



# Procurement

## Advanced Guide

<b>Introduction</b> .....	<b>2</b>
<b>Ordering</b> .....	<b>2</b>
Ad hoc IT Ordering.....	2
Splitting a Requisition Between Two Budget Codes .....	6
Duplicating and Deleting a Requisition Line.....	7
Creating an Order Template .....	8
Searching for a Supplier.....	9
<b>Goods Receipting</b> .....	<b>10</b>
Bulk Receipting.....	10
<b>Reporting</b> .....	<b>15</b>
Viewing Your Requisitions .....	15
Grid View - Requisitions.....	17
Amending the Data in Grid View – Requisitions.....	19
Grid View – Purchas Orders .....	21
Amending the Data in Grid View – Purchase Orders .....	23
<b>Approvals</b> .....	<b>25</b>
Bulk Approvals .....	25
Filtering Tasks.....	28

## 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](#)  
FAO Daniel [Bullimore](#)

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 Ite... ▼

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) 10.0.0000.@@@.34005

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** [X]

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** [X]

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.

	<b>HP 27" Ultra Slim Monitor</b>	<b>GOODS</b>
DTP Group		<b>GBP 238.80</b>
Quantity 1.00	Unit Amount (Inclusive) 238.80	199.00 (Ex)
REQUIRED 19-AUG-2019		ONLY
<b>PURCHASE ASSET</b>		1 DISSECTION
		<b>Edit</b> [X]

## 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 Ite...	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 Ite...	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.

1. 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	Unit Amount (Inclusive) 141.59	GOODS
	1FH45AALSE   DTP Group   1FH45AALSE		GBP 141.59
	Quantity 1.00		117.99 (Ex)
	REQUIRED 21-JUL-2019		EACH
<b>PURCHASE</b> <b>NOT FULLY COSTED</b> <b>ASSET</b>		1 DISSECTION	<b>Edit</b> 
			<b>Create duplicate</b>
			<b>Delete</b>

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

2. 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**.

The screenshot shows the OneFinance requisition interface. At the top, there is a navigation bar with 'HOME', 'MENU', and 'Enterprise search'. Below this, a red banner contains 'Create a blank requisition' and 'Workflow is not assigned to you'. A dropdown menu is open, showing options: 'Save as new requisition' and 'Save as new template'. The 'Save as new template' option is circled in red. Below the menu, the requisition details are visible: 'Requisition (RQ00006)', '1 Item, Total (Exclusive) GBP', 'Requested Items' (1 item), 'Dissection Summary' (1 dissection), and 'Settings' (LSE purchasing location Required 23-Jul-2019). The main content area shows a 'Requested Items' section with '1 record.' and a card for 'Health & Safety Training' by 'Clarendon Training Limited' with a unit amount of 1,200.00 and a required date of 30-JUL-2019. A 'PURCHASE' button is visible at the bottom of the card.

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

The screenshot shows a 'Template Name' dialog box. It has a title bar with 'Template Name' and a close button (X). Below the title bar is an input field with the text 'Test123' and a character count '33'. At the bottom of the dialog, there are two buttons: 'OK' and '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**.

Enterprise search My Requisitions

Requisition Lines Templates

(1) Heavy Duty Sack  
RQ00000725 | Requested 25-Jul-2019 by Daniel Bullimore

DRAFT  
GBP 14.04  
11.70 (Ex)  
1 LINE

Summary

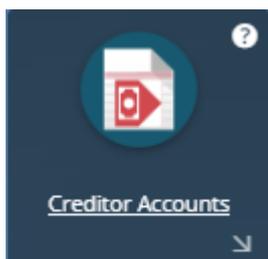
## Searching for a Supplier

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.

**+ Add**

- Create a blank goods receipt
- Receive order lines

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

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

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

Select all

Event Example For Dora 1

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

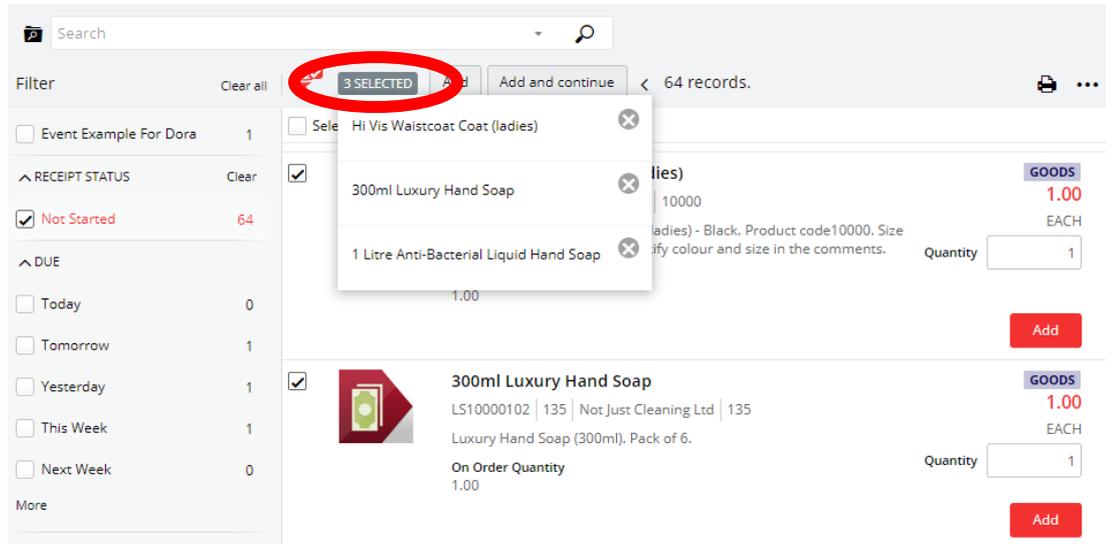
IGC 1

**Hi Vis Waistcoat Coat (ladies)** **GOODS**  
 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.  
 Quantity   
 On Order Quantity 1.00  
**1.00**  
 EACH  
 Add

