

Sending a Requisition for Approval

This article covers how purchase requisition Requesters can generate a PDF version of their purchase requisition and send it to the appropriate Approver.



You will need to save the requisition first to proceed with this process.

1. Log in to CFS from Titan Online on the portal and open the requisition you are ready to send for approval.

[View detailed steps to accessing CFS and finding an existing requisition.](#)

2. Select how you would like to retrieve a PDF of the requisition.

Download the PDF (View Printable Version)

1. Click on View Printable Version.

Maintain Requisitions

Requisition

Business Unit: FLCMP
 Requisition ID: 000024413
 Requisition Name: Commencement 2021 Materials [Copy From](#)

▼ **Header** ?

*Requester: 50802547190 [Solo,Han](#)
 *Requisition Date: 08/08/2022 [Requester Info](#)
 Origin: ONL [Online Entry](#)
 *Currency Code: USD [Dollar](#)
 Accounting Date: 08/08/2022
[Requisition Defaults](#) [Requisition Activities](#) [Edit Comments](#)

Add Items From ?

[Purchasing Kit Item Search](#) [Catalog Requester Items](#)

Line ?

[Details](#) ||

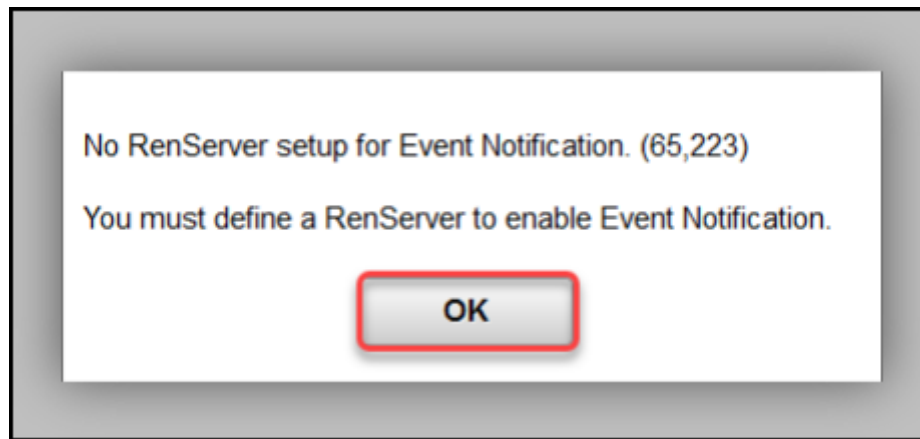
Line	Description	Quantity	*UOM
1	Lorem ipsum dolor sit	1.0000	LOT

[View Printable Version](#)

[Save](#) [Notify](#) [Refresh](#)

2. A RenServer message will pop up. Click OK to go back to the main screen.

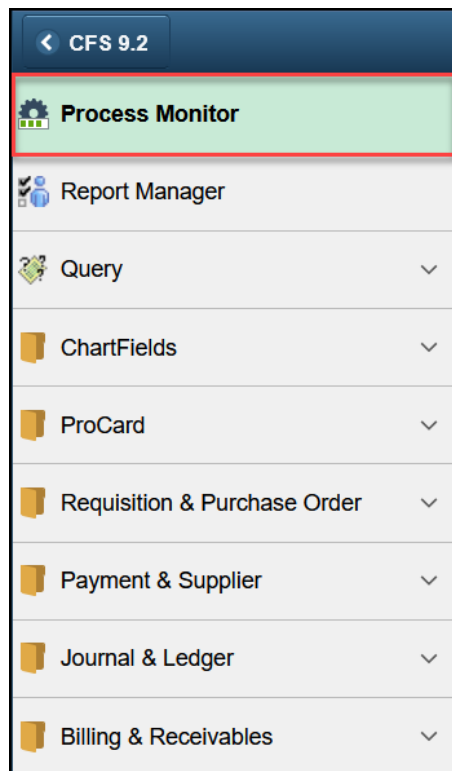
💡 Even though an error message appears, your print request is being processed.




3. Click on CFS End User to view the navigation menu.



4. Select Process Monitor.



5. Click the Details link next to the instance that you wish to view.

 The most recent entry will be at the top of the Process List.

