

Online Requisitioning

Created 10/24/12 by M. Wancewicz

Revision Control

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Date	By	Action	Pages
02/12/2014	M Wancewicz	Release of New Document	All
07/10/2013	M Wancewicz	Updates based on user feedback including directions on logging into CI Financials	

Review/Approval History

Date	By	Action	Pages
	V Patscheck		

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Logging Into CI Financials

From the CSU Channel Islands webpage (www.csuci.edu) click on the link to “myCI”



The screenshot shows the Channel Islands California State University website. At the top left is the CSU Channel Islands logo, featuring a red circle with a white 'CSU' monogram. To its right, the text 'Channel Islands' is displayed in a large, dark font, with 'CALIFORNIA STATE UNIVERSITY' in a smaller font below it. A dark navigation bar contains the following links: 'CI Home', 'Future Students', 'Current Students', 'Parents', and 'Vis'. Below the navigation bar is a large banner image showing a group of people outdoors, with a man standing and a woman sitting at a table. A white progress indicator is visible at the bottom of the banner. On the left side of the page is a vertical red menu with white text links: 'President's Message', 'About CI', 'Academic Programs', 'Admissions', 'Employment', 'Extended University', 'Giving to CI', and 'Library'. At the bottom of this menu are two white buttons with red borders: one with the 'myCI' logo and another with a calendar icon and the word 'Calendar'. On the right side of the page, under the banner, is a 'News' section with the following headlines: 'CI to Host Spaghetti Bridge Testing and Celebration for Aspiring Engineers', 'CI students honored for role in landmark Ventura County study of women and girls', 'CI Announces Project ACCESO 2013 Summer Research Institute Presentations and Awards', and 'CI Climate Science Institute and Camp to Unite Students, Teachers and Climate Experts'.

Sign in with your Dolphin Username and password.

myCI Sign In

Dolphin Name

firstname.lastname

Dolphin Password

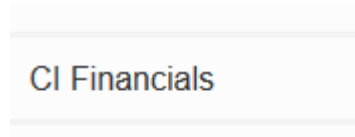
●●●●●●●●

This is my home or office computer ([Learn more](#)).

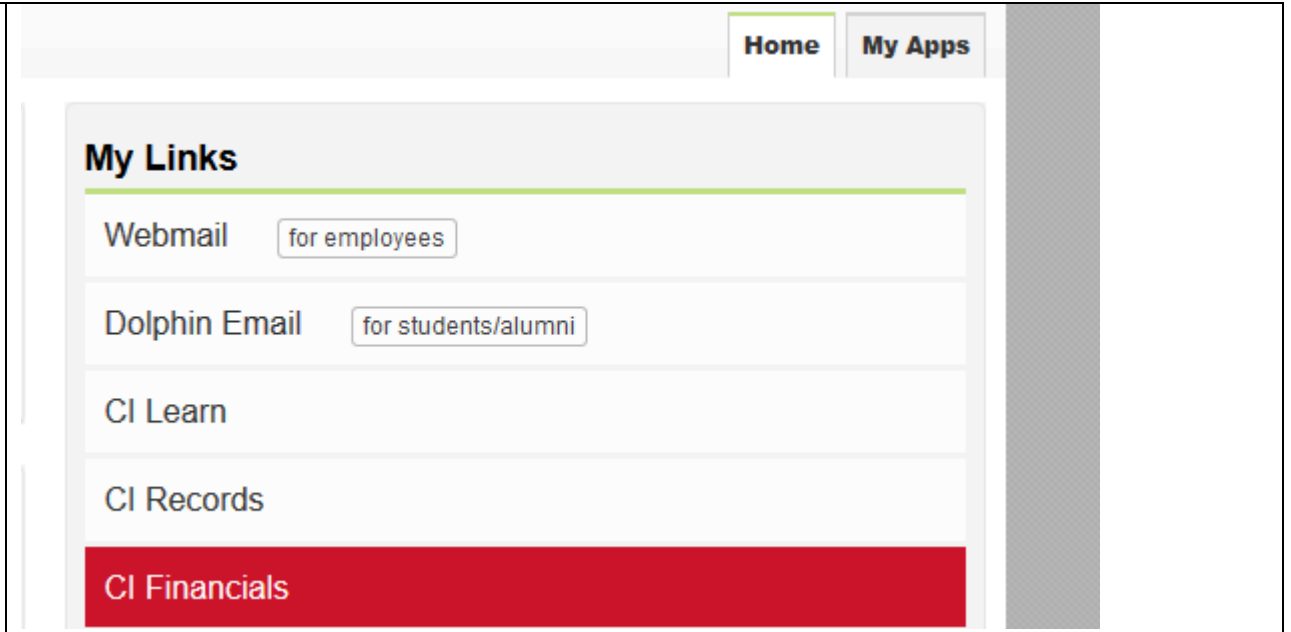
Sign In

[Reset Password](#) | [Help](#)

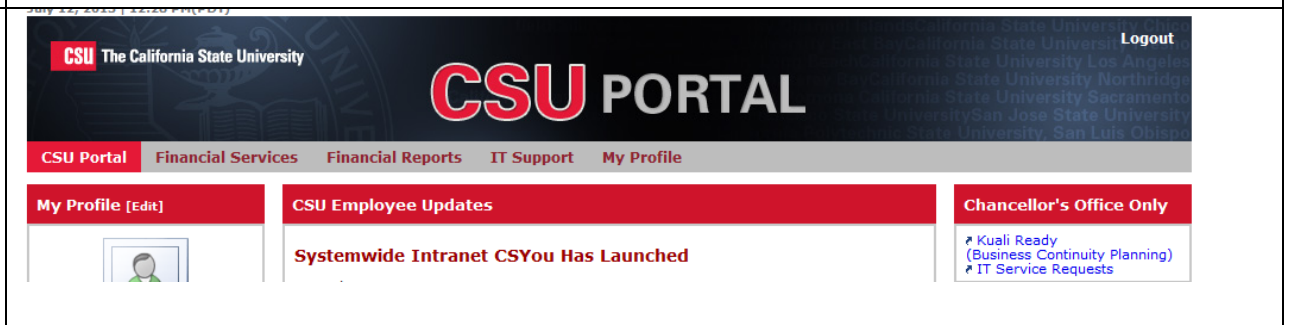
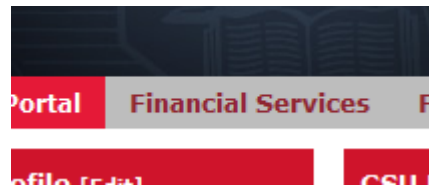
Under My Links on the righthand side of the screen, click on the link to CI Financials.



*If you do not have this link, please confirm you have submitted a Peoplesoft Access Request.



On the CSU Portal page, click on the link to Financial Services on the top menu.



