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Overview

Requisition is one of the Procurement Pathways for campus departments to follow when buying goods and services. Prior to ordering or purchasing items/services, refer to Procurement Pathways for the appropriate process to follow.

A requisition is created in Financial Transaction Services (FTS) and once approved, it is distributed from FTS to the Common Finance System (CFS). In CFS, Procurement will process the requisition by obtain pricing and availability for the items requested, then converts the requisition into a purchase order and sends it to the supplier. Refer to Finance Requisition for detailed information about this pathway and for average processing time for Requisition to Purchase Order.

This guideline will demonstrate how to complete and approve a Requisition in FTS.

Training

Administrative staff are required to completed the Introduction to Finance class
(Course No.: FIN009) if they need access to the Finance systems: CFS, CFS Data Warehouse

Approving Officials are required to complete the Finance Overview for Managers class (Course No.: FIN007). Enroll in a session in SJSU@Work.

Refer to Courses for more information about training offered by Finance.

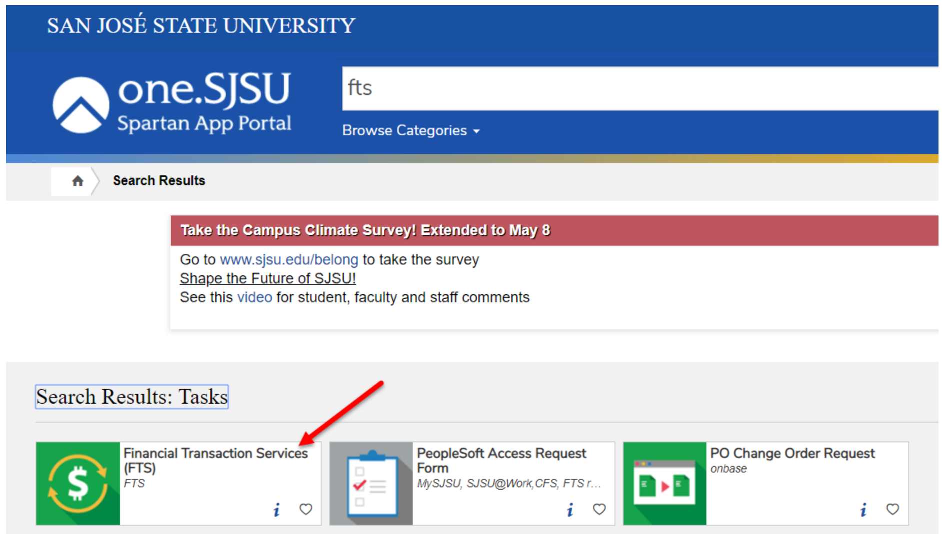
Request Access to FTS

After completing the required Finance course, access to Finance systems: CFS, FTS, and CFS Data Warehouse can be requested by completing the Finance Systems Access Request form (DocuSign).

Log into FTS

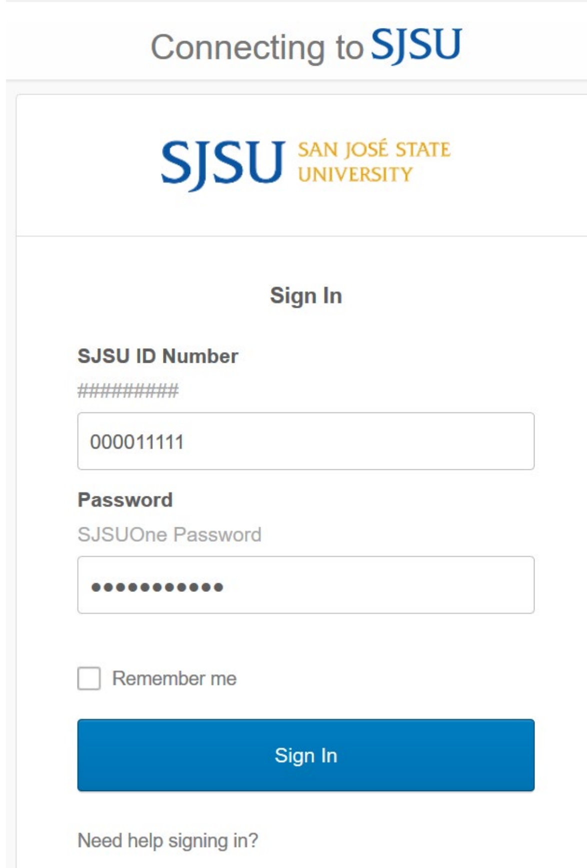
Use your SJSUOne account to login to FTS and with DUO app or FOB key. If you do not know your SJSUOne login information or need assistance with DUO, contact IT Help Desk for assistance- website: http://its.sjsu.edu/services/sjsuone/ email ithelpdesk@sjsu.edu / or phone 4-1530.

1. Go to one.SJSU.edu.
2. Search for and click on **FTS** tile.



The SJSUOne login page displays.

3. Enter your **SJSUOne ID** and **Password**.
4. Click **Log In** button.
5. You will be prompted to confirm login with DUO app on your smartphone or with DUO FOB key.

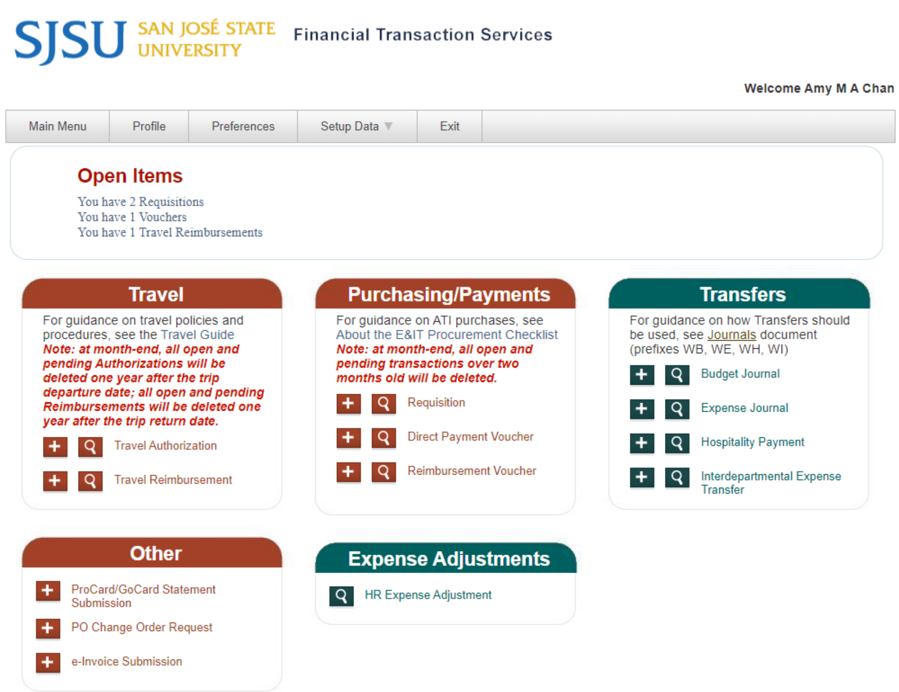


The Main Menu displays.

The Main Menu page displays a list of all **Open Items** for the DeptIDs the user has access to.

1. The Main Menu page also displays the other menus:

   - **Travel** (All SJSU employees have access this module.)
   - **Purchasing/ Payments**
   - **Transfers** (Depending on your system access.)
   - **Other** (All SJSU employees have access to this module.)
   - **Expense Adjustments** (Depending on your system access)

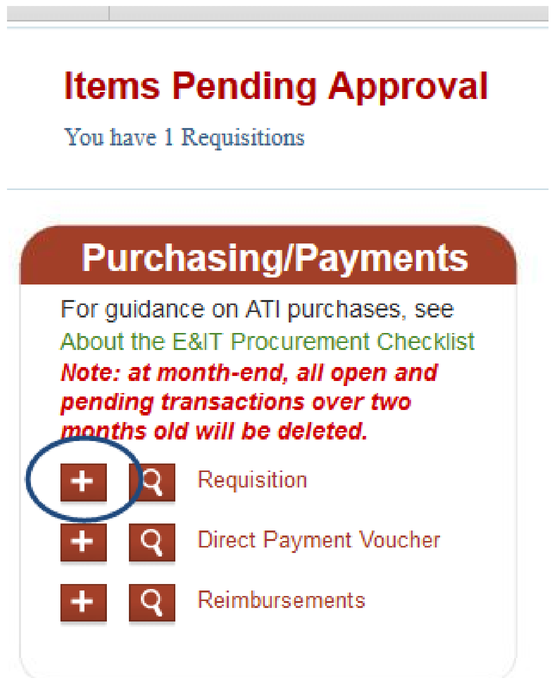


Create a Requisition

The following instructions will go through the steps of creating a requisition, the approval process, and completing a split distribution if an item is being paid for by two chartfield string.

Purchase/Payments Module

1. Click the  icon to add a new requisition.

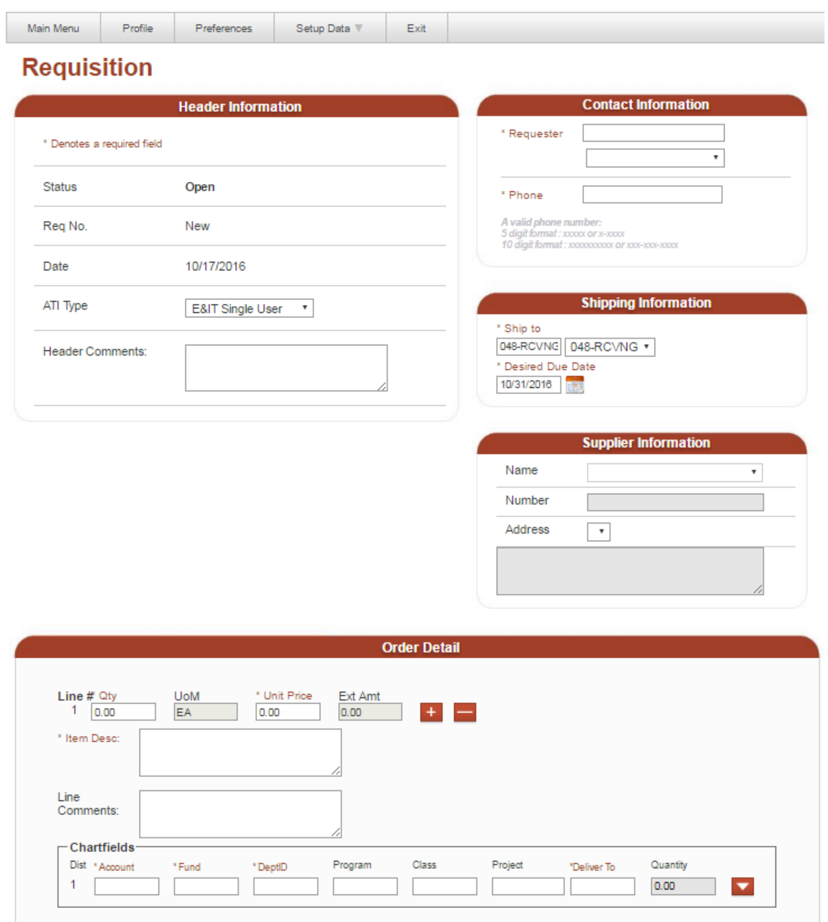


The Requisition page displays.

Note: *Red labels with asterisks indicate required fields.*

The Requisition page has five sections:

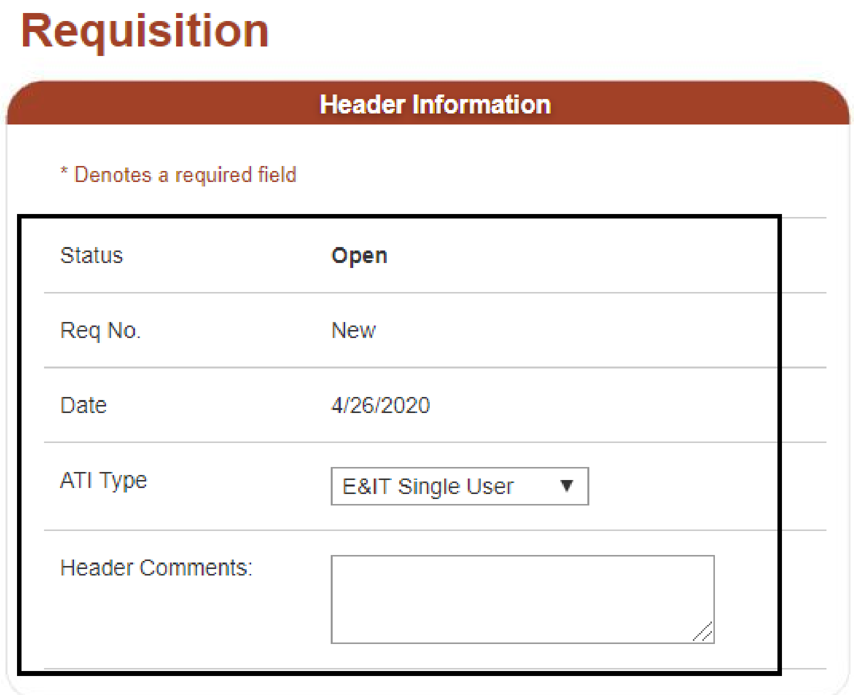
- **Header Information**
- **Contact Information**
- **Shipping Information**
- **Supplier Information**
- **Order Detail** (including **Chartfields**)



Header Information

This section displays the following fields:

- **Status:** There are seven statuses in the requisition process-
  - **Open:** Requisition created, but has not been submitted for approval.
  - **New:** Displays after requisition is saved.
  - **Pending Approval:** Requisition has been submitted to the department Approver for review and approval.
  - **Approved:** Department Approver approves request.
  - **CF Approval**: A second approval from the Central Finance Officer is required for requisitions of $50,000 or more. This status appears after the department Approver approves request.
  - **CF Approved**: For requisitions of $50,000 or more, this status displays after Central Finance Officer approves request.
  - **Cancelled**: Request is cancelled either by the department requester or department/CF Approving Official.
- **Req No:** Number will be assigned when requisition is saved.
- **Date:** Creation date.



