

Web Requisition Process

Create a Web Requisition

Log onto FAST

Click on **Requisitions** tab and then **New Requisitions**

ORIGINATOR: Leave blank, this auto fills with your id

REFERENCE: Leave blank, this auto fills with the last person to handle the Web Req.

TELEPHONE: Enter in area code, phone number

EXT: Enter your extension

SHIP TO: Click the drop down area to select the ship to address.

BUILDING/ROOM: Enter room # where goods are to be delivered. ex. WH222

ATTACHMENTS: Click for check mark if there are attachments

QUOTE: Click for check mark if a quote is attached

SELECTED VENDOR: Click the magnifying glass to search for a vendor, (search by entering % then the first letter in upper case) if vendor is not found then manually enter the name.

COMMENTS: This field is optional. All comments written here will appear on the PO.

DATE REQUIRED: Enter date the PO or item(s) is required

CHART: Leave as is.

Click **Create Requisition** and WR # will be auto generated.

Requisition | FAST Single Sign On Suite - Windows Internet Explorer

File Edit View Favorites Tools Help

Convert Select

Favorites Banner BMO details Online Google FAST Single Sign On Suite

Requisition | FAST Sing... details Online links

THOMPSON RIVERS UNIVERSITY

Version: 3.6.1.353 Environment: BANPROD

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Logout

Web Requisitioning ▶ Requisition Edit Page ▶ Create new and edit existing requisitions. (Data as of 14/02/2014 12:30:22 PM)

Requisition

Originator	Reference	Telephone	Ext.	Ship To	Building/Room	Attachments	Quote	Selected Vendor
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	TRU - Warehouse <input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Comments Date Required Chart

Millennium

FAST administration support tool

Local intranet | Protected Mode: Off

125%

Adding Commodity Items

COMMODITY: If you know the commodity number then you can add it here, otherwise leave it blank and your completed requisition will be sent to the general Purchasing queue.

