

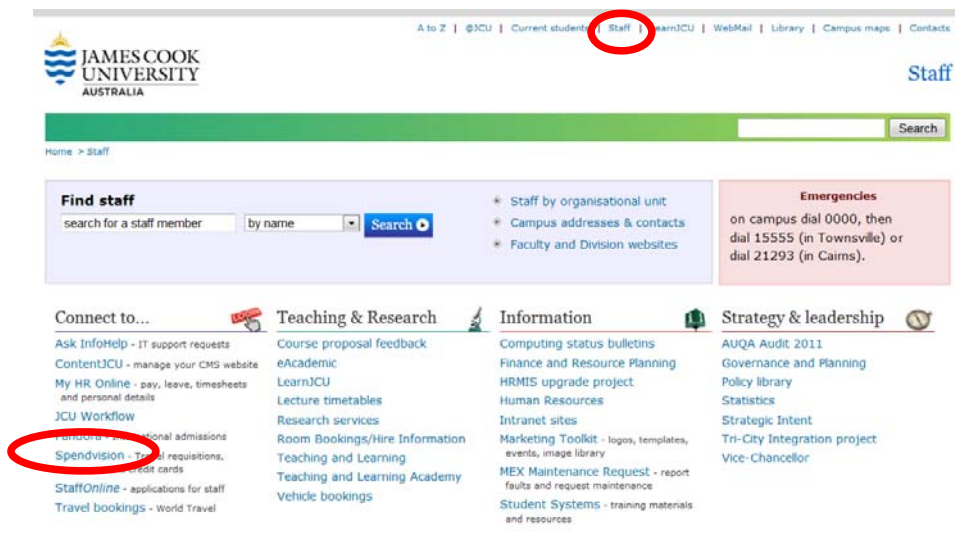
**Section:** Financial Operations  
**Task:** How to [Retrieve your Spendvision Requisition Number](#)  
**Duty:** JCU Staff  
**Responsible Position:** JCU Staff

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This procedure outlines the process of how to [retrieve your Spendvision Requisition Number](#) in Spendvision once you have created your Travel Requisition. The Requisition number will be requested from the University's (TMC's) – Preferred Travel Management Companies which are WTP (World Travel Professional's) & Escape Travel in order for them to book the travel.

## Instructions:

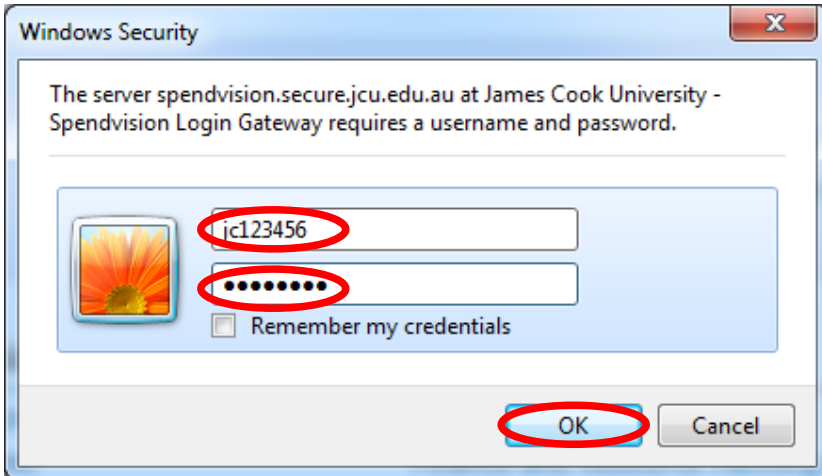
Log into Spendvision via the JCU staff website (<http://www.jcu.edu.au/staff/>) using the individual nominated JC number (e.g. JC123456) and password.



The screenshot shows the JCU Staff website interface. At the top, there is a navigation bar with links: A to Z | JCU | Current students | **Staff** | LearnJCU | WebMail | Library | Campus maps | Contacts. The 'Staff' link is circled in red. Below the navigation bar is a search bar with a 'Search' button. The main content area is divided into several sections:

- Find staff:** A search box with a dropdown menu set to 'by name' and a 'Search' button. To the right are links for 'Staff by organisational unit', 'Campus addresses & contacts', and 'Faculty and Division websites'.
- Emergencies:** A pink box containing contact information: 'on campus dial 0000, then dial 15555 (in Townsville) or dial 21293 (in Cairns)'.
- Connect to...:** A list of links including 'Ask InfoHelp - IT support requests', 'ContentJCU - manage your CMS website', 'My HR Online - pay, leave, timesheets and personal details', 'JCU Workflow', 'Spendvision - Travel requisitions, credit cards' (circled in red), 'StaffOnline - applications for staff', and 'Travel bookings - World Travel'.
- Teaching & Research:** Links for 'Course proposal feedback', 'eAcademic', 'LearnJCU', 'Lecture timetables', 'Research services', 'Room Bookings/Hire Information', 'Teaching and Learning', 'Teaching and Learning Academy', and 'Vehicle bookings'.
- Information:** Links for 'Computing status bulletins', 'Finance and Resource Planning', 'HRMS upgrade project', 'Human Resources', 'Intranet sites', 'Marketing Toolkit - logos, templates, events, image library', 'MEX Maintenance Request - report faults and request maintenance', and 'Student Systems - training materials and resources'.
- Strategy & leadership:** Links for 'AUQA Audit 2011', 'Governance and Planning', 'Policy library', 'Statistics', 'Strategic Intent', 'Tri-City Integration project', and 'Vice-Chancellor'.

Log into Spendvision via the JCU staff website (<http://www.jcu.edu.au/staff/>) using the individual nominated JC number (e.g. JC123456) and password then click ok.



'Accept' the JCU Expense Management System disclaimer.

A screenshot of the Spendvision website's disclaimer page. The top left corner features the Spendvision logo, which consists of a stylized sunburst icon followed by the word "Spendvision". The main heading is "James Cook University (JCU) Expense Management System (EMS)". Below the heading, there is a paragraph of text: "By clicking on the 'Accept' button below, the user acknowledges that they have read, understood, and will comply with the statements below, and JCU Policies and Procedures." This is followed by the text "Users will ensure that:" and a bulleted list of three items: "All transactions appearing in the online statement via the Spendvision Expense Management System are acquitted within 21 days of the completion of travel/purchasing transaction; and", "Images of all tax invoices/receipts/statutory declarations/other documentation are scanned and uploaded into Spendvision (where possible); or", and "If documentation is not uploaded into Spendvision, the original tax invoices/receipts/statutory declarations/other documentation must be retained for a period of 7 years for audit and tax purposes. (This original documentation must be handed in to the relevant School/Directorate Finance Officer upon resignation from the University).". Below the list is a section titled "Forms and Guides" with four links: "FMPM 420 - Policy - Corporate Credit Cards", "FMPM 421 - Procedure - Corporate Credit Cards", "FMPM 740 - Policy - Travel", "FMPM 741 - Procedure - Travel", "FMPM 742 - Authorised Limits - Travel", "FMPM 710 - Policy - Purchasing", and "FMPM 711 - Procedures - Purchasing". At the bottom of the page, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red.

1. From the main Spendvision Screen, Click on Requisition

The screenshot shows the Spendvision main dashboard. At the top, there is a navigation bar with 'Language', 'Settings', 'Help', and 'Log out'. Below this is a secondary navigation bar with 'Home', 'Reports', and 'Contacts'. The main content area is divided into two columns. The left column contains a 'Main Menu' with links for 'Account Statements', 'Expense Reimbursement', 'Requisition' (circled in red), 'Expense Reports', and 'Reports'. The right column displays a 'Welcome Tammy Walsh' message, 'Your Accounts' section for 'National Australia Bank', and summary statistics for 'Expense Reimbursement items' and 'Requisition items'. The James Cook University Australia logo is visible in the top right corner.

2. Click on the name of the applicable Travel Requisition from which you want to source the Travel Requisition number.

The screenshot shows the 'Account Statement Requisitions' page. At the top, there is a navigation bar with 'Language', 'Settings', 'Help', and 'Log out'. Below this is a secondary navigation bar with 'Contacts'. The main content area is titled 'Account Statement Requisitions' and includes a 'Create New Requisition' link and a 'Back' link. The page displays a 'Shelley Hodge - Summary Statement' section with a table of requisitions. The requisition 'WTP Conf 18.04-20.04.12' is circled in red. Below the table, there is a 'Change View' section with links for 'Current', '6 months', '12 months', and 'All'.

Requisition Summary		Linked Details			
Requisition	Posted	Amount	Items	Total	Balance
test	03 Aug 2012	0.00	1	0.00	0.00
WTP Conf 18.04-20.04.12	18 Apr 2012	250.00			

- The below screen displays the Travel Requisition details, to open the Travel Requisition click on the Green Tick on the right hand side of the Requisition amount.


Language Settings Help Log out

Contacts

Account Statement [Delete Requisition](#)  
[Back](#)



Requisition  
 Shelley Hodge - Summary Statement

Requisition Details - AUD [Close Requisition](#)

Tran Date	Summary	Receipt	Source Amount	Amount Incl
17 Apr 2012	WTP Cont 18.04-20.04.12			250.00 

\*This Requisition is due to automatically close on 14 Oct 2012.

