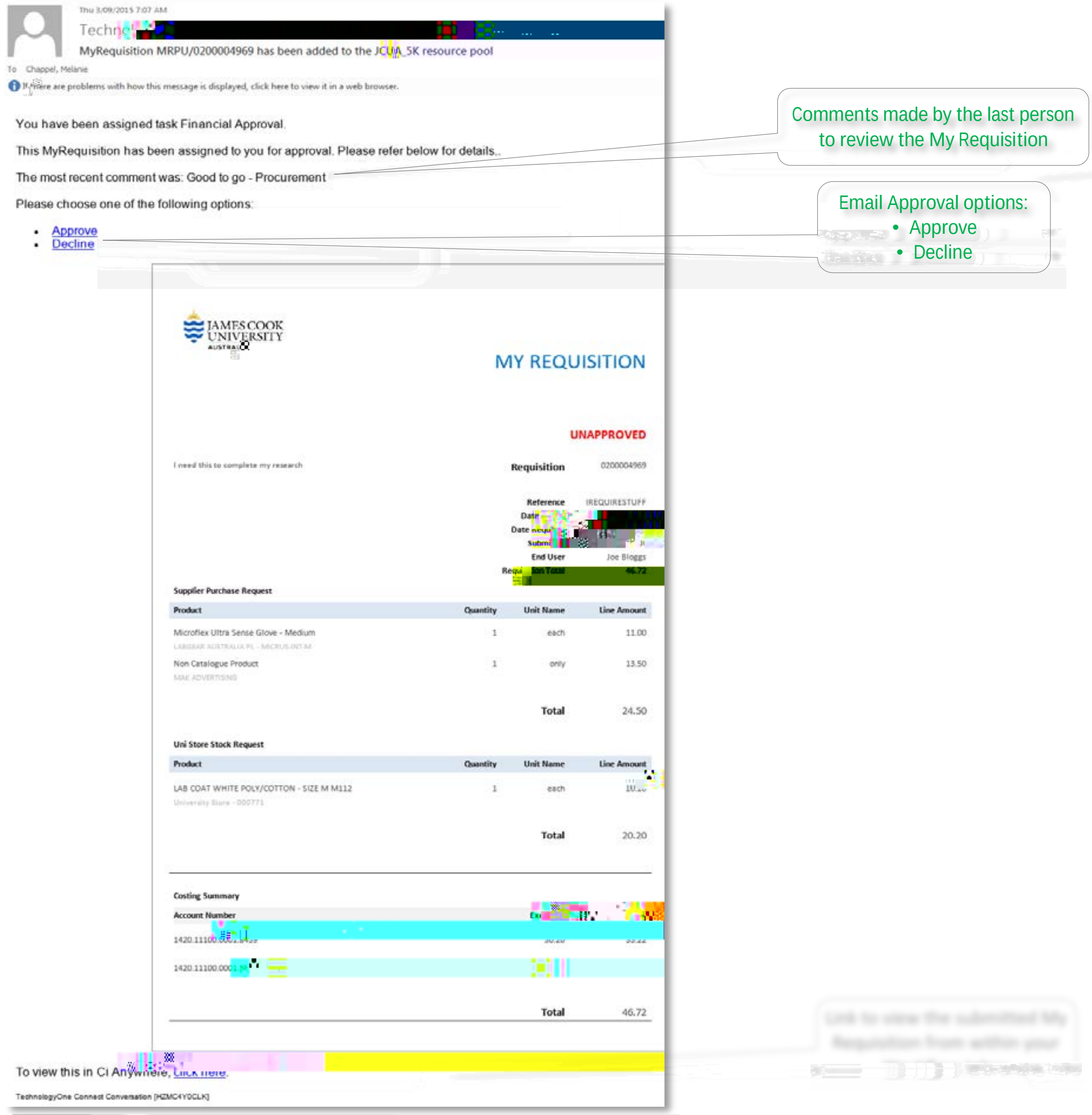
Finance One My Requisitions Procedure

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)

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.



