SFU PROCUREMENT SERVICES

Completing a Requisition for Workflow
Quick Reference Guide
Version Dated: January, 2018

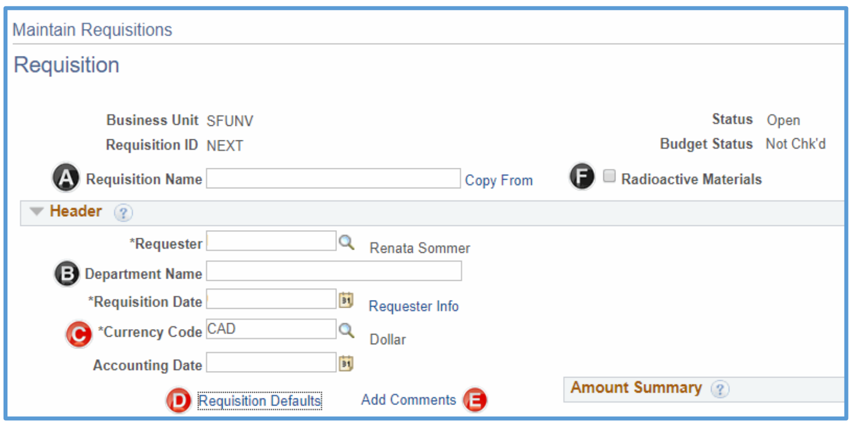
A. Navigate to Add/Update Requisitions

1. Go to 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.

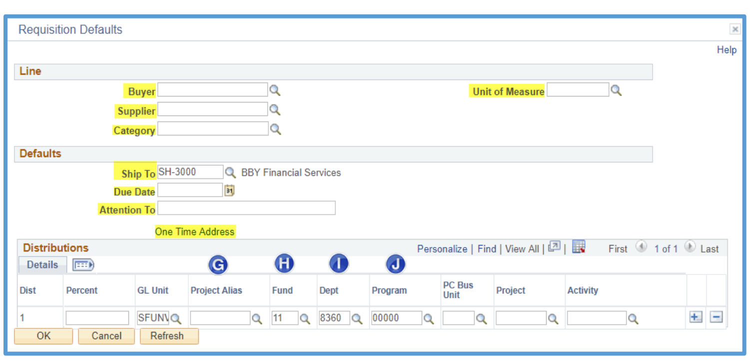
c. ***Currency Code: Default is CAD.** Click on magnifying glass to change currency.

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:

a. ***Description:*** Add a product description. To add more details, click on the arrow to expand the field.

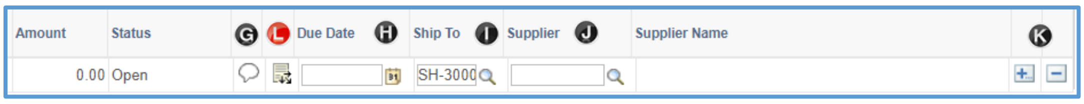
b. **Supplier's Catalog:** (Optional) Enter the supplier's part number or product ID.

c. ***Category:*** Click on magnifying glass to select from the list of available categories.

d. ***Quantity:*** Enter the required quantity.

e. ***UOM*** (Unit of Measure): Enter or click on magnifying glass to view list. EA (each) is the most commonly used UOM.

f. **Price:** Enter the per item price.



g. **Comment:** Add a comment and/or attached a vendor quote.

h. **Due Date:** Enter date to receive goods or complete the service.

i. **Ship To:** Change if default location is a different location.

