

# CSULB Purchasing Requisition Processing - CFS 9.2



Last Revised: 05/12/2025

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## Overview

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End users enter requisitions into the PeopleSoft Purchasing module as needed by departments. This is the recommended mechanism for requesting goods and services. Procurement runs daily processes to identify all new requisitions. The buyer assigned will review and process the requisition accordingly.

The online process allows the Requester who is identified on the requisition to know the status of their requisition as it moves throughout the accounting lifecycle. An email message to the Requester will occur following these actions:

- The purchase order (PO) is dispatched
- A change order to the PO occurs
- The purchase order is received
- A voucher payment is processed

### Objectives:

In this training guide, you will learn how to:

- Enter a requisition
- Approve a requisition
- Budget Check a requisition
- Delete a requisition
- Cancel a requisition
- Run Requisition Inquiries and Reports

## 1.0 Components of a Requisition

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This manual explains how to enter each component of a requisition and how the components relate to each other.

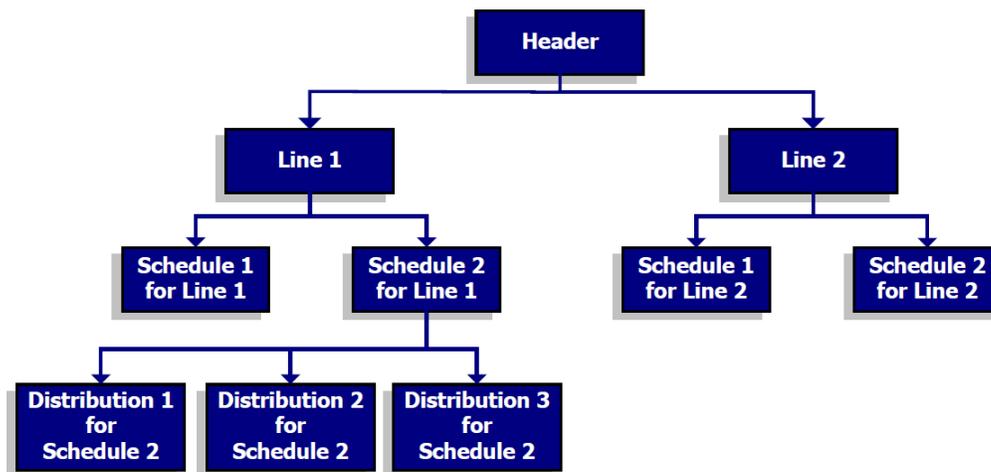
Multiple roles within CFS contribute to creating a requisition:

- **Data Entry** – Enters a requisition on behalf of another person
- **Requestor** – Person requesting goods
- **Approver** – Person listed in Delegation of Authority for chartfield being used

In PeopleSoft CFS, requisitions consist of four components:

- **Requisition/Header** – Defines the Business Unit, the Requester, Requisition Name, Dates, Status, Defaults and Comments.
- **Line** – Contains the line-item information: the quantity, category, UOM, description, supplier, and price.
- **Schedule** – Defines when (due date) and where you want the line items delivered.
- **Distribution** – Accounting information (i.e. the general ledger Chartfield string) is entered and the on-campus location (building-room) where the package is delivered. The Chartfield string includes the account, fund, department ID, program, class and project.

Each component of a requisition has a one-to-many relationship, starting with the header information and ending with the distribution information. For example, every requisition has a header, but a header can have several lines. Each line can have several schedules, and each schedule can have several lines of distribution information.



## 2.0 Creating a Requisition

Requesters will enter a requisition in the CFS PeopleSoft Purchasing Module.

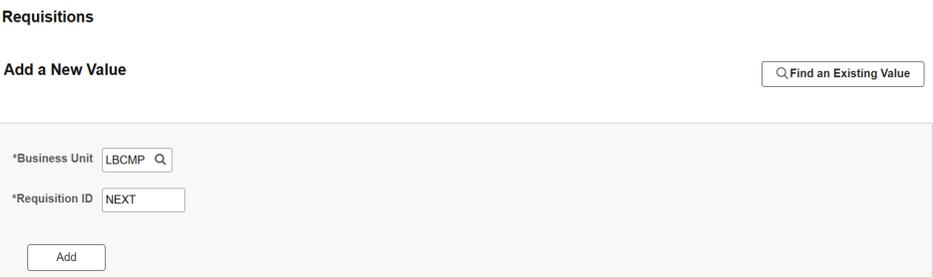
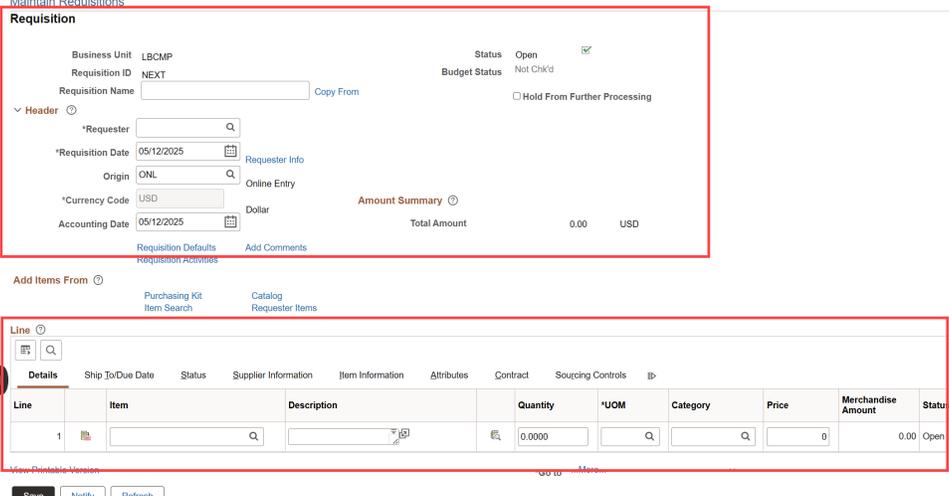
The **Add/Update Requisition** process consists of the following steps:

1. **Enter** the Requisition
2. **Validate** requisition data/**Approve**
3. **Budget Check** the requisition

## 2.1 Requisition Entry

Follow this navigation to access the requisition page:

*CFS Purchasing > Requisitions > Add/Update Requisitions – Add a New Value*

Processing Steps / Field Name	Screenshot / Description																					
<p><b>Business Unit:</b> Select LBCMP, LBFDN, or LB49R (Select LBFDN for G, C, and RS funds)</p> <p>Accept the “NEXT” Requisition ID number assigned. The Requisition ID defaults to the next available number when you save the requisition. <b>Do not change this field.</b></p> <p>Select “Add.”</p>	 <p><b>Requisitions</b></p> <p>Add a New Value <span style="float: right;">Find an Existing Value</span></p> <p>*Business Unit: LBCMP</p> <p>*Requisition ID: NEXT</p> <p>Add</p>																					
<p><b>Requisitions</b></p> <p>The Requisitions page contains General Information, Header and Line information, and other links.</p>	 <p>Maintain Requisitions <span style="float: right;">New Window   Help   Personalize Page</span></p> <p><b>Requisition</b></p> <p>Business Unit: LBCMP Status: Open <input checked="" type="checkbox"/>      Requisition ID: NEXT Budget Status: Not Chkd      Requisition Name: <input type="text"/> Copy From <input type="checkbox"/> Hold From Further Processing</p> <p>Header</p> <p>*Requester: <input type="text"/> Requisition Date: 05/12/2025 Origin: ONL *Currency Code: USD Accounting Date: 05/12/2025</p> <p>Amount Summary</p> <table border="1"> <tr> <td>Total Amount</td> <td>0.00</td> <td>USD</td> </tr> </table> <p>Add Items From</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Quantity</th> <th>UOM</th> <th>Category</th> <th>Price</th> <th>Merchandise Amount</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0000</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0</td> <td>0.00</td> <td>Open</td> </tr> </tbody> </table> <p>Save Notify Refresh</p>	Total Amount	0.00	USD	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"/>	0	0.00	Open
Total Amount	0.00	USD																				
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"/>	0	0.00	Open														

**Requisition/Header Information**

Enter the Requisition Header Information.

[Maintain Requisitions](#)

**Requisition**

Business Unit	LBCMP	Status	Open <input checked="" type="checkbox"/>
Requisition ID	NEXT	Budget Status	Not Chk'd
Requisition Name	<input type="text" value="Dept Ref #899999"/> <a href="#">Copy From</a>	<input type="checkbox"/> Hold From Further Processing	

▼ **Header** ⓘ

*Requester	<input type="text" value="40000036307"/> <input type="button" value="Q"/>	Bauer, Lisa
*Requisition Date	<input type="text" value="05/12/2025"/> <input type="button" value="📅"/>	<a href="#">Requester Info</a>
Origin	<input type="text" value="ONL"/> <input type="button" value="Q"/>	Online Entry
*Currency Code	<input type="text" value="USD"/>	Dollar
Accounting Date	<input type="text" value="05/12/2025"/> <input type="button" value="📅"/>	

**Amount Summary** ⓘ

Total Amount	0.00	USD
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[Requisition Defaults](#)   [Add Comments](#)  
[Requisition Activities](#)

Processing Steps / Field Name	Screenshot / Description
<b>Requisition Name</b>	User Defined. Requesters create a Requisition Name to identify the department's reference number. The Requisition Name carries over to the <b>Purchase Order Distribution Lines &gt; Req Detail</b> tab. The ability to inquire about this value varies according to the Requisition Inquiry screens.
<b>Status</b>	Displays the requisition status. Defaults to "Open."
<b>Budget Status</b>	Displays the requisition budget checking status and defaults to "Not Chk'd."
<b>Hold From Further Processing</b>	Hold from further processing prevents approval of the requisition and budget checking, allowing the user to continue working on an in-progress requisition.
<b>Requester</b>	Defaults to "End User ID" (campus ID number). Requesters may change this information.
<b>Req Date</b>	Defaults to current date.
<b>Origin</b>	<b>ONL. DO NOT CHANGE.</b>
<b>Accounting Date</b>	Defaults to the requisition creation date. You may change the date if you began working on the requisition before the month-end and did not finish it until the following month. However, the system will prompt you to change the date in this case. If prompted, update the Accounting Date field to the current date.
<a href="#">Requisition Defaults link</a>	See the <a href="#">Requisition Defaults</a> section.
<a href="#">Add Comments link</a>	See the <a href="#">Add Comments</a> section.

## Requisition Defaults

Enter defaults that apply to the entire requisition or to multiple lines on a requisition. You can override default values at the line, schedule, and distribution levels. You will not enter information in undefined fields. Select “OK” after specifying defaults.

