ePro Buyers Manual

Version 17.03.1.0

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Contact Us
Visit us at www.zycus.com. For queries, contact customer support:

E-mail ID: tech-support@zycus.com

US Toll free: +1-800-409-3507 | +1-866-363-6625

International Toll free: + 800-9928-7111 | + 800-9928-7000

TABLE OF CONTENTS

Provide Feedback

Provide Feedback

Chapter 1: About this Guide

1.1 Purpose

This user guide enables the users of eProc to get acquainted with the application and use it effectively for the following:

- Creating a Purchase Order (PO)
- Converting Requisitions to PO
- Different actions related to a PO: E-mailing PO, closing PO etc.
- Amending a PO
- Onboarding a Supplier onto eProc
- Accessing Pre-packed Reports
- Creating & Editing existing Reports

1.2 Audience Profile

The intended audiences for this guide are the people who are involved in the procurement process and place orders with suppliers. Their goal is to plan, execute, and finalize purchasing and procurement strategies for spend across the organization.

The responsibilities of a Buyer include:

1. Direct and manage the sourcing strategies from beginning to end. This includes PO approval & generation in the source system.

2. Report supplier performance to Sourcing department.

3. Sets cost-center wise limits for approval at buyer and manager level. This is done while keeping the budget in mind.

4. Receives invoices from suppliers, verifies them and enters in the source system. Also needs to handle advance shipping notices (ASNs) that inform him about goods dispatched and to be received.

This user guide has been divided into the following chapters:

- **Chapter 1: About this Guide** - This chapter gives a description about the user guide and how it is organized.
- **Chapter 2: Welcome to eProc** - This chapter gives an overview of the eProc application. It also discusses the key features and benefits of eProc.
- **Chapter 3: Accessing eProc** - This chapter describes how to log on to the application.
- **Chapter 4: Managing your Profile** - This chapter describes how to manage your profile, set preferences, and change password.
- **Chapter 5: Purchase Request & Purchase Order** - This chapter describes how a purchase request is converted to a Purchase Order (PO).
- **Chapter 6: Creating Purchase Orders (PO) Manually** - This chapter describes how to manually create a PO in a simple wizard.
- **Chapter 7: Tracking Purchase Orders (PO)** - This chapter describes how to manage the POs.
- **Chapter 8: Supplier On-boarding** - This chapter describes the procedure to on-board a supplier
- **Chapter 9: Reports** - This chapter explains the procedure of viewing or generating a report.

1.3 Typographical Conventions

Typefaces: The following typefaces are used throughout in this user guide:

Typeface	Description
Italic	*This typeface is used to represent cross-references within the user guide. It also represents important and useful information in the form of Notes, Tips, and Warnings.*
Bold	**This typeface is used to represent screen elements of the eProc application.**
CAPS	This typeface is used to represent the keys on the keyboard.
Blue text	This indicates a hyperlink.

Chapter 2: Welcome to eProc

2.1 Introduction

Zycus eProc is an easy-to-use, flexible, and highly configurable tool that is used to request, purchase, and issue payment for goods in an effort to reduce supplier's effort and drive continuous improvement.

The eProc application helps you manage supplier orders efficiently to increase competitiveness by reducing turnaround time and inventory levels. Additionally, the application enables suppliers to place an order for the products they are looking for but are not available currently in the catalog (free text items) which in turn helps organizations and suppliers take better decisions.

2.2 Overview of eProc

Zycus E-Procurement application (eProc) is a web 2.0 based procure to pay (P2P) solution that controls the maverick spending by ensuring proper approvals for organization wide spend, realizes tactical savings by automating and standardizing procurement process, and increases compliance to contracted suppliers and visibility of contracted vendors across the organization. It automates the entire process from requesting items to order to payment and provides innovative ways to gather supplier content /catalogs to automate and reduce time and effort for supplier content management.

Zycus eProc provides an intuitive Amazon-like interface for requisitioning, thereby increasing adoption. Unlike other Vendors, application has automated classification of catalog content, integrated search capabilities to search across local catalogs and punch-out catalogs, and guided procurement to easily navigate buyers through buying process for category. It is completely integrated with other spend management solutions like sourcing, contract management to enable a stronger spend compliance process and supports formats like cXML, OCI, Oracle catalog format.