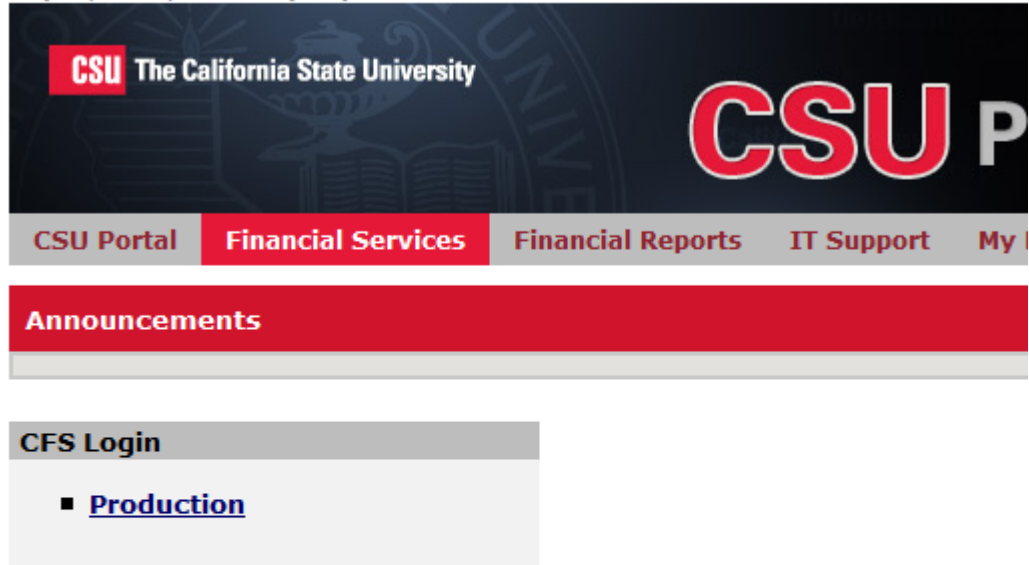
Under CFS Login, click on the link to production.

Announcements

CFS Login

- [Production](#)

July 12, 2013 | 12:28 PM(PDT)



The screenshot shows the CSU Portal homepage. At the top, there is a dark banner with the CSU logo and the text 'The California State University' and 'CSU P'. Below the banner is a navigation menu with links for 'CSU Portal', 'Financial Services', 'Financial Reports', 'IT Support', and 'My'. Underneath the navigation menu is a red 'Announcements' section. Below that is a 'CFS Login' section with a link to 'Production'.

You are now logged into CI Financials.



The screenshot shows the Oracle CI Financials interface. At the top, there is the Oracle logo and a blue header bar. Below the header bar, there is a 'Personalize' link followed by 'Content' and 'Layout' links. A 'Menu' window is open, showing a search bar and a list of items, including 'My Favorites'.

First Time Setup

When you first enter the requisition, there are many fields that are not used by any business unit at CSUCI. To “clean up” the look of the page, we will hide these fields. Once they are hidden, they will remain hidden each time the page is accessed.

Customizing the Main Requisition Page

1. On the main requisition page, click the “Customize” link.

2. Click on the Copy Setting Link at the bottom of the page:

[Copy Settings](#)

3. In Settings to Copy, type or lookup “CI Req” and click the “OK” button at the bottom of the page.

Copy Your Customization Settings

Settings to Copy:

4. Click “OK” at the bottom of the page.

OK

Column Order

- Tab Details (frozen)
- Line (frozen)
- (column 3) (frozen)
- Item (hidden)
- Description (frozen)
- (column 6)
- Quantity
- *UOM
- Category
- Price
- Amount
- Status
- (column 22)
- (column 25)
- (column 28)
- Tab Ship To/Due Date
- Due Date
- Ship To
- Price
- (column 31)
- Tab Status
- Status
- Tab Vendor Information
- Vendor
- Vendor Name
- Location
- Tab Item Information (hidden)
- UPN ID (hidden)
- RFQ Required (hidden)
- Device Tracking (hidden)
- Vendor Item ID (hidden)
- Vendor's Catalog (hidden)
- Manufacturer ID (hidden)
- Manufacturer's Item ID (hidden)
- Tab Attributes
- (column 52)
- Buyer
- Name
- Physical Nature (hidden)
- Zero Price Indicator (hidden)
- Amount Only (hidden)
- Inspection Required
- Inspect ID (hidden)
- Tab Contract (hidden)
- Contract ID (hidden)
- Contract Line (hidden)
- GPO ID (hidden)
- GPO Contract Number (hidden)
- Tab Sourcing Controls (hidden)
- Source Status (hidden)
- *Source Date (hidden)
- Calculate Price (hidden)
- Override Suggested Vendor (hidden)
- Consolidate with other Reqs (hidden)
- Sourcing Controls (hidden)
- X Unit Price Tolerance (hidden)
- X Unit Price Tolerance - Under (hidden)
- Unit Price Tolerance (hidden)
- Unit Price Tolerance - Under (hidden)

Sort Order

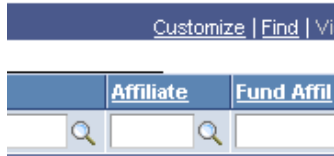
Description

Hidden
 Frozen

OK Cancel Preserve [Copy Settings](#) [Save Settings](#) [Delete Settings](#)

Customizing the Distribution Page

1. On the Distribution page, click the “Customize” link located on the far right of the page.



2. Click on the Copy Setting Link at the bottom of the page:

[Copy Settings](#)

3. In Settings to Copy, type or lookup “CI Req” and click the “OK” button at the bottom of the page.

Copy Your Customization Settings

Settings to Copy:

4. Click “OK” at the bottom of the page.

Column Order

Tab Chartfields (frozen)	↑
Distrib (frozen)	↓
Status (frozen)	[
Percent (frozen)]
Quantity	<input checked="" type="checkbox"/> Hi
Amount	<input type="checkbox"/> Fr
GL Unit	
Account	
Oper Unit (hidden)	
Fund	
Dept	
Program	
Class	
Bud Ref (hidden)	
Product (hidden)	
Project	
Affiliate (hidden)	
Fund Affil (hidden)	
Oper Unit Affil (hidden)	
Tab Details	
*Location	
IN Unit	
Budget Date	
Commitment Control Close Flag	
Statistics Code	
Open Qty	
GL Base Amount	
Base Currency (column 54)	
Status	
Budget Status	
Tab Asset Information	
AM Unit	
Profile ID	
CAP #	
Sequence	
Tag Number	
EmpID	
Capitalize	
Cost Type	
Description	

[Copy Settings](#)

Entering a requisition

1. Go to Purchasing > Requisitions > Add/Update Requisitions
2. On the Requisitions page, go to the “Add a New Value” tab.
3. Make sure the correct business unit is entered and the Requisition ID says ‘NEXT’ before clicking the “ADD” button.
4. Business Units for CSU Channel Islands are:

CICMP
CIASI
CICSA
CIFDN
CIUGC

*Your security may limit the business units you have the ability to work in.