ATI Type: Accessible Technology Initiative (ATI) reflects the CSU's ongoing commitment to provide access to information resources and technologies to individuals with disabilities.

Review for ATI compliance applies to electronic and information technology products (**E&IT**) that will be used by a broad audience such as in a classroom by students or in a public area by guests of the university.

E&IT are products that are electronic, and display and/or convey information. E&IT products include software, computer/laptop/tablet, software and tv/monitor.

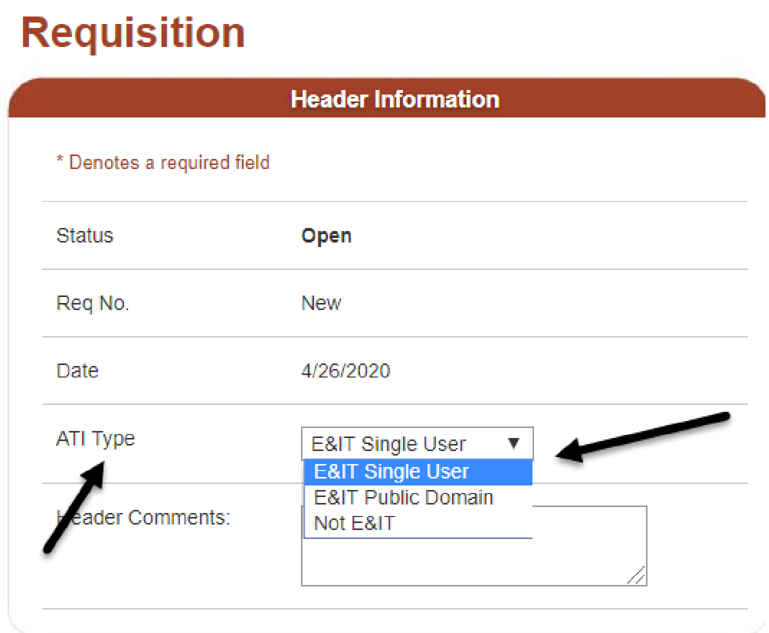
Refer to [Accessible Technology Initiative] for instructions on buying E&IT products.

2. From the dropdown menu, select the appropriate **ATI Type** for request-

   - **E&IT Single User:** Product will be used by an employee.

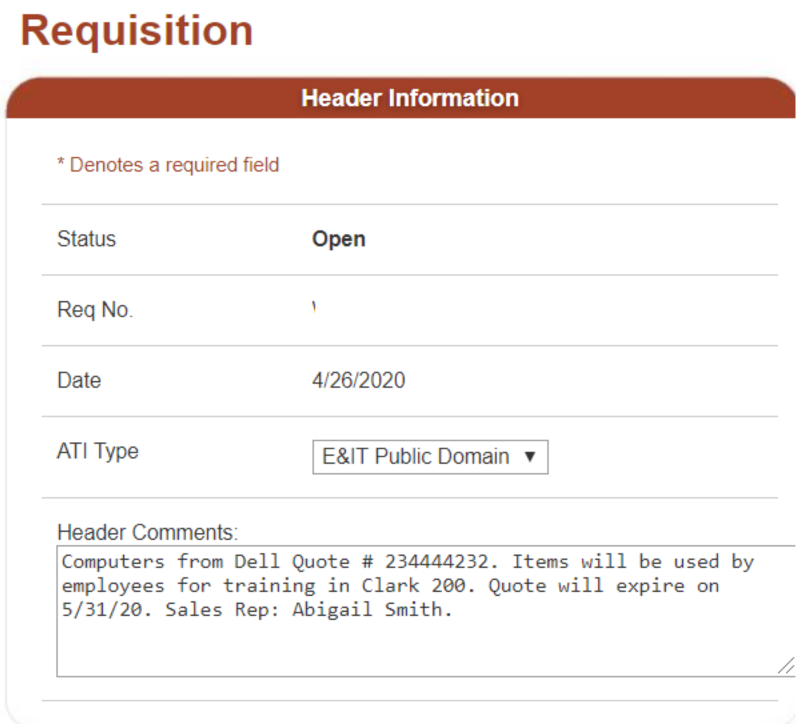
   - **E&IT Public Domain:** Product will be used by a broad audience (e.g. by students and guests/public).

   - **Not E&IT:** Product is not electronic and information technology related.



3. Enter **Header Comments** (if needed).

   Use this field to provide special instructions to Procurement or additional information about the order.

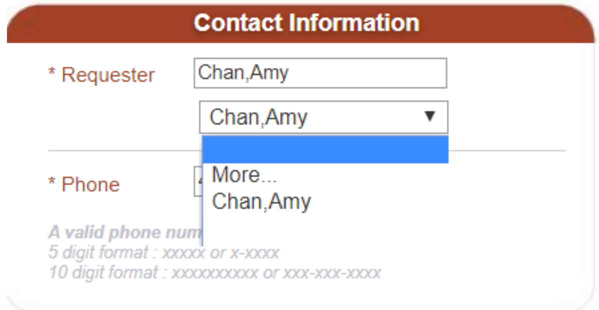


Contact Information

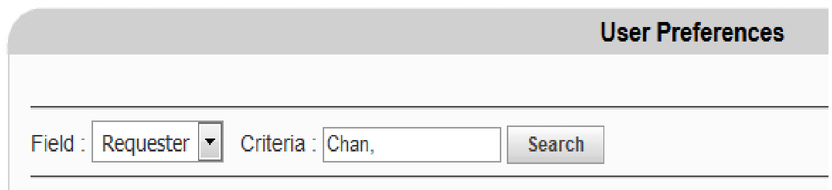
4. Select the **Requester** from the dropdown menu (User Preference List). Do not key in the name.

5. If Requester is not in your dropdown menu, select **More** option.

   ***Note**: Turn off web browser's pop-up blocker first.*



User Preferences Search Criteria box appears.

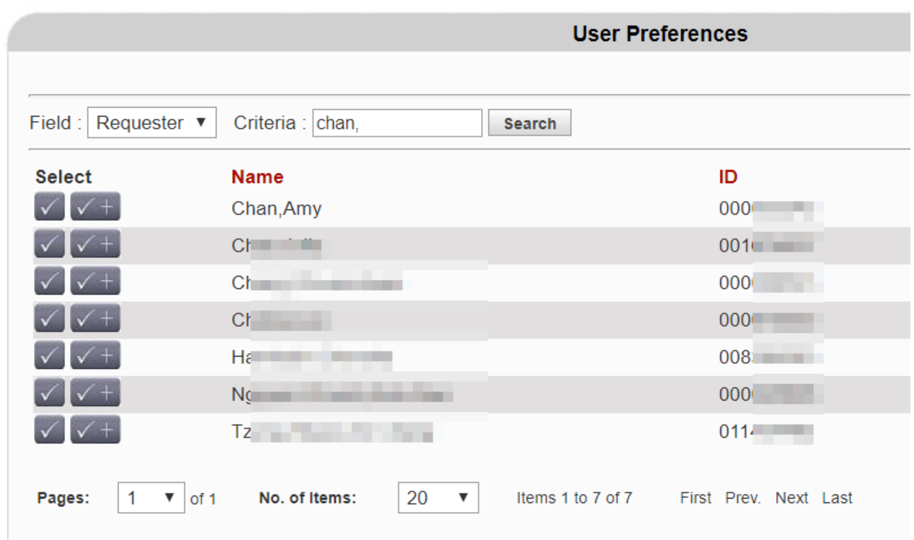


6. Enter the Requester's (full or part of name) or Employee ID number.

   To search by name, start with last name and comma at the end of it. For example: Chan,Amy or Chan,

7. Click **Search**.

Search Results appears.



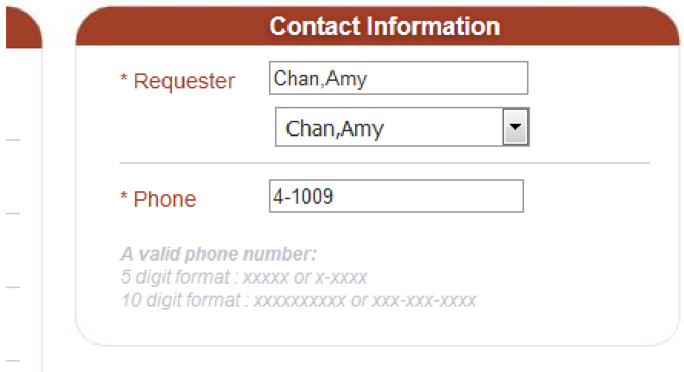
8. Click the icon to use the requester for this transaction only

   or

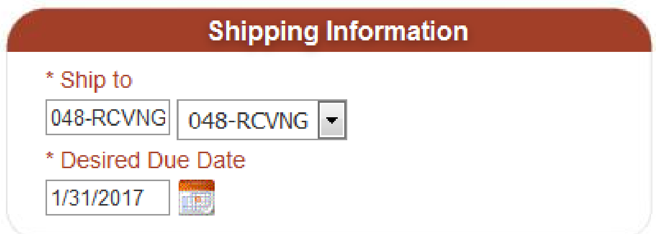
   click the icon to use the requester for this transaction and add it to your dropdown menu (User Preferences List) for field.

   ***Note**: If name is not found, please contact Finance Support by email at financeconnect@sjsu.edu for assistance.*

9. Enter the Requester’s **Phone** number.



Shipping Information



10. **Ship to:** Defaults to 048-RCVG (central receiving for SJSU campus)

    or

    for departments located off-campus such as Athletics and Moss Landing Marine Lab, select **More** to choose the appropriate central receiving area.

11. **Desired Due Date:** Defaults to two weeks from the current date, but the field can be edited.

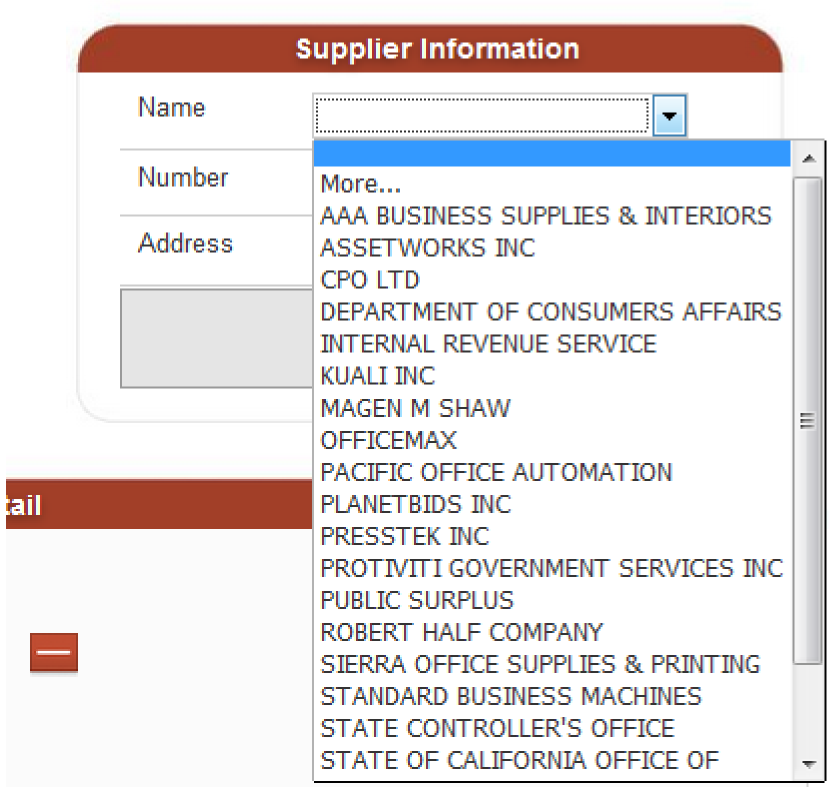
Supplier Information

12. Select the supplier from the **Name** dropdown menu (User Preferences List)

    or

    if supplier is not in your dropdown menu, then click on **More**.

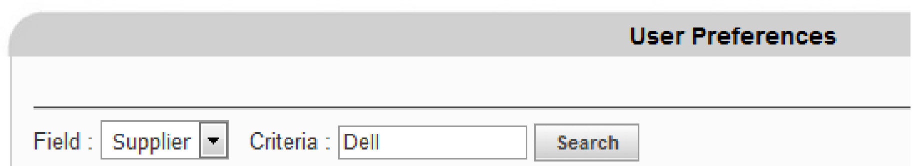
    ***Note**: The **Name** field cannot be left blank.*



If More is selected, User Preferences Search Criteria panel appears.

13. In **Criteria** field, enter Supplier's name (full or part of it).

14. Click **Search**.

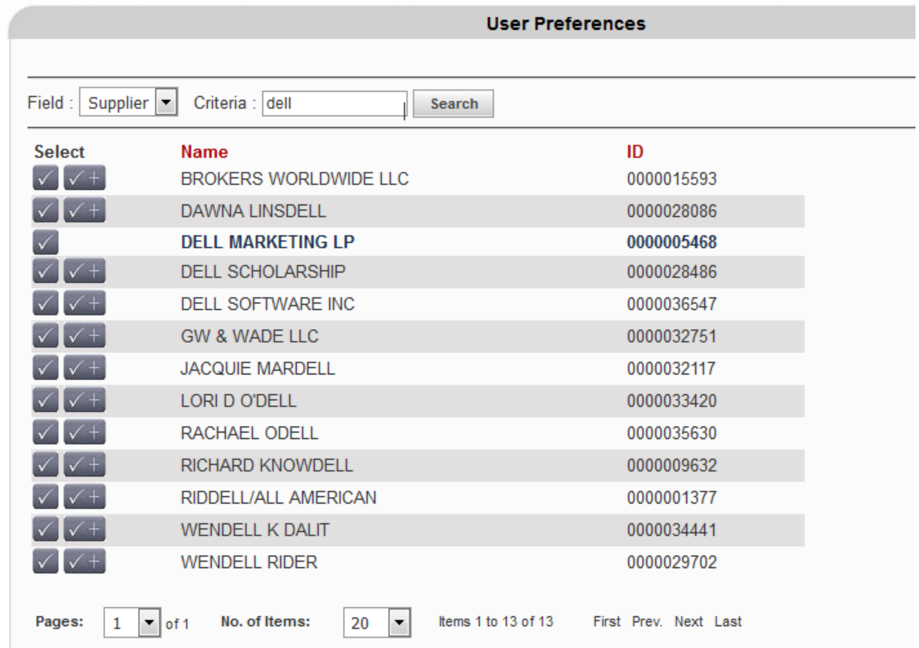


The Search Results appears.

