



The Requisition Inquiry page provides a tool for identified CSUF employees to view requisitions that have been created in CMS through the Requisition Data Entry page. The Requisition Inquiry page displays the status of all requisitions in CMS. **Note:** if a paper requisition was completed and submitted to Contracts and Procurement you will not be able to track its status through the Requisition Inquiry page.

Frequency: ad-hoc (as needed).

<p>Step 1</p> <p>Navigate to the REQ Inquiry page:</p> <p>Home > Fullerton Customizations > PO > REQ Inquiry</p>																																																																
<p>Step 2</p> <p>The REQ Inquiry page displays.</p> <p>Click Refresh Page to load all requisitions (no filter) entered into CMS. See <i>Note</i> below.</p> <p><i>Note:</i> Requisitions that have been Canceled will not display unless the user checks the box for Req Status Canceled.</p> <p>To view a requisition displayed under Transactions click Req ID number.</p> <p>To filter your search results, go to Step 2a.</p>	<p>Display Options</p> <p>Req Date From: [] To: []</p> <p>Req ID From: [] To: []</p> <p>Req Amount From: [] To: []</p> <p>Req Status: <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Complete <input type="checkbox"/> Canceled</p> <p>Preparer ID: []</p> <p>Requestor: []</p> <p>Approver ID: []</p> <p>Approval Date From: [] To: []</p> <p>Vendor: []</p> <p>PO Id From: [] To: []</p> <p>Req on Hold: <input type="checkbox"/></p> <p>Cancel Reason: []</p> <p>Buttons: Hide Detail <input checked="" type="checkbox"/> Refresh Page Clear</p> <p>Totals</p> <table border="1"> <thead> <tr> <th>Req</th> <th>Count</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>2</td> <td>15,825.000</td> </tr> <tr> <td>PO</td> <td>0</td> <td>0.000</td> </tr> <tr> <td>Invoice</td> <td>0</td> <td>0.000</td> </tr> <tr> <td>Remaining Balance</td> <td></td> <td>0.000</td> </tr> </tbody> </table> <p>Transactions</p> <table border="1"> <thead> <tr> <th>Req ID</th> <th>Req Dt</th> <th>St</th> <th>Cancel</th> <th>Hold</th> <th>Hold Reason</th> <th>REQ Amount</th> <th>PO ID</th> <th>St</th> <th>PO Amount</th> <th>Receipt</th> <th>St</th> <th>Invoice</th> <th>St</th> <th>Invoice Amount</th> <th>Check #</th> </tr> </thead> <tbody> <tr> <td>0000004023</td> <td>10/01/08</td> <td>O</td> <td></td> <td>N</td> <td></td> <td>5,000.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>0000004024</td> <td>10/01/08</td> <td>P</td> <td></td> <td>N</td> <td></td> <td>10,825.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Req	Count	Amount		2	15,825.000	PO	0	0.000	Invoice	0	0.000	Remaining Balance		0.000	Req ID	Req Dt	St	Cancel	Hold	Hold Reason	REQ Amount	PO ID	St	PO Amount	Receipt	St	Invoice	St	Invoice Amount	Check #	0000004023	10/01/08	O		N		5,000.00										0000004024	10/01/08	P		N		10,825.00									
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You can filter your search results by entering one or more fields on this page.

Note: You are not required to enter any fields. All fields on this page are optional.

Any field with allows you to view a list of valid values.

Any field with allows you to select a date.

Step 2a

When you have entered information in one or more of these fields, click [Refresh Page](#). The information you enter narrows down the results. The new information will display under **Transactions**.

To clear any entries in the Display Options section, click [Clear](#).

Hide Detail hides the transactions associated with the requisition, i.e. multiple Receipts, Invoices, Payments and Checks

Display Options		Totals	
Req Date From	<input type="text"/> To <input type="text"/>	Count	Amount
Req ID From	<input type="text"/> To <input type="text"/>	Req	0 0.000
Req Amount From	<input type="text"/> To <input type="text"/>	PO	0 0.000
Req Status	<input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Complete <input type="checkbox"/> Canceled	Invoice	0 0.000
Preparer ID	<input type="text"/>	Remaining Balance	0.000
Requestor	<input type="text"/>		
Approver ID	<input type="text"/>		
Approval Date From	<input type="text"/> To <input type="text"/>		
Vendor	<input type="text"/>		
PO Id From	<input type="text"/> To <input type="text"/>		
Req on Hold	<input type="checkbox"/>		
Cancel Reason	<input type="text"/>		
<input type="button" value="Hide Detail"/> <input type="button" value="Refresh Page"/> <input type="button" value="Clear"/>			

Field	What do I need to enter?														
Req Date From/To	Optional entry. The date(s) the requisition was created in CMS.														
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Hide Detail	Optional entry. Hides the transactions associated with the requisition. See sample on page 3.														




