CSULB Purchasing
Requisition Processing - CFS 9.2

Last Revised: **05/12/2025**

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Overview

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

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

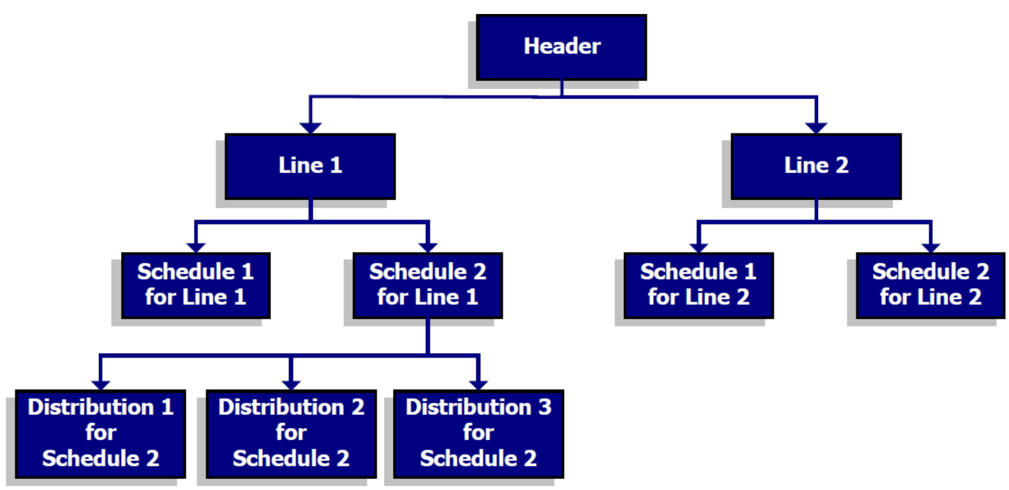
Multiple roles within CFS contribute to creating a requisition:

- **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.

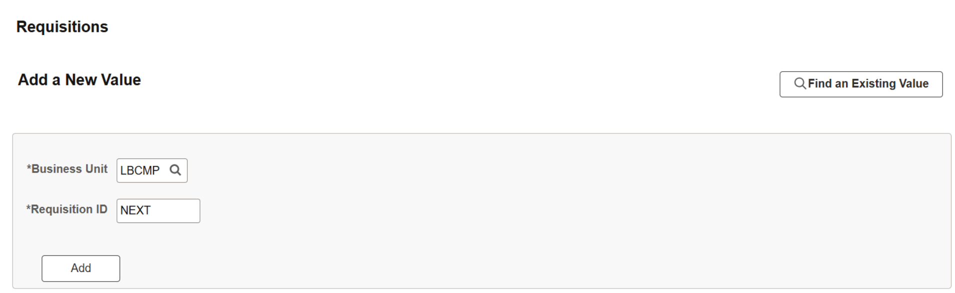
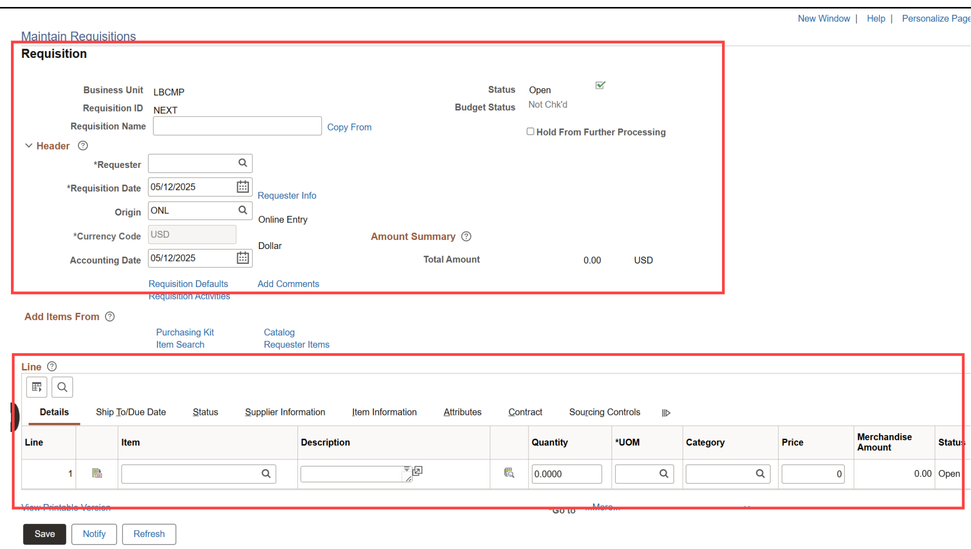
The ***Add/Update Requisition*** process consists of the following steps:

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

2.1 Requisition Entry

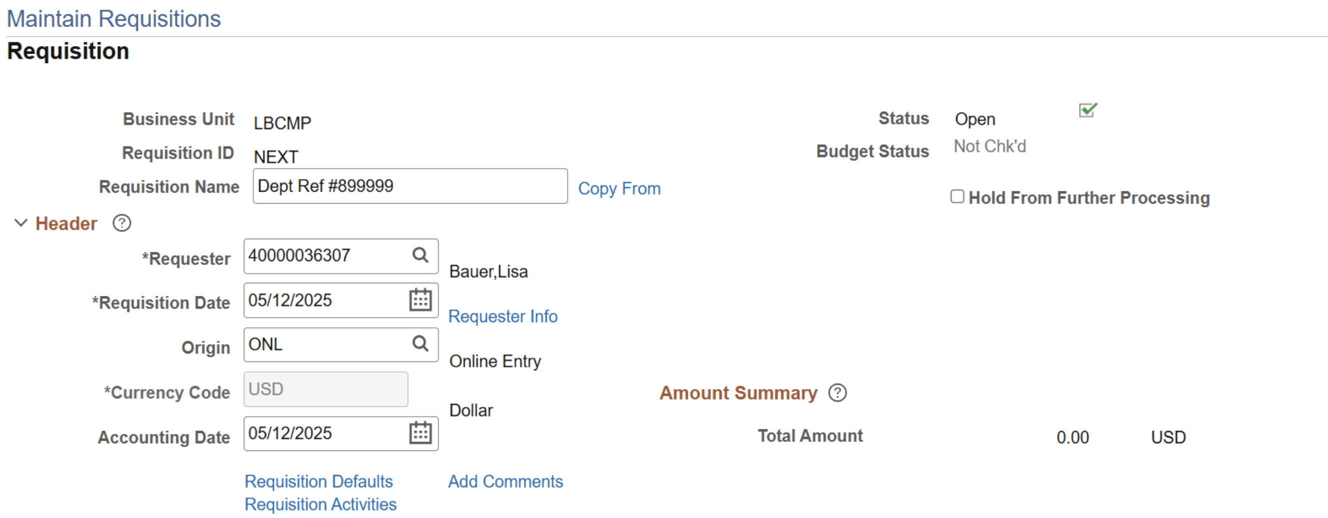
Follow this navigation to access the requisition page:

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

Processing Steps / Field Name	Screenshot / Description
Business Unit: Select LBCMP, LBFDN, or LB49R (Select LFBDN for G, C, and RS funds) Accept the “NEXT” Requisition ID number assigned. The Requisition ID defaults to the next available number when you save the requisition. **Do not change this field.** Select “Add.”	
Requisitions The Requisitions page contains General Information, Header and Line information, and other links.	

Requisition/Header Information

Enter the Requisition Header Information.

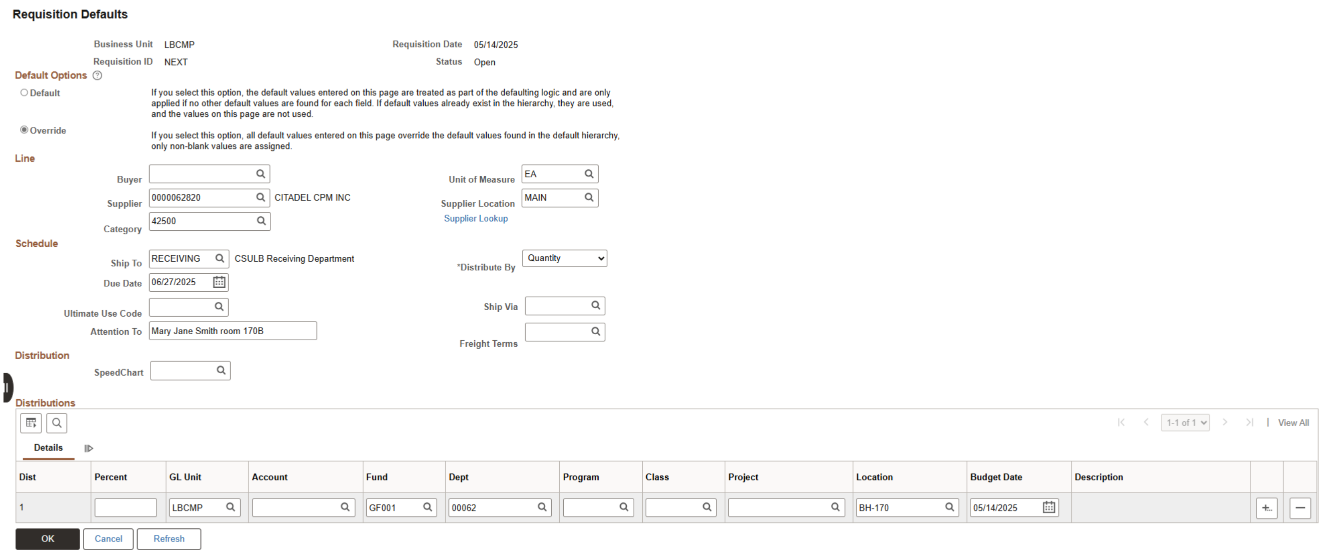


Processing Steps / Field Name	Screenshot / Description
Requisition Name	User Defined. Requesters create a Requisition Name to identify the department's reference number. The Requisition Name carries over to the ***Purchase Order Distribution Lines > Req Detail*** tab. The ability to inquire about this value varies according to the Requisition Inquiry screens.
Status	Displays the requisition status. Defaults to "Open."
Budget Status	Displays the requisition budget checking status and defaults to "Not Chk'd."
Hold From Further Processing	Hold from further processing prevents approval of the requisition and budget checking, allowing the user to continue working on an in-progress requisition.
Requester	Defaults to "End User ID" (campus ID number). Requesters may change this information.
Req Date	Defaults to current date.
Origin	ONL. **DO NOT CHANGE.**
Accounting Date	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.
Requisition Defaults link	See the Requisition Defaults section.
Add Comments link	See the Add Comments 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:



Processing Steps / Field Name	Screenshot / Description
Default Options	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.
Buyer	**DO NOT CHANGE**. Purchasing will assign a buyer to the requisition.
Supplier	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 **Maintain Requisitions Page** (described in the Add/Edit Comments section below).
Category	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, LFBDN and/or LB49R), and are specified as "amount only."
Unit of Measure (UOM)	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. Required.
Ship To	Defaults to "RECEIVING."
Distribute By	Defaults to "Quantity." This value will automatically change when "Amount Only" is selected on the line.

