

# CFS REQUISITION PROCESS GUIDE

# CFS Requisition Process Guide

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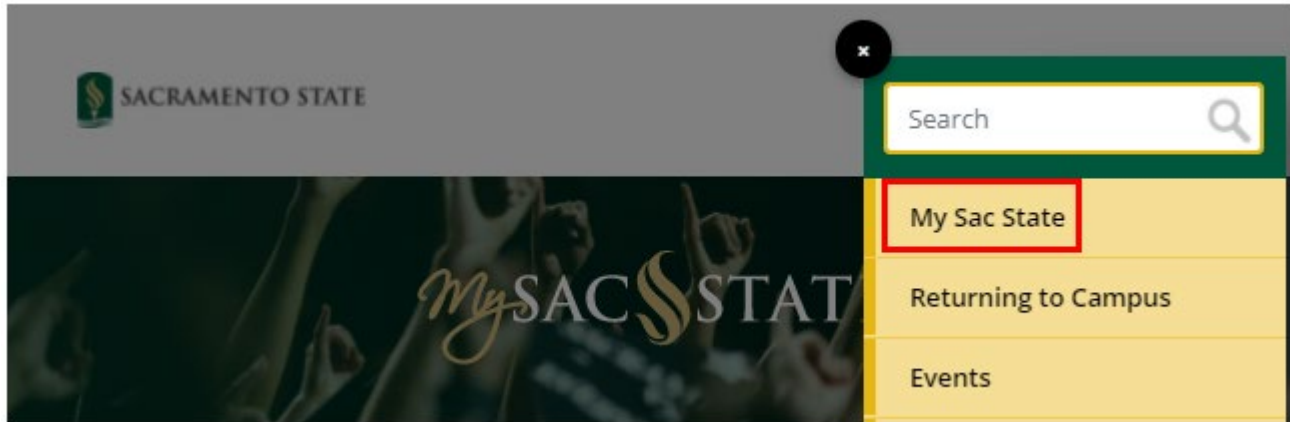
# CFS Requisition Process Guide

## Section 1.0 Creating a Purchase Requisition

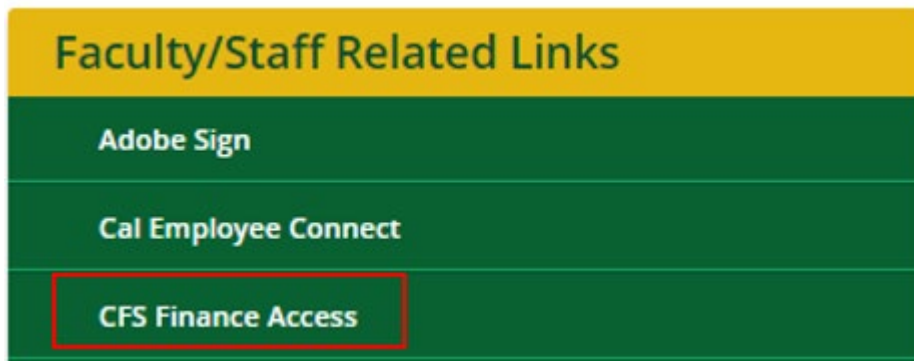
When creating a requisition with multiple lines using the same Chartstring information, it is best to enter Requisitions using the requisition defaults. Setting the defaults before entering each line will save time and reduce errors.

1. Log in to CFS from My Sac State with your SacLink user name and password

<https://www.my.csus.edu>



2. From the Faculty/Staff Related Links page click on the CFS Finance Access link.




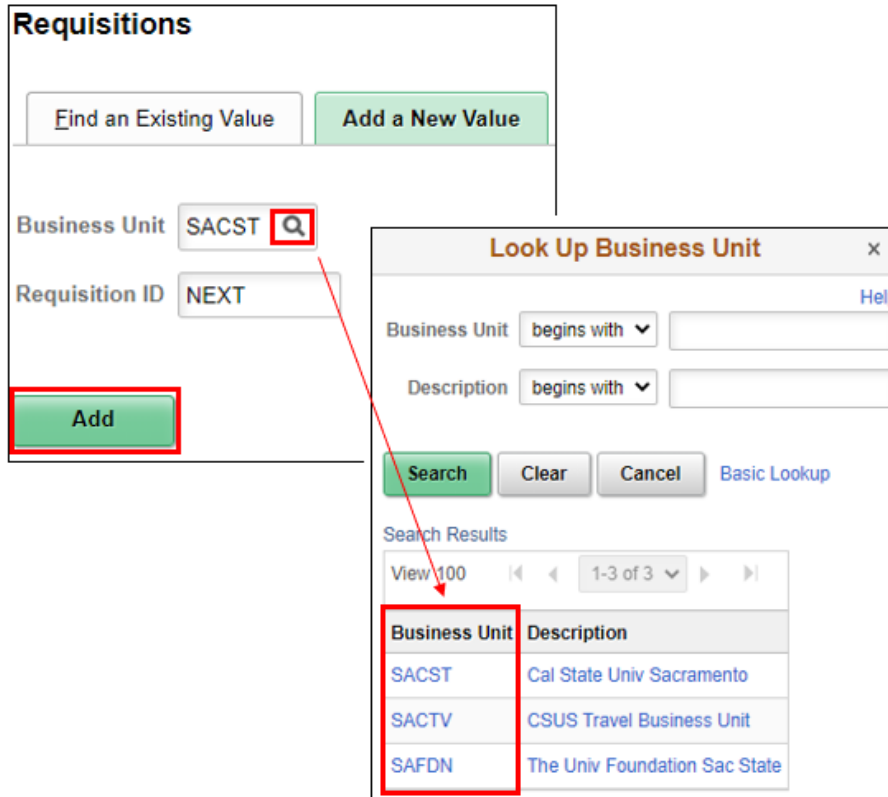
3. The Oracle menu page will display. Click on the diamond-shaped NavBar icon at the top right of the homepage.
4. Follow the following path. Navigator>Purchasing>Requisitions>Add/Update Requisitions



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

If you are using a different Business Unit click on the  to see the other options



