



Purchasing

How to Approve or Reject a Requisition

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Version Control

Date	Description of Change(s)	Owner
30/03/2020	<ul style="list-style-type: none"><li data-bbox="360 414 1155 517">- Amended Approve and Auto Transmit description on page 5 where the requisitioner choice overrules the ability to send the purchase order or not.<li data-bbox="360 526 1155 629">- Amended Approve (No Transmission) description on page 6 where the requisitioner choice overrules the ability to send the purchase order or not.	Daniel Bullimore

How to Approve or Reject a Requisition

This guide explains what actions are available to Budget Holders when they receive a requisition.

Purchasing guides are linked below.

- [Buying from the Internal OneFinance Catalogue](#) – frequently purchased items held in the internal OneFinance catalogue.
- [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 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.

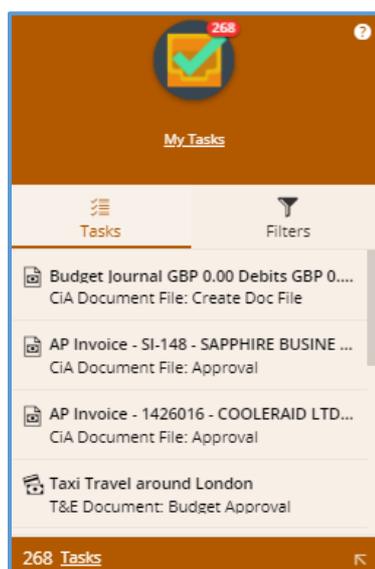
Getting Started

1. You will receive an email from OneFinance when there is a requisition that requires your attention. From the email, you will be prompted to login into OneFinance with the following message: To view this in Ci Anywhere, [click here](#).

2. Login to OneFinance.

3. The link will take you directly to the **My Tasks** tile.

If you don't login via the link on the email, then you will need to select  and then the **My Tasks** tile.



4. In the My Tasks tile you can see all the tasks that require your actioning in OneFinance. They are listed with the most recent tasks at the top.

My Tasks View

5. When you choose a requisition to approve/reject, you will be able to see information relating to that requisition in the following sub-sections:
- **Summary** – Includes task description, who the requisition is assigned to, and when it was received.
 - **Process View** – Tracks where the requisition is in the process, who created the requisition, and when it was created.
 - **Details** – Illustrates the requisition type; the requisition date; the date the goods/services are required by; the priority; the purchasing location; attachments; purchase lines; and dissection summaries (budget code).
 - **Workflow Information** – States the process and the originator.

(1) Health & Safety Training - GBP 12,000.00
Approve and Auto Transmit
↻

^ Summary

Task Description
Budget Approval

Assigned to
Anthropology Level 2 & 3

Received
12-Jul-2019 09:24:58

^ Process View

▼ Create Requisition
Daniel Bullimore

Budget Approval
Anthropology Level 2 & 3

Generate Documents

Notify Approve

Process Completion

^ Details

Requisition Type
Requisition

Requisition Date
12-Jul-2019

Date Required
19-Jul-2019

Priority
Normal

Purchasing Location
LSE

Attachments

Quote 1.docx

⋮

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

REQUISITION		UNAPPROVED	
Requisition		RQ00000630	
Reference			
Issued		12-Jul-2019	
Required		19-Jul-2019	
Requisition User		Daniel Bullimore	
Requisition Total		GBP 10,000.00	
Purchase Items			
Description	Quantity	Unit	Line Amount (Exclusive)
Health & Safety Training Clarendon Training Limited	-	only	GBP 10,000.00
Total			10,000.00
Costing Summary			
Ledger	Account	Exclusive	Inclusive
PJ	100165.O.000.1006.1006.34005	10,000.00	GBP 12,000.00
19PJACT	General Departm. Operational - C. Default. Staff Research. Anthropology -. IT Equipment		
Total			12,000.00

