Approving a Purchase Requisition

This article covers how authorized purchase requisition approvers can approve purchase requisitions in CFS (Common Financial System).

💡 Don't have access to approve requisitions? Need to specify that you are the approver for a specific person? View the IT Access Request Form guides and/or web tutorials on how to fill out a Finance Access Request Form.

How does this process work?

Requisitions are reviewed and approved online in CFS before a purchase order is created. "Open" requisitions are reviewed and marked as "Approved" by an authorized Approver. A nightly batch process budget checks the eligible requisitions, and then the requisition becomes available for the Procurement department to source to a purchase order the following morning.

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Page 1

1. You will receive an email indicating that you have a purchase requisition to approve. Open the attached PDF file.
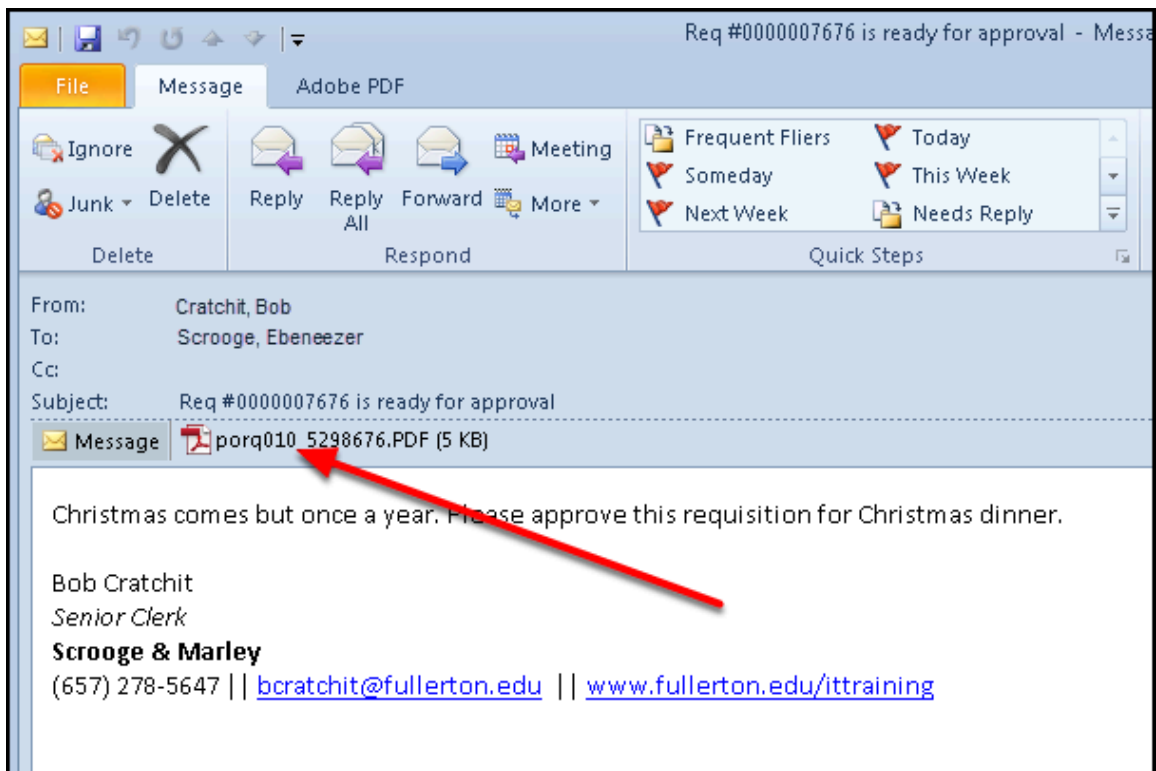
💡 You may want to copy the Requisition ID by highlighting the number and then holding down Ctrl + C (or Command + C on a Mac). This will allow you to paste the number when approving rather than having to type it out.

The Requester will send an email to their Approver notifying them of a requisition requiring their approval.

Open the attached PDF document to review the requisition.

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Page 2

2. Review the requisition for completeness and accuracy.

Review the requisition (and any attachments) for completeness and accuracy. All details of the requisition, including comments, are included in the PDF.

If any corrections need to be made, contact the Requester who created the requisition. You will receive an updated PDF via email when the corrections are made.