**Requisitions**

Find an Existing Value Add a New Value

Business Unit SACST 

Requisition ID NEXT

Add

**Look Up Business Unit**

Business Unit begins with Description begins with

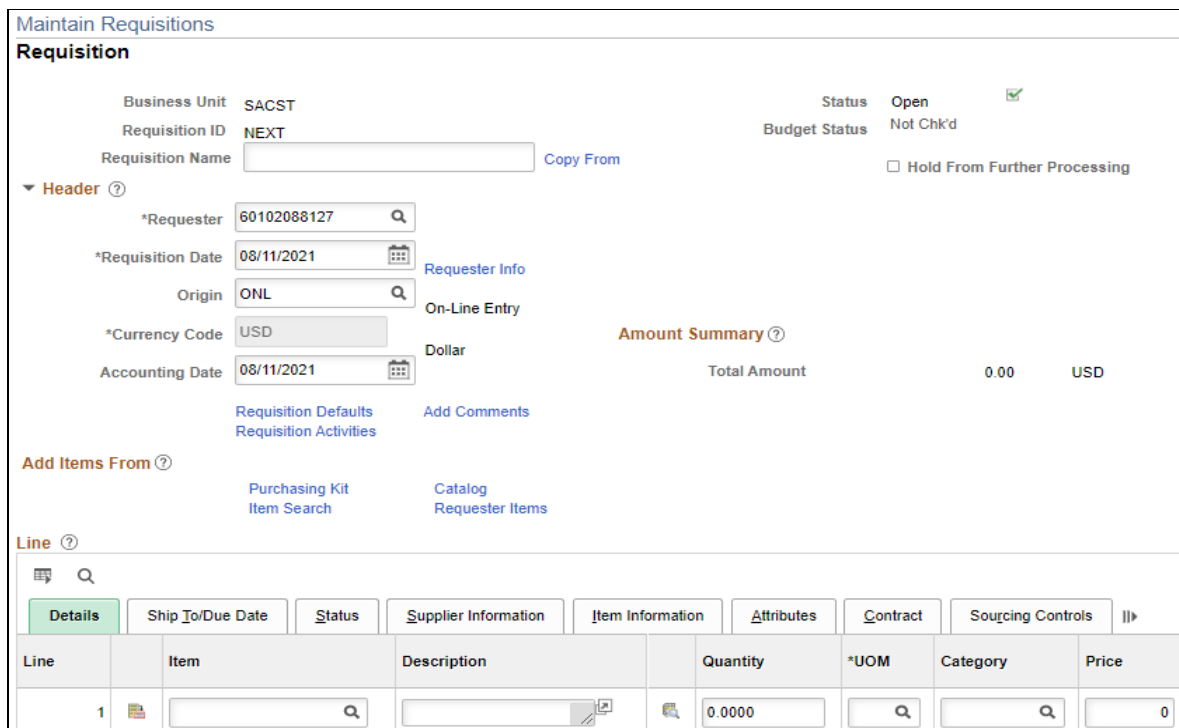
Search Clear Cancel Basic Lookup

Search Results

View 100 1-3 of 3

Business Unit	Description
SACST	Cal State Univ Sacramento
SACTV	CSUS Travel Business Unit
SAFDN	The Univ Foundation Sac State

The Requisition Header information will be automatically populated.



**Maintain Requisitions**

**Requisition**

Business Unit SACST Status Open ☒

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name  Copy From ☐ Hold From Further Processing

**Header**

\*Requester 60102088127

\*Requisition Date 08/11/2021

Origin ONL

\*Currency Code USD

Accounting Date 08/11/2021

Requester Info On-Line Entry

Amount Summary

Total Amount 0.00 USD

Requisition Defaults Requisition Activities Add Comments

Add Items From

Purchasing Kit Item Search Catalog Requester Items

**Line**

Line	Item	Description	Quantity	*UOM	Category	Price
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0

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View the table below to see definitions for each field and whether entry is required or optional.

Field Definitions below:

Field	What do I need to enter?
Business Unit	The default Business Unit is SACST
Requisition ID	The Requisition ID number automatically assigned when the requisition is saved.
Requisition Name	Entry recommended but not required. You may enter a name for your requisition to help you identify it later. If you do not enter a Requisition Name, the system will set the Requisition ID as the Requisition Name once you save the requisition.
Status	No entry required. The status defaults to <b>Open</b> .
Budget Status	No entry required. The status defaults to <b>Not Chk'd</b>
Requester	No entry required. Defaults to the CFS ID/Name of the person creating the requisition. If it does not, click on the search icon to select your Requester from the list
Requisition Date	No entry required. Defaults to the date the requisition was created and saved.
Origin	No entry required. Origin defaults to <b>ONL</b>
Currency Code	No entry required. Currency Code defaults to <b>USD</b> (US Dollar).
Accounting Date	No entry required. Accounting Date defaults to the date the requisition was created and saved.

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- Click **Requisition Defaults** to view or modify the settings

▼ Header ?

\*Requester [Search]  
\*Requisition Date 08/11/2021 [Calendar] Requester Info  
Origin ONL [Search] On-Line Entry  
\*Currency Code USD Dollar  
Accounting Date 08/11/2021 [Calendar]  
**Requisition Defaults** Add Comments  
Requisition Activities

- Review the Requisition Defaults and make modifications as needed

**Requisition Defaults**

Business Unit SACST Requisition Date 08/11/2021  
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 [Search] Unit of Measure [Search]  
Supplier [Search] Supplier Location [Search]  
Category [Search] Supplier Lookup

**Schedule**

Ship To [Search] \*Distribute By Quantity  
Due Date [Calendar] \*Liquidate By Amount  
Ultimate Use Code [Search] Ship Via [Search]  
Attention To [Text] Freight Terms [Search]

**Distribution**

SpeedChart [Text]

**Distributions**

Details Asset Information ||>

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class
1	[Search]	SACST [Search]	[Search]	[Search]	[Search]	[Search]	[Search]	[Search]

OK Cancel Refresh

# CFS Requisition Process Guide

View the list below to find out more about each field and what to fill out.

Field Definitions Below:

Field	Description
Default Options	<p><b>Default:</b> Select this option to use the values that default from the system. You may still fill in any blank field.</p> <p><b>Override:</b> Select this option to use the values you specify on this page to override the system defined defaults. You may change any value that defaults on this page by using this option.</p> <p><b>Note:</b> Leave as Default if you will be using different chartstrings for each line item; if using one chartstring for all line items, make sure to click on the Override button and input the chartstring in the Distributions section</p>
Supplier	<p>The <b>supplier</b> that you want to use for this purchase requisition. If the supplier exists, use the magnifying glass icon to locate and select the supplier from the list.</p> <p>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.</p>
Unit of Measure	Enter the <b>unit of measure</b> : either EA (each) for item orders or DLR for services and blanket orders.
Ship To	The <b>Ship To</b> address where the requisition items are to be sent defaults from the Requester. To change the delivery address, use the magnifying glass icon to locate and select the appropriate value. If the value you want does not appear, you may use the Header Comments to indicate the delivery address.
Distribute By	<b>Distribute By</b> will default to <b>Quantity</b> . Leave as is if the requisition is for a commodity. Change it to <b>Amount</b> if the requisition is for a service.
Distributions	<p>Default Distribution Chartfield values are defined for each Requester and are displayed here. They may be changed as necessary to reflect where the charges for the requisition should be billed.</p> <p><b>Required</b> fields include Account, Fund, and Dept.  <b>Optional</b> fields include Program, Class, and Project.</p> <p><b>If you are using a different Business Unit click on the look up icon to see the other options</b></p>

**Note:** You are unable to add additional chartfields on a single distribution line.

# CFS Requisition Process Guide

8. Click **OK** when you have made all of the modifications that you wish to appear on all lines of your requisition.

**Distribution**

SpeedChart

**Distributions**

Dist	Percent	GL Unit	Account
1	<input type="text"/>	SACST <input type="text"/>	660003

## Section 1.1 Requisition Line Details

1. The line section of the screen will default to the **details** tab. Complete each requisition line (including line Description, Quantity, UOM, Category and Price)  
As long as the requisition status remains open, you can make changes to any field you have entered.