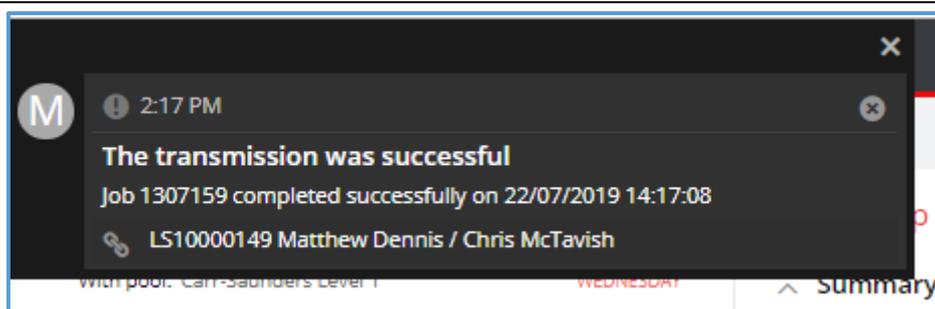
Approve and Auto Transmit – Approves the requisition which generates a purchase order that is emailed to the supplier, unless the Requisitioner has chosen the option on the requisition not to send the order to the supplier, in which case your decision is overruled.

6. Select Approve and Auto Transmit and you will receive a message that states that the requisition has been released as a purchase order. The requisitioner will also receive an email to confirm you have approved the requisition.

SAVED AND 2 INFORMATION MESSAGES ×

- i Requisition RQ00000640 released as Order LS10000149.
- i Order LS10000149 has been submitted to the processing engine for printing.
- ✔ Successfully performed Approve and Auto Transmit.

7. You will then receive a message in the top left of your screen to state whether the transmission (email) was successful or not.

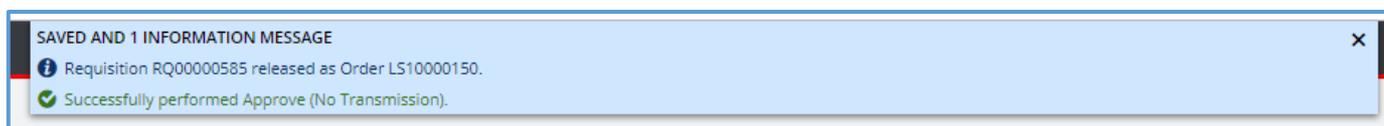
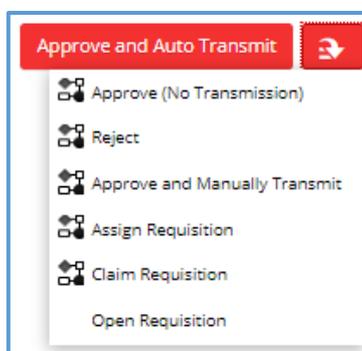


If you receive a message to state that the transmission was unsuccessful, you need to contact the operational procurement team via the [Finance Division Enquiry Form](#), selecting Purchasing > Purchase Order.

Other Actions Available

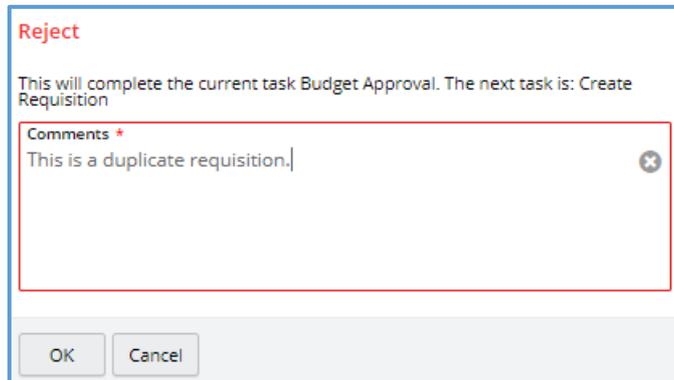
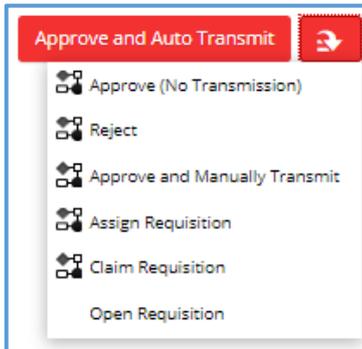
Approve (No Transmission) – Approves the requisition which generates a purchase order number, but the purchase order does not get emailed to the supplier (unless the Requisitioner has chosen the option on the requisition to send the order to the supplier, in which case your decision will be overruled).

