# CFS

## Requisition Process User Guide

| Contact Us: | |
|---|---|
| web | www.csus.edu/irt/acs/reference/cfs/index.html |
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Last updated 8/20/2015

# 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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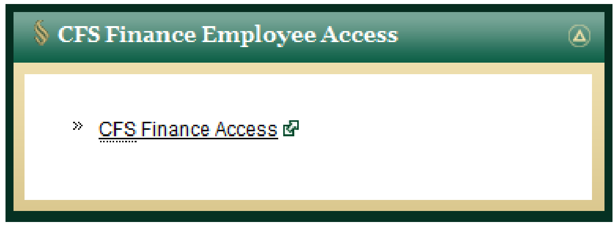
# Section 1 Create Requisitions using Requisition Defaults

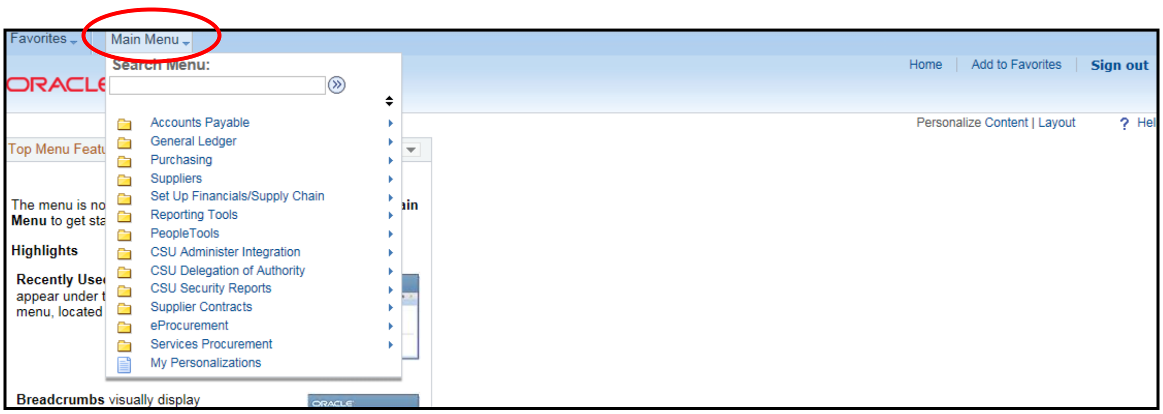
When creating a requisition with multiple lines using the same Chartstring information, it is best to enter Requisitions using the requisition defaults. Setting the defaults before entering each line will save time and reduce errors.

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.



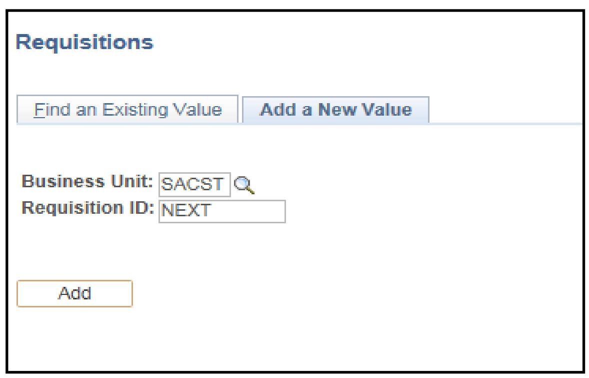

3. The Oracle/PeopleSoft menu page will display in a new browser window. Select the Main Menu option at the top of the screen.



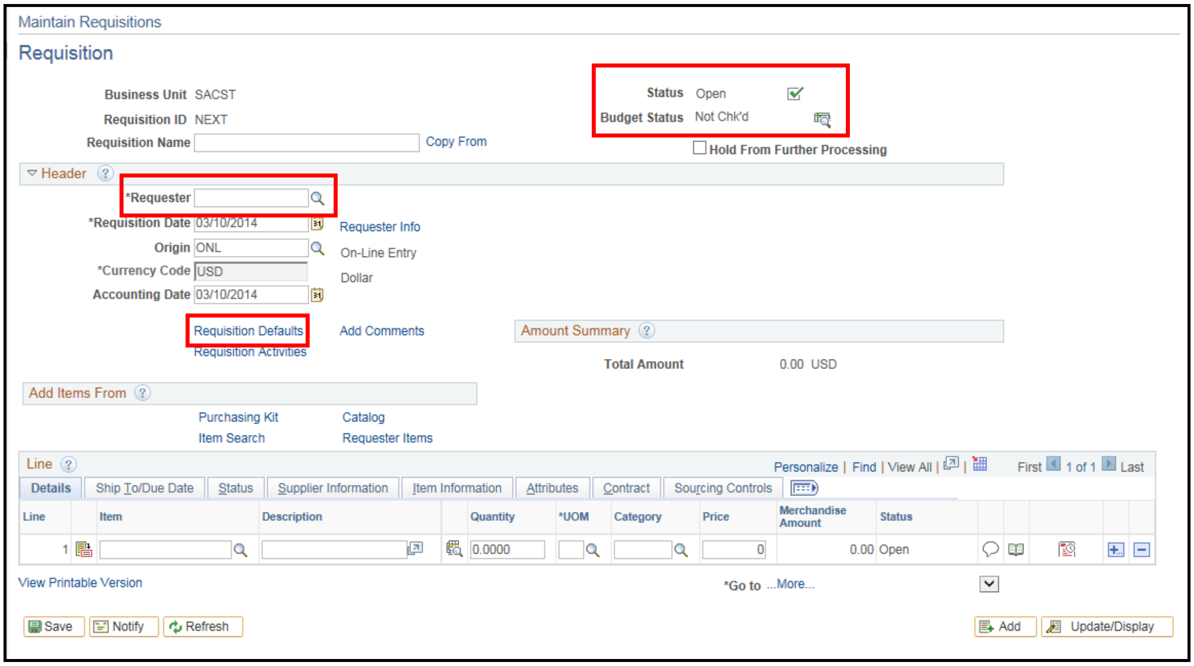

**Navigation: Purchasing > Requisitions > Add/Update Requisitions**

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.



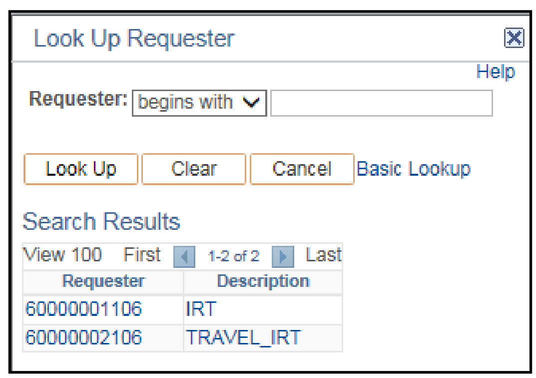

The Maintain Requisitions screen will display.




6. On the Maintain Requisitions screen, the **Status**: displays “**Open**” and **Budget Status**: is “**Not Chk’d**”.

7. 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

8. Click the **Requisition Defaults** link shown above.

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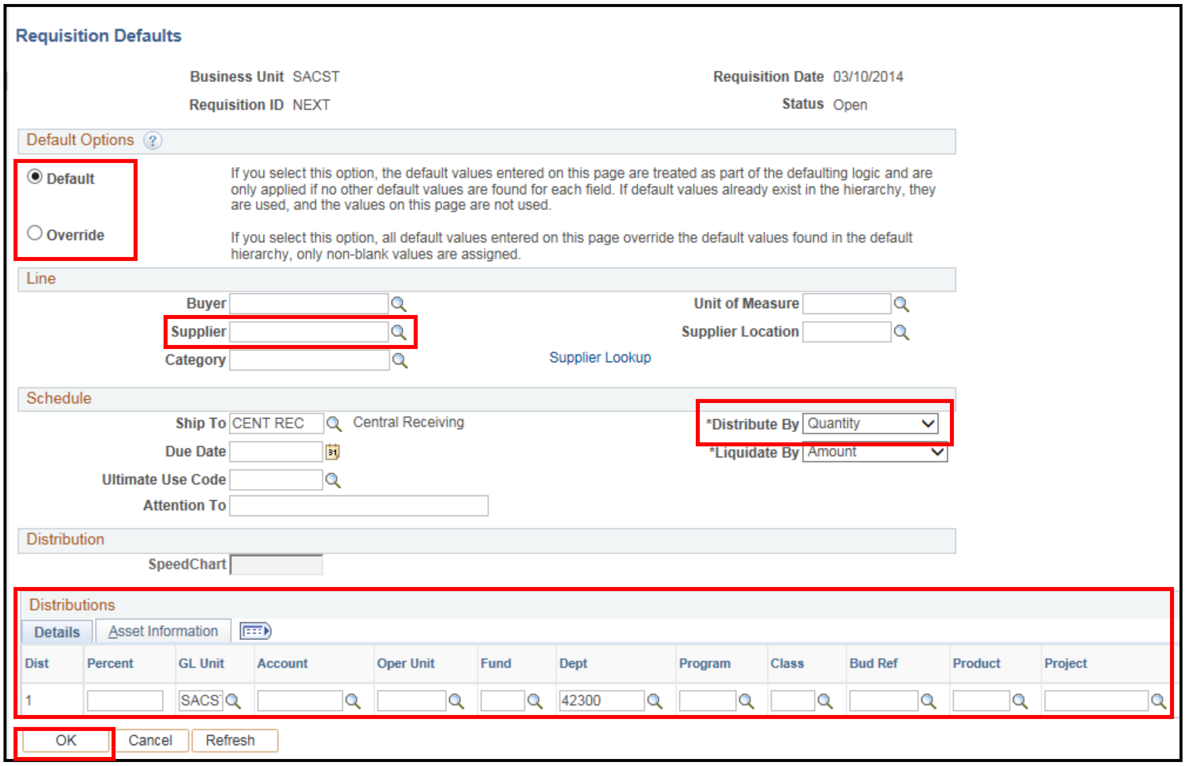
The **Requisition Defaults** screen, shown below, is used to select the supplier and to enter default Chartstring information.




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

   **<u>Note</u>: 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.*

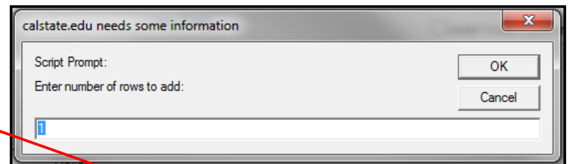
13. After entering all Chartstring information, click the **OK** button.

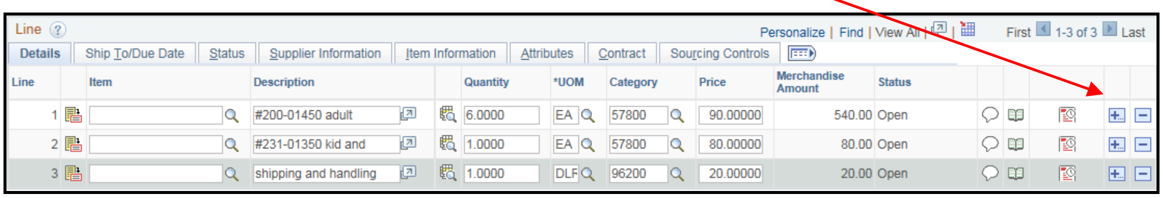
The **Maintain Requisition** screen will display again. The next step is to enter the details for each line item.

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.




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.

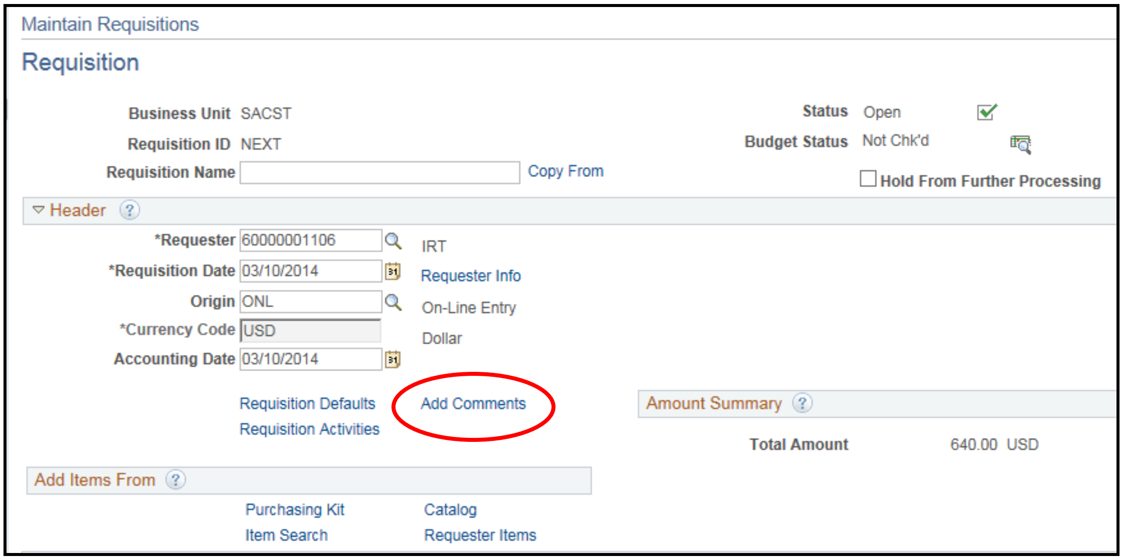
**Category:** Enter **57800** for miscellaneous products or **96200** for miscellaneous services.

**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.

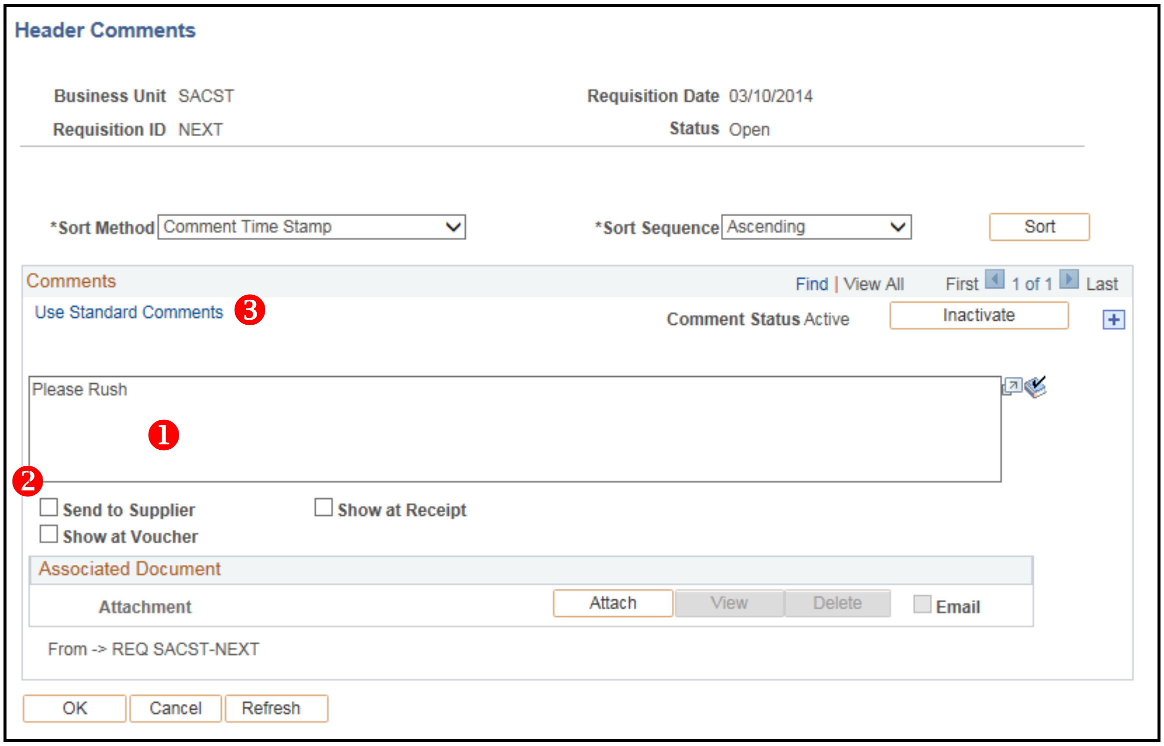



The **Header Comments** page will display.

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.

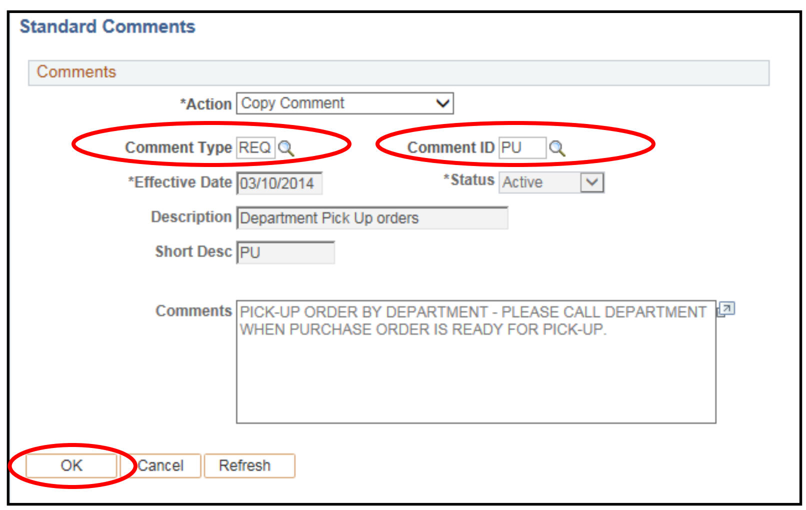



4. From the standard comments window, enter REQ in the **Comment Type** field.

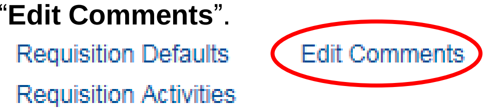
5. In the **Comment ID** field, click the search icon and select from the search results list.

6. The standard comment will populate in the Comments textbox.

7. Click the **OK** button to continue.

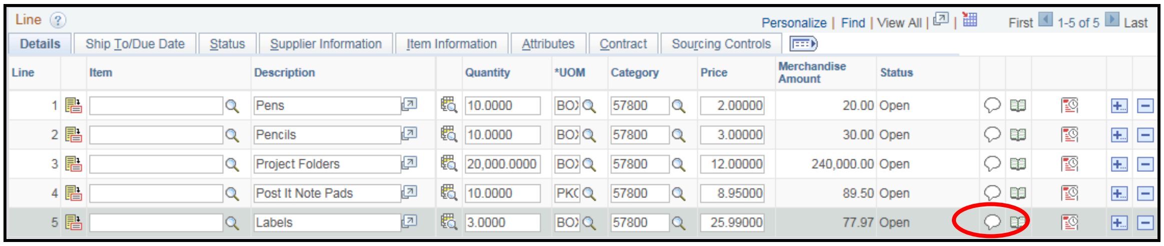



**NOTE**: Once comments are entered into the comments field, the comments link on the Requisition screen will change to "**Edit Comments**".



