Online Requisition

CFS 9.2 User Guide

Revision Control

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Date	By	Action	Pages
	Lacey Lovejoy		
	Valerie Patschak		

Contents

1.0 CFS Online Requisitions Overview

Introduction

This guide is designed to provide the end-user with step-by-step information to successfully enter requisitions using the PeopleSoft Purchasing module in CI Financials (CFS).

In this training guide you learn how to:

- Enter a requisition

- Submit a requisition for approval

- Review existing requisitions

- Cancel a requisition

- Run requisition inquiries to view requisition information

For CI Financials or training related questions, please contact:

Financial Systems

Email: FinancialSystems@csuci.edu

Phone: (805) 437-8593 or (805) 437-3229

For purchasing related questions, please contact:

Email: Purchasing@csuci.edu

Phone: (805) 437-8592

Requisition Overview

Requisitions are entered using the PeopleSoft Purchasing module in CI Financials by authorized users to request goods and/or services for their department. When a requisition is created, the user must contact the person with delegated authority to approve the requisition. Once the requisition is approved and budget checked in the system overnight, Procurement and Logistical Services will assign a buyer who will review and convert the requisition into a purchase order.

To enter a requisition, an employee must have an Online RGS (Request for Goods and Services) Request form on file with Financial Systems and have a user account in CI Financials. Online RGS Request form can be found at http://www.csuci.edu/financial-services/system-support.htm. To request CI Financials access, an online request must be submitted requesting "CI UTL Fin User" role in the CI Records PSAR process by a manager.

Training is required for this role. Financial Systems will schedule training with all new Requesters once forms are received.

Online Requisitions and Approval Process – Quick Guide

Requester Steps

1. Sign into myCI portal and click on CI Financials

2. Create new requisition

   a. Navigation: Purchasing > Requisitions > Add/Update Requisitions

3. Save the requisition and write down the Requisition ID

4. Notify approver

Approver Steps
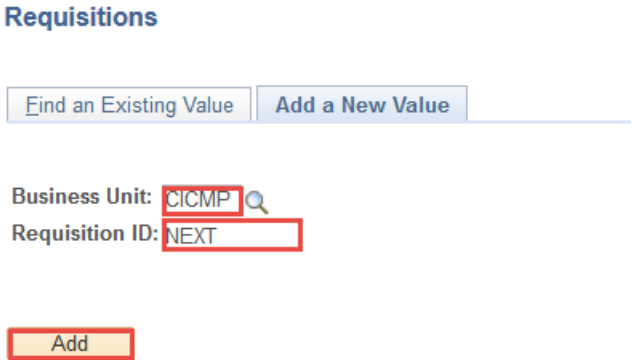
1. Sign into myCI portal and click on CI Financials

2. Look up requisition

   a. Navigation: Purchasing > Requisitions > Add/Update Requisitions - "Find An Existing Value" Tab

3. Enter 10 digit Requisition ID in the Requisition ID field

4. Click search

5. Review requisition for accuracy

   a. Change options

      i. Request requester to make the necessary changes

      ii. As approver, make the necessary changes

6. Click green checkmark at the top right of the page to approve requisition

7. Click Save

> **After the requisition is approved, it will be budget checked overnight. Procurement will be able to process the requisition the following business day. If you have a rush request, please contact Procurement.**
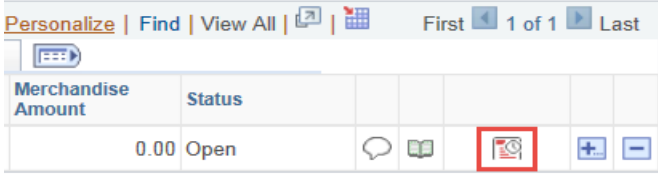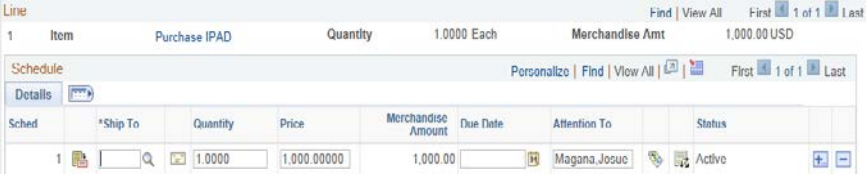
2.0   Creating a Requisition

