



Purchasing

Buying from the Internal OneFinance Catalogue

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Version Control

Date	Description of Change(s)	Owner
30/03/2020	<ul style="list-style-type: none">- Amended Procurement Policy section (page 11) which does not have to be completed when selecting a catalogue item.- Added a section on Settings (page 13-14) regarding transmission options and display amount options.	Daniel Bullimore

Buying from the Internal OneFinance Catalogue

This guide explains how to buy goods and services from the internal catalogue held on OneFinance.

Other purchasing guides are linked below.

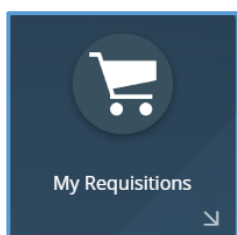
- [Buying from the Web Catalogue](#) - Office Depot Purchases
- [Buying Ad Hoc Items](#)- goods and services which are not in the internal catalogue
- [Raising a Blanket Order](#) - for regularly delivered products or services
- [How to Approve or Reject a Requisition](#)
- [How to Receipt Goods and Services](#)

A requisition is a request for purchase. When a requisition is approved, it becomes a purchase order and is sent to the supplier.

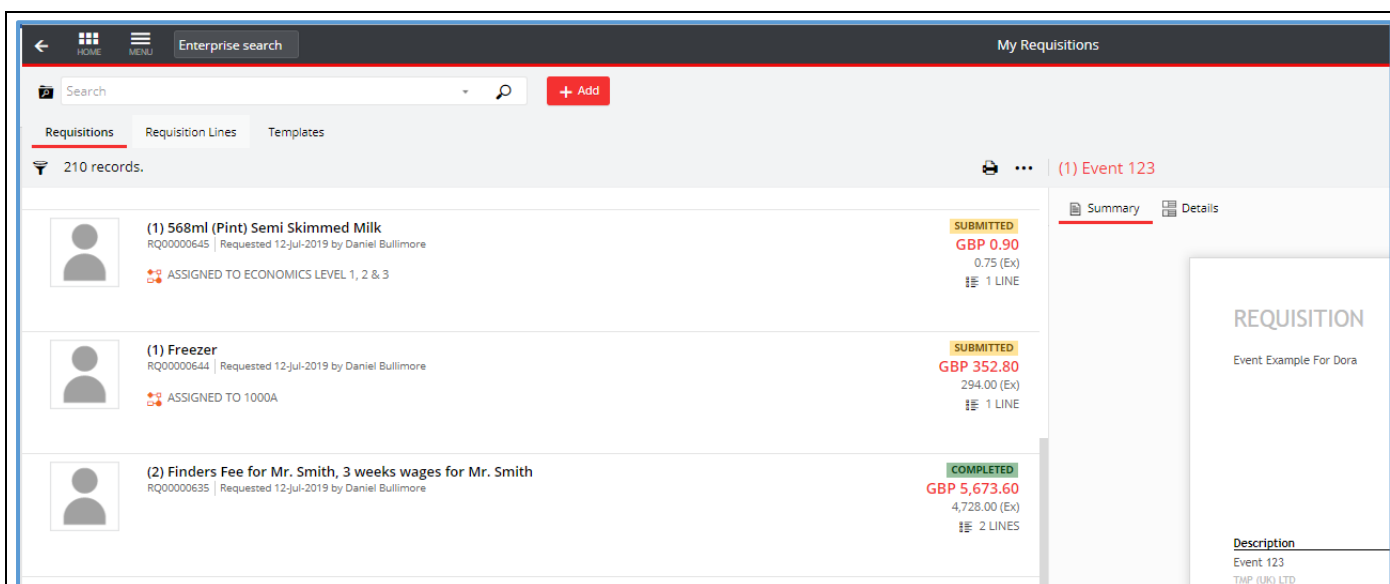
1. Login to OneFinance.
2. In the **Home** page click **My** on the role's navigation bar at the bottom of the screen.



3. Click on the **My Requisitions** tile.



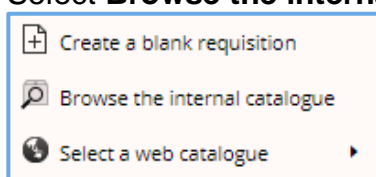
A list of the requisitions you have previously created is opened.



4. Click on the  button

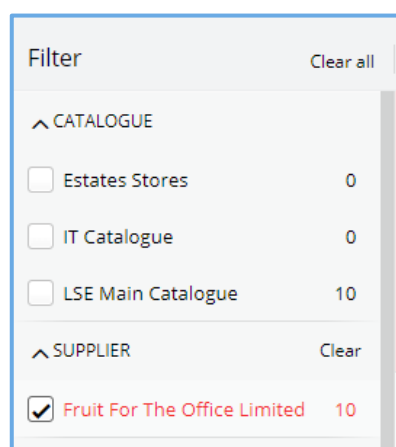
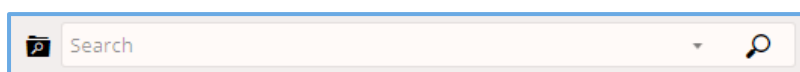
Browse the Internal Catalogue

5. Select **Browse the internal catalogue** from the list of options.




The list of items in the internal catalogue opens.

6. Use the filters in the Filters panel (left side of the screen) to find the items available, e.g. by the Supplier, or use the **Search Engine** to find what you want by entering part of the description or product number.



7. In the results, click on the item you require and review product information such as the description, amount (including and excluding VAT), the delivery time for delivery, and the quantity.



Fruit Box -The Fresh 20

FRESH20 | Fruit For The Office Limited | FRESH20 | Food & Drink

Fruit Box.90 pieces of fruit for up to 20 people. Includes: 30 x Bananas; 10 x Green Apples; 10 x Red Apples; 10 x Pears; 10 x Satsumas; 10 x Nectarine; 10 x Peaches.

