Submitting an Expense or Requisition in Fluid

Quick Reference Guide

Effective January 21, 2023

Submitting an Expense or Requisition in Fluid

Purpose: This quick reference guide shows you how to submit an expense report or requisition in the new PeopleSoft fluid user interface.

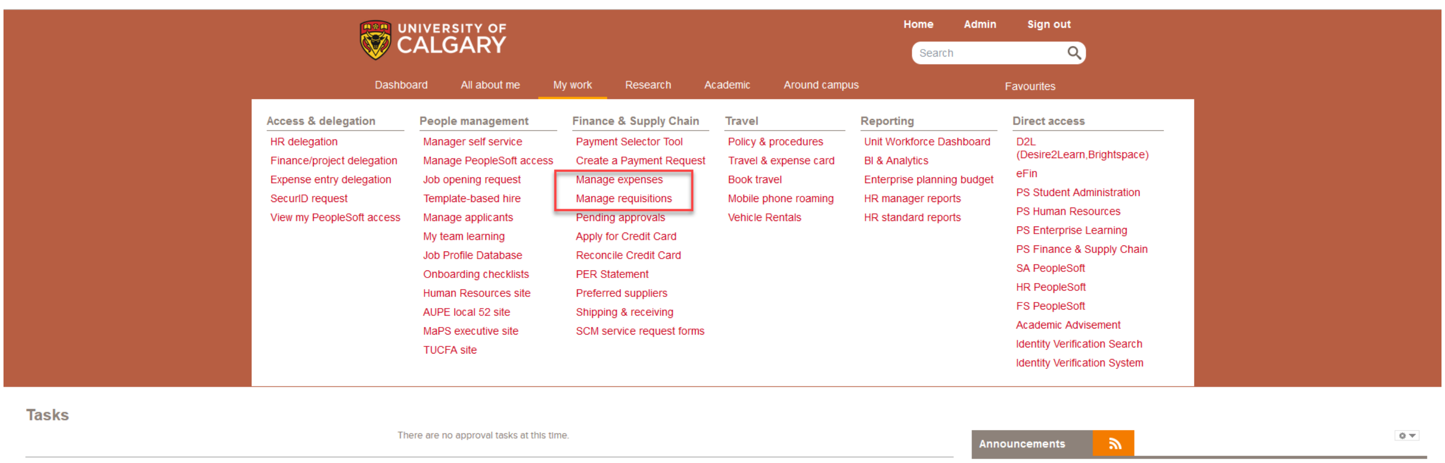
Audience: All University of Calgary staff who use PeopleSoft FSCM (Finance and Supply Chain Management) to complete an expense report or submit an eProcurement requisition.

The process for submitting an expense or a new requisition has not changed with the new fluid interface. You will access the link on the my.ucalgary.ca portal under My Work.

There is only one minor difference; there is only one link now for each function.