The requisition entry page allows authorized requesters to create requisitions directly into the Purchasing Module. **Please ensure that you are creating the requisition for the proper business unit.**
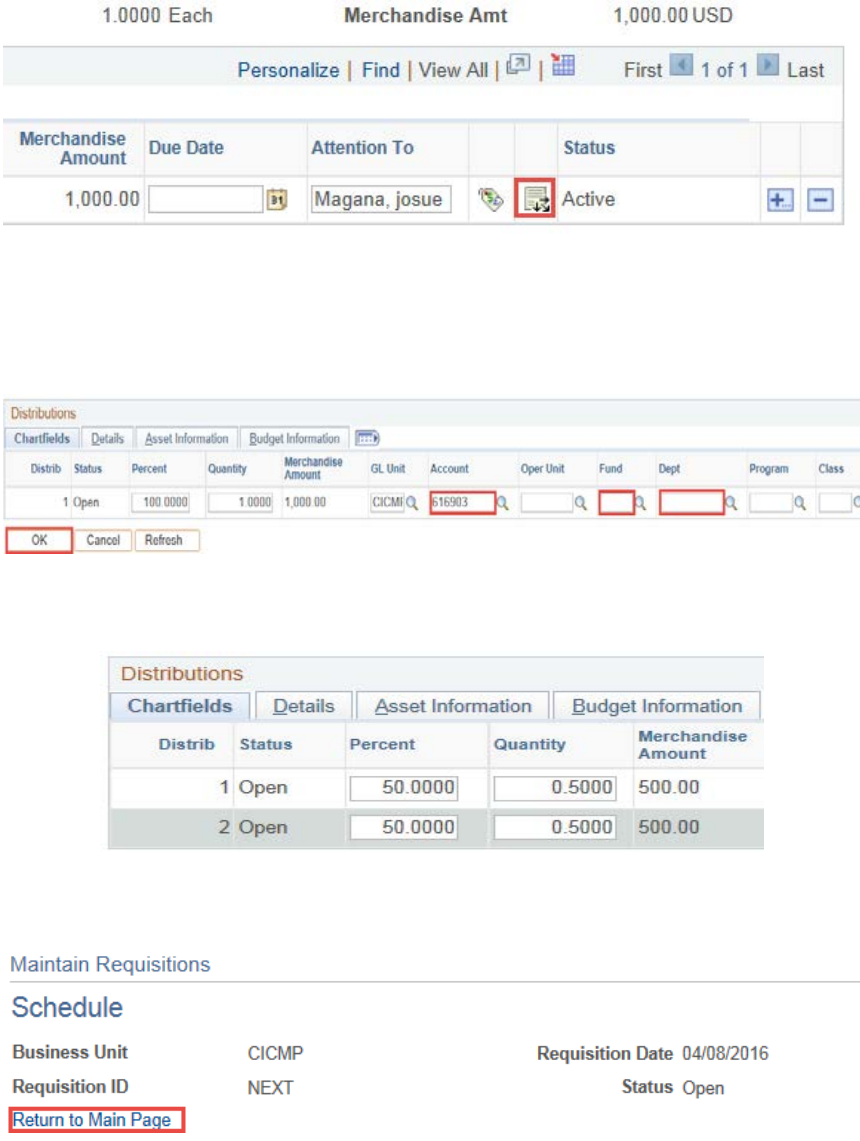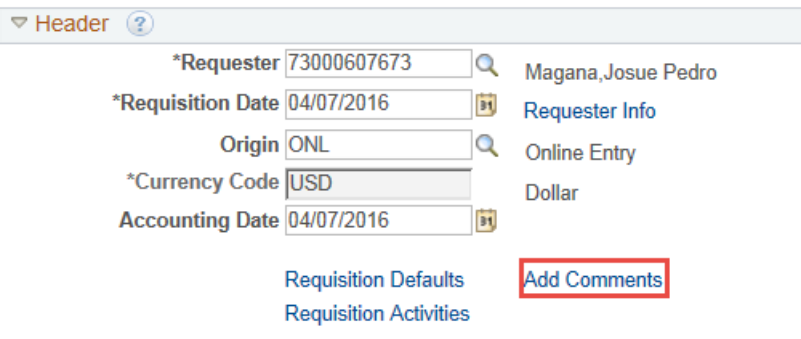
Navigation: Purchasing > Requisitions > Add/Update Requisitions – "Add a New Value" Tab

Processing Steps	Screenshot
• **Business Unit **** - Enter or click on 🔍 and select the appropriate business unit • **Requisition ID -** Do NOT change this field • Click Add **** If you need access to additional business units, please contact Financial Systems**	**Requisitions** [Find an Existing Value] [**Add a New Value**] Business Unit: CICMP 🔍 Requisition ID: NEXT [Add]