Enter the following Default Information:

**Requisition Defaults**

Business Unit: LBCMP      Requisition Date: 05/14/2025  
 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: EA [ ]  
 Supplier: 0000062820 [ ] CITADEL CPM INC      Supplier Location: MAIN [ ]  
 Category: 42500 [ ]      Supplier Lookup: [ ]

**Schedule**

Ship To: RECEIVING [ ] CSULB Receiving Department      \*Distribute By: Quantity [ ]  
 Due Date: 06/27/2025 [ ]  
 Ultimate Use Code: [ ]      Ship Via: [ ]  
 Attention To: Mary Jane Smith room 170B      Freight Terms: [ ]

**Distribution**

SpeedChart: [ ]

**Distributions**

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Location	Budget Date	Description
1		LBCMP [ ]	[ ]	GF901 [ ]	00062 [ ]	[ ]	[ ]	[ ]	BH-170 [ ]	05/14/2025 [ ]	

OK    Cancel    Refresh

Processing Steps / Field Name	Screenshot / Description
<b>Default Options</b>	Use “Override” option. This will allow you more flexibility in populating fields. For example, to type another person’s name in the “Attention To” field, update the location or allocate to multiple distributions.
<b>Buyer</b>	<b>DO NOT CHANGE.</b> Purchasing will assign a buyer to the requisition.
<b>Supplier</b>	Specify the preferred supplier for the purchase. Use the magnifying glass next to Supplier or use the supplier lookup link to find the supplier name/ID. Suppliers may be changed by the buyer at the PO level. If the supplier is not available, please note the desired supplier in the header comments on the <b>Maintain Requisitions Page</b> (described in the Add/Edit Comments section below).
<b>Category</b>	Specify the category code from which most products will be purchased. This is the classification of Goods/Services which also determines the account number in your chartfield string. See Appendix B for most used category codes.  Category codes beginning with 0-8 typically are goods which are quantity based and therefore 3-way match (LBCMP, LBFDN, LB49R).  Category codes beginning with 9 typically are for services which require an authorized signature on the invoice, therefore a 2-way match (LBCMP, LFBND and/or LB49R), and are specified as “amount only.”
<b>Unit of Measure (UOM)</b>	Specify the Unit of Measure to be used as default for all of the items/products being purchased. The value may be changed at an individual line level. <b>Required.</b>
<b>Ship To</b>	Defaults to “RECEIVING.”
<b>Distribute By</b>	Defaults to “Quantity.” This value will automatically change when “Amount Only” is selected on the line.

Processing Steps / Field Name	Screenshot / Description
<b>Due Date</b>	Specify the desired date for items to be received. This date may be adjusted by the buyer at the PO level.
<b>Attention To</b>	Specify the person who is the ultimate recipient of the shipment. This field is used in combination with the Location field and will default to Requester Name value if not specified.
<b>GL Unit</b>	This will default to the user default business unit (LBCMP, LBFDN, LB49R). User will need to change when necessary. <b>Select LBFDN for G, C, and RS funds.</b>
<b>Account</b>	<b>DO NOT CHANGE.</b> Defaults based on Category code selected.
<b>Fund</b>	Specify default Fund. <b>Required.</b>
<b>Dept</b>	Specify default Department number. <b>Required.</b>
<b>Program</b>	Specify default Program.
<b>Class</b>	Specify default Class.
<b>Project</b>	Specify default Project. <b>Required for G funds only.</b>
<b>Location</b>	Specify the building and room number for Receiving to deliver the goods.

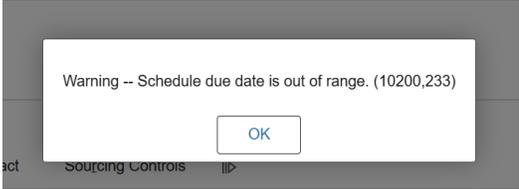
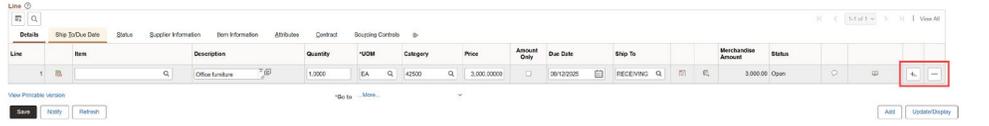
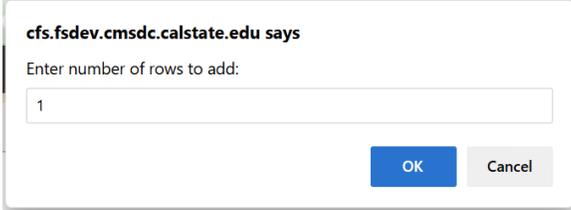
**Note:** If the requester modifies any Requisition Defaults after entering information in the requisition line, a “Retrofit Page” notification will appear, allowing the requester to update the existing lines with the new values selected. For single distributions, select “Apply.” For multiple distributions, select “Apply to All Distributions.”

**Note:** For Grants, Research Stimulation, or Center funds please use your assigned chartfield string. If you need assistance determining the correct chartfield string, please contact your Grants and Contracts Administrator (GCA).

**Line Info**

Enter the Requisition Line Information.

Processing Steps / Field Name	Screenshot / Description
<b>Description</b>	<p>Enter the description of the Good(s) or Service(s) you are requesting.</p> <p>Note: The Line Description should include the following (if applicable):</p> <ul style="list-style-type: none"> <li>• [BRIEF DESCRIPTION]: Define the item from the broadest to the more detailed – 18 characters</li> <li>• [PART NUMBER]: Begin entering part number or continue brief description if part number is not applicable – 10 characters</li> <li>• [DETAILED DESCRIPTION]: Use detailed description to clearly define the purchase</li> </ul> <p>Use the icon to the left of the description field to view “Line Details.”</p> <p>Note: If you populated the “Requisition Defaults” page, select “Refresh” to auto-fill applicable fields.</p>
<b>Quantity</b>	Quantity of the good(s) you want to purchase.
<b>UOM</b>	Unit of Measure.
<b>Category</b>	<p>Select the category code of the product that will be purchased. This is the classification of Good(s)/Service(s) which also determines the account number in your chartfield string. See Appendix B for most commonly used category codes.</p> <p>Category codes beginning with 0-8 typically are goods which are quantity based and therefore 3-way match (LBCMP, LBFND and LB49R).</p> <p>Category codes beginning with 9 are typically for services which require a authorized signature on the invoice and therefore a 2-way match and are <u>specified as amount only</u>.</p>
<b>Price</b>	Price per unit of measure.
<b>Amount Only</b>	<p>Always select “Amount Only” when entering a service-based requisition. Quantity based requisitions will not have this option selected.</p> <p>Amount Only requisitions will permit Accounts Payable to enter multiple invoices/vouchers on a service PO. The system will adjust the quantity to “1,” and will display a notification of this change. The line information will display “amt” instead of “qty.”</p>
<b>Due Date</b>	<p>This is the date you would like the goods/services to be completed. If the requisition needs an extended service time, enter the date by which you expect the service to expire.</p> <p>Note: Making a change to the due date does not guarantee delivery of the items or completion of the service by the requested date. In addition, if the date you entered</p>

Processing Steps / Field Name	Screenshot / Description
	<p>is greater than 30 days from the Requisition Date, you will receive a warning message. Once validated, select OK.</p> 
<p><b>Ship To Location</b></p>	<p><b>DO NOT CHANGE.</b> Defaults to RECEIVING.</p>
<p><b>Schedule Icon</b></p>	<p>Select the Schedule Icon  to navigate to the Schedule page.</p>
<p><b>Add/Delete Row</b></p> <p>To add or delete a Req Line, select the “+” or “-” at the end of the last line and specify the number of lines to add.</p>	 <p>For Adds – After you select the “+”, a dialog box will appear, and you will be prompted for the number of rows to add. Enter the number and select “OK”.</p> 

## Schedule Info

Use the [Maintain Requisitions - Schedule](#) page to specify the person to receive the goods, and to get to the chartfield distribution page.

If your quantity-based goods have multiple distributions, create a schedule for each distribution. For example, if Department 123 is purchasing 20 computers on behalf of three different departments, the schedule on line #1 – schedule #1 might have five computers distribution allocated to GF001-00748; line #1 – schedule #2 might have 12 computers with distribution allocated to GF001-00642; and line #1 – schedule #3 might have three computers with distribution allocated to GF001-00028.

For amount-only lines (services rendered), only one schedule is permitted. In the case of a service and amount only line, use multiple distributions to distribute by percentages.

Populate the following field values on the Requisition Schedule Information:

Maintain Requisitions  
Schedule

Business Unit LBCMP Requisition Date 05/14/2025  
Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	Office Furniture - desk for ma	1.0000	3,000.00	3,000.00	06/27/2025	Mary Jane Smith r	Active

Buttons: Save, Notify, Refresh, Add, Update/Display

Processing Steps / Field Name	Screenshot / Description
<a href="#">Return to Main Page</a>	This link takes you back to the Main Page of the requisition.
<b>Attention To</b>	This is used in conjunction with the Location. Specify the person to whom the goods should get delivered to. The Requester Name will default in this field. Override if necessary.
<b>Distribution Icon</b>	Select the Distribution Icon  to navigate to the Chartfields distribution page. Select the new Fund, Dept ID, program, or project ID, as desired.  Select "OK".  Select "Save".

**Distribution Info**

Use the Maintain Requisitions - Distribution page to specify the chartfield string to which to apply the payment of this request. Values previously populated in the Requisition Defaults section will appear in the fields.

Populate the following fields on the Requisition Distribution Information:

Maintain Requisitions New Window | P

**Distribution**

Requisition ID NEXT      Item Office Furniture - desk for ma  
 Line 1      Status Active  
 Schedule 1  
 Ship To RECEIVING      CSULB Recv      Quantity 1.0000 EA  
 \*Distribute By Quantity      Open Quantity 1.0000  
 Merchandise Amt 3.000 00 USD  
 SpeedChart  [Multi-SpeedCharts](#)

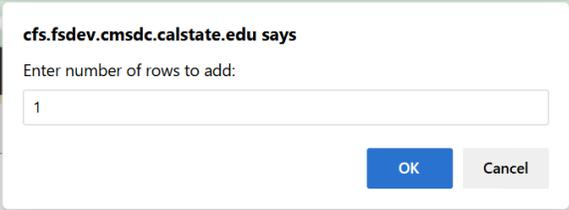
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**Distributions**

Chartfields    Details    Asset Information    Budget Information    IP

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Location
1	Open	100.0000	1.0000	3.000 00	LBCMP	619804	GF001	00062				BH-170

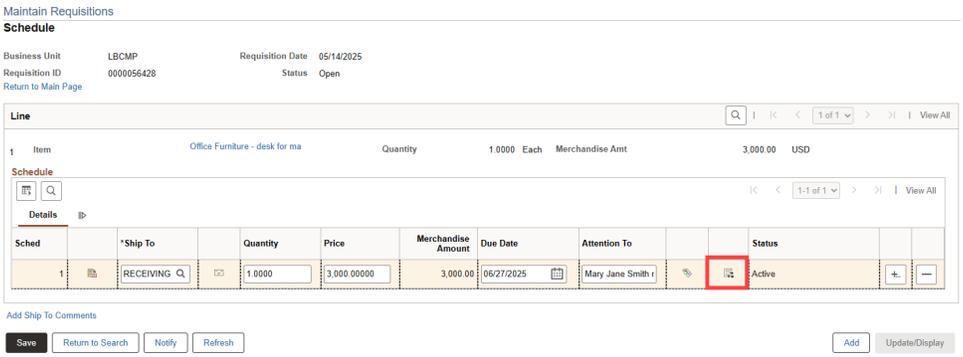
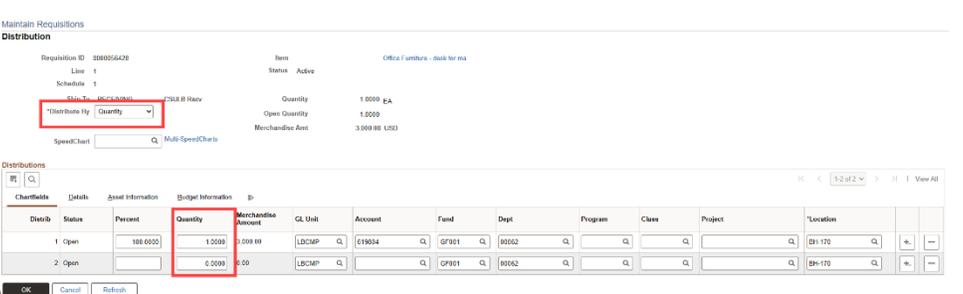
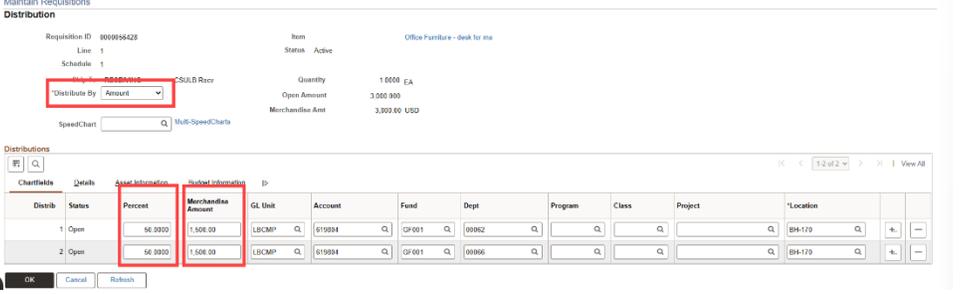
OK    Cancel    Refresh

Processing Steps / Field Name	Screenshot / Description
<b>GL Unit</b>	This will default to the user default business unit (LBCMP, LBFDN, LB49R). User will need to change when necessary. <b>Select LBFDN for G, C, and RS funds.</b>
<b>Account</b>	<b>DO NOT CHANGE.</b> Defaults from the Category Code specified on the Req Line or Req Line Defaults.
<b>Fund</b>	Enter the Fund number to charge. <b>Required.</b>
<b>Dept</b>	Enter the Department number to charge. May default from the requester settings. <b>Required.</b>
<b>Program</b>	Enter the Program code to charge.
<b>Class</b>	Enter the Class code to charge.
<b>Project</b>	Enter the Project code to charge. <b>Required for G funds only.</b>
<b>Add/Delete Row</b>  To add or delete a Distribution Line, select the "+" or "-" at the end of the last line and specify the number of lines to add.	 <p>Once you have completed your distribution, select the OK button to return to the Schedule page. Then select the "Save" button. This will assign a system generated requisition number.</p>
Select the <b>Save</b> button to assign a Requisition ID number.	

