

Guide for raising Purchase Orders in Tech One CiA Financials

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1. Important information to consider before raising a Purchase Order

Please ensure the below criteria is read and adhered to when purchasing goods:

- Any purchases above \$20,000 **must** have a Purchase Order. Below \$20,000 should have a Purchase Order.
- Create new Purchase Orders for new contracts.
- Do not extend Purchase Orders.

Ensure Quotes are obtained as per the below rules:

- 2 quotes required for above \$7,500;
- 3 quotes for \$15,000 – \$100,000;
- Above \$100,000 is Acquisition Plan
- or exemption from quote needs to be completed and retained for auditing purposes

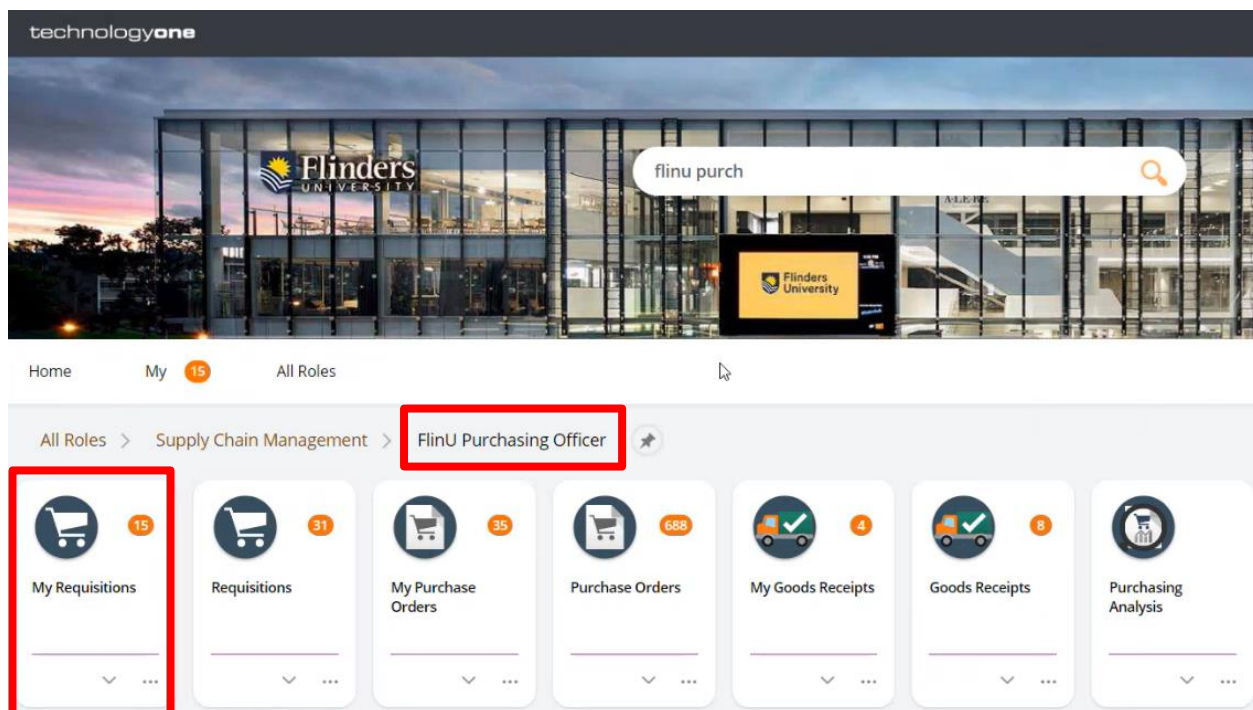
To find out further information in relation to Purchase Order exemptions or to refer to the Purchasing Policy, please click [here](#).

2. How to Create a Purchase Order

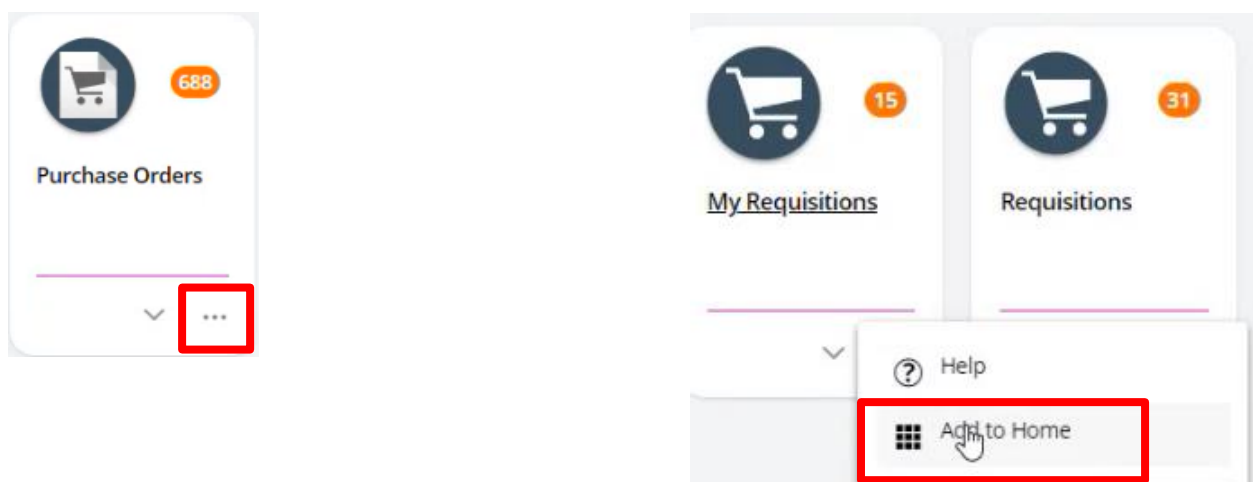
The following steps apply to creating PO for **all areas, including IDS and PFD**.

Creating a Requisition

Click on the **My Requisitions** tab within the *FlinU Purchasing Officer* role in TechOne.



NOTE: You can add a commonly used tile to your TechOne Home screen by clicking on the three dots at the bottom right-hand side of the tile and then clicking on **Add to Home**.



Click **Add**. Then click **Create a blank requisition**.

Fill out all necessary fields in the 'Add New Requisition' screen, as per descriptions provided below.

Add New Requisition

General

Optional

Template **checkbox:** Template functionality will remember your inputs when adding a new requisition, so you can use template to quickly create requisitions with the same details. If you want to use the current setting as a template, tick the box and name the template. Please go to [section 10](#) for detailed instructions.

Purchasing System: Select the relevant purchasing system.

Purchasing Location: Select the relevant area making the purchase. This should default to your location.

Requisition User: Will default to your User ID. You can change it if you are raising on behalf of someone else.

Comments – This detail **WILL** appear on the PO so please ensure any comment here is **meaningful** (e.g. description of goods/services, delivery only on Monday mornings, quote number, etc.). The detail entered here is searchable in Tech One.

Reference 1: Quote number, etc. – This **WILL NOT** appear on the PO.

Reference 2: Any additional reference numbers relating to the purchase. – This **WILL NOT** appear on the PO.

Purchase Order Type: Will default to Standard.

Priority: Select relevant priority (Normal, High, Urgent, Emergency).

GST Entry Mode: Select relevant option (Exclusive, Inclusive). Will default to Exclusive.

Date Required: Enter date that goods/service is required. This **WILL** appear on the PO.

NOTE: Tick the **Single Supplier Requisition** box to enter a requisition for **one Supplier only**. This will bring up the option to add the Supplier details on this screen.

Supplier

☐ Select Supplier From Supplier Catalogue

Supplier Ledger AP (Accounts Payable)	Supplier Account * 000450 (DELL AUSTRALIA PTY LTD) ▼
Supplier Address Code	

Supplier Account: Enter 6 digit Supplier Account No. if known or start typing the name of the Supplier to bring up the relevant Supplier. You can also click on the Advanced Search for a full list of Suppliers.

Reporting Codes

Supplier Reference
Supplier Contact
Flin Contact Name *
Flin Contact Ph *
Confirmation Order * N (No) ▼
Strategic Procurement Committee ▼
Quotes * ▼
Notes
Notes
Conditions to Apply * STD (Standard Uni PO) ▼
Professional Indemnity * 20 (\$20m) ▼
Public & Prod Liability Insurance * 20 (\$20m) ▼
Asset Custodian

Supplier Reference: Quote number, etc. – This **WILL NOT** appear on the PO.

Supplier Contact – This **WILL** appear on the PO.

