

Processing Steps / Field Name	Screenshot / Description					
Click on either the Purchasing or CFS End User navigation tile and navigate to Add/Update Requisition.	Purchasing	CFS End User				
1. Click on Add .		CFS 22 CFS 22 CFS End User Process Monitor Requisition Agence Requisition & Purchase Order Requisition Inquiry Requisition Inquiry Requisition Inquiry Requisition Accounting Entries Add/Update Requisitions CFS End User				
Maintain Requisition Page						
2. Click on Add Comments	Add Items From ? Add Commercial Add	Status Open Budget Status Not ChKd Hold From Further Processing Summary ? Total Amount 0.00 USD Personalize Find View Ali 2 R First @ 1 of 1 @ Last s Contract Sourcing Controls Pro- s Contract Sourcing Controls Pro- 100 Category Price Merchandise Status 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				



Processing Steps / Field Name	Screenshot / Description
Add Comments Page	Header Comments
Add the following comments:	Business Unit LACMP Requisition Date 04/29/2019 Requisition ID NEXT Status Open
UNIVERSITY USE ONLY:	
Department Name, Requestor	*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort
Name, and Extension	Comments Find View All First ③ 1 of 1 ④ Last Use Standard Comments Comment Status Active Inactivate
BUILDING, ROOM NUMBER	
Chartfield (ex. 6XXXXX-SF001-	UNIVERSITY USE ONLY. Department Name, Requester Name, and Extension Chatfield (6XXXXX - Fund - Deptid - EcouPcta (optional)
5XXXXX)	
When finished aligh on the	Send to Supplier Show at Receipt Show at Voucher Show at Voucher
When finished, click on the	Associated Document Attach View Delete Email
button.	
Note: Attach the approved	OK Cancel Refresh
completed IC form on this	
page. Click on the Attach	Associated Document
button to upload your	Attach View Delete Email
document, then click on the	
ok button to return to	
the Maintain Requisitions	
page.	
Maintain Requisition Page	
	Maintain Requisitions Requisition
3. Description: Enter the	Business Unit LACN/P Status Approved
line item starting with the	Requisition Nome IC Contractor 그 Hold From Further Processing
Description of Service, and Independent	Header ① 'Requester 45203270294 Q Requester 45203270294 Q
Contractor.	*Requisition Date (M25/022 200)
4. Quantity: Enter a	Origin ONL Online Entry
quantity of '1' and UOM	Currency Code USD Dolar Amount Summary () Act M252022
Lot.	6 Reguisition Defaults Edit Comments Pre-Encumbrance 2,550,00 USD Reguisition Activities Balance
5. Price: Enter the price	Add Items From (7) Select Lines To Display (7)
(total).	Purchasing Kit Catalog Search for Lines
6. Click on Requisition	
Defaults (located to the	Line ⑦ 弓 Q
left of the Add Comments link).	Details Ship ToDue Date Status Supplier Information 4 Contract Sourcing Contro
ших <i>ј</i> .	Line Item Description 3 Quantity 'UOM Category Price Merchandise Status
	1 🗟 Q Independent 🦯 🤤 🖏 10000 LOT Q 95200 Q 500.0000 Approved 🗘 🖾 🛨 -



Processing Steps / Field Name

Requisition Defaults Page

- 7. **Override:** Click on the radio button.
- 8. **Supplier:** Enter if you have a preferred vendor. Click on

 \bigcirc to look up the supplier id.

- Category: Click on to view a list of choices (ex. 96219-Catering, 96200-Misc Serv, 92403-Spec Lec or 92401-Guest Artist). Make sure the Buyer section remains blank.
- 10. LOT = Service or open orders
- 11. Ship To: Open and Service = NOTAX
- 12. *Distribute by/*Liquidate
 by: Service = Amount
- Financial Chartfield: Enter your Dept ID and Fund.
 Program is an optional field.
 Leave the Account field blank, it will auto-populate based on the Category code chosen.
- 14. When finished, click on theokbutton. Thefollowing page will display:

ा प्र ∎ Details	Asset Informa	tion ∥▶				1:	_	
stributions								
stribution	SpeedChart	Q				Freight Terms		
Ultim	ate Use Code Attention To					Ship Via	FOB Q	
	Due Date	<u>ت</u>				Liquidate By	Amount ~	
11	Ship To	NOTAX Q	CSU, Los Angeles		12	Distribute By	Amount 🗸	
hedu	Category		9					
	Supplier	96200		0013		plier Location	LOC1 Q	
8	Buyer	0000083769	Q EAGLE T		Un	it of Measure	LOT Q	
ne		only non-blank value			10			
Override	7	If you select this opt	ion, all default values	entered on this page	e override the def	ault values four	nd in the default hierarch	У,
Default	_	applied if no other d	ion, the default value: efault values are foun his page are not used.	d for each field. If de	e are treated as p fault values alrea	oart of the defaid dy exist in the l	ulting logic and are only hierarchy, they are used,	
fault Options								
	Requisition	nit LACMP ID 0000045680			Requisition Da		2	