**Note:** Default Chatfield values can be stored as part of the user profile.

**Splitting the Distribution Info**

You can split the distribution by line/schedule among two or more departments and/or Chartfield strings. You can split distributions by quantity or amount. If you have correctly selected the amount only checkbox for services or not selected it for goods, then there should be no need to modify this drop-down option.

Processing Steps / Field Name	Screenshot / Description																																												
<p>From the Main Page, select the Schedule Icon  to navigate to the Schedule page.</p> <p>Then, select the Distribution Icon  to navigate to the <i>Distribution</i> page.</p>	 <p>Maintain Requisitions Schedule</p> <p>Business Unit LBCMP Requisition Date 05/14/2025 Requisition ID 0000056428 Status Open Return to Main Page</p> <p>Line 1 Item Office Furniture - desk for ma Quantity 1,000 Each Merchandise Amt 3,000.00 USD</p> <p>Schedule 1 of 1 View All</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>RECEIVING</td> <td>1,000.00</td> <td>3,000.00000</td> <td>3,000.00</td> <td>06/27/2025</td> <td>Mary Jane Smith</td> <td>Active</td> </tr> </tbody> </table> <p>Add Ship To Comments</p> <p>Save Return to Search Notify Refresh Add Update/Display</p>	Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	RECEIVING	1,000.00	3,000.00000	3,000.00	06/27/2025	Mary Jane Smith	Active																												
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1	RECEIVING	1,000.00	3,000.00000	3,000.00	06/27/2025	Mary Jane Smith	Active																																						
<p>From the <i>Distribution</i> page (Reduce the quantity and select the “+” to insert another distribution line.</p> <p>The remaining quantity will populate the quantity field in the added line.</p> <p>Change the distribution accordingly.</p>	 <p>Maintain Requisitions Distribution</p> <p>Requisition ID 0000056428 Item Office Furniture - desk for ma Line 1 Status Active Schedule 1 Distribute By: Quantity Quantity 1,000 EA Open Quantity 1,000 Merchandise Amt 3,000.00 USD</p> <p>SpeedChart Multi-SpeedCharts</p> <table border="1"> <thead> <tr> <th>Chartfields</th> <th>Details</th> <th>Asset Information</th> <th>Budget Information</th> <th>ID</th> </tr> <tr> <th>Distrib</th> <th>Status</th> <th>Percent</th> <th>Quantity</th> <th>Merchandise Amount</th> <th>GL Unit</th> <th>Account</th> <th>Fund</th> <th>Dept</th> <th>Program</th> <th>Class</th> <th>Project</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td>100.0000</td> <td>1,000.00</td> <td>3,000.00</td> <td>LBCMP</td> <td>619834</td> <td>GF001</td> <td>00062</td> <td></td> <td></td> <td></td> <td>BH-170</td> </tr> <tr> <td>2</td> <td>Open</td> <td></td> <td>0.0000</td> <td>0.00</td> <td>LBCMP</td> <td></td> <td>GF001</td> <td>00062</td> <td></td> <td></td> <td></td> <td>BH-170</td> </tr> </tbody> </table> <p>OK Cancel Refresh</p>	Chartfields	Details	Asset Information	Budget Information	ID	Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Location	1	Open	100.0000	1,000.00	3,000.00	LBCMP	619834	GF001	00062				BH-170	2	Open		0.0000	0.00	LBCMP		GF001	00062				BH-170
Chartfields	Details	Asset Information	Budget Information	ID																																									
Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Location																																	
1	Open	100.0000	1,000.00	3,000.00	LBCMP	619834	GF001	00062				BH-170																																	
2	Open		0.0000	0.00	LBCMP		GF001	00062				BH-170																																	
<p>To split the distribution by dollar amount, use the drop down to change the <b>Distribute by</b> from Quantity to Amount and enter the dollar amounts.</p> <p>Modify the Fund, Dept, and other fields as necessary.</p> <p>Click the <b>OK</b> button to return to the Schedule page, then <b>Save</b>; then click the link to <i>Return to Main Page</i>.</p>	 <p>Maintain Requisitions Distribution</p> <p>Requisition ID 0000056428 Item Office Furniture - desk for ma Line 1 Status Active Schedule 1 Distribute By: Amount Quantity 1,000 EA Open Amount 3,000.000 Merchandise Amt 3,000.00 USD</p> <p>SpeedChart Multi-SpeedCharts</p> <table border="1"> <thead> <tr> <th>Chartfields</th> <th>Details</th> <th>Asset Information</th> <th>Budget Information</th> <th>ID</th> </tr> <tr> <th>Distrib</th> <th>Status</th> <th>Percent</th> <th>Merchandise Amount</th> <th>GL Unit</th> <th>Account</th> <th>Fund</th> <th>Dept</th> <th>Program</th> <th>Class</th> <th>Project</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td>50.0000</td> <td>1,500.00</td> <td>LBCMP</td> <td>619834</td> <td>GF001</td> <td>00062</td> <td></td> <td></td> <td></td> <td>BH-170</td> </tr> <tr> <td>2</td> <td>Open</td> <td>50.0000</td> <td>1,500.00</td> <td>LBCMP</td> <td>619834</td> <td>GF001</td> <td>00066</td> <td></td> <td></td> <td></td> <td>BH-170</td> </tr> </tbody> </table> <p>OK Cancel Refresh</p>	Chartfields	Details	Asset Information	Budget Information	ID	Distrib	Status	Percent	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Location	1	Open	50.0000	1,500.00	LBCMP	619834	GF001	00062				BH-170	2	Open	50.0000	1,500.00	LBCMP	619834	GF001	00066				BH-170			
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<p>The budget check icon will appear following the requisition approval.</p> <p>The Budget Check process occurs during a nightly scheduled process, after which the Budget Status will change from “Not Chk’d” to “Valid.”</p>	<p><b>Budget Check Icon -</b> </p> <p>Maintain Requisitions Requisition</p> <p>Business Unit LBCMP Requisition ID 0000056428 Requisition Name Dept Ref #89999</p> <p>Status Approved  Budget Status Not Chk'd  <input type="checkbox"/> Hold From Further Processing</p> <p>▼ Header ⓘ</p>
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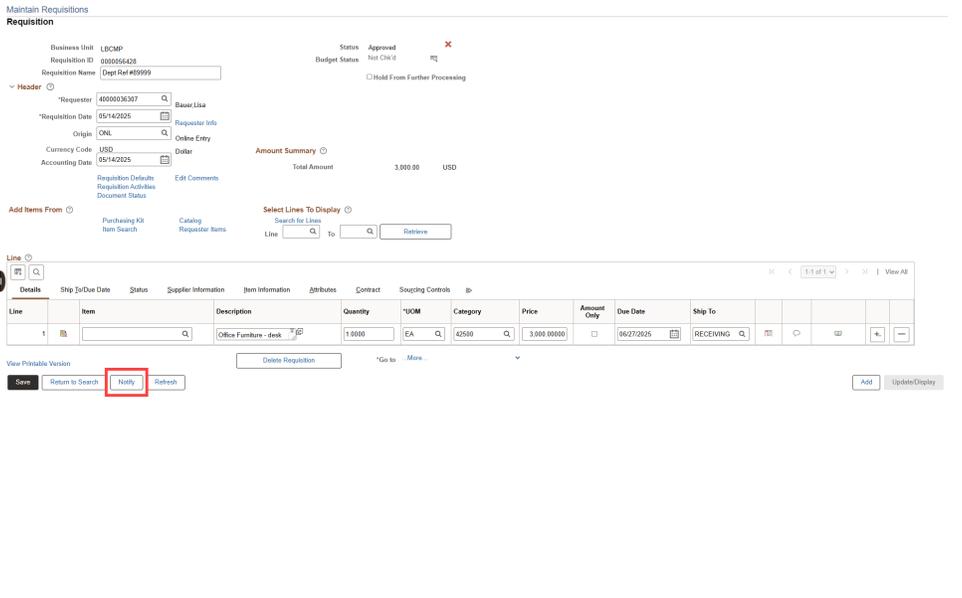
**Important Notes:**

- You cannot edit a requisition after the requisition becomes a Purchase Order. Make changes to requests by contacting the assigned Buyer.
- Reconciling Requisitions – Purchasing and Procurement will automatically cancel all requisitions that are 90 days old and have a balance remaining. Procurement will close all requisitions at year-end. This will result in the Requisitions Pre Encumbrance balance reducing to \$0.00.

**2.3 Notifications**

Use the “Notify” button to generate and send a system message to another person, such as the approver or a buyer. Consider including your own email address in the cc or bcc field so you have a copy of the email for your records.

**Note:** For Grants, Research Stimulation, or Center funds, your approver will be your assigned Grants & Contracts Administrator (GCA). You will enter your GCA’s email address in the “To” field to notify them your purchase requisition is ready for review.

Processing Steps / Field Name	Screenshot / Description
<p>From the Requisition Main Page, select the <b>Notify</b> Button.</p>	 <p>The screenshot shows the 'Maintain Requisitions Requisition' page. At the bottom of the page, there are several buttons: 'Save', 'Return to Search', 'Notify', and 'Refresh'. The 'Notify' button is highlighted with a red rectangular box. Other visible elements include the requisition details (Business Unit: LBCMP, Requisition ID: 0000056428, Requisition Name: Dept Ref #89999), status (Approved), and budget status (Not Chk'd). A table with one line item is also visible, showing 'Office Furniture - desk' with a quantity of 1.0000.</p>

The Send Notification Page  
will display.

Enter the Information.

### Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.  
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

[Lookup Recipient](#)

#### Notification Details

To:

CC:

BCC:

Priority:

Subject:

Template:   
1 - This is a request to approve the Requisition  
2 - This is a general inquiry

Message:

[Delivery Options](#)  
 RichText

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.  
Click Apply to send this notification and remain on this page.