Menu

- ▼ Purchasing
 - ▼ Requisitions
 - ▷ Reconcile Requisitions
 - ▷ Review Requisition Information
 - ▷ Reports
 - Add/Update Requisitions
 - Approve Amounts
 - Approve ChartFields
 - Stage For Loading
 - Load Requisitions
 - Update Direct Shipments
 - Budget Check
 - Entry Event Request
 - Purge Load Requests
 - Approval Workflow
 - ▷ Request for Quotes
 - ▷ Procurement Contracts
 - ▷ Purchase Orders

Requisitions

[Find an Existing Value](#) **Add a New Value**

Business Unit:

Requisition ID:

[Find an Existing Value](#) | [Add a New Value](#)

5. Enter 73 + your 9 digit employee ID (or campus POI ID for auxiliary employees)

6. Enter 'ONL' in the Origin field.

Maintain Requisitions

Requisition

Business Unit: CICMP

Status: Open

Requisition ID: NEXT

[Copy From](#)

Budget Status: Not Chk'd

Hold From Further Processing

▼ Header

***Requester:** 73000098203

[Requisition Defaults](#)

***Requisition Date:** 10/24/2012 [Requester Info](#)

[Add Comments](#)

Origin: ONL

[Requisition Activities](#)

***Currency Code:** USD Dollar

Accounting Date: 10/24/2012

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#)

[Catalog](#)

[Item Search](#)

[Requester Items](#)

7. Under 'Line' on the "Details" tab, enter a description of each line item being purchased, the quantity, the UOM (unit of measure- DLR, EA, BOX, RMS) and the unit price.

For a detailed description on how to use units of measure, please go to Appendix E.

Line									
Details		Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls	
Line	Item	Description	Quantity	UOM	Category	Price	Amount	Sta	
1	<input type="text"/>	Printer repair	1.0000	EA	96200	250.00000	250.00	Op	

8. Enter the category code by looking up the code that best matches the purchase being made.

For a list of category codes, please see Appendix A.

[Requester Items](#)

Requester Items						
Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Cont	Customize Find
Description	Quantity	*UOM	Category	Price	Amou	
Printer repair	1.0000		96200	250.00000	250.0	

Look Up Category

SetID: CICMP
 Category: begins with 96200
 Description: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Category	Description
96200	MISCELLANEOUS SERVICES

9. Optional: If you have a vendor selected/quote for this requisition, enter the vendor number. A list of vendors can be found by running the CI_PO_ACTIVE_VENDORS query.

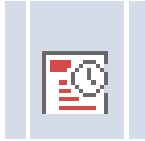
Note: Vendor can be changed by procurement to meet organizational requirements including already existing contracts, small business, DVBE and bid winner for any contract

Line						
Details	Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract
Line	Item	Description	Vendor	Vendor Name	Location	
1		Printer repair				

Line						
Details	Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract
Line	Item	Description	Vendor	Vendor Name	Location	
1		Printer repair	0000002382	Norcom		

that is required to go out to bid.

10. Enter the chartfield string by clicking on the "Schedule" icon.



Qty	Price	Amount	Status			
	250.00000	250.00	Open			

11. Next click on the white icon with 3 arrows.



Maintain Requisitions

Schedule

Business Unit: CICMP **Requisition Date:** 12/05/2012
Requisition ID: NEXT **Status:** Open
[Return to Main Page](#)

Line	Item	Quantity	Each	Amount	Due Date	Status
1	Printer repair	1.0000	Each	250.00 USD		

Sched	*Ship To	Quantity	Price	Amount	Due Date	Status
1	RECEIV	1.0000	250.00000	250.00		Active

12. For one chartfield, enter the accounting string, including your account, fund and your department code as well as program, project and class if needed. To lookup any chartfield while processing, click on the magnifying glass next to the chartfield.

a. To add additional funding sources for each line item, click on the "+" button located on the right hand side of the

Maintain Requisitions

Distribution

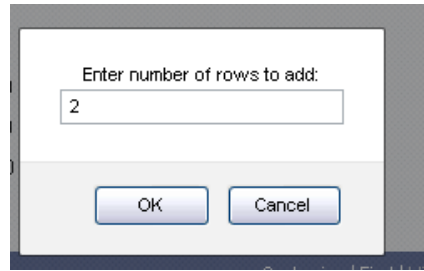
Requisition ID: NEXT **Item:** [Printer repair](#)
Line: 1 **Status:** Active
Schedule: 1
Ship To: RECEIVING Receiving **Quantity:** 1.0000 EA
***Distribute by:** Quantity **Open Quantity:** 1.0000
***Liquidate by:** Quantity **Amount:** 250.00 USD
SpeedChart: [Multi-SpeedCharts](#)

Distrib	Status	Percent	Quantity	Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	
1	Open	100.0000	1.0000	250.00	CICMP	660828	GD901	230				

distributions line.



b. Enter the number of lines to add and click "OK".



c. Enter the funding sources and update the percentage or quantity to the appropriate funding split.

Distributions

Distrib	Status	Percent	Quantity	Amount	GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	50.0000	0.5000	125.00	CICMP	660828	GD901	230			
2	Open	25.0000	0.2500	62.50	CICMP	660828	GD901	820			
3	Open	25.0000	0.2500	62.50	CICMP	660828	TH901	860			

OK Cancel Refresh

13. When finished entering the chartfield string(s), click on the "OK" button.



14. Click on "Return to Main Page"

[Return to Main Page](#)

Line

1	Item:	Printer repair	Quantity:	1.0000 Each	Amount:	250.00 USD
---	-------	----------------	-----------	-------------	---------	------------

Schedule

Sched	*Ship To	Quantity	Price	Amount	Due Date	Status
1	RECEIV	1.0000	250.00000	250.00		Active

15. To define the matching (Physical goods or services), click on the attributes tab.

Line

Attributes

Line	Description	Buyer	Name	Physical Nature	Inspection Required
1				Goods	<input type="checkbox"/>

16. For each line of the requisition, select Goods or Services depending on what

is being procured.

17. To attach the quote and other supporting documentation for the price and division/funding source approval, click on the "Comment" icon (looks like a cartoon text box)

Requisition

Business Unit: CICMP
Requisition ID: NEXT [Copy From](#) **Status:** Open
Budget Status: Not Chk'd

Hold From Further Processing

Header

***Requester:** 73000098203 Wancewicz, Marysia [Requisition Defaults](#)
***Requisition Date:** 02/08/2013 [Requester Info](#) **Add Comments** [Requisition Activities](#)
Origin:
***Currency Code:** USD Dollar
Accounting Date: 02/08/2013

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line

Customize | Find | View All | First 1 of 1 Last

Line	Description	Buyer	Name	Physical Nature	Inspection Required
------	-------------	-------	------	-----------------	---------------------

18. To add an attachment, click Attach.



*Please limit attachments to one attachment per requisition. To include multiple items, please scan them to one PDF document and attach the one document to the Requisition.

