

# Procurement

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## Introduction

This is an advanced guide which covers a range of additional functionality in the purchasing module on OneFinance. This guide **does not** cover the basic steps of how to raise an order in OneFinance. As such, you should be accustomed with the following guides before reading this guide:

- [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 Approve or Reject a Requisition](#)
- [How to Receipt Goods and Services](#)

## Ordering

### Ad hoc IT Ordering

When you are ordering IT hardware, software or services which are **not** on the OneFinance catalogue, you need to contact the DTS support team first on [It.ServiceDesk@lse.ac.uk](mailto:It.ServiceDesk@lse.ac.uk) to discuss your requirements. Once they approve your purchase and/or provide you with a quote, you will then be asked to place your order on OneFinance.

You should follow the [Buying Ad Hoc Items](#) guide up to **step 8**.

1. You will need to complete the empty fields which should reflect (in detail) the service or goods you are purchasing. If you have been provided with a quote, the requisition should replicate the information on the quote.

← Requested Items

Add New Requested Item

Supplier

Supplier \*  
10071 (DTP Group)

Currency  
British Pounds Sterling (GBP)

Address  
001 (Primary Address)

Supplier Ledger  
AP - LSE (P1)

Account  
10071 (Desk Top Publishing)

Item

Description \*  
HP 27" Ultra Slim Monitor

Long Description  
HP 27" Ultra Slim Monitor

Supplier Product

Comment  
Part Number: 4TB31AA#ABU  
DTP Quote Reference: LSE-IT123  
FAQ Daniel Bullimore

1921

Goods/Service \*  
Goods

Due \*  
19-Aug-2019

VAT Rate \*  
S (Standard Ra...)

Quantity  
1

Unit Name \*  
ONLY

Unit Amount (Exclusive)  
199.00

Line Amount (Exclusive)  
199.00

2. You will then need to ensure any IT goods are delivered to DTS so that they can asset tag them. Therefore, the **Delivery Point** needs to be amended to **110 (DTS Administration)**

Delivery Point Type \*  
UUKGEN (LSE Delivery Poi...

Delivery Point \*  
110 (DTS Administration)

3. Change the **Purchase Type** from General Purchase to **Asset Purchase**. The Asset Register and Template Asset field will appear. Depending on whether you are ordering equipment or software, in the **Template Asset** field, please select either:

- 109997 (IT Equipment Template)
- OR
- 109999 (IT Software Template)

Purchase Type \*  
Asset Purchase

Asset Register  
LSE

Template Asset  
109997 (IT Equipment Tem...

#### 4. You should then complete the following:

- Input a relevant **Commodity Code**
- Input your **IT Service Desk Number** which you received when you discussed your requirements with DTS.
- Amend the answer to **If this is an IT purchase, does it need to be delivered to IT** from No to **Yes**
- Select the appropriate **Procurement Procedure followed**

##### ^ Categorisation

Commodity Code \*  
43211900 (Computer displays) ▼

##### ^ IT Procurement

IT Service Desk Number  
79599

If this is an IT purchase, does it need to be delivered to IT? \*  
Y (Yes) ▼

##### ^ Procurement Policy

Procurement Procedure followed \*  
1SS (Single Source <£8K) ▼

Contract / Framework Reference No.

Additional Comments for Procurement

5. As you are using the DTS Administration Delivery Point, the **Cost Centre** in your account string will need amending to your Divisions/Departments/Teams cost centre, hence why it defaults to @@@@.

##### ^ Cost Account

Charge Type \*  
UUKDEFAULT (Default It...

Charge Code \*  
IT\_CATALOG (IT Catalogue) ▼

Ledger \*  
GL (19GLACT)

Account \*  
10.0.0000.@@@@.34005 (IT Equip...

VAT Rate \*  
P1 (Partially Recoverable - ... ▼

☐ Apply Cost Account To All Lines ☐ Add Another Cost Account

- You can change the account string by selecting the dropdown arrow ▼ on the **Account** field and selecting **Advanced Search**

**Cost Account**

10.0.0000.1000.33001 LSE: Default. Inter Acade

Charge Type \*  
UUKDEFAULT (Default Ite...

Ledger \*  
GL (19GLACT)

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

☐ Apply Cost Account To All Lines ☐ Add Another Cost Account

- 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. For IT Orders in particularly, you will need to amend the **Cost Centre**. Once the Cost Centre has been amended, click **OK**.

**Account**

**Components** Accounts

Entity 10 (LSE)

Activity 0000 (Default)

Cost Centre 1036 (Finance - Administration)

Nominal Account 34005 (IT Equipment)

10.0.0000.1036.34005

OK Cancel

- Click the **Save** button in the top right corner and the requisition returns to card view.
- Select **Submit for Approval**. The requisition will then go to the **IT Pool** to check the details are correct.

**Submit for Approval**

**Requisition (RQ00000752)**

1 Item, Total (Exclusive) GBP 199.00

**Requested Items**

1 Item

**Dissection Summary**

1 dissection

**Settings**

LSE purchasing location  
Required 05-Aug-2019

**Addresses**

Address Not Used  
United Kingdom

**Requested Items**

1 record.

**HP 27" Ultra Slim Monitor**

DTP Group

Quantity 1.00

REQUIRED 19-AUG-2019

PURCHASE ASSET

Unit Amount (Inclusive) 238.80

**GOODS**

**GBP 238.80**

199.00 (Ex) ONLY

1 DISSECTION

Edit

## Splitting a Requisition Between Two Budget Codes

Products/service cost can be split between different divisions by adding cost accounts to the requisition line. Each requisition line can be split (cost accounts added) between/divided to as many divisions as needed.

1. Got to the **Cost Account** section of a Requisition line (at the bottom)
2. Tick the box **Add Another Cost Account**.

### ^ Cost Account

Charge Type *	Charge Code *
UUKDEFAULT (Default It...	101036 (1036-Finance - Ad...
Ledger *	Account *
GL (19GLACT)	10.0.0000.1036.36213
VAT Rate *	
P1 (Partially Recoverable - ...	
<input type="checkbox"/> Apply Cost Account To All Lines	<input type="checkbox"/> Add Another Cost Account

3. You would then need to input the **VAT Exclusive** amount into the **Dissection Amount (Exclusive)** field based on how much you want to charge each budget from the total cost.

In the below example, the total cost of the item is £20 (VAT exclusive) and I am splitting £5 on one budget and £15 on another.

The requisition will then need to be approved by both Budget Approvers.

### ^ Cost Account 1

Charge Type *	Charge Code *
UUKDEFAULT (Default It...	101081 (1081-Law - Acade...
Ledger *	Account *
GL (19GLACT)	10.0.0000.1081.36213 (Office Con...
VAT Rate *	Dissection Amount (Exclusive)
P1 (Partially Recoverable - ...	5.00



### ^ Cost Account 2



Charge Type *	Charge Code *
UUKDEFAULT (Default It...	101106 (1106-Mathematic...
Ledger *	Account *
GL (19GLACT)	10.0.0000.1106.36213 (Office Con...
VAT Rate *	Dissection Amount (Exclusive)
P1 (Partially Recoverable - ...	15.00

☐ Add Another Cost Account ☐ Delete this cost account



## Duplicating and Deleting a Requisition Line

Once you've raised one requisition line, you can duplicate it to save you re-typing all the details.

- Next to Edit button on each line you will see the Action button . Click  and select **Create Duplicate**. This action will create the exact same line which you can then edit.

	HP EliteDisplay E223 21.5-inch Monitor		GOODS
	1FH45AALSE   DTP Group   1FH45AALSE		GBP 141.59
	Quantity 1.00	Unit Amount (Inclusive) 141.59	117.99 (Ex) EACH
	REQUIRED 21-JUL-2019		1 DISSECTION
PURCHASE NOT FULLY COSTED ASSET		<div> <div>Edit</div> <div></div> </div>	
		<div> <div>Create duplicate</div> <div>Delete</div> </div>	

If you make a mistake, you can also delete the line.

- Next to Edit button on each line you will see the Action button . Click  and select **Delete**. This action will delete the requisition line.