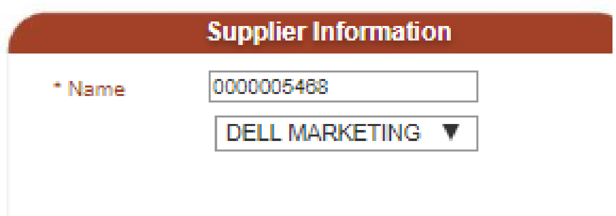
15. Click the icon to use the supplier for this transaction only

or

The icon to use the supplier for this transaction and add it to your dropdown menu (User Preferences List) for the field.



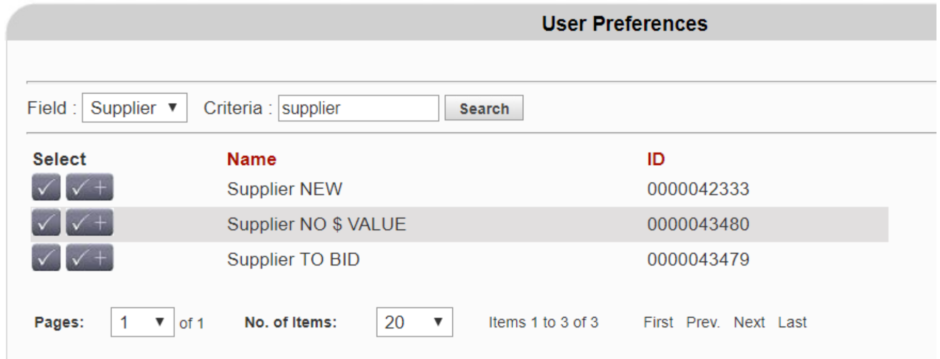
Supplier is selected.



Note: *Procurement will determine the correct address to send the purchase order to.*

If you have special instructions, do provide that in the ***Header Comments*** *field of the requisition.*

16. If the Supplier **is not** in FTS, then select one of the following as the Supplier:



- **Supplier NEW** (ID 0000042333): Select this supplier ID when you've identified a supplier you intend to do business with **AND** the supplier ID does not exist in FTS. You will be prompted to complete the invitation request form in PaymentWorks.

- **Supplier TO BID** (0000043480): Select this one if supplier is unknown or purchase meets/exceeds CSU's threshold or requires competitive bidding.

- **Supplier NO $ VALUE** (0000043479): Select this supplier when submitting a requisition for a contract or a document that requires the signature of the University, but it has no dollar value. Example: free services and products and internship/student placement agreements.

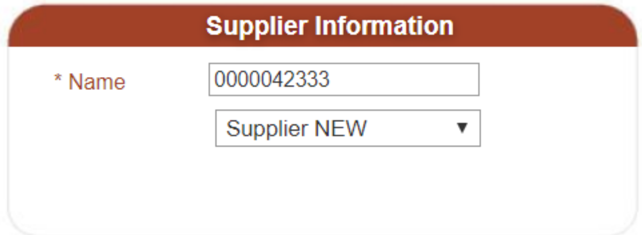
17. **Skip to Step 24 if** you selected one of the following in Supplier Information:

- a Supplier that already exists in FTS

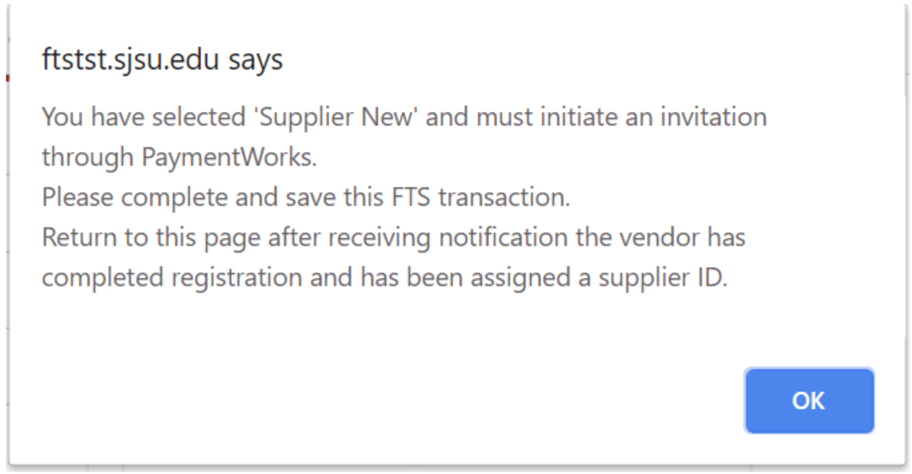
- **Supplier TO BID**

- **Supplier NO $ VALUE**

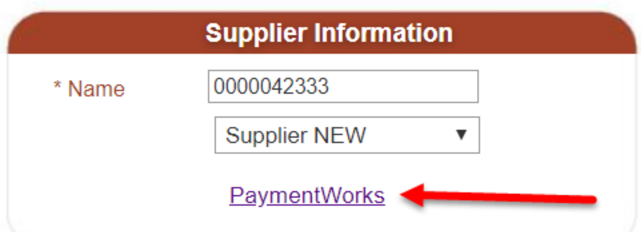
18. If **Supplier NEW** was selected, pop-up message will appear requesting you to complete the invitation request form in PaymentWorks.



19. Click **OK**.

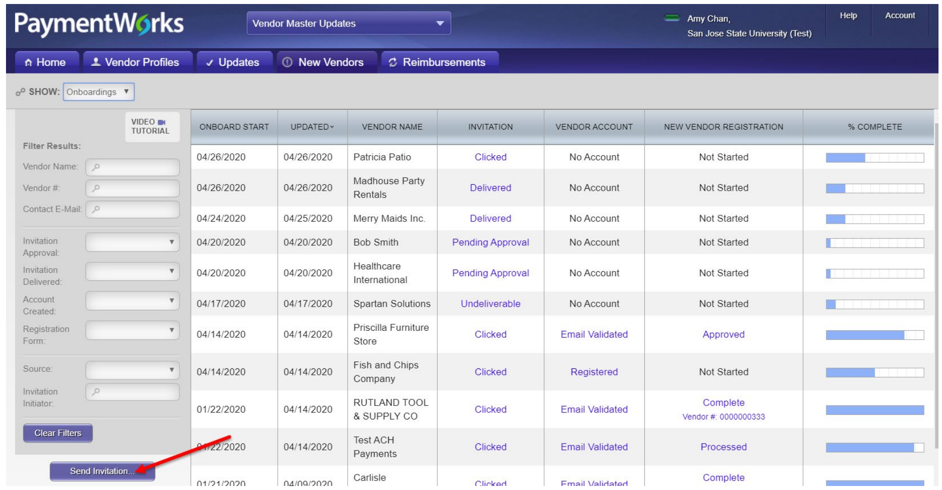


20. Click on the **PaymentWorks** hyperlink appears.



PaymentWorks opens.

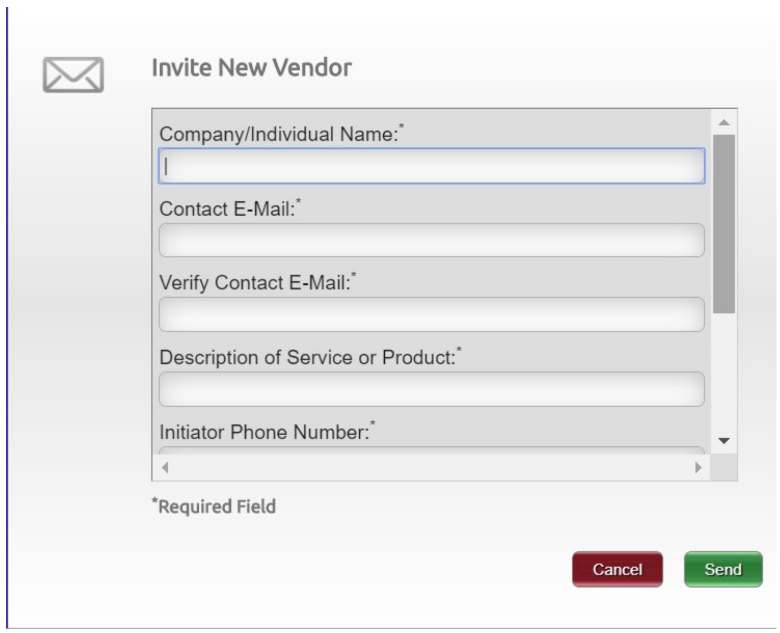
21. Click **Send Invitation**.



Invite New Vendor window displays.

22. Complete the following fields:

- **Company/Individual Name**
- **Contact E-Mail**
- **Verify Contact E-Mail**
- **Description of Service or Product**
- **Initiator Phone Number:** Your phone number; not the supplier.
- **Personalized Message:** Optional. Enter a message for the Accts. Payable Vendor Maintenance Coordinator. This message will not be shared with the supplier.



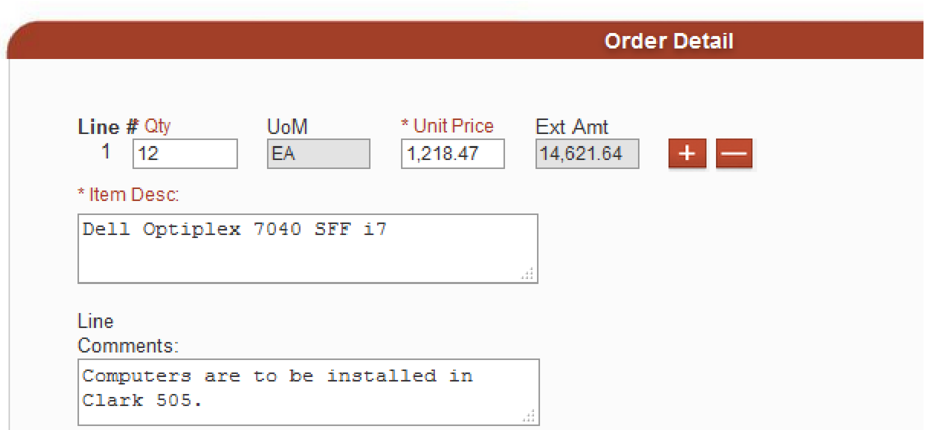
23. Click **Send**.

An email invitation will be sent to the Supplier to register in PaymentWorks.

Order Detail

24. Create a line for each product or service by entering values in following fields:

- **Quantity:** Number you want to request for the item.
- **Unit Price:** Price for each quantity.
- **Item Desc:** Provide full description of item to order (e.g. brand name, model number, and supplier's item number, service period).
- **Line Comments:** If needed, enter additional information about the line item.

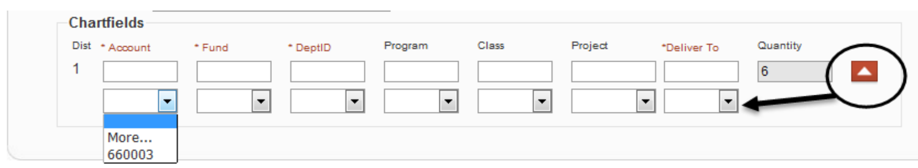


***Note**: Maximum character limit in Item Desc field is 250. If you enter more than 250, you'll receive an error message when you save.*

*If you require more than 250 characters to describe an item, then use **Line Comments** to continue your description. Do no use Line Comments for general information. General information pertaining to entire order should be entered in the **Header Comments** field.*

Order Detail- Chartfields

25. Use the  to show/hide the dropdown boxes below fields.



26. Select chartfield values from the dropdown menu (User Preference List). This is where the expense will be charged.

- **Account**
- **Fund**
- **DeptID**
- **Program** *(optional)*
- **Class** *(optional)*
- **Project** *(optional)*

or

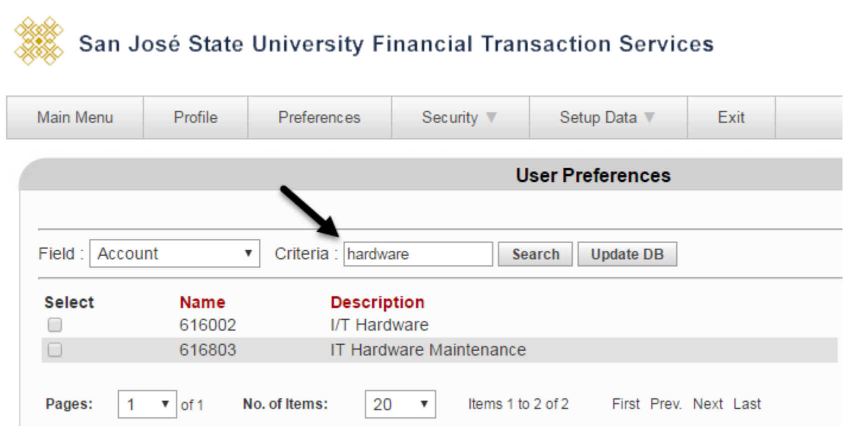
if value is not in your User Preferences List, click on the **More** option.

***Note**: If there are multiple chartfields for a requisition line, please refer to the Split Distribution section for instructions.*

If More is selected, User Preferences search criteria panel appears.

27. In **Criteria** field, enter the Account code or account description (full or partial name).

28. Click **Search**.

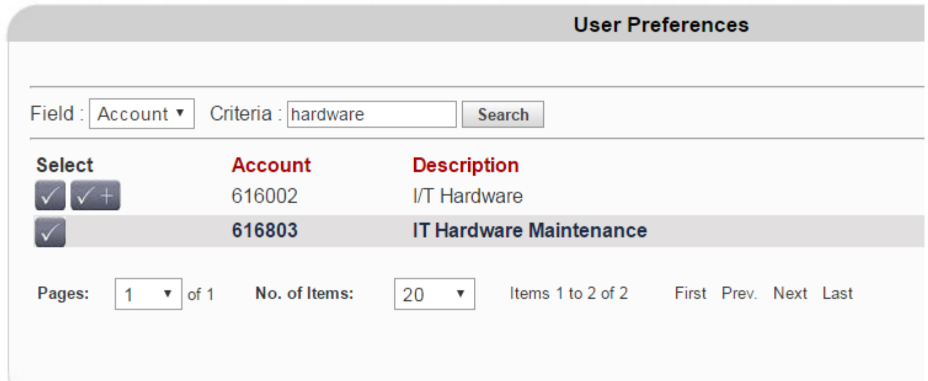


The Search Results appears.

