



**THOMPSON
RIVERS
UNIVERSITY**

Procurement
Services

FAST

Web Requisition for PSA's

User Manual

PSA PROCESS

LOGGING INTO FAST WEB REQUISITION

- ❖ Log into the Web Requisitions module through truemployee.tru.ca.
- ❖ Click on **FAST Suite** under **Resources**.

The screenshot shows the truemployee.tru.ca website. The main content area is divided into three columns: Employment Details, Time Reporting/Approval, and TRU Alert System. Below these is the Personal Information section, followed by the Resources section. In the Resources section, the link 'FAST Suite' is circled in red. Other links in Resources include 'Working Alone/ After Hours Reporting', 'TRU Outlook Email', and 'Visit OneTRU for all other staff resources'. The footer of the page features the Thompson Rivers University logo and navigation links for 'More Information' and 'TRU Go'.

- ❖ Click on the Web Requisitions icon on the left side.

The screenshot shows the FAST web portal interface. The top navigation bar includes the Thompson Rivers University logo, a search bar, and user information (Susanne Cross) with a Logout button. A left-hand navigation menu is visible, with the 'Web Requisitions' icon (a green circle with a white document icon) circled in red. The main content area features a large image of a building and a text block stating: 'In FAST version 4.2 Millennium is pleased to unveil a brand new data entry grid. You can now quickly and easily edit as many cells as you want inline just like Excel. You will notice many improvements to reporting pages including a new data control, improved page functionality and report options, pinned report updates and faster report exporting.' Below this is a message: 'If you can only see Home and Help menu items then your login ID is restricted and access has not been granted.' At the bottom, there is a 'NOTIFICATIONS' section with the text: 'Find out what is new in FAST Click Here', 'You have 0 requisitions waiting for your approval.', and 'You have 0 requisitions in progress.'

❖ Click on **“Requisitions”** and select **“New PSA”**

The screenshot shows a web browser window displaying the Thompson Rivers University FAST Portal. The browser's address bar shows the URL: <https://fastprod.tru.ca/FASTPORTAL/FASTBUILDER/Home.aspx?SCHEMA=mTOcgsR8p/q/OQZoaq/nC==&PAGENAME=d9Pv5M/alg=>. The page header includes the university logo and navigation tabs: Requisitions, Purchasing, Departments, Reporting, Maintenance, Administration, and Help. A user profile for Susanne Cross is visible in the top right, along with a Logout button. A green banner at the top right indicates the data is as of 23/03/2018 04:30:58 PM. On the left, a vertical sidebar contains various icons. The 'Requisitions' menu is open, showing options: New Requisition, New PSA (highlighted), Open, Requisition Status, and Cancel. On the right side of the page, there are two dropdown menus: 'WebReq Links' and 'News'.

CREATING A PSA

1. Enter your phone #, the ext. is not necessary. You can tab or use your mouse to move from field to field.
2. In the Building/Room box type **PSA**
3. Click the Attachments box if you are attaching documents
4. Click on the magnifying glass and enter the first name of the company or last name of the person to search, make sure to capitalize the first letter of the name.

If the person/company you are searching for is not found;

- Manually enter the vendor name in **Selected Vendor** and it will print on the PSA.
- Once the PSA is complete and printed you will need to manually write in the address of the vendor under the name. Because this is a contract it must be treated as such and anything hand written on it must be initialed by the vendor and the AVP/VP Representative.

Note: The contract should be in the legal name/payee of the company or person

5. Enter the date PSA is to commence
6. Click on **“Create PSA”**

Note: Anything written in the comments box will appear on the PO which is sent to the vendor.

The screenshot displays the 'PSA Edit Page' in the FAST web requisitioning system. The page includes a navigation menu with options like Home, Applications, Requisitions, Purchasing, Departments, Reporting, Maintenance, and Administration. The main form area is titled 'PSA' and contains several input fields: Originator, Reference, Telephone, Ext., Ship To (set to TRU - Warehouse), Building/Room, Attachments, Quote, and Selected Vendor. A 'Comments' box is located below the Telephone field, and a 'Date Required' field is below the Ext. field. A 'Create PSA' button is positioned at the bottom right of the form. Six red callout boxes with numbers 1 through 6 are overlaid on the page to indicate specific steps: 1 points to the Telephone field, 2 to the Building/Room field, 3 to the Attachments field, 4 to the magnifying glass icon in the Selected Vendor field, 5 to the Date Required field, and 6 to the Create PSA button. The footer of the page features the 'millennium' logo on the left and the 'FAST' logo with the tagline 'fast administration support tool' on the right.