DESCRIPTION: Type a detailed description of the item or services being ordered

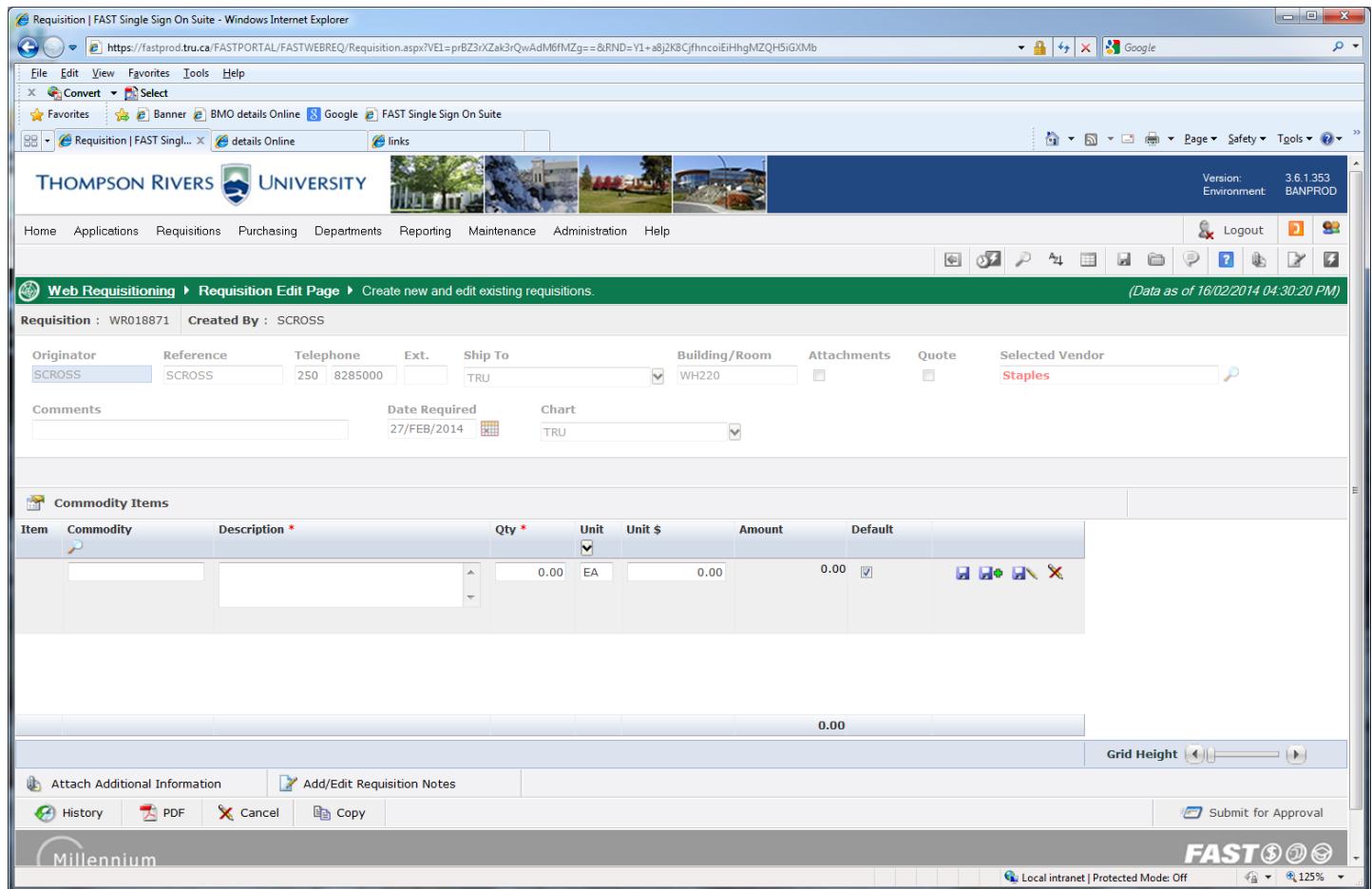
QTY: Enter quantity

UNIT: Make sure EA is selected

UNIT \$: Enter the cost per unit and the Amount will auto populate

DEFAULT: Click to check the default box if all line items will have the same accounting code

Click the Save icon  if you have only one item or  if you are entering multiple items



The screenshot shows the FAST Single Sign On Suite Requisition Edit Page. At the top, there's a navigation bar with links for Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, and Help. Below the navigation is a toolbar with various icons. The main content area has a green header bar with the text "Web Requisitioning > Requisition Edit Page > Create new and edit existing requisitions" and "(Data as of 16/02/2014 04:30:20 PM)". The main form includes fields for Originator (SCROSS), Reference (SCROSS), Telephone (250 8285000), Ext., Ship To (TRU), Building/Room (WH220), Attachments, Quote, and Selected Vendor (Staples). Below these are fields for Comments, Date Required (27/FEB/2014), and Chart (TRU). A large table titled "Commodity Items" is shown, with columns for Item, Commodity, Description*, Qty*, Unit, Unit \$, Amount, and Default. One row is visible in the table with values: Qty* 0.00, Unit EA, Unit \$ 0.00, Amount 0.00, and Default checked. At the bottom of the page are buttons for Attach Additional Information, Add/Edit Requisition Notes, History, PDF, Cancel, Copy, and Submit for Approval. The Millennium logo is at the bottom left, and the FAST logo is at the bottom right. The status bar at the bottom indicates Local intranet | Protected Mode: Off and a zoom level of 125%.

Adding Accounting Items

Click Add Accounting Item

1

Requisition | FAST Single Sign On Suite - Windows Internet Explorer
https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/Requisition.aspx?EI=prBZ3rXZak3QwAdM6fMZg=&RND=Y1+a8jZK8CJfhncoElHhgMZQH5iGXMb

Requisition : WR018871 Created By : SCROSS

Comments Date Required Chart
27/FEB/2014 TRU

Commodity Items

Item	Commodity	Description	Qty	Unit	Unit \$	Amount	Default
1	800	PSA'S :: XADV 2200 Climbing Gym Instructor Level I Apr 1/14 - Apr 5/14	1.00	EA	4,000.00	4,000.00	✓

Save Requisition Add Commodity Item

Accounting Items

Accounting Detail for Commodity Item 1

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
								4,000.00

Add Accounting Item

Requisition | FAST Single Sign On Suite - Windows Internet Explorer
https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/Requisition.aspx?EI=prBZ3rXZak3QwAdM6fMZg=&RND=Y1+a8jZK8CJfhncoElHhgMZQH5iGXMb

Requisition : WR018871 Created By : SCROSS

Comments Date Required Chart
27/FEB/2014 TRU

Commodity Items

Item	Commodity	Description	Qty	Unit	Unit \$	Amount	Default
1	800	PSA'S :: XADV 2200 Climbing Gym Instructor Level I Apr 1/14 - Apr 5/14	1.00	EA	4,000.00	4,000.00	✓