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The Transactions section lists all requisitions based on the criteria selected in the Display Options section within your security access.

These transactions are separated into two tabs:

Documents (shown here)
Reference (see next page)

Click  to view all fields together.

Transactions									
Documents					Reference				
Req ID	Req Dt	St	Cancel	Hold	Hold Reason	REQ Amount	PO ID	St	PO Amount
0000003165	02/12/08	C		N		5,193.55	0000002028	D	4,820.00
0000003111	02/06/08	C		N		287.34	0000001976	C	287.34
Receipt	St	Invoice	St	Invoice Amount	Check #	Check Dt	Check Amount		
		INV204793	P	4,820.00	041892	05/09/08	4,820.00		
		423260484001	P	287.34	041844	05/09/08	287.34		

Term	Definition
Req ID	The requisition ID number automatically assigned in CMS once the requisition has been saved.
Req Date	The date the requisition was created in CMS.
St	Displays the status of the requisition: Open, Pending, Approved, Complete or Canceled.
Cancel	Date of cancellation for the requisition.
Hold	Date of hold for the requisition.
Hold Reason	Reason for the hold of the requisition.
REQ Amount	The total requisition amount.
PO ID	Purchase order number assigned once Purchasing has created PO in CMS.
St	Purchase Order Status. D = Dispatched to the Vendor X = Canceled C = Closed
PO Amount	Amount of PO including any freight or sales tax.
Receipt	Number assigned to the receiving transaction.
St	Status of received good. P = Partial R = Complete
Invoice	Invoice number on Vendor invoice.
St	Invoice Status. P = Posted C = Closed D = Deleted
Invoice Amount	Amount on Vendor invoice.
Check #	Check number issued to Vendor.
Check Date	Date check was issued.
Check Amount	Amount appearing on the check.



Click on [Reference](#) to view additional details about the requisition.

Transactions								Find
Documents		Reference						
Req ID	Req Dt	Preparer	Requestor	Approver	Appr Date	Buyer	Name 1	
0000003165	02/12/08	Nguyen, Hien	HIEN NGUYEN	Torres, Mary Ann	02/12/2008	Reeson, Donna	TROY GROUP INC	
0000003111	02/06/08	Nguyen, Hien	HIEN NGUYEN	Torres, Mary Ann	02/06/2008	Muniz, Hector	OFFICE DEPOT	

Term	Definition
Req ID	The requisition ID number automatically assigned in CMS once the requisition has been saved.
Req Dt	Date the requisition was created in CMS.
Preparer	The individual who prepared the requisition.
Requestor	The individual who requested the requisition (may be different than preparer).
Approver	The individual who approved the requisition
Appr Date	Date requisition was approved.
Name 1	Name of Vendor on requisition.



The following table is a list of CMS field names and their definitions used throughout this guide.

Field	Definition														
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Req Date From/To	The date the requisition was created in CMS.														
Req ID From/To	The requisition ID number automatically assigned in CMS once the requisition has been saved.														
Req Amount From	The total requisition amount.														
Req Status	The status of the requisition. Options are: Open, Approved, Complete or Canceled.														
Preparer ID	The individual who prepared the requisition.														
Requestor	The individual who requested the requisition (may be different than preparer).														
Approval Date From/To	Date requisition was approved by approver.														
Approver ID	The individual who approved the requisition														
Vendor	Name of vendor on requisition.														
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Hide Detail	Optional entry. Hides the transactions associated with the requisition.														
Totals															
Req	Total dollar value of requisitions displayed based on the search criteria entered.														
PO	Total dollar value of Purchase Orders based on the search criteria entered.														
Voucher	Total dollar value of vouchers based on the search criteria entered.														
Check	Total dollar value of checks created based on the search criteria entered.														
Remaining Balance	Total dollar value of remaining PO balance based on the search criteria entered (PO-Invoice).														
Count	Total count of Req, PO, Invoice, and Check based on the search criteria entered.														
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Transactions – Document Tab	
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