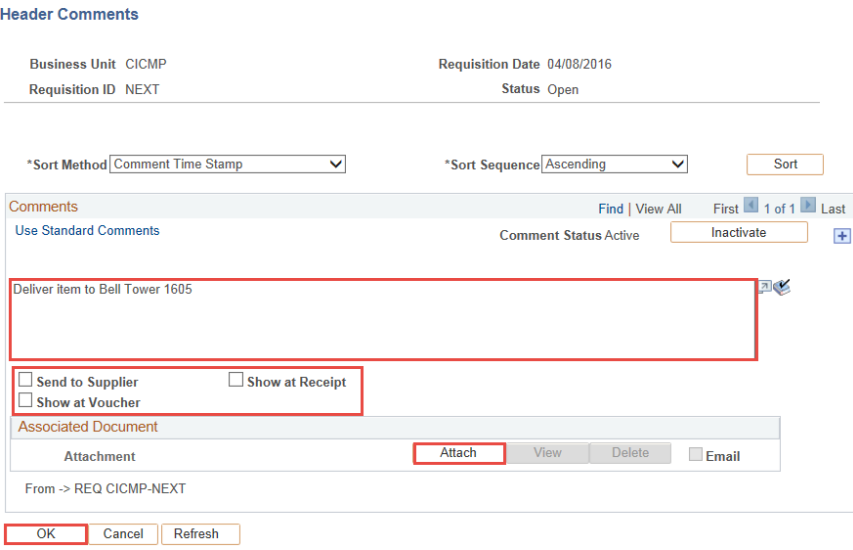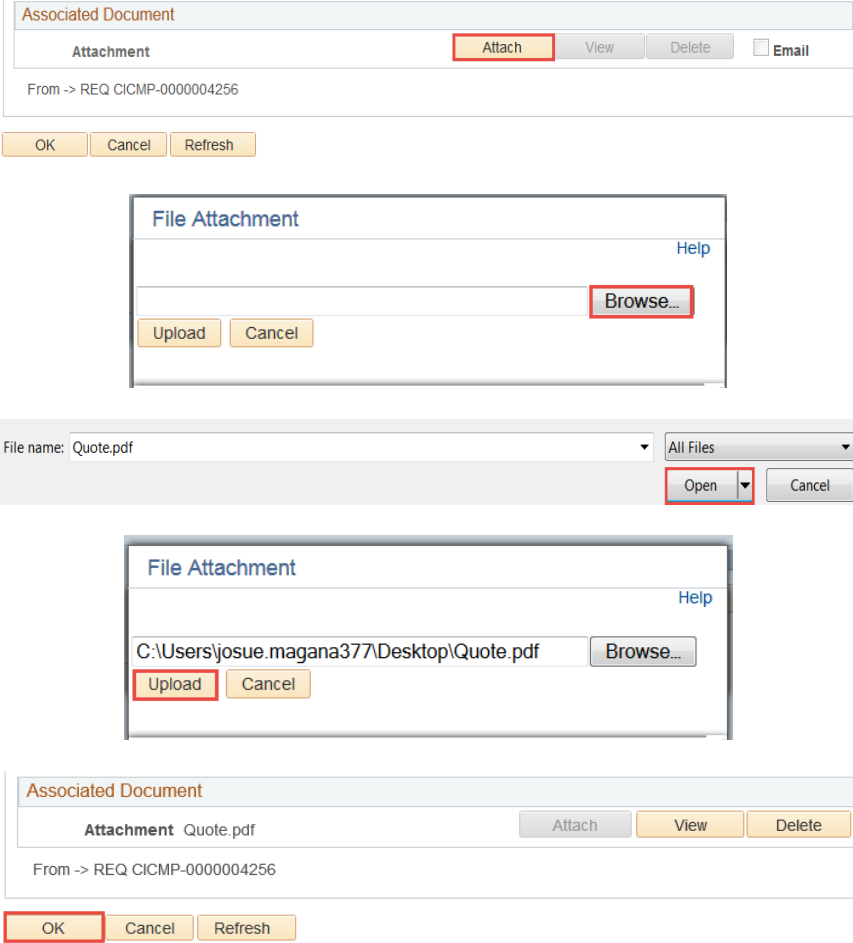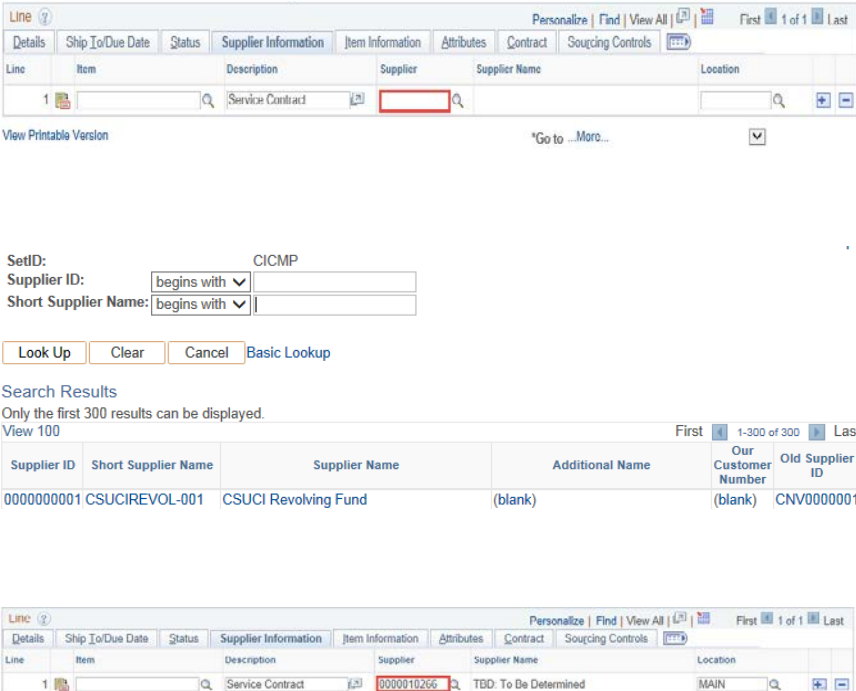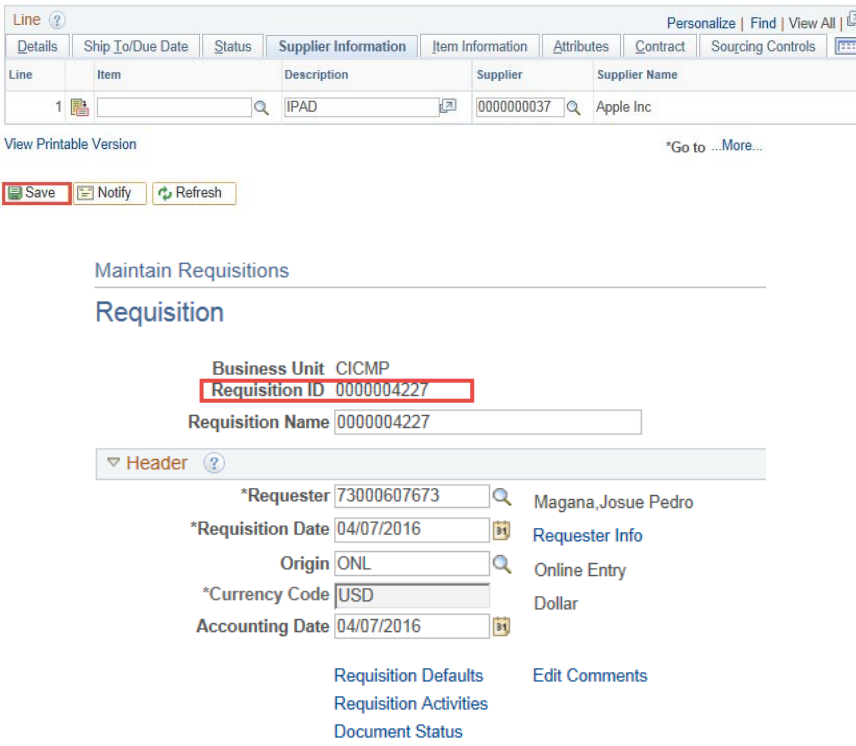| Processing Steps	Screenshot
Header Info • **Requisition Name -** not required. If not enter a Requisition Name, the system will use the Requisition ID • **Requester -** information defaults • **Requisition and Accounting Date** default to today's date. Dates are only changed for New Year requisitions. • Origin - Enter **ONL**	Maintain Requisitions Requisition Business Unit CICMP Requisition ID NEXT Requisition Name [_____] Copy From ▽ Header (?) *Requester 73000607673 🔍 Magana,Josue Pedro *Requisition Date 04/07/2016 📅 Requester Info Origin ONL 🔍 Online Entry *Currency Code USD Dollar Accounting Date 04/07/2016 📅 Requisition Defaults Add Comments Requisition Activities
Requisition Line – Detail Tab Complete the following fields: • **Item Field **** – Leave Blank • **Description** – 30 characters max • **Quantity** – Enter requesting quantity for each line. If you are requesting a service, enter the price per line here. • **UOM –** Enter correct UOM from Appendix B • **Category***** – Enter code best matching purchase. Account code will default based on category • **Price** – Enter price per unit. Service price will be $1.00 To add a row, click on plus sign [+] to add rows. To remove a row, click on the minus sign [−] ** To hide this field, see Appendix C. *** List of category codes and account numbers, see Appendix A	Line (?) Personalize	Find	View All	🔲	🔲 First 🔲 1 of 1 🔲 Last Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	🔲 Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status 1 🔳 [_____] 🔲	🔳 0.0000	[__] 🔍	[___] 🔍	[__] 0	0.00 Open 💬 📖 📷 ➕ ➖

