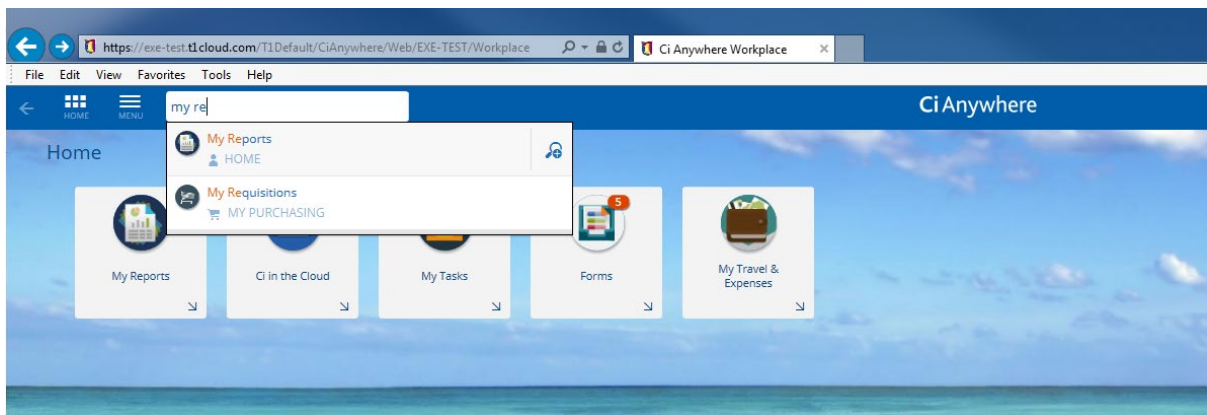


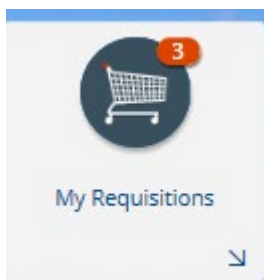
Purchasing with CloudBuy from the 1st August 2018

This is a quick guide for purchasing in CloudBuy in T1 from the 1st August.

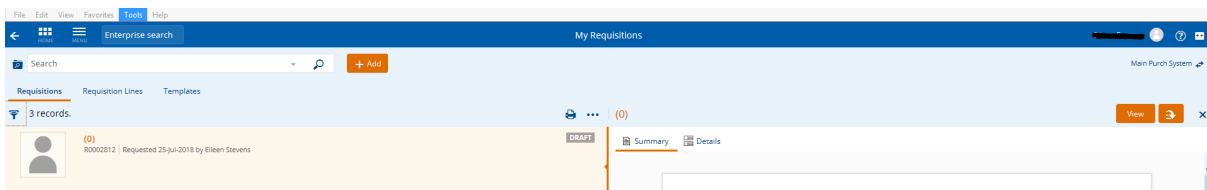
Once logged into T1 with your single sign on, you can navigate to the My Requisitions icon by either searching Requisitions in the Enterprise Search




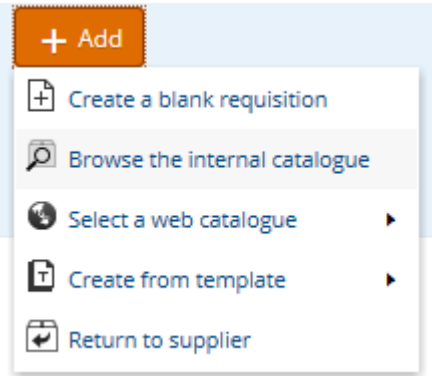
Or using the right pointing arrow halfway down the screen. The Requisition tile/icon is shown below



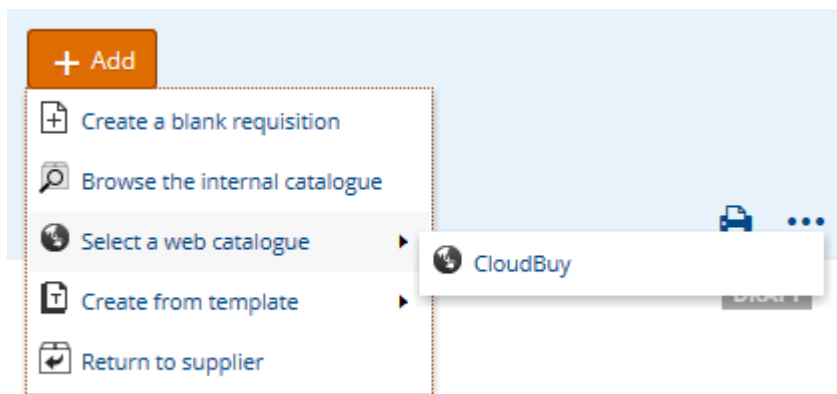
Click on the tile/icon to open and the below screen is displayed, on day one it will show no records are found. Clicking on the +Add will open a drop down list.