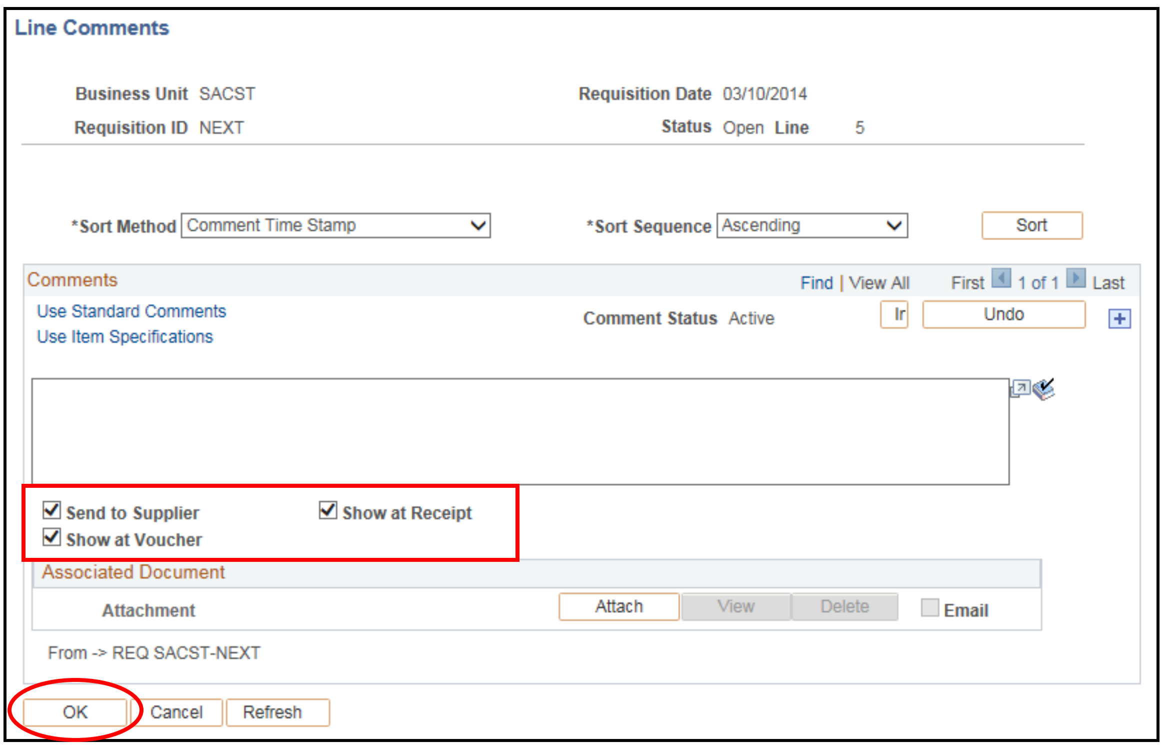
## 1.2 Add a Line Comment

To add a comment to an individual line item, click the comments icon in the desired line.



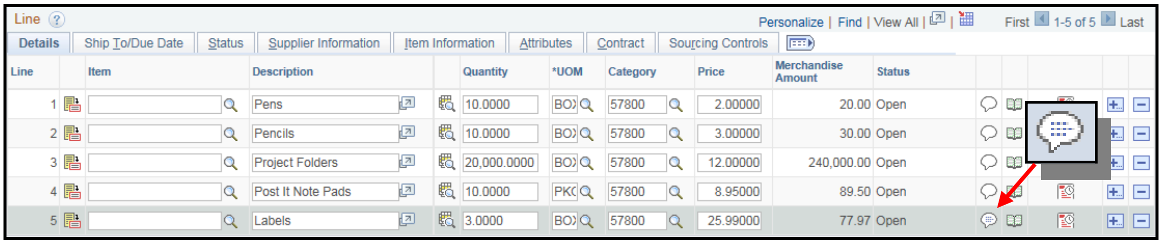

The **Line Comments** screen will display.

This screen functions like the Header Comments screen.



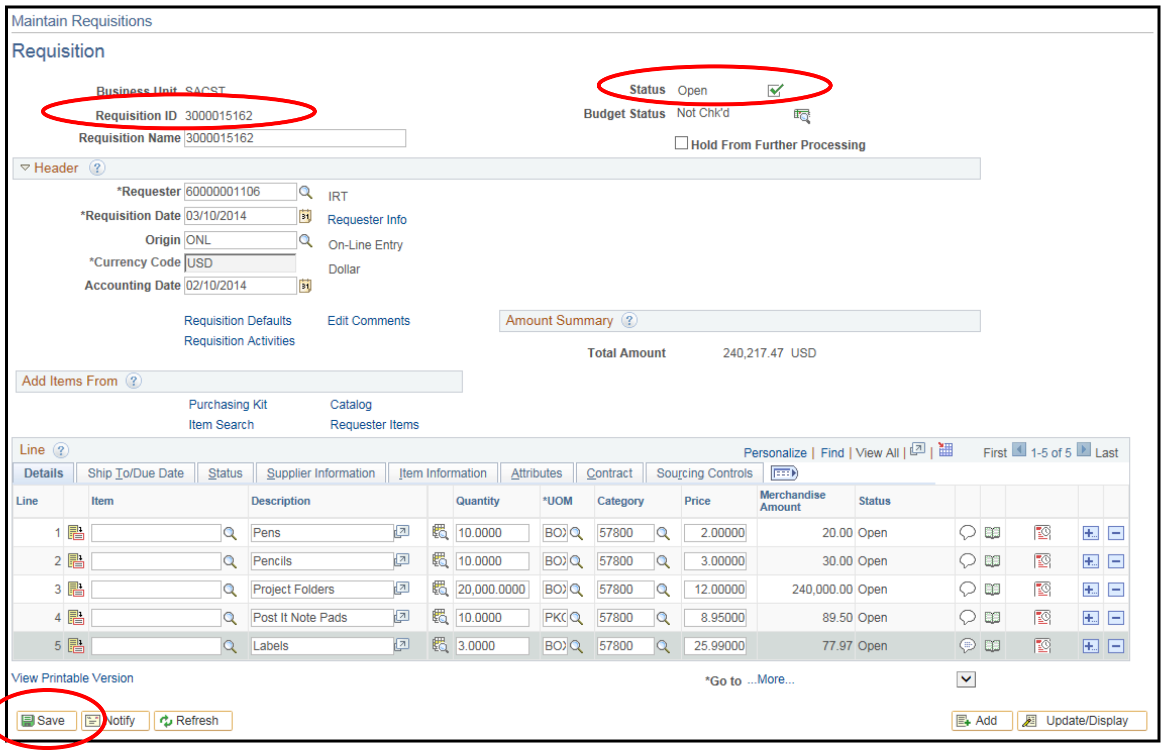

1. Enter comments in the text box.
2. Select **Send to Vendor, Shown at Receipt** and **Shown at Voucher** check boxes at the bottom of the screen.
3. Click the **OK** button to return to the requisition screen.

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




## 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. Save




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. Save

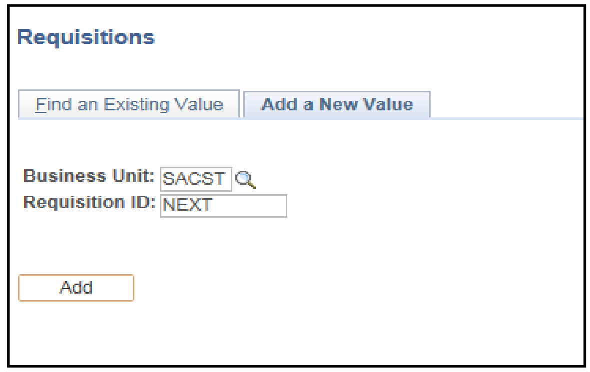
> **NOTE**: *All requisitions will be Budget Checked nightly.*

# Section 2 Uploading an Attachment to a Requisition

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

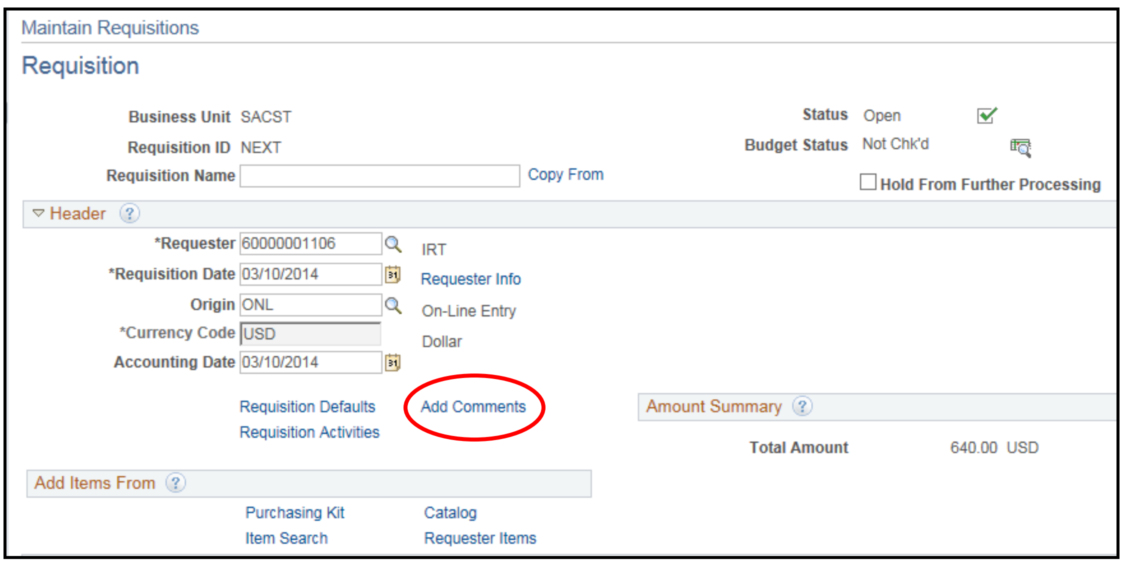
1. The **Add a New Value** screen will display. The business unit will default to SACST and the Requisition ID will default to NEXT. Use these settings.

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 **Maintain Requisitions** screen will display.

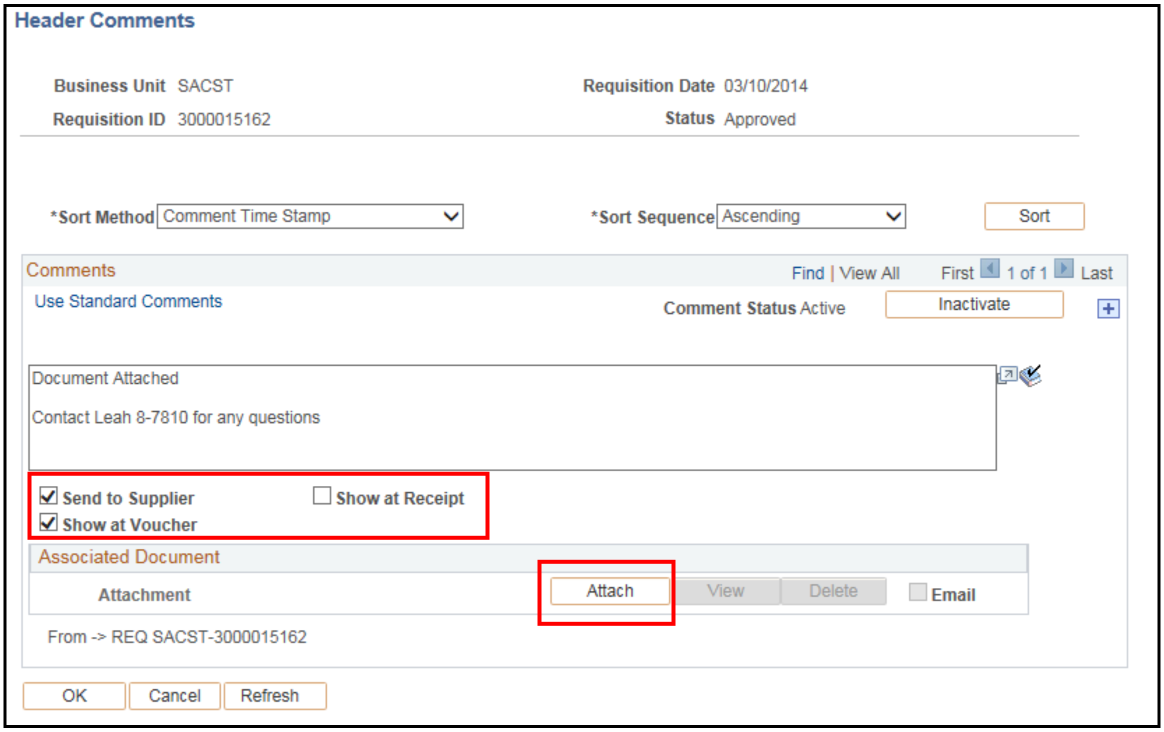
3. Click the **Add Comments** link to add an attachment.




4. Type "**Document Attached**" in the Comments box so the Buyer knows the requisition has an attachment.

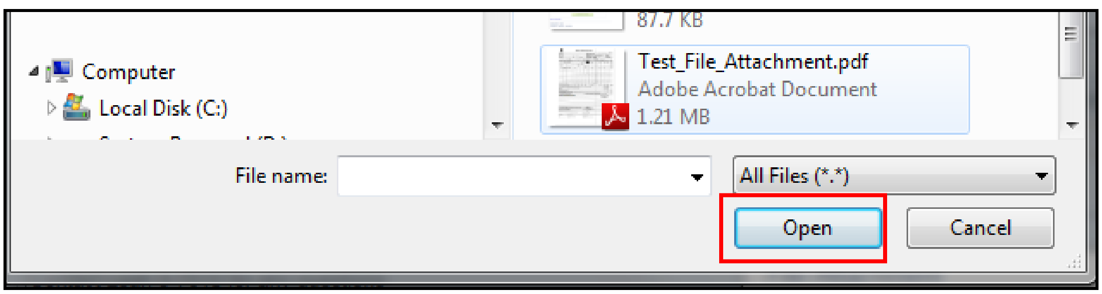
5. Click the three available checkboxes: **Send to Vendor**, **Shown at Receipt**, and **Shown at Voucher**.

6. Click the **Attach** button below the checkboxes.

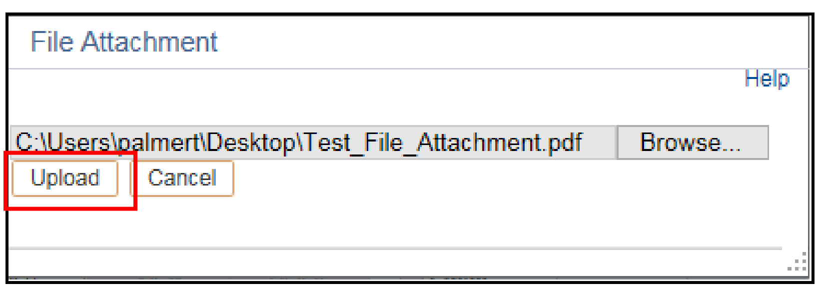



7. After clicking the Attach button, select the “Choose File” or “Browse” option.

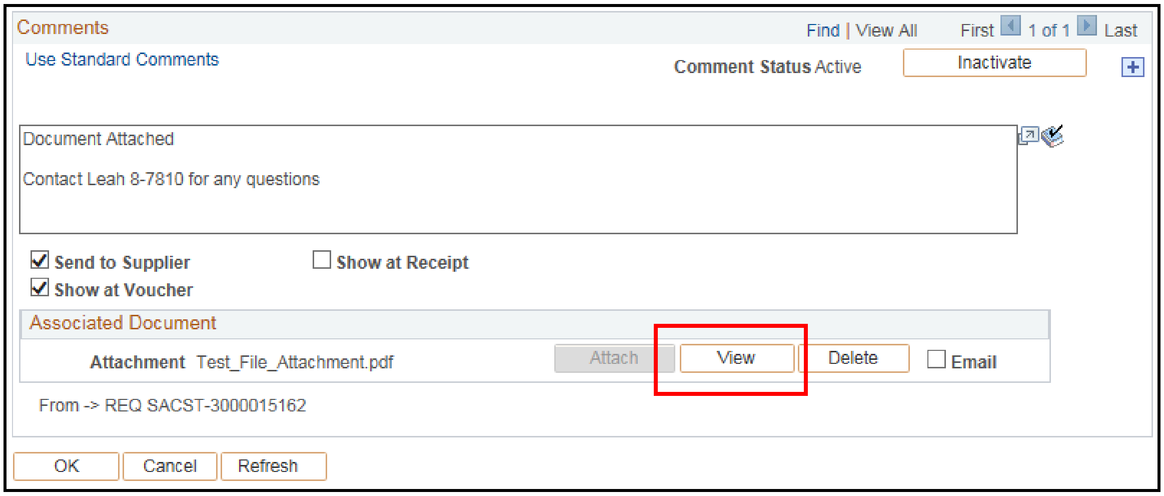
8. Find the location of the document you wish to attach and click the file name to select it.




9. Click the **Open** button.




10. Click the **Upload** button.




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

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.

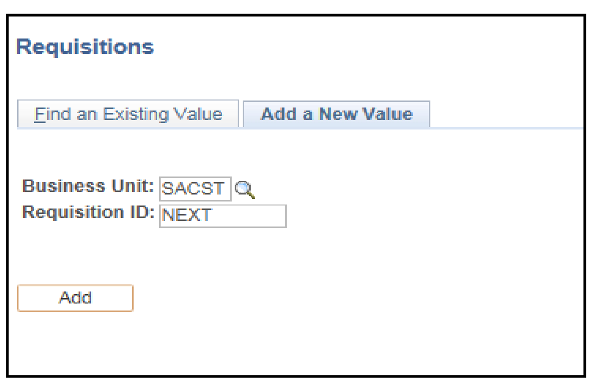
## Section 3 Creating a Requisition by Line

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

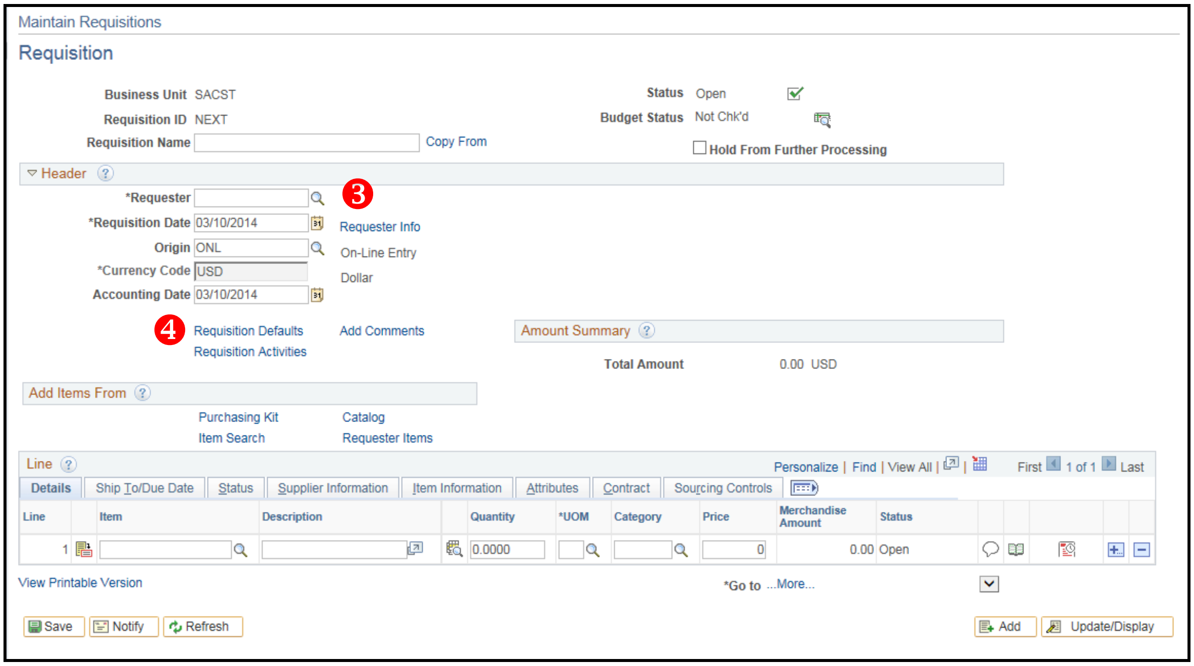
**Navigation: Purchasing > Requisitions > Add/Update Requisitions**

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.




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.

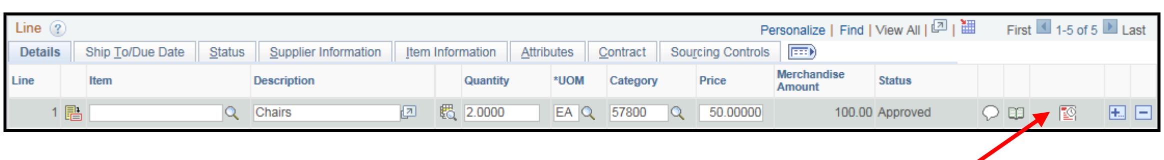
   - **Description**: Enter the description of the product or service. If you need to add more information than this field will accommodate, use the Add Comments link.