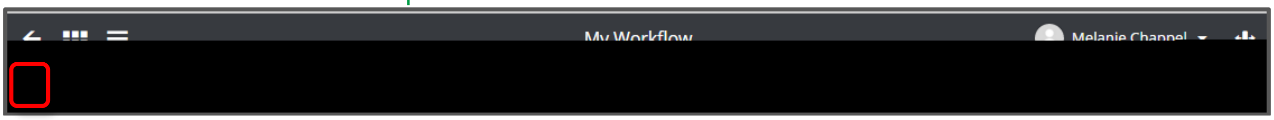
b.

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

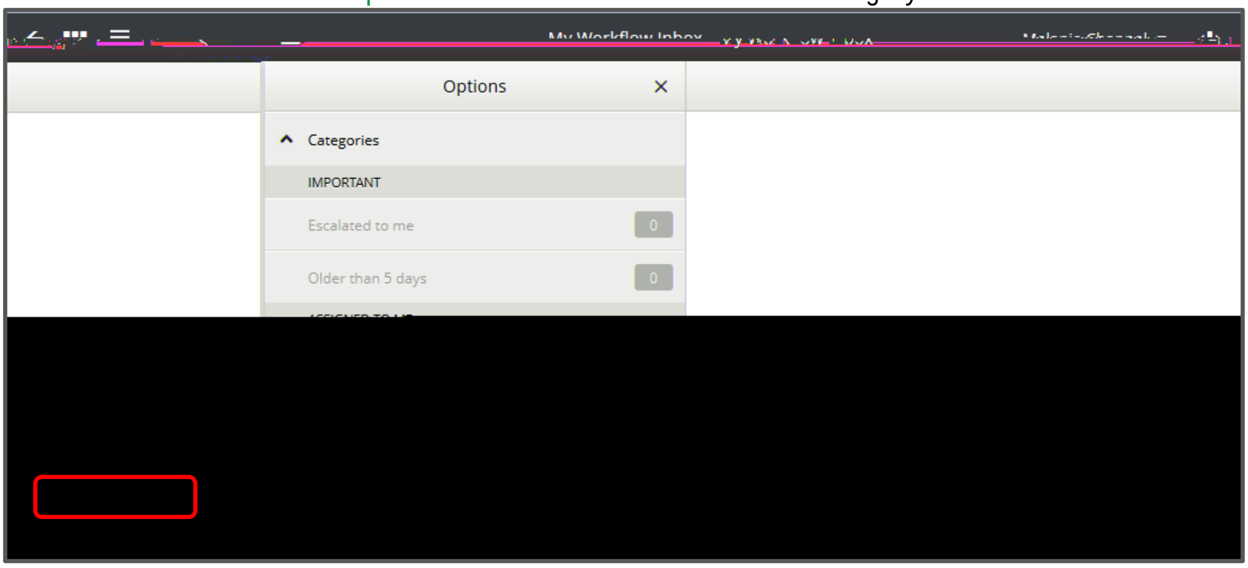
3. Log into Ci Anywhere by entering in your Login ID in the **User Name** field and enter your usual PC login password in the **Password** field then click on **Log on**.

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.

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.

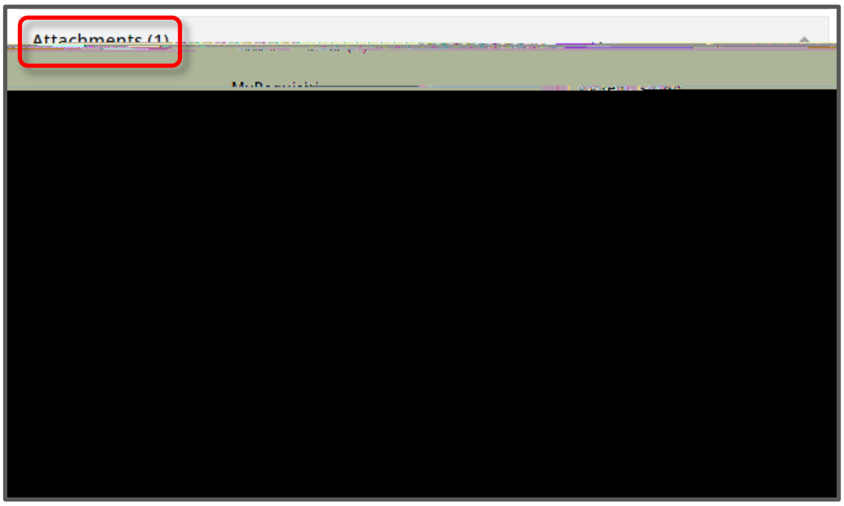
iii. Priority
This is the Priority level the submitter has indicated that the full order be given. Choices for this selection are Normal, High, Urgent and Emergency.