CREATING A PSA cont'd

- ~ **TRU Employee;** if the vendor is a TRU employee, click in this box to place a check mark
- ~ **Vendor Contact Person;** Enter the contact name of the vendor
- ~ **Vendor Phone Number;** Enter the vendor phone #
- ~ **Project Name;** Enter the name of the project or brief description of work to be performed
- ~ **Work Location;** Enter where the work will be completed
- ~ **Start Date;** Enter the start date of the contract
- ~ **End Date;** Enter the end date of the contract
- ~ **Aggregate Total;** Enter the total value of the contract (excluding taxes if applicable)
- ~ **Taxable;** Click on the drop down box and select the tax if applicable
- ~ **Services Description (Part I);** Enter in the complete Services Description. The box will expand as you type. You can copy and paste from a Word document.
- ~ **Fees and Expenses Description (Part II);** Enter in the description of fees and invoicing and any special payment requests such as milestone payments based on achievable tasks. The box will expand as you type. You can copy and paste from a Word document.
- ~ **Dean/Director Recommendation (Budgetary Approval);** Enter the name of the Dean/Director or budget approver, this will appear in the upper right hand of the PSA when it is complete. **Note:** You will need to send the Web Req. to the Dean/Director or budget approver for electronic approval rather than have them sign the hard copy of the contract.
- ~ Click on **Save Commodity**

The screenshot shows the 'PSA Edit Page' in the FAST portal. The 'Commodity Items' section is highlighted with an orange border. It contains the following fields:

- TRU Employee:**
- Vendor Contact Person:**
- Vendor Phone Number:**
- Project Name:**
- Work Location:**
- Start Date:**
- End Date:**
- Aggregate Total:**
- Taxable:**
- Services Description (Part I):**
- Fees and Expenses Description (Part II):**
- Dean/Director Recommendation:**




Buttons at the bottom of the section include 'Attach Additional Information', 'Add/Edit PSA Notes', 'Save PSA', 'Save Commodity', and 'Add Accounting Item' (circled in green). Below this is the 'Accounting Items' section with a table for 'Add Accounting Line Item'.

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
								0.00

At the bottom of the page, there are buttons for 'History', 'PDF', 'Cancel', 'Copy', and 'Submit'. The 'FAST' logo and 'fast administration support tool' are also visible.

- ~ Click **Add Accounting Item**

CREATING A PSA cont'd

- ~ Enter in your financial coding (Fund, Org, Acct etc.), if you have more than one accounting line click on  to save the first line and open a second line, otherwise click on . Only the boxes with the * are mandatory fields.
- Note:** Leave the index box blank
- ~ Click on  **Submit**

fasttest.tru.ca/FASTPORTAL_TEST/FASTWEBREQ/RequisitionPSA.aspx?VE1=gou6NzknQjufWeg6F281Zg==&RND=XpNNMSB8MmfpYzHs6bupN5Q

THOMPSON RIVERS UNIVERSITY Version: 4.2.06 Environment: BANPOST

Susanne Cross Logout

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Web Requisitioning > PSA Edit Page > Create new and edit existing PSA (Data as of 01/05/2014 02:31:02 PM)

PSA : PSA18493 Created By : SCROSS

Originator Reference Telephone Ext. Ship To Building/Room Attachments Quote Selected Vendor
SCROSS SCROSS 250 8285000 5385 TRU [dropdown] [checkbox] [checkbox] Kamloops Art Gallery

Comments Date Required
[text] 15/05/2014 [calendar]

Attach Additional Information Add/Edit PSA Notes

Commodity Items

TRU Employee Vendor Contact Person Vendor Phone Number Project Name Work Location Start Date End Date
[checkbox] Sally Smith 250-888-4444 Provide custom Framing Kamloops 15/05/2014 [calendar] 30/05/2014 [calendar]

Aggregate Total Taxable Services Description (Part I) Fees and Expenses Description (Part II)
5,000.00 HST - FVT Only [dropdown] The vendor will provide custom framing of all classroom art from the class of 2014 Arts. To be paid upon receipt.