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Processing Steps	Screenshot
Requisition Schedule Information • Click on the Schedule icon at the far right of the Requisition Line	Personalize | Find | View All | ⧉ | ⧮ First ◀ 1 of 1 ▶ Last | Merchandise Amount	Status					
---	---	---	---	---	---	---
0.00	Open	💬	📖	📅	➕	➖	

Complete the following fields:
 	
• **Ship To** – Select location
 	
    o **RECEIVING** - received at the warehouse
 	
    o **NA** – location for services and other items not shipped
 	
• **Attention To** – If needed, change to different person
 	
All other fields are to be updated on Requisition Line Info page
	Line Find | View All First ◀ 1 of 1 ▶ Last
	1 Item Purchase IPAD Quantity 1.0000 Each Merchandise Amt 1,000.00 USD
	Schedule Personalize | Find | View All | ⧉ | ⧮ First ◀ 1 of 1 ▶ Last
	Details
	Sched | *Ship To | Quantity | Price | Merchandise Amount | Due Date | Attention To | Status
	1 | 🔍 | 1.0000 | 1,000.00000 | 1,000.00 | 📅 | Magana,Josue | Active | ➕ ➖

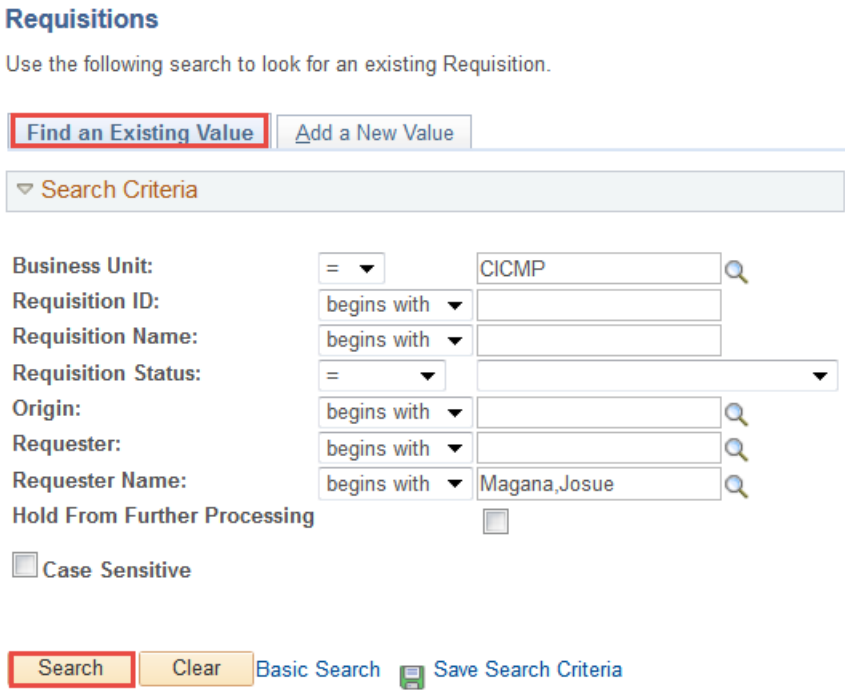| Processing Steps	Screenshot
Requisition Distribution Information Click on the Distribution icon on the Requisition Schedule page Complete the following fields: • **Percent** – defaults 100% from requisition line. If split distribution is needed, click on the plus sign ➕ and adjust the percent field per line. • **Quantity** • **Amount** • **GL Unit** • ***Account** – Default from category code • ***Fund** • ***Dept** • **Class** • **Project** Click OK Click Return to Main Page * **required fields.**	1.0000 Each Merchandise Amt 1,000.00 USD Personalize | Find | View All | 📷 | 🏢 First ◀ 1 of 1 ▶ Last 	Merchandise Amount	Due Date	Attention To		Status		
---	---	---	---	---	---	---
1,000.00		Magana, josue		Active	➕	➖ | **Distributions** Chartfields | Details | Asset Information | Budget Information | Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class
---	---	---	---	---	---	---	---	---	---	---	---
1	Open	100.0000	1.0000	1,000.00	CICMP	616903						 OK Cancel Refresh **Distributions** Chartfields | Details | Asset Information | Budget Information 	Distrib	Status	Percent	Quantity	Merchandise Amount
---	---	---	---	---
1	Open	50.0000	0.5000	500.00
2	Open	50.0000	0.5000	500.00	 **Maintain Requisitions** **Schedule** Business Unit CICMP Requisition Date 04/08/2016 Requisition ID NEXT Status Open Return to Main Page
Add Comments and Attach Quote On Header section: • Click Add Comments	▽ Header ❓ *Requester 73000607673 🔍 Magana,Josue Pedro *Requisition Date 04/07/2016 📅 Requester Info Origin ONL 🔍 Online Entry *Currency Code USD Dollar Accounting Date 04/07/2016 📅 Requisition Defaults Add Comments Requisition Activities

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Processing Steps	Screenshot
Add Comment • Enter comments as needed for Supplier, Purchasing, Shipping & Receiving, and Accounts Payable • Check appropriate boxes for comments to be shared	**Header Comments** Business Unit CICMP Requisition Date 04/08/2016 Requisition ID NEXT Status Open *Sort Method Comment Time Stamp *Sort Sequence Ascending Sort Comments Find | View All First ◄ 1 of 1 ► Last Use Standard Comments Comment Status Active Inactivate ＋ Deliver item to Bell Tower 1605 ☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher Associated Document Attachment Attach View Delete ☐ Email From -> REQ CICMP-NEXT OK Cancel Refresh

