

1

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1. Create a New Requisition

Step A: Navigate to Add/ Update Requisitions page Main Menu (1)→ Purchasing Folder (2) → Requisitions Folder (3) → Add/ Update Requisitions (4)



Step B: Create a New Requisition

To create a new requisition, click on the "ADD" button NOTE: Do **NOT** change the Requisition ID from NEXT

Requisitions

Eind an Existing Value	Add a New Value
Business Unit: SFCMP	2
Add	

Find an Existing Value | Add a New Value

Step C: Basic Information

- 1. You may name your requisition under the "Requisition Name" field (1). If you don't name it, the system will auto fill the requisition number into that field.
- 2. Enter your CFS ID (2). The number is 75 and your UIN. EX: 75900000132
- 3. Click on "Requisition Defaults" (3)

Maintain Requisitions			
Requisition			
Business Unit S Requisition ID	SFCMP NEXT		1
Requisition Name	Dell Computer for Ste	eve S	mith Copy From
マ Header (?)			
*Requester 7	5900000132	Q	Guy,Louise
*Requisition Date 0	6/23/2014	31	Requester Info
Origin	DNL	Q	Online Entry
*Currency Code	JSD		Dollar
Accounting Date	6/23/2014	31	
3	Requisition Defaults		Add Comments

Step D: Requisition Defaults

- 1. Enter your Supplier (Vendor) ID (1)
- Enter your Category Code (2). If you have multiple lines, choose the code that best describes your overall order. Please use the SAME Category Code for all lines.
- http://fiscaff.sfsu.edu/sites/sites7.sfsu.edu.fiscalaffairs/files/forms/pdf/category_codes_2014_0.pdf
- 3. Enter the UOM (3). <u>ONLY</u> use "EA" or "LOT". <u>DO NOT</u> use any other UOM.
- 4. Click "Ok" (4)

***DO NOT select your own Buyer.** Please reference to REQ Refresher Training Guide #1 <u>http://fiscaff.sfsu.edu/sites/sites7.sfsu.edu.fiscalaffairs/files/forms/pdf/requisition_refresher_training_2014_04_22_1_0_0.pdf</u> ***DO NOT** enter your chartfield in the Requisition Defaults. Enter your chartfield in the Schedule Distribution (Reference to Step G, Page 5)

Requisition De	faults											
	Business Unit SFC	MP			Requisi	tion Date 0	6/23/2014					
	Requisition ID NEX	т		Status Open								
Default Options	?											
Default	lf you s applied and the	elect this optio if no other defa values on this	n, the default ult values ar page are not	values entered or e found for each fie used.	this page are tr ld. If default valu	eated as par es already e	t of the defaulting log xist in the hierarchy,	gic and are only they are used,				
Override	lf you s hierarch	elect this optio ny, only non-bla	n, all default ink values ar	values entered on e assigned.	this page overrid	e the default	values found in the	default				
_ine												
	Buyer NEVER P	UT IN THE BUYER	ID Q		3 —	Unit of	Measure EA					
1	Supplier 000000	4672	Q DELL	MARKETING		Supplier	Location MAIN	\bigcirc				
2	Category 20400		Q	S	upplier Lookup							
chedule												
	Ship To REC_L	OC 🔍 Re	ceiving Loca	tion		*Dis	tribute By Quantity	· •				
	Due Date	31										
Ultim	ate Use Code											
	Attention To											
Distribution												
	SpeedChart											
Distributions							Personalize	Find View All				
Details Asse	et Information											
)ist 📍 Percen	t GL Unit Ac	count	Fund	Dept	Program	Class	Project	Budget Date				
· •	SFCMF	Q	Q	Q		Q		06/23/2014				
OK C	ancel Defreeh]										

Step E: Add Comments/ Header Comments – Enter end-user's info, attach quote(s), notes to Buyer *Please reference to REQ Refresher Training Guide #4, 5, and 6 http://fiscaff.sfsu.edu/sites/sites7.sfsu.edu.fiscalaffairs/files/forms/pdf/requisition_refresher_training_2014_04_22_1_0_0.pdf