Line Comments

Business Unit: CICMP **Requisition Date:** 10/24/2012
Requisition ID: 0000000001 **Status:** Open **Line:** 1

***Sort Method:** Comment Time Stamp ***Sort Sequence:** Ascending [Sort](#)

Comments


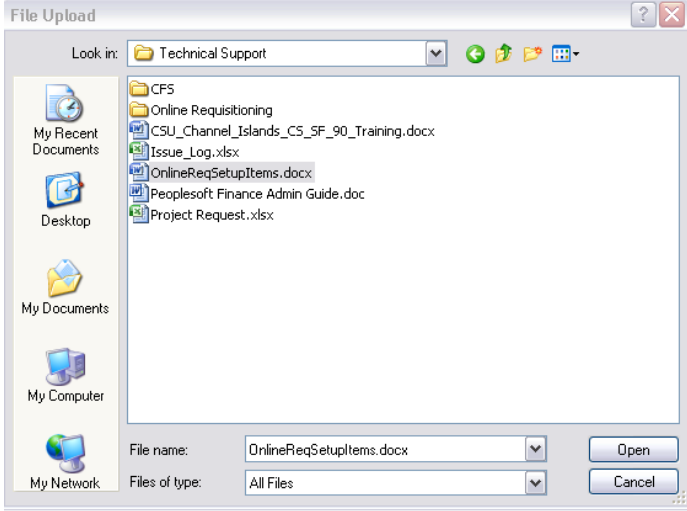
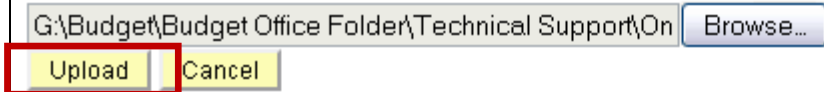
[Copy Standard Comments](#) [Copy Item Specs](#) **Comment Status:** Active [Inactivate](#) [+](#)

Send to Vendor **Shown at Receipt** **Shown at Voucher**

Associated Document

Attachment [Attach](#) [View](#) [Delete](#) **Email**

From -> REQ CICMP-0000000001-1

<p>19. Click browse to bring up a File Upload screen.</p>	
<p>20. Navigate to the file location, select the file and click "Open".</p>	
<p>21. Once the file is selected, click upload.</p>	

22. Once the file is uploaded, click "OK" to return to the main page.

Sort Method: Comment Time Stamp
***Sort Sequence:** Ascending

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#) [Copy Item Specs](#) **Comment Status:** Active

Send to Vendor **Shown at Receipt** **Shown at Voucher**

Associated Document

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

From -> REQ CICMP-0000000001-1



23. Once the attachment is added, "Add Comments" will change to "Edit Comments"

24. Click "Save" to save the requisition.
25. Record your requisition number for your records and send an e-mail with the requisition number to the appropriate person for approval.

Maintain Requisitions

Requisition

Business Unit: CICMP


Status: Open  

Requisition ID: 0000000001 [Copy From](#)


Budget Status: Not Chk'd 

Hold From Further Processing

▼ Header

***Requester:** 73000098203  Wancewicz, Marysia

[Requisition Defaults](#)

***Requisition Date:** 10/24/2012  [Requester Info](#)

[Add Comments](#)

Origin: ONL  Online Entry

[Requisition Activities](#)

***Currency Code:** USD Dollar

Accounting Date: 10/24/2012 

Amount Summary



Total Amount: 250.00 USD

Add Items From





[Purchasing Kit](#)
[Item Search](#)

[Catalog](#)
[Requester Items](#)

Select Lines To Display

Line:  To:  [Retrieve](#)

Line

Details		Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls	Customize Find View All	
Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status		
1		 Printer repair	1.0000	EA 	96200 	250.00000	250.00	Open		


[View Printable Version](#)

*Go to: [...More...](#)



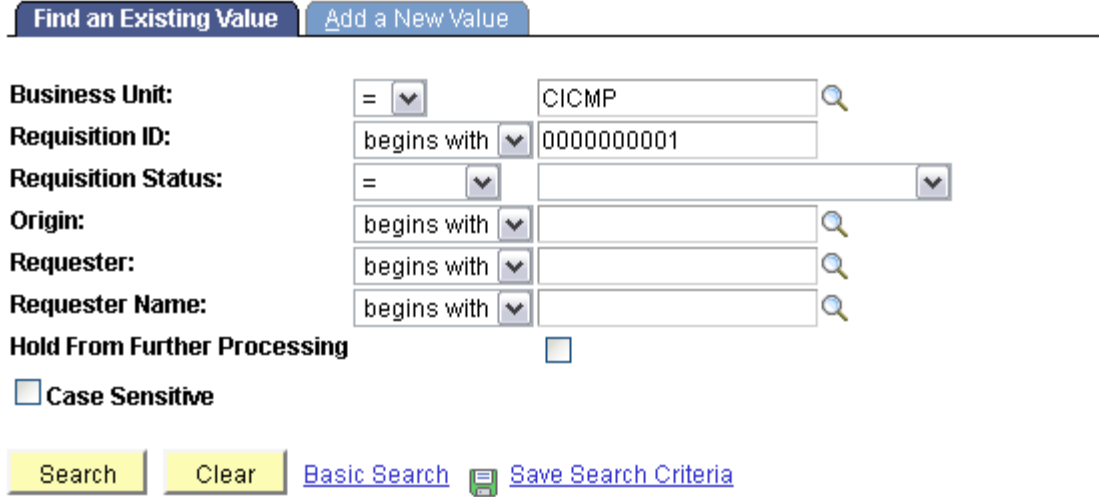
 Save

 Notify

 Refresh

Approving A Requisition

To get into PeopleSoft please follow the directions under Logging into CI Financials.

<p>1. Once a requisition is saved, the approver should receive notification from the user who entered the requisition with a request to approve the requisition.</p>	
<p>2. Navigate to the requisition (Purchasing > Requisitions > Add/Update Requisition.</p>	
<p>3. Lookup the requisition by entering the business unit and requisition number or other information. (Ex: requestor name & status)</p> <p>4. Click "Search"</p>	

	<div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black;"> Find an Existing Value Add a New Value </div> <div style="margin-top: 10px;"> <p>Business Unit: = CICMP </p> <p>Requisition ID: begins with </p> <p>Requisition Status: = Open ▼</p> <p>Origin: begins with </p> <p>Requester: begins with </p> <p>Requester Name: begins with Wancewicz, Marysia </p> <p>Hold From Further Processing <input type="checkbox"/></p> <p><input type="checkbox"/> Case Sensitive</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Search Clear Basic Search Save Search Criteria </div> </div> </div>														
<p>5. All requisitions meeting the criteria specified will appear. Click on any of the blue hyperlinks to select the requisition.</p>	<div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black;"> Search Clear Basic Search Save Search Criteria </div> <div style="margin-top: 10px;"> <h3 style="color: #4a7ebb;">Search Results</h3> <div style="background-color: #4a7ebb; color: white; padding: 2px; display: flex; justify-content: space-between; font-size: 0.8em;"> View All First ◀ 1 of 1 ▶ </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: left; font-size: 0.8em;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th>Business Unit</th> <th>Requisition ID</th> <th>Requisition Status</th> <th>Origin</th> <th>Requester</th> <th>Requester Name</th> <th>Hold From Further Proce</th> </tr> </thead> <tbody> <tr style="background-color: #d9e1f2;"> <td>CICMP</td> <td>0000000001</td> <td>Open</td> <td>ONL</td> <td>73000098203</td> <td>Wancewicz, Marysia N</td> <td></td> </tr> </tbody> </table> </div> </div>	Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From Further Proce	CICMP	0000000001	Open	ONL	73000098203	Wancewicz, Marysia N	
Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From Further Proce									
CICMP	0000000001	Open	ONL	73000098203	Wancewicz, Marysia N										
<p>6. Review requisition items and chartfield strings.</p>															
<p>7. Once all information appears to be correct, click on the green checkbox next to status to approve the requisition. Checking the hold from further processing box will prevent requisitions from being turned into POs.</p>	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> <h3 style="color: #4a7ebb; margin: 0;">Maintain Requisitions</h3> <h2 style="color: #4a7ebb; margin: 0;">Requisition</h2> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>Business Unit: CICMP</p> <p>Requisition ID: 0000000001</p> </div> <div style="width: 45%;"> <p>Status: Open <input checked="" type="checkbox"/> ✘</p> <p>Budget Status: Not Chk'd </p> <p><input type="checkbox"/> Hold From Further Processing</p> </div> </div> <hr style="border: 1px solid #4a7ebb; margin-top: 10px;"/> </div>														