GBP 43.19

35.99 (Ex)

EACH

🕒 2 DAYS

Quantity

Add

🔄

- When you click on an item, additional product information is displayed in natural view on the right like the example shown.

Fruit Box -The Fresh 20

(FRESH20)

Fruit Box.90 pieces of fruit for up to 20 people. Includes: 30 x Bananas; 10 x Green Apples; 10 x Red Apples; 10 x Pears; 10 x Satsumas; 10 x Nectarine; 10 x Peaches.

Fruit For The Office Ltd	Food & Drink
Standard	Non-Itemised
Inventory Tracking Allowed	✓
Discounts Allowed	✓
Replenished in Whole Units	✓
Categorisation System	SUNSPSC
Categorisation Code	-

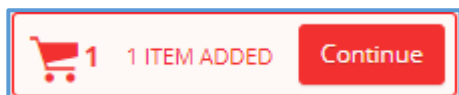
Specifications

8. If applicable, click into the **Quantity** field and specify the number of items you require.

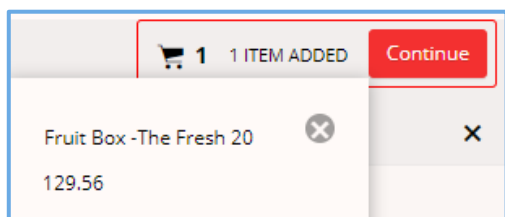
Quantity


9. Click on the **Add** button to place the item in the shopping cart.

The item is added to the shopping cart (top right corner of the screen), indicated like the example shown.



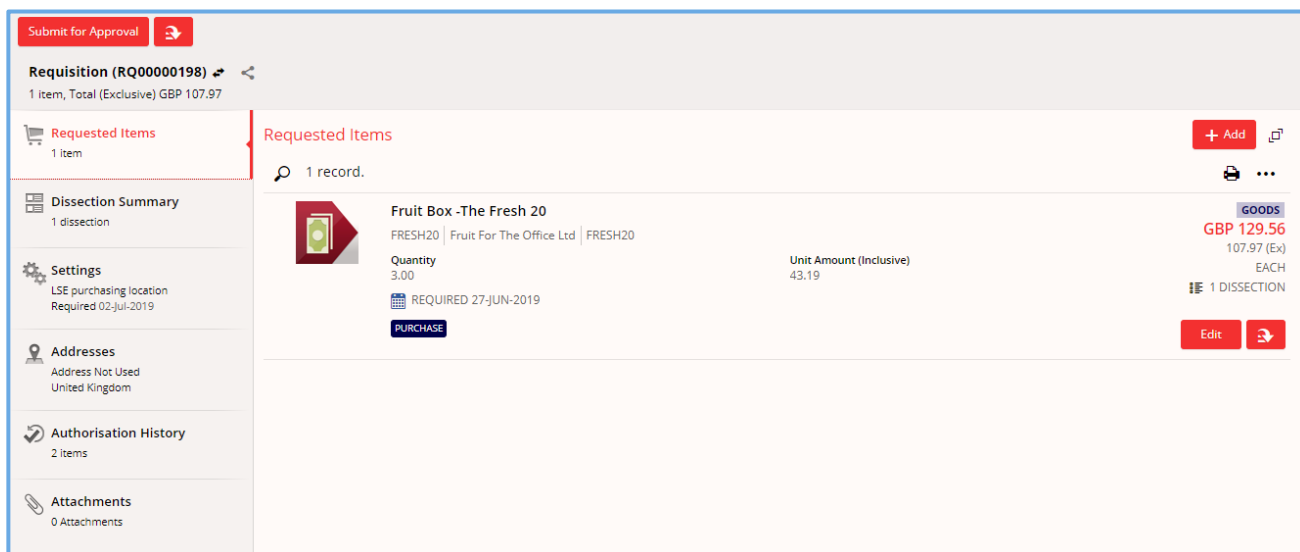
To review the contents, click on the shopping cart icon and a list of items is displayed like the example shown.



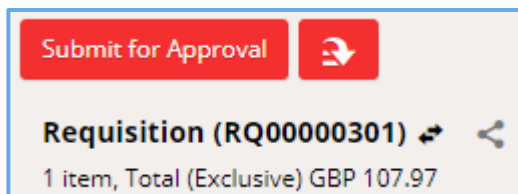
- You can also delete items by selecting  .
- Click the icon again to hide what is in the cart.

10. Click on the **Continue** button.

The item is added as a line in the requisition and a snapshot of its details is displayed in card view.



- The requisition number is displayed in the banner at the top left of the screen.

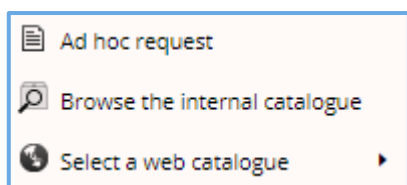


- A natural view of the requisition is displayed on the right like the example shown.

REQUISITION				UNAPPROVED	
			Requisition	RQ00000301	
			Reference		
			Issued	27-Jun-2019	
			Required	04-Jul-2019	
			Requisition User	General User	
			Requisition Total	GBP 129.56	
Description	Quantity	Unit	Unit Price (Exclusive)	Line Amount (Exclusive)	
Fruit Box -The Fresh 20	3.00	each	35.99	GBP 107.97	
Fruit For The Office Ltd - FRESH20					
Total				107.97	
Costing Summary					
Ledger	Account			Exclusive	Inclusive
GL	10.0.0000.1438.36213			107.97	GBP 129.56
19GLACT	LSE. Default. Academic and Pr. Office Consumab				
Total				129.56	

11. If you require more items, click on the + Add button.

- From the list of option click **Browse the internal catalogue** from the list of options.



