CIAnywhere Procedure

JAMES COOK UNIVERSITY AUSTRALIA
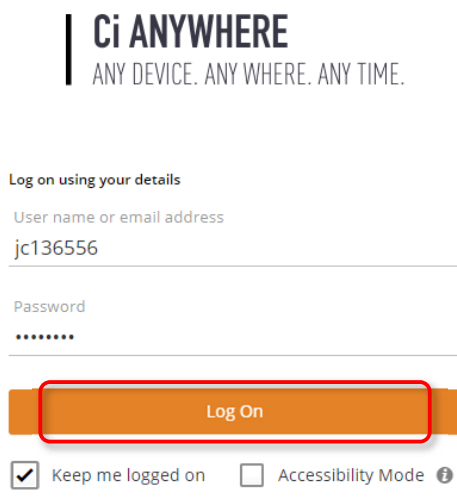
General
Expense

How to Create a CIAnywhere 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 Requisition? Everyone has access to log in to CIAnywhere, but only required staff have access to submit a Req. (Preferred web browser is Google Chrome)
- 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/ procurement@jcu.edu.au)
    - Is the supplier a SOLE TRADER, and have you reviewed the implications of engaging SOLE TRADERS?
    - Can a 'preferred supplier' or an alternative already set up 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 **'CIAnywhere'** link on the staff homepage. Insert your JC number and password, click **Log On**

Ci ANYWHERE
ANY DEVICE. ANY WHERE. ANY TIME.

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** (JCU Stores orders can start from here too). If you would like to browse the JCU catalogue (Stores), click on **Catalogue Product Search** (you can also raise a store order from here).
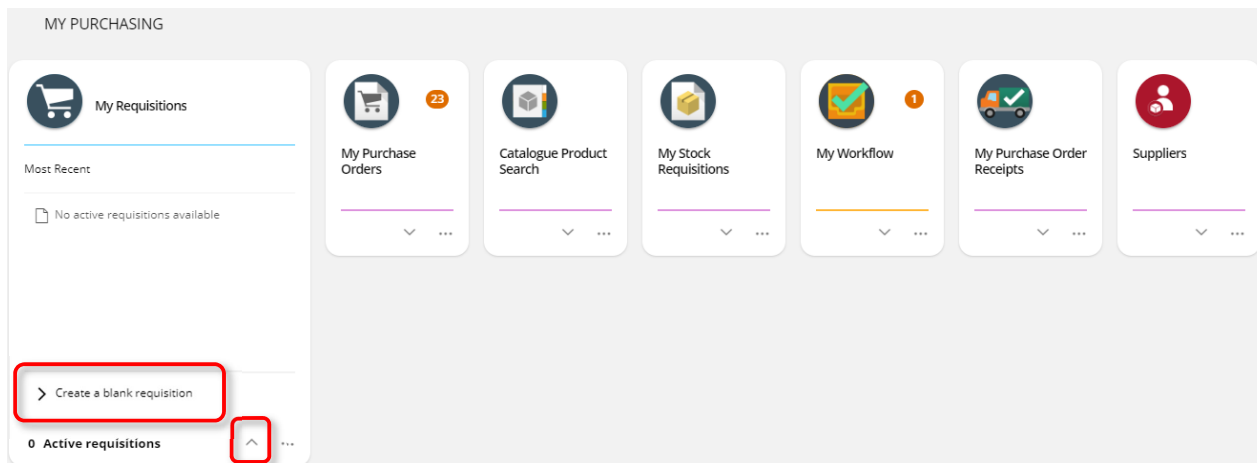
3. The new requisition will have many fields already set with default information, only change if required. Fields to complete on this first settings page:

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 (optional fields, not required).
Purchase order Type	You have the option of a **standard** or **blanket** order. Blanket Orders – you can discuss with the procurement team if a blanket order is the best option, or if standard orders should be placed as required. While blanket orders are an estimate of yearly expenditure, they do need to be as accurate as possible and follow the same monetary caps of the procurement policy (ie, if value is expected over $10k, multiple quotes/EFQ required).
GST Entry Mode	The Purchase Order 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.
Date Required	This date is currently defaulted to be 1 month from entry date. This date allows us to follow up 1 month from now to make sure the order has been paid and/or goods received. If you know your goods/service will not be fulfilled for some time, you can update this field to reflect the correct date the order will be completely fulfilled.
Exchange Rate	Do not change
End User Details	These fields should be for the **END USER**. If you have raised a Requisition 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 Requisition, 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

Requested Items
0 items

Costing Summary
0 dissections

Authorisation History
0 items

Attachments
0 Attachments

Add New Requisition

General

Purchasing System *
MRPU (MyReq Purchasing)

Purchasing Location *
RQPU (MyReq Purchasing)

Requisition User
Melissa Bullen

Comment
Quote - 123456789

Reference 1
Bullen Computer

Reference 2

Purchase Order Type *
Standard

Priority *
Normal

GST Entry Mode *
Inclusive

Date Required *
29-Jul-2021

☐ Template

Exchange Rate

Exchange Rate Table *
JCU_SPOT (JCU Spot Rate)

Exchange Rate Date *
29-Jun-2021

End User Details

Name of End User *
Melissa Bullen

Phone / Email *
47814622 melisa.bulen@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, or you can **drag and drop** straight into the free space. 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 request**.

