

CFS REQUISITION PROCESS GUIDE

CFS Requisition Process Guide

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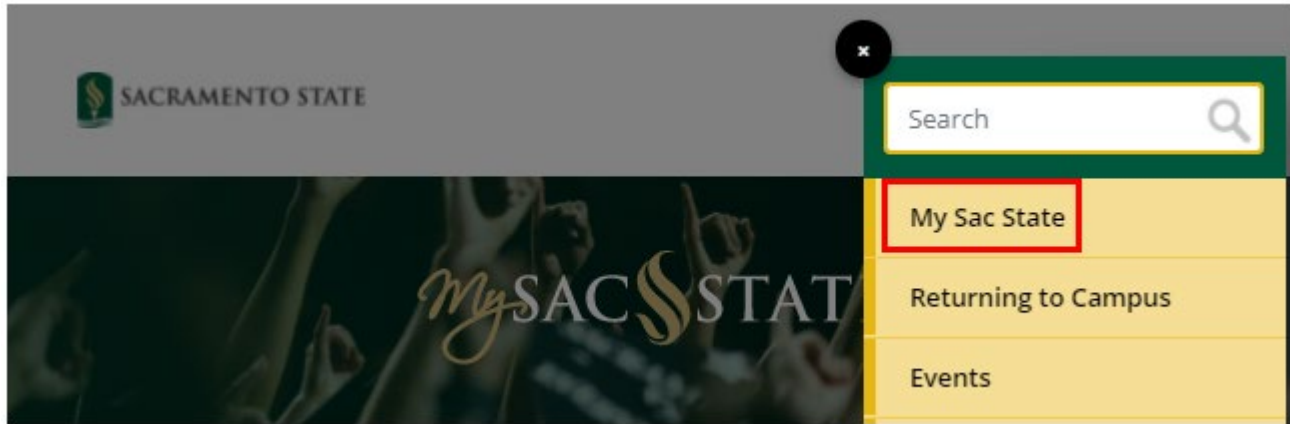
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Section 1.0 Creating a Purchase Requisition

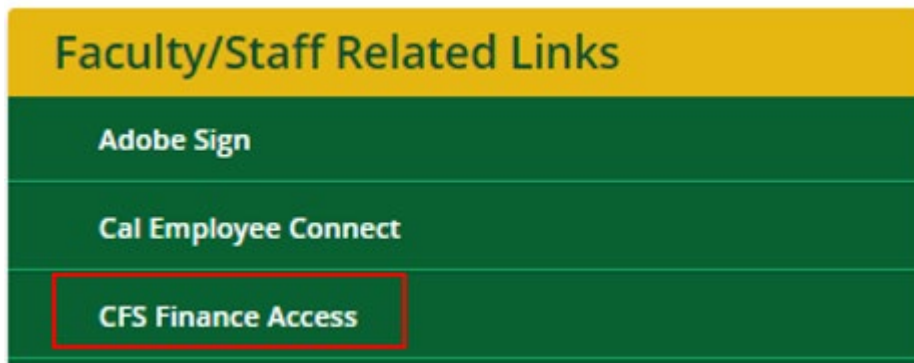
When creating a requisition with multiple lines using the same Chartstring information, it is best to enter Requisitions using the requisition defaults. Setting the defaults before entering each line will save time and reduce errors.