The catalogue is re-opened.

12. Repeat steps 7 to 11 until you have added all the items that you require
In the example shown, two lines are included in the requisition

Requested Items				+ Add	
🔍 2 records. 🖨️ ⋮					
	Fruit Box -The Fresh 20 FRESH20 Fruit For The Office Ltd FRESH20	Quantity 3.00	Unit Amount (Inclusive) 43.19	GOODS GBP 129.56 107.97 (Ex) EACH 1 DISSECTION	PURCHASE Edit
	Washing Up Brush 168 Not Just Cleaning Ltd 168	Quantity 10.00	Unit Amount (Inclusive) 0.91	GOODS GBP 9.12 7.60 (Ex) EACH 1 DISSECTION	PURCHASE Edit

Additional Comments

Before the requisition can be submitted for approval, it is advised that you check the **Delivery Point** and **Cost Account** to be sure they are correct. This is also an opportunity for you to **add comments** to the requisition which will appear on the purchase order to the supplier.

13. Click on the button in the first requisition line item.



The requisition line opens and amendments can be made to the entry.

14. If desired enter text in the **Comment** field to provide information for the Supplier which will appear on the Purchase Order when the requisition is approved.

Delivery Point

15. Delivery Point: The item will be delivered to the post room address by default. If you wish to change the Delivery Point, you can search in the field for your Team/Division/Department.

Any Delivery Point that doesn't have '**Post Room**' in the description will be delivered direct to that Team/Division/Department. For example, if you select 'Finance Division', the order will be delivered to 5th Floor, Lionel Robbins Building, 10 Portugal Street, London, WC2 2HD.

Changing the Delivery Point does affect how the item is costed as it is links to the cost centre element in the Cost Account. If you want to know what cost centre a Delivery Point is linked to, select  on the Delivery Point field and select  Advanced search _____.

Delivery Point	Description
100	Post Room-Inter Academic Dept
101	Post Room-Inter Academic Dept
102	Economic History
103	Post Room-Inter Academic Dept
104	LSE Health
105	Economics
106	Post Room-Accounting
107	Post Room-Accounting Admin
<input type="checkbox"/> Advanced search	
479	

In the Delivery Point Advanced Search screen, you can search for the Delivery Point you want to use, and the cost centre description will be displayed in the **'More Information'** column.

Each cost centre has two delivery addresses – the post room delivery address and a direct delivery address (which should be used for Office Depot orders, for example).


If the Delivery Point you choose is linked to a different cost centre, this can be changed later at the Cost Account section of the requisition (see point 18).



Delivery Point ✕

finance division ▼ 🔍

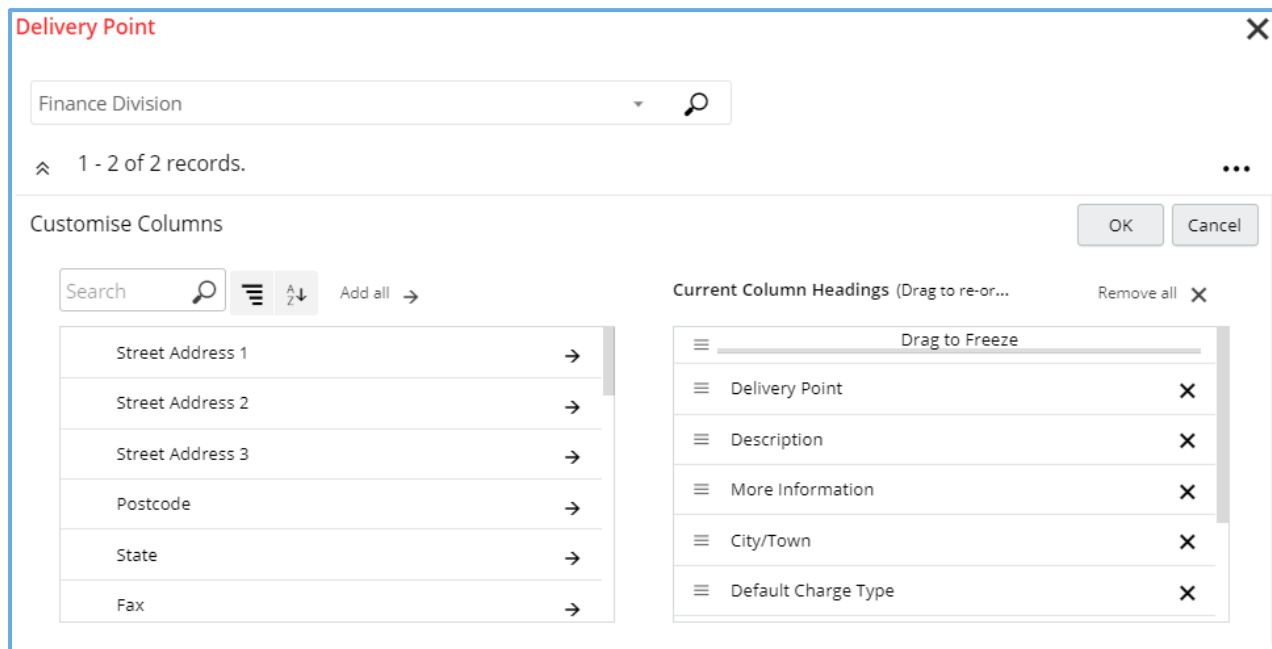
⤴ 1 - 2 of 2 records. ⋮

Delivery Point	Description	More Information	City/Town
478	Finance Division	Finance Discretionary	London
479	Post Room - Finance Division	Finance Discretionary	London

To view the exact address of the Delivery Point, please select **⋮** in the top right corner and then select  Customise columns.