Flin Contact Name: Contract Owner/Delegate/PO creator – This **WILL** appear on the PO.

Flin Contact Phone: Contract number for Owner/Delegate/PO creator – This **WILL** appear on the PO.

Confirmation Order: Y/N for the words “Confirmation Only” to print/not print on the PO

Strategic Procurement Committee: Y/N – Must be Y if total contract value is \$100k or above and need to attach SPC approval.

Quotes: Pick an option – please ensure this meets requirements outlined under 'Important Information' ([page 1](#))

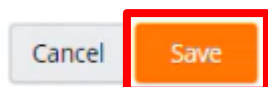
Notes: e.g. Completed Agreement and ROEC attached – this **WILL NOT** appear on the PO

Conditions to Apply: Defaults to Standard Uni PO

Professional Indemnity, Public & Prod Liability Insurance: Defaults to \$20m

Asset Custodian: If purchasing an asset, the person who will “own” this asset.

Once all mandatory fields have been completed, click **Save**.



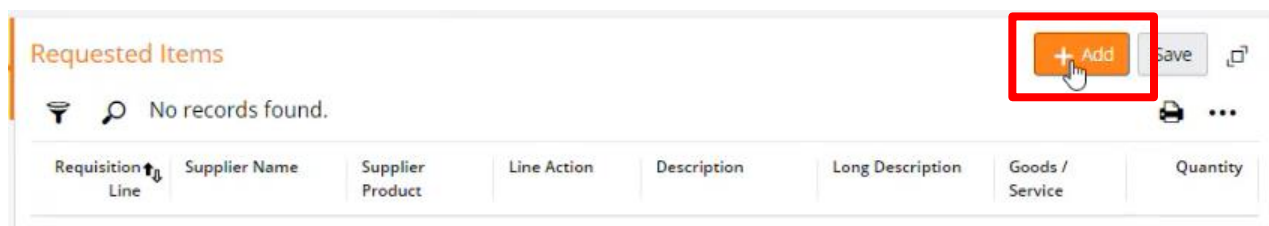
Adding items

Select **Add** then **Ad hoc request**.

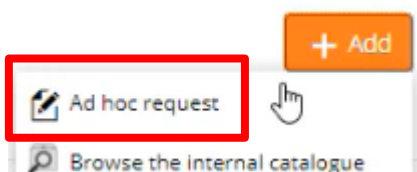
To add **Capital Works** related lines, please add an **Ad hoc request** as below then follow the instruction for CW lines.

Adding Ad hoc request

On the Requested Items screen, click **Add**.



Select **Ad hoc request**.



Fill out all necessary fields in the 'Add New Requested Item' screen, as per descriptions provided below:

Add New Requested Item

Item

Description *

40

Long Description

Supplier Product

Comment

Goods / Service *

Goods

Due *

12-Sep-2023

GST Rate *

C (Current Rate)

Quantity

1

Unit Name *

EACH (Each)

Unit Amount (Exclusive) (AUD)

0

Line Amount (Exclusive) (AUD)

0.00

Destination Inventory Location

Contract Details

Contract System

\$DEFAULT (Default Contra...

Contract Type

Supply Contract

Contract

Reporting Codes

Contract (CMS) Reference

Description is mandatory as this information comes over to Basware – Enter a **short meaningful description** for each item.

Long Description: Can be used to fit additional information, if required.

Supplier Product: Enter details of what you are purchasing.

Comment: Additional information can be included, as required.

Select Goods or Service – Goods will be a quantity at a rate; Service will be a total.

Due: Enter due date for goods/service. Will default to 7 days.

GST Rate: Will default to Current Rate, but can change if required.

Unit Amount: Enter GST exclusive amount.

Contract Details: N/A (relates to TechOne Contracts)

Contract (CMS) Reference: Enter CMS reference for purchase, if applicable.

Under the **Cost Accounts** section, enter relevant **Ledger** (GL, SL or CW).

^ Cost Accounts Balance Amounts

+ 🔍 > 1 - 1 of 1 record.

	Dissection Number	Ledger	Account	Account Description	GST Rate	Dissection Amount (Exclusive)	Resource Group
<input type="checkbox"/>	1				C	50,000.00	

In the **Account** field, select the correct Account number. This will populate the Account Description field.

Finding active Account

Account can be selected in the Drop-down list. This list shows inactive and active tasks, and the system will produce an error if an inactive task is selected. Please enter an active account you wish to purchase against or filter on Active tasks only. Below screenshots show how to use the filter function.

^ Cost Accounts

+ 🔍 > 1 - 1 of 1 record.

	Dissection Number	Ledger	Account	Account Description
<input type="checkbox"/>	1	CW		

Work Order	Description
08400-200-004	*** error do not
P0086-200-001	1.0 Strategic Ana
08405-200-001	11 kV Ring Main
08446-200-005	11 kV Stages 4 &
08424-200-001	11 kV Upgrade S
08257-200-001	11kV Renewal -
08373-200-001	11kV Ring Main I

Advanced search

Account 🔍 ✕

📅 ▼ 🔍

⌆ 1 - 11 of 5,085 records. 🖨 ⋮

Work Order	Description	Description (Project)	Descr
08400-200-004	*** error do not use	2014 Campus Wide - HVAC Program	Pro
P0086-200-001	1.0 Strategic Analysis	Postgrad Lab Library	Pro
08405-200-001	11 kV Ring Main Upgrade	2014 Campus Infrastruct- Electrical Serv	Pro
08446-200-005	11 kV Stages 4 & 5 Civil Works	2017 IRP - Electrical Infra Renewal	Pro
08424-200-001	11 kV Upgrade Stage 1	2015 IRP - Electrical Services	Pro
08257-200-001	11kV Renewal - Stages 4 & 5 Civil works	2018 IRP - Electrical Services Renewal	Pro

Criteria builder ✕

Contains Keywords ➕

OK Cancel

Type in the criteria as in the screenshot below, then click **OK**.

Criteria builder ✕

Contains Keywords ➕

0 Status - Code Is equal to Active ➕ ✕

OK Cancel

Then click on the **Magnify Glass** icon to filter.

Account 🔍 ✕

📅 🔍

⌆ 1 - 11 of 658 records. **Active tasks** 🖨 ⋮

Work Order	Description	Description (Project)	Descr
02132-200-013	2021 Non-Salary Costs - test	CIP Program Delivery	Pro
02132-200-015	2022 Non-Salary Costs	CIP Program Delivery	Pro
02132-200-014	2022 Salary Costs - Flinders Staff	CIP Program Delivery	Pro
02132-000-012	2023 CIP Income Allocation - Non-Salary	CIP Program Delivery	Apf
02132-000-011	2023 CIP Income Allocation: Salary Costs	CIP Program Delivery	Apf
02132-200-017	2023 Non-Salary Costs	CIP Program Delivery	Pro
02132-200-016	2023 Salary Costs - Flinders Staff	CIP Program Delivery	Pro
10176-200-002	Accruals	CoSE Biodiversity Facility	Pro
10560-300-001	ACCRUALS	IDS Relocation & CO of S&E Front	Acc
10568-300-001	ACCRUALS	Registry Rd Bus Shelter Improvements	Acc
10591-300-001	ACCRUALS	Flinders Living Landscape Fencing	Acc

Select the applicable **GST Rate**.

NOTE: You can add multiple lines if required.

For **Capital Work**, choose Ledger as **CW**, then select the required **Resource Group** and **Resource** from the drop-down lists.

Requested Items
0 Items

Costing Summary
0 dissections

Settings
Portfolios purchasing location
Required 10-Oct-2023
Entered

Supplier Details
PO BOX 5044
LYNEHAM ACT 2602
Australia

Addresses
1 Sturt Road
BEDFORD PARK SA 5042
Australia

Authorisation History
2 Items

Requested Items
← Requested Items

Add New Requested Item

Contract (CMS) Reference

Cost Accounts
+ > 1 - 1 of 1 record.

Ledger	Account	Account Description	GST Rate	Dissection Amount (Exclusive)	Resource Group	Resource
CW			C	1,000.00		

Resource Group **Description**

- CW_CC CW Construction
- CW_FFE CW FF&E Resou
- CW_ISEQUIP CW IS Equipmer
- CW_MISC CW Miscellaneous
- CW_PF CW Professiona

Submit for Approval

SURVEY DESIGN & ANALYSIS SERVICES - ABN:37051831826 (REQ000197)
0 items, Total (Exclusive) AUD 0.00

Requested Items
0 Items

Costing Summary
0 dissections

Settings
Portfolios purchasing location
Required 10-Oct-2023
Entered

Supplier Details
PO BOX 5044
LYNEHAM ACT 2602
Australia

Addresses
1 Sturt Road
BEDFORD PARK SA 5042
Australia

Requested Items
← Requested Items

Add New Requested Item

Contract (CMS) Reference

Cost Accounts
+ > 1 - 1 of 1 record.