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

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



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




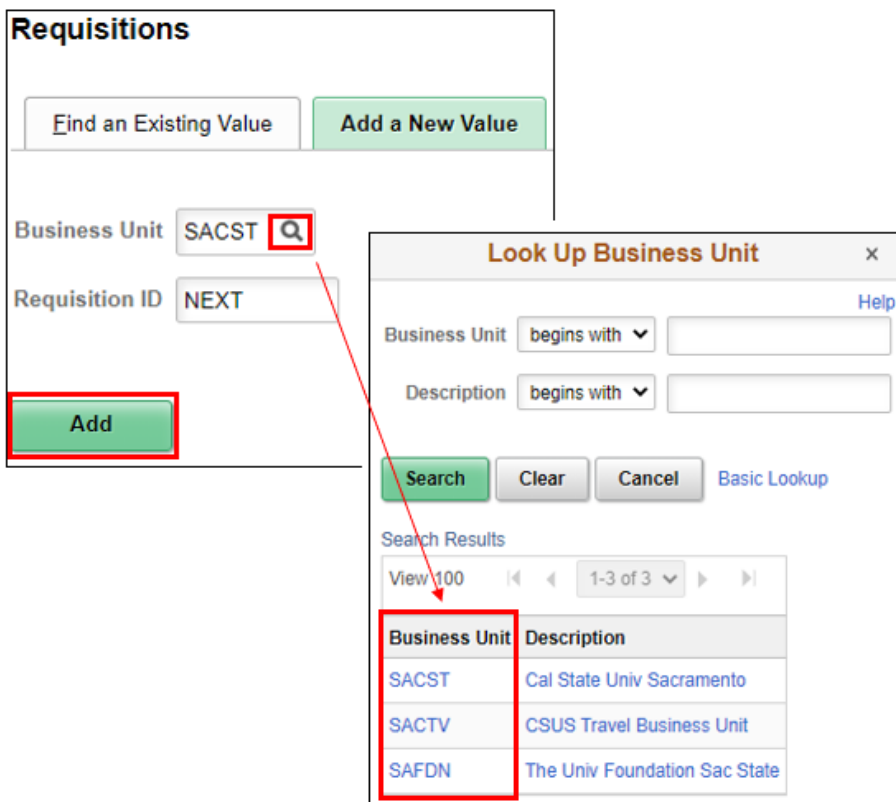
3. The Oracle menu page will display. Click on the diamond-shaped NavBar icon at the top right of the homepage.
4. Follow the following path. Navigator>Purchasing>Requisitions>Add/Update Requisitions



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

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



The Requisition Header information will be automatically populated.

Maintain Requisitions


Requisition


Business Unit SACST Status Open


Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing


▼ Header ?

*Requester 60102088127 

*Requisition Date 08/11/2021  Requester Info

Origin ONL  On-Line Entry

*Currency Code USD Dollar Amount Summary ?

Accounting Date 08/11/2021  Total Amount 0.00 USD

Requisition Defaults Add Comments


Requisition Activities

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Line ?



Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls ||>

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

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

Field Definitions below:

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

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6. Click **Requisition Defaults** to view or modify the settings

▼ Header ?

*Requester [input] 🔍

*Requisition Date 08/11/2021 📅 [Requester Info](#)

Origin ONL 🔍 [On-Line Entry](#)

*Currency Code USD [Dollar](#)

Accounting Date 08/11/2021 📅

Requisition Defaults [Add Comments](#)

[Requisition Activities](#)

7. Review the Requisition Defaults and make modifications as needed

Requisition Defaults

Business Unit SACST Requisition Date 08/11/2021
 Requisition ID NEXT Status Open

Default Options ?

Default
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer [input] 🔍 Unit of Measure [input] 🔍

Supplier [input] 🔍 Supplier Location [input] 🔍
[Supplier Lookup](#)

Category [input] 🔍

Schedule

Ship To [input] 🔍 *Distribute By Quantity ▼

Due Date [input] 📅 *Liquidate By Amount ▼

Ultimate Use Code [input] 🔍 Ship Via [input] 🔍

Attention To [input]

Freight Terms [input] 🔍

Distribution

SpeedChart [input]

Distributions

☰ 🔍

Details Asset Information ||>

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

OK Cancel Refresh

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

Field Definitions Below:

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

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

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

Dist	Percent	GL Unit	Account
1		SACST	660003

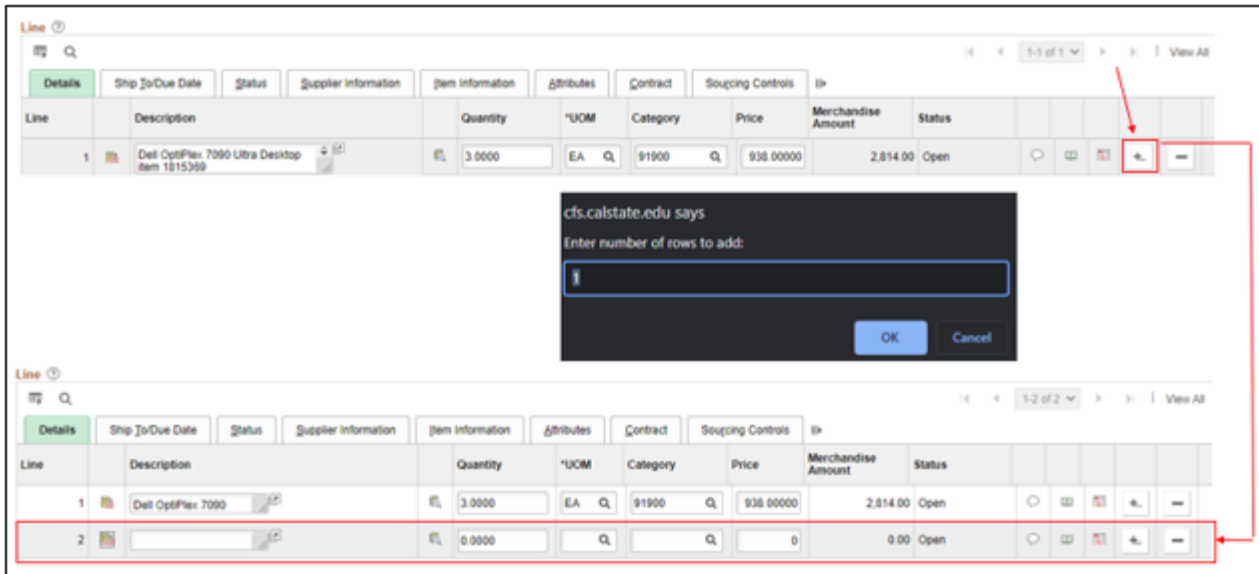
Section 1.1 Requisition Line Details

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Dell OptiPlex 7090 Ultra Desktop Item: 1815369	3.0000	EA	91900	938.0000	2,814.00	Open

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


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

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

Field Definitions below:

Field	Description
Description	Enter the description of the product or service. If you need to add more information than this field will accommodate, use the Line Comments  icon
Quantity	Enter the quantity of the product. If it is a service, enter "1"
UOM	Enter the Unit of Measure . Select EA for all commodities (57800) or DLR (96200) for all services. EA/DLR (91900) Information & Communications Technology
Category	Enter 57800 for miscellaneous commodities or 96200 for miscellaneous services or 91900 Accessible Technology Initiative
Price (No zero-dollar entries)	Enter the Price

Section 1.2 Modify the chartfield for the Line Item

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

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

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

Requisition

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

▼ Header ⓘ

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

Amount Summary ⓘ

Total Amount	2,814.00	USD
--------------	----------	-----

Requisition Defaults Add Comments
 Requisition Activities

Add Items From ⓘ

Purchasing Kit Catalog
 Item Search Requester Items

Line ⓘ

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Dell OptiPlex 7090 Ultra Desktop Item: 1815389	3.0000	EA	91900	938.00000	2,814.00	Open

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

Schedule

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

Line ⓘ

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

Schedule

Details ⓘ

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

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

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

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Distribution

Requisition ID: NEXT
 Line: 1
 Schedule: 1
 Ship To: CENT REC
 Cent Rec
 *Distribute By: Quantity
 *Liquidate By: Amount
 SpeedChart: Multi-SpeedCharts

Item: Dell OptPlex 7090 Ultra Desk
 Status: Active
 Quantity: 3.0000 EA
 Open Quantity: 3.0000
 Merchandise Amt: 2,814.00 USD

Distributions

Chartfields: Details, Asset Information, Budget Information

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

OK Cancel Refresh

Rules for CFS:

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

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

Distribution

Requisition ID: NEXT
 Line: 1
 Schedule: 1
 Ship To: CENT REC
 Cent Rec
 *Distribute By: Quantity
 *Liquidate By: Amount
 SpeedChart: Multi-SpeedCharts

Item: Dell OptPlex 7090 Ultra Desk
 Status: Active
 Quantity: 3.0000 EA
 Open Quantity: 3.0000
 Merchandise Amt: 2,814.00 USD

Distributions

Chartfields: Details, Asset Information, Budget Information

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

OK Cancel Refresh

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

Schedule

Business Unit: SACST
 Requisition ID: NEXT
 Requisition Date: 08/12/2021
 Status: Open

[Return to Main Page](#)

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

Schedule

Details

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

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Section 1.3 Add Comments to a Requisition

