Material Management Department Head USER MANUAL

1   INTRODUCTION

The Material Management is a consolidated system to manage stocks and inventory of goods or items purchased in the company. It manages inventory items starting from purchase, approval, requisition, quotation, negotiation, approval of quotation, Consolidation of Quotation, Purchase Order, Good Receipt Note, Quality Checkup, Store Receive Voucher, Stocks, Fixed Assets, and Gatepass.

The system enables the authorized user to raise material request, and concerned SBU representative to take action on the request.

Let's learn how to do basic material request management online.

1.1   PURPOSE

The purpose of this document is to provide step-by-step guidance to the user on how to manage the Material Request and other inventory operations. This document provides complete guidance on understanding the Material Management Process, and help users to navigate through the process easily.

2   GETTING STARTED

To access to the material management, enter the website URL in the browser and the Welcome screen will display on the screen (Refer **Fig. 2-1**)
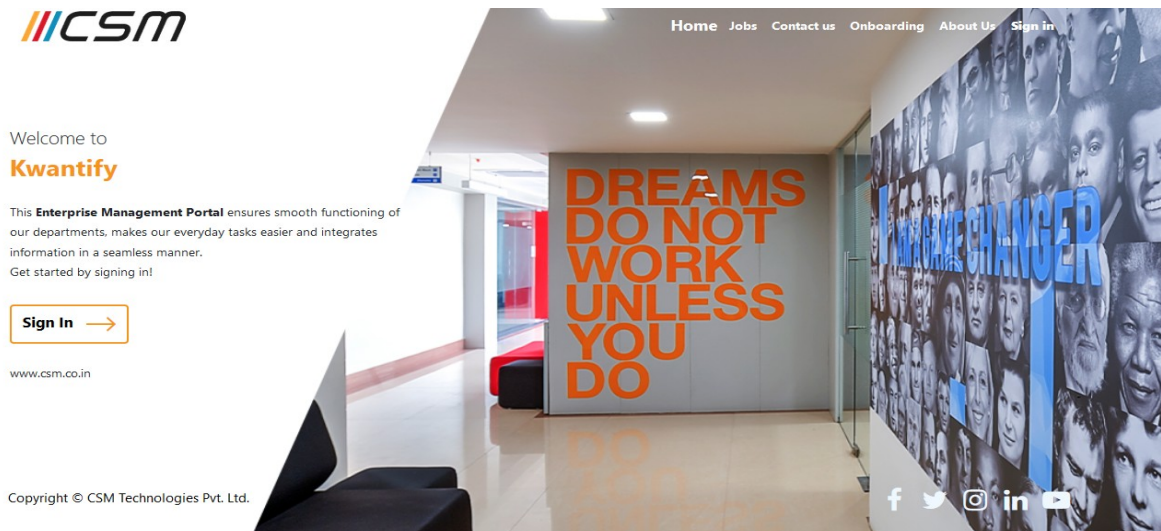
Figure 2-1 Welcome Screen

