

# Finance Forms –Travel Purchase orders

Finance Forms can be found via the AskOtago login at

<https://otago.custhelp.com/app/forms/finance>.

This factsheet takes you through submitting a Travel Purchase order request

**NOTE:** you should only complete this form once the OurDrive 'Conference, Study and Professional Attendance Leave' has been approved.

- Supply Chain will not proceed without approval in OurDrive

Choose the form type you require and submit using the "Submit Request" button at the end of the form.

**Your Details:** These sections auto-populate when you login

## Finance forms

Your details

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<b>Department</b>	Supply Chain

Your request

Purchasing Forms	Accounting Forms
<input type="radio"/> Purchase goods	<input type="radio"/> General invoice
<input type="radio"/> Purchase services	<input type="radio"/> Sundry invoice
<input type="radio"/> <b>Travel Purchase Orders</b>	<input type="radio"/> Research invoice
<input type="radio"/> Mobile device	<input type="radio"/> Donation invoice
<input type="radio"/> Quote request	<input type="radio"/> Credit note
<input type="radio"/> Campus Development	

### Your Request:

1. Form type - select "Travel Purchase order"
2. Send purchase order– are you liaising with the Travel Agent directly or do you want the Purchasing Team to on your behalf  
Send purchase order \*  
 Send PO only to me  Send PO to supplier (and a copy to me)

3. Supplier – select either Hello World or Orbit these are the Universities Mandatory Travel Agents (MTA)
4. Account code – add the account code to be charged – this is a mandatory field and changes format depending which account type you choose

Supplier \*

Hello World Brooker  Orbit

**i**  Ensure you arrange travel insurance: [Travel insurance: Book online](#)

If you are travelling to conferences see the [Conference leave policy](#), complete your departments approval process, attach documentation below

Account code \* and dissection **i**

GL

PL

e.g. 10.XX.A01 3241.00

Notes

5. Travel Insurance – see link in info section, Travel insurance is to be completed by the traveller
6. Conference Leave Policy – see link in info section
7. Notes - special notes to the Purchasing Team, this must state here that approval has been given and any reference details for the Purchasing Team to search in OurDrive
8. Authority – choose how this purchase order has been approved. If you select “Approval attached” or Budget holder approval via workflow” a field will appear to select the Budget Holder. Each selection will provide a separate Information box providing details
9. Attach documents – attach any relevant documents here, they can be any format. One of these must be a confirmation of price and dates from the MTA
10. Submit request – click to submit to the Purchasing Team to process the order. You will receive a confirmation it has been submitted

**i** Please indicate whether you have the appropriate authority to make this purchase.

Authority \*

I have authority  Approval attached  Budget holder approval via workflow

**i** Please attach travel quotation or itinerary to provide details of the travel.

Attach documents (required) \*

No file selected.

- Once the Finance One order is completed you will receive an email with the Purchase order attached and confirmation that it has been sent to the MTA if that was what you requested
- The Purchasing Team will complete all internal process for receipting of travel costs, and if required will seek confirmation for amendments.
- Following receipting in Finance One, the Purchasing Team will close this Incident.  
\*Please **do not** close the request yourself it will affect further processes and checks Supply Chain complete after receipting