29. Click the  icon to use the value for this transaction only

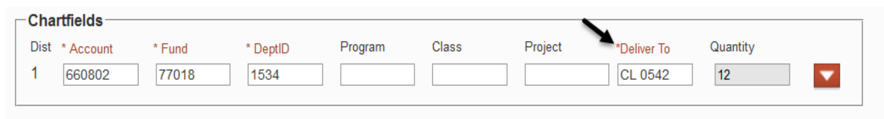
    or

    The  icon to use the value for this transaction and add it to your dropdown menu (User Preferences List) for the field.



30. In **Deliver To**, select department delivery location from the drop dropdown menu (User Preferences List).

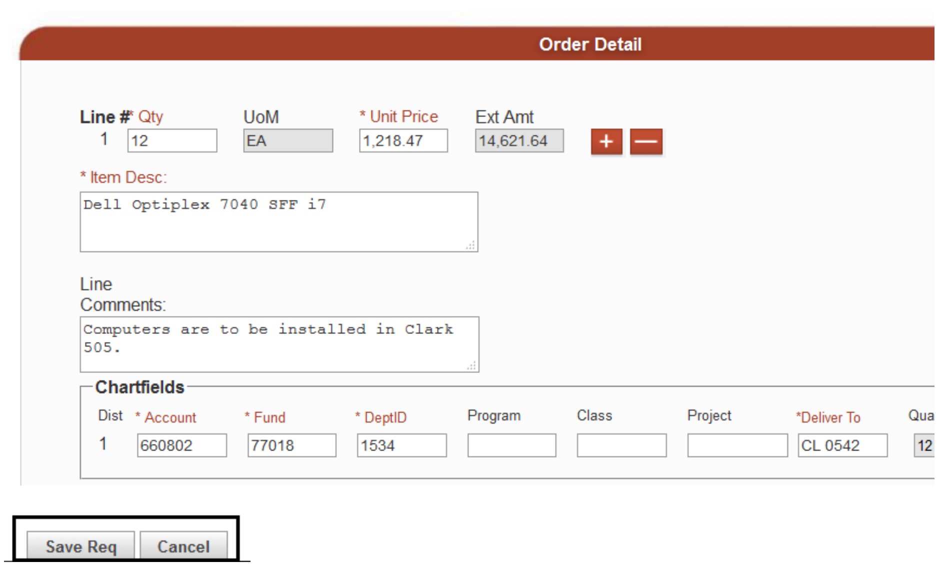
    ***Note**: Locations in the **User Preferences List** are ones that Distribution Services have determined as the main delivery site for a department or building.*



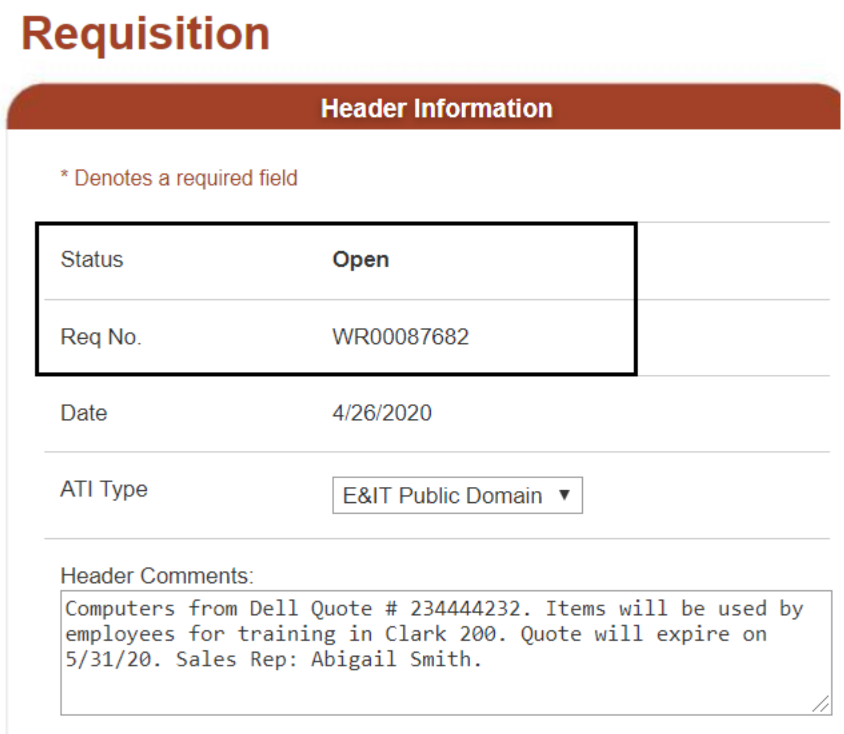
31. Click **Save Req** to save entry

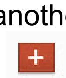
    or

    Cancel the requisition and the page becomes read-only and **Status** changes to Cancelled.



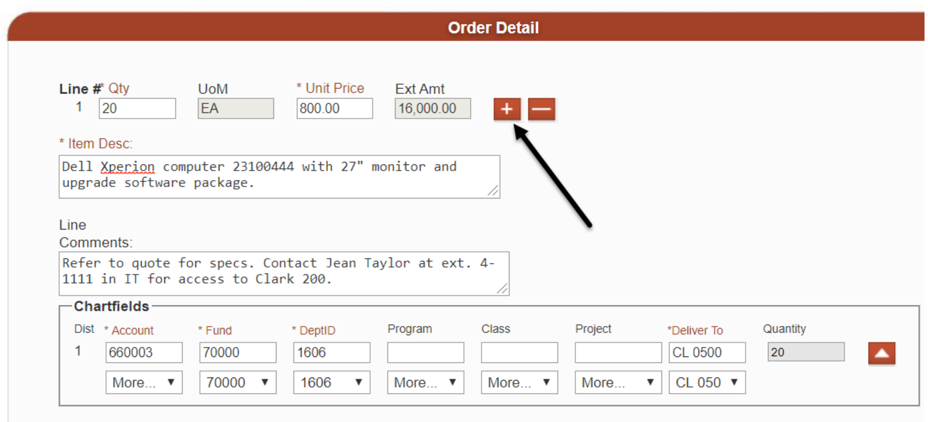
If the requisition is successfully saved, a Req No. will be assigned by the system. Record the Req. No. for your reference.



32. To add another requisition line, click the  icon.

__Note:__ Do not create a requisition line for sales/use tax. Procurement will determine the appropriate tax for the order.

Create a new requisition line if freight/shipping is $200 or more. Accounts Payable requires a freight bill from the supplier if delivery is made by a non-common carrier (e.g. UPS or FedEx). Refer to Invoice Criteria for more information about invoice requirements.



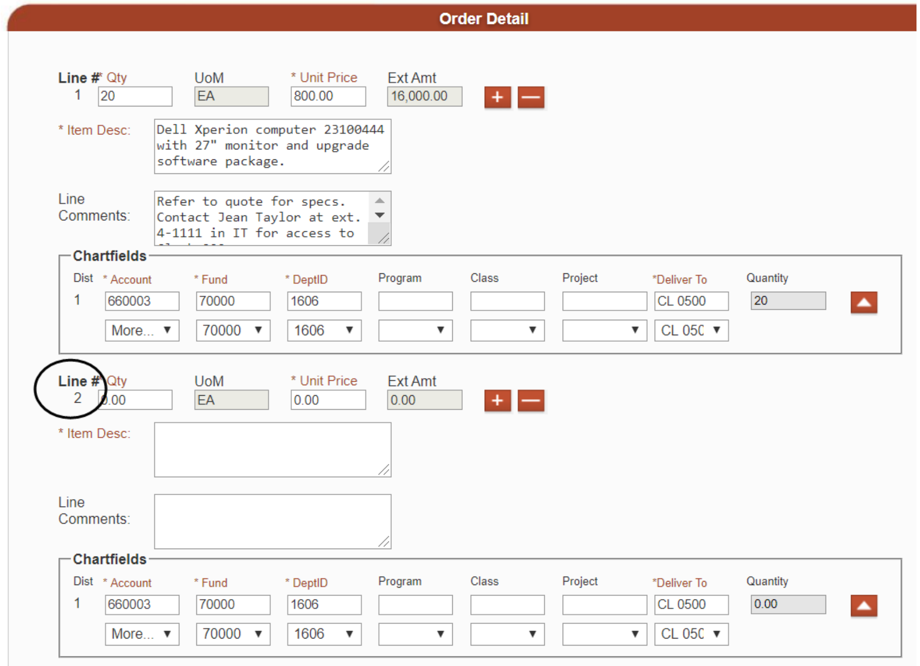
A new requisition line added.

33. Click + icon to add another requisition line. You can add as many lines as needed.

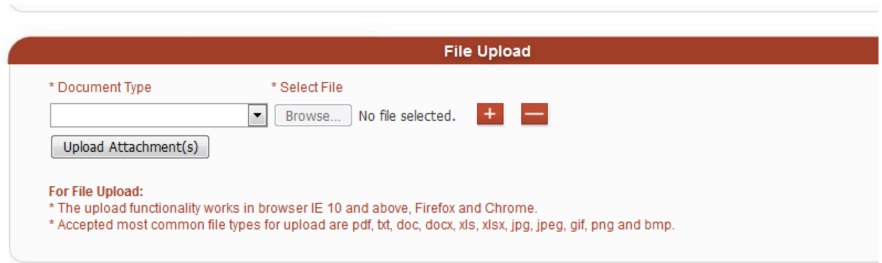
or

— icon to delete a requisition line.

Repeat steps 24 to 33 for next requisition line as needed.



The File Upload section appears when the requisition is saved.



If any, upload support backup documentation pertaining to this request. Documentation can include:

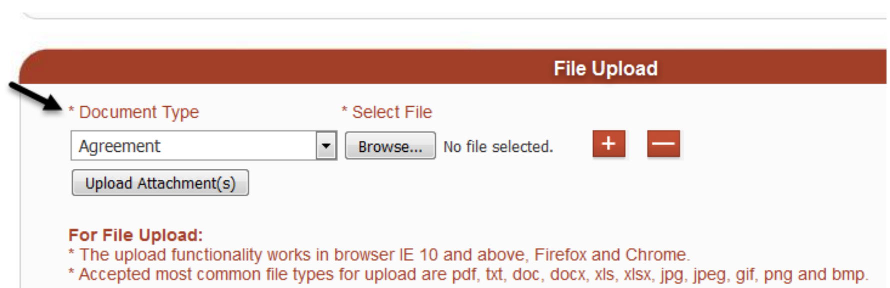
- Scope of Work form
- Quote/estimate
- Printout of webpage showing product specification
- Correspondence
- Unsigned contract/agreement
- Vendor Data 204 Form

***Note**: A file can include multiple pages, but we recommend users create a separate file for each document type. This will help users easily identify and retrieve files to view.*

***Important:** If uploading an invoice, it will serve as a backup documentation for the Requisition. **It will not be forwarded to Accounts Payable by Procurement for payment**.*

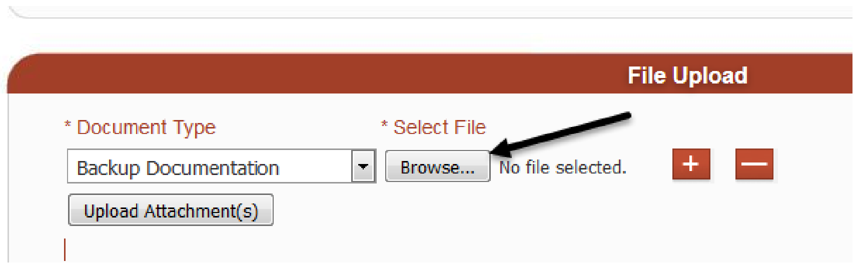
*For payment, users are to send the invoice to Accounts Payable online using e-Invoice **after** the purchase order is issued.*

Upload backup documentation.



34. **Document Type**: Select description for file from the dropdown menu.

35. Select file by clicking **Browse**.



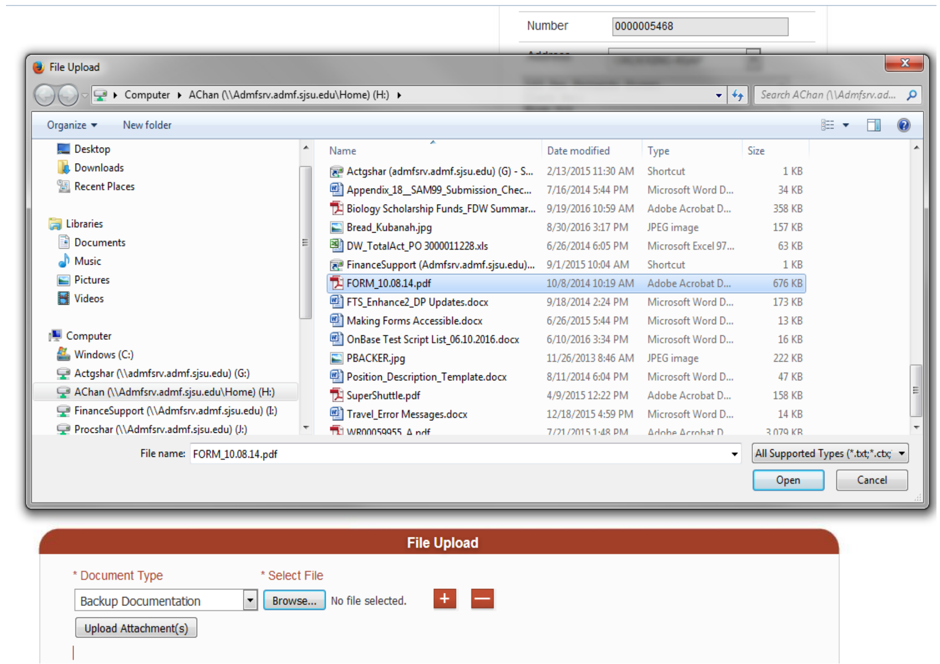
File Upload panel appears.