Maintain Requisitions			
Requisition			
Business Unit Requisition ID	SFCMP NEXT		
Requisition Name	Dell Computer for St	eve S	Smith Copy From
マ Header (?)			
*Requester	7590000132	Q	Guy,Louise
*Requisition Date	06/23/2014	31	Requester Info
Origin	ONL	Q	Online Entry
*Currency Code	USD		Dollar
Accounting Date	06/23/2014	31	
	Requisition Defaults		Add Comments
	Requisition Activities		

- 1. Enter the end-user's information (Name, Email, and Phone Number) (1)
- 2. Attach quote, proposal, or contracts (2)
- 3. Click "Ok" (3)

Header Comments

Business Unit SFCMP	Requisition Date 06/23/2014	
Requisition ID NEXT	Status Open	
*Sort Method Comment Time Stamp	*Sort Sequence Ascending	
Comments	Find View All First 🗹 1 of 1 🕨	Last
Use Standard Comments	Comment Status Active Inactivate	+
PLEASE CONTACT: STEVE SMITH EMAIL: SCSMITH@SFSU.EDU TELEPHONE: 415-338-3879		
Send to Supplier Show at Receipt Show at Voucher	2	
Associated Document		
Attachment	Attach View Delete Email	
From -> REQ SFCMP-NEXT		
OK Cancel Refresh		

THE CALIFORNIA STATE UNIVERSITY: Bakersfield, Channel Island, Chico, Dominguez Hills, East Bay, Fresno, Fullerton, Humboldt, Long Beach, Los Angeles, Maritime Academy, Monterey Bay, Northridge, Pomona, Sacramento, San Bernardino, San Diego, San Francisco, San Jose, San Luis Obispo, San Marcos, Sonoma, Stanislaus

*To attach your file—Click on "Choose File" \rightarrow select your file then click "open" \rightarrow Click "Upload"

	File	Attachment			
				Help	
	Cho	ose File No fi	le chosen		
	Unlos	ad Cancel	ie enosen		
	Opius	Cancer			
💿 Open					X
	Test		- - 4 γ	Search Test	Q
Organize 👻	New folde	r		8==	- 1 0
☆ Favorites	^	Name	Date modified	Туре	Size
Desktop		Dell Quote 123	6/23/2014 10:14 AM	Microsoft Word D	13 KB
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Document	ts				
Pictures				2	
📑 Videos	-				
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				Open 🖵	Cancel
	_				
	Fil	e Attachment			
				Help	
	Ch	oose File Dell	Quote 123.doc	x	
	Upl	oad Cancel			

Step F: Description, Quantity, and Unit Price

*Enter your item description (1), quantity (2) and unit price (3).

*For more information on Each vs LOT, please reference to Requisition Refresher Training Guide #7

Line (?)		1		2			3	Personalize Find	View All 🖾 🛗	F	irst 🖪	1 of 1	🕨 La	ast
Details	Ship To/Due Date	Status	Supplier Information	Item Inform	ation	Attributes	<u>C</u> ontrac	t Sourcing Control	s					
Line	Description		Quantity	*UOM	Catego	ry	Price	Merchandise Amount	Status					
1	DELL COMP 123	ূর	Ka 1.0000	EA Q	20400	Q	920.0000	920.00) Open	\bigcirc	œ	1	+	-

Step G: Chartfield/ Schedule Distributions – Click on "Schedule" (the red icon)