Processing Steps / Field Name	Screenshot / Description
<b>To</b>	Use the “Lookup Recipient” option to look up by last name, first name (the recipient must have PeopleSoft access to view the requisition). If the recipient does not automatically populate, <u>you must manually enter in the email address.</u>
<b>CC</b>	Use the “Lookup Recipient” option to look up by last name,first name. If the recipient does not automatically populate, <u>you must manually enter in the email address.</u>
<b>BCC</b>	Use the “Lookup Recipient” option to look up by last name,first name. If the recipient does not automatically populate, <u>you must manually enter in the email address.</u>  Note: you may choose to insert your own email address for a record of when you send the message.
<b>Priority</b>	Select the priority of the message. Defaults to “2-Med”.
<b>Subject</b>	Subject is auto-generated and should be changed if the number is not accurate. Defaults to “1” which is a request to approve the requisition (reference template of message for all options available).
<b>Template</b>	Non-editable field.
<b>Message</b>	This is a free form field where you can type a description. If the purpose of the notify button is a change request, explain the details of the change request in the message box.

### 3.0 Requisition Approval (for non-requestors)

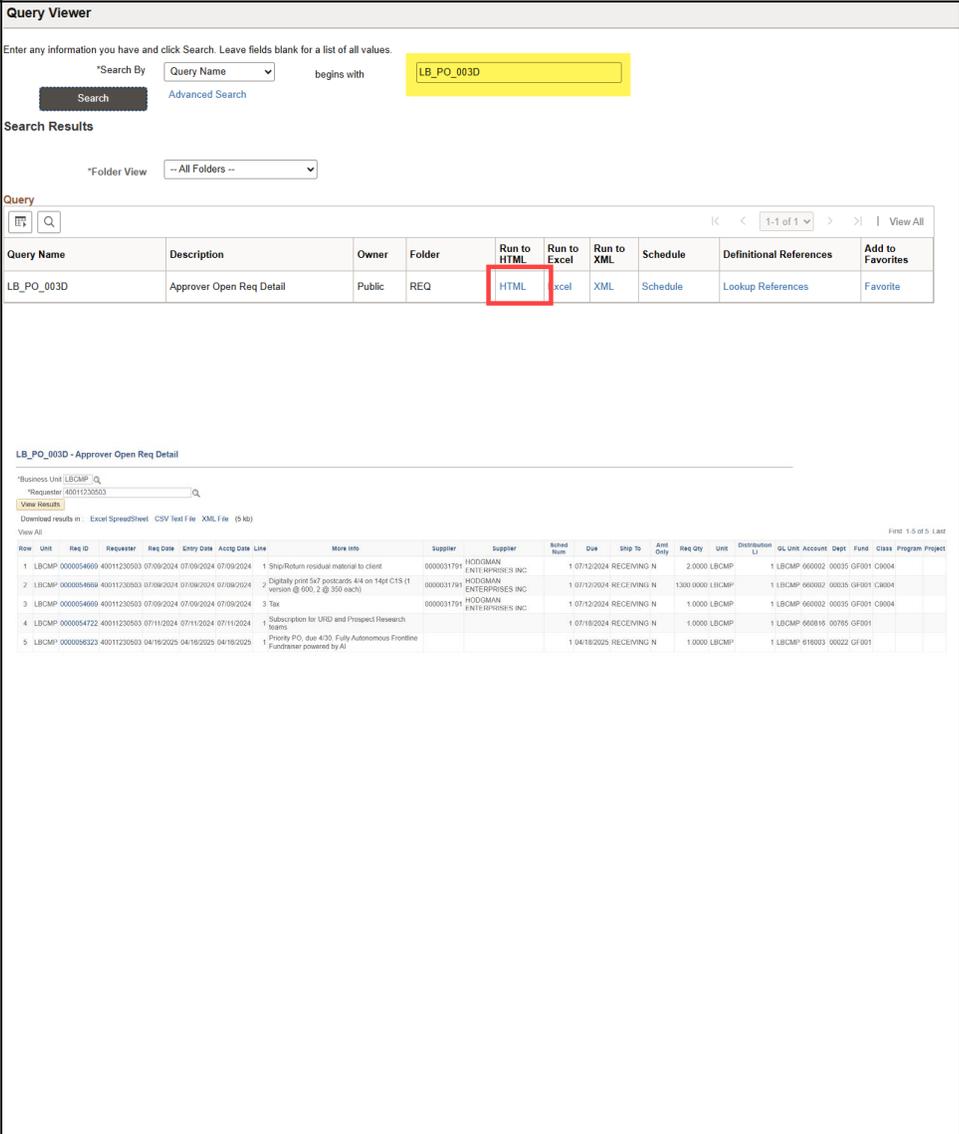
If the Requestor does not have approval authority for requisitions, the next step is to get the authorized approver to Approve and Budget Check the requisition.

The Purchasing Department will receive the requisition and create the purchase order on behalf of the campus for approved requisitions. The approver must have the appropriate Delegation of Authority level to approve the requisition amount.

Refer to this section to view the line, schedule and distribution information for each requisition using a query. Then search and find and approve the requisition. If modifications are required, the requestor can make the changes. You may edit requisitions any time prior to approval.

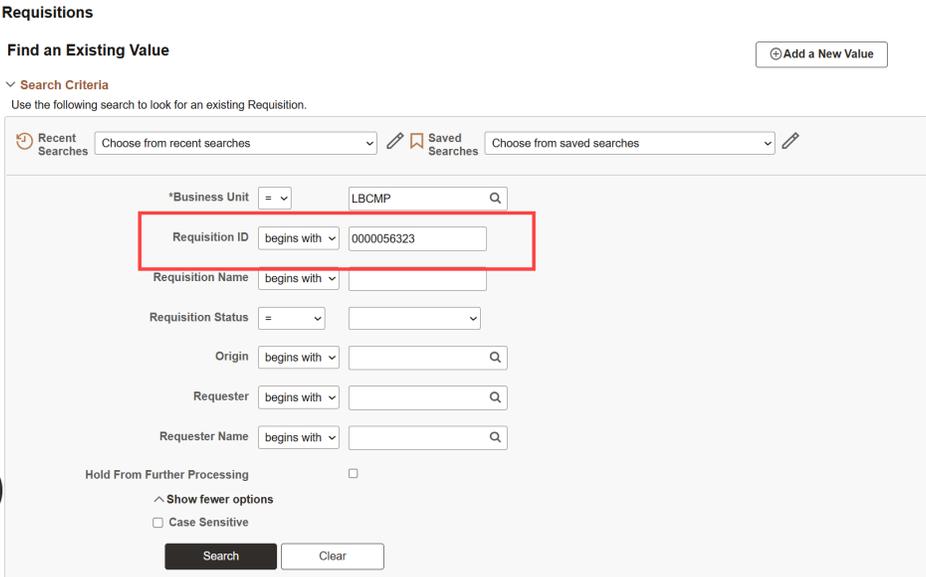
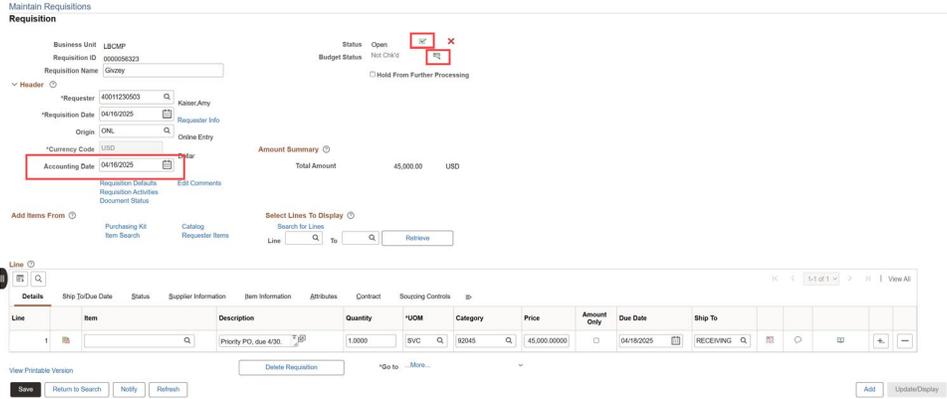
#### Review the Requisition Lines and Distribution

Navigation: Purchasing > Query > Query Viewer

Processing Steps / Field Name	Screenshot / Description																																																																																																																																																																				
<p>In the Search By field/box, select Query Name LB_PO_003D.</p> <p>Select <b>“Search”</b>.</p> <p>Select <b>“HTML”</b> on the right of the table to run the query to a new window.</p> <p>Select the appropriate Business Unit: LBCMP, LBFND, or LB49R.</p> <p>Next to the Requestor field/box, select the magnifying glass. Select the Requestor ID (40 + 9 digit campus ID). Optional: you may type the entire ID if known to get immediate results.</p> <p>Select the <b>“View Results”</b> button.</p> <p>Note: The report will display all requisitions and lines, with the associated chartfields and the total amount for the requisition. Review and then use the link on the first column (Req ID) and it will automatically launch to the Add/Update window OR Search for the Requisition using the steps in the next section.</p>	 <p><b>Query Viewer</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>*Search By: Query Name (dropdown) begins with: LB_PO_003D (text box)</p> <p>Search (button) Advanced Search (text)</p> <p><b>Search Results</b></p> <p>*Folder View: --All Folders-- (dropdown)</p> <p><b>Query</b></p> <table border="1"> <thead> <tr> <th>Query Name</th> <th>Description</th> <th>Owner</th> <th>Folder</th> <th>Run to HTML</th> <th>Run to Excel</th> <th>Run to XML</th> <th>Schedule</th> <th>Definitional References</th> <th>Add to Favorites</th> </tr> </thead> <tbody> <tr> <td>LB_PO_003D</td> <td>Approver Open Req Detail</td> <td>Public</td> <td>REQ</td> <td>HTML</td> <td>xcel</td> <td>XML</td> <td>Schedule</td> <td>Lookup References</td> <td>Favorite</td> </tr> </tbody> </table> <p><b>LB_PO_003D - Approver Open Req Detail</b></p> <p>*Business Unit: LBCMP (dropdown) Q</p> <p>*Requestor: 401123553 (dropdown) Q</p> <p>View Results (button)</p> <p>Download results in: Excel Spreadsheet CSV Text File XML File (0 kb)</p> <p>View All (button)</p> <table border="1"> <thead> <tr> <th>Row</th> <th>Unit</th> <th>Req ID</th> <th>Requestor</th> <th>Req Date</th> <th>Entry Date</th> <th>Acctg Date</th> <th>Line</th> <th>More Info</th> <th>Supplier</th> <th>Supplier</th> <th>Sched Num</th> <th>Due</th> <th>Ship To</th> <th>Avail Only</th> <th>Req Qty</th> <th>Unit</th> <th>Distribution Lt</th> <th>GL Unit Account</th> <th>Dept</th> <th>Fund</th> <th>Class</th> <th>Program</th> <th>Project</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>LBCMP</td> <td>000054699</td> <td>401123553</td> <td>07/09/2024</td> <td>07/09/2024</td> <td>07/09/2024</td> <td>1</td> <td>Ship/Return residual material to client</td> <td>000031791</td> <td>HODGMAN ENTERPRISES INC</td> <td></td> <td>1 07/12/2024</td> <td>RECEIVING</td> <td>N</td> <td>2.0000</td> <td>LBCMP</td> <td>1</td> <td>LBCMP 660002</td> <td>00035</td> <td>GF001</td> <td>CR004</td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>LBCMP</td> <td>000054699</td> <td>401123553</td> 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Qty	Unit	Distribution Lt	GL Unit Account	Dept	Fund	Class	Program	Project	1	LBCMP	000054699	401123553	07/09/2024	07/09/2024	07/09/2024	1	Ship/Return residual material to client	000031791	HODGMAN ENTERPRISES INC		1 07/12/2024	RECEIVING	N	2.0000	LBCMP	1	LBCMP 660002	00035	GF001	CR004			2	LBCMP	000054699	401123553	07/09/2024	07/09/2024	07/09/2024	2	Digitally print 5x7 postcards 414 on 140# C15 (1 version @ 600, 2 @ 350 each)	000031791	HODGMAN ENTERPRISES INC		1 07/12/2024	RECEIVING	N	1300.0000	LBCMP	1	LBCMP 660002	00035	GF001	CR004			3	LBCMP	000054699	401123553	07/09/2024	07/09/2024	07/09/2024	3	Tax	000031791	HODGMAN ENTERPRISES INC		1 07/12/2024	RECEIVING	N	1.0000	LBCMP	1	LBCMP 660002	00035	GF001	CR004			4	LBCMP	000054722	401123553	07/11/2024	07/11/2024			Subscription for URD and Prospect Research Reports				1 07/18/2024	RECEIVING	N	1.0000	LBCMP	1	LBCMP 660016	00785	GF001				5	LBCMP	000096323	401123553	04/16/2025	04/16/2025			Priority PO, due 430, Fully Autonomous Frontline Fundraiser 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**Search for the Requisition to Approve**