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

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

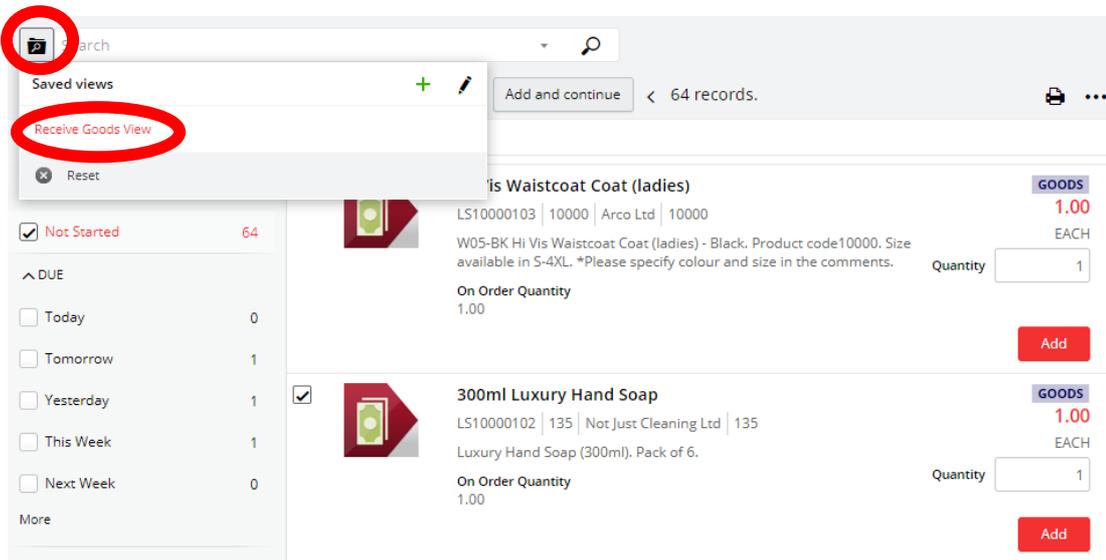
- If you click the **Selected** button, you can view the purchase orders you want to bulk receipt and can remove purchase orders by selecting



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.

Search

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	<input type="checkbox"/> LE10000001	RQ00000503	BULLIMOD	In Progress	13-Jul-2019	Stearn Electric Company Limited
<input type="checkbox"/> PO00000061	1	<input type="checkbox"/> 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 **Add and continue** 64 records.

Select all

<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"/>	<b>GOODS</b> 1.00 EACH	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"/>	<b>GOODS</b> 1.00 EACH	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"/>	<b>GOODS</b> 1.00 EACH	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: LS10000103      Receipt 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: LS10000102      Receipt 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: LS10000101      Receipt 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
<b>Total</b>				<b>4,060.98</b>

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

**Received Items** 3 items

**Dissection Summary** 2 dissections

**Settings** LSE purchasing location

**Authorisation History** 2 items

**Transmission History**

**Attachments** 0 Attachments

**Received Items** 3 records.

Item	Purchase Order	Receipt Quantity
Hi Vis Waistcoat Coat (ladies)	10000   Arco Ltd   10000	1.00
300ml Luxury Hand Soap	135   Not Just Cleaning Ltd   135	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.

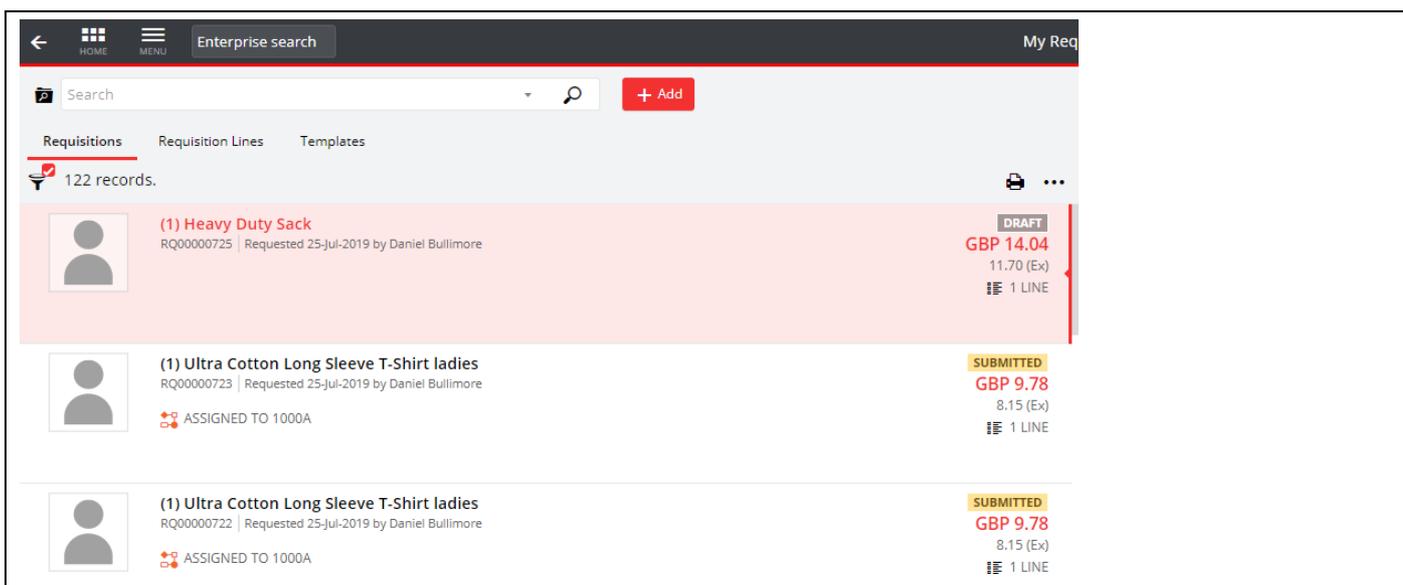
1. Go to the **My** tab on the navigation bar at the bottom of the screen.



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



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



- 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				
<b>Total</b>				<b>11.70</b>

### Costing Summary

Ledger	Account	Exclusive	Inclusive
GL	10.0.0000.1014.36213	11.70	GBP 14.04
19GLACT	LSE. Default. Narrative Scien. Office Consumab		
<b>Total</b>			<b>14.04</b>

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**

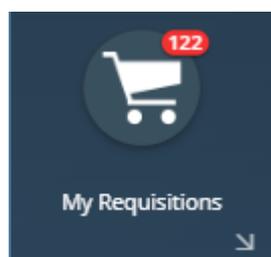
## Grid View - Requisitions

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.