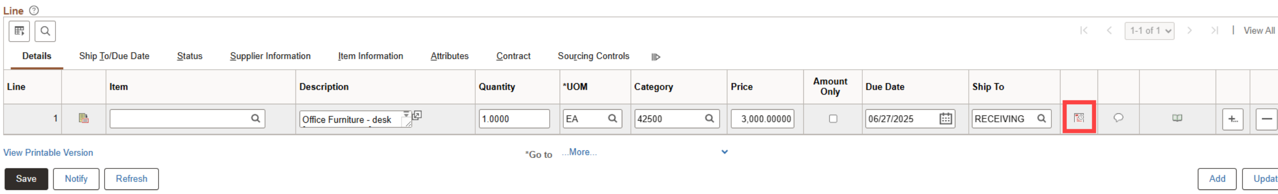
Processing Steps / Field Name	Screenshot / Description
Due Date	Specify the desired date for items to be received. This date may be adjusted by the buyer at the PO level.
Attention To	Specify the person who is the ultimate recipient of the shipment. This field is used in combination with the Location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

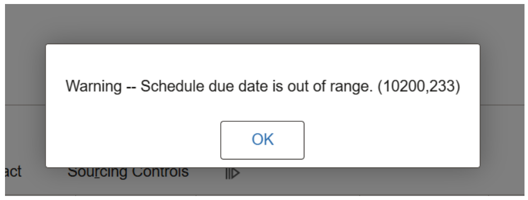
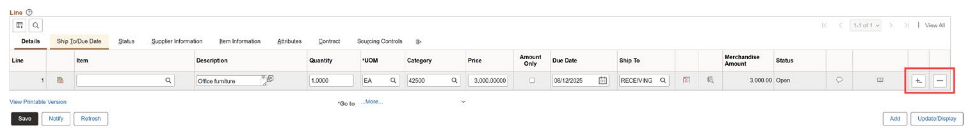
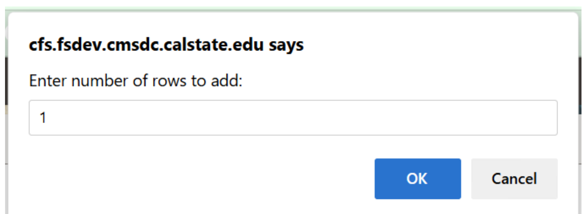
Note: *For Grants, Research Stimulation, or Center funds please use your assigned chartfield string. If you need assistance determining the correct chartfield string, please contact your Grants and Contracts Administrator (GCA).*

Line Info

Enter the Requisition Line Information.



Processing Steps / Field Name	Screenshot / Description
Description	Enter the description of the Good(s) or Service(s) you are requesting. Note: The Line Description should include the following (if applicable): • [BRIEF DESCRIPTION]: Define the item from the broadest to the more detailed – 18 characters • [PART NUMBER]: Begin entering part number or continue brief description if part number is not applicable – 10 characters • [DETAILED DESCRIPTION]: Use detailed description to clearly define the purchase Use the icon to the left of the description field to view "Line Details." Note: If you populated the "Requisition Defaults" page, select "Refresh" to auto-fill applicable fields.
Quantity	Quantity of the good(s) you want to purchase.
UOM	Unit of Measure.
Category	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. Category codes beginning with 0-8 typically are goods which are quantity based and therefore 3-way match (LBCMP, LBFDN and LB49R). 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 specified as amount only.
Price	Price per unit of measure.
Amount Only	Always select "Amount Only" when entering a service-based requisition. Quantity based requisitions will not have this option selected. 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."
Due Date	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. 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

<table>
<tr><th>Processing Steps / Field Name</th><th>Screenshot / Description</th></tr>
<tr><td></td><td>is greater than 30 days from the Requisition Date, you will receive a warning message. Once validated, select OK.

</td></tr>
<tr><td>Ship To Location</td><td>DO NOT CHANGE. Defaults to RECEIVING.</td></tr>
<tr><td>Schedule Icon</td><td>Select the Schedule Icon  to navigate to the Schedule page.</td></tr>
<tr><td>Add/Delete Row
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.</td><td>
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”.

</td></tr>
</table>

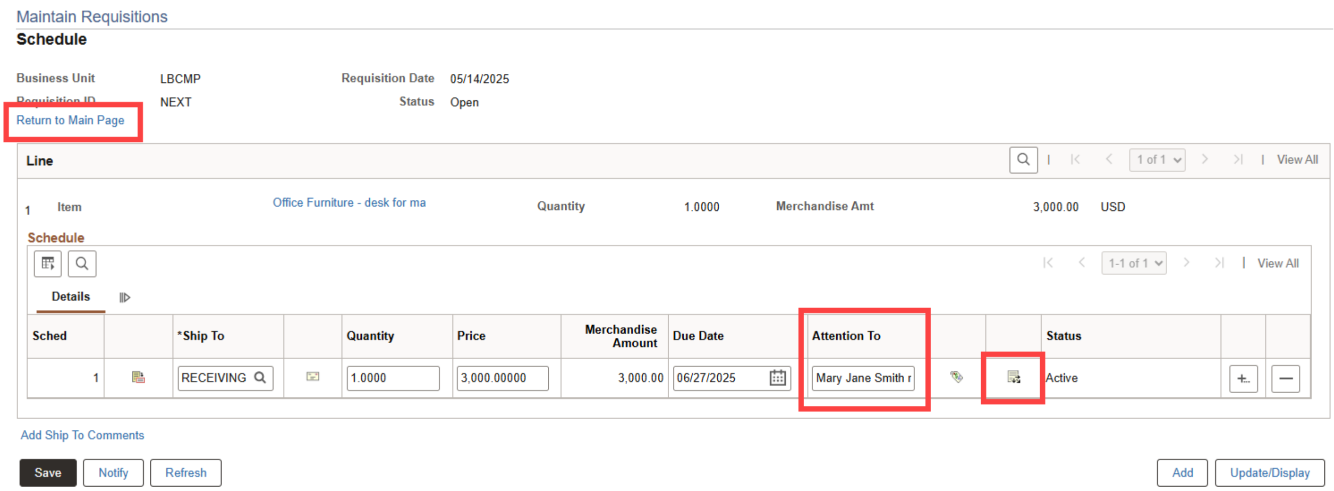
Schedule Info

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:

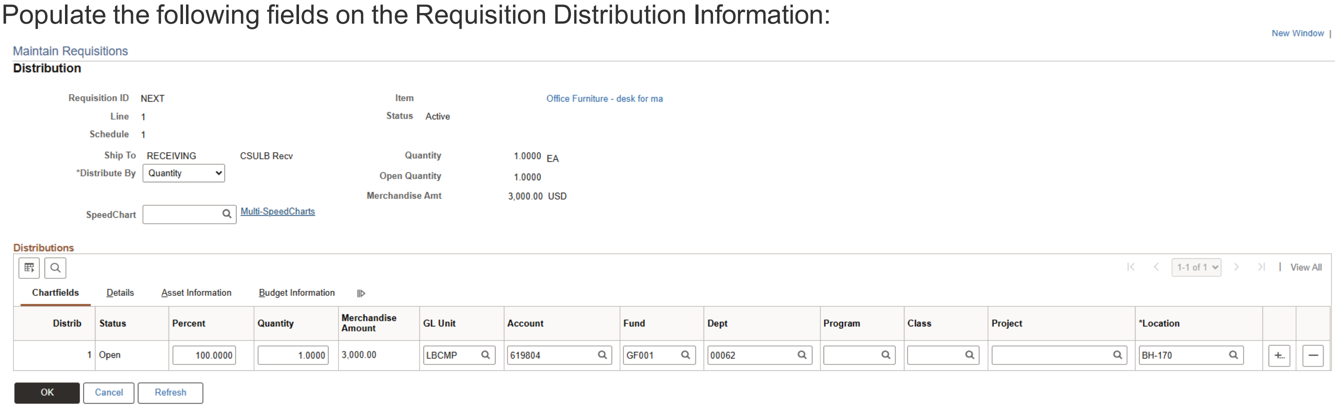


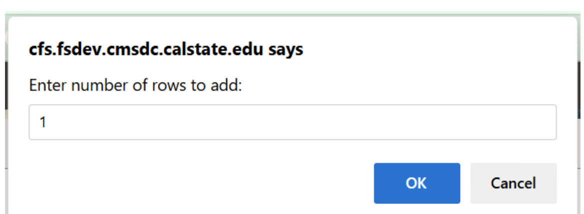
Processing Steps / Field Name	Screenshot / Description
Return to Main Page	This link takes you back to the Main Page of the requisition.
Attention To	This is used in conjunction with the Location. Specify the person to whom the goods should get delivered to. The Requester Name will default in this field. Override if necessary.
Distribution Icon	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:

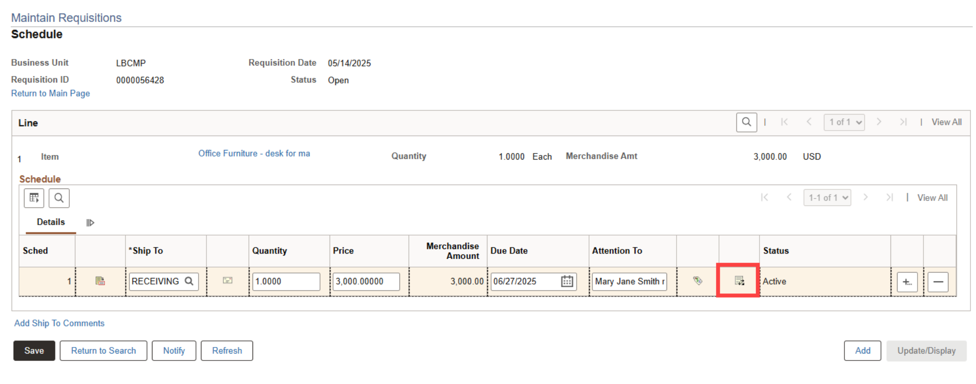
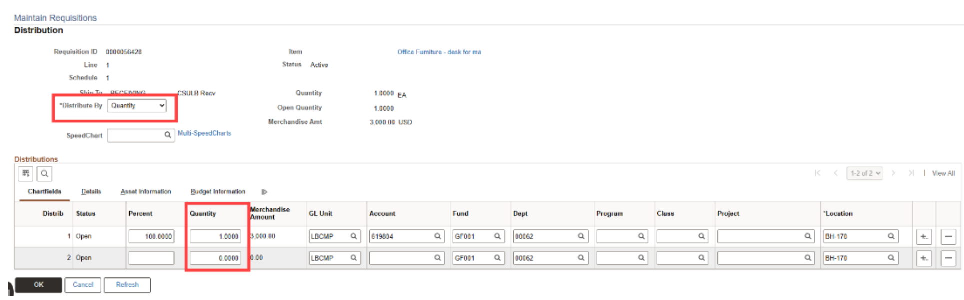
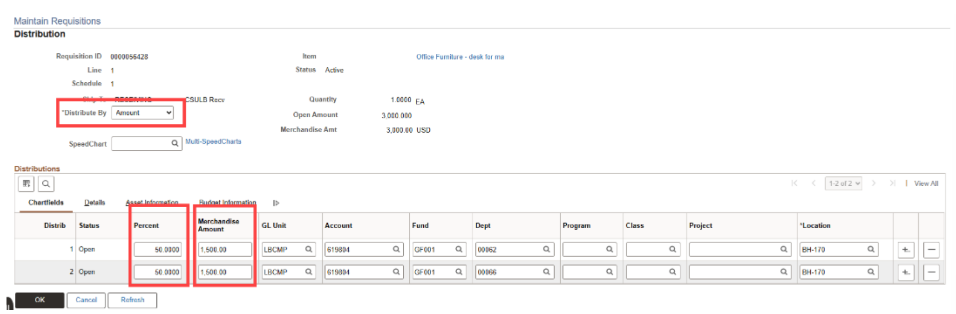


Processing Steps / Field Name	Screenshot / Description
GL Unit	This will default to the user default business unit (LBCMP, LBFDN, LB49R). User will need to change when necessary. Select LBFDN for G, C, and RS funds.
Account	**DO NOT CHANGE.** Defaults from the Category Code specified on the Req Line or Req Line Defaults.
Fund	Enter the Fund number to charge. Required.
Dept	Enter the Department number to charge. May default from the requester settings. Required.
Program	Enter the Program code to charge.
Class	Enter the Class code to charge.
Project	Enter the Project code to charge. Required for G funds only.
Add/Delete Row 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.	 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.
Select the **Save** 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.

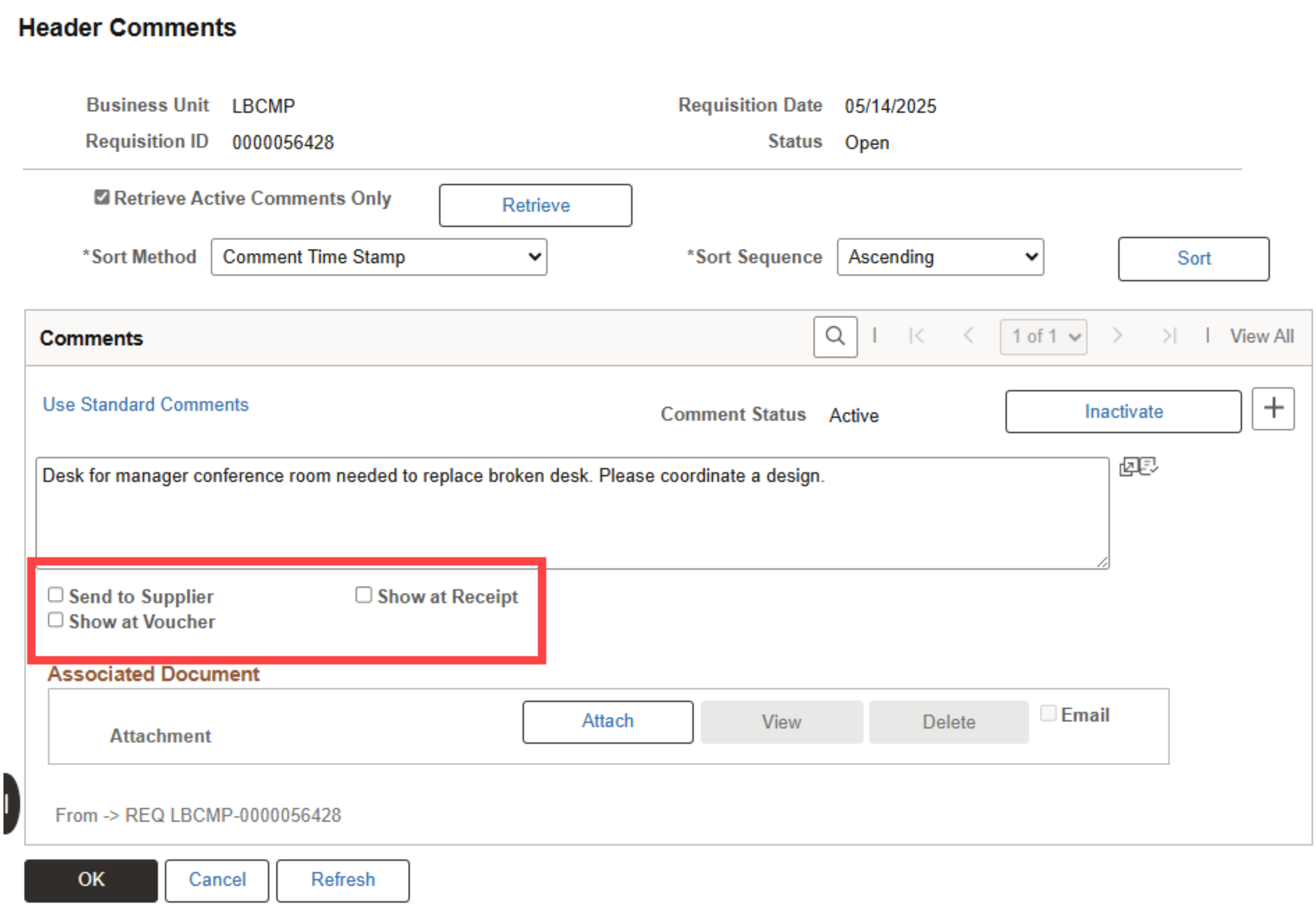
Processing Steps / Field Name	Screenshot / Description
From the Main Page, select the Schedule Icon to navigate to the Schedule page. Then, select the Distribution Icon to navigate to the *Distribution* page.	
From the *Distribution* page (Reduce the quantity and select the "+" to insert another distribution line. The remaining quantity will populate the quantity field in the added line. Change the distribution accordingly. To split the distribution by dollar amount, use the drop down to change the **Distribute by** from Quantity to Amount and enter the dollar amounts. Modify the Fund, Dept, and other fields as necessary. Click the **OK** button to return to the Schedule page, then **Save**; then click the link to *Return to Main Page*.	 

Add/Edit Comments

Select the "Add Comments" link to add notes/comments for Purchasing, Receiving, Accounts Payable, and/or the Vendor OR to add attachments to the requisition such as a quote or vendor 204 Form. Select "OK" once your header comments are complete. Note that after entering comments, the "Add Comments" link will change to "Edit Comments."

Enter the Comment Information.