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

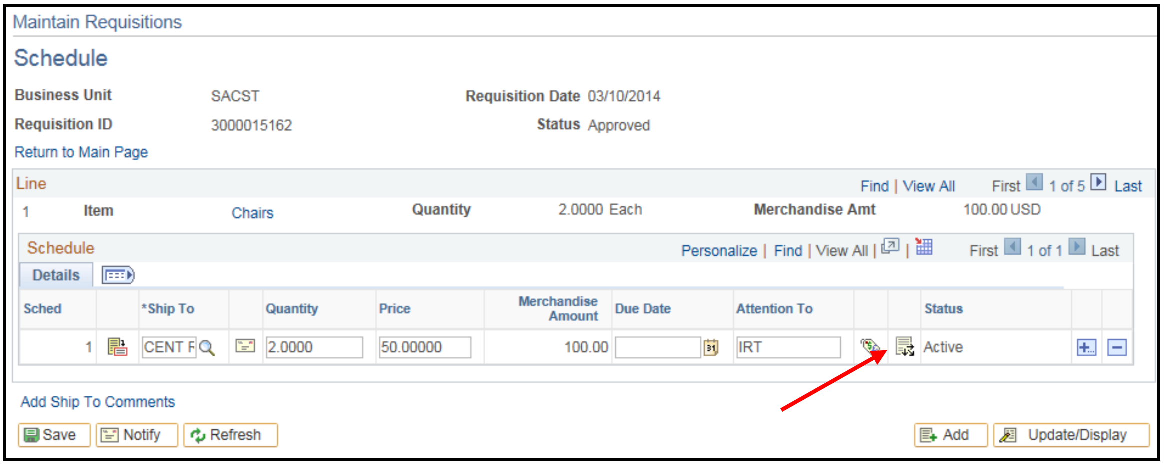
   - **UOM**: Enter the Unit of Measure. Select **EA** for all commodities (57800) or **DLR** (96200) for all services.

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

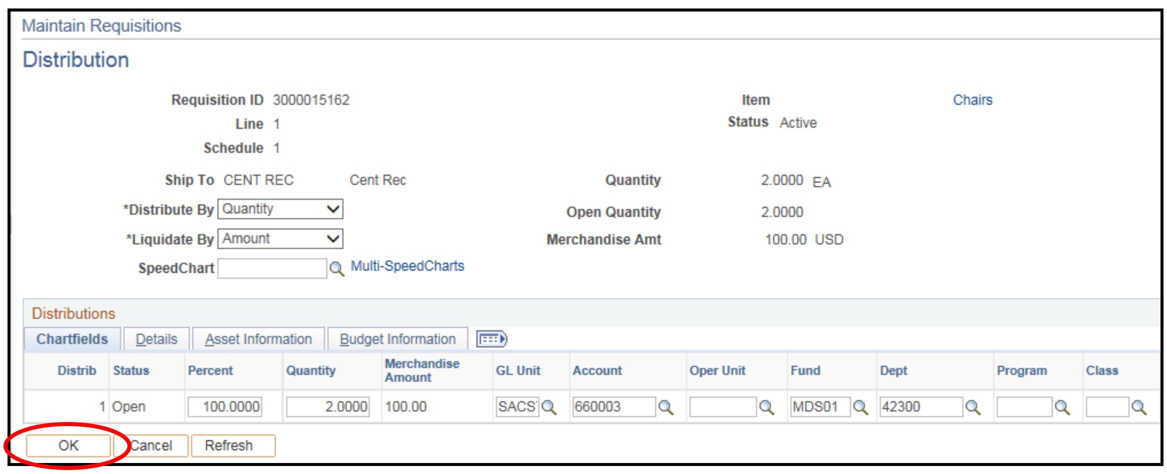
   - **Price:** Enter the unit **Price**.




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




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



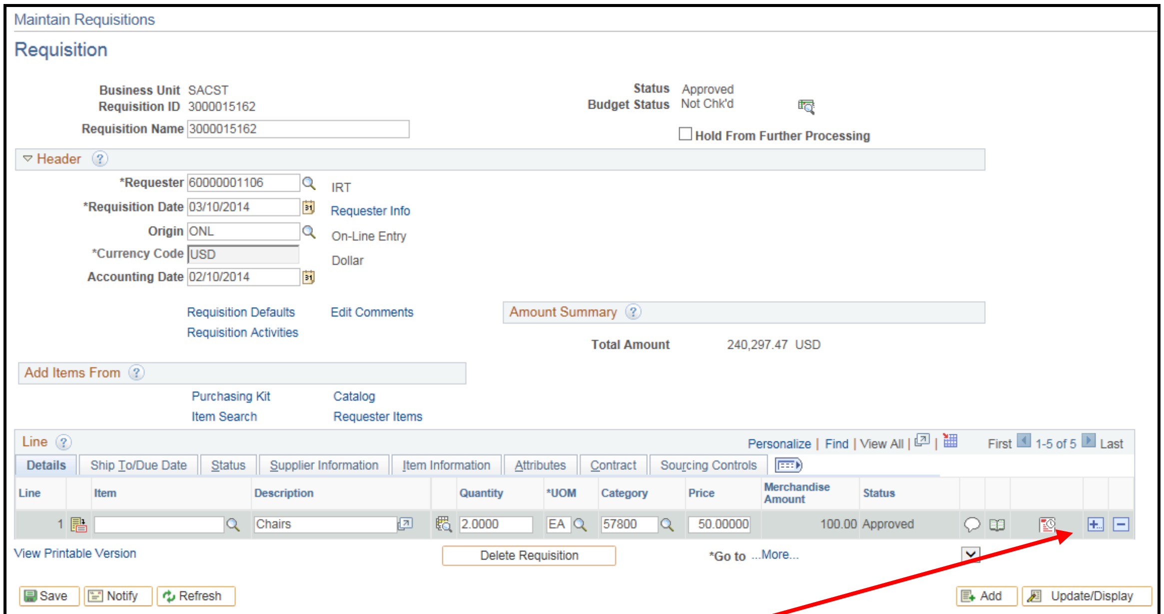

7. In the lower portion of the Distribution screen make sure the **chartfields** tab is selected. Fill in the chartstring information as follows:

- **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.*

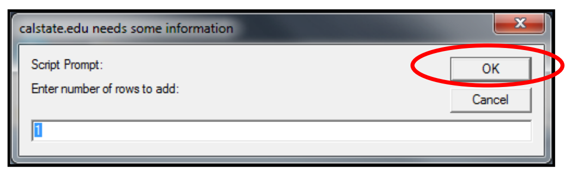
8. Click the **OK** button to return to the Schedule page.

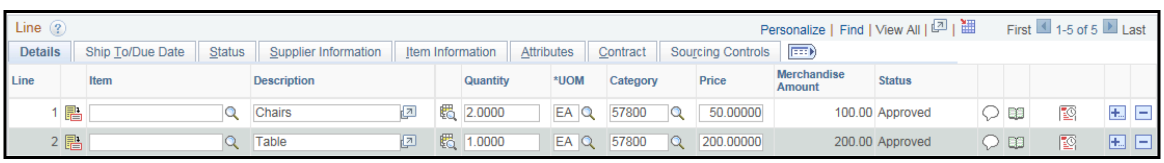
9. Click on the **Return to Main Page** link to return to the Maintain Requisitions page.




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.




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.*

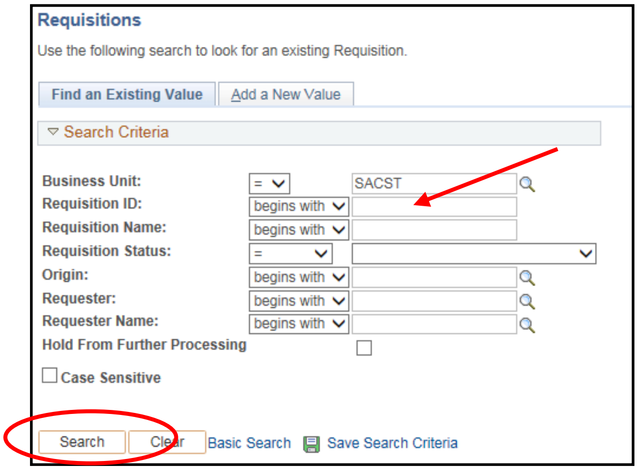
- There must be more than one line in order to delete it from a requisition.
- If you attempt to delete a single line you will receive an error message saying: "Cannot delete first line on requisition".

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

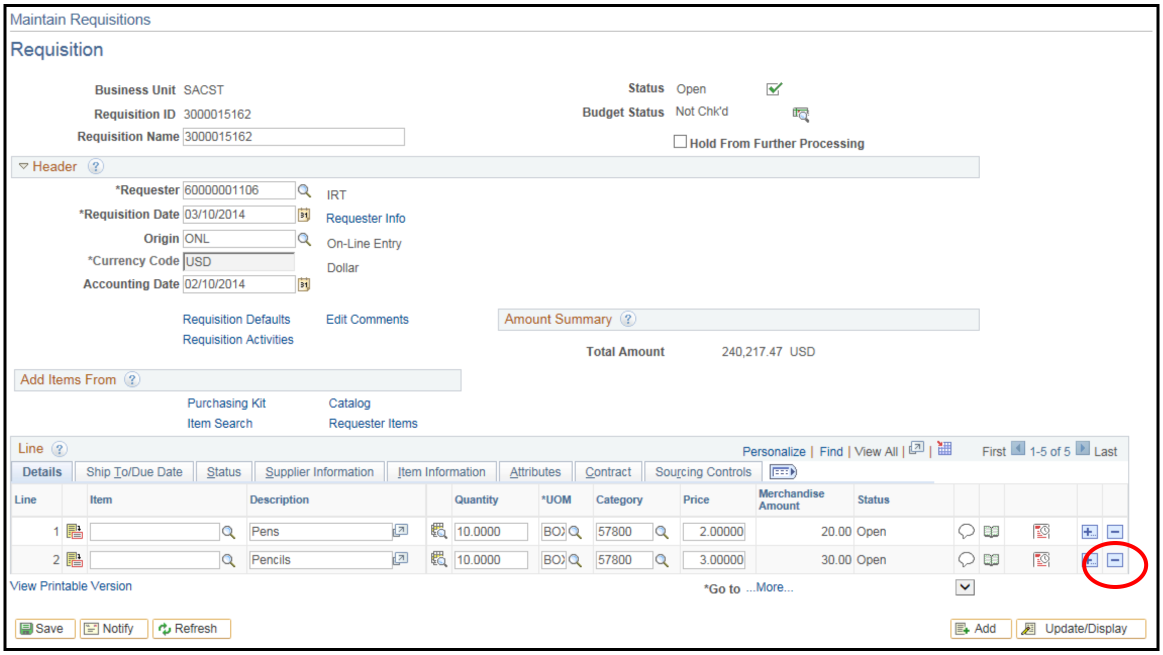
## 4.1 Delete a Requisition Line

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.



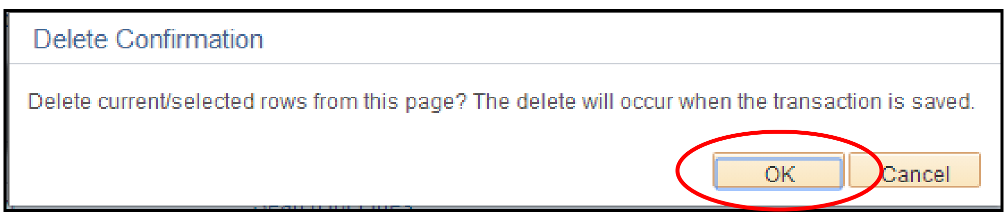
The **Maintain Requisition** page will display.



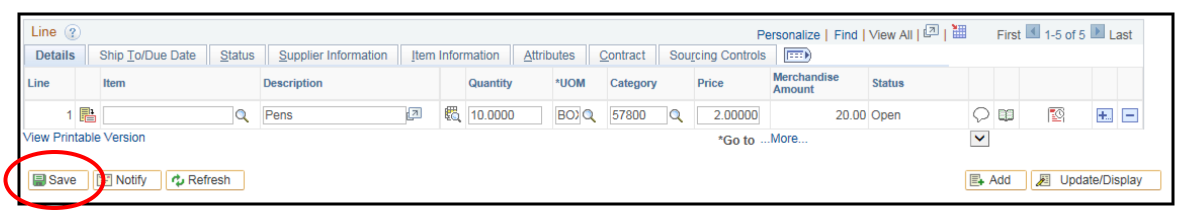

4. Click the minus icon next to the line you want to delete.

A confirmation dialog box will display.

5. Click the **OK** button.




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.



## 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.

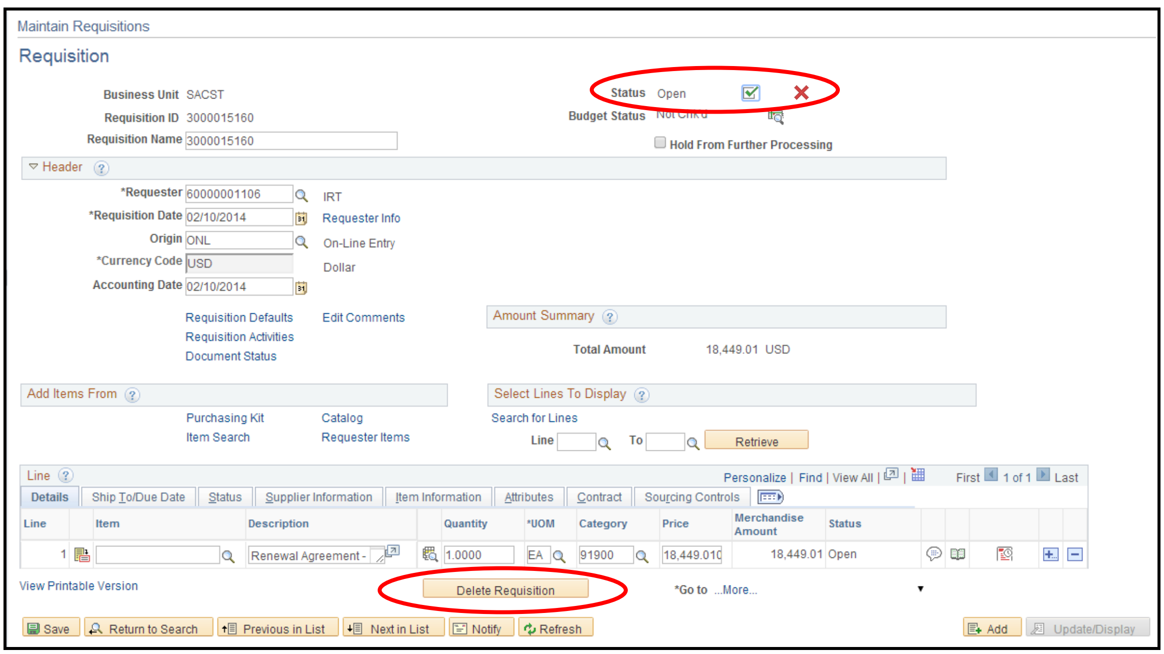
A requisition can be deleted before it is saved or after it is saved and assigned a Requisition ID number however, it cannot be deleted if it has been approved or budget checked.

**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.



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**

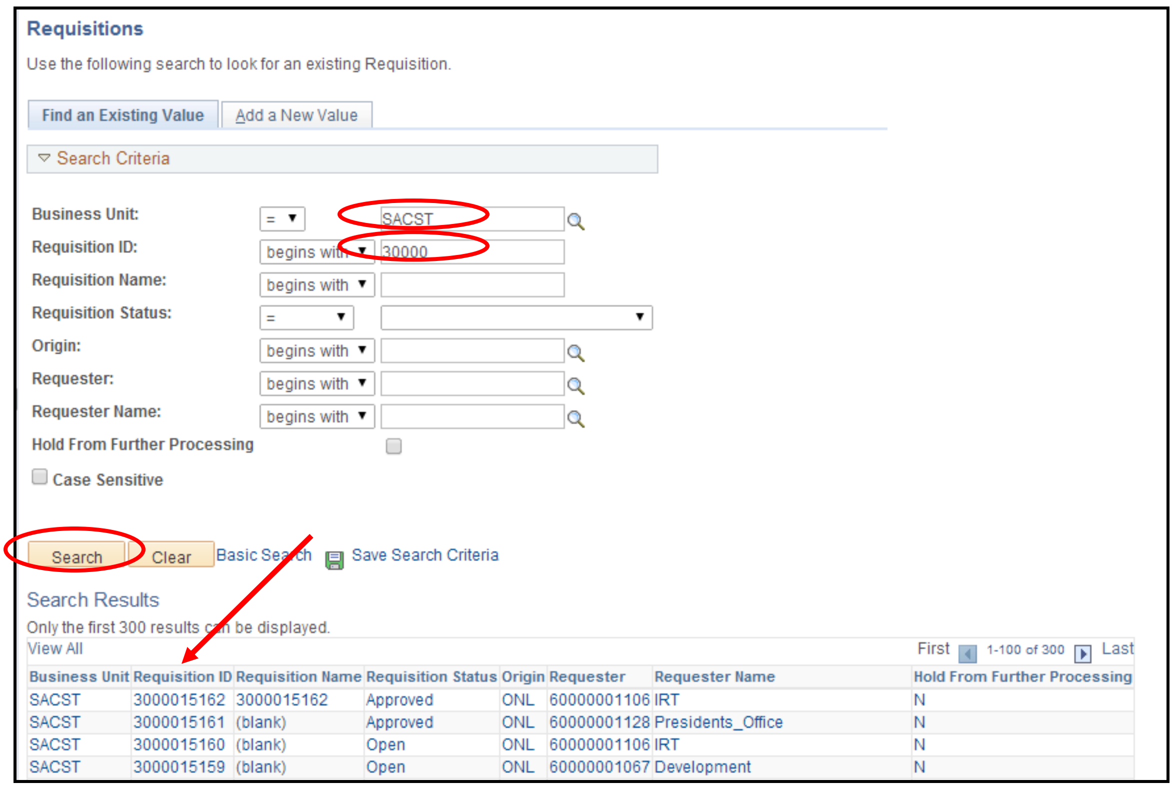
1. On the Requisitions search page, click the **Find an Existing Value** tab.

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 First 1-100 of 300 Last

| 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.

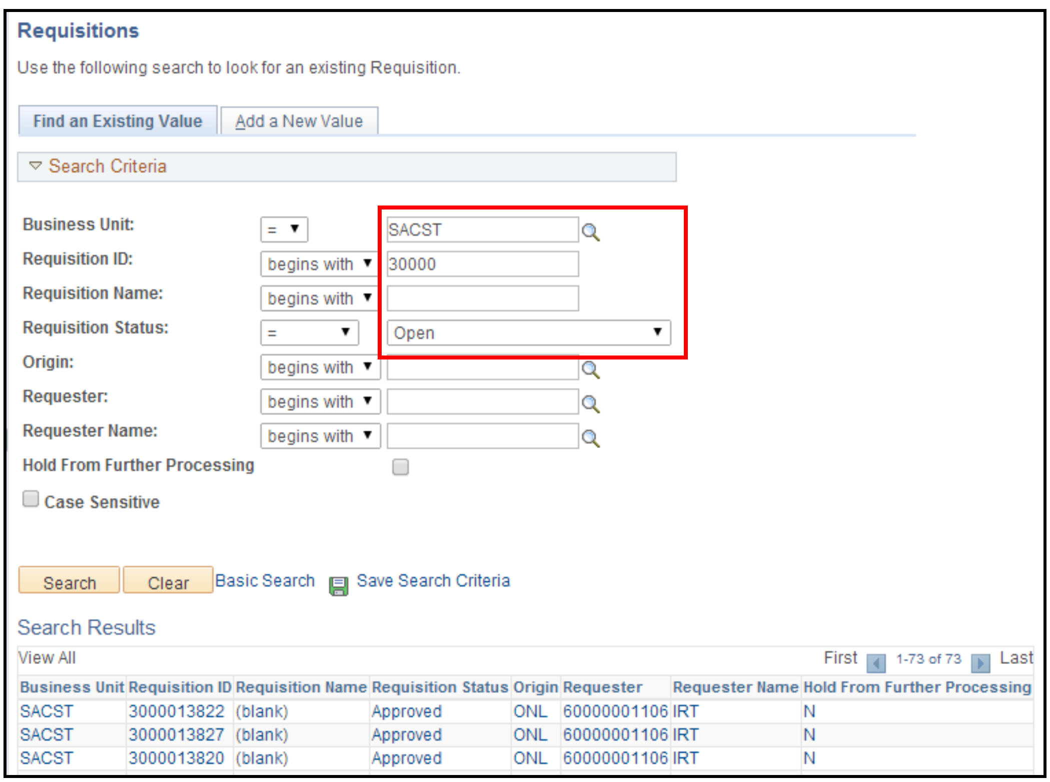
> **NOTE**: *Before a requisition can be Budget Checked or sourced to a PO, it must be approved.*

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.