Ledger	Account	Account Description	GST Rate	Dissection Amount (Exclusive)	Resource Group	Resource
CW			C	1,000.00	CW_PF	

Resource **Description**

- 001 Professional Fees
- 002 Quantity Surveyor

Advanced search

Once done, click **Save**.

Cancel **Save**

Balance Amounts

Adding Dissections

Click on an Item, then **Add Dissections**.

SARAH CONSTRUCTIONS PTY LTD - ABN:81007608880 (REQ000140)
1 item, Total (Exclusive) AUD 5,000.00

Requested Items
3 items
2 items are not fully costed

Costing Summary
3 dissections

Settings
Portfolios purchasing location
Required 03-Oct-2023
Entered

Supplier Details
49 GLEN OSMOND ROAD
EASTWOOD SA 5063
Australia

Requisition Line	Supplier Name	Supplier Product	Line Action
1	SARAH CONSTR...		Purchase
2	SARAH CONSTR...		Purchase
3	SARAH CONSTR...		Purchase

1 - 3 of 3 records.

Dropdown menu for Requisition Line 3:

- Edit
- Add Dissections**
- View Supplier
- Select Alternate Supplier
- Create duplicate

Fill out the required fields.

Editing Addresses and Adding Attachment

Click on the **Addresses** tab, from the menu on the left-hand side of screen.

Requested Items
1 item

Costing Summary
1 dissection

Settings
Portfolios purchasing location
Required 12-Sep-2023
Entered

Supplier Details
GPO BOX 4766
SYDNEY NSW 1044
Australia

Addresses
1 Sturt Road
BEDFORD PARK SA 5042
Australia

Authorisation History
2 items

Attachments
0 Attachments

Change the **Delivery Address**, to ensure it reflects the address you want the goods/service to be directed to.

Addresses

Delivery Address

Delivery Instructions

Delivery Address *

D00000001 (1 Sturt Road)

Add New Address

Street Address

1 Sturt Road

City/Town

BEDFORD PARK

State

SA

Postcode

5042

Country

Australia

Phone

Fax

Contact

Cancel

Save

Click **Save**.

To add attachments to the Requisition (E.g. Agreement, ROEC, SPC approval, tender exemption, quotes, coding confirmation, etc) click on the **Attachments** tab on the left-hand side menu.

Requested Items
1 Item

Costing Summary
1 dissection

Settings
Other Entity purchasing location
Required 18-Jul-2023

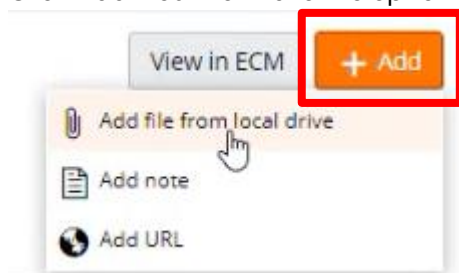
Complete

Addresses
1 Sturt Road
BEDFORD PARK SA 5042
Australia

Authorisation History
4 Items

Attachments
0 Attachments

Click **Add**. You then have the option to **Add from local drive**, **Add note** or **Add URL**.



Submitting for Approval

To send your Requisition for approval, click **Submit for Approval**.



Enter your line Manager (or the person who needs to approve your requisition) in the **Pool Member** field.

NOTE: If you start typing the name, it will pop up with options to select from.

Once you have selected the correct approver, click **OK**.

A screenshot of a form titled 'Submit for Approval'. The form contains the following elements: a message 'This will complete the current task Create Requisition. The next task is: Approve Requisition'; a 'Resource Pool' dropdown menu with 'DEFAULT' selected; a 'Pool Member' dropdown menu which is highlighted with a red border; a 'Comments' text area; and at the bottom, 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red border.

Approver to approve

Your Approver will receive a request to approve your requisition in their **My Tasks** tile within TechOne. The function can be found in

- **FlinU Purchasing Officer** role >> **More** tab,

U Purchasing Officer

My 17 System Administration FlinU Purchasing Officer 940 All Roles

My Requisitions 17 Requisitions 105 My Purchase Orders 1 Purchase Orders 725

My Goods Receipts 1 Goods Receipts 22 Purchasing Analysis

More (3) 69 Reports (7)

My Tasks 69

Tasks Filters Search

- (1) Calculators - AUD 1,100.00
Goods Receipt: Create Receipt
- (1) Professional Fees Unspecified - AU...
Requisition: Create Requisition
- (2) Groundworks/Civil, Demolition - AU...
Requisition: Create Requisition
- (4) Floor Finishes, Painting, Electr... - A...
Requisition: Create Requisition
- (1) Construction Unspecified - AUD 16,...

69 Tasks

OR

- **FlinU Purchasing Approver** role.
Note: this role may or may not be assigned to you.

Home My 17 System Administration FlinU Purchasing Approver All Roles

FlinU Purchasing Approver

My Tasks 69

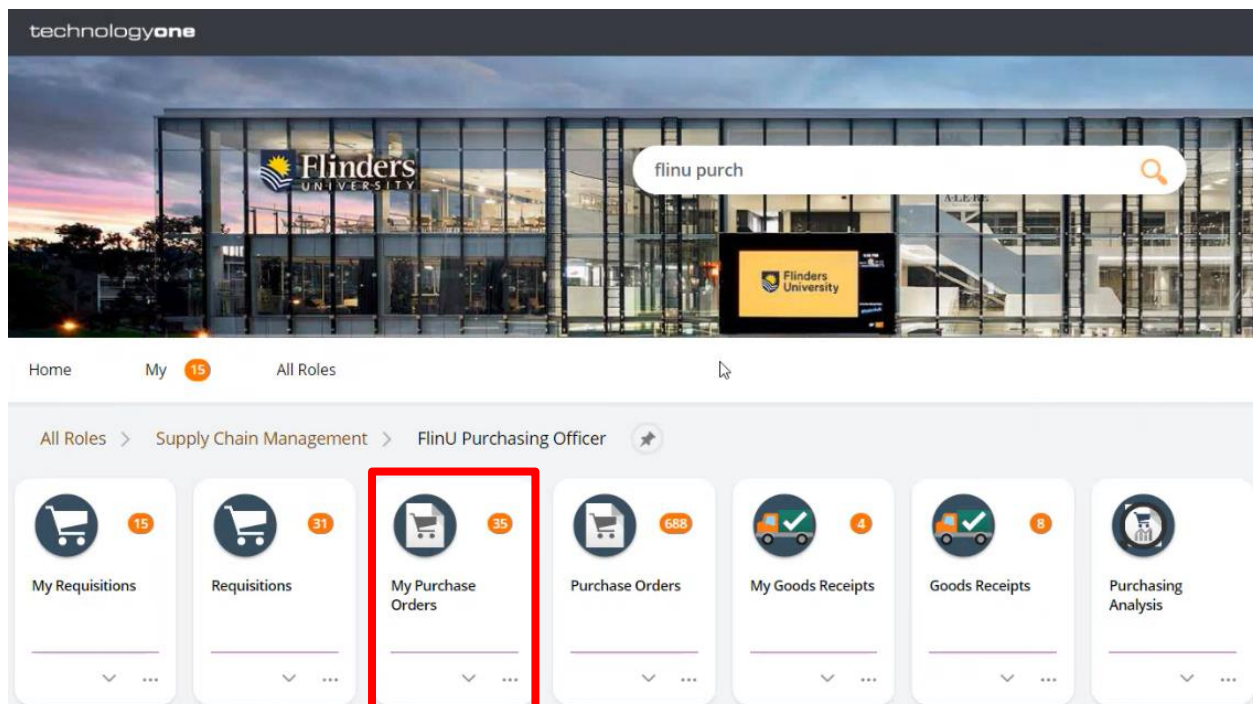
Tasks Filters Search

- (1) Calculators - AUD 1,100.00
Goods Receipt: Create Receipt
- (1) Professional Fees Unspecified - AU...
Requisition: Create Requisition
- (2) Groundworks/Civil, Demolition - AU...
Requisition: Create Requisition
- (4) Floor Finishes, Painting, Electr... - A...
Requisition: Create Requisition
- (1) Construction Unspecified - AUD 16,...