**Line**

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Dell OptiPlex 7090 Ultra Desktop Item: 1815369	3.0000	EA <input type="text"/>	91900 <input type="text"/>	938.00000	2,814.00	Open

2. You can add additional lines to the requisition using the same default chartstring information.
3. To add a line to the requisition, click the add a row icon at the end of the first line item
4. When prompted enter the number of rows you wish to add then click the **OK** button




# CFS Requisition Process Guide

All blank rows must be populated. It's recommended that you add just one row at a time, fill out the line item information, click Save, and then add another row.

This way, if you are interrupted while filling out the requisition, you will only lose the one-line item row you were working on if you are timed out after 20 minutes of inactivity.

## Field Definitions below:

Field	Description
Description	Enter the <b>description</b> 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 <b>quantity</b> of the product. If it is a service, enter "1"
UOM	Enter the <b>Unit of Measure</b> . Select EA for all commodities (57800) or DLR (96200) for all services. EA/DLR (91900) Accessible Technology Initiative
Category	Enter <b>57800</b> for miscellaneous commodities or <b>96200</b> for miscellaneous services or <b>91900</b> Accessible Technology Initiative
Price ( <b>No zero-dollar entries</b> )	Enter the <b>Price</b>

## Section 1.2 Modify the chartfield for the Line Item

For each line item, you will need to view the Distribution screen to verify or modify the chartfields that will be charged for the line item.

**Note:** that if you selected "Override" in the Requisition Defaults section and inputted a chartstring in the Distributions section, this will supersede any information inputted for individual line items.

# CFS Requisition Process Guide

1. Click on the **Schedule** icon at the far right of the Requisition Line.

**Requisition**

Business Unit: SACST  
 Requisition ID: NEXT  
 Requisition Name:  Copy From

Status: Open ☒  
 Budget Status: Not Chk'd  
☐ Hold From Further Processing

**Header**

\*Requester: 60101020474 Massey, Karen D  
 \*Requisition Date: 08/12/2021  
 Origin: ONL On-Line Entry  
 \*Currency Code: USD Dollar  
 Accounting Date: 08/12/2021

**Amount Summary**

Total Amount: 2,814.00 USD

**Add Items From**

Purchasing Kit Item Search Catalog Requirer Items

**Line**

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Dell OptiPlex 7090 Ultra Desktop Item: 1815369	3.0000	EA	91900	938.00000	2,814.00	Open

2. Click on the **Distribution** icon next to the left of the Status column

**Schedule**

Business Unit: SACST Requisition Date: 08/12/2021  
 Requisition ID: NEXT Status: Open  
[Return to Main Page](#)

**Line**

Line	Item	Quantity	Each	Merchandise Amt
1	Dell OptiPlex 7090 Ultra Desk	3.0000	Each	

**Schedule**

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CENT R Q	3.0000	938.00000	2,814.00		Massey, Karen C	Active

3. Verify that the chartfields on this screen are correct for this purchase and modify the fields as needed.

**Note:** that you may see additional fields other than the ones in the screenshot below. Only the fields shown in the screenshot below are used

**Distribution**

Requisition ID: NEXT Item: Dell OptiPlex 7090 Ultra Desk  
 Line: 1 Status: Active  
 Schedule: 1

Ship To: CENT REC Quantity: 3.0000 EA  
 \*Distribute By: Quantity Open Quantity: 3.0000  
 \*Liquidate By: Amount Merchandise Amt: 2,814.00 USD  
 SpeedChart:  Multi-SpeedCharts

**Distributions**

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Product	Project
1	Open	100.0000	3.0000	2,814.00	SACST Q	660003	MDS01	49100				

OK Cancel Refresh

# CFS Requisition Process Guide

## Rules for CFS:

- Must be a valid Account, Fund, Dept, Program, Class, or Project code
- Fund/Dept combination (not all fund codes are available for each department)
- Account/Fund combination (some fund codes restrict which account codes can be used with them)
- Cannot use multiple chartstrings on a single distribution line

4. Once you have verified that the information on the Distribution screen is correct, click **OK**

**Distribution**

Requisition ID: NEXT      Item: Dell OptiPlex 7090 Ultra Desk  
 Line: 1      Status: Active  
 Schedule: 1

Ship To: CENT REC      Cent Rec      Quantity: 3.0000 EA  
 \*Distribute By: Quantity      Open Quantity: 3.0000  
 \*Liquidate By: Amount      Merchandise Amt: 2,814.00 USD  
 SpeedChart:  Multi-SpeedCharts

**Distributions**

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Product	Project
1	Open	100.0000	3.0000	2,814.00	SACST	660003	MDS01	49100				

5. Click Return to Main Page to go back to the main Requisition Entry screen

**Schedule**

Business Unit: SACST      Requisition Date: 08/12/2021  
 Requisition ID: NEXT      Status: Open  
[Return to Main Page](#)

Line: 1      Item: Dell OptiPlex 7090 Ultra Desk      Quantity: 3.0000 Each      Merchandise Amt: 2,814.00 USD

**Schedule**

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CENT R	3.0000	938.00000	2,814.00		Massey, Karen C	Active

# CFS Requisition Process Guide

## Section 1.3 Add Comments to a Requisition

Add Comments section is used to provide additional information to the Buyer or the Supplier. This is also where you will enter the vendor information if you are unable to find their Supplier ID.

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

The screenshot shows the 'Maintain Requisitions' interface. At the top, it says 'Requisition'. Below this, there are fields for 'Business Unit' (SACST), 'Requisition ID' (NEXT), and 'Requisition Name' (with a 'Copy From' link). To the right, there are status indicators: 'Status' (Open with a green checkmark), 'Budget Status' (Not Chk'd), and a checkbox for 'Hold From Further Processing'. Below these are fields for '\*Requester' (60101020474, linked to Massey, Karen D), '\*Requisition Date' (08/12/2021), 'Origin' (ONL, linked to On-Line Entry), '\*Currency Code' (USD, linked to Dollar), and 'Accounting Date' (08/12/2021). An 'Amount Summary' section shows 'Total Amount' as 2,814.00 USD. At the bottom, there are links for 'Requisition Defaults', 'Requisition Activities', and 'Add Comments' (which is highlighted with a red box).