2.3 Key Benefits

These are some of the key benefits that your organization can gain through eProc:

- Comprehensive procure-to-pay solution
- Quick-setup and Easy-to-use
- Strong approval workflow
- Builds a supplier portal
- Leverages existing products in SRM Suite
- APIs for integration with customer's source systems

Provide Feedback

Chapter 3: Accessing eProc

3.1 Introduction

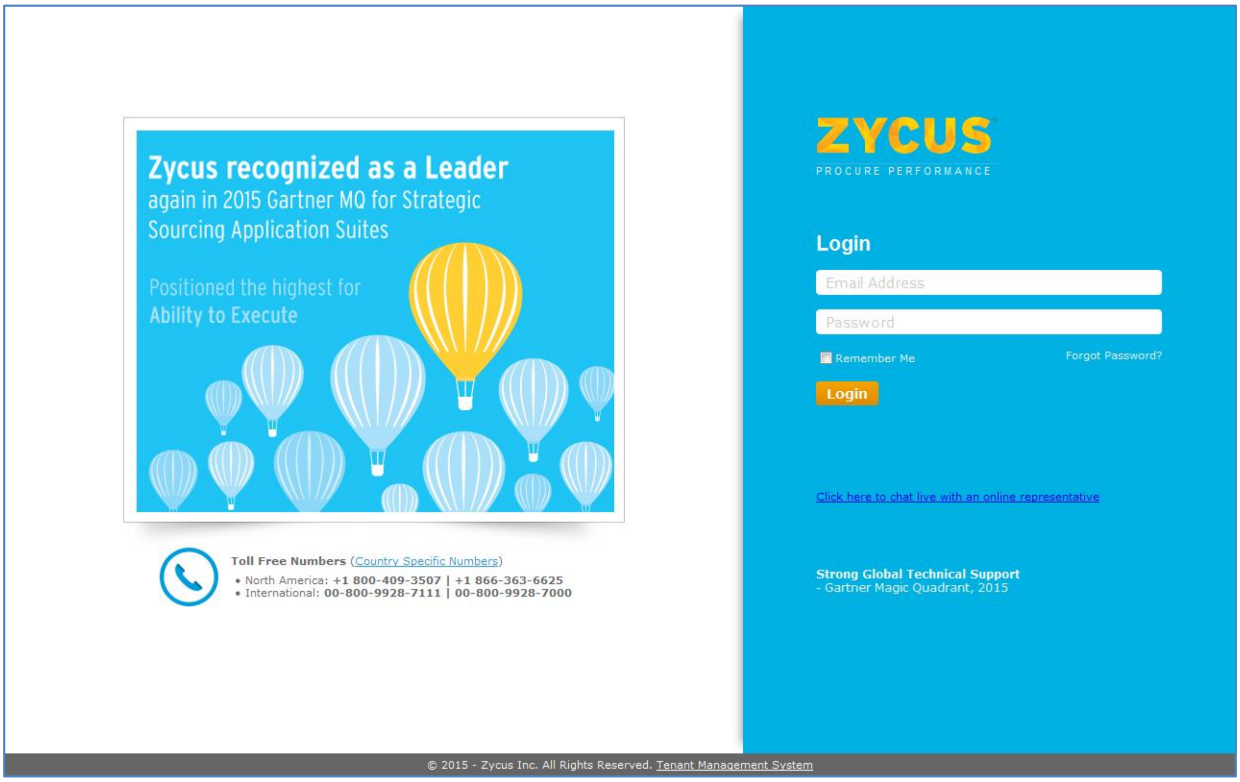
eProc is available in Software as a Service (SaaS) mode over the internet which makes it easier for the user to access it through your organizations intranet.

3.2 Accessing eProc

To access eProc:

1. Open the internet explorer, type the URL in the Address bar box, and click **Go** or press ENTER. The Login page opens.

Note: *The URL is specific to your company name and is provided by Zycus.*



Note: *All the Zycus Suite applications can now be accessed using single login credentials.*

2. Type your email id and password in the **Email Address** and **Password** fields respectively and click **Sign In** or press the ENTER key. The Product Selection page is displayed.

3. Select **eProc** to start using the application.

Note: *If you do not see the Product Selection page, but instead see the Login page again, please verify the email id and password you typed and try again.*

Note: *Email Address and Password fields are case sensitive. Also, please contact your organization"s IT team to get details of the URL, email id, and password for eProc.*

3.3 Logging Out

To logout from eProc:

- Click the **Logout** link located at the upper-right corner of the window. The **Login** page is displayed.

Note: *eProc has a configurable time out period. You are automatically logged out from eProc if you do not use eProc for the configured time out period (For example, 30 minutes).*

Note: *Closing the browser window is not an appropriate method to exit from eProc.*

Chapter 4: Managing your Profile

4.1 Introduction

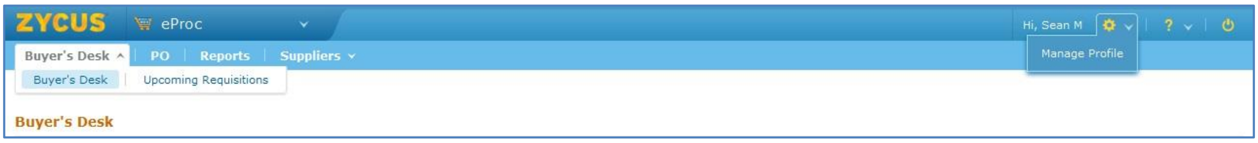
eProc enables users to manage their profile, set their preferences, and change password.

