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

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

Click the Find an Existing Value tab.

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.
Click anywhere along the blue hyperlinks in the Search Results line to pull up the requisition.

Click **OK** through this message
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.

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.