

## How to Create a My Requisition Template

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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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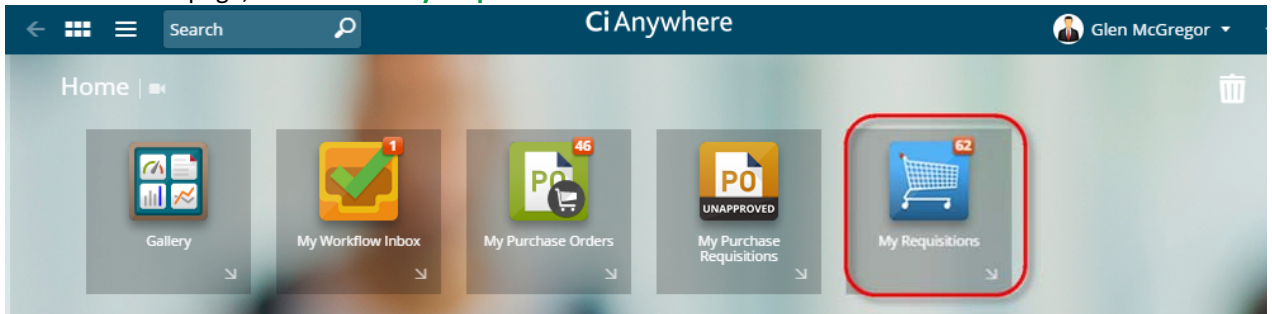
### Create a My Requisition Template with prepopulated fields

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**

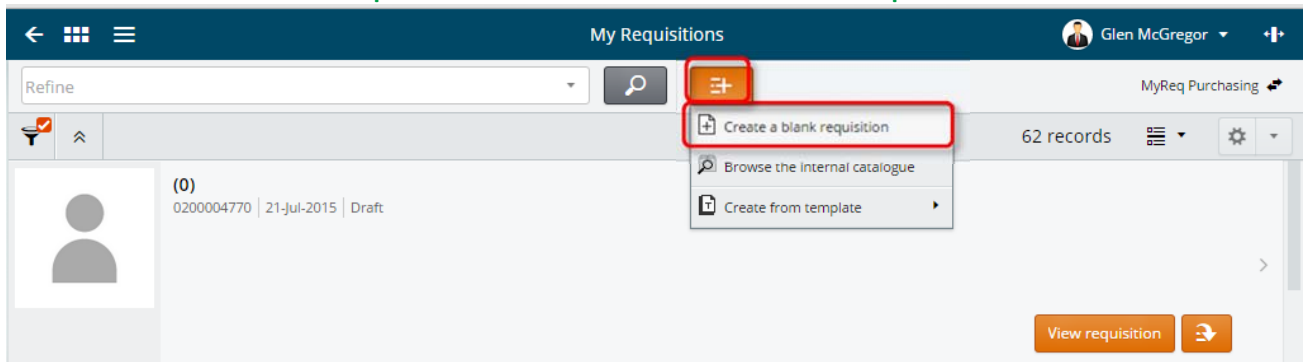


The image shows the Ci Anywhere login interface. At the top, it says "Ci Anywhere" and "Any device. Any where. Any time." Below this, there are options to "Log on with" social media icons (Google+, Facebook, LinkedIn, etc.) and "Or log on with your user name". The "User name" and "Password" fields are 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**

