Approving Multi School Purchases

1.1.   Overview

Purchases that cover multiple schools work in a similar manner to normal purchases, in that the request will be entered to the system and it will need approval before becoming an order. Confirmation of goods being receipted and the invoice being matched to the order will following the same process.

The key difference is that they will be entered by a member of the central team so that the cost lines can be allocated to the relevant schools. This means that each school will be able to approve their own costs as for any other purchase.

If a school disagrees with a cost – please **refer the request** back to the Head of Finance with a comment, please **do not reject** it. If you reject it, it will mean that you reject the entire request for every school that is included on the request.

The following illustrates what to look out for to spot these type of requests.

1.2.   Step 1: Go to Purchase Approval.

Menu: Operations – Purchase Requests – My Authorisations

(or the User Favourite on the Home Page)
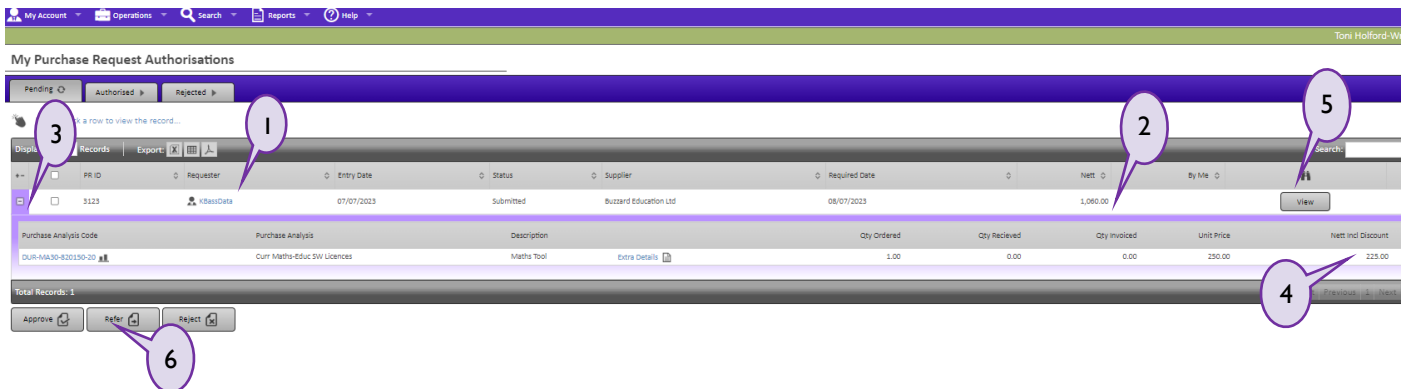
Step	Description
1	Notice the requestor is not someone in school.
2	The amount looks higher than you might expect as it is the total for all schools buying in.
3	Click on the "+" sign to show further detail. This will only show you the schools where you are the budget holder.
4	This is the amount that the school is being charged, net of the discount.
5	View the details to look at more information relating to the purchase.
6	Refer the purchase to the Head of Finance if you are not sure. Please do not reject it as it will reject it for all schools included in the purchase.

DGAT **Finance** Handbook
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1.3. Executive Heads

If you are a budget holder for multiple schools involved in the purchase, your view will include all those schools that are involved as shown below.
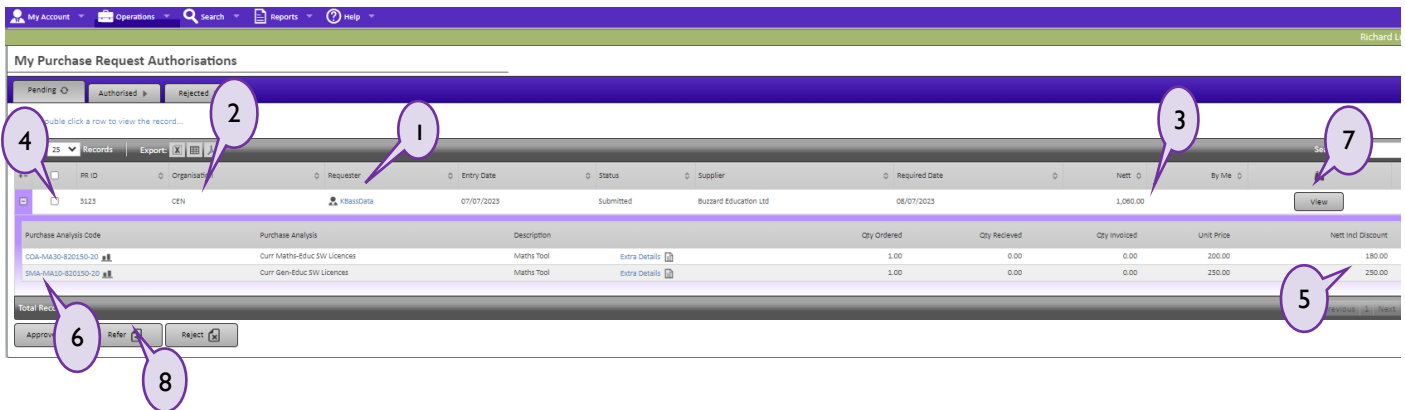
Step	Description
1	Notice the requestor is not someone in school and the organisation is shown as CEN for the Centre.
2	Notice the organisation is shown as CEN for the Centre.
3	The amount looks higher than you might expect as it is the total for all schools buying in.
4	Click on the "+" sign to show further detail. This will only show you the schools where you are the budget holder.
5	This is the amount that the school is being charged, net of the discount.
6	These are the schools coding – the first three characters are the school.
7	View the details to look at more information relating to the purchase.
8	Refer the purchase to the Head of Finance if you are not sure. Please do not reject it as it will reject it for all schools included in the purchase.

1.4. View the details

If details are viewed, then the individual schools information is shown. For executive heads that have multiple schools involved in the purchase, a line for each school will be shown.