2. Enter the information that you would like to add

The screenshot shows the 'Comments' dialog box. It has a search bar and navigation controls at the top. Below, there's a section for 'Use Standard Comments' with a 'Comment Status' dropdown set to 'Active' and an 'Inactivate' button. The main text area contains the comment: 'DEPARTMENT CONTACT IS JANE DOE IN UNDERGRADUATE STUDIES IN EDUCATION, ALPINE HALL 119. 916-278-5555 OR DIANE.DOE@CSUS.EDU. QUOTE ATTACHED ICT APPROVAL ATTACHED'. Below the text area are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', all of which are checked. There's an 'Associated Document' section with an 'Attachment' field and buttons for 'Attach', 'View', 'Delete', and an 'Email' checkbox. At the bottom, it says 'From -> REQ SACST-NEXT' and has 'OK', 'Cancel', and 'Refresh' buttons.


3. Check the **Send to Supplier**, **Show at Receipt** and **Shown at Voucher** boxes. This will ensure the comments are printed on the requisition. If you do not select these options your comment will not be seen.

### Types of information commonly provided include:

- Special Instructions (i.e. Rush Order Information)
- Vendor contact, if applicable; Name and email address to send the PO to for processing.

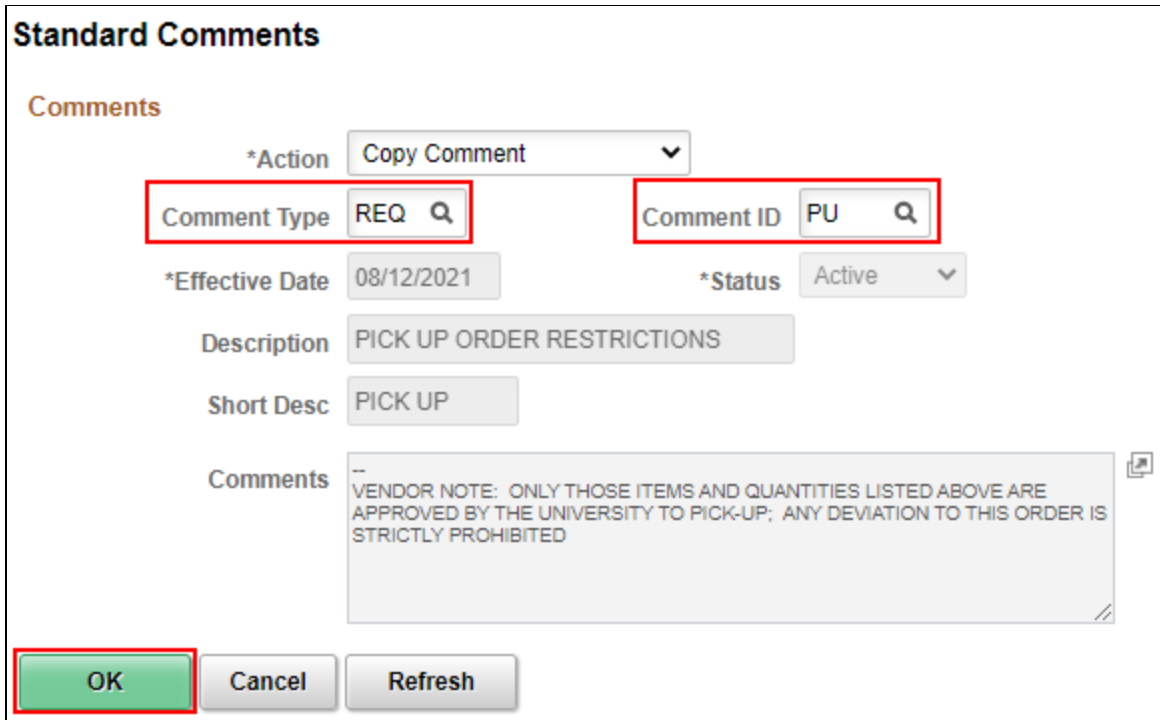
# CFS Requisition Process Guide

- Name, contact phone number, and email address for person(s) requesting this purchase (if other than Requester)
  - New Supplier
  - Existing Supplier Information (if cannot locate supplier ID
  - Specific location for the delivery of items in the order
  - ICT Authorization Number for IT-related purchases
  - Provide Procurement with additional required information
4. To enter a comment using the pre-defined comments section, click the **Use Standard Comments** link
  5. From the standard comments window, enter REQ in the **Comment Type** field.
  6. In the **Comment ID** field, click the search icon and select from the search results list.
  7. The standard comment will populate in the Comments textbox.
  8. Click the **OK** button to continue.



Comments

[Use Standard Comments](#)



**Standard Comments**

Comments

\*Action Copy Comment ▼

Comment Type REQ 🔍

Comment ID PU 🔍

\*Effective Date 08/12/2021

\*Status Active ▼

Description PICK UP ORDER RESTRICTIONS

Short Desc PICK UP

Comments  
--  
VENDOR NOTE: ONLY THOSE ITEMS AND QUANTITIES LISTED ABOVE ARE APPROVED BY THE UNIVERSITY TO PICK-UP; ANY DEVIATION TO THIS ORDER IS STRICTLY PROHIBITED

OK Cancel Refresh

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



[Requisition Defaults](#)

[Edit Comments](#)

[Requisition Activities](#)

# CFS Requisition Process Guide

## Section 1.4 Adding Attachments to your Requisition

Add Comments section is used to provide additional information to the Buyer or the Supplier.

1. To **Add** an attachment, click on the Add Comments link on the Requisition screen.

Maintain Requisitions

Requisition

Business Unit

SACST

Requisition ID

NEXT

Requisition Name

Copy From

Status

Open

Budget Status

Not Chk'd

Hold From Further Processing

☐

▼ Header ?

\*Requester

60101020474

Massey, Karen D

\*Requisition Date

08/12/2021

Requester Info

Origin

ONL

On-Line Entry

\*Currency Code

USD

Dollar

Accounting Date

08/12/2021

Amount Summary ?