4.2 Setting your preferences

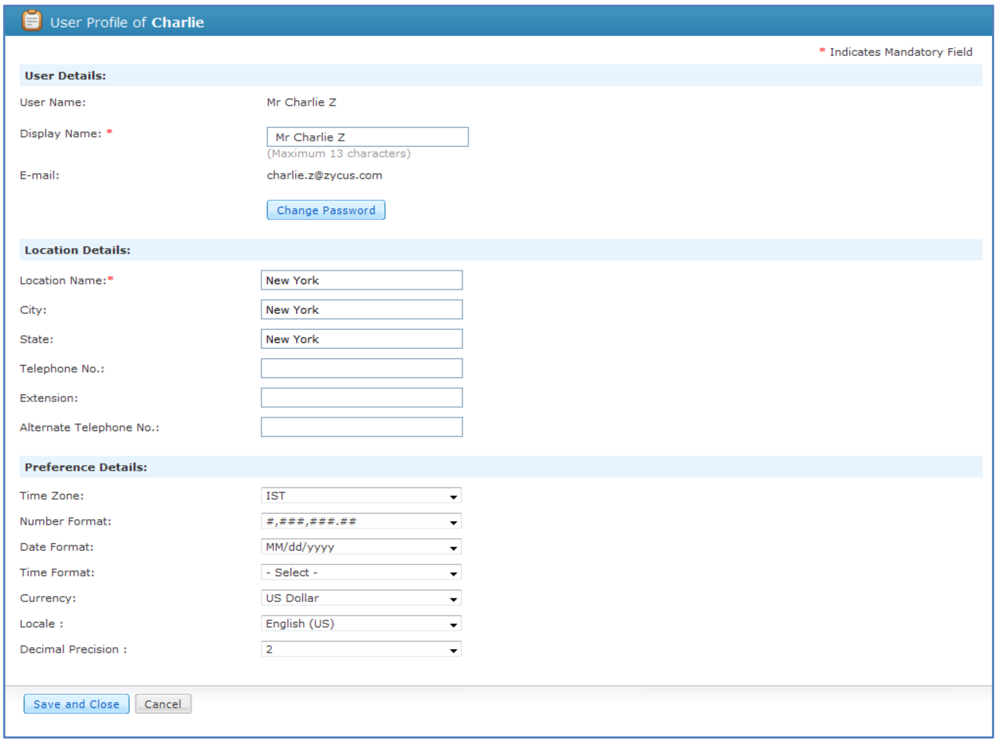
The **User Profile** page allows you to modify, add, and update personal information.

To update personal details:

1. Log on to the eProc application. The following page is displayed.



2. On the top right corner, click on  settings link and select **Manage Profile**. The **User Profile** page is displayed.



Provide Feedback

Following are the description of the various fields on the User Profile page:

Fields	Description
User Details	
User Name	Displays the name of the logged in user. **(For Viewing Only)**
Display Name	Enter the user name to be displayed in the application. **(Mandatory)**
E-mail	Displays the email-id of the logged in user. **(For Viewing Only)**
Change Password	Click on this button to change the password. For more details see "**Changing Password**"
Location Details	
Location Name	Specify/Displays the location of the logged in user. **(Mandatory)**
City	Specify/Displays the city of the logged in user.
State	Specify/Displays the state of the logged in user.
Telephone Number	Specify/Displays the telephone number of the logged in user.
Extension	Specify/Displays the extension of the logged in user.
Alternate Telephone No	Specify/Displays the alternate telephone no of the logged in user.
Preference Details	
Time Zone	Select the applicable time zone from the drop down menu.
Number Format	Select the applicable number format from the following options: • US Format: (#,###,###.##) • European Format: (#.###.###,##)
Date Format	Select the applicable date format from the following options: • yyyy/MM/dd • dd/MM/yy • MM/dd/yy
Time Format	Select the desired time format from the following options: • 12 Horus • 24 Hours
Currency	Select the applicable currency format from the drop down menu.
Locale	Select the applicable locale format from the drop down menu.
Decimal Precision	Select the applicable decimal precision from the drop down menu.

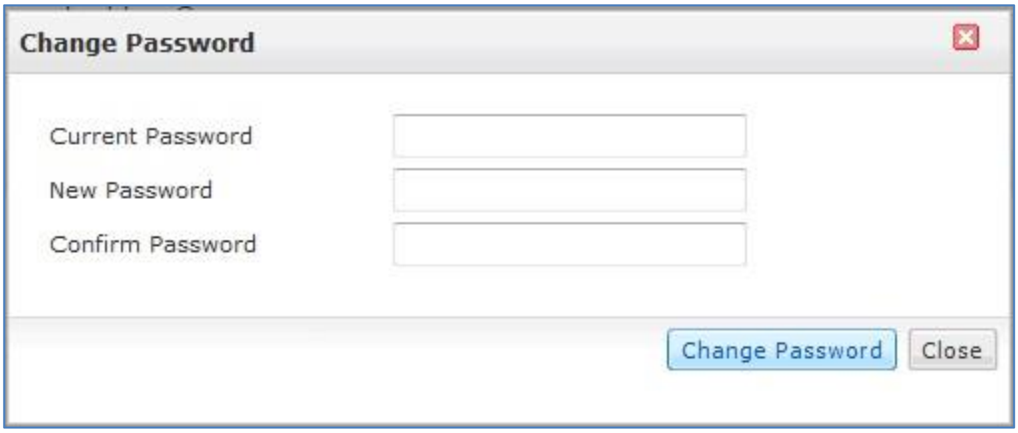
4.3 Changing Password

eProc provides you with a feature to change your password in the **User Profile** page provided within the application under **Settings**.

