CSULB Purchasing
Requisition Processing - CFS 9.2

Last Revised: **08/08/17**

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Overview

Requisitions are entered 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.

A Requisition to Check notification process has been implemented. This allows the "Requester" that has been identified on the requisition to know their status of their Requisition as it moves throughout the accounting lifecycle. An email message to the Requester will occur when the following actions are taken:

- 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.

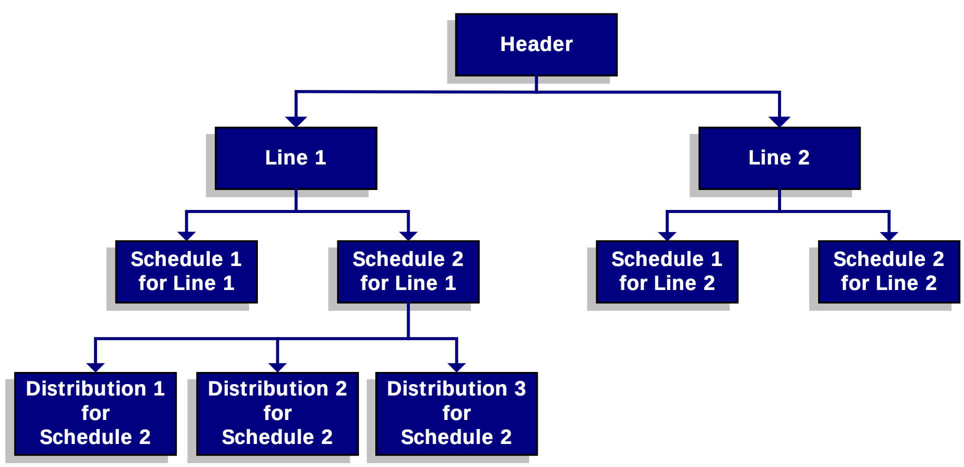
There are multiple roles within CFS that contribute to creating a requisition:

- **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. For each line item the quantity, category, UOM, description, supplier, and price.
- **Schedule -** Defines when (due date) and where you want the line items delivered.
- **Distribution –** Where 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

This function is used to enter a requisition in the CFS PeopleSoft Purchasing Module.

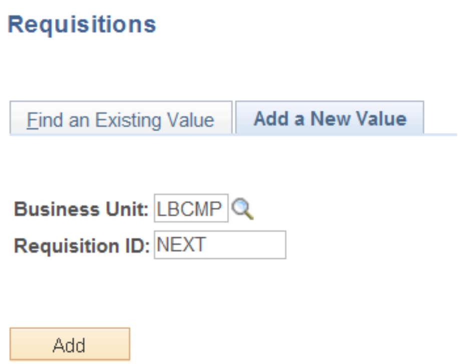
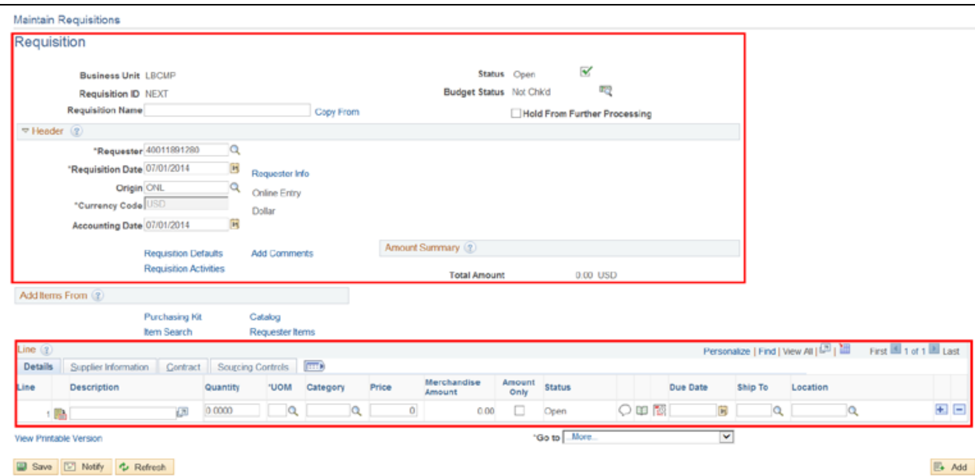
The ***Add/Update Requisition*** process consists of the following steps:

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

2.1 Requisition Entry

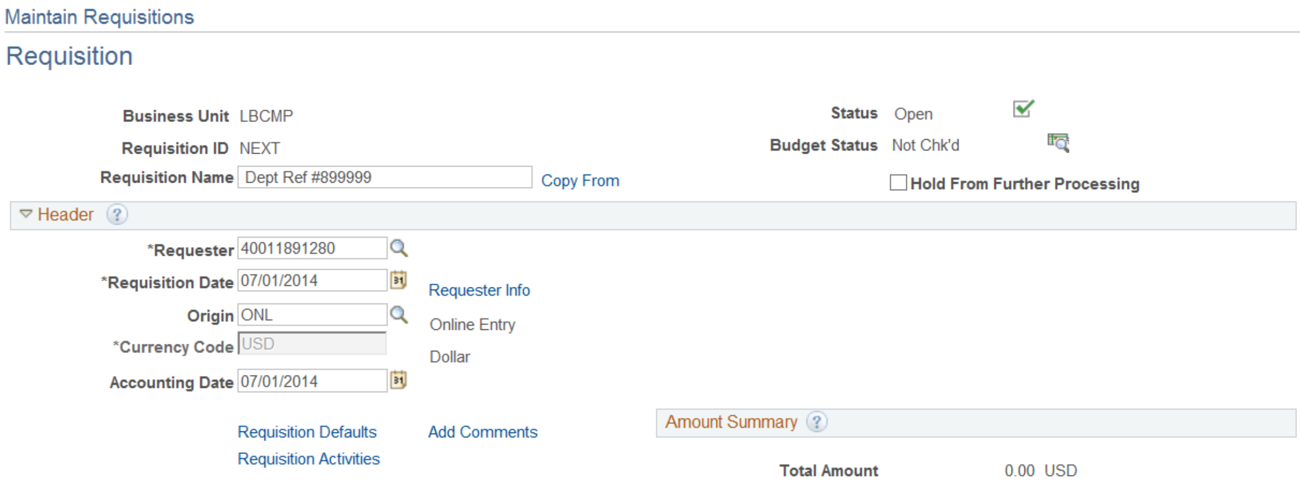
The following navigation is used to access the requisition page:

Navigation: Purchasing > Requisitions > Add/Update Requisitions – Add a New Value

Processing Steps / Field	Screenshot / Description
Business Unit: Select LBCMP, LBFDN, or LB49R Accept the "NEXT" Requisition ID number assigned. This defaults the Requisition ID to the NEXT available number when the requisition is saved. **Do not change this field.** Select "Add".	
Requisitions The Requisitions page contains General Information, Header and Line information, as well as other links.	

Requisition/Header Information

Enter the Requisition Header Information.