You can then incorporate any information from the left side of the screen into your table by clicking on  and then click .


(e.g. Street Address 1, Street Address 2, Street Address 3, and Postcode).



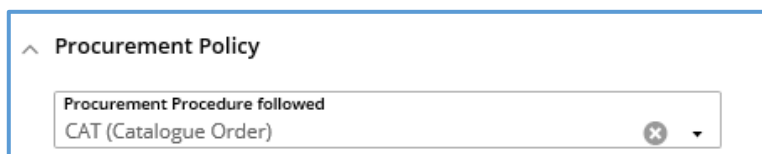
When you scroll across, the new columns will show in your table.

Procurement Policy

As you are raising a purchase order for a catalogue item, you **do not** have to complete the **Procurement Procedure followed** field. However, if you want to please see step 16 and 17. If you don't want to complete the field, please skip to step 18.

16. Scroll to the **Procurement Policy** section and click on the  in the **Procurement Procedure followed** field.

17. As you are creating an requisiton for goods from the internal catalogue, select **Catalogue Order** to indicate the procedure that was followed.



Cost Account

18. The **Cost Account** section shows the account string where the item will be charged. The account string is made up of:

- Entity** - which will default based on the cost centre selected
- Activity** - which will default based on the cost centre selected
- Cost Centre** - which will default based on the Delivery Point selected
- Nominal** - which will default based on the Commodity Code selected (already populated for catalogue items)

Cost Account

Charge Type *
UUKDEFAULT (Default Ite...)

Charge Code *
101301 (1301-Finance Disc...)

Ledger *
GL (19GLACT)


Account *
10.0.0000.1301.35203 (Food Cost...)

VAT Rate *
P1 (Partially Recoverable - ...)

Apply Cost Account To All Lines Add Another Cost Account

Each element of the account string (Entity, Activity, Cost Centre, and Nominal) can be changed, and we advise all staff to check the account string before submitting a requisition.

You can check the account string by selecting  on the **Account** field and selecting

 Advanced search

Cost Account

Charge Type *
UUKDEFAULT (Default I...)


Ledger *
GL (19GLACT)

VAT Rate *
P1 (Partially Recoverable - ...)

Apply Cost Account To All Lines Add Another Cost Account

10.0.0000.1015.10011 LSE. Default. Economics - Academic Activit

10.0.0000.1015.10012 LSE. Default. Economics - Academic Activit

 Advanced search

10.0.0000.1014.36213

From the **Components** tab, you are able to change the elements of the Account string. You do this by searching in the fields or by selecting the dropdown arrow.

Situations where you may change your account string include:

- You want to use a different Cost Centre to the one that is linked to the Delivery Point
- You are raising a requisition for a cost centre other than your own
- The item cost is to be divided between two or more cost centres

If you change your account string, you may receive a warning that states **You do not have Ledger security to access this account.** Please bear in mind that this is just a warning and you can continue to place your order.

19. For the vast majority of catalogue orders, you should **not** change the **VAT Rate**. This is defaulted based on your Division/Department, so please do not change it without consulting Procurement first.

20. Click the **Save** button and the requisition returns to card view.

Repeat steps 13 to 20 for each requisition line item.

Settings

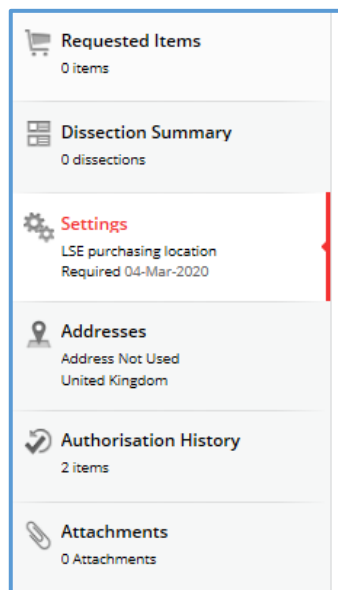
Within the **Settings** tab, you can dictate whether you want:


- The purchase order **sent** to the supplier or not. This will override the decision that the budget approver makes in relation to whether to transmit the order or not.

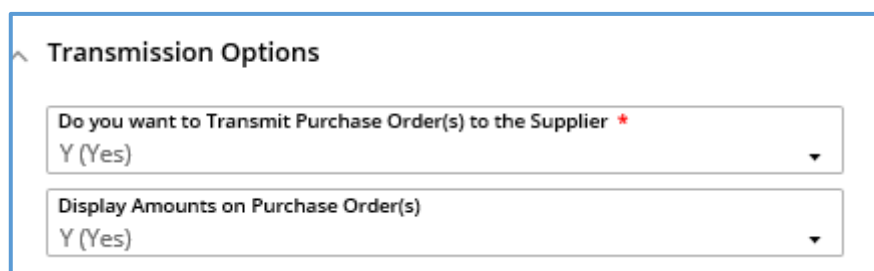
- The **amount** of the purchase order shown on the document that is sent to the supplier. The amount of the purchase order will still be visible in OneFinance even if you choose to hide it from the supplier.

Both options are defaulted to **Y (Yes)** as typically you want to send your purchase order to the supplier and you want them to know the amount of the order.

21. In the requisition pane, click on the **Settings** tile.



22. Scroll down to the bottom of the page to the **Transmission Options** section. Click on the  and change the option to **N (No)** if you do not want to send the purchase order to the supplier and/or you don't want to show the amount of the purchase order to the supplier.