Note: *It is recommended to change your password when you login for the first time. Password must contain minimum eight characters.*

To change your password:

1. On the **User Profile** page, click **Change Password**. The **Change Password** page is displayed.



2. Type your current password in the **Current Password** field.

3. Type your new password in the **New Password** field.

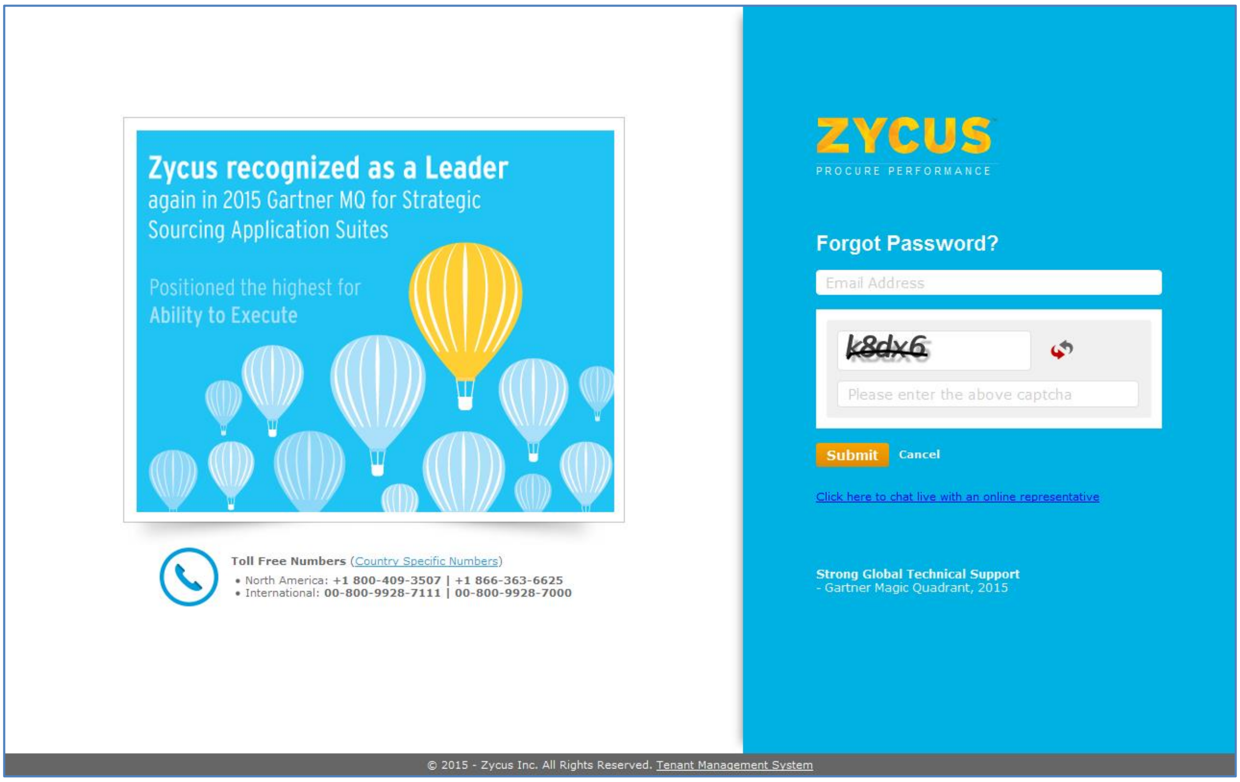
4. Type your new password again in the **Confirm Password** field for confirmation.

5. Click **Change Password**. The password gets saved and the following message is displayed.

4.4 Recovering Password

To recover your password:

1. Click on the **Forgot Password?** link in the login page. The Forgot Password page is displayed.



2. Type your official email address in the **Email Address** field.

3. Enter the code, displayed in the **Enter the above code** field and click **Submit**. An email is sent to your email account with your login id and password.