[New Window](#) | [Help](#)

Process List Server List

View Process Request For

User ID:
Type: Last: 1 Days

Server: Name:
Instance From: Instance To: [Report Manager](#)

Run Status: Distribution Status: ☒ Save On Refresh

Process List

1-13 of 13

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	23444411		SQR Report	PORQ010	50802547190	08/08/2022 11:17:51AM PDT	Success	Posted	Details
<input type="checkbox"/>	23444410		SQR Report	PORQ010	50802547190	08/08/2022 10:51:13AM PDT	Success	Posted	Details
<input type="checkbox"/>	23444409		SQR Report	PORQ010	50802547190	08/08/2022 10:51:07AM PDT	Success	Posted	Details

6. Click View Log/Trace

Process Detail

Process

Instance: 23444411 Type: SQR Report
Name: PORQ010 Description: Requisition Print SQR
Run Status: Success Distribution Status: Posted

Run

Run Control ID: PS_REQ_FLCMP0000024413_3020089
Location: Server
Server: PSUNX
Recurrence:

Update Process

☐ Hold Request
☐ Queue Request
☐ Cancel Request
☐ Delete Request
☐ Re-send Content ☐ Restart Request

Date/Time

Request Created On: 08/08/2022 11:17:51AM PDT
Run Anytime After: 08/08/2022 11:17:51AM PDT
Began Process At: 08/08/2022 11:18:02AM PDT
Ended Process At: 08/08/2022 11:18:16AM PDT

Actions

Parameters Transfer
Message Log
Batch Timings
[View Log/Trace](#)

7. Select the PDF from the File List to view the requisition.

💡 Don't see a PDF in the File List? [View the Troubleshooting Printing a Requisition article.](#)

View Log/Trace

Report

Report ID	14027722	Process Instance	23444411	Message Log
Name	PORQ010	Process Type	SQR Report	
Run Status	Success			

Requisition Print SQR

Distribution Details

Distribution Node	FACFSTRN	Expiration Date	10/07/2022
-------------------	----------	-----------------	------------

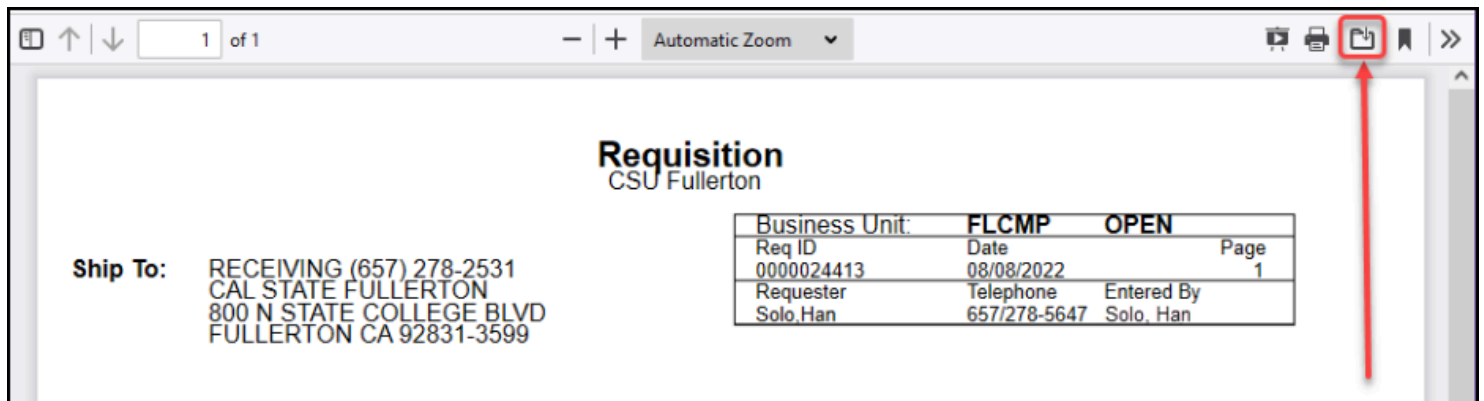
File List

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_23444411.log	1,715	08/08/2022 11:18:16.365858AM PDT
porq010_23444411.PDF	5,109	08/08/2022 11:18:16.365858AM PDT
porq010_23444411.out	70	08/08/2022 11:18:16.365858AM PDT

Distribute To

Distribution ID Type	Distribution ID
User	50894249424

8. Ensure all of the information is correct. Then, click the download button to save the PDF to your computer.



Email Me the PDF (Print Requisition/Run Control ID)

1. First, copy the Requisition ID number.

Maintain Requisitions

Requisition

Business Unit FLCMP

Requisition ID 0000021229

Requisition Name Commencement 2021 Materials

▼ Header (?)

*Requester 50802547190 Solo,Han

You can copy the Requisition ID by:

- Highlighting it and holding down CTRL + C (or Command + C on a Mac)
- Highlighting it, right-click (or Command + click), and select Copy
- Write down the Requisition ID on a piece of paper

2. Click on Print Requisition in the left menu under Requisition &

Purchase Order.