## 6.2 Approve a Requisition

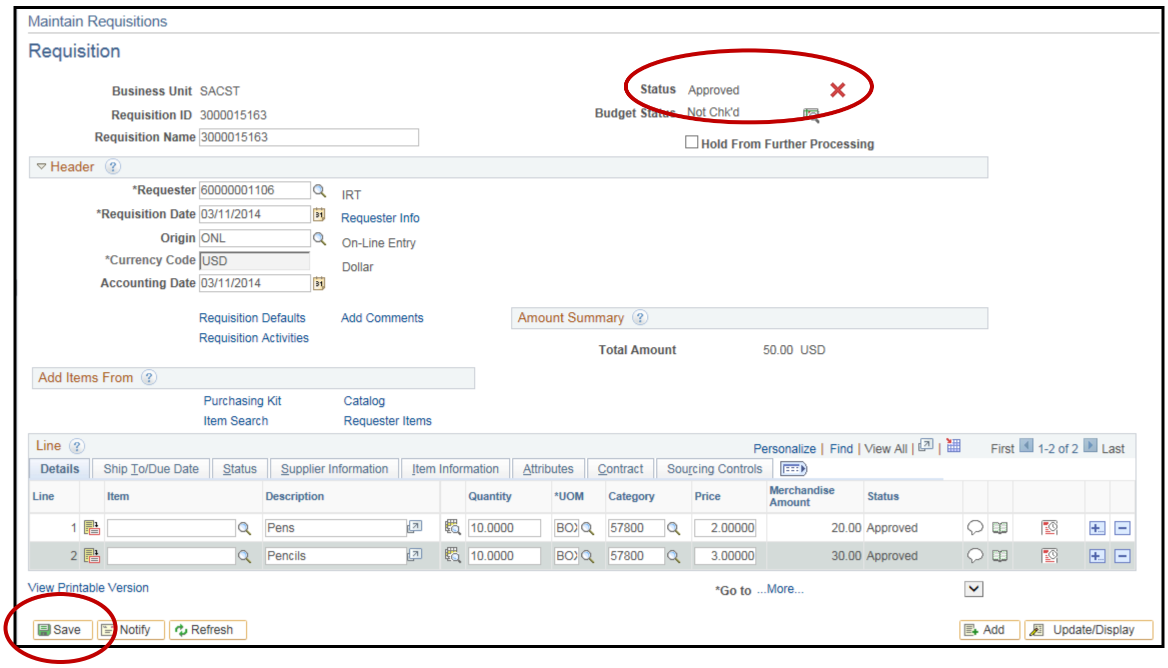
Select the desired requisition from the **Search Results** list by clicking on the **Requisition ID** link.

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.



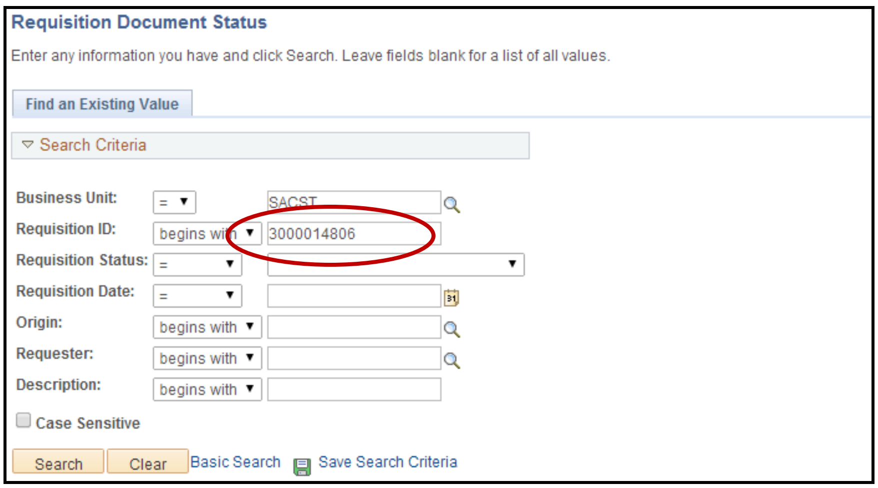
# Section 7 Review Requisition Information and Reports

## 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.

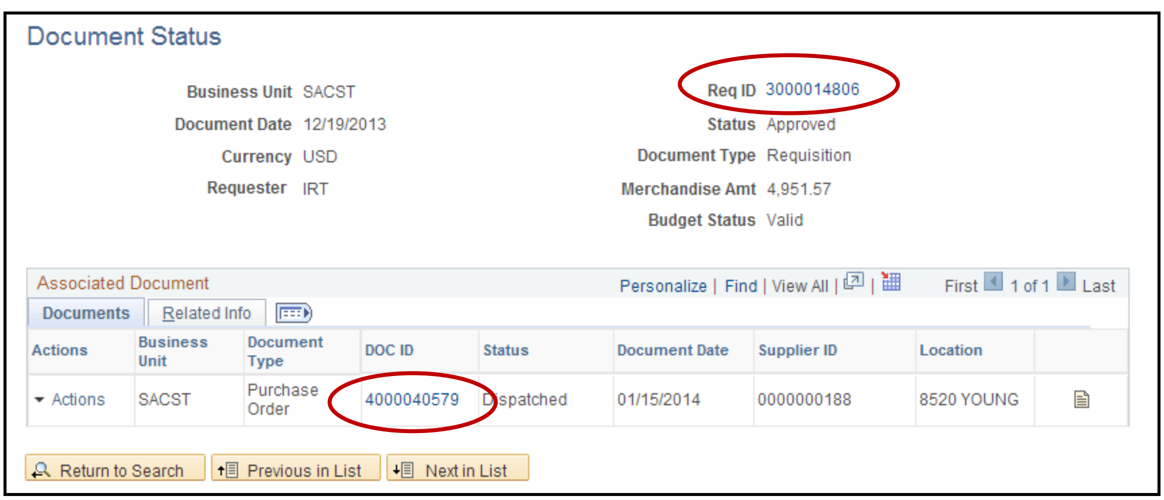
**Navigation: Purchasing > Requisitions > Review Requisition Information > Document Status**

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.



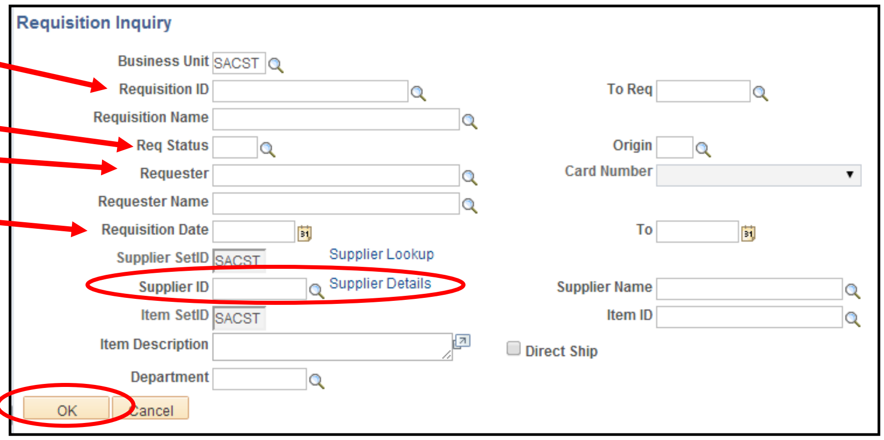
## 7.2 Reviewing Requisition Information

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

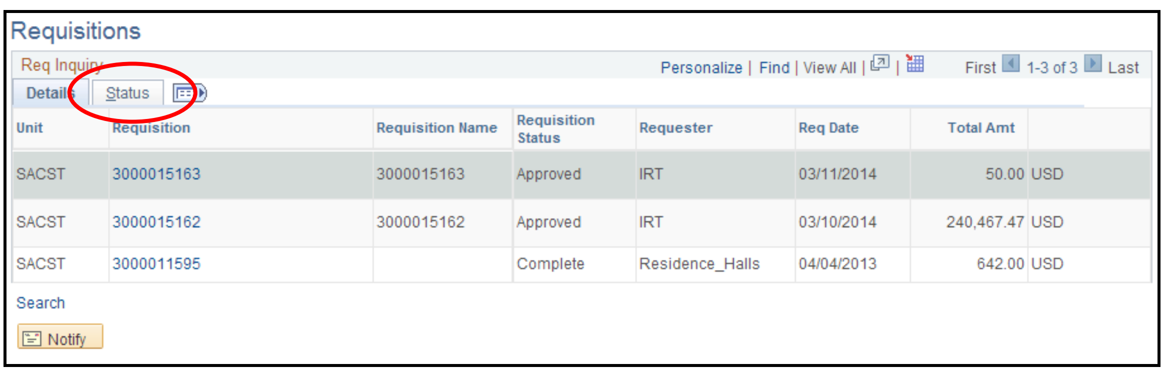
**Navigation: Purchasing > Requisitions > Review Requisitions Information > Requisitions**

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




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**.

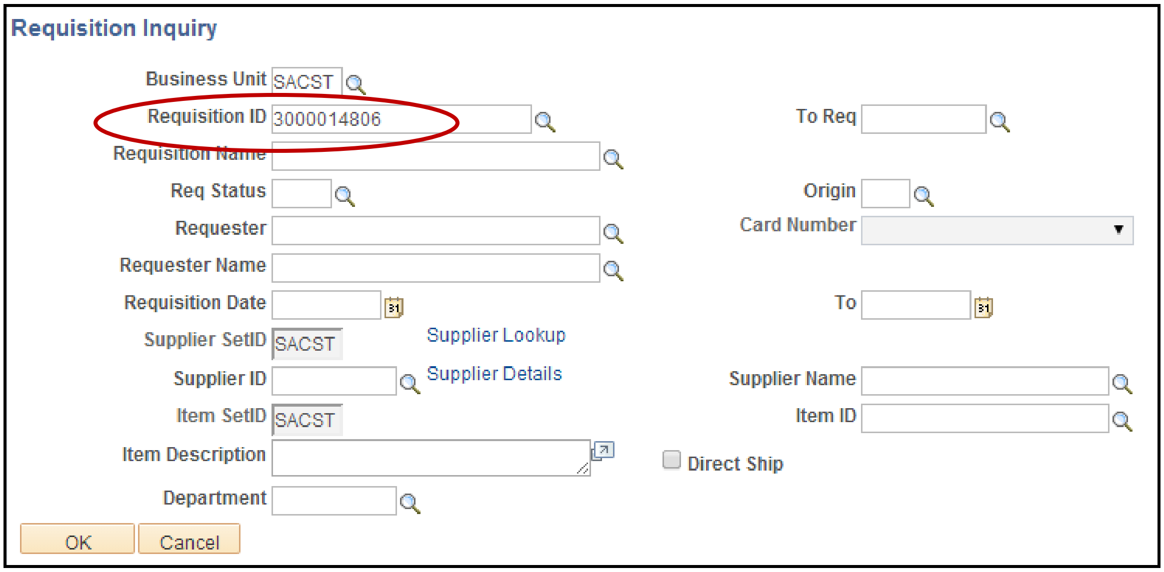



| Unit | Requisition | Requisition Name | Requisition Status | Requester | Req Date | Total Amt | |
|---|---|---|---|---|---|---|---|
| SACST | 3000015163 | 3000015163 | Approved | IRT | 03/11/2014 | 50.00 | USD |
| SACST | 3000015162 | 3000015162 | Approved | IRT | 03/10/2014 | 240,467.47 | USD |
| SACST | 3000011595 | | Complete | Residence_Halls | 04/04/2013 | 642.00 | USD |

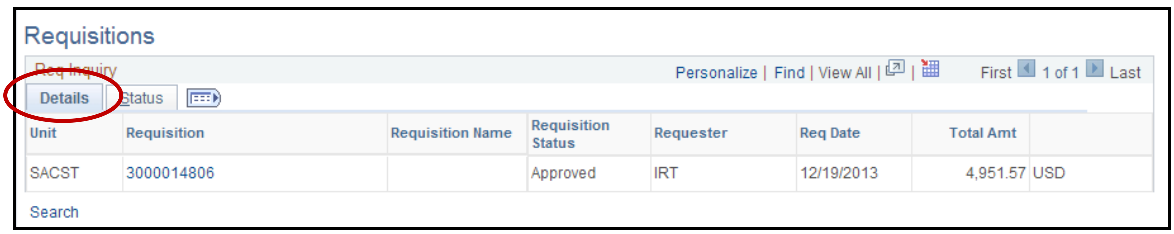


A list of all requisitions assigned to that vendor will display on the Requisition Inquiry screen. Click on the desired **Requisition** number link to review the Requisition details.

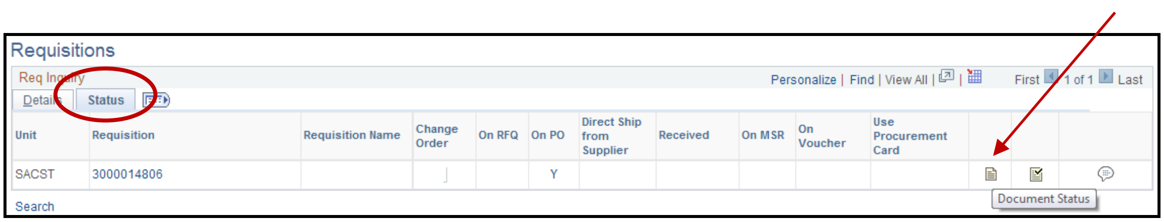
If you know a specific **Requisition ID** that you wish to review, enter it into the Requisition ID field on the search screen and click the **OK** button.



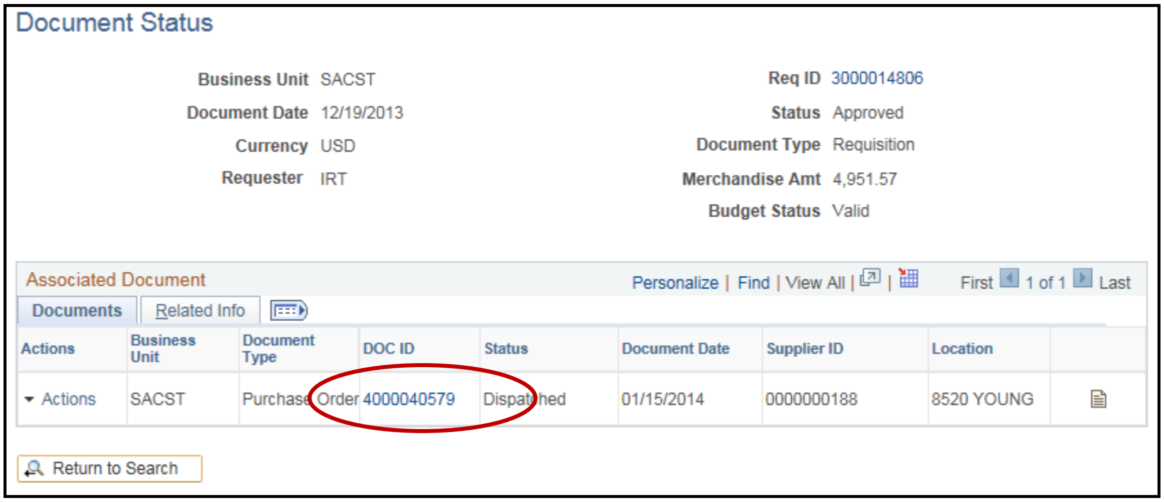

The Requisition Inquiry screen will display the details of that requisition.




Click on the **Status** tab.




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.




Your PO number will display in the DOC ID column.

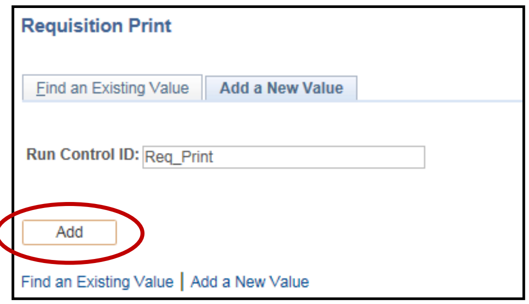
# Section 8 Printing a Copy of the Requisition

## 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.

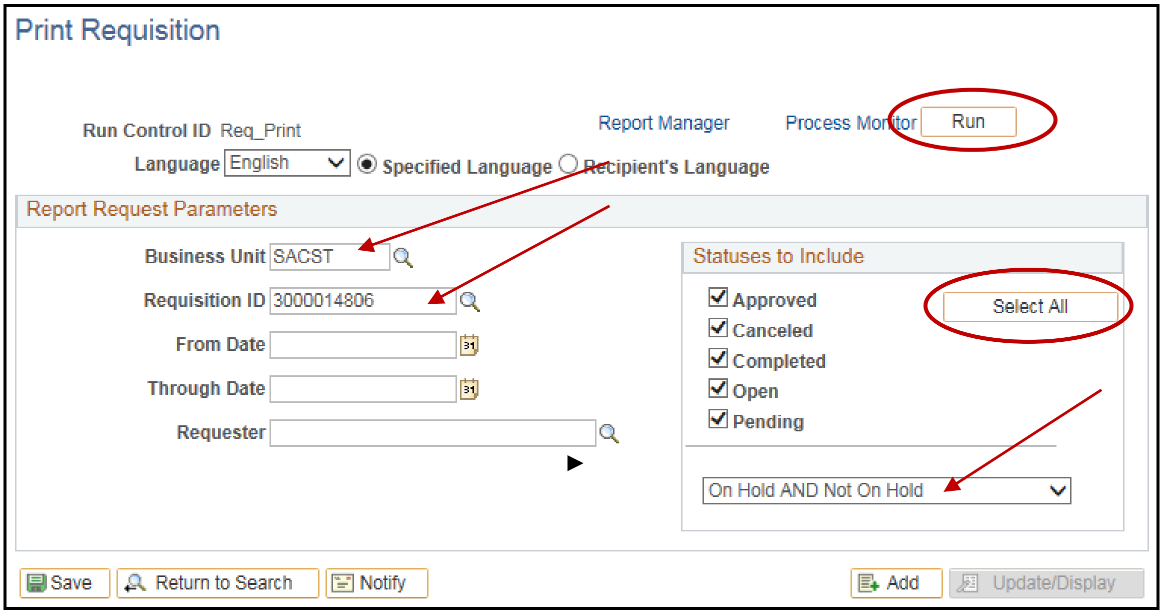
**Navigation: Purchasing > Requisition > Reports > Print Requisition**

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 **Requisition Prin**t screen will display. To print a requisition for your department's files, enter the following information.

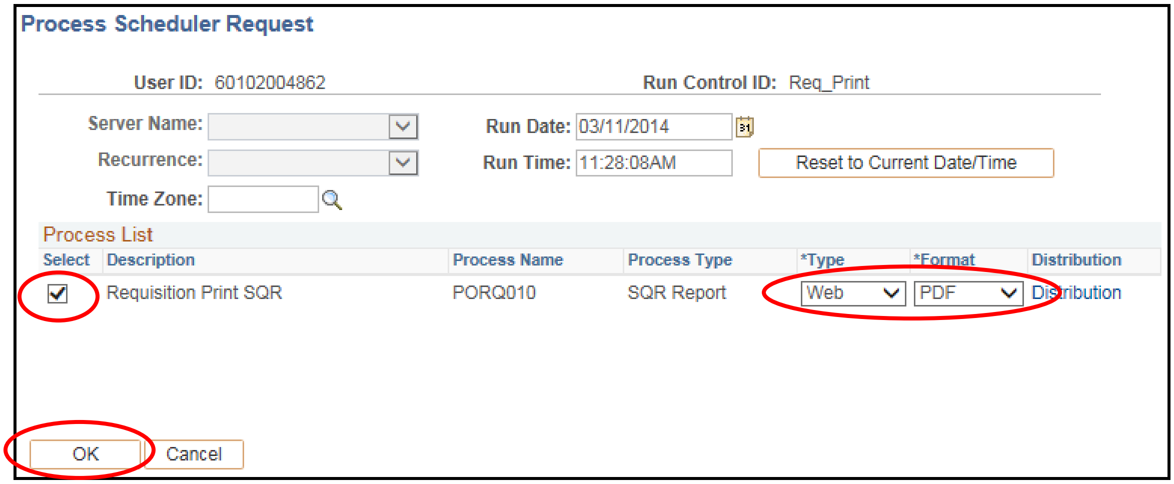
4. In the Business Unit field, enter **SACST**.
5. Enter the **Requisition ID**
6. In the **Statuses to Include** section, make sure ALL checkboxes are selected by clicking the **Select All** button.
7. Make sure the drop down menu defaults to "**NOT On Hold**"
8. Click the **Run** button.