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 0 11.04 (h)2g0.009(m)]pprover as an opportunity to add additional attachments or notes if
The Approver can either drag-and-drop or use the Add icon to add Files, Notes or a URL.

e. **Process View**

f. **Workflow Information**

i. Item

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

ii.

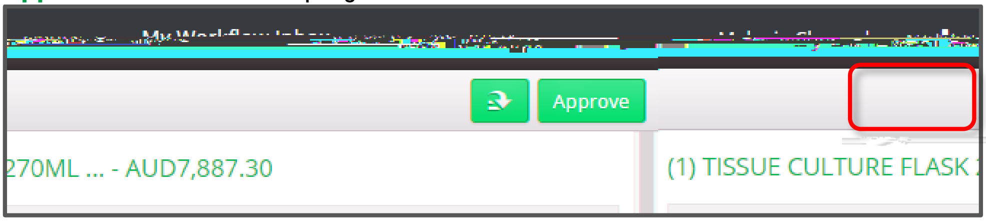
vi. My Requisition Keys
This is simply the Purchasing Location combined with the My Requisition Number.

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

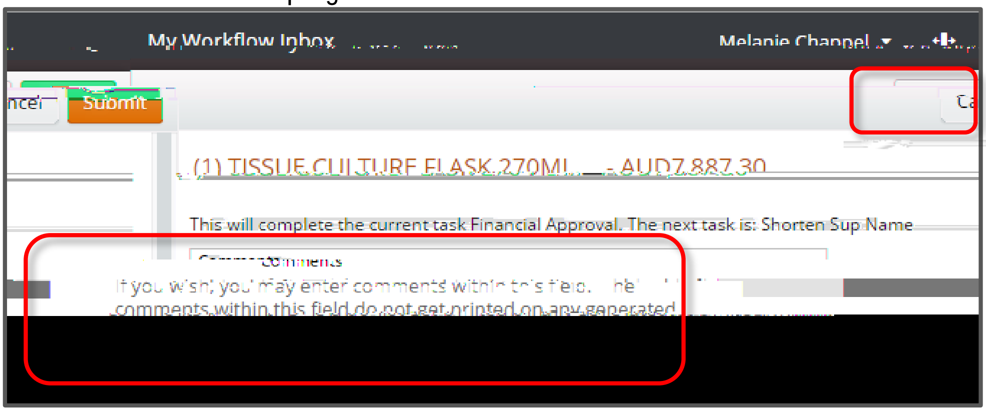
9. Approval Options:

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.

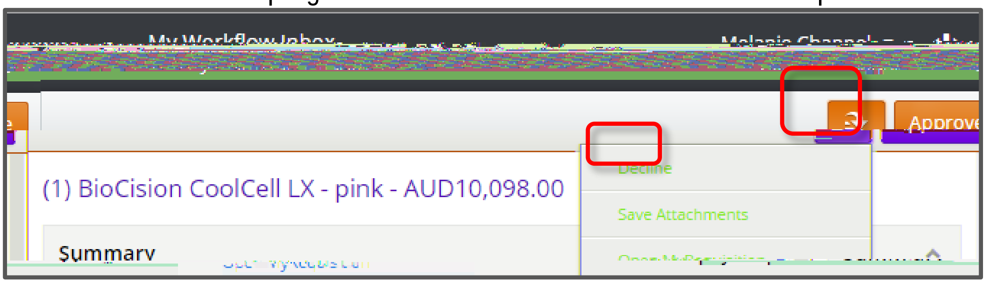


ii. Insert any comments you wish to add (not mandatory) in the **Comments** field, then click on the **Submit** button at the top right of the screen