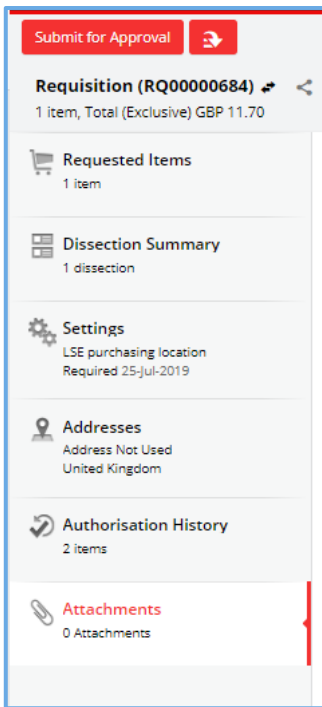


Attachments

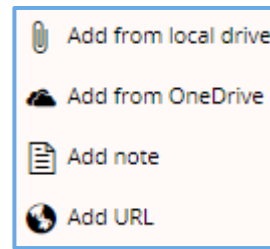
If applicable, add an attachment to support the request. Attachments are **not** sent to the supplier and are kept internally on OneFinance.

23. In the requisition pane, click on the **Attachments** tile.

25. Click the applicable option to upload the attachment. In this example “Add from local drive” has been selected.

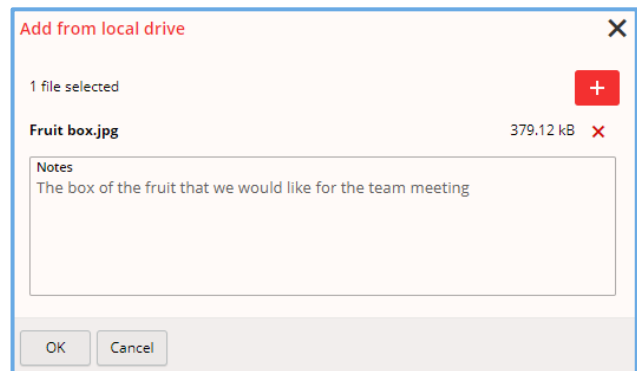


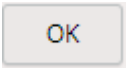
24. Click on the  button.

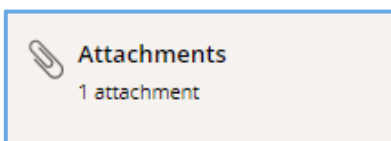


26. Navigate to the location where the supporting information is stored and upload it.

27. Add information in the Notes box to help the Approver when the requisition is reviewed.



28. Click on the  button
In the **Attachments** tile a number appears to indicate the number of attachments uploaded.






- When the requisition is complete it can be submitted to the budget holder to review and approve – see **Submit a Requisition for Approval** below for information.


Submit a Requisition for Approval



When the requisition is complete it can be submitted to the budget holder to review and approve.

Some requisitions will workflow to other teams before the budget holder, for example:


- **Procurement Pool** – any requisitions over £8000 will workflow to Procurement so they can check that you have attached either: three quotes, or single-source approval email, or a supplier contract.
- **IT Pool** – any requisitions where you are purchasing IT-related goods will workflow to DTS as they need to be made aware of equipment being delivered to their central store for asset tagging.
- **Payroll Pool** – any requisitions with a supplier who is self-employed or where the person is the Sole Director of their own personal service company will workflow to Payroll to check they have completed HMRCs Employment Status Questionnaire. This should be completed by the supplier prior to a requisition being raised.


<p>1. Click on the  button</p> <p>At the top of the screen a message is displayed which means the requisition has been automatically routed to the budget holder.</p> 	<ul style="list-style-type: none"> • The budget holder is sent an email notification to respond to the approval request. If there is more than one budget holder required to approve the requisition (e.g. for split budgets across one requisition), it will be routed to both budget holders. Everyone in the approval chain is notified in sequence via email when it their turn to authorise it.
<p>Authorisation History</p> <p>2. In the requisition card view, the requestor can click on the Authorisation History tile to check the status of the requisition in the approval chain.</p>	<p>3. Click on the  button in the header The Home page is reopened</p> <ul style="list-style-type: none"> • When the requisition is approved a purchase order is automatically generated and transmitted for each supplier the items have been requested from. The requisitioner also receives an email to confirm that the requisition has been authorised. • Once the supplier has delivered the goods or services the purchase order can be receipted. See the guide Goods Receipting for details.


Submit for Approval 


Requisition (RQ00000684)  


1 item, Total (Exclusive) GBP 11.70


 **Requested Items**
1 item

 **Dissection Summary**
1 dissection

 **Settings**
LSE purchasing location
Required 25-Jul-2019

 **Addresses**
Address Not Used
United Kingdom


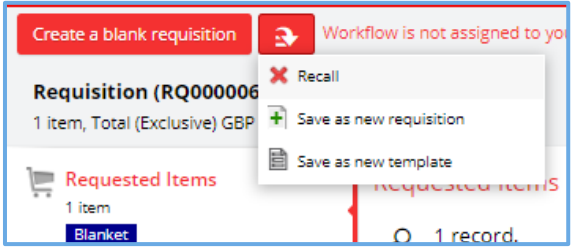
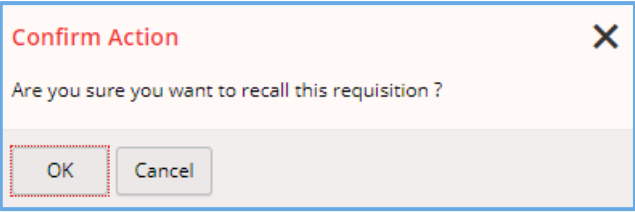

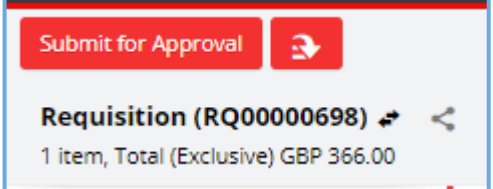
 **Authorisation History**
2 items

 **Attachments**
0 Attachments

Recalling a Submitted Requisition

Unapproved Requisition

- If you have submitted a requisition for approval, and it has not been approved, it is possible to recall it:

<p>1. If applicable re-open the requisition.</p> <p>2. Click on the  button at the top left of the page.</p>	<p>3. Click on Recall in the list of options.</p>  <p>The screenshot shows a requisition summary for 'Requisition (RQ000006)' with '1 item, Total (Exclusive) GBP'. A dropdown menu is open, showing options: 'Recall', 'Save as new requisition', and 'Save as new template'. The 'Recall' option is highlighted with a red 'X' icon.</p>
<p>The Confirm Action prompt is displayed.</p>  <p>The dialog box is titled 'Confirm Action' and asks 'Are you sure you want to recall this requisition?'. It has 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red dashed border.</p> <p>4. Click on the  button.</p>	<ul style="list-style-type: none"> The button at the top of the page reverts to Submit for Approval  <p>The screenshot shows the requisition card for 'Requisition (RQ00000698)' with '1 item, Total (Exclusive) GBP 366.00'. The 'Submit for Approval' button is now visible at the top of the card, along with a recall icon.</p> <p>5. Make the necessary amendments and re-submit the requisition when required.</p>

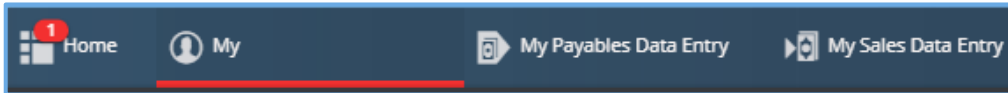
Cancelling a Requisition

Note that a requisition cannot be cancelled as it is just a request and not a purchase order. The requisition can be recalled (as per the above section), and the requisition number recycled again when you want to raise a new order next time.

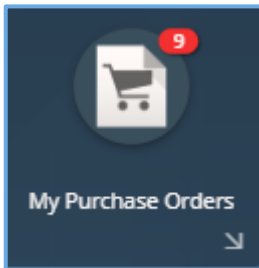
Approved Requisition

When a requisition is approved it cannot be amended as a purchase order (PO) is automatically generated. You can however amend the corresponding PO and submit it to the budget holder to approve. It would also be a good idea to contact the Supplier to let them know as well if you intend to amend a PO.

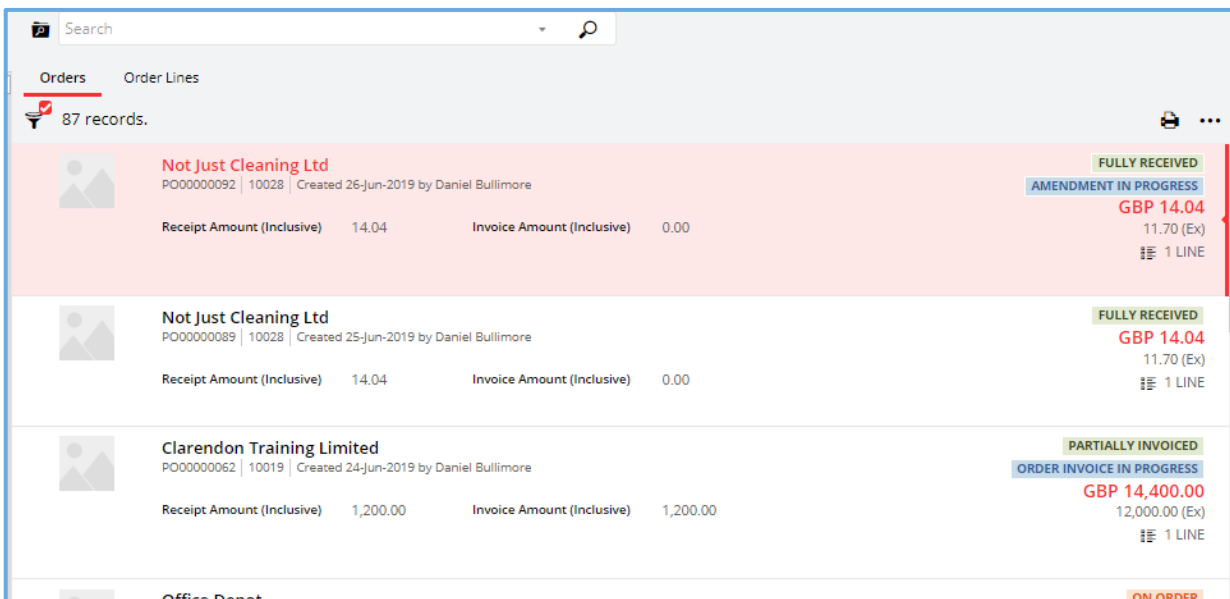
1. Login to OneFinance.
2. In the **Home** page click **My** on the role's navigation bar at the bottom of the screen.



3. Click on the **My Purchase Orders** tile



A list of your purchase orders opens in card view.



4. Click on the applicable order line that you would like to amend.

A natural view of the order is displayed on the right like the example shown.