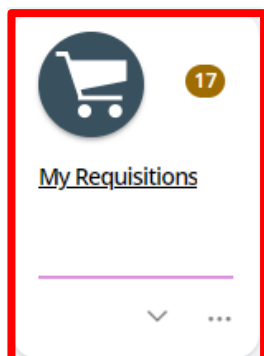
69 Tasks

Purchasing Analysis

Once the request has been approved, you will receive an email and a notification in your **My Tasks** tile. You can now locate the approved requisition in **My Purchase Orders** tile.

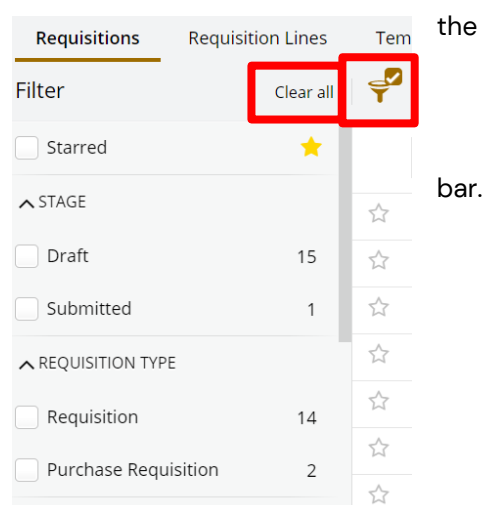


Or in **My Requisition** tile



Note: If you cannot find your requisition in the listing, follow below steps to remove the filters from the listing.

1. Click on the **funnel icon** to view the filters,
2. Click on **Clear all**,
3. Click on the **funnel icon** again to minimise the side



- If you are viewing on monitor, from the **requisition**, click on the **Purchase Order** button at the bottom right-hand side of the screen.

Then click on Purchase Order which appears at the top right-hand side of screen.

PURCHASE ORDER ON ORDER

DELL AUSTRALIA PTY LTD Order VCO014285

GPO BOX 4766
SYDNEY NSW 1544

Reference: 000450
Vendor: 05-Sep-2023
Issued: 12-Sep-2023
Required: AUD
Currency: Jenerite Norman
Requisition User:

Comments: Attention ANDREW MUNAUGHTON

Additional Details

Supplier Reference	Jenerite Norman	Supplier Contact	Flin Contact Rb	1234567
Plan Contact Name	NA	Confirmation Order		H
Delivery Location	ATTACHED	Tender Exemption Form	Attached	Notes
Strategic Procurement		Conditions to Apply	STD	
Quotations	20	Public & Prod Liability	20	Insurance
Notes				
Professional Indemnity				
Asset Custodian				

Description	Ordered		Received		Invoiced	
	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)
50 x Laptops	50.00	50,000.00	0.00	0.00	0.00	0.00
Total		50,000.00				

Requisition **Purchase Order**

This will take you into your Purchase Order. From here, click on the **orange arrow** at the top left-hand side of screen.

- If you are viewing on laptop screen, scroll down on the left side bar, then click on **Purchase Order**, then click on the **Purchase Order button** on the top right of the screen.

Addresses
1 Sturt Road
BEDFORD PARK SA 5042
Australia

Authorisation History
11 items

Purchase Order
1 purchase order

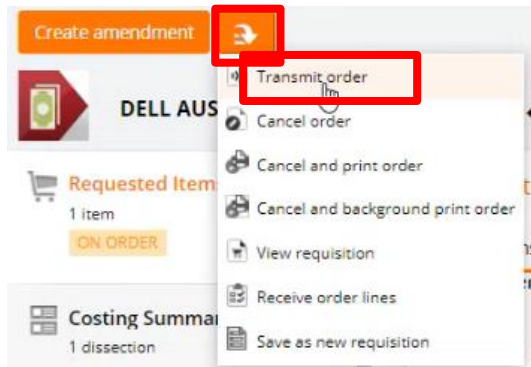
Flinders University

at 27-Sep-2023 12:05:50 [View audit details](#)

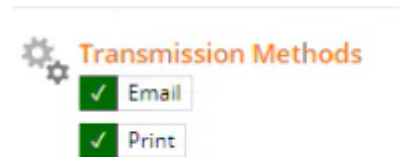
Purchase order

Transmitting Order

To send or print your Purchase Order. Click **Transmit order**.



Depending on the settings registered against the particular supplier, you will have the options to either **print**, **email** or **export** the Purchase Order. Select which method you want to use. You can click **Edit** to make any necessary changes.

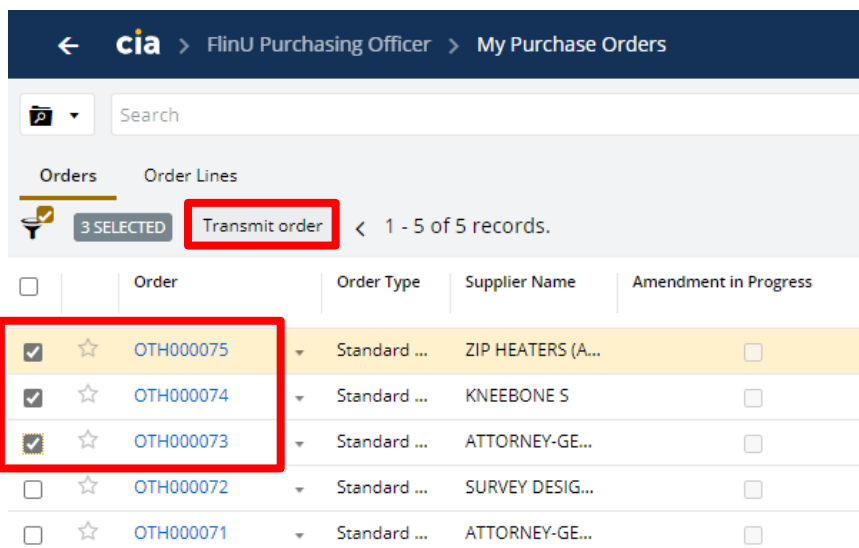


Once transmission methods have been confirmed, click **Transmit**.

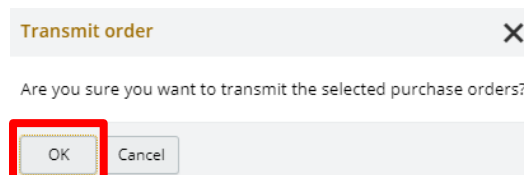


Bulk Transmitting Orders

To print multiple Purchase Orders. Go to **My Purchase Orders** or **Purchase Orders** to view the listing. Tick on the PO's you want to transmit, then click on **Transmit order**.



Confirm **OK** on the prompt.



Selected Transmission Methods column will display the transmission action that will be carried out. If you want to **edit the transmission methods** a particular Purchase Order, click the down arrow on the PO line, then click **View**.

← Document Transmit > Bulk Document Transmit

Please select documents to transmit.
Any transmissions with error messages can be resolved by viewing the transmission and correcting any issues.

0 SELECTED Transmit Run Online < 1 - 3 of 3 records.

	Transmission	Description ▼	Selected Transmission Methods	Transmission
<input type="checkbox"/>	1	Purchase Order (OTH000075)	Email, Print	
<input type="checkbox"/>	2	View	Print	
<input type="checkbox"/>	3	Purchase Order (OTH000073)	Print	

In this case, we will try **removing Email** from the **Transmission Methods**. The change **only applies to this current bulk transmission**, the default setting remains the same. So, the next time you transmit a PO from the same supplier, the methods will still be "Email, Print" as in this case.

Click **Edit**, then **untick the Send by email** box, then **Save**.

← Bulk Document Transmit > Document Transmit ?

Transmit 1 of 3 < >

OTH000075 - ZIP HEATERS (AUST) PTY LTD Created by [redacted] at 10-Oct-2023 15:51:42

Transmission Methods

- ☒ Email
- ☒ Print

Attachments
0 of 3 attachments included

Document Preview

Transmission Methods

^ Email

☒ Send by email

Subject
Purchase Order OTH000075

Message
.

Edit

OTH000075 - ZIP HEATERS (AUST) PTY LTD Created by [redacted] at 10-Oct-2023 15:51:42

Transmission Methods

☒ Email

☒ Print

Attachments

0 of 3 attachments included

Document Preview

Transmission Methods

^ Email **Untick**

☐ Send by email

Subject
Purchase Order OTH000075

Message

Cancel

Save

Click on the back arrow to return to Bulk Document Transmit screen.