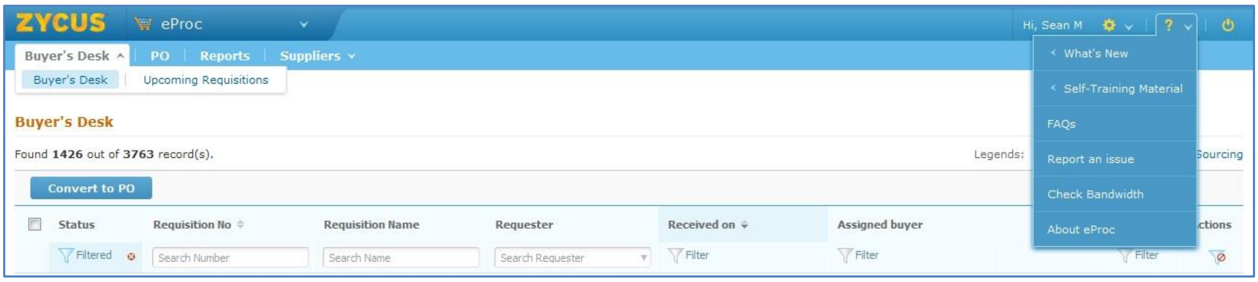
Note: *Click* *to refresh the code.*

4.5 Need More Help

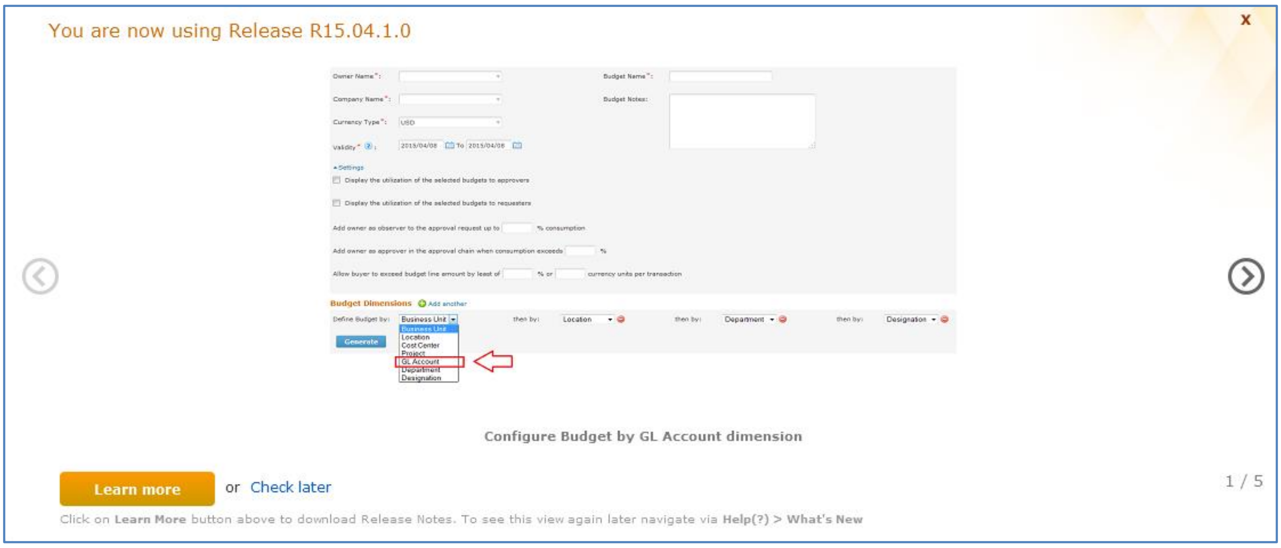
This feature makes it easier for you to understand, get self-trained to use eProc with ease. The **Help** options provides you with access to the user manuals, FAQs, Online Videos for suppliers which have been created to give you step by step explanation of different event level activities. In case, you have problems with the application you can chat with customer support and have your problems solved.

To use the help option:

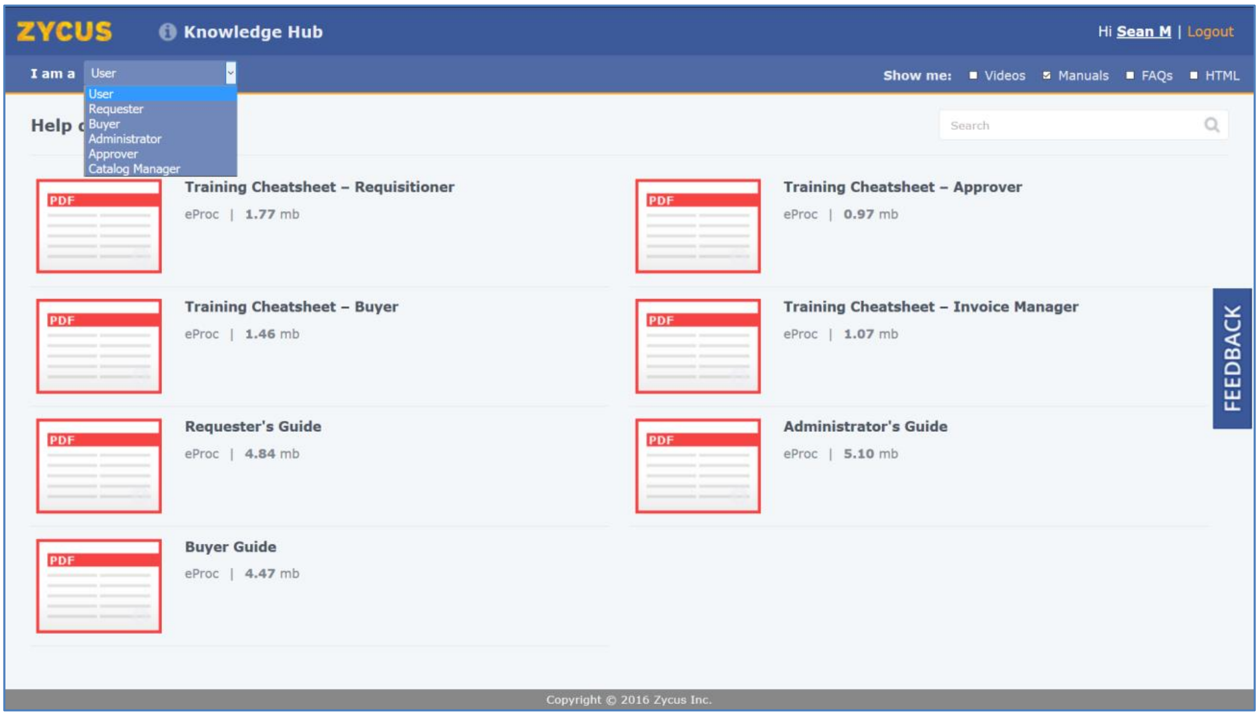
1. On the top right corner of the page, click o **Help** link.



