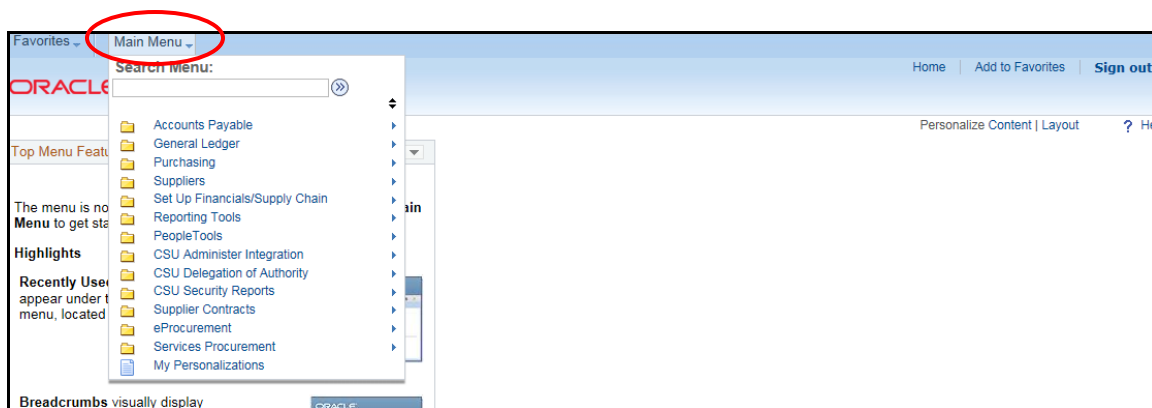
## Section 1 Create Requisitions using Requisition Defaults

When creating a requisition with multiple lines using the same Chartstring information, it is best to enter Requisitions using the requisition defaults. Setting the defaults before entering each line will save time and reduce errors.

1. Log in to My Sac State with your SacLink user name and Password.
2. From the Staff Services page, click on the **CFS Finance Access** link.



3. The Oracle/PeopleSoft menu page will display in a new browser window. Select the Main Menu option at the top of the screen.



### Navigation: Purchasing > Requisitions > Add/Update Requisitions

4. The **Add a New Value** screen will display. The business unit will default to **SACST** and the Requisition ID will default to **NEXT**.
5. Click the **Add** button.

The Maintain Requisitions screen will display.

Maintain Requisitions

Requisition

Business Unit SACST  
 Requisition ID NEXT  
 Requisition Name  Copy From   Hold From Further Processing

Status Open   
 Budget Status Not Chk'd

Header ?

\*Requester    
 \*Requisition Date 03/10/2014  Requester Info  
 Origin ONL  On-Line Entry  
 \*Currency Code USD Dollar  
 Accounting Date 03/10/2014

Requisition Defaults  Amount Summary ?  
 Requisition Activities

Total Amount 0.00 USD

Add Items From ?  
 Purchasing Kit Catalog  
 Item Search Requester Items

Line ?

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls Personalize Find View All  First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	Open

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

- On the Maintain Requisitions screen, the **Status:** displays “Open” and **Budget Status:** is “Not Chk’d”.
- The **Requester** field will default according to your log in information or security settings. If it does not, click on the search icon to select a Requester from your list of available requesters
- Click the **Requisition Defaults** link shown above.

Look Up Requester

Requester:  begins with

Search Results

View 100 First 1-2 of 2 Last

Requester	Description
60000001106	IRT
60000002106	TRAVEL_IRT

The **Requisition Defaults** screen, shown below, is used to select the supplier and to enter default Chartstring information.

**Requisition Defaults**

Business Unit SACST Requisition Date 03/10/2014  
 Requisition ID NEXT 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 [ ] [ ]  
 Supplier [ ] [ ] Supplier Location [ ] [ ]  
 Category [ ] [ ] Supplier Lookup

Schedule

Ship To CENT REC [ ] Central Receiving \*Distribute By Quantity [ ]  
 Due Date [ ] [ ] \*Liquidate By Amount [ ]  
 Ultimate Use Code [ ] [ ]  
 Attention To [ ] [ ]

Distribution

SpeedChart [ ] [ ]

Distributions

Details Asset Information [ ] [ ]

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Product	Project
1	[ ]	SACS [ ]	[ ] [ ]	[ ] [ ]	[ ] [ ]	42300 [ ]	[ ] [ ]	[ ] [ ]	[ ] [ ]	[ ] [ ]	[ ] [ ]

OK Cancel Refresh

9. The **Default Options** will automatically be set to the **Default** option. Select **Override** and manually enter the chartstring.

**Note:** This has to be done every time you create a requisition, especially if you are using multiple DeptID's.

10. Select a supplier by clicking the search icon next to the **Supplier** field (previously known as "Vendor") to obtain a list of available suppliers. You can search by Supplier ID or by Short Supplier Name. **If the desired supplier is not in the list, leave this field blank and note the supplier name, address and other related information in the Comments section.**
11. The **Distribute By** field will default to **Quantity**. Leave as is if the requisition is for a commodity. Change it to **Amount** if the requisition is for a service.
12. The **Distributions** section will default to the **Details** tab. Fill in the required Chartstring information in the designated fields as follows:
- **Account** – Enter the account number or click the search icon to select an account from the list.
  - **Fund** – Enter the fund or click the search icon to select a fund from the list.
  - **Dept** – The department ID number will default based on the requester information.


- **Location** – This field will default based on the requester information.

**NOTE:** The “Location” in this section designates where Receiving will deliver the product.

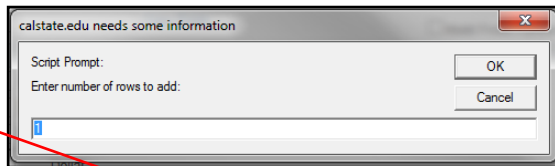
13. After entering all Chartstring information, click the **OK** button.

The **Maintain Requisition** screen will display again. The next step is to enter the details for each line item.

The **Line** section of the screen will default to the Details Tab. You can add additional lines to the requisition using the same default Chartstring information.

14. To add a line to the same requisition, click the add a row icon at the end of the first line item. 


15. When prompted, enter the number of rows you wish to add and click the **OK** button.



Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1		#200-01450 adult	6.0000	EA	57800	90.00000	540.00	Open				
2		#231-01350 kid and	1.0000	EA	57800	80.00000	80.00	Open				
3		shipping and handling	1.0000	DLF	96200	20.00000	20.00	Open				

16. For each line, complete the following fields:

**Item:** Do not use this field. It is recommended that you customize this page and hide this field. See Section 10 of this document for instructions on customization.

**Description:** Enter the description of the product or service. If you need to add more information than this field will accommodate, use the Line Comments icon. 

**Quantity:** Enter the quantity of the product. If it is a service, enter “1”.

**UMO:** Enter the Unit of Measure. Select **EA** for all commodities (57800) or **DLR** (96200) for all services.

**Category:** Enter **57800** for miscellaneous products or **96200** for miscellaneous services.

**Price:** Enter the unit **Price**.



## 1.1 Adding Comments to a Requisition

You can add comments to a requisition for Procurement or Vendor. The Maintain Requisitions screen provides two ways to enter comments.

To add a comment click on the **Add Comments** link on the Requisition screen. This comment will apply to the entire requisition.

The screenshot displays the 'Maintain Requisitions' interface. At the top, it shows 'Business Unit SACST', 'Requisition ID NEXT', and 'Requisition Name' with a 'Copy From' button. The status is 'Open' (checked) and 'Budget Status Not Chk'd'. There is a checkbox for 'Hold From Further Processing'. Below this is a 'Header' section with fields for '\*Requester' (60000001106), '\*Requisition Date' (03/10/2014), 'Origin' (ONL), '\*Currency Code' (USD), and 'Accounting Date' (03/10/2014). A red circle highlights the 'Add Comments' link. To the right, an 'Amount Summary' shows 'Total Amount 640.00 USD'. At the bottom, there are links for 'Add Items From', 'Purchasing Kit', 'Catalog', 'Item Search', and 'Requester Items'.

The **Header Comments** page will display.

1. Enter your comments in the text field. The spell check icon can be used to run a spell check on your entry.
2. Select the **Send to Supplier**, **Show at Receipt** and **Shown at Voucher** check boxes. This will insure the comments are printed on the requisition and receipt. If you do not select these options your comment will not be seen.
3. To enter a comment using the pre-defined comments section, click the **Use Standard Comments** link.