CSU

The California State University
COMMON FINANCIAL SYSTEM

CFS 9.2

CFS End User

[New Window](#) | [Help](#) | [Personalize Page](#)

Process Monitor

Report Manager

ChartFields

Requisition & Purchase Order

Add/Update Requisitions

Requisition Document Status

Print Requisition

Print Purchase Order

Maintain Requisitions

Requisition

Business Unit

FLCMP

Requisition ID

0000021229

Requisition Name

Commencement 2021 Materials

Header

*Requester

50802547190

Solo, Han

*Requisition Date

02/17/2021

Requester Info

Origin

ONL

Online Entry

*Currency Code

USD

Dollar

Accounting Date

02/17/2021

Amount Summary

3. First time users should click **Add a New Value** to create a Run Control ID. Returning users should click **Search** to find the Run Control ID they have already created.

Requisition Print

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

Find an Existing Value **A** Add a New Value

▼ **Search Criteria**

Run Control ID begins with

☐ Case Sensitive

Search **B** Basic Search Save Search Criteria

Search Results

View All |< < 1-1 of 1 > >|

Run Control ID
Send_For_Approval C

- First time users should click on **Add a New Value** and follow the instructions below to create a Run Control ID.
- Returning users who have already created a Run Control ID for sending requisitions for approval should click **Search**.
- Returning users can then select the Run Control ID that they already created.

First Time Users: Creating a Run Control ID

3.1. Click Add a New Value.

Requisition Print


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

Find an Existing Value
Add a New Value

▼ **Search Criteria**

Run Control ID begins with ▼

☐ Case Sensitive

Search
Clear
[Basic Search](#)

[Save Search Criteria](#)

3.2. Enter the Run Control ID name as **Send_For_Approval** or **SendForApproval**. Then click **Add**.

Requisition Print

Find an Existing Value Add a New Value

Run Control ID Send_For_Approval **A**

Add **B**

! Make sure there are no spaces in your Run Control ID or you will get an error message when you try to create the PDF.

- A. Enter a name for your Run Control such as **Send_For_Approval** or **SendForApproval**.
- B. Then click **Add**.

4. Enter the Business Unit, type or paste the Requisition ID, and select all of the Statuses. Then click Run.

Print Requisition

Run Control ID Send_For_Approval

Language English ☒ Specified Language ☐ Recipient's Language

Report Manager Process Monitor **D** Run

Report Request Parameters

A Business Unit FLCMP

B Requisition ID 0000021229

From Date

Through Date

Requester

Statuses to Include

☒ Approved **C** Select All

☒ Canceled

☒ Completed

☒ Open

☒ Pending

NOT On Hold

- A. Enter the Business Unit as **FLCMP**.
- B. Type or paste the Requisition ID.
- C. Click **Select All** to select all of the statuses.
- D. Click **Run**.

5. Change the Type to Email. Then click OK.

💡 Optionally, you can click on Distribution to change the Subject or Message Text (body) of the email that is sent to you, but it's not necessary.