Total Amount

2,814.00

USD

Requisition Defaults

Requisition Activities

Add Comments

2. Click **“Attach”** to upload your document(s)

# CFS Requisition Process Guide

Header Comments

Business UnitSACST

Requisition IDNEXT

Requisition Date08/12/2021

StatusOpen

\*Sort MethodComment Time Stamp

\*Sort SequenceAscending

Sort

Comments

Use Standard Comments

Comment StatusActive

Inactivate

☒ Send to Supplier

☒ Show at Receipt

☒ Show at Voucher

Associated Document

Attachment

Attach

View

Delete

Email

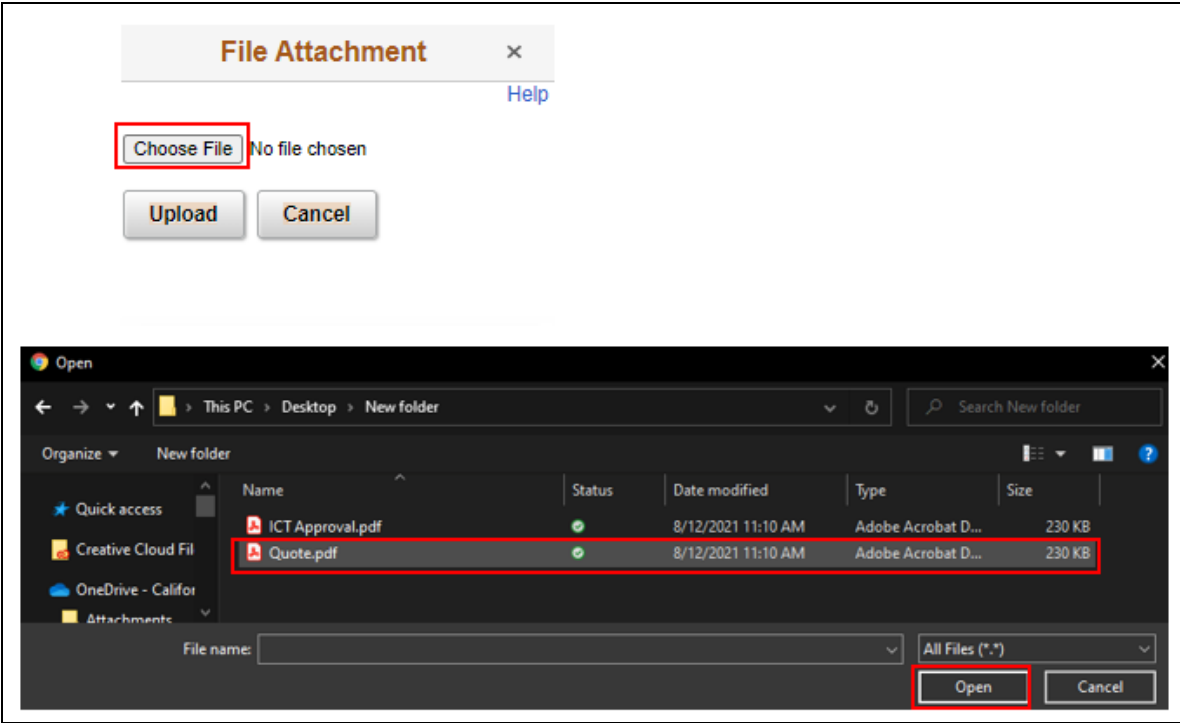
From -> REQ SACST-NEXT

OK

Cancel

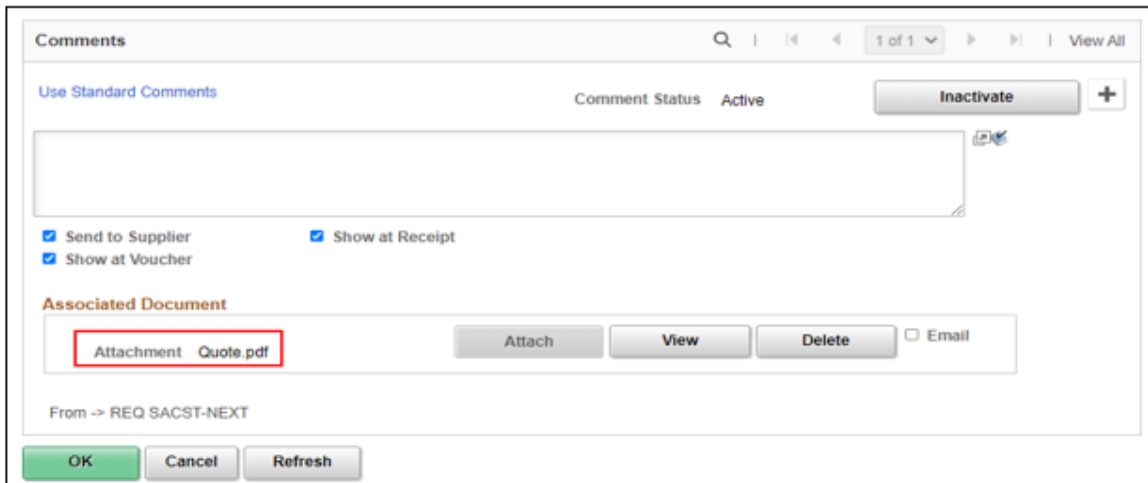
Refresh

- 3. Choose File
- 4. Locate the file that you want to attach on your computer. Click on it to select it and then click Open



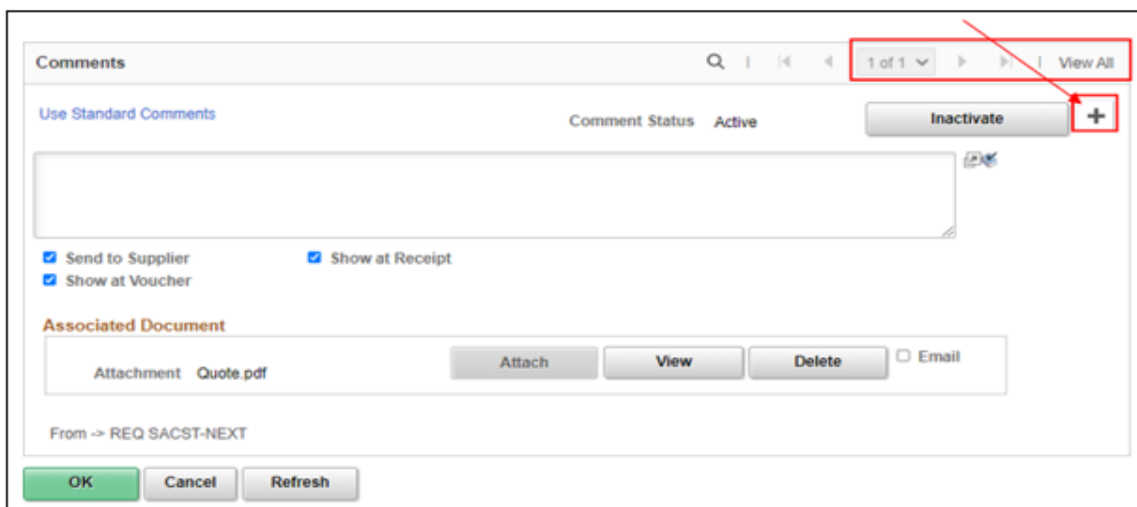
# CFS Requisition Process Guide

- Once your file uploads you will see the Associated Document appear next to the attachment tab. You can click View to view your attachment or Delete to remove it.



