

How to Create a My Requisition Template

This procedure outlines the process of how to create a My Requisition.

- a) Create a My Requisition template with prepopulated fields
 - b) Create a My Requisition from a template
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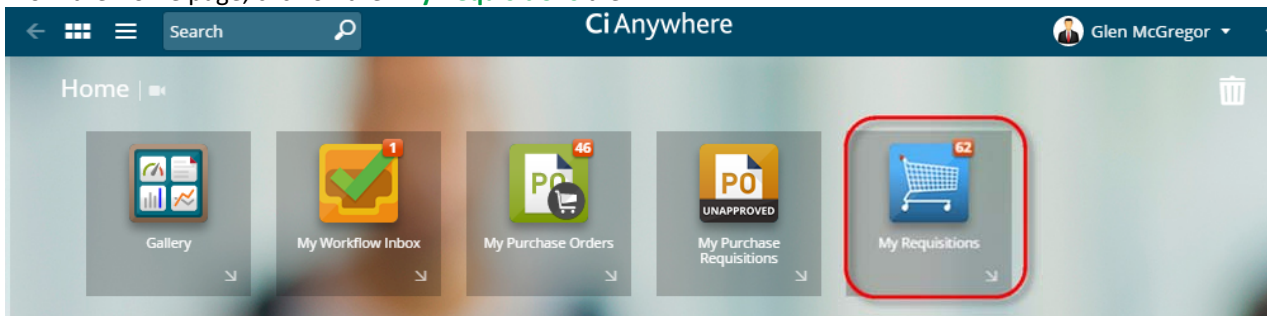
Create a My Requisition Template with prepopulated fields

1. Log into Ci Anywhere by entering in your Login ID in the **User Name** field and enter your usual PC login password in the **Password** field then click on **Log on**

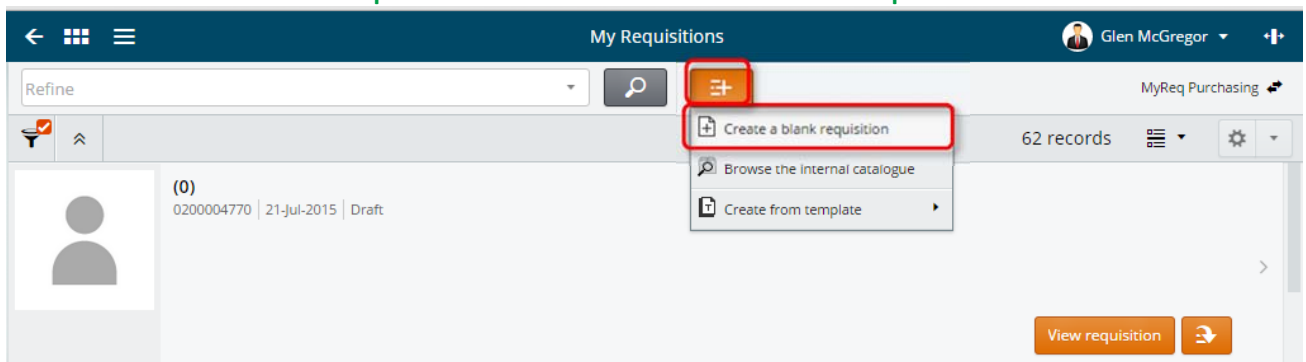


The image shows the Ci Anywhere login interface. At the top, it says "Ci Anywhere" and "Any device. Any where. Any time." Below this, there are social login options (Google, Facebook, etc.) and a section for logging in with a user name and password. The "User name" and "Password" fields are highlighted with a red box, and the "Log on" button is also highlighted with a red box. There is a "Keep me logged on" checkbox at the bottom.

2. From the Home page, click on the **My Requisitions** tile

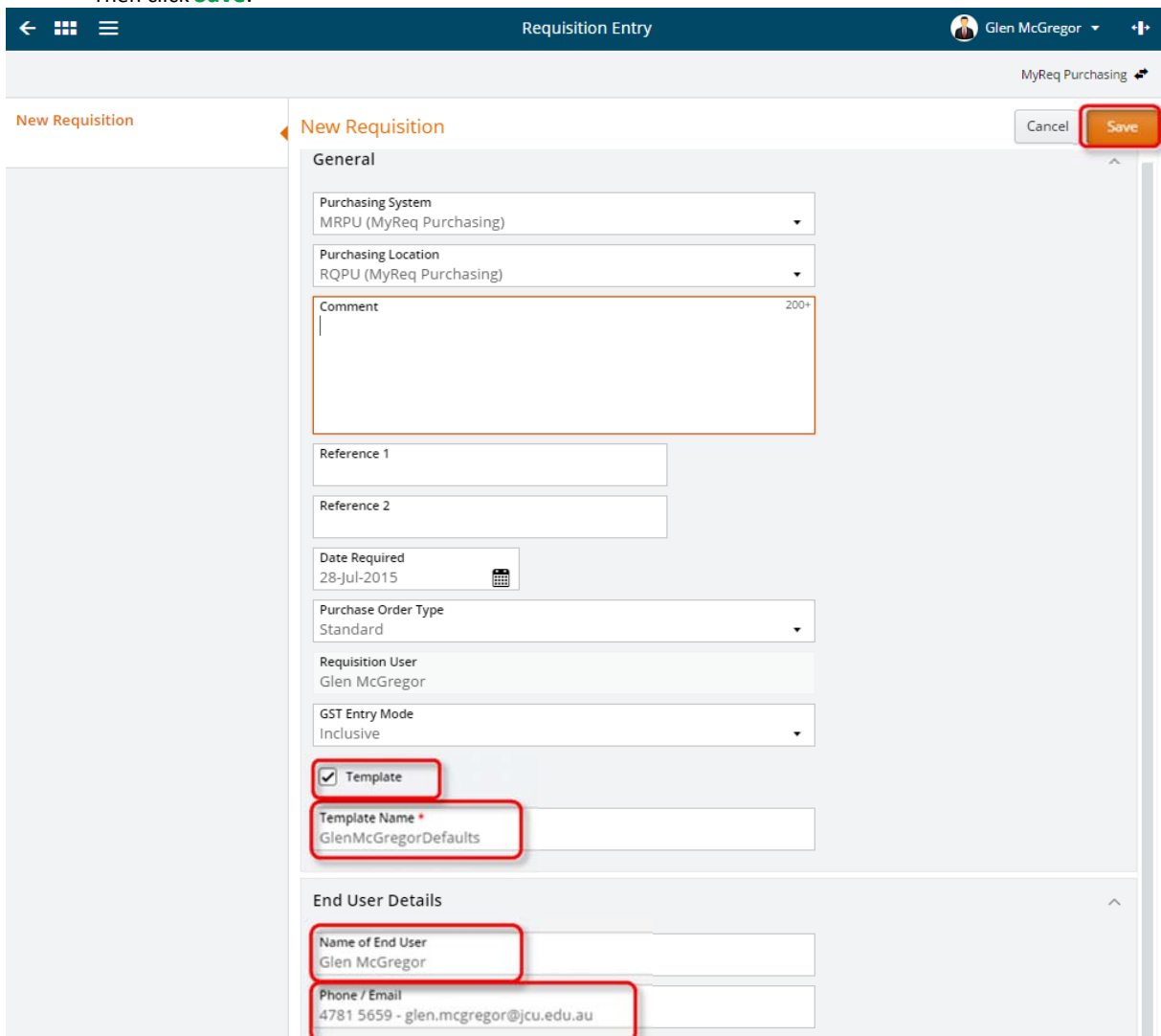


3. Click on the **Add new requisition** button and choose **Create a blank requisition**



The screenshot shows the 'My Requisitions' dashboard. At the top, there's a navigation bar with a search icon and a user profile 'Glen McGregor'. Below the navigation bar, there's a 'Refine' search bar and a 'MyReq Purchasing' link. A red box highlights the 'Add new requisition' button, and another red box highlights the 'Create a blank requisition' option in the dropdown menu. The dashboard also shows a list of requisitions with columns for status, ID, date, and draft status. A 'View requisition' button is visible at the bottom right.

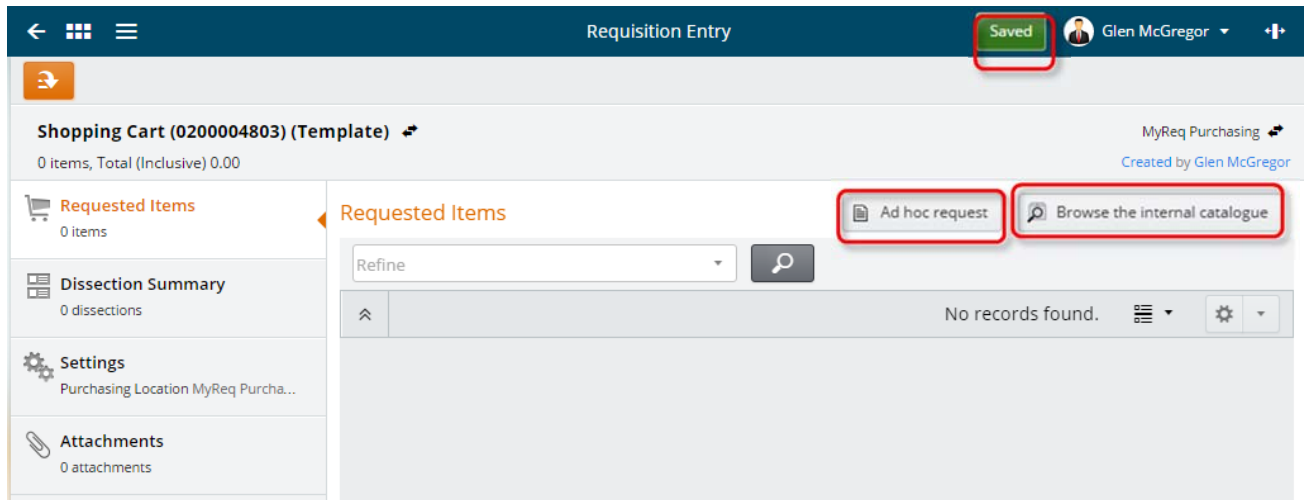
4. Once the Requisition Entry Screen appears, tick on the **Template** checkbox. Enter a **Template Name** e.g. "GlenMcGregorDefaults".
If you would like to record the End User Details in the template so they are prepopulated, you can enter them in the **Name of End User** and the **Phone / Email**. If these values are likely to change, then leave them blank.
Then click **Save**.



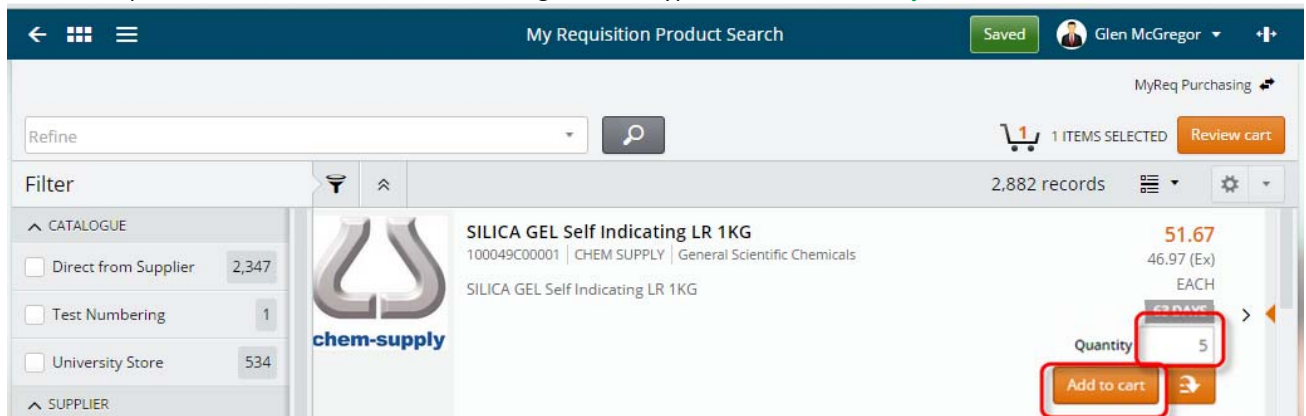
The screenshot shows the 'Requisition Entry' screen. The 'New Requisition' tab is selected. The 'General' section contains fields for 'Purchasing System' (MRPU (MyReq Purchasing)), 'Purchasing Location' (RQPU (MyReq Purchasing)), 'Comment' (200+), 'Reference 1', 'Reference 2', 'Date Required' (28-Jul-2015), 'Purchase Order Type' (Standard), 'Requisition User' (Glen McGregor), and 'GST Entry Mode' (Inclusive). The 'Template' checkbox is checked and highlighted with a red box. The 'Template Name' field is filled with 'GlenMcGregorDefaults' and highlighted with a red box. The 'End User Details' section contains fields for 'Name of End User' (Glen McGregor) and 'Phone / Email' (4781 5659 - glen.mcgregor@jcu.edu.au), both highlighted with red boxes. The 'Save' button is highlighted with a red box.

5. This template has now been **saved** and is ready to be used for future use.

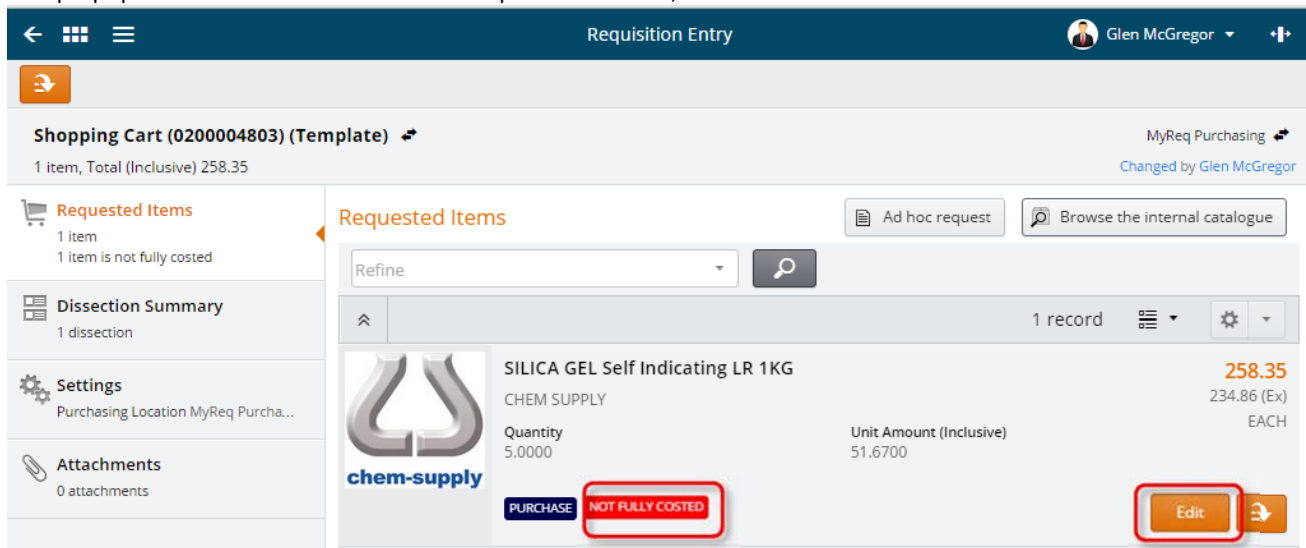
If you have frequent purchases for the same product and supplier, you can also add these items to the template. To add an item to the template click the **Ad hoc Request** button or the **Browse the internal catalogue**





As an example, to add 5 x "Silica Gel Self Indicating LR 1KG", type in 5 in the **Quantity** Field and then click **Add to cart**.





This template now has 5 x Silica Gel Self Indicating LR 1KG. You will notice the red message box stating that the item is **NOT FULLY COSTED**. If the account code assigned to this purchase will be the same for each of the purchases, you can also prepopulate the account code in this template. To do this, click the **Edit** button.





Scroll down to the **Cost Account** Section and find the **Account** field which will look like
@@@@.@@@@.@@@@.8432



Shopping Cart (0200004803) (Template)  MyReq Purchasing 
1 item, Total (Inclusive) 258.35 Changed by Glen McGregor


 **Requested Items**
1 item
1 item is not fully costing

 **Dissection Summary**
1 dissection

 **Settings**
Purchasing Location MyReq Purcha...

 **Attachments**
0 attachments

Requested Items  


Supplier 

Supplier
CHEM SUPPLY


Supplier Ledger Code
CG

Account
CHEMSU.00 (CHEM SUPPLY)


Currency
AUD (Australian Dollar)

Office Use Only 

JCU Contract ID 40

Restricted Drugs and Poisons 

I've completed and attached an End User Declaration
N (No)

Cost Account 






Ledger Code
00 (015A)


Account
@@@@.@@@@.@@@@.8432



☐ Apply Cost Account To All Lines


☐ Add Another Cost Account


Type in the relevant account/s for this purchase and then click **save**.


   Requisition Entry  Glen McGregor 






Shopping Cart (0200004803) (Template)  MyReq Purchasing 
1 item, Total (Inclusive) 258.35 Changed by Glen McGregor


 **Requested Items**
1 item
1 item is not fully costing


 **Dissection Summary**
1 dissection


 **Settings**
Purchasing Location MyReq Purcha...


 **Attachments**
0 attachments


Requested Items  

Requested Item 

Supplier 

Office Use Only 

Restricted Drugs and Poisons 

Cost Account 


Ledger Code
00 (015A)

Account
1420.11100.0001.8432 (Services Divisi)

This item with a default account code has now been saved to the template. The Requisition Number also has the word **Template** listed to clearly indicate this is a template. You can add additional items to the template.

The screenshot displays the 'Requisition Entry' interface. At the top, a dark blue header bar contains navigation icons, the title 'Requisition Entry', a 'Saved' button, and a user profile for 'Glen McGregor'. Below the header, a light grey bar shows the 'Shopping Cart (0200004803) (Template)' with a red box highlighting the '(Template)' label. It also indicates '1 item, Total (Inclusive) 258.35' and 'MyReq Purchasing'.

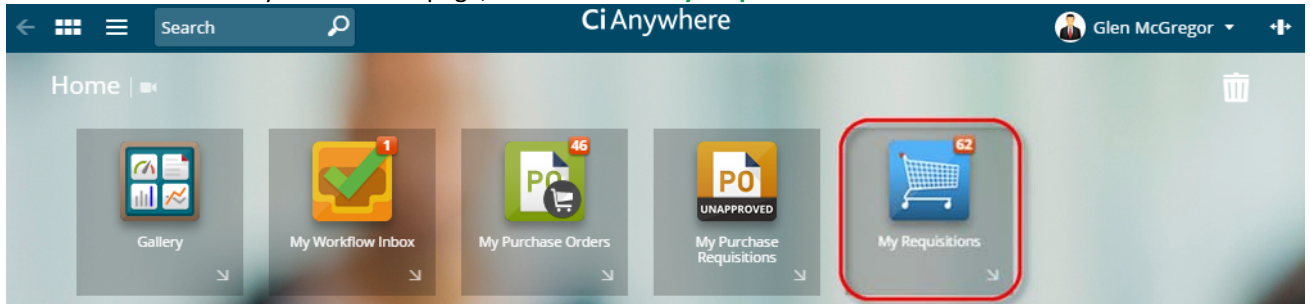
The main content area is divided into a left sidebar and a right pane. The sidebar includes links for 'Requested Items' (1 item), 'Dissection Summary' (1 dissection), 'Settings' (Purchasing Location MyReq Purcha...), and 'Attachments' (0 attachments). The right pane is titled 'Requested Items' and features a search bar, a 'Refine' dropdown, and buttons for 'Ad hoc request' and 'Browse the internal catalogue'. Below this, a table lists the items:

Requested Items	
	<div><div>SILICA GEL Self Indicating LR 1KG</div><div>CHEM SUPPLY</div><div>Quantity 5.0000</div><div>Unit Amount (Inclusive) 51.6700</div></div> <div><div>258.35</div><div>234.86 (Ex)</div><div>EACH</div></div> <div><div>PURCHASE</div><div>Edit</div></div>

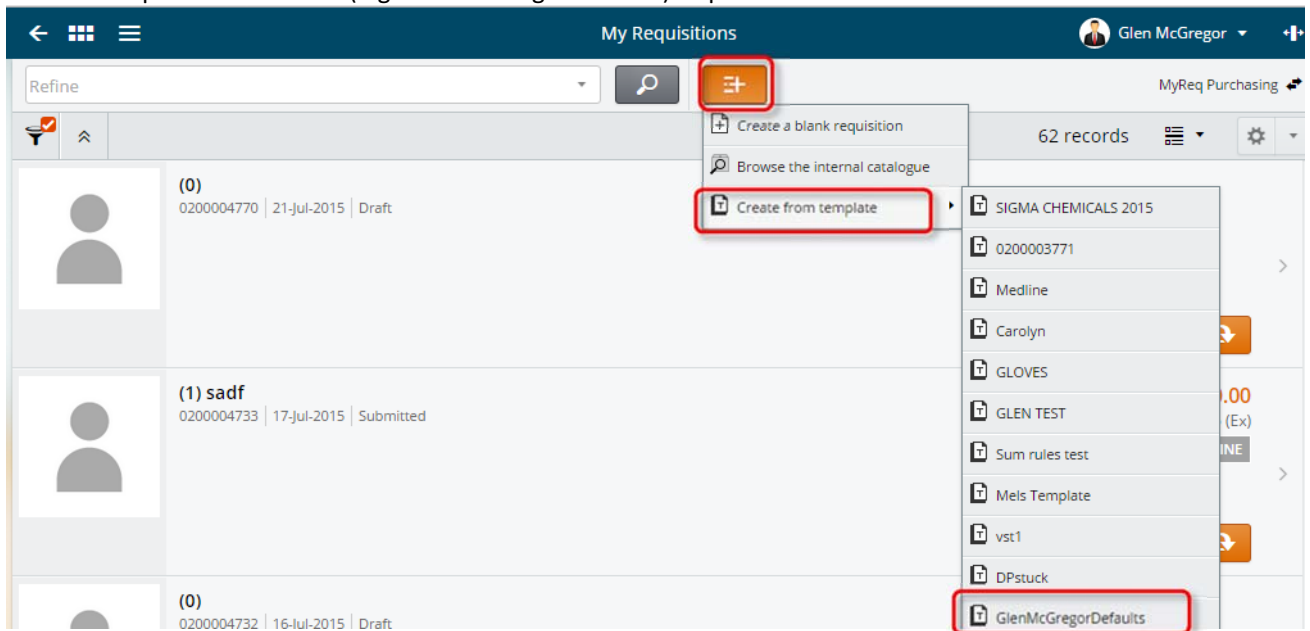
See step 2 below on how to create a requisition from a template

Create a My Requisition from a template

1. From the Ci Anywhere Home page, click onto the **My Requisitions** tile



2. Click on the **Add new requisition** button and choose **Create from template** and then select the relevant template from the list (e.g. GlenMcGregorDefaults) requisition



3. The template has successfully loaded and assigned a new Requisition Number (e.g. 0200004804).

You can modify any of the template fields before submitting for approval and you can also add/delete items from the requisition.


Once the requisition is completed, click **Submit for Approval**.

←

☰

☰

Requisition Entry

 Glen McGregor

Submit for Approval

➔

Shopping Cart (0200004804)

MyReq Purchasing

1 item, Total (Inclusive) 258.35

Changed by Glen McGregor

Requested Items

1 item

Dissection Summary

1 dissection

Settings

Purchasing Location MyReq Purcha...

Authorisation History

2 items

Attachments

0 attachments

Requested Items

Ad hoc request

Browse the internal catalogue

Refine


🔍

1 record

⌵

⚙️

⌵



SILICA GEL Self Indicating LR 1KG

CHEM SUPPLY

Quantity
5.0000

Unit Amount (Inclusive)
51.6700

258.35

234.86 (Ex)

EACH

PURCHASE

Edit

➔

7