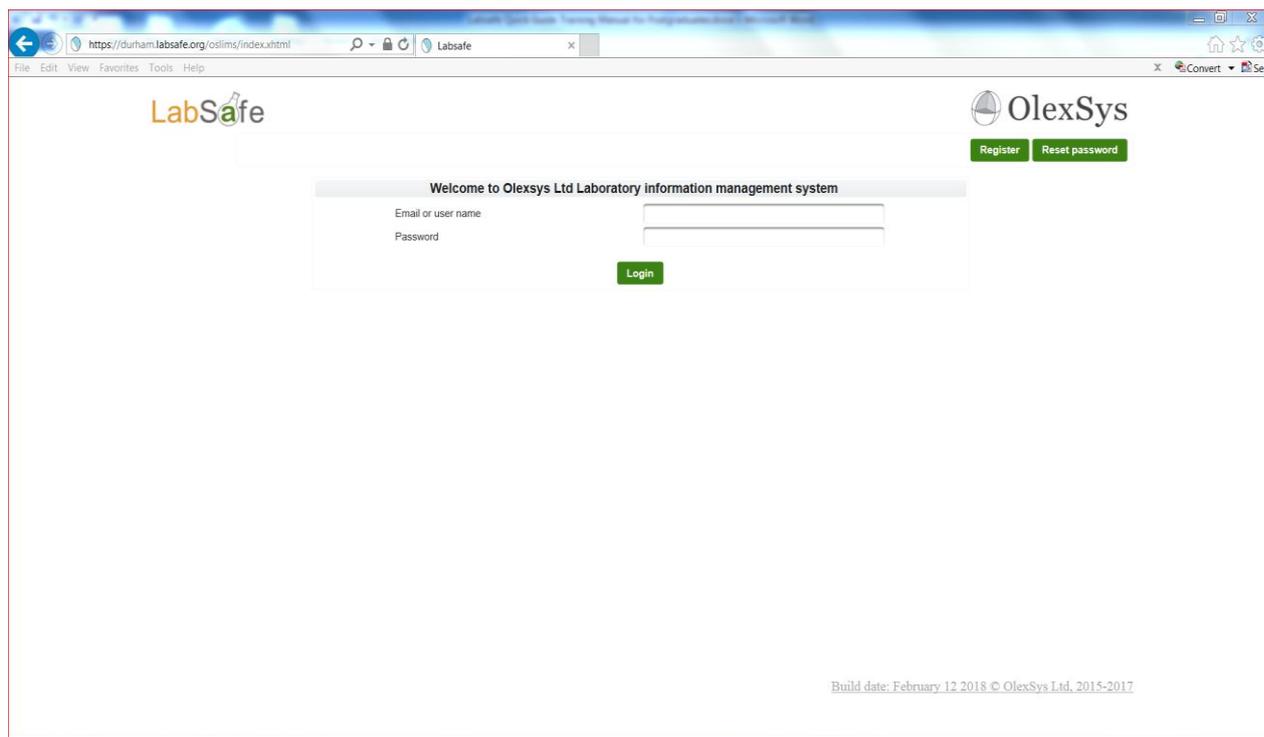


Labsafe Quick Guide Training Manual for Postgraduates



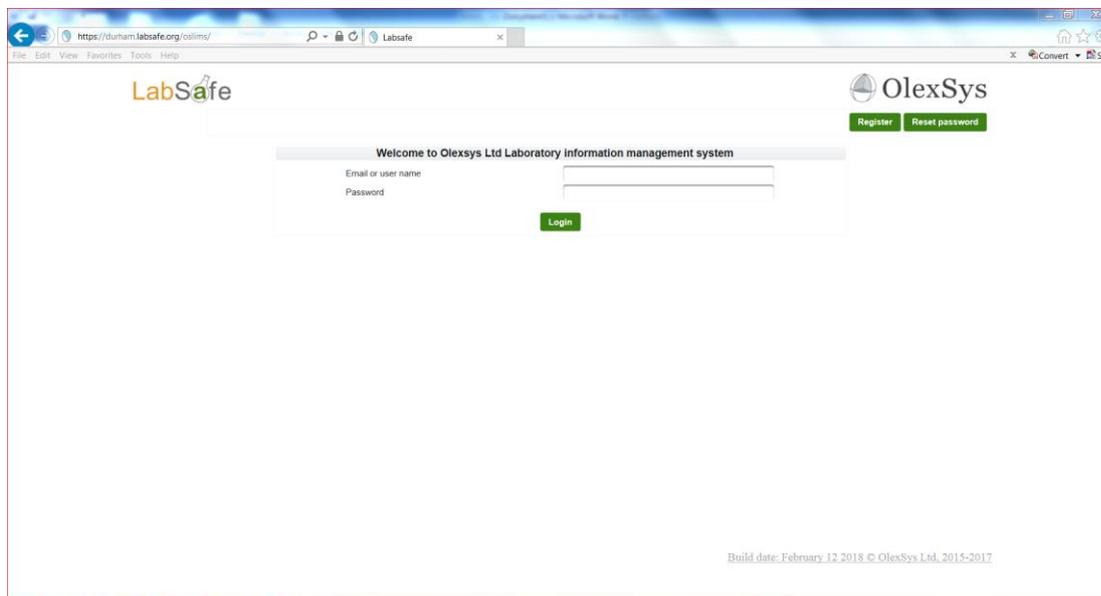
Contents:

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1) Logging onto Your Account

Log onto your Labsafe account from the home page. Ensure that you use the following link, there are external links which you will not take you to the log in page you require:

<https://durham.labsafe.org/oslims/>



2) Placing an Order

Click on the Order shopping trolley



3) Request for Payment / Student Reimbursements

In the "Supplier" field, Select "Request for Payment" and chose the currency you are claiming in which in most cases will be "£".

The screenshot shows the LabSafe web interface. At the top left is the LabSafe logo. Below it is a navigation bar with a 'Home' button and several dropdown menus: 'System administration', 'My group(s)', 'Administration', and 'Inventory'. On the right side of the navigation bar are icons for a shopping cart and a warning. The main content area is divided into sections. The 'Order information' section includes fields for 'On behalf of' (Mrs Helene Rusby), 'Supplier *' (with a dropdown menu open), 'Funding account *' (062RTSG - Externally Funded Students), and 'Destination *' (CM201 - Maths). The 'Supplier *' dropdown menu is open, showing 'Request For Payment €/€' and 'Request for Payment Form/£'. Below this is the 'Current order content' section, which is currently empty. At the bottom of the form is a green button labeled 'Place the order for approval' and a checkbox labeled 'Is this a credit card order?'.

Select your relevant funding account. You will only have access to the funding accounts you are linked to. If you do not have access to an account you require then please contact a member of the Finance Team and they can set this up for you.

Ensure the destination is your department, this should automatically default.

You can select who you want to deal with your claim/order but advisable in most cases to leave as "no preferences".

Funding Account

This screenshot shows a different part of the LabSafe interface. It features the same navigation bar as the previous screenshot. The 'Order information' section is visible, with 'On behalf of' (Mrs Helene Rusby), 'Supplier *' (Request for Payment Form), 'Funding account *' (062RTSG - Externally Funded Students), and 'Destination *' (CM201 - Math). The 'Handle by' dropdown menu is open, showing 'No preferences'. Arrows from the text above point to the 'Supplier *' field, the 'Handle by' dropdown, and the 'Destination *' field.

Click on “+ Click here for order comment, delivery charges, handling instructions and files/quotes”

The screenshot shows the LabSafe web application interface. At the top, there is a navigation bar with the LabSafe logo, a 'Home' button, and several dropdown menus for 'System administration', 'My group(s)', 'Administration', and 'Inventory'. On the right, there are icons for a shopping cart and a warning, along with a 'Log out' link. The main content area is titled 'Order information' and includes fields for 'On behalf of' (Mrs Helene Rusby), 'Supplier' (Request for Payment Form), 'Funding account' (062RTSG - Externally Funded Students), and 'Destination' (CM201 - Maths). A prominent green button with a plus sign and the text '+ Click here for order comment, delivery charges, handling instructions and files/quotes' is highlighted. Below this, the 'Order notes / Supplier details' section contains the text 'Travel claim, Germany, Utopia Conference, 20-25 Feb 18' and a URL 'https://apps.dur.ac.uk/travel.forms/'. The 'Delivery charges' section shows '0.00'. The 'Order quote/files' section has a green button '+ Click to choose or drag and drop' and a file named 'Revised - RFP Blank.xlsx'. The 'Current order content' section shows a table with one row: 'Empty order' with a price of '£0.00'. At the bottom, there is a 'Create new order line' section with fields for 'Item name', 'Catalogue number', 'Amount', 'Number of containers', 'Multipack of', 'Price / £', 'Container', 'Visibility', and 'Department'. The 'Item notes' field contains 'Travel claim, Germany, Utopia Conference, 20-25 Feb 18'. At the bottom right, there are 'Cancel the item' and 'Add the item' buttons.

