Finance One My Requisitions Procedure

How to View and Action a My Requisition Approval

This procedure outlines the process of how to view and action a My Requisition approval.

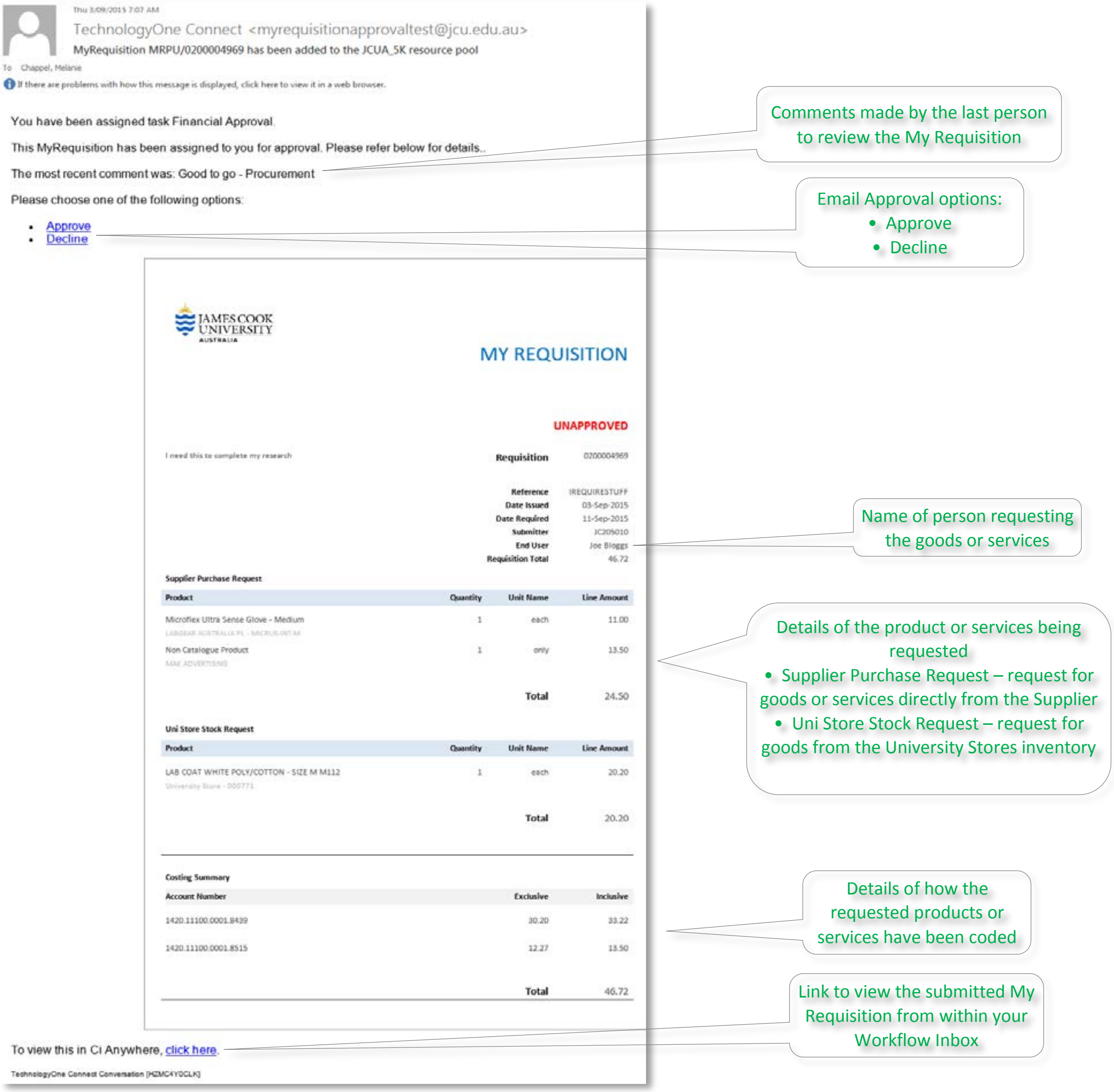
a) View and Action an Approval directly from your JCU Outlook Email (pages 1 to 3)

b) View and Action an Approval from your CiAnywhere My Workflow Inbox (pages 4 to 10)

c) How to Delegate your Approvals before commencing planned absences (pages 11 to 15)

View and Action My Requisition Approvals from your JCU Outlook Email

1. When a user clicks Submit for Approval for a My Requisition which requires your approval, an automatic email will be generated to your personal JCU email address from sender myrequisitionapproval@jcu.edu.au.



