JAMES COOK UNIVERSITY AUSTRALIA

MyReq Procedure
General
Expense

How to Create a MyReq Purchase Order

This procedure outlines the process of how to create a new Purchase Requisition to submit and raise a Purchase Order.

Before you start

- Do you have access to RAISE a MyReq? Everyone has access to log in to MyReqs, but only required staff have access to <u>submit</u> a MyReq. (Preferred web browser is <u>Google Chrome</u>)
- Do you have available funds and approval?
- Do you have the required quotes/documentation, or approved Exemption from quote?
- Is the supplier already in the system?
  - Will this purchase be part of a Consultancy agreement? Have you discussed with the Procurement team? (spg@jcu.edu.au)
  - Is the supplier a SOLE TRADER, and have you reviewed the implications of engaging SOLE TRADERS?
  - If not, can an alternative supplier be utilised?
  - If no alternative is available, have you requested the supplier be set up in Service Now?
- Can this be paid by corporate credit card? Restrictions apply to corporate credit card use and should be checked with the corporate credit card team first.

1. Log into CiAnywhere through the **'My Requisitions'** link on the staff homepage. Insert your JC number and password, click **Log On**
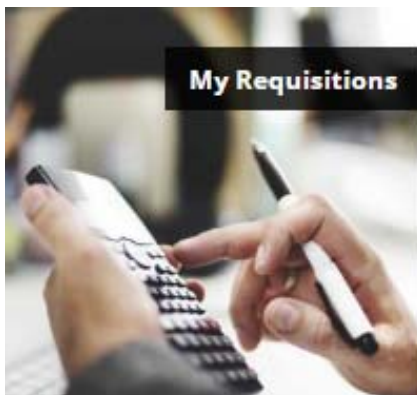
Ci ANYWHERE
ANY DEVICE. ANY WHERE. ANY TIME.

My Requisitions

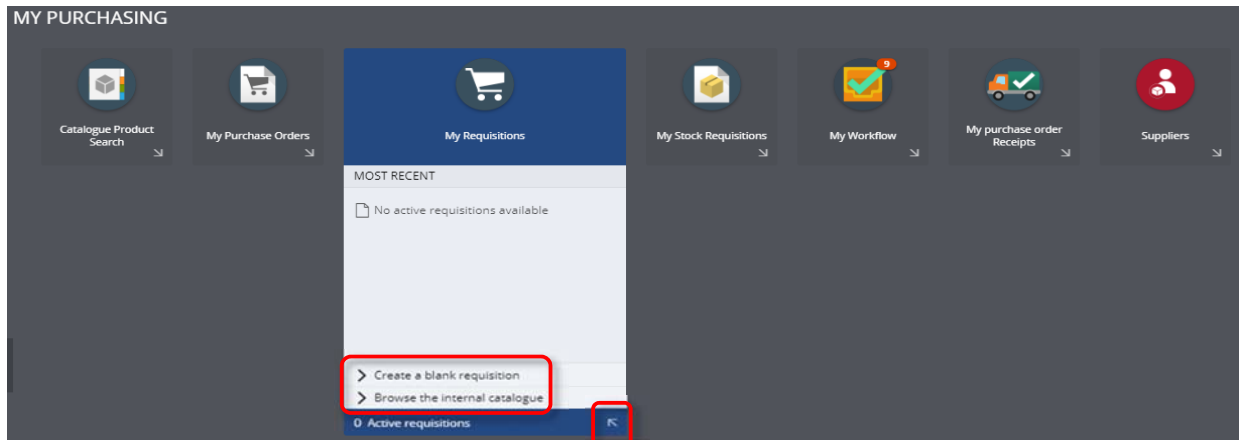Log on using your details

User name or email address
jc136556

Password
••••••••

Log On

☑ Keep me logged on   ☐ Accessibility Mode ⓘ

2. To create a new purchase requisition, click the drop **down arrow under My Requisitions**, then **Create a blank requisition**. If you would like to browse the JCU catalogue (Stores) and raise a JCU stores order, click on **Browse the internal catalogue**.