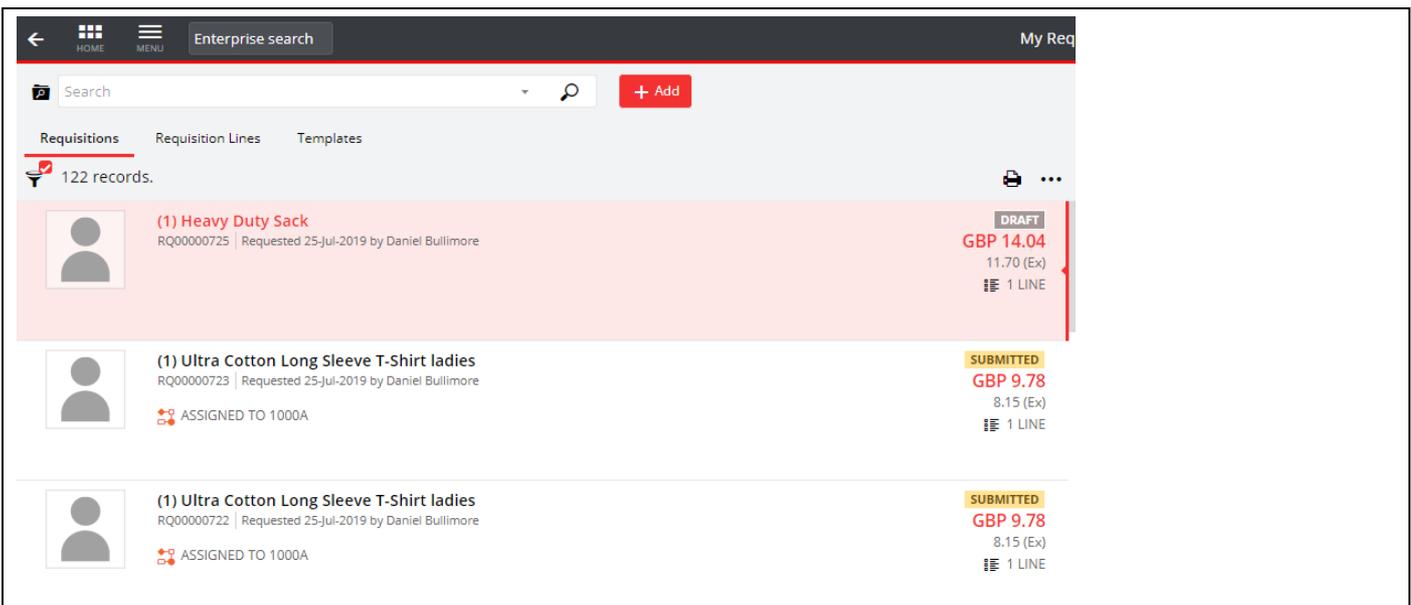
1. Go to the **My** tab on the navigation bar at the bottom of the screen.



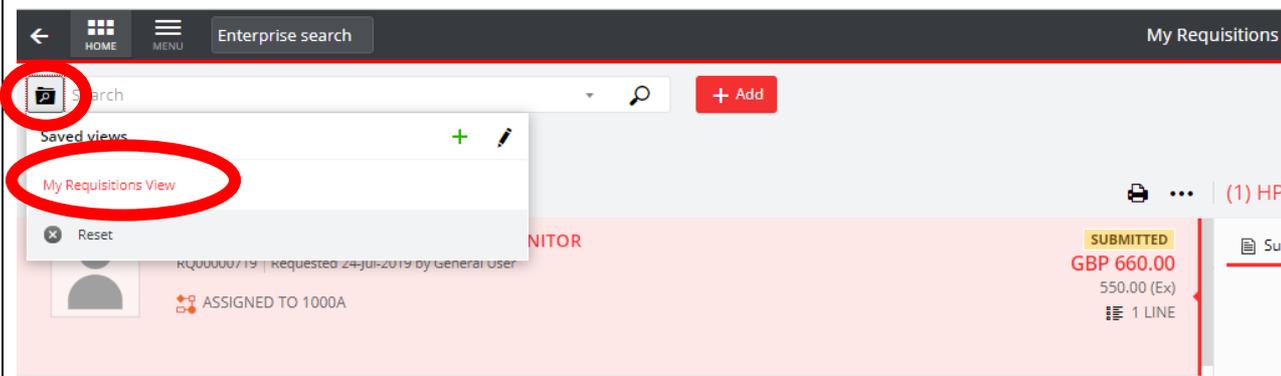
2. Click on the **My Requisitions** tile



- 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.



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



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

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	Quantity	Unit Price	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	8,00		