***Note**: For Grants, Research Stimulation, or Center funds please provide a brief justification/explanation for the requested good or service in the Comments field.*



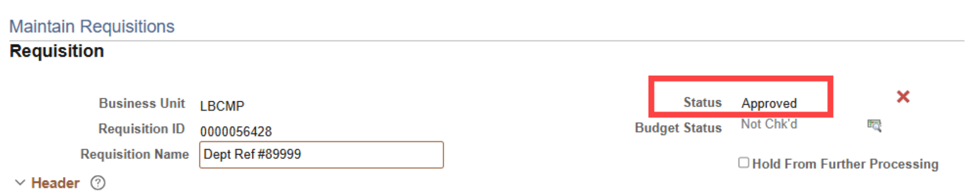
Processing Steps / Field Name	Screenshot / Description
Comments	Use this field to communicate with the various areas. Add notes/comments for Purchasing, Receiving (select "Show at Receipt"), Accounts Payable (select "Show at Voucher") and/or the Supplier/Vendor (select "Send to Supplier").
Send to Supplier	This is a comment intended for the Supplier. It will print at the bottom of the requisition and, after vetted by the buyer, on the printed purchase order.
Show at Voucher	This is a comment intended for Accounts Payable and will be visible to A/P techs when they are processing the voucher.
Show at Receipt	This is a comment intended for the Receiving department and will be visible to the person receiving the goods in PeopleSoft.

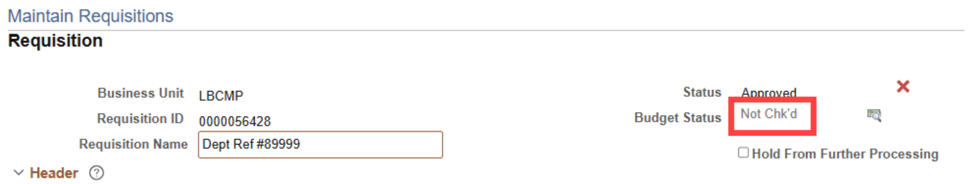
Processing Steps / Field Name	Screenshot / Description
Associated Document	Use this section to add the required attachments to process the requisition (such as a quote, contract, VPAT/E & IT checklist, or Vendor 204 form). If the “Email” checkbox is selected, the vendor will receive a copy of the attachment along with the dispatched Purchase Order if the PO is email dispatched. If the purchase is to be split with another department, the Delegation of Authority for both departments must be included. Attach a pdf of an email with appropriate DOA approvals. Note: Only one attachment can be made per header comment. If an additional attachment is necessary, use the “+” to add a new header comment. Use the browse button to upload the file and then the View button to validate the attachment uploaded correctly. If the file name includes parenthesis and/or brackets errors will occur.

2.2 Approval and Budget Checking

The next steps to processing a requisition are to Approve and then Budget Check the requisition. This applies if the requester has authorization to approve. Then the requisition will be budget checked during the regularly scheduled nightly process. If a person is solely an Approver and wants to review all of the Chartfields, they can follow the steps in the Requisition Approval (for non-requestors) section.

***Note**: The assigned Grants & Contracts Administrator (GCA) will approve Grants, Research Stimulation, or Center funds.*

Processing Steps / Field Name	Screenshot / Description
Requisition page Once you have saved the requisition, it is now ready to be processed. If you put the requisition on Hold, Remove the Hold From Further Processing by unchecking it. Next, you want to Approve and Budget Check the requisition.	
Select the Approval icon. The Status will change from “Open” to “Approve” after the Req is approved.	Approval Icon -  

The budget check icon will appear following the requisition approval. The Budget Check process occurs during a nightly scheduled process, after which the Budget Status will change from “Not Chk’d” to “Valid.”	Budget Check Icon -  

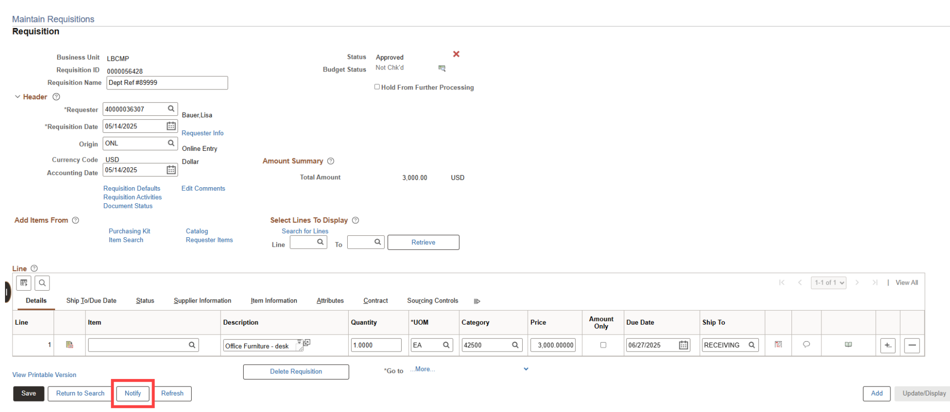
Important Notes:

- 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

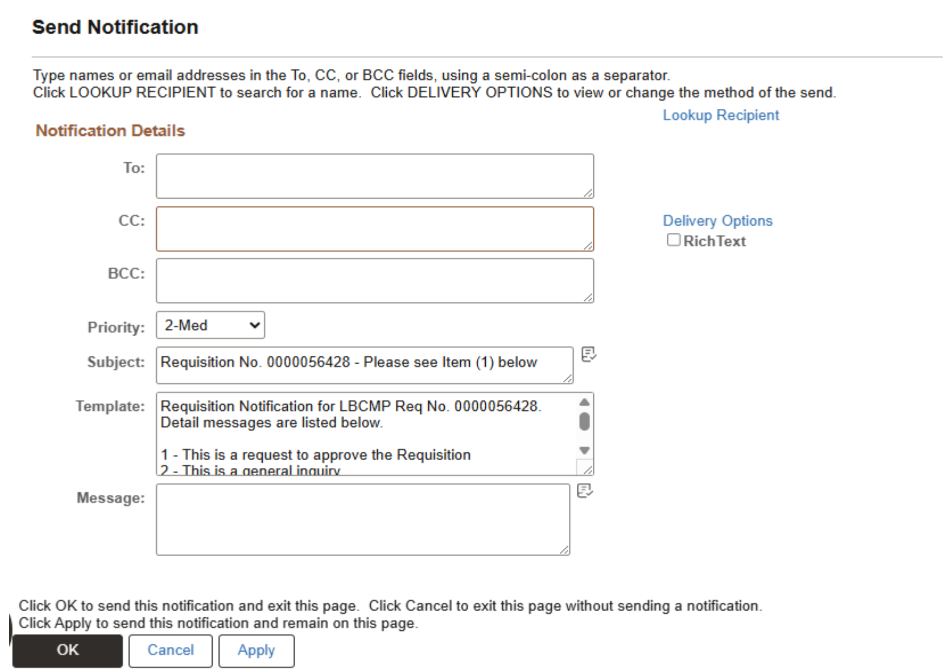
Use the “Notify” button to generate and send a system message to another person, such as the approver or a buyer. Consider including your own email address in the cc or bcc field so you have a copy of the email for your records.

***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
From the Requisition Main Page, select the **Notify** Button.	

The Send Notification Page will display.

Enter the Information.



Processing Steps / Field Name	Screenshot / Description
To	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>
CC	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>
BCC	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.
Priority	Select the priority of the message. Defaults to "2-Med".
Subject	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).
Template	Non-editable field.
Message	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)

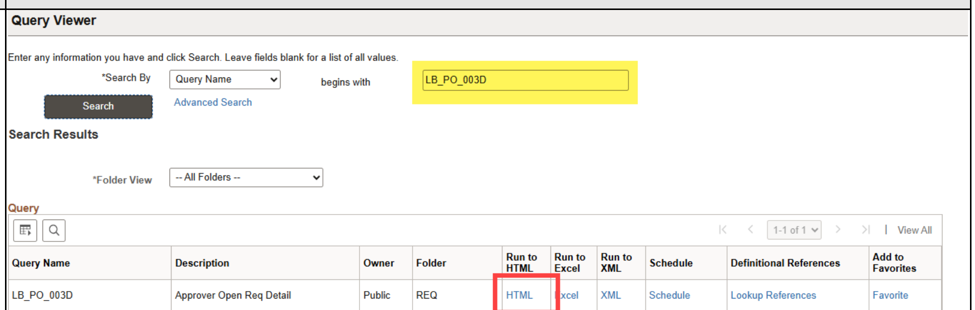
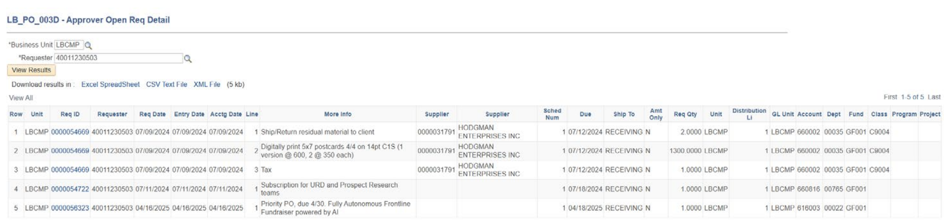
If the Requestor does not have approval authority for requisitions, the next step is to get the authorized approver to Approve and Budget Check the requisition.

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.