Grid Height (4) ↕

Accounting Items

Accounting Detail for Commodity Item 1

Line	Index	Fund *	Orgn *	Acct *	Prog *	Actv	Locn	Amount
								4,000.00

0.00

Done Local intranet | Protected Mode: Off 100%

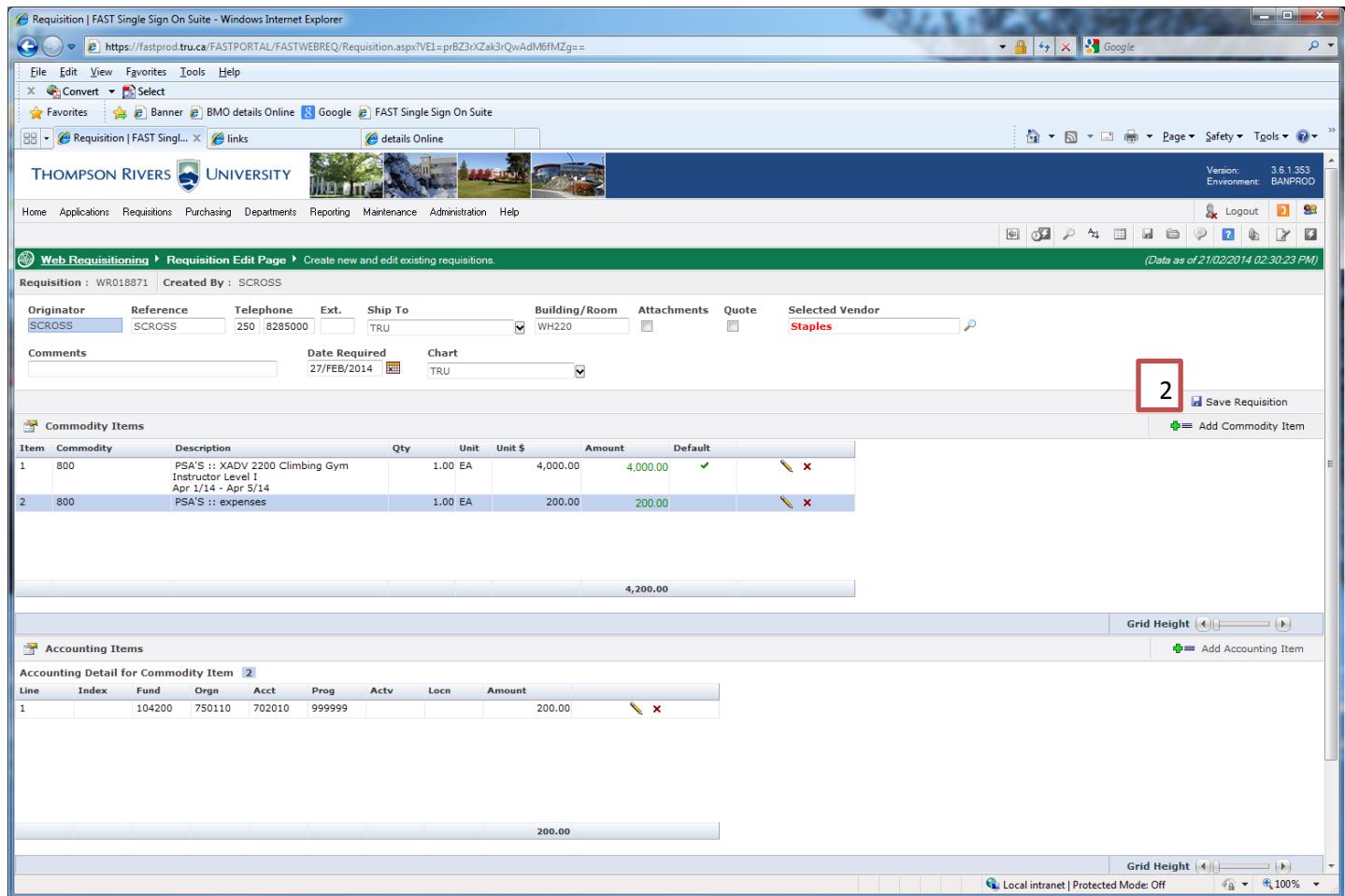
Adding Accounting Items cont'd

Enter the **FUND, ORGN, ACCT, PROG** and **Activity** (Optional) and click save 

If multiple commodity items have been entered and each commodity item has different coding,

- Click on the green or red total in the amount column of the first line item to be changed, this will open up the corresponding accounting line item.
- Click on the pencil of the accounting item to edit.
- Change the coding and press save.

When all commodity items and accounting items have been entered click save requisition.  