36. Select file to upload from your desktop.

Note: File names cannot contain special characters such as #, $, and %.

Accepted file formats: pdf, txt, doc, docx, xls, xlsx, jpg, jpeg, gif, png, and bmp.

37. Click **Open**.

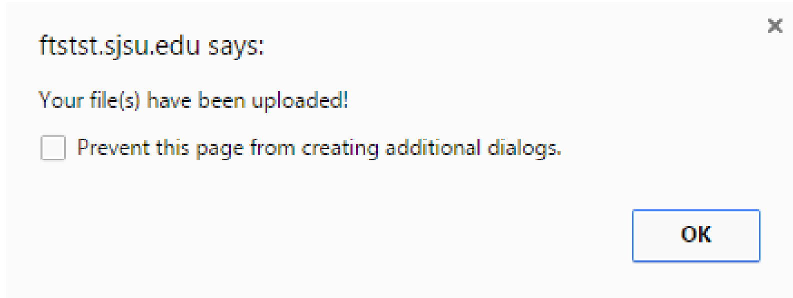


The file name displays.

38. Click **Upload Attachment(s)** to complete the upload process.

Message appears to confirm file has been uploaded.

39. Click **OK** to continue.



40. To upload more files, click and repeat steps 34 to 40.

or

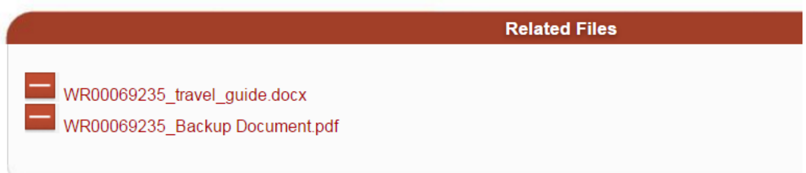
to delete an uploaded file.

File(s) uploaded will be listed in Related Files section.

41. Click hyperlink for a file to open document

or

to delete file.



Additional buttons appear at bottom of Requisition page.

*If **Supplier NEW** is selected as the Supplier, then you can only Save Req. The requisition **cannot** be submitted for approval until the Supplier completes registration in PaymentWorks. Skip to [Supplier New: After Supplier Completes Registration] section for instructions.*

42. For Supplier **other than** Supplier NEW, click the appropriate button:

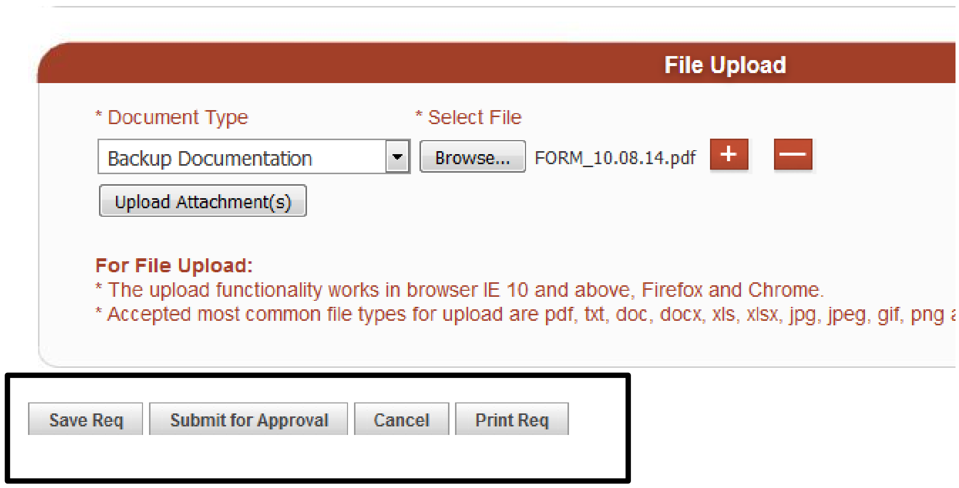
- **Submit for Approval**: The requisition **Status** will change to **Pending Approval**.

  An email notification will go to the Approving Official(s) who has access to the DeptID listed in the requisition. Approver will go into FTS to review and approve request.

  Important: *If the primary Approving Official is not available, please directly contact the next Approver. For example, if the Department Chair is unavailable to approve, then contact the approver in the Dean's Office to do so.*

- **Cancel**: A message will appear asking if you want to cancel the request. Requisition will be cancelled and page becomes read-only. The requisition Status will change to **Cancelled**.

- **Print Req**: Use to print the requisition for your records. We recommend you use this feature to print instead of the web browser's print feature.

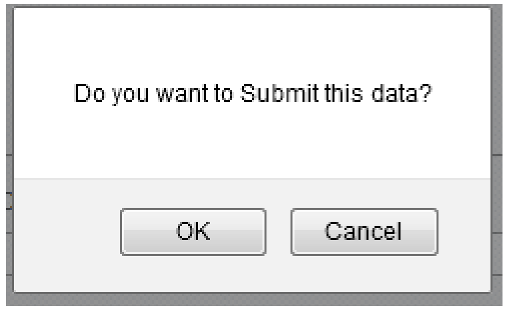


If **Submit for Approval** is selected, a message box appears asking if you want to submit the data.

43. Click **OK** to submit for approval

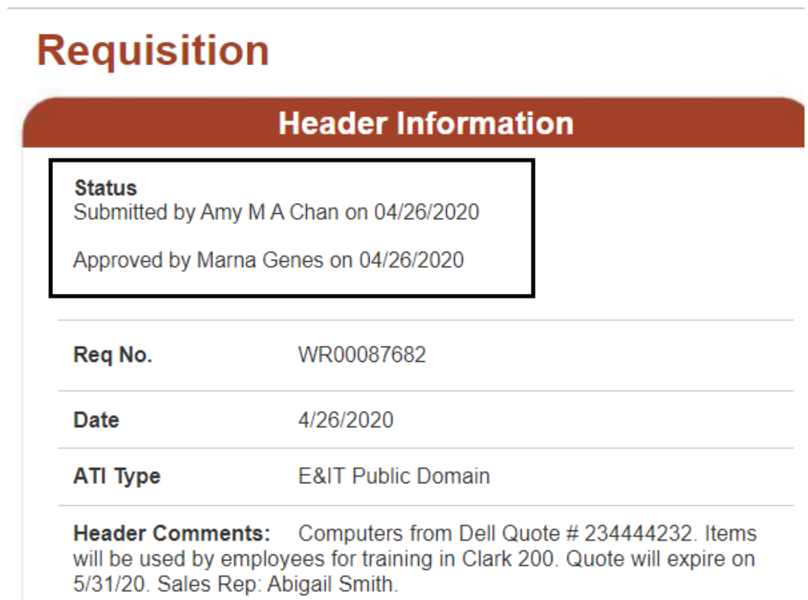
    or

    Cancel to return to Requisition page.



In Header Information, the Status section displays the activity history for the request.

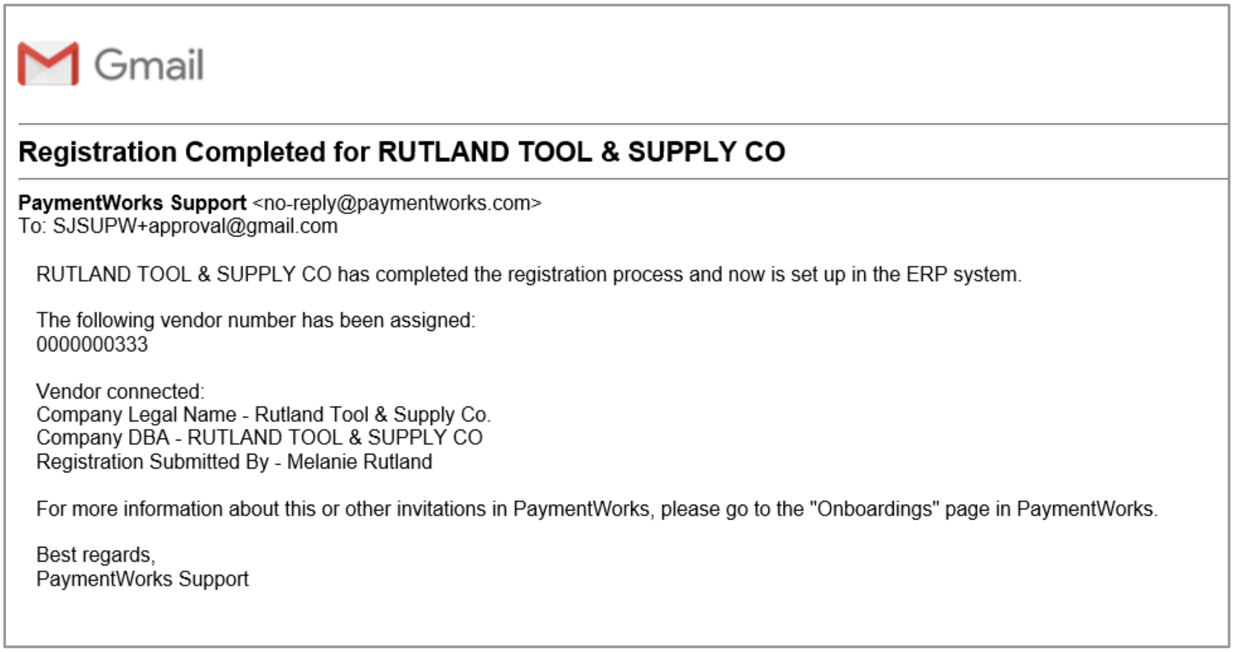
Once Approving Official has approved, Status will display Approved and name of Approver and approval date. Request will feed to CFS for Procurement to process into a Purchase Order (PO).



Supplier New: After Supplier Completes Registration

If **Supplier NEW** was selected in the Supplier Information on the requisition, the supplier will receive the invitation and complete their registration with PaymentWorks. After completion, the Initiator (department Requester) will receive an email informing them the supplier has completed their registration and they have been added to CFS.

This is an email to the Initiator informing them the supplier has completed onboarding. The email includes the supplier's DBA, legal name, and the CFS Supplier ID.


Gmail

Registration Completed for RUTLAND TOOL & SUPPLY CO

PaymentWorks Support <no-reply@paymentworks.com>
To: SJSUPW+approval@gmail.com

RUTLAND TOOL & SUPPLY CO has completed the registration process and now is set up in the ERP system.

The following vendor number has been assigned:
0000000333

Vendor connected:
Company Legal Name - Rutland Tool & Supply Co.
Company DBA - RUTLAND TOOL & SUPPLY CO
Registration Submitted By - Melanie Rutland

For more information about this or other invitations in PaymentWorks, please go to the "Onboardings" page in PaymentWorks.

Best regards,
PaymentWorks Support

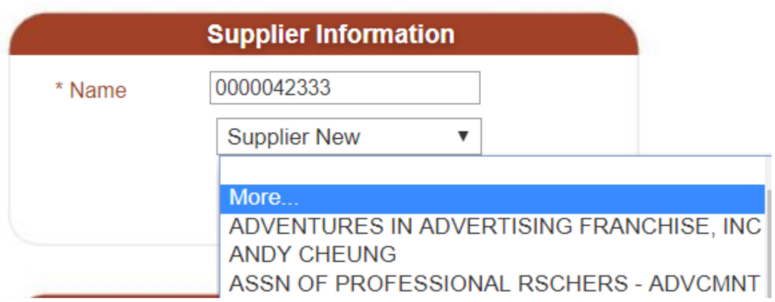
Update Supplier Information.

1. After receiving the email confirming supplier has completed registration process, the Initiator will return to the saved Requisition in FTS. Refer to Search for a Requisition to locate the request.

2. Update the **Supplier Information** to reflect the supplier recently added.

   Go to **More** in the dropdown to search and select the supplier.

3. Click **SAVE**.



4. Click **Submit for Approval** to send request to your Approving Official.

   The Status will change from Open to Pending Approval.

After the Requisition is approved by the Approving Official, the request will feed from FTS to CFS. In CFS, Procurement will process the requisition.

Approval Process

A requisition must be reviewed and approved by the department Approving Official in order for it to feed from FTS to CFS in a nightly batch process. CFS is used by Procurement to process requisitions.

In the approval process, the Approver will not be able to modify the requisition, except to upload additional backup documentation file(s).

If changes need to be made to the request, the Approver will have to cancel the requisition and the Requester will create a new one with the correct information.

If the department Approving Official approves the request, the action will be recorded as **Approved** with the Approver's name and date.

Note*: If the requisition is $50,000 or over, it will be routed to the Central Finance (CF) Officer for a second approval. The CF Official is an Approving Official within the Finance Service Group. The approval action by the CF Officer will be recorded on the requisition.*


Requisition

Header Information

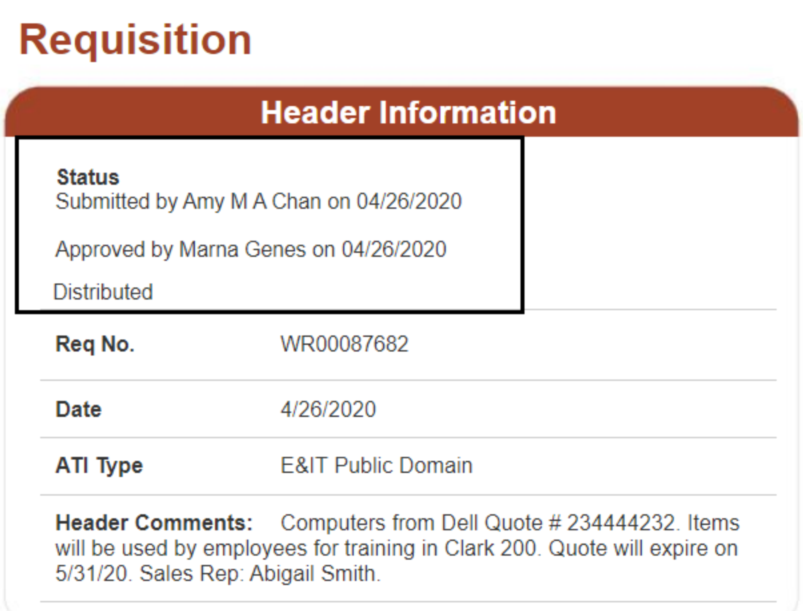
Status
Submitted by Amy M A Chan on 04/26/2020

Approved by Marna Genes on 04/26/2020

Req No.	WR00087682
Date	4/26/2020
ATI Type	E&IT Public Domain

Header Comments: Computers from Dell Quote # 234444232. Items will be used by employees for training in Clark 200. Quote will expire on 5/31/20. Sales Rep: Abigail Smith.