In the “Order notes/Supplier details” section add a short specific meaningful description. i.e. **“Travel claim, Germany, Utopia Conference, 20-25 Feb 18”**. Short and simple with enough identifying information is sufficient. **Please always include a link to your Viator travel form or your departmental travel approval form** so that this can easily be viewed and checked against your claim. Your claim may be rejected without this causing delay in receiving payment.

By clicking on “+ Click to choose or drag and drop” will allow you to attach your completed request for payment form. Your Request for Payment (Appendix 1) is where the informative details should be displayed. **You must also attach good scanned receipts which can be clearly read.**

The next step is to create a new order line, as per below:

Current order content

Name	Price	Number of containers	Line price
Empty order			

Order total: £0.00

Create new order line

Item name * Catalogue number *

Amount * item(s) Number of containers * Multipack of * Price / £ *

Container n/a Visibility Department

Item notes

Cancel the item Add the item

Place the order for approval Is this a credit card order?

In the "Item name" field you can select from the drop down menu. As you have already identified your supplier as "Request for Payment", you need to select the item name in relation to this. You should select "Student Reimbursement" as this will relate to any expense you are claiming on a Request for Payment process. The catalogue number and amount will default accordingly.

Please enter the total cost of your overall claim.

Order total: £0.00

Create new order line

Item name * Student Reimbursement x Catalogue number * n/a

Amount * 1 item(s) Number of containers * 1 Multipack of * 1 Price / £ * 160.59

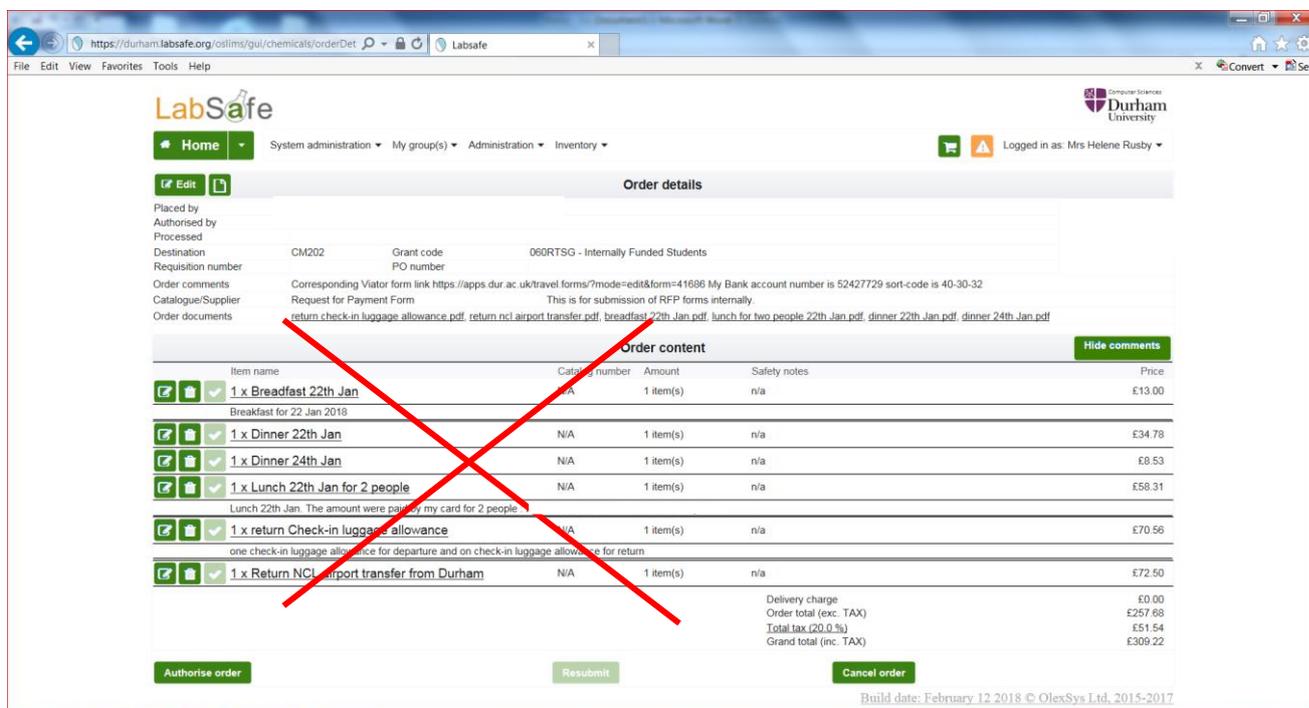
Container n/a Visibility Department

Item notes

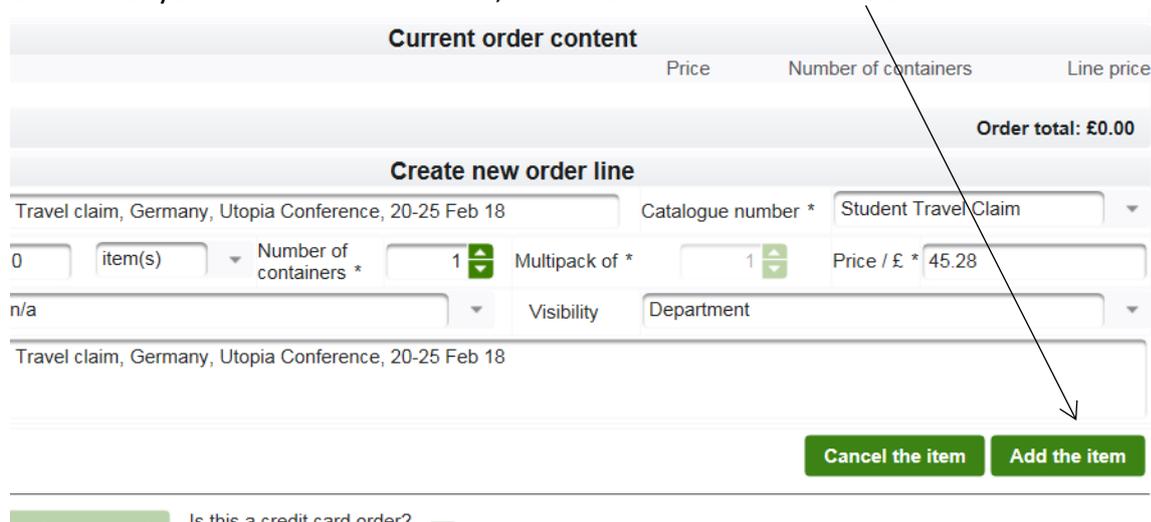
Add the item notes here, this can be cut and pasted from above **"Travel claim, Germany, Utopia Conference, 20-25 Feb 18"**. Once you have entered your line detail then click "Add the item"