The screenshot shows the FAST Single Sign On Suite Requisition Edit Page. At the top, there's a header bar with the university logo and navigation links like Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, and Help. Below the header, a banner displays campus photos. The main content area is titled "Web Requisitioning > Requisition Edit Page > Create new and edit existing requisitions". A green bar indicates the requisition number (WR018871) and the user (SCROSS). The page is divided into several sections:

- Requisition Details:** Originator (SCROSS), Reference (SCROSS), Telephone (250 8285000), Ext. (), Ship To (TRU), Building/Room (WH220), Attachments (), Quote (), Selected Vendor (Staples).
- Comments:** A text input field and dropdown menus for Date Required (27/FEB/2014) and Chart (TRU).
- Commodity Items:** A table showing two items:

Item	Commodity	Description	Qty	Unit	Unit \$	Amount	Default
1	800	PSA'S :: XADV 2200 Climbing Gym Instructor Level I Apr 1/14 - Apr 5/14	1.00	EA	4,000.00	4,000.00	✓ (green)
2	800	PSA'S :: expenses	1.00	EA	200.00	200.00	✗ (red)

A summary total of 4,200.00 is shown in a large input field below the table.
- Accounting Items:** A table titled "Accounting Detail for Commodity Item" showing one line:

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
1		104200	750110	702010	999999			200.00

A summary total of 200.00 is shown in a large input field below the table.

Adding Attachments

Click on **Attach Additional Information** to attach quotes, invoices, PSA's or any pertinent information 3

Click   to open the **Add Document** field

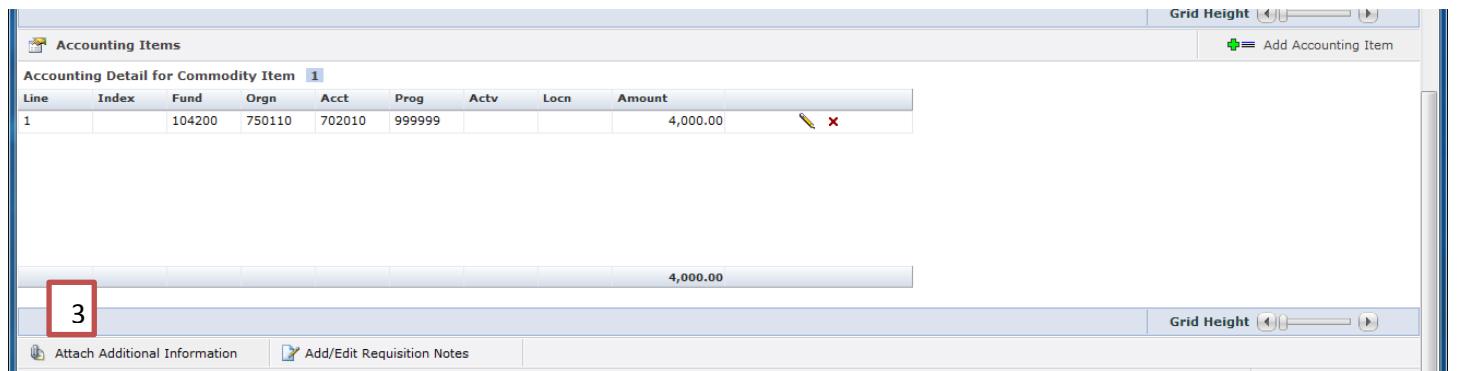
Document Comments: Enter the name of the document or brief explanation