Please Note – Email approvals via smart phone or tablet

To ensure you are able to perform email approvals via smart phone or tablet correctly, please use one of the following options:

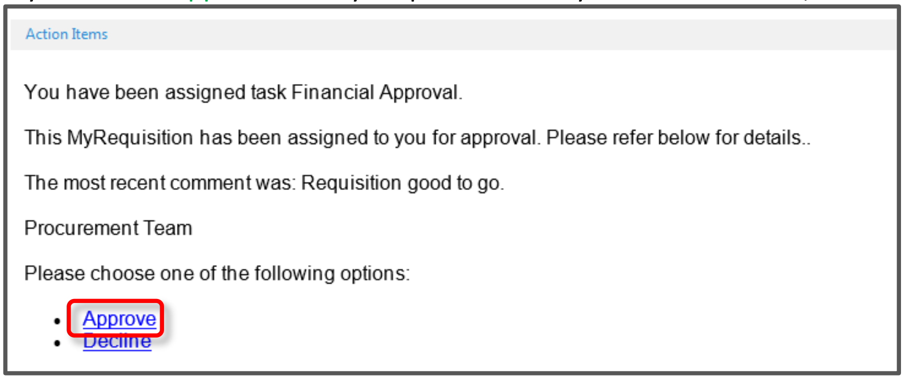
a. JCU Staff Outlook Web App
   i. Login to the JCU Staff Outlook Web App on your smart phone or tablet - https://outlook.office.com/owa/?realm=jcu.edu.au

b. Outlook App
   i. Download and install the Outlook app from the Apple or Android Store onto your smart phone or tablet (if you do not already have this installed)
   a. Setup your JCU email account - https://www.jcu.edu.au/information-and-communications-technology/connect/email/email-setup-for-mobiles

2. Approval Options:

a. **Approve**

i. If you wish to Approve the My Requisition from your Outlook email, click on the **Approve** link


Action Items

You have been assigned task Financial Approval.

This MyRequisition has been assigned to you for approval. Please refer below for details..

The most recent comment was: Requisition good to go.

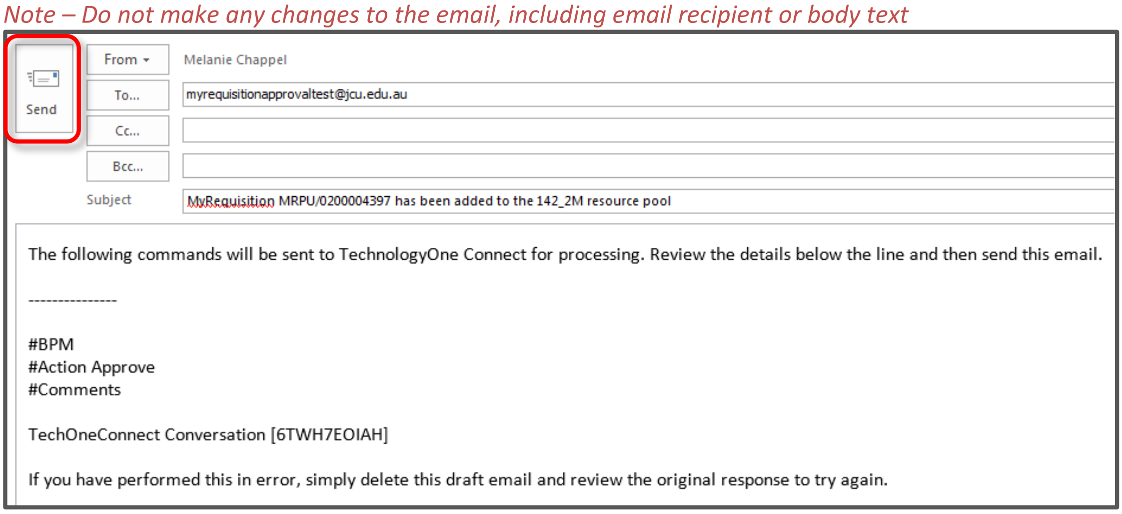
Procurement Team

Please choose one of the following options:

- Approve
- Decline

ii. An Approval Command email will be generated to send back to the My Requisition system. To finalise the approval, click on the **Send** button

Note – Do not make any changes to the email, including email recipient or body text


Send

From: Melanie Chappel

To...: myrequisitionapprovaltest@jcu.edu.au

Cc...

Bcc...

Subject: MyRequisition MRPU/0200004397 has been added to the 142_2M resource pool

The following commands will be sent to TechnologyOne Connect for processing. Review the details below the line and then send this email.

#BPM
#Action Approve
#Comments

TechOneConnect Conversation [6TWH7EOIAH]

If you have performed this in error, simply delete this draft email and review the original response to try again.

b. **Decline**

i. If you wish to Decline the My Requisition from your Outlook email, click on the **Decline** link

> Action Items
>
> You have been assigned task Financial Approval.
>
> This MyRequisition has been assigned to you for approval. Please refer below for details..
>
> The most recent comment was: Requisition good to go.
>
> Procurement Team
>
> Please choose one of the following options:
>
> - Approve
> - Decline

c. An Approval Command email will be generated to send back to the My Requisition system. To finalise the decline, click on the **Send** button
Note – Do not make any changes to the email, including email recipient or body text

> Send
>
> From ▾ Melanie Chappel
>
> To... myrequisitionapprovaltest@jcu.edu.au
>
> Cc...
>
> Bcc...
>
> Subject MyRequisition MRPU/0200004397 has been added to the 142_2M resource pool
>
> The following commands will be sent to TechnologyOne Connect for processing. Review the details below the line and then send this email.
>
> ---------------
>
> #BPM
> #Action Decline
> #Comments
>
> TechOneConnect Conversation [6TWH7EOIAH]
>
> If you have performed this in error, simply delete this draft email and review the original response to try again.

c. **View requisition details and action approvals online**

i. If you wish to view more of the My Requisition details from your CiAnywhere Workflow Inbox, click on the **click here** link at the bottom left of your automated email