Refer to Fig 2-1, i.e. click on the **Sign In** button and navigate to the login screen.
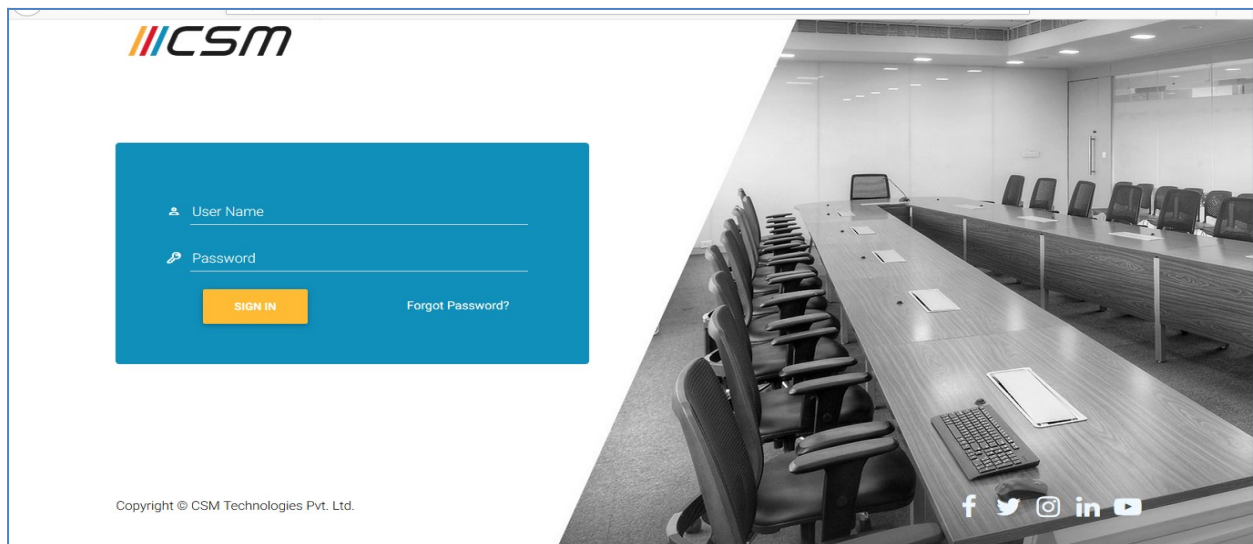

Figure 2-2 Login Screen

Refer Fig 2-2, shown above.

In the Login screen,

- Enter the User Name and Password in the textbox.
- Click on **SIGN IN** button.

On successful login, the user will be navigated to the "**My Dashboard**" screen. Refer Fig 2-3 shown below.
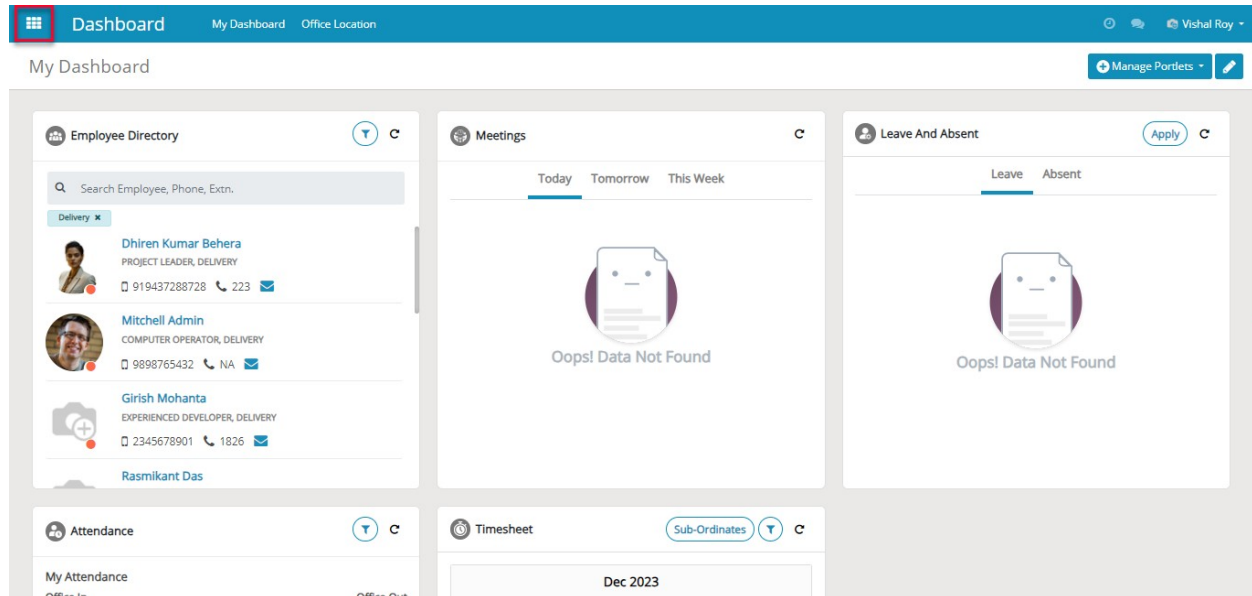

Figure 2-3 My Dashboard

- The dashboard features several portlets for employee directory, timesheet, attendance, etc.
- To go to the menu screen, user can click on **menu** ▦ icon shown on the left-hand side corner of the above screen.