Attach Quote
 	
• Click on Attach
 	
• Click on Browse
 	
• Navigate to the file location, select the file and click "Open"
 	
• Click Upload
 	
• Click **OK** when done
	Associated Document
	Attachment Attach View Delete ☐ Email
	From -> REQ CICMP-0000004256
	
	OK Cancel Refresh
	
	File Attachment Help
	    Browse...
	Upload Cancel
	
	File name: Quote.pdf All Files
	    Open ▾ Cancel
	
	File Attachment Help
	C:\Users\josue.magana377\Desktop\Quote.pdf Browse...
	Upload Cancel
	
	Associated Document
	Attachment Quote.pdf Attach View Delete
	From -> REQ CICMP-0000004256
	
	OK Cancel Refresh

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Processing Steps	Screenshot
Requisition Line – Supplier Information On Requisition line, select supplier information tab Complete the following fields: • **Supplier *** - Click on magnifying glass 🔍 to see the list of active suppliers. Select the appropriate supplier per requisition line * If wanted Supplier is not in the system, Supplier must have a completed CI Vendor 204 Payee Data Record Packet on file. Forms are located at http://www.csuci.edu/procurement/forms.htm	
Save Requisition On Maintain Requisition Page: • Click Save Requisition ID is generated At least one Line must be completely filled out in order to save. After saving, you can continue to add more Lines to your requisition.	

3.0 Find Existing Requisition

The Find an Existing Value tab is used to locate an existing requisition to review or update.
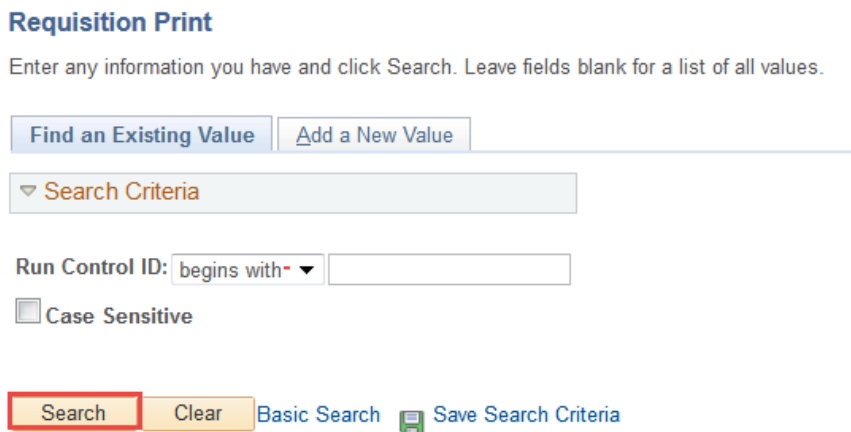
Navigation: Purchasing > Requisitions > Add/Update Requisitions – "Find an Existing Value" Tab

Processing Steps	Screenshot

• Click on the "Find an Existing Value" tab
 	
• Enter the appropriate Business Unit
 	
• Fill out known fields to limit search results
 	
    o Requisition ID
 	
    o Requester - CI users start with 73
 	
    o Requester Name
 	
• Click Search
	Requisitions
	Use the following search to look for an existing Requisition.
	
	Find an Existing Value Add a New Value
	
	▽ Search Criteria
	
	Business Unit: = CICMP
	Requisition ID: begins with
	Requisition Name: begins with
	Requisition Status: =
	Origin: begins with
	Requester: begins with
	Requester Name: begins with Magana,Josue
	Hold From Further Processing ☐
	
	☐ Case Sensitive
	
	Search Clear Basic Search 💾 Save Search Criteria

4.0   Sending Requisition for Approval

Once a requisition is completed and saved, the requester will notify the approver. There are two ways for an approver to be notified: personal notification via email, IM, sticky note, or verbally, or have CFS send the notification.

Navigation: Purchasing > Requisition > Reports > Print Requisition

Processing Steps	Screenshot
CFS Notification Navigate to Requisition Print page: • Click Search for available *Run Control IDs • Select Run Control ID * If no Run Control IDs are available, a Run Control ID must be created.	**Requisition Print** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Add a New Value ▽ Search Criteria Run Control ID: begins with ▾ [ ] ☐ Case Sensitive Search Clear Basic Search 💾 Save Search Criteria
To create a new Run Control ID: • Click Add a New Value Tab • Enter a Run Control ID* • Click Add * Run Control IDs cannot contain spaces A Run Control ID saves the request parameters and setting to be used again. Once you have created a Run Control ID, search for it under the Find an Existing Value tab.	**Requisition Print** Find an Existing Value **Add a New Value** Run Control ID: Req_Approval Add

Print Requisition page:
 	
Enter/update the following information:
 	
• Business Unit
 	
• Requisition ID
 	
• Check all Statuses to Include boxes
 	
• Click Run
 	
Process Scheduler Request page:
 	
• **Type** - Select Email
 	
• **Format** – Select PDF
 	
• Click Distribution
	Print Requisition
	
	Run Control ID Req_Approval Report Manager Process Monitor Run
	    Language English ◉ Specified Language ○ Recipient's Language
	
	Report Request Parameters
	    Business Unit CICMP **Statuses to Include**
	    Requisition ID 0000004227 ☑ Approved Select All
	    From Date ☑ Canceled
	    Through Date ☑ Completed
	    Requester ☑ Open
	                          ☑ Pending
	                        NOT On Hold
	
	Process Scheduler Request
	    User ID: 73000607673 Run Control ID: Req_Approval
	    Server Name: Run Date: 04/11/2016
	    Recurrence: Run Time: 9:44:44AM Reset to Current Date/Time
	    Time Zone:
	Process List
	Select Description Process Name Process Type *Type *Format Distribution
	☑ Requisition Print SQR PORQ010 SQR Report Email PDF Distribution