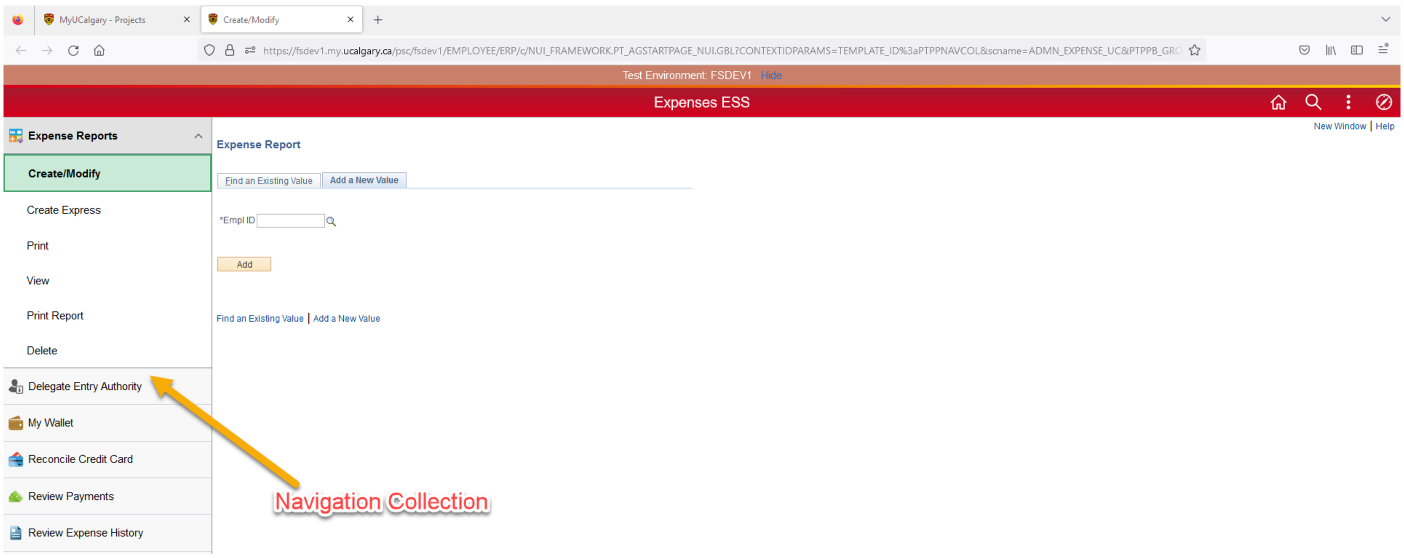
Manage Expenses

Manage Requisitions

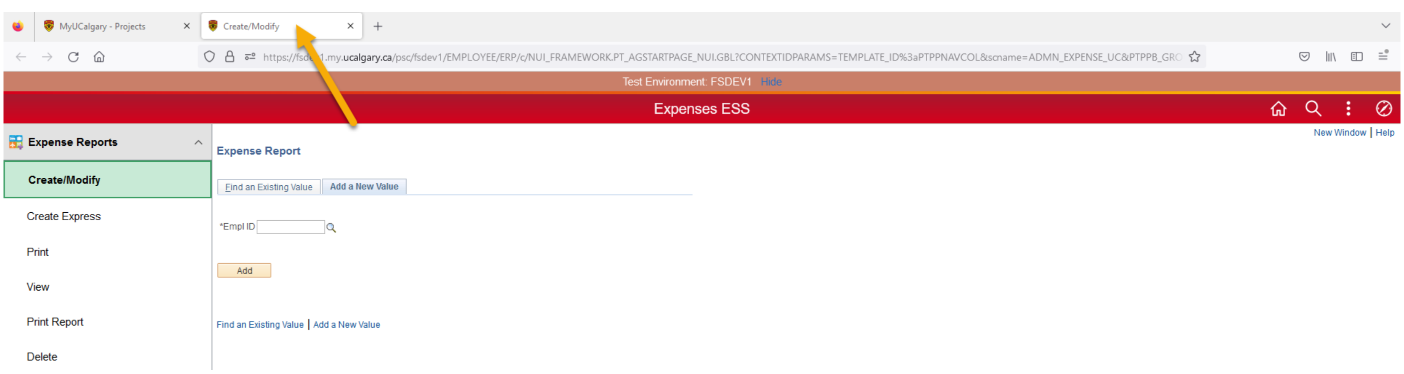


Manage Expenses

You will add a new expense report as you have done in the past. Instead of two pages to access information, you now have all the additional tasks on the left-hand side of your screen; this is called a Navigation Collection.