3   MATERIAL MANAGEMENT SYSTEM

This module enables the authorized user to automate the various task associated with handling of materials, starting to raising material request.

On successful submission, the request is forwarded to the SBU Head of the employee user for approval.

3.1.1.1 REQUISITION APPROVAL – DEPARTMENT HEAD LOGIN

Once the requisition is raised for the unavailable item, the respective Department Head of the store manager receives the request for approval.

The User needs to take action on the request received i.e, approve or reject the requisition, and then forward the request to the PR Team for further approval.

For doing so, the Department Head User needs to login into the portal and navigate to Path mentioned below - **Login>>Dashboard>>Menu>>Purchase**
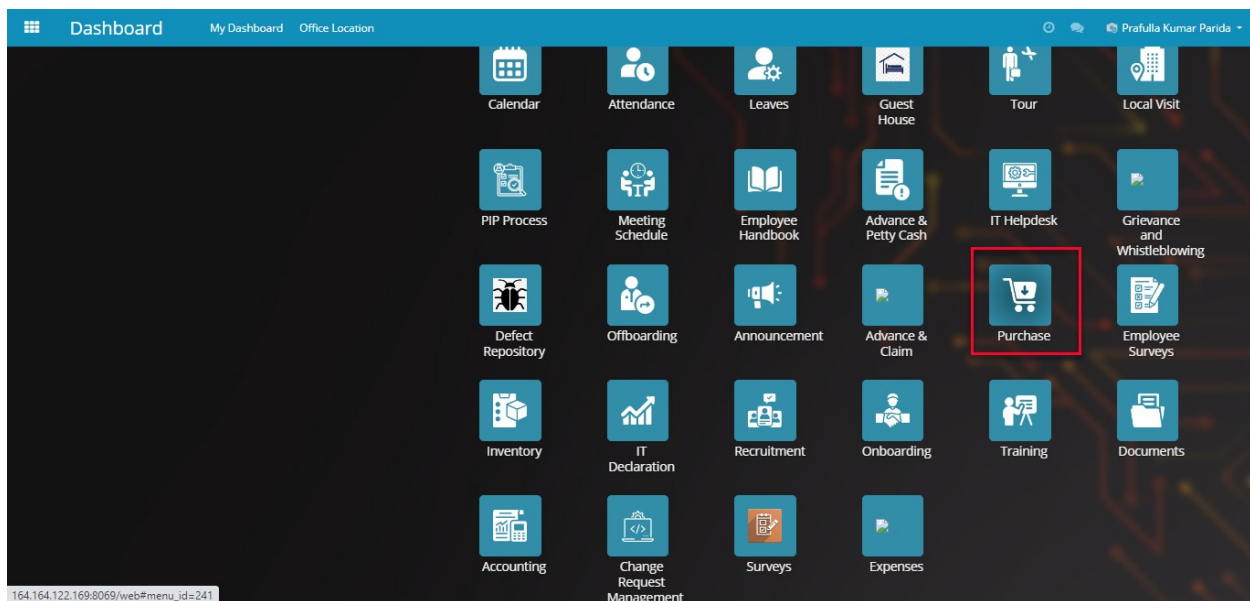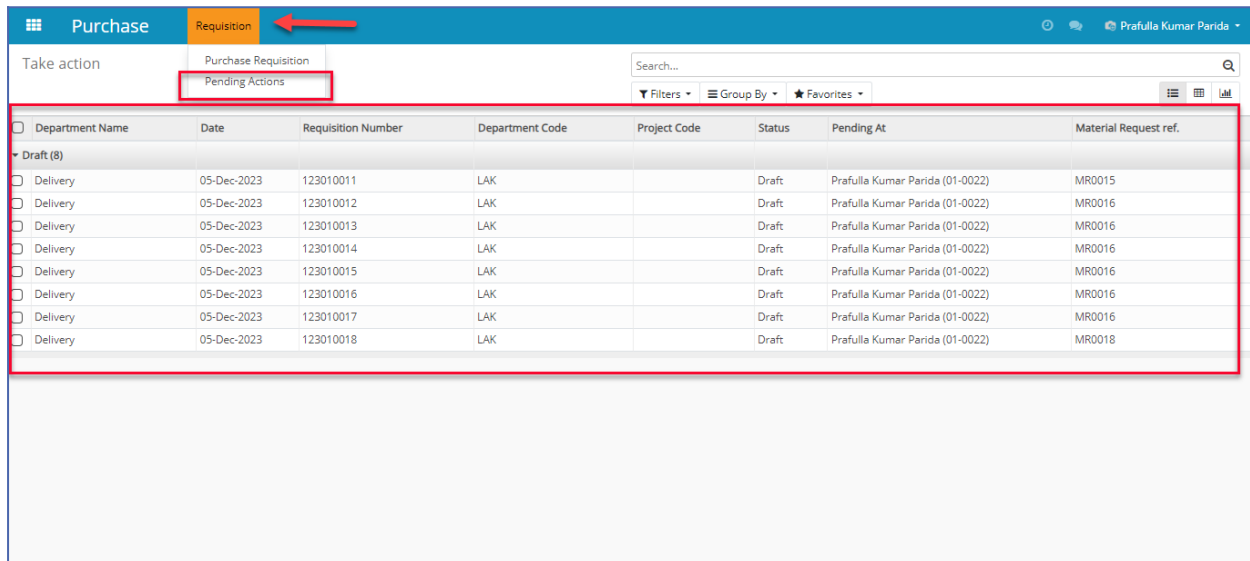