Option	Description
What's New	Gives you access to Release Notes & Release Specific Videos for the latest release.
Self-Training Material	Gives you access to Help Videos, Online Help & User Manuals for eProc.
FAQs	Gives you detailed information of all the important features
Manuals	Gives you step-by-step information to help you carry out various functions. This section provides customer specific help documents Zycus Knowledge Hub of eProc as shown in the following figure.
Online Videos	Provides a list of videos depicting the functionality of the various features
Report an issue	Gives users an option to contact Zycus Technical Support team
Contact Us	Gives contact details
About	Gives all the version details of eProc



Click and arrow to slide through release notes or click **Learn More** to download the Release Notes in PDF format.



Feedback directs to a link to provide feedback for **Knowledge Hub**.

Chapter 5: Purchase Request & Purchase Order

5.1 Introduction

A purchase order (PO) is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer. Sending a PO to a supplier constitutes a legal offer to buy products or services.

POs allow buyers to clearly and explicitly communicate their intentions to sellers, and sellers are protected in case of a buyer's refusal to pay for goods or services. POs also help a purchasing agent manage incoming orders and pending orders. POs also are an economical choice for a business because they streamline the purchasing process to a standard procedure.

5.2 Touchless PO Generation Process

After a requisition is approved and the auto-generation setting is set ON in the system, a requisition is automatically converted into a PO and PO is released to supplier.

Note: *An organization can configure POs to be automatically generated when a requisition is approved, and define when they are released to the supplier. Please contact your administrator for more details.*

Note: *POs will be generated automatically only if requisition contains catalog or punchout items or if it is linked to a blanket purchase order. If a requisition contains free text items then it will always go for buyer's approval and only buyer will be able to generate PO against those requisitions.*

Note: *POs ordered will be released to suppliers based on the release date settings. PO can be released immediately or after specified timeline.*

Provide Feedback

5.3 Understanding Buyer’s Desk Functionality

Buyer’s Desk is split into two sub sections: Requisitions and Items.