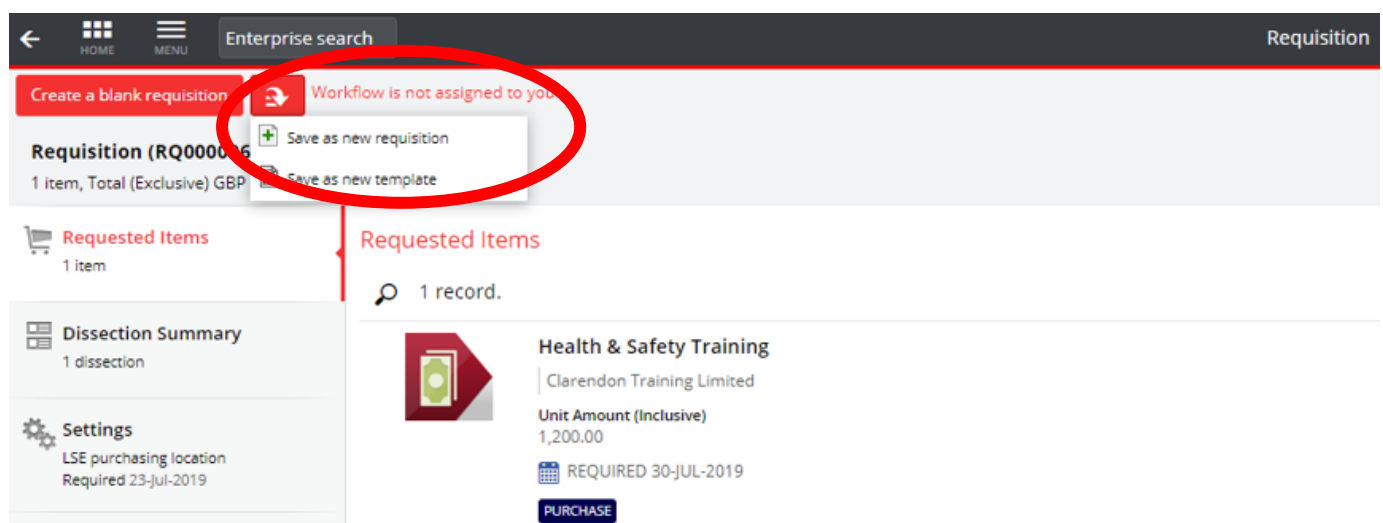
## Creating an Order Template

If you are raising the same or a similar order regularly, it would be easier to raise the order once and then create a template. Once a template has been created, you can use it again and it will have saved all the items you had previously keyed in. You can then delete, duplicate or edit the lines if you want to.

1. Once you've raised a requisition and submitted it for approval, click on the Action button



and select **Save as a new template**.



2. The system will then prompt you to name the template. Once you have inputted a relevant name, select OK.

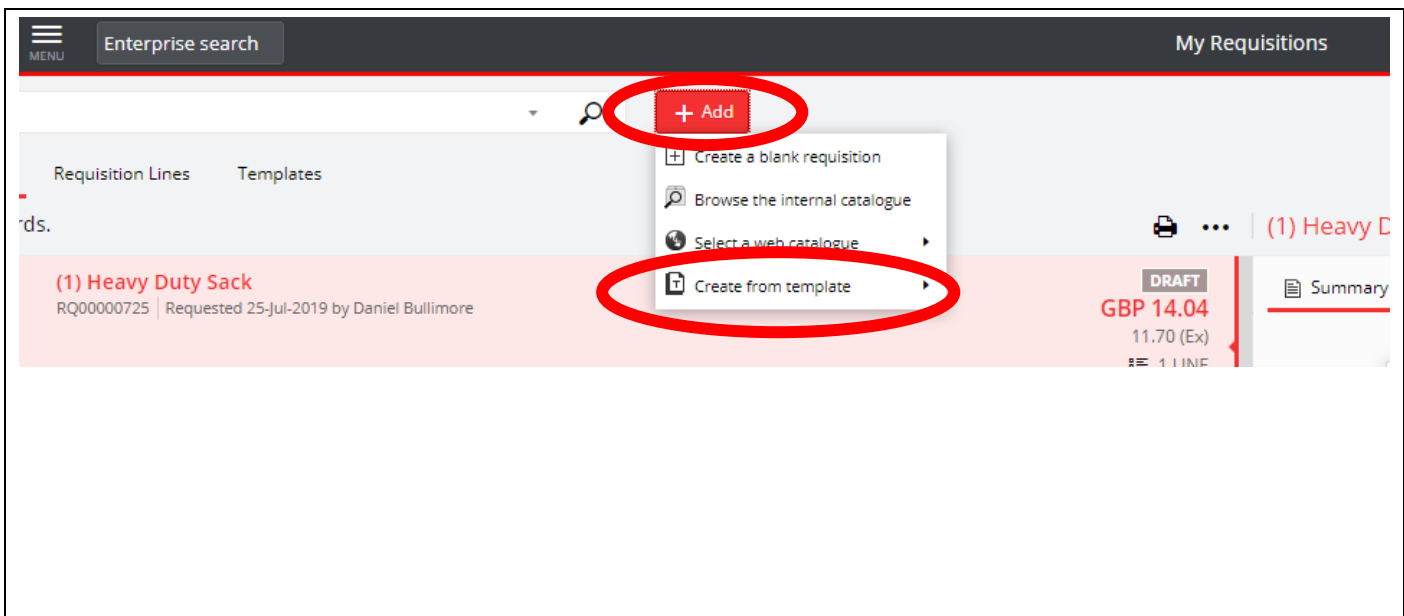
Template Name ×

Template Name \*  33

OK Cancel

3. The next time you go to raise a requisition from the **My Requisitions** tile, a fourth option will appear when you select **Add** called **Create from template**.





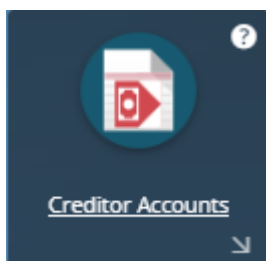
## Searching for a Supplier


You can check to see if a supplier is on the system before having to raise a requisition.

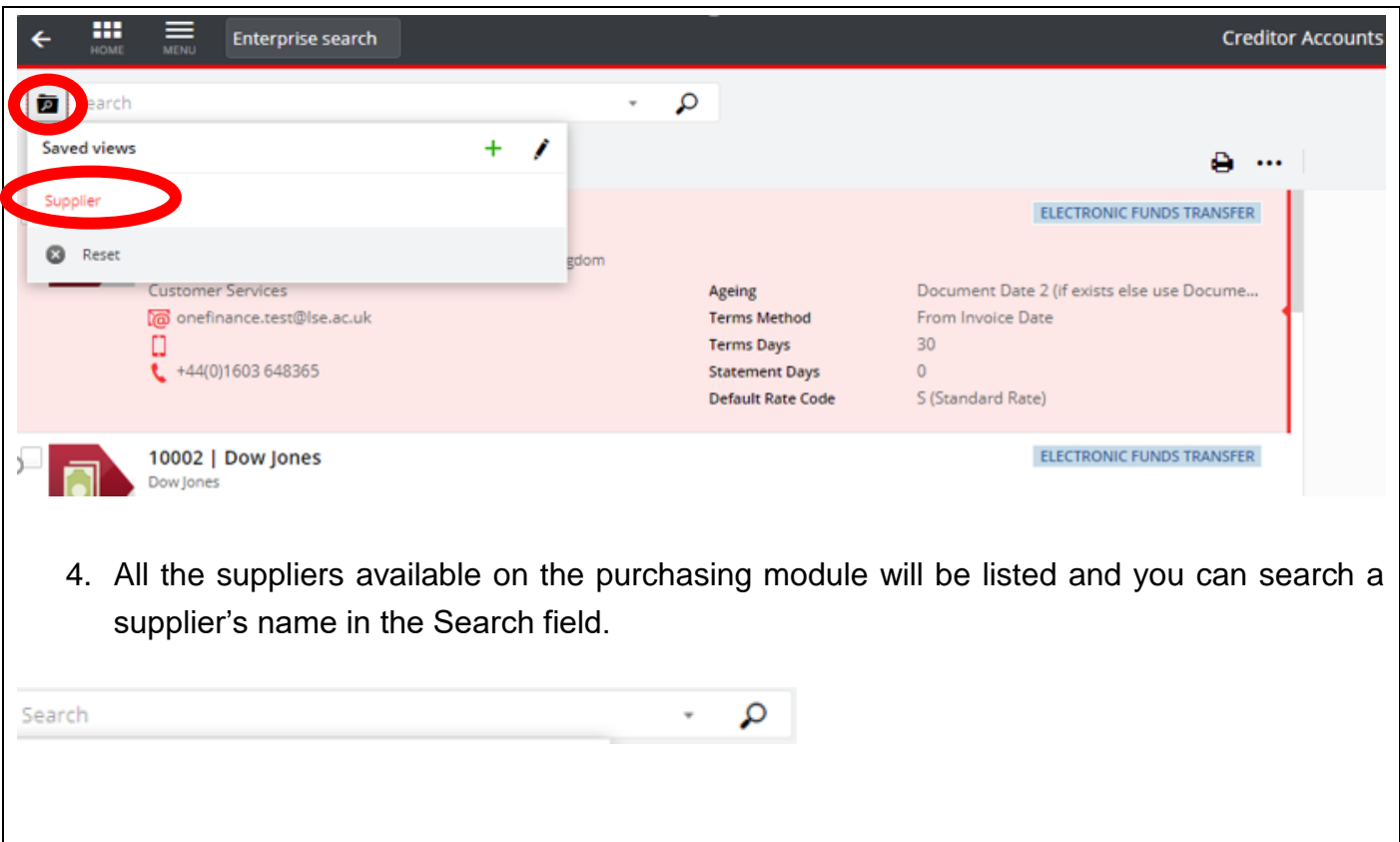
1. Go to the **Accounts Payable** tab on the navigation bar at the bottom of the screen.