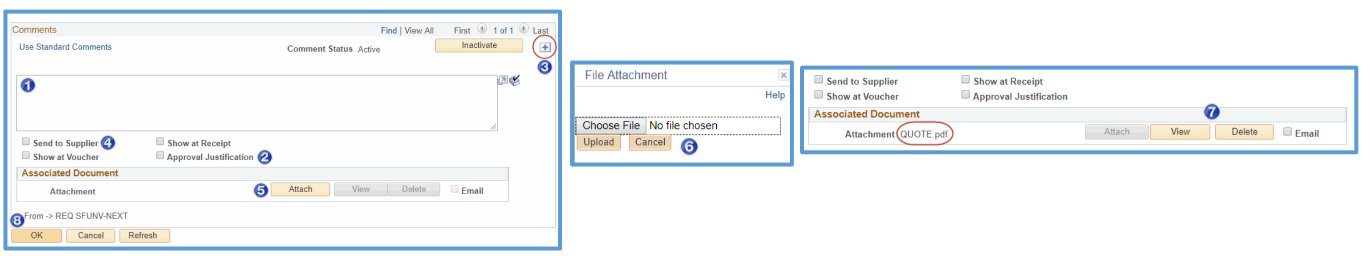
j. **Supplier:** Leave blank or click on the magnifying glass to search for suppliers.

k. To add or remove additional lines, click the **+ or –** icon

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

<u>How to instructions:</u>

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



a. Justification details or supplier instructions are added in the free-form text box.

b. To add an explanation or justification for Research Accounting or the Approver, select **Approval Justification**.

c. To add additional information or a new comment, click the **+** icon.

d. Check **Send to Supplier** to have supplier instructions appear on the Requisition and PO documents.

e. To attach a quote or supporting documentation already saved on your computer, click **Attach**.

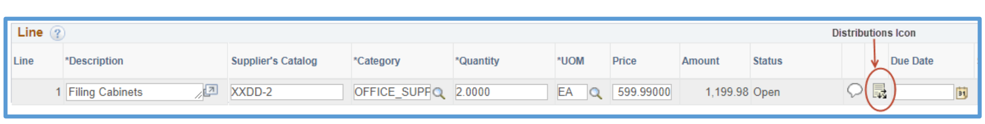
f. Select the file from the saved location and click **Upload**.

g. To View/Delete the uploaded documentation, click **View** or **Delete**. The attachment reference is located to the left of the action buttons.

h. 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.



a. Select the **+** icon to add a single or multiple splits.

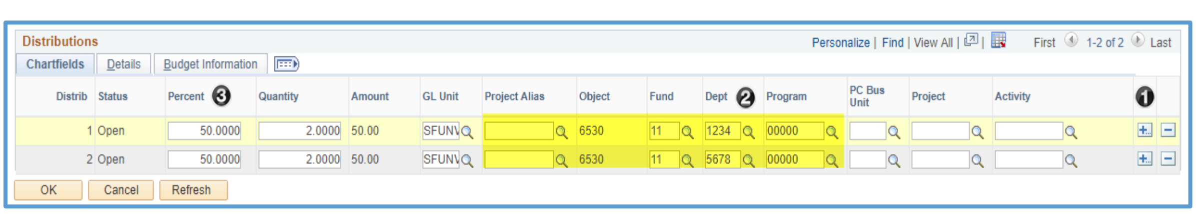
b. Update the accounting string by:

i. entering the **Project number** in the Project Alias field and clicking the keyboard's Tab key; or

ii. by entering the Fund, Department, and Program number.

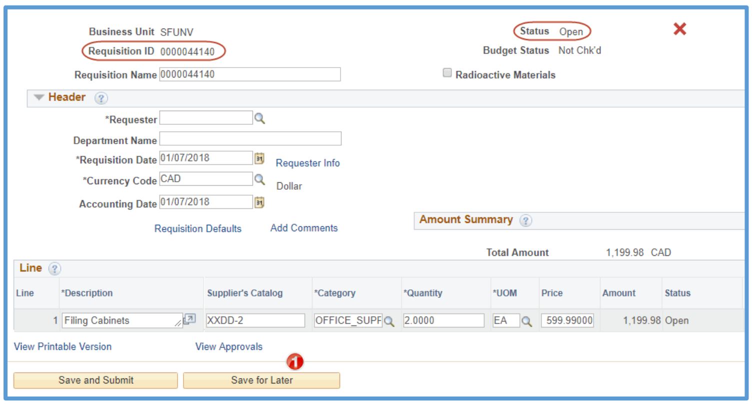
c. Split lines by **percent** or **quantity.**

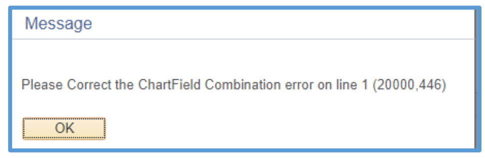
d. Select **Refresh** and **OK** to return to the main menu.