Click **Browse** to locate the document to be attached

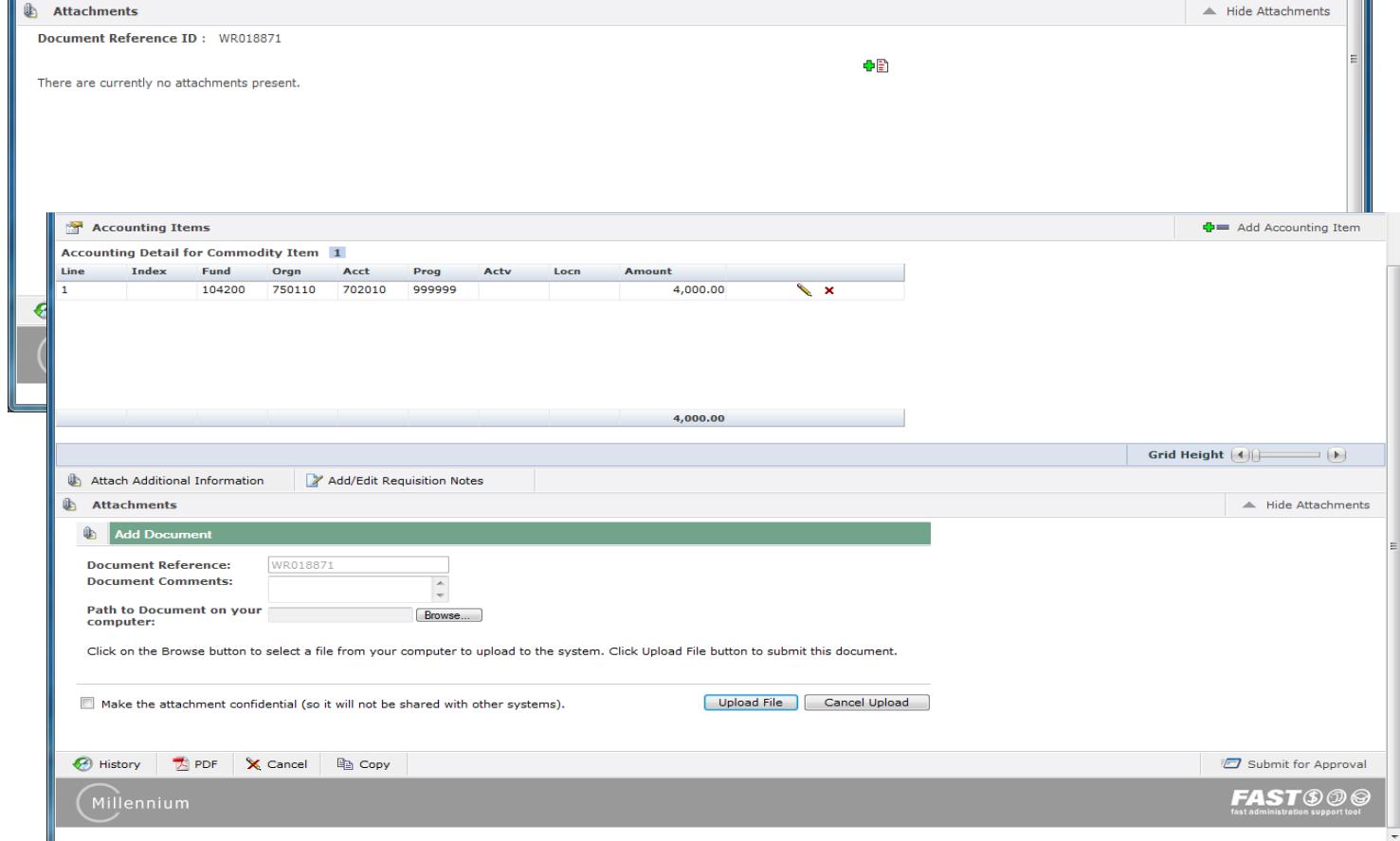
Click **Upload File**

Do this for each document that you wish to attach

Click **Save Requisition**  at the top right, when complete



The screenshot shows the 'Accounting Items' screen. At the top, there is a grid titled 'Accounting Detail for Commodity Item' with one row containing data. Below the grid, there is a large text input field containing '4,000.00'. A red box labeled '3' is positioned to the left of the input field. At the bottom of the screen, there are two tabs: 'Attachments' (selected) and 'Add Document'. The 'Attachments' tab has a message stating 'There are currently no attachments present.' and a 'Grid Height' slider. The 'Add Document' tab is shown in a green bar.



The screenshot shows the 'Add Document' screen. It includes fields for 'Document Reference' (set to 'WR018871'), 'Document Comments' (a dropdown menu), 'Path to Document on your computer:' (a text input field with a 'Browse...' button), and a note: 'Click on the Browse button to select a file from your computer to upload to the system. Click Upload File button to submit this document.' Below these fields are two buttons: 'Upload File' and 'Cancel Upload'. At the bottom, there is a checkbox for 'Make the attachment confidential (so it will not be shared with other systems)' and a note: 'Click on the Browse button to select a file from your computer to upload to the system. Click Upload File button to submit this document.' The bottom navigation bar includes links for History, PDF, Cancel, Copy, Submit for Approval, and FASTO administration support tool. The Millennium logo is also present.