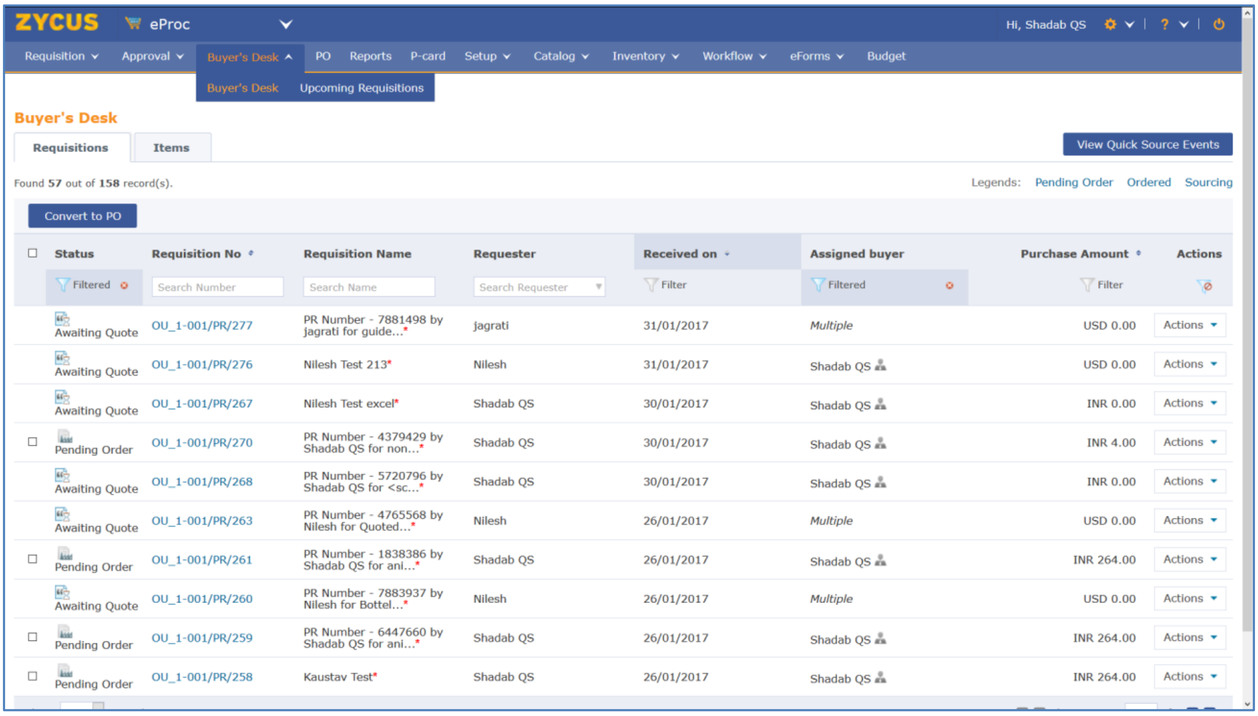
5.4 Buyer’s Desk: Requisition

Every requisition that contains free text items is moved to Buyer’s Desk for PO generation. In the Buyer’ desk, the buyer decides the supplier from whom the item is to be purchased and can also modify the price and quantity of the requested items but up to a certain tolerance limit.

- Requisitions containing catalog punchout items will also be moved to **Buyer’s desk** if **Touchless PO generation** setting is **OFF**.
- Approved requisitions that are waiting for buyer’s action are present in **Pending** status in **Buyer’s Desk** tab

When an assigned buyer opens a requisition from buyer's desk, by default, only those items will be shown by eProc for which the buyer is the category manager and locations of line items are assigned under his scope (not the requester's scope).

Note: *An organization can configure POs to be automatically generated when a requisition is approved, and define when they are released to the supplier. Please contact your administrator for more details.*



The following table describes the Requisition status under the **Buyer’s Desk** tab in detail:

Provide Feedback

Status	Description
Draft	This status describes that the requisition is in draft stage
Ready for approval	This status describes that the approvers are to be added in the workflow
In Approval	This status describes that the requisition is sent for approval
With Buyer	This status describes that the requisition is with the buyer
Returned For Amendment	This status describes that the requisition has been returned for further amendments
Scheduled	This status describes that the requisition is scheduled state
Rejected	This status describes that the requisition is rejected by the requisition approver
Closed	This status describes that the requisition is closed
Cancelled	This status describes that the requisition is cancelled
Returned with Quote	This status describes that requisition is returned with quote
Sent for Quote	This status describes that requisition is sent for quote
Released	
Partially Ordered	This status describes that requisition is partially ordered
Not Received	This status describes that items are not yet received against this purchase order
Partially Received	This status describes that requisition is partially received
Fully Received	This status describes that requisition is fully received

Note: *The assigned buyer should be copied as the buyer on auto generated PO's.*

Note: *Buyer will be able to edit the price for a free text item without any tolerance checks if the sourcing status of the free-text item is Need a quote.*

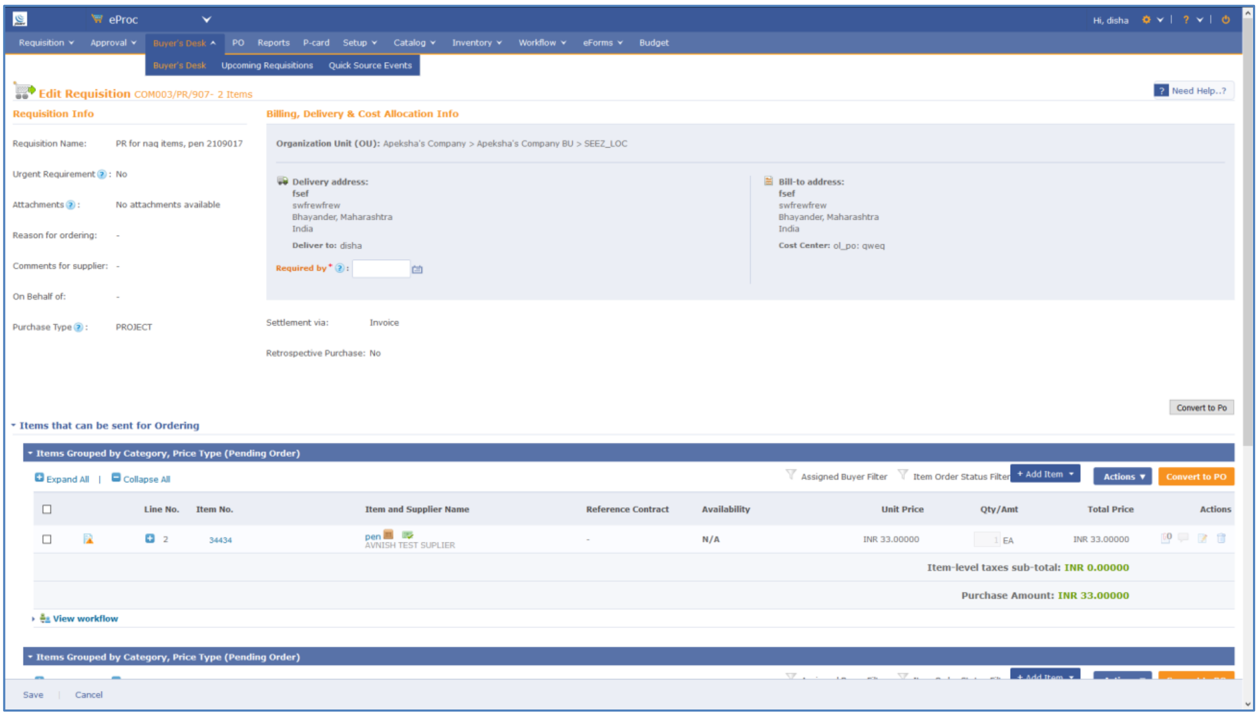
Note: *Depending upon the activity assigned to the user in TMS, the user will be able to:*