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

Processing Steps / Field Name	Screenshot / Description																				
<p>Select the tab labeled <b>“Find an Existing Value”</b>.</p> <p>In the Requisition ID field/box, type in the entire <b>“Requisition ID”</b></p> <p>Select <b>“Search”</b>.</p> <p>Select the appropriate requisition by clicking on it.</p>	 <p><b>Requisitions</b></p> <p><b>Find an Existing Value</b> <span style="float: right;">⊖ Add a New Value</span></p> <p>▼ <b>Search Criteria</b> Use the following search to look for an existing Requisition.</p> <p>Recent Searches: Choose from recent searches   Saved Searches: Choose from saved searches</p> <p>*Business Unit: LBCMP</p> <p><b>Requisition ID: begins with 0000056323</b></p> <p>Requisition Name: begins with</p> <p>Requisition Status: =</p> <p>Origin: begins with</p> <p>Requester: begins with</p> <p>Requester Name: begins with</p> <p>Hold From Further Processing: <input type="checkbox"/></p> <p>^ Show fewer options</p> <p><input type="checkbox"/> Case Sensitive</p> <p><b>Search</b> Clear</p>																				
<p>Verify the accounting date is within the same month as requisition approval date. If not, change the accounting date to the current date.</p> <p>Select the green checkmark to Approve the requisition.</p> <p>Although the Budget Check Icon is visible, you will not have authorization to select it. The Budget Check process will occur during a regularly scheduled time.</p> <p>Select <b>“Save”</b>.</p>	 <p>Maintain Requisitions</p> <p><b>Requisition</b></p> <p>Business Unit: LBCMP   Requisition ID: 0000056323   Status: Open   Budget Status: Not Chk'd</p> <p>Requester: 4001123053   Requisition Date: 04/16/2025   Accounting Date: 04/16/2025</p> <p>Total Amount: 45,000.00 USD</p> <p><b>Status: Approved</b> <span style="color: red; font-size: 2em;">✗</span></p> <p><b>Budget Status: Not Chk'd</b> <span style="color: red; font-size: 2em;">✗</span></p> <p><input type="checkbox"/> Hold From Further Processing</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Quantity</th> <th>UOM</th> <th>Category</th> <th>Price</th> <th>Amount Only</th> <th>Due Date</th> <th>Ship To</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Priority PD, Que 430</td> <td>1.0000</td> <td>SVC</td> <td>92045</td> <td>45,000.00000</td> <td></td> <td>04/16/2025</td> <td>RECEIVING</td> </tr> </tbody> </table> <p>Buttons: Save, Return to Search, Notify, Refresh, Add, Update/Display</p>	Line	Item	Description	Quantity	UOM	Category	Price	Amount Only	Due Date	Ship To	1		Priority PD, Que 430	1.0000	SVC	92045	45,000.00000		04/16/2025	RECEIVING
Line	Item	Description	Quantity	UOM	Category	Price	Amount Only	Due Date	Ship To												
1		Priority PD, Que 430	1.0000	SVC	92045	45,000.00000		04/16/2025	RECEIVING												

## 4.0 Requisition Deletions

You can delete a requisition line, schedule, or distribution by selecting the Delete Row button on the respective requisition page.

### 4.1 Deleting the Entire Requisition

You can delete an entire requisition by selecting the Requisition Delete icon on the Requisitions page. To delete an entire requisition, the requisition must meet the following criteria:

- The requisition is not on hold
- The requisition has never been successfully budget checked
- You are authorized to delete entire requisitions
- No requisition lines have been sourced to a purchase order
- No requisition schedules are staged

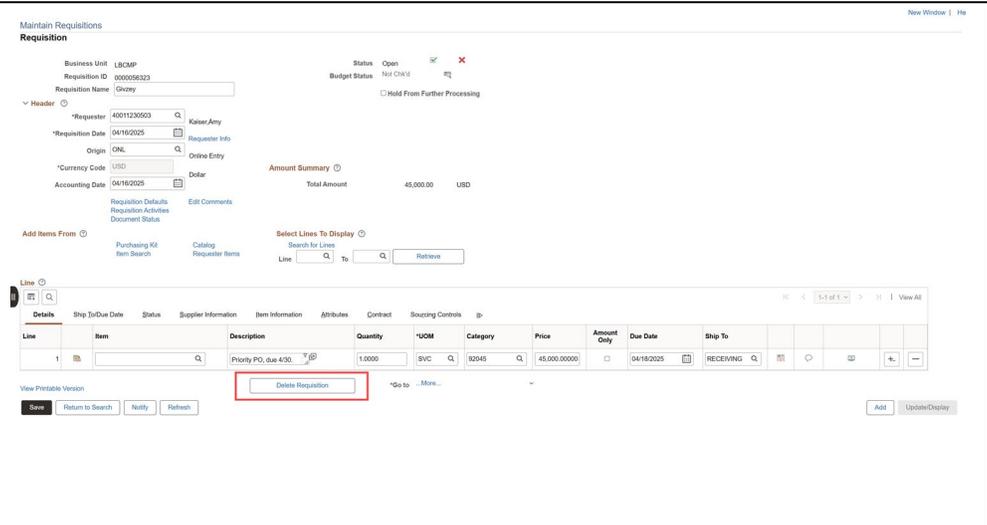
The following navigation is used to Delete requisition information:

*Purchasing > Requisitions > Add/Update Requisitions*

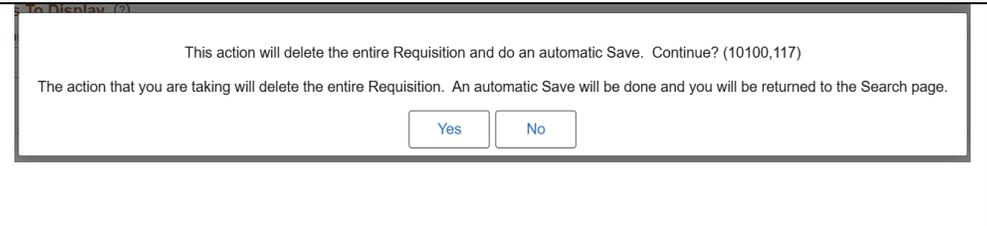
Processing Steps / Field Name	Screenshot / Description
<p>The first step is to call up the requisition you want to Delete.</p> <p>Select the “Find an Existing Value” tab. Enter in the Requisition Number or the Requester. Select the Search button.</p>	

If the Requisition is available to be deleted the “Delete Requisition” button will be available to select.

**Note:** If you are in the process of creating a Requisition, and have not navigated from the page, you must exit and then return to access the “Delete Requisition” button on the requisition.



You will receive a warning message. Select Yes if you are sure you want to Delete the Req.



You may view a deleted requisition while in inquiry mode.

## 4.2 Deleting the Requisition Line, Schedule, or Distribution

The following navigation is used to Delete requisition information:

*Purchasing > Requisitions > Add/Update Requisitions*

Processing Steps / Field Name	Screenshot / Description
<p>To delete a Requisition Line, Schedule, or Distribution, select the appropriate section and then the “-” next to the row you want to delete.</p>	<p>The screenshot shows the 'Maintain Requisitions' page for a requisition with ID 000099428. The status is 'Approved' and budget status is 'Not Check'. The total amount is 4,440.00 USD. In the 'Line' table, the second row (Line 2) is highlighted with a red box, and a minus sign (-) is visible in the rightmost column of that row.</p>

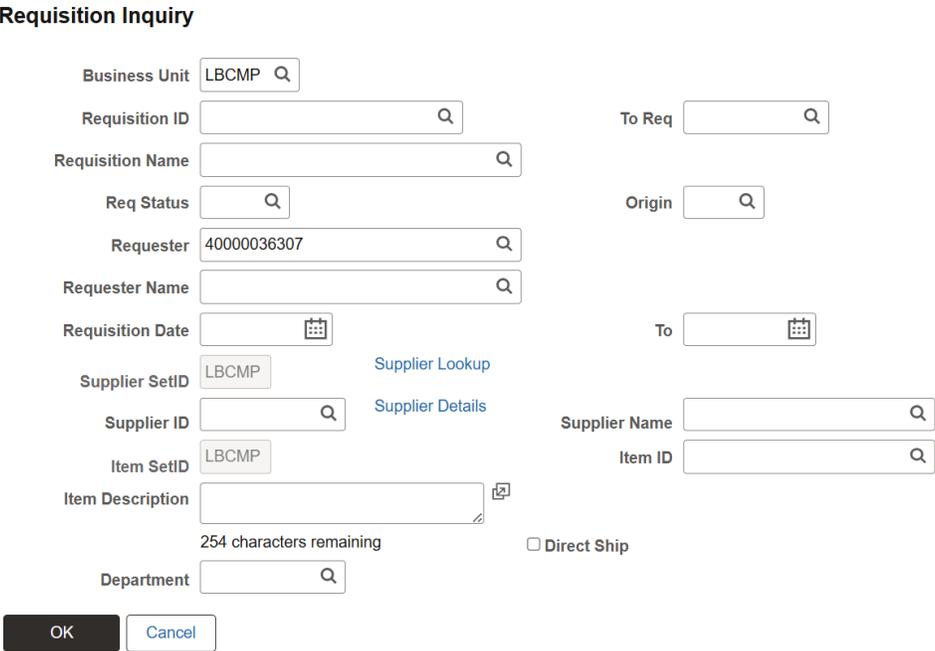
**Note:** You may not edit a Requisition after it has been Approved, Budget checked and Sourced to a Purchase Order. Submit a change request using the “Notify” button on the purchase order to update approved requisitions.

## 5.0 Requisition Inquiries

### 5.1 Requisition

This inquiry is useful in helping you find your Requisition number or details about a specific Requisition. You can use this to search by your Name/ID (requester) or all requisitions associated with a specific Department. This inquiry gives you line-by-line information for your requisitions, as well as providing access to pages that contain more details about the selected requisition.