8. Save the requisition by pressing the "Save" button at the bottom of the screen.



9. After the requisition is approved, the requisition is budget checked overnight and will be ready for processing by procurement the following business day.

Maintain Requisitions

Requisition

Business Unit: CICMP

Requisition ID: 0000000001

Status: Approved

Budget Status: Not Chk'd



Hold From Further Processing

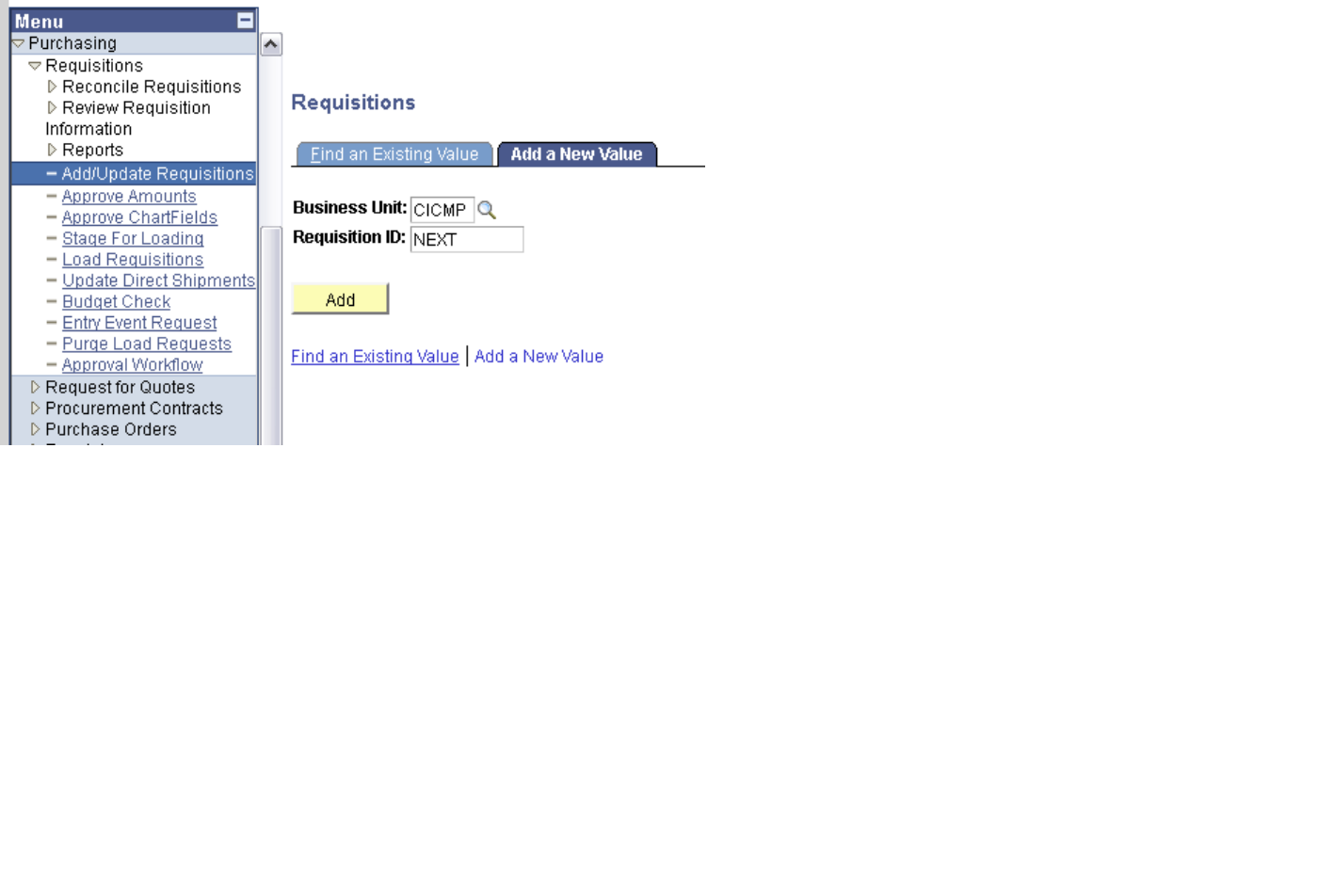
▼ Header

Business Unit

sto **Processing**

Copy a prior requisition.

If a similar requisition has been created in the past, the requisition can be copied and updated appropriately.

<ol style="list-style-type: none">1. Go to Purchasing > Requisitions > Add/Update Requisitions2. On the Requisitions page, go to the “Add a New Value” tab.3. Make sure the correct business unit is entered and the Requisition ID says ‘NEXT’ before clicking the “ADD” button.4. Business Units for CSU Channel Islands are:<ul style="list-style-type: none">• CICMP• CIASI• CICSA• CIFDN• CIUGC <p>*Your security may limit the business units you have the ability to work in.</p>	
---	---

5. Enter the requestor ID (typically 73 + your employee ID)
6. Click on the "Copy From" link

Maintain Requisitions

Requisition

Business Unit: CICMP **Status:** Open
Requisition ID: NEXT [Copy From](#) **Budget Status:** Not Chk'd

Hold From Further Processing

Header

*Requester:

*Requisition Date: 10/25/2012 [Requester Info](#)

Origin:

*Currency Code: USD Dollar

Accounting Date: 10/25/2012

[Requisition Defaults](#)

[Add Comments](#)

[Requisition Activities](#)

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#)

[Catalog](#)

[Item Search](#)

[Requester Items](#)

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open

[View Printable Version](#)

*Go to: [...More...](#)

7. Enter in the prior requisition or other identifying information to find a requisition to copy.

8. Click "Search"

Maintain Requisitions
Copy Requisition

Header

Business Unit:

Requisition ID:

Req Status: Origin:

Requester:

Requester Name:

Requisition Date: To:

Vendor SetID: [Vendor Lookup](#)

Vendor ID: [Vendor Details](#)

Item SetID: Vendor Name:

Item Description: Item ID:

Department: Direct Ship

Requisition	Req ID	Status	Origin	Requester
<input type="checkbox"/>				

9. A list of requisitions that meet the criteria specified will appear. Check the box next to the requisition you would like to Copy, and click the "OK" button.

