

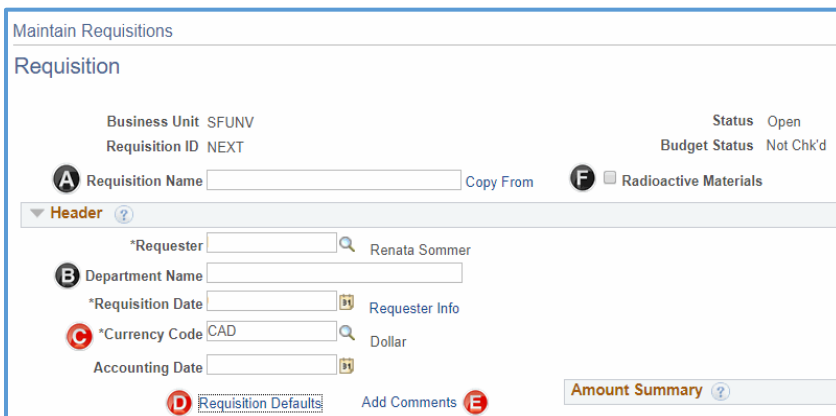
## A. Navigate to Add/Update Requisitions

1. Go to [fins.sfu.ca](https://fins.sfu.ca) and login (sfu UserID and password)
2. Navigate to the SFU End-User WorkCentre – Links - Procurement Management - Requisitions Create/Modify OR From the Main Menu tab – SFU – Purchasing - Online Access – Add/Update Requisitions

## B. Creating a Requisition

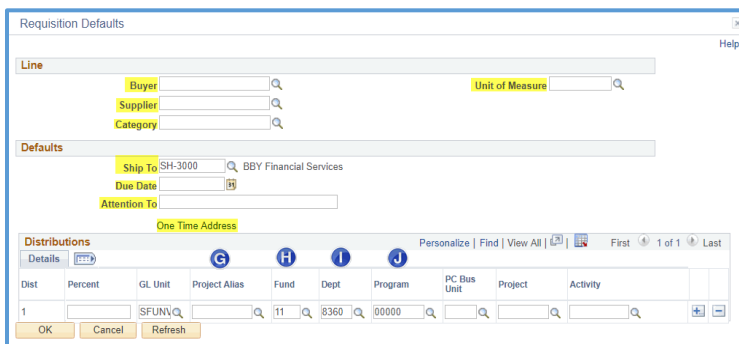
### STEP 1

1. From the Add a New Value tab, select the **Add** Button.
2. Enter the following header information:



- a. **Requisition Name:** Reference details for this Requisition.
- b. **Department Name:** Requester's department.
- c. **\*Currency Code:** Default is **CAD**. Click on magnifying glass to change currency.
- d. **\*Requisition Defaults:** See below.
- e. **Add comments:** Optional.
- f. **Radioactive Materials:** Check the radioactive materials box for the purchase of radioactive goods (i.e., isotopes).

**\*Requisition Defaults:** To update default information:



- g. **Project** (optional): add the project number in the Project Alias field and press the keyboard's Tab key. The full string will auto-populate.
- h. **Fund**
- i. **Department**
- j. **Program**

**Optional Default fields:** Buyer, Supplier, Category, Unit of Measure, Ship To, Due Date, One Time Address, and Attention To.

**STEP 2**

1. Enter the **Line Details** for each requested item:

Line	*Description <sup>A</sup>	Supplier's Catalog <sup>B</sup>	*Category <sup>C</sup>	*Quantity <sup>D</sup>	*UOM <sup>E</sup>	Price <sup>F</sup>
1				0.0000		0

- \*Description:** Add a product description. To add more details, click on the arrow to expand the field.
- Supplier's Catalog:** (Optional) Enter the supplier's part number or product ID.
- \*Category:** Click on magnifying glass to select from the list of available categories.
- \*Quantity:** Enter the required quantity.
- \*UOM** (Unit of Measure): Enter or click on magnifying glass to view list. EA (each) is the most commonly used UOM.
- Price:** Enter the per item price.

Amount	Status	<sup>G</sup>	<sup>L</sup>	Due Date <sup>H</sup>	Ship To <sup>I</sup>	Supplier <sup>J</sup>	Supplier Name	<sup>K</sup>
0.00	Open				SH-3000			+ -

- Comment:** Add a comment and/or attached a vendor quote.
- Due Date:** Enter date to receive goods or complete the service.
- Ship To:** Change if default location is a different location.
- Supplier:** Leave blank or click on the magnifying glass to search for suppliers.
- To add or remove additional lines, click the **+ or -** icon
- Split Cost Between Multiple GL Accounts:** Optional.