Navigation: Purchasing > Review Requisition Info > Review Requisitions

Processing Steps / Field Name	Screenshot / Description														
<p>Enter criteria for selecting requisitions to view on the Requisitions Inquiry page. (Use as few or as many of the criteria fields as desired).</p> <p>Select "OK".</p> <p>Requisitions meeting the criteria are displayed.</p> <p><b>Note:</b> For the Requester field, use "40" + 9-digit employee ID</p>	 <p><b>Requisition Inquiry</b></p> <p>Business Unit: LBCMP</p> <p>Requisition ID: [Search]</p> <p>Requisition Name: [Search]</p> <p>Req Status: [Search]</p> <p>Requester: 40000036307</p> <p>Requester Name: [Search]</p> <p>Requisition Date: [Calendar]</p> <p>Supplier SetID: LBCMP <a href="#">Supplier Lookup</a></p> <p>Supplier ID: [Search] <a href="#">Supplier Details</a></p> <p>Item SetID: LBCMP</p> <p>Item Description: [Text Area] (254 characters remaining)</p> <p>Department: [Search]</p> <p>To Req: [Search]</p> <p>Origin: [Search]</p> <p>To: [Calendar]</p> <p>Supplier Name: [Search]</p> <p>Item ID: [Search]</p> <p><input type="checkbox"/> Direct Ship</p> <p>OK Cancel</p>														
<p>Click the Requisition link to open the requisition you wish to view.</p>	 <p>Req Inquiry</p> <p>1-1 of 1   View All</p> <table border="1"> <thead> <tr> <th>Unit</th> <th>Requisition</th> <th>Requisition Name</th> <th>Requisition Status</th> <th>Requester</th> <th>Req Date</th> <th>Total Amt</th> </tr> </thead> <tbody> <tr> <td>LBCMP</td> <td>0000056428</td> <td>Dept Ref #89999</td> <td>Approved</td> <td>Bauer,Lisa</td> <td>05/14/2025</td> <td>4,440.00 USD</td> </tr> </tbody> </table> <p>Search</p> <p>Notify</p>	Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	LBCMP	0000056428	Dept Ref #89999	Approved	Bauer,Lisa	05/14/2025	4,440.00 USD
Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt									
LBCMP	0000056428	Dept Ref #89999	Approved	Bauer,Lisa	05/14/2025	4,440.00 USD									

Requisitions

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card			
LBCMP	0000033557		Approved	White,Wanda	09/19/2013	7,812.40 USD				Y							
LBCMP	0000033047		Open	White,Wanda	05/31/2013	1,212.92 USD											
LBCMP	0000033043		Open	White,Wanda	05/30/2013	1,802.00 USD											
LBCMP	0000032486		Complete	White,Wanda	02/13/2013	0.00 USD											
LBCMP	0000032398		Complete	White,Wanda	01/29/2013	3,638.70 USD				Y	Y		Y				
LBCMP	0000032117		Complete	White,Wanda	11/01/2012	0.00 USD											

Search

Field Name	Description
<b>Requisition</b>	Select the Requisition you wish to view. You will be able to drill down to the Line, Schedule and Distribution details.
<b>On PO (on purchase order)</b>	Select the link <a href="#">Y</a> or <a href="#">P</a> values to access the Requisition to Purchase Order List page. Y (yes) - All lines appear on purchase orders. P (partial): Some lines appear on purchase orders.
<b>Received</b>	Select the link <a href="#">Y</a> or <a href="#">P</a> values to access the Requisition Receipts List page. Y (yes) - All lines appear on receipts. P (partial) - Some lines appear on receipts.

Field Name	Description
On Voucher	Select the linked <u>Y</u> or <u>P</u> values to access the Requisition to Voucher List page. Y (yes) - All lines appear on vouchers. P (partial) - Some lines appear on vouchers.
Document Status	Select to drill to the Document Status Inquiry page.
Approval History	Select to view Approval History.
Comments	Select to view the Requisition Comments.

## 5.2 Document Status

Use the inquiry to determine whether a Requisition has been sourced into a Purchase Order, is associated with a contract; or has been Received, Vouchered, or Paid. This inquiry displays all associated documents - the Purchase Order, Voucher/Supplier Invoice, Payment, and Receipt of items.

Navigation: Purchasing > Requisitions > Requisition Document Status

Processing Steps / Field Name	Screenshot / Description
<p>Enter criteria for selecting requisitions to view on the Document Status page.</p> <p>Select <b>“Search”</b>.</p> <p>Requisitions meeting the criteria will be displayed.</p>	

Those Document Types that have been associated with the requisition will appear. (Payment, PO, Contract, Receipt, and/or Voucher)

Select the Document ID to drill to additional details relating to the document selected or use the Related Info tab to access links to Accounting Entries.

Business Unit LBCMP  
Document Date 01/29/2013  
Currency USD  
Requester White,Wanda

Req ID 0000032398  
Status Complete  
Document Type Requisition  
Merchandise Amt 3,638.70  
Budget Status Valid

Show All

**Associated Document**

Documents
Related Info
»

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		LBCMP	Purchase Order	0000043018	Compl	02/11/2013	0000000278	MAIN	
▼ Actions		LBCMP	Receipt	0000021014	Received	02/20/2013	0000000278	MAIN	
▼ Actions		LBCMP	Voucher	00379469	Posted	02/14/2013	0000000278	MAIN	
▼ Actions	LBCMP		Payment	708948	Posted	03/15/2013	0000000278	MAIN	

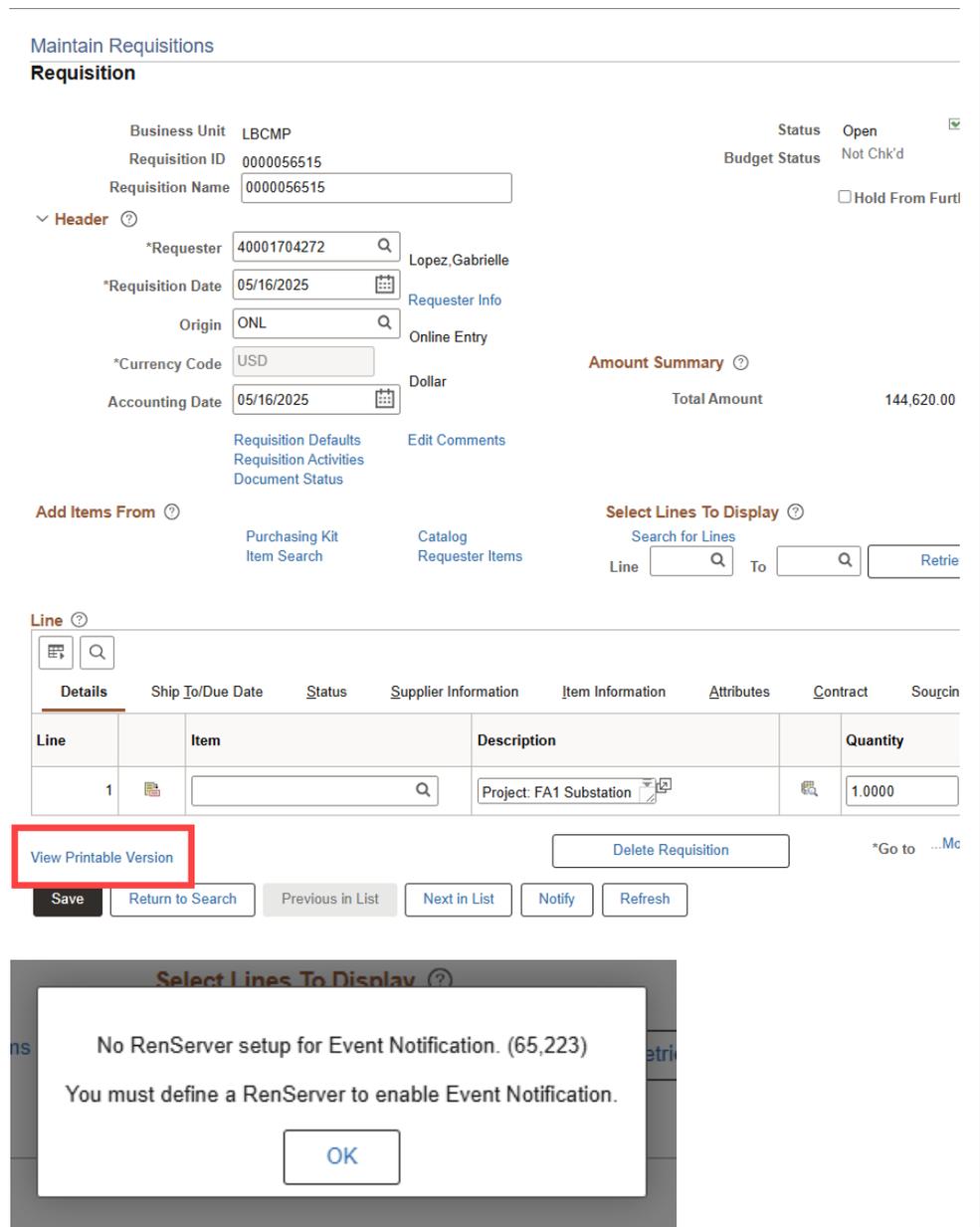
Return to Search

## 6.0 Print Requisition

There are two methods of printing requisitions. The first is printing the requisition from the Add/Update page (typically during the open status). The second is to print an approved requisition.

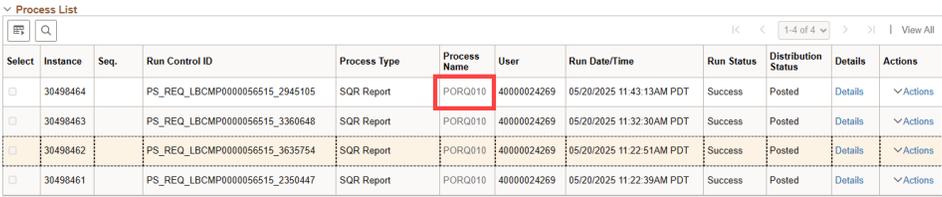
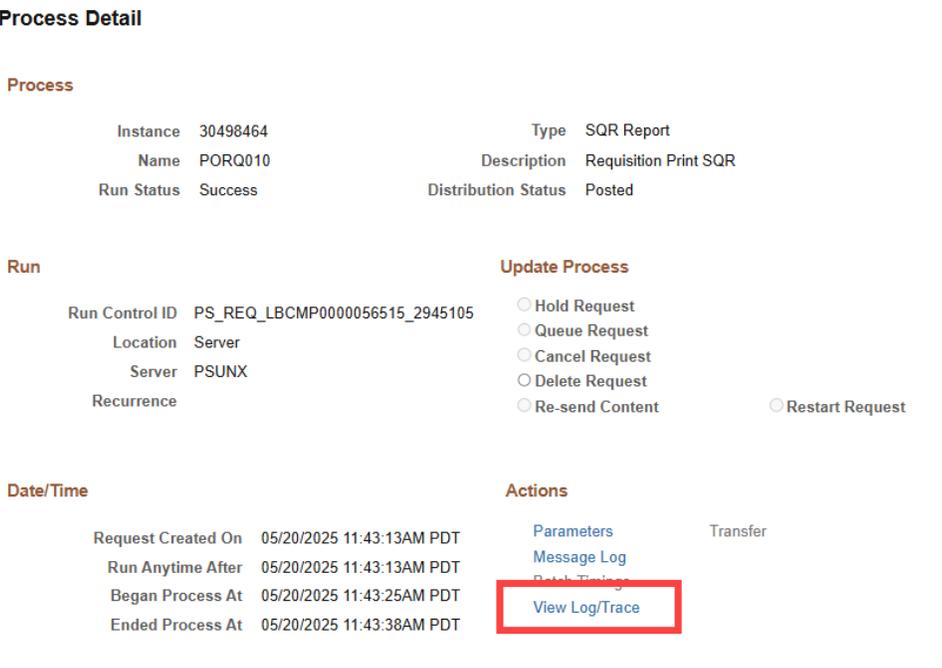
### 6.1 Printing a Requisition from the Add/Update page

Navigation: Purchasing > Requisitions > Add/Update Requisitions > Find an Existing Value