Process Scheduler Request

User ID 50802547190

Run Control ID Send_For_Approval

Server Name

Run Date

02/17/2021

Recurrence

Run Time

1:54:13PM

Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	A Email	PDF	Distribution

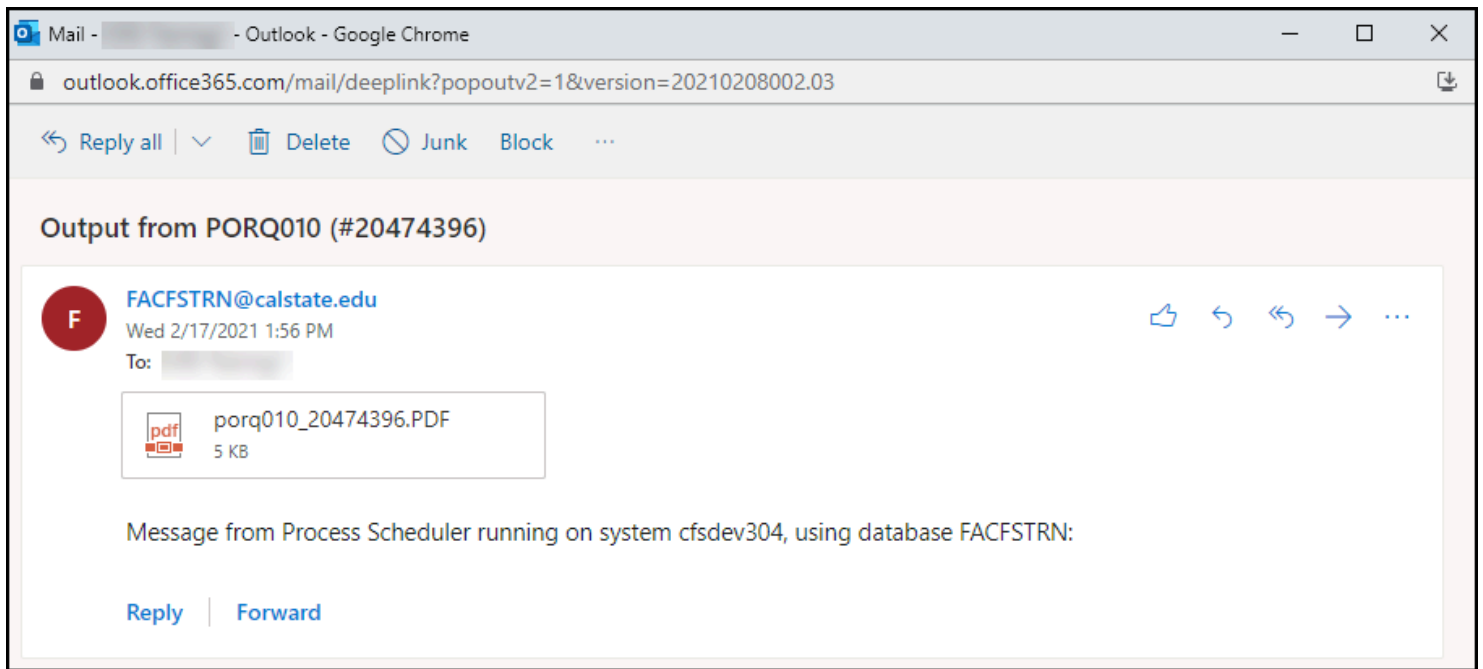
OK

B Cancel

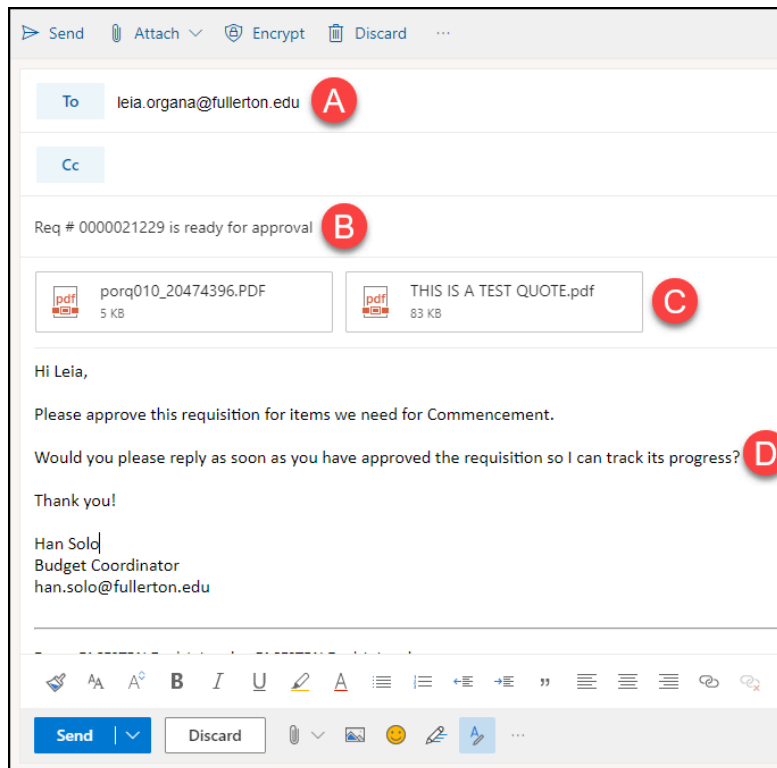
- A. Change the Type to **Email**.
- B. Then click **OK**.


6. You will receive an email with the PDF attached within about 5-10 minutes. Open the PDF and ensure that all of the information is correct.

💡 Didn't get the email? Or did you get an email with no PDF attached? [View the Troubleshooting Printing a Requisition article.](#)



3. Email the PDF to the appropriate Approver.



 Only Approvers who have been linked to you on a Finance Access Request Form will be able to approve your requisitions.

- A. Address the email to the appropriate Approver based on: 1) the department ID(s) you used on the purchase requisition, and 2) the Approvers who have been linked to you on the Finance Access Request Form.
- B. Be sure to include the Requisition ID either in the Subject or the body of the email so the Approver can copy/paste it when approving the requisition.
- C. In addition to attaching the PDF of the requisition, you may also want to attach the vendor quote or other supporting documentation for the Approver to review.
- D. In the body of the email, include any details you would like the Approver to know. You may also want to ask them to reply to the email when they have approved the requisition as you will NOT get any notification from CFS when your requisition is approved.

Next Steps

[The approver will need to view the PDF and then log in to CFS to approve the requisition.](#)

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.