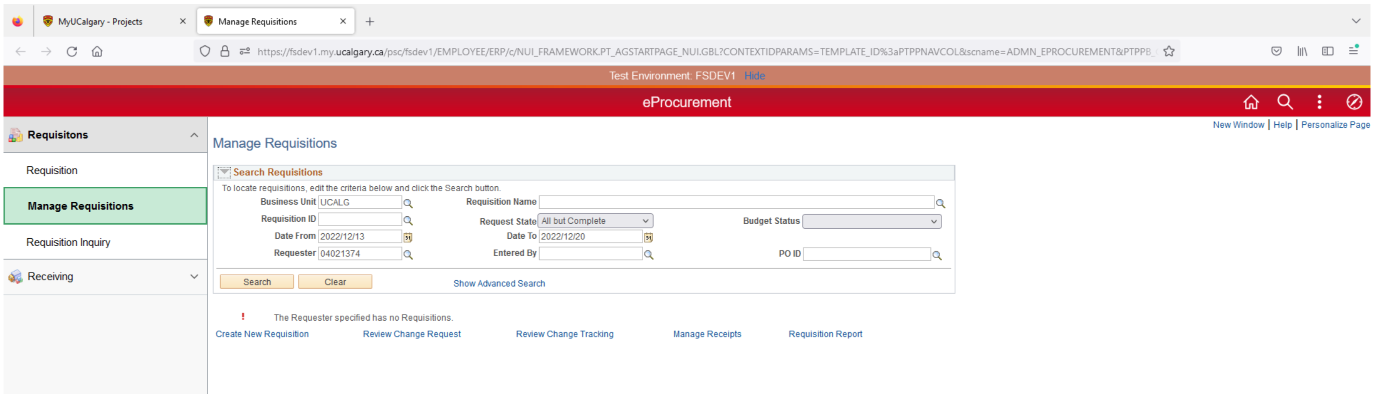


Once you have completed your submission or review of an existing expense report, click on the Create Modify Tab to close the Expense report task; this will take you back to the portal.

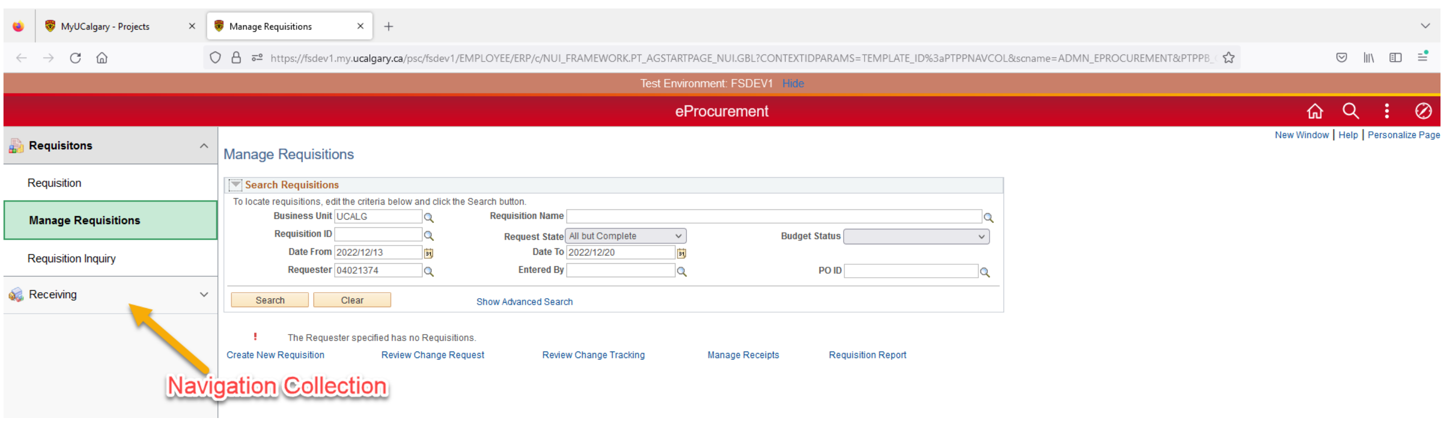


Manage Requisition

From the my.ucalgary.ca portal – My Work section, click on Manage requisitions.



From this page you can create or make an inquiry re. an existing requisition. The Navigation Collection on the left side of your screen provides a list of tasks available to you.



When you have completed your new requisition or requisition inquiry, click on the Manage Requisitions Tab to return to the portal.