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Overview

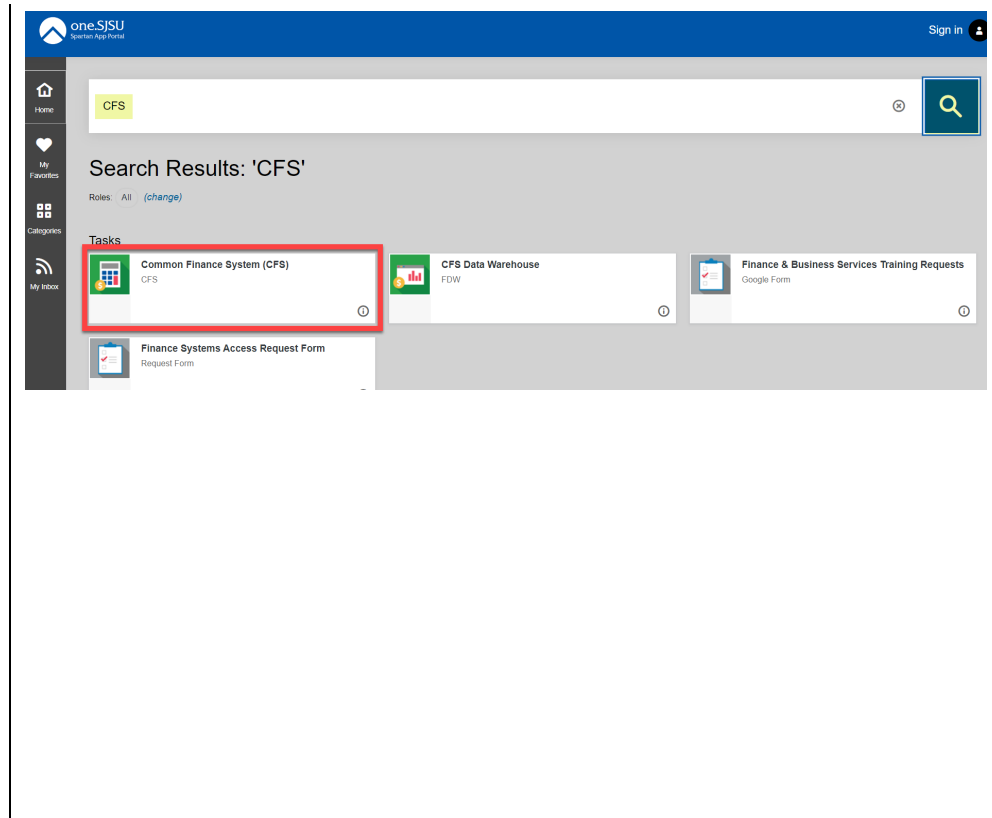
This business process guide demonstrates ways to search and review activity [Requisition, PO, voucher, and payment) for a purchase order in Common Finance Services [CFS].

Please contact FinanceConnect with any questions at financeconnect@sjsu.edu or 4-1558.

Log into CFS

The following instructions show how to log into CFS.

1. Go to one.SJSU.edu.
2. Search for CFS and click on it.



CSU Duo login page displays.

3. Enter your **SJSU ID Number** and **Password**.

4. Click **Sign In**.

Connecting to **CSU** **Duo**
Sign in with your account to access CSU Common Financial System

SJSU SAN JOSÉ STATE UNIVERSITY

Sign In

SJSU ID Number
#####

Password
SJSUOne Password

Keep me signed in

Sign in

5. Click **Verify**.

SJSU SAN JOSÉ STATE UNIVERSITY

Verify with Duo Universal Prompt

You will be redirected to verify with Duo Universal Prompt

Verify

[Back to sign in](#)