**How to instructions:**

1. Add an **approval justification, supplier comments, or uploading a quote:**

- Justification details or supplier instructions are added in the free-form text box.
- To add an explanation or justification for Research Accounting or the Approver, select **Approval Justification**.
- To add additional information or a new comment, click the **+** icon.
- Check **Send to Supplier** to have supplier instructions appear on the Requisition and PO documents.
- To attach a quote or supporting documentation already saved on your computer, click **Attach**.
- Select the file from the saved location and click **Upload**.
- To View/Delete the uploaded documentation, click **View** or **Delete**. The attachment reference is located to the left of the action buttons.
- When all instructions and information has been added, click **OK** to return to the Requisition.

2. **Split Cost Between Multiple GL Accounts:** Optional.

At the line level, select the **distributions** tab.

Line	*Description	Supplier's Catalog	*Category	*Quantity	*UOM	Price	Amount	Status	Due Date
1	Filing Cabinets	XXDD-2	OFFICE_SUPP	2.0000	EA	599.99000	1,199.98	Open	

- Select the **+** icon to add a single or multiple splits.
- Update the accounting string by:
  - entering the **Project number** in the Project Alias field and clicking the keyboard's Tab key; or
  - by entering the Fund, Department, and Program number.
- Split lines by **percent** or **quantity**.
- Select **Refresh** and **OK** to return to the main menu.

Distrib	Status	Percent	Quantity	Amount	GL Unit	Project Alias	Object	Fund	Dept	Program	PC Bus Unit	Project	Activity
1	Open	50.0000	2.0000	50.00	SFUN\Q		6530	11	1234	00000			
2	Open	50.0000	2.0000	50.00	SFUN\Q		6530	11	5678	00000			

## STEP 3

1. **Save for Later:** Select save for later if your requisition is incomplete or if you receive a **Chartfield** error (GL/Account Code) message and you require Procurement's assistance.

Business Unit: SFUNV  
 Requisition ID: 0000044140  
 Requisition Name: 0000044140  
 Status: Open  
 Budget Status: Not Chk'd  
 Radioactive Materials:

Header  
 \*Requester: [Search]  
 Department Name: [Search]  
 \*Requisition Date: 01/07/2018  
 \*Currency Code: CAD  
 Accounting Date: 01/07/2018

Amount Summary  
 Total Amount: 1,199.98 CAD

Line	Description	Supplier's Catalog	Category	Quantity	UOM	Price	Amount	Status
1	Filing Cabinets	XXDD-2	OFFICE_SUPP	2.0000	EA	599.99000	1,199.98	Open

Buttons: Save and Submit, Save for Later

Message  
 Please Correct the ChartField Combination error on line 1 (20000,446)  
 OK

A requisition number will be auto-generated but the requisition will remain in **OPEN** status. Requisitions **do not** enter workflow until the status moves to **Pending** status (see Step 2).

2. **\*Save and Submit:** Saves the requisition, moves it to **PENDING** Status, and initiates the workflow approval process.

**\*\*Workflow approval routing will not initiate until the requisition is in Pending Status.\*\***

Business Unit: SFUNV  
 Requisition ID: 0000044140  
 Requisition Name: 0000044140  
 Status: Pending  
 Budget Status: Not Chk'd  
 Radioactive Materials:

Header  
 \*Requester: RSOMMER  
 Department Name: [Search]  
 \*Requisition Date: 01/07/2018  
 \*Currency Code: CAD  
 Accounting Date: 01/07/2018

Amount Summary  
 Total Amount: 1,199.98 CAD

Line	Description	Supplier's Catalog	Category	Quantity	UOM	Price	Amount	Status
1	Filing Cabinets	XXDD-2	OFFICE_SUPP	2.0000	EA	599.99000	1,199.98	Pending

Buttons: Save and Submit, Save for Later

## C. Viewing Approval Status

- a. From the **Maintain Requisitions** page, select **View Approvals**.

In this example, the Reviewer step is complete and workflow has automatically routed to the **Budget Approver** for their review and approval. For multiple approvers, (as noted in the Procurement Compliance step), select the Multiple Approvers link to view the list of qualified approvers.

Line 1: Paper  
 Category: OFFICE\_SUPP  
 Buttons: View Printable Version, View Approvals, Save and Submit, Save for Later

View Approvals  
 Business Unit: SFUNV  
 Requisition ID: 0000041690  
 Requisition Name: Office Equipment  
 Requested For: [Search]  
 Status: Pending  
 Budget Status: Not Checked  
 Number of Lines: 1  
 Total Amount: 399.90 CAD

**Department Review**  
 Line 1 - Office Chairs: Pending  
 Dept ID: 1234 | Program: 00000  
 Approved  
 Requisition Dept Reviewers: 08/02/2017 - 11:30 AM  
 Comments

**Budget Approval**  
 Line 1 - Office Chairs: Pending  
 Fund Code: 11 | Dept ID: 1234 | Program: 00000  
 Pending  
 Requisition Budget Approvers: [Search]  
 Comments

**Procurement Compliance**  
 Line 1 - Office Chairs: Pending  
 Procurement Compliance  
 Not Routed  
 Multiple Approvers  
 Procurement Approver  
 Comments  
 Apply Approval Changes

Return

## 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](mailto:procurement@sfu.ca)