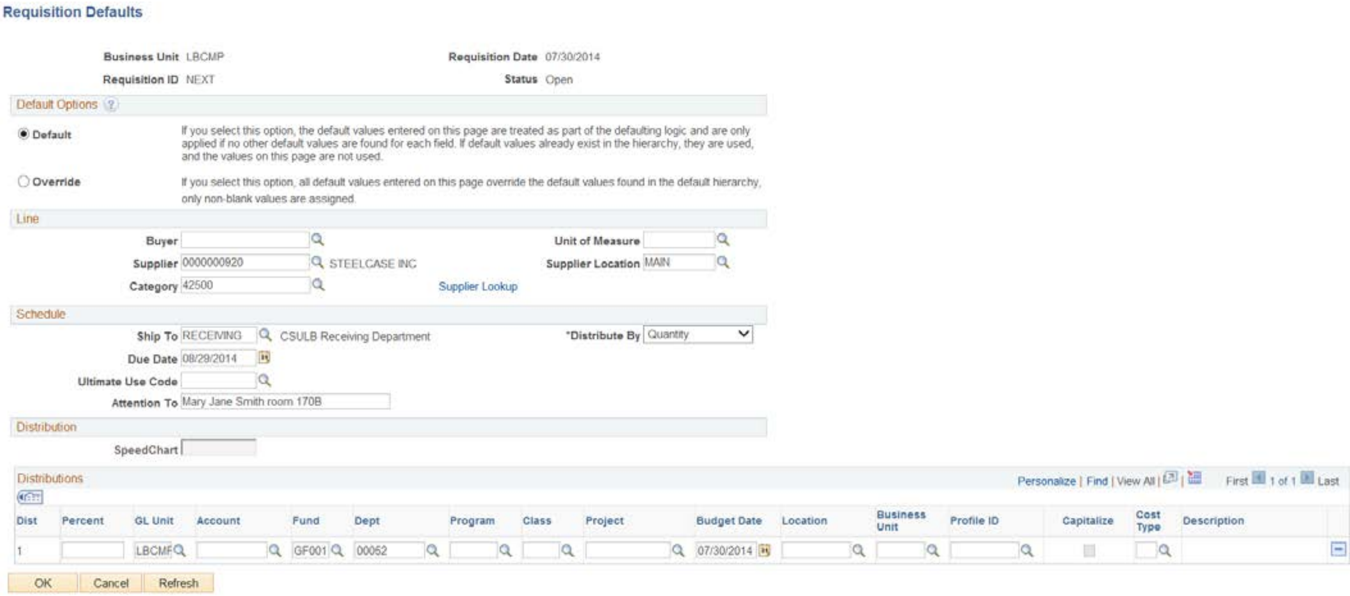


Processing Steps / Field Name	Screenshot / Description
Requisition Name	User Defined. Can be used to cross reference against users department reference number. Carries over to the Purchase Order Distribution Lines, Req Detail tab. Ability to inquiry on this value from various Requisition Inquiry screens.
Status	Displays the requisition status. Defaults to Open.
Budget Status	Displays the requisition budget checking status. Defaults to Not Chk'd.
Hold From Further Processing	Hold from further processing keeps the requisition from being approved and budget checked allowing the user to continue working on an in-progress requisition.
Requester	Defaults to user ID (campus ID number) and can be changed.
Req Date	Defaults to current date.
Origin	ONL. **DO NOT CHANGE.**
Accounting Date	Defaults to Requisition Date. **DO NOT CHANGE except at year-end when creating new fiscal year requisitions using the date that is specified on the Financial Management calendar.** **The accounting date must be changed when a requisition is created before the fiscal period begins. For requisitions to be processed for the next fiscal year Change the Accounting Date field to the upcoming fiscal year date (07/01/20XX). Do this prior to completing the requisition defaults.**
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. If fields are not defined in the table below, they are not currently used. Select “OK” once defaults are specified.

Enter the following Default Information:



Processing Steps / Field Name	Screenshot / Description
Default Options	Use “Default” option
Buyer	Purchasing will assign the buyer to the requisition. **DO NOT CHANGE.**
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 Requistions Page (described in Add/Edit Comments section below).
Category	Specify the category code from which the majority of 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 commonly used category codes. Category codes beginning with 0-8 typically are goods which are quantity based and therefore 3 way match. Category codes beginning with 9 typically are for services which require an authorized signature on the invoice, therefore a 2 way match, 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.
Ship To	Defaults to “RECEIVING”.
Distribute By	Defaults to “Quantity”. This value will automatically change when Amount Only is selected on the line.
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.

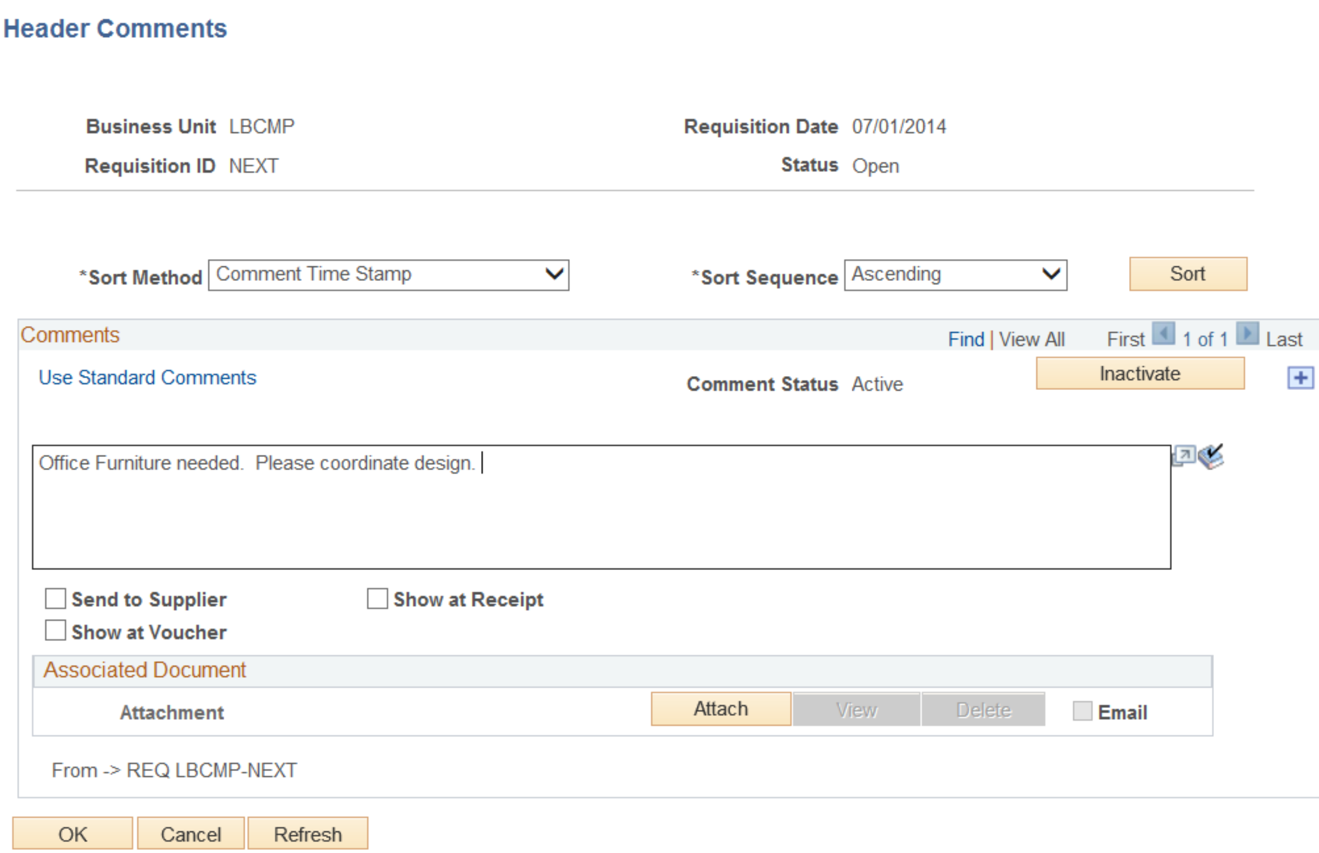
Processing Steps / Field Name	Screenshot / Description
GL Unit	This will default to the user default business unit (LBCMP, LBFDN, LB49R). User will need to change when necessary.
Account	Defaults based on Category code selected. **DO NOT CHANGE.**
Fund	Specify default Fund.
Dept	Specify default Department number.
Program	Specify default Program.
Class	Specify default Class.
Project	Specify default Project.
Location	Specify the building and room number for Receiving to deliver the goods.