< Bulk Document Transmit

> Document Transmit

Transmit

OTH000075 - ZIP HEATERS (AUST) PTY LTD

Transmission Methods

☒ Print

Transmission Methods

^ Email

Tick on all the PO's then click **Transmit** to start the process.

< Document Transmit

> Bulk Document Transmit

Please select documents to transmit.

Any transmissions with error messages can be resolved by viewing the transmission and correcting any issues.

Search

3 SELECTED

Transmit

Run Online

< 1 - 3 of 3 records.

<input checked="" type="checkbox"/>	Transmission	Description	Selected Transmission Methods
<input checked="" type="checkbox"/>	1	Purchase Order (OTH000075)	Print
<input checked="" type="checkbox"/>	2	Purchase Order (OTH000074)	Print
<input checked="" type="checkbox"/>	3	Purchase Order (OTH000073)	Print

Click **OK** on the prompt to confirm.

Confirm Action

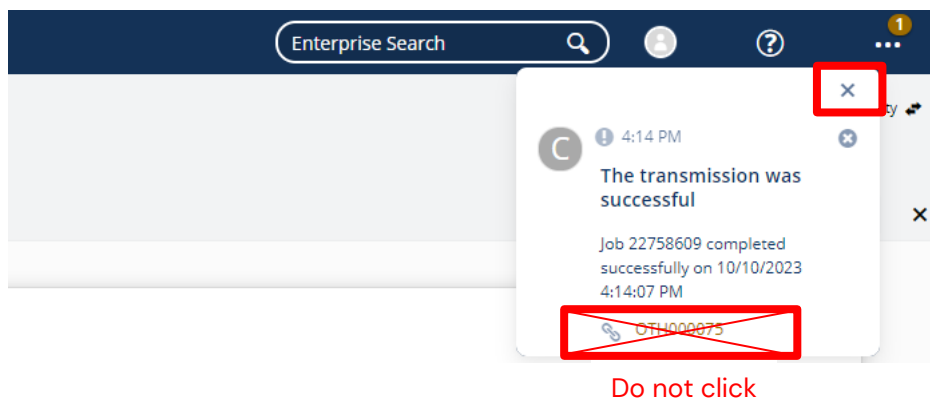
Are you sure you want to transmit the selected transmissions?

OK

Cancel

Wait for a moment until you see a notification pop-up on the top right corner of your screen announcing the successful transmission.

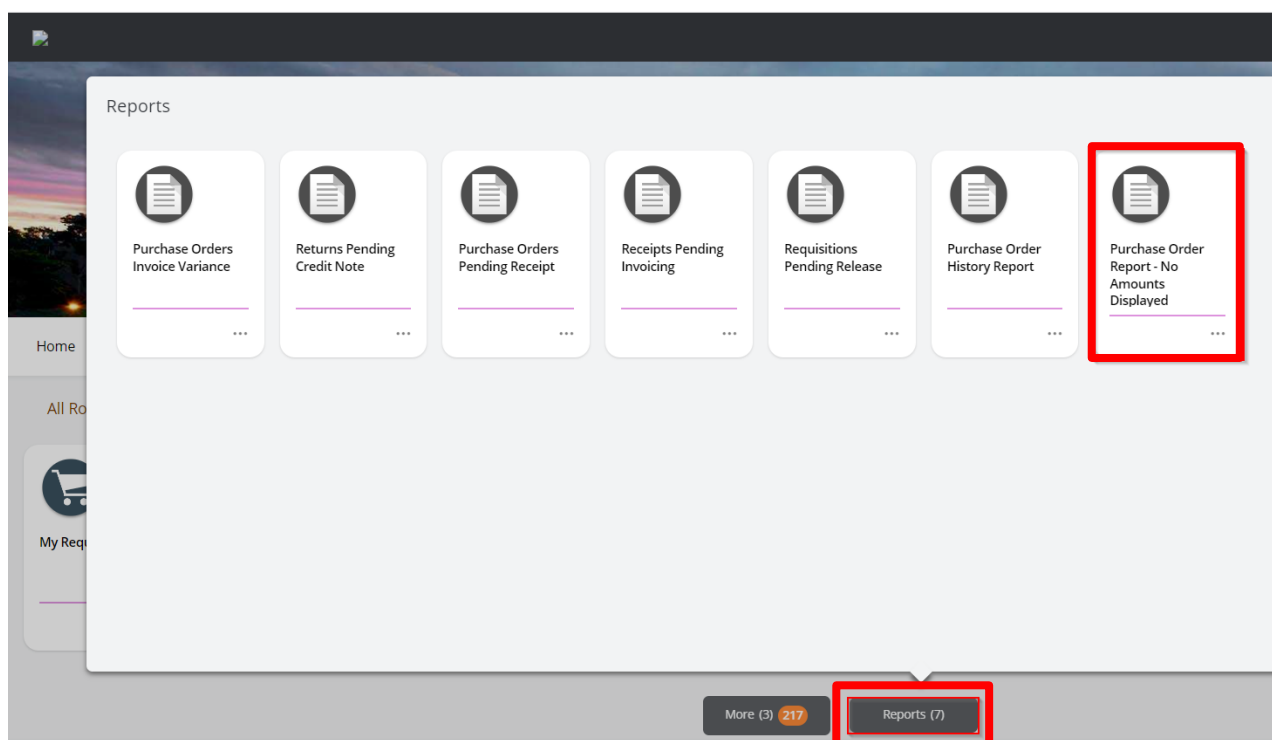
Do not click on the link in notification. Click on the X to close the notification.



There will be emails sent to your mailbox with the PDF transmission files attached. Each email contains 1 file for 1 Purchase Order.

3. Printing the Purchase Order without the value showing

From within the FlinU Purchasing Officer workplace, select the Reports button. Then select the **Purchase Order Report – No Amounts Displayed** tile.



Click on the **Parameters** tab on the left-hand side and enter the applicable purchase order then click **Run**.

Flinders Purchasing Officer > Report Submission

Parameters

Purchase Order Report - No Amounts Displayed

Criteria Details

Sort Order
Order Number Ascending Group Sort
Pur Ord Line Nbr Ascending Record Sort

Parameters

General

Title *
Testing CI PO Crystal Report

Export Format *
Acrobat Format (PDF)