**Header Comments**

Business Unit SACST Requisition Date 03/10/2014  
 Requisition ID NEXT Status Open

\*Sort Method  \*Sort Sequence

**Comments** Find | View All First 1 of 1 Last  
 Use Standard Comments **3** Comment Status Active

**1**

**2**  Send to Supplier  Show at Receipt  
 Show at Voucher

**Associated Document**  
 Attachment     Email

From -> REQ SACST-NEXT

4. From the standard comments window, enter REQ in the **Comment Type** field.
5. In the **Comment ID** field, click the search icon and select from the search results list.
6. The standard comment will populate in the Comments textbox.
7. Click the **OK** button to continue.

**Standard Comments**

**Comments** \*Action

\*Effective Date 03/10/2014 \*Status

Description   
 Short Desc

Comments

**NOTE:** Once comments are entered into the comments field, the comments link on the Requisition screen will change to **“Edit Comments”**.

[Requisition Defaults](#)  [Requisition Activities](#)



The comment icon will change indicating that a line comment has been entered into the system.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	Comments
1		Pens	10.0000	BO	57800	2.00000	20.00	Open	[Comment Icon]
2		Pencils	10.0000	BO	57800	3.00000	30.00	Open	[Comment Icon]
3		Project Folders	20,000.0000	BO	57800	12.00000	240,000.00	Open	[Comment Icon]
4		Post It Note Pads	10.0000	PKC	57800	8.95000	89.50	Open	[Comment Icon]
5		Labels	3.0000	BO	57800	25.99000	77.97	Open	[Comment Icon]

### 1.3 Assigning a Requisition ID

After entering all the necessary chartstring information and line information on the Maintain Requisitions page, click the Save button.



**Business Unit** SACST  
**Requisition ID** 3000015162  
**Requisition Name** 3000015162

**Status** Open   
**Budget Status** Not Chkd

**Header**  
 \*Requester 60000001106 IRT  
 \*Requisition Date 03/10/2014  
 Origin ONL On-Line Entry  
 \*Currency Code USD Dollar  
 Accounting Date 02/10/2014

**Amount Summary**  
 Total Amount 240,217.47 USD

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Pens	10.0000	BO	57800	2.00000	20.00	Open
2		Pencils	10.0000	BO	57800	3.00000	30.00	Open
3		Project Folders	20,000.0000	BO	57800	12.00000	240,000.00	Open
4		Post It Note Pads	10.0000	PKC	57800	8.95000	89.50	Open
5		Labels	3.0000	BO	57800	25.99000	77.97	Open

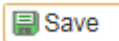
**Save** **Notify** **Refresh**

The Requisition ID will change from NEXT to an assigned **Requisition ID** number. Record this number so that you will have it available for other functions in the requisition process. At this point the requisition is ready to be approved.

If you do not have approver status, notify the person in your department responsible for approving requisitions and supply them with the Requisition ID number.

If you have approver status, click the green checkbox to approve the requisition.

After approving, click the Save button.



**NOTE:** All requisitions will be Budget Checked nightly.

## Section 2 Uploading an Attachment to a Requisition

Navigation: Purchasing > Requisitions > Add/Update Requisitions

1. The **Add a New Value** screen will display. The business unit will default to SACST and the Requisition ID will default to NEXT. Use these settings.
2. Click the **Add** button to create a new requisition. (Or select the Find an Existing Value tab to search for an existing requisition.)

The screenshot shows the 'Requisitions' interface with two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. Below the tabs, there are two input fields: 'Business Unit' with the value 'SACST' and a search icon, and 'Requisition ID' with the value 'NEXT'. At the bottom of the form is an orange 'Add' button.

The **Maintain Requisitions** screen will display.

3. Click the **Add Comments** link to add an attachment.

The screenshot shows the 'Maintain Requisitions' screen. At the top, it says 'Requisition' with details: Business Unit: SACST, Requisition ID: NEXT, and Requisition Name: [empty]. Status is 'Open' (checked), Budget Status is 'Not Chk'd', and there is a 'Hold From Further Processing' checkbox. Below this is a 'Header' section with fields for \*Requester (60000001106), \*Requisition Date (03/10/2014), Origin (ONL), \*Currency Code (USD), and Accounting Date (03/10/2014). There are links for 'Requester Info', 'On-Line Entry', 'Dollar', 'Requisition Defaults', and 'Requisition Activities'. The 'Add Comments' link is circled in red. To the right is an 'Amount Summary' section showing 'Total Amount' as 640.00 USD. At the bottom, there is an 'Add Items From' section with links for 'Purchasing Kit', 'Item Search', 'Catalog', and 'Requester Items'.

4. Type "**Document Attached**" in the Comments box so the Buyer knows the requisition has an attachment.
5. Click the three available checkboxes: **Send to Vendor**, **Shown at Receipt**, and **Shown at Voucher**.
6. Click the **Attach** button below the checkboxes.

**Header Comments**

Business Unit SACST      Requisition Date 03/10/2014  
Requisition ID 3000015162      Status Approved

\*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 +

Document Attached  
Contact Leah 8-7810 for any questions

Send to Supplier       Show at Receipt  
 Show at Voucher

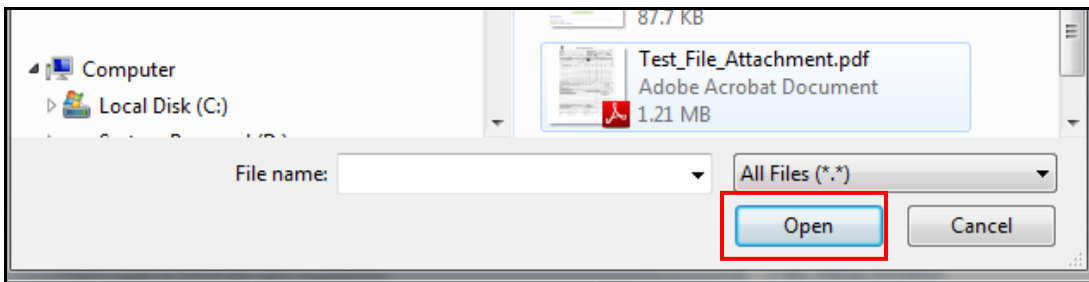
**Associated Document**

Attachment      **Attach**      View      Delete      Email

From -> REQ SACST-3000015162

OK      Cancel      Refresh

- 7. After clicking the Attach button, select the “Choose File” or “Browse” option.
- 8. Find the location of the document you wish to attach and click the file name to select it.



- 9. Click the **Open** button.

**File Attachment**      Help

C:\Users\palmert\Desktop\Test\_File\_Attachment.pdf      Browse...

**Upload**      Cancel

- 10. Click the **Upload** button.

The screenshot shows a 'Comments' window with the following elements:

- Header: 'Comments', 'Find | View All', 'First 1 of 1 Last', 'Comment Status Active', 'Inactivate' button.
- Text area: 'Document Attached', 'Contact Leah 8-7810 for any questions'.
- Checkboxes:  Send to Supplier,  Show at Receipt,  Show at Voucher.
- Section: 'Associated Document'.
- Table:
 

Attachment	Test_File_Attachment.pdf	Attach	View	Delete	Email
From -> REQ SACST-3000015162					
- Buttons: OK, Cancel, Refresh.

Your document has now been uploaded (attached) to the requisition.

The “View” button is now active and yellow.

**NOTE:** If your purchase includes technology products or services, an Electronic and Information Technology (E&IT) request must be submitted and an E&IT email approval **MUST** be attached to your requisition. Please visit <http://www.csus.edu/accessibility/services/procure.html> for instructions on what products are considered “E&IT” and how to submit a

**Note:** ONLY one (1) document (file) may be uploaded per comment box. If you have multiple documents to attach, click the plus (+) sign to generate a new comment and add an additional document.

11. Click the OK button to return and complete the rest of your requisition processing.

### Section 3 Creating a Requisition by Line

When entering a requisition using more than one chartstring you must enter distribution information **by line**.

**Navigation: Purchasing > Requisitions > Add/Update Requisitions**


1. The **Add a New Value** screen will display. The business unit will default to SACST and the Requisition ID will default to NEXT. Use these settings.
2. Click the **Add** button.

The **Maintain Requisitions** screen will display.

The screenshot shows the 'Requisitions' screen with the following elements:

- Buttons: 'Find an Existing Value', 'Add a New Value'.
- Input fields: 'Business Unit: SACST', 'Requisition ID: NEXT'.
- Button: 'Add'.

3. Enter a Requester in the **Requester** field.
4. Click the Requisition Defaults link.
  - **Item:** Leave this field blank or customize your page to hide this field. See Section 9 in this manual for information on how to customize.
  - **Description:** Enter the description of the product or service. If you need to add more information than this field will accommodate, use the Add Comments link.
  - **Quantity:** Enter the quantity of the product. If it is a service, enter “1”.
  - **UOM:** Enter the Unit of Measure. Select **EA** for all commodities (57800) or **DLR** (96200) for all services.
  - **Category:** Enter **57800** for miscellaneous products or **96200** for miscellaneous services.
  - **Price:** Enter the unit **Price**.