Note: If the Requisition Defaults page is modified after lines have been entered on the requisition, the user will be prompted with a "Retrofit Page" which is used to update the existing lines with the new values selected. For single distributions, select" Apply". For multiple distributions, select "Apply to All Distribs".

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 the "Add Comments" link becomes "Edit Comments" after it has been modified.

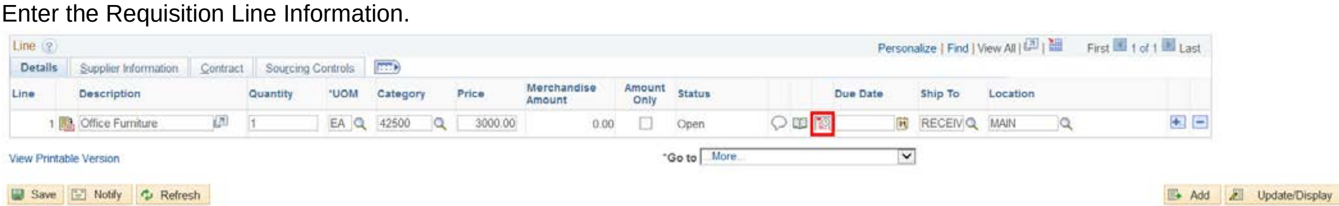
Enter the Comment Information.



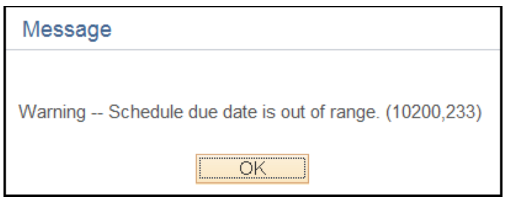
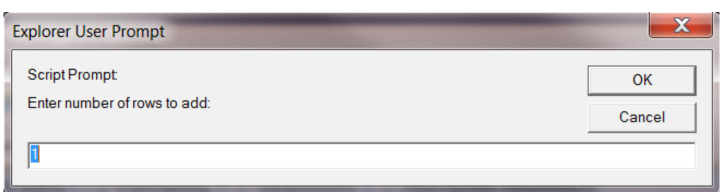
Processing Steps / Field Name	Screenshot / Description
Comments	Use this field to communicate with the various areas. Add notes/comments for Purchasing, Receiving (select "Show at Receipt"), Accounts Payable (select "Show at Voucher") and/or the Supplier/Vendor (select "Send to Supplier").
Send to Supplier	This is a comment intended for the Supplier. It will print at the bottom of the requistion 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.
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 purchase is being split with another department, the delegation of authority for both departments must be included. Attach pdf of 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.

Line Info

Enter the Requisition Line Information.



Processing Steps / Field Name	Screenshot / Description
Description	Enter the description of the Good or Service 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 you want to order.
UOM	Unit of Measure.
Category	Select the category code of the product that 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 commonly used category codes.

Processing Steps / Field Name	Screenshot / Description
	Category codes beginning with 0-8 typically are goods which are quantity based and therefore 3 way match. Category codes beginning with 9 are typically for services which require a authorized signature on the invoice, therefore a 2 way match, and are <u>specified as amount only.</u>
Price	Price per unit of measure.
Amount Only	Amount only should be selected for services. Quantity based requisitions will not have this option selected. Amount only is enabled to permit accounts payable to enter multiple invoices/vouchers on a service PO. If Amount Only is selected, the quantity will change to 1. A notification message will pop-up to communicate this change and distribute by will also change from “qty” to by “amt”.
Due Date	The date you would like the goods/services to be completed. If this is an extended service time request, enter the date you expect the service to expire by. Note: This does not guarantee your request will be met by the specified Due Date. Also, if the date you entered is greater than 30 days from the Requisition Date, you will receive a warning message. Once validated, select OK. 
Ship To Location	Defaults to RECEIVING. **DO NOT CHANGE.**
Schedule Icon	Select the Schedule Icon  to navigate to the Schedule page.
Add/Delete Row To add or delete a Req Line, select the “+” or “-“ at the end of the last line.	 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”. 

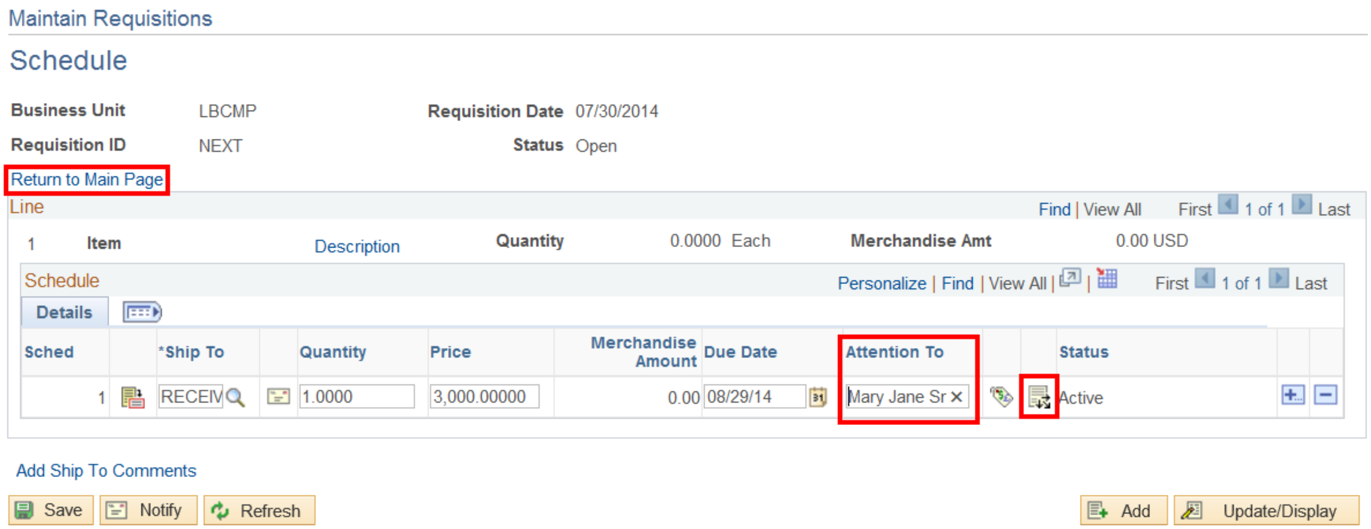
Schedule Info

Use the Maintain Requisitions - Schedule page to specify the person the Goods should be delivered to and to get to the Chartfield distribution page.