PURCHASE ORDER ON ORDER

<p>Fruit For The Office Ltd Suite 135, 176 South Street Essex Romford RM1 1BW</p> <p>Attention Victoria Harden</p>	<p>Order LS10000035</p> <p>Vendor 10027</p> <p>Issued 28-Jun-2019</p> <p>Required 29-Jun-2019</p> <p>Currency GBP</p> <p>Requisition User General User</p>
--	--

	Ordered		Received		Invoiced	
Description	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)
Fruit Box -The Fresh 20 FRESH20	3.00	107.97	0.00	0.00	0.00	0.00
Total		107.97		-		-

5. Click on the View button in the top right corner of the screen.

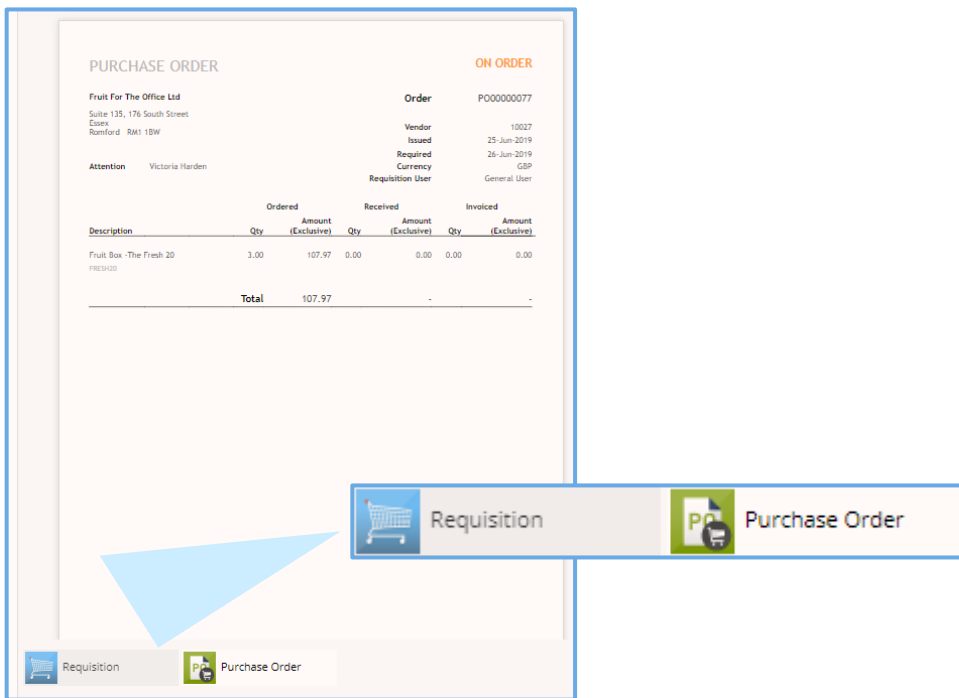
The requested item that you would like to amend is displayed like the example shown.

Requested Items 🗖

🔍 1 record. 🖨 ...

	<p>Fruit Box -The Fresh 20</p> <p>RQ00000147 General User FRESH20</p> <p>Unit Amount (Inclusive) 43.19 Receipt Amount (Inclusive) 0.00 Invoice Amount (Inclusive) 0.00</p> <p> REQUIRED 26-JUN-2019</p>	<p>GOODS ON ORDER</p> <p style="color: #e67e22; font-weight: bold;">GBP 129.56</p> <p>107.97 (Ex)</p> <p>EACH</p> <p> 1 DISSECTION</p> <p style="text-align: center; margin-top: 10px;">View</p>
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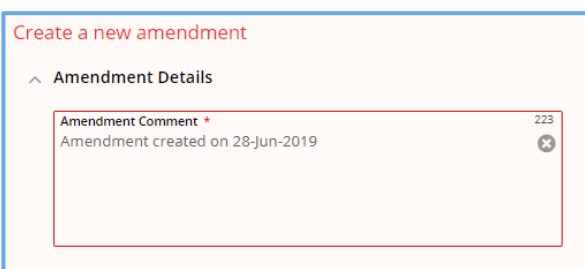
- If required, in the natural view (on the right side of the screen), you can switch between the purchase order and corresponding requisition by clicking on the relevant button.



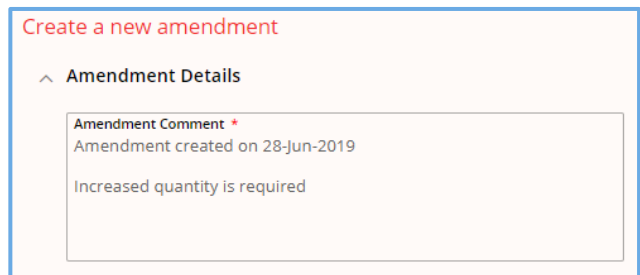
Create Amendment

6. Click the **Create amendment** button.

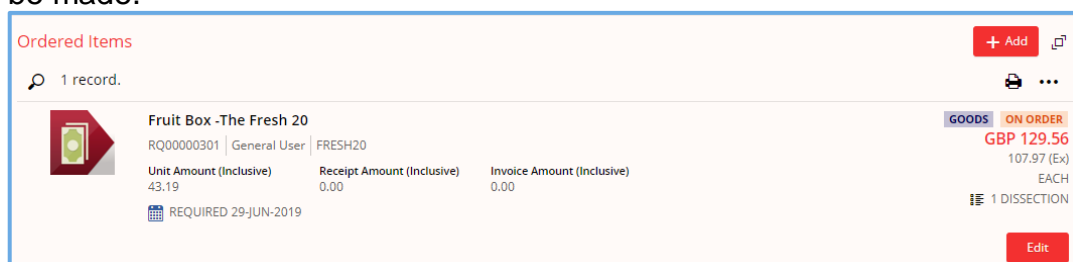
The **Create a new amendment** prompt is displayed.



7. Enter an explanation to help the budget holder to approve the purchase order when it is resubmitted.



8. Click the **Save** button. The order line is reopened in card view and ready for alterations to be made.



9. Click on the  button to amend the order line.

The purchase order is displayed on the right-hand side in natural view, and indicates that an amendment is in progress.