Maintain	Requisitions								`		,					
Requis	ition															
	Business Unit Requisition ID	SFCMP NEXT						Budge	Status t Status	Open Not Chk'd	ll C	1				
	Requisition Name	Dell Computer	for Stev	ve Smith	Copy F	rom				Hold Fi	rom Further P	rocessi	ng			
Prese Heade	er 👔															
	*Requester	75900000132	(Guy,Louise												
	*Requisition Date	06/23/2014	[Requester Ir	nfo											
	Origin	ONL		Online Entry	/											
	*Currency Code	USD		Dollar												
	Accounting Date	06/23/2014	6	24												
		Requisition Defa	aults	Edit Comme	ents		Amour	nt Summary (2							
		Requisition Acti	vities					Total A	Amount		920.00 USI	D				
Add Item	is From 👔															
		Purchasing Kit Item Search		Catalog Requester It	ems											
Line 🕐									Persona	alize Find	View All 🗷	1 🔠	First	1 of 1	🕑 Las	st
Details	Ship To/Due Date	Status	Suppli	er Information	Item Inform	nation	Attribut	es <u>C</u> ontract	t Sou	rcing Contr	ols 💷					
Line	Description			Quantity	*UOM	Catego	ry	Price	Mercha Amount	ndise t	Status			- 🔸		
1	DELL COMP 12	3 /2	R,	1.0000	EA 🔍	20400	Q	920.00000		920.00	Open	\leq		2	+.	
View Printa	able Version							*G	io to …N	lore			•			
Save Save	🔄 Notify 🏾 🍫 Re	efresh													E A	dd 🥻

*From Schedule Page – Click on "Distributions" (icon with 3 little black arrows)

Maintain R	equis	itions												
Schedul	е													
Business Ur	nit	SFCMP		R	equisition Date	06/23/2014								
Requisition	ID	NEXT			Status	Open								
Return to Ma	ain Pag	le												
Line											Find	View All	First 🔳 1 (of 1 🕨 Last
1 Iter	m			DELL COMP 123	Quantity	1.	0000	Each	М	erchandise Amt		920.0	0 USD	
Schedule	•								Perso	onalize Find View	/ All 🛙	2 🔠	First 💶 1 of 1	🕨 Last
Details														
Sched		*Ship To		Quantity	Price	Merchand Amo	lise unt	Due Date		Attention To		Status		
1	ŀ	REC_LC	, 1 1	1.0000	920.00000	92	20.00		31	Guy,Louise	۹	Active		+
Add Ship To	Comr	nents otify 🏾 🍄 Re	fresh									E+ Ad	d 🖉 Upda	te/Display

Enter your requisition chartfield (Minimum requirement: Account Code (1), Fund Code (2), and Dept ID (3)) & Click "Ok" (7)

*Your chartfield may have optional fields, such as Program (4), Class (5), and/or Project Code (6). You may enter it before clicking "Ok" (7).

*Please reference to "Requisition Account Code Reference Guide" on Fiscal Affair's Website

Maintain Re	quisitions													
Distributi	on													
	Requisiti	on ID NEXT				It	em			DELL COMP	123			
		Line 1				Sta	tus Active							
	Sche	edule 1												
	Shi	ip To REC_LO	C Rece	eiving		Quantity	/	1.0000 E	A					
	*Distribut	te By Quantity	•			Open Quantity	Y	1.0000						
					Me	rchandise Am	t	920.00 U	SD					
	Speed	Chart	Q Mult	i-SpeedCharts										
Distribution	IS						1	2		Personaliz	e Find V	iew All [🖉 🛛 🔠	First 🔳 1 d	of 1 🕑 Last
Chartfields	Details	Asset Inform	mation Budge	et Information			1	1	3		4 .	5 6		
Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept		Program	Class	Project		
1	Open	100.0000	1.0000	920.00	SFCMIQ	616802	Q NG001	6075	Q	Q	Q		Q	H E
OK	Cancel	Refresh												

* Schedule Page - Click on "Return to Main Page"