If your quantity based good have multiple distributions, create a schedule for each distribution. For example, if Department 123 is purchasing 20 computers on behalf of 3 different departments, line #1-schedule #1 might have 5 computers distribution #1 allocated to GF001-00748; line #1-schedule #2 might have 12 computers with distribution #2 allocated to GF001-00642; and line #1-schedule #3 might have 3 computers with distribution #3 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:

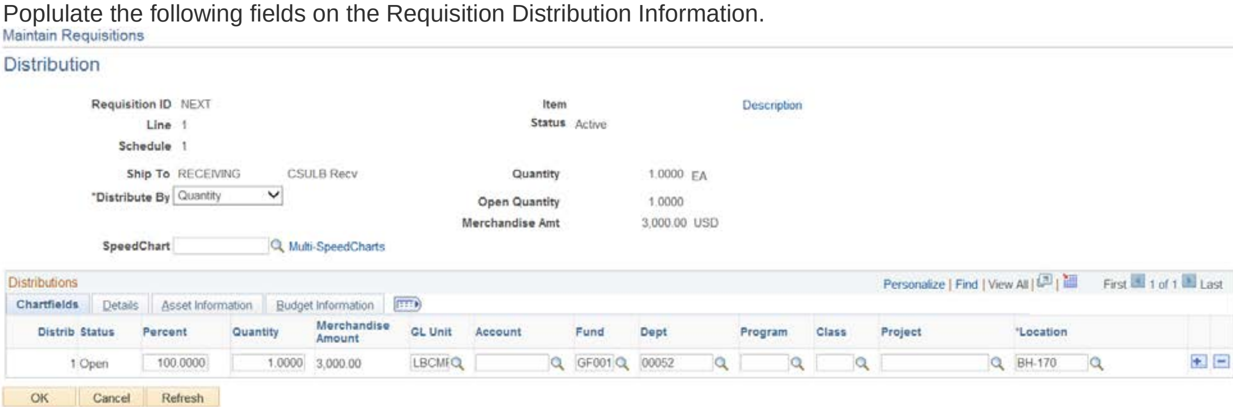


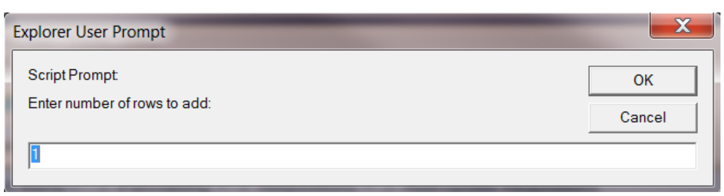
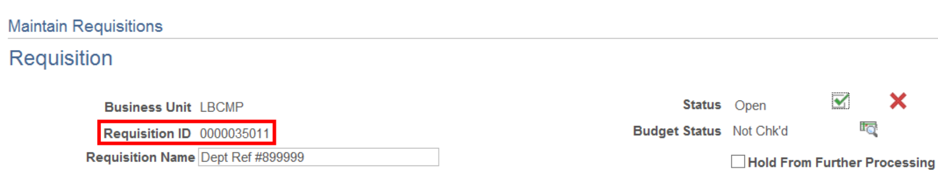
Processing Steps / Field Name	Screenshot / Description
Return to Main Page	This link takes you back to the Main Page of the requisition.
Attention To	This is used in conjuction with the Location. Specify the person whom the goods should get delivered to. The Requester Name will default in this field. 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. If values populated in the Requisition Defaults section, they will appear in the fields.

Poplulate the following fields on the Requisition Distribution Information.

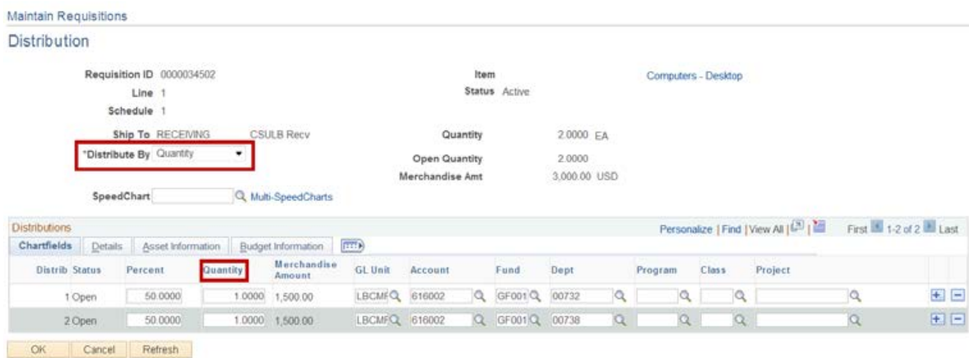


Processing Steps / Field Name	Screenshot / Description
GL Unit	This will default to the user default business unit (LBCMP, LBFDN, LB49R). User will need to change when necessary.
Account	Defaults from the Category Code specified on the Req Line or Req Line Defaults. **Do not Change.** Required.
Fund	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.
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 ditribution, 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. A Requisition ID is assigned.	

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

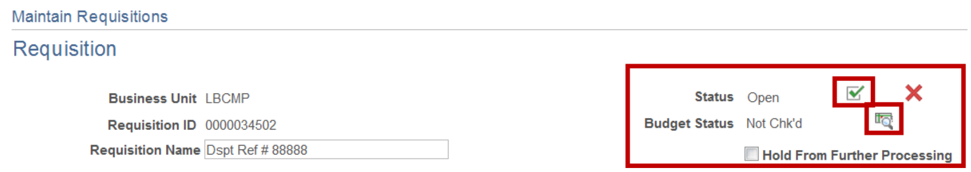
Splitting the Distribution Info

The distribution can be split by line/schedule among two or more departments and/or Chartfield strings. Distributions can be split 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 *Distribution* page (Reduce the quantity and select the "+" to insert another distribution line. The remaining quantity is automatically copied down. Change the distribution accordingly. To split a distribution by dollar amount use the drop down to change the **Distribute by** from Quantity to Amount and enter the dollar amounts.	

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.