## 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.

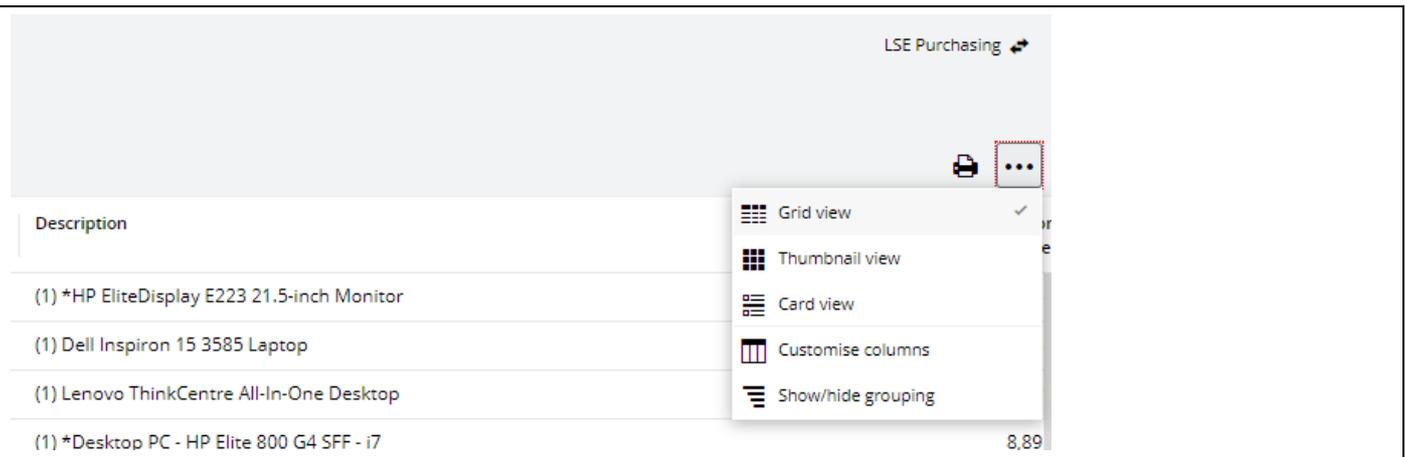
Search + Add

Requisitions Requisition Lines Templates

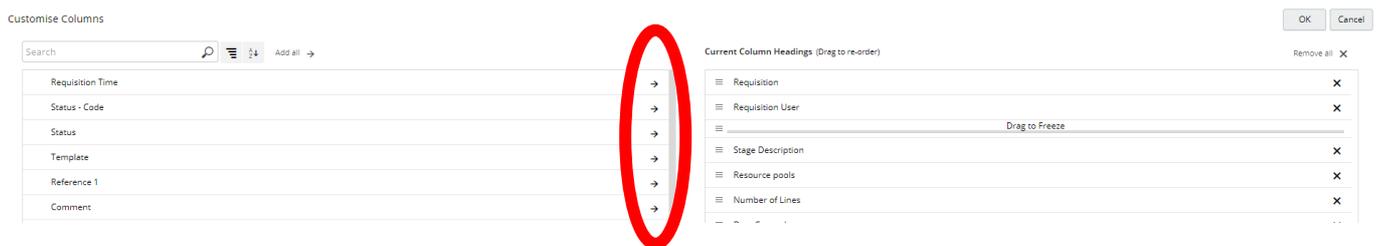
1 - 22 of 82 records.

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

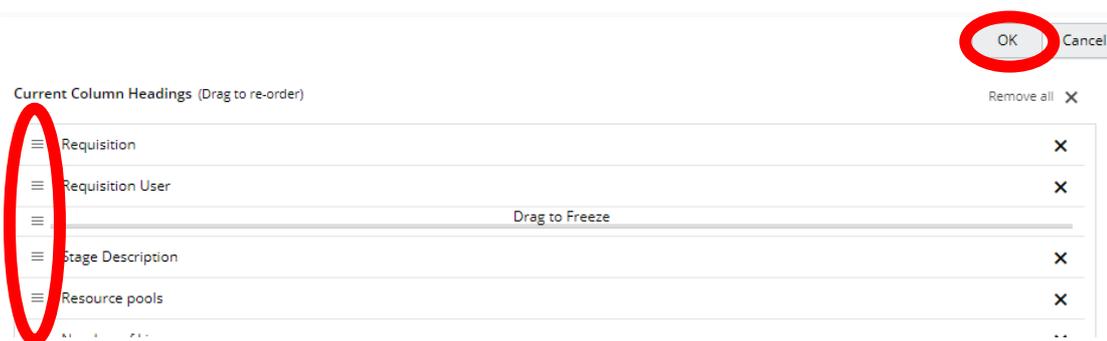
2. Select the 3 dots icon  in the top right corner of the screen and select **Customise Columns**



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 →

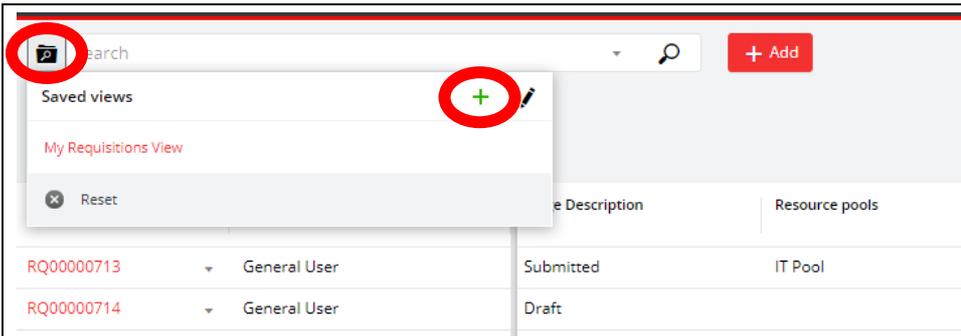


- You can change the Column's position by dragging up and down or to freeze it, by selecting  next to the Column Heading. Once you are happy with your columns, click OK.

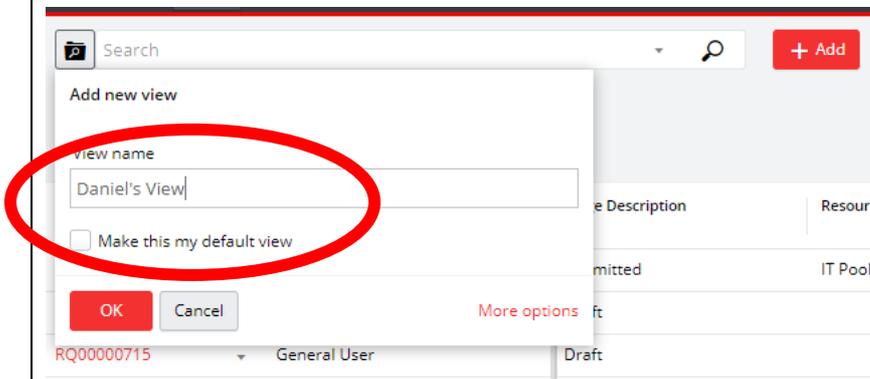


- The new columns will then appear in your Grid View.

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 



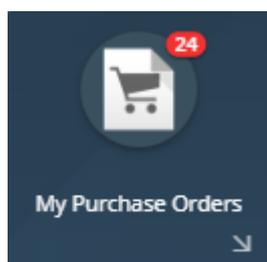
## Grid View – Purchas Orders

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.

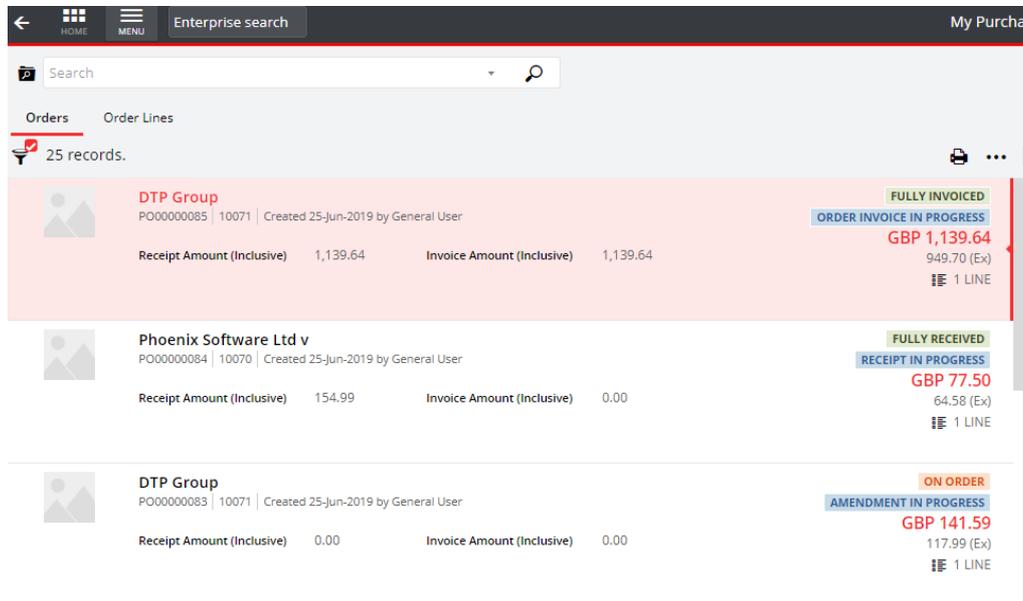
1. Go to the **My** tab on the navigation bar at the bottom of the screen.