N = 1= = =1 = 1 =	quio												
schedule	è												
Business Uni	t	SFCMP			Requisition Date	06/23/2014							
equisition I	D	NEXT			Status	Open							
Return to Mair	n Pag	e 🔶											
ine										Fi	nd V	/iew All 🛛 First 🔳	1 of 1 🖿 La
1 Item				DELL COMP	123 Quantity	1.0000	Each	N	lerchandise Amt			920.00 USD	
Schedule								Pers	onalize Find View	N All	Z	🛗 👘 🔣 1 (of 1 🗈 Last
Details													
Sched		*Ship To		Quantity	Price	Merchandise Amount	Due Date		Attention To			Status	
1	ľ	REC_LCQ	-	1.0000	920.00000	920.00		31	Guy,Louise	3		Active	+
Add Ship To	Comr	nents											
Save 1	₽ No	ntify 👶 Re	frach									🗈 Add 🖉 🕕	odate/Display

Step H: Click "Save" (1) *CFS will assign the requsition number.

Maintain Requisitions								
Requisition			_					
Business Unit SFCMP Requisition ID 1201302206	A REQ	WILL GENERAT	E Budget	Status Open Status Not Chk'd	ц.			
Requisition Name Dell Computer for Steve	Smith			Hold Fr	om Further Proces	ssing		
マ Header								
*Requester 75900000132 *Requisition Date 06/23/2014 Origin ONL *Currency Code USD Accounting Date 05/23/2014 Requisition Defaults Describing Activition	Guy,Louise Requester Info Online Entry Dollar Edit Comments	Amour	t Summary 🧃					
Requisition Activities			Total A	mount	920.00 USD			
Add Items From 👔								
Purchasing Kit Item Search	Catalog Requester Items							
Line (2) Details Ship Io/Due Date Status Supplier	Information Item Inform	mation <u>A</u> ttribute	es <u>C</u> ontract	Personalize Find Sourcing Contro	View All 🔄 🛗 ols 🛛 💷	First	1 of 1	Last
Line 1 Description Q	uantity [*] UOM	Category	Price	Merchandise Amount	Status			
1 🔡 DELL COMP 123 🖉 🖏 1.	0000 EA 🔍	20400 🔍	920.00000	920.00	Open	\bigcirc 10	2	1. –
View Printable Version			*Go	toMore		•		
Save Notify Refresh								📑 Add 🌡

2. Print a Copy of Your Requisition Step A: Click on "View Printable Version"

Requis	ition															
	Business Unit Requisition ID	SFCMP 1201302206						Budge	Status Oper Status No	pen ot Chk'd	101					
	Requisition Name	Dell Computer	r for Steve	Smith						Hold F	rom Further Pro	cessing				
♥ Heade	er 👔															
	*Requester	75900000132	G	Guy,Louis	e											
	*Requisition Date	06/23/2014	21	Requester	Info											
	Origin	ONL	G	Online Ent	TV											
	*Currency Code	USD		Dollar												
	Accounting Date	05/23/2014	31	1												
		Requisition De	faults	Edit Comn	nents		Amou	nt Summary	(?)							
		Requisition Ac	tivities					Total	Amount		020 00 1180					
		Document Sta	itus					Total	Amount		320.00 030					
Add Item	s From 👔						Select	Lines To Dis	play 👔							
		Purchasing Ki	it	Catalog			Search	for Lines								
		Item Search		Requester	Items			Line	To	Q	Retrieve					
Line (?)									Personaliz	e Find	View All 💷	1	First 🛙	1 of 1	E La	ast
Details	Ship To/Due Date	e <u>S</u> tatus	Supplie	Information	Item Inform	mation	Attribut	es <u>C</u> ontrac	t Sourcir	ng Contr	ols [===)					
Line	Description		c	Quantity	*UOM	Catego	ry	Price	Merchand Amount	ise	Status					
1	B DELL COMP 12	23 /2	6	1.0000	EA Q	20400	Q	920.00000		920.00	Open	0	00	10	+	-
/iew Printa	Ible Version							*0	Go to More				-			
-	0.0	oh 🖂 Noti	6. A.	Defrach											E.	