1. *View and edit only those requisitions for which the logged in user is the assigned buyer.*
2. *View and edit only those requisitions for which the logged in user is the assigned buyer and also view other users requisitions who are within the users scope.*
3. *Both of above and is also able to edit other requisitions too.*

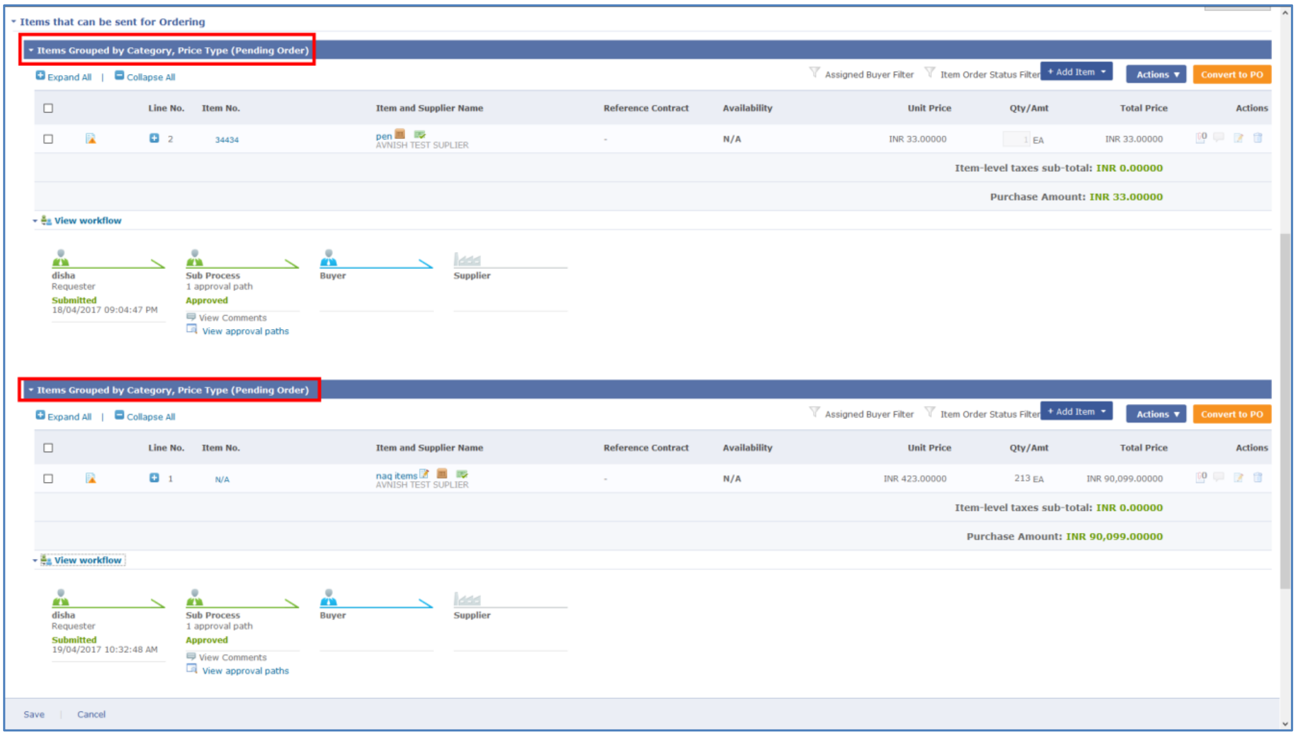
5.5 Viewing a Requisition

1. To view a requisition from Buyer's desk, click the **Requisition Number** hyperlink. You will be navigated to the following page:

Provide Feedback



2. The items in the item table will be split and grouped by the type. For example: grouped by category and grouped by price type as shown in the image below.