ONLINE REQUISITION GUIDE

For Independent Contractor Complex

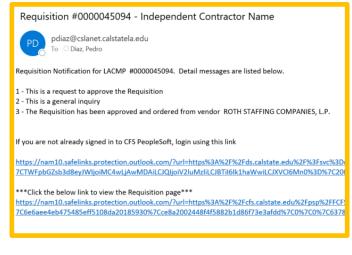
			scription				
15. Click on Mark All to check							
all the boxes and or to	Retrofit fie	ld change	s to "all" existing requisit	ion lines/schedules/d	listributions		
return to the main page.	Business Unit LACMP Requisition Date 04/26/2022						
NOTE: You can return to	Requisition ID 0000045680 Status Approved						
Requisition Defaults at any time	For the dule defaults, Select 'Apply' to apply changes to all lines and schedules. For the 15 defaults, Select 'Apply' to apply changes to the Distrib Line.						
f you add additional lines later	Exu select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition. <u>Sel</u> ect 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.						
or need to change one of these							
alues.	Retroint Pield						
	Apply≜	Distrib Line	Field Name	Field Value	Apply to All Distribs		
			Ship To	NOTAX			
			Supplier Location	LOC1			
		1	Fund	SF001			
		1	GL Unit	LACMP			
			Category	96200			
			Supplier	0000083769			
			Unit of Measure	LOT			
	ок	Cancel	Refresh				
NE-STOP NOTIFICATION Iaintain Requisition Page	Maintain Re Requisition						
laintain Requisition Page	Requisition		LACMP		Status Approved 🗙		
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Processing Steps / Field Screenshot / Description Name 16. To: Enter BFSTaxCompliance@calstat Send Notification ela.edu email address Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. **CC:** Optional field Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send. BCC: Optional field Lookup Recipient Notification Details 17. Priority: Default; do not edit To: BFSTaxCompliance@calstatela.edu 18. Subject: Include 16 1 "Independent Contractor CC: **Delivery Options** and Name" RichText 1 19. Template: Default; do not BCC: edit 17 20. Message: Add special 2-Med × Priority: instructions Ľ 18 Subject: Requisition #0000045680 - Independent Contractor 21. Click on ok to send the Requisition Notification for LACMP #0000045680. Detail 19 femplate: . email notification to the messages are listed below ONE-Stop and to return to • 1 - This is a request to approve the Requisition 1 the main page. 2 - This is a general ingu Ľ Message: NOTE: The ONE-STOP reviews IC 20 form packages that have been received for accuracy and completeness. If clarification is send this notification and exit this page. Click Cancel to exit this page without sending a notification. 21 required, the departments will to send this notification and remain on this page. be contacted via the requisition ок Cancel Apply notification process.

NOTE: The ONE-STOP reviews IC form packages that have been received for accuracy and completeness. If clarification is required, the departments will be contacted via the requisition notification process.

Email Notification Sample



NOTE: Please see **Appendix A** at the end of the document for a complete guide to the following: *Requestor Notifies Approver to Approver Req, Approver Notifies Requestor Req has been Approved, Requisition to Check Notification Process*



Processing Steps / Field Name	Screenshot / Description				
NOTE: If you have items					
that are a different category,	Maintain Requisitions				
•••	Requisition				
UOM or chartfield, change	Business Unit LACMP 22 Status Approved ×				
the row after you finish your	Business Unit LACMP ZZ Status Approved Requisition ID 0000045680 Budget Status Not ChKd 문				
requisition defaults.	Beguinitien Name				
requisition deladits.	▼ Header ⑦				
22. Budget check and approve	"Requester 45203270294 Q Diaz,Pedro				
	*Requisition Date 04/26/2022				
23. Click on the 🛛 🔚 Save	Origin ONL Q Online Entry				
button at the bottom of	Currency Code USD Dollar Amount Summary ⑦ Accounting Date 04/26/2022				
the page. Once the save is	Requisition Defaults Edit Comments Pre-Encumbrance 2,500.00 USD				
complete, the Requisition	Requisition Activities Balance Document Status				
	Add Items From ⑦ Select Lines To Display ⑦				
ID field will change from	Add terms From C Select Lines to Lispay C				
'NEXT' to the assigned	Item Search Requester Items Line Q To Q Retrieve				
requisition number. Make	Line ⑦				
note of this number.	III Q				
Contact your approver to	Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls III				
approve the requisition.	Line Item Description Quantity "UOM Category Price				
	1 🗟 🚺 🔥 Independent 🖉 🖾 1.0000 LOT 🔍 96200 🔍 500.0				
	23 e Version "Go toMore				
	Save Return to Search Previous in List Next in List Notify Refresh				
	NOTE: If any required fields are missing, you will receive a warning message. All required fields				
	will need to be filled out before the page can be saved.				