Duo

Check for a Duo Push

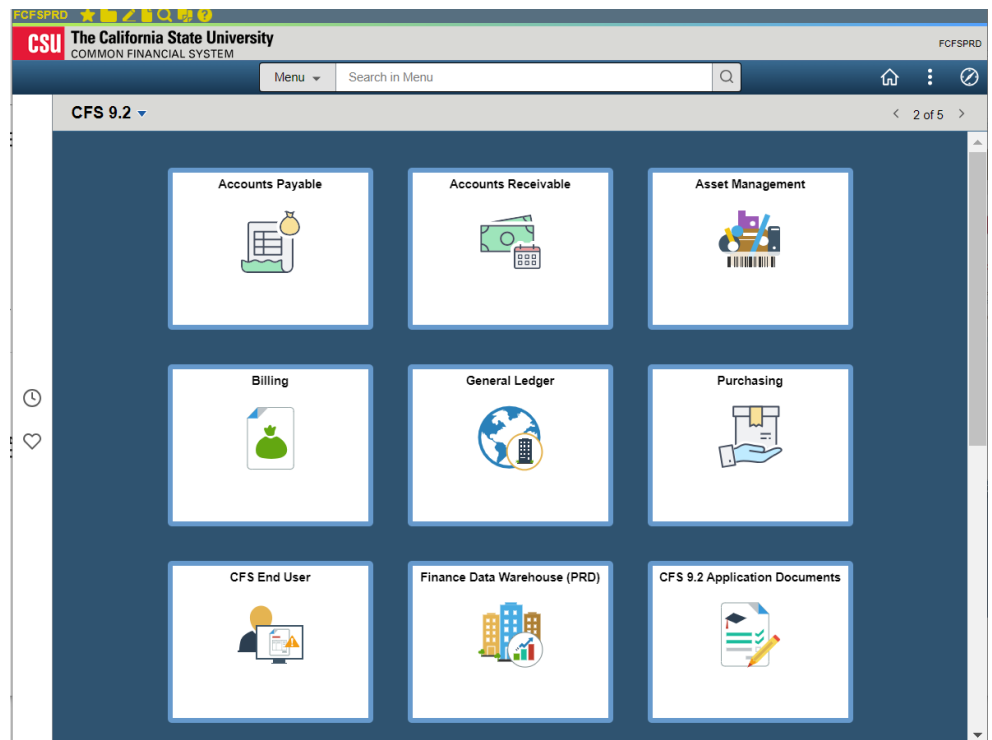
Verify it's you by approving the notification...

Sent to "iOS" (.....)

Other options

[Need help?](#) Secured by Duo

CFS 9.2 Homepage displays



View PO Activity

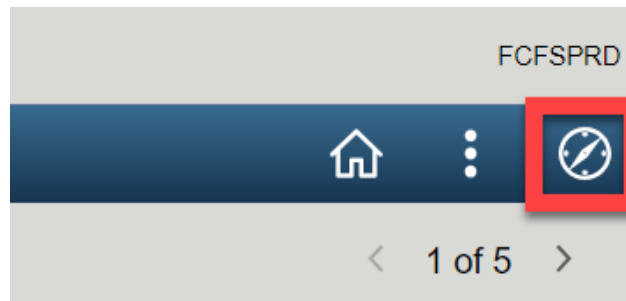
CFS is just one of the finance applications to use for following purchase order activity. To view backup documentation associated to the PO, use FTS system. This section demonstrates how to check the purchase order [PO] activity by the Requisition or PO number.

Section 1: By Purchase Order Number

The following instructions demonstrate how to view activity with a PO number in the Purchasing module.

1. From the CFS 9.2 [Oracle]

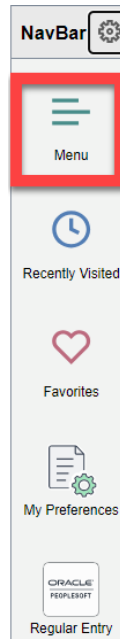
homepage, click the **NavBar** icon.



NavBar menu displays.

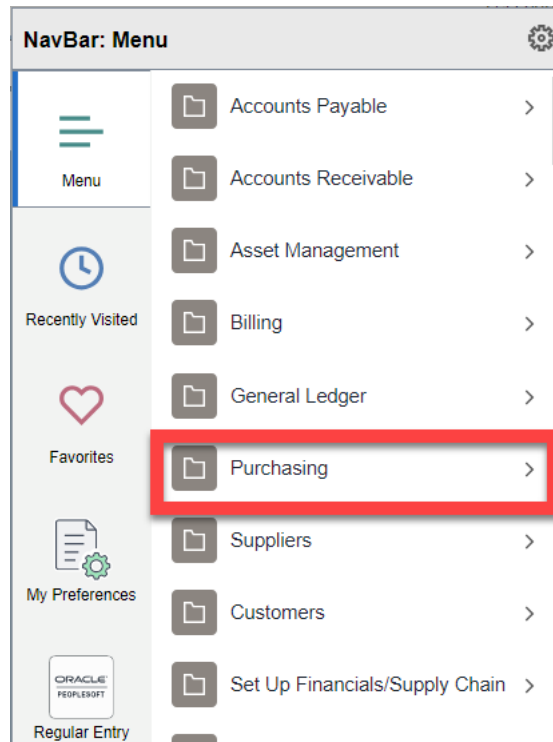
The instructions will go through using the **Menu** tile to navigate to a module.