Adding Requisition Notes

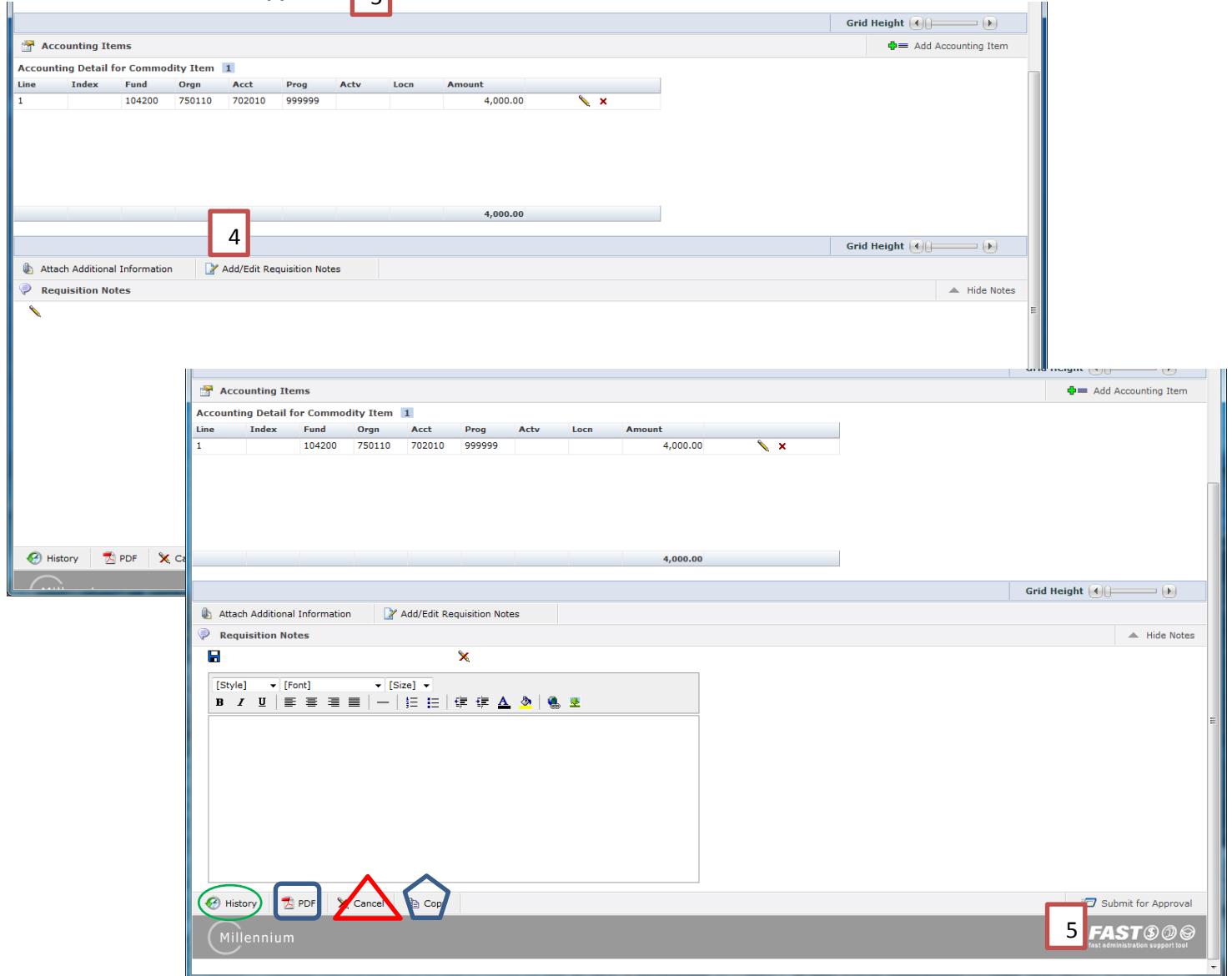
Click on **Add/Edit Requisition Notes** 4

Click on the pencil  to open the field

Click in the field to begin typing. Anything entered here will NOT appear on the PO.

Click the save button  when complete

Click **Submit for Approval** 5



The screenshot shows a requisition details page with a notes section. The notes field contains "4,000.00". A red box labeled "4" is over the notes field. A red box labeled "5" is over the "Submit for Approval" button at the bottom right. Below the main window, there are two smaller windows showing the same interface. At the bottom of the main window, there is a toolbar with icons: History (green circle), PDF (blue square), Cancel (red triangle), Copy (blue pentagon), and Millennium logo. The "History" icon is circled in green. The "Cancel" icon is circled in red.

 **History:** Allows you to see where the Web Req has been

 **PDF:** Enables you to print out the web Req for your files

 **Cancel:** Allows you to cancel the Web Req

 **Copy:** Allows you to copy the Web Req

Note:

- You can cancel any requisition that you create, but you have to cancel it **before** you send it to Purchasing.
- Once the requisition has been submitted for approval, only a member of the Purchasing Dep. can cancel it.