5. Select the **Schedule Requisition** icon  in the line item to bring up the **Schedule** page.



Maintain Requisitions

### Schedule

Business Unit SACST Requisition Date 03/10/2014  
 Requisition ID 3000015162 Status Approved  
[Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amt	Due Date	Attention To	Status
1	Chairs	2.0000 Each	50.00000	100.00 USD		IRT	Active

6. From the Schedule page, click the **Distribution** icon to add Chart string information.



Maintain Requisitions

### Distribution

Requisition ID 3000015162 Item Chairs  
 Line 1 Status Active  
 Schedule 1

Ship To CENT REC Cent Rec Quantity 2.0000 EA  
 \*Distribute By Quantity Open Quantity 2.0000  
 \*Liquidate By Amount Merchandise Amt 100.00 USD  
 SpeedChart Multi-SpeedCharts

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class
1	Open	100.0000	2.0000	100.00	SACS	660003		MDS01	42300		

7. In the lower portion of the Distribution screen make sure the **chartfields** tab is selected. Fill in the chartstring information as follows:

- **Account:** This field will default based on the Category ID.
- **Fund:** Enter the appropriate Fund or click the search icon to select a Fund from the list.
- **Dept:** The Department ID will default based on the Requester.

**NOTE:** Locations on this field designates where Central Receiving will deliver the product.

8. Click the **OK** button to return to the Schedule page.

9. Click on the **Return to Main Page** link to return to the Maintain Requisitions page.

Maintain Requisitions  
**Requisition**  
 Business Unit SACST      Status Approved  
 Requisition ID 3000015162      Budget Status Not Chk'd  
 Requisition Name 3000015162       Hold From Further Processing

▼ Header ?

\*Requester 60000001106 IRT  
 \*Requisition Date 03/10/2014 Requester Info  
 Origin ONL On-Line Entry  
 \*Currency Code USD Dollar  
 Accounting Date 02/10/2014

Requisition Defaults      Edit Comments  
 Requisition Activities

Amount Summary ?  
 Total Amount 240,297.47 USD

Add Items From ?  
 Purchasing Kit      Catalog  
 Item Search      Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Chairs	2.0000	EA	57800	50.00000	100.00	Approved

View Printable Version      Delete Requisition      \*Go to ... More...  
 Save      Notify      Refresh      Add      Update/Display

To add a line(s), click on the **Add** icon.



When prompted indicate the number of lines to be added and click the **OK** button.

calstate.edu needs some information

Script Prompt:  
 Enter number of rows to add:

1

OK      Cancel

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Chairs	2.0000	EA	57800	50.00000	100.00	Approved
2		Table	1.0000	EA	57800	200.00000	200.00	Approved

For each additional line item repeat the steps outlined above.

**Add Comments**

To add Header Comments or Line Comments follow the procedures previously outlined in Sections 1.1 and 1.2 of this manual.

## Section 4 Deleting a Requisition or Requisition Line

Conditions for deleting a line or distribution line:

- A line or distribution line **cannot** be deleted from a requisition if it has been “**Approved.**”

**NOTE:** *When the requisition has been Approved or budget checked, the appropriate buyer **must** be notified to cancel a requisition.*

- There must be more than one line in order to delete it from a requisition.
- If you attempt to delete a single line you will receive an error message saying: “Cannot delete first line on requisition”.

**Navigation: Purchasing > Requisitions > Add/Update Requisitions**

### 4.1 Delete a Requisition Line

You can delete a Requisition Line as long as the requisition has not yet been approved.

1. Click the **Find an Existing Value** tab.
2. Enter the desired **Requisition number** in the Requisition ID field.
3. Click the **Search** button.

**Requisitions**  
Use the following search to look for an existing Requisition.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Business Unit: [=] SACST

Requisition ID: [begins with] [ ]

Requisition Name: [begins with] [ ]

Requisition Status: [=] [ ]

Origin: [begins with] [ ]

Requester: [begins with] [ ]

Requester Name: [begins with] [ ]

Hold From Further Processing

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

The **Maintain Requisition** page will display.

Maintain Requisitions

**Requisition**

Business Unit SACST Status Open   
 Requisition ID 3000015162 Budget Status Not Chk'd   
 Requisition Name 3000015162  Hold From Further Processing

Header

\*Requester 60000001106 IRT  
 \*Requisition Date 03/10/2014 Requirer Info  
 Origin ONL On-Line Entry  
 \*Currency Code USD Dollar  
 Accounting Date 02/10/2014

Requisition Defaults Edit Comments  
 Requisition Activities

Amount Summary

Total Amount 240,217.47 USD

Add Items From

Purchasing Kit Catalog  
 Item Search Requirer Items

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Pens	10.0000	BO	57800	2.00000	20.00	Open
2		Pencils	10.0000	BO	57800	3.00000	30.00	Open

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

Save Notify Refresh Add Update/Display

4. Click the minus icon  next to the line you want to delete.

A confirmation dialog box will display.

5. Click the **OK** button.

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK Cancel

The **Maintain Requisition** page will re-display. The example below shows that the second line of the requisition has been deleted. Click the **Save** button at the bottom of the screen.

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Pens	10.0000	BO	57800	2.00000	20.00	Open

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

Save Notify Refresh Add Update/Display

## 4.2 Delete a Requisition

Deleting a requisition differs from cancelling a requisition. When a requisition is cancelled a record of it will remain in the system for future reference. When a requisition is deleted, it is completely deleted from the system.

A requisition can be deleted before it is saved or after it is saved and assigned a Requisition ID number however, it cannot be deleted if it has been approved or budget checked.

### Navigation: Purchasing > Requisitions > Add/Update Requisitions

1. Select the **Find an Existing Requisition** tab.
2. Enter the desired **Requisition ID** and click the **Search** button.
3. On the **Maintain Requisitions** page, click on the **Delete Requisition** button at the bottom of the screen or click the red X icon next to the requisition Status at the top of the page. Note in the example below, the requisition status is Open and it has not been approved.

The screenshot displays the 'Maintain Requisitions' interface. At the top, the 'Status' is 'Open' with a red 'X' icon next to it, which is circled in red. Below this, the 'Budget Status' is 'Not Checked' and there is a 'Hold From Further Processing' checkbox. The 'Requisition ID' is 3000015160 and the 'Requisition Name' is 3000015160. The 'Requester' is 60000001106 (IRT) and the 'Requisition Date' is 02/10/2014. The 'Origin' is ONL (On-Line Entry) and the 'Currency Code' is USD (Dollar). The 'Accounting Date' is 02/10/2014. The 'Total Amount' is 18,449.01 USD. The 'Add Items From' section includes 'Purchasing Kit', 'Catalog', 'Item Search', and 'Requester Items'. The 'Select Lines To Display' section has a 'Search for Lines' field and a 'Retrieve' button. The 'Line' table shows one line with 'Renewal Agreement -', quantity 1.0000, UOM EA, category 91900, price 18,449.01, and status Open. The 'Delete Requisition' button is highlighted with a red circle. The 'View Printable Version' link is also visible.

4. When the confirmation screen appears, click the **Yes** button.
5. The document has been deleted.

## Section 5 Finding an Existing Requisition

### Navigation: Purchasing > Requisitions > Add/Updated Requisitions

1. On the Requisitions search page, click the **Find an Existing Value** tab.
2. Enter **SACST** in the Business Unit field.
3. Enter the desired **Requisition ID** number. If you don't know the entire requisition ID you can enter a partial ID number and include a wildcard character (%). For example, requisition numbers will begin with a three (3) followed by five zeros. See sample below.
4. Click the **Search** button.
5. The search results table will display the requisition(s). Open a requisition by clicking on the ID number. The Maintain Requisition page for the selected requisition will display.

**Requisitions**

Use the following search to look for an existing Requisition.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Business Unit: = SACST

Requisition ID: begins with 30000

Requisition Name: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

**Search** Clear Basic Search Save Search Criteria

**Search Results**

Only the first 300 results can be displayed.

View All

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
SACST	3000015162	3000015162	Approved	ONL	60000001106	IRT	N
SACST	3000015161	(blank)	Approved	ONL	60000001128	Presidents_Office	N
SACST	3000015160	(blank)	Open	ONL	60000001106	IRT	N
SACST	3000015159	(blank)	Open	ONL	60000001067	Development	N

## Section 6 Requisition Approval

CFS allows for online approval of requisitions by authorized end users. Depending on the end user’s security, the person entering the requisition may also approve it, or the approval may need to be completed by a manager or supervisor.

**NOTE:** Before a requisition can be Budget Checked or sourced to a PO, it must be approved.

The approval process is completed after the requisition has been saved and the requisition ID has been assigned.