2. Click on the **Menu** tile.

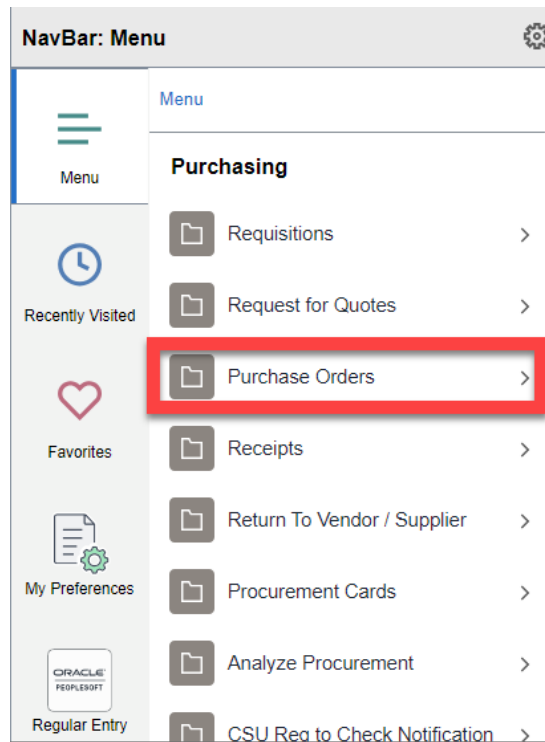


The Menu displays the modules a user has access to.

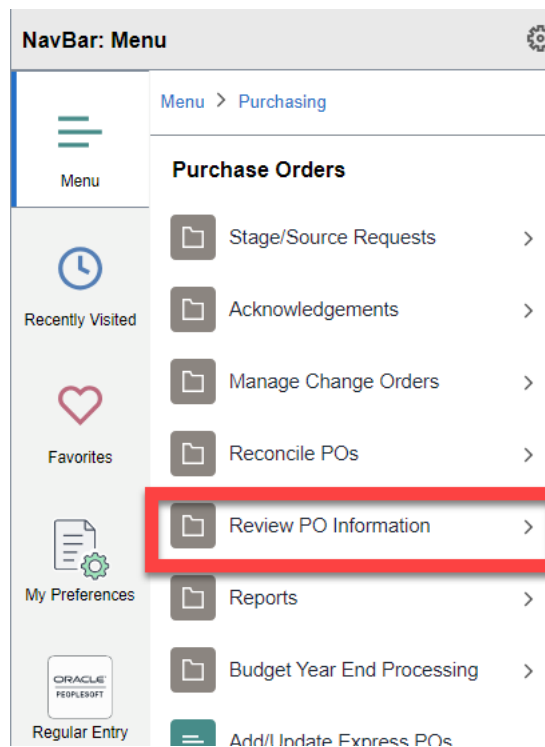
3. Select **Purchasing** module.