Processing Steps / Field Name	Screenshot / Description								
<p>1. Select <b>“View Printable Version”</b></p> <p>2. An error message may appear. If so, select <b>“OK”</b> to acknowledge the warning.</p> <p>Note: Despite the warning, your job has already gone to print and just needs to be picked up from Process Monitor.</p> <p>3. Proceed to the Process Monitor using the navigation below</p>	 <p>Maintain Requisitions <b>Requisition</b></p> <p>Business Unit LBCMP Status Open <input checked="" type="checkbox"/>      Requisition ID 0000056515 Budget Status Not Chk'd      Requisition Name 0000056515 <input type="checkbox"/> Hold From Furtl</p> <p>▼ Header ⓘ</p> <p>*Requester 40001704272 Lopez, Gabrielle      *Requisition Date 05/16/2025 Requirer Info      Origin ONL Online Entry      *Currency Code USD Dollar      Accounting Date 05/16/2025</p> <p>Amount Summary ⓘ      Total Amount 144,620.00</p> <p>Requisition Defaults Requisition Activities Document Status Edit Comments</p> <p>Add Items From ⓘ      Purchasing Kit Item Search Catalog Requirer Items</p> <p>Select Lines To Display ⓘ      Search for Lines      Line <input type="text"/> To <input type="text"/> <input type="button" value="Retrieve"/></p> <p>Line ⓘ</p> <p>Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcin</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text"/></td> <td>Project: FA1 Substation</td> <td>1.0000</td> </tr> </tbody> </table> <p><b>View Printable Version</b> <input type="button" value="Delete Requisition"/> *Go to ...Mc</p> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/></p> <p>Select Lines To Display ⓘ</p> <p>No RenServer setup for Event Notification. (65,223)      You must define a RenServer to enable Event Notification.  <input type="button" value="OK"/></p>	Line	Item	Description	Quantity	1	<input type="text"/>	Project: FA1 Substation	1.0000
Line	Item	Description	Quantity						
1	<input type="text"/>	Project: FA1 Substation	1.0000						

## 6.2 Opening Process Monitor

Navigation: PeopleTools > Process Scheduler > Process monitor

Processing Steps / Field Name	Screenshot / Description																																																												
<p>5. Look for the process name <b>"PORQ010"</b></p> <p>6. Select <b>Details</b></p>	 <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Run Control ID</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>30498464</td> <td></td> <td>PS_REQ_LBCMP0000056515_2945105</td> <td>SQR Report</td> <td>PORQ010</td> <td>40000024269</td> <td>05/20/2025 11:43:13AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td>Actions</td> </tr> <tr> <td><input type="checkbox"/></td> <td>30498463</td> <td></td> <td>PS_REQ_LBCMP0000056515_3360648</td> <td>SQR Report</td> <td>PORQ010</td> <td>40000024269</td> <td>05/20/2025 11:32:30AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td>Actions</td> </tr> <tr> <td><input type="checkbox"/></td> <td>30498462</td> <td></td> <td>PS_REQ_LBCMP0000056515_3635754</td> <td>SQR Report</td> <td>PORQ010</td> <td>40000024269</td> <td>05/20/2025 11:22:51AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td>Actions</td> </tr> <tr> <td><input type="checkbox"/></td> <td>30498461</td> <td></td> <td>PS_REQ_LBCMP0000056515_2350447</td> <td>SQR Report</td> <td>PORQ010</td> <td>40000024269</td> <td>05/20/2025 11:22:39AM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td>Actions</td> </tr> </tbody> </table>	Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions	<input type="checkbox"/>	30498464		PS_REQ_LBCMP0000056515_2945105	SQR Report	PORQ010	40000024269	05/20/2025 11:43:13AM PDT	Success	Posted	Details	Actions	<input type="checkbox"/>	30498463		PS_REQ_LBCMP0000056515_3360648	SQR Report	PORQ010	40000024269	05/20/2025 11:32:30AM PDT	Success	Posted	Details	Actions	<input type="checkbox"/>	30498462		PS_REQ_LBCMP0000056515_3635754	SQR Report	PORQ010	40000024269	05/20/2025 11:22:51AM PDT	Success	Posted	Details	Actions	<input type="checkbox"/>	30498461		PS_REQ_LBCMP0000056515_2350447	SQR Report	PORQ010	40000024269	05/20/2025 11:22:39AM PDT	Success	Posted	Details	Actions
Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions																																																		
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<p>7. Select <b>View Log/Trace</b></p>	 <p><b>Process Detail</b></p> <p><b>Process</b></p> <p>Instance 30498464      Type SQR Report      Name PORQ010      Description Requisition Print SQR      Run Status Success      Distribution Status Posted</p> <p><b>Run</b></p> <p>Run Control ID PS_REQ_LBCMP0000056515_2945105      Location Server      Server PSUNX      Recurrence</p> <p><b>Update Process</b></p> <p><input type="radio"/> Hold Request  <input type="radio"/> Queue Request  <input type="radio"/> Cancel Request  <input type="radio"/> Delete Request  <input type="radio"/> Re-send Content      <input type="radio"/> Restart Request</p> <p><b>Date/Time</b></p> <p>Request Created On 05/20/2025 11:43:13AM PDT      Run Anytime After 05/20/2025 11:43:13AM PDT      Began Process At 05/20/2025 11:43:25AM PDT      Ended Process At 05/20/2025 11:43:38AM PDT</p> <p><b>Actions</b></p> <p>Parameters      Transfer      Message Log      View Log/Trace</p>																																																												

8. Select the **PDF** file.

The **PDF** document will open in another tab and is ready to print.

**View Log/Trace**

**Report**

Report ID 19779036      Process Instance 30498464      [Message Log](#)  
 Name PORQ010      Process Type SQR Report  
 Run Status Success

Requisition Print SQR

**Distribution Details**

Distribution Node FACFSPSA      Expiration Date

**File List**

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_30498464.log	1,751	05/20/2025 11:43:38.827481AM PDT
<b>porq010_30498464.PDF</b>	5,103	05/20/2025 11:43:38.827481AM PDT
porq010_30498464.out	70	05/20/2025 11:43:38.827481AM PDT

**Distribute To**

Distribution ID Type	Distribution ID
User	40000024269

**Requisition**

CA State University Long Beach

**Ship To:** CSULB Receiving Department  
 1331 Palo Verde Avenue  
 Long Beach CA 90840-0005

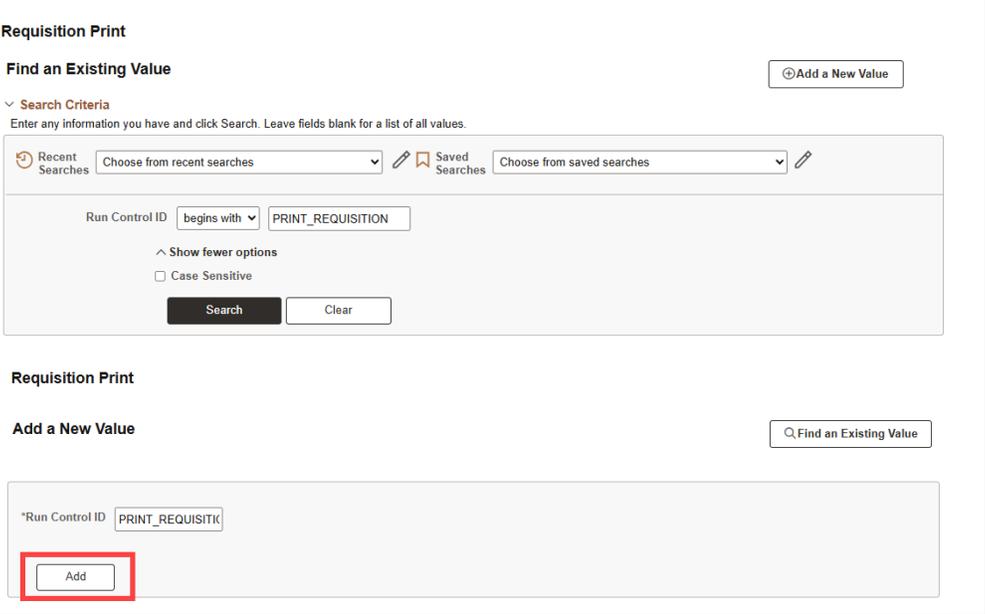
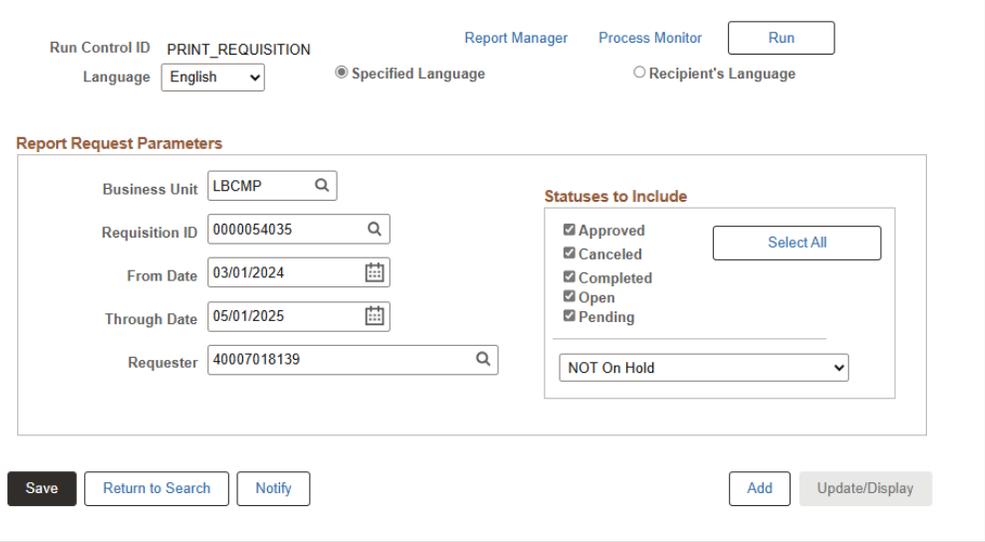
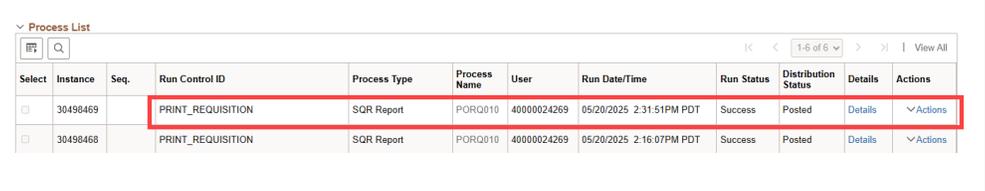
Business Unit: <b>LBCMP OPEN</b>		Page 1
Req ID	Date	
000056515	05/16/2025	
Requester	Telephone	Entered By
Lopez, Gabrielle	562/985-4175	Lopez, Gabrielle

Line-Sch-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project			Dist Amt

### 6.3 Printing an Approved Requisition

If you want to print a hard copy of your requisition, you will use the following steps. If you select print from the requisition screen, use the following navigation to print requisition information:

Navigation: *Purchasing > Review Requisition Info > Print Requisition*

Processing Steps / Field Name	Screenshot / Description																																				
<p>1. Enter the <b>PRINT_REQUISITION</b> run control ID.</p> <p>2. Select <b>Search</b>. If there are no results, select <b>Add</b> to add a new value.</p>																																					
<p>Select:</p> <p>3. Business Unit</p> <p>4. Requisition ID</p> <p>5. Other statuses, as needed.</p> <p>Select <b>“Save”</b></p> <p>Select <b>“Run”</b></p>																																					
<p>6. Navigate to the <b>Process Monitor</b> to retrieve the job.</p>	 <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq</th> <th>Run Control ID</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>30498469</td> <td></td> <td>PRINT_REQUISITION</td> <td>SQR Report</td> <td>POR0010</td> <td>40000024269</td> <td>05/20/2025 2:31:51PM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td>Actions</td> </tr> <tr> <td><input type="checkbox"/></td> <td>30498468</td> <td></td> <td>PRINT_REQUISITION</td> <td>SQR Report</td> <td>POR0010</td> <td>40000024269</td> <td>05/20/2025 2:16:07PM PDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td>Actions</td> </tr> </tbody> </table>	Select	Instance	Seq	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions	<input type="checkbox"/>	30498469		PRINT_REQUISITION	SQR Report	POR0010	40000024269	05/20/2025 2:31:51PM PDT	Success	Posted	Details	Actions	<input type="checkbox"/>	30498468		PRINT_REQUISITION	SQR Report	POR0010	40000024269	05/20/2025 2:16:07PM PDT	Success	Posted	Details	Actions
Select	Instance	Seq	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions																										
<input type="checkbox"/>	30498469		PRINT_REQUISITION	SQR Report	POR0010	40000024269	05/20/2025 2:31:51PM PDT	Success	Posted	Details	Actions																										
<input type="checkbox"/>	30498468		PRINT_REQUISITION	SQR Report	POR0010	40000024269	05/20/2025 2:16:07PM PDT	Success	Posted	Details	Actions																										