Dean/Director Recommendation
Johnny Appleseed

Save Commodity

Accounting Items


Add Accounting Line Item

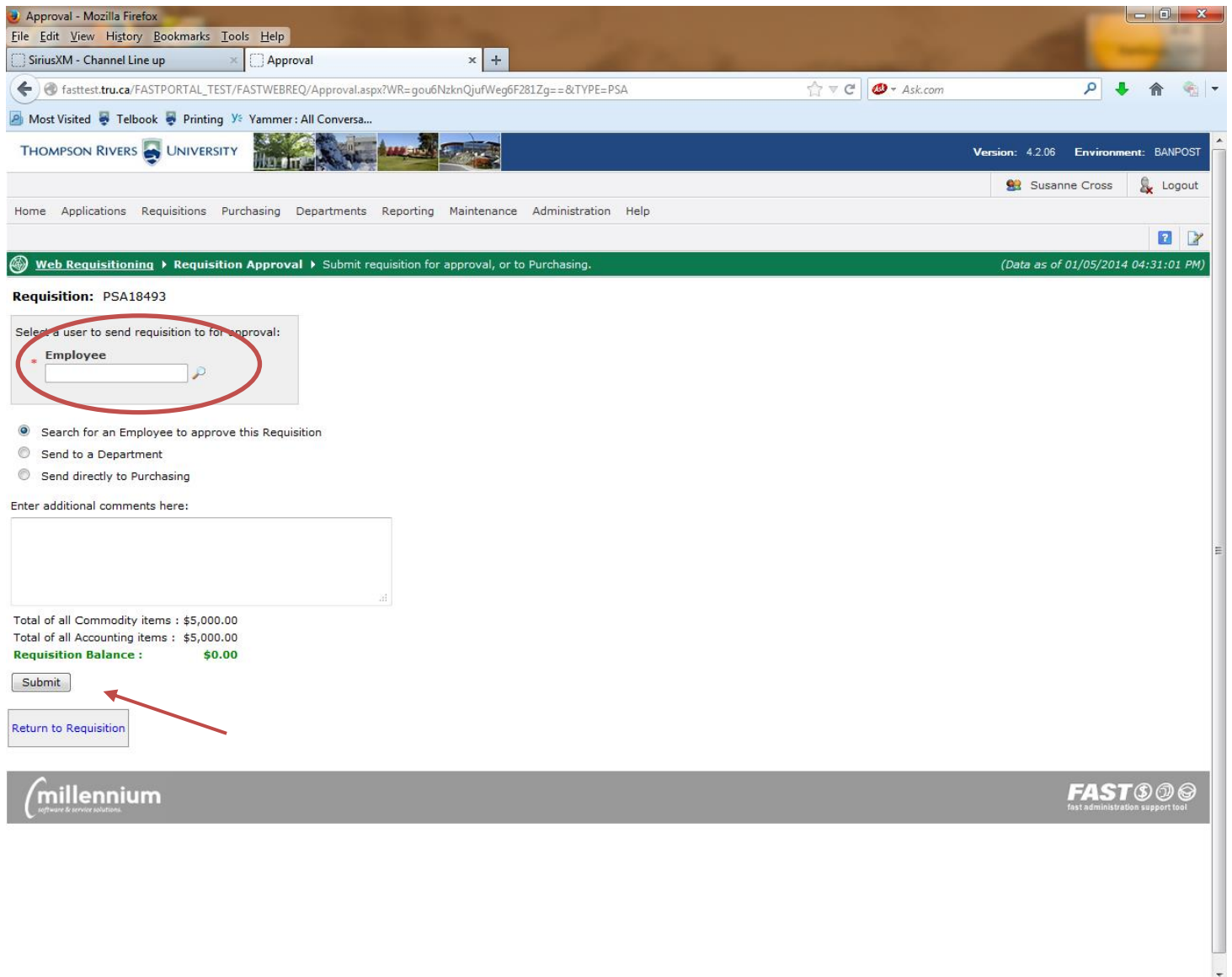
Line	Index	Fund *	Orgn *	Acct *	Prog *	Actv	Locn	Amount	
								5,000.00	[add] [save] [edit] [delete]
								0.00	

History PDF Cancel Copy Submit

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SENDING PSA FOR DEAN/DIRECTOR APPROVAL

- ~ Click on the  by employee and search for the Dean/Director or budget approver by first or last name. **Note:** the Dean/Director will need to approve the web req. only and will not need to sign the PSA.
- ~ Click **Submit**
Note: You will probably need to send an email asking the Dean/Director to return to originator so that you are aware of the approval and can print the PDF for vendor signing.