Figure 2-4 Menu Screen – Department Head User

From the list of the module name displayed in the menu screen, click on the **Purchase** module.

Go to - **Purchase>>Requisition>>Pending Actions**

- On clicking the **Pending Actions** link under the Requisition menu link, get navigated to the respective section.

Figure 2-5 Requisition - Pending Actions - Department Head User

- Here, the list of the request received is displayed in a table.
- To view the details of the request, click on the respective requisition request.
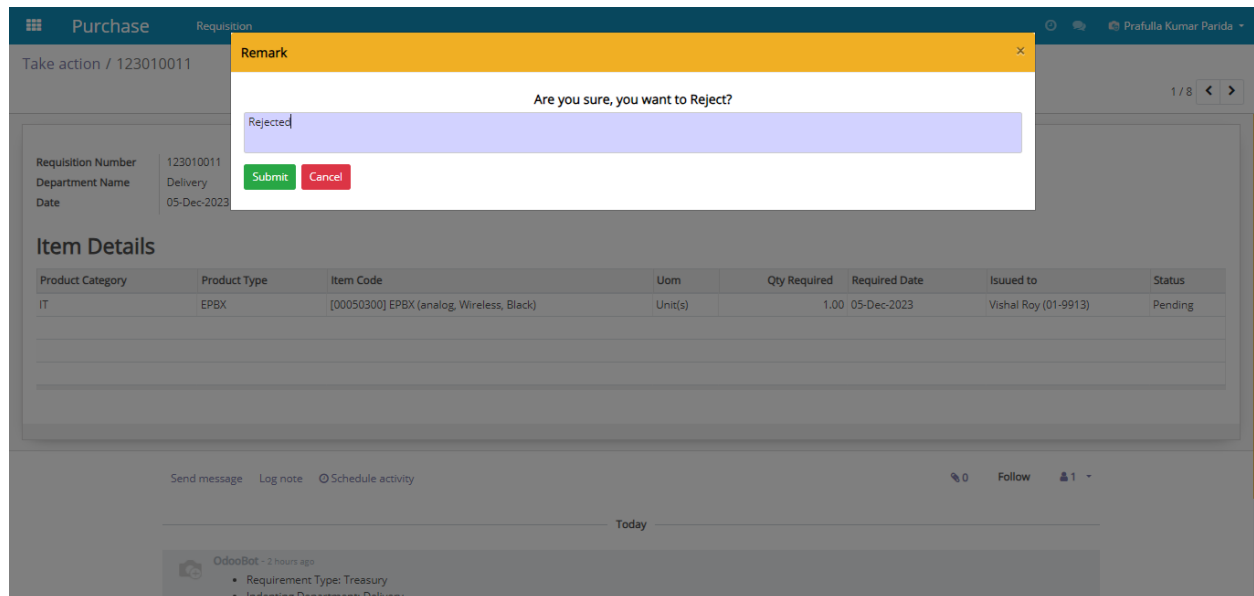
Figure 2-6 Requisition - Pending Actions/Take Action-Department Head User