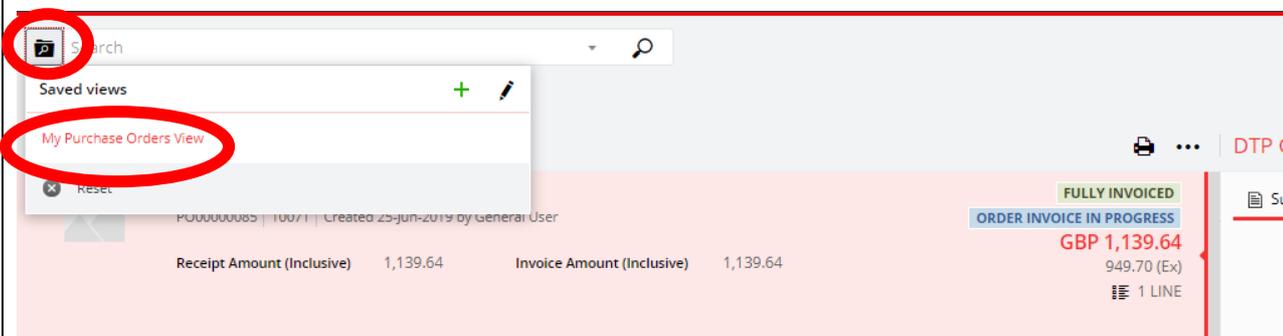
2. Click on the **My Purchase Orders** tile



- 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.



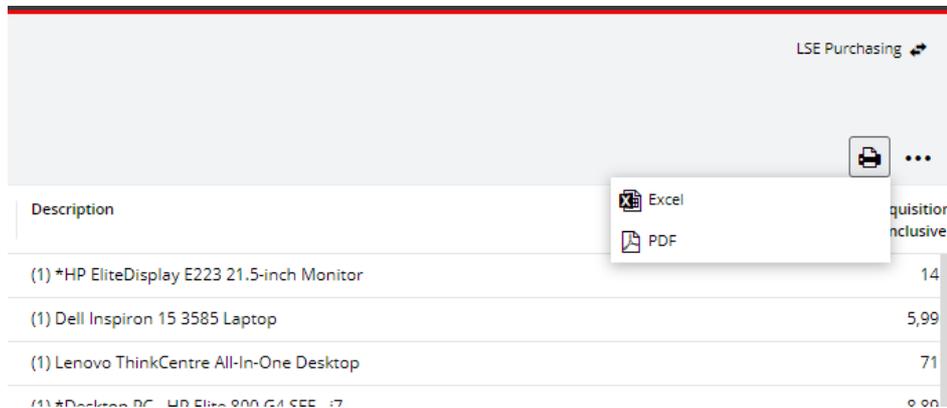
3. Select the magnifying glass icon  in the top left corner followed by **My Purchase Order View**



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

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

- 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.

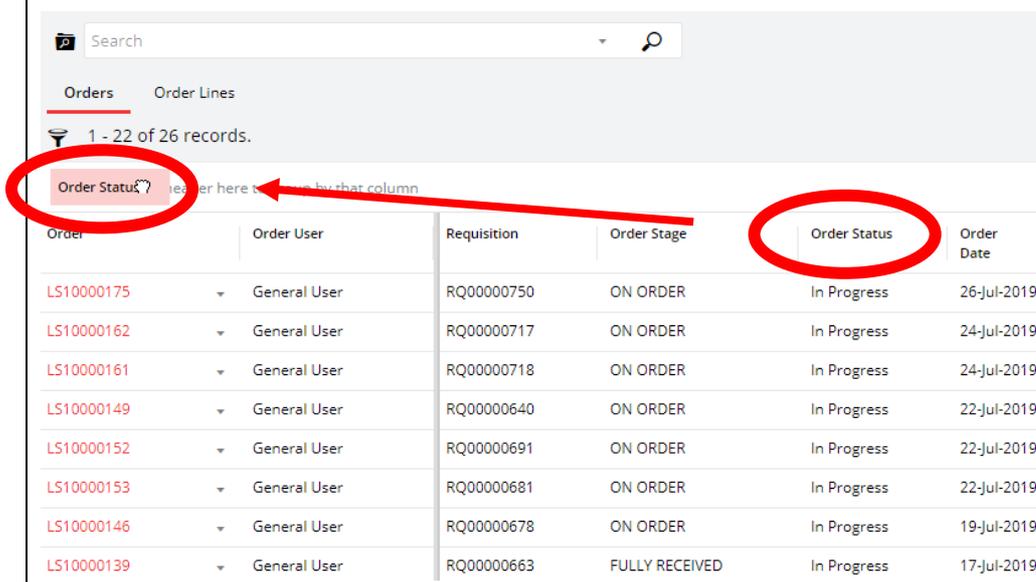


## Amending the Data in Grid View – Purchase Orders

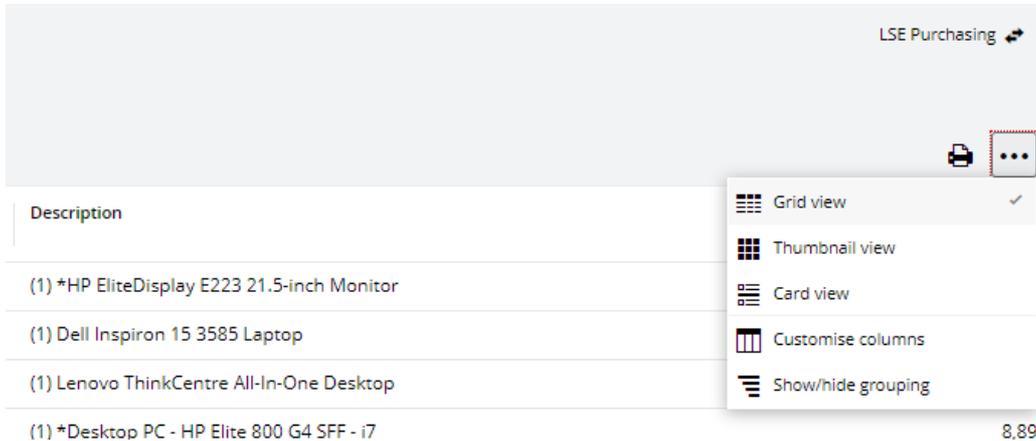
Following on from steps 1 – 3 in the previous section, you can also amend the data you want to see in **Grid View** (something you can't do in Card View).