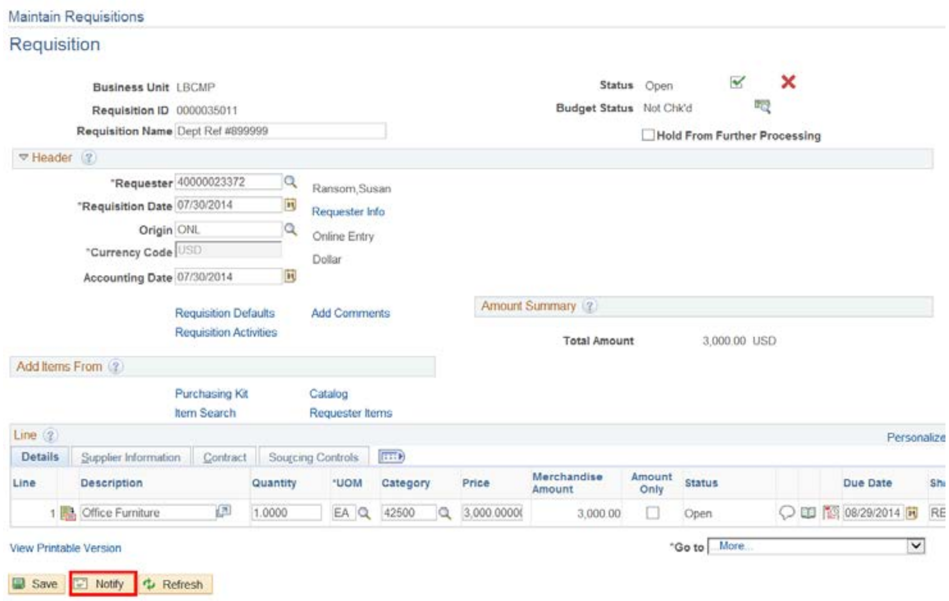
Processing Steps / Field Name	Screenshot / Description
Requisition page Once the Requisition has been saved, it is now ready to be processed. If you put the requisition on Hold, Remove the Hold From Further Processing by unchecking it. Next you want to Approve and Budget Check the Requisition.	
Select the Approval Icon. After the Req is approved the Status will change from Open to Approved.	Approval Icon -  
Once the requisition is approved the budget check icon displays but cannot be run due to security settings. The requisition will be budget checked during the regularly scheduled nightly process. The Budget Status then changes from Not Chk'd to Valid.	Budget Check Icon -  

Important Notes:

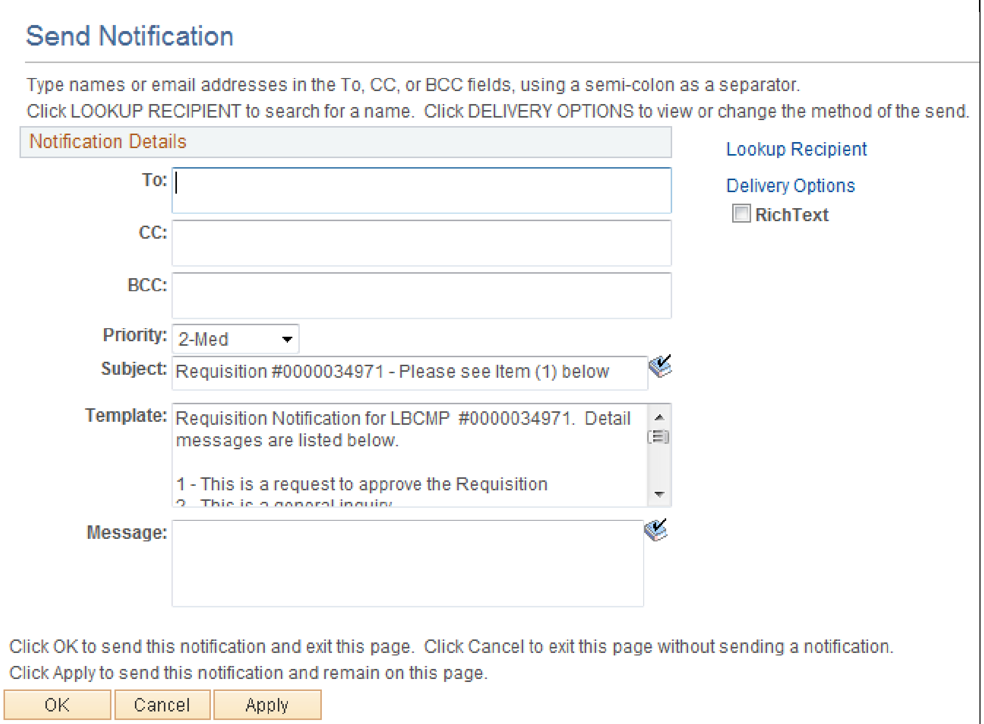
- Once the requisition has been converted into a PO the requisition will not be revisited. All change requests need to be made at the PO level. Please submit a PO change request or contact the Buyer with such requests.
- Reconciling Requisitions - The Procurement department will automatically cancel all Requisitions that are 90 days old and have a balance remaining. At year end all requisitions will be closed. This will result in the Requisitions Pre Encumbrance balance reducing to $0.00.

2.3 Notifications

The “Notify” button is used to generate a system message to another person, such as the approver or a buyer. For example Requestors approver may be notified using this feature to know the requisition is ready for approval.

<table>
<tr><th>Processing Steps / Field Name</th><th>Screenshot / Description</th></tr>
<tr><td>From the Requisition Main Page, select the Notify Button.</td><td>


</td></tr>
<tr><td>The Send Notification Page will display.

Enter the Information.</td><td>


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

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 recipient does not automatically populate, you must manually enter in the email address.
CC	Use the "Lookup Recipient" option to look up by last name,first name. If recipient does not automatically populate, you must manually enter in the email address.
BCC	Use the "Lookup Recipient" option to look up by last name,first name. If recipient does not automatically populate, you must manually enter in the email address. 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 only 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.

2.4 Requisition Approval (for non-requestors)

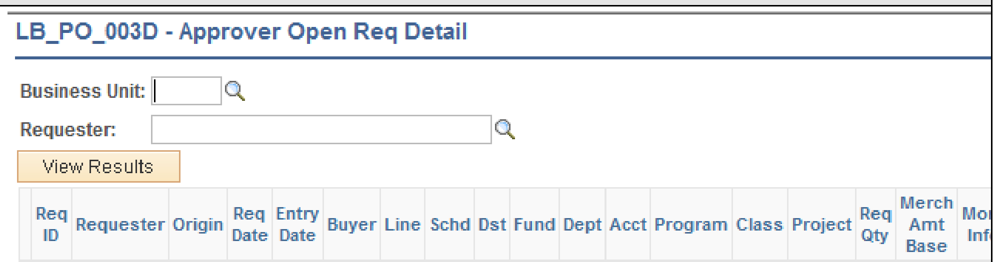
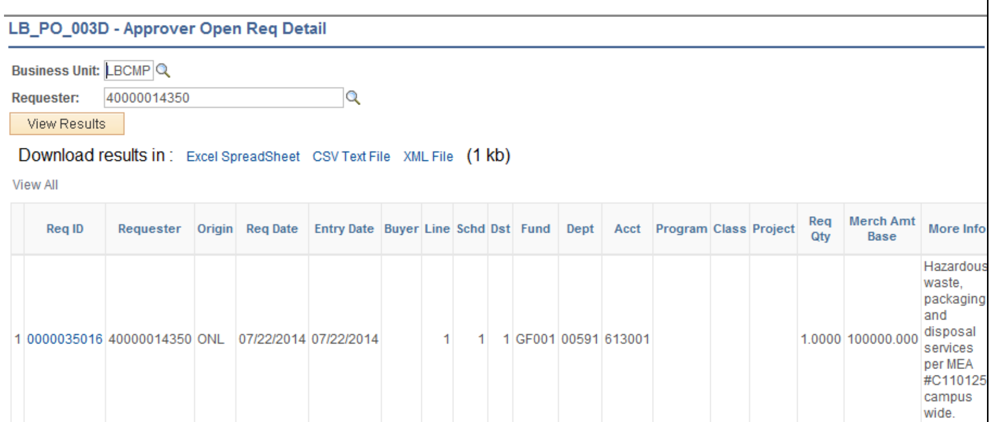
If the Requestor does not have Approval authority for Requisitions, the next step is to get the authorized approver to Approve and Budget Check the Requisition.