Category
Financials

Report Parameters

Order Number *
VCO014295

BGL000067

EPS000118

EPS000130

EPS000131

EPS000140

EPS000141

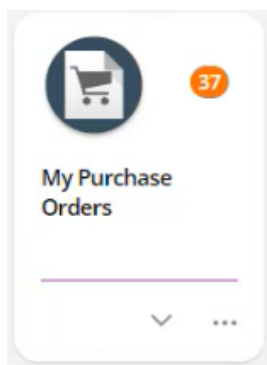
HAS000171

HAS000172

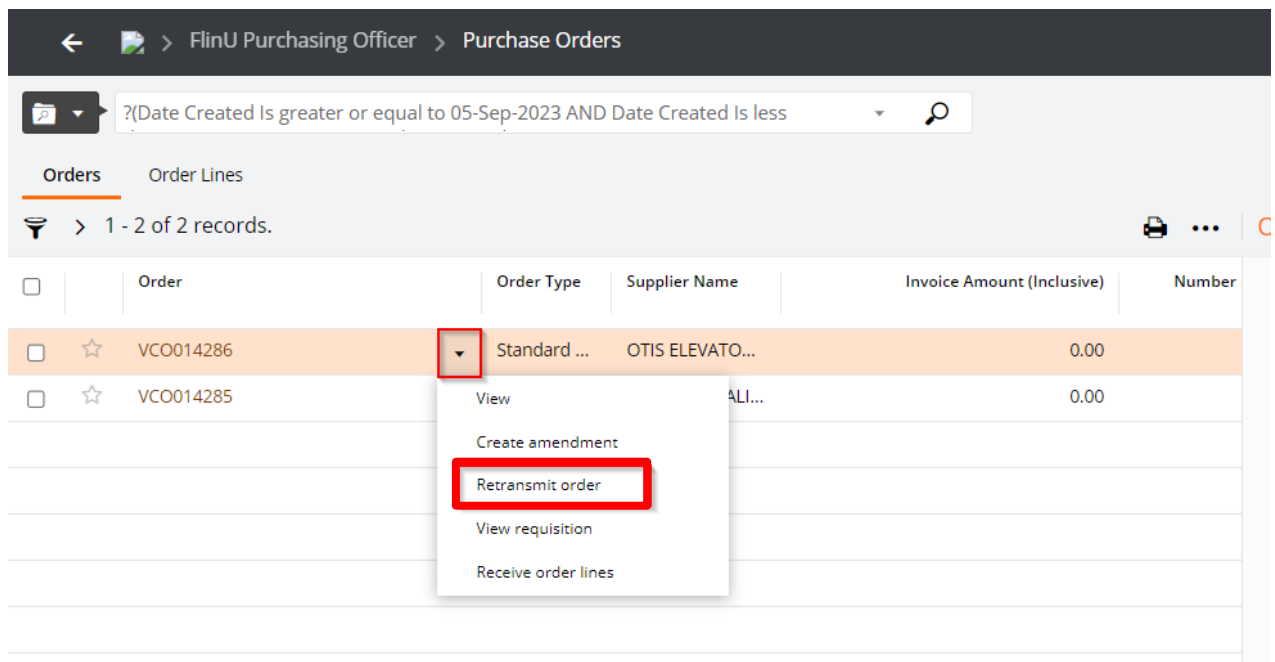
Advanced search

4. Reprint a Purchase Order

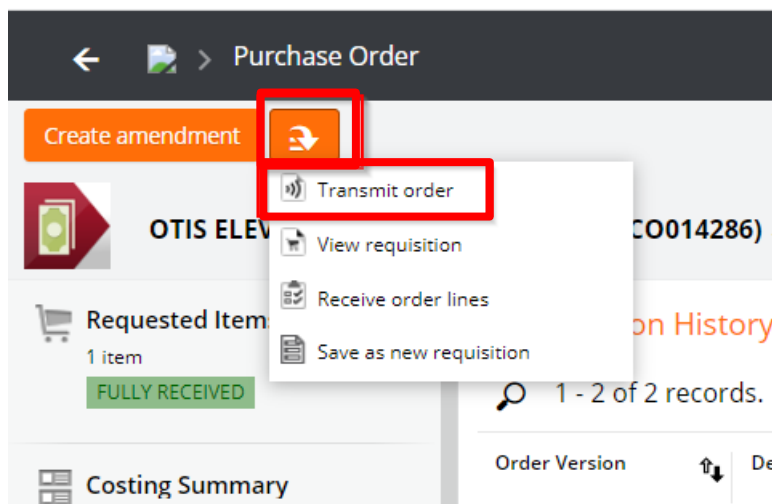
Locate the Purchase Order from within the **My Purchase Orders** tile.



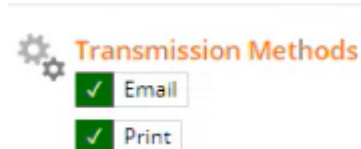
Use the **drop-down arrow** on the relevant purchase order in the grid and select **Retransmit order**.



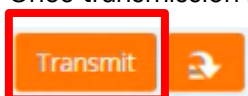
Alternatively, from within the Purchase Order click on the **orange drop-down arrow**. Then click **Transmit order**.



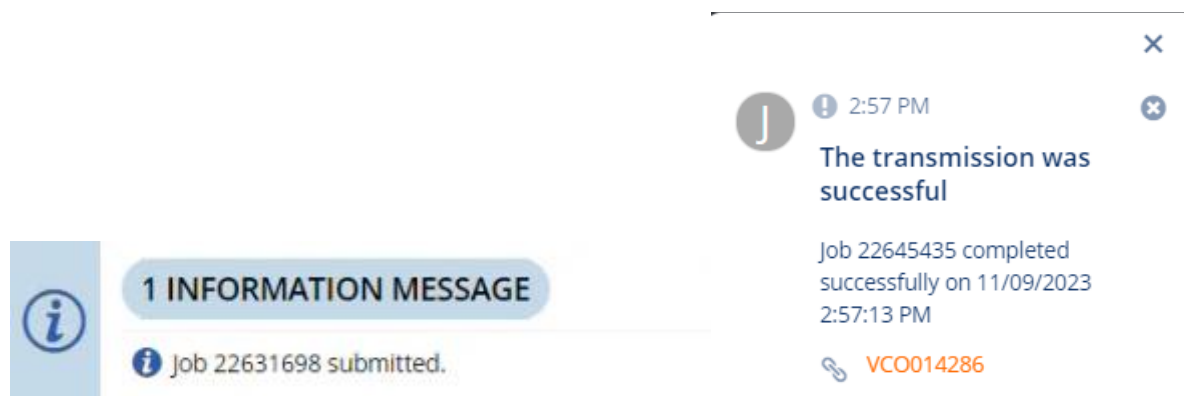
Depending on the settings registered against the particular supplier, you will have the options to either **print**, **email** or **export** the Purchase Order. Select which method you want to use. You can click **Edit** to make any necessary changes.



Once transmission methods have been confirmed, click **Transmit**.



An 'Information Message' will pop up at the top of your screen which shows "*Job ##### submitted*". Once successfully transmitted, a second notification will display with a link to the reprinted order.



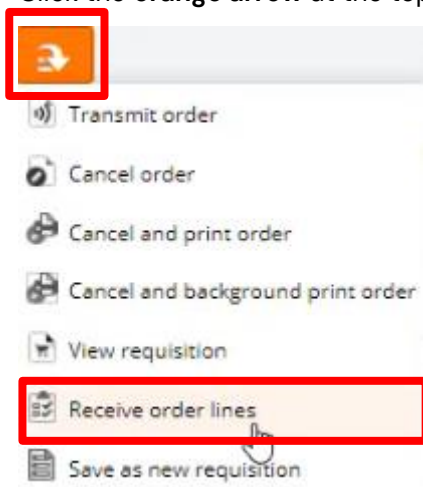
NOTE: The Purchase Order will be marked as "**REPRINT**".



5. How to Receipt a Purchase Order

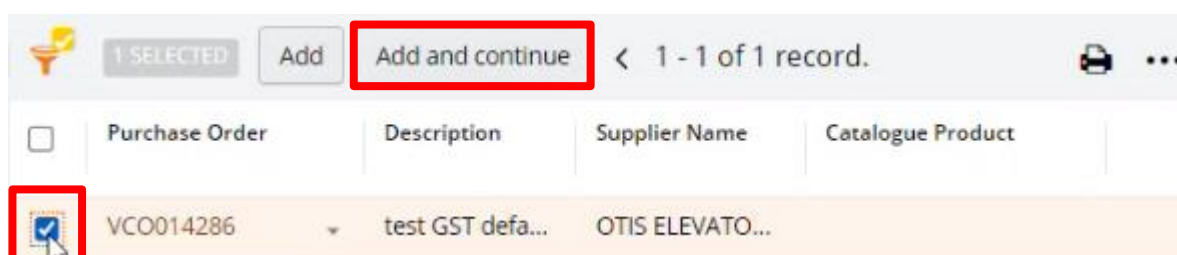
Locate the Purchase Order from within the **My Purchase Order** tile.

Click the **orange arrow** at the top left-hand side of screen and select **Receive order lines**.



The order lines available for receipting will be displayed.

Put a **tick in the box** next to the line you need to receipt. Then click **Add and continue**.



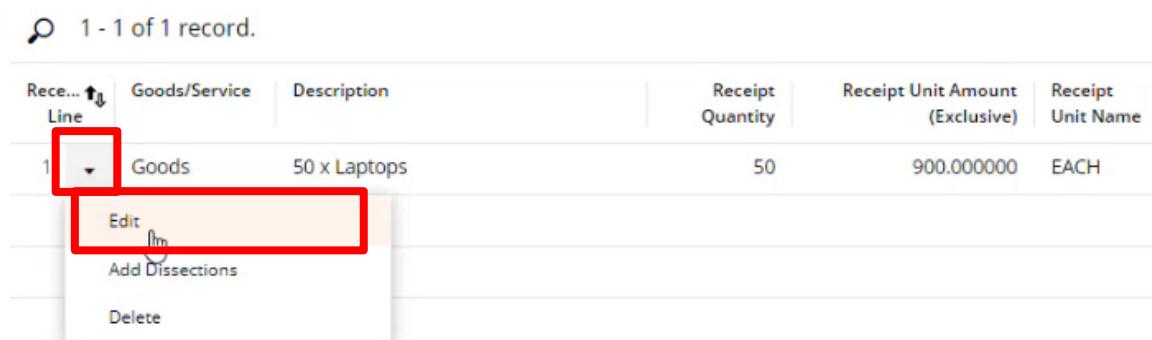
You can now view receipt amounts, within the Received Items screen.