The screenshot shows a 'Comments' form. At the top, there's a search bar and navigation links. Below that, a 'Use Standard Comments' link and a 'Comment Status' dropdown set to 'Active'. An 'Inactivate' button with a '+' icon is on the right. A large text area for comments is below. Checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher' are present. The 'Associated Document' section has a red box around the text 'Attachment Quote.pdf'. To its right are 'Attach', 'View', and 'Delete' buttons, and an 'Email' checkbox. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons.

- Only one file is allowed per comment page; you will need to click on the + button to add a new row icon in order to attach multiple files.

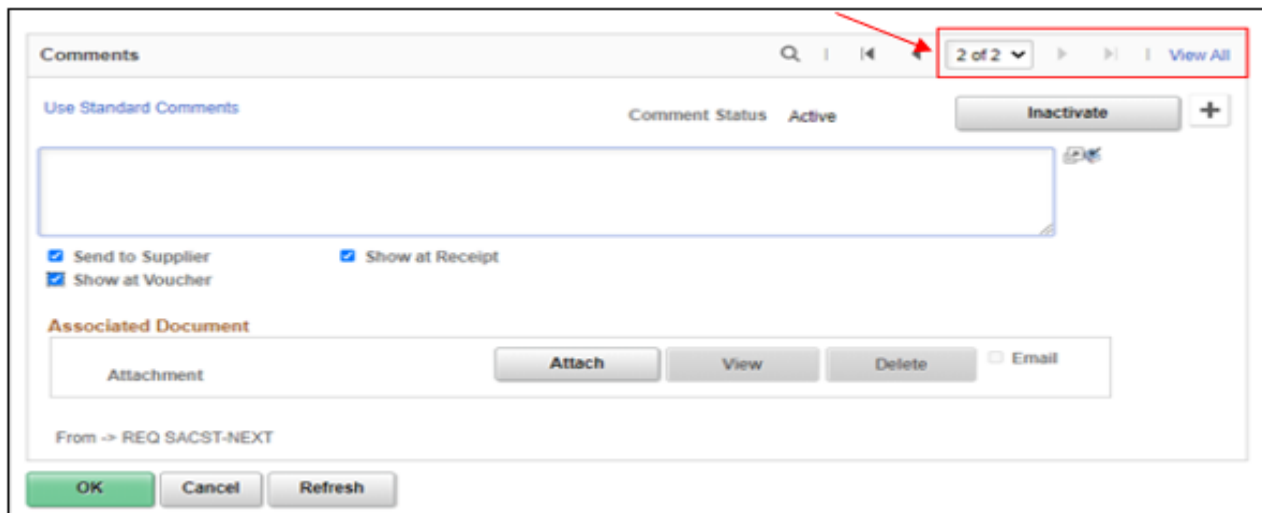


This screenshot is similar to the previous one but highlights the '+1 of 1' dropdown in the top right corner with a red box. A red arrow points from this box to a '+' button located next to the 'Inactivate' button. The rest of the form, including the 'Associated Document' section with 'Attachment Quote.pdf', remains the same.

- You will now see that there is an additional section to add your document (**2 of 2**)
- Repeat steps 2 through 4 above
- Click **OK** to return to the main page of the requisition



# CFS Requisition Process Guide



The screenshot displays the 'Comments' section of a CFS Requisition Process Guide. At the top, there is a search bar and a navigation bar. The navigation bar includes a '2 of 2' dropdown menu, which is highlighted by a red box and a red arrow. Below the navigation bar, there is a section for 'Use Standard Comments' with a 'Comment Status' dropdown set to 'Active' and an 'Inactivate' button. A large text area for comments is present. Below the text area, there are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section includes an 'Attachment' field, 'Attach', 'View', and 'Delete' buttons, and an 'Email' checkbox. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons. The text 'From -> REQ SACST-NEXT' is visible above the bottom buttons.

10. Click **Save** at the bottom left of the screen to save your requisition.

# CFS Requisition Process Guide

**Requisition**

Business Unit SACST Status Open ☒  
 Requisition ID NEXT Budget Status Not Chkd  
 Requisition Name  Copy From ☐ Hold From Further Processing

▼ Header ?

\*Requester 60101020474 Massey, Karen D  
 \*Requisition Date 08/12/2021 Requester Info  
 Origin ONL On-Line Entry  
 \*Currency Code USD Dollar  
 Accounting Date 08/12/2021

Amount Summary ?  
 Total Amount 2,814.00 USD

Requisition Defaults Add Comments  
 Requisition Activities

Add Items From ?  
 Purchasing Kit Catalog  
 Item Search Requester Items

Line ?

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount
1	Dell OptiPlex 7090	3.0000	EA	91900	938.00000	2,814.00

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

Save Notify Refresh

11. A Requisition ID has been assigned and the requisition is saved
12. You may now Approve the Requisition by clicking on the green checkmark referenced by the **Status** field.

**Requisition**

Business Unit SACST Status Open ☒  
 Requisition ID 3000042258 Budget Status Not Chkd  
 Requisition Name 3000042258 ☐ Hold From Further Processing

Your Requisition Status is now approved.

**Requisition**

Business Unit SACST Status Approved ☒  
 Requisition ID 3000042258 Budget Status Not Chkd  
 Requisition Name 3000042258 ☐ Hold From Further Processing

Funds are pre-encumbered once the requisition is approved and budget checked in the system. The budget check process is completed through a nightly process that IRT completes.

Once the requisition has been budget checked, Procurement & Contract Services will convert the requisition into a purchase order. Please allow 5-7 business days for Procurement to process your requisition.

# CFS Requisition Process Guide

## Section 1.5 Printing a Copy of the Requisition

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.

1. Follow the following path. Navigator>Purchasing>Requisitions>Reports>Print Requisition
2. From the Requisition Print window, click on the Add a New Value tab
3. In the **Run Control ID** field enter req print and click the **ADD** button.
4. 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

**Requisition Print**

Find an Existing Value Add a New Value

Run Control ID Req\_Print

Add

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

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

**Print Requisition**

Run Control ID Req\_Print Language English Specified Language Recipient's Language

Report Manager Process Monitor Run

**Report Request Parameters**

Business Unit SACST Requisition ID 3000042258

From Date Through Date Requester

**Statuses to Include**

Approved Canceled Completed Open Pending Select All

NOT On Hold

Save Notify Add Update/Display

The Process Scheduler Request page will display

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10. Be sure the checkbox for Requisition Print SQR is selected and the Type and Format are set to **Web** and **PDF**.
11. Click the **OK** tab

**Process Scheduler Request**

User ID 60102088127 Run Control ID Print\_Requisition

Server Name  Run Date 08/13/2021

Recurrence  Run Time 2:57:21PM

Time Zone

**Process List**

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

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

**Print Requisition**

Run Control ID Print\_Requisition Report Manager **Process Monitor**

Language English  ☐ Recipient's Language

**Process Instance: 21579104**

**Report Request Parameters**

Business Unit SACST

Requisition ID 3000041325

From Date

Through Date

Requester

**Statuses to Include**

☒ Approved ☒ Canceled ☒ Completed ☒ Open ☒ Pending

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**.