Step B: CFS Message will pop up. Click "Ok"



Step C: Navigate to Process Monitor

Main Menu (1) \rightarrow People Tools Folder (2) \rightarrow Process Scheduler Folder (3) \rightarrow Process Monitor (4)

Main Menu - > PeopleTools -> Process Scheduler -> Process Monitor



Step D: Navigate to PDF *Click on "Details" → "View Log/Trace" → "PDF" file *CFS will open another tab from your browser

lew i	rocess	keque	IST FOR									
L	ser ID 759	00000	132 Q	Туре		▼ Last	•		1 Days	s •	Refres	h
1	Server		•	Name	1	1nstance		to]		
Dun												
Run	Status		•	Distribu	ution Status	Υ.	Save Or	n Refresh				
Run	Status		•	Distribu	ution Status	•	Save Or	n Refresh				
Proce	status ess List		•	Distrib	ution Status		Save Or	n Refresh sonalize Fi	nd View /	AII 🖾 🛗	First 💶 1-2 o	f 2 📧 Las
Proce	ess List	Seq.	• Process T	Distribe	Process Name	v User	Save Or Pers Run Dat	n Refresh sonalize Fi te/Time	nd View /	All 💷 🔠 Run Stat	First 1-2 o tus Distributi Status	f 2 🕨 Las on Detai
Proce	status ess List Instance 5691385	Seq.	Process Ty SQR Repo	Distrib ype t	Process Name PORQ010	User 75900000132	Save Or Pers Run Dat 06/23/20	n Refresh sonalize Fi te/Time 014 11:30:12	nd View /	All 🖉 🔠 Run Stat	First 1-2 o tus Distributi Status Posted	f 2 Las on Detail

Process List | Server List

Process Detail

Process	
Instance 5691385	Type SQR Report
Name PORQ010	Description Requisition Print SQR
Run Status Success Distrib	ution Status Posted
Run	Update Process
Run Control ID PS_REQ_SFCMP1201302206_2185990 Location Server Server PSUNX Recurrence	 Hold Request Queue Request Cancel Request Delete Request Restart Request
Date/Time	Actions
Request Created On 06/23/2014 11:30:13AM PDT	Parameters Transfer
Run Anytime After 06/23/2014 11:30:12AM PDT	Message Log
Began Process At 06/23/2014 11:30:25AM PDT	Batch Timings
Ended Process At 06/23/2014 11:30:39AM PDT	View Log/Trace

OK Cancel

	View Log/	Trace									
	Report										
	Report ID:	51052	Process In	stance:	5691385			Message Log			
	Name:	PORQ010	Process Ty	/pe:	SQR Rep	port					
	Run Status:	Success									
	Requisition F	Print SQR									
	Distribution	n Details									
	Distributio	n Node: FBCFSTRM	i Ex	piration	Date:	08/07/20)14				
	File List										
	Name			File Siz	e (bytes)	Date	time Cre	eated			
	SQR_PORQ	010_5691385.log		1,699		06/2	3/2014 1	I:30:39.996122A	M PDT		
	porq010_569	1385.PDF 🚽 🗕	_	4,853		06/2	3/2014 1	1:30:39.996122A	M PDT		
	porq010_569	1385.out		70		06/2	3/2014 1	1:30:39.996122A	M PDT		
	Distribute T	0									
	Distribution ID Type	*Distribution ID									
	User	75900000132									
	Return										
Chi Process Monitor	nc//cmsdeu6-reports	*			or other	-	-				
	v6-reports.calstate	.edu/psreports/FBCFSTRN	/51052/porq010	_5691385.P	DF						
Apps 📄 Print 🦳 Imported From IE	d Apple Ecommerce	Apple Order Status	M Best 🔂 CSU Co	ntracts 😑 De	Il Premier 📰	Dictionary	Fiscal Affairs	🗋 Imaging System 🗋	SFSU Directory W Wikip	edia 🚺 Yahool 👌 Y	(elp
				R	equi	sitio	n				
			Sa	n Fran	cisco S	tate U	niversi	ty			
							Rusine	ss Unit	SECMP	OPEN	
	_	2 12					Reg ID		Date	OT EN	Page
Ship To:	Receiving	Location					1201302	206	06/23/2014	Entered Du	1
	1600 Holl	oway Avenue					Guy,Loui	se	415/338-2501	Guy,Louise	
	San Franc	cisco CA 94132					1				

3. Sending a Requisition for Approval

Requestors can copy and paste the requisition number onto an email and send it to your approver(s). Example: REQ: 1234567890 is ready for review and approval.