Requisition	Req ID	Status	Origin	Requester
<input checked="" type="checkbox"/>	0000000001	Approved	ONL	73000098203

10. If no requestor or a different requestor than the original requisition has been specified, the following message will appear, click "Yes" to continue.

The source requestor (73000098203) is different from the target requestor (), copy? (10150,186) All copied defaults will remain unchanged. Do you want to copy?

11. Validate funding source, description, category code, and amount and update the document attachments as appropriate before clicking "Save".

12. Submit for approval as appropriate.

Maintain Requisitions

Requisition

Business Unit: CICMP **Status:** Open
Requisition ID: 0000000002 [Copy From](#) **Budget Status:** Not Chk'd
 Hold From Further Processing

Header

***Requester:** 73000098203 Wanciewicz, Marysia [Requisition Defaults](#)
***Requisition Date:** 10/25/2012 [Requester Info](#) [Add Comments](#)
Origin: ONL Online Entry [Requisition Activities](#)
***Currency Code:** USD Dollar
Accounting Date: 10/25/2012

Amount Summary

Total Amount: 250.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Select Lines To Display

Line: **To:**

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1		Printer repair	1.0000	EA	96200	250.00000	250.00	Open

[View Printable Version](#)


*Go to: [...More...](#)

Cancel a requisition

1. On the requisition, click on the “X” icon next to Requisition Status.

Maintain Requisitions


Requisition


Business Unit: CICMP **Status:** Approved 


Requisition ID: 0000000003 **Budget Status:** Valid

Hold From Further Processing


Header

***Requester:** 73000098203  Wancewicz, Marysia [Requisition Defaults](#)

***Requisition Date:** 10/25/2012  [Requester Info](#) [Add Comments](#)

Origin: ONL  Online Entry [Requisition Activities](#)



***Currency Code:** USD Dollar [Document Status](#)

Accounting Date: 10/25/2012 

Amount Summary





Total Amount: 250.00 USD

Add Items From **Select Lines To Display**

[Purchasing Kit](#) [Catalog](#) **Line:**  **To:**  [Retrieve](#)

[Item Search](#) [Requester Items](#)

Line [Customize](#)

Line	Item	Description	Quantity	UOM	Category	Price
1		 Printer repair 	1.0000	EA	96200 	250.00000

[View Printable Version](#) ***Go to:** [...More...](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#)

2. The following error message will appear:

“Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7) When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7) When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

<p>changes, then return to change its status.”.</p> <p>3. Click the “Yes” button to continue.</p>	
<p>4. Press the “Budget Check” button to continue.</p> <p>5. Once the budget check process is complete, the screen returns to the Add/Update Requisitions page.</p>	<p>Successful Cancellation</p> <p>The requisition has been canceled, but requires a budget check. Press the budget check button below to run the budget checking process. Otherwise click OK to continue without budget checking the Requisition.</p> <p><input type="button" value="Budget Check"/> <input type="button" value="Ok"/></p> <p>Budget Status</p> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/></p>

Generate a PDF of (Print) a requisition

<p>To generate a copy of a requisition for your records, go to Purchasing > Requisitions > Reports > Print Requisition</p>	
---	--

First Time only:

Go to the “Add a New Value Tab” and add a new run control. Run controls are user defined, can be any combination of letters but can not contain spaces.

Otherwise, search for your existing Run Control.

Requisition Print

[Find an Existing Value](#)

[Add a New Value](#)

Run Control ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

Enter the business unit, requisition ID (search for requisition ID by clicking on the magnifying glass next to the and click on the “Select all” button next to statuses to approve.

Click Run.

Requisition Print

Run Control ID: PrintReq [Report Manager](#) [Process Monitor](#) **Run**

Language: English Specified Recipient's

Report Request Parameters

Business Unit: CICMP

Requisition ID: 0000000001

From Date:

Through Date:

Requester:

Statuses to Include

Approved

Canceled

Completed

Open

Pending

NOT On Hold

Make sure 'Select' is checked next to PORQ010 and press the 'OK' button.

Process Scheduler Request

User ID: 73000098203 Run Control ID: PrintReq

Server Name: Run Date: 10/29/2012

Recurrence: Run Time: 9:13:12AM

Time Zone:

Process List

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

Note the process instance number and then go to process monitor.

Requisition Print

Run Control ID: PrintReq [Report Manager](#) [Process Monitor](#) **Run**

Language: English Specified Recipient's Process Instance: 2879229

Report Request Parameters

Business Unit: CICMP

Requisition ID: 0000000001

From Date: 31

Through Date: 31

Requester:

Statuses to Include

Approved Canceled Completed Open Pending

Select All

NOT On Hold

Click the refresh button until the run status is success and the distribution status is posted.

Process List [Server List](#)

View Process Request For

User ID: 73000098203 Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List [Customize](#) [Find](#) [View All](#) First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2879229		SQR Report	PORQ010	73000098203	10/29/2012 9:13:12AM PDT	Success	Posted	Details

Click on the "Details" link next to the process.

Click on the "View Log/Trace link.

Status: Success **Distribution Status:** Posted

Control ID: PrintReq	Update Process
ation: Server	<input type="radio"/> Hold Request
ver: PSUNX	<input type="radio"/> Queue Request
urrence:	<input type="radio"/> Cancel Request
	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Time	Actions
quest Created On: 10/29/2012 9:13:42AM PDT	Parameters Transfer
Anytime After: 10/29/2012 9:13:12AM PDT	Message Log
an Process At: 10/29/2012 9:14:07AM PDT	Batch Timings
ed Process At: 10/29/2012 9:14:15AM PDT	View Log/Trace

Click on the PDF file in the middle to view the printed requisition

Distribution Details

Distribution Node: FACFSPSB **Expiration Date:** 11/05/2012

File List		
Name	File Size (bytes)	Datetime Created
SQR_PORQ010_2879229.log	1,632	10/29/2012 9:14:15.000000AM PDT
porq010_2879229.PDF	2,639	10/29/2012 9:14:15.000000AM PDT
porq010_2879229.out	63	10/29/2012 9:14:15.000000AM PDT

Distribute To

Requisition

CSU Channel Islands



Ship To: Receiving Warehouse
 One University Drive
 Attn: Receiving Warehouse
 Camarillo CA 93012


Business Unit:		CICMP	APPROVED
Req ID	Date	Page	
0000000001	10/24/2012	1	
Requester		Entered By	
Wancewicz, Marysia		Wancewicz, Marysia	

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account				Prgm	Class	Project		Dist Amt
Buyer: Strauch, Cathy Vendor: 0000002382 Norcom									
1-1	Printer repair			96200	1.00	EA	250.00	250.00	
1-1-1	660828	GD901	230						125.00
1-1-2	660828	GD901	820						62.50
1-1-3	660828	TH901	860						62.50
<u>Line Total:</u>								250.00	
2-1	Fuser			96600	250.00	DLR	1.00	250.00	
2-1-1	660002	GD901	220						250.00
<u>Line Total:</u>								250.00	
<u>Total Requisition Amount:</u>								500.00	

Processing a Change Order

Change orders are used to make changes to purchase orders after the purchase order has been dispatched. Reasons for change orders include changes in price, additional services or good being procured.