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
Select All
On Hold AND Not On Hold
Save
Return to Search
Notify
Add
Update/Display

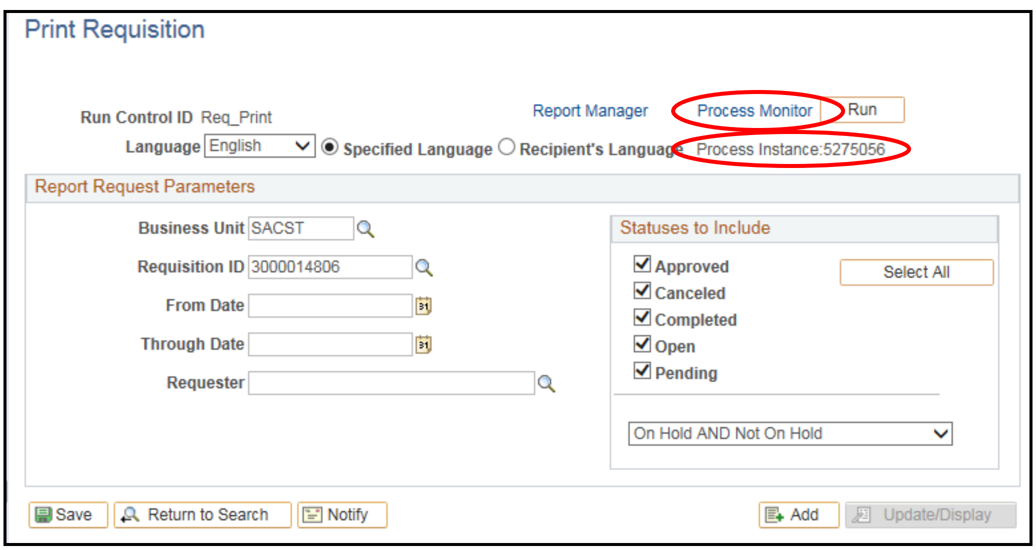
The **Process Scheduler Request** page will display.

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.

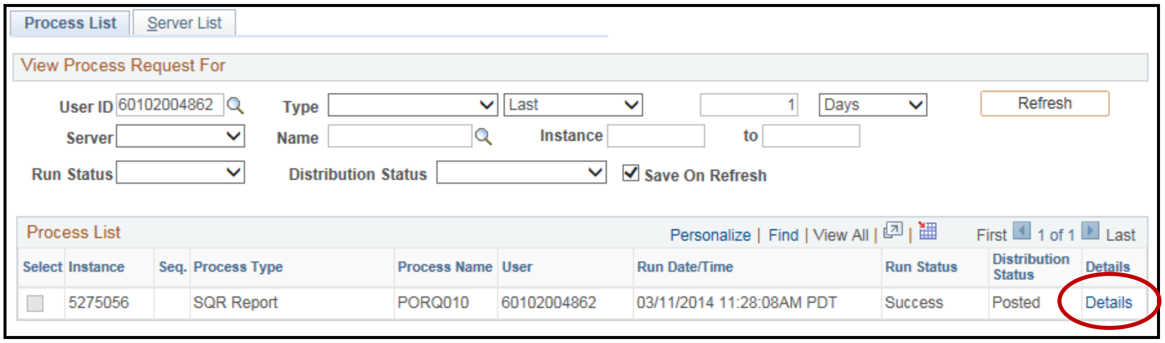



The Requisition Print screen will re-display, this time showing a Process Instance number. Click the **Process Monitor** link.

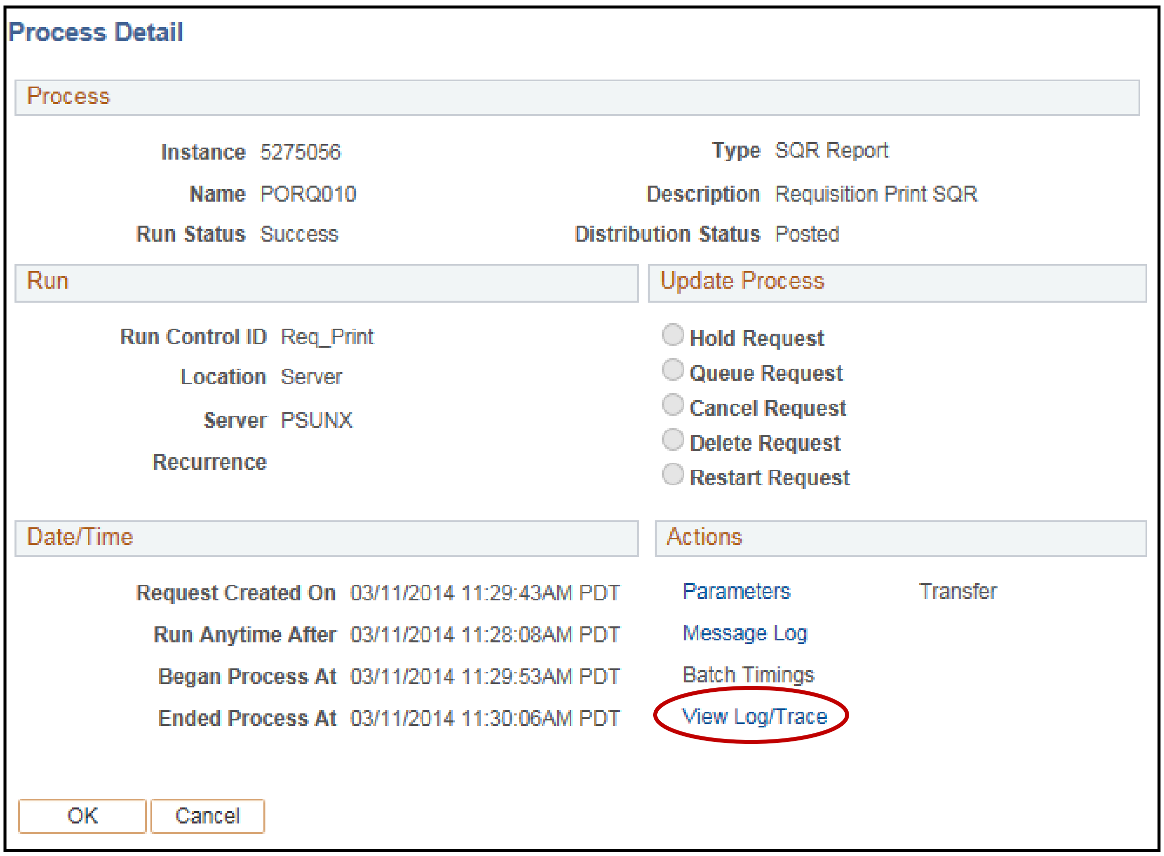



On the View Process Request page, click the refresh button until the run status for your instance displays **Success** and the Distribution Status displays **Posted**.

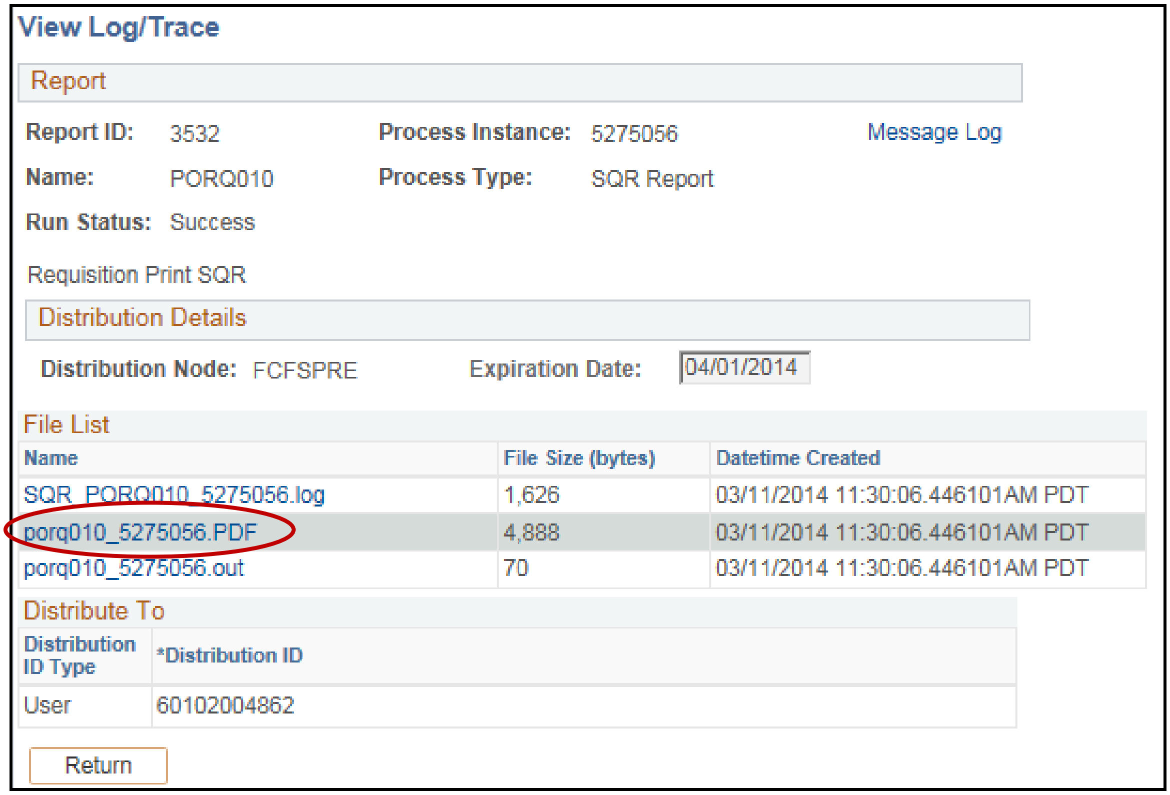
When it is finished processing, click the Details link.



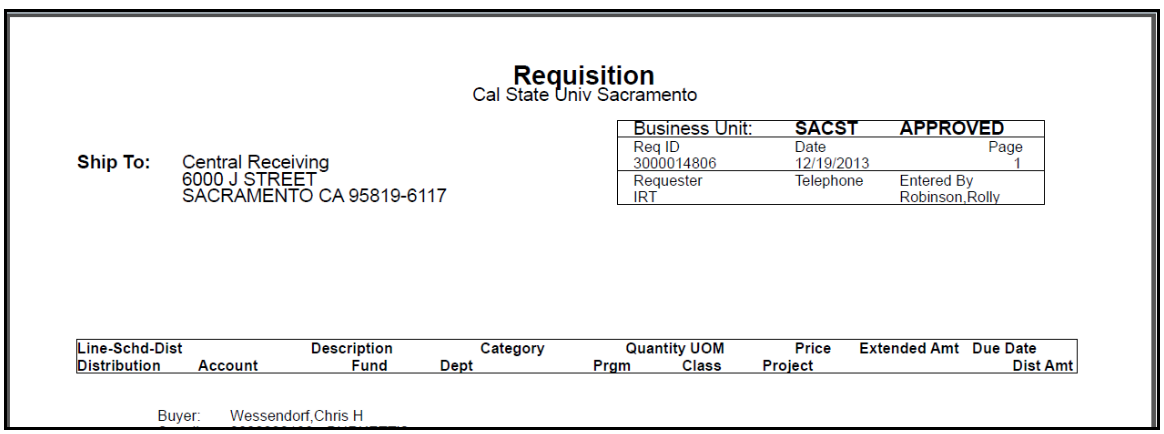

On the **Process Detail** screen, click the **View Log/Trace** link at the bottom of the screen.



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



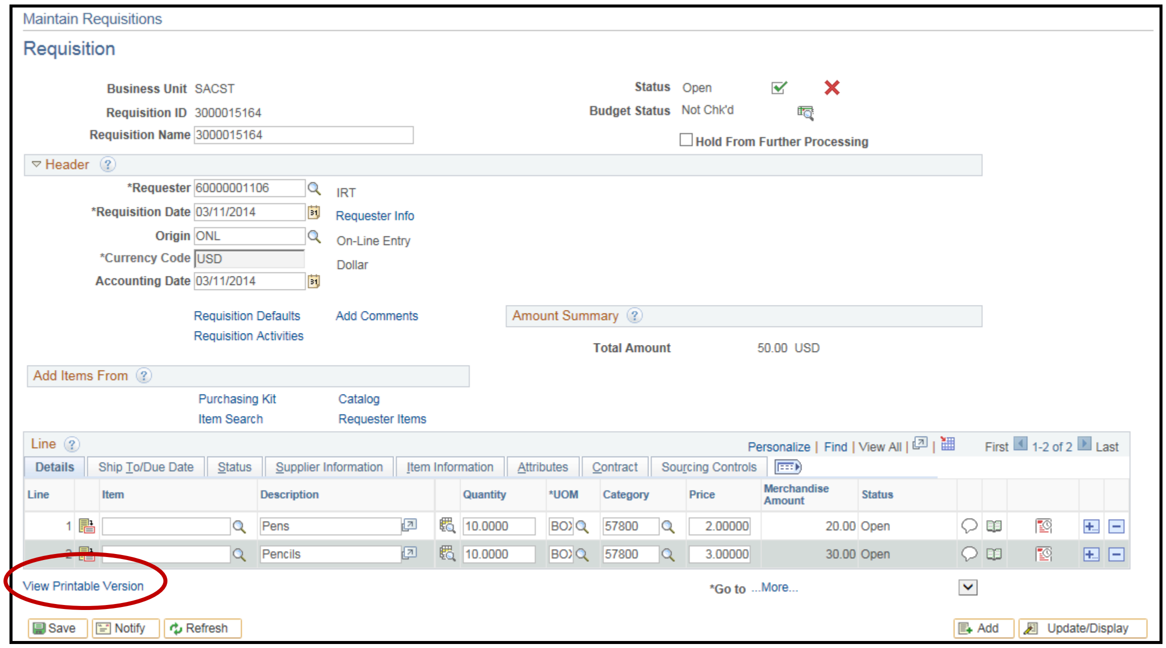

To print the report, click on **print** icon in your browsers toolbar or menu.



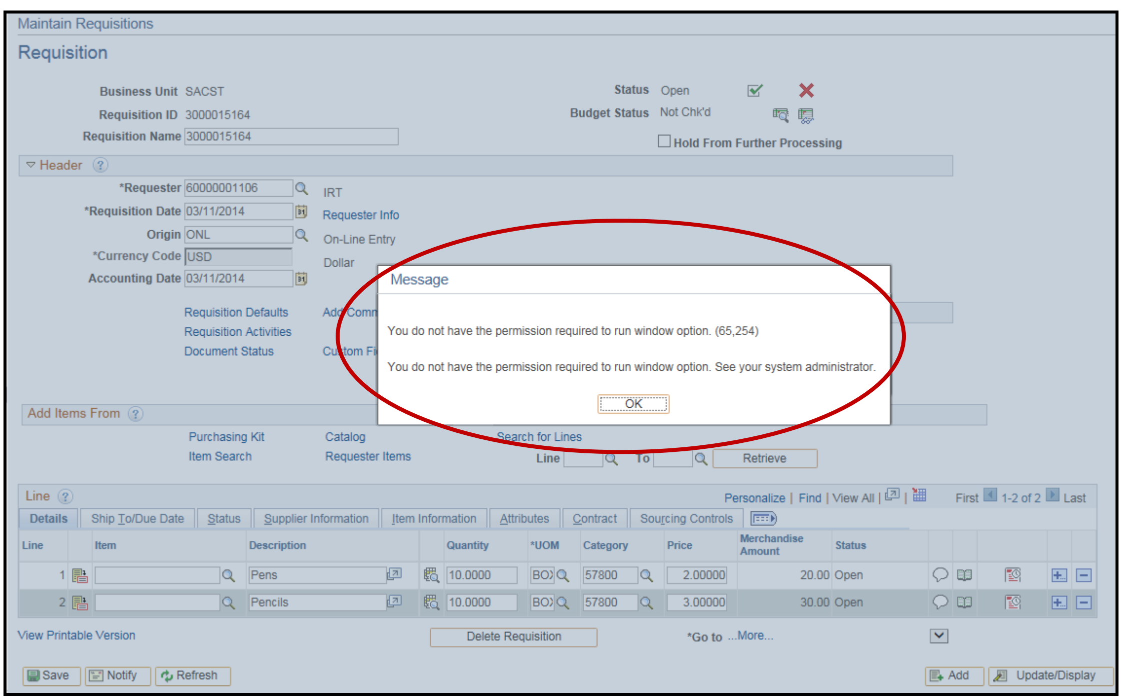
## 8.2 Printing using View Printable Version

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.



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

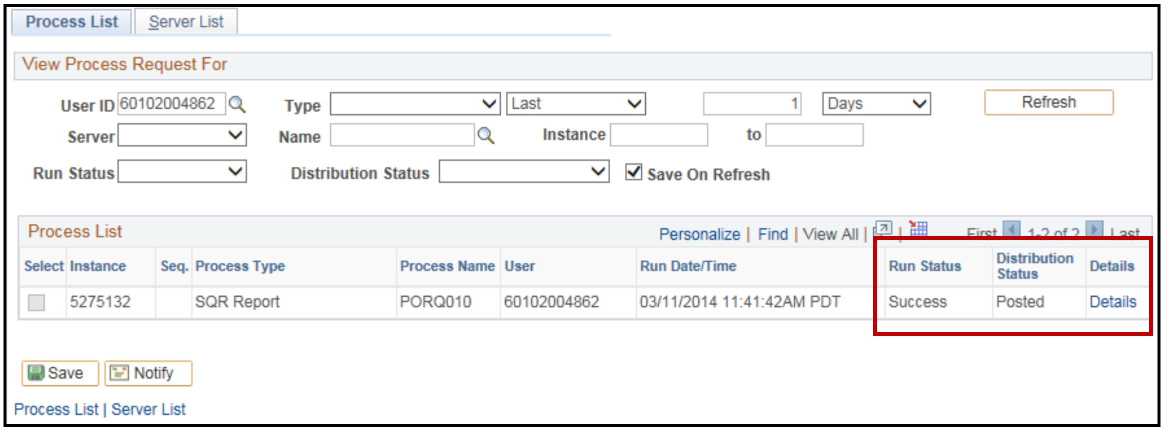


Navigate to the Process Monitor to retrieve your document.