- 8.1. Select  followed by  Approve (No Transmission) and you will receive a message that states that the requisition has been released as a purchase order. The requisitioner will also receive an email to confirm you have approved the requisition.



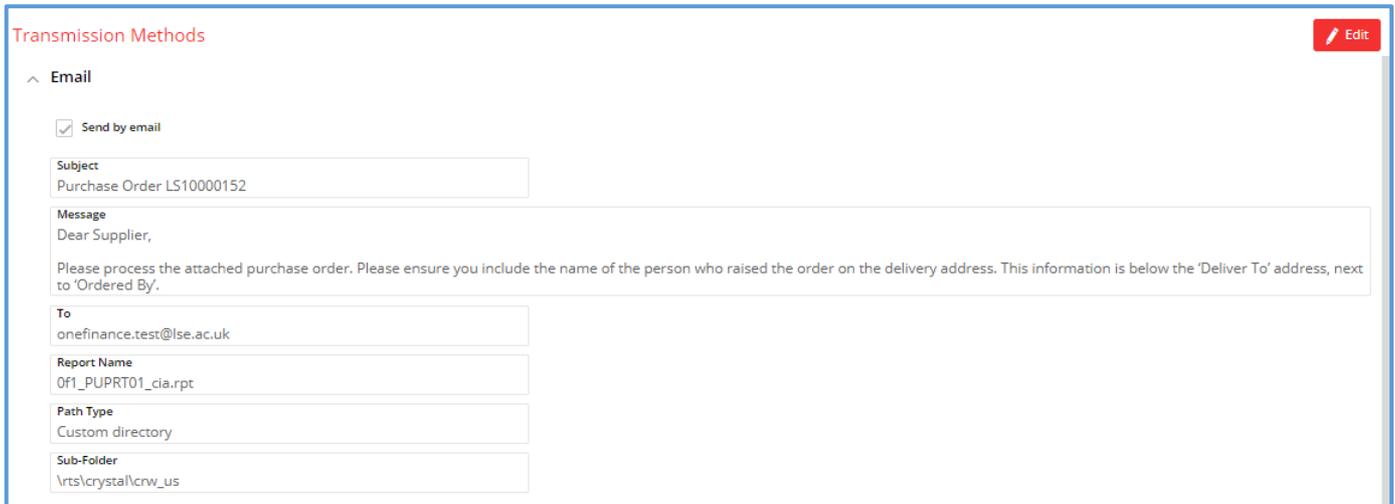
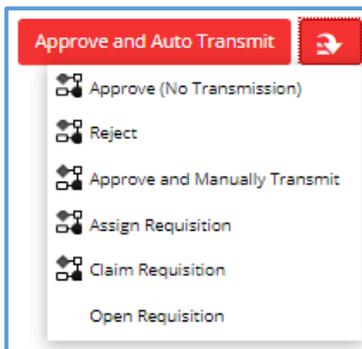
Reject – Rejects the requisition back to the requisitioner. If you reject a requisition, OneFinance will prompt you to include a comment as to why you have rejected.

- 9.1. Select  followed by  Reject and a mandatory Comments field will appear. You will need to include a reason for rejecting the requisition and then click . The requisitioner will also receive an email to confirm you have rejected the requisition and the reason for the rejection.



Approve and Manually Transmit – Approves the requisition which generates a purchase order, but you will have to input the email address that the purchase order is sent to (i.e. an Account Managers email address, or you own email address).

10.1. Select  followed by  and you will be taken to the Transmission Methods screen.



10.2. Select  and in the 'To' field, amend it to the email address you want to email the purchase order to.

Subject *

Purchase Order LS10000152

Message

Dear Supplier,

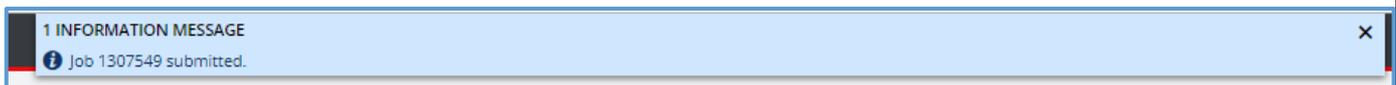
Please process the attached purchase order. Please ensure you include the name to 'Ordered By'.