Individual entering the change order must have the ability to change approved requisitions.

<p>1. Navigate to the requisition (Purchasing > Requisitions > Add/Update Requisition.)</p>	
<p>2. Lookup the requisition by entering the business unit and requisition number or other information. (Ex: requestor name & status)</p> <p>3. Click "Search"</p>	<div data-bbox="531 488 1619 987"><p>Find an Existing Value Add a New Value</p><hr/><p>Business Unit: [=] [v] CICMP [magnifying glass]</p><p>Requisition ID: [begins with] [v] 0000000001</p><p>Requisition Status: [=] [v] [dropdown]</p><p>Origin: [begins with] [v] [magnifying glass]</p><p>Requester: [begins with] [v] [magnifying glass]</p><p>Requester Name: [begins with] [v] [magnifying glass]</p><p>Hold From Further Processing <input type="checkbox"/></p><p><input type="checkbox"/> Case Sensitive</p><p>Search Clear Basic Search  Save Search Criteria</p></div>

Find an Existing Value **Add a New Value**

Business Unit: =

Requisition ID: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

4. All requisitions meeting the criteria specified will appear. Click on any of the blue hyperlinks to enter the requisition.

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1 of 1

Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From Further Proce
CICMP	0000000001	Open	ONL	73000098203	Wancewicz, Marysia N	

5. Add new requisition line.
Add funding source

6. To delete a line, click the “-“
button,



[New Window](#) | [Help](#) | [Cus](#)

Maintain Requisitions

Requisition

Business Unit: CICMP **Status:** Approved ✖
Requisition ID: 0000000001 **Budget Status:** Valid

Hold From Further Processing

Header

***Requester:** 73000098203 Wancewicz, Manysia [Requisition Defaults](#)
***Requisition Date:** 10/24/2012 [Requester Info](#) [Add Comments](#)
Origin: ONL Online Entry [Requisition Activities](#)
***Currency Code:** USD Dollar [Document Status](#)
Accounting Date: 10/24/2012

Amount Summary

Total Amount: 250.00 USD

Add Items From **Select Lines To Display**

[Purchasing Kit](#) [Catalog](#) **Line:** **To:** [Retrieve](#)
[Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status	
1		Printer repair	1.0000	EA	96200	250.00000	250.00	Approved	
2		Fuser	250.0000	DI	96600	1	0.00	Approved	

[View Printable Version](#) *Go to: [...More...](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

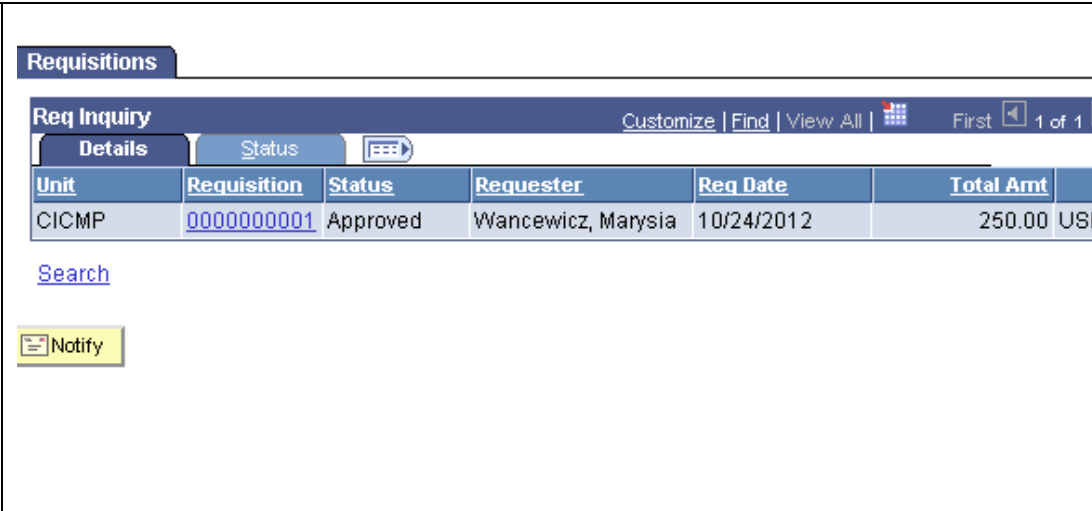
7. Save and Budget check the
Requisition & move through the
approval process as
appropriate.

Reviewing Requisition Information

After the requisition has been created, there are tools that will assist the department in determining where the requisition is in the purchasing process.

Checking requisition status

<p>1. After a requisition has been entered, it can be viewed by going to Review Requisition Information.</p>	
<p>2. Navigate to Requisition Inquiry (Purchasing > Requisitions Review Requisition Information).</p> <p>3. Enter Business Unit and requestor name or requisition ID to view requisitions</p>	<p>Requisition Inquiry</p> <p>Business Unit: <input type="text" value="CICMP"/> </p> <p>Requisition ID: <input type="text"/> </p> <p>Req Status: <input type="text"/> </p> <p>Requester: <input type="text" value="73000098203"/> </p> <p>Requester Name: <input type="text" value="Wancewicz, Marysia"/> </p> <p>Requisition Date: <input type="text"/> </p> <p>Vendor SetID: <input type="text" value="CICMP"/> Vendor Lookup</p> <p>Vendor ID: <input type="text"/> Vendor Details</p> <p>Item SetID: <input type="text" value="CICMP"/></p> <p>Item Description: <input type="text"/></p> <p>Department: <input type="text"/> </p> <p>To Req: <input type="text"/> </p> <p>Origin: <input type="text"/> </p> <p>To: <input type="text"/> </p> <p>Vendor Name: <input type="text"/> </p> <p>Item ID: <input type="text"/> </p> <p><input type="checkbox"/> Direct Ship</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>

<p>4. The requisition(s) that meet the criteria will appear. The details tab lists the dollar amount, status and requestor.</p>	
<p>5. The Status tab includes the flow of the requisition through the system, including PO number, Receipt & voucher.</p>	<p style="background-color: yellow; text-align: center;"><<ADD SCREENSHOT HERE>></p>

Approval Workflow by Budget Area

All workflow information is provided for guidance purposes only and is subject to change as delegation of authority documents are updated.

CSU Channel Islands

Office of the President

All requisitions may be approved within PeopleSoft by Therese Eyermann. In the event that Therese is out of the office, requisitions may be approved by Missy Jarnagin if they are under 25k and Ysabel Trinidad if they are over 5k.

Finance & Administration

Student Affairs

Requisitions for goods and services under 5k may be approved by the Dean, AVP of Enrollment Services or

Technology and Communications

All requisitions may be approved within PeopleSoft by Neal Fisch.