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

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

The screenshot shows the 'Maintain Requisitions' interface. At the top, it says 'Maintain Requisitions' and 'Requisition'. Below this, there are several fields and sections:

- Business Unit:** SACST
- Requisition ID:** NEXT
- Requisition Name:** [Empty text box] Copy From
- Status:** Open (with a green checkmark icon)
- Budget Status:** Not Chk'd
- Header:** A dropdown menu with a question mark icon.
- *Requester:** 60101020474 (with a search icon) Massey, Karen D
- *Requisition Date:** 08/12/2021 (with a calendar icon) Requester Info
- Origin:** ONL (with a search icon) On-Line Entry
- *Currency Code:** USD Dollar
- Accounting Date:** 08/12/2021 (with a calendar icon)
- Amount Summary:** A table showing 'Total Amount' as 2,814.00 USD.
- Buttons:** 'Requisition Defaults', 'Requisition Activities', and 'Add Comments' (highlighted with a red box).

- 2. Enter the information that you would like to add

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Comments

Use Standard Comments

Comment Status Active Inactivate +

DEPARTMENT CONTACT IS JANE DOE IN UNDERGRADUATE STUDIES IN EDUCATION, ALPINE HALL 119. 916-278-5555 OR DIANE.DOE@CSUS.EDU.
QUOTE ATTACHED
ICT APPROVAL ATTACHED

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ SACST-NEXT

OK Cancel Refresh

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

Types of information commonly provided include:

- Special Instructions (i.e. Rush Order Information)
- Vendor contact, if applicable; Name and email address to send the PO to for processing.
- Name, contact phone number, and email address for person(s) requesting this purchase (if other than Requester)
- New Supplier
- Existing Supplier Information (if cannot locate supplier ID)
- Specific location for the delivery of items in the order
- ICT Authorization Number for IT-related purchases
- Provide Procurement with additional required information

4. To enter a comment using the pre-defined comments section, click the **Use Standard Comments** link
5. From the standard comments window, enter REQ in the **Comment Type** field.
6. In the **Comment ID** field, click the search icon and select from the search results list.
7. The standard comment will populate in the Comments textbox.
8. Click the **OK** button to continue.

Comments

Use Standard Comments

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Standard Comments

Comments

*Action Copy Comment ▾

Comment Type REQ 🔍

Comment ID PU 🔍

*Effective Date 08/12/2021

*Status Active ▾

Description PICK UP ORDER RESTRICTIONS

Short Desc PICK UP

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

OK Cancel Refresh

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

Requisition Defaults

Requisition Activities

Edit Comments

Section 1.4 Adding Attachments to your Requisition

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

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

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Maintain Requisitions

Requisition

Business Unit SACST Status Open

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester 60101020474 Massey, Karen D

*Requisition Date 08/12/2021 Requester Info

Origin ONL On-Line Entry

*Currency Code USD Dollar

Accounting Date 08/12/2021

Amount Summary ?

Total Amount	2,814.00	USD
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[Requisition Defaults](#) [Add Comments](#)

[Requisition Activities](#)