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

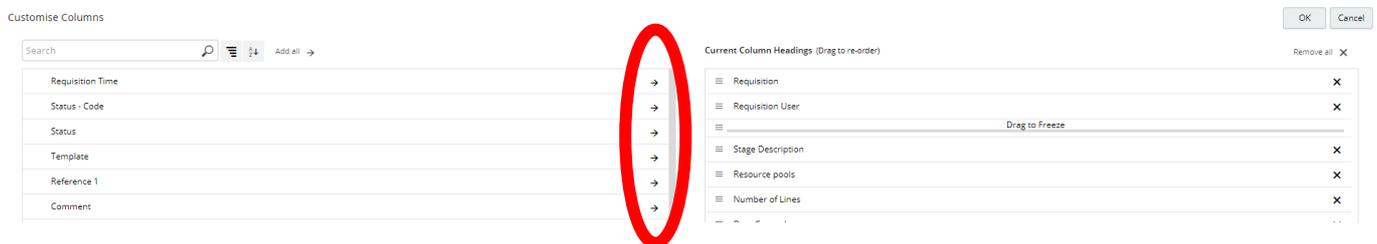
In the below example, I have grouped my data by Order Status, which tells me whether the purchase order is In Progress or Complete.



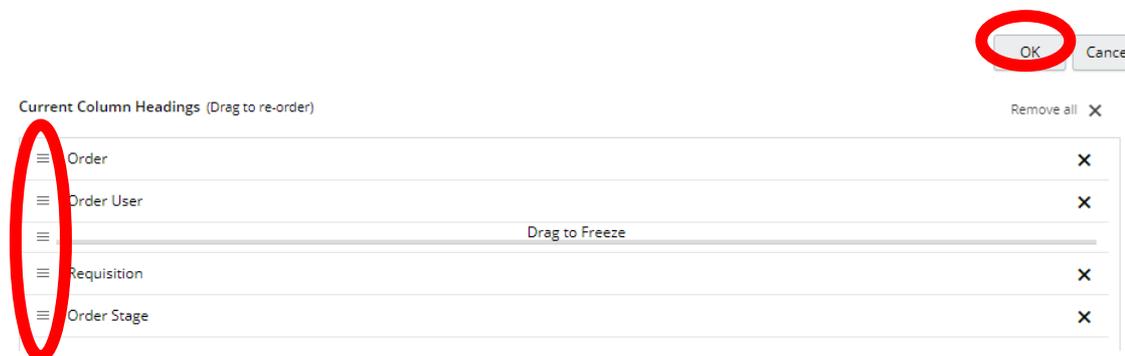
2. Select the 3 dots icon  in the top right corner of the screen and select **Customise Columns**



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 

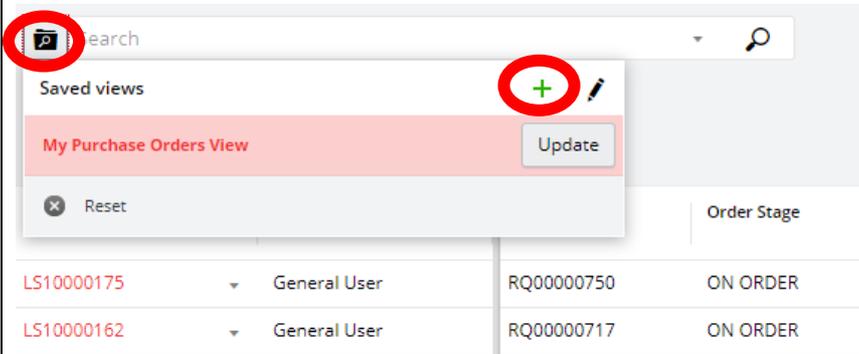


- You can change the Column's position by dragging up and down or to freeze it, by selecting  next to the Column Heading. Once you are happy with your columns, click OK.

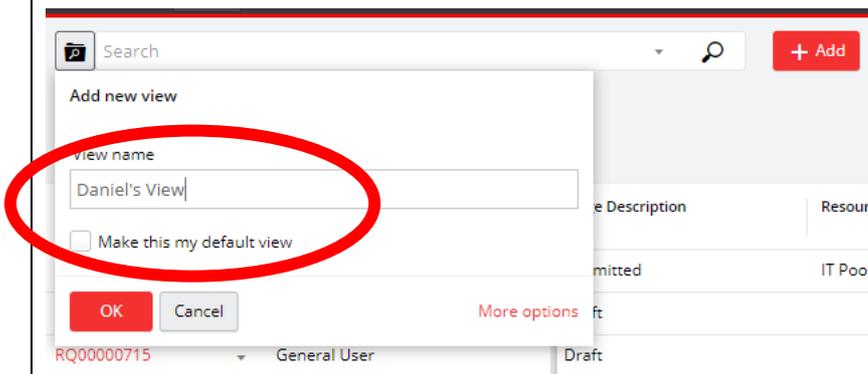


- The new columns will then appear in your Grid View.

- 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

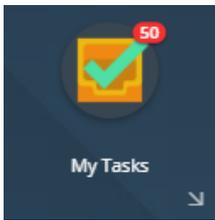
### Bulk Approvals

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 screenshot of a web application interface. At the top, a grey header bar contains a red circle around a menu icon (three horizontal lines) on the left and the text 'Assigned to me (50)' in the center. Below the header is a search bar with a magnifying glass icon on the right. The main content area is divided into two columns. The left column lists three requisition items, each with a shopping cart icon, a title, and details: 'Requisition: Create Requisition', 'Deadline: 01-Jan-0001 00:00:00', 'From: General User', and 'With: TEST.GENERAL'. The right column shows a dropdown menu with options: 'Summary', 'Process View', 'Details', and 'Workflow Information'. Under 'Workflow Information', there are two sections: 'Process' with 'Requisition' and 'Originator' with 'General User'. The text '(1) HP EliteDisplay E223 21.5-inch...' is visible at the top of the right column.