Once a requisition is entered, it must be approved before the Purchasing Department receives the requisition and creates the purchase order on behalf of the campus. Requisitions may be entered for any amount; however, the approver must have the appropriate Delegation of Authority level for the requisition to be processed.

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. Requisitions can be edited any time prior to Approval.

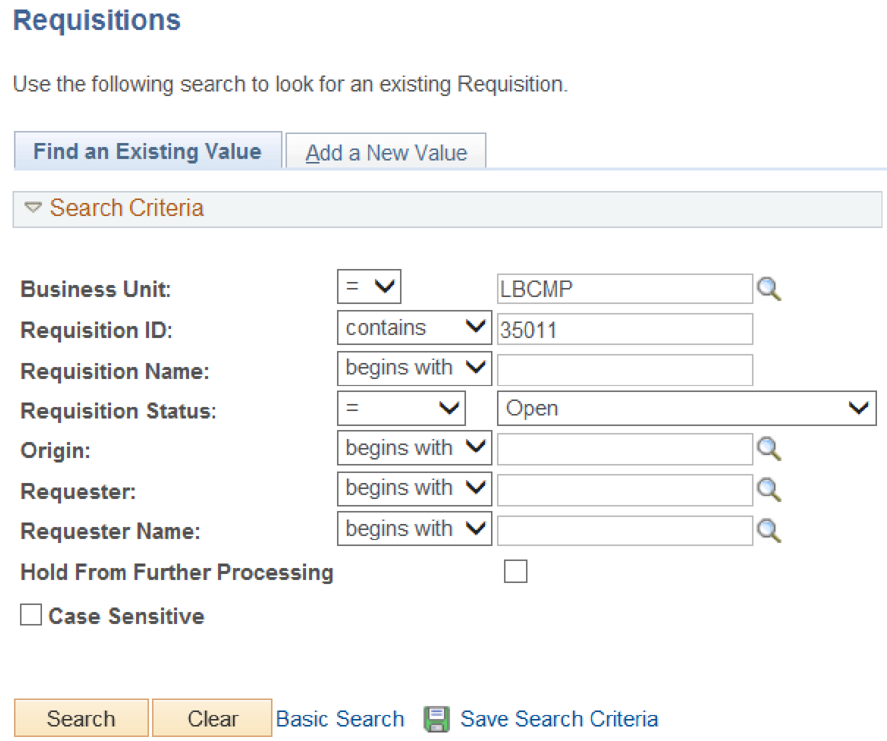
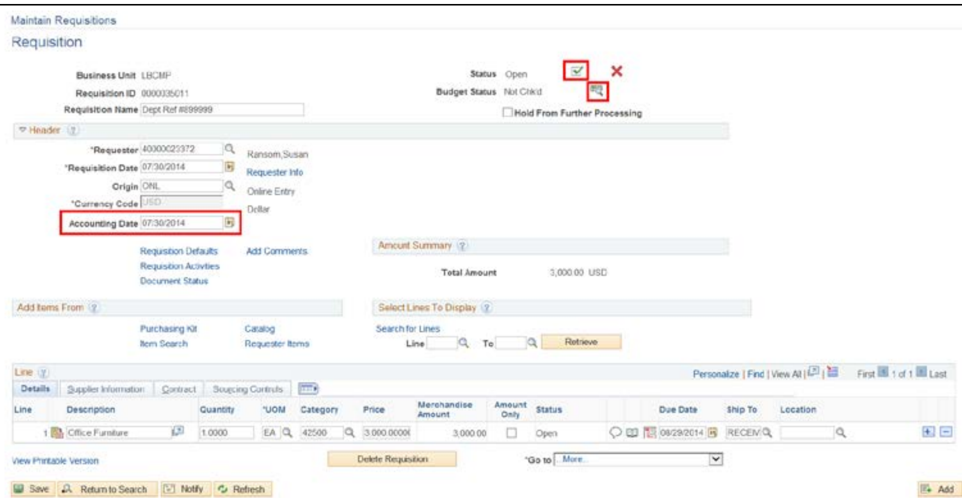
<u>Review the Requisition Lines and Distribution</u>

Navigation: Purchasing > Reporting Tools > 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: All requisitions and lines within the requisition will be displayed 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**" Alternative 1: Type in the last five digits of the requisition number preceded by a %. (Example: %17982) Alternative 2: Select contains from the drop-down value list and then type in the requisition number. Select "**Search**". Select the appropriate requisition by clicking on it.	
Verify the accounting date is within the same month as the date the requisition is being approved. 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**".	

3.0 Requisition Deletions

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

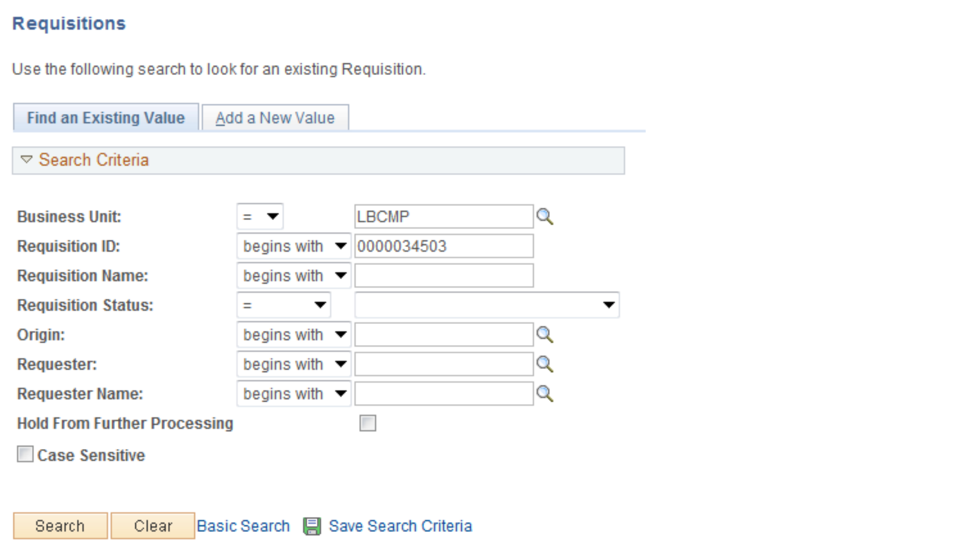
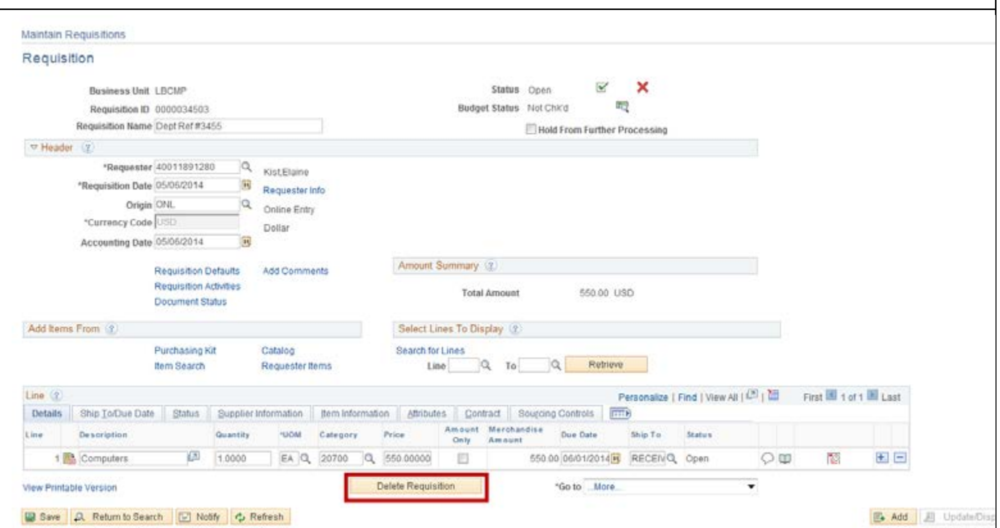
3.1 Deleting the Entire Requisition