2. Click "Attach" to upload your document(s)

Header Comments

Business Unit SACST Requisition Date 08/12/2021

Requisition ID NEXT Status Open

*Sort Method *Sort Sequence

Comments | |

Use Standard Comments Comment Status Active +

Send to Supplier Show at Receipt

Show at Voucher

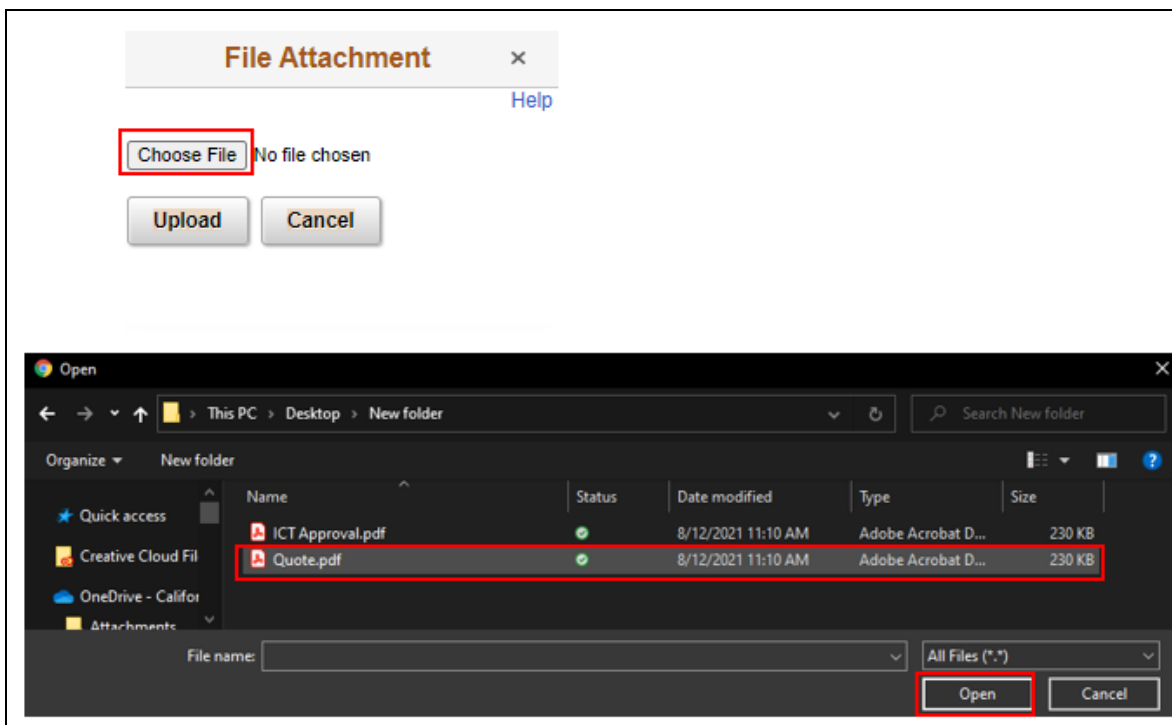
Associated Document

Attachment	<input checked="" type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email
------------	--	-------------------------------------	---------------------------------------	--------------------------------

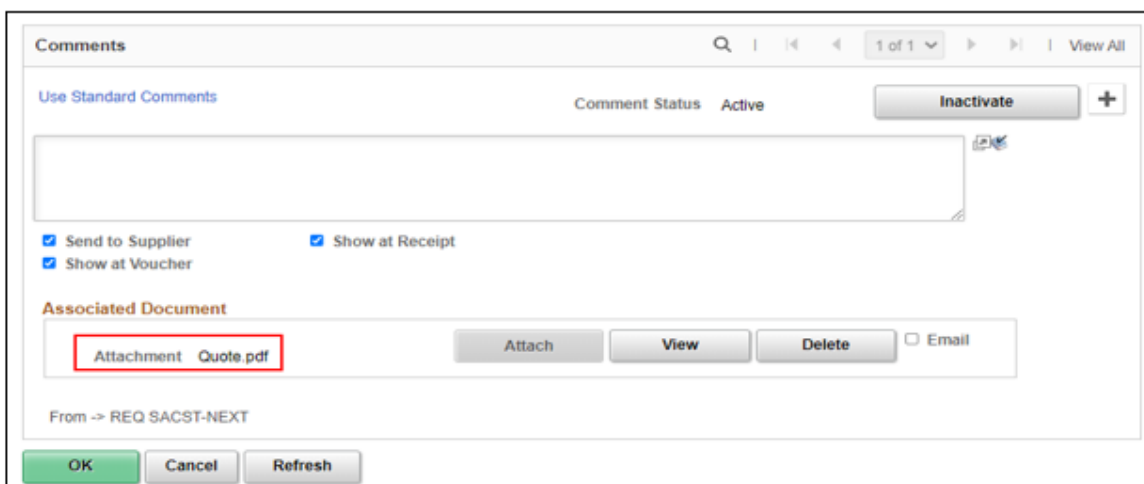
From -> REQ SACST-NEXT

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

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



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

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The screenshot shows a 'Comments' form with a search bar and navigation controls. A red box highlights the '1 of 1' dropdown menu, and a red arrow points to a plus sign next to the 'Inactivate' button. The form includes a text area for comments, checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Associated Document' section with 'Attach', 'View', 'Delete', and 'Email' buttons. The 'From' field is set to 'REQ SACST-NEXT'. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons.

