



The Requisition Approval page provides a tool for identified CSUF employees to approve requisitions directly in CMS.

The list of requisitions that may be viewed by each Approver will be limited to requisitions in “Pending Approval” status. Requisitions displayed in the approver’s list are only the requisitions that the Approver has “approval” authority over. An Approver may also be a designated “Alternate” approver. When the “Default” Approver is out of the office (i.e. vacation) any other valid “Default” Approver can approve the requisition as long as they are listed on the preparer set-up.

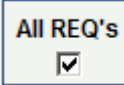

Frequency: Ad-hoc (as needed). Transactions will occur throughout the year.

<p>Step 1</p> <p>An email will be sent to the Approver notifying him/her of a requisition pending his/her approval.</p> <p>The Approver must sign in to CMS to approve the requisition.</p>	<p>From: larthur@Exchange.FULLERTON.EDU [mailto:larthur@Exchange.FULLERTON.EDU] Sent: Wednesday, December 03, 2008 4:05 PM To: Ledyard, Lyn Subject: TEST - REQ 000004023 Submitted For Your Approval</p> <p>NOTE: This email is a test from FFULSTG. Please do not act on this email unless you are participating in a test.</p> <p>Requisition 000004023, for vendor DELL COMPUTERS LP, has been submitted for your review and approval. This Requisition was prepared by Arthur, Lori.</p> <p>To review and approve this Requisition go to the REQ Approval page.</p>																								
<p>Step 2</p> <p>Navigate to the REQ Approval page:</p> <p>Home > Fullerton Customizations > PO > REQ Approval</p> <p>Note: You may navigate to the appropriate link using the menu list on the left or the link in the body of the page.</p>	<p>The screenshot shows the 'Fullerton Customizations' menu. The 'PO' folder is circled in red. Below it, the 'REQ Approval' link is also circled in red.</p>																								
<p>The REQ Approval page displays.</p> <p>Note: Only requisitions which the Approver was notified by email to approve will display.</p>	<p>The screenshot shows the 'REQ Approval' page. It includes search filters for Preparer, Requester, and Req ID. Below the filters is a table of pending requisitions:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Req ID</th> <th>Req Type</th> <th>Req Date</th> <th>REQ Amount</th> <th>Preparer</th> <th>Requestor</th> <th>Vendor Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>000004024</td> <td>Regular Order</td> <td>10/01/2008</td> <td>10,825.00</td> <td>Arthur, Lori</td> <td>Lori Arthur, x7777</td> <td>ABC USD</td> </tr> <tr> <td><input type="checkbox"/></td> <td>000004026</td> <td>Regular Order</td> <td>11/26/2008</td> <td>808.13</td> <td>Arthur, Lori</td> <td>Lyn Ledyard, x7777</td> <td>ORANGE CNTY REGISTER</td> </tr> </tbody> </table>	Select	Req ID	Req Type	Req Date	REQ Amount	Preparer	Requestor	Vendor Name	<input type="checkbox"/>	000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori	Lori Arthur, x7777	ABC USD	<input type="checkbox"/>	000004026	Regular Order	11/26/2008	808.13	Arthur, Lori	Lyn Ledyard, x7777	ORANGE CNTY REGISTER
Select	Req ID	Req Type	Req Date	REQ Amount	Preparer	Requestor	Vendor Name																		
<input type="checkbox"/>	000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori	Lori Arthur, x7777	ABC USD																		
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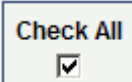



Step 3

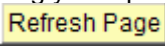
To display all requisitions for which the Approver has approval authority,

click , then .

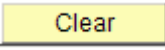
To select all pending requisitions in the list,

click .

To filter the Pending Requisitions list, enter one or more display options by using the lookup icon . After entering your options,

click .

To clear any display options you have made,

click .

Field	Definition
Preparer	Individual who entered the requisition in CMS.
Requester	Individual requesting the requisition. Must be entered exactly as on requisition. Can use wildcard % to search.
Req ID	Requisition ID number automatically assigned by CMS.
Check All	By selecting this option, all requisitions will be check marked to be either Approved or Returned.
All REQ's	By selecting this option, <u>all</u> pending requisitions in which the Approver has approval authority will display on the approval list, including requisitions in which the Approver is listed as an "Alternate" approver.