### 6.1 Search for a requisition that Requires Approval

**Navigation:** Purchasing > Requisitions > Add/Update Requisitions

1. Select the **Find an Existing Value** tab.
2. Enter **SACST** in the Business Unit field.
3. If you know the requisition number, enter it into the **Requisition ID** field.
4. In the **Requisition Status** field, select “**Open**” from the drop down menu.
5. Click the **Search** button.

**Requisitions**

Use the following search to look for an existing Requisition.

▼ Search Criteria

Business Unit: = ▼ SACST

Requisition ID: begins with ▼ 30000

Requisition Name: begins with ▼

Requisition Status: = ▼ Open  ▼

Origin: begins with ▼

Requester: begins with ▼

Requester Name: begins with ▼

Hold From Further Processing

Case Sensitive


**Search Results**

View All First 1-73 of 73 Last

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
SACST	3000013822	(blank)	Approved	ONL	60000001106	IRT	N
SACST	3000013827	(blank)	Approved	ONL	60000001106	IRT	N
SACST	3000013820	(blank)	Approved	ONL	60000001106	IRT	N

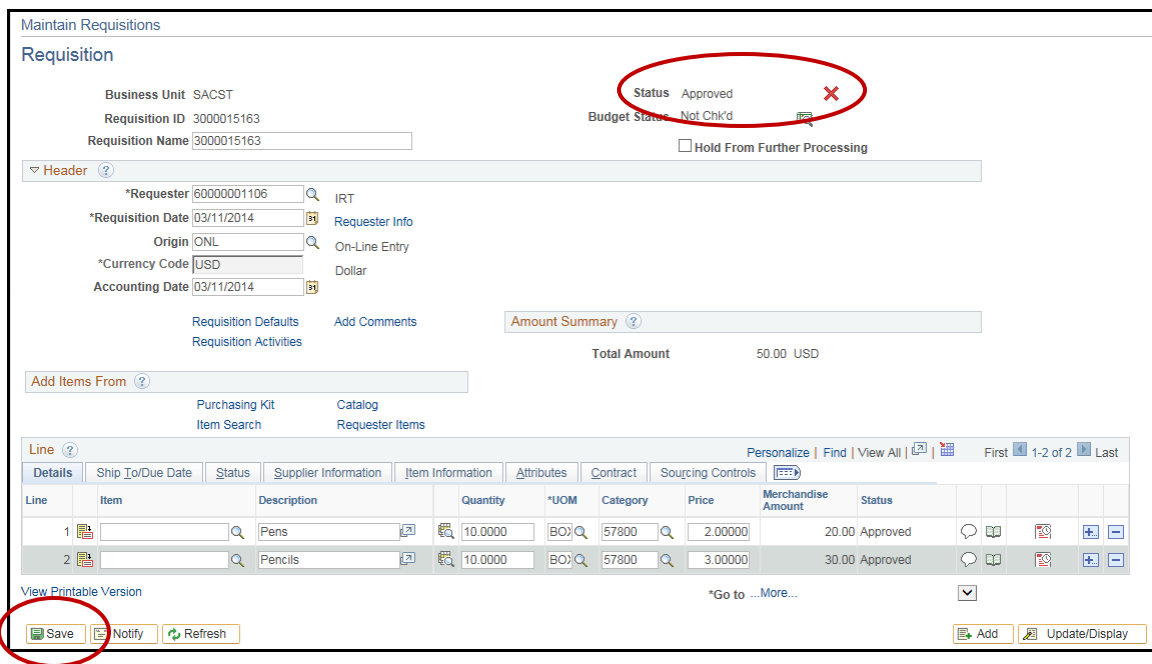
## 6.2 Approve a Requisition

Select the desired requisition from the **Search Results** list by clicking on the **Requisition ID** link.

1. On the **Maintain Requisitions** page, click on the **Approval** icon in the upper right corner. 
2. Click the **Save** button.



Once the requisition is approved, the Status will change from **Open** to **Approved**.

During the nightly processes, the budget check will take place and the requisition will be ready to be sourced to a Purchase Order.



Maintain Requisitions  
Requisition

Business Unit SACST  
Requisition ID 3000015163  
Requisition Name 3000015163

Status Approved   
Budget Status Not Chk'd   
 Hold From Further Processing






Header  
\*Requester 80000001106 IRT  
\*Requisition Date 03/11/2014 Requisition Info  
Origin ONL On-Line Entry  
\*Currency Code USD Dollar  
Accounting Date 03/11/2014

Requisition Defaults Add Comments  
Requisition Activities

Amount Summary  
Total Amount 50.00 USD

Add Items From  
Purchasing Kit Catalog  
Item Search Requirer Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Pens	10.0000	BO	57800	2.00000	20.00	Approved
2		Pencils	10.0000	BO	57800	3.00000	30.00	Approved

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



## Section 7 Review Requisition Information and Reports

### 7.1 Inquiring on the Status of a Requisition

CFS allows a user to check the status of a requisition online as it moves through the process.

#### Navigation: Purchasing > Requisitions > Review Requisition Information > Document Status

1. Click on the **Find an Existing Value** tab.
2. Enter the **Requisition ID**
3. Click the **Search** button.

The **Document Status** page will display a list of all documents associated with the requisition.

To view a document, click on the **Doc ID** link.

Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	SACST	Purchase Order	4000040579	Dispatched	01/15/2014	0000000188	8520 YOUNG

## 7.2 Reviewing Requisition Information

Requisition Inquiry gives the option to search for a requisition by various criteria.

**Navigation: Purchasing > Requisitions > Review Requisitions Information > Requisitions**

The Requisition Inquiry page will display. There are several categories that can be used to search for a requisition. Those categories are:

- Requisition ID
- Requisition Status
- Requester
- Requisition Date
- Supplier ID
- Supplier Name
- Department ID

The screenshot shows the 'Requisition Inquiry' search form. Red arrows point from the list on the left to the following fields: Business Unit (SACST), Requisition ID, Requisition Name, Req Status, Requester, Requester Name, Requisition Date, Supplier ID, and the OK button. The Supplier ID field is circled in red, and there are links for 'Supplier Lookup' and 'Supplier Details' next to it.

For example: To view requisitions for a specific vendor, click the search icon next to the **Supplier ID** field and select the desired vendor from the search results list. Click **OK**.

The screenshot shows a table titled 'Requisitions' with the following data:

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
SACST	<a href="#">3000015163</a>	3000015163	Approved	IRT	03/11/2014	50.00	USD
SACST	<a href="#">3000015162</a>	3000015162	Approved	IRT	03/10/2014	240,467.47	USD
SACST	<a href="#">3000011595</a>		Complete	Residence_Halls	04/04/2013	642.00	USD

A list of all requisitions assigned to that vendor will display on the Requisition Inquiry screen. Click on the desired **Requisition** number link to review the Requisition details.

If you know a specific **Requisition ID** that you wish to review, enter it into the Requisition ID field on the search screen and click the **OK** button.

**Requisition Inquiry**

Business Unit SACST

**Requisition ID** 3000014806

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID SACST Supplier Lookup

Supplier ID Supplier Details

Item SetID SACST

Item Description

Department

To Req

Origin

Card Number

To

Supplier Name

Item ID

Direct Ship

OK Cancel

The Requisition Inquiry screen will display the details of that requisition.

**Requisitions**

Req Inquiry Personalize Find View All First 1 of 1 Last

**Details** Status

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
SACST	3000014806		Approved	IRT	12/19/2013	4,951.57 USD

Search

Click on the **Status** tab.


**Requisitions**

Req Inquiry Personalize Find View All First 1 of 1 Last

**Status** Details

Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card
SACST	3000014806				Y					

Document Status

The status page will provide links to various information regarding the requisition. For example, if you click the **Document Status** icon  the Document Status screen will display in a new browser window.



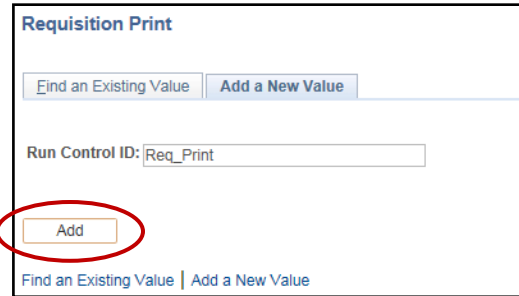
## Section 8 Printing a Copy of the Requisition

### 8.1 Printing using a Run Control

To print a copy of a requisition, you must initially establish a Run Control ID. Once the Run Control ID has been set up, it can be used each time you need to print a requisition.

**Navigation: Purchasing > Requisition > Reports > Print Requisition**

1. From the **Requisition Print** window, click on the **Add a New Value** tab.
2. In the **Run Control ID** field enter req print and click the **ADD** button.
3. A Run Control ID has now been established. In the future, click on the Find an Existing Value tab and enter req\_print in the Run Control ID field.