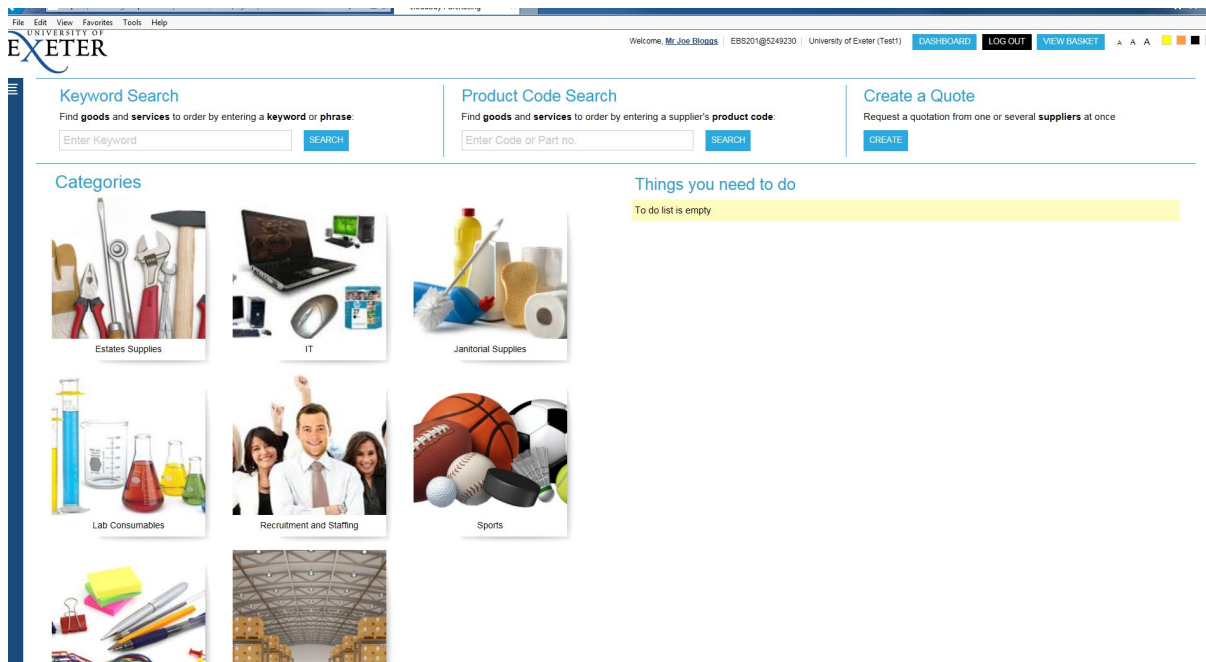
Click on the  at the top of the screen and this will display a drop down list



From this click on 'Select a web catalogue' which will display the CloudBuy link



The below page will be displayed




In the search enter for example test tubes

Keyword Search


Find **goods** and **services** to order by entering a **keyword** or **phrase**:

And click search, the results will be displayed as below

Welcome, [Mr Joe Bloggs](#) | EBS201@f249230 | University of Exeter (Test1) [DASHBOARD](#) [LOG OUT](#) [VIEW BASKET](#) A A A ■ ■ ■ ■



SET
Pencil Set




250ml Glass Test Tube
[LAB CONSUMABLES LTD](#)
9876
PK
250ml Glass Test Tube

£33.22

1 [ADD TO BASKET](#)

Stock Level: 100




7ml Glass Test tube
[LAB PLASTICS LTD](#)
1211
PK
7ml Glass Test tube

£12.20

1 [ADD TO BASKET](#)

Stock Level: 100




7ml Glass Test tube
[LAB SUPPLIES LTD](#)
1311
PK
7ml Glass Test tube

£17.80

1 [ADD TO BASKET](#)

Stock Level: 200




7ml Glass Test tube
[LAB CONSUMABLES LTD](#)
9855
PK
7ml Glass Test tube

£12.28

1 [ADD TO BASKET](#)