Step 4

To view requisition details, click on the hyperlinked Req ID number.

The approver is authorized to modify any portion of the requisition originally created by the Preparer.

Term	What do I need to enter?
Select (Required)	Placing a checkmark in this box selects this requisition for approval or returning to Preparer.
Req ID	No entry required. The Req ID is the requisition ID number auto assigned when the requisition was saved.
Req Type	No entry required. Req Type was selected when requisition was created.
Req Date	No entry required. The Req Date is the date the requisition was created.
Req Amount	No entry required. The Req amount is the total amount of the requisition.
Preparer	No entry required. The Preparer is the person who prepared the requisition.
Requestor	No entry required. The Requestor is the person who requested the requisition.
Vendor Name	No entry required. The Vendor Name for the requisition displays here.



Returning a Requisition with Standard Message

Step 1

Check the box(es) next to the requisition(s) you want to return to the Preparer.

Note: To return a requisition with a Customized Message to the Preparer, see instructions on Page 5.

REQ Approval

Approver Arthur, Lori

Display Options				Approval Options	
Preparer	<input type="text"/>			Approve	Return
Requester	<input type="text"/>				
Req ID	<input type="text"/>				
Check All	All REQ's	Refresh Page	Clear		

Pending Requisitions						
	Select	Req ID	Req Type	Req Date	REQ Amount	Preparer
▲	<input checked="" type="checkbox"/>	0000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori
▲	<input type="checkbox"/>	0000004026	Regular Order	11/26/2008	808.13	Arthur, Lori

Step 2

Click .

By clicking this button, the Preparer will receive a system generated email stating the requisition has been returned for additional work.

REQ Approval

Approver Arthur, Lori

Display Options				Approval Options	
Preparer	<input type="text"/>			Approve	Return
Requester	<input type="text"/>				
Req ID	<input type="text"/>				
Check All	All REQ's	Refresh Page	Clear		

Pending Requisitions						
	Select	Req ID	Req Type	Req Date	REQ Amount	Preparer
▲	<input checked="" type="checkbox"/>	0000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori
▲	<input type="checkbox"/>	0000004026	Regular Order	11/26/2008	808.13	Arthur, Lori

The returned requisition(s) will fall off the "Pending Requisitions" list and the status returns to "Open".

The Preparer may now access the returned requisition via the REQ Data Entry page.

Pending Requisitions						
	Select	Req ID	Req Type	Req Date	REQ Amount	Preparer
▲	<input type="checkbox"/>	0000004026	Regular Order	11/26/2008	808.13	Arthur, Lori

Example of the email sent to the Preparer if the requisition has been returned for additional work (Standard Message).

From: larthur@Exchange.FULLERTON.EDU
To: Arthur, Lori
Cc:
Subject: TEST - REQ 0000004024 Has Been Returned For Additional Work

Sent: Wed 12/3/2008 11:27 AM

NOTE: This email is a test from FFULSTG.
Please do not act on this email unless you are participating in a test.

Requisition 0000004024, for vendor ABC USD, has been returned to you by Arthur, Lori for additional work.
To continue work on this Requisition go to the REQ Data Entry page.



Approving a Requisition with Standard Message

Step 1

Check the box(es) next to the requisition(s) you want approve.

Note: If you would like to send a Customized Message to the Preparer before approving the requisition, see instructions on Page 5.

REQ Approval

Approver Arthur, Lori

Display Options		Approval Options	
Preparer	<input type="text"/>	<input type="button" value="Approve"/>	<input type="button" value="Return"/>
Requester	<input type="text"/>		
Req ID	<input type="text"/>		
<input type="checkbox"/> Check All	<input type="checkbox"/> All REQ's	<input type="button" value="Refresh Page"/>	<input type="button" value="Clear"/>

Pending Requisitions					
Select	Req ID	Req Type	Req Date	REQ Amount	Preparer
<input checked="" type="checkbox"/>	0000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori
<input type="checkbox"/>	0000004026	Regular Order	11/26/2008	808.13	Arthur, Lori

Step 2

Click .

