

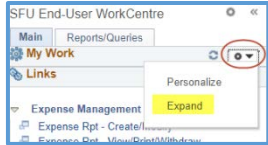
A. APPROVING A REQUISITION

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

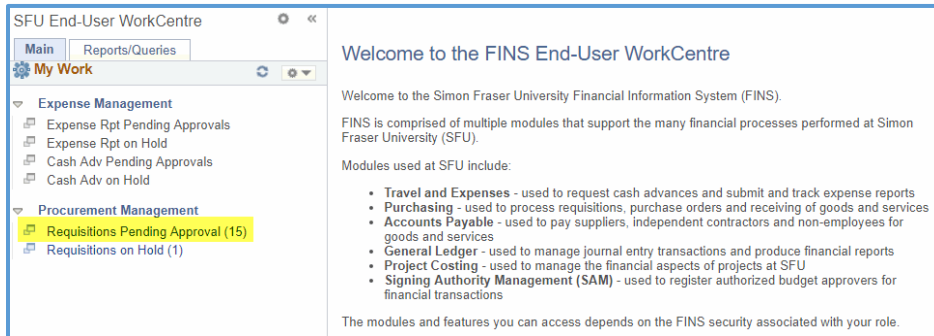
STEP 1

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**

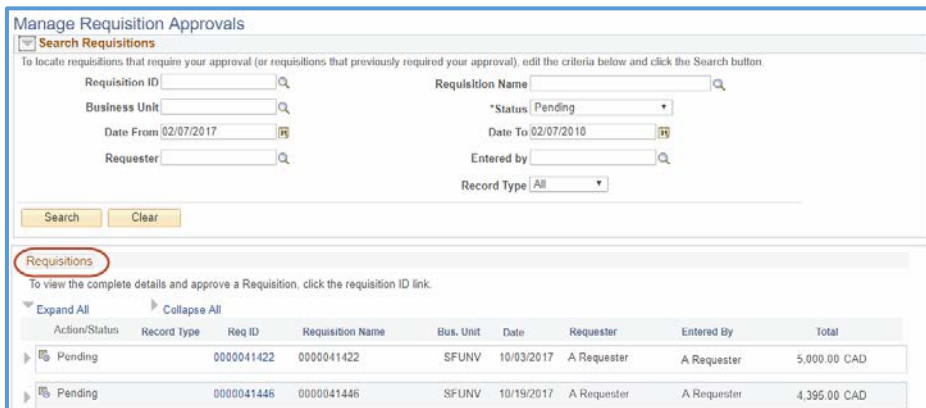


3. Select: **Requisitions Pending Approval**

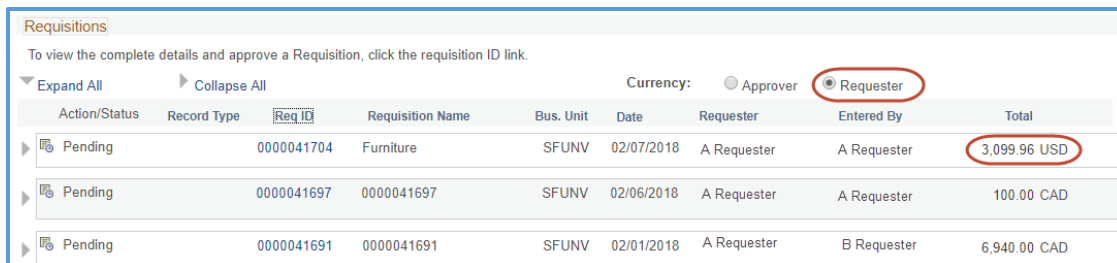


STEP 2

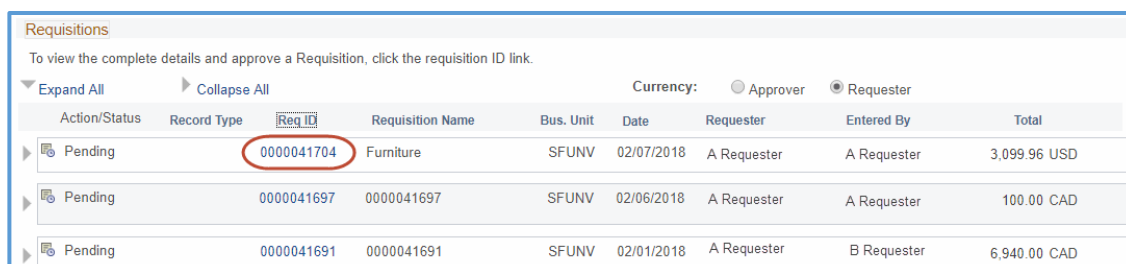
1. From **Manage Requisition Approvals**, navigate to the **Requisitions** Section



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

- 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:** Click the link to view the line-level Chartfield (Chart of Accounts) summary page
- e. **Budget Approver Summary Page:** Click the drop down box and select an Approver to view the lines they can approve.