Add the item

Do not enter each item that you are claiming for on a separate line, you just need to add one line for the overall claim. All of the individual items should be listed in your Request for Payment which you have attached. By entering a separate line on the Labsafe order you are creating a barcode for each individual line. This should only be entered this way if you are ordering consumables, chemicals, equipment etc. so that you have a unique barcode reference to your items.



Once all of your information is added, click the “Add the item” button:



You will now see your item has been added. You then need to “Place the order for approval”

The screenshot shows the Labsafe ordering system interface. At the top, there is a navigation bar with 'home' and a dropdown menu. The main header includes 'System administration', 'My group(s)', 'Administration', and 'Inventory'. On the right, there is a shopping cart icon, a warning icon, and the text 'Logged in as: M'. Below the header, the 'Order information' section shows 'On behalf of Mrs Helene Rusty', 'Supplier * Request for Payment Form', 'Funding account * 062RTSG - Externally Funded Students', and 'Destination * CM201 - Maths'. A link is provided to click for order comment, delivery charges, handling instructions and files/quotes. The 'Current order content' section displays a table with one item: 'Travel claim, Germany, Utopia Conference, 20-25 Feb 18' with a price of £45.28 and 1 container. The 'Order total' is £45.28. Below this is the 'Create new order line' section with fields for 'Item name *', 'Catalogue number *', 'Amount *', 'Number of containers *', 'Multipack of *', 'Price / £ *', 'Container', 'Visibility', and 'Department'. There is also an 'Item notes' field. At the bottom, there are buttons for 'Cancel the item' and 'Add the item', and a 'Place the order for approval' button. A checkbox for 'Is this a credit card order?' is also present.