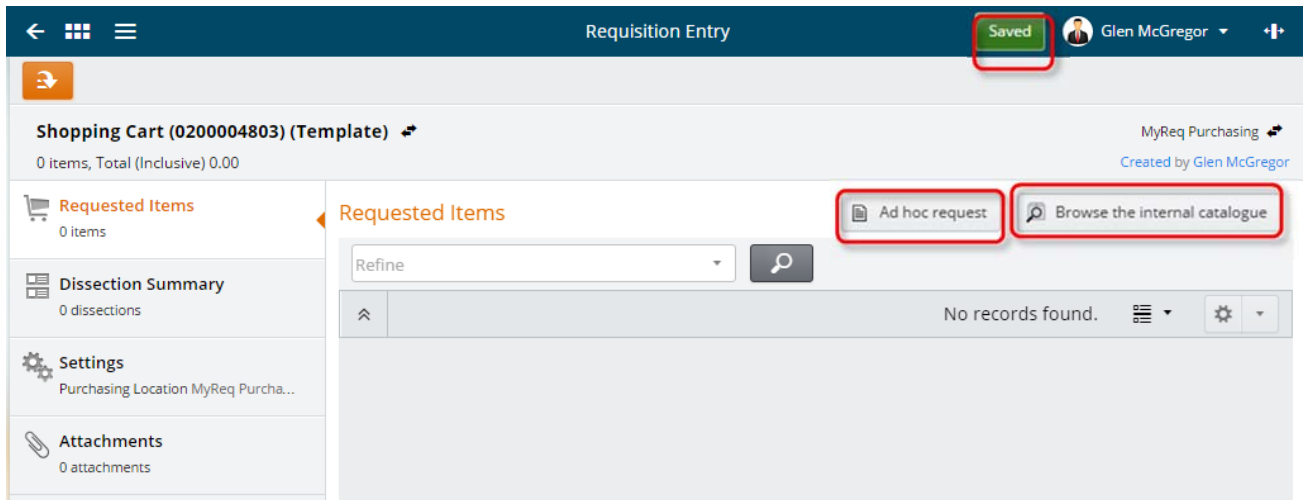


4. Once the Requisition Entry Screen appears, tick on the **Template** checkbox. Enter a **Template Name** e.g. "GlenMcGregorDefaults".  
If you would like to record the End User Details in the template so they are prepopulated, you can enter them in the **Name of End User** and the **Phone / Email**.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

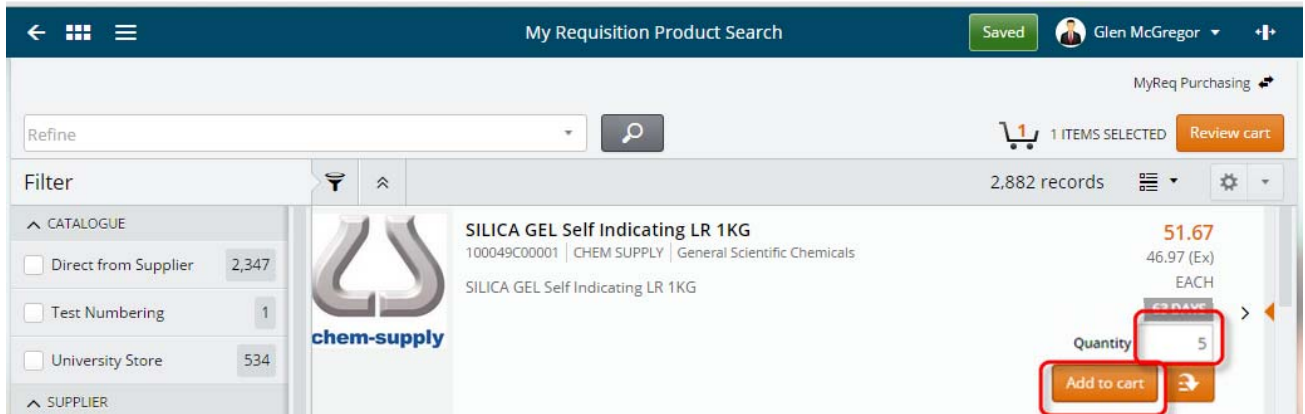
The screenshot shows the 'Requisition Entry' form. The form is titled 'New Requisition' and has a 'Cancel' button and a 'Save' button. The form is divided into two main sections: 'General' and 'End User Details'.  
**General Section:**  
- Purchasing System: MRP (MyReq Purchasing)  
- Purchasing Location: RQPU (MyReq Purchasing)  
- Comment: (Empty text area)  
- Reference 1: (Empty text field)  
- Reference 2: (Empty text field)  
- Date Required: 28-Jul-2015  
- Purchase Order Type: Standard  
- Requisition User: Glen McGregor  
- GST Entry Mode: Inclusive  
-  Template  
- Template Name: GlenMcGregorDefaults  
**End User Details Section:**  
- Name of End User: Glen McGregor  
- Phone / Email: 4781 5659 - glen.mcgregor@jcu.edu.au

