eTurns

Requisition

Help documentation

Contents

Requistion hiearchy:

If the user wishes to pull certain items from inventory, and they are unavailable at the moment or the user does not have required rights to access the resources; then the user needs to make a requisition to obtain the particular item.

A requisition goes through the following stages from when it is placed, till all the commodities of the requisition are pulled.

i. <u>Un-submitted</u>: When new requisition placed, it attains the status of un-submitted, here the requisition is in compilation stage and can be edited number of times, with those having authorization. The requisitions having this status are reflected in *Un-submitted* tab.
ii. <u>Submit</u>: Once a requisition is made, it gets submitted to be approved by relevant authority. The requisitions submitted are listed in *Approve* tab.
iii. <u>Approve</u>: The submitted requisition is then sent for approval to concerned authority. The authority approving the requisition could also submit and approve the requisition together, if it has required rights. The records having Approved status are reflected in the *Pulls* tab.
iv. <u>Closed</u>: An requisition can be closed under two circumstances:
    a. Auto close: The complete consignment is pulled and thus the requisition automatically closes.
    b. Manual closure: The user due to certain circumstances explicitly chooses to close a certain requisition.

    Under both circumstances, the requisition is deemed to completed, thus closed and such requisitions are listed under *Closed* tab.

This following manual guides the user to use the various functionalities of Requisition module.
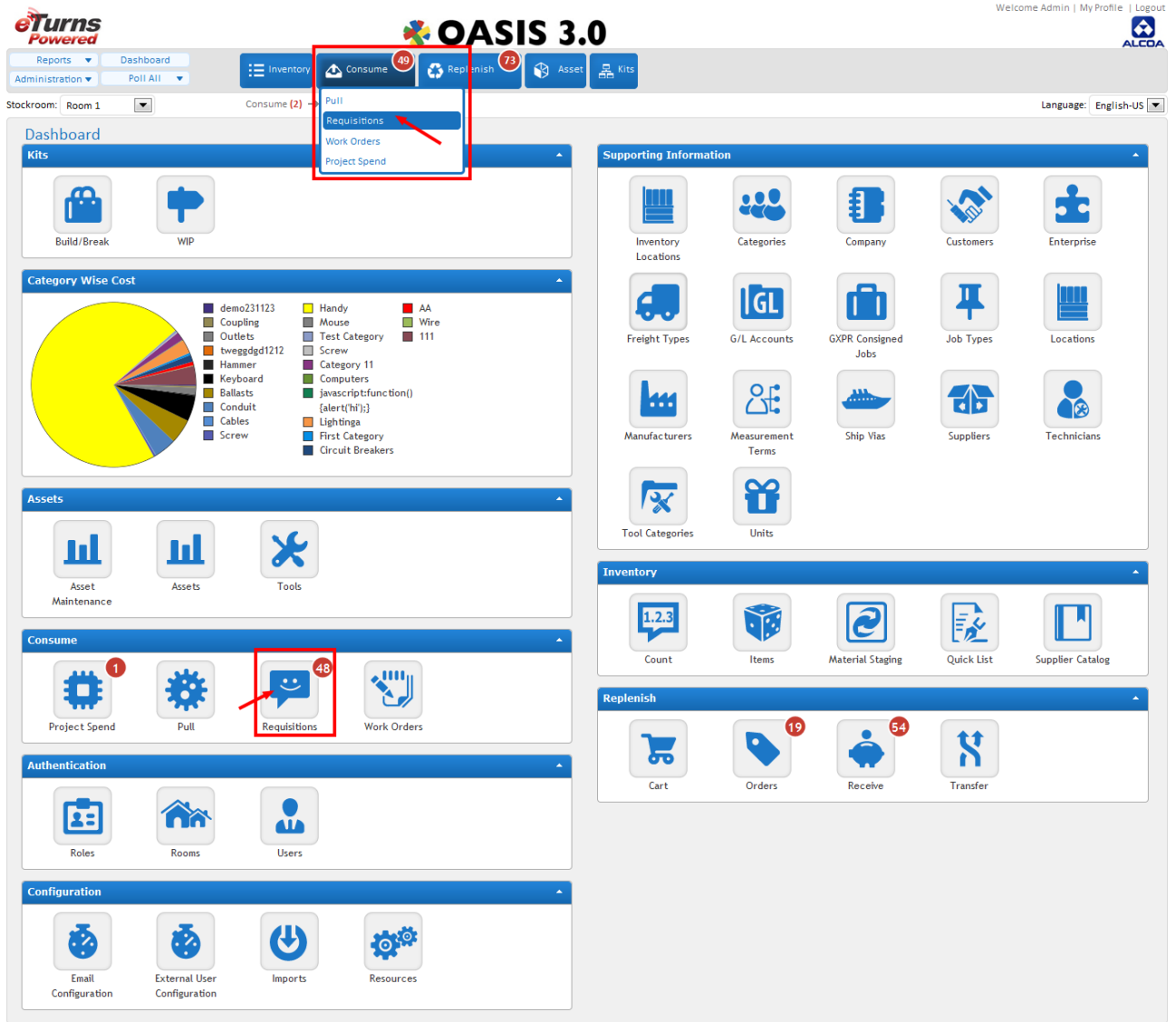
The following tabs are displayed on the Requisition page:

Guidelines

a. Open Requisition

To open requisition, user may either select Requisition from Consume dropdown or simply click the Requisition icon listed under Consume on Dashboard.

Figure 1

The following page appears on screen:

Figure 2

b. Place a New requisition:

To place a new requisition, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- A new requisition number is auto generated every time, but it is editable. Enter the particulars and select Required Date from the calendar pop up. Hit "Save" button, the New Items grid then appears on screen, to add new items from inventory.

Figure 3

Figure 4

- The "New Item" button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click "Add". The user may also enter various quantities together and then hit the "Add All" button at the bottom of the page. To close the selection, hit "Close".

Figure 5

- Once the Close button is hit, only then the entries from the New Items pop up grid are entered in the main New Items grid.
- The items to be added in the requisition can be filtered by:

a. Supplier: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.

b. Manufacturer: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.

c. Category: This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.

d. Cost: This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.

e. Stock Status: This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.

f. Item Type: This filter allows filtering the type of item to be entered in the quick list. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.

- Once the Close button is hit, only then the entries from the pop up grid are entered in the main New Items grid. The grid can also be closed by click on ⊗ icon.
  Note: Quick list provides an option to preserve the values entered next time user visits the page, by checking the check box provided at end of new quick list page. REFER Figure 3

- When the items are added to the requisition list, the screen also displays the number of items in the requisition list, along with total price of all the items.

> # of Items requisitioned : 5 | Total Cost : $ 130.10

c. Edit an existing requisition:

To edit an existing requisition in any module, click on the requisition number and new screen in accordance to the selected tab appears on screen. To edit any requisition the user must have the required authorization.

d. Delete a requisition:

A requisition can be deleted, by selecting the record and then click on Delete icon 🗑 or press Delete key on your keyboard. The user may also delete the selected or multiple record s. A pop up verifies your selection and then deletes the selected records.
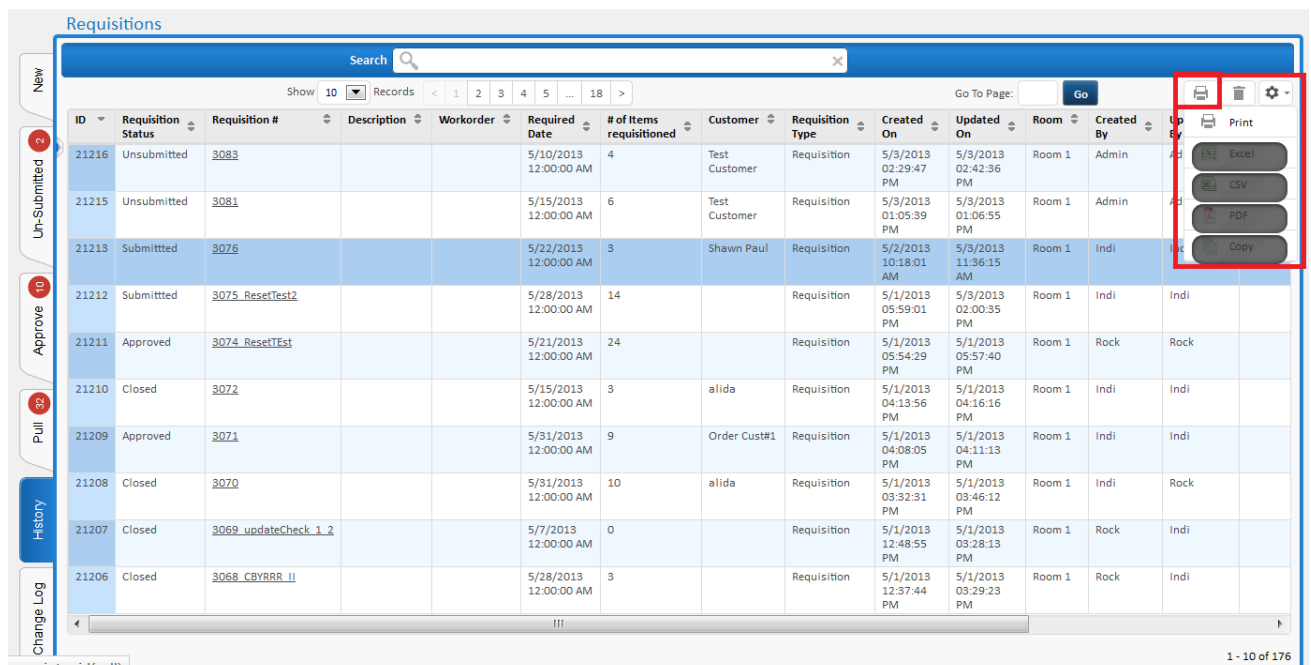
ID	Requisition Status	Requisition #	Description	Workorder	Required Date	# of Items requisitioned	Customer	Requisition Type	Created On	Updated On	Room	Created By	Updated By	UDF1
21216	Unsubmitted	3083			5/10/2013 12:00:00 AM	4	Test Customer	Requisition	5/3/2013 02:29:47 PM	5/3/2013 02:42:36 PM	Room 1	Admin	Admin	
21215	Unsubmitted	3081			5/15/2013 12:00:00 AM	6	Test Customer	Requisition	5/3/2013 01:05:39 PM	5/3/2013 01:06:55 PM	Room 1	Admin	Admin	156
21213	Submittted	3076			5/22/2013 12:00:00 AM	3	Shawn Paul	Requisition	5/2/2013 10:18:01 AM	5/3/2013 11:36:15 AM	Room 1	Indi	Indi	
21212	Submittted	3075_ResetTest2			5/28/2013 12:00:00 AM	14		Requisition	5/1/2013 05:59:01 PM	5/3/2013 02:00:35 PM	Room 1	Indi	Indi	
21211	Approved	3074_ResetTEst			5/21/2013 12:00:00 AM	24		Requisition	5/1/2013 05:54:29 PM	5/1/2013 05:57:40 PM	Room 1	Rock	Rock	
21210	Closed	3072			5/15/2013 12:00:00 AM	3	alida	Requisition	5/1/2013 04:13:56 PM	5/1/2013 04:16:16 PM	Room 1	Indi	Indi	
21209	Approved	3071			5/31/2013 12:00:00 AM	9	Order Cust#1	Requisition	5/1/2013 04:08:05 PM	5/1/2013 04:11:13 PM	Room 1	Indi	Indi	
21208	Closed	3070			5/31/2013 12:00:00 AM	10	alida	Requisition	5/1/2013 03:32:31 PM	5/1/2013 03:46:12 PM	Room 1	Indi	Rock	
21207	Closed	3069_updateCheck_1_2			5/7/2013 12:00:00 AM	0		Requisition	5/1/2013 12:48:55 PM	5/1/2013 03:28:13 PM	Room 1	Rock	Indi	
21206	Closed	3068_CBYRRR_II			5/28/2013 12:00:00 AM	3		Requisition	5/1/2013 12:37:44 PM	5/1/2013 03:29:23 PM	Room 1	Rock	Indi	