By clicking this button, the selected requisition(s) are approved and the Preparer will receive a system generated email stating the requisition has been approved.

The status is now "Approved".

REQ Approval

Approver Arthur, Lori

Display Options		Approval Options	
Preparer	<input type="text"/>	<input checked="" type="button" value="Approve"/>	<input type="button" value="Return"/>
Requester	<input type="text"/>		
Req ID	<input type="text"/>		
<input type="checkbox"/> Check All	<input type="checkbox"/> All REQ's	<input type="button" value="Refresh Page"/>	<input type="button" value="Clear"/>

Pending Requisitions					
Select	Req ID	Req Type	Req Date	REQ Amount	Preparer
<input checked="" type="checkbox"/>	0000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori
<input type="checkbox"/>	0000004026	Regular Order	11/26/2008	808.13	Arthur, Lori

The approved requisition(s) will fall off the "Pending Requisitions" list and will now be forwarded to Contracts and Procurement for processing.

No further modifications can be made by the Preparer or Approver.

Pending Requisitions					
Select	Req ID	Req Type	Req Date	REQ Amount	Preparer
<input type="checkbox"/>	0000004026	Regular Order	11/26/2008	808.13	Arthur, Lori

Example of the email sent to the Preparer when the requisition has been approved (Standard Message).

From: lledyard@exchange.fullerton.edu
 To: Arthur, Lori
 Cc:
 Subject: TEST - REQ 0000004023 Has Been Approved




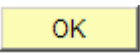



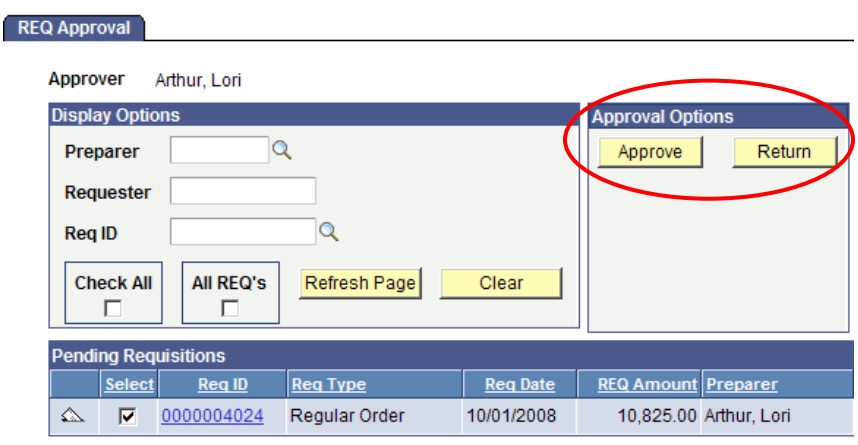
Sent: Wed 12/3/2008 4:13 PM

NOTE: This email is a test from FFULSTG.
 Please do not act on this email unless you are participating in a test.

Requisition 0000004023, for vendor DELL COMPUTERS LP, has been approved by Ledyard, Lyn. This Requisition is now being worked by C & P.

To review this Requisition go to the REQ Inquiry page.