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

The screenshot shows the same 'Comments' form, but the dropdown menu now displays '2 of 2'. A red arrow points to this dropdown. The rest of the form, including the text area, checkboxes, and buttons, remains the same as in the previous screenshot.

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

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Requisition

Business Unit SACST Status Open

Requisition ID NEXT Budget Status Not Chkd

Requisition Name Copy From Hold From Further Processing

▼ Header ⓘ

*Requester 60101020474 Massey, Karen D

*Requisition Date 08/12/2021 Requester Info

Origin ONL On-Line Entry

*Currency Code USD Dollar

Accounting Date 08/12/2021

Requisition Defaults Add Comments

Requisition Activities

Amount Summary ⓘ

Total Amount	2,814.00	USD
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Add Items From ⓘ

Purchasing Kit Catalog

Item Search Requester Items

Line ⓘ

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls ||>

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

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

Save Notify Refresh

11. A Requisition ID has been assigned and the requisition is saved

12. You may now Approve the Requisition by clicking on the green checkmark referenced by the **Status** field.

Requisition

Business Unit SACST Status Open

Requisition ID 3000042258

Requisition Name 3000042258

Budget Status Not Chkd

Hold From Further Processing

Your Requisition Status is now approved.

Requisition

Business Unit SACST Status Approved

Requisition ID 3000042258

Requisition Name 3000042258

Budget Status Not Chkd

Hold From Further Processing

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

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

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Section 1.5 Printing a Copy of the Requisition

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

1. Follow the following path. Navigator>Purchasing>Requisitions>Reports>Print Requisition
2. From the Requisition Print window, click on the Add a New Value tab
3. In the **Run Control ID** field enter req print and click the **ADD** button.
4. A Run Control ID has now been established. In the future, click on the Find an Existing Value tab and enter Req_Print in the Run Control ID field

The screenshot shows a window titled "Requisition Print". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is selected and highlighted in green. Below the tabs, there is a text input field labeled "Run Control ID" containing the text "Req_Print". At the bottom left of the window, there is a green button labeled "Add", which is highlighted with a red rectangular box.

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

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

The screenshot shows a window titled "Print Requisition". At the top, there are three tabs: "Report Manager", "Process Monitor", and "Run". The "Run" tab is selected and highlighted with a red rectangular box. Below the tabs, there are several fields and sections. The "Run Control ID" field contains "Req_Print" and the "Language" dropdown menu is set to "English". There are radio buttons for "Specified Language" (selected) and "Recipient's Language". Below this is the "Report Request Parameters" section. It contains several input fields: "Business Unit" with "SACST", "Requisition ID" with "3000042258", "From Date", "Through Date", and "Requester". To the right of these fields is the "Statuses to Include" section, which has four checkboxes: "Approved", "Canceled", "Completed", and "Open", all of which are checked. A "Select All" button is located to the right of these checkboxes. Below the checkboxes is a dropdown menu set to "NOT On Hold", which is also highlighted with a red rectangular box. At the bottom of the window, there are buttons for "Save", "Notify", "Add", and "Update/Display".

The Process Scheduler Request page will display

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

Process Scheduler Request

User ID: 60102088127 Run Control ID: Print_Requisition

Server Name: [Dropdown] Run Date: 08/13/2021 [Calendar]

Recurrence: [Dropdown] Run Time: 2:57:21PM [Reset to Current Date/Time]

Time Zone: [Dropdown]

Process List

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

[OK] [Cancel]

The Requisition Print screen will re-display, this time showing a Process Instance number.

- Click the **Process Monitor** link

Print Requisition

Run Control ID: Print_Requisition Report Manager: [Process Monitor] [Run]

Language: English [Dropdown] Specified Language: [Selected] Recipient's Language: [Unselected]

Process Instance: 21579104

Report Request Parameters

Business Unit: SACST [Search]

Requisition ID: 3000041325 [Search]

From Date: [Calendar] Through Date: [Calendar]

Requester: [Search]

Statuses to Include

- Approved
- Canceled
- Completed
- Open
- Pending

[Select All] On Hold AND Not On Hold [Dropdown]

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

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

View Process Request For

User ID: 60102088127 [Search] Type: [Dropdown] Last: [Dropdown] 60 Days [Dropdown] [Refresh]