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Figure 6

e. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

a) Print: It prints the selected page.
b) Excel: It converts the page to excel sheet.
c) CSV: It converts the page to CSV sheet.
d) PDF: It converts the page to PDF document.
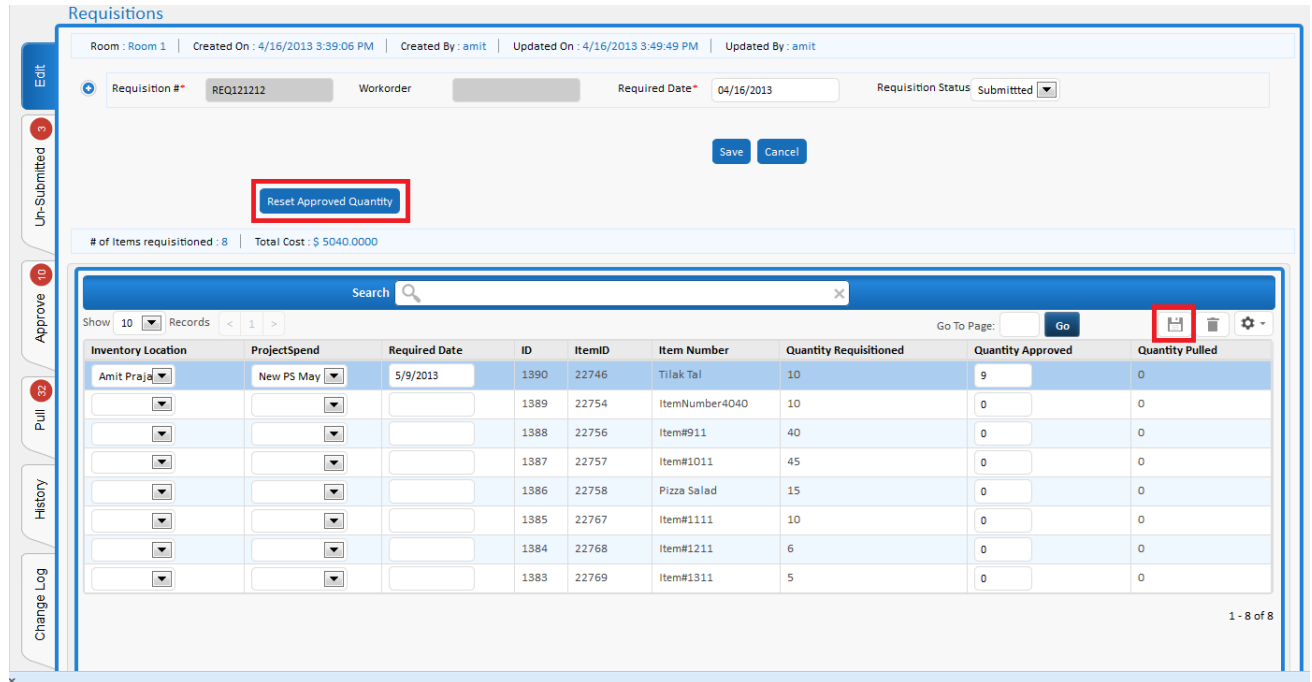e) Copy: It copies the page to Clipboard.

Figure 7

f. Approve a Requisition:

User with required rights may approve the requisition. Click on requisition number to be approved in the Approve tab, and the following screen will appear:

Figure 8

- Enter the particulars and fill in the quantity to be approved in Quantity Approved text box.
- Change the status to "Approved" in the "Requisition Status" drop down.
- Click on "Save" icon or SAVE button to approve the requisition. Thus the requisition gets Approved.