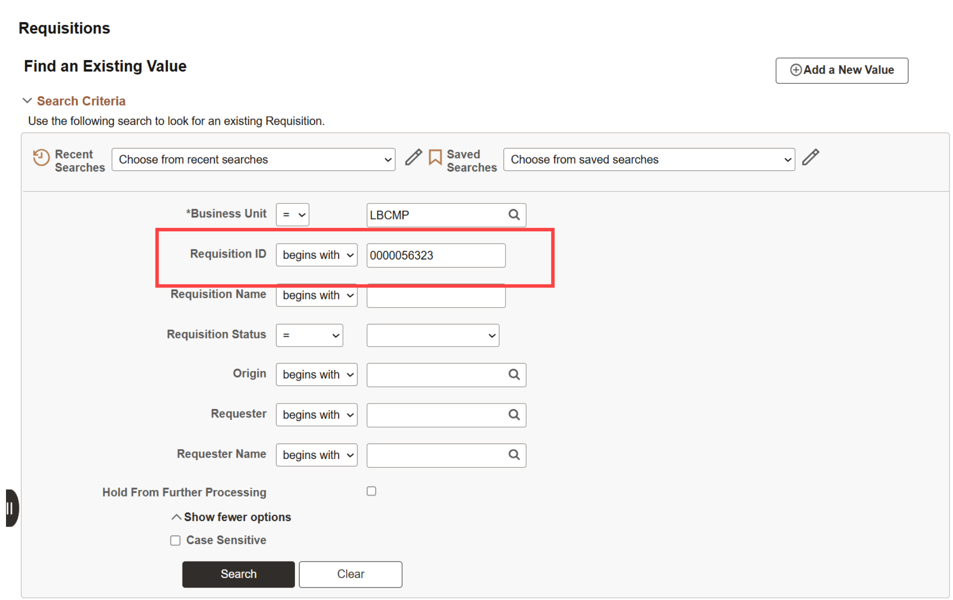
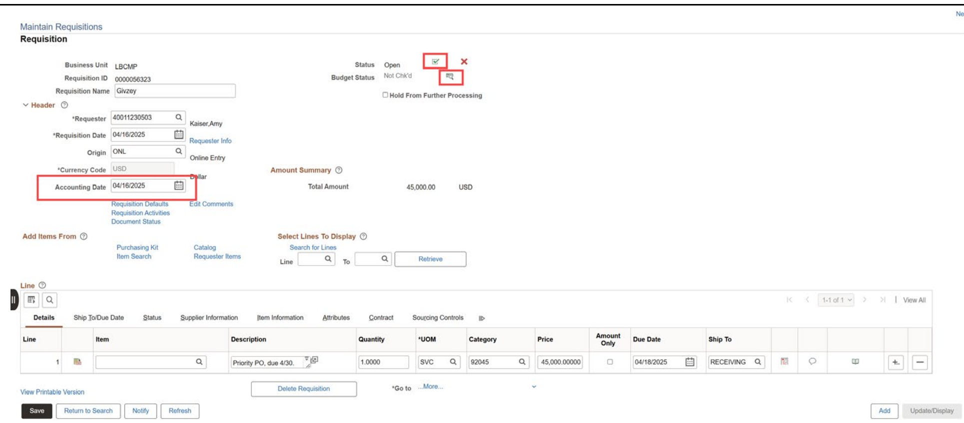
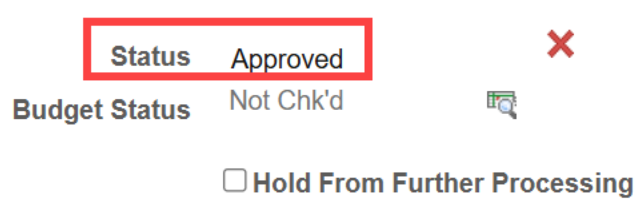
Review the Requisition Lines and Distribution

Navigation: Purchasing > Query > Query Viewer

Processing Steps / Field Name	Screenshot / Description
In the Search By field/box, select Query Name LB_PO_003D. Select "**Search**". Select "**HTML**" on the right of the table to run the query to a new window. Select the appropriate Business Unit: LBCMP, LBFDN, or LB49R. 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. Select the "**View Results**" button. 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.	 

Search for the Requisition to Approve

Navigation: Purchasing > Requisition > Add/Update Requisitions

Processing Steps / Field Name	Screenshot / Description
Select the tab labeled "**Find an Existing Value**". In the Requisition ID field/box, type in the entire "**Requisition ID**" Select "**Search**". Select the appropriate requisition by clicking on it.	
Verify the accounting date is within the same month as requisition approval date. If not, change the accounting date to the current date. Select the green checkmark to Approve the requisition. 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. Select "**Save**".	

4.0 Requisition Deletions

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

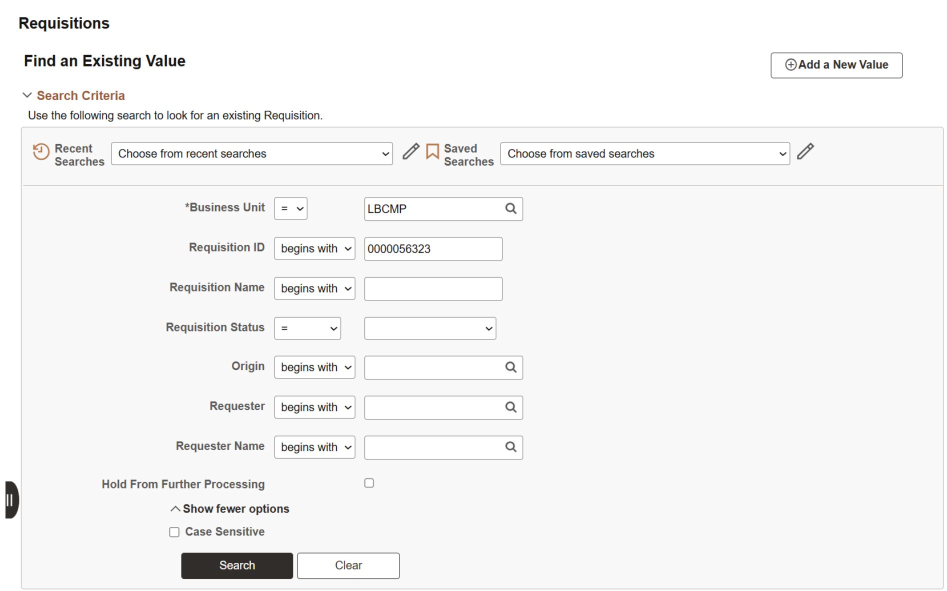
4.1 Deleting the Entire Requisition

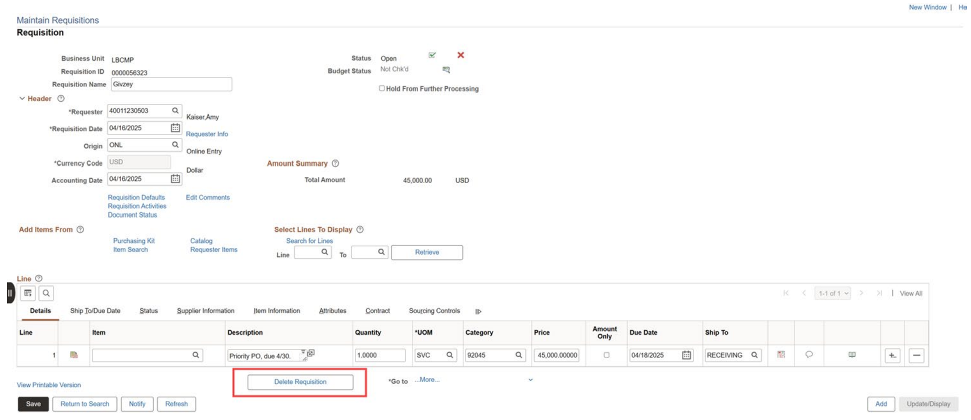
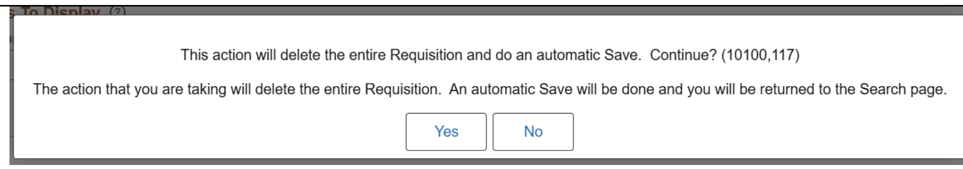
You can delete an entire requisition by selecting the Requisition Delete icon on the Requisitions page. To delete an entire requisition, the requisition must meet the following criteria:

- 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**
The first step is to call up the requisition you want to Delete. Select the "Find an Existing Value" tab. Enter in the Requisition Number or the Requester. Select the Search button.	

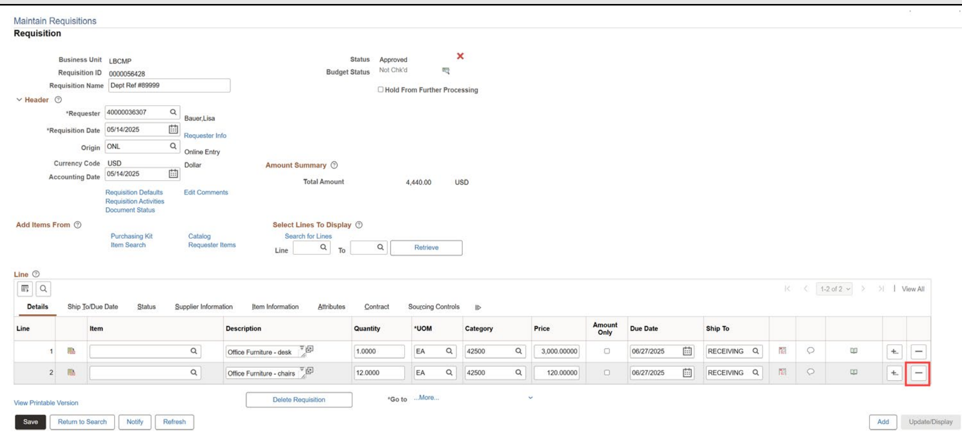
If the Requisition is available to be deleted the “Delete Requisition” button will be available to select. **Note:** If you are in the process of creating a Requisition, and have not navigated from the page, you must exit and then return to access the “Delete Requisition” button on the requisition.	
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
To delete a Requisition Line, Schedule, or Distribution, select the appropriate section and then the “-” next to the row you want to delete.	