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.

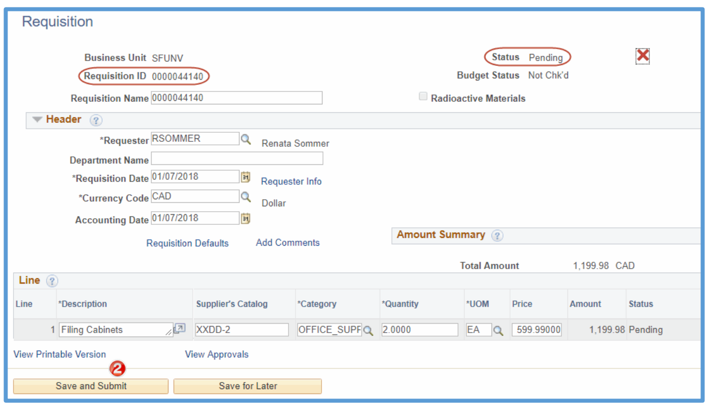




A requisition number will be auto-generated but the requisition will remain in **OPEN** status. Requisitions **do not** enter workflow until the status moves to **Pending** status (see Step 2).

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

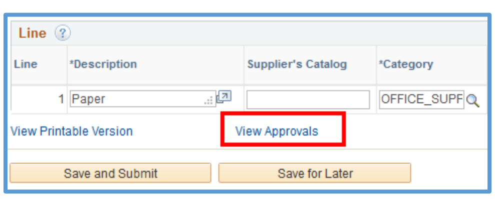
Workflow approval routing will **not initiate until the requisition is in **Pending Status**.**

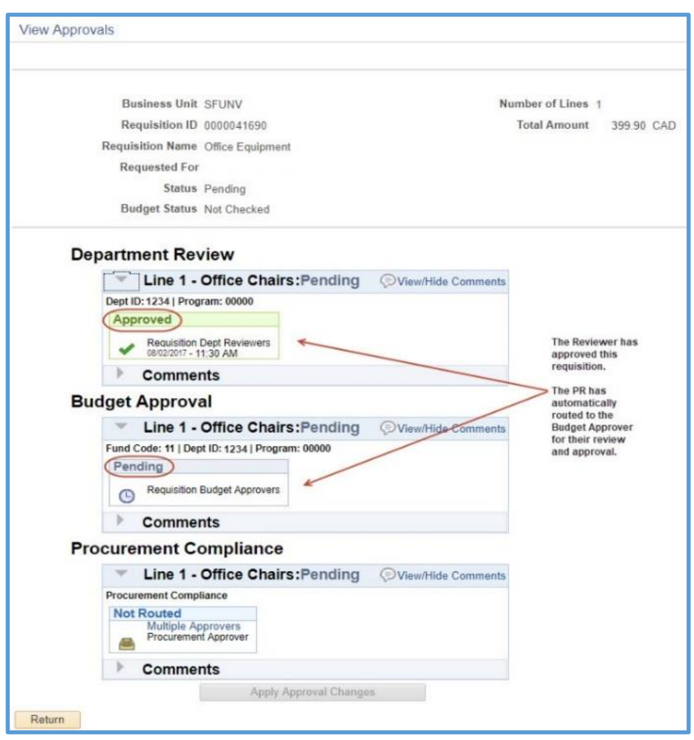


C. Viewing Approval Status

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.





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