Guide to Making Purchase Requisitions

This guide is intended for SFU employees that need to create purchasing requisitions to buy materials or services. It covers the process of setting yourself up as a requester, and creating and reviewing purchase requisitions in SFU’s PeopleSoft Financials System (FINS).

Getting to the Purchasing Center

1. Log into FINS – fins.sfu.ca -- using your SFU computing ID.
2. Once you are logged in, navigate to the Purchasing Center from the top menu by clicking Main Menu – SFU – Purchasing – Online Access.

Getting Set Up as a New Requester

To access your requisitions, purchase orders, and receipts, you must first be set up as a requester within FINS. (If you are already set up as a requester, please skip to the next section of the guide, Creating Purchase Requisitions.)

1. From the Main Menu, navigate to Requester Setup.
2. From the Requester Setup page, you will be able to configure requisition defaults such as ship to, location, and phone. Based on your SFU ID, the majority of required fields will already be completed. Please review to ensure that everything is correct and make any changes required.

Ship To: Building/room number where you want to receive the goods
Location: Your campus (should auto-populate)
Phone: Format is 10 digits, no spaces
Delegating Users

You may also delegate other (authorized) SFU employees to enter and access requisitions on your behalf:

1. In the Authorize Users section of the Requester Setup page, click the + to the right of your name.
2. Change Name from Begins With to Contains and enter a name to search.
3. Once you have located your delegate, click their name to have it show in the Authorized Users field.
4. If you are adding multiple delegates, repeat the above steps until finished.
5. To remove authorization access, click the – to the right of the user’s name.

Creating Purchase Requisitions

Once you are set up as a requester, you may create a requisitions in FINS.

1. Click Add/Update under Requisitions on the Purchasing Center panel. From the Add a New Value tab, click Add to load the requisition entry page

2. Name the requisition using the Requisition Name field (optional but recommended as this will help locate the requisition in the future).
3. Enter your Department Name.
4. If different from your default (CAD), change the Currency to be used for this Requisition.
5. Click on **Requisition Defaults** to confirm or change the chart of account (COA) string. If required, update the Fund, Department, Program and Project and/or Activity (if applicable).

Note: The default account string is uploaded with your user ID. To permanently change your defaults, contact Procurement.

To update a project, enter the Project Alias and press the **Tab** keyboard key. The account string will override the previous defaults and auto-populate the project information.

6. To add a general comment or instructions for the Buyer, click on **Add Comments**. Type a message in the data box. If you would like your comment printed on the requisition, click **Send to Supplier**.
7. From the main Requisition page, enter the details of your requisition in the Lines section, ensuring that you complete all sections marked with an asterisk (*).

8. Under Description, enter the name of the item you are requesting. To view the full description, select the expand icon.

9. Choose a Category. Click the field’s search icon to choose.

10. Enter required Quantity.

11. Specify the unit of measure (UOM). Click the field’s search icon to choose.

12. Enter the Price (per item) if known; otherwise leave blank.

13. Optionally, choose a Due Date. Click the calendar icon to select the desired date.

14. To ship your order somewhere other than your default location, click the Ship To search icon to load options. If the location is not in the results, leave field blank and add a comment in the Add Comments section (see above).

15. Optionally, you may select a Supplier. Click on the field’s search icon to choose. If the supplier is not in the search results, include the supplier information in the Add Comments section (see above).

16. Enter the supplier part number or product ID in the Supplier Item ID section.

17. To include additional information/comments or to upload a supplier quote, click on the Line Comments icon. If you want your comments to print on the Requisition, click Send to Supplier.

18. To add additional lines, click the Add Line (+) button and repeat steps 1 to 10. To delete any additional lines, click the Delete Line (-) button.
19. To split costs between multiple account strings, click on the **Distribution** tabs. Split the amounts (by percentage or dollar value). Update the Fund, Department, Program. For projects, use the Project Alias.

Note: The object code is auto-populated based on the category code that you have selected and cannot be modified.

20. Click **Save** to save the requisition in FINS. The Requisition ID will change from NEXT to a 10-digit requisition number 00000XXXXX.

To complete the requisition process, click on the (Submit for Approval) checkbox next to **Status**. The status will change from **Open** to **Pending**.

(NOTE: Clicking Save does not submit the requisition for processing.) If the requisition is greater than or equal to $50,000 CAD, you will receive a message saying “Competitive Bidding Required. Please contact Purchasing.”
20. Record the requisition number, then click on View Printable Version. A pop up screen will appear and progress from “queued” to “success.” A pdf version of the requisition will open.

NOTES:
- The queued, success, and pdf document processing is slow and can take 30-45 seconds per action.
- If you do not see the “queued/success” status, or if you do not receive a pdf document, your pop up blockers have prevented the new pages from being actioned. Click “always allow” to grant FINS permission or speak to your IT support for assistance.

Requisition Approvals

The Requester signs the requisition (requester - top box).

The PI, Manager, Account Holder, or Delegate approves the expense by also signing the requisition (approval - bottom box).

Where to Send your Requisition

Send a copy of your signed requisition and any supporting documentation (quotes, supplier details, etc.) to:

Science Stores orders: send the signed requisition to Science Stores.

Research Accounts (Funds 25, 31, 35, and 36): pre-approval is required. Send the signed requisition to the RA Account Manager assigned to your project.

Specific Purpose Accounts (Funds 13 and 21): pre-approval is required. Send the signed requisition to Specific Purpose for pre-approval.

All other accounts: send the signed requisition to Procurement Services

***

If you are encountering problems with the above procedures, email Procurement Services at scm_help@sfu.ca or call 778-782-4388.