A. APPROVING A REQUISITION

1. Go to fins.sfu.ca and login (SFU UserID and password)

STEP 1

From the SFU End-User WorkCentre:

1. Navigate to My Work - Procurement Management
2. If the My Work tab is collapsed, click the drop down box, and select Expand

3. Select: Requisitions Pending Approval

STEP 2

1. From Manage Requisition Approvals, navigate to the Requisitions Section

2. To view a requisition in its original currency, click on the Requester tab. The fund will change from CAD to the foreign currency

3. Locate the requisition to be approved and click on the Req ID
4. **Review the Requisition Approval page**

   ![Image of Requisition Approval page]

   a. **Currency**: Toggle between CAD (Approver) and Foreign/Original (Requester) currency.
   
   b. **Requester’s Justification**: Requester’s comments justifying the purchase requisition (optional).
   
   c. **Header Comments/Attachments**: Select the Header Comments/Attachments to view comments or attachments uploaded by the requester at the header level.
   
   d. **Chartfield Summary or View Line Details**: To view Chartfield (Chart of Account) information, select either the Chartfield Summary or View Line Details buttons.
   
   e. **Budget Approver Summary Page**: Click the drop down box and select an Approver to view the lines they can approve.
   
   ![Image of Budget Approver Summary Page]

   f. **Line Information and Requester’s Comments**: Review the requested amount details and click on the Requester’s Comments (thought bubble) to review line-level attachments or comments.
   
   ![Image of Line Information and Requester’s Comments]

   g. **Review/Edit Approvers**: Click on the arrow to expand the box. This field allows the Approver to see how the requisition has routed.
   
   ![Image of Review/Edit Approvers]

   h. **Comments**: Comments are mandatory for the Deny and Hold action buttons and optional for an Approve action.
   
   i. **Action Buttons**: Approvers have the ability to perform the following three actions:
      
      - **Approve** – Approves any selected line(s) and moves the Requisition to the Budget Approver stage.
      - **Deny** – The deny button rejects any selected lines. It should only be used when the item is no longer required.
      - **WARNING**: When the Deny button is actioned, no further adjustments can be made. The requester must submit a new requisition for any denied lines.
      - **Hold** – Use the hold button when further information, clarification, or action is required. The requisition is pulled from the approval queue until the Approver either actions the line(s), or the requester updates and resubmits the requisition into workflow.

5. Once the approval process is complete, the system will generate confirmation. Click **Return to Approve Requisitions** to process additional requisitions.
B. TO ACTION REQUISITIONS PREVIOUSLY PLACED ON HOLD

From the SFU End-User WorkCentre:

1. Navigate to My Work - Procurement Management
2. Select: Requisitions on Hold

3. The system will filter the Manage Requisition Approvals page and will only display requisitions on hold. Click on the Requisition hyperlink.

4. To approve the Requisition, click on the Req ID. Review the requisition details* and select one of the following Action Buttons:
   - **Approve** – The approval button approves the selected line(s) and moves the Requisition to the next stage.
   - **Deny** – The deny button rejects any selected lines. It should only be used when the item is no longer required.
     
     **WARNING:** When the Deny button is actioned, no further adjustments can be made. The requester must resubmit a new requisition for any denied lines.
   - **Hold** – Use the hold button when further information, clarification, or action is required. The requisition is pulled from the approval queue until the Approver either actions the line(s), or the requester updates and resubmits the requisition into workflow.

To action all lines: ensure all lines are check marked and select the desired action button.
To action some of the lines: click Deselect All, tick the line-level check boxes, and select the desired action button.

Comments: Comments are mandatory for the Deny and Hold action buttons and optional for an Approve action.

Once the approval process is complete, the system will generate confirmation. Click Return to Approve Requisitions to process additional requisitions.

*For more information on reviewing requisition details, see Page 2, Section 4 - Review the Requisition Approval page.
C. ACCESSING PREVIOUSLY APPROVED/DENIED REQUISITIONS

Option 1 – If there are Requisitions pending approval (line is clickable/hyperlinked):

From the SFU End-User WorkCentre:

Navigate to My Work - Procurement Management
Select: Requisitions Pending Approval

For Options 1 and 2:

a. From the Status Tab: Click on the dropdown menu and select the desired status.
   Click Search

   ![Image of Manage Requisition Approvals]

   b. The system will display Approved status requisitions.

Option 2 – If there are NO requisitions Pending Approval:

From the SFU End-User WorkCentre:

Navigate to Links – Procurement Management
Select: Manage Requisition Approvals

D. ADDITIONAL HELP

1. Additional Requisition & PO management information – Procurement Website
2. FINS Tutorial/Online Knowledge Centre – UPK
3. Contact Procurement at 778.782.4260, 778.782.4301, or procurement@sfu.ca