Send for Budgetary Approval

Depending upon the commodity item you will need to send the Web Req for budgetary authorization (PSA's do not need to go for budgetary authorization)

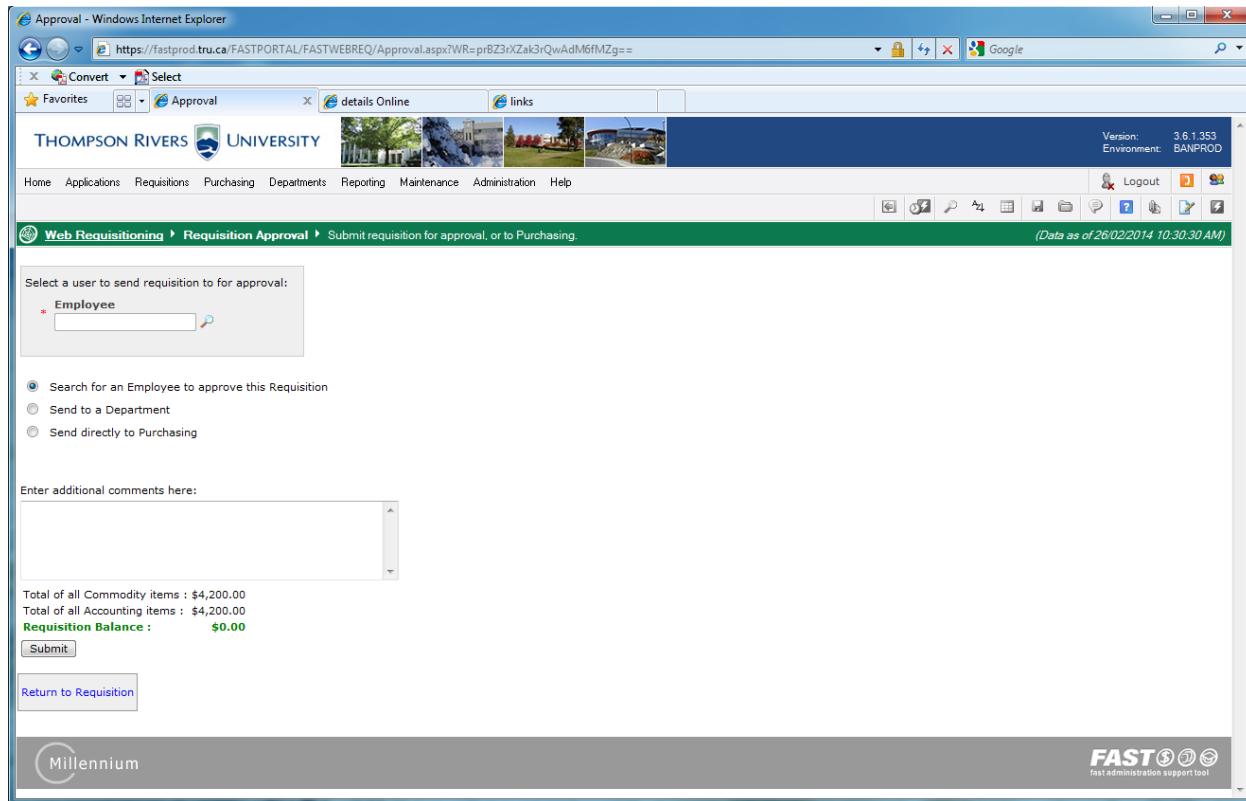
Click  and enter the persons last name and click search

Double click on the correct name OR

Click **Send Directly to Purchasing** if no budgetary authorization is needed

Click in the **Enter Additional Comments Here**, if you would like to send a message to the recipient

Click **Submit**



The screenshot shows a Windows Internet Explorer window titled "Approval - Windows Internet Explorer". The URL in the address bar is <https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/Approval.aspx?WR=prBZ3rxZak3rQwAdM6fMZg==>. The page header includes the university logo, navigation links for Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, Help, and a Logout button. A banner at the top right indicates Version: 3.6.1.353 and Environment: BANPROD. The main content area is titled "Web Requisitioning > Requisition Approval > Submit requisition for approval, or to Purchasing." It displays a form for selecting an approver, with "Employee" selected in a dropdown. Below this are three radio buttons: "Search for an Employee to approve this Requisition" (selected), "Send to a Department", and "Send directly to Purchasing". A text area for "Enter additional comments here:" is present, along with a note about commodity and accounting item totals (\$4,200.00 each) and a balance of \$0.00. A "Submit" button and a "Return to Requisition" link are at the bottom. The footer features the Millennium logo and the FAST logo.

Viewing the Status of a Requisition

NOTE: When you are searching a requisition everything must be in upper case. Use only one filter option for best results.