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

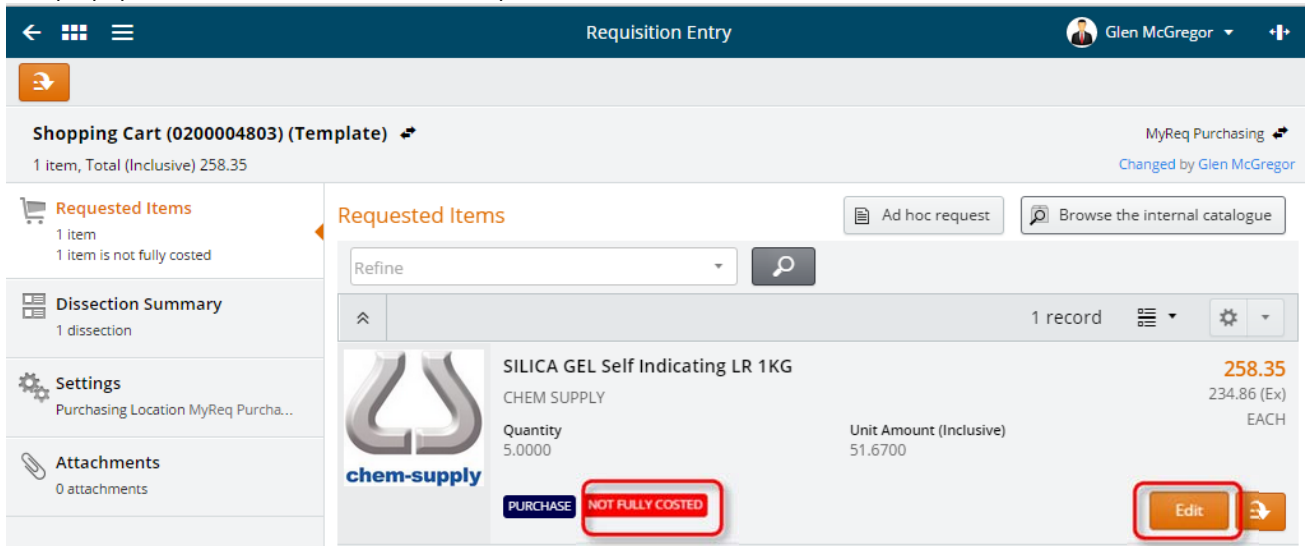
If you have frequent purchases for the same product and supplier, you can also add these items to the template. To add an item to the template click the **Ad hoc Request** button or the **Browse the internal catalogue**



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**

The screenshot shows the 'Requested Items' section of a shopping cart. The 'Cost Account' section is expanded, and the 'Account' field is highlighted with a red box. The account number is '@@@@.@@@@.@@@@.8432'. Other fields in the 'Cost Account' section include 'Ledger Code' (00 (015A)) and checkboxes for 'Apply Cost Account To All Lines' and 'Add Another Cost Account'. The 'Supplier' section shows 'CHEM SUPPLY' and 'CHEMSU.00 (CHEM SUPPLY)'. The 'Office Use Only' section has a 'JCU Contract ID' of 40. The 'Restricted Drugs and Poisons' section has a dropdown set to 'N (No)'. The 'Requested Items' section shows 1 item, with 1 item not fully costing. The 'Dissection Summary' section shows 1 dissection. The 'Settings' section shows 'Purchasing Location MyReq Purcha...'. The 'Attachments' section shows 0 attachments. The 'Shopping Cart (0200004803) (Template)' header shows 1 item, Total (Inclusive) 258.35. The 'MyReq Purchasing' header shows 'Changed by Glen McGregor'.