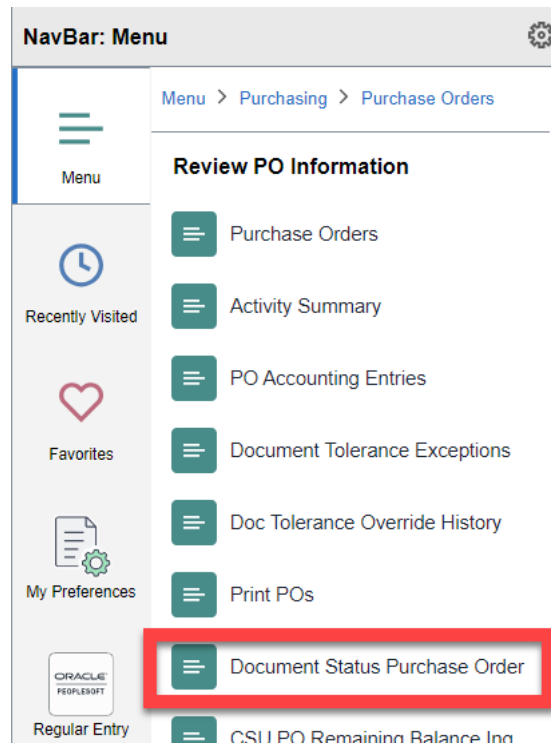
4. In the Purchasing module, select **Purchase Orders**.



5. In Purchase Orders, select **Review PO Information**.



- In Review PO Information, select **Document Status**.



Purchase Order Document Status page displays.

- In the **Business Unit** field, enter SJ000.
- Enter the 10-digit Purchase Order Number in the **PO Number** field.
- Click **Search**.

Purchase Order Document Status

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

*Business Unit =

PO Number begins with

Purchase Order Date =

Origin begins with

Purchase Order Reference begins with

Case Sensitive

[Basic Search](#)

Document Status Purchase Order page displays.

The top part of page provides Purchase Order summary:

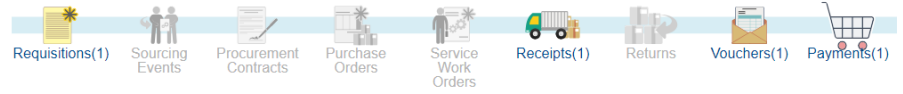
- **Document Date:** Purchase order date
- **Buyer:** Name of Buyer in Contracts and Procurement Services
- **PO ID:** Purchase Order number.
Note: Click the PO number hyperlink to view the purchase order details, if needed.
- **Status:** Purchase order status
- **Merchandise Amount:** PO Amount

Under the Associated Document section, the Documents list will display the activity for PO.

*Note: By default, only the first four transactions appear. Click **View All**, if needed, to display all lines in list.*

Document Status Purchase Order

Business Unit	SJ000	PO ID	3000051122
Document Date	04/10/2024	Status	Dispatched
Currency	USD	Document Type	Purchase Order
Buyer	Nguyen,Johnson	Merchandise Amt	672.08
		Budget Status	Valid



Show All

Document Status Purchase Order

Business Unit	SJ000	PO ID	3000051122
Document Date	04/10/2024	Status	Dispatched
Currency	USD	Document Type	Purchase Order
Buyer	Nguyen,Johnson	Merchandise Amt	672.08
		Budget Status	Valid



Show All

Associated Document

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions	SJ000		Payment	789029	Posted	06/13/2024	0000004387	MAIN	
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	0000004387	MAIN	
▼ Actions		SJ000	Requisition	WR00106595	Approved	04/03/2024			
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	0000004387	MAIN	

Return to Search

The Documents section provides the following information:

- **Document Type** column identifies the transaction type-
 - **Requisition:** Refers to the request submitted by the department in FTS.
 - **Receipt:** Tangible goods such as books, equipment, and furniture require a receipt confirmation to be entered by the department in CFS. This confirmation is needed by to pay a supplier's invoice.
 - **Voucher:** Payment Services creates a voucher when invoice is received from supplier.
 - **Payment:** When invoice meets Payment Services payment criteria, a check is issued to the supplier to pay the voucher.

- **DOC ID** column gives you the Requisition Number, Receipt number, CFS Voucher ID and Payment check number.

- **Document Date** refers to the date of transaction.

Document Status Purchase Order

Business Unit SJ000 PO ID 3000051122
 Document Date 04/10/2024 Status Dispatched
 Currency USD Document Type Purchase Order
 Buyer Nguyen,Johnson Merchandise Amt 672.08
 Budget Status Valid

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts(1) Returns Vouchers(1) Payments(1)

Show All

Associated Document

Documents	Related Info								
Actions*	SelID	Business Unit	Document Type*	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions	SJ000		Payment	789029	Posted	06/13/2024	0000004387	MAIN	
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	0000004387	MAIN	
▼ Actions		SJ000	Requisition	WR00106595	Approved	04/03/2024			
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	0000004387	MAIN	

Return to Search

Each number in the DOC ID column is a hyperlink that will provide additional information about the Document Type.