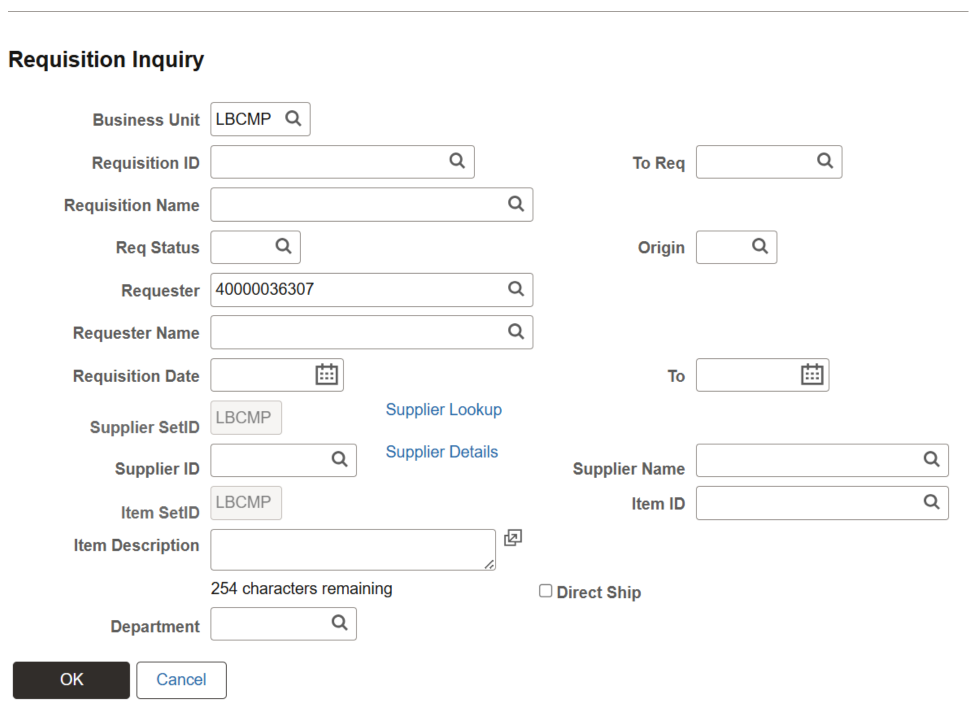
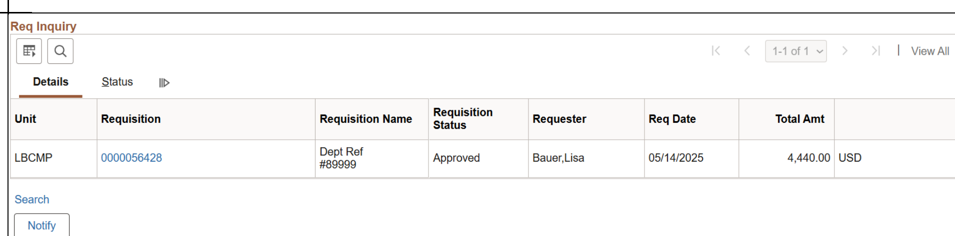
Note: You may not edit a Requisition after it has been Approved, Budget checked and Sourced to a Purchase Order. Submit a change request using the **“Notify”** button on the purchase order to update approved requisitions.

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
Enter criteria for selecting requisitions to view on the Requisitions Inquiry page. (Use as few or as many of the criteria fields as desired). Select “OK”. Requisitions meeting the criteria are displayed. **Note:** For the Requester field, use “40” + 9-digit employee ID	
Click the Requisition link to open the requisition you with to view.	

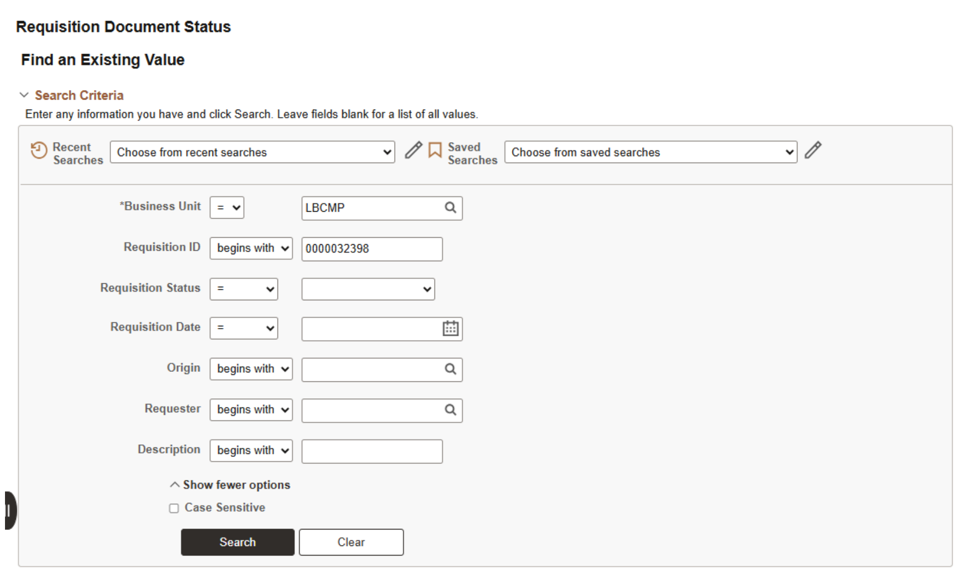
Field Name	Description
Requisition	Select the Requisition you wish to view. You will be able to drill down to the Line, Schedule and Distribution details.
On PO (on purchase order)	Select the link Y or P values to access the Requisition to Purchase Order List page. *Y* (yes) - All lines appear on purchase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

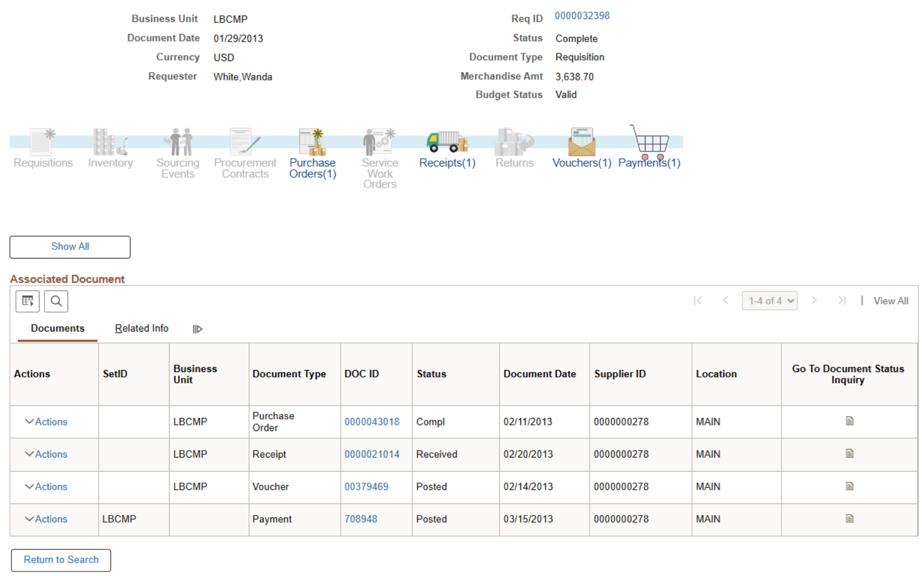
Use the inquiry to determine whether a Requisition has been sourced into a Purchase Order, is associated with a contract; or has been Received, Vouchered, or Paid. This inquiry displays all associated documents - the Purchase Order, Voucher/Supplier Invoice, Payment, and Receipt of items.

Navigation: Purchasing > Requisitions > Requisition Document Status

Processing Steps / Field Name	Screenshot / Description
Enter criteria for selecting requisitions to view on the Document Status page. Select "**Search**". Requisitions meeting the criteria will be displayed.	

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.