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

The screenshot shows the 'Requested Items' section of a shopping cart. The 'Cost Account' section is expanded, and the 'Account' field is highlighted with a red box. The account number is '1420.11100.0001.8432 (Services Divisi)'. Other fields in the 'Cost Account' section include 'Ledger Code' (00 (015A)) and checkboxes for 'Apply Cost Account To All Lines' and 'Add Another Cost Account'. The 'Requested Items' section shows 1 item, with 1 item not fully costing. The 'Dissection Summary' section shows 1 dissection. The 'Settings' section shows 'Purchasing Location MyReq Purcha...'. The 'Attachments' section shows 0 attachments. The 'Shopping Cart (0200004803) (Template)' header shows 1 item, Total (Inclusive) 258.35. The 'MyReq Purchasing' header shows 'Changed by Glen McGregor'. The 'Save' button is highlighted with a red box.

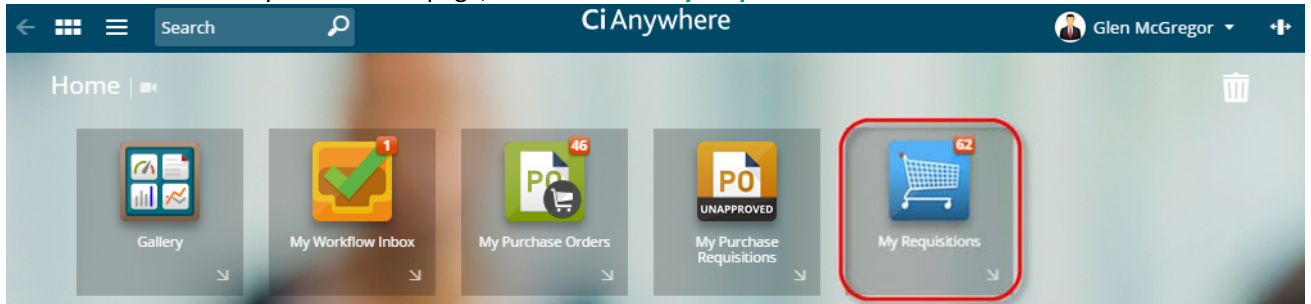
This item with a default account code has now been saved to the template. The Requisition Number also has the word **Template** listed to clearly indicate this is a template. You can add additional items to the template.

The screenshot shows a web interface for 'Requisition Entry'. At the top, there is a navigation bar with a 'Saved' button and a user profile for 'Glen McGregor'. Below this, the main header displays 'Shopping Cart (0200004803) (Template)' with a red box around the word 'Template'. To the right of the header, it says 'MyReq Purchasing' and 'Changed by Glen McGregor'. The left sidebar contains a menu with 'Requested Items' (1 item), 'Dissection Summary' (1 dissection), 'Settings' (Purchasing Location MyReq Purcha...), and 'Attachments' (0 attachments). The main content area is titled 'Requested Items' and features a search bar with 'Refine' and a magnifying glass icon. Below the search bar, there is a list of items. The first item is 'SILICA GEL Self Indicating LR 1KG' from 'CHEM SUPPLY'. It has a quantity of 5.0000 and a unit amount of 51.6700. The total price for this item is 258.35, with a unit price of 234.86 (Ex) per 'EACH' unit. There is a 'PURCHASE' button and an 'Edit' button with a refresh icon next to it.

