

Finance Forms – Campus Development

Finance Forms can be found via the AskOtago login at

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

This factsheet takes you through submitting a Purchase Form for standard Campus Development Services and submit using the "Submit Request" button at the end of the form

This form should only be completed by staff from the Campus Development Division

Your Details: These sections auto-populate when you login

Finance forms

Your details

Name	Rochelle McFarlane
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Department	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"/> International travel	<input type="radio"/> Research invoice
<input type="radio"/> Mobile device	<input type="radio"/> Donation invoice
<input type="radio"/> Quota request	<input type="radio"/> Credit note
<input checked="" type="radio"/> Campus Development	

Campus Development


Your Request:

1. Form type - select "Campus Development"
2. Send purchase order – Project Manager is to liaise directly with the supplier

Send purchase order *

Send PO only to me

Aconex Cost Code

 Please provide a supplier to purchase from if you know it or leave this blank.

Provide Supplier to purchase from

Project

Stage

3. Aconex Cost Code – select from dropdown
4. Supplier – start typing name this will pull from existing approved Suppliers. You can also enter this manually
5. Project – select from dropdown.
6. Stage - select from dropdown,
 - 01 Feasibility or 05 design and construction
7. Currency – pre-populates with the suppliers currency, this can be overwritten

	Description of services *	GST	Price	Account number
1	Provide service as per Q	<input checked="" type="radio"/> Ex <input type="radio"/> In <input type="radio"/> NA	26000.00	PL
				115572.01.V.ZB
				3731.00
				e.g. 999999.99.X.XX
				3241.00
	Analysis code: Client Cost			
Totals			Total	GST
			\$26000.00	\$3900.00
				Total incl. GST
				\$29900.00

8. Description of service – describe the work to be undertaken, mandatory field
9. GST – select if the cost is Exclusive or Inclusive of GST on NA
10. Price – the amount as an estimate or quoted, if an estimate be sure to advise this in the Notes for Purchasing
11. Account number – This is auto populated as you select from the earlier fields and tab through.
12. Analysis code – select from dropdown box.
13. Total – automatically calculates from information if using multiple lines
 There are 2 add row buttons on the left of the form, 1 under description of services and 1 under the number of the last description field. Adding a second line might be your opportunity to include any contingency details that should only be known by the University and not shared with the supplier
 To remove a row, click the black cross next to the item number to remove the row
14. Notes for Purchasing Team – special notes to the Purchasing Team, any additional information that needs to be added is an contingency details
15. Notes for Supplier – special notes you want to put on the PO being sent to the supplier, i.e. your contact details or another contact on campus, or special instructions

Notes for purchasing team - Record the paper manual PO Number here

Notes for supplier

16. 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
17. Attach documents – attach any relevant documents here, they can be any format

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

Authority *

I have authority Approval attached Budget holder approval via workflow

Attach documents (if required)

Browse... No file selected.

✓ Submit request

18. Submit request – click to submit to the Purchasing Team to process the order. You will receive confirmation it has been submitted

- Once the Finance One order is completed you will receive an email with the Purchase Order attached. You should advise the Supplier what the number is and that they must quote this on all invoices going forward
- As Invoices arrive, Supply Chain will seek confirmation that the service has been delivered and the agreed value has been charged at that time