Click **Requisitions** and **Requisition Status**, you can only view a requisition that you created

Specific Requisitions: If you know the Web Req # you are looking for

Created By: Enter your first initial and last name, no spaces (Best Option)

Suggested Vendor: Enter first part of vendor name, ex: Columbia Transport enter COLUMBIA

And press **Execute Report** 6

The screenshot shows a web browser window for 'Req Status | FAST Single Sign On Suite - Windows Internet Explorer'. The URL is <https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/ReqStatus.aspx?V1=enTelb8QqeX2ogSA4fV7w==>. The page title is 'Req Status | FAST Single Sign On Suite'. The main content area is titled 'Web Requisitioning > Requisition Status > Search for status of requisitions' with a note '(Data as of 03/03/2014 02:30:20 PM)'. The interface includes a navigation bar with links like Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, Help, and a Logout link. Below the navigation is a toolbar with 'Report Options', 'Filter Options', 'Advanced Options', and 'Pinned Reports'. The main search area contains several filter fields: 'Specific Requisition' (Equal), 'Created By' (Equal), 'Approval Queue' (Equal), 'Suggested Vendor' (Equal), 'Posted' (checkbox checked), 'PO' (dropdown), 'Cancelled' (dropdown), 'Required Date' (date picker), 'Activity Date' (date picker), 'CHART' (dropdown set to 1), 'FUND' (dropdown), 'ORGN' (dropdown), 'ACCT' (dropdown), and 'Page Notes' (checkbox). At the bottom right are buttons for 'Clear Filter Options' and 'Execute Report' (highlighted with a red box and the number 6).

Viewing the Status of a Requisition cont'd

Req ID: Click on the WR# to view the Web Req

Notes: Click on the icon to view any notes for the Web Req, red * indicates notes attached

Attach: Click to view all attachments

Required Date: This is the date that was entered when the Web Req was created

Activity Date: This is the date the Web Reg was sent to Purchasing

Created By: Person who created Web Req

Suggested Vendor: Vendor Name

Posted: Verifies Web Req was posted to Banner

PO: Click on the green arrow to view the PO

Cancelled: Shows cancellation reasons if the Web Reg was cancelled

Cancelled By: Shows who cancelled the Web Req

Approval Queue: Shows where the Web Reg is

Copy: click on the page icon to copy the Web Req

Commodity Total: Total value of the PO

File Edit View Favorites Tools Help

Convert Select

Favorites Banner BMO details Online Google FAST Single Sign On Suite

Req Status | FAST Single details Online Links MSN Canada - Outlook.co

THOMPSON RIVERS UNIVERSITY Version: 3.6.1.353 Environment: BANPROD

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Web Requisitioning > Requisition Status > Search for status of requisitions (Data as of 03/03/2014 02:30:20 PM) ▾

Report Options

Grid Graph

Row #	Req ID	Notes	Attach	Required Date	Activity Date	Created By	Suggested Vendor	Posted	PO	Cancelled	Cancelled By	Approval Queue	Copy	Commodity Total
1	WR017947	•	•	01/11/2013	30/10/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$2,574.00
2	WR017929	•	•	28/10/2013	25/10/2013	DTURNBULL	Columbia Shuswap Regional District			Wrong Vendor	HHAMILTON	HHAMILTON		\$3,773.25
3	WR017548	•	•	23/09/2013	20/09/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$2,574.00
4	WR017080	•	•	25/07/2013	23/07/2013	HHAMILTON	Columbia Transport Training Ltd						✉	\$0.00
5	WR017079	•	•	31/07/2013	25/07/2013	HHAMILTON	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$2,340.00
6	WR016733	•	•	24/06/2013	17/06/2013	SCROSS	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$5,359,640.95
7	WR016330	•	•	24/05/2013	09/05/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$2,691.00
8	WR015429	•	•	14/02/2013	12/02/2013	DTURNBULL	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$2,576.00
9	WR015272	•	•	28/02/2013	26/02/2013	GWEREMCZUK	Columbia Valve & Fitting Ltd.			Paid by P-Card	ALAFRANCE	PURCHASING		\$45.70
10	WR014886	•	•	27/12/2012	21/12/2012	HHAMILTON	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$5,600,000.00
11	WR014538	•	•	17/11/2012	14/11/2012	HHAMILTON	Columbia Transport Training Ltd	✓	✓		PURCHASING		✉	\$168,000.00
12	WR014532	•	•	11/11/2012	01/11/2012	SCROSS	Columbia Transport Training Ltd	✓			PURCHASING		✉	\$5,600,000.00
13	WR014048	•	•	15/09/2012	11/09/2012	HHAMILTON	Columbia Transport Training Ltd	✓			PURCHASING		✉	\$32,256.00
						Columbia Transport								\$18,376,235.62

H ← 1 - 33 of 33 → H

Grid Height 4 Records per Page 500

Save as Pinned Report

Local intranet | Protected Mode: Off 125% XML