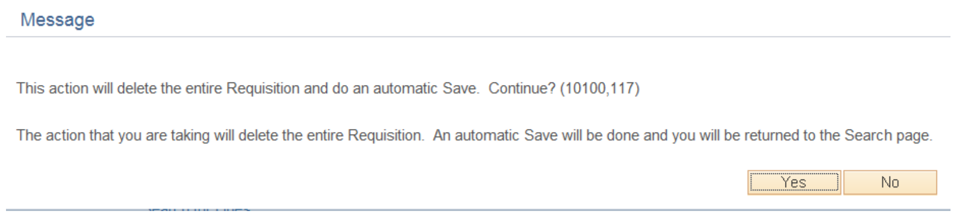
You can delete an entire requisition by selecting the Requisition Delete icon on the Requisitions page. To delete an entire requisition, the requisition must meet the following criteria:

- 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 just created the Requisition and have not navigated from the page, you must exit and then return to access the "Delete Requisition" button on the requisition.	

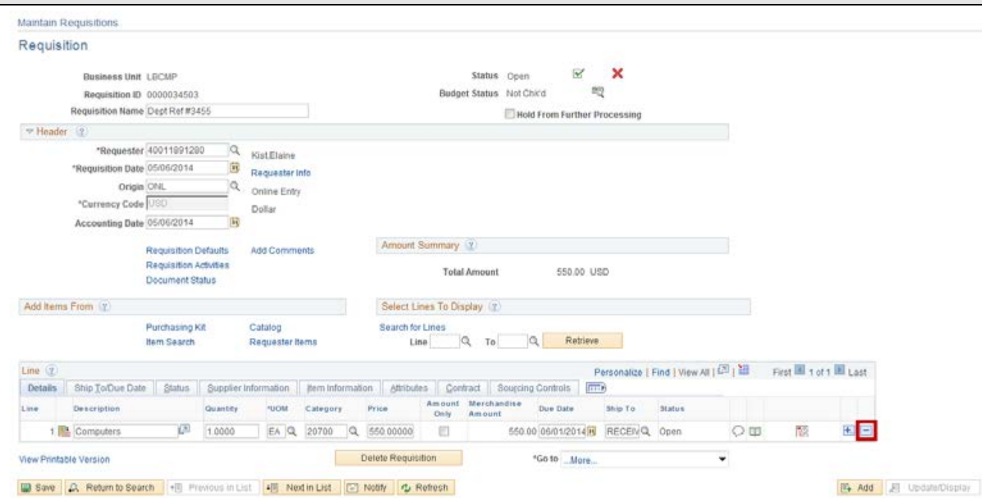
Processing Steps / Field Name	Screenshot / Description
You will receive a warning message. Select Yes if you are sure you want to Delete the Req.	

Once the Requisition is Deleted you can no longer view it in inquiry mode.

3.2 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.	

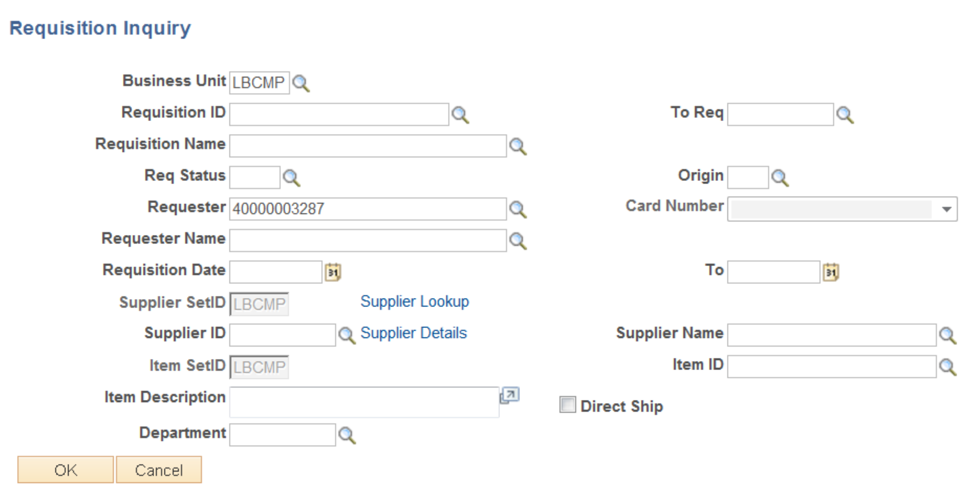
Note: Changes are not allowed on those Requisitions that have been approved, Budget checked, and Sourced to a Purchase Order. Please submit a change request using the **“Notify”** button on the purchase order if you have any updates after a requisition has been approved.

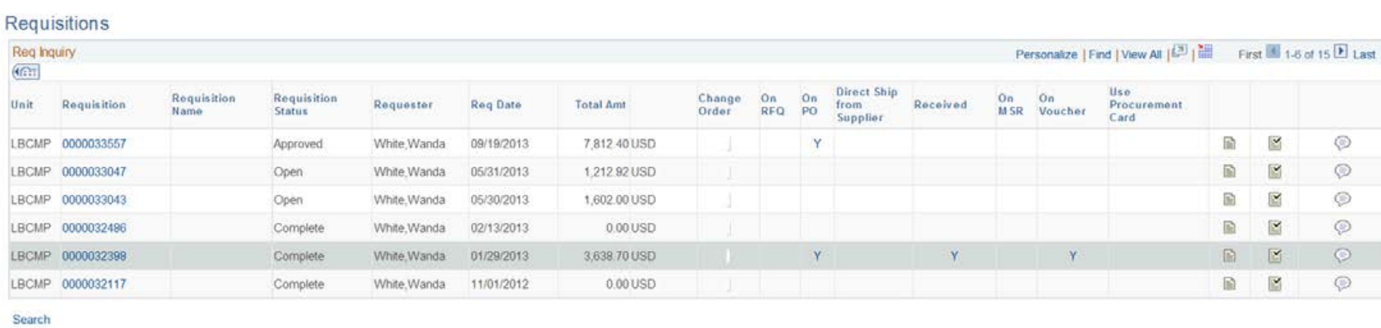
4.0 Requisition Inquiries

4.1 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 to a specific Department. This inquiry gives you line-by-line information for your requisitions, as well as provides access to pages that contain more details about the selected requisition.