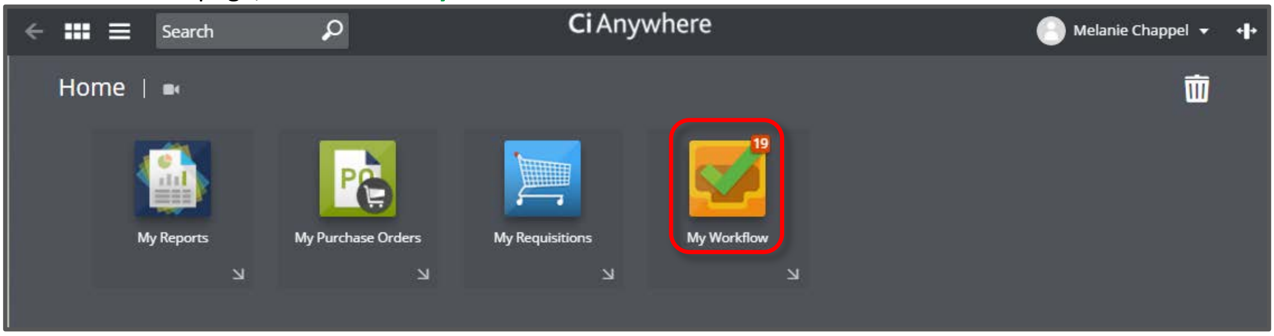
> Costing Summary
>
> | Ledger Code | Account Number | Exclusive | Inclusive |
> |---|---|---|---|
> | 00 015A | 1420.11100.0001.8439 | 8363.64 | 9200.00 |
> | 00 015A | 1420.11100.0001.8130 | 2.85 | 3.14 |
> | | | **Total** | 9,203.14 |
>
> To view this in Ci Anywhere click here
>
> TechnologyOne Connect Conversation [6TWH7EOIAH]

ii. For login and detailed approval instructions, refer to next steps starting on page 4 “View and Action an Approval from your CiAnywhere My Workflow Inbox”

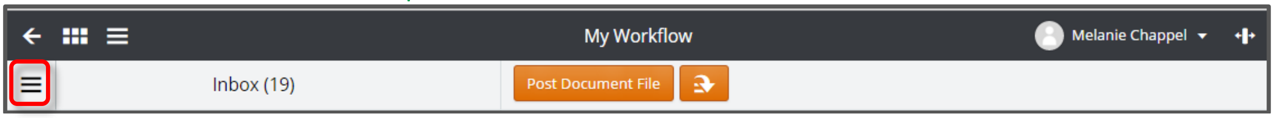
View and Action My Requisition Approvals from your CiAnywhere My Workflow Inbox

3. 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**.

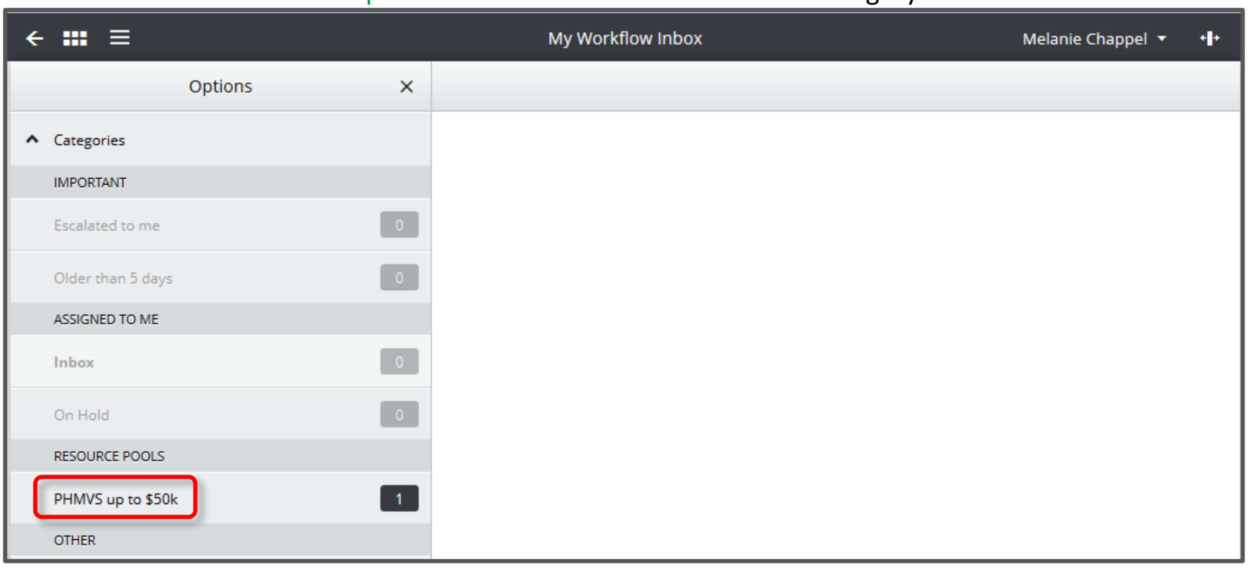
4. From the Home page, click on the **My Workflow** tile.



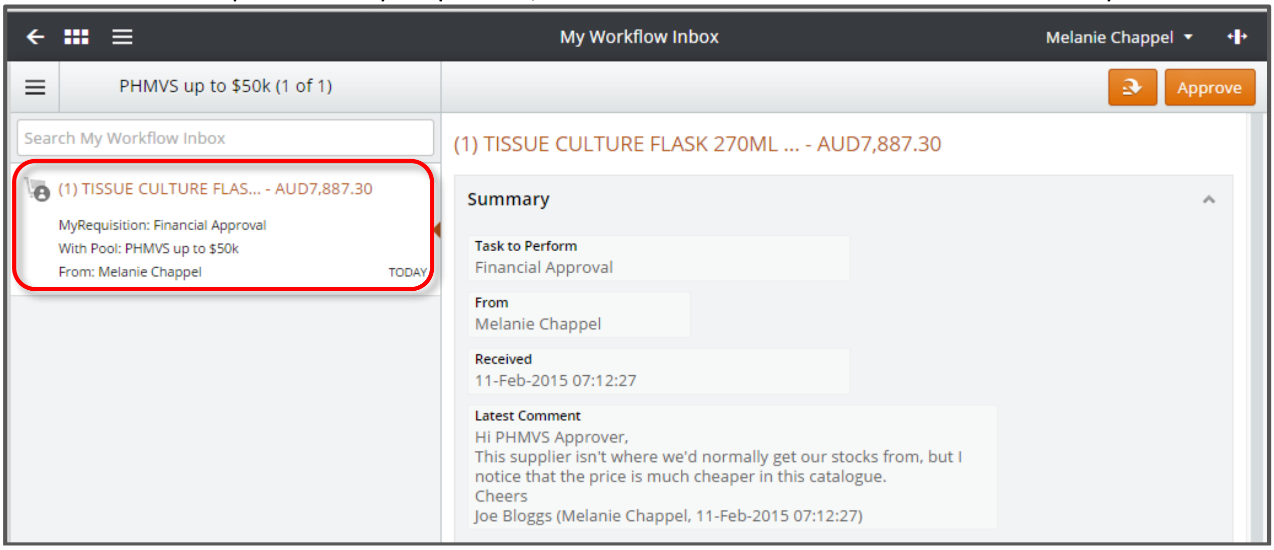
5. Click on the **Menu** icon to show Options.



6. Click on the relevant resource pool name under the **Resource Pools** category.



7. Submitted My Requisitions will appear in your resource pool workflow inbox descending from most current. To view a particular My Requisition, click on the item listed on the left hand side of your screen.



8. Workflow item Sections Information:

a. **Summary**

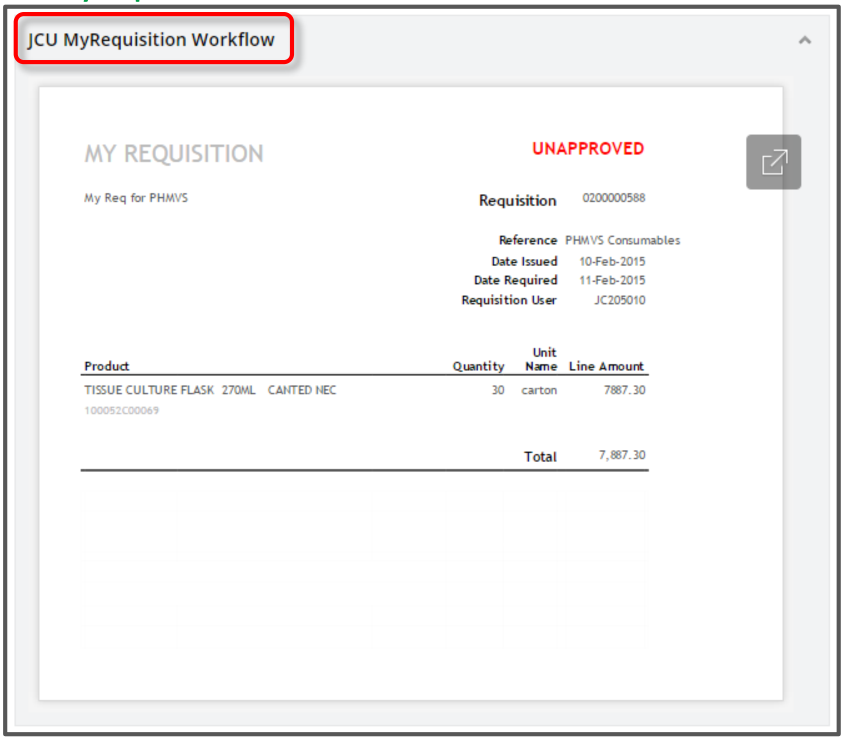
i. Tasks to Perform
A brief description as to why you are receiving the My Requisition for approval

ii. From
The full name of the staff member who has created and submitted the My Requisition.

iii. Received
The date and time the My Requisition has been received in your resource pool workflow inbox.

iv. Latest Comment
This is text entered by the My Requisition submitter (the ‘From’ staff member) as a means to add any additional comments or narrative about the request upon submission of the My Requisition.

b. **JCU MyRequisition Workflow**



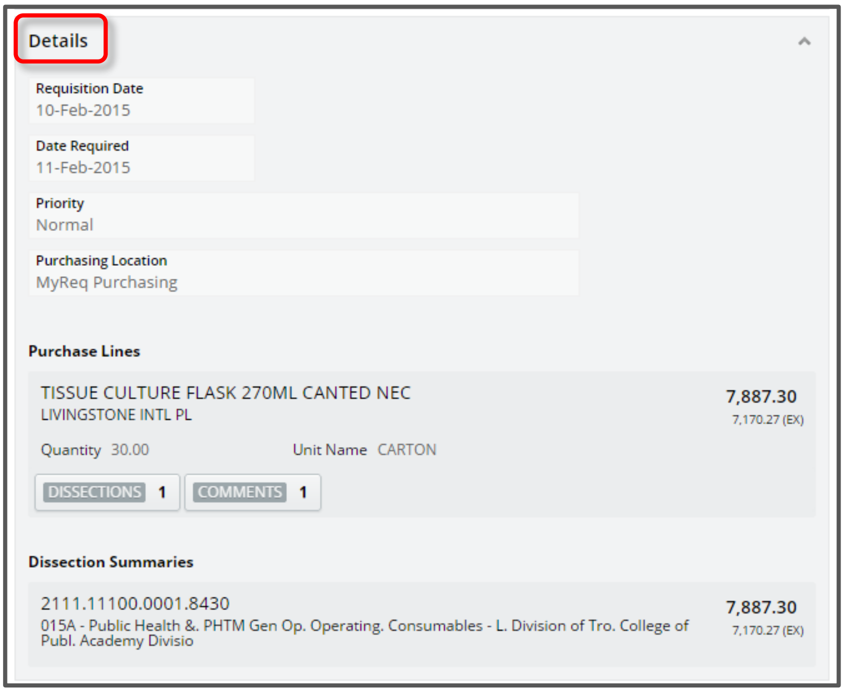
i. Document View

This image is what is termed the 'Natural View' of the My Requisition request. The information contained on this document makes up the bulk of what will be produced on the final Purchase Order to the supplier. The document gives the Description of what submitter is wishing to purchase, the Quantity and the Amount (Inclusive of GST), both for each item being requested and Total of all items.

ii. Expand

The Expand icon will appear at the top right of the section anytime the approver hovers over the document. This allows the approver to view an enlarged view of the My Requisition document.

c. **Details**



i. Requisition Date
This is the date the My Requisition was created by the submitter. This is not the date the My Requisition was submitted for approval.

ii. Date Required
This is the date that the submitter has requested that the full order be completed by.

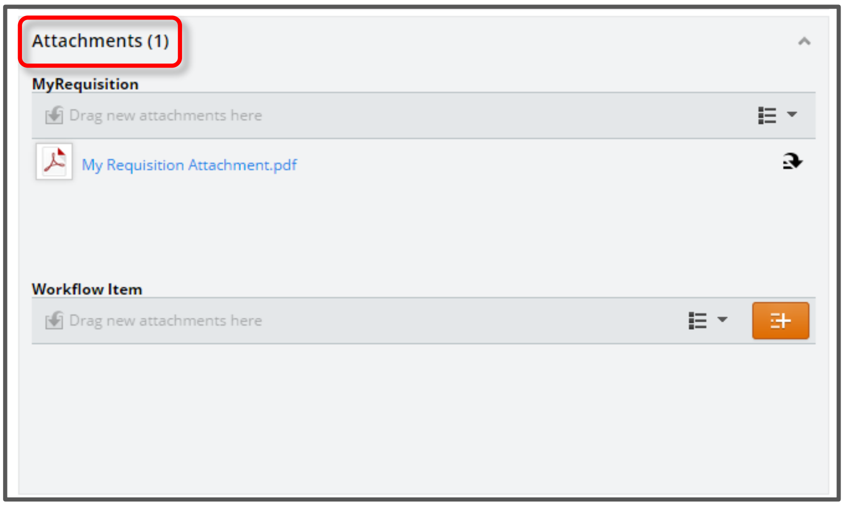
iii. Priority
This is the Priority level the submitter has indicated that the full order be given. Choices for this selection are Normal, High, Urgent and Emergency.

iv. Purchasing Location
This field will always show a location of MyReq Purchasing.

v. Purchase Lines
This area sets out the details of the items being requested, including the Description of the items, the Supplier name, the Quantity and the Amounts (Including and Excluding GST).

vi. Dissection Summaries
This area gives the account information (including the account description) the items have been requested to be expensed to.

d. Attachments

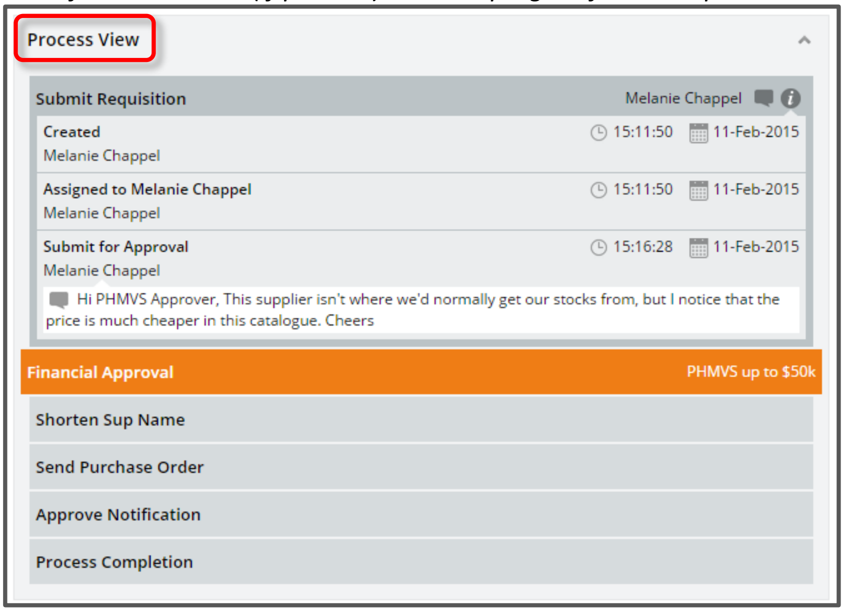


i. MyRequisition
This is where the submitter has added attachments prior to submitting their My Requisition. These attachments are generally supporting documentation for the purchase request and it's not mandatory to add attachments. To view the contents, simply click on the name of the attachment. You may also drag-and-drop additional attachments of your own, however attachments in this area are generated along with the final Purchase Order and automatically forwarded to the supplier.

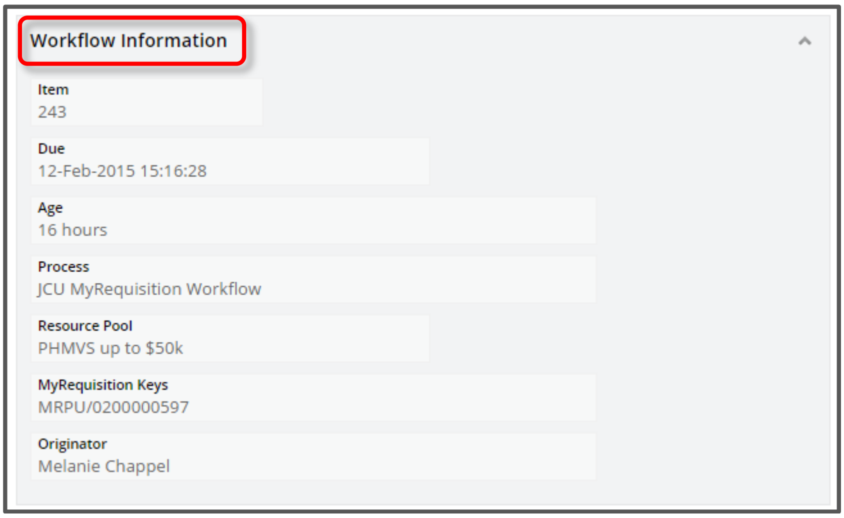
ii. Workflow Item
This is where the Approver has an opportunity to add additional attachments or notes if required. The Approver can either drag-and-drop or use the Add icon to add Files, Notes or a URL.

e. **Process View**

Process View gives the approver a step-by-step listing on the workflow details of the submitted My Requisition. A step highlighted in orange show where the approval is currently sitting within the workflow. There may be more information to be viewed after the completion of each step by clicking on the Information icon (if present) at the top right of each step.



f. **Workflow Information**



i. Item

Every My Requisition submitted for approval is given an item number starting at number 1.

ii. Due

This is the date that the submitter has requested that the full order be completed by.

iii. Age

The age in hours from when the My Requisition has been received into the Resource Pool Workflow Inbox for approval actioning.

iv. Process

The workflow process that the My Requisition is following through the system.

v. Resource Pool

The name of the Resource Pool that the workflow process is currently sitting with for approval actioning.

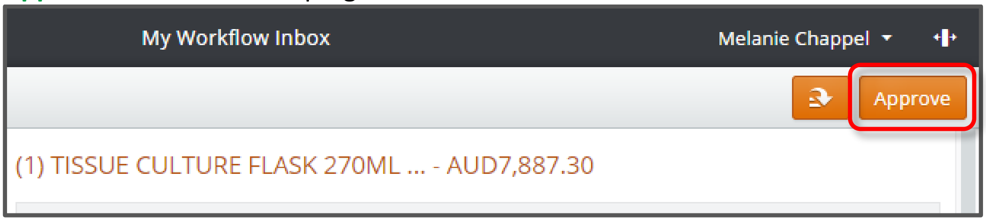
vi. My Requisition Keys
This is simply the Purchasing Location combined with the My Requisition Number.

vii. Originator
The full name of the staff member who created and submitted the My Requisition.

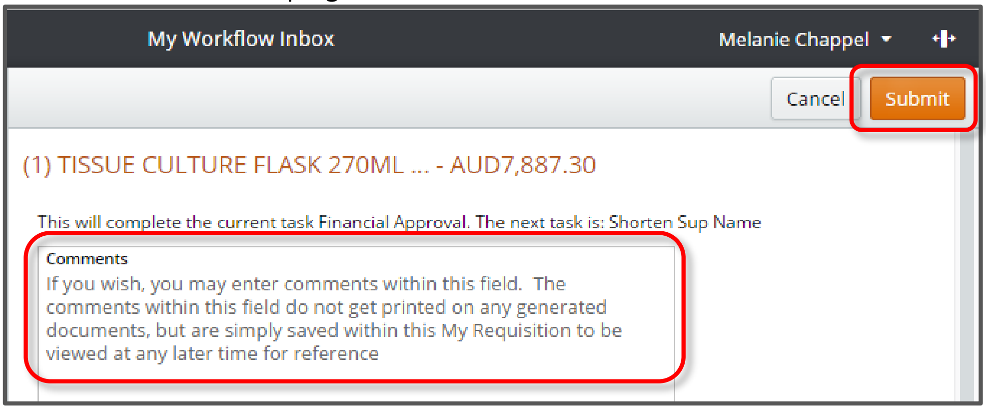
9. Approval Options:

a. **Approve**

i. If, after reviewing the My Requisition details, you wish to Approve the expenditure, click on the **Approve** button at the top right of the screen.

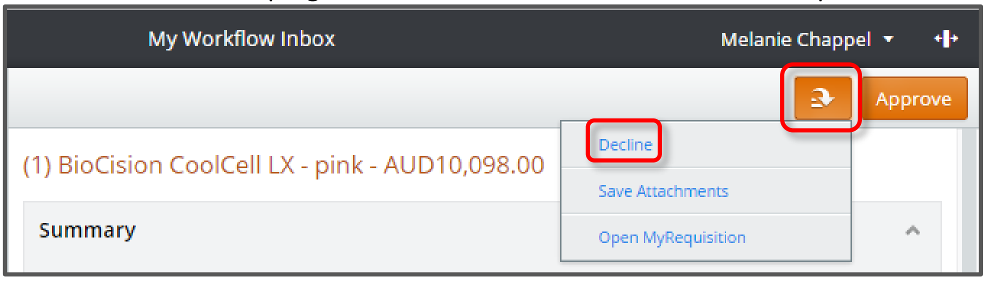


ii. Insert any comments you wish to add (not mandatory) in the **Comments** field, then click on the **Submit** button at the top right of the screen

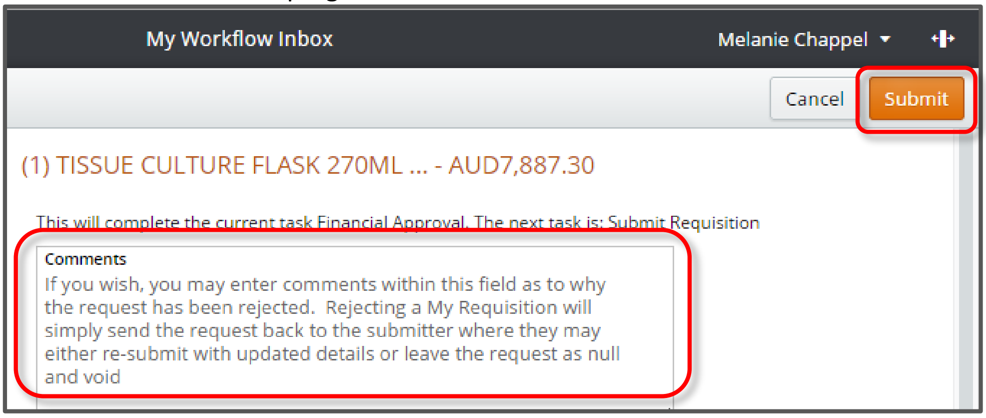


b. **Decline**

i. If, after reviewing the My Requisition details, you wish to Decline the expenditure, click on the drop-down button at the top right of the screen and choose the **Decline** option.



ii. Insert any comments you wish to add (not mandatory) in the **Comments** field, then click on the **Submit** button at the top right of the screen



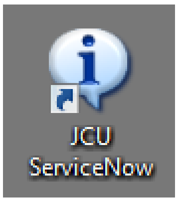
How to Delegate your Approvals before commencing planned absences

The JCU Financial Delegation Policy relates to a position, not to the individual in that position. If the individual holding the position is absent, the power may be exercised and the duty performed by an individual acting in the position.

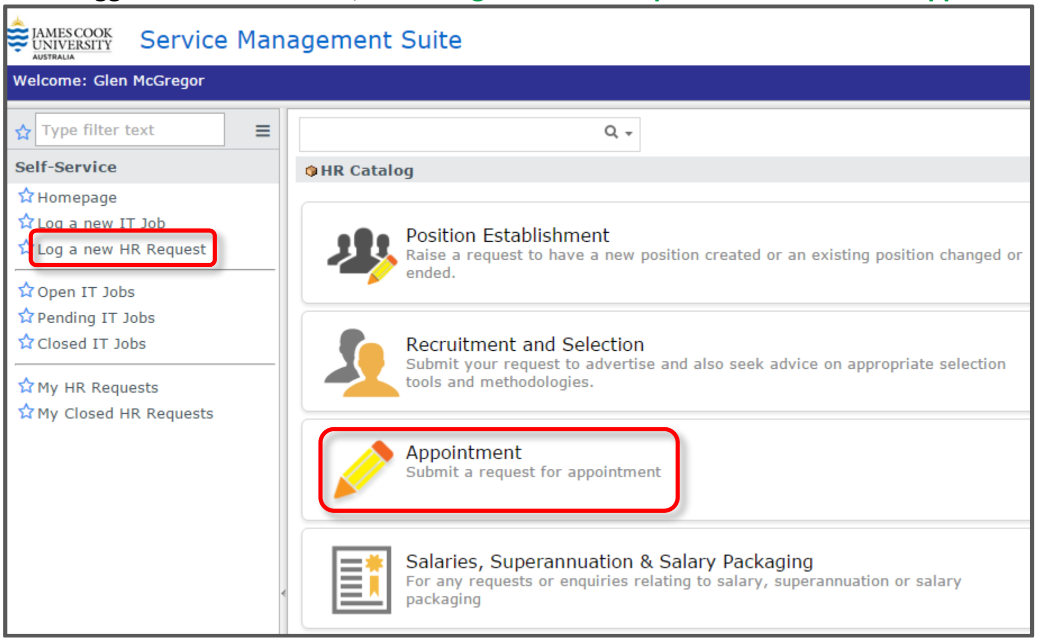
For an individual to be formally acting in a position, the request must be lodged with Human Resources. It is recommended that the request be lodged one week prior to the absence commencing to ensure that the relevant systems are ready in time of the absence.

For more information on the Financial Delegation Policy, please follow the link below:
https://www.jcu.edu.au/policy/procedures/university-delegations/financial-delegations-management-procedure

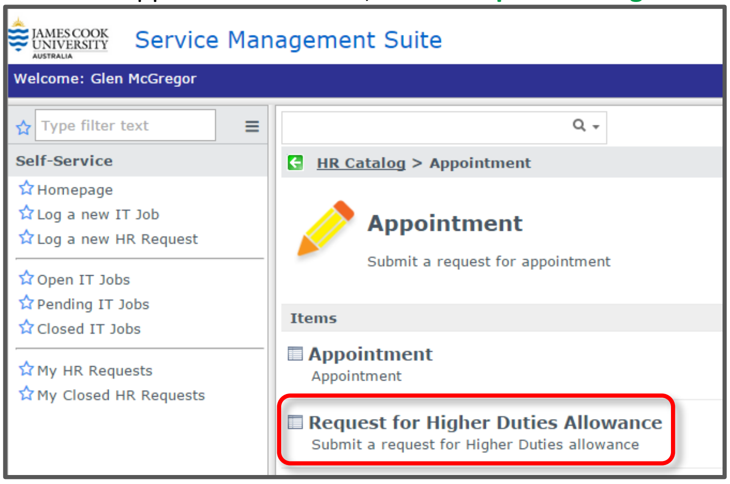
1. To formally lodge a Request to HR to provide an individual Acting Financial Delegation, click on the **JCU ServiceNow** icon found on the Desktop.



2. Once logged into ServiceNow, select **Log a new HR Request** and then select **Appointment**



3. From the Appointment Screen, select **Request for Higher Duties Allowance**



4. From the Submit a request for Higher Duties Allowance screen, click on the link **Request for Higher Duties Form**

5. Complete the Form and have the form signed by a Dean, Director or equivalent. A key aspect of the form is the Acting Options which are:
   - **Higher Duties** – Acting staff member to undertake work at a higher level for a continuous period will be paid at the higher level.
   - **Financial Delegation** – Acting staff member to have the authority of the position to approve financial transactions (including My Requisition Approvals) as per the financial delegation register

Request for Higher Duties & Financial Delegations
Human Resources Directorate

JAMES COOK UNIVERSITY AUSTRALIA

Higher Duties Allowance Guidelines

Adobe Forms Instructions

Higher Duties is paid in accordance with Schedule 2 of JCU Enterprise Agreement 2013-2016

Professional and Technical Staff

- HEWL 2 to HEWL 9 staff: must be for a continuous period of at least 5 working days and is paid as the difference between the salary of the person performing the higher duties and the first incremental point on the higher level.
- HEWL 10 staff: must undertake work at a higher level for a continuous period of more than 10 working days and is paid as the difference between the staff member's ordinary rate and the ordinary rate of the position temporarily filled on a proportionate basis.

Academic Staff

- Work performed at a higher level for a continuous period of more than 20 working days and is paid at the higher level.

Note: Higher duties arrangements do not alter superannuation arrangements.

Staff Member Details:

Name: Joe Blogs   Employee Number: 12345

**If the substantive position is to be vacant for this period and there is subordinate staff or casual staff reporting to the substantive position, please ensure a delegation has been setup for this period in MY HR Online.*

Please select from the options below

Higher Duties and Financial Delegation: ☐ *Higher Duties- No Financial Delegation:* ☐ *Financial Delegation Only:* ☑

Period of Acting Appointment *(Note: Acting appointments should generally not be for longer than 3 months, refer to R&S Best Practice Guide).*

From: 1-Jan-2016   To: 31-Jan-2016

Details of position to be replaced:

Name of staff member being temporarily replaced	Bill Smith
Position Number	6000012345
Position Title	Director, College Operations
HEWL 10 Only: Percentage of Higher Duties payable	NA %
Account Code (If different from current)	NA

Reason for Higher Duties Allowance:

☑ The usual occupant is on leave   ☐ Extension of existing Higher Duties Allowance

☐ Temporary arrangement while position is advertised

☐ Other: (Please specify)

James Cook University | Request for Higher Duties and Financial Delegation v1.0

Approval of Delegated Manager i.e. Dean, Director or equivalent:

I approve this request.

Position Title	Name	Signature

Please submit form via ServiceNow

6. Once the form is complete and approved, go back into ServiceNow and complete the request:
    a. Attachment
    Click the here hyperlink to add the completed and approved form

    b. Opened for
    Type the name of the person this request is being completed for. It defaults to the person logged into Service Now but can be changed

    c. Short Description
    Type in a short description of why the acting request is being submitted.

    d. Long Description
    Type in a long description of why the acting request is being submitted.

    e. Submit
    Once the attachment has been added and the mandatory fields completed, click Submit to formally lodge the acting Request to HR.