Note: To make all the quantities in Quantity approved textboxes "0" or reset them, click on "Reset Approved Quantity" button.

g. Pull item from approved requisition:

After the item has been approved to be pulled, user can click on required Requisition number in the Pulls tab. The following screen is displayed:

- Enter the quantity to be pulled in the "Quantity to Pull" text box and other particulars. Click "Pull" button in front of the record.
- Click on "Save" icon or SAVE button. Thus the item gets pulled and the changes are reflected on screen.
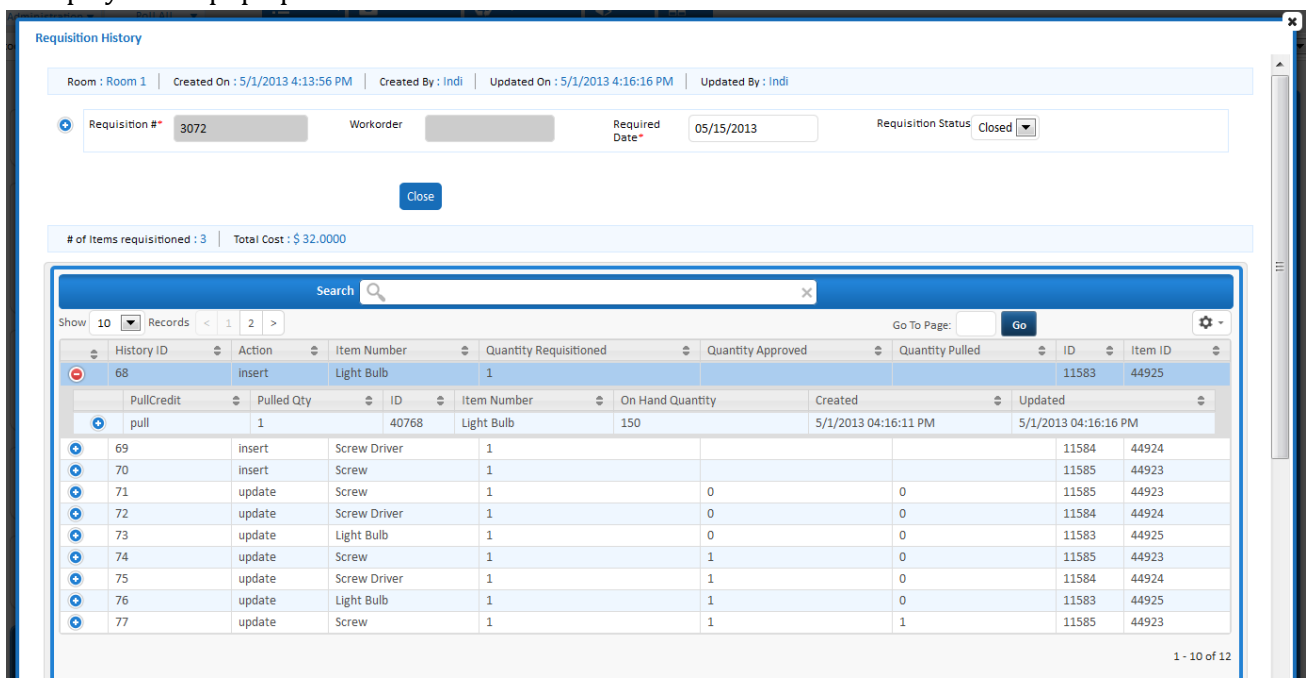
h. View change log for a Requisition:

To view the updated history of a requisition, select the requisition and click on change log tab. It displays when the requisition was created and the number of times it was updated.

Figure 10

To view the log for individual items of the requisition, click on requisition number and items change log is displayed in a pop up.

