CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

|	
How to Approve a Purchase Requisition	
On the Cal Poly Portal click **CSU Portal-Financial Administration** Continue with your 2-Step Verification sign-in process.	**CAL POLY | My Portal** Home Money Matters Personal Info **My Apps** ✉ Email & Calendar ▯ Cal Poly OneDrive ▮ HR Administration ▦ Student Administration ⑤ CSU Portal- Financial Administration ⟵ ▥ PolyData Dashboards Ⓦ Campus Wiki ▨ Electronic Workflow ⑦ Technical Service Request ▦ Facilities Requests **Directory Inform** Search this directory for Cal comply with applicable Univ **Simple Search** Switch to Advanced Search **Category** All **Weather** ⚙ ⌕ ✕ San Luis Obispo, CA Currently

Once in the CFS system, click on the diamond-shaped NavBar icon at the top right of the homepage, then follow this path:
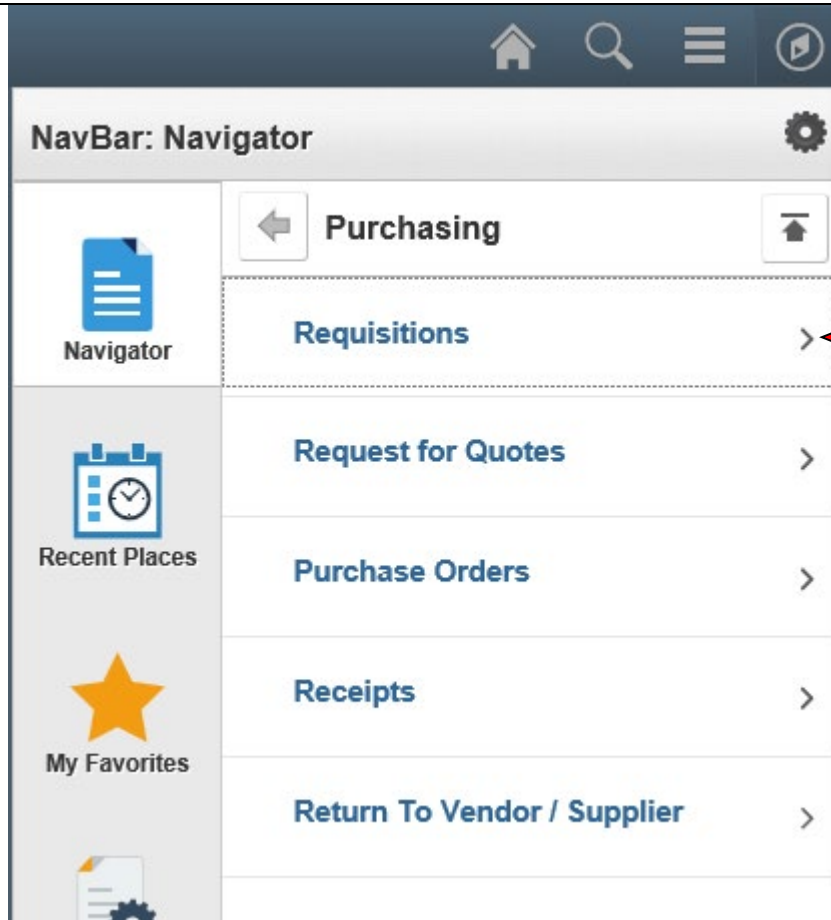
Navigator
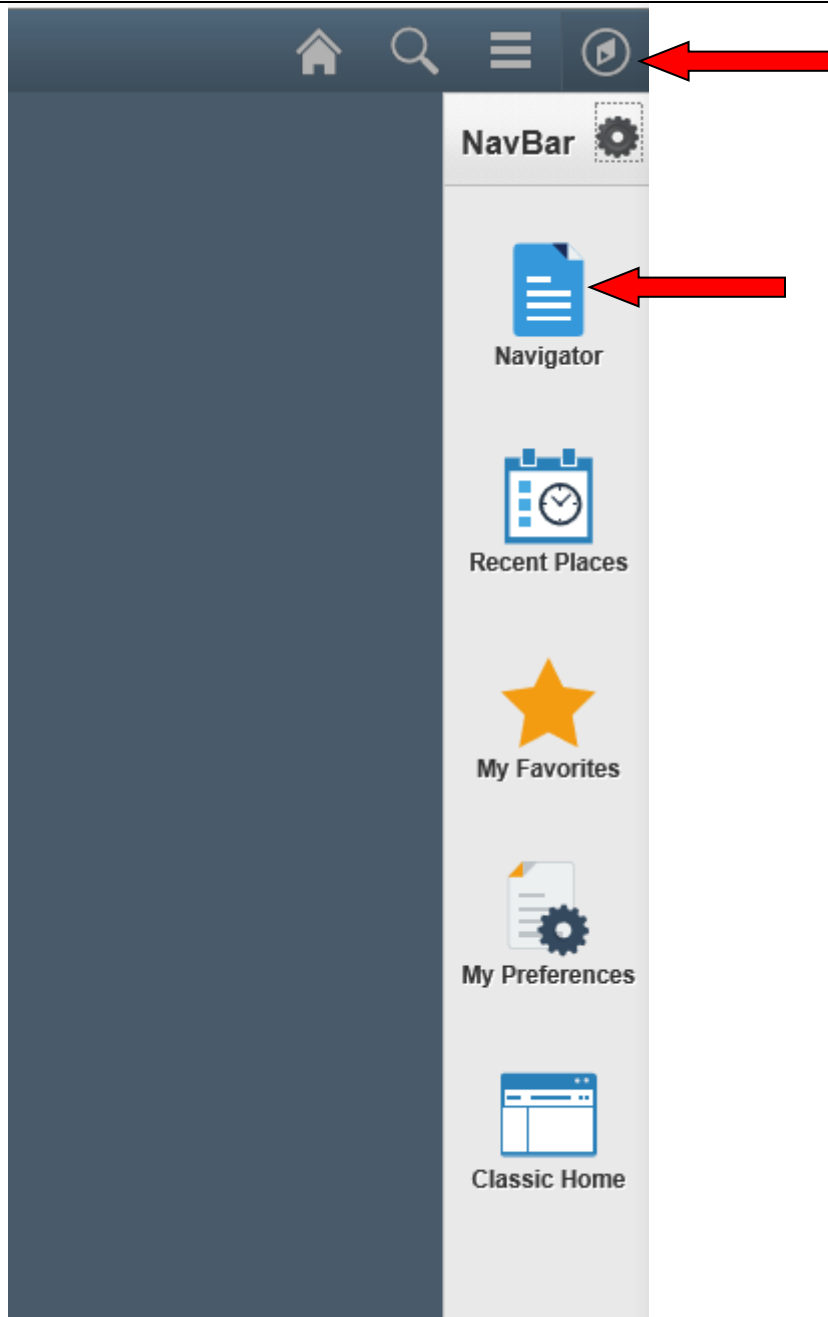
NavBar ⚙