2. Select the **Creditor Accounts** tile



3. Click the magnifying glass  located on the left of the search field and then select **Supplier**.



4. All the suppliers available on the purchasing module will be listed and you can search a supplier's name in the Search field.

## Goods Receipting

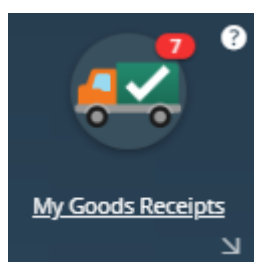
### Bulk Receipting

You can receipt multiple purchase orders in one go rather than one-by-one.

1. Go to the **My** tab on the navigation bar at the bottom of the screen.



2. Click on the **My Goods Receipt** tile



### 3. Select **Add** followed by **Receive order lines**

Search

Receipts Receipt Lines Shipping Notices

7 records.

**(2) Compactor Sack, Ultra Cotton Long Sleeve T-Shirt ladies**  
GR00000137 | Received on 28-Jul-2019 | Created 28-Jul-2019 by Daniel Bullimore  
DRAFT  
GBP 32.66  
27.22 (Ex)  
2 LINES

**(1) Clear Sack 2**  
GR00000130 | Received on 23-Jul-2019 | Created 23-Jul-2019 by Daniel Bullimore  
DRAFT  
GBP 108.00  
90.00 (Ex)  
1 LINE

**(3) Core Level 2 Introduction, Fruit Box - The Fresh 10, 568ml (Pint) Semi Skimmed Milk. AMENDS**  
GR00000123 | Received on 19-Jul-2019 | Created 19-Jul-2019 by Daniel Bullimore  
DRAFT  
GBP 671.69  
559.74 (Ex)  
3 LINES

### 4. The **Review Goods** screen will open up

### 5. You can select the tick box next to the purchase orders that you want to bulk receipt.

Search

Filter Clear all 3 SELECTED Add Add and continue 64 records.

☐ Event Example For Dora 1 ☐ Select all

**RECEIPT STATUS** Clear ☒ Not Started 64

**DUE**

☐ Today 0

☐ Tomorrow 1

☐ Yesterday 1

☐ This Week 1

☐ Next Week 0

More

**DELIVERY POINT**

☐ DTS St. Clements Building 4

☐ Finance Division 2

☐ Health Policy 1

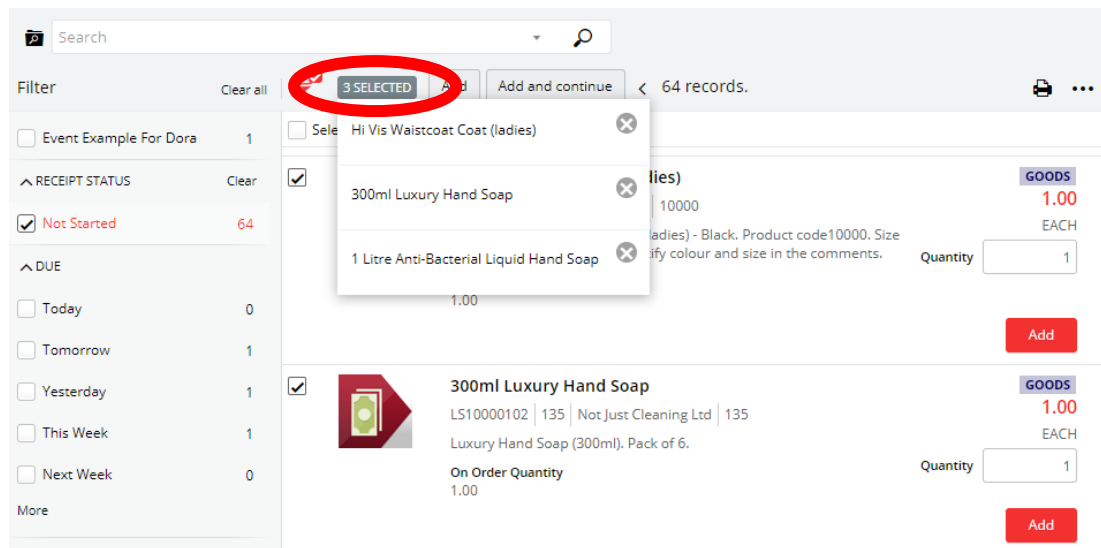
☐ IGC 1

**Hi Vis Waistcoat Coat (ladies)**  
LS10000103 | 10000 | Arco Ltd | 10000  
W05-BK Hi Vis Waistcoat Coat (ladies) - Black, Product code 10000. Size available in S-4XL. \*Please specify colour and size in the comments.  
On Order Quantity 1.00  
Quantity 1  
Add

**300ml Luxury Hand Soap**  
LS10000102 | 135 | Not Just Cleaning Ltd | 135  
Luxury Hand Soap (300ml), Pack of 6.  
On Order Quantity 1.00  
Quantity 1  
Add

**1 Litre Anti-Bacterial Liquid Hand Soap**  
LS10000101 | 127 | Not Just Cleaning Ltd | 127  
Anti-Bacterial Foam Hand Soap (1 litre), Pack of 6.  
On Order Quantity 1.00  
Quantity 1  
Add

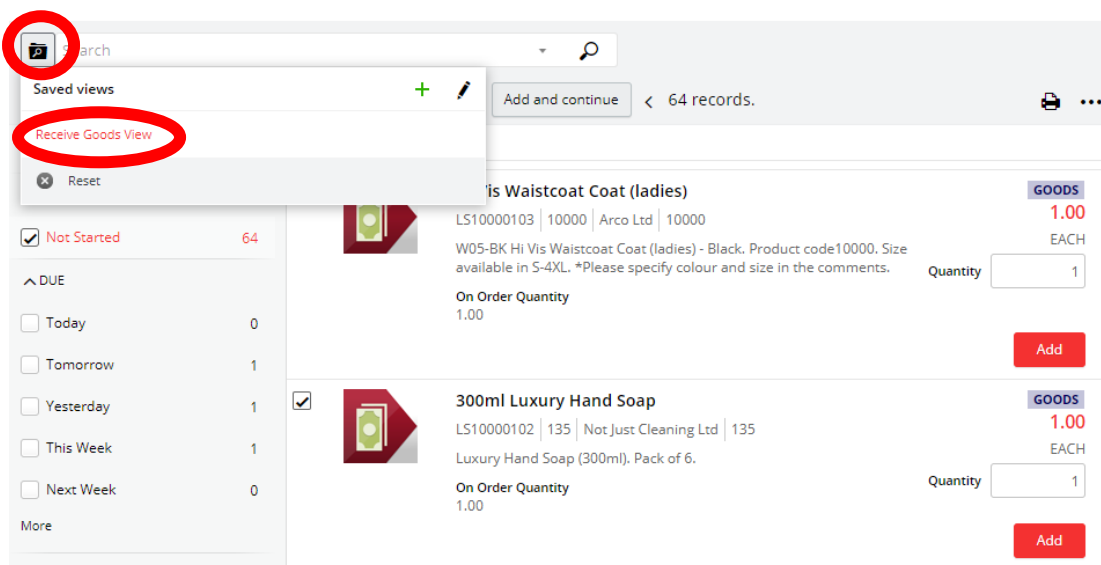
- If you click the **Selected** button, you can view the purchase orders you want to bulk receipt and can remove purchase orders by selecting



6. You can also change the view from Card View to Grid View by clicking the magnifying glass






followed by **Receive Goods View**



7. If you change view, please repeat step 5.

Filter		Clear all	6 SELECTED	Add	Add and continue	< 1 - 23 of 64 records.
PURCHASE ORDER			Purchase Order	Requisition	Requisition User	Line Status Due Supplier Name
<input type="checkbox"/> PO00000062	1		LE10000001	RQ00000503	BULLIMOD	In Progress 13-Jul-2019 Stearn Electric Company Limited
<input type="checkbox"/> PO00000061	1		LF10000001	RQ00000479	BULLIMOD	In Progress 09-Jul-2019 Not Just Cleaning Ltd
<input type="checkbox"/> PO00000056	1	<input checked="" type="checkbox"/>	LS10000011	RQ00000271	BULLIMOD	In Progress 03-Jul-2019 Office Depot
<input type="checkbox"/> PO00000043	1	<input checked="" type="checkbox"/>	LS10000017	RQ00000260	BULLIMOD	In Progress 10-Jul-2019 Stearn Electric Company Limited
<input type="checkbox"/> PO00000030	1	<input checked="" type="checkbox"/>	LS10000022	RQ00000252	BULLIMOD	In Progress 29-Jun-2019 Jones Bros

8. Once you have selected all the purchase orders you want to bulk receipt, click **Add and continue** which is located at the top of the page.