Server: [Dropdown] Name: [Search] Instance From: [Calendar] Instance To: [Calendar] Report Manager

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

Process List

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

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

Process Detail

Process

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

Run

Run Control ID	Print_Requisition
Location	Server
Server	PSUNX
Recurrence	

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Re-send Content

Date/Time

Request Created On	08/13/2021 2:58:04PM PDT	<p>Actions</p> <p>Parameters Transfer</p> <p>Message Log</p> <p>Batch Timings</p> <p>View Log/Trace</p>
Run Anytime After	08/13/2021 2:57:21PM PDT	
Began Process At	08/13/2021 2:58:29PM PDT	
Ended Process At	08/13/2021 2:58:42PM PDT	

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

View Log/Trace

Report

Report ID	12493336	Process Instance	21579104	Message Log
Name	PORQ010	Process Type	SQR Report	
Run Status	Success			

Requisition Print SQR

Distribution Details

Distribution Node	FCFSPRD	Expiration Date	09/27/2021
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File List

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

CFS Requisition Process Guide

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

Requisition
Cal State Univ Sacramento

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

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

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

CFS Requisition Process Guide

Section 1.6 Requisition Checklist

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

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

Services

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

Service dates

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

Must use category code:

96200 – Services

91900 – Information & Communications Technology

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

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

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

ICT Review - Purchases of IT items, equipment, and/or software require an ICT approval, as a result of the CSU Information Security, Federal Law Section 508, and CSU Executive Order 1111. [ICT Procurement Review Information](#)

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

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

Commodities

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

Shipping costs

If applicable, Include: Quote, ICT approval

Must use category codes: 57800 – Goods (Commodities) 91900 – Accessible Technology Initiative

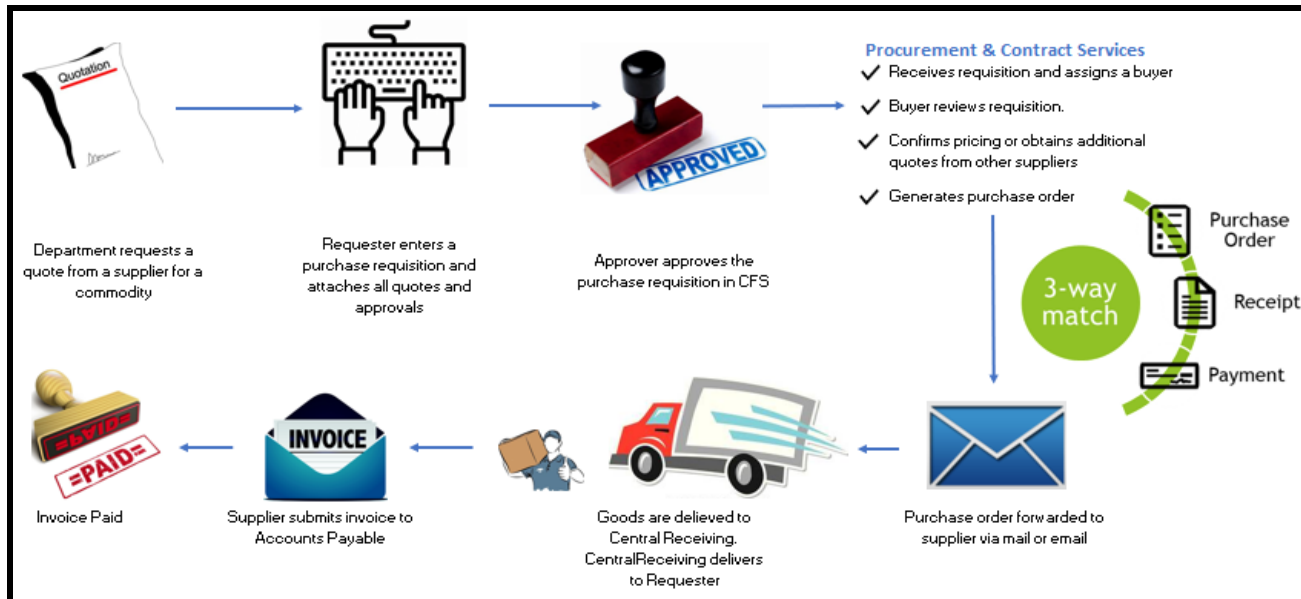
Furniture - any new furniture or changes to the configuration of a space will need to be reviewed by Facilities Management for ADA compliance. Contact: tania.nunez@csus.edu