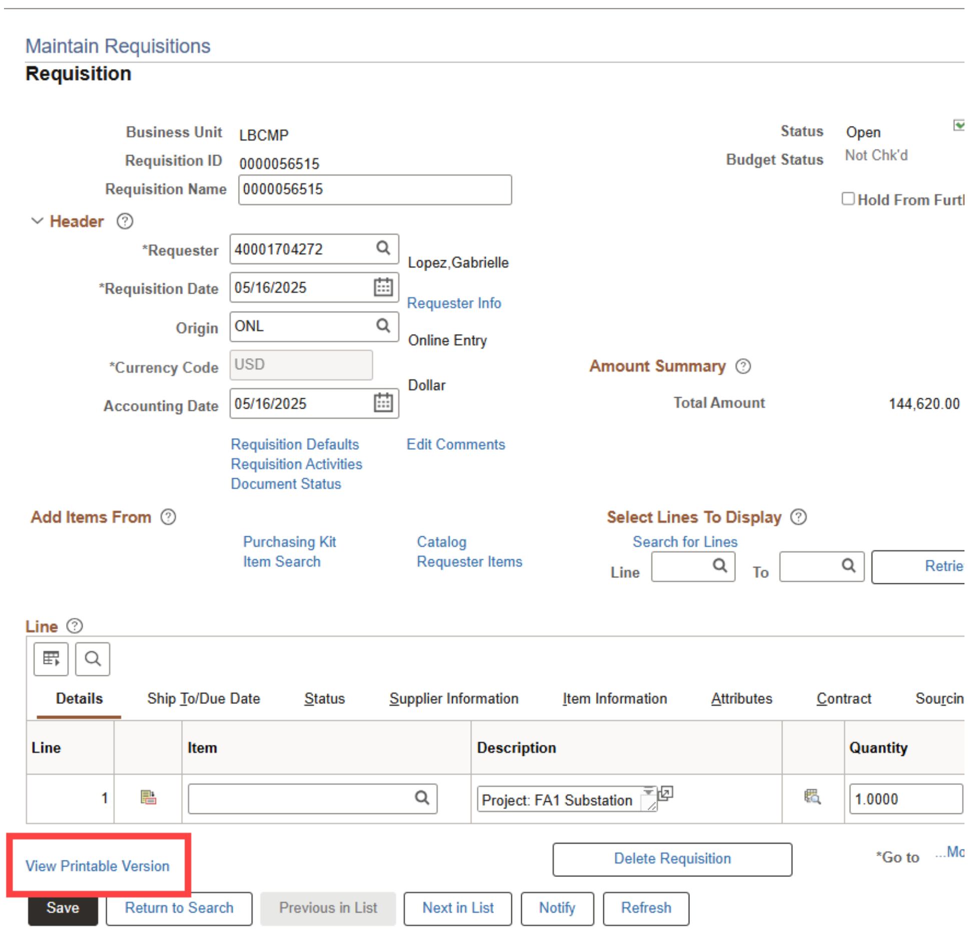
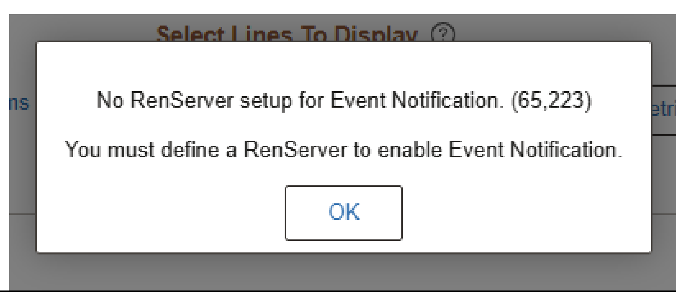
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
Actions		LBCMP	Purchase Order	0000043018	Compl	02/11/2013	0000000278	MAIN	
Actions		LBCMP	Receipt	0000021014	Received	02/20/2013	0000000278	MAIN	
Actions		LBCMP	Voucher	00379469	Posted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

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.

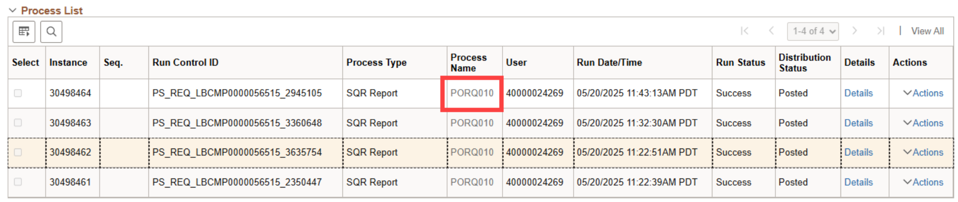
6.1 Printing a Requisition from the Add/Update page

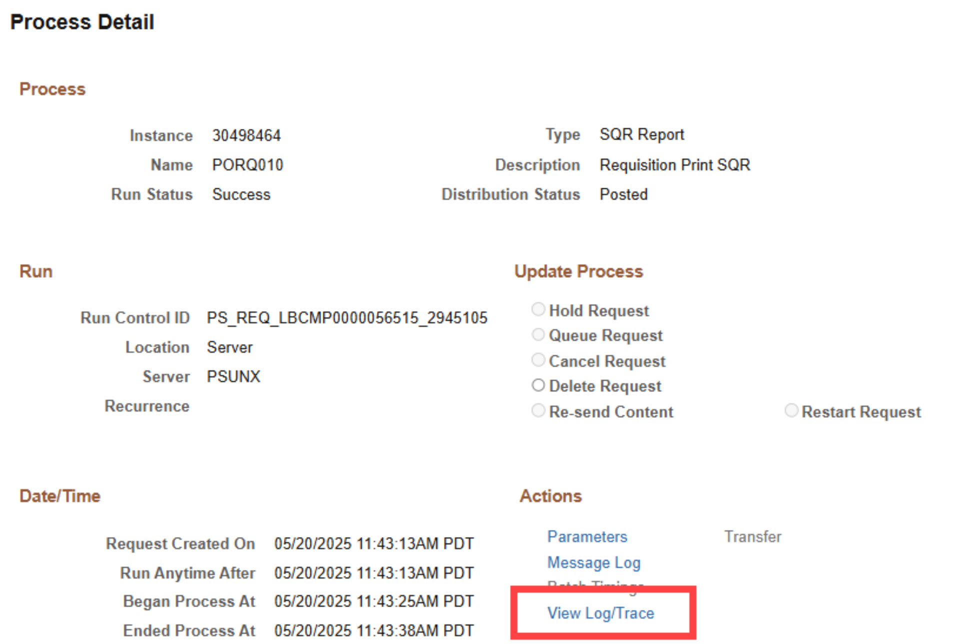
Navigation: Purchasing > Requisitions > Add/Update Requisitions > Find an Existing Value

Processing Steps / Field Name	Screenshot / Description
1. Select **"View Printable Version"** 2. An error message may appear. If so, select **"OK"** to acknowledge the warning. Note: Despite the warning, your job has already gone to print and just needs to be picked up from Process Monitor. 3. Proceed to the Process Monitor using the navigation below	

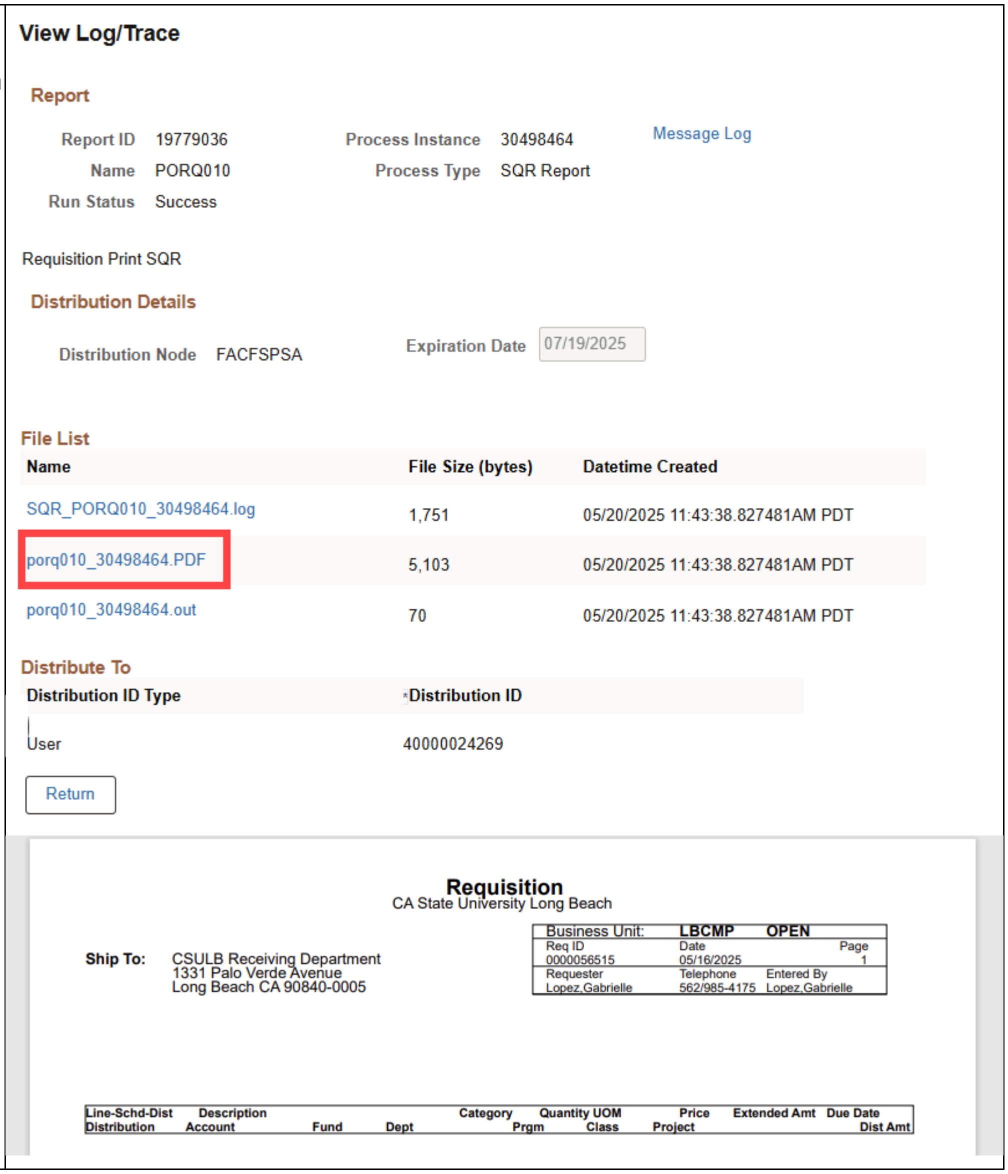
6.2 Opening Process Monitor

Navigation: PeopleTools > Process Scheduler > Process monitor

<table>
<tr><th>Processing Steps / Field Name</th><th>Screenshot / Description</th></tr>
<tr><td>5. Look for the process name “PORQ010”
6. Select Details</td><td>