Search		Filter	Clear all	3 SELECTED	Add	<b>Add and continue</b>	64 records.
<input type="checkbox"/> Select all <input type="checkbox"/> PO00000062 <input type="checkbox"/> PO00000061 <input type="checkbox"/> PO00000056 <input type="checkbox"/> PO00000043 <input type="checkbox"/> PO00000030 More <input type="checkbox"/> REQUISITION <input type="checkbox"/> RQ00000002 <input type="checkbox"/> RQ00000018 <input type="checkbox"/> RQ00000024 <input type="checkbox"/> RQ00000025 <input type="checkbox"/> RQ00000027 More <input type="checkbox"/> ORDER TYPE <input type="checkbox"/> Standard Order		<input checked="" type="checkbox"/>  <b>Hi Vis Waistcoat Coat (ladies)</b> LS10000103   10000   Arco Ltd   10000 W05-BK Hi Vis Waistcoat Coat (ladies) - Black. Product code 10000. Size available in S-4XL. *Please specify colour and size in the comments. On Order Quantity 1.00 Quantity <input type="text" value="1"/> Add	<input checked="" type="checkbox"/>  <b>300ml Luxury Hand Soap</b> LS10000102   135   Not Just Cleaning Ltd   135 Luxury Hand Soap (300ml), Pack of 6. On Order Quantity 1.00 Quantity <input type="text" value="1"/> Add	<input checked="" type="checkbox"/>  <b>1 Litre Anti-Bacterial Liquid Hand Soap</b> LS10000101   127   Not Just Cleaning Ltd   127 Anti-Bacterial Foam Hand Soap (1 litre), Pack of 6. On Order Quantity 1.00 Quantity <input type="text" value="1"/> Add			

9. The **Goods Receipt** screen will open, and the purchase orders will then be condensed on one goods receipt.

## Received Items

+ Add

3 records.

Print ...



## Hi Vis Waistcoat Coat (ladies)

10000 | Arco Ltd | 10000

Purchase Order  
LS10000103Receipt Quantity  
1.00

DANIEL BULLIMORE

GOODS

GBP 4,800.00

4,000.00 (Ex)

EACH

1 DISSECTION

Edit



## 300ml Luxury Hand Soap

135 | Not Just Cleaning Ltd | 135

Purchase Order  
LS10000102Receipt Quantity  
1.00

DANIEL BULLIMORE

GOODS

GBP 7.31

6.09 (Ex)

EACH

1 DISSECTION

Edit



## 1 Litre Anti-Bacterial Liquid Hand Soap

127 | Not Just Cleaning Ltd | 127

Purchase Order  
LS10000101Receipt Quantity  
1.00

DANIEL BULLIMORE

GOODS

GBP 65.87

54.89 (Ex)

EACH

1 DISSECTION

Edit



- You will also be able to see a clear view of the details of the requisition you select on the right side of the page, like the example shown.

## GOODS RECEIPT

UNAPPROVED

## Goods Receipt

GR00000139

Reference      Received on 29-Jul-2019

Issued              29-Jul-2019

Receipt Total      GBP 4,060.98

Receipt User      Daniel Bullimore

Description	Quantity	Unit	Unit Price (Exclusive)	Line Amount (Exclusive)
1 Litre Anti-Bacterial Liquid Hand Soap LS10000101 - 127 - Not Just Cleaning Ltd	1.00	each	54.89	GBP 54.89
300ml Luxury Hand Soap LS10000102 - 135 - Not Just Cleaning Ltd	1.00	each	6.09	GBP 6.09
Hi Vis Waistcoat Coat (ladies) LS10000103 - 10000 - Arco Ltd	1.00	each	4,000.00	GBP 4,000.00
Total				4,060.98

10. Click **Approve** in the top left corner to receipt the purchase orders.

**Approve**

**Goods Receipt (GR00000139)** 3 items, Total (Exclusive) GBP 4,060.98

**Receipted Items** 3 items

**Dissection Summary** 2 dissections

**Settings** LSE purchasing location

**Authorisation History** 2 items

**Transmission History**

**Attachments** 0 Attachments

**Receipted Items** 3 records.

**Hi Vis Waistcoat Coat (ladies)**  
10000 | Arco Ltd | 10000  
Purchase Order: LS10000103 | Receipt Quantity: 1.00  
DANIEL BULLIMORE

**300ml Luxury Hand Soap**  
135 | Not Just Cleaning Ltd | 135  
Purchase Order: LS10000102 | Receipt Quantity: 1.00  
DANIEL BULLIMORE

## Reporting

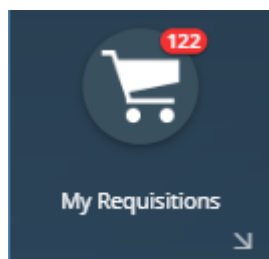
### Viewing Your Requisitions

You can view the requisitions you have previously raised to see where they are in the approval process.

1. Go to the **My** tab on the navigation bar at the bottom of the screen.



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



- A screen will open with the requisitions you have previously raised on the left side.

Enterprise search My Reqs

Search + Add

Requisitions Requisition Lines Templates

122 records.

(1) Heavy Duty Sack  
RQ00000725 | Requested 25-Jul-2019 by Daniel Bullimore  
DRAFT  
GBP 14.04  
11.70 (Ex)  
1 LINE

(1) Ultra Cotton Long Sleeve T-Shirt ladies  
RQ00000723 | Requested 25-Jul-2019 by Daniel Bullimore  
SUBMITTED  
GBP 9.78  
8.15 (Ex)  
1 LINE

(1) Ultra Cotton Long Sleeve T-Shirt ladies  
RQ00000722 | Requested 25-Jul-2019 by Daniel Bullimore  
SUBMITTED  
GBP 9.78  
8.15 (Ex)  
1 LINE

- You will also be able to see a clear view of the details of the requisition you select on the right side of the page, like the example shown.

## REQUISITION

UNAPPROVED


Requisition	RQ00000725
Reference	
Issued	25-Jul-2019
Required	01-Aug-2019
Requisition User	Daniel Bullimore
Requisition Total	GBP 14.04

Description	Quantity	Unit	Unit Price (Exclusive)	Line Amount (Exclusive)
Heavy Duty Sack	1.00	each	11.70	GBP 11.70
Not Just Cleaning Ltd - 100				
Total				11.70

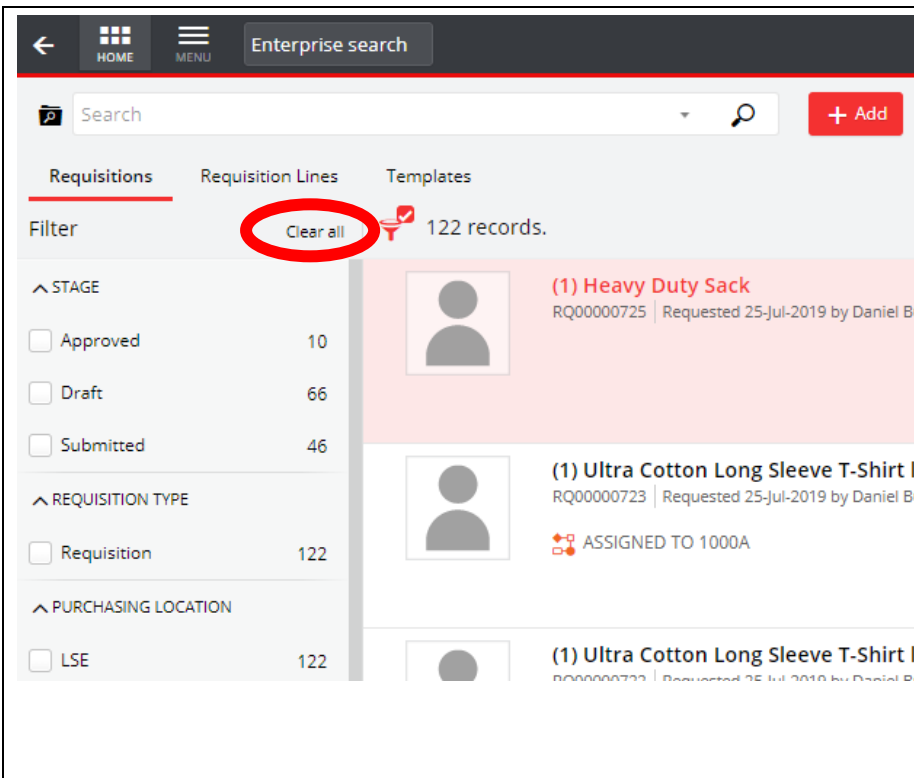
### Costing Summary

Ledger	Account	Exclusive	Inclusive
GL	10.0.0000.1014.36213	11.70	GBP 14.04
19GLACT	LSE, Default, Narrative Scien. Office Consumab		
Total			14.04

The system is already defaulted to filter out any completed/approved requisitions as they will be shown in the **My Purchase Orders** tile. However, if you wanted to view **all** your requisitions you would:

- Select the filter button  on the top left of your screen and then select **Clear all**





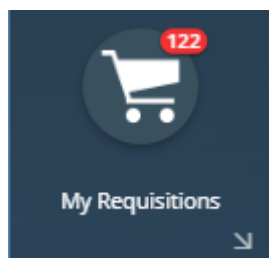
## Grid View - Requisitions

The Operational Procurement Team have created a system-wide grid view with data that we believe are to be the most important when it comes to reporting. The following steps shows you how to access that view and how to create your own view.