Navigation: Purchasing > Requisitions > Review Requisition Information > 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 will be displayed. **Note:** For the Requester field, use "40" + 9 digit employee ID	



Requisitions

Req Inquiry

Personalize | Find | View All | First 1-6 of 15 Last

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card
LBCMP	0000033557		Approved	White,Wanda	09/19/2013	7,812.40 USD			Y					
LBCMP	0000033047		Open	White,Wanda	05/31/2013	1,212.92 USD								
LBCMP	0000033043		Open	White,Wanda	05/30/2013	1,602.00 USD								
LBCMP	0000032486		Complete	White,Wanda	02/13/2013	0.00 USD								
LBCMP	0000032398		Complete	White,Wanda	01/29/2013	3,638.70 USD			Y		Y		Y	
LBCMP	0000032117		Complete	White,Wanda	11/01/2012	0.00 USD								

Search

Field Name	Description
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.
On Voucher	Select the linked Y or P values to access the Requisition to Voucher List page.

Field Name	Description
	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.

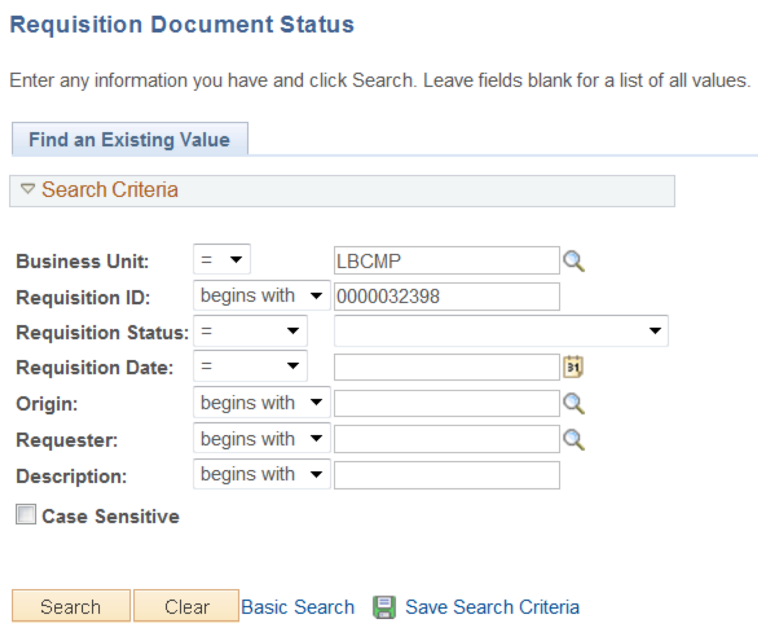
4.2 Document Status

This inquiry can be used to find out 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 item.

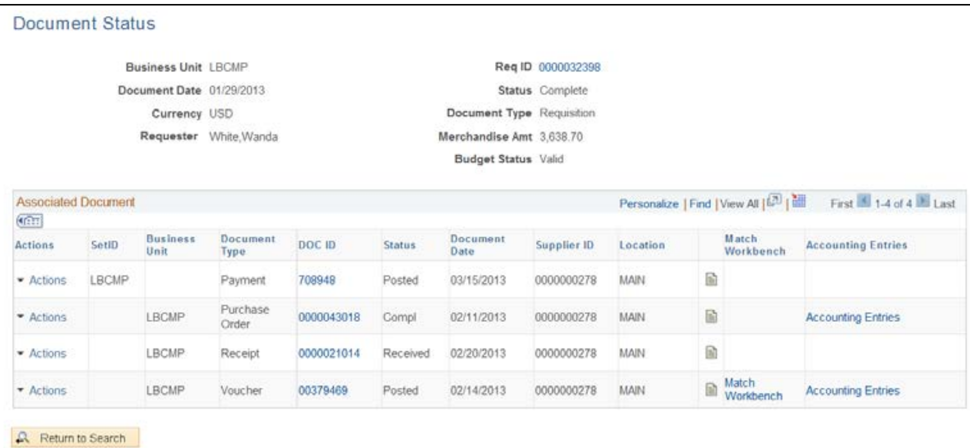
Navigation: Purchasing > Requisitions > Review Requisition Information > Document Status

<table>
<tr><th>Processing Steps / Field Name</th><th>Screenshot / Description</th></tr>
<tr><td>Enter criteria for selecting requisitions to view on the Document Status page.

Select “Search”.

Requisitions meeting the criteria will be displayed.</td><td>


</td></tr>
<tr><td>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.</td><td>


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

5.0 Print Requisition

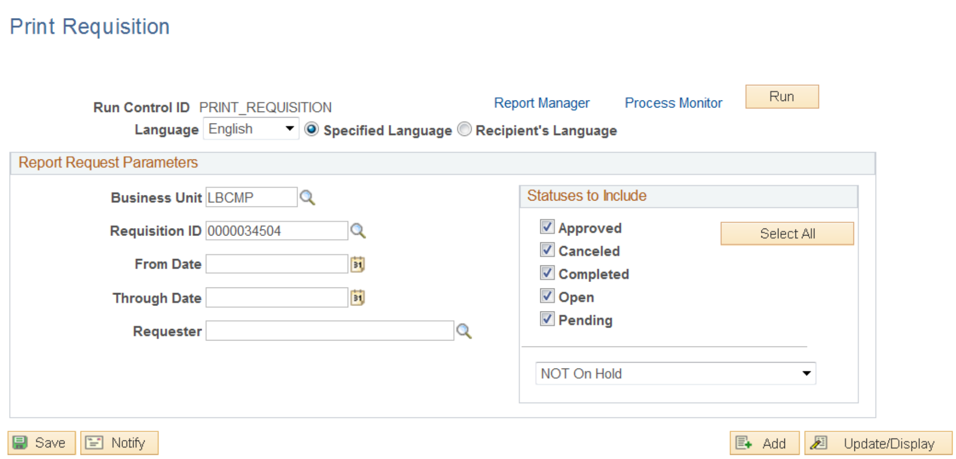
If you want to print a hard copy of your requisition, you would use the following steps. If you selected print from the requisition screen,

The following navigation is used to print requisition information:

Navigation: Purchasing > Requisitions > Reports > Print Requisition

<table>
<tr><th>Processing Steps / Field Name</th><th>Screenshot / Description</th></tr>
<tr><td>Create a Run Control or Search for an existing one to use.

Select:
• Business Unit
• Requisition ID
• All statuses

Select "Save"
Select "Run"</td><td>
</td></tr>
</table>

Report Example:

Requisition
CA State University Long Beach

Ship To: CSULB Receiving Department
1331 Palo Verde Avenue
Long Beach CA 90840-5801

Business Unit:	LBCMP	APPROVED
Req ID	Date	Page
0000034504	05/07/2014	1
Requester	Telephone	Entered By
Kist,Elaine		Kist,Elaine

Line-Schd-Dist / Distribution	Description / Account	Fund	Dept	Category	Quantity / Prgm	UOM / Class	Price / Project	Extended Amt	Due Date / Dist Amt
1-1	Computers			20400	1.0000	EA	1,400.00	1,400.00	06/15/2014
1-1-1	616002	GF001	00732						1,400.00

Line Total: 1,400.00

Total Requisition Amount: 1,400.00

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 req 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
Purchasing	Review Change Orders	Review Change Order history.	Purchasing > Purchase Orders > Manage Change Orders > Review 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
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
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 PO's 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 Equipmnet
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