</td></tr>
<tr><td>7. Select View Log/Trace</td><td>


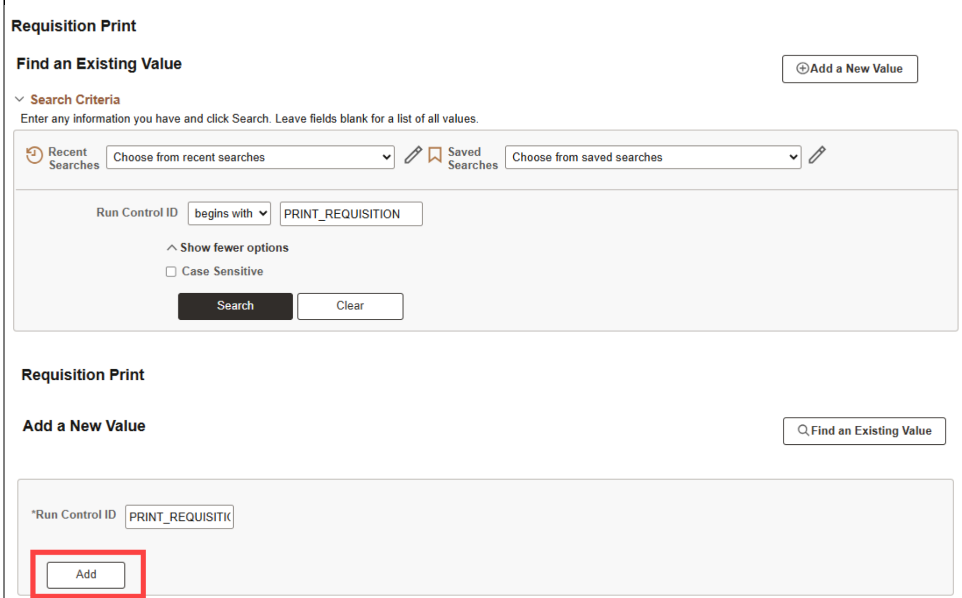
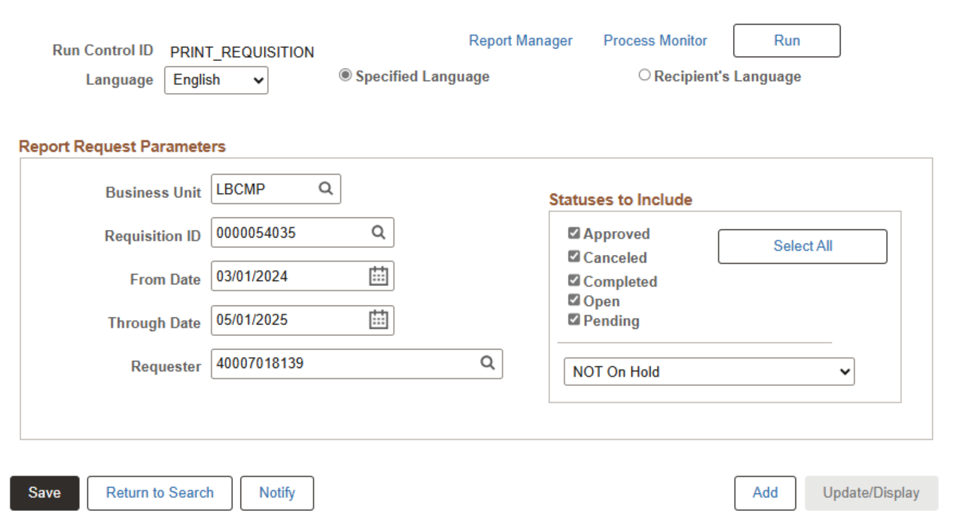
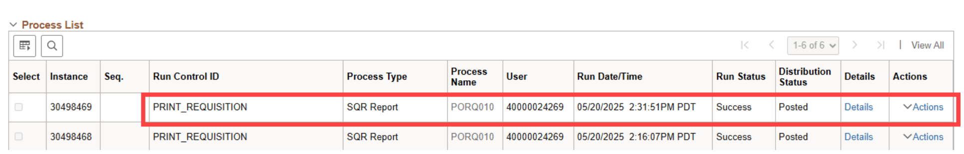
</td></tr>
</table>

8. Select the **PDF** file. The **PDF** document will open in another tab and is ready to print.	

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
1. Enter the **PRINT_REQUISITION** run control ID. 2. Select **Search**. If there are no results, select **Add** to add a new value.	
Select: 3. Business Unit 4. Requisition ID 5. Other statuses, as needed. Select "**Save**" Select "**Run**"	
6. Navigate to the **Process Monitor** to retrieve the job.	

Report Example:

Requisition

CA State University Long Beach

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

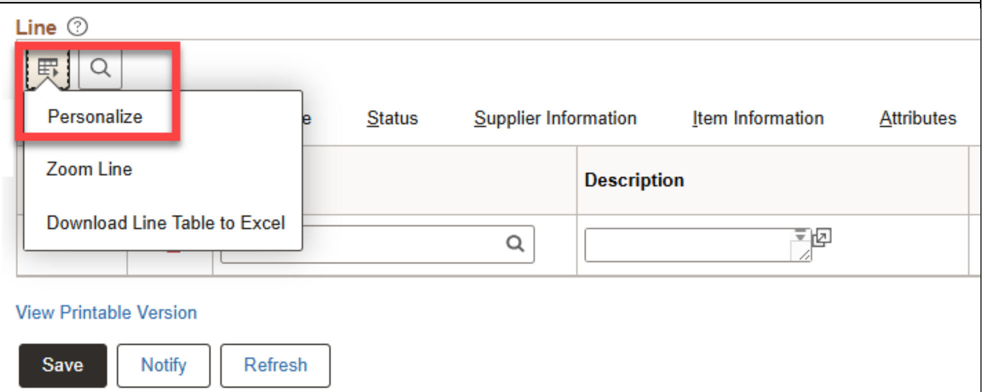
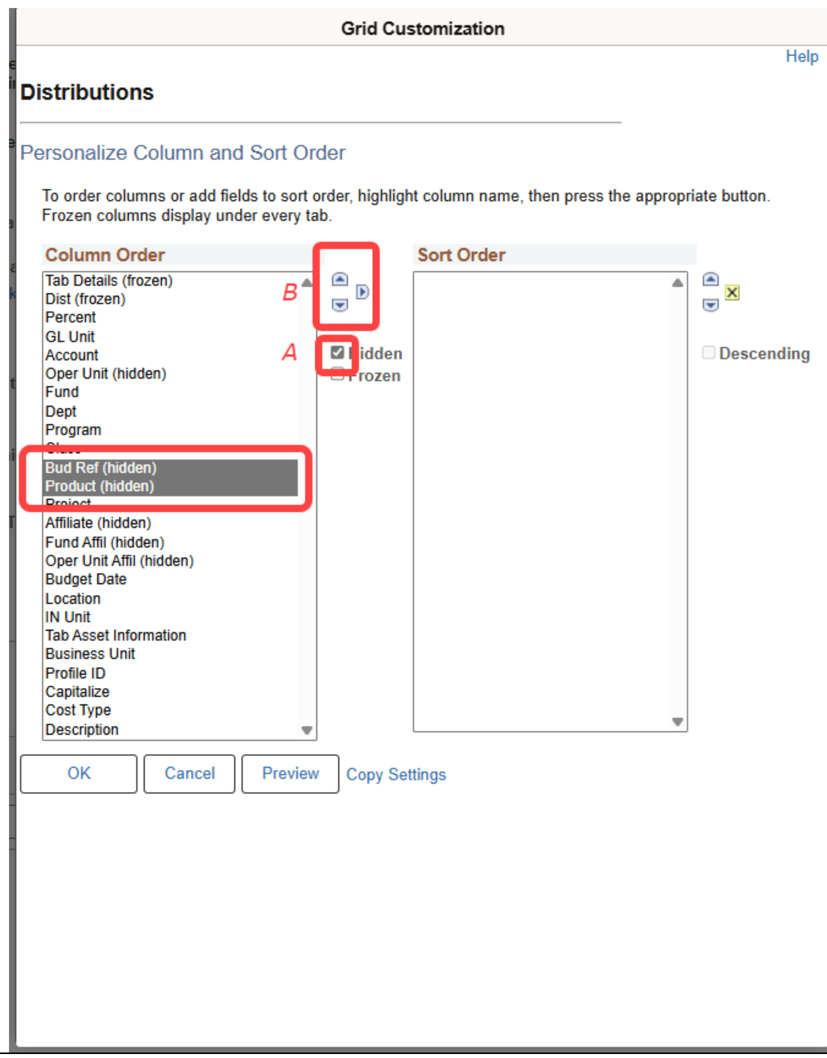
Business Unit:	**LBCMP**	**COMPLETE**
Req ID 0000054034	Date 05/08/2024	Page 1
Requester Followell,Shauna	Telephone 562/985-4128	Entered By Followell,Shauna

Line-Schd-Dist Distribution	Description Account	Fund	Dept	Category	Quantity Prgm	UOM Class	Price Project	Extended Amt	Due Date 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
					Line Total:			3,742.50	
					Total Requisition Amount:			3,742.50	

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

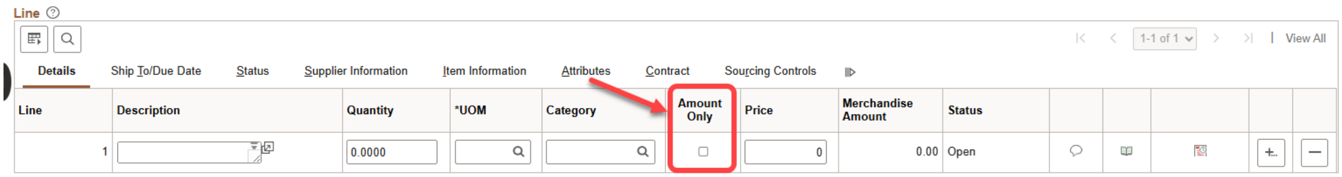
7.0 Personalize

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
1. To personalize, select the “Personalize” link. 2. 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. 3. Select OK to save changes and close the window. 4. You may also choose to reorder fields. If so, use the up or down arrows until the field is in the desired location.	 

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):



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