1. Go to the **My** tab on the navigation bar at the bottom of the screen.



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



- A screen will open with the requisitions you have previously raised on the left side. This type of view is called a **Card View** and is the default view for the system.

Enterprise search

HOME MENU

Search

+ Add


Requisitions Requisition Lines Templates

122 records.

(1) Heavy Duty Sack  
RQ00000725 | Requested 25-Jul-2019 by Daniel Bullimore  
DRAFT  
GBP 14.04  
11.70 (Ex)  
1 LINE

(1) Ultra Cotton Long Sleeve T-Shirt ladies  
RQ00000723 | Requested 25-Jul-2019 by Daniel Bullimore  
ASSIGNED TO 1000A  
SUBMITTED  
GBP 9.78  
8.15 (Ex)  
1 LINE

(1) Ultra Cotton Long Sleeve T-Shirt ladies  
RQ00000722 | Requested 25-Jul-2019 by Daniel Bullimore  
ASSIGNED TO 1000A  
SUBMITTED  
GBP 9.78  
8.15 (Ex)  
1 LINE

3. Select the magnifying glass icon  in the top left corner followed by **My Requisition View**

Enterprise search

HOME MENU

Search

+ Add

Saved views

My Requisitions View

Reset

MONITOR

ASSIGNED TO 1000A

SUBMITTED  
GBP 660.00  
550.00 (Ex)  
1 LINE

(1) HP

- The same information that you viewed in **Card View** is now displayed in **Grid View**

Enterprise search

HOME MENU


Search

+ Add

Requisitions Requisition Lines Templates

1 - 22 of 82 records.

Requisition	Requisition User	Stage Description	Resource pools	Number of Lines	Date Created	Create Time	Date Required	Description
RQ00000713	General User	Submitted	IT Pool	1	24-Jul-2019	12:53:57	31-Jul-2019	(1) *HP EliteDisplay E223 21.5-inch Monitor
RQ00000714	General User	Draft		1	24-Jul-2019	13:03:03	31-Jul-2019	(1) Dell Inspiron 15 3585 Laptop
RQ00000715	General User	Draft		1	24-Jul-2019	13:07:13	31-Jul-2019	(1) Lenovo ThinkCentre All-In-One Desktop
RQ00000716	General User	Submitted	Teaching and Learning Centre Le...	1	24-Jul-2019	13:13:05	31-Jul-2019	(1) *Desktop PC - HP Elite 800 G4 SFF - i7

4. If you wish, you can then download this information to excel or PDF by selecting the printer icon  in the top right corner and selecting the format.

LSE Purchasing

Excel PDF

Description	Unit Price	Quantity	Total Price
(1) *HP EliteDisplay E223 21.5-inch Monitor	14		
(1) Dell Inspiron 15 3585 Laptop	5,99		
(1) Lenovo ThinkCentre All-In-One Desktop	71		
(1) *Desktop PC - HP Elite 800 G4 SFF i7	800		

## Amending the Data in Grid View – Requisitions

Following on from steps 1 – 3 in the previous section, you can also amend the data you want to see in **Grid View** (something you can't do in Card View).

1. You can **Group** the data by certain **Column Headings** by dragging the column top the top of the page.

In the below example, I have grouped my data by Resource Pools, which tells me which pool my requisition is with for approval.


Search

+ Add

Requisitions Requisition Lines Templates

1 - 22 of 82 records.

Requisition	Requisition User	Stage Description	Resource pools	Number of Lines	Date Created	Create Time
RQ00000713	General User	Submitted	IT Pool	1	24-Jul-2019	12:53:57
RQ00000714	General User	Draft		1	24-Jul-2019	13:03:03
RQ00000715	General User	Draft		1	24-Jul-2019	13:07:13
RQ00000716	General User	Submitted	Teaching and Learning Centre Le...	1	24-Jul-2019	13:13:05
RQ00000717	General User	Completed		1	24-Jul-2019	13:15:29
RQ00000718	General User	Completed		1	24-Jul-2019	13:19:34
RQ00000719	General User	Submitted	1000A	1	24-Jul-2019	13:22:10

2. Select the 3 dots icon  in the top right corner of the screen and select **Customise Columns**

LSE Purchasing



## Description

(1) \*HP EliteDisplay E223 21.5-inch Monitor

(1) Dell Inspiron 15 3585 Laptop

(1) Lenovo ThinkCentre All-In-One Desktop

(1) \*Desktop PC - HP Elite 800 G4 SFF - i7

8,89

- Grid view
- Thumbnail view
- Card view
- Customise columns
- Show/hide grouping

3. The Customise Columns screen will open, and you can customise your data by selecting the column headings on the right and moving them to the screen on the left by selecting the arrow →

## Customise Columns

Search Add all →

Requisition Time	→
Status - Code	→
Status	→
Template	→
Reference 1	→
Comment	→

## Current Column Headings (Drag to re-order)

Remove all X

Requisition	X
Requisition User	X
Drag to Freeze	
Stage Description	X
Resource pools	X
Number of Lines	X

- You can change the Column's position by dragging up and down or to freeze it, by selecting next to the Column Heading. Once you are happy with your columns, click OK.

OK

Cancel

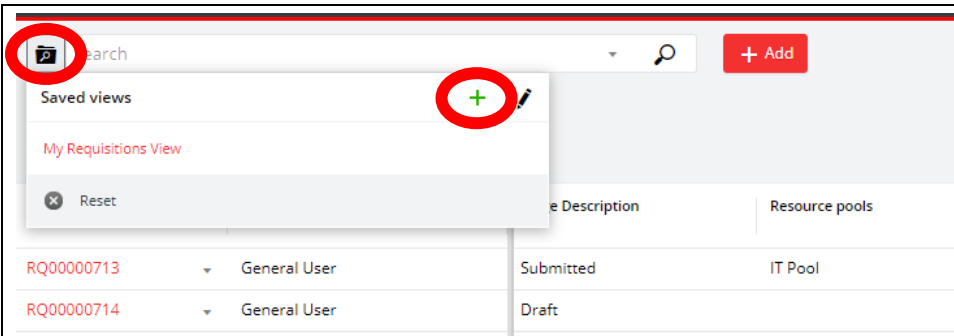
## Current Column Headings (Drag to re-order)

Remove all X

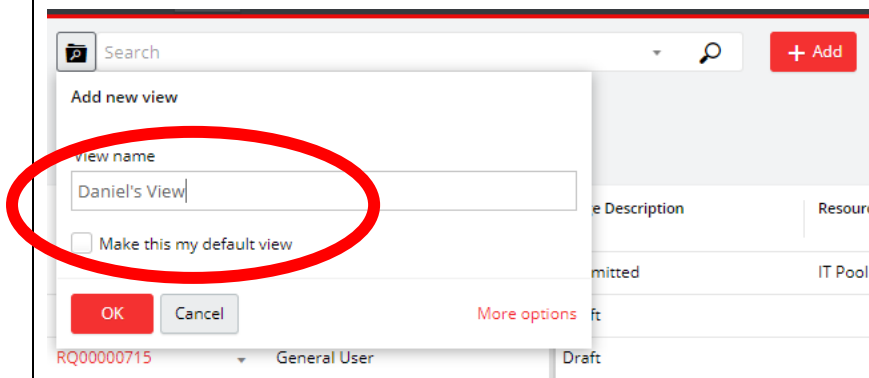
Requisition	X
Requisition User	X
Drag to Freeze	
Stage Description	X
Resource pools	X

- The new columns will then appear in your Grid View.