After the Approving Official and if applicable, the CF Approver, the request will feed to Common Finance System (CFS) in a nightly batch process. By next day, the requisition **Status** becomes **Distributed**.


Requisition

Header Information

Status
Submitted by Amy M A Chan on 04/26/2020

Approved by Marna Genes on 04/26/2020

Distributed

Req No.	WR00087682
Date	4/26/2020
ATI Type	E&IT Public Domain

Header Comments: Computers from Dell Quote # 234444232. Items will be used by employees for training in Clark 200. Quote will expire on 5/31/20. Sales Rep: Abigail Smith.

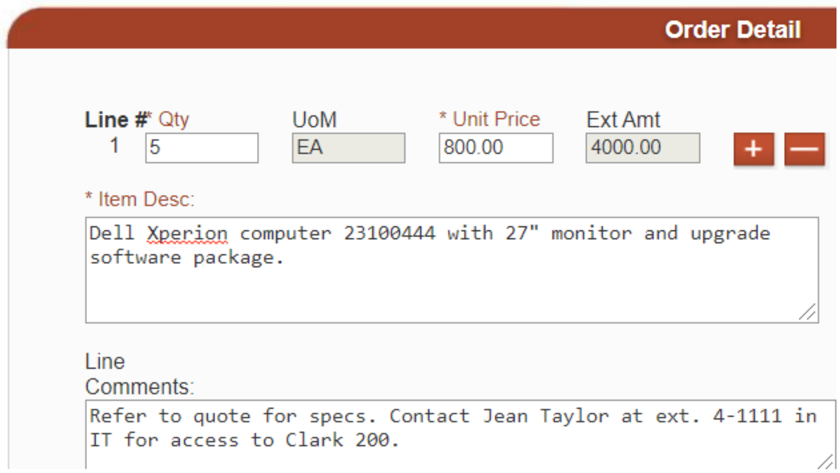
Split Distribution

A split distribution allows the user to charge an item or service to two or more Chartfield string.

The example in this section is for an order for 10 computers at $800 each. The expense will be charged to two different chartfield strings at 50% each. Each requisition line will represent one Chartfield string and the portion it is to be charged.

1. Create Line 1, by entering values in the **Order Detail** section. Enter the information for the first item and portion:

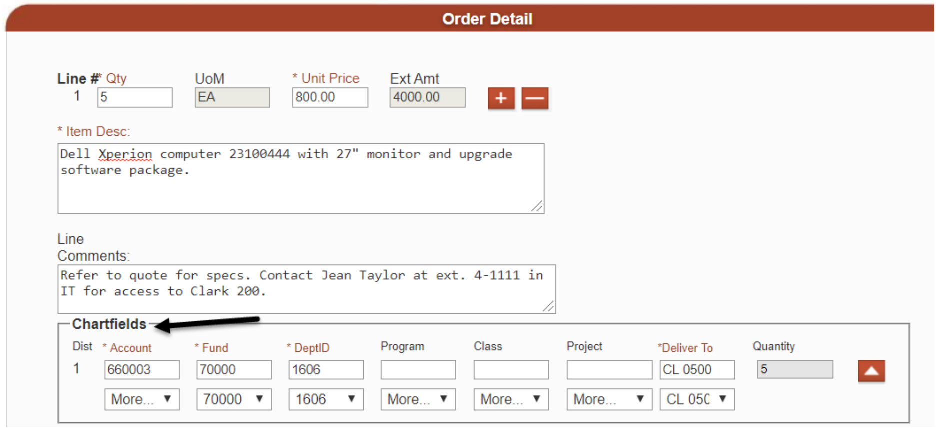
   - **Quantity:** Number you want to request for this line.
   - **Unit Price:** Price for each quantity.
   - **Item Desc:** Provide full description of item to order (e.g. brand name, model number, and supplier's item number, service period). 264 maximum character limit.
   - **Line Comments:** If needed use field to continue with line description or to provide additional info/instructions about the line.



2. Under **Chartfields**, enter the first chartfield string:

- **Acccount**
- **Fund**
- **DeptID**
- **Program** *(optional)*
- **Class** *(optional)*
- **Project** *(optional)*

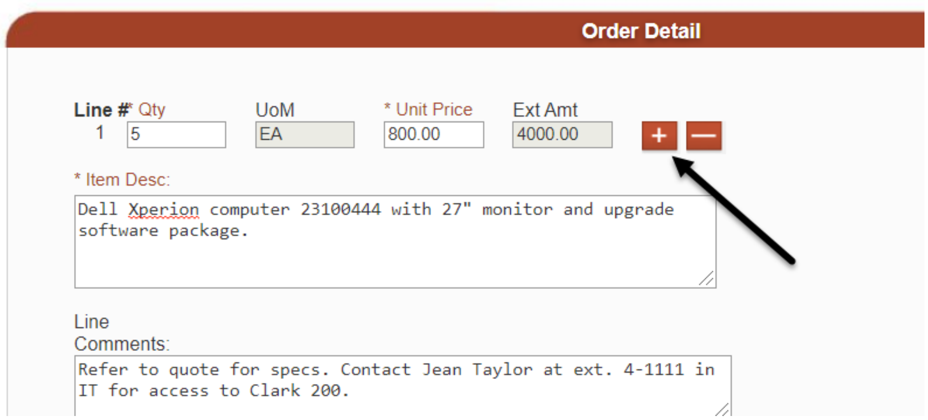
- **Deliver To:** Location where items are to be delivered to by Distribution Services.



3. Click **Save**.

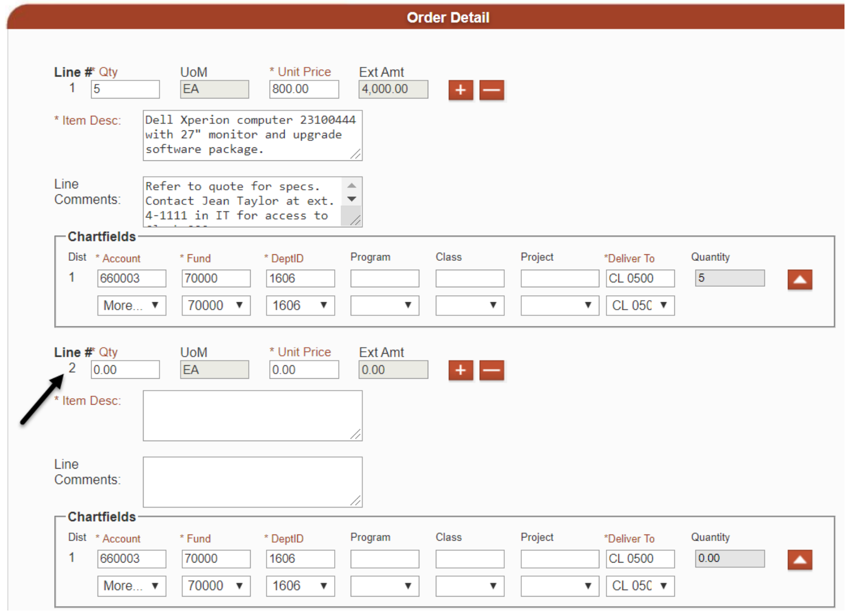
Line 1 is completed.

4. Click  to add Line 2.

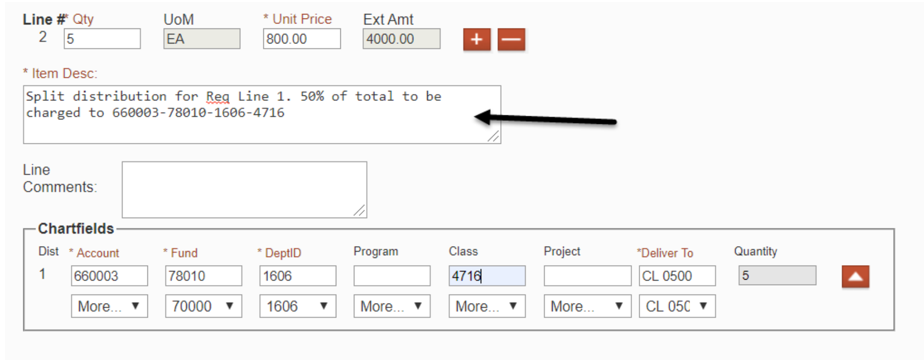


Line 2 added.

Chartfield section will auto-populate with values from same section in previous requisition line. Update fields as needed.



5. In **Order Detail** section for Line 2, enter the information for the second portion:



   - **Quantity:** Number you want to request for this line.
   - **Unit Price:** Price for each quantity.
   - **Item Desc:** Enter the same product/service description as entered in Line 1.
   - **Line Comments:** Enter "**Split distribution for Req Line 1 (%)**"

     Note*: The total percentage for Line 1 and 2 must be 100%.*

6. Under **Chartfields**, enter the second chartfield string:

   - **Acccount**
   - **Fund**
   - **DeptID**
   - **Program** *(optional)*
   - **Class** *(optional)*
   - **Project** *(optional)*

   - **Deliver To:** Location where items are to be delivered to by Distribution Services.

7. Click **Save**.

Split distribution is complete.

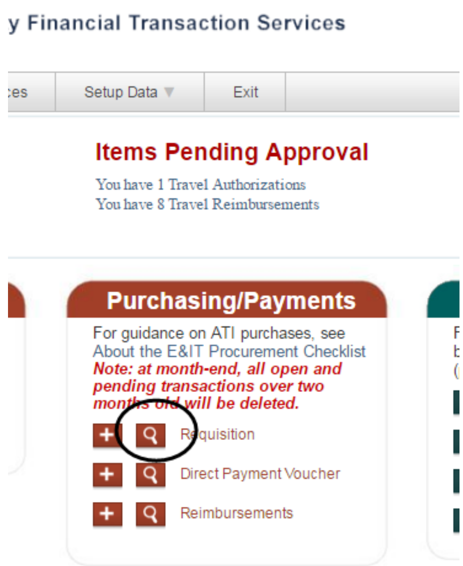
Repeat above steps 1 to 7 if more than one line is to be split.

General Features

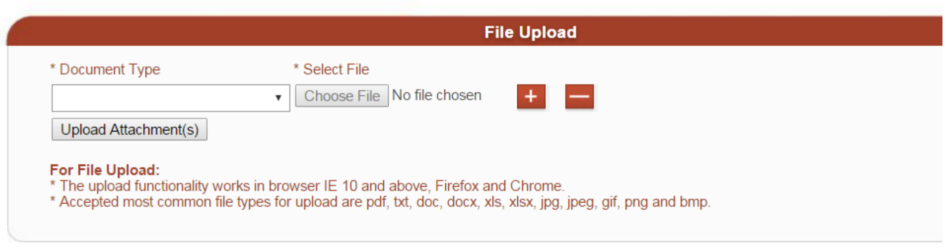
Upload Support Backup Documentation

Additional backup documentation related to the requisition can be uploaded anytime, even after it is in Distributed status. There is no need to forward hardcopies of the requisition and backup to Procurement.

1. Refer to Search Feature for instructions to locate a requisition.

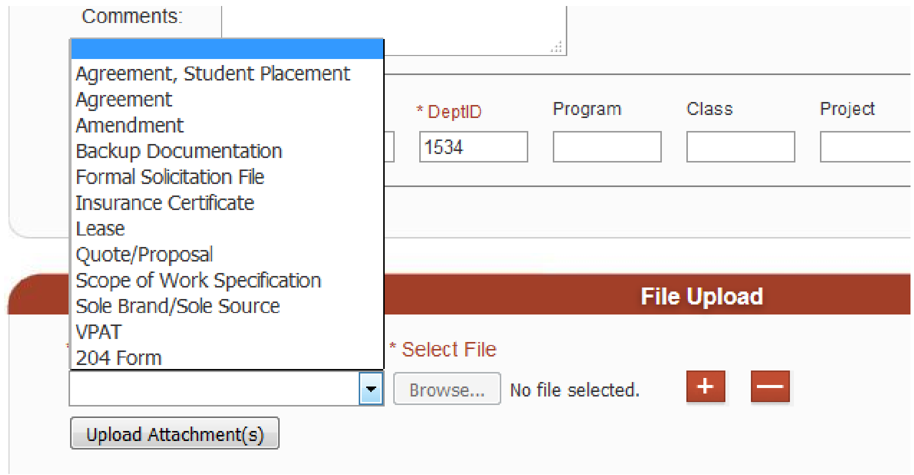


2. When the requisition has been located and on the page, scroll down to **File Upload**.



To upload support backup documentation files-

3. **Document Type**: Select description for the file from the dropdown menu.

