

Reviewing Requisitions and/or Purchase Orders

Once a requisition is entered into the system it is easy to track the status of the document, whether it has or has not been converted into a Purchase Order. The primary method to view the information is to use the Document Status window. Other methods include the Requisition/PO Accounting Entries, Activity Summary (PO only), and CSU Remaining Balance Inquiry (PO Only) or just simply viewing an existing requisition or PO.

Document Status

Access the document status for a requisition and/or purchase order (PO) to view documents associated with the requisition and/or PO including receipts, vouchers and payments. Accounting entries can also be seen for a particular document.

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

Navigation for Purchase Order Document Status: Purchasing > Purchase Orders > Review PO Information > Document Status

1) On the tab labeled “Find an Existing Value”, populate desired fields to narrow the search.

a) Requisition options include

- i) Business Unit, select “**LBCMP**” (for Long Beach Campus).
- ii) Requisition ID
- iii) Requisition Status
- iv) Requisition Date
- v) Origin (if applicable)
- vi) Requestor
- vii) Description

b) PO Search Options include

- i) Business Unit, select “**LBCMP**” (for Long Beach Campus).
- ii) PO Number
- iii) Purchase Order Date
- iv) Origin

- v) Purchase Order Reference
- 2) Click “**Search**”.
 - 3) Results will display if more than one requisition/PO meets the search criteria. If only one requisition/PO meets the criteria, the Document Status window will open.
 - 4) The document status window will display the same fields available in the search step above. Additional fields displayed include Status (document), Budget Status, Currency, Amount, Buyer and all Associated Documents.
 - 5) To view all related information on the associated documents, select the “Related Info” or the small icon next to the tab which will display all of the documents and Related Info within one window.
 - a) Associated Documents may include the following. Clicking on any blue link will automatically link to the associated document.
 - i) Requisition
 - ii) Purchase Order
 - iii) Contract
 - iv) Receipt
 - v) Voucher
 - vi) Payment
 - b) Select Accounting Entries links to view more information on the chartfields associated with a particular encumbrance and/or payment.

CSU Remaining Balance

Navigation: Purchasing > Purchase Orders > Review PO Information > CSU PO Remaining Balance

- 1) To view the remaining encumbrance on a Purchase Order populate the PO Number field and then select “**Search**”.




Refer to the **CFS: Purchasing Reports** QRG to view the same information in a consolidated report format.

Accounting Entries

Navigation for Requisition Accounting Entries: Purchasing > Requisitions > Review Requisition Information > Accounting Entries

Navigation for Purchase Order Accounting Entries: Purchasing > Purchase Orders > Review PO Information > PO Accounting Entries

- 2) On the Selection Criteria window, narrow the search using the following fields:
 - a) Requisition options include
 - i) Business Unit, select “**LBCMP**” (for Long Beach Campus).
 - ii) From Req
 - iii) To Req
 - iv) Requisition Status
 - v) Fiscal Year From/To
 - vi) Chartfields
 - b) PO Search Options include
 - i) Business Unit, select “**LBCMP**” (for Long Beach Campus).
 - ii) From PO ID
 - iii) To PO ID
 - iv) PO Status
 - v) Fiscal Year From/To
 - vi) Chartfields
 - c) Select “**OK**”.
 - d) The requisition results will be visible in the window.
 - i) The Details tab shows the document ID, transaction type, account, monetary amount and fiscal year
 - ii) The Chartfields tab displays the accounting period, Fund and Dept ID.

iii) To view all key fields, select the All Columns icon  to the right of the Chartfields tab.

iv) Additional options for viewing results:

(1) Select “Customize” to customize the columns that display in the view.



Refer to **CFS: Customizing Requisition Settings** to streamline the requisition entry process.

(2) “Find” provides the option to search for a specific text string.

(3) “View All” will be selectable if there is more available records to view (typically more than 5 rows of data).

(4) The download icon creates a Excel spreadsheet with the data displayed.

Activity Summary

Navigation: Purchasing > Purchase Orders > Review PO Information > Activity Summary

The activity summary displays the quantity of goods received and the amount invoiced/un-invoiced.

- 1) Enter search criteria (usually purchase order number).
- 2) Select “Search”.
- 3) Select the Detail tab to show specific items ordered and quantity.
- 4) Select the Receipt tab to view the quantity received.
- 5) Select the Invoice tab to show the amount invoiced and paid.
- 6) The Matched tab is a combination of the items that have been received and also paid.

View Requisition/Purchase Order Information

Navigation for Requisition Review: Purchasing > Requisitions > Review Requisition Information > Requisitions



Navigation for Purchase Order Review: Purchasing > Purchase Orders > Review PO Information > Purchase Orders

- 1) Enter search criteria.
- 2) Select “OK” when searching for requisitions and select “Search” when reviewing POs.

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- 3) A non-editable version of the requisition or PO will display. Additional data is available when selecting the links such as Vendor Details, Header Details, and Document Status.
- 4) To view chartfields, select, the Schedule icon  and then the Distribution/Chartfields  icons. (Use the “Return To Main Page” link to navigate back)