To *

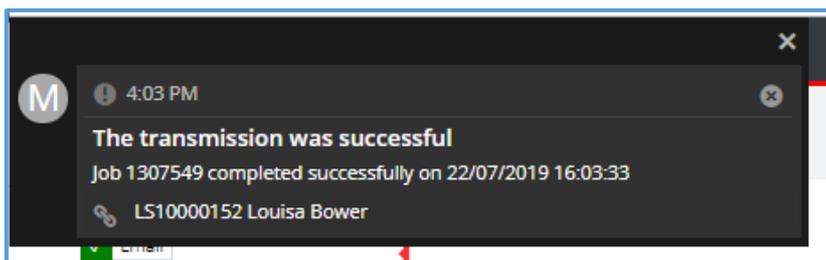
d.c.bullimore@lse.ac.uk 232

10.3. Click **Save** followed by **Transmit** (top left corner of the screen).

10.4. You will receive a message to say that the job has been submitted.



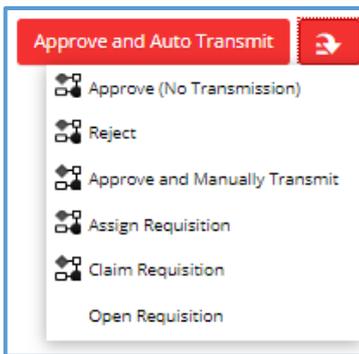
10.5. You will then receive a message at the top left of your screen to state whether the transmission (email) was successful or not.



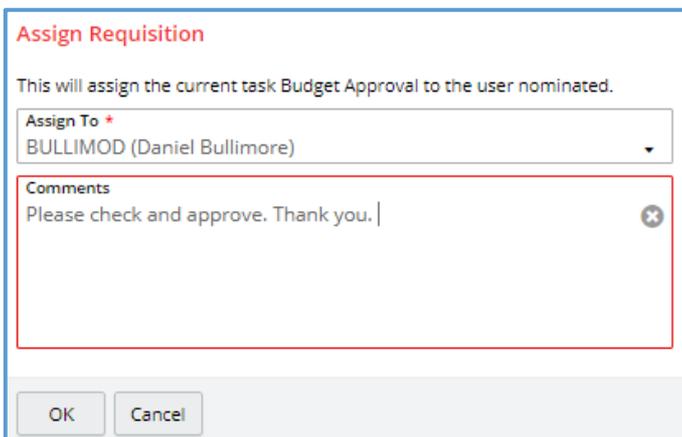
If you receive a message to state that the transmission was unsuccessful, you need to contact the operational procurement team via the [Finance Division Enquiry Form](#), selecting Purchasing > Purchase Order.

Assign Requisition – Allows you to assign the requisition to someone else to approve.

11.1. Select **Assign Requisition** followed by **Assign Requisition** and an Assign Requisition field will appear.



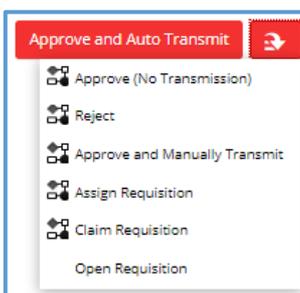
11.2. Type the person's name you want to assign the requisition to and add a comment. Once completed, click 