The screenshot shows the 'Requisition Print' window. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there is a text input field labeled 'Run Control ID:' containing the text 'Req\_Print'. Below the input field is a button labeled 'Add', which is circled in red. At the bottom of the window, there are two more tabs: 'Find an Existing Value' and 'Add a New Value'.

The **Requisition Print** screen will display. To print a requisition for your department's files, enter the following information.

4. In the Business Unit field, enter **SACST**.
5. Enter the **Requisition ID**
6. In the **Statuses to Include** section, make sure ALL checkboxes are selected by clicking the **Select All** button.
7. Make sure the drop down menu defaults to **"NOT On Hold"**
8. Click the **Run** button.

### Print Requisition

Run Control ID Req\_Print      Report Manager      Process Monitor **Run**

Language English  Specified Language  Recipient's Language

#### Report Request Parameters

Business Unit SACST

Requisition ID 3000014806

From Date

Through Date

Requester

#### Statuses to Include

- Approved
- Canceled
- Completed
- Open
- Pending

On Hold AND Not On Hold

**Select All**

Save    Return to Search    Notify    Add    Update/Display

The **Process Scheduler Request** page will display.

9. Make sure the checkbox for **Requisition Print SQR** is selected and the Type and Format are set to **Web and PDF**.
10. Click the **OK** button.

**Process Scheduler Request**

User ID: 60102004862      Run Control ID: Req\_Print

Server Name:       Run Date: 03/11/2014

Recurrence:       Run Time: 11:28:08AM     

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	Distribution

The Requisition Print screen will re-display, this time showing a Process Instance number. Click the **Process Monitor** link.

**Print Requisition**

Run Control ID Req\_Print      Report Manager      **Process Monitor**      Run

Language English       Specified Language       Recipient's Language      **Process Instance: 5275056**

**Report Request Parameters**

Business Unit SACST

Requisition ID 3000014806

From Date

Through Date

Requester

**Statuses to Include**

Approved     

Canceled

Completed

Open

Pending

On Hold AND Not On Hold

On the View Process Request page, click the refresh button until the run status for your instance displays **Success** and the Distribution Status displays **Posted**.

When it is finished processing, click the Details link.

Process List | Server List

View Process Request For

User ID: 60102004862 | Type: [ ] | Last: [ ] | 1 Days | Refresh

Server: [ ] | Name: [ ] | Instance: [ ] to [ ]

Run Status: [ ] | Distribution Status: [ ] |  Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5275056		SQR Report	PORQ010	60102004862	03/11/2014 11:28:08AM PDT	Success	Posted	<a href="#">Details</a>

On the **Process Detail** screen, click the **View Log/Trace** link at the bottom of the screen.

**Process Detail**

Process

Instance: 5275056 | Type: SQR Report

Name: PORQ010 | Description: Requisition Print SQR

Run Status: Success | Distribution Status: Posted

Run | Update Process

Run Control ID: Req\_Print |  Hold Request

Location: Server |  Queue Request

Server: PSUNX |  Cancel Request

Recurrence: |  Delete Request

|  Restart Request

Date/Time | Actions

Request Created On: 03/11/2014 11:29:43AM PDT | Parameters | Transfer

Run Anytime After: 03/11/2014 11:28:08AM PDT | Message Log

Began Process At: 03/11/2014 11:29:53AM PDT | Batch Timings

Ended Process At: 03/11/2014 11:30:06AM PDT | [View Log/Trace](#)

OK | Cancel



Click on the **PDF** file link. A copy of the requisition will open in a new browser window.

**View Log/Trace**

**Report**

Report ID: 3532      Process Instance: 5275056      Message Log  
 Name: PORQ010      Process Type: SQR Report  
 Run Status: Success

Requisition Print SQR

**Distribution Details**

Distribution Node: FCFSPRE      Expiration Date: 04/01/2014

**File List**

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_5275056.log	1,626	03/11/2014 11:30:06.446101AM PDT
<b>porq010_5275056.PDF</b>	4,888	03/11/2014 11:30:06.446101AM PDT
porq010_5275056.out	70	03/11/2014 11:30:06.446101AM PDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	60102004862

[Return](#)

To print the report, click on **print** icon in your browsers toolbar or menu.

**Requisition**  
Cal State Univ Sacramento

Ship To: Central Receiving  
6000 J STREET  
SACRAMENTO CA 95819-6117

Business Unit: SACST		APPROVED
Req ID	Date	Page
3000014806	12/19/2013	1
Requester	Telephone	Entered By
IRT		Robinson,Rolly

Line-Schd-Dist	Account	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution						Prgm	Class	Project		Dist Amt
Buyer: Wessendorf,Chris H										

## 8.2 Printing using View Printable Version

Printing a requisition using the **View Printable Version** link:

1. Click on the **View Printable Version** link at the bottom of the Maintain Requisitions screen.

The screenshot shows the 'Maintain Requisitions' interface for Requisition ID 3000015164. The status is 'Open' and the budget status is 'Not Chk'd'. The total amount is 50.00 USD. A table lists two items: Pens (10.0000 units at 2.00000 price) and Pencils (10.0000 units at 3.00000 price). The 'View Printable Version' link is circled in red at the bottom left of the table area.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Pens	10.0000	BO	57800	2.00000	20.00	Open
		Pencils	10.0000	BO	57800	3.00000	30.00	Open

2. When you receive the “you do not have permission” message click **OK**.

The screenshot shows the same 'Maintain Requisitions' interface as above, but with a 'Message' dialog box overlaid in the center. The dialog box contains the text: 'You do not have the permission required to run window option. (65,254). You do not have the permission required to run window option. See your system administrator.' An 'OK' button is visible at the bottom of the dialog box, which is circled in red.

Navigate to the Process Monitor to retrieve your document.

3. **People Tools > Process Scheduler > Process Monitor.**
4. Click the **Refresh** button until the Run Status is Success and Distribution Status is posted.
5. Click **Details** link.

The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below that is a search area with fields for 'User ID' (60102004862), 'Type' (Last), 'Days' (1), and a 'Refresh' button. There are also fields for 'Server', 'Name', 'Instance', and 'to'. Below the search area is a table with columns: 'Select', 'Instance', 'Seq.', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. The table contains one row with the following data: Instance 5275132, Process Type SQR Report, Process Name PORQ010, User 60102004862, Run Date/Time 03/11/2014 11:41:42AM PDT, Run Status Success, Distribution Status Posted, and Details. A red box highlights the 'Run Status', 'Distribution Status', and 'Details' columns for this row. Below the table are 'Save' and 'Notify' buttons.

6. Click the **View Log/Trace** link.

The screenshot shows the 'Process Detail' view. It has a header 'Process Detail' and a sub-header 'Process'. Below that are several sections: 'Instance' (5275132), 'Type' (SQR Report), 'Name' (PORQ010), 'Description' (Requisition Print SQR), 'Run Status' (Success), and 'Distribution Status' (Posted). There are two buttons: 'Run' and 'Update Process'. Below that are 'Run Control ID' (PS\_REQ\_SACST3000015164\_3470738), 'Location' (Server), 'Server' (PSUNX), and 'Recurrence'. There are five radio buttons: 'Hold Request', 'Queue Request', 'Cancel Request', 'Delete Request', and 'Restart Request'. Below that are 'Date/Time' and 'Actions' sections. The 'Date/Time' section has four rows: 'Request Created On' (03/11/2014 11:41:42AM PDT), 'Run Anytime After' (03/11/2014 11:41:42AM PDT), 'Began Process At' (03/11/2014 11:42:02AM PDT), and 'Ended Process At' (03/11/2014 11:42:16AM PDT). The 'Actions' section has four links: 'Parameters', 'Transfer', 'Message Log', and 'Batch Timings'. The 'View Log/Trace' link is circled in red. At the bottom are 'OK' and 'Cancel' buttons.

7. Select the **PDF** document and print the requisition.

**View Log/Trace**

**Report**

Report ID: 3589      Process Instance: 5275132      [Message Log](#)  
Name: PORQ010      Process Type: SQR Report  
Run Status: Success

Requisition Print SQR

**Distribution Details**

Distribution Node: FCSPRE      Expiration Date: 04/01/2014

**File List**

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_5275132.log	1,668	03/11/2014 11:42:16.395650AM PDT
porq010_5275132.PDF	4,818	03/11/2014 11:42:16.395650AM PDT
porq010_5275132.out	70	03/11/2014 11:42:16.395650AM PDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	60102004862

[Return](#)

## Section 9 Review Purchase Order Information and Reports

CFS allows the user to check the status of a Purchase order online. The Purchase Order status can be reviewed as it moves through the process.