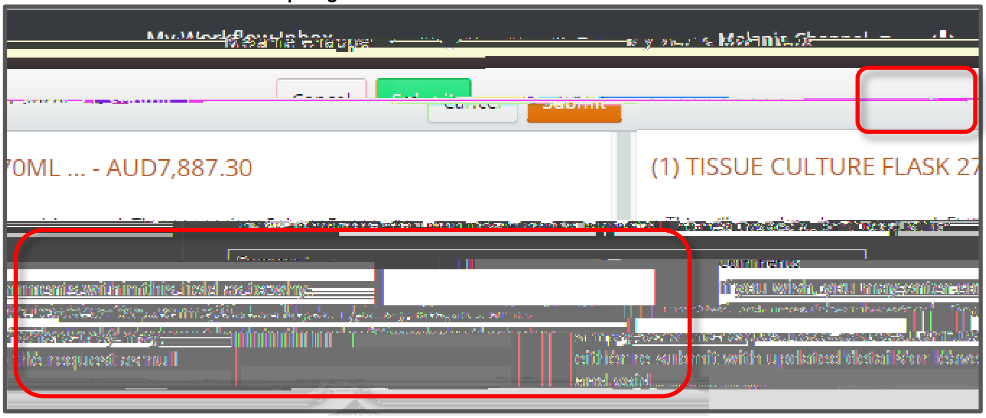


b. **Decline**

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



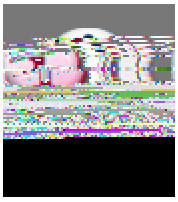
How to Delegate your Approvals before commencing planned absences

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.

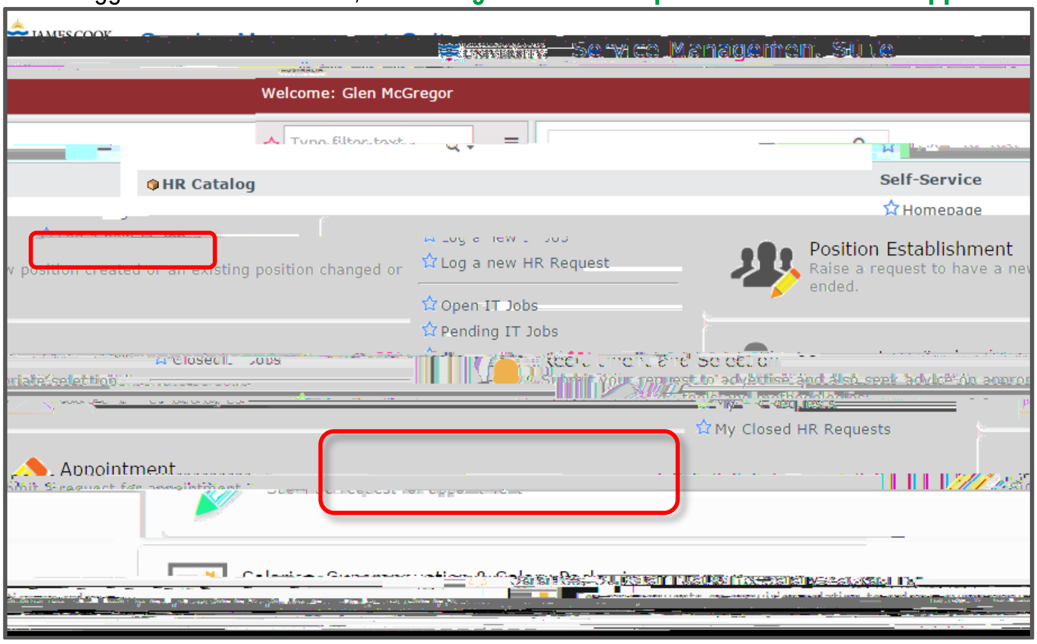
For an individual to be formally acting in a position, the request must be lodged with Human Resources. It is recommended that the request be lodged one week prior to the absence commencing to ensure that the relevant systems are ready in time of the absence.

For more information on the Financial Delegation Policy, please follow the link below:
h

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 orm transactions (including My Requisition Approvals) as per the financial delegation register me6c 0.2BC (FiJ-F10358Fj/TT Tw6C E2MC 0 j0c 18.038 0 Td Tw6C /2 /L7 Tve)endthe