4. If you wish to save your new view, then select the magnifying glass in the top left corner followed by



5. The system will then prompt you to name your new view and you can tick to make it your default view. Once you've inputted a relevant name, please select OK OK



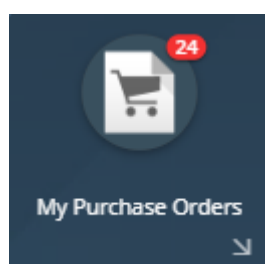
## Grid View – Purchas Orders

The Operational Procurement Team have created a system-wide grid view with data that we believe are to be the most important when it comes to reporting. The following steps shows you how to access that view and how to create your own view.

1. Go to the **My** tab on the navigation bar at the bottom of the screen.



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



- A screen will open with the purchase orders you have previously raised on the left side. This type of view is called a **Card View** and is the default view for the system.

Enterprise search My Purchas

Search

Orders Order Lines

25 records.

**DTP Group**  
PO00000085 | 10071 | Created 25-Jun-2019 by General User  
FULLY INVOICED  
ORDER INVOICE IN PROGRESS  
GBP 1,139.64  
949.70 (Ex)  
1 LINE


**Phoenix Software Ltd v**  
PO00000084 | 10070 | Created 25-Jun-2019 by General User  
FULLY RECEIVED  
RECEIPT IN PROGRESS  
GBP 77.50  
64.58 (Ex)  
1 LINE

**DTP Group**  
PO00000083 | 10071 | Created 25-Jun-2019 by General User  
ON ORDER  
AMENDMENT IN PROGRESS  
GBP 141.59  
117.99 (Ex)  
1 LINE

Receipt Amount (Inclusive) 1,139.64 Invoice Amount (Inclusive) 1,139.64

Receipt Amount (Inclusive) 154.99 Invoice Amount (Inclusive) 0.00

Receipt Amount (Inclusive) 0.00 Invoice Amount (Inclusive) 0.00

- Select the magnifying glass icon  in the top left corner followed by **My Purchase Order View**

Enterprise search

Search

Saved views +

My Purchase Orders View

Reset

25 records.

**DTP Group**  
PO00000085 | 10071 | Created 25-Jun-2019 by General User  
FULLY INVOICED  
ORDER INVOICE IN PROGRESS  
GBP 1,139.64  
949.70 (Ex)  
1 LINE

Receipt Amount (Inclusive) 1,139.64 Invoice Amount (Inclusive) 1,139.64

- The same information that you viewed in **Card View** is now displayed in **Grid View**


Enterprise search My Purchase Orders General User

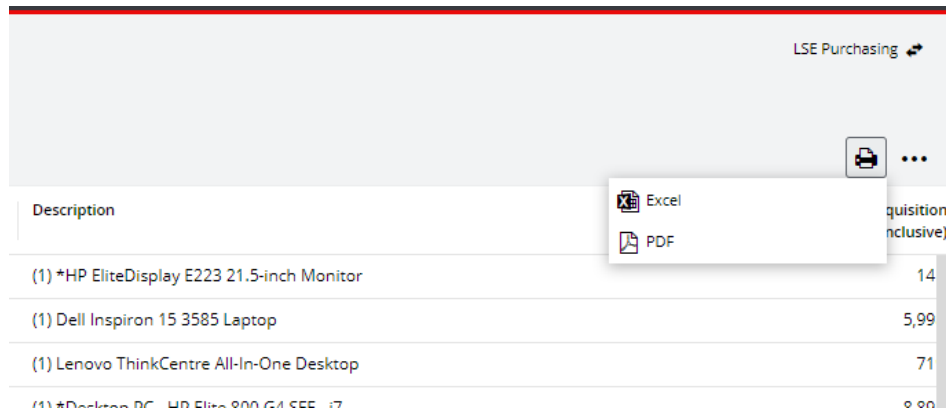
Search

Orders Order Lines

1 - 22 of 26 records.

Order	Order User	Requisition	Order Stage	Order Status	Order Date	Default Date	Order Time	Supplier Name	Description	Number of Lines
LS10000175	General User	RQ00000750	ON ORDER	In Progress	26-Jul-2019	02-Aug-2019	16:39:27	Salesforce.org	(1) testing description	1
LS10000162	General User	RQ00000717	ON ORDER	In Progress	24-Jul-2019	21-Aug-2019	18:57:28	Academia Ltd	(1) Dell 43 Ultra HD 4k Multi Client Monitor	1
LS10000161	General User	RQ00000718	ON ORDER	In Progress	24-Jul-2019	31-Jul-2019	18:57:13	Phoenix Software Ltd v	(1) Dragon Professional Individual v15	1

4. If you wish, you can then download this information to excel or PDF by selecting the printer icon  in the top right corner and selecting the format.



The screenshot shows the 'LSE Purchasing' header. Below it is a table with columns 'Description' and 'Requisition (inclusive)'. A download menu is open, showing 'Excel' and 'PDF' options. The table contains the following data:

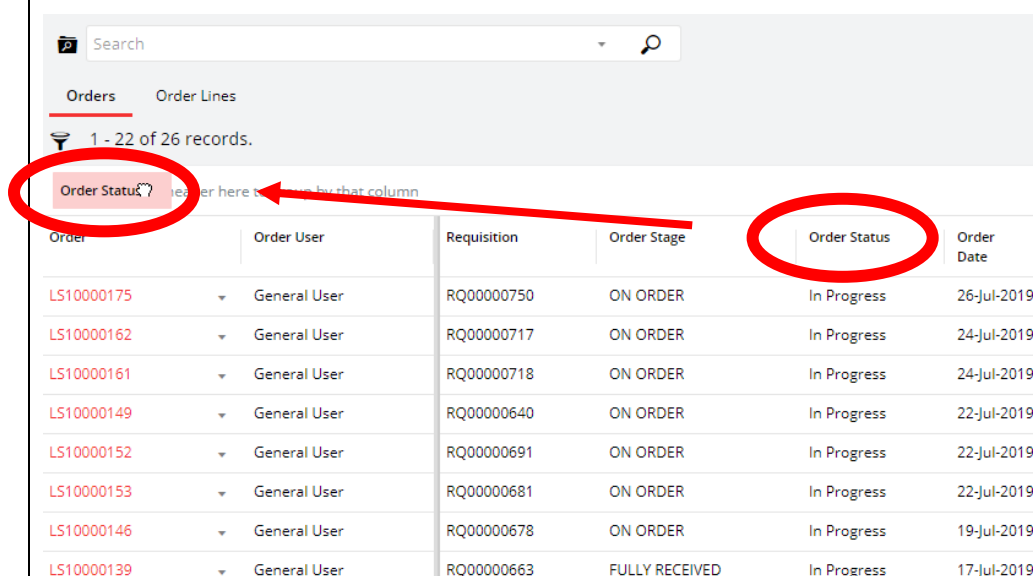
Description	Requisition (inclusive)
(1) *HP EliteDisplay E223 21.5-inch Monitor	14
(1) Dell Inspiron 15 3585 Laptop	5,99
(1) Lenovo ThinkCentre All-In-One Desktop	71
(1) *Desktop PC - HP Elite 800 G4 SFF i7	on

## Amending the Data in Grid View – Purchase Orders

Following on from steps 1 – 3 in the previous section, you can also amend the data you want to see in **Grid View** (something you can't do in Card View).


1. You can **Group** the data by certain **Column Headings** by dragging the column top the top of the page.

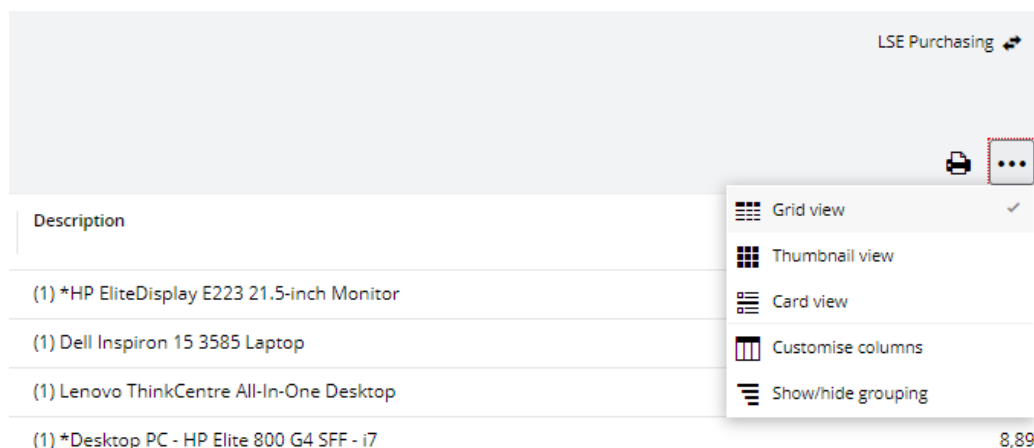
In the below example, I have grouped my data by Order Status, which tells me whether the purchase order is In Progress or Complete.