[Manage Receipt Images](#)

Requisition Breakdown		Linked Items			
Category		Allocated	Card	Expense Reimbursement	Balance
Domestic Travel Requisition	Ground Transport	50.00			50.00 
	Meals	200.00			200.00 





- This will then open the Requisition Details page as per below, click on the “Domestic Travel Requisition “Spendwizard” next to the half ball/half world on the left hand side.

Requisition Details [Close Requisition](#)

Purchase Request 20 Sep 2012  
 Amount \$739.00 AUD  
 Finance Meeting Cairns 2012

Expense Type Coding Summary Approval

Options

 **Domestic Travel Requisition 739.00**  Domestic Travel Requisition  General Purchase Requisition  
 International Travel Requisition

- The below screen shows the Requisition budget details, click on the “Print Requisition” (top centre of page) to open the Requisition Details.

Requisition Details [Close Requisition](#)

Purchase Request 17 Apr 2012  
 Amount \$250.00 AUD  
 WTP Cont 18.04-20.04.12

Expense Type Coding Summary Approval

Options [Print Requisition](#)

You are required to have a Travel Requisition approved before undertaking domestic travel on behalf of the University.

All airfares and domestic car hire must be booked through the University's contracted Travel Management Company (TMC). Accommodation and other travel related expenses should be booked through the University's TMC where practical.

Travel Costs (GST inclusive amounts)

All mandatory fields are indicated with a \*

Airfares			
TMC Management Fee			
Accommodation		Enter No. of Nights	
Meals	200.00		
Conference/Seminars			
Ground Transport	50.00		
Car Parking			
JCI Pool Vehicle			
Private MV Allowance			
International Allowance		Enter No. of Months	

6. The below screen will appear and displays the Requisition details of travel, you can locate the Requisition Number where indicated as per below:

**JAMES COOK UNIVERSITY AUSTRALIA** Domestic Travel Requisition

Domestic Travel Requisition for: Shelley Hodge  
 Created On: 17 Apr 2012

**Requisition Number: DOM R106720120417hfupjmsch**

Requisition Name: WTP Conf 18.04-20.04.12

Approval Rule: Dom Trvl HeadOrgUnit Approver Approved By: Danella Lane Date Approved: 18 Apr 2012  
 Approval Rule: Dom Trvl Cost Centre Approver Approved By: Danella Lane Date Approved: 18 Apr 2012

**Travel Summary**

Travel Start Date: 18 Apr 2012  
 Travel End Date: 20 Apr 2012

**Travel Expenses**

Airfares  
 TMC Management Fee  
 Accommodation

Note: - If you scroll down this page you have the option of e-mailing the Requisition Number directly from this screen as indicated below by typing the e-mail address in the E-mail box and click on e-mail.

Domestic Travel Requisition for: Shelley Hodge  
 Created On: 17 Apr 2012

Requisition Number: DOM R106720120417hfupjmsch  
 Requisition Name: WTP Conf 18.04-20.04.12

Approval Rule: Dom Trvl HeadOrgUnit Approver Approved By: Danella Lane Date Approved: 18 Apr 2012  
 Approval Rule: Dom Trvl Cost Centre Approver Approved By: Danella Lane Date Approved: 18 Apr 2012

**Travel Summary**

Travel Start Date: 18 Apr 2012  
 Travel End Date: 20 Apr 2012

**Travel Expenses**

Airfares  
 TMC Management Fee  
 Accommodation  
 Meals 200.00  
 Conference/Seminars  
 Ground Transport 50.00  
 Car Parking  
 JCU Pool Vehicle  
 Private MV Allowance  
 Incidental Allowance  
 Field Allowance  
 Camping Allowance  
 Entertainment  
 Other Expenses  
 Total Travel Budget 250.00

**Primary Purpose of Travel**  
 Attend Conference/Seminar

**Reason For Travel**  
 WTP conference

**Travel Diary**

Nature of Activity	Start Date	Start Time	Finish Date	Finish Time	Location of Activity
Travel/Transit/Unavoidable Delays	18 Apr 2012	13:00	18 Apr 2012	13:00	TSV-OOL
Attend Conference/Seminar	18 Apr 2012	13:00	20 Apr 2012	12:00	WTP - Gold Coast
Travel/Transit/Unavoidable Delays	20 Apr 2012	13:00	20 Apr 2012	17:00	OOL-TSV

**Employee Declaration**  
 I have acquired and listed all related travel expenses to this requisition. Yes  No

Signature: \_\_\_\_\_ Date: 20 Sep 2012

Email to: \_\_\_\_\_