<p>Customized Email</p> <p>Approvers have the option of customizing the email that will be sent to the Preparer when returning or approving the requisition.</p> <p>Step 1</p> <p>Click .</p>	 <table border="1"> <thead> <tr> <th colspan="4">Pending Requisitions</th> </tr> <tr> <th>Select</th> <th>Req ID</th> <th>Req Type</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0000004027</td> <td>Regular Order</td> <td></td> </tr> </tbody> </table>	Pending Requisitions				Select	Req ID	Req Type		<input type="checkbox"/>	0000004027	Regular Order										
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Select	Req ID	Req Type																				
<input type="checkbox"/>	0000004027	Regular Order																				
<p>When  is selected, an email message page opens.</p> <p>Step 2</p> <p>Type your customized email message that will be sent to the Preparer.</p> <p>Click  when finished.</p> <p>You will be taken back to the REQ Approval page.</p>	 <p>Email Message</p> <p>Req ID: 0000004027 Preparer: Arthur, Lori Requestor: Lyn Ledyard, x7777</p> <p>Message: Please provide more detail on the items being ordered and then resubmit for approval.</p> <p>OK Cancel</p>																					
<p>Step 3</p> <p>Click  to send the customized email to the Preparer.</p> <p>OR</p> <p>Click  to send the customized email to the Preparer.</p>	 <p>REQ Approval</p> <p>Approver: Arthur, Lori</p> <p>Display Options: Preparer, Requester, Req ID, Check All, All REQ's, Refresh Page, Clear</p> <p>Approval Options: Approve Return</p> <table border="1"> <thead> <tr> <th colspan="7">Pending Requisitions</th> </tr> <tr> <th>Select</th> <th>Req ID</th> <th>Req Type</th> <th>Req Date</th> <th>REQ Amount</th> <th>Preparer</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>0000004024</td> <td>Regular Order</td> <td>10/01/2008</td> <td>10,825.00</td> <td>Arthur, Lori</td> <td></td> </tr> </tbody> </table>	Pending Requisitions							Select	Req ID	Req Type	Req Date	REQ Amount	Preparer		<input checked="" type="checkbox"/>	0000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori	
Pending Requisitions																						
Select	Req ID	Req Type	Req Date	REQ Amount	Preparer																	
<input checked="" type="checkbox"/>	0000004024	Regular Order	10/01/2008	10,825.00	Arthur, Lori																	



<p>Example of the email sent to the Preparer if the requisition has been returned for additional work, with customized comments from the Approver.</p>	<p>From: larthur@Exchange.FULLERTON.EDU Sent: Wed 11/26/2008 To: Arthur, Lori Cc: Subject: TEST - REQ 0000004027 Has Been Returned For Additional Work</p> <p>NOTE: This email is a test from FFULSTG. Please do not act on this email unless you are participating in a test.</p> <p>Requisition 0000004027, for vendor UNITED NATIONS PUBL, has been returned to you by Arthur, Lori for additional work. To continue work on this Requisition go to the REQ Data Entry page.</p> <p>Please provide more detail on the items being ordered and then resubmit for approval.</p>
<p>Example of the email sent to the Preparer when the requisition has been approved, with customized comments from the Approver.</p>	<p>From: larthur@Exchange.FULLERTON.EDU Sent: Wed 11/26/2008 To: Arthur, Lori Cc: Subject: TEST - REQ 0000004028 Has Been Approved</p> <p>NOTE: This email is a test from FFULSTG. Please do not act on this email unless you are participating in a test.</p> <p>Requisition 0000004028, for vendor AARDVARK CLAY & SUPPLIES, has been approved by Arthur, Lori. This Requisition is now being worked by C & P.</p> <p>To review this Requisition go to the REQ Inquiry page.</p> <p>Approved this request.</p>



The following table is a list of CMS field names and their definitions used throughout this guide.

Field	Definition
Display Options	
Preparer	Individual who entered the requisition in CMS.
Requester	Individual requesting the requisition. Must be entered exactly as on requisition. Can use wildcard % to search.
Req ID	Requisition ID number automatically assigned by CMS.
Check All	By selecting this option, all pending requisitions will be check marked to be either Approved or Returned.
All REQ's	By selecting this option, <u>all</u> pending requisitions in which the Approver has approval authority will display on the approval list, including requisitions in which the Approver is listed as an "Alternate" approver.
Approval Options	
Approve	Electronically approves the requisition.
Return	Sends the requisition back to the Preparer. Changes Req Status back to 'Open'.
Pending Requisitions	
Select (Required)	Placing a checkmark in this box selects this requisition for approval or returning to Preparer.
Req ID	Requisition ID number automatically assigned by CMS.
Req Type	Req Type was selected when requisition was created.
Req Date	Date requisition was created in the CMS system.
REQ Amount	Total requisition amount
Requestor	Individual requesting the requisition.
Vendor Name	Vendor name selected when requisition was created.