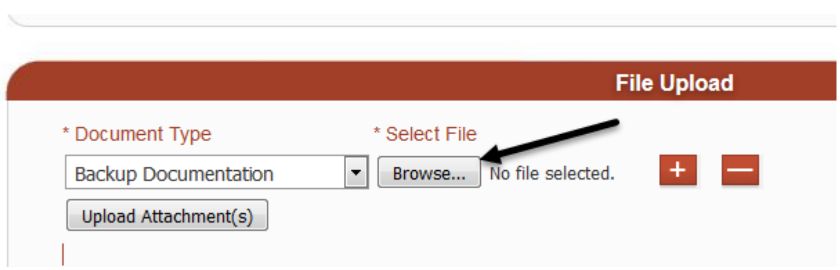


Note: *A file can include multiple pages, but we recommend users create a separate file for each document type. This will help users easily identify and retrieve files to view.*

Important: *If uploading an invoice, it will serve as a backup documentation for the requisition.* ***It will not be forwarded to Accounts Payable by Procurement for payment****.*

For payment, users are to send the invoice to Accounts Payable online using [e-Invoice] ***after*** *the purchase order is issued.*

4. Click **Browse** button to select file.

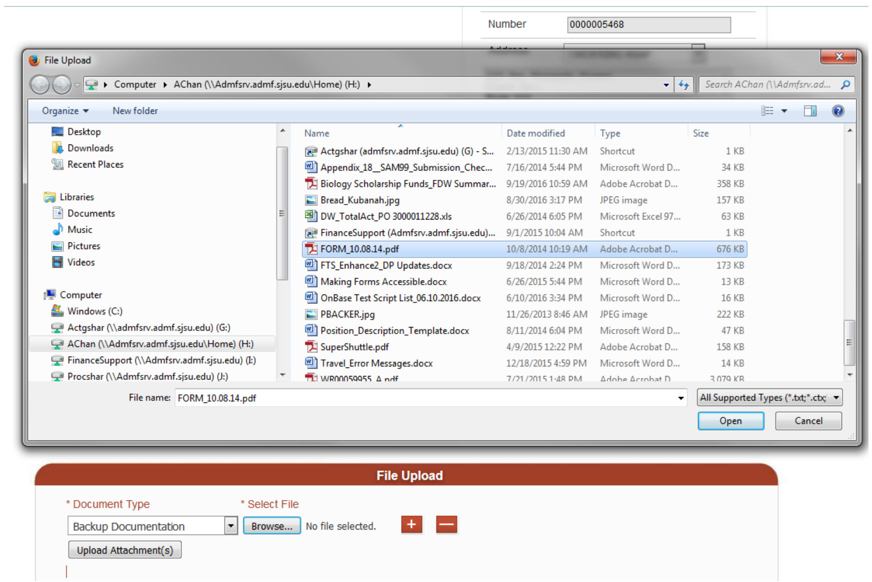


File Upload panel appears.

5. Select file to upload.

   ***Note**: File names cannot contain special characters such as #, $, and %.*

6. Click **Open**.

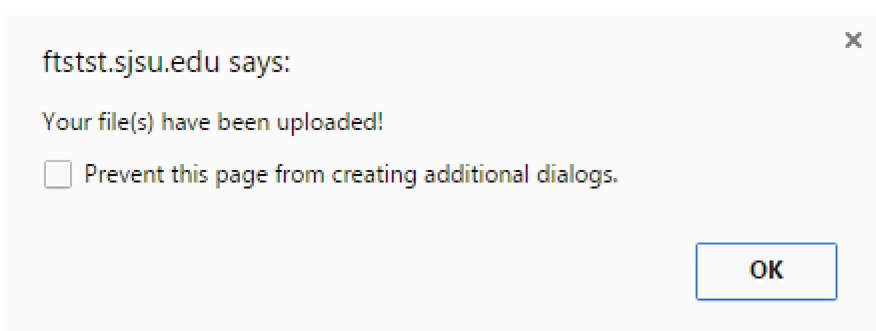


The file name displays.

7. Click **Upload Attachment(s)** to complete the upload process.

Message appears to confirm file has been uploaded.

8. Click **OK** to continue.

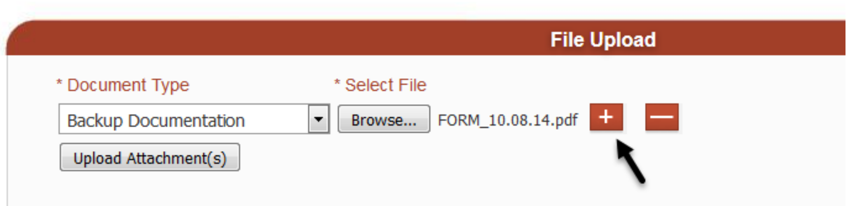


9. To upload more files, click and repeat steps 1 to 8.

   or

   to delete file upload line.

   ***Note**: If uploading file(s) for a Distributed status requisition, links to the new uploads will not appear in the requisition until the next day.*

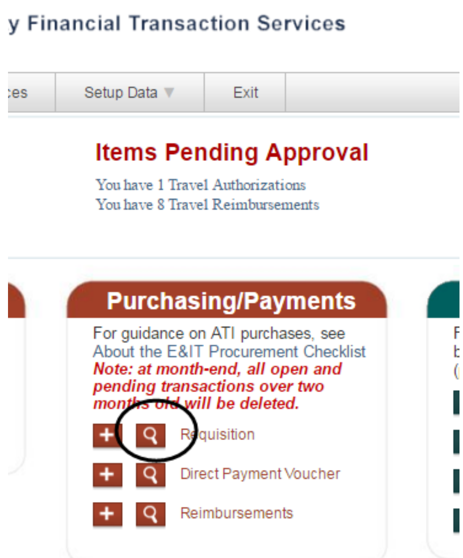


Search for a Requisition

Locate a requisition by using the search feature. Only requisitions within your DeptID access will display.

From the Main Menu:

1. Click the button.



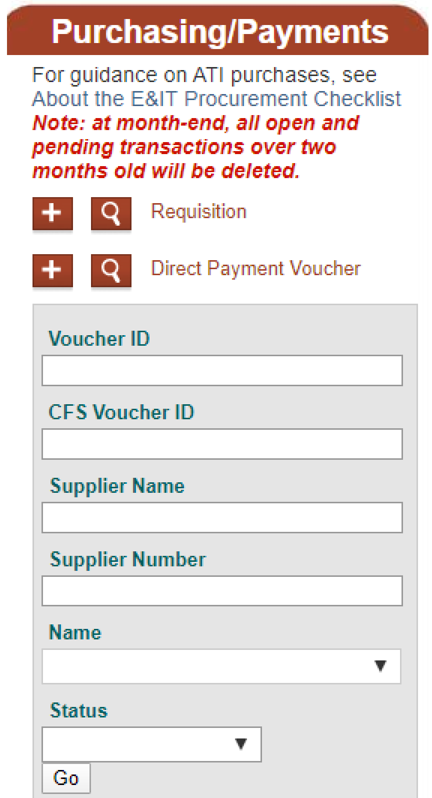
Section expands.

The requests displayed are associated to your DeptID access.

2. Key in or select from dropdown menu one or more values in fields:

    - **ReqID:** Requisition Number
    - **Name:** Name of person who created the request.
    - **Supplier ID**
    - **Supplier Name**
    - **PO Number**
    - **Status**

3. Click **Go**.

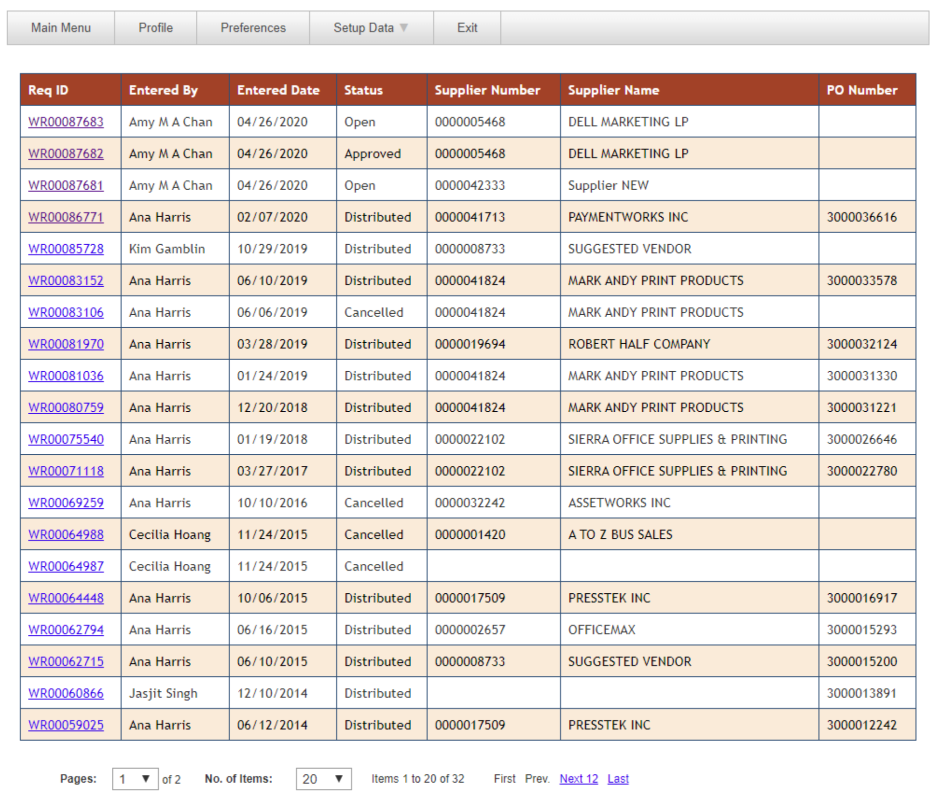


Results display.

By default, 20 lines of results display at one time.

Results display:

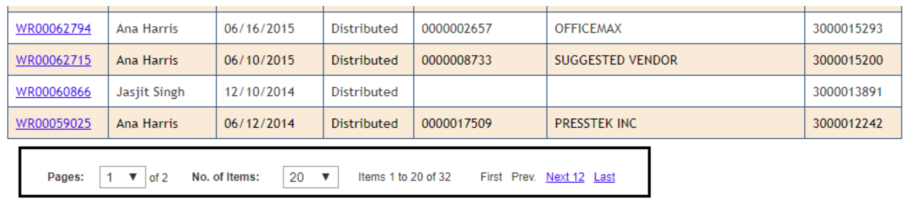
- **Requisition ID**
- **Requester**
- **Entered Date**
- **Status**
- **Supplier Number**
- **Supplier Name**
- **PO Number** (if issued)



Req ID	Entered By	Entered Date	Status	Supplier Number	Supplier Name	PO Number
WR00087683	Amy M A Chan	04/26/2020	Open	0000005468	DELL MARKETING LP	
WR00087682	Amy M A Chan	04/26/2020	Approved	0000005468	DELL MARKETING LP	
WR00087681	Amy M A Chan	04/26/2020	Open	0000042333	Supplier NEW	
WR00086771	Ana Harris	02/07/2020	Distributed	0000041713	PAYMENTWORKS INC	3000036616
WR00085728	Kim Gamblin	10/29/2019	Distributed	0000008733	SUGGESTED VENDOR	
WR00083152	Ana Harris	06/10/2019	Distributed	0000041824	MARK ANDY PRINT PRODUCTS	3000033578
WR00083106	Ana Harris	06/06/2019	Cancelled	0000041824	MARK ANDY PRINT PRODUCTS	
WR00081970	Ana Harris	03/28/2019	Distributed	0000019694	ROBERT HALF COMPANY	3000032124
WR00081036	Ana Harris	01/24/2019	Distributed	0000041824	MARK ANDY PRINT PRODUCTS	3000031330
WR00080759	Ana Harris	12/20/2018	Distributed	0000041824	MARK ANDY PRINT PRODUCTS	3000031221
WR00075540	Ana Harris	01/19/2018	Distributed	0000022102	SIERRA OFFICE SUPPLIES & PRINTING	3000026646
WR00071118	Ana Harris	03/27/2017	Distributed	0000022102	SIERRA OFFICE SUPPLIES & PRINTING	3000022780
WR00069259	Ana Harris	10/10/2016	Cancelled	0000032242	ASSETWORKS INC	
WR00064988	Cecilia Hoang	11/24/2015	Cancelled	0000001420	A TO Z BUS SALES	
WR00064987	Cecilia Hoang	11/24/2015	Cancelled			
WR00064448	Ana Harris	10/06/2015	Distributed	0000017509	PRESSTEK INC	3000016917
WR00062794	Ana Harris	06/16/2015	Distributed	0000002657	OFFICEMAX	3000015293
WR00062715	Ana Harris	06/10/2015	Distributed	0000008733	SUGGESTED VENDOR	3000015200
WR00060866	Jasjit Singh	12/10/2014	Distributed			3000013891
WR00059025	Ana Harris	06/12/2014	Distributed	0000017509	PRESSTEK INC	3000012242

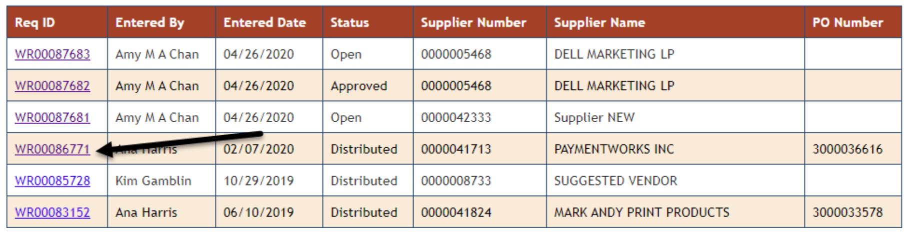
Pages: 1 of 2 No. of Items: 20 Items 1 to 20 of 32 First Prev. Next 12 Last

4. To display more lines or navigate between pages or results, utilize the features located at bottom of page to do so.



WR00062794	Ana Harris	06/16/2015	Distributed	0000002657	OFFICEMAX	3000015293
WR00062715	Ana Harris	06/10/2015	Distributed	0000008733	SUGGESTED VENDOR	3000015200
WR00060866	Jasjit Singh	12/10/2014	Distributed			3000013891
WR00059025	Ana Harris	06/12/2014	Distributed	0000017509	PRESSTEK INC	3000012242

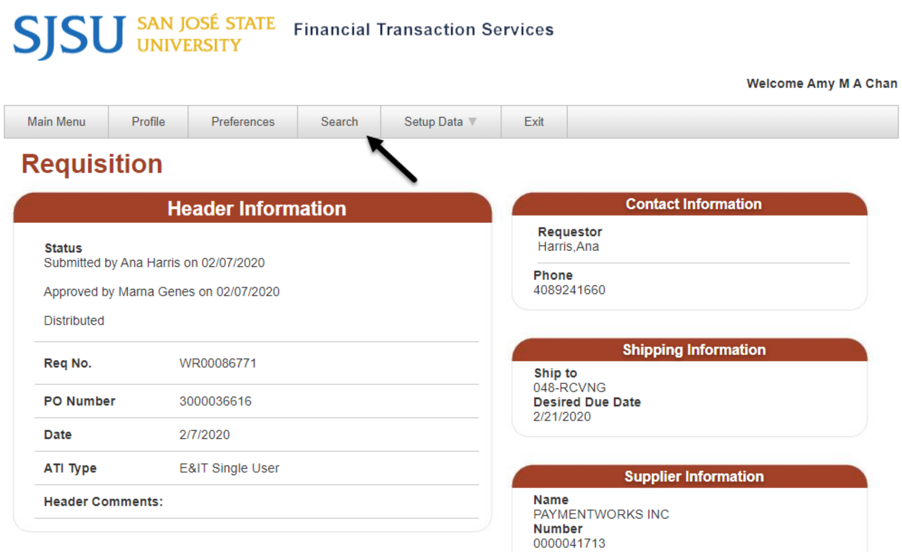
5. Click on a **Req ID** hyperlink to view the request.