13. When it is finished processing, click the **Details** link.

**Process List** **Server List**

**View Process Request For**

User ID 60102088127  Type  Last  60 Days

Server  Name  Instance From  Instance To  Report Manager

Run Status  Distribution Status  ☒ Save On Refresh

**Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	21579104		SQR Report	PORQ010	60102088127	08/13/2021 2:57:21PM PDT	Success	Posted	<a href="#">Details</a>

# CFS Requisition Process Guide

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

**Process Detail**

**Process**

Instance	21579104	Type	SQR Report
Name	PORQ010	Description	Requisition Print SQR
Run Status	Success	Distribution Status	Posted

**Run**

Run Control ID	Print_Requisition
Location	Server
Server	PSUNX
Recurrence	

**Update Process**

☐ Hold Request

☐ Queue Request

☐ Cancel Request

☐ Delete Request

☐ Re-send Content

**Date/Time**

Request Created On	08/13/2021 2:58:04PM PDT
Run Anytime After	08/13/2021 2:57:21PM PDT
Began Process At	08/13/2021 2:58:29PM PDT
Ended Process At	08/13/2021 2:58:42PM PDT

**Actions**

[Parameters](#)

[Transfer](#)

[Message Log](#)

[Batch Timings](#)

[View Log/Trace](#)

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

**View Log/Trace**

**Report**

Report ID	12493336	Process Instance	21579104	<a href="#">Message Log</a>
Name	PORQ010	Process Type	SQR Report	
Run Status	Success			

Requisition Print SQR

**Distribution Details**


Distribution Node	FCFSRD	Expiration Date	09/27/2021
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**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">SQR_PORQ010_21579104.log</a>	1,658	08/13/2021 2:58:42.858933PM PDT
<a href="#">porq010_21579104.PDF</a>	5,129	08/13/2021 2:58:42.858933PM PDT
<a href="#">porq010_21579104.out</a>	70	08/13/2021 2:58:42.858933PM PDT

# CFS Requisition Process Guide

To print the report, click on **print icon** in your browser's toolbar or menu

1 / 1 | - 91% + | 

Requisition

Cal State Univ Sacramento

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

Business Unit:	SACST	COMPLETE
Req ID	Date	Page
3000042258	08/12/2021	1
Requester	Telephone	Entered By
Massey, Karen D		Holmberg, Kimberley

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project			Dist Amt
1-1	Dell OptiPlex 7090 Ultra Desktop Item: 1815389			91900	3.0000	EA	938.00	2,814.00	
1-1-1	660003	MDS01	49100						2,814.00
Line Total:								2,814.00	
Total Requisition Amount:								2,814.00	

# CFS Requisition Process Guide

## Section 1.6 Requisition Checklist

The purpose of this checklist is to provide guidance on fully completing requisitions.

Providing all of the information requested will allow Procurement & Contract Services to understand what is being requested.

### Services

☐ Detailed Description/ Who? What? When? Where? How?

☐ Service dates

☐ If applicable, include: Agreement/Contract (these need to be signed by the Buyer of Record), Quote, Scope of Work, IC approval, Chemical approval, ICT approval.

Must use category code: ☐ 96200 – Services

☐ 91900 – Accessible Technology Initiative

☐ Catering - Third-party on-campus catering requirements must be approved by UEI in advance of the event. UEI contact is: Steven Davis. [steven.davis@csus.edu](mailto:steven.davis@csus.edu) or 916-278-5708.

☐ Chemicals - Prior to purchase, all chemicals used on campus must first be reviewed and approved by EH&S. <https://www.csus.edu/campus-safety/environmental-health-safety/internal/documents/chemical-procurement-information.pdf>. Contact EH&S at 916-278-2020 or [chemicalprocurement@csus.edu](mailto:chemicalprocurement@csus.edu)

☐ Hospitality items - any hospitality items purchased with state funds must meet the requirements as outlined in the Hospitality. <https://www.csus.edu/administration-business-affairs/internal/accounts-payable/hospitality.html>

☐ ICT Review - Purchases of IT software and/or equipment require approval from Information Technology, as a result of Federal Law Section 508 and CSU Executive Order 926. <https://www.csus.edu/information-resources-technology/technology-procurement/submission-process-rev.html>

☐ Independent Contract - Classification & Compensation / Human Resources must review and approval/disapproval requirements for Independent Contract vs Worker Determinations requests. Includes: Special Consultant, Independent Contractor. Contact: [classandcomprequests@csus.edu](mailto:classandcomprequests@csus.edu)

☐ Printing Projects - All University printing requirements must first be reviewed by University Print & Mail Department to determine if the printing project can be performed on campus. You must receive approval from University Print & Mail prior to submitting a requisition for outside services. Contact: [universityprint@csus.edu](mailto:universityprint@csus.edu)

### Commodities

☐ Complete, detailed item Description/Specification, Quantity, Unit Cost, Amount Manufacturer, Model #, Part #

☐ Shipping costs

☐ If applicable, Include: Quote, ICT approval

Must use category codes: ☐ 57800 – Goods (Commodities)

☐ 91900 – Accessible Technology Initiative

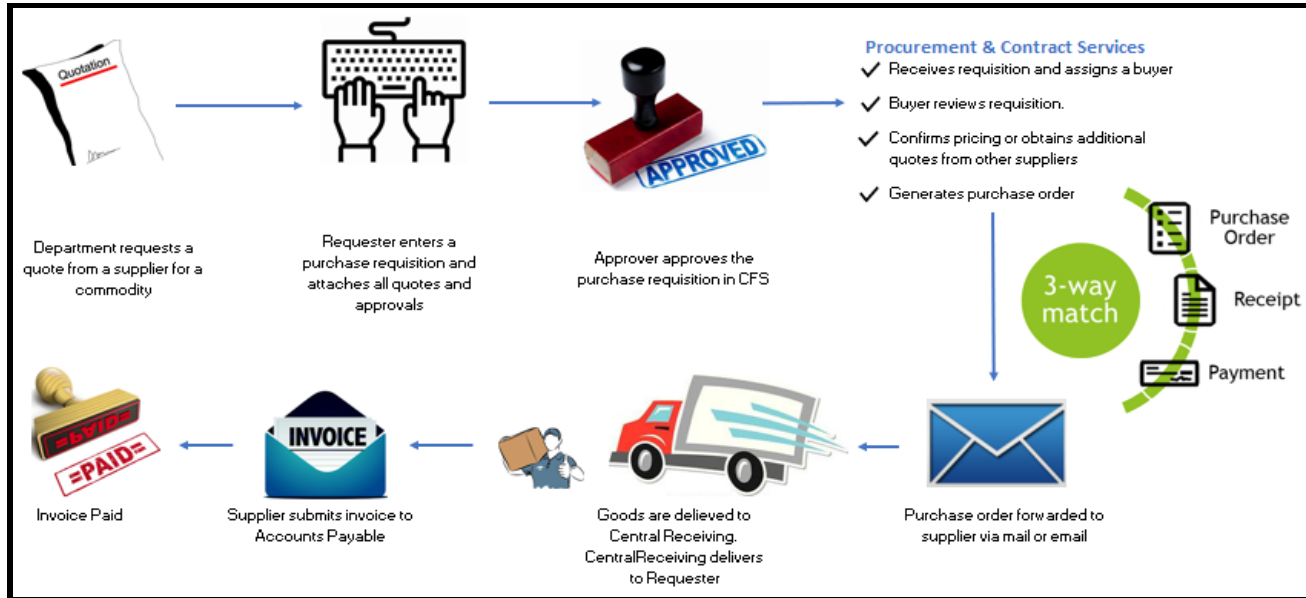
☐ Furniture - any new furniture or changes to the configuration of a space will need to be reviewed by Facilities Management for ADA compliance. Contact: [tania.nunez@csus.edu](mailto:tania.nunez@csus.edu)