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

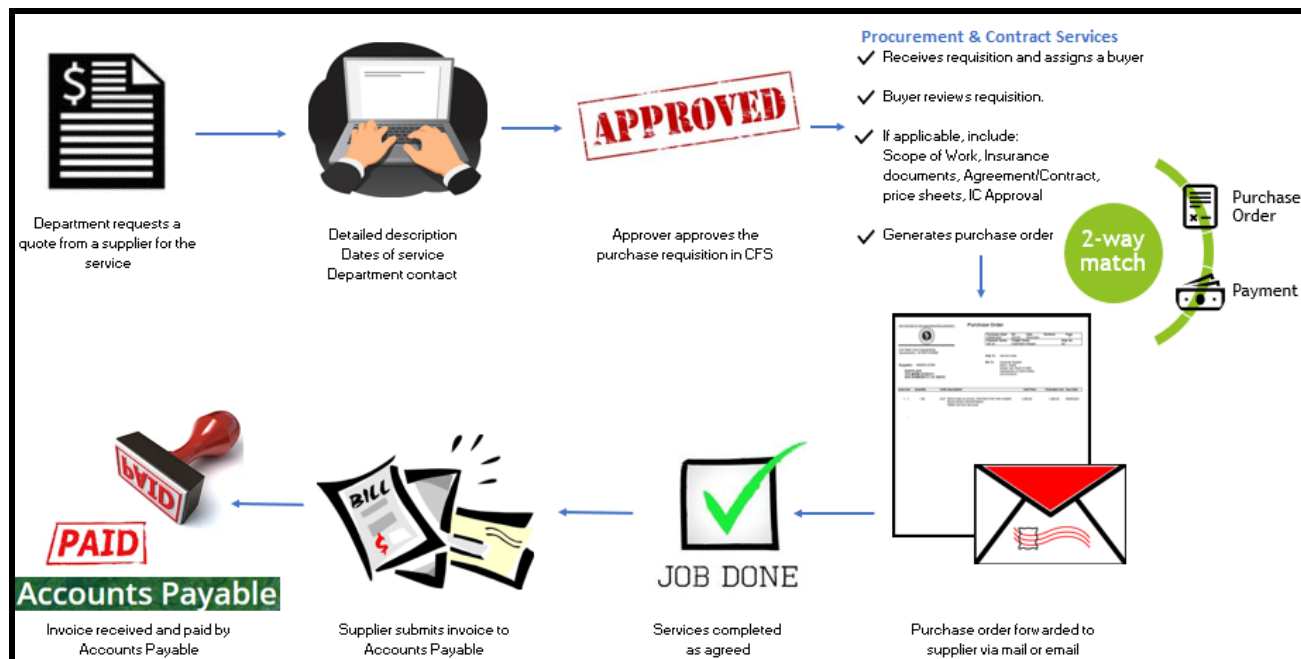
CFS Requisition Process Guide

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

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



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



CFS Requisition Process Guide

Section 2.0 How to Determine the Buyer of Record

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



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

Requisition Inquiry

Business Unit: SACST

Requisition ID: 3000038953

Requisition Name: []

Req Status: []

Requester: []

Requisition Date: []

Supplier SetID: SACST

Supplier ID: []

Item SetID: SACST

Item Description: [] (254 characters remaining)

Department: []

Buttons: OK, Cancel

5. Click on the **Requisition** number

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

CFS Requisition Process Guide

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

Requisition Details

Business Unit	SACST	Req ID	3000038953	
Requester	Physical_Therapy			
Requisition Date	03/03/2020	Merchandise Amount	10,950.75	USD
Req Status	Complete	Pre-Encumbrance Balance	0.00	USD

Requisition Details

☰ Q

Details **More** Contract ||▶

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

Buyer name and number identified below

Buyer Name	Buyer Number
Head, Sebastian	60223022865
Holmberg, Kimberley	60102088127
House, Gary L	60223016560
Paclibar, Kathleen	60223009657
Smith, Kasandra	60210532921
Tilby, Terry Shon	60223024529