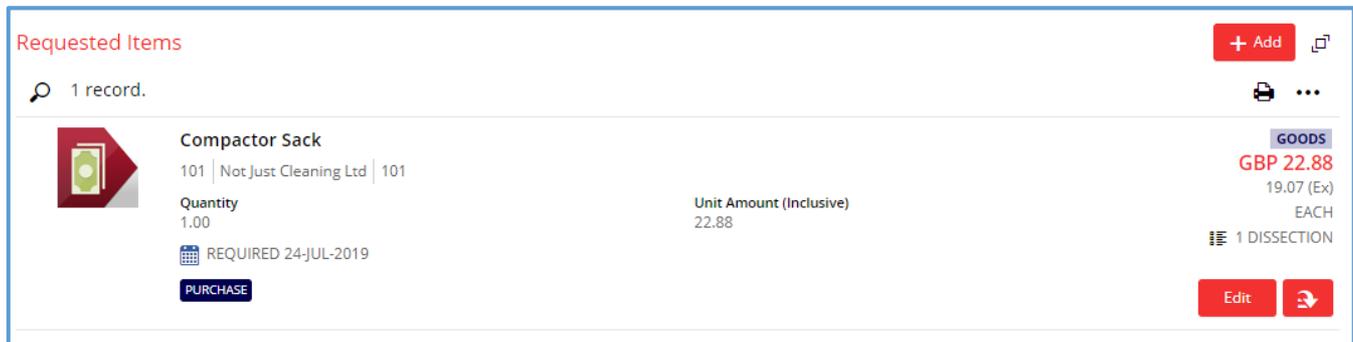
11.3. The person who you assigned the requisition to will receive an email to approve the requisition.

Claim Requisition – Allows you to claim the requisition as your own. You can then amend the requisition and can choose whether to return it to the workflow pool or approve yourself.

12.1. Select  followed by  **Claim Requisition**. The requisition will temporary go through the system and appear at the top of the **My Tasks** function. If this doesn't happen, please click refresh  on your browser.



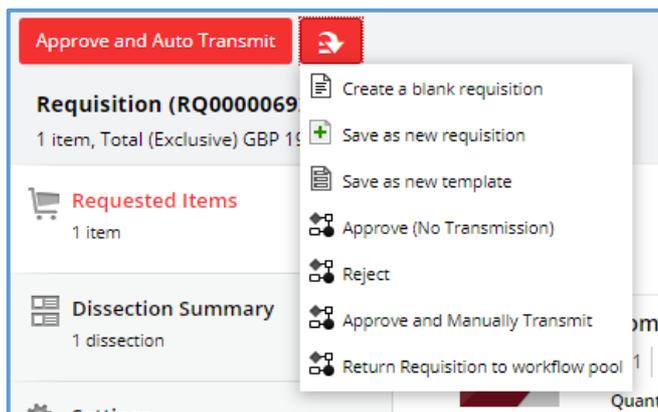
12.2. Once the requisition returns at the top of the My Tasks function, select  followed by **Open Requisition** which will take you to the requisition screen.



12.3. Click  and make the necessary amendments. Once the changes have been made, please select  in the top right corner.

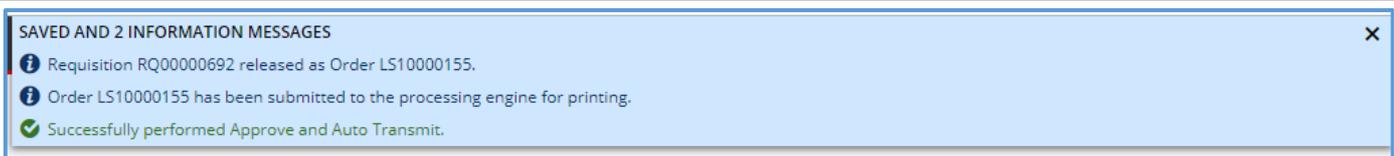
You can now either:

12.4.1. Return the Requisition to the Workflow Pool to be approved by someone else in the pool. You can do this by selecting  followed by  **Return Requisition to workflow pool**

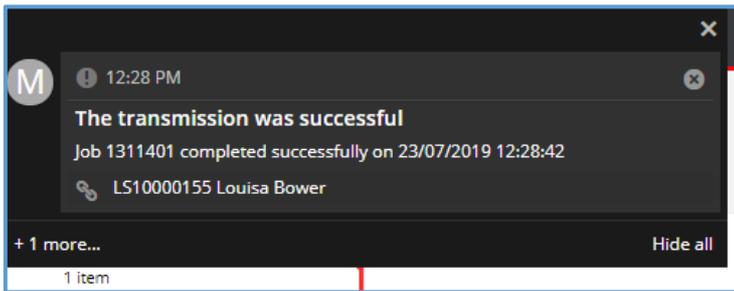


OR

12.4.2. You can select  to approve the requisition yourself. You will receive a message that states that the requisition has been released as a purchase order. The requisitioner will also receive an email to confirm you have approved the requisition.