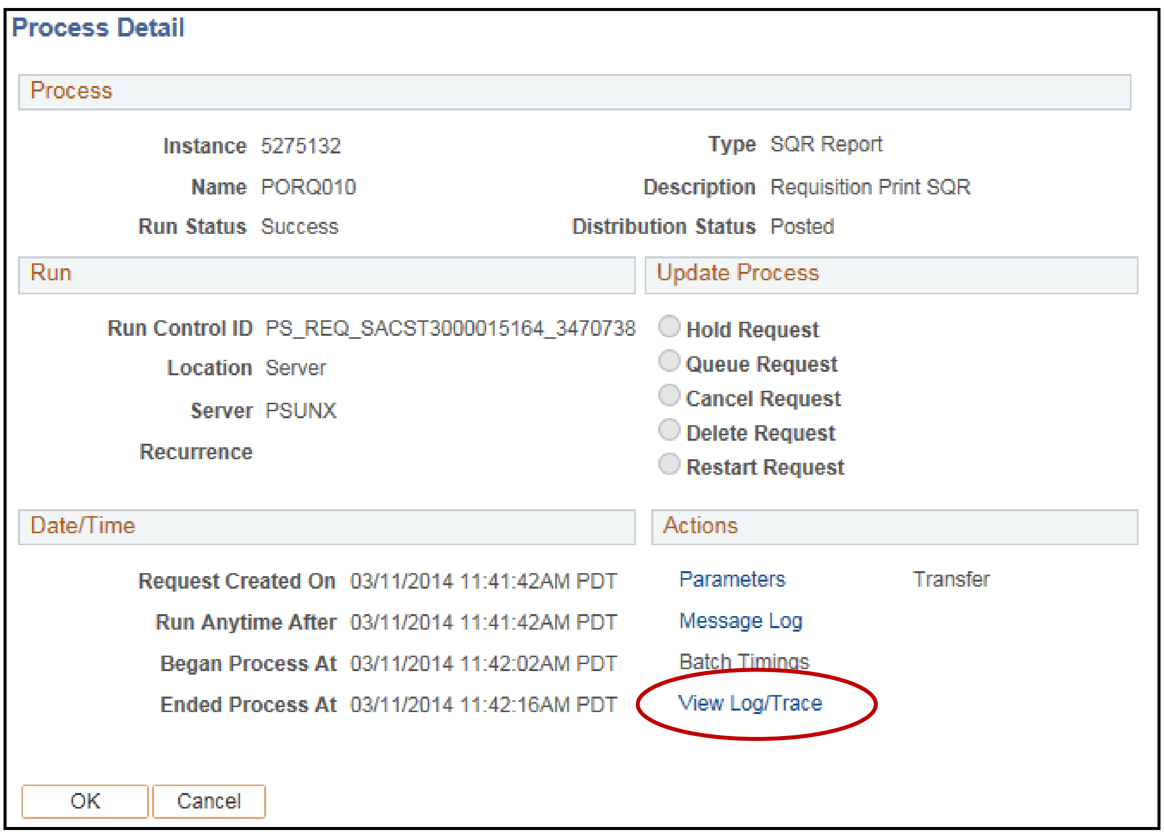
3. **People Tools** > **Process Scheduler** > **Process Monitor**.

4. Click the **Refresh** button until the Run Status is Success and Distribution Status is posted.

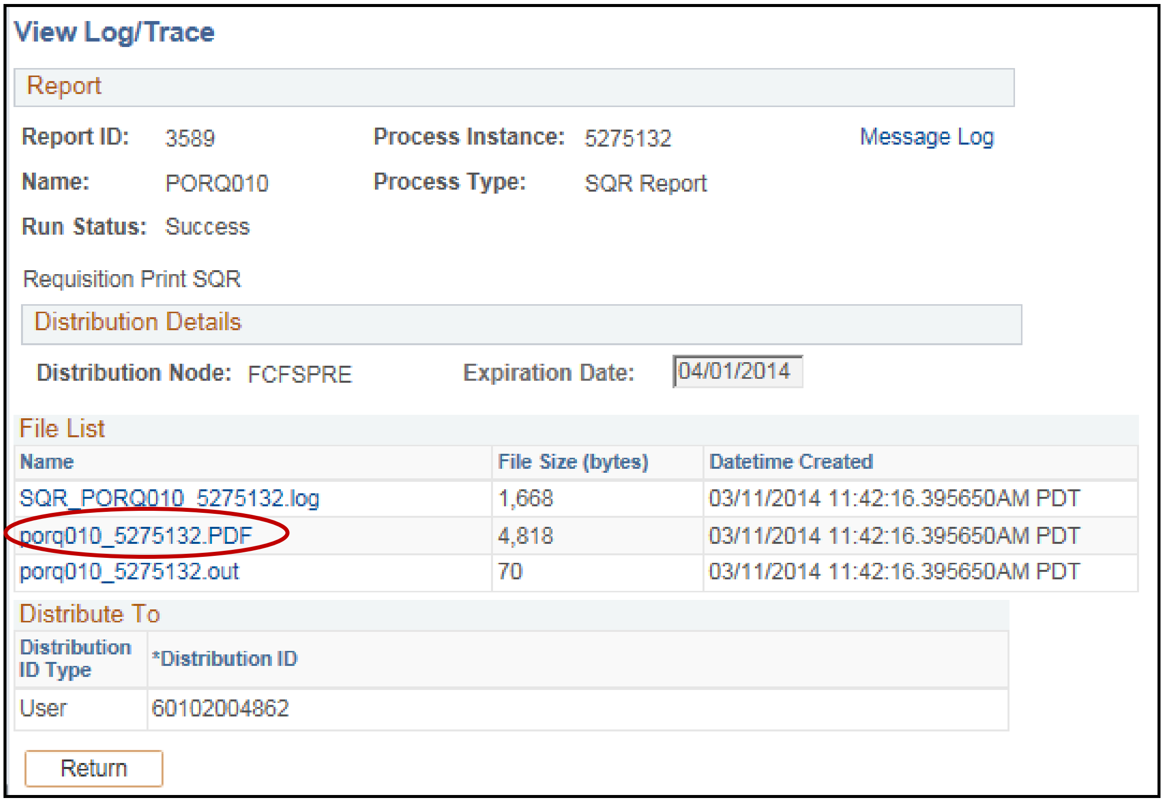
5. Click **Details** link.




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



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: FCFSPRE 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

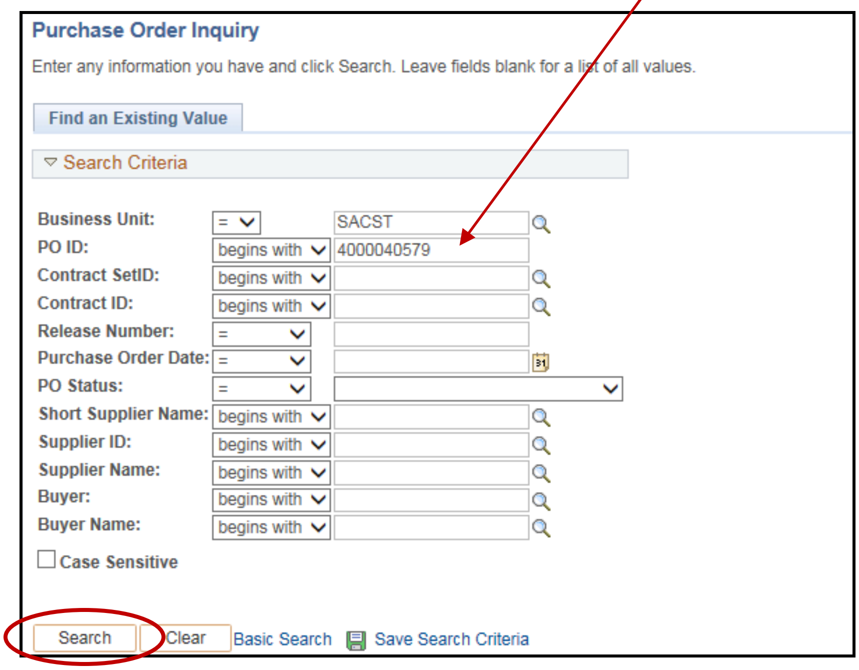
# Section 9 Review Purchase Order Information and Reports

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**

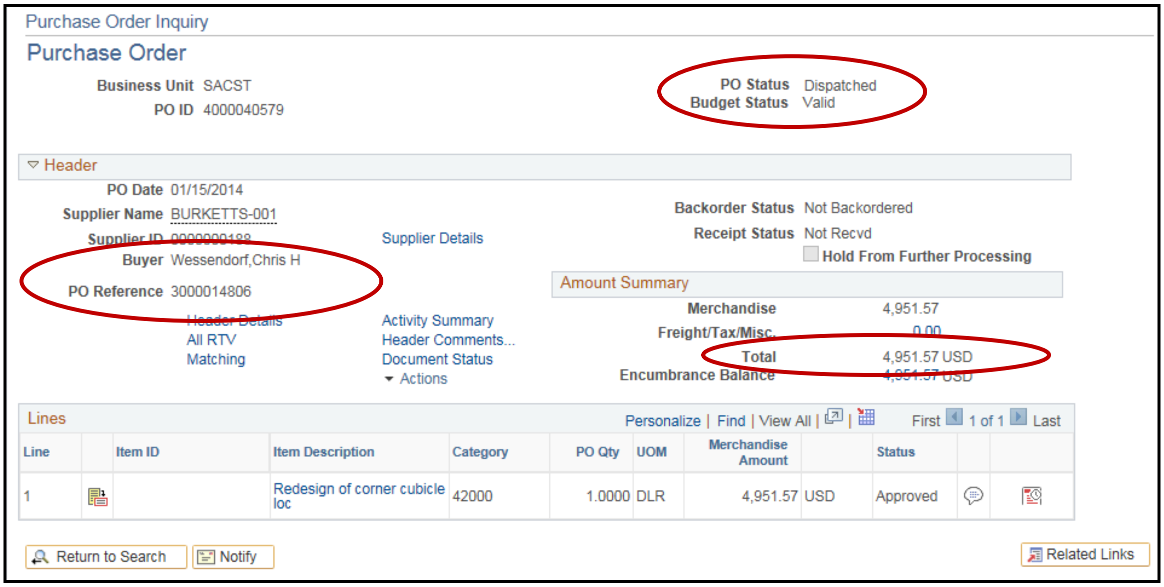
1. Enter the **Purchase Order number** in the PO ID field.
2. Click the **Search** button.
3. The purchase order screen will display.




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

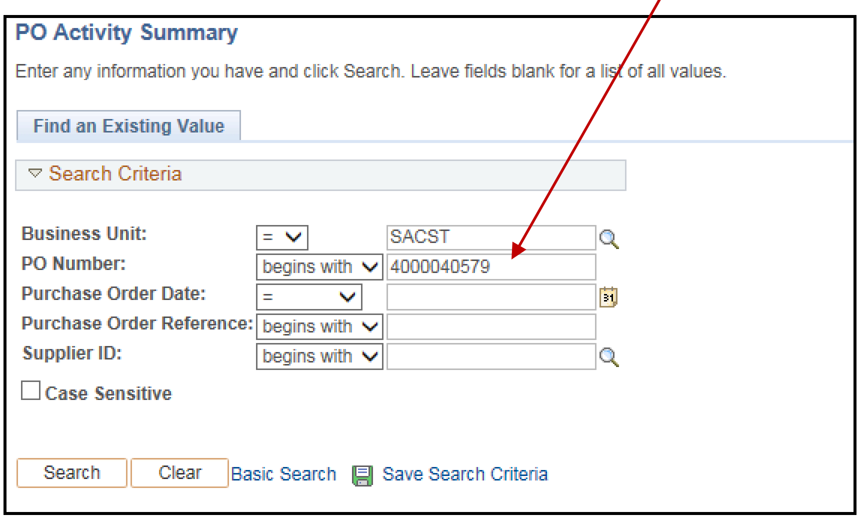
- Total Amount
- Verify Chartstring

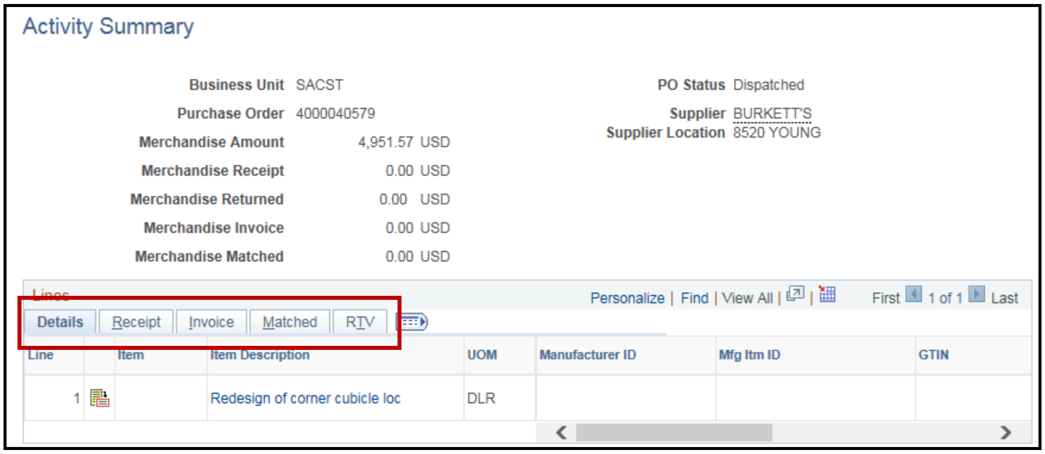



## 9.2 Inquiring Activity Summary

**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.





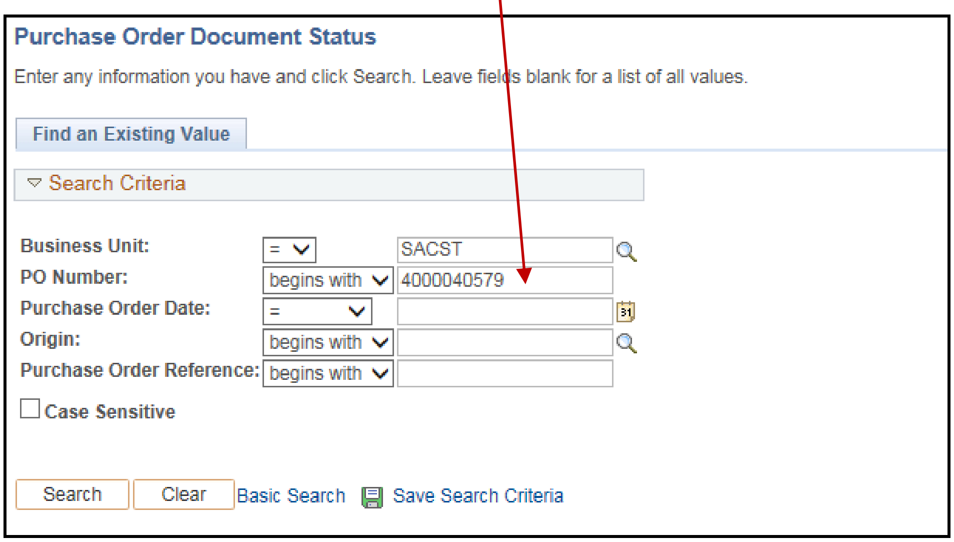

The Activity Summary page will display Purchase Order activity. Each tab will provide links to information and documents.

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

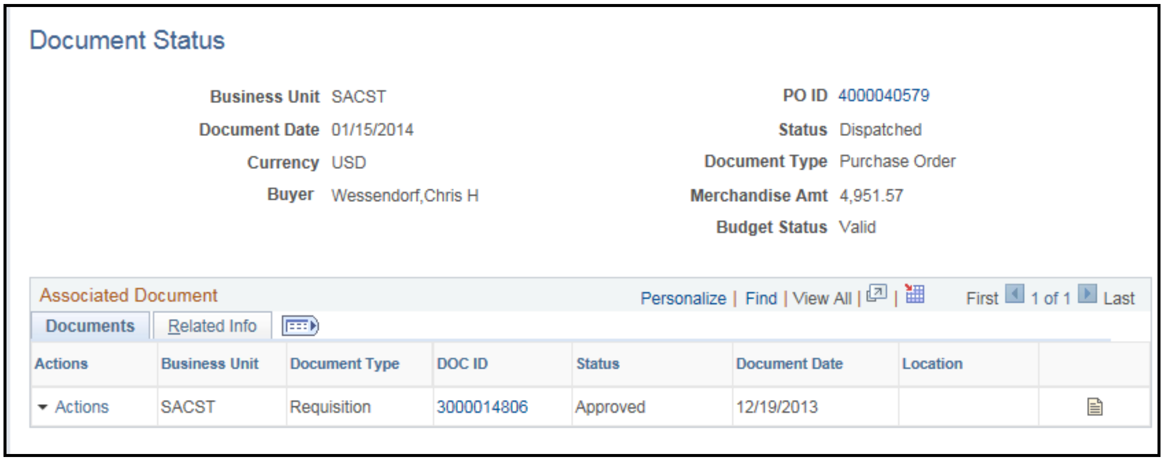
## 9.3 Viewing the Status of a Purchase Order

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

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



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.

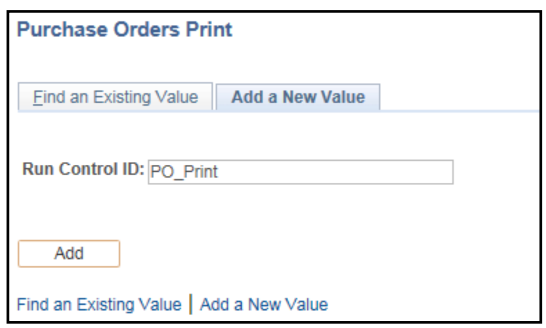



## 9.4 Printing a Copy of the Purchase Order

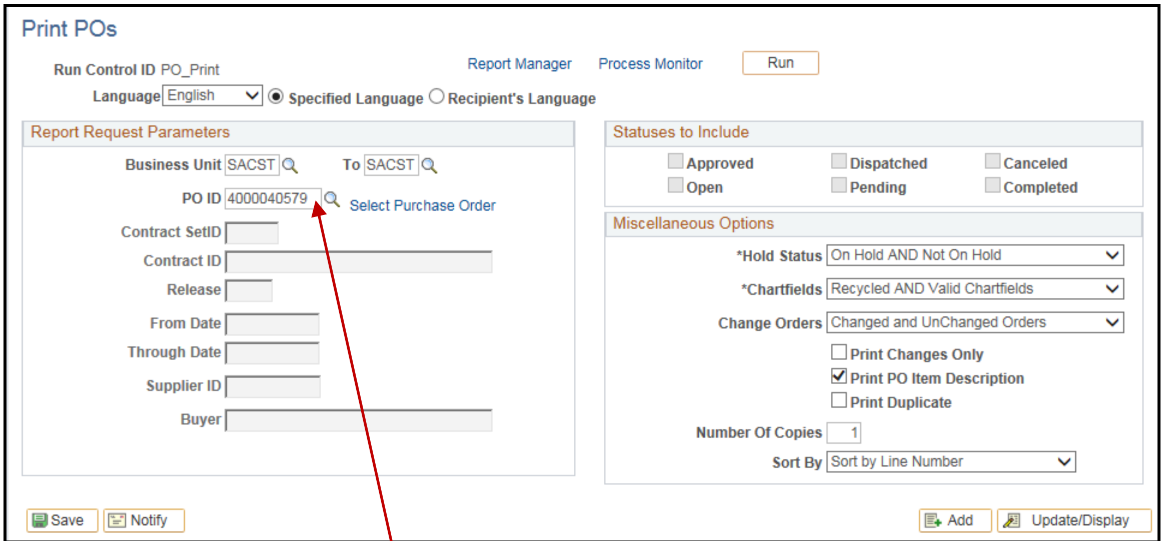
Initially a Run Control ID will need to be established. Once the Run Control ID has been set up, it can be used each time you need to print a Purchase Order.

**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

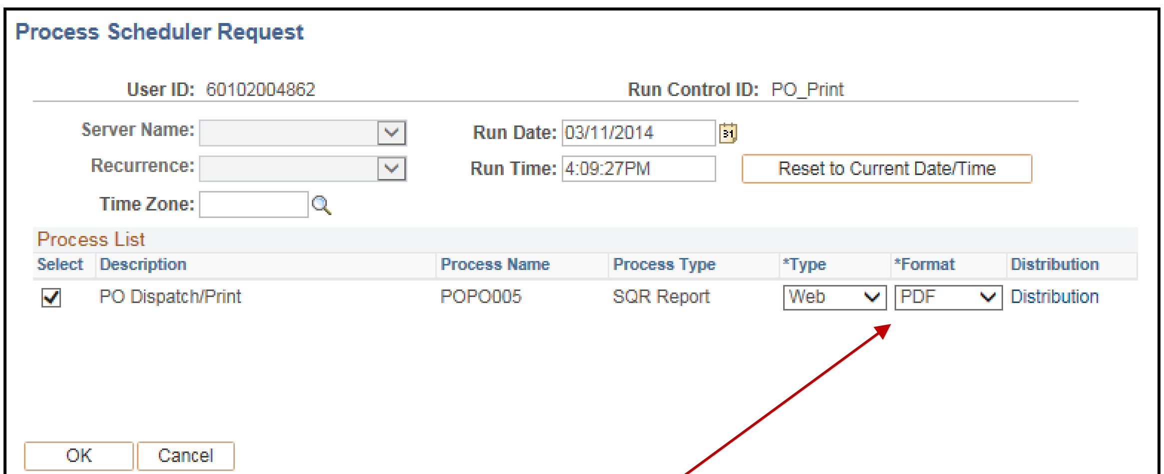


The **Purchase Orders Print** screen will display.