The order will then be sent to your supervisor/account holder for approval before it reaches the Finance Team for processing. It is essential that a link to your Viator/travel form is included in your order/request to allow your supervisor the access to details of your trip.

Once your supervisor has approved your order, it will be sent the Finance Team for processing.

4) Ordering Travel

All ordering will follow the same process as above but you will need to select the relevant supplier. If you requesting travel then you need to select Dawson & Sanderson as your supplier and attach your travel quotation/s. Again, you need to attach/link your Viator/travel approval. If you have seen travel cheaper from an online supplier, remember that Dawson & Sanderson will price match. Dawson are the University contracted supplier so we must use them. You should be requesting your travel to be booked with Dawson via Labsafe and should only be claiming your expenses for local costs.

5) Ordering all Other Items

Again, you need to place all orders via Labsafe choosing the relevant supplier. Should the supplier you wish to use not be available in the drop down supplier menu the please select

“new supplier”. You should always attach either a quote or a link to the item you are requesting to purchase. In cases where you have been quoted a specific price, you must include the quotation in order to guarantee that price. Please also consider and include any delivery/postal charges in your order.

6) Approvals/How to Know When your Order is Processed

Once your order has been processed by the Finance Team, the order will be marked as purchased and relevant information will be added. You will receive an email to say that your order has been placed. If it's a reimbursement the date that it has been processed should be added to give you an indicate of when payment will be made. For travel and other orders, a purchase order number will be included where relevant. Normally for travel orders a Purchase Order will be provided and in most cases the Finance Team will email Dawson & Sanderson the order number to make the booking copying you into the email. You will then need to finalise anything outstanding, generally final confirmation details which is required by you.

7) Benefits of Labsafe

- You can check the status of your claim and will always have an audit trail and electronic copies of all of your submissions.
- This reduces duplication and improves efficiency.
- Any member of the Finance Team can access your orders via Labsafe allowing transparency and smooth workflow within your own department and across other departments.
- No need to keep copies yourself and you have previous records of your expenditure/orders
- Expenditure can be monitored and where applicable, the system will not allow any orders to be submitted when there is no funding available.

8) Trouble Shooting

- Should you have a problem logging onto Labsafe, check you have accessed the relevant web address, there are different addresses but the one you require is: <https://durham.labsafe.org/oslims/>
- Error messages: should you encounter any error messages you will need to contact a member of the Finance Team, maths.finance@durham.ac.uk, h.e.rusby@durham.ac.uk, oleg.dolomanov@durham.ac.uk
- Your order has not been approved: if you contact any of the above they will be able to have a look at the status of your order and follow this up for you
- Any other problems then please contact one of the above and you will be assisted with your problem.

Appendix 1

Request for Payment – Student Claim Form

REQUEST FOR PAYMENT				
Contact for queries: Name:		Finance Office	Telephone: 43074	
Please read the accompanying notes before completing this form.				
Payable to (payee name and address):		Payment method:		
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>		<input type="checkbox"/> UK cheque <input type="checkbox"/> UK bank transfer (over £1,000) <input type="checkbox"/> Overseas payment		
		UK bank account details:		
		Sort code		
		Account number		
Payee category		<input type="checkbox"/> Employee <input type="checkbox"/> Student - enter ID number		
Postcode:		<input type="checkbox"/> Visitor <input type="checkbox"/> Other (please state)		
Type of Payment - select one of the types listed below				
<input type="checkbox"/> Student or visitor <input type="checkbox"/> Statutory charge <input type="checkbox"/> Course, conference or media				
<input type="checkbox"/> Corporate subscription <input type="checkbox"/> Third party request <input type="checkbox"/> Petty cash & cash drops				
<input type="checkbox"/> Self employed music / ent. (questionnaire attached) <input type="checkbox"/> Customer refund <input type="checkbox"/> Other (please provide details below)				
Date of Activity	Details and reason for expenditure (please attach relevant documents)	Amount	xrate	GBP
Date:	Event Details:			
	Travel:			
	Subsistence:			
	Accommodation:			
	Registration/Training:			
	Continue on a separate page if necessary categorising costs			
TOTAL				
EXPENDITURE ALLOCATION				
Co	Cost Centre	Account Code	VAT Code	Value
Certified correct for payment by authorised signatory:				
				Name:
				Signature:
				Date:
Description (to appear in Transaction Report):				
FOR OFFICE USE ONLY				
Supplier Number		Voucher Number		