### 9.1 Inquiring on the Status of a Purchase Order

**Navigation: Purchasing > Purchase Orders > Review PO Information > Purchase Orders**

1. Enter the **Purchase Order number** in the PO ID field.
2. Click the **Search** button.
3. The purchase order screen will display.

**Purchase Order Inquiry**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

Business Unit:	=	▼	SACST	🔍
PO ID:	begins with	▼	4000040579	🔍
Contract SetID:	begins with	▼		🔍
Contract ID:	begins with	▼		🔍
Release Number:	=	▼		
Purchase Order Date:	=	▼		📅
PO Status:	=	▼		▼
Short Supplier Name:	begins with	▼		🔍
Supplier ID:	begins with	▼		🔍
Supplier Name:	begins with	▼		🔍
Buyer:	begins with	▼		🔍
Buyer Name:	begins with	▼		🔍

Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

On the Purchase Order Inquiry page you can find information such as:

- PO Status
- PO Reference
- The name of the buyer
- Documents Status
- Budget Status

- Total Amount
- Verify Chartstring

Purchase Order Inquiry

**Purchase Order**

Business Unit SACST  
PO ID 4000040579

PO Status Dispatched  
Budget Status Valid

Header

PO Date 01/15/2014  
Supplier Name BURKETT'S-001  
Supplier ID 000000182  
Buyer Wessendorf,Chris H  
PO Reference 3000014806

Supplier Details  
Activity Summary  
Header Details  
All RTV  
Matching  
Header Comments...  
Document Status  
Actions

Backorder Status Not Backordered  
Receipt Status Not Recvd  
Hold From Further Processing

Amount Summary

Merchandise	4,951.57
Freight/Tax/Misc	0.00
<b>Total</b>	<b>4,951.57 USD</b>
Encumbrance Balance	4,951.57 USD

Lines

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		Redesign of corner cubicle loc	42000	1.0000	DLR	4,951.57 USD	Approved

Return to Search | Notify | Related Links

## 9.2 Inquiring Activity Summary

Navigation: Purchasing > Purchase Orders > Review PO Information > Activity summary

1. Enter the purchase order number in the **PO Number** field.
2. Click the **Search** button.
3. The **Activity Summary** page will display.

**PO Activity Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: = SACST

PO Number: begins with 4000040579

Purchase Order Date: =

Purchase Order Reference: begins with

Supplier ID: begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

**Activity Summary**

Business Unit	SACST	PO Status	Dispatched
Purchase Order	4000040579	Supplier	BURKETT'S
Merchandise Amount	4,951.57 USD	Supplier Location	8520 YOUNG
Merchandise Receipt	0.00 USD		
Merchandise Returned	0.00 USD		
Merchandise Invoice	0.00 USD		
Merchandise Matched	0.00 USD		

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

Details Receipt Invoice Matched RTV

Line	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID	GTIN
1		Redesign of corner cubicle loc	DLR			

The Activity Summary page will display Purchase Order activity. Each tab will provide links to information and documents.

Click on the **Line Details** icon on any of the available tabs to view details such as **receipt** and **invoice** information.

### 9.3 Viewing the Status of a Purchase Order

**Navigation: Purchasing > Purchase Orders > Review PO Information > Document Status**

1. Enter the **Purchase Order Number**
2. Click the **Search** button

**Purchase Order Document Status**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit:

PO Number:

Purchase Order Date:

Origin:

Purchase Order Reference:

Case Sensitive

Search Clear Basic Search Save Search Criteria

The **Document Status** screen will display information regarding the PO such as its status or buyer. It will also give you the status of documents such as the Receipts, Voucher and Payment.

### Document Status

Business Unit SACST	PO ID 4000040579
Document Date 01/15/2014	Status Dispatched
Currency USD	Document Type Purchase Order
Buyer Wessendorf,Chris H	Merchandise Amt 4,951.57
	Budget Status Valid

**Associated Document** Personalize | Find | View All | | First 1 of 1 Last

Documents	Related Info						
Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Location	
▼ Actions	SACST	Requisition	3000014806	Approved	12/19/2013		

## 9.4 Printing a Copy of the Purchase Order

Initially a Run Control ID will need to be established. Once the Run Control ID has been set up, it can be used each time you need to print a Purchase Order.

**Navigation: Purchasing > Purchase Orders > Review PO Information > Print POs**

1. Click the **Add a New Value** tab
2. Enter a **Run Control ID** such as PO\_Print.
3. Click the **Add** button

### Purchase Orders Print

Find an Existing Value
Add a New Value

Run Control ID:

Add

Find an Existing Value
Add a New Value



The **Purchase Orders Print** screen will display.

Print POs

Run Control ID PO\_Print      Report Manager      Process Monitor      Run

Language English      Specified Language      Recipient's Language

**Report Request Parameters**

Business Unit SACST      To SACST

PO ID 4000040579      Select Purchase Order

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

**Statuses to Include**

Approved       Dispatched       Canceled

Open       Pending       Completed

**Miscellaneous Options**

\*Hold Status On Hold AND Not On Hold

\*Chartfields Recycled AND Valid Chartfields

Change Orders Changed and UnChanged Orders

Print Changes Only

Print PO Item Description

Print Duplicate

Number Of Copies 1

Sort By Sort by Line Number

Save      Notify      Add      Update/Display

4. Enter the **Purchase Order Number** in the PO ID field. Leave all other fields as they are.
5. Click the **Run** button.

Process Scheduler Request

User ID: 60102004862      Run Control ID: PO\_Print

Server Name:      Run Date: 03/11/2014

Recurrence:      Run Time: 4:09:27PM      Reset to Current Date/Time

Time Zone:     

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Dispatch/Print	POPO005	SQR Report	Web	PDF	Distribution

OK      Cancel

6. The **Format** field should display **PDF**.
7. Click the **OK** button.
8. When the Purchase Orders Print screen re-displays, click on the Process Monitor link.

Report Manager      Process Monitor      Run

Recipient's Language      Process Instance:5276242

The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below that is a search area with fields for 'User ID' (60102004862), 'Type', 'Last', '1 Days', and a 'Refresh' button. There are also fields for 'Server', 'Name', 'Instance', and 'to'. Below the search area is a table with columns: 'Select Instance', 'Seq.', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. The first row of data shows Instance 5276242, Process Type SQR Report, Process Name POPO005, User 60102004862, Run Date/Time 03/11/2014 4:09:27PM PDT, Run Status Success, and Distribution Status Posted. A red circle highlights the 'Run Status' and 'Distribution Status' columns for this row.

9. On the Process Monitor screen, click the Refresh button until the Run Status displays **Success** and the Distribution Status displays **Posted**.

10. Click the **Details** link

The screenshot shows the 'Process Detail' screen. It has a header 'Process Detail' and a sub-header 'Process'. Below this, there are two columns of information: 'Instance 5276242', 'Name POPO005', 'Run Status Success', 'Type SQR Report', 'Description PO Dispatch/Print', and 'Distribution Status Posted'. There are two main sections: 'Run' and 'Date/Time'. The 'Run' section has a 'Run Control ID PO\_Print', 'Location Server', 'Server PSNT', and 'Recurrence'. The 'Date/Time' section has 'Request Created On 03/11/2014 4:10:03PM PDT', 'Run Anytime After 03/11/2014 4:09:27PM PDT', 'Began Process At 03/11/2014 4:10:14PM PDT', and 'Ended Process At 03/11/2014 4:10:28PM PDT'. There are also 'Actions' listed: 'Parameters', 'Transfer', 'Message Log', 'Batch Timings', and 'View Log/Trace'. A red arrow points to the 'View Log/Trace' link. At the bottom, there are 'OK' and 'Cancel' buttons.

11. On the Process Details screen, click the **View Log/Trace** link.

12. Click the **PDF** file link to open the Purchase Order file.

### View Log/Trace

Report

Report ID: 4426      Process Instance: 5276242      [Message Log](#)  
Name: POPO005      Process Type: SQR Report  
Run Status: Success  
PO Dispatch/Print

Distribution Details

Distribution Node: FCFSPRENT      Expiration Date: 04/01/2014

File List

Name	File Size (bytes)	Datetime Created
<a href="#">POPO005_5276242.PDF</a>	21,588	03/11/2014 4:10:28.238311PM PDT
POPO005_5276242.out	146	03/11/2014 4:10:28.238311PM PDT
SQR_POPO005_5276242.log	1,541	03/11/2014 4:10:28.238311PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	60102004862

The **Purchase Order** will open as a PDF file.

**NOTE:** *This is an unauthorized copy of the Purchase Order. The vendor will not accept it as an authorized Purchase Order.*

## Section 10 Personalizing the Screens

You will notice when you view the Requisition pages that a number of un-used fields will display on your screen. You can customize each page and hid any unwanted fields or tabs. Once saved, your customizations will remain each time you log on to the system.