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

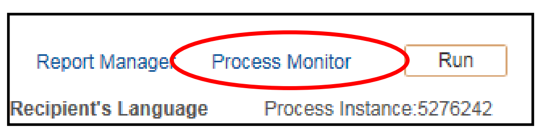
5. Click the **Run** button.

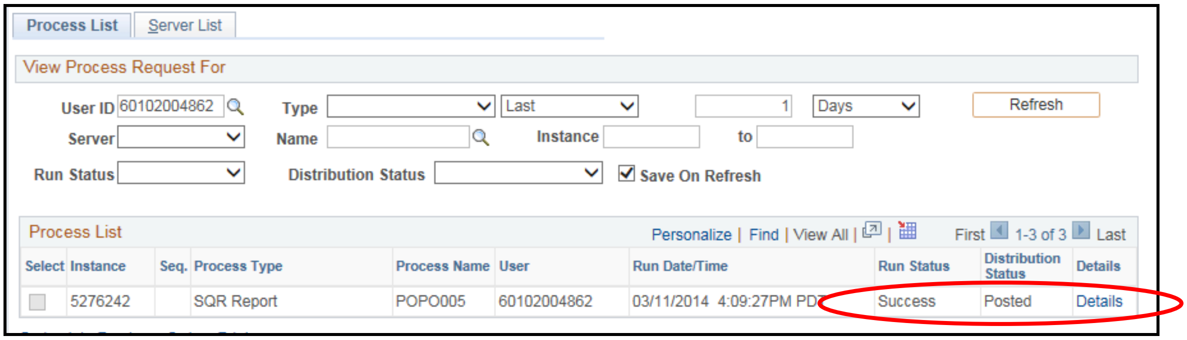



6. The **Format** field should display **PDF**.

7. Click the **OK** button.

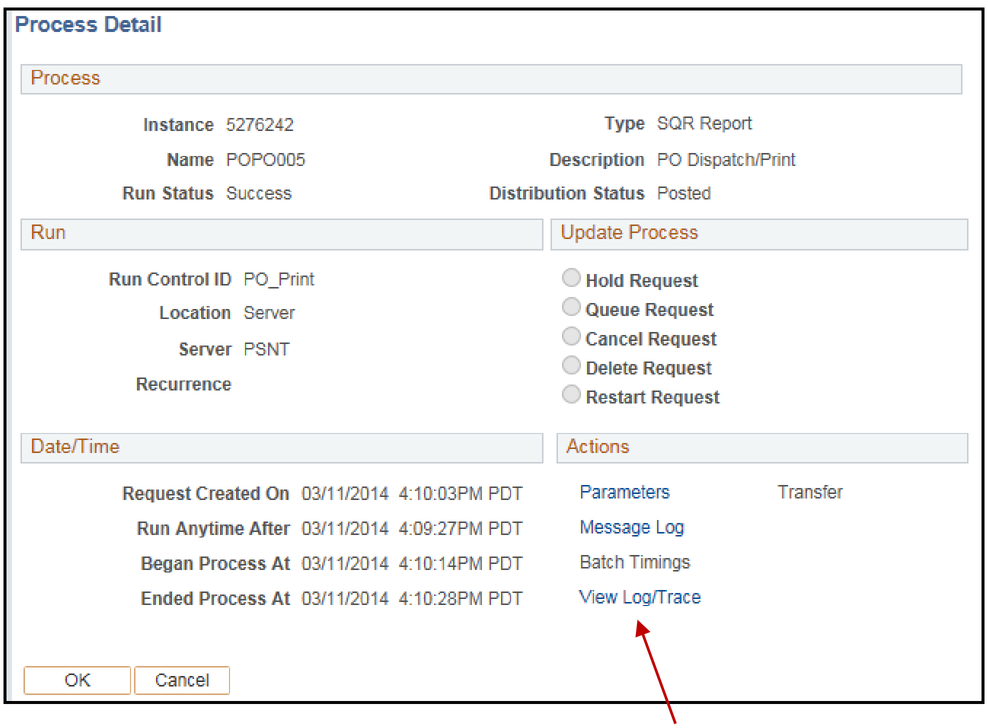
8. When the Purchase Orders Print screen re-displays, click on the Process Monitor link.





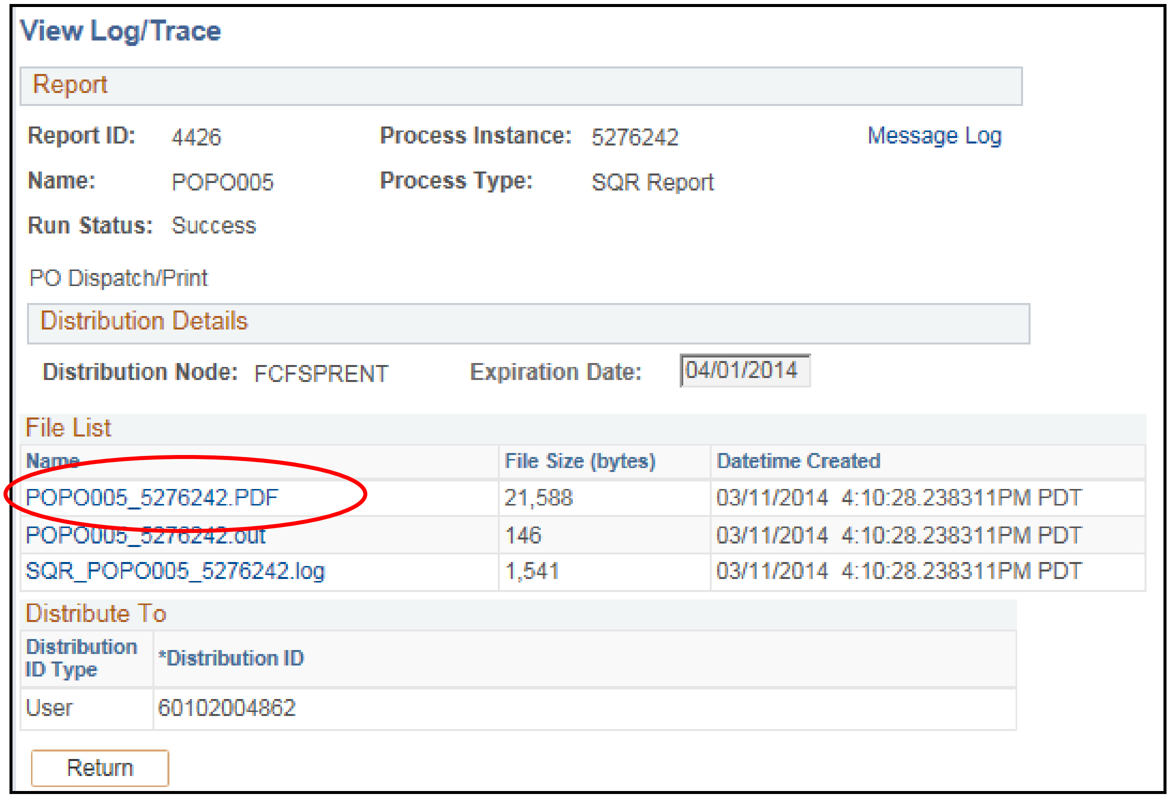

9. On the Process Monitor screen, click the Refresh button until the Run Status displays **Success** and the Distribution Status displays **Posted**.

10. Click the **Details** link




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 |
|---|---|---|
| POPO005_5276242.PDF | 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 |

Return

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

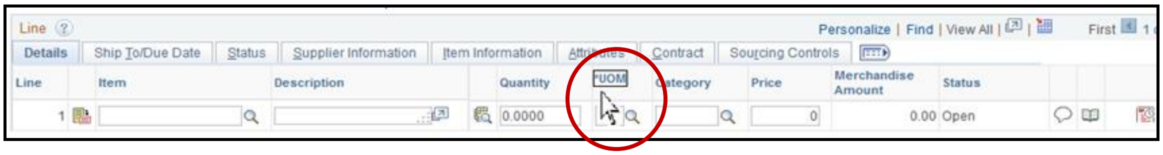
> **NOTE**: *This is an unauthorized copy of the Purchase Order. The vendor will not accept it as an authorized Purchase Order.*

# 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.

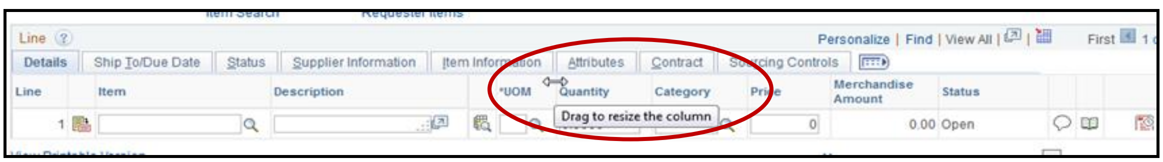
## 10.1 Reordering Fields

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.

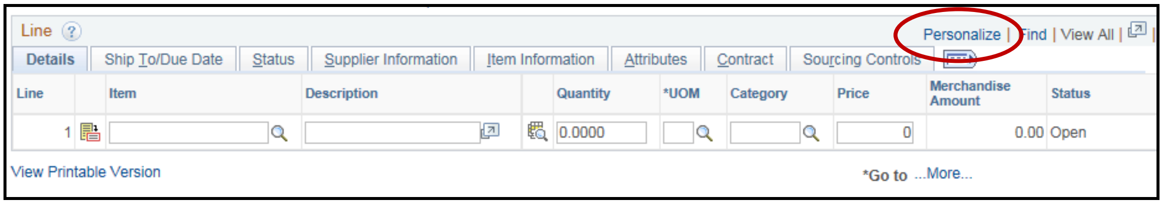



## 10.3 Temporarily Adjusting Sort Order

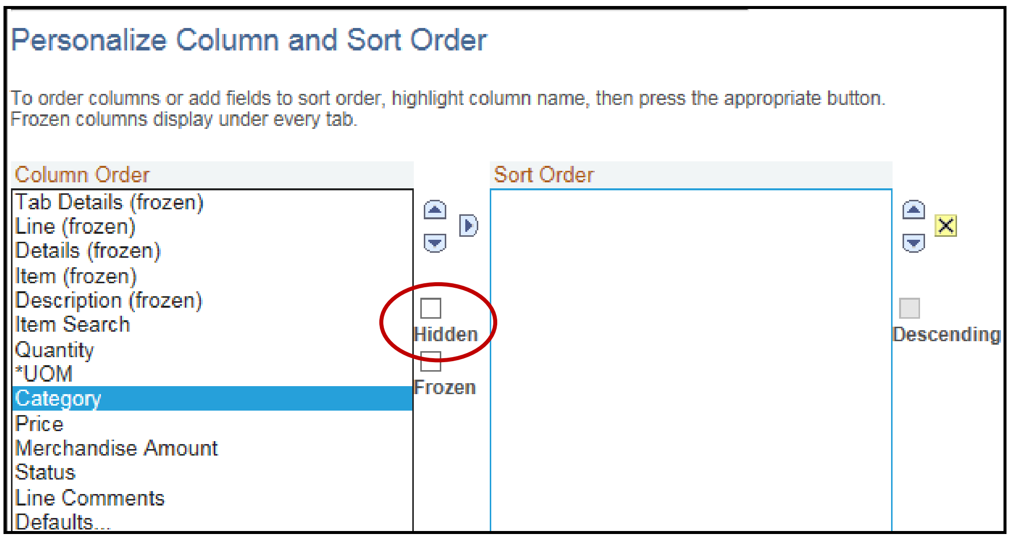
Perform a one-time sort of information by clicking on a column heading (e.g., Price) by which you wish to sort. An upward or downward facing arrow will appear next to the heading to indicate either ascending or descending order. Click the column heading again to switch between the two sort orders.

## 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.

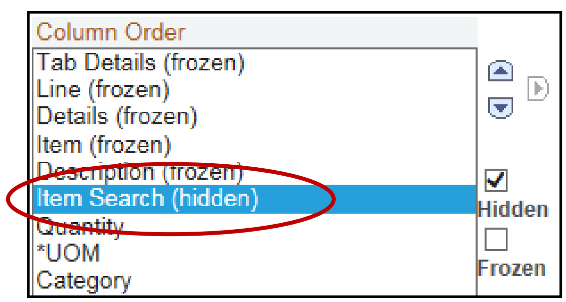



2. Select the fields you wish to hide by clicking on each field name in the left hand column. You can use Ctrl>Click or Shift>Click to make multiple selections.

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.

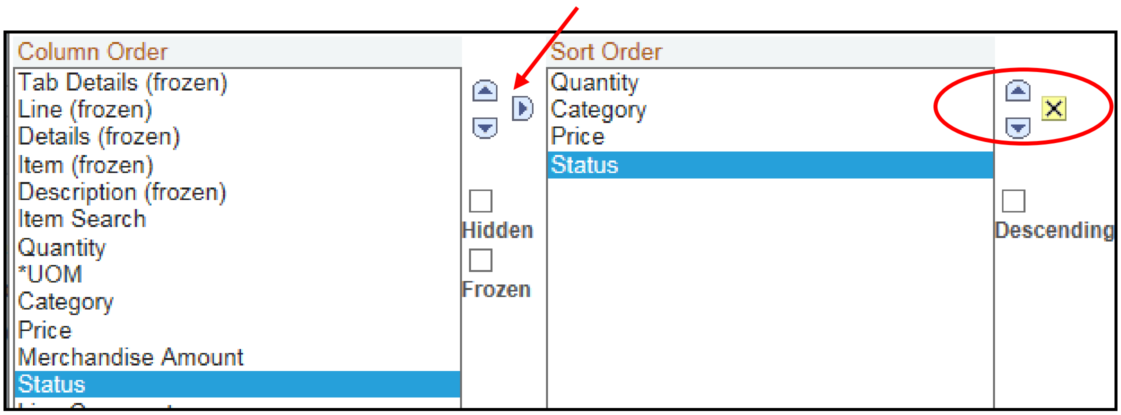
3. Click the **OK** button and the selected tabs will be hidden.

## 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.

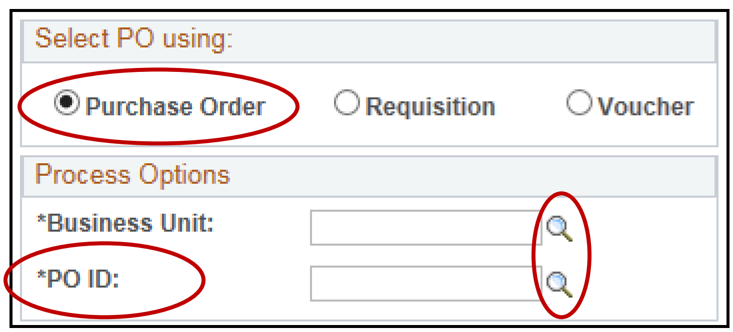
> **NOTE**: *Although these customizations will remain saved each time you log in, they are not permanent. If you find you have hidden a field that is needed, go back into the Personalization page and un-hide the desired field.*

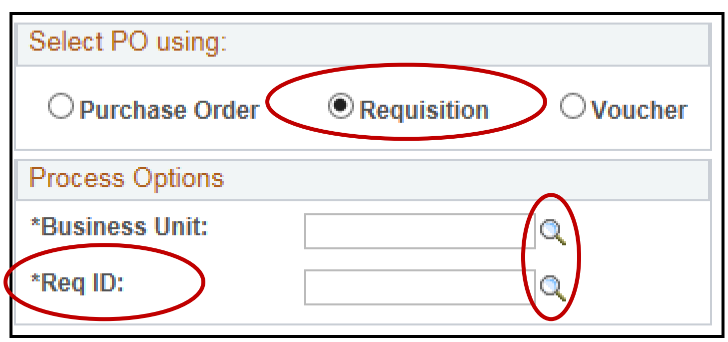
# Section 11 CSU PO Life Cycle Report

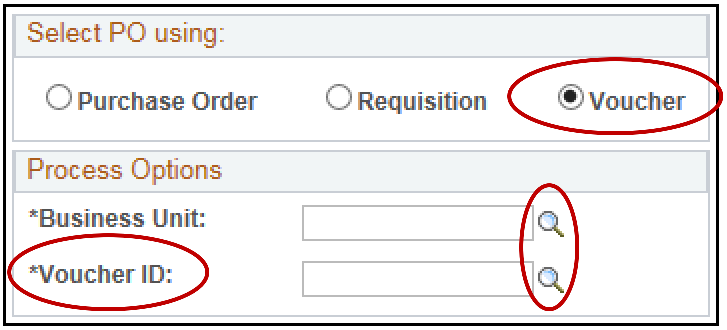
## Overview

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.)

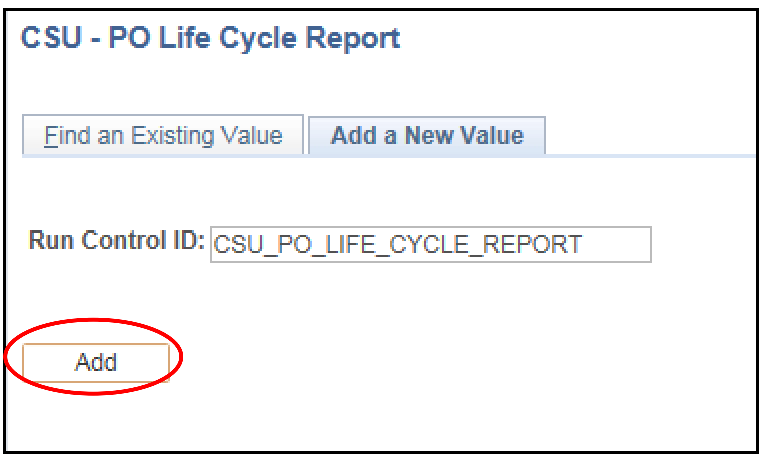


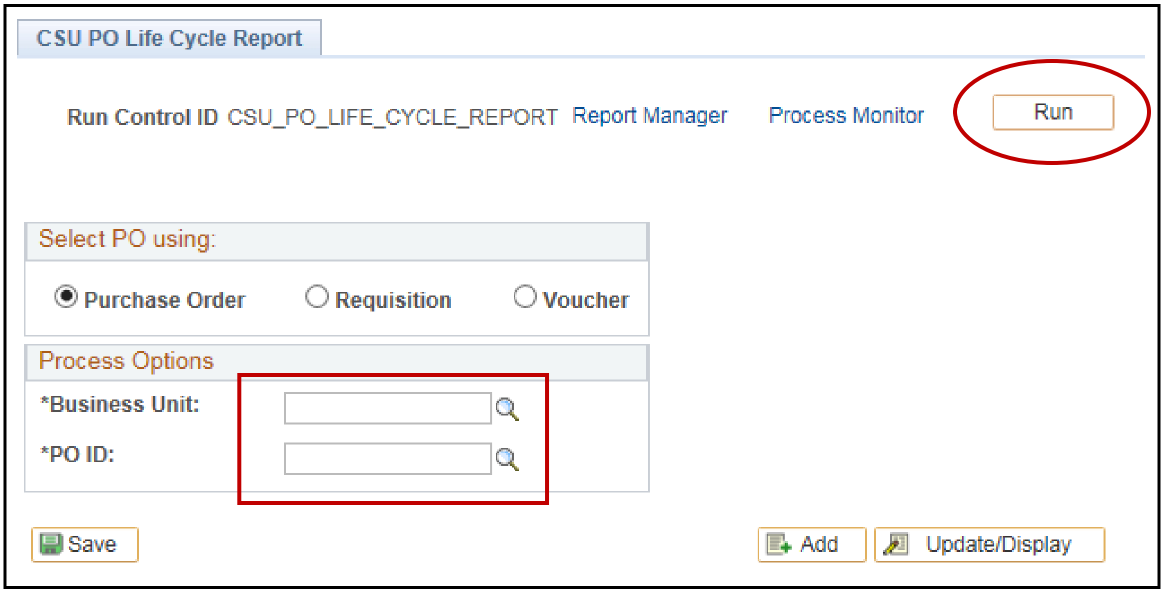






**Navigation: Purchasing > Purchase Orders > Reports > CSU PO Life Cycle Report**

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.