Figure 11

i. Search the Requisition for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

i. **Main Search:** To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

Figure 12

ii. **Narrow Search by:** As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.
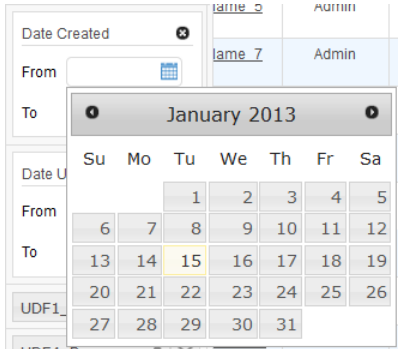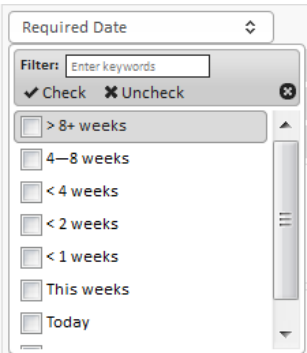
- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
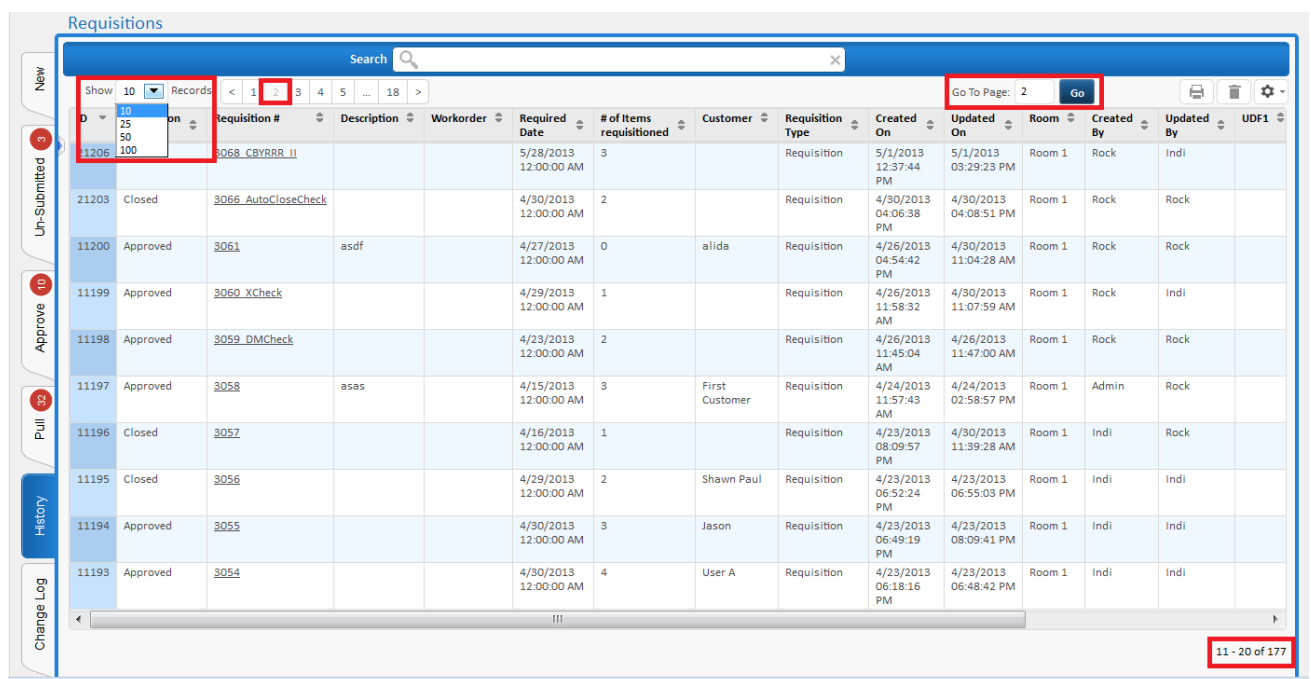- The following screen appears:

Figure 13

Field	Description
User Created by	It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears: User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.
User Updated by	It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears: Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made. **Note:** To cancel the selections made at any point of time, click.
Date Created and Date Updated	They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period. Note: To clear the entire selection, click

Required Date	It is used to filter the module for requisition palced in certain time frame. Check or uncheck the filter user wishes to place on the entites of the module.