The screenshot shows a web browser window displaying the 'Approval' page of the FAST system. The browser title is 'Approval - Mozilla Firefox' and the address bar shows the URL: `fasttest.tru.ca/FASTPORTAL_TEST/FASTWEBREQ/Approval.aspx?WR=gou6NzknQjufWeg6F281Zg==&TYPE=PSA`. The page header includes 'THOMPSON RIVERS UNIVERSITY' and 'Version: 4.2.06 Environment: BANPOST'. The user 'Susanne Cross' is logged in, with a 'Logout' link. The navigation menu includes 'Home', 'Applications', 'Requisitions', 'Purchasing', 'Departments', 'Reporting', 'Maintenance', and 'Administration'. The main content area is titled 'Web Requisitioning > Requisition Approval > Submit requisition for approval, or to Purchasing.' (Data as of 01/05/2014 04:31:01 PM). The requisition number is 'PSA18493'. A red circle highlights the 'Employee' search field under the heading 'Select a user to send requisition to for approval:'. Below this are three radio button options: '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. Summary statistics show: 'Total of all Commodity items : \$5,000.00', 'Total of all Accounting items : \$5,000.00', and 'Requisition Balance : \$0.00'. A red arrow points to the 'Submit' button. At the bottom, there is a 'Return to Requisition' link. The footer contains the 'millennium' logo and the 'FAST' logo with the tagline 'fast administration support tool'.

PRINTING PSA

- ~ Once the Web Req. is returned from the Dean/director,
- ~ Click the pdf button  to print the PSA. Check to make sure that the vendor address printed, if not write it under the vendor name before sending it to the vendor for signature and add an initial line.
- ~ Send the complete 3 page PSA to the vendor for signature
- ~ Once the signed PSA is returned from the vendor, scan it and attach it to the web req.
 - Click on **“Attach Additional Information”** 
 - Click on the add item icon 
 - Browse for your scanned file
 - Click in the **“Document Comments”** box write: **“Vendor Signed PSA”**
 - Click **“Upload File”**
- ~ If the vendor answered no to question #3 regarding WCB then send a copy of the PSA to insurance-liability@tru.ca to get WCB exemption.

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Susanne Cross Logout

Web Requisitioning > PSA Edit Page > Create new and edit existing PSA (Data as of 20/05/2014 10:31:19 AM)

PSA : PSA18493 Created By : SCROSS

Originator: SCROSS Reference: SCROSS Telephone: 250 8285000 Ext.: 5385 Ship To: TRU Building/Room: Attachments: Quote: Selected Vendor: Kamloops Art Gallery

Comments: Date Required: 22/05/2014

Attach Additional Information Add/Edit PSA Notes Save PSA

Commodity Items

TRU Employee: Vendor Contact Person: Sally Smith Vendor Phone Number: 250-888-4444 Project Name: Provide custom Framing Work Location: Kamloops Start Date: 15/05/2014 End Date: 30/05/2014



Aggregate Total: 5,000.00 Taxable: HST - FVT Only Services Description (Part I): The vendor will provide custom framing of all classroom art from the class of 2014 Arts. Fees and Expenses Description (Part II): To be paid upon receipt.

Dean/Director Recommendation: Johnny Appleseed

Save Commodity

Accounting Items Add Accounting Item


Add Accounting Line Item

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount	
1		04200	750110	710015	999999			5,000.00	 
								5,000.00	

History PDF Cancel Copy Submit

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AVP/VP APPROVAL

- ~ Print the **Vendor signed PSA**  and send to the appropriate AVP/VP TRU representative to sign at the bottom left. Once signed they will forward to Purchasing for processing.
- ~ Send the web req. to Purchasing for processing

PSA : PSA18493 Created By : SCROSS

Originator SCROSS
 Reference SCROSS
 Telephone 250 8285000
 Ext. 5385
 Ship To TRU
 Building/Room
 Attachments
 Quote
 Selected Vendor Kamloops Art Gallery

Comments
Date Required 22/05/2014

 **Attachments**
 Attach Additional Information
 Add/Edit PSA Notes
 Save PSA
 Hide Attachments

Document Reference ID : PSA18493

Type	File Name	Doc Ref	Comments	Date	Confidential
	Vendor signed PSA.pdf	PSA18493	Vendor signed PSA	20/05/2014	<input checked="" type="checkbox"/>

Commodity Items

TRU Employee
Vendor Contact Person Sally Smith
Vendor Phone Number 250-888-4444
Project Name Provide custom Framing
Work Location Kamloops
Start Date 15/05/2014
End Date 30/05/2014

Aggregate Total 5,000.00
Taxable HST - PVT Only
Services Description (Part I) The vendor will provide custom framing of all classroom art from the class of 2014 Arts.
Fees and Expenses Description (Part II) To be paid upon receipt.