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

A screenshot of a dropdown menu titled 'Options' with a close button (X) in the top right corner. The menu items are: 'Categories' with an expand/collapse arrow, 'TASKS' with a sub-menu arrow, 'Assigned to me' with a badge showing '50', 'Completed' with a badge showing '153', 'VIEW OPTIONS' with a sub-menu arrow, 'Filters' with a sub-menu arrow, 'Bulk processing' with a sub-menu arrow and a red circle around it, 'Hide search' with a sub-menu arrow, 'Compact view' with a sub-menu arrow, and 'Search' with a sub-menu arrow.

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

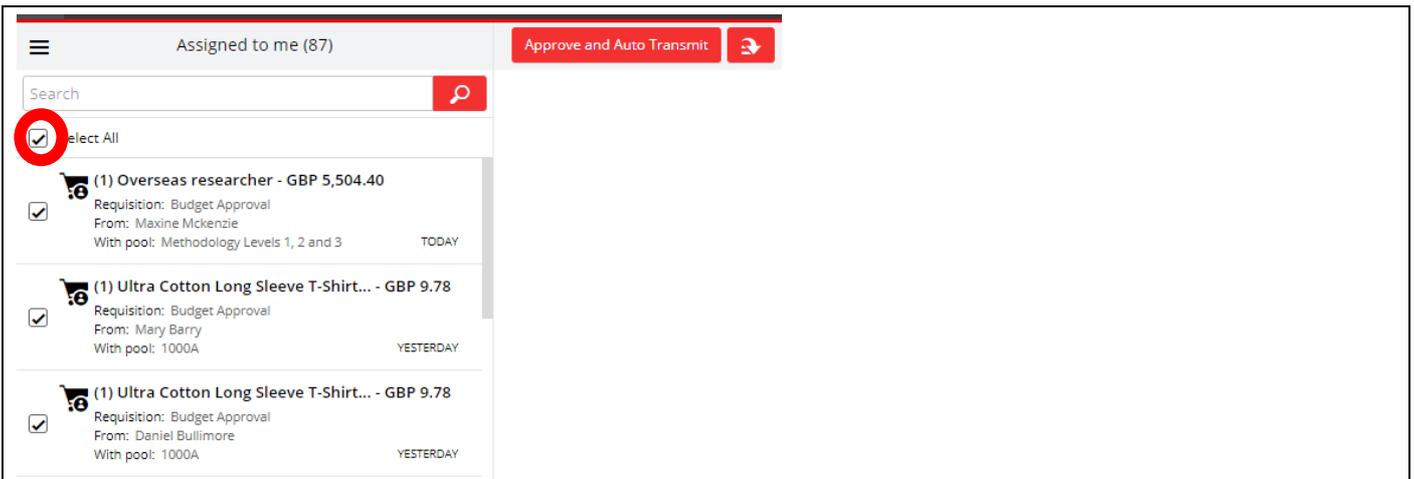
←	Group	Clear
	Budget Approval	87
	Budget Approval	62
	Approval	77
	Create Doc File	9
	Review/Coding	2
	Create Requisition	16

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.

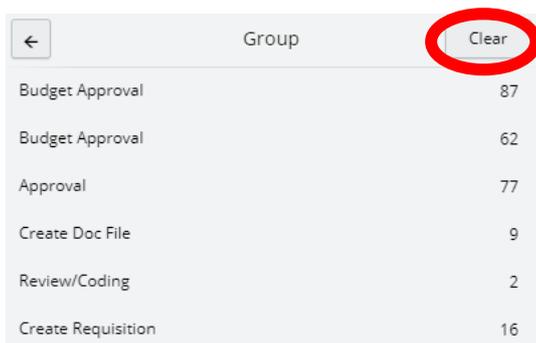
The screenshot shows a task list titled "Assigned to me (87)". At the top right, a red circle highlights the "Approve and Auto Transmit" button. Below the list, a red circle highlights the "Select All" checkbox. The list contains five items, each with a checkbox and a red circle around it:

- (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**



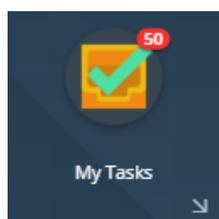
## Filtering Tasks

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

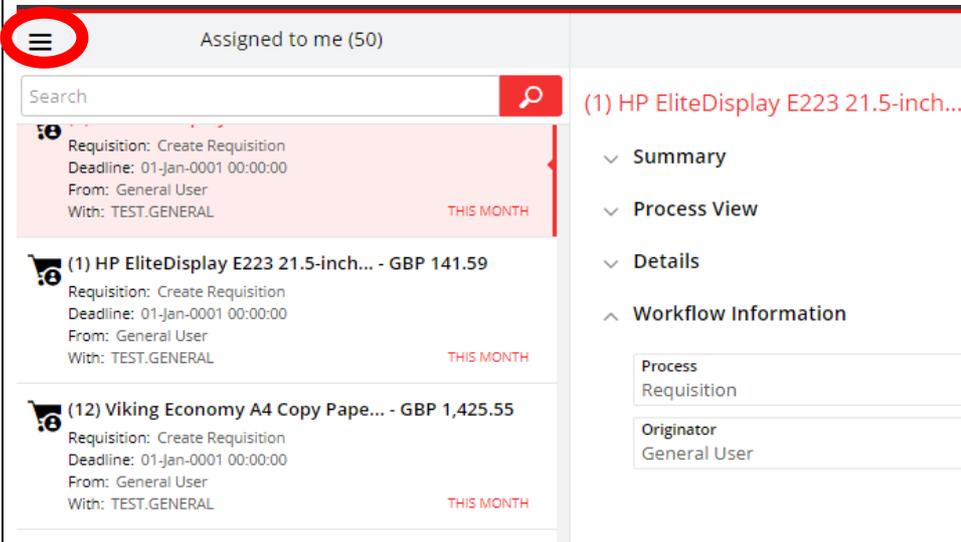
11. Go to the **Home** tab on the navigation bar at the bottom of the screen.



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.



Assigned to me (50)

Search 

(1) HP EliteDisplay E223 21.5-inch...