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

- 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:

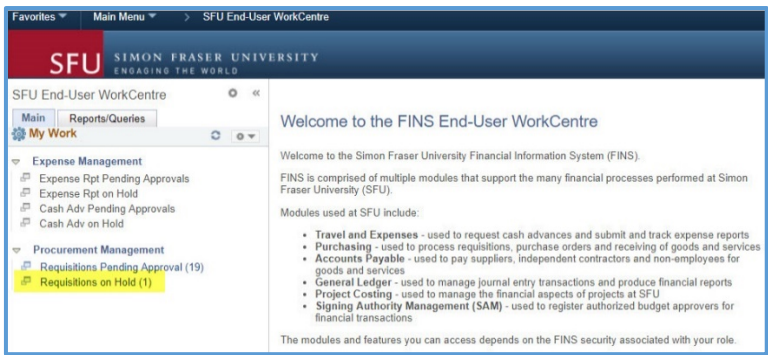
- **Approve** – Approves any selected line(s) and moves the Requisition to the Budget Approver stage
- **Deny** – The deny button rejects any selected lines. It should only be used when the item is no longer required.
WARNING: When the Deny button is actioned, no further adjustments can be made. The 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.

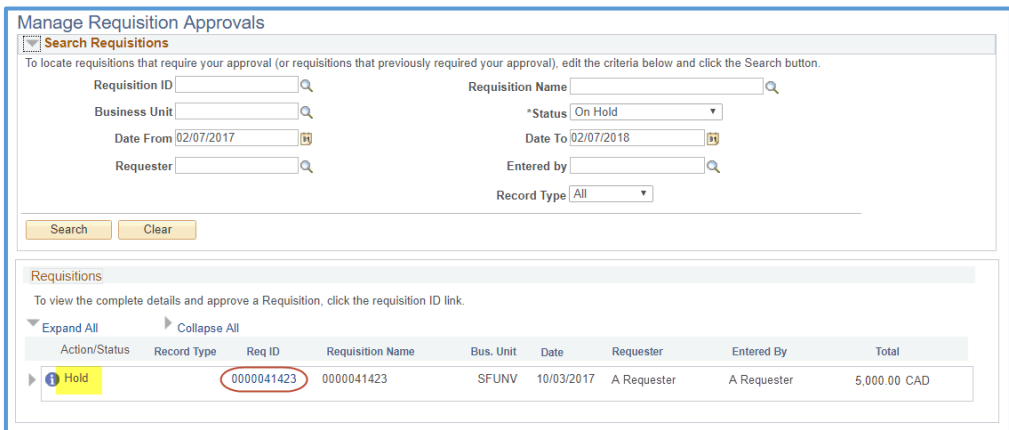
B. TO ACTION REQUISITIONS PREVIOUSLY PLACED ON HOLD

From the **SFU End-User WorkCentre**:

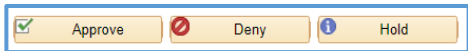
1. Navigate to **My Work - Procurement Management**
2. Select: **Requisitions on Hold**



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.

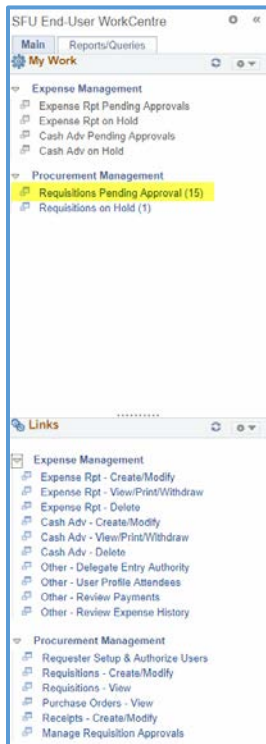
*For more information on reviewing requisition details, see [Page 2, Section 4 - Review the Requisition Approval page](#).

C. ACCESSING PREVIOUSLY APPROVED/DENIED REQUISITIONS

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

From the SFU End-User WorkCentre:

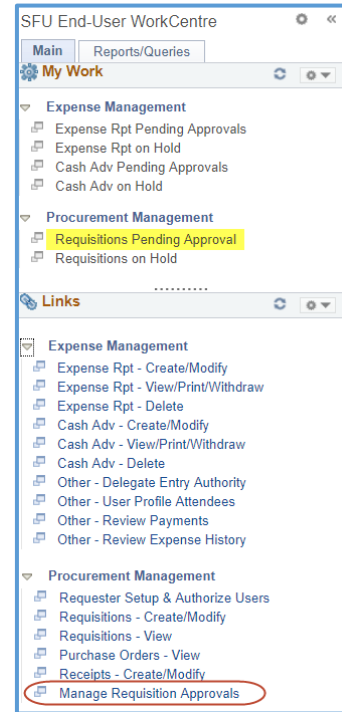
Navigate to **My Work - Procurement Management**
Select: **Requisitions Pending Approval**



Option 2 – If there are NO requisitions Pending Approval:

From the SFU End-User WorkCentre:

Navigate to **Links – Procurement Management**
Select: **Manage Requisition Approvals**



For Options 1 and 2:

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

Click Search

The screenshot shows the 'Manage Requisition Approvals' search form. The 'Status' dropdown menu is open, showing options: Pending, Approved, Denied, On Hold, Pending, and Pushed back. The 'Approved' option is selected. The 'Search' button is circled in red.

- b. The system will display Approved status requisitions.

Action/Status	Record Type	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Approved		0000041696	0000041696	SFUNV	02/06/2018	A Requester	A Requester	100.00 CAD
Approved		0000041693	0000041693	SFUNV	02/01/2018	A Requester	B Requester	5,500.00 CAD
Approved		0000041690	Office Equipment	SFUNV	01/29/2018	A Requester	A Requester	399.90 CAD

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