Dean/Director Recommendation
 Johnny Appleseed

Save Commodity

Accounting Items Add Accounting Item

Add Accounting Line Item

Line	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
1		104200	750110	710015	999999			5,000.00
								5,000.00

History PDF Cancel Copy Submit

Tracking or Viewing PSA

A PSA can be viewed, notes can be made and documents attached at any time in the process, it doesn't matter where the electronic PSA/WR is in the system.

Note: A search can be done only by the originator of the PSA.

- ~ Click on **Requisitions**
- ~ Click on **Requisition Status**

The screenshot displays the Thompson Rivers University FASTPORTAL/FASTWEBREQ/Main.aspx interface. The browser address bar shows the URL. The page header includes the university name and version information (Version: 4.2.06, Environment: BANPROD). The user is logged in as Susanne Cross. The 'Requisitions' menu is open, showing options: New Requisition, New PSA, Open, Requisition Status, and Cancel. Red arrows point to the 'Requisitions' menu and the 'Requisition Status' option. The page footer includes the 'millennium' logo and the 'FAST' logo (fast administration support tool). The URL in the address bar is https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/ReqStatus.aspx?VE1=nTeJb18QqEX2oqSA4fW7w==.

- ~ In **Specific Requisition** enter the PSA # using only upper case and no spaces Ex. **PSA20278**, and click **Execute Report**

THOMPSON RIVERS UNIVERSITY

Version: 4.2.06 Environment: BANPROD

Return to Requisition Status (09:07:10 AM) Return to Report

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Web Requisitioning > Requisition Status > Search for status of requisitions (Data as of 25/02/2015 04:31:11 PM)

Filter Options Report Results Help + More

Specific Requisition
Equal PSA20278

Created By []

Approval Queue Equal

Suggested Vendor Equal

Posted []

PO []

Cancelled []

Required Date Equal

Activity Date Equal

FUND []

ORGN []

ACCT []

Commodity Desc []

Posted to JV []

Save As... Clear Filter Options **Execute Report**

Page Notes
Listing

millennium FAST

- ~ Click on **PSA20278** to view a PDF of the PSA
- ~ Click on the red asterisk and icon below **Notes** to view or add comments (these notes will not appear on the PSA)
- ~ Click on the red asterisk and icon below **Attach** to view or add attachments
- ~ Click on the green check mark below **PO** to see the PO number assigned to the PSA.

THOMPSON RIVERS UNIVERSITY

Version: 4.2.06 Environment: BANPROD

Return to Requisition Status (09:07:24 AM) Return to Report

Home Applications Requisitions Purchasing Departments Reporting Maintenance Administration Help

Web Requisitioning > Requisition Status > Search for status of requisitions (Data as of 25/02/2015 04:31:11 PM)

Filter Options Report Results Help + More

Specific Requisition = PSA20278

Row #	Req ID	Notes	Attach	Required Date	Activity Date	Created By	Suggested Vendor	Posted	PO	Cancelled	Cancelled By	Approval Queue	Copy	Commodity Total
1	PSA20278			24/08/2014	22/08/2014	SMCCOLMAN	Stuart, Mike	✓	✓			PURCHASING		\$5,098.50

- ~ To view all PSA's and WR's you have created, click on the magnifying glass below the **Created By** box, type in your last name and click **Search**, click on your name to highlight and click on **Add**, then **Execute Report**.
 - o Web Req's will appear at the top of the list and PSA's are at the bottom.

The screenshot shows the 'Requisition Status' page in the FAST system. The browser address bar shows the URL: <https://fastprod.tru.ca/FASTPORTAL/FASTWEBREQ/ReqStatus.aspx?VE1=nTeb18QqeX2oqSA4fW7w==#c>. The page header includes 'THOMPSON RIVERS UNIVERSITY' and 'Version: 4.2.06 Environment: BANPROD'. The user is logged in as 'Susanne Cross'. The main content area is titled 'Web Requisitioning > Requisition Status > Search for status of requisitions'. Below this, there are several filter options: 'Specific Requisition' (Equal), 'Created By' (with a magnifying glass icon), 'Approval Queue' (Equal), 'Suggested Vendor' (Equal), 'Posted' (dropdown), 'Required Date' (Equal), 'Activity Date' (Equal), 'PO' (dropdown), and 'FUND' (dropdown). A search modal is open over the 'Created By' field, showing a search for 'cross' with '1 record(s) found'. The search results table is as follows:

TEXT	VALUE
Cross, Susanne	SCROSS

Below the table is the instruction 'Select record(s) then press Add' and an 'Add' button. At the bottom of the page, there are buttons for 'Save As...', 'Clear Filter Options', and 'Execute Report' (which is circled in red). The footer includes the 'millennium' logo and the 'FAST' logo.