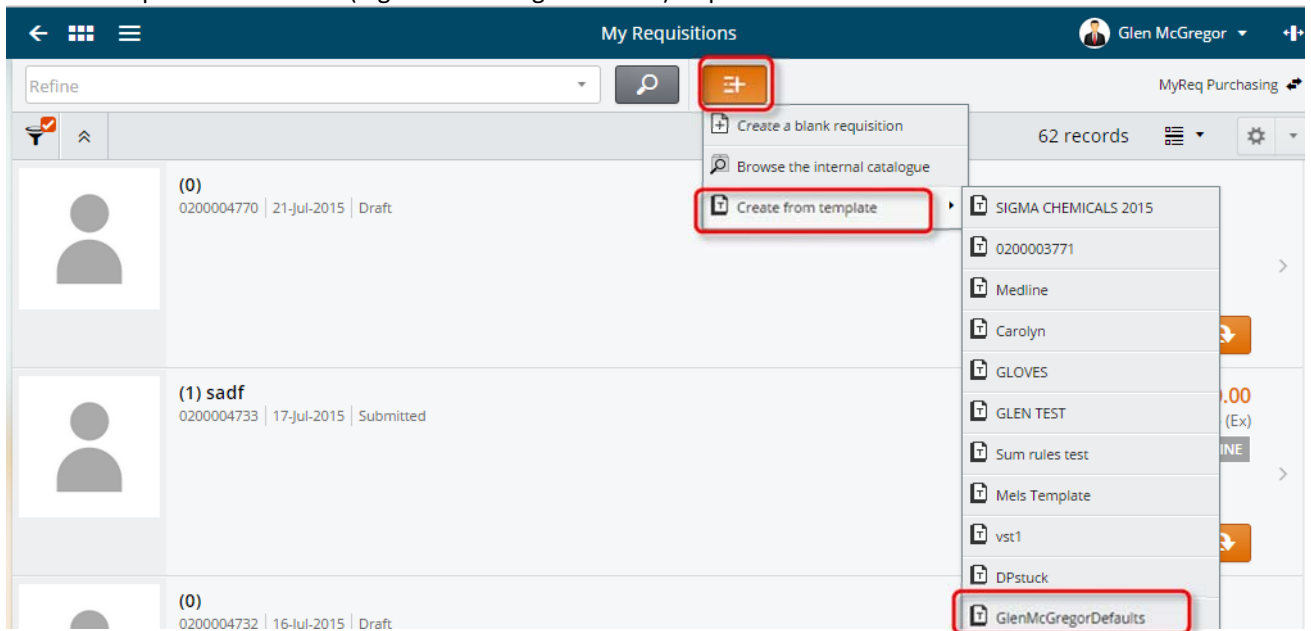
See step 2 below on how to create a requisition from a template

## 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**.

The screenshot displays the 'Requisition Entry' interface. At the top, there is a navigation bar with a back arrow, a menu icon, and the user's name 'Glen McGregor'. Below this is a prominent orange button labeled 'Submit for Approval'. The main content area is titled 'Shopping Cart (0200004804)' and shows '1 item, Total (Inclusive) 258.35'. A sidebar on the left contains navigation links for 'Requested Items' (1 item), 'Dissection Summary' (1 dissection), 'Settings' (Purchasing Location MyReq Purcha...), 'Authorisation History' (2 items), and 'Attachments' (0 attachments). The main area shows a search bar with 'Refine' and a magnifying glass icon. Below the search bar, there are buttons for 'Ad hoc request' and 'Browse the internal catalogue'. The item list shows one record for 'SILICA GEL Self Indicating LR 1KG' from 'CHEM SUPPLY'. The item details include a quantity of 5.0000 and a unit amount of 51.6700. The total price is 258.35, with an excluded amount of 234.86 (Ex). The unit is 'EACH'. There is a 'PURCHASE' button and an 'Edit' button with a refresh icon.

Requested Items	Quantity	Unit Amount (Inclusive)	Price	Unit
SILICA GEL Self Indicating LR 1KG	5.0000	51.6700	258.35	EACH