To view **Receipt** details, refer to the [Receipts tutorial](#).

10. Click the Requisition Number [WR00xxxxxx] hyperlink in DOC ID column, for the **Requisition** page.

The **Requisition** page gives a summary of the request. Click the Requisition number hyperlink to view the details to the request.

11. Click the Voucher Number hyperlink in DOC ID column, for the **Voucher Inquiry** page.

On the Voucher Inquiry page, the **Voucher Details** panel provides the supplier's invoice information.

On the same Voucher Inquiry page, click the **Amounts** tab to view supplier's invoice amount.



Show All

Associated Document

Documents | Related Info | Filter

Actions^	SetID	Business Unit	Document Type^	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	SJ000		Payment	789029	Posted	06/13/2024	0000004387	MAIN
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	0000004387	MAIN
▼ Actions		SJ000	Requisition	WR00106595	Approved	04/03/2024		
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	0000004387	MAIN

Return to Search

Requisitions

Req Inquiry

Details | Status | Filter

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
SJ000	WR00106595	WR00106595	Approved	Thai, Jacqueline	04/03/2024	792.12 USD

Search

Notify

Voucher Inquiry

Search Criteria

Sort Criteria

Display Currency Criteria

Voucher Inquiry Results

Voucher Details | Amounts | More Details | Supplier Details | Filter

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	SJ000	00486440	12410588	04/18/2024	0000004387	Postable	<input type="checkbox"/>	Matched	4IMP INC-001

Voucher Inquiry

Search Criteria

Sort Criteria

Display Currency Criteria

Voucher Inquiry Results

Voucher Details | Amounts | More Details | Supplier Details | Filter

Actions	Business Unit	Voucher ID	Transaction Currency	Gross Invoice Amount	Voucher Unpaid Balance	Unapplied Prepayments	Total Non-Merch	Entered VAT	Gross Amount Paid	Net Amount Paid
▼ Actions	SJ000	00486440	USD	741.72	0.00	0.00	142.73	0.00	741.72	741.72

12. Click the payment number hyperlink in DOC ID column for the **Payment Inquiry** page.

On the Payment Inquiry page, the **Payment Details** panel shows the check number [Payment Reference ID], amount, date of check, and if it has reconciled [cashed].

Note: The Reconcile Date refers to the date SJSU uploaded the bank file and not the day check was cashed. In this snapshot, the reconcile date is 07/01/2024, so the check reconciled in the month of July.

Payment Inquiry

Search Criteria

Sorting Criteria

Payment Inquiry Result

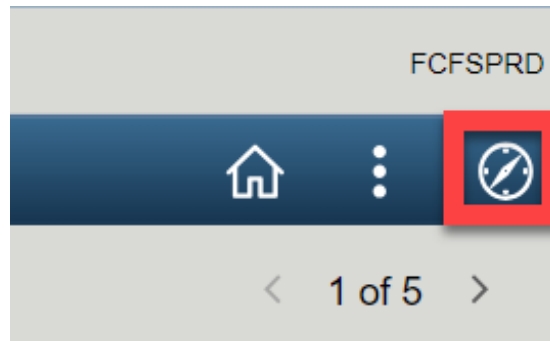
Actions	Source	Payment Reference ID	Payment Method	Amount	Currency	Creation Date	Payment Date	Payment Status	Reconciliation Status	Reconcile Date
▼ Actions	VCHR	789029	System Check	741.72	USD	06/13/2024	06/13/2024	Paid	Reconciled	07/01/2024

Section 2: By Requisition Number

Follow the steps below to view activity by Requisition Number in the Purchasing module.

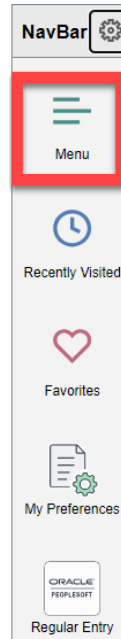
1. From the CFS 9.2 [Oracle]

homepage, click the **NavBar** icon.