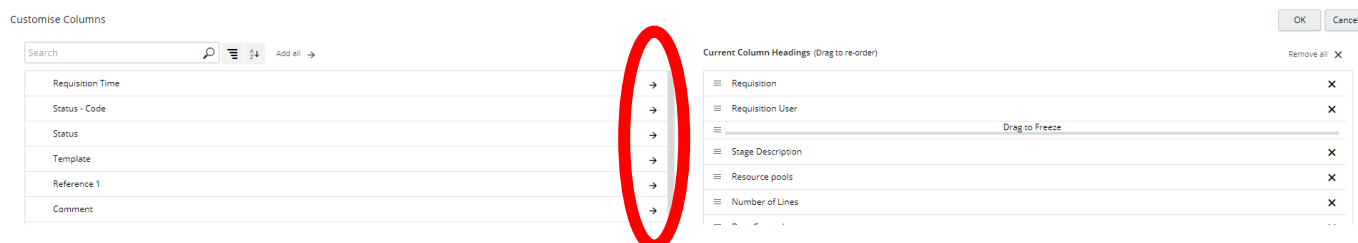
The screenshot shows the 'Orders' tab in the Grid View. A search bar is at the top. Below it, a filter icon and '1 - 22 of 26 records.' are visible. The table has columns: Order, Order User, Requisition, Order Stage, Order Status, and Order Date. The 'Order Status' column is circled in red, and a red arrow points to it from the text 'Order Status?'. The table contains the following data:


Order	Order User	Requisition	Order Stage	Order Status	Order Date
LS10000175	General User	RQ00000750	ON ORDER	In Progress	26-Jul-2019
LS10000162	General User	RQ00000717	ON ORDER	In Progress	24-Jul-2019
LS10000161	General User	RQ00000718	ON ORDER	In Progress	24-Jul-2019
LS10000149	General User	RQ00000640	ON ORDER	In Progress	22-Jul-2019
LS10000152	General User	RQ00000691	ON ORDER	In Progress	22-Jul-2019
LS10000153	General User	RQ00000681	ON ORDER	In Progress	22-Jul-2019
LS10000146	General User	RQ00000678	ON ORDER	In Progress	19-Jul-2019
LS10000139	General User	RQ00000663	FULLY RECEIVED	In Progress	17-Jul-2019

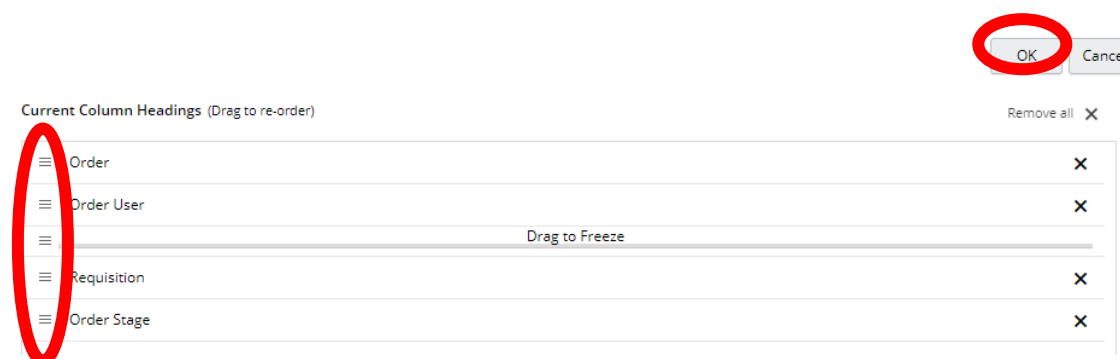
2. Select the 3 dots icon  in the top right corner of the screen and select **Customise Columns**



3. The Customise Columns screen will open, and you can customise your data by selecting the column headings on the right and moving them to the screen on the left by selecting the arrow 





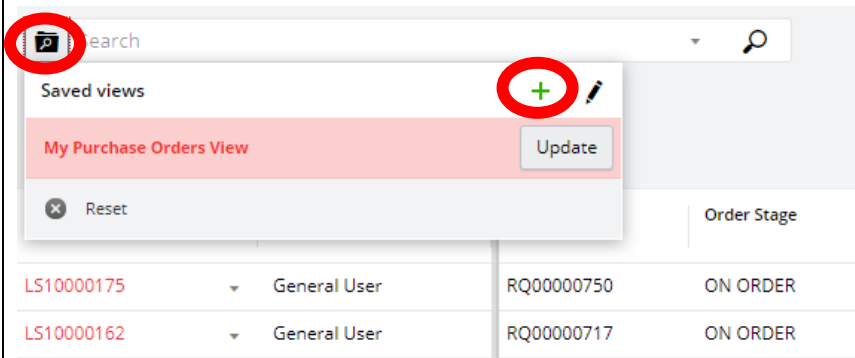
- You can change the Column's position by dragging up and down or to freeze it, by selecting  next to the Column Heading. Once you are happy with your columns, click OK.




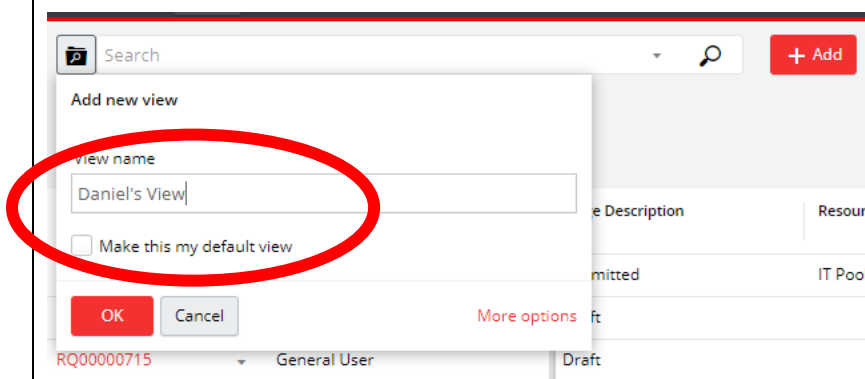
- The new columns will then appear in your Grid View.



- If you wish to save your new view, then select the magnifying glass  in the top left corner followed by  in the top left corner followed by



- The system will then prompt you to name your new view and you can tick to make it your default view. Once you've inputted a relevant name, please select OK 



## Approvals

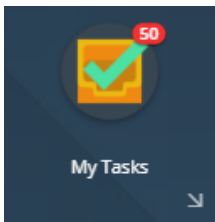
### Bulk Approvals

If you are in an approval pool, you are able to approve multiple tasks at once.

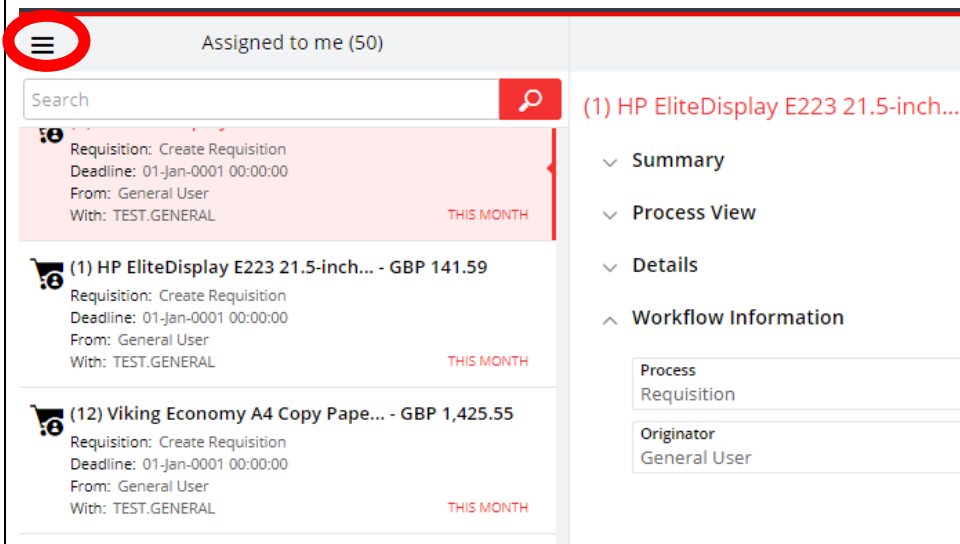
- Go to the **Home** tab on the navigation bar at the bottom of the screen.