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

Supplier	Enter the ABN of the supplier you are looking for, and you can **click on them in the drop down** when they appear (this will pre-fill their 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 <u>match details from your quote</u> (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, and visible to AP when invoice matching.**
Long Description	The description will replicate into the long description field, 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 is relevant for Store/catalogue orders. Otherwise can 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, computer monitor is a goods, whilst the delivery is a service).
Due Date	The <u>date you require the goods/service</u>. 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	<u>Check items have GST included or not</u>. 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	<u>Total amount (GST inclusive if applicable) for 1 item</u> (CIAnywhere will calculate the total for the <u>quantity</u> you enter).
Delivery Point Type	When you are set up with CIAnywhere access, financial systems will set a default delivery point and type. Otherwise the <u>delivery point can be selected from the buildings/rooms set in the system</u>.
Contract Details, and Office use only	These fields do not require completion, except the 'JCU Contract ID' field under 'Office Use Only'. If your purchase is related to a JCU Contract, please enter the 6-digit number and nothing else.
JCU Assets	Do not complete unless you know you are purchasing an asset (Procurement can assist).
Restricted Drugs & Poisons	Do not complete unless you know you are purchasing a Restricted product (Procurement can assist).
Ledger	Will default to current year ledger. Only change if you require the item to be expensed in different year (eg, milestones over multiple years) – '00' is current year.
Account	This is the <u>account/OPF you will be charging for your purchase</u>. 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 for assistance.

Requested Items
1 item

Costing Summary
1 dissection

Settings
MyReq Purchasing purchasing locat...
Required 07-Aug-2021
Entered

Addresses
PROCUREMENT JCU
Bldg 1, Lvl 2 Rm 226
101 Angus Smith Drive
Townsville Qld 4811
Australia

Authorisation History
2 items

Attachments
1 attachment

← **Requested Items**

TESTING Mel Bullen Computer

∧ Supplier : DELL COMPUTER P/L - ABN(46003855561)

Currency
AUD (Australian Dollar)

Supplier *
DELL 00 (DELL COMPUTER P/L)

Supplier Ledger
CG (CREDGEN)

Supplier Account
DELL .00 (DELL COMPUTER P/L)   View Details

Address
010 (Supplier Purchase Orders)

∧ Item : TESTING Mel Bullen Computer

Description *
TESTING Mel Bullen Computer

Long Description
TESTING Mel Bullen Computer

Supplier Product

Comment

Goods / Service *	Due *	GST Rate *
Goods	07-Aug-2021	C (Current Rate)

Quantity	Unit Name *
2	ONLY

Unit Amount (Inclusive)	Line Amount (Inclusive)
2000	4,000.00

Delivery Point Type *	Delivery Point *
JCUMYREQ (All JCU MY Req...	TSV 142A (TOWNSVILLE BI...

Purchase Type *
General Purchase

∨ Contract Details

∧ JCU Assets

Asset Number (Procurement Use Only)

Asset Expected Life (Years).
0

Asset Primary Storage Location.

Asset Responsible Officer

How will the asset be replaced?
NA (Not Applicable)

∧ Office Use Only

JCU Contract ID

Payroll Tax Exemption Applies
YES_GOOD (Yes - Goods Only)

∧ Restricted Drugs and Poisons

Will this item be used for therapeutic purposes?
NA (Not Applicable)

∧ Cost Accounts

🔍 ❯ 1 - 1 of 1 record.   🖨 ⋯

	Dissection Number	Charge Type	Charge Code	Ledger	Account	Account Description	GST Rate	Dissection Amount (Inclusive)
☐	1	DEFAULT	STKRQN	00	1420.11100.0001.8140	Financial & Bus. FA...	C	0.00

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).
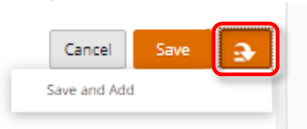
10. Alternatively, if you have multiple lines that are mostly identical, you can opt to 'duplicate' them (this will be an exact duplicate of the previous line). Click **Save** instead of Save and Add, then click the **Down Arrow** in the bottom right corner of the line, **Create Duplicate**. You will then need to **Edit** this line's fields where required.
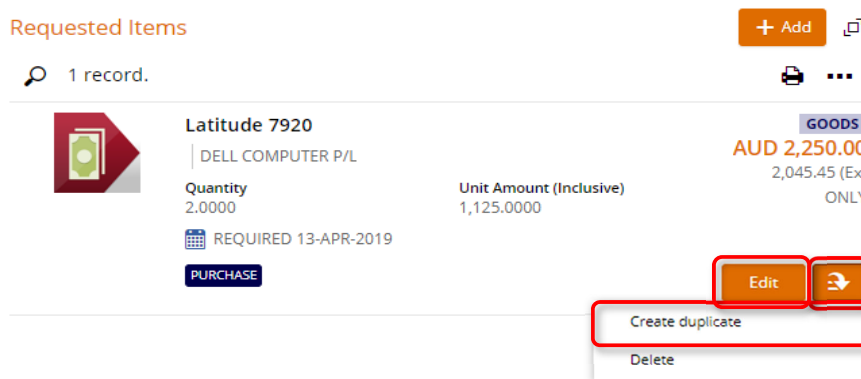
11. Once happy with entire purchase requisition, click **Submit Requisition** in top left of screen.
    If you have specific comments for the procurement team regarding your purchase order, leave comments in the comments box, then click **OK** (eg, please do not send PO to supplier, only send to end user).

Contact Strategic
Procurement Group

Annual Spend Over $200,000
Or Consultancy

Require
Goods or
services

One Off Low Value
< $1,000

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

Use Corporate
Credit Card

Create
Requisition

Quotes

Procurement Team
Review

Is a restricted Drug or
Poison?

NO

YES

Restricted Drugs and
Poisons Review

Refer to:
HSE21 Drugs & Poisons
Standard

Financial Delegation Approval
(1. Expenditure)

Purchase order