4. Requisition Approval

Step A: Navigate to Add/ Update Requisition Main Menu (1) \rightarrow Purchasing Folder (2) \rightarrow Requisition Folder (3) \rightarrow Add/ Update Requisitions (4)



Requisitions

Use the following search to look for an existing Requisition.

Business Unit: 1	= • SFCMP	Q
Requisition ID:	begins with • 1201302206	
Requisition Name:	begins with 🔻	
Requisition Status:	= •	
Origin:	begins with 🔻	Q
Requester:	begins with 🔻	Q
Requester Name: 3	begins with 🔻	Q
Hold From Further Proce	ssing	

Step C: Approve and Budget Check

*ALL approvers must review the requisition **BEFORE** approving it.

*Click "Approve" (1) *Green Check icon and click "Budget Check" (2) *Excel Spreadsheet with magnifying glass icon

Requisition			1.
Business Uni	it SFCMP		Status Open
Requisition I	D 1201302206		Budget Status Not Chk'd
Requisition Nam	e Dell Computer for Stev	e Smith	Hold From Further Processing
∀ Header 			
*Requeste	er 7590000132		
*Requisition Dat	te 06/03/0014	Guy,Louise	2
Colorial	0 00/23/2014	, Requester Into	
*Current Cod		Online Entry	
Currency Cod	e USD	Dollar	
Accounting Date	e 05/23/2014)	
	Requisition Defaults	Edit Comments	Amount Summary 👔
	Requisition Activities		
	Document Status		Total Amount 920.00 USD
Add Items From 🧿			Select Lines To Display (?)
	Purchasing Kit	Catalog	Search for Lines
	Item Search	Requester Items	Line To Retrieve
Line 😨			Personalize Find View All 💷 🔠 🛛 First 💶 1 of 1 🕨 L
Line ② Details Ship To/Due Dat	te <u>S</u> tatus <u>S</u> upplie	Information Item Informatio	Personalize Find View All I
Line (2) Details Ship To/Due Dat .ine Description	te <u>S</u> tatus <u>S</u> upplie	r Information Item Informatio	Personalize Find View All 20 1 First ▲ 1 of 1 ▲ L n Attributes Contract Sourcing Controls TTTP egory Price Merchandise Amount Status
Line ② Details Ship Io/Due Dat ine Description 1 Details Details	te <u>S</u> tatus <u>S</u> upplie	r Information Item Informatio Quantity *UOM Cat 1.0000 EA Q 204	Personalize Find View All [27] [27] [27] First II 1 of 1 II] L n Attributes Contract Sourcing Controls First II 1 of 1 II] L egory Price Merchandise Amount Status III L 00 920.00000 920.00 Open [27] [28] [28] [28] [28]
Line ② Details Ship Io/Due Dat Line Description 1 B DELL COMP Yew Printable Version	te Status Supplie	r Information Item Informatic Quantity UOM Cat 1.0000 EA Q 204	Personalize Find View All ☐ ☐ First I 1 of 1 ▶ L in Attributes Contract Sourcing Controls First I 1 of 1 ▶ L egory Price Merchandise Amount Status Image: Control I I I I I I I I I I I I I I I I I I I

10

*Once you click "Approved" and "Budget Check", the status will change to "Approved" (1) and "Valid" (2) *Reminder: the Approver is **NOT** allowed to make any changes once the requisition is approved and budget checked.

