Labsafe Quick Guide Training Manual for Postgraduates
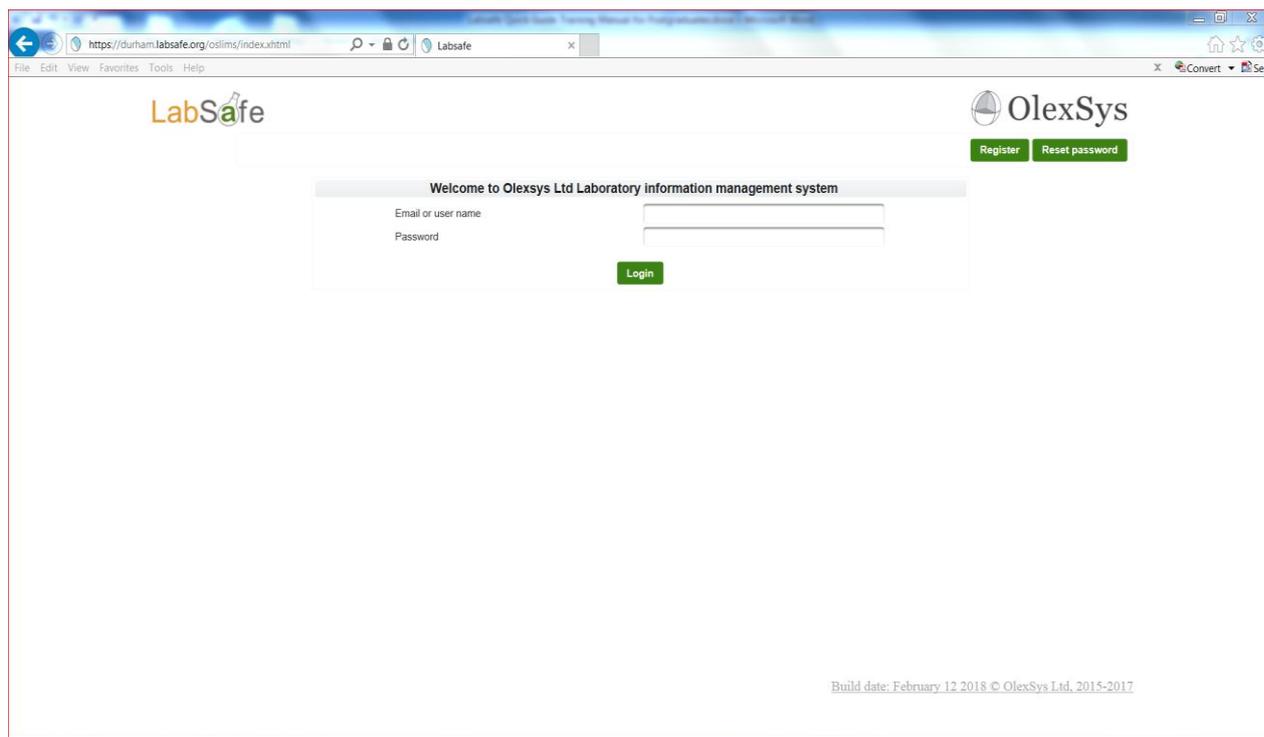
Contents:

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/
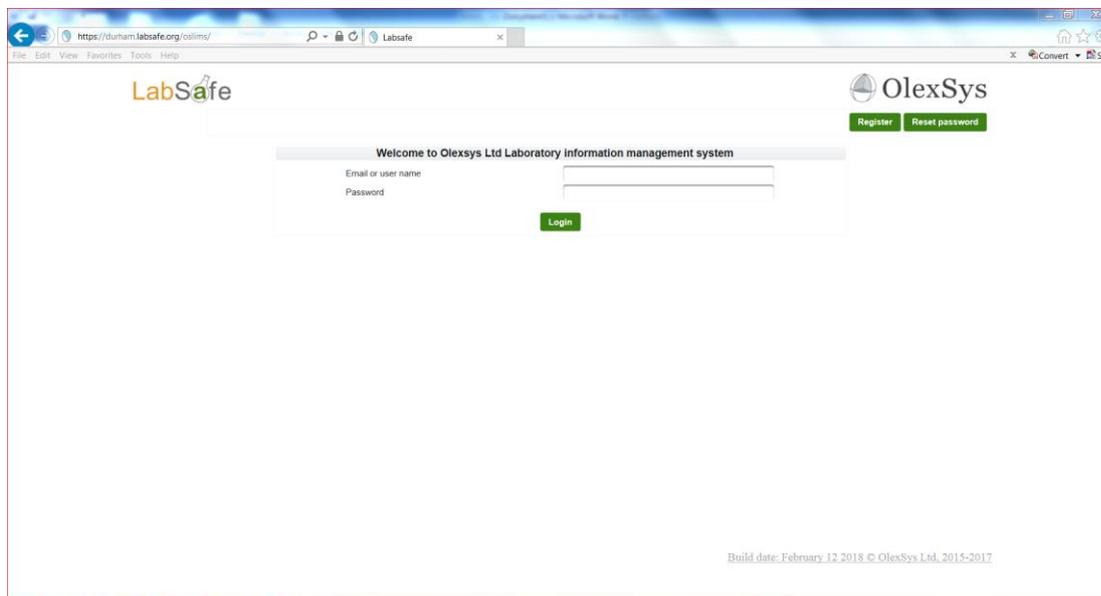
2) **Placing an Order**

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 "£".

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

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

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:

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.

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"