Stock Level: 94




7ml Glass Test tube
[THE SCIENCE CONSUMABLES COMPANY LTD](#)
1411
PK
7ml Glass Test tube

£11.50

1 [ADD TO BASKET](#)

Stock Level: 100




250ml Glass Test Tube
[THE SCIENCE CONSUMABLES COMPANY LTD](#)
1410
PK
250ml Glass Test Tube

£33.20

1 [ADD TO BASKET](#)

Stock Level: 200



250ml Glass Test Tube
[LAB SUPPLIES LTD](#)
1310
PK
250ml Glass Test Tube

£37.55





1 [ADD TO BASKET](#)


Stock Level: 100

Chose the required item and amend the quantity if required.




Click ADD TO BASKET [ADD TO BASKET](#) .

And the below screen will open

 **Basket**   

 If adjusting a quantity you will need to use the Update button.
PLEASE REMEMBER that for security reasons, once you go to the checkout, you have finished shopping and can no longer ADD any items. To view any extra product information (including form details such as size) please select "I" adjacent to the line item.

Ordering from [Lab Consumables Ltd](#)

Item Description	Price	Quantity	Update	Net Value	% Tax	Tax	Total	Remove?
250ml Glass Test Tube 250ml Glass Test Tube <small>Part Code = 9876 UOM = PK </small>	£39.86	1		£33.22	20.00%	£6.64	£39.86	

BASKET TOTAL - TO PAY **£33.22** **£6.64** **£39.86**

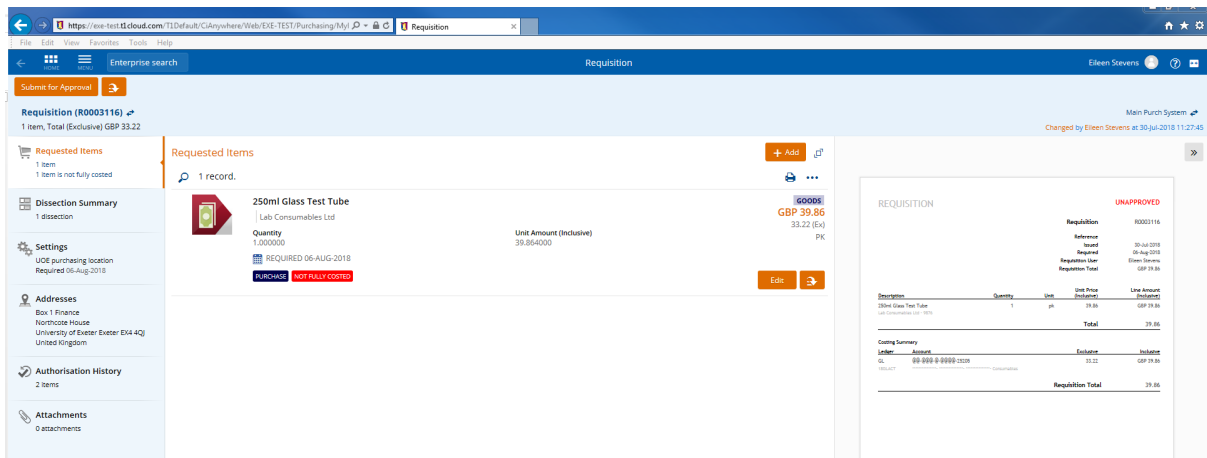
[RETURN TO MAIN SITE](#)
[ADD MORE TO BASKET](#)
[EMPTY BASKET](#)
[GO TO CHECKOUT](#)

Powered by cloudBuy

Select GO TO CHECKOUT and this will return you to T1 as below



and this will



Click on the Edit button and check the detail are correct under each heading and complete where necessary. Under the following headings:

- Item
 - add any appropriate comments – These are internal comments only and will not appear on the purchase order.
 - Purchase type will default to 'Goods' but this can be changed to 'Services' if appropriate
- Alternative Contact Information
 - Complete if required
- Procurement Information
 - Fields will become mandatory based on the value of the requisition and will follow the current University Procurement Business Rules
- Biological Services
 - Select an option from the drop down if your purchase falls into one of these categories. This

will route your requisition for the necessary approval

- Health & Safety

- Select an option from the drop down if your purchase falls into one of these categories. This will route your requisition for the necessary approval