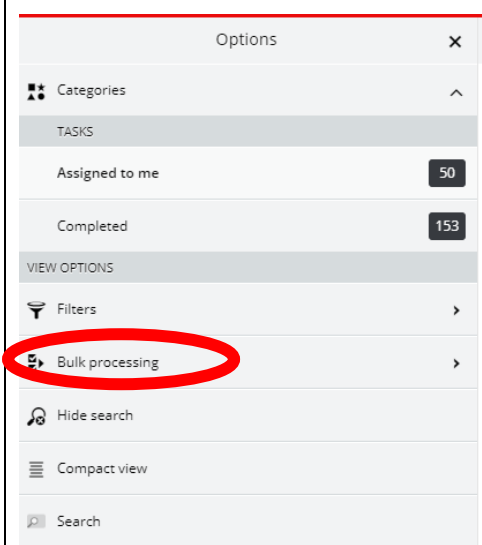
## 2. Click on the **My Tasks** tile



## 3. A screen will open with the tasks that have been assigned to you for actioning. Select the in the top left corner of the screen.



- A dropdown menu will appear. Click on **Bulk Processing**.



4. Another dropdown menu will appear which shows the different groups that your tasks are categorised under. Select a **Group**.

←	Group	Clear
	Budget Approval	87
	Budget Approval	62
	Approval	77
	Create Doc File	9
	Review/Coding	2
	Create Requisition	16

5. A list of tasks related to that Group will appear. You can then select the tick boxes of the requests that you want to approve at once.

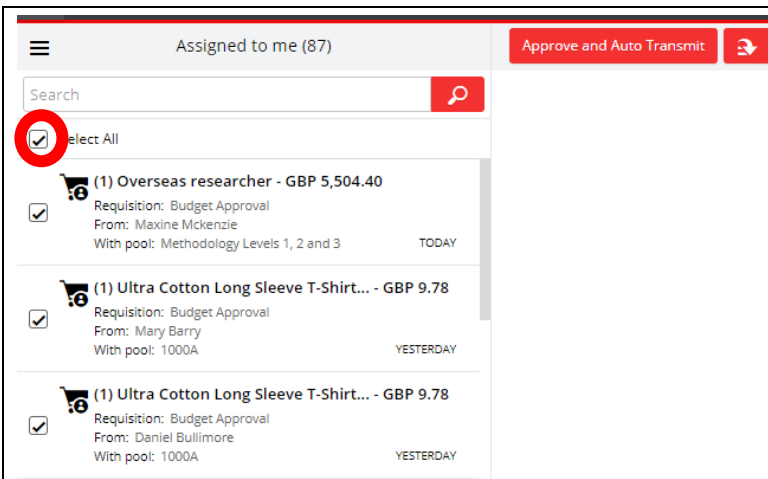
Assigned to me (87) Approve and Auto Transmit

Search

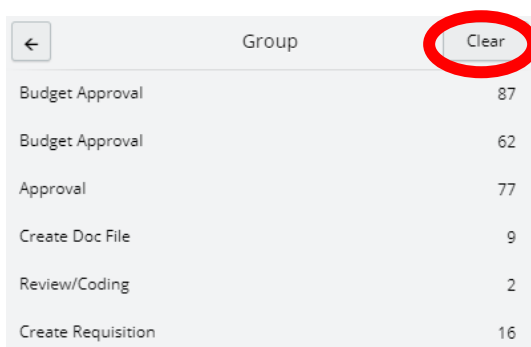
☐ Select All

- ☒ (1) Overseas researcher - GBP 5,504.40  
Requisition: Budget Approval  
From: Maxine McKenzie  
With pool: Methodology Levels 1, 2 and 3  
TODAY
- ☐ (1) Ultra Cotton Long Sleeve T-Shirt... - GBP 9.78  
Requisition: Budget Approval  
From: Mary Barry  
With pool: 1000A  
YESTERDAY
- ☐ (1) Ultra Cotton Long Sleeve T-Shirt... - GBP 9.78  
Requisition: Budget Approval  
From: Daniel Bullimore  
With pool: 1000A  
YESTERDAY
- ☒ (1) Ultra Cotton Long Sleeve T-Shirt... - GBP 9.78  
Requisition: Budget Approval  
From: Daniel Bullimore  
With pool: 1000A  
YESTERDAY
- ☒ (1) \*Desktop PC - HP Elite 800 G... - GBP 8,891.65  
Requisition: Budget Approval  
From: IT Test User  
With pool: Teaching and Learning Centre Level ... WEDNESDAY

6. You can also tick **Select All** to approve all tasks.



7. You can then go back to the normal view of tasks by repeating steps 3 – 4 but then select **Clear**



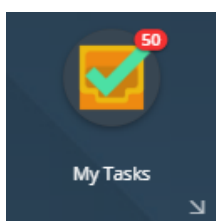
## Filtering Tasks


If you are in an approval pool, you are able to approve multiple tasks at once.

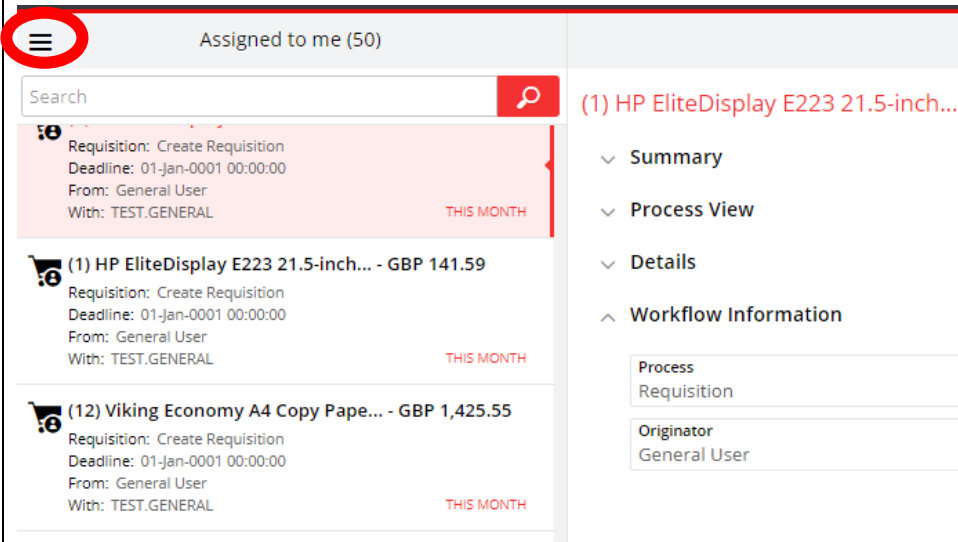
11. Go to the **Home** tab on the navigation bar at the bottom of the screen.



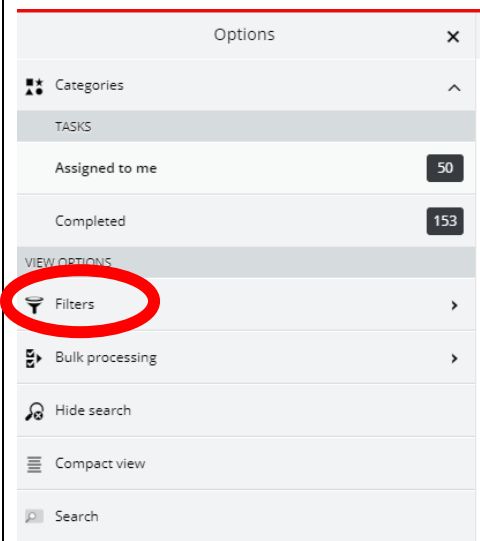
12. Click on the **My Tasks** tile



13. A screen will open with the tasks that have been assigned to you for actioning. Select the  in the top left corner of the screen.



- A dropdown menu will appear. Click on **Filters**.



14. A list of filtering options will appear. You can filter your tasks based on which pool they are assigned to, their status, their priority, and their age.

Select a filter and then click **Apply**.

Filter Clear Apply

^ ASSIGNED TO

<input type="checkbox"/>	4
<input type="checkbox"/> Daniel Bullimore	88
<input type="checkbox"/> IT Pool	24
<input type="checkbox"/> Payroll Pool	6
<input type="checkbox"/> Procurement Pool	21

^ STATUS

Escalated to me	82
Paused	0

^ PRIORITY

<input type="checkbox"/> Medium	143
---------------------------------	-----

^ AGE

Today	1
Yesterday	1
This Week	11
Last Week	16
This Month	93
Last Month	50
Past	143

- The tasks under that filter will appear in the My Tasks screen.

Enterprise search

Assigned to me (1)

Search (1) Research Services - GBP 6,000.00

**(1) Research Services - GBP 6,000.00**  
 Requisition: Payroll Review  
 From: Kerry Hocken  
 With pool: Payroll Pool  
 TODAY

**Summary**

Task Description	Payroll Review
Assigned to	Payroll Pool
Received	26-Jul-2019 07:21:48

15. You can then go back to the normal view of tasks by repeating steps 3 – 4 but then select **Clear**

Filter Clear Apply

^ ASSIGNED TO