### 10.1 Reordering Fields

On any page in the Requisition process, re-arrange the order of columns by clicking an individual column heading (e.g., UOM) and dragging & dropping it to a new location.



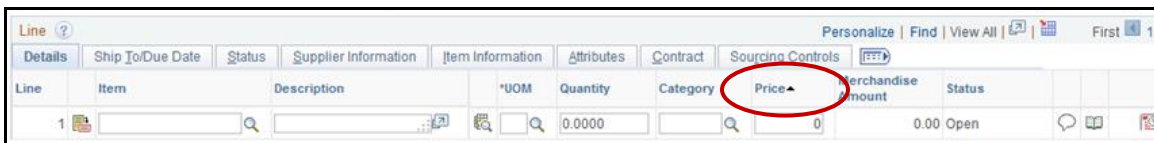
### 10.2 Resizing Fields

Adjust column widths by clicking the edge of a column heading and dragging that edge right or left until the desired column width is achieved.



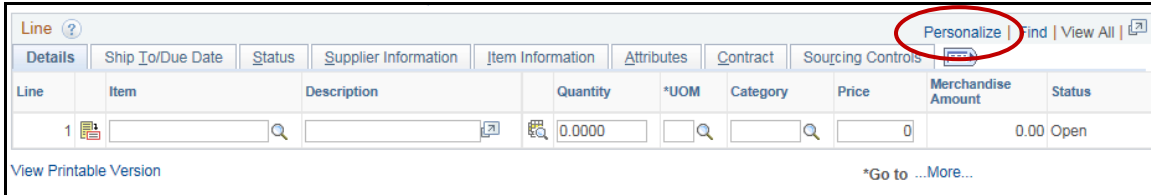
### 10.3 Temporarily Adjusting Sort Order

Perform a one-time sort of information by clicking on a column heading (e.g., Price) by which you wish to sort. An upward or downward facing arrow will appear next to the heading to indicate either ascending or descending order. Click the column heading again to switch between the two sort orders.

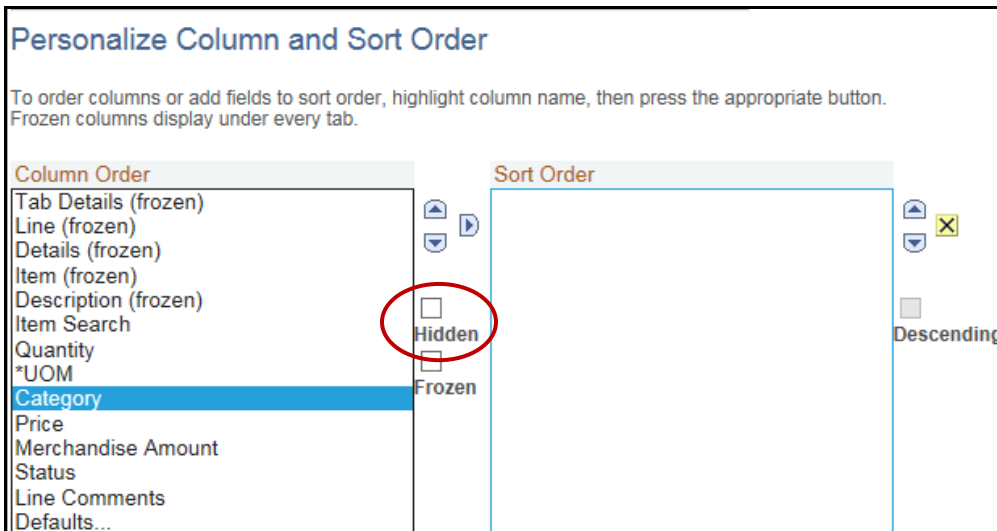


### 10.4 Hiding Fields

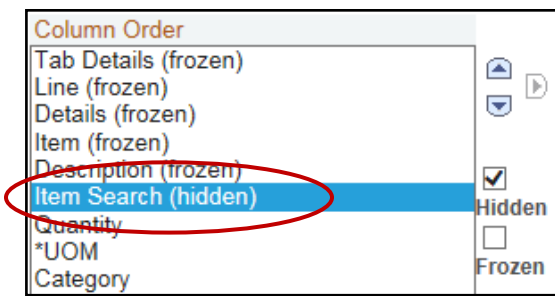
1. On any page in the Requisition process, click on the **Personalize** link at the end of a line.



The **Personalize Column and Sort Order** page will display. A list of all fields will display in the left hand column.



2. Select the fields you wish to hide by clicking on each field name in the left hand column. You can use Ctrl>Click or Shift>Click to make multiple selections.
3. Click on the **Hidden** checkbox.
4. The fields you wish to hide will now read (hidden) after the field name.
5. Click the **OK** button to save.



### 10.5 Hiding Tabs

You can hide unwanted tabs using the same method described above.

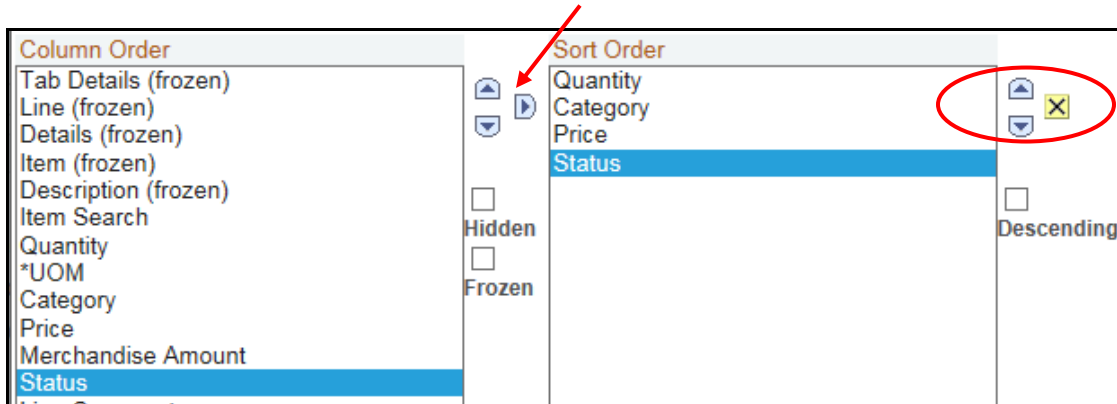
1. Look for the title of the tab you wish to hide and highlight it. You can highlight multiple tabs by using Ctrl>Click.

2. Select the **Hidden** checkbox.
3. Click the **OK** button and the selected tabs will be hidden.

## 10.6 Adjusting the Sort Order (Long-Term)

You can also adjust the order in which the desired fields will display on a page. To customize the display order:

1. Select the fields you wish to view from the left hand column. Use Ctrl>Click to select multiple items.
2. Once selected, click on the right arrow button. Your selections will appear in the right hand column.



3. Using the Up/Down arrow buttons, select a field and move it to the desired position: First, Second, etc.
4. When you have finished your customizations, click the **OK** button.
5. Each time you log in to these finance pages, your customizations will be saved for you.

**NOTE:** *Although these customizations will remain saved each time you log in, they are not permanent. If you find you have hidden a field that is needed, go back into the Personalization page and un-hide the desired field.*

## Section 11 CSU PO Life Cycle Report

### Overview

This report is designed to provide relevant detail information for a Purchase Order and any related documents into a single, convenient format. The report is available to **all authorized End Users** and will be a resource for use by both the Accounts Payable and Purchasing departments as they investigate issues and finalize purchase orders.

- Departments will primarily utilize this report as an inquiry tool and may optionally print the report for their records. This report can be used to research purchase order issues.
- The Accounts Payable and Purchasing Departments may also use this report to assist in liquidating Purchase Orders in addition to general inquiries.
- This report is designed to show the life cycle of a Purchase Order. Because of the need to show all Purchase Order information, no chartfields will be used as selection criteria. The selection criteria for the report will be Business Unit (SACST Required) and one of the following: Purchase Order Number, Requisition Number, Voucher Number. (See following screenshots of options/settings.)
- The label for the number (PO ID, Req ID, Voucher ID) is changed depending on the radio button that you select. The prompt table of Business Unit changes also. Purchase Order and Requisition use PO BU prompt table. Voucher uses AP BU prompt table. Prompt tables for the IDs are also changed. (See following screenshots of options/settings.)


This screenshot shows the 'Select PO using' form with the 'Purchase Order' radio button selected and circled in red. Below it, the 'Process Options' section has two input fields: '\*Business Unit:' and '\*PO ID:', both with search icons circled in red.


This screenshot shows the 'Select PO using' form with the 'Requisition' radio button selected and circled in red. Below it, the 'Process Options' section has two input fields: '\*Business Unit:' and '\*Req ID:', both with search icons circled in red.