Partial Receipt

If only part of the total PO amount is being receipted, you will need to edit the Received Items before proceeding to Approval.

To edit the receipt amount, click on the **arrow** next to the line you need to edit. Then select **Edit** from the drop-down menu.

Received Items



Make any **necessary changes** (e.g. change receipt quantity if only partial order has been received). Once changes have been made, click **Save**.

← Receipted Items

50 x Laptops

50 x Laptops - (DELL AUSTRALIA PTY LTD)

Receipt Quantity 50	Receipt Unit Name * EACH (Each)
GST Rate * C (Current Rate)	Purchase Type General Purchase
Receipt Unit Amount (Exclusive) 900	Receipt Amount (Exclusive) 45,000.00

Line Comment

Tolerance Status
Within Tolerance

Reference

Supplier Reference 1	Supplier Reference 2
----------------------	----------------------

Cancel Save

Attaching Invoice

To attach invoice approvals and any other relevant documents, click on the **Attachments** tab on the left-hand side menu.

Receipted Items
1 item

Dissection Summary
1 dissection

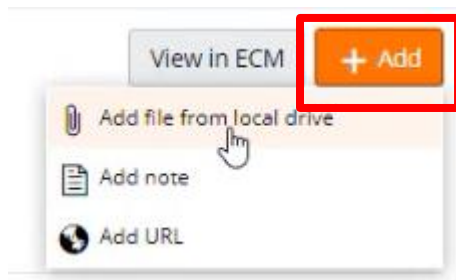
Settings
Portfolios purchasing location

Authorisation History
2 items

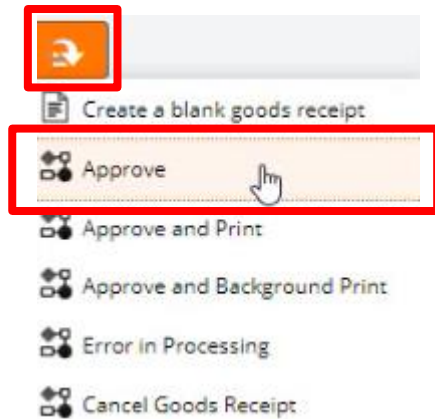
Transmission History

Attachments
0 Attachments

Click **Add**. You then have the option to **Add from local drive**, **Add note** or **Add URL**.



When the receipt matches the invoice, click the **orange arrow** and then click **Approve**.



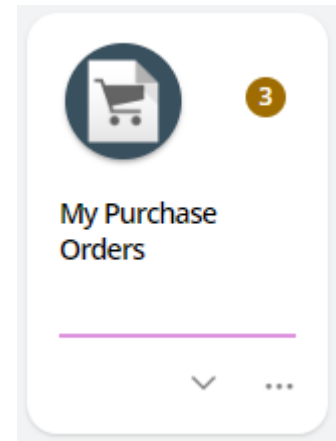
If an invoice has already been received for the items you are receipting, advise AP once you've completed the receipt.

6. How to Cancel a Receipt

NOTE: You cannot cancel a receipt that an invoice has been matched to.

You should navigate to your Goods Receipt via the PO in My Purchase Orders tile. The following steps will show you how.

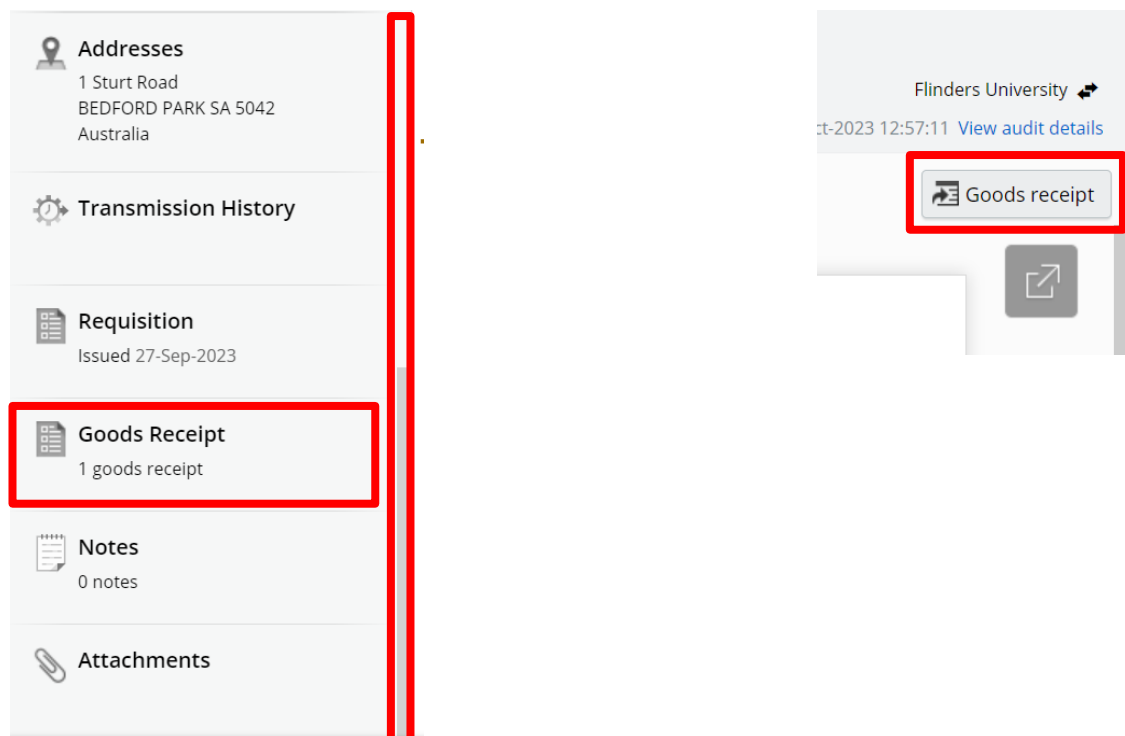
Go to **My Purchase Orders** from **FlinU Purchasing Officer** role.



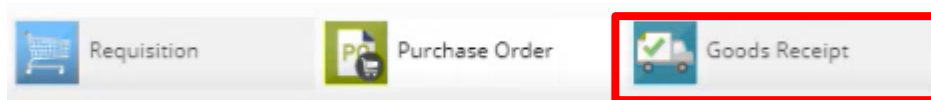
Select the right PO.

← technologyone > FlinU Purchasing Officer > My Purchase Orders					
<div><div></div><div>Search</div><div></div></div>					
<div>Orders Order Lines</div>					
<div> > 1 - 3 of 3 records. </div>					
<input type="checkbox"/>	Order	Order Type	Supplier Name	Amendment in Progress	
<input type="checkbox"/>	OTH000...	Standard ...	ATTORNEY-GE...	<input type="checkbox"/>	
<input type="checkbox"/>	OTH000...	Standard ...	SURVEY DESIG...	<input type="checkbox"/>	
<input type="checkbox"/>	OTH000...	Standard ...	ATTORNEY-GE...	<input type="checkbox"/>	

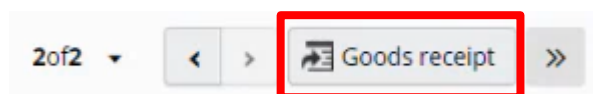
- If you are viewing on laptop screen, scroll down on the left side bar, then click on **Goods Receipt**. Click on the **Goods Receipt** button on the top right of your screen to view the receipts.



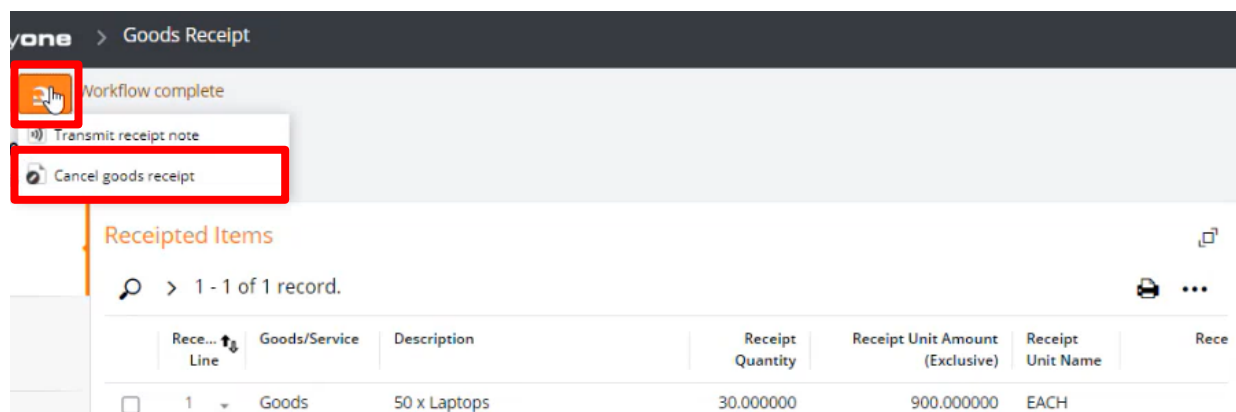
- If you are viewing on monitor, you can click on the **Goods Receipt** tab at the bottom right-hand side of your screen.