Reject

- If the request is not valid, then click on the **Reject** button to cancel the request.

On clicking, a confirmation alert message populates on the display screen saying – *Are you sure, you want to Reject?*

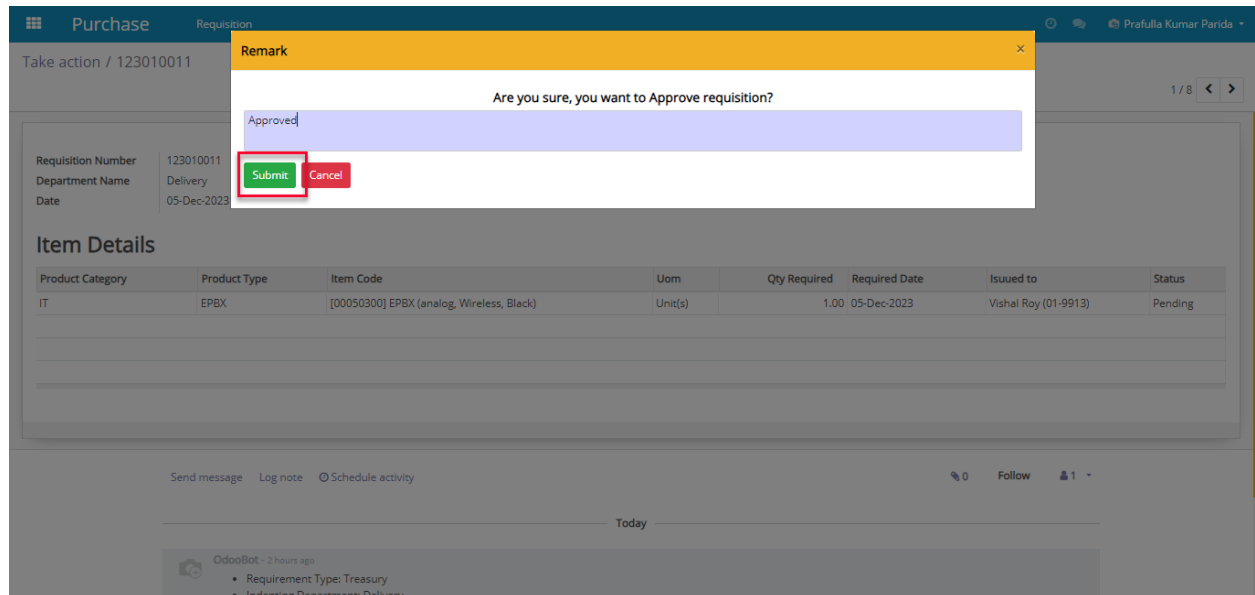**Figure 2-7 Requisition - Pending Actions/Take Action-Department Head User (1)**

- Add remarks for the action to be taken.
- Click on the **Submit** button.
- On successful submission, the request is rejected.

Approve

- To approve the request, click on the Approve button.

On clicking, a confirmation alert message populates on the display screen saying – *Are you sure, you want to approve?*

Figure 2-8 Requisition - Pending Actions/Take Action-Department Head User (2)

- Add remarks for the action to be taken.
- Click on the **Submit** button.

On successful submission, the request is moved to the PR Team.