Navigator

Recent Places

My Favorites

My Preferences

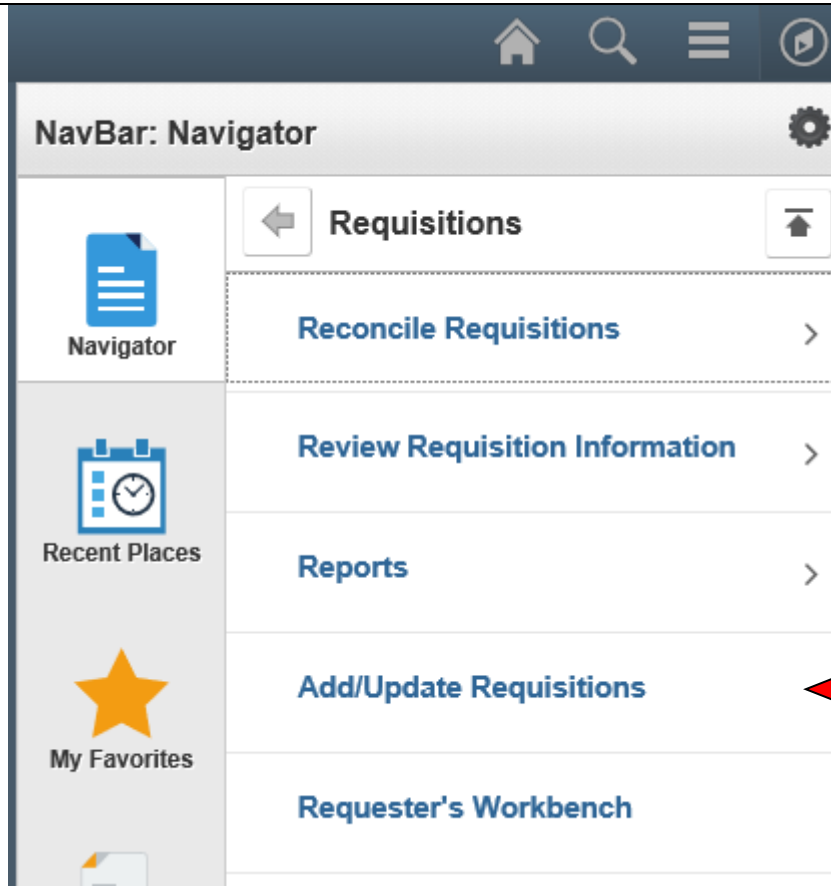Classic Home

Purchasing

Requisitions	

Add/Update Requisitions

This is the **Add/Update Requisitions** page.

