

**California State University, Long Beach Research Foundation
PeopleSoft Conversion Update**

PCS-004

June 29, 2012

As we move toward our new systems implementation date of 10/01/12, we wanted to make you aware of a couple of items related to Purchasing and Travel.

Purchasing

We will begin the input of Purchase Orders (POs) into the current system (IFAS) for the new fiscal year (2012-13) beginning on 07/02/12.

Travel

Travel requests will no longer be encumbered on a Purchase Order (PO). Instead, all travel must be pre-approved in accordance with the college/department travel procedures. If, however, the travel will be charged to a grant or contract, a Travel Authorization should be routed to the appropriate Grants & Contracts Administrator for prior compliance allowability review and approval as required by the Office of Research and Sponsored Programs (ORSP). Once the travel has been completed, a travel claim form (including appropriate documentation) must be approved by the appropriate administrator before submission to Marie Reed in the Research Foundation for reimbursement. If a travel advance needs to be issued or air arrangements with Global Travel need to be processed, or if foreign travel is involved, an approved travel request needs to be forwarded to Marie Reed in the Research Foundation. Existing travel encumbrances that have not been expended prior to 07/02/12 will be disencumbered.

Encumbrances

In addition to travel, we also want to make you aware that Petty Cash and Reimbursed Activities (i.e., Reimbursed Payroll) will no longer be encumbered on your account.