Requisition	
Business Unit SFCMP	Status Approved <table-cell-columns> 1 🗙</table-cell-columns>
Requisition ID 1201302206	Budget Status Valid <2
Requisition Name Dell Computer for Steve Smith	Hold From Further Processing

5. Check the Status of Your Requisition

Step A: Navigate to Requisition Document Status Main Menu (1) \rightarrow Purchasing Folder (2) \rightarrow Requisition Folder (3) \rightarrow Review Requisition Information Folder (4) \rightarrow Document Status (5)

Sea	h Menu:	2 >>>	4 »	Advanced Search	🔍 Last Search R
	Accounts Payable Purchasing Suppliers Set Up Financials Reporting Tools PeopleTools Banking CSU Claims Proct CSU ProCard Supplier Contracts eProcurement Services Procurement My Personalizations	Requisitions Request for Quote Purchase Orders Receipts Return To Vendor CSU Req to Check Not	Review Requisition Reports Add/Update Requi Purge Load Reque	Requisitions Accounting Entries Workbench Document Status	- 5

Step B: Search with the Requisition Number Enter your requisition number in REQ ID field (1) then click "Search" (2)

Requisition Document Status

Enter any information you have and click Search. Leave fields blank for a list of all v

Find an Existing \	/alue		
Business Unit:	= •	SFCMP	Q
Requisition ID:	begins with 🔻	1201302206	1
Requisition Status:	= ▼		•
Requisition Date:	= •		31
Origin:	begins with 🔻		Q
Requester:	begins with •		Q
Description:	begins with •		
Case Sensitive			
Search Cle	ar Basic Sea	rch 📳 Save Search Crite	eria

*Your requisition must be Approved (1) and Budget Check -Valid (2) before the Purchasing can act on it.

*If the Purchase Order "Status" is DISPATCHED (3), that means your requisition was converted into a PO, dispatched to the vendor, and your funds were encumbered.

*If you need to obtain a copy of the PO, copy the PO number (2201301348) (4) and search it in the Imaging System

https://sfsu.documentportal.com/servlet/data

Document Status

Documer	t Status							
	Busine	ss Unit SFCMP			Req	ID 1201302206		
	Docume	nt Date 06/23/2	014		Stat	tus Approved 🔶	1	
	C	urrency USD			Document Ty	pe Requisition		
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Associated Documents Actions	Document Related Inf Business Unit	Document Type	DOC ID	3 Status	Budget Star	tus Valid Find View All 환기 Supplier ID	First 1	of 1 📕 Last

6. Check the Encumbrance Balance on Your Purchase Order Step A: Click on the Purchase Order Number "2201301348"

	Busine	ss Unit SFCMP			Req	ID 1201302206		
	Docume	nt Date 06/23/20)14		Stat	us Approved		
	Ci	urrency USD			Document Ty	pe Requisition		
	Req	uester Guy,Lou	iise		Merchandise A	mt 920.00		
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Step B: View Encumbrance Balance

*A new window will open. Make sure you allow CFS popups.

*The encumbrance balance will deduct when there is an invoice paid against it.

Purcha	ise C	order Inqu	uiry										
Purch	nase	e Ordei	r										
	Business Unit SFCMP PO ID 2201301348			PO Status Dispatched Budget Status Valid									
∀ Head A	ler												
	PO Date 06/23/2014 Supplier Name DELLMARK-001 Supplier ID 0000004672 Buyer Trinh,Nancy PO Reference Online Src From Req 1201302206 Header Details All RTV Matching		Supplier Details		Backorder Status Not Backordered Receipt Status Not Recvd								
			s	Activity Summary Header Comments Document Status Actions	Amount SummaryMerchandise920.00Freight/Tax/Misc.80.50Total1,000.50 USDEncumbrance Balance1,000.50 USD					JSD JSD			
Lines							Personalize	e Find View All	🖬 ا 🖾	First	 1 o 	f 1 💽 Last	
ine		Item ID		Item Description	Category	PO Qty	UOM	Merchandise Amount		Status			
1	P			DELL COMP 123	20400	1.000	0 EA	920.00 U	SD	Approved	\mathcal{O}	2	
💂 Ret	turn to	Search	🖃 Notify									🔎 Re	elated