Requisition: Create Requisition  
Deadline: 01-Jan-0001 00:00:00  
From: General User  
With: TEST.GENERAL THIS MONTH

(1) HP EliteDisplay E223 21.5-inch... - GBP 141.59  
Requisition: Create Requisition  
Deadline: 01-Jan-0001 00:00:00  
From: General User  
With: TEST.GENERAL THIS MONTH

(12) Viking Economy A4 Copy Pape... - GBP 1,425.55  
Requisition: Create Requisition  
Deadline: 01-Jan-0001 00:00:00  
From: General User  
With: TEST.GENERAL THIS MONTH

Summary

Process View

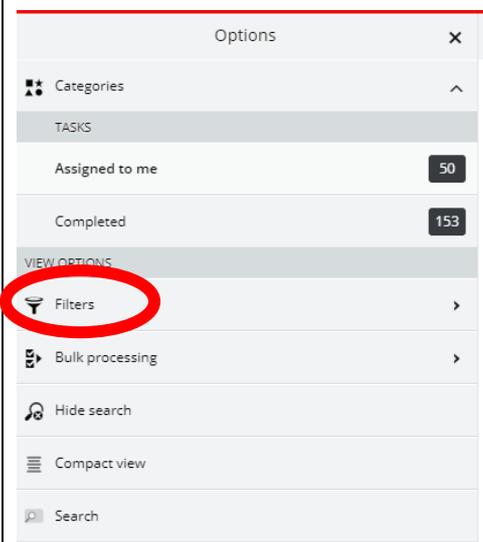
Details

Workflow Information

Process  
Requisition

Originator  
General User

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



Options 

Categories 

TASKS

Assigned to me 50

Completed 153

VIEW OPTIONS

 Filters 

 Bulk processing 

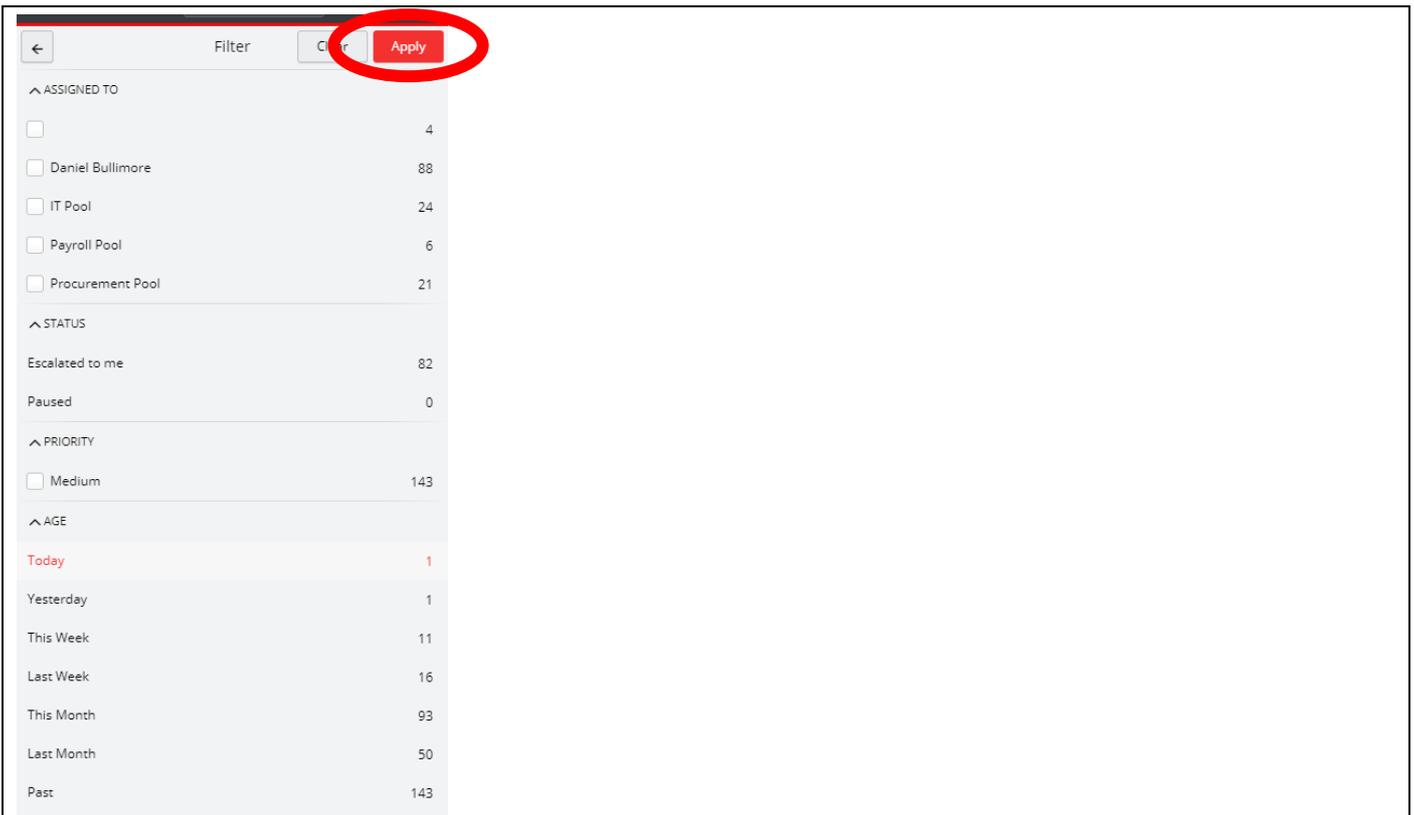
 Hide search

 Compact view

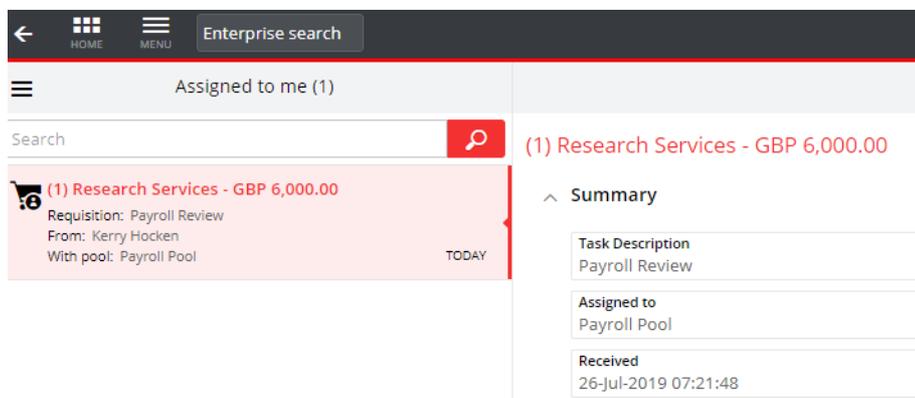
 Search

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**.



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



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