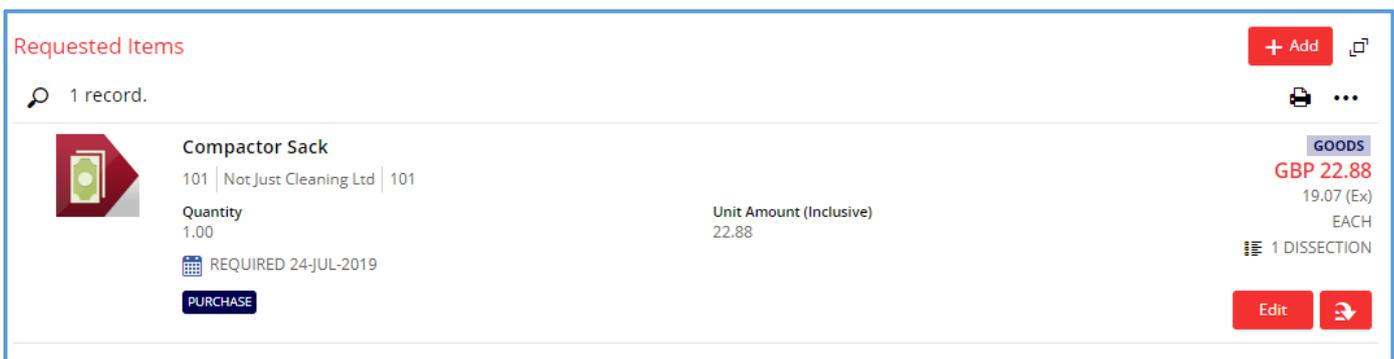
12.5. You will then receive a message in the top left of your screen to state whether the transmission (email) was successful or not.



If you receive a message to state that the transmission was unsuccessful, you need to contact the operational procurement team via the [Finance Division Enquiry Form](#), selecting Purchasing > Purchase Order.

Amend Requisition – Allows you to open the requisition and make amendments without sending it back to the Workflow Pool.

13.1. Select  followed by [Open Requisition](#) which will take you to the requisition screen and allow you to make changes.



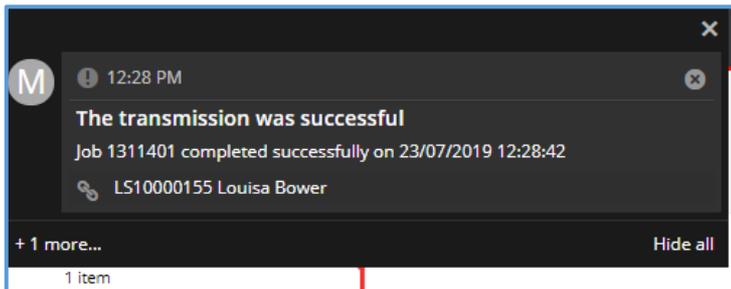
13.2. Click  and make the necessary amendments. Once the changes have been made, please select  in the top right corner.

13.3. You can then select  to approve the requisition yourself. You will receive a message that states that the requisition has been released as a purchase order. The requisitioner will also receive an email to confirm you have approved the requisition.

SAVED AND 2 INFORMATION MESSAGES

- Requisition RQ00000692 released as Order LS10000155.
- Order LS10000155 has been submitted to the processing engine for printing.
- Successfully performed Approve and Auto Transmit.

13.4. You will then receive a message in the top left of your screen to state whether the transmission (email) was successful or not.



If you receive a message to state that the transmission was unsuccessful, you need to contact the operational procurement team via the [Finance Division Enquiry Form](#), selecting Purchasing > Purchase Order.