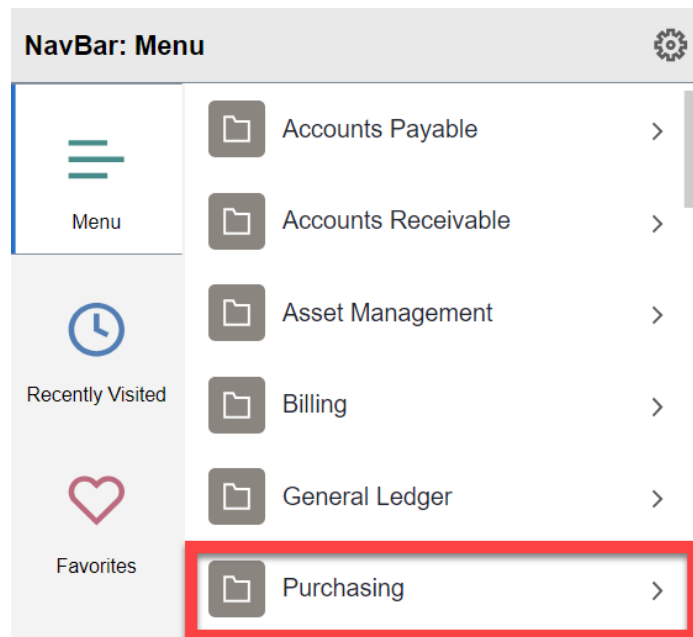


NavBar menu displays.

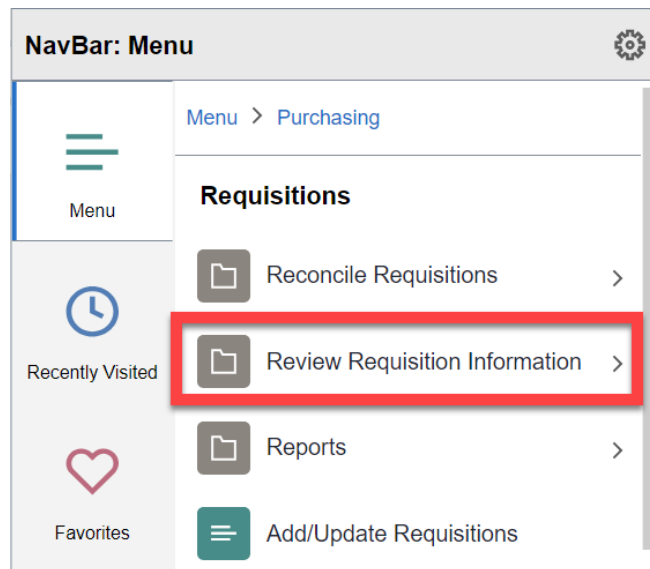
- 2. Click on the **Menu** tile.



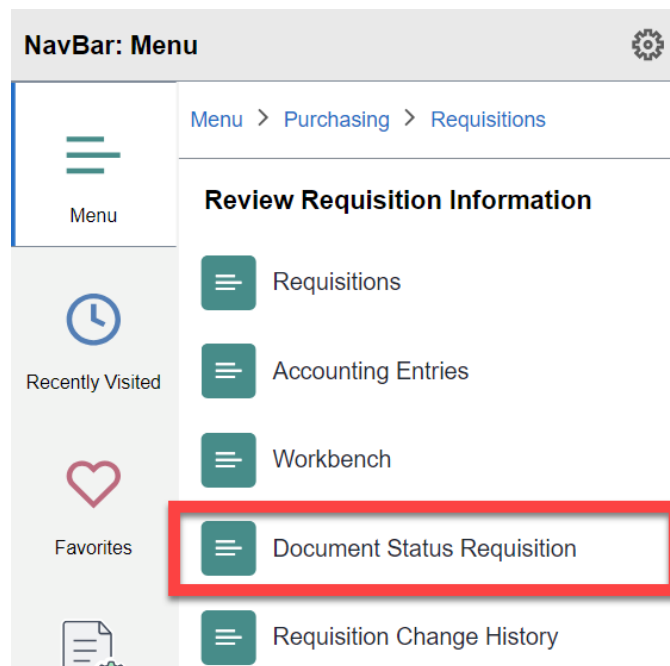
- 3. Click Purchasing module, select **Requisitions**.



4. In Requisitions, select **Review Requisition Information**.



5. In Review Requisition Info, select **Document Status**.



Requisition Document Status page displays.

6. In the **Business Unit** field, enter SJ000.
7. Enter the 10-digit Requisition Number in the **Requisition ID** field.
8. Click **Search**.

Requisition Document Status

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

*Business Unit =

Requisition ID begins with

Requisition Status =

Requisition Date =

Origin begins with

Requester begins with

Description begins with

Case Sensitive

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

Document Status displays.

The top part of page provides Requisition information:

- **Document Date:** Requisition date
 - **Req ID:** Requisition Number
- Note: Click the PO number hyperlink to view the purchase order details, if needed.*
- **Status:** Requisition status
 - **Merchandise Amount:** Requisition amount

Document Status Requisition

Business Unit	SJ000	Req ID	WR00106595
Document Date	04/03/2024	Status	Approved
Currency	USD	Document Type	Requisition
Requester	Tha, Jacqueline	Merchandise Amt	792.12
		Budget Status	Valid

Requisitions Inventory Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts(1) Returns Vouchers(1) Payments(1)

[Show All](#)

Associated Document

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		SJ000	Purchase Order	3000051122	Dispatched	04/10/2024	0000004387	MAIN	🔗
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	0000004387	MAIN	🔗
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	0000004387	MAIN	🔗
▼ Actions	SJ000		Payment	789029	Posted	06/13/2024	0000004387	MAIN	🔗

[Return to Search](#)

Under the Associated Document section, the Documents list shows the entire activity for PO.

*Note: By default, only the first four transactions appear. Click **View All**, if needed, to display all lines in list.*

Document Status Requisition

Business Unit	SJ000	Req ID	WR00106595
Document Date	04/03/2024	Status	Approved
Currency	USD	Document Type	Requisition
Requester	Thai, Jacqueline	Merchandise Amt	792.12
		Budget Status	Valid

[Requisitions](#)
[Inventory](#)
[Sourcing Events](#)
[Procurement Contracts](#)
[Purchase Orders\(1\)](#)
[Service Work Orders](#)
[Receipts\(1\)](#)
[Returns](#)
[Vouchers\(1\)](#)
[Payments\(1\)](#)

[Show All](#)

Associated Document

[View All](#)

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		SJ000	Purchase Order	3000051122	Dispatched	04/10/2024	0000004387	MAIN	🔍
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	0000004387	MAIN	🔍
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	0000004387	MAIN	🔍
▼ Actions	SJ000		Payment	788029	Posted	06/13/2024	0000004387	MAIN	🔍

[Return to Search](#)

The **Documents** section provides the following information:

- **Document Type** column identifies the transaction type-
 - **Purchase Order:** A PO is issued by Contracts and Procurement Services.
 - **Receipt:** Tangible goods such as books, equipment, and furniture require a receipt confirmation to be entered by the department in CFS. This confirmation is needed by Payment Services to pay a supplier's invoice.
 - **Voucher:** Payment Services creates a voucher when invoice is received from supplier.
 - **Payment:** When invoice meets Payment Services' payment criteria, a check is issued to the supplier to pay the voucher.
- **DOC ID** column gives you the PO Number, CFS Voucher ID or Payment check number.
- **Document Date** refers to the date of transaction.

Document Status Requisition

Business Unit SJ000 Req ID WR00106595
 Document Date 04/03/2024 Status Approved
 Currency USD Document Type Requisition
 Requester Thai Jacqueline Merchandise Amt 792.12
 Budget Status Valid



Show All

Associated Document

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		SJ000	Purchase Order	3000051122	Dispatched	04/10/2024	000004387	MAIN	
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	000004387	MAIN	
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	000004387	MAIN	
▼ Actions	SJ000		Payment	789029	Posted	06/13/2024	000004387	MAIN	

Return to Search

Each number in the DOC ID column is a hyperlink that will provide detailed information about the Document Type.

To view Receipt details, refer to the Receipts tutorial.

9. Click the PO Number hyperlink in DOC ID column, the Purchase Order page.

The Purchase Order page provided the details to the orders such as type of commodity ordered and price

10. Click the Voucher Number hyperlink in DOC ID column, the Voucher Inquiry page appears.

On the Voucher Inquiry page, the Voucher Details panel provides the supplier's invoice information.

Document Status Requisition

Business Unit SJ000 Req ID WR00106595
 Document Date 04/03/2024 Status Approved
 Currency USD Document Type Requisition
 Requester Thal,Jacqueline Merchandise Amt 792.12
 Budget Status Valid

Requisitions Inventory Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts(1) Returns Vouchers(1) Payments(1)

Show All

Associated Document

Documents Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		SJ000	Purchase Order	3000051122	Dispatched	04/10/2024	0000004387	MAIN	🔍
▼ Actions		SJ000	Receipt	0000142746	Received	05/14/2024	0000004387	MAIN	🔍
▼ Actions		SJ000	Voucher	00486440	Posted	04/18/2024	0000004387	MAIN	🔍
▼ Actions	SJ000		Payment	789029	Posted	06/13/2024	0000004387	MAIN	🔍

Return to Search

Purchase Order Inquiry

Purchase Order

Business Unit SJ000 PO ID 3000051122 PO Status Dispatched
 Change Order 1 Budget Status Valid

▼ Header

PO Date 04/10/2024 Backorder Status Not Backordered
 Supplier Name 4IMP,INC-001 Supplier ID 0000004387 Receipt Status Received
 Buyer Nguyen,Johnson PO Reference WR00106595 JACQUELINE THAI Hold From Further Processing

Header Details Activity Summary
 Change Order Header Comments...
 All RTV Document Status
 Matching ▼ Actions

Amount Summary

Merchandise 672.08
 Freight/Tax/Misc. 63.01
 Total 735.09 USD
 Encumbrance Balance 0.00 USD

Lines

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		Coffee Mug	96611	72.0000	EA	203.04 USD	Closed
2		Set Up Charge	96100	1.0000	EA	61.54 USD	Approved
3		Stainless Bottle	96611	50.0000	EA	407.50 USD	Closed

Return to Search Notify Related Links

Voucher Inquiry

► Search Criteria

► Sort Criteria

► Display Currency Criteria

Voucher Inquiry Results

Voucher Details Accounts More Details Supplier Details

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	SJ000	00485183	24011-01	04/23/2024	0000000093	Postable	☐	Matched	OC MCDO-001

11. On the same Voucher Inquiry page, click the **Amounts** tab to view supplier's invoice amount.

Voucher Inquiry

- ▶ Search Criteria
- ▶ Sort Criteria
- ▶ Display Currency Criteria

Voucher Inquiry Results

Voucher Inquiry Results										
1-1 of 1										
View All										
Voucher Details Amounts More Details Supplier Details Filter										
Actions	Business Unit	Voucher ID	Transaction Currency	Gross Invoice Amount	Voucher Unpaid Balance	Unapplied Prepayments	Total Non-Merch	Entered VAT	Gross Amount Paid	Net Amount Paid
▼ Actions	SJ000	00485183	USD	8,533.62	0.00	0.00	0.00	0.00	8,533.62	8,533.62

12. Click the payment number hyperlink in DOC ID column, for the **Payment Inquiry** page.

Payment Inquiry

- ▶ Search Criteria
- ▶ Sorting Criteria

Payment Inquiry Result

Payment Inquiry Result										
1-1 of 1										
View All										
Payment Details Additional Info Supplier Details Financial Gateway Filter										
Actions	Source	Payment Reference ID	Payment Method	Amount	Currency	Creation Date	Payment Date	Payment Status	Reconciliation Status	Reconcile Date
▼ Actions	VCHR	789029	System Check	741.72	USD	06/13/2024	06/13/2024	Paid	Reconciled	07/01/2024

On the Payment Inquiry page, the **payment details** panel shows the check number [Payment Reference ID], amount, date of check, and if it has reconciled [cash].

Note: The Reconcile Date refers to the date SJSU uploaded the bank file and not the day check was cashed. In this snapshot, the reconcile date is 07/01/2024, so the check reconciled in the month of July.

References

- **Navigation Basics:** https://www.sjsu.edu/fabs/docs/tut_cfs_fluid_navbar.pdf
- **Receipts:** https://www.sjsu.edu/fabs/docs/tut_cfs_receipts.pdf