**Report Example:**

**Requisition**  
 CA State University Long Beach

**Ship To:** CSULB Receiving Department  
 1331 Palo Verde Avenue  
 Long Beach CA 90840-0005

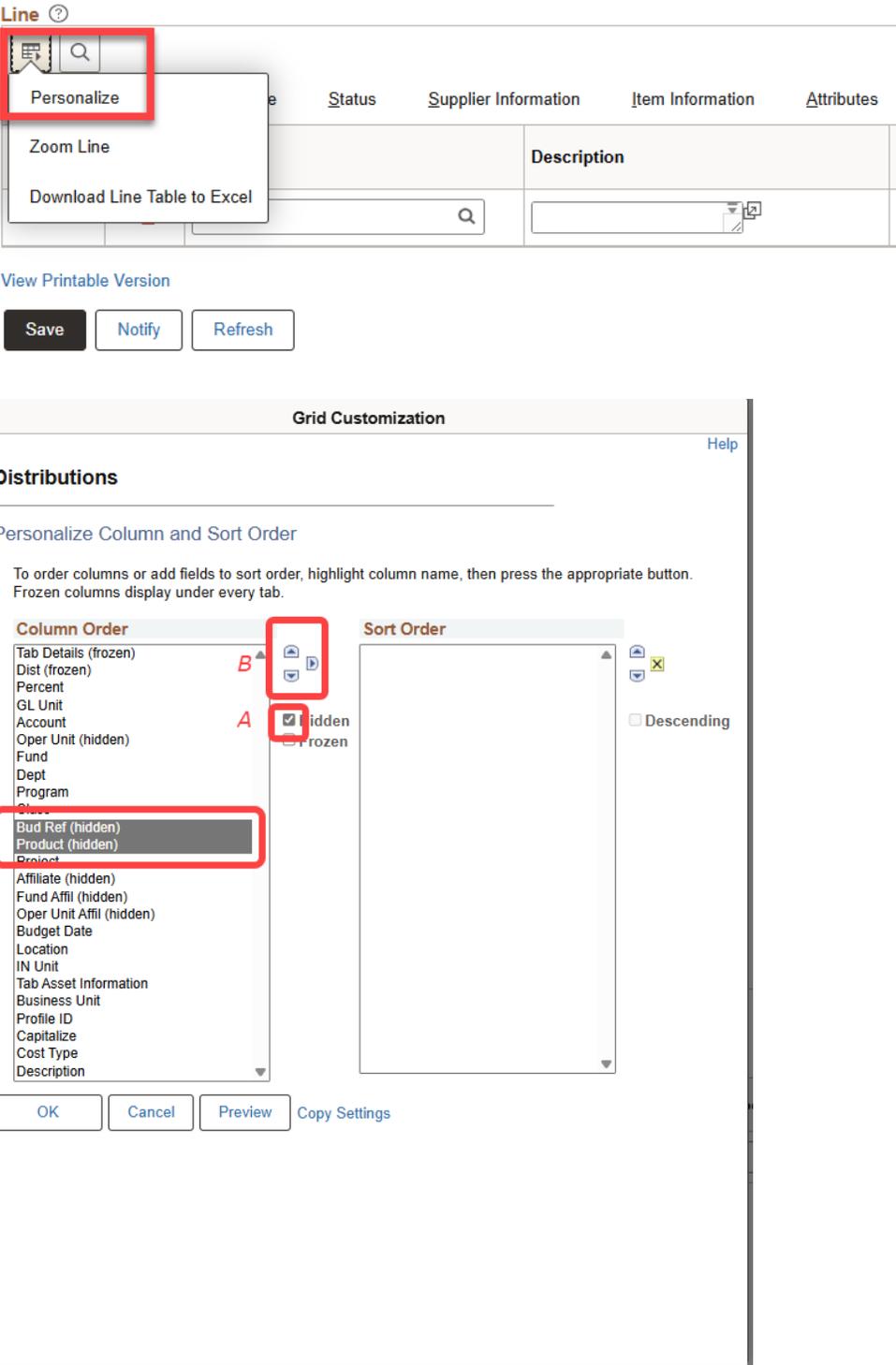
<b>Business Unit:</b>		<b>LBCMP</b>	<b>COMPLETE</b>
Req ID	Date	Page	
0000054034	05/08/2024	1	
Requester	Telephone	Entered By	
Followell,Shauna	562/985-4128	Followell,Shauna	

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project		Dist Amt	
Buyer: Alvear,Marcella									
1-1	Shuttle to Angels Stadium for Commencement			55698	1.0000	SVC	3,742.50	3,742.50	05/17/2024
1-1-1	660003	GF001	00686						3,742.50
<u>Line Total:</u>								3,742.50	
<u>Total Requisition Amount:</u>								3,742.50	

Please see attached invoice for the campus shuttle to Angels Stadium for Commencement. CSULB contact: Jessica Lane

## 7.0 Personalize

Personalizing your windows can streamline your experience in CFS. There are multiple locations to personalize your experience. One location is on the Requisition Header Defaults page > Distributions section; but fields can also be personalized on the Line, Schedule, and Distribution pages. The goal is to display the fields you need to populate.

Processing Steps / Field Name	Screenshot / Description
<ol style="list-style-type: none"> <li>To personalize, select the "Personalize" link.</li> <li>In the Personalize Column and Sort Order window, select the fields you want to hide and select the hidden checkbox. (Optional: Press and hold the Ctrl key and select multiple fields at once before selecting the hidden checkbox.</li> <li>Select OK to save changes and close the window.</li> <li>You may also choose to reorder fields. If so, use the up or down arrows until the field is in the desired location.</li> </ol>	 <p>The screenshot shows two parts of the software interface. The top part is the 'Line' window, where a 'Personalize' dropdown menu is open, showing options like 'Zoom Line' and 'Download Line Table to Excel'. The bottom part is the 'Grid Customization' window for 'Distributions', which allows users to 'Personalize Column and Sort Order'. It features two columns: 'Column Order' and 'Sort Order'. In the 'Column Order' list, 'Bud Ref (hidden)' and 'Product (hidden)' are highlighted with red boxes, and their 'hidden' checkboxes are checked. Red boxes also highlight the up/down arrow icons and the 'hidden' checkbox. At the bottom of the window are buttons for 'OK', 'Cancel', 'Preview', and 'Copy Settings'.</p>

The recommended layout for Requisition Defaults is the following:

The recommended layout for the Requisition Line is the following (move Amount Only from Attributes to Details tab):

Line 

Details		Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls					
Line	Description	Quantity	*UOM	Category	Amount Only	Price	Merchandise Amount	Status					
1	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	0.00	Open	<input type="text"/>				

## 8.0 Req to Check

Within CFS, a notification process automatically notifies the requestor at various points in the life of requisition. The subject of these emails will be Req to Check Daily Summary and will summarize all activity for the day.

1. When the requisition is sourced into a PO **and** that PO has been dispatched.
2. When the Purchase Order has a change processed by Purchasing (that meets change order criteria).
3. When goods on the Purchase Order are received at Shipping and Receiving.
4. Any time a payment is made to the supplier.

## Appendix A – Inquiries Matrix

Module	Inquiry Name	Use	Navigation
Supplier	Supplier	This page enables you to view Supplier information.	Suppliers > Supplier Information > Add/Update > Suppliers
Supplier	Review Supplier	This page enables you to search for a Supplier ID.	Suppliers > Supplier Information > Add/Update > Review Suppliers
Purchasing	Requisitions	View line-by-line information for your requisitions, as well as access pages that contain more details about the selected requisition.	Purchasing > Requisitions > Review Requisition Information > Requisitions
Purchasing	Req Accounting Entries	Shows the requisition accounting distribution by line and schedule. This information shows after a requisition has been Budget Checked.	Purchasing > Requisitions > Review Requisition Information > Accounting Entries
Purchasing	Req Document Status	Shows details of receivers, purchase orders, payments, and Voucher/Supplier Invoices posted against a req.	Purchasing > Requisitions > Review Requisition Information > Document Status Requisition
Purchasing	Review Change Orders	Review Change Order history.	Purchasing > Purchase Orders > Manage Change Orders > Review PO Change Orders
Purchasing	Purchase Order	Shows details of each page of a PO (lines, schedule, distribution, header, and comments).	Purchasing > Purchase Orders > Review PO Information > Purchase Orders
Purchasing	Activity Summary	Lists all receipts and invoices on a PO as well as the quantity and amount that have been matched.	Purchasing > Purchase Orders > Review PO Information > Activity Summary
Purchasing	PO Accounting Entries	Shows the accounting distribution by line and schedule. This information shows after a PO has been Budget Checked.	Purchasing > Purchase Orders > Review PO Information > PO Accounting Entries
Purchasing	PO Document Status	Shows details of requisitions, receivers, Voucher/Supplier Invoices and payments posted against a PO.	Purchasing > Purchase Orders > Review PO Information > Document Status PO
Purchasing	CSU PO Remaining Balance Inquiry	The CSU PO Remaining Balance Inquiry page can be used to research Purchase Order remaining balances and all related Voucher/Supplier Invoices.	Purchasing > Purchase Orders > Review PO Information > CSU PO Remaining Balance Inquiry

Module	Inquiry Name	Use	Navigation
Purchasing	Receipts	Shows receivers posted against a purchase order.	Purchasing > Receipts > Review Receipt Information > Receipts
Purchasing	Receipt Document Status	Access and review information about procurement documents associated with a receipt.	Purchasing > Receipts > Review Receipt Information > Document Status Receipt
Purchasing	Contracts	Shows the details of a contract.	Procurement Contracts > Add/Update Contracts > Find an Existing Value
Purchasing	Review Contracts by PO	Displays all the POs associated with a contract.	Procurement Contracts > Review Contract Information > Review Contracts by PO

## Appendix B – Common Category Codes

---

Code	Description
03100	Hvac Parts
05098	Art Supplies
17598	Chem Lab Supplies
20400	Computer, Micro & Peripherals
20700	Computer Accessories/Supplies
20800	Computer Software, Micro
20900	Computer Software, Mainframe
28545	Projector Lamps
28700	Electronic Equip, Misc
33500	Fertilizers & Soil Conditioner
42500	Furniture, Office
42558	Recycled Plastic Office Furnit
46500	Hospital/Surgical, Equip & Sup
49000	Lab Equip - General
49098	Lab Supplies - Gen
49500	Lab Equipment - Biology
49598	Lab Supplies - Biology
55600	Mass Transp-Buses
57800	Miscellaneous Products
61500	Office Supplies, General
62500	Optical Equipment
67098	Plumbing Supplies
72500	Telecom/Radio/Phone Equipment
72551	Telephone Cellular/Radio
88000	Visual Ed Equipment
91000	Building Maint & Repair Svs
91400	Construction Services
91800	Consulting Svs
92045	Software/License Renewals
92400	Educational Svs
93921	Computer Maintenance & Repair
96100	Misc Prof Services
96200	Miscellaneous Services
96287	TRAVEL, IN STATE WITH CONTRACT
96600	Printing & Related Svs
98100	Rent/Lease Equip Svs: General