7. Additional Information

- a. Account Codes: http://fiscaff.sfsu.edu/sites/sites7.sfsu.edu.fiscalaffairs/files/forms/pdf/AM_Account_Number_Decision_Tree_2012.pdf
- b. Category Codes: http://fiscaff.sfsu.edu/sites/sites7.sfsu.edu.fiscalaffairs/files/forms/pdf/category_codes_2014_0.pdf
- c. PO Change/ Finalization Form: http://procurement.sfsu.edu/sites/default/files/documents/P.O.%20Cancellation_Change%20Request%20Form.pdf
- d. Requisition Refresher Training Guide: http://fiscaff.sfsu.edu/sites/sites7.sfsu.edu.fiscalaffairs/files/forms/pdf/requisition_refresher_training_2014_04_22_1_0_0.pdf
- e. Icons and Meanings for CFS: Please reference to page 14
- f. SF State Imaging System: Please reference to page 15

Icons and Meanings for CFS

- 1. = Search
- 2. = Line Details and Schedule Detail (it depends on what page you're on)

Line Details

Lin	es																
	De	tails	Π	Ship <u>T</u> o/Due Date 📔 🔒	<u>S</u> tat	tuses 👖 It	em I	n formati	on	A	ttribu	utes	<u>R</u> FQ	<u>C</u> ontrac	t	<u>R</u> eceivin	ig
Lin	14	1	Desc	ription		PO Qty		<u>*UOM</u>	Cat	eqoi	¥	Price		Amount	Due	Date	
	1	F of the second se	Scier V qu J/C r Hode Poly S Strive Bean Style Arm. Moun	tee Room 210 Seating. tote No.12LXB-125291- evised on 5/3/12. el#FSEQ-G - Sequence Seat & Back - G Arm. Seat Style. Straight in Mounted Seats. "G" Folding Plywood Table Basic Style Base. Floor nted/ No Slope.	t	98.00	00	EA	425	500	٩	144.0	0000	14,112.00	06/2	21/2012	B

Schedule Detail





San Francisco State University Imaging System

How to Print a Copy of Your PO in the Imaging System

- 1. Go to Imaging System's website: https://sfsu.documentportal.com/servlet/data
- 2. Type in your User ID and Password then click on Login



3. Select BOTH "Contract" and "Purchase Order" (click on contract then hold onto CTRL and click purchase order) *Make sure it the SEARCHING ON is "Contracts, Purchase Orders"*

Choose docume	nt type	
Insurance Form	ns	▲
Invoices D-Cord Applicat	ione	
P-Card Applicat	Report	
Purchase Order	s	✓
Searching on		
Cou	atracte Durch	and Orders
COL	itiacis, Purci	lase orders
PO Number:	is	×
Vendor ID:	is	×
Vendor Name:	IS	×
Scan Date:	is 🗸 🗸	
Courses	i	
Source:	15	
		Reset all search fields
	Cooreh	
	Search	

15

4. Type in your PO number and click Search

Choose docume	nt type		
Insurance Form	ns	~	
Invoices		(-D)	
P-Card Applicat	Papart		
Purchase Order	s	~	
	-		
Searching on			
Col	ntracts, Pu	urchase	e Orders
	,		
PO Number:	is	*	2201100310
Vendor ID:	is	*	
Vendor Name:	is	~	
Scan Date:	is	*	
Source:	is	*	*
			Reset all search fields
	Se	arch	

5. Click on "Purchase Orders" under the Document Type (a PDF should pop up, which will be your PO)

	Document Type	PO Number	Vendor ID	Vendor Name	Scan Date	Source
1.	Purchase Orders	2201100310	15	FISHER SCIENTIFIC	08/14/2011	ELECTRONIC

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