- Additional Supplier Information

This field will become mandatory if a supplier which has been flagged as 'Self Employed' has been selected. You will be required to select 'yes' from the drop down menu and attach a PD27 form

- VAT Criteria

- This relates to purchases for Medical or Veterinary research where the item maybe eligible for VAT exemption. This replaces the current VAT exemption form. If yes is selected you will also be required to select a reason for eligibility

^ VAT Criteria

Is your Purchase eligible for zero rated VAT?*

YES (Yes) ▼

Reason for eligibility ▼

^

Selection Code	Short Description	Description
CHARAD	Charity Advertising	Charity Advertising
COMPS	Computer Software	Computer Software
EQUIP	Qualifying Equipment	Qualifying Equipment
SUBST	Medical and Scientif	Medical and Scientific Substances

🔍 Advanced search

- Cost Account

The charge type will default depending on which College or Service is linked to the user profile

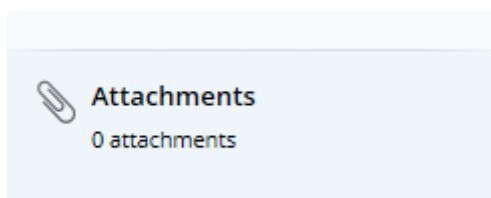
An appropriate charge code will have to be selected by using the drop down box or the advanced search option

Cost Account

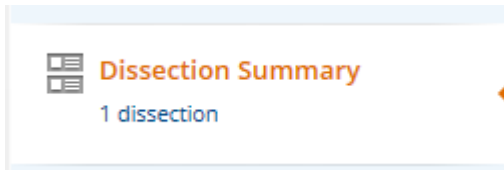
Charge Type* \$DEFAULT (Default Item/C	Charge Code* NA (Not Applicable)
Ledger* GL (18GLACT)	Account* @@-@@@-@-@@@@-25205 (Co
VAT Rate* S (Standard Rate)	
<input type="checkbox"/> Apply Cost Account To All Lines	<input type="checkbox"/> Add Another Cost Account

Change the Ledger from GL to PJ if the purchase is project related

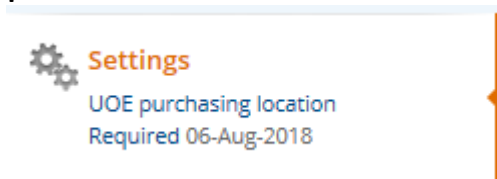
To add attachments select the 'Attachments' option from the left hand menu. These will only be attached to the requisition they will not go out with the purchase order



The Dissection Summary – this confirms the costing information already entered on the requisition line



Settings - These details should default from the user profile



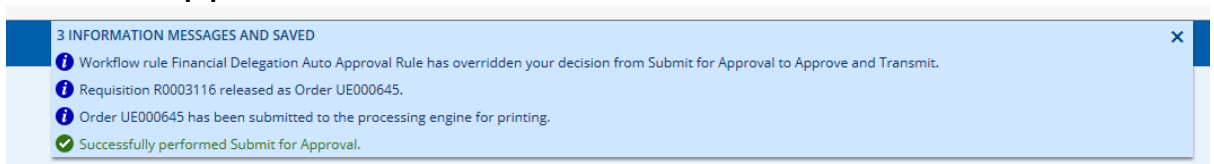
Addresses – Delivery instructions can be entered here in the free text field. Comments will appear on the Purchase Order



Once completed click on Submit for Approval



An information message will be displayed and confirmation the item has been submitted for approval or auto approved due to the value



This example has auto approved as the value is below £100.00

The item is in the purchaser's My Tasks completed items

(1) 250ml Glass Test Tube - GBP 39.86

Summary

Task Description*
Create Requisition

Assigned to
Eileen Stevens

Received
30-Jul-2018 11:23:51

Details

Process View

Create Requisition		Eileen Stevens
Created Eileen Stevens	🕒 11:23:51	📅 30-Jul-2018
Assigned to Eileen Stevens Eileen Stevens	🕒 11:23:51	📅 30-Jul-2018
Approve and Transmit Eileen Stevens	🕒 11:55:57	📅 30-Jul-2018
Generate Documents		Eileen Stevens
Assigned to Eileen Stevens Eileen Stevens	🕒 11:55:58	📅 30-Jul-2018
Notify Approve		
Process Completion		

Workflow Information

Process
UOE Requisition

Originator
EBS201 (Eileen Stevens)