Note: At point of time only one of the either searches will work.

j. View records and go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click "Go".
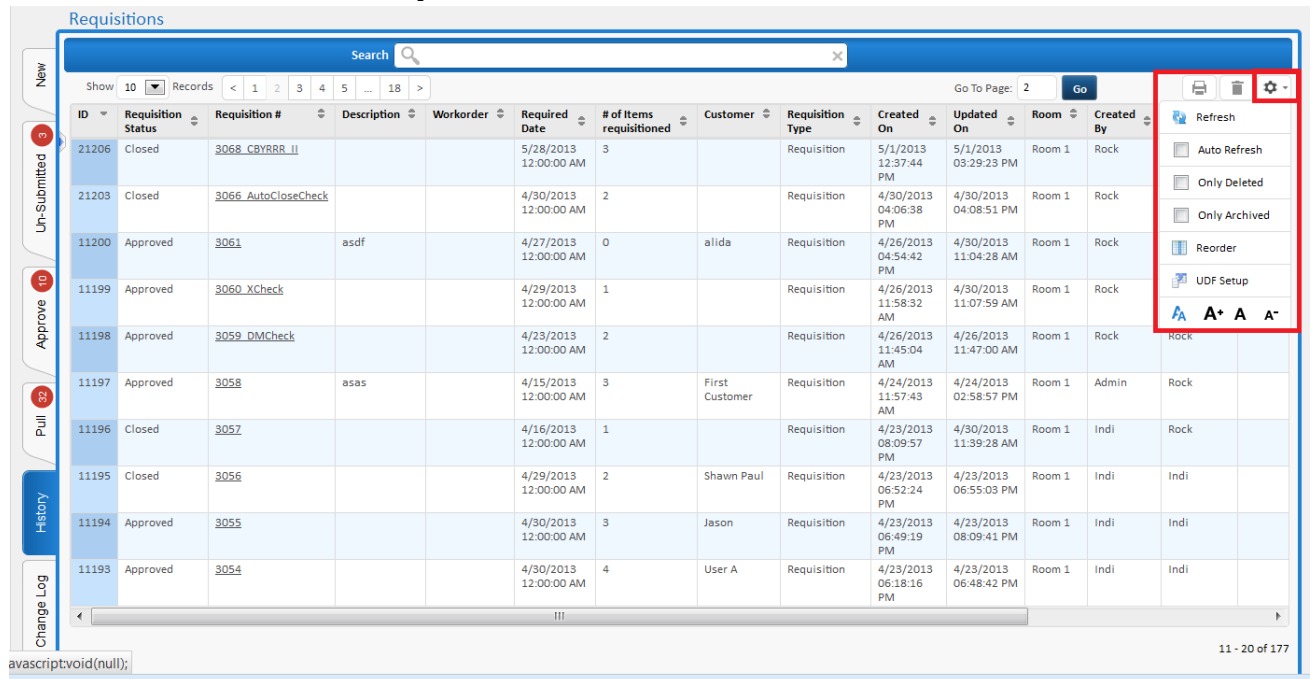

Figure 14

k. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

a) Refresh: This option refreshes the module and displays the latest changes implemented.

b) Auto Refresh: This option automatically refreshes the screen in specified time.

c) Only Deleted: This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.

d) Only Archived: This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.

e) Reorder: This option enables user to reorder the columns of the module.
- User can also select which field to appear on screen and which remains to be hidden.
- Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
- User may also drag and drop fields to be arranged in requisition of choice.
- After the selection is completed, click "Reorder".

l. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

1) Resizing of columns
2) Re-requisitioning of columns using drag & drop of column header
3) Single column and multi column sorting (using shift key)
4) In-line editing

Multi selection of rows by clicking each row