PURCHASE ORDER AMEND IN PROGRESS

<p>Fruit For The Office Ltd Suite 135, 176 South Street Essex Romford RM1 1BW</p> <p>Amendment Reason Amendment created on 02-Jul-2019</p> <p>Increased quantity is required</p>	<p>Order Reference LS10000035</p> <p>Issued 28-Jun-2019</p> <p>Required 29-Jun-2019</p> <p>Currency GBP</p> <p>Requisition User General User</p> <p>Amendment User General User</p>
--	---

	Current Approved		Amended	Difference
Description	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)
Fruit Box -The Fresh 20 FRESH20	3.00	107.97	3.00	107.97
Total		107.97		107.97

	Current Approved		Amended	Difference
Ledger Account	Amount (Exclusive)	Amount (Exclusive)	Amount (Exclusive)	Amount (Exclusive)
GL 10.0.0000.1438.36213	107.97	107.97		
19GLACT LSE. Default. Academic and Pr. Office Consumab				
Total		107.97		107.97


10. Modify the applicable field(s). In this example the quantity will be increased from 3 to 5.

11. Click on the  button when the amendments are completed.

- The order line is reopened in card view with the added status of **Amended**.

Ordered Items + Add

🔍 1 record. 🖨️ ...



Fruit Box -The Fresh 20

RQ00000147 | General User | FRESH20

Unit Amount (Inclusive) 43.19 Receipt Amount (Inclusive) 0.00

Invoice Amount (Inclusive) 0.00

📅 REQUIRED 26-JUN-2019


AMENDED GOODS ON ORDER

GBP 215.94

179.95 (Ex)

EACH

📋 1 DISSECTION



The updated purchase order is displayed on the right-hand side in natural view.

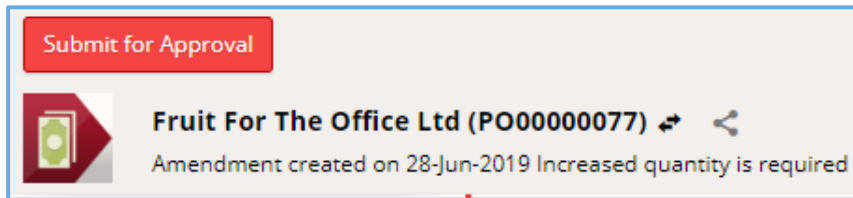
PURCHASE ORDER AMEND		IN PROGRESS		
Fruit For The Office Ltd Suite 135, 176 South Street Essex Romford RM1 1BW		Order Reference PO00000077	Issued 25-Jun-2019	
Amendment Reason Amendment created on 02-Jul-2019 Increased quantity is required		Required 26-Jun-2019	Currency GBP	
		Requisition User General User	Amendment User General User	
		Current Approved	Amended	Difference
Description	Qty	Amount (Exclusive)	Qty	Amount (Exclusive)
Fruit Box -The Fresh 20 FRESH20	5.00	179.95	5.00	179.95
Total		179.95	179.95	-
Costing Summary		Current Approved	Amended	Difference
Ledger	Account	Amount (Exclusive)	Amount (Exclusive)	Amount (Exclusive)
GL	10.0.0000.1433.36213	179.95	179.95	
19GLACT	LSE, Default, Misc Lib, Office Consumab			
Total		179.95	179.95	-

- If desired, in the natural view, you can additionally switch to the amended view of the order.

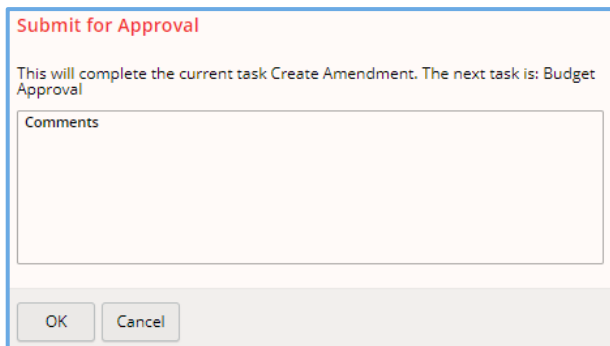
The screenshot displays the 'PURCHASE ORDER AMEND' screen in 'IN PROGRESS' status. It shows details for 'TWP (UK) LTD' and 'Order L510000144'. The table below the details shows a single line item 'Event 123' with a quantity of 1,000.00 and an amount of 1,000.00. The 'Total' row shows 1,000.00 for both current approved and amended amounts, with a difference of 0.00. The 'Costing Summary' table shows the ledger account '10.0.0000.1173.36213' with an amount of 1,000.00. At the bottom, a navigation bar contains three buttons: 'Requisition', 'Purchase Order', and 'Amendment'. A blue arrow points to the 'Amendment' button, indicating the user can switch to that view.

12. Click on the  button at the top of the page.

- The comment that you entered earlier appears just below the button.

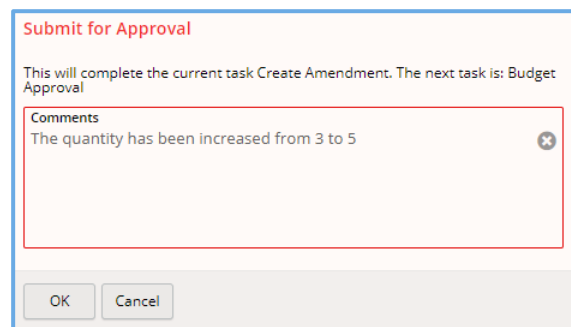



• The **Submit for Approval** box opens.

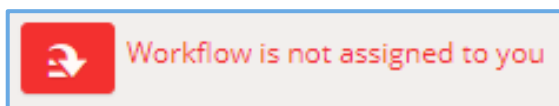



13. Enter an explanatory comment for the budget holder.

In the example the comment reflects that the quantity has increased.



14. Click on the  button.
At the top of the screen a message is displayed which means the requisition has been automatically routed to the budget holder to approve.



15. Click on the  button in the header to return to the Home page.