Distribution Detail page: Enter/update the following information: • **Email Subject** • **Message Text** • **Email Address List*** - Approver's email address (separate with semicolon) • **ID Type*** – Select User • **Distribution ID*** – Approver's user ID Click **OK** * Either manually enter approver's email address **OR** search for approver and enter User ID under Distribution ID. **Both are not required.** * CI user IDs start with 73 followed by 9-digit employee ID number	**Distribution Detail** Process Name: PORQ010 Process Type: SQR Report Folder Name: Retention Days: 45 **Email Only** Email Subject: Email With Log: ☐ Email Web Report: ☐ Approval Needed: Requisition #0000004227 Message Text: Enter text describing the purchase requested. Email Address List: josue.magana@csuci.edu **Distribute To** *ID Type *Distribution ID User 73000607673 🔍 ➕ ➖ User 🔍 ➕ ➖ OK Cancel

Click **OK** An email including an attachment of the requisition will be sent to the requester and approver.	**Process Scheduler Request** User ID: 73000607673 Run Control ID: Req_Approval Server Name: [____▼] Run Date: 04/11/2016 Recurrence: [____▼] Run Time: 9:44:44AM [Reset to Current Date/Time] Time Zone: [___🔍] **Process List** Select Description Process Name Process Type *Type *Format Distribution ☑ Requisition Print SQR PORQ010 SQR Report [Email ▼] [PDF ▼] Distribution [OK] [Cancel]

5.0   Canceling a Requisition

In order to cancel a requisition, please contact Purchasing.

Email: Purchasing@csuci.edu

Phone: (805) 437-8592

6.0   Review Requisition and More Information

This is the most commonly used inquiry page to find out whether a Requisition has been approved, sourced into a Purchase Order, has been received, or has been paid.

Navigation: Purchasing > Requisitions > Review Requisition Information > Requisitions

Processing Steps	Screenshot
Requisition Inquiry page: Enter the following: • Business Unit • Requisition ID Click OK	**Requisition Inquiry** Business Unit CICMP Requisition ID 0000004227 To Req 0000004227 Requisition Name Req Status Origin Requester Card Number Requester Name Requisition Date To Supplier SetID CICMP Supplier Lookup Supplier ID Supplier Details Supplier Name Item SetID CICMP Item ID Item Description ☐ Direct Ship Department OK Cancel
Under Details tab: Requisition Status of "Open" have not been approved **Under Status tab:** **On PO** = Y, PO has been created **Received** = Y, Item has been received **On Voucher** = Y, voucher has been created Blank fields mean there is no activity. To see requisition approval information, click on the 🗹 icon.	Requisitions Req Inquiry Personalize | Find | View All | First 1 of 1 Last **Details** Status Unit | Requisition | Requisition Name | Requisition Status | Requester | Req Date | Total Amt CICMP | 0000004227 | 0000004227 | Open | Magana,Josue Pedro | 04/07/2016 | 500.00 USD Search Notify Requisitions Req Inquiry Personalize | Find | View All | Details Status Unit | Requisition | Requisition Name | Change Order | On RFQ | On PO | Direct Ship from Supplier | Received | On MSR | On Voucher | Use Procurement Card CICMP | 0000004098 | BIOPAC-PSY | | | Y Requisitions Req Inquiry Personalize | Find | View All | First Details Status Unit | Requisition | Requisition Name | Change Order | On RFQ | On PO | Direct Ship from Supplier | Received | On MSR | On Voucher | Use Procurement Card CICMP | 0000004227 | 0000004227 Search

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7.0 Appendix A: Category Codes

Category codes are used to further define the item or service being purchased. Each Category code is linked to a specific Account code chartfield. Be sure to select the category code that contains the Associated Account code you want to expense from.

Category Code	Name	Associated Account	Description
02500	AIR COMPRESSORS ACC	619902	Furniture/Equipment Under $5k
03100	HVAC PARTS	660827	Repairs
03700	ENTERTAINMENT, MISC	660820	Business Meals/Hospitality
04000	ANIMALS/LIVE	660003	Supplies and Services - Other
04500	APPLIANCES, HOUSEHOLD	619902	Furniture/Equipment Under $5k
05500	AUTO ACCESSORIES	660877	Parts
06000	AUTO PARTS	660877	Parts
06003	ANTIFREEZE	660851	Maintenance
08500	BAGS/BAGGING/EROSION EQUIP	660003	Supplies and Services - Other
11500	BIOCHEMICALS/ RESEARCH	619901	Instructional Equip Under $5k
12000	BOAT/MTR/MARINE/WLDLIFE SUPL	660003	Supplies and Services - Other
12500	BOOKBINDING SUPPLIES	608001	Library Books
15500	BUILDINGS/STRUCTURES	660827	Repairs
16500	CAFETERIA/KITCHEN EQUIP, COM	619902	Furniture/Equipment Under $5k
17500	CHEM LAB EQUIP/SUPL	619901	Instructional Equip Under $5k
19300	LAB REAGENTS TESTS	619901	Instructional Equip Under $5k
20000	CLOTHING/ATHLETIC/UNIFORMS	660815	Clothing and Safety Equipment
20400	COMPUTER HRDWR & MICRO PERIPH	616903	Desk/Lap/Peripherals Under $5k
20460	MONITORS	616903	Desk/Lap/Peripherals Under $5k
20600	COMPUTER-MAINFRAME & PERIPH	616904	Servers/Peripherals Under $5k