Academic Affairs

Requisitions should be approved by the AVP for each center or other designee.

Arts & Sciences: Chanda Cunningham-Spence or Karen Carey

School of Education: Cynthia Color or Gary Kinsey

Extended University: Nick Fuentes or Gary Berg

Academic Support: Dan Wakelee or Gayle Hutchinson

Provost: Gayle Hutchinson

CSU Channel Islands Foundation

All requisitions may be approved within PeopleSoft by Therese Eyermann. In the event that Therese is out of the office, requisitions may be approved by Missy Jarnagin if they are under 25k and Ysabel Trinidad if they are over 5k.

Associated Student Incorporated

All requisitions entered for Associated Students Incorporated should be approved by Christine Thompson. In the event Christine is out of the office, requisitions can be approved by Genevieve-Evans Taylor.

University Glen Corporation & Site Authority

All requisitions entered for University Glen Corporation or Site Authority should be approved by Erik Blaine. In the event that Erik Blaine is out of the office, Dave Nirenberg or Deanne Ellison may approve requisitions on his behalf.

E-mail approval template

For budget areas which require budget approval.

Appendixes

Appendix A: Category Codes, Descriptions & common uses

Category	Catg Descr	Account	Acct Descr	Uses
02500	AIR COMPRESSORS ACC	619902	Furniture/Equipment Under \$5k	Accessories for Air Compressors
03100	HVAC PARTS	660827	Repairs	Parts for HVAC system
03700	ENTERTAINMENT, MISC	660820	Business Meals/Hospitality	Bands, Music, Speakers
04000	ANIMALS/LIVE	660003	Supplies and Services - Other	Live animals (sciences)
04500	APPLIANCES, HOUSEHOLD	619902	Furniture/Equipment Under \$5k	Refrigerators, dishwashers, garbage disposals, microwaves, washers, dryers
05500	AUTO ACCESSORIES	660877	Parts	Vehicles accessories including mirrors, police retrofitting
06000	AUTO PARTS	660877	Parts	Labor/Parts for Vehicles including labor
06003	ANTIFREEZE	660851	Maintenance	Antifreeze
08500	BAGS/BAGGING/EROSION EQUIP	660003	Supplies and Services - Other	
11500	BIOCHEMICALS/ RESEARCH	619901	Instructional Equip Under \$5k	Chemicals for use in labs
12000	BOAT/MTR/MARINE/WLDLIFE SUPL	660003	Supplies and Services - Other	Boating supplies
12500	BOOKBINDING SUPPLIES	608001	Library Books	
15500	BUILDINGS/STRUCTURES	660827	Repairs	Capital projects
16500	CAFETERIA/KITCHEN EQUIP, COM	619902	Furniture/Equipment Under \$5k	Refrigerators, ovens, other appliances for use in commercial kitchens
17500	CHEM LAB EQUIP/SUPL	619901	Instructional Equip Under \$5k	Lab supplies
19300	LAB REAGENTS TESTS	619901	Instructional Equip Under \$5k	Lab supplies
20000	CLOTHING/ATHLETIC/UNIFORMS	660815	Clothing and Safety Equipment	Athletic Clothing – Rec Center

20400	COMPUTER HRDWR & MICRO PERIPH	616903	Desk/Lap/Peripherals Under \$5k	Computer Peripherals (keyboards, webcams)
20460	MONITORS	616903	Desk/Lap/Peripherals Under \$5k	Computer monitors
20600	COMPUTER-MAINFRAME & PERIPH	616904	Servers/Peripherals Under \$5k	Server peripherals/mounting racks
20700	COMPUTER ACCESSORIES/SUPPLIES	616903	Desk/Lap/Peripherals Under \$5k	
20800	COMPUTER SOFTWARE, MICRO	616905	Software Under \$5k	Software
22000	RECORDING/MEASURING INSTRUMNTS	619902	Furniture/Equipment Under \$5k	Science/OPC
25500	DECALS STAMPS	660003	Supplies and Services - Other	Signs, promotional items
26500	DRAPERIES/CURTAINS/UPHOLSTERY	660003	Supplies and Services - Other	Drapes, Curtains, Furniture Upholstery
28000	ELECTRICAL CABLES WIRES	660827	Repairs	Electrical cabling and labor
28545	PROJECTOR LAMPS	619902	Furniture/Equipment Under \$5k	Lamps for projectors
29500	ELEVATORS ESCALATORS, BLDG	660827	Repairs	Elevator service contracts
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 Under \$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	REFRIGRATION 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	

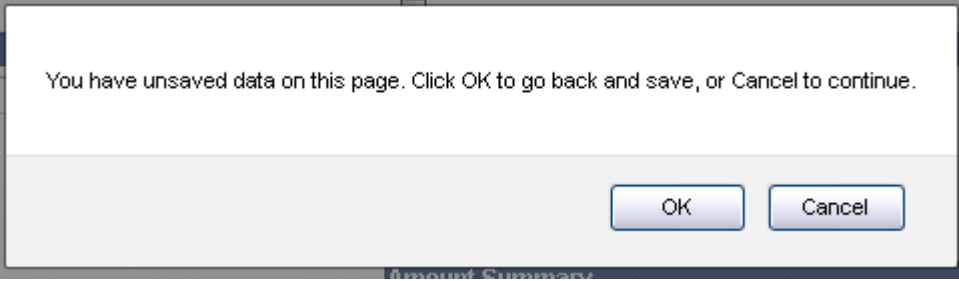
93100	EQUIP MNT/RPR APPLIANCE/ATHLTC	660827	Repairs	
93400	EQUIP MNT/RPR: LAWN/PAINTING	660827	Repairs	
93600	EQUIP MAINT/REPAIR: GEN EQUIP	660827	Repairs	
93800	EQUIP MNT/RPR: HOSP/LAB/TEST	660827	Repairs	
94100	EQUIP MAINT/REPAIR: POWER	660827	Repairs	
94500	FISHING/HUNTING/RELATED SVS	660003	Supplies 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	Vehicle Rental or Lease
97700	RENT/LEASE EQUIP SVS: HARDWARE	660825	Rentals / Leases	Computer Hardware Rental or Lease
97900	RENT/LEASE EQUIP SVS: ENG/LAB	660825	Rentals / Leases	Engineering or Laboratory Equipment Rental or Lease
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	

Appendix B: Units of Measure (UOM) and How to Use Them

Code	Description	When is the UOM used?
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

Appendix C: Error messages and resolutions

Error: There is no Green Check box when I go in to approve the requisition.	Security to approve requisitions is assigned by user.
Error: 	Press 'Ok' to go back to the page. Click the "Save" button.

Appendix D: Instructional Equipment

Account codes 619801 (over 5k) and 660813 (under 5k) are used when instructional equipment of a value greater than \$500 is purchased. In order to qualify for using these account codes, the equipment must meet the following criteria:

1. Be assigned to an instructional department (Currently 715 – 799)
2. Be owned by the campus
3. Have a shelf life greater than 2 years
4. Be exclusively used for instructional purposes.