Select PO using:

Purchase Order    Requisition    Voucher

Process Options

\*Business Unit:  

\*Voucher ID:  

**Navigation: Purchasing > Purchase Orders > Reports > CSU PO Life Cycle Report**

1. To add a Run Control select the **Add a New Value** tab.
2. Enter CSU\_PO\_LIFE\_CYCLE\_REPORT in the **Run Control ID** box.
3. Click the **ADD** button.

**CSU - PO Life Cycle Report**

Run Control ID:



**CSU PO Life Cycle Report**

Run Control ID CSU\_PO\_LIFE\_CYCLE\_REPORT Report Manager Process Monitor **Run**

Select PO using:

Purchase Order  Requisition  Voucher

Process Options

\*Business Unit:

\*PO ID:

Save Add Update/Display

4. Enter the **Business Unit** SACST.
5. Enter the **PO** number.
6. Click the **Run** button.

**Process Scheduler Request**

User ID: 60102004862 Run Control ID: CSU\_PO\_LIFE\_CYCLE\_REPORT

Server Name:  Run Date: 03/11/2014

Recurrence:  Run Time: 5:05:34PM **Reset to Current Date/Time**

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Life Cycle Report	CSUPO010	SQR Report	Web <input type="text"/>	PDF <input type="text"/>	Distribution

**OK** Cancel

7. Click the **OK** button.

CSU PO Life Cycle Report

Run Control ID CSU\_PO\_LIFE\_CYCLE\_REPORT Report Manager **Process Monitor** Run

Process Instance:5276467

Select PO using:

Purchase Order  Requisition  Voucher

Process Options

\*Business Unit: SACST

\*PO ID: 4000040579

Save Add Update/Display

8. Click **Process Monitor** link.

Process List Server List

View Process Request For

User ID 60102004862 Type Last 1 Days Refresh

Server Name Instance to

Run Status Distribution Status Save On Refresh

Process List Personalize Find View All First 1-4 of 4 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5276467		SQR Report	CSUPO010	60102004862	03/11/2014 5:05:34PM PDT	Success	Posted	Details

9. Click on **Refresh** until your Run/Distribution Status reads **Success/Posted**.

10. Click on the **Details** link.

**Process Detail**

**Process**

Instance 5276467      Type SQR Report  
 Name CSUPO010      Description PO Life Cycle Report  
 Run Status Success      Distribution Status Posted

**Run**      **Update Process**

Run Control ID CSU\_PO\_LIFE\_CYCLE\_REPORT       Hold Request  
 Location Server       Queue Request  
 Server PSUNX       Cancel Request  
 Recurrence       Delete Request  
     Restart Request

**Date/Time**      **Actions**

Request Created On 03/11/2014 5:06:19PM PDT      Parameters      Transfer  
 Run Anytime After 03/11/2014 5:05:34PM PDT      Message Log  
 Began Process At 03/11/2014 5:06:34PM PDT      Batch Timings  
 Ended Process At 03/11/2014 5:06:47PM PDT      **View Log/Trace**

11. Click the **View Log/Trace** link.

**View Log/Trace**

**Report**

Report ID: 4574      Process Instance: 5276467      Message Log  
 Name: CSUPO010      Process Type: SQR Report  
 Run Status: Success

PO Life Cycle Report

**Distribution Details**

Distribution Node: FCFSPRE      Expiration Date: 04/01/2014

**File List**

Name	File Size (bytes)	Datetime Created
SQR_CSUPO010_5276467.log	1,671	03/11/2014 5:06:47.865472PM PDT
<b>csupo010_5276467.PDF</b>	5,366	03/11/2014 5:06:47.865472PM PDT
csupo010_5276467.out	3,655	03/11/2014 5:06:47.865472PM PDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	60102004862

12. Click on the **PDF** file in the File List (i.e., the file that ends in the “.PDF” file extension).

Report ID: CSUP0010	Cal State Univ Sacramento	Page No : 1
Operator : 60102015301	Purchase Order Life Cycle Report	Run Date: 04/18/2011
Database : FCFSPRDP		Run Time: 09:10:43
Bus Unit: SACET	PO Ref: 3000003178	Change Order #: 000
PO Id: 4000030173	PO Type: Serv Order	Change Order Date:
PO Dt: 04/15/2011	PO Buyer: 60102079742	
Vendor Id: 0000084685	PO Status: Dispatch	
Vendor Name: AYITTEY GEORGE B.N.		

Requisition Information:												
Req Id	Ln/Sr/De	Status	Description	Categ Cd	Requestor	Acct /Dept Id	/Fund /Prog /Project Id/Class	Price	UOM	QTY	PO Ln/Sr/De	Total Amount
3000003178	1/1/1	Processed	PROVIDE HONORARIUM/GUR	96200		660003/11600	/CL004/ / /7004K	800.00	RA	1.0	1/1/1	800.00
<b>Total REQ</b>												800.00

PO Detail Information 4000030173 - 04/15/2011														
Ln/Sr/De	Stat	Description	Categ	Due Date	Location	Acct /Dept Id	/Fund /Prog /Project Id/Class	Price	UOM	QTY	Total Tax	Total Prq	Total Msc	Total Amount
1/1/1	Open	PROVIDE HONORARIU	00270	04/15/2011	CTA	660003/11600	/CL004/ / /7004K	800.00	RA	1.0	0.00	0.00	0.00	800.00
<b>Total PO</b>										1.0	0.00	0.00	0.00	800.00

**You report should look like this**

End of Report

13. Repeat this process for the Requisition Life Cycle and Voucher Life Cycle Report.

## Section 12 How to identify the Buyer for your requisition:

Navigation: Purchasing>Requisitions>Review Requisition Information>Requisitions

1. Enter the Requisition number under **Requisition ID**.
2. Click the **OK** button.

**Requisition Inquiry**

Business Unit SACST

**Requisition ID**

To Req

Requisition Name

Req Status

Origin

Requester

Card Number

Requester Name

Requisition Date

To

Supplier SetID SACST [Supplier Lookup](#)

Supplier ID  [Supplier Details](#)

Supplier Name

Item SetID SACST

Item Description

Item ID

Department

Direct Ship

OK Cancel

3. Click on the **Requisition number** (in the Requisition column).

**Requisitions**

Req Inquiry Personalize | Find | View All | | First 1 of 1 | Last

Details Status

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
SACST	3000014806		Approved	IRT	12/19/2013	951.57	USD

Search

Notify

4. Click the **More** tab displayed below the Requisition Details heading.

**Requisition Details**

Business Unit SACST Req ID 3000014806  
 Requester IRT  
 Requisition Date 12/19/2013 Merchandise Amount 951.57 USD  
 Req Status Approved Pre-Encumbrance Balance 0.00 USD

Requisition Details Personalize Find View All First 1 of 1 Last

Details More Contract

Line	Status	Item ID	Description	Supplier ID	Supplier	Req Qty	UOM	Merchandise Amt	Amount Only
1	Approved		Redesign of corner cubicle loc	0000000188	BURKETT'S	1.0000	Dolalr	951.57 USD	

Return

The Buyer number will display.

**NOTE:** *If the Buyer column is blank the requisition is waiting to be assigned.*

**Requisition Details**

Business Unit SACST Req ID 3000014806  
 Requester IRT  
 Requisition Date 12/19/2013 Merchandise Amount 951.57 USD  
 Req Status Approved Pre-Encumbrance Balance 0.00 USD

Requisition Details

Details More Contract

Line	Status	Item ID	Description	Buyer	Supplier Item ID	GTIN	Supplier's Catalog	Category
1	Approved		Redesign of corner cubicle loc	60102052572				96200

Return

BUYER ID

The following table displays corresponding Buyer names and numbers.

**Search Results**

View 100 First 1-10 of 10 Last

Buyer	Name
60000002000	TRAVEL_BUYER
60101020474	Massey,Karen D
60101053312	Clack,Dale M
60101053313	Morris,Janet L
60101058655	Swartz,Suzanne D
60102015301	Davis,Leah J
60102052572	Wessendorf,Chris H
60102079742	Bianco,Michelle J
60213257006	Guion,John Robert
60217148426	Gernert-Johnson,Michelle

The link below is a list of "whom to contact" for Commodity or Services

<http://www.csus.edu/aba/procurement/staff.html>



## Summary

For more information on how to enter requisitions, please visit the CFS training website at [www.csus.edu/CFS/training](http://www.csus.edu/CFS/training) where you will find additional tutorials on the subject. For questions, regarding CFS or Oracle/PeopleSoft issues such as navigation or log in problems, please contact the Information Resources & Technology (IRT) Service Desk at 278-7337.

If you have questions specifically related to creating or modifying requisitions, please call the Procurement office at 278-7322.