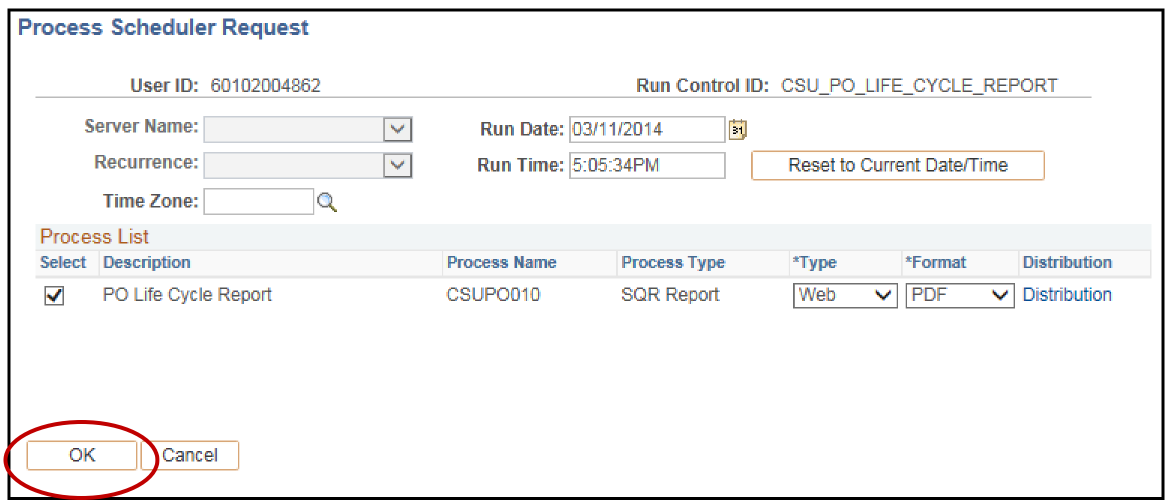




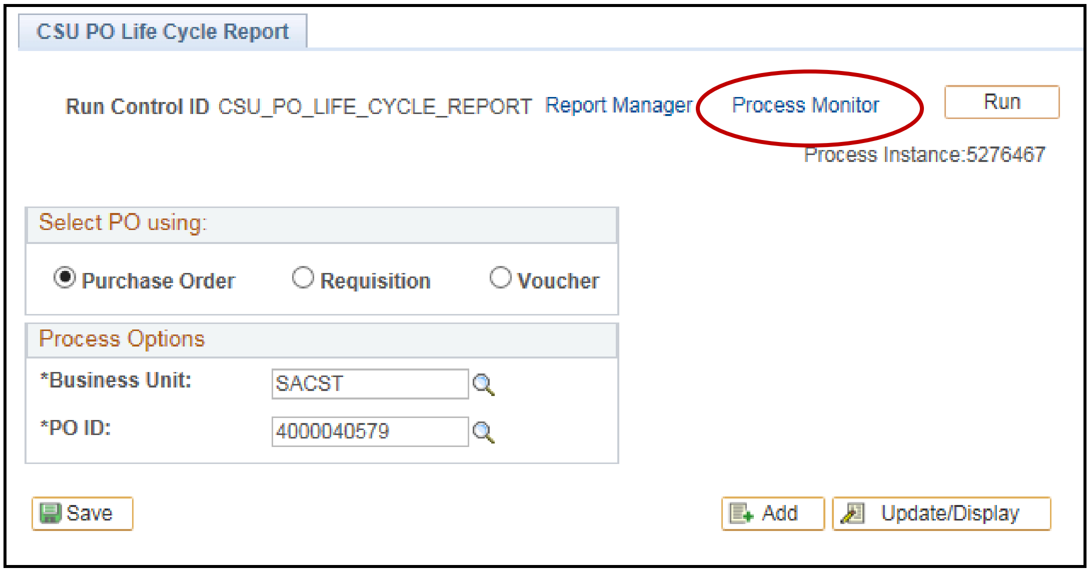

4. Enter the **Business Unit** SACST.

5. Enter the **PO** number.

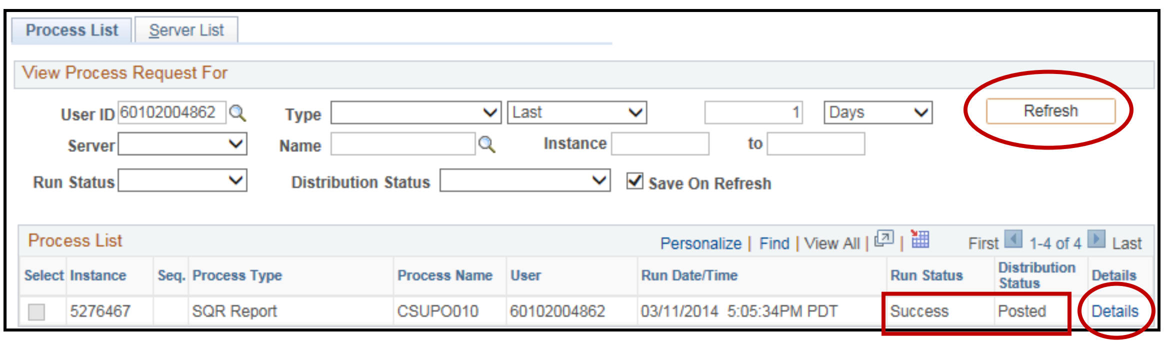
6. Click the **Run** button.




7. Click the **OK** button.

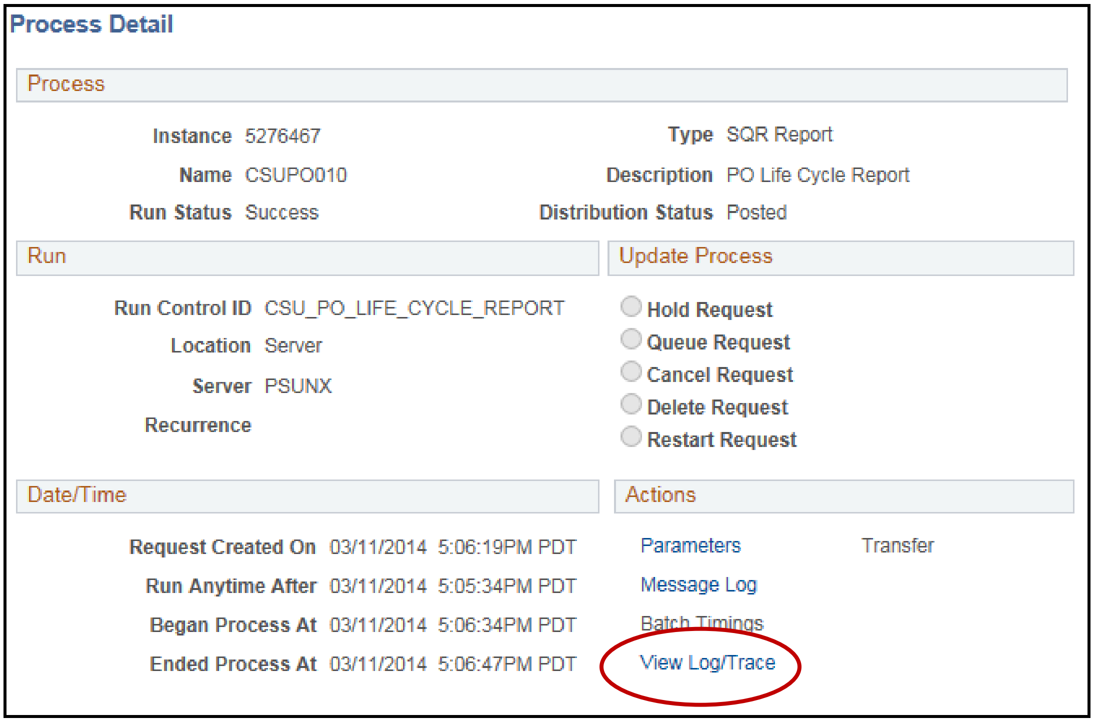



8. Click **Process Monitor** link.

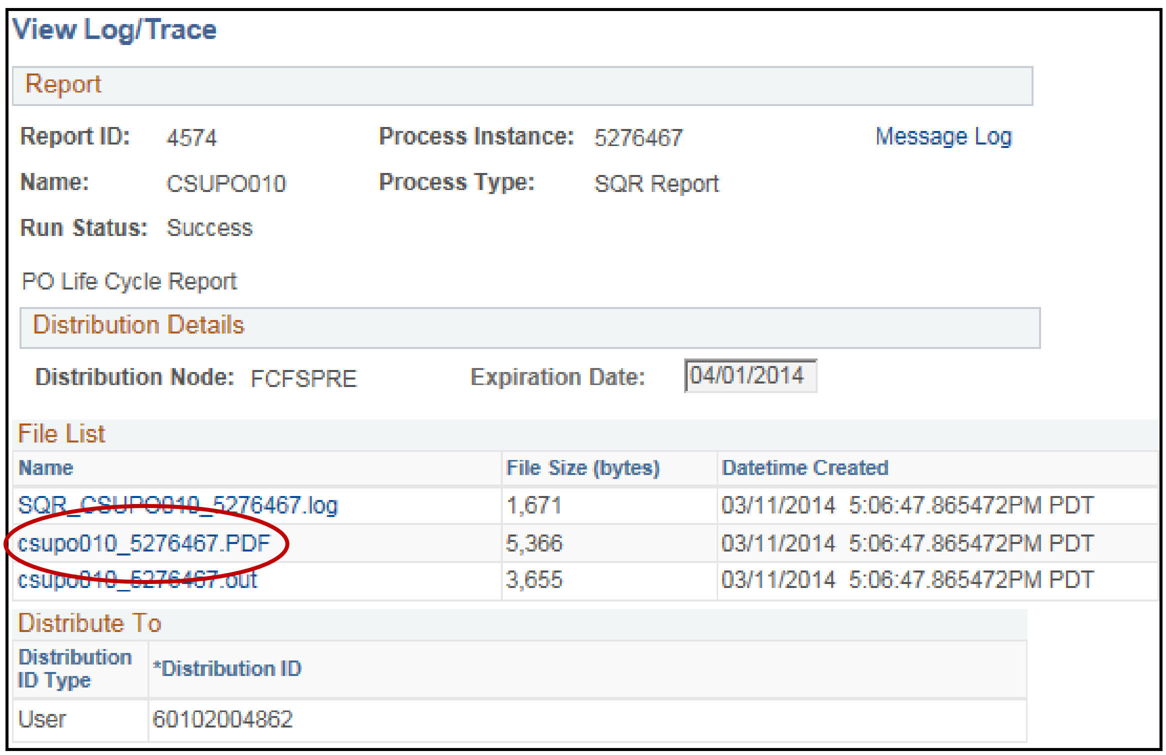



9. Click on **Refresh** until your Run/Distribution Status reads **Success/Posted**.

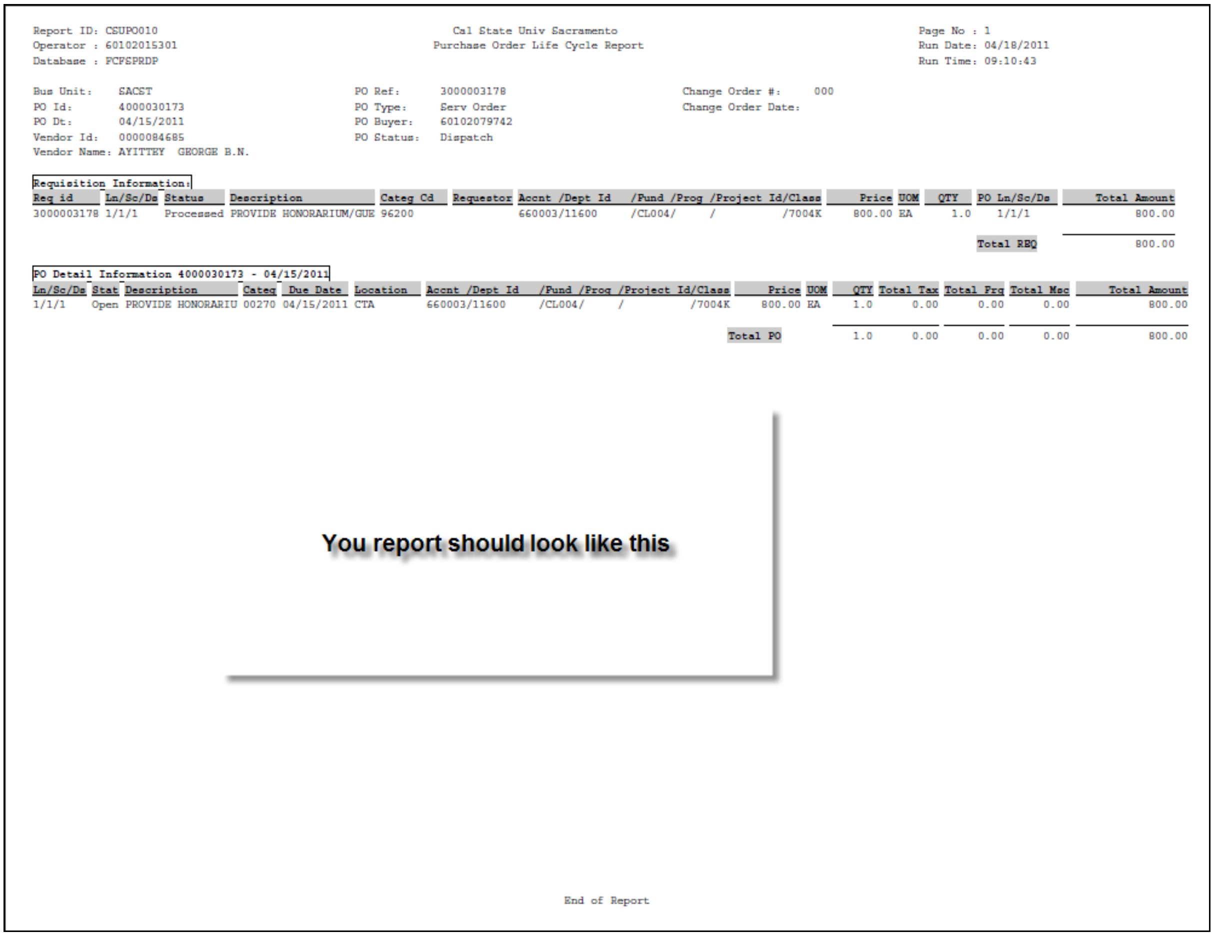
10. Click on the **Details** link.




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



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



Report ID: CSUPO010
Operator : 60102015301
Database : PCFSPRDP

Cal State Univ Sacramento
Purchase Order Life Cycle Report

Page No : 1
Run Date: 04/18/2011
Run Time: 09:10:43

Bus Unit: SACST
PO Id: 4000030173
PO Dt: 04/15/2011
Vendor Id: 0000084685
Vendor Name: AYITTEY GEORGE B.N.

PO Ref: 3000003178
PO Type: Serv Order
PO Buyer: 60102079742
PO Status: Dispatch

Change Order #: 000
Change Order Date:

Requisition Information:

| Req id | Ln/Sc/Ds | Status | Description | Categ Cd | Requestor | Accnt /Dept Id | /Fund /Prog /Project Id/Class | Price | UOM | QTY | PO Ln/Sc/Ds | Total Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 3000003178 | 1/1/1 | Processed | PROVIDE HONORARIUM/GUE | 96200 | | 660003/11600 | /CL004/ / /7004K | 800.00 | EA | 1.0 | 1/1/1 | 800.00 |
| | | | | | | | | | | | Total REQ | 800.00 |

PO Detail Information 4000030173 - 04/15/2011

| Ln/Sc/Ds | Stat | Description | Categ | Due Date | Location | Accnt /Dept Id | /Fund /Prog /Project Id/Class | Price | UOM | QTY | Total Tax | Total Frg | Total Msc | Total Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1/1/1 | Open | PROVIDE HONORARIU | 00270 | 04/15/2011 | CTA | 660003/11600 | /CL004/ / /7004K | 800.00 | EA | 1.0 | 0.00 | 0.00 | 0.00 | 800.00 |
| | | | | | | | Total PO | | | 1.0 | 0.00 | 0.00 | 0.00 | 800.00 |



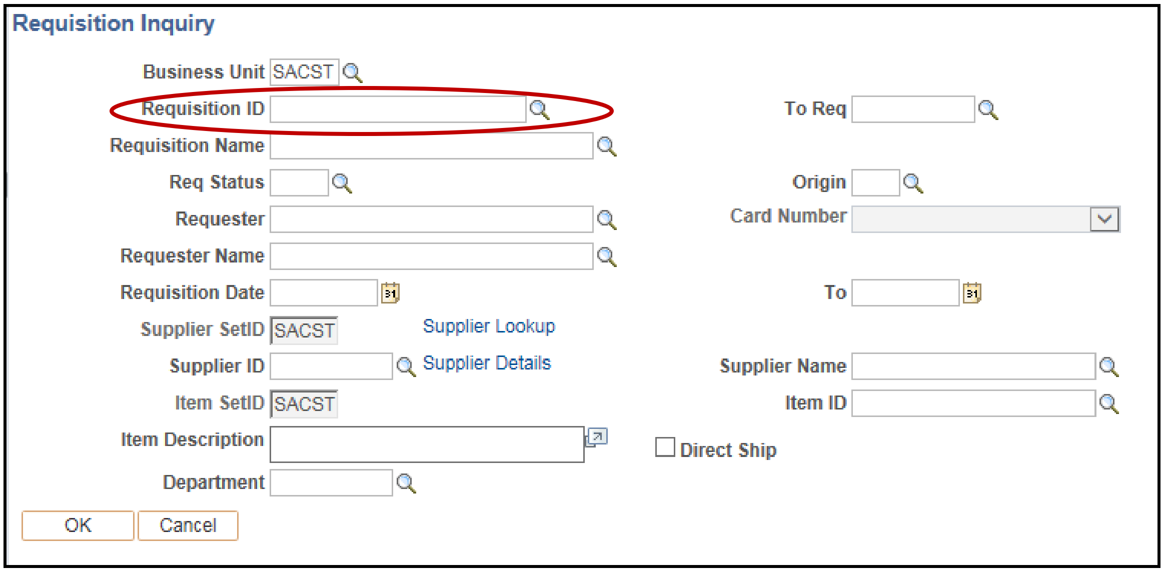
End of Report

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

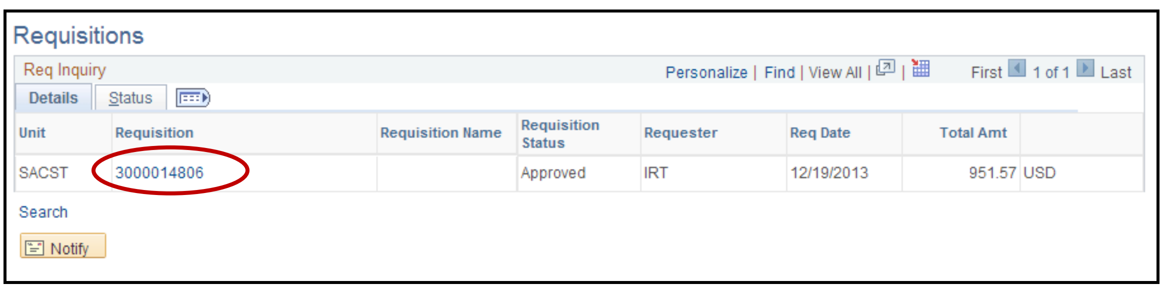
# Section 12 How to identify the Buyer for your requisition:

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

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




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




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 I~~ |
| 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 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.