20700	COMPUTER ACCESSORIES/SUPPLIES	616903	Desk/Lap/Peripherals Under $5k
20800	COMPUTER SOFTWARE, MICRO	616905	Software Under $5k
22000	RECORDING/MEASURING INSTRUMNTS	619902	Furniture/Equipment Under $5k
25500	DECALS STAMPS	660003	Supplies and Services - Other
26500	DRAPERIES/CURTAINS/UPHOLSTERY	660003	Supplies and Services - Other
28000	ELECTRICAL CABLES WIRES	660827	Repairs
28545	PROJECTOR LAMPS	619902	Furniture/Equipment Under $5k
29500	ELEVATORS ESCALATORS, BLDG	660827	Repairs
31000	ENVELOPES	660002	Printing
31800	FARE COLLECTION EQUIP SUPL	619902	Furniture/Equipment Under $5k
33500	FERTILIZERS SOIL CONDITIONER	660003	Supplies and Services - Other
33569	RECYCLED COMPOST	660003	Supplies and Services - Other
34000	FIRE PROTECTION, EQUIP SUPL	619902	Furniture/Equipment Under $5k
34500	FIRST AID EQUIP/SUPPLIES	619902	Furniture/Equipment Under $5k
35000	FLAGS ACCESSORIES	660003	Supplies and Services - Other
37000	FOOD PROCESSING EQUIP SUPL	619902	Furniture/Equipment Under $5k
40500	FUEL	605809	Fuel - Usage
40587	RECYCLED PETROLEUM/OIL	605090	Other Utilities
41000	FURNITURE - HOSPITAL	619902	Furniture/Equipment Under $5k
41500	FURNITURE - LABORATORY	619801	Furniture/Equipment over $5K
42000	FURNITURE/CAFI/LIBRARY/DORM	619902	Furniture/Equipment Under $5k
42500	FURNITURE - OFFICE	619902	Furniture/Equipment Under $5k
43000	GASES/LABORATORY	660003	Supplies and Services - Other
43500	GERMICIDES/CLEANERS-MISC	660003	Supplies and Services - Other
45000	HARDWARE: MISC	660827	Repairs

46500	HOSPITAL/SURGICAL, EQUIP SUP	619902	Furniture/Equipment Under $5k
47500	HOSPITAL/MEDICAL ACCESSORIES	660003	Supplies and Services - Other
48500	JANITORIAL SUPPLIES	660003	Supplies and Services - Other
49000	LAB EQUIP ACCESSORIES-GENERAL	619901	Instructional Equip Under $5k
49300	LAB EQUIP ACCESSORIES-CHEMICAL	619901	Instructional Equip $5k
49500	LAB EQUIP SUPPLIES-BIOLOGY	619901	Instructional Equip Under $5k
51500	LAWN MAINTENANCE EQUIP SUPL	619902	Furniture/Equipment Under $5k
52500	LIBRARY EQUIP/SUPPLIES	619902	Furniture/Equipment Under $5k
55000	TRAFFIC CNTRL/MARKERS/PLACARDS	660003	Supplies and Services - Other
55500	MARKING STENCILING DEVICES	660827	Repairs
56000	MATL HANDLING/STORAGE EQUIP	619902	Furniture/Equipment Under $5k
57800	MISCELLANEOUS PRODUCTS	660003	Supplies and Services - Other
58000	MUSICAL INSTRUM/ACC SUPL	660003	Supplies and Services - Other
59500	NURSERY STOCK/EQUIP SUPL	619902	Furniture/Equipment Under $5k
60000	OFFICE MACHINES/EQUIP ACC	619902	Furniture/Equipment Under $5k
61099	PAPER PRODUCT, NON-RECYCLED	660826	Office Supplies
61500	OFFICE SUPPLIES/ GENERAL	660826	Office Supplies
62000	ERASERS/INKS/LEADS/PENS/PENCIL	660826	Office Supplies
62500	OPTICAL EQUIP/ACC SUPL	619901	Instructional Equip Under $5k
63000	PAINT RELATED PRODUCTS	660827	Repairs
63079	RECYCLED PAINTS	660827	Repairs
63500	PAINTING EQUIP ACC	619902	Furniture/Equipment Under $5k
64066	RECYCLED PAPER PRODUCTS	660826	Office Supplies
64500	PAPER FOR OFFICE PRINTING	660826	Office Supplies
64599	RECYCLED PAPER; OFFICE, PRNTNG	660826	Office Supplies

65000	PARK/RECREATIONAL/POOL EQUIP	619902	Furniture/Equipment Under $5k
65500	PHOTOGRAPHIC EQUIP SUPL	619902	Furniture/Equipment Under $5k
65800	PIPE TUBING	660827	Repairs
65900	PIPE TUBING FITTINGS	660827	Repairs
67000	PLUMBING EQUIP/FIXTURES SUPL	660827	Repairs
68000	POLICE EQUIP SUPL	619902	Furniture/Equipment Under $5k
69000	POWER GEN EQUIP/ACC SUPL	619902	Furniture/Equipment Under $5k
71500	PUBLICATIONS/AUDIOVISUAL MATL	660003	Supplies and Services - Other
72000	PUMPING EQUIP ACCESSORIES	619902	Furniture/Equipment Under $5k
72500	TELECOM/RADIO/PHONE EQP/SUPPL	619902	Furniture/Equipment Under $5k
72551	TELEPHONE CELLULAR/RADIO	616902	Communications Under $5k
73000	TELECOM/RADIO TEST EQUIP/SUPL	619902	Furniture/Equipment Under $5k
74000	REFRIGATION EQUIP ACCESS	619902	Furniture/Equipment Under $5k
74500	ROAD/HWY BLDG MATL (ASPHALT)	607805	Campus Infrastr Over $5k
76000	ROAD/HWY EQUIP/EARTH	607805	Campus Infrastr Over $5k
77000	ROOFING	660827	Repairs
78000	SCALES WEIGHING APPARATUS	619902	Furniture/Equipment Under $5k
79000	SEED/SOD/SOIL/INOCULANTS	660003	Supplies and Services - Other
80000	SHOES BOOTS	660815	Clothing and Safety Equipment
80100	SIGNS/MATL/EQUIP SUPL	619902	Furniture/Equipment Under $5k
80300	SOUND SYSTEMS MISC	619902	Furniture/Equipment Under $5k
80500	SPORTING GOODS/ATHLETIC EQUIP	619902	Furniture/Equipment Under $5k
81000	SPRAYING EQUIP	619902	Furniture/Equipment Under $5k
81500	STEAM/HOT WTR FTNGS/ACC/SUPL	660827	Repairs