3. The new requisition will have many fields already set with default information, only change if required. Fields to complete on this first settings page:

Purchasing System & Location	Do not change
Comment	This information is what you would like to see on the purchase order for **reference to the supplier**. You only have a limited space – this should be limited to **QUOTE numbers** etc.
Reference 1 & 2	These fields are for your reference only, they do not appear anywhere on the purchase order.
Date Required	This date is defaulted to be 1 month from entry date, not when the goods/services are required. This date allows us to follow up 1 month from now to make sure the order has been paid and/or goods received.
Purchase order Type	You have the option of a **standard** or **blanket** order. Blanket Orders - The procurement team will determine if a blanket order is the best option or if standard orders should be placed as required. While blanket orders are an estimate they do need to be as accurate as possible. Blanket orders should include your customer account number with the company.
GST Entry Mode	The Purchase Order always has to be raised as **GST INCLUSIVE**, even if the supplied goods/services will be exclusive. The GST rate is selected in the Requested items section.
Exchange Rate	Do not change
End User Details	These field should be for the **END USER**. If you have raised a MyReq for another staff member or student, their name and contact details should be entered. Please make sure a full phone number (not their extension) and email is entered. As the creator of the MyReq, you will also receive a copy of the final purchase order.

4. Once completed, click **Save** in the top right of screen.

Add New Requisition

Add New Requisition

🛒 Requested Items
   0 items

📇 Dissection Summary
   0 dissections

🔄 Authorisation History
   0 items

📎 Attachments
   0 Attachments

∧ **General**

Requisition Type
Requisition

Purchasing System *
MRPU (MyReq Purchasing) ▾

Purchasing Location *
RQPU (MyReq Purchasing) ▾

Comment
Quote - 22557459

Reference 1
Bullen Computer

Reference 2

Date Required *
13-Apr-2019 📅

Purchase Order Type *
Standard ▾

Requisition User
JC136556 (Melissa Bullen) 📇

GST Entry Mode *
Inclusive ▾

☐ Template

∧ **Exchange Rate**

Exchange Rate Table *
JCU_SPOT (JCU Spot Rate) ▾

Exchange Rate Date *
14-Mar-2019 📅

∧ **End User Details**

Name of End User *
Melissa Bullen

Phone / Email *
47814622 melissa.bullen@jcu.edu.au

5. You can add attachments (quotes, emails, screenshots of shopping carts etc) by clicking on the **Attachments** tab in the left hand menu. Click on **+ Add** to **Add from local drive** and find the saved documentation on your desktop (title of document must be short and not include characters, eg *#/). Click **OK**.

6. Click on the **Requested Items** tab in the left hand menu, then click **+ Add** to enter the items you wish to create the purchase order for. You can find items in the JCU store by clicking on **Browse the internal catalogue**, or for all other orders, click on **Ad hoc requests**.

7. Fields to be completed to raise a purchase request are listed below:

Supplier	Start typing the supplier you are looking for, and you can **click on the drop down** when they appear (this will pre-fill their details, please do not change any supplier details). You can also use the **Advance search** option if you cannot find them. If the supplier you are looking for is not listed, please contact procurement@jcu.edu.au with your query. If the supplier is incorrect the order will need to be cancelled and re issued with correct supplier.
Description	This field should reflect the item/service you are ordering. You only have 40 characters and should match details from your quote (including part/item numbers if applicable). If you are ordering catering, the date of the event should be listed on both description lines. **This information is what is listed in Finance One.**
Long Description	The short description will replicate into the long description, but any further information relating to this product should be listed here (not in the comments section below). **This information will appear on the purchase order for the supplier.**
Supplier Product	This field does not reference anywhere on the purchase order and SHOULD BE LEFT BLANK
Comment	This field does not reference anywhere on the purchase order and SHOULD BE LEFT BLANK
Goods/Service	Select whether your item is a **goods** or a **service** (eg, 250 printed flyers are goods, whilst the design of the flyers is a service).
Due Date	The date you require the goods/service. This will default to 1 month from the purchase requisition entry date, but if you require your goods/service on a particular date, enter that date (eg, event date for catering delivery).
GST Rate	Check items have GST included or not. Generally you should have this information on the quote. If the item is GST free, this field will be NA (eg, International supplier). If the supplier is domestic, but quote is GST exclusive, check if these items WILL include GST upon invoicing. Many suppliers quote GST exclusive amount, you will have to adjust your purchase value to include the GST amount.
Quantity	The **quantity** of goods/services to receive. If you require 10 items to be ordered, the quantity should be 10, not 1. This is very important for the Accounts Payable team to be able to invoice match to correct purchase order details.
Unit Name	Leave as 'ONLY'
Unit Amount	Total amount (GST inclusive if applicable) for 1 item (MyReqs will calculate the total for the quantity you enter).
Delivery Point Type	When you are set up with MyReq access, financial systems should set a default delivery point and type. Otherwise type should be **JCUMYREQ**, and the delivery point can be selected from the buildings/rooms set in the system.
Office Use Only	Do not change
Restricted Drugs & Poisons	Do not change unless spoken to procurement officer
JCU Assets	Do not change unless spoken to procurement officer
Charge Type and Code	Do not change
Ledger	Will default to current 2019 ledger. Only change if you require the item to be expensed in different year (eg, milestones over multiple years).
Account	This is the account/OPF you will be charging for your purchase. The **use code** will also need to be entered relevant to the purchase. If unsure on use code, look through the Advance search option, locate the use code listing on the procurement webpage, or contact the procurement team.