From here, you can flick through the associated **Goods Receipts**.



From the **Goods receipt**, click the **orange drop-down arrow**, then select **Cancel goods receipt**.



Enter a **Cancellation reason** in the pop-up box and press **OK**.

A screenshot of a 'Cancellation Reason' pop-up box. The box has a title bar with the text 'Cancellation Reason' and a close button (X). Inside the box is a large text input field with the placeholder text 'Cancellation Reason *'. Below the input field is a red error message that says 'This field requires a value'. At the bottom of the box are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangle.

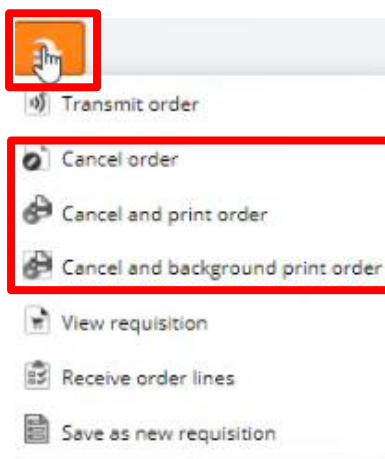
7. Cancelling/Closing a Purchase Order

NOTE: This can be done if the PO has no open receipts (e.g. Receipts have invoices matched to them). You can cancel/close a PO that has not been receipted or is partially receipted.

If the PO has a partial receipt and no invoice matched, first cancel the receipt, and then proceed to close the PO.

Navigate to the Purchase Order you need to cancel.

Click on the **orange drop-down arrow**, then select **Cancel order** or **Cancel and print order** or **Cancel and background print order**, depending on which is required.



Enter a **cancellation Reason**. Click **Add** to attach any relevant documentation. Once done, click **OK**.

Cancellation Reason

Cancellation Reason * 237
No longer required


Attachments (\$PURORD)
Drag new attachments here

+ Add

OK Cancel

You will receive a pop-up message which confirms the order has been cancelled.

1 INFORMATION MESSAGE

 Order (FU/VCO014285) cancelled.

8. Amending a Purchase Order

From within the Purchase Order, Click **Create Amendment**, at the top left-hand side of screen.

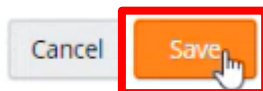


Enter an **Amendment Comment**.

Create a new amendment

Amendment Details

Click **Save**.



Make any necessary changes from **PO details** to **Ordered Items**.

Click on the tab you want to change (in the below screenshot, Settings tab is selected), then edit the fields.

To add or modify items, go to **Ordered Items**. In here, you can select **Edit/Create duplicate/Add Dissections** the existing items, or Add a new item by clicking **+ Add**.

Amendment
Order Total (Inclusive) 5,500.00
Currency AUD
In Progress

Purchase Order
Order Total (Inclusive) 5,500.00
Currency AUD
In Progress

Ordered Items
1 Item

Ordered Items

1 - 1 of 1 record.

Order Line	Description	Long Description	Goods/Service	Order Quantity	Order Unit	GST Rate
1	Calculators	Calculators	Goods	100.000000	EACH	C

Actions: Edit, Create duplicate, Add Dissections

Buttons: + Add, Save

For any details you update, you will need to click the **Save** button that pops up, to save your amendments .

Ordered Items

1 - 1 of 1 record.

Quantity	Order Unit	GST Rate	Unit Amount (Exclusive)	Order Amount (Inclusive)	Order GST Amount	Amendment Comment
50	EACH	C	900.00	49,500.00		

Buttons: + Add, Save

Save, Cancel

You then also need to click **Save** at the top right-hand side of your Ordered Items list.

+ Add, Save

Once all amendments have been made, click **Submit for Approval**, to send your amended Purchase Order for Approval.

Submit for Approval

Enter your line Manager (or the person who needs to approve your requisition) in the **Pool Member** field. **NOTE:** If you start typing the name, it will pop up with options to select from.

Once you have selected the correct approver, click **OK**.

Submit for Approval

This will complete the current task Create Requisition. The next task is: Approve Requisition

Resource Pool *
DEFAULT

Pool Member *

Comments

OK Cancel

Approver to approve Amendment

Your line Manager will receive a request to approve your amended purchase order in their **My Tasks** tile within TechOne. The process is the same as [Approving a Requisition](#). Once they access the purchase order, they will have a view of what has been amended.

PURCHASE ORDER AMEND IN PROGRESS

DELL AUSTRALIA PTY LTD
GPO BOX 4766
SYDNEY NSW 1044

Order Reference VC0014285
Issued 05-Sep-2023
Required 12-Sep-2023
Currency AUD
Requisition User Jenette Norman
Amendment User Jenette Norman

Amendment Reason
Amendment created on 05-Sep-2023

Header Userfields

Supplier Reference	Supplier Contact	
Fin Contact Name	Fin Contact Ph	1234567
Delivery Location	Confirmation Order	N
Strategic Procurement Committee	Tender Exemption Form	
Quotes	Attached Notes	
Notes	Conditions to Apply	STD
Professional Indemnity	Public & Prod Liability Insurance	20
Asset Custodian		

Description	Current Approved		Amended		Difference	
	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)
50 x Laptops	50.00	50,000.00	50.00	45,000.00	-	5,000.00
Total		50,000.00		45,000.00	-	5,000.00

Costing Summary

Ledger	Account	Current Approved		Amended		Difference	
		Amount (Exclusive)	Amount (Exclusive)	Amount (Exclusive)	Amount (Exclusive)		
GL	01.001.01900.3334	50,000.00		45,000.00	-	5,000.00	
3351A	Flinders Univ. 2017 Oper. Office Serv & Equip Ch						

Once the amended purchase order has been approved, you will receive an email to notify you.

9. Updated on 14/09/23

Printed versions of this document are not controlled. Please refer to the Flinders Policy Library for the latest version.

10. Using Template to create new requisition

Tick the Template box then name the Template. Continue filling the other required fields as explained in [section 2](#), then **Save**.

The template has been created.

Add New Requisition

General

Purchasing System * FU (Flinders University)	
Purchasing Location * OTH (Other Entity)	Requisition User * [Redacted]
Comment <div></div>	
Reference 1	Reference 2
Purchase Order Type * Standard	Priority * Normal
GST Entry Mode * Exclusive	Date Required * 17-Oct-2023
<input checked="" type="checkbox"/> Template <input type="checkbox"/> Single Supplier Requisition	
Template Name * Sample	

Cancel	Save
--------	------

Next time when you want to raise a new requisition using a template, go to **My Requisition** as usual, then switch to **Templates** tab. Click on the down arrow on the template, then **Create from template**.

Add

Requisitions
Requisition Lines
Templates

1 - 1 of 1 record.

	Requisition	Requisition Type	Number of Lines	Description
☆ REQ000210	▼	Requisition	0	Sample
<div> Create from template </div> <div> Edit </div>				

You will be lead straight to the **Requested Items** screen to add items.

You can modify the details from the **Settings** and **Addresses** tab.

Then continue completing the requisition as usual.

<
cia
> Requisition

Submit for Approval

Requisition (REQ000212)

0 Items, Total (Exclusive) AUD 0.00

Requested Items
0 Items

Requested Items

Add
 Save

No records found.

Requisition Line	Supplier Name	Supplier Product	Line Action	Description	Long Description	Goods / Service	Quantity	Unit Name	GST Rate

Costing Summary
0 dissections

Settings
Other Entity purchasing location
Required 17-Oct-2023
Entered

Addresses
1 Sturt Road
BEDFORD PARK SA 5042
Australia

Authorisation History
2 Items

Attachments
0 Attachments

Click here to modify details