82000	STEAM/HOT WTR BOILERS/EQUIP	660827	Repairs
83000	TANKS: ALL TYPES	607805	Campus Infrastr Over $5k
84000	TELEVISION EQUIP ACC	619902	Furniture/Equipment Under $5k
84500	TEST EQUIP (NOT FOR ELEC MEAS)	619902	Furniture/Equipment Under $5k
85500	THEATRICAL EQUIP SUPL	619902	Furniture/Equipment Under $5k
86300	TIRES, LARGER THAN 15 TUBES	660827	Repairs
86365	RECAPPED/RETREADED TIRES	660827	Repairs
86398	TIRES, 15 & SMALLER	660827	Repairs
87000	VENETIAN BLINDS/AWNINGS/SHADES	619902	Furniture/Equipment Under $5k
88000	VISUAL ED EQUIP SUPL	619902	Furniture/Equipment Under $5k
88300	VOICE RESPONSE SYSTEMS	619902	Furniture/Equipment Under $5k
88500	WATER/WASTEWATER CHEMICALS	605006	Hazardous Waste
89000	WATER SUPPLY/SEWAGE EQUIP	660827	Repairs
89500	WELDING EQUIP SUPL	619902	Furniture/Equipment Under $5k
89800	X-RAY/RADIOLOGICAL EQUIP SUP	619801	Furniture/Equipment over $5K
90500	AIRCRAFT OPERATIONS SERVICE	613801	Professional Services
90600	ARCHITECTURAL SVS/PROF	607021	Design Other
90800	BOOKBINDING/REBINDING/REPAIR	608001	Library Books
90900	BUILDING CONSTRUCTION SVS/NEW	607031	Construction Contract
91000	BUILDING MAINT REPAIR SERV	660827	Repairs
91200	CONSTRUCTION SVS/GENERAL	607031	Construction Contract
91300	CONSTRUCTION SVS/HEAVY	607031	Construction Contract
91500	COMMUNICATIONS MEDIA SVS	613801	Professional Services
91800	CONSULTING SVS	613801	Professional Services
92045	SOFTWARE MAINTENANCE	616905	Software Under $5k

92500	ENGINEERING SVS, PROF	613801	Professional Services
92600	ENVIRONMENTAL/ECOLOGICAL SVS	613801	Professional Services
92645	HAZARDOUS MATERIAL SERVICES	605006	Hazardous Waste
92800	EQUIP MAINT/REPAIR: AUTO, ETC.	660827	Repairs
92900	EQUIP MAINT/REPAIR: AG/MARINE	660827	Repairs
93100	EQUIP MNT/RPR APPLIANCE/ATHLTC	660827	Repairs
93400	EQUIP MNT/RPR: LAWN/PAINTING	660827	Repairs
93600	EQUIP MAINT/REPAIR: GEN EQUIP	660827	Repairs
93800	EQUIP MNT/RPR: HOSP/LAB/TEST	660827	Repairs
94100	EQUIP MAINT/REPAIR: POWER	660827	Repairs
94500	FISHING/HUNTING/RELATED SVS	660003	Supplies and Services - Other
94600	FINANCIAL SERVICES	613801	Professional Services
94800	HEALTH RELATED SERVICES	613801	Professional Services
95200	HUMAN SERVICES	613801	Professional Services
95300	INSURANCE	660010	Insurance Premium
95800	MANAGEMENT SERVICES	613801	Professional Services
96100	MISC PROF SERVICES	613801	Professional Services
96115	CONCESS, CATERING SERVICES	613001	Contractual Services
96200	MISCELLANEOUS SERVICES	613001	Contractual Services
96500	PRINTING PREPARATION	660002	Printing
96600	Printing & Related Svs	660002	Printing
96800	PUBLIC WORKS RELATED SERVICE	607031	Construction Contract
97100	REAL PROPERTY RENTAL/LEASE	660825	Rentals / Leases
97500	RENT/LEASE EQUIP SVS: VEHICLE	660825	Rentals / Leases
97700	RENT/LEASE EQUIP SVS: HARDWARE	660825	Rentals / Leases

97900	RENT/LEASE EQUIP SVS: ENG/LAB	660825	Rentals / Leases
98100	RENT/LEASE EQUIP SVS: GENERAL	660825	Rentals / Leases
98400	RENT/LEASE EQUIP SVS: COMPUTER	660825	Rentals / Leases
98500	RENT/LEASE EQUIP SVS: OFFICE	660825	Rentals / Leases
98800	GROUND/RECREATIONAL SERVICES	660003	Supplies and Services - Other
98888	TREE PRUNING SERVICES	613001	Contractual Services
98900	SAMPLING SERVICES	613801	Professional Services
99000	SAFETY SERVICES/FIRE/SECURITY	613801	Professional Services
99200	TESTING CALIBRATION SVS	613801	Professional Services
99800	SURPLUS PROPERTY SALE/SERVICE	660003	Supplies and Services - Other

8.0 Appendix B: Units of Measure

Code	Description	Uses
BAG	Bag	Items sold by bag. ex: Bag of Mulch
BOX	Box	Business Cards, Envelopes from Clarks
CS	Case	Cases of printer paper
DAY	Days	Research contract, when pay is by day (ex: research grant with teacher for a day)
DLR	Dollar	Items with multiple components (computer work stations)
EA	Each	Items purchased as a whole. Ex: Toner Cartridge, shirt, promotional item, table, microscope, software license, event tickets
HRS	Hours	Service charged on an hourly basis; Ex: Reverberation work, Event Facilitator
LOT	Lot	Items sold as a group, may be many items but all arrive on campus at the same time. Ex: Computers sold with peripherals (cables, monitors)
MO	Month	Services billed on a monthly schedule. Ex: elevator, copier leases, pest control, fountain service, soft water service
PC	Piece	Items sold by the piece. Ex: Furniture
PR	Pair	Items sold in pairs, ex: drawer guides
RM	Ream	Clark's Letterhead Imprints

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9.0 Appendix C: Customizing Details Page

Processing Steps	Screenshot
Maintain Requisition Details page: **To remove the Item:** • Click Personalize • Select Item • Click on the Hidden box • Scroll to the bottom of the page and click OK	