☐ Hospitality items - any hospitality items purchased with state funds must meet the requirements as outlined in the Hospitality. <https://www.csus.edu/administration-business-affairs/internal/accounts-payable/hospitality.html>

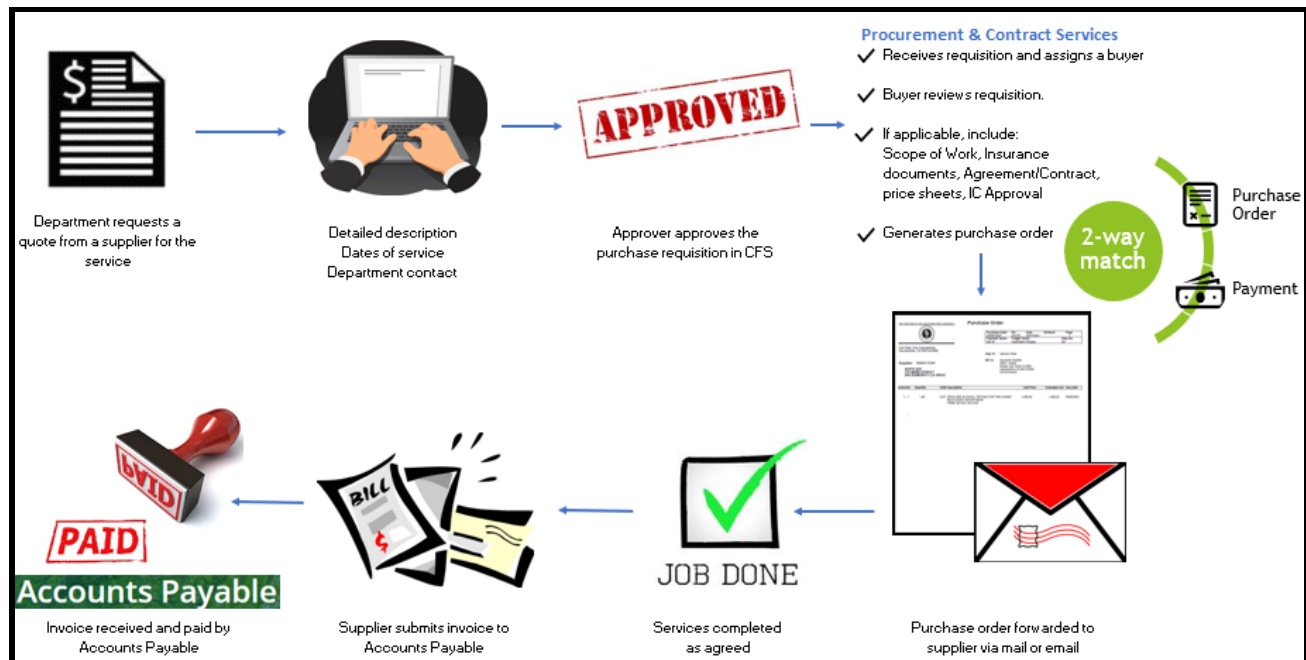
☐ ICT Review - Purchases of IT software and/or equipment require approval from Information Technology, as a result of Federal Law Section 508 and CSU Executive Order 926. <https://www.csus.edu/information-resources-technology/technology-procurement/submission-process-rev.html>

# CFS Requisition Process Guide

## Section 1.7 Requisition to Purchase Order Flow Chart – Tangible Goods (Commodity Code 57800)



## Section 1.8 Requisition to Purchase Order Flow Chart – Services (Commodity Code 96200)





# CFS Requisition Process Guide

## Section 2.0 How to Determine the Buyer of Record

1. Click on the diamond-shaped NavBar icon at the top right of the homepage.



2. Follow the following path. Navigator>Purchasing>Requisitions>Review Requisition Info>Requisition
3. Enter **Requisition ID** number
4. Click **OK**

**Requisition Inquiry**

Business Unit: SACST

Requisition ID: 3000038953

To Req:

Requisition Name:

Req Status:

Origin:

Requester:

Requester Name:

Requisition Date:

To:

Supplier SetID: SACST

Supplier ID:

Supplier Name:

Item SetID: SACST

Item Description:

254 characters remaining

Department:

Supplier Lookup

Supplier Details

Supplier Name Item ID:

Direct Ship: ☐

**OK** Cancel

5. Click on the **Requisition** number

Req Inquiry						
1-1 of 1						
Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
SACST	3000038953	3000038953	Complete	Physical_Therapy	03/03/2020	10,950.75

# CFS Requisition Process Guide

6. On the Requisition Details screen, click **“More”**. This screen will identify the **Buyer** number

**Requisition Details**

Business Unit SACST
Req ID 3000038953

Requester Physical\_Therapy

Requisition Date 03/03/2020
Merchandise Amount 10,950.75 USD

Req Status Complete
Pre-Encumbrance Balance 0.00 USD

**Requisition Details**

Details
More
Contract

Line	Status	Item ID	Description	Buyer	Supplier Item ID
1	Closed		212-B-VplusP-S3G. ValuePlus Si	60102088127	

Buyer name and number identified below

Buyer Name	Buyer Number
Davis, Leah J	60102015301
Davis, Timothy	60223000934
Head, Sebastian	60223022865
Holmberg, Kimberley	60102088127
House, Gary L	60223016560
Navarro, Victoria	60223021045
Paclibar, Kathleen	60223009657
Tilby, Terry Shon	60223024529