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.
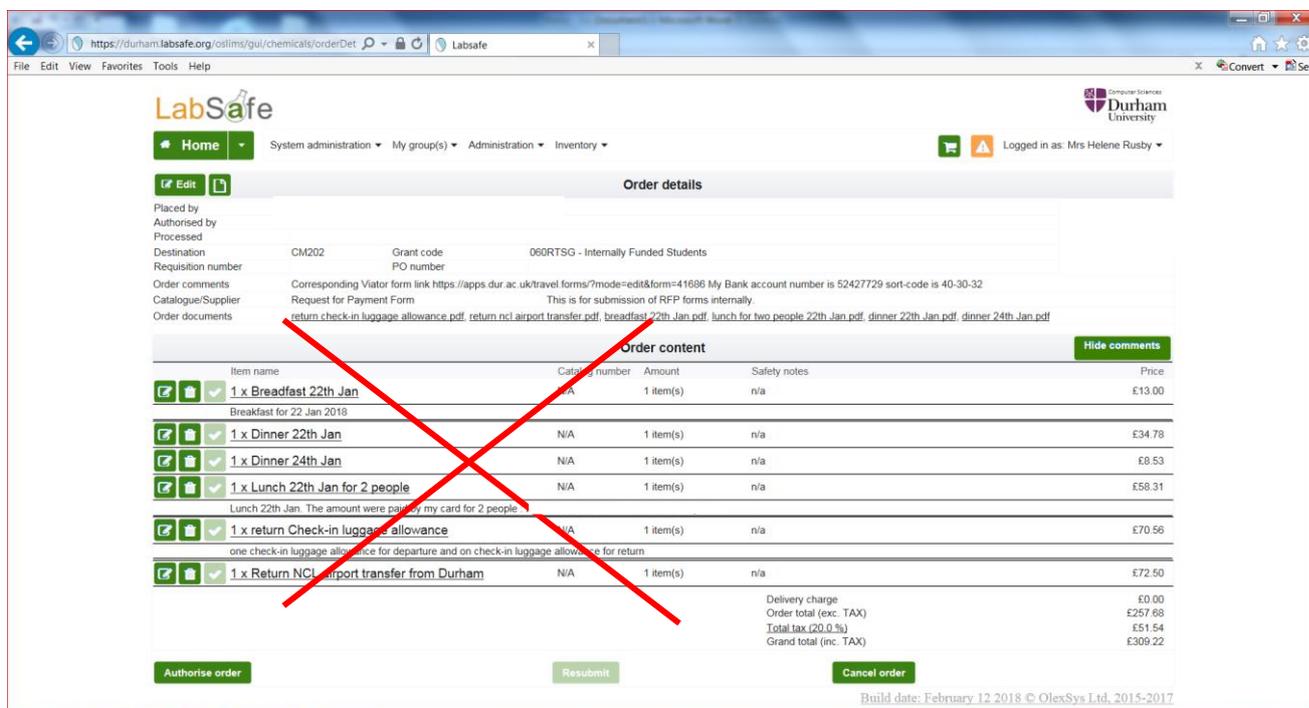
Once all of your information is added, click the "Add the item" button:
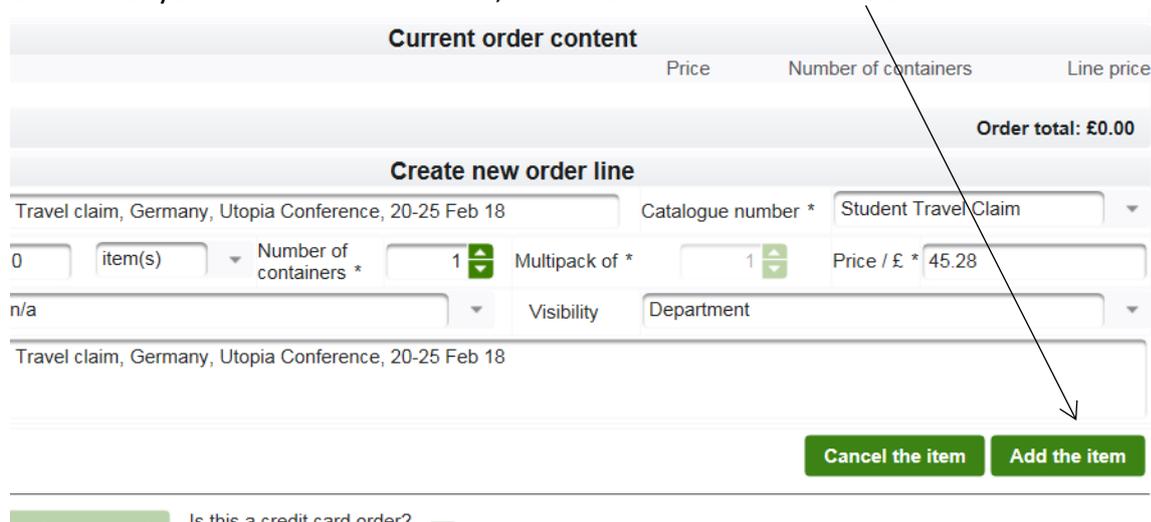
You will now see your item has been added. You then need to "Place the order for approval"

The 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

<table>
<tr><td colspan="4" align="center">REQUEST FOR PAYMENT</td></tr>
<tr><td>Contact for queries:</td><td>Name: Finance Office</td><td colspan="2">Telephone: 43074</td></tr>
</table>

Please read the accompanying notes before completing this form.

Payable to (payee name and address):

Postcode:

Payment method:

UK cheque ☐	UK bank transfer (over £1,000) ☐	Overseas payment ☐

UK bank account details:

Sort code: ☐☐ ☐☐ ☐☐

Account number: ☐☐☐☐☐☐☐☐

Payee category

Employee ☐	Student - enter ID number
Visitor ☐	Other (please state)

Type of Payment - select one of the types listed below

Student or visitor ☐	Statutory charge ☐	Course, conference or media ☐			
Corporate subscription ☐	Third party request ☐	Petty cash & cash drops ☐			
Self employed music / ent. (questionaire attached) ☐	Customer refund ☐	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: Date:

Description (to appear in Transaction Report):

FOR OFFICE USE ONLY

Supplier Number		Voucher Number	