
Requisition Privileges

This document contains notes about how an employee is authorized to enter or approve a Purchase Requisition ("Req") in CFS.

Note that there are two different kinds of requisitions:

1. Electronic requisitions in CFS.
These privileges are controlled by CFS roles.
2. Paper requisitions.
These privileges are controlled by the DART "DP/PPO" box, which stands for "Direct Payment/Paper Purchase Order".
These privileges were controlled by the DoA "Req" box, which has been removed.

A Brief History of the Requisition Privilege in CFS and DoA

The CFS Roles and Requesters have been around forever. Their function has not changed. More details about these Roles and Requesters will follow.

DoA has seen some changes. In summary, DoA moved from CFS to CMS and the "Req" box was removed.

Here are more details about the DoA timeline:

1. DoA was originally in CFS, and included the "Req" check box to indicate requisition authority.
2. Oct 2017, the "Req" check box was removed from CFS-DoA.

[CFS Delegation of Authority Inquiry Screen Enhancement Announcement](#)

This caused some confusion because users thought that the privilege to create and approve purchase requisitions was controlled by it. But, that is not the case. The "Req" privilege was removed from the CARS form because it was not used, and was therefore misleading.

3. Also in Oct 2017, DART went production. It was intended to replace CFS-DoA. It never had the "Req" box.
4. About this time, the "Req" box was removed from the CARS request form
5. Feb 23, 2018, the CFS-DoA module was retired, along with the last trace of the "Req" box.

CFS Roles and Requesters (Electronic Requisitions)

Authorization for Requisitions in CFS is determined by CFS roles. DART is not used for this function.

The creation of requisitions is controlled by the CFS Role "CFSCSU_PO_Requisitions_01". Approval of requisitions is controlled by the CFS Role "CFSCSU_PO_Requisitions_02". This is the CFS menu that IRT uses to control Roles:

PeopleTools > Security > User Profiles > Distributed User Profiles > (General & User Roles)
These Roles are managed via CARS requests.

CFS also displays a field called "Requester" alongside each role. This value is not used. It is only a text description, and does not affect what department a person can charge.

This is the CFS menu that IRT uses to control Requesters:

Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Distributed User Profiles > User Preferences > Procurement > Requisition Authorizations

These Requesters are managed via CARS requests.

Paper Requisitions (Not CFS)

Although the vast majority of Requisitions are electronic, once in a long while (e.g. end of fiscal year) a paper Requisition is issued. Examples of paper used for Requisitions are:

- Paper PO amendments
- Paper Requisitions
- Paper contracts

For paper Requisitions, authority will be determined via DART. The authorization will be determined by the "Direct Payment/Paper Purchase Order" authorization, which is labeled "DP/PPO".