Click the **Find an Existing Value** tab

ORACLE'

Requisitions

Find an Existing Value   Add a New Value

Business Unit SLCMP

Requisition ID NEXT

Add

Find an Existing Value | Add a New Value

Search by **Requester Name** (last name), or by **Requisition ID**. Your department's Requester provides the Requisition ID number to approve, or search using their last name. To avoid typing all of the digits of the requisition number in the **Requisition ID** field, type a **%** and only the **last 5 digits** of the requisition number.	**ORACLE** **Requisitions** Use the following search to look for an existing Requisition. **Find an Existing Value** | Add a New Value ▼ Search Criteria Business Unit = ▾ SLCMP 🔍 Requisition ID begins with ▾ %15555 ✕ Requisition Name begins with ▾ [____] Requisition Status = ▾ [____] ▾ Origin begins with ▾ [____] 🔍 Requester begins with ▾ [____] 🔍 Requester Name begins with ▾ [____] 🔍 Hold From Further Processing ☐ ☐ Case Sensitive [Search] [Clear] Basic Search 📰 Save Search Criteria Find an Existing Value | Add a New Value

Click anywhere along the blue hyperlinks in the Search Results line to pull up the requisition.	**Requisitions** Use the following search to look for an existing Requisition. [Find an Existing Value] [Add a New Value] ▼ Search Criteria Business Unit = ∨ SLCMP Requisition ID begins with ∨ %15555 ✕ Requisition Name begins with ∨ Requisition Status = ∨ Origin begins with ∨ Requester begins with ∨ Requester Name begins with ∨ Hold From Further Processing ☐ ☐ Case Sensitive [Search] [Clear] Basic Search 🔳 Save Search Criteria Search Results View All — First ◄ 1 of 1 ► Last Business Unit Requisition ID Requisition Name Requisition Status Origin Requester Requester Name Hold From Further Processing SLCMP 1000015555 SP0070 RFP DUMARS-SPACE STUDY Approved ONL 15017356789 Strain,Brandi Marie Lucia N Find an Existing Value | Add a New Value
Click **OK** through this message	Message Default comment added for Ship To Code 0820. Verify on Ship to comments page. (10100,142) The comment defaulted can be found in the Ship To Comments secondary page. To review the comments, click on the Ship To Comments hyperlink found under the Schedule page. [OK]

To approve a requisition, **complete these two steps, in order**:

1. Click on the **green check mark**

☑ in the upper right-hand corner of this page. Wait until **Status** changes from Open to **Approved**.

2. Click on the **magnifying glass icon** under the green check mark. Wait until **Budget Status** changes from Not Chk'd to **Valid**.

Let the Requester know you have approved the Requisition.

Maintain Requisitions
Requisition

Business Unit	SLCMP		Status	Open ☑ ✖
Requisition ID	1000017578		Budget Status	Not Chk'd 🔍
Requisition Name	1000017578			☐ Hold From Further Processing

▼ **Header** ⑦

*Requester	15017354085 🔍	Zinger,Makenzie	
*Requisition Date	03/10/2020 📅	Requester Info	
Origin	ONL 🔍	Online Entry	
*Currency Code	USD	Dollar	
Accounting Date	03/10/2020 📅		

Requisition Defaults   Edit Comments
Requisition Activities
Document Status

Amount Summary ⑦

Total Amount   184,479.00 USD

Add Items From ⑦

Purchasing Kit   Catalog
Item Search   Requester Items

Select Lines To Display ⑦

Search for Lines
Line [ ] 🔍 To [ ] 🔍   [Retrieve]

If you receive an error message, you might need to update the Accounting Date on this page. The Accounting Date must always be a date within the current month.

If you did not see a green check mark on this page, you are not set up to approve requisitions for this Requester. Contact Valerie Maijala 6-1187.

Once you have completed BOTH STEPS to approve a requisition, your Procurement Specialist will be able to pull over the requisition to begin their review.