Req ID	Entered By	Entered Date	Status	Supplier Number	Supplier Name	PO Number
WR00087683	Amy M A Chan	04/26/2020	Open	0000005468	DELL MARKETING LP	
WR00087682	Amy M A Chan	04/26/2020	Approved	0000005468	DELL MARKETING LP	
WR00087681	Amy M A Chan	04/26/2020	Open	0000042333	Supplier NEW	
WR00086771	Ana Harris	02/07/2020	Distributed	0000041713	PAYMENTWORKS INC	3000036616
WR00085728	Kim Gamblin	10/29/2019	Distributed	0000008733	SUGGESTED VENDOR	
WR00083152	Ana Harris	06/10/2019	Distributed	0000041824	MARK ANDY PRINT PRODUCTS	3000033578

The Requisition page displays.

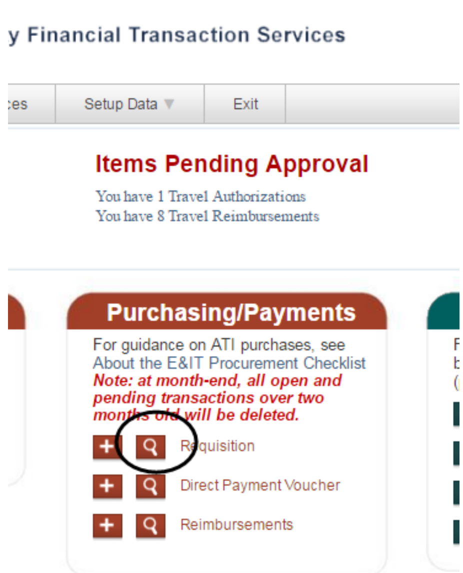
6. Click **Search** tab to return to the list of results.



View Uploaded Support Backup Documentation

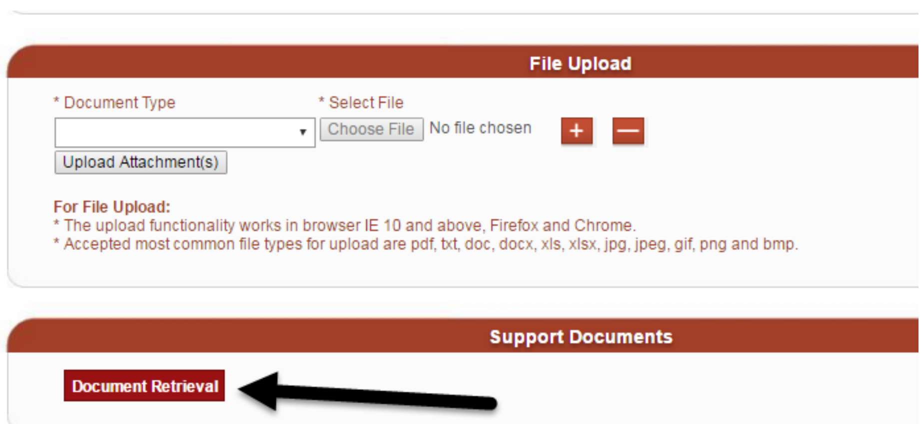
Users can view backup documentation for requisitions submitted.

1. Refer to [Search Feature] for instructions to locate a requisition.



2. When the requisition has been located and on the page, scroll down to **Support Documents**.

3. Click on **Document Retrieval**.

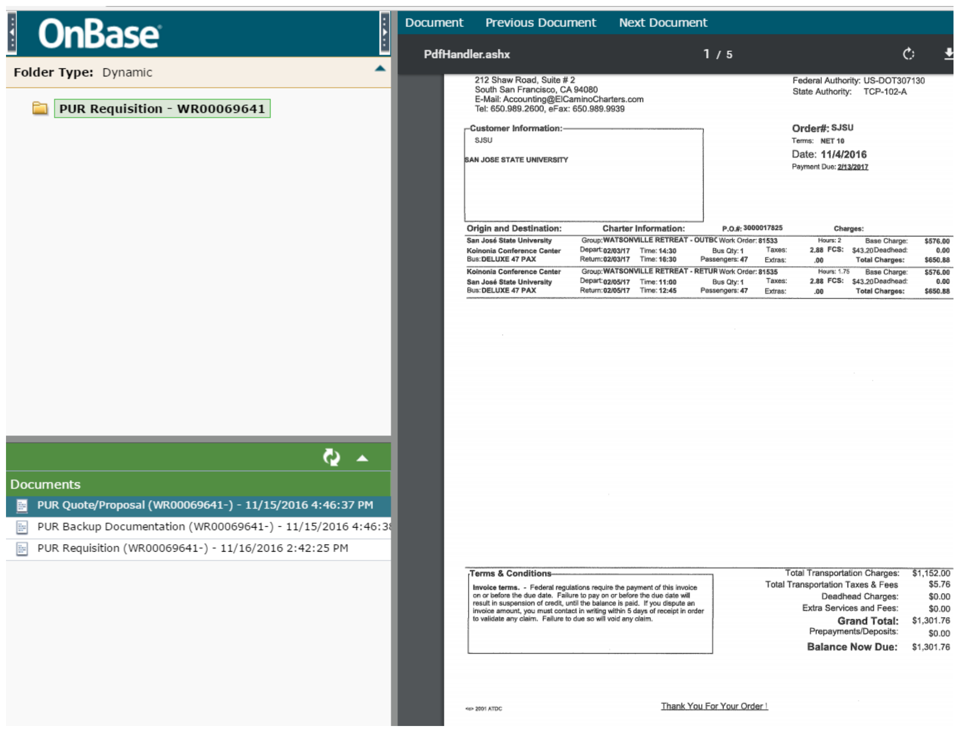


OnBase window displays.

OnBase is the imaging system used to store backup documentation associated to the request.

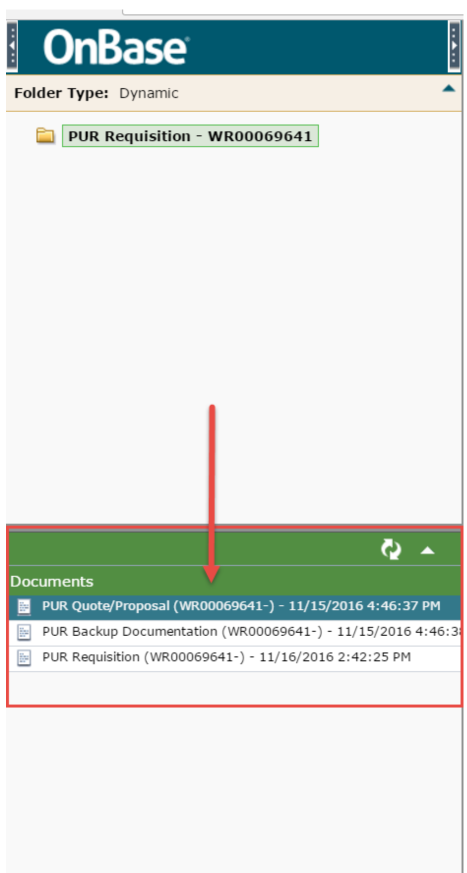
There are three sections on the page:

- **Folder Type:** Requisition folder (package).
- **Documents:** List of backup documents files associated to the requisition.
- **Image:** Displays file content.

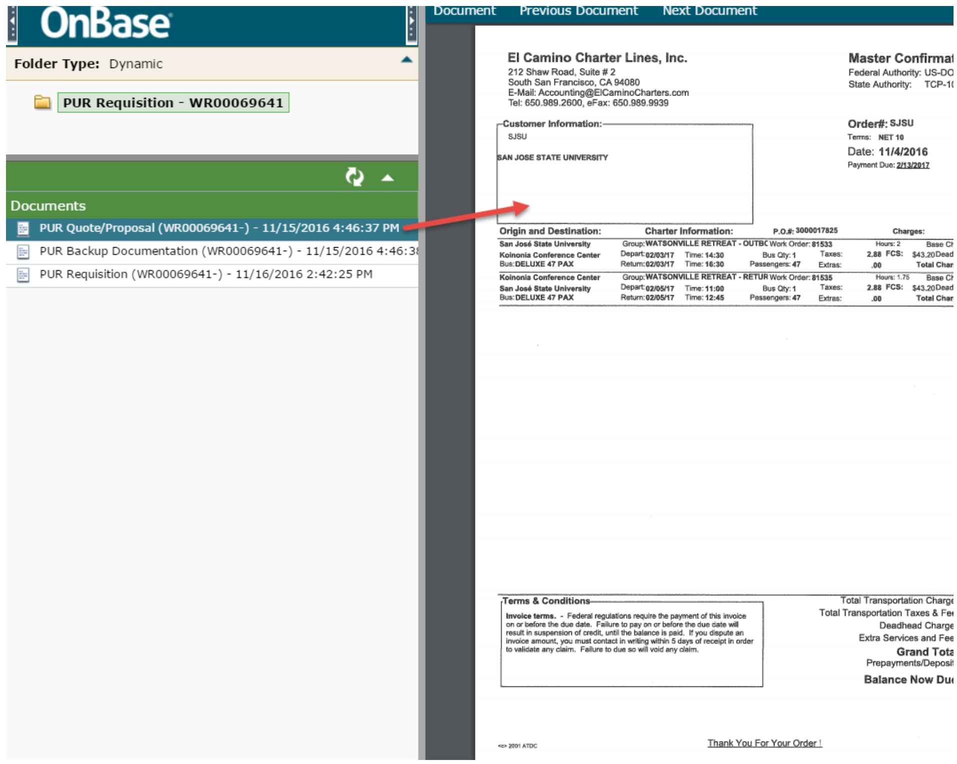


The bottom panel presents a list of backup documentation files associated to the requisition. They identify the Document Type, Requisition Number, and date/time it was uploaded.

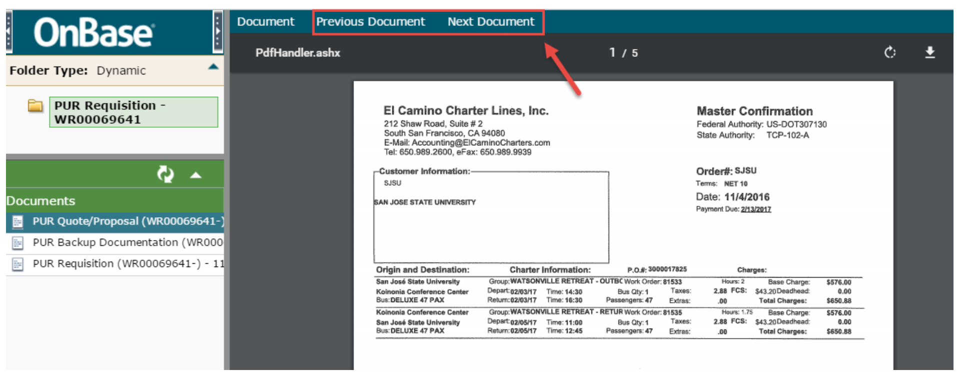
4. In **Documents**, click on a file to view content.



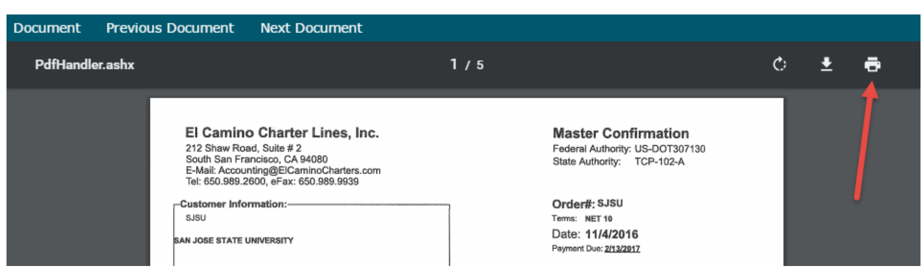
5. The right side of panel displays content of the selected document file.



6. A file can contain multiple pages. Click **Previous Document** or **Next Document** to change page in file.



7. Click **Printer** icon to print page(s) in a file.



References

Accessible Technology Initiative (ATI): For information related to purchasing Electronic and Information Technology (E&IT) products. (https://www.sjsu.edu/finance/policies_guidelines/ati/index.html)

Courses: List of available Finance related training. (https://www.sjsu.edu/finance/financeconnect/training/training/)

e-Invoice: Web portal used to submit PO invoices to Accounts Payable (http://einvoice.sjsu.edu/)

Invoice Criteria: Accounts Payable's requirements for paying an invoice. (http://www.sjsu.edu/finance/policies_guidelines/invoice_criteria/index.html)

One.SJSU: SJSU website to log into the all applications used on campus. (one.sjsu.edu)

Procurement Pathways: A collection of processes for campus departments to follow when procuring goods and services. (http://www.sjsu.edu/finance/financeconnect/resources/pathways/index.html)

Requisition: (http://www.sjsu.edu/finance/financeconnect/resources/pathways/requisition/index.html)

Finance Systems Access Request Form: A DocuSign form used to request Finance systems access: FTS, CFS, and Data Warehouse. (https://na2.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=86a452d7-b2bb-47a5-9821-1558df13a3e4)

Contact

If you have any questions, please contact Finance Support at financeconnect@sjsu.edu or 4-1558.