If the requisition is correct as is, proceed to the next step.

> ⚠️ It's important to ensure the chartfields are correct to avoid charging the requisition incorrectly.

3. Log in to CFS from Titan Online on the campus portal.

View How Do I Access CFS? for more information.

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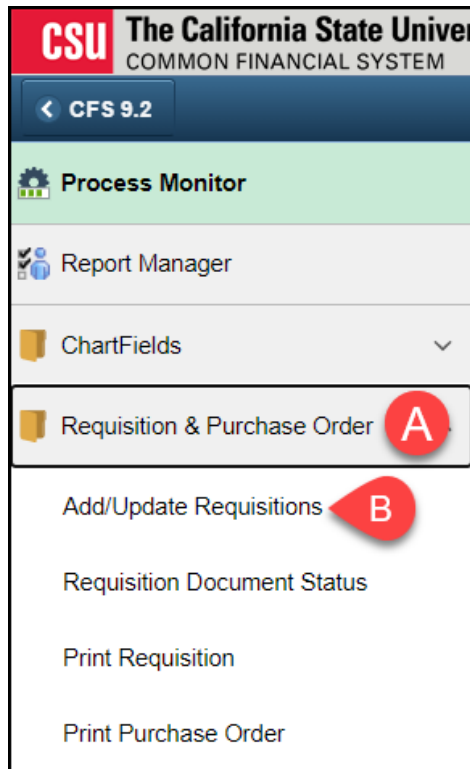
Page 3

4. Click on the CFS End User navigation tile.

💡 If you have added Add/Update Requisitions as a navigation tile to your personal CFS homepage, you can just click on the tile on your homepage. You can [view instructions on adding a navigation tile](#) for more information.

A. Click on the **CFS End User** tile.
B. Or you click on the NavBar icon to navigate to NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions.

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Page 4

5. Select Requisition & Purchase Order and then click Add/Update Requisitions.

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Page 5

6. Click Find an Existing Value.

Requisitions

Find an Existing Value	Add a New Value

Business Unit FLCMP 🔍

Requisition ID NEXT

Add

7. Enter the Requisition ID and then click Search.

A. Enter the Requisition ID from the email you received in step 1; if you copied the requisition number from the email, you can paste it in to this field.
B. Click **Search**.

Can't open the requisition?

If you get an error saying you do not have authorization to update the requisition, this means that you do not have authorization to approve that requester's requisitions. View the IT Access Request Form guides and/or web tutorials on how to fill out a Finance Access Request Form to add yourself as an approver for the requester.

Alternatively, a different approver who does have authorization to approve that requester's requisitions can approve the requisition. For example, most division finance managers have access to approve all requisitions created by the requesters in their division.

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Page 7

8. Click the approve icon.

When you are ready to approve the requisition, click the green checkmark icon at the top of the page.

> ℹ️ The requisition is automatically saved when you approve it.

Get an error when you clicked on the Approve icon?

Occasionally, you will see an error message that says the Accounting Period is not open. Follow the steps below to correct the issue by changing the Accounting Date to a date in the current Accounting Period/month.

1. Click OK on the error message.

The Accounting Date 2021-01-11 is not open. The Open period for FLCMP is from 2021-02-01 to 2021-02-28 (10200,373)

The Accounting Date is not open.

OK

2. Click on the calendar icon next to the Accounting Date.

3. Click Current Date.

You can choose any date in the current month, but for simplicity's sake you can simply click **Current Date**.

4. If the requisition does not automatically continue the approval,

click the Approve icon again.

Typically as soon as you correct the Accounting Date, the system will continue with the approval process and the Status will change to Approved.

If not, click on the green check mark icon again to approve the requisition.

9. Click Yes to save your approval.

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Page 10

10. You're done!

Once the Status is Approved, you're done! You can log out of CFS and/or close the window.

Need More Help?

Technical issue with CFS? Contact the IT Help Desk at helpdesk@fullerton.edu or 657-278-7777.

Questions about how to do something in CFS? Contact IT Training at ittraining@fullerton.edu or 657-278-5647.

Questions about procurement policies or status of a requisition/purchase order? Contact Procurement at DL-C_and_P@fullerton.edu.

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Page 11