Submit Requisition →

Requisition (0200112306) ↔ ⤳
0 items, Total (Inclusive) AUD 0.00

MyReq Purchasing ↔
Created by Melissa Bullen

📋 **Requisition**
Status Entered

← Requested Items ⟩

Add New Requested Item   Cancel   **Save**   →

🛒 **Requested Items**
0 items

∧ Supplier

📑 **Dissection Summary**
0 dissections

Supplier *			
Dell		⊗	▾
Supplier	**Description**	**Postcode**	**City**
DELL 00	DELL COMPUTER P/L	1044	SYDNEY
FALMAC01	Fallsdell Machinery Pty Ltd	1885	Banksto
GRAINT01	GRASSHOPPER INTERNATIONAL	05001	MEDELL
NORPOI00	North Point Media	4818	BURDEL
NQHOSE00	NQ HOSEWORKS	4818	BURDEL
NQUT 00	N.Q.U.T PTY LTD	4818	BURDEL
PERINT00	PERIODONTICS INTERNATIONAL PTY LTD	4818	BURDEL

⚙ **Settings**
MyReq Purchasing purchasing locat...
Required 13-Apr-2019

✅ **Authorisation History**
2 items

📎 **Attachments**
1 attachment

▤ Advanced search

Submit Requisition →

Requisition (0200112306) ↔ ⤳
0 items, Total (Inclusive) AUD 0.00

MyReq Purchasing ↔
Created by Melissa Bullen

📋 **Requisition**
Status Entered

← Requested Items ⟩

Add New Requested Item   Cancel   **Save**   →

🛒 **Requested Items**
0 items

∧ **Supplier**

📑 **Dissection Summary**
0 dissections

Supplier *
DELL 00 (DELL COMPUTER P/L)   ▾

Supplier Ledger	Account
CG (Creditors General)	DELL .00 (DELL COMPUTER P/L)

Currency
AUD (Australian Dollar)

Address
010 (Supplier Purchase Orders)   ▾

⚙ **Settings**
MyReq Purchasing purchasing locat...
Required 13-Apr-2019

∧ **Item**

Line Type
Non-stock

✅ **Authorisation History**
2 items

Description *
Latitude 7920

Long Description
Latitude 7920 Silver

📎 **Attachments**
1 attachment

Comment

Goods/Service *	Due *	GST Rate *
Goods	13-Apr-2019 📅	C (Current Rate) ▾

Quantity	Unit Name *
2.0000	ONLY ▾

Unit Amount (Inclusive)	Line Amount (Inclusive)
1,125.0000	2,250.000000

Delivery Point Type *	Delivery Point *
JCUMYREQ (All JCU MY Req... ▾	TSV 01 A (TOWNSVILLE Bld ... ▾

8. Once complete, click **Save and Add,** or **Save** in the top right corner (**see 2 below points**).

9. If quote includes multiple items, rather than add each line from scratch, you can click on the **dropdown arrow BEFORE** you save, then select **Save and Add**. You will then need to enter the item details, but you don't have to enter all fields again. Repeat steps above until all items are entered.

   ***Don't forget to include a shipping/freight line (use code 8460) if goods are to be delivered (this should be on the quote).

10. Alternatively, if you have multiple lines that are mostly identical, you can opt to 'duplicate' them (this will be an underline exact duplicate of the previous line). Click **Save** instead of Save and Add, then click the **Down Arrow** in the bottom right corner of the line, **Create Duplicate**. You will then need to **Edit** this line's fields where required.

11. Once happy with entire purchase requisition, click **Submit Requisition** in top left of screen.
If you have specific comments for the procurement team regarding your purchase order, leave comments in the comments box, then click **OK** (eg, please do not send PO to supplier, only send to end user).

Contact Strategic Procurement Group

Annual Spend Over $200,000 Or Consultancy

Require Goods or services

My Requisitions
Create Requisition

Quotes

Procurement Team Review

Is a restricted Drug or Poison?

NO

YES

Financial Delegation Approval (1. Expenditure)

Purchase order

One Off Low Value < $1,000

Refer to:
FMPM 420 Corporate Credit Card Policy
FMPM 421 Corporate Credit Card

Use Corporate Credit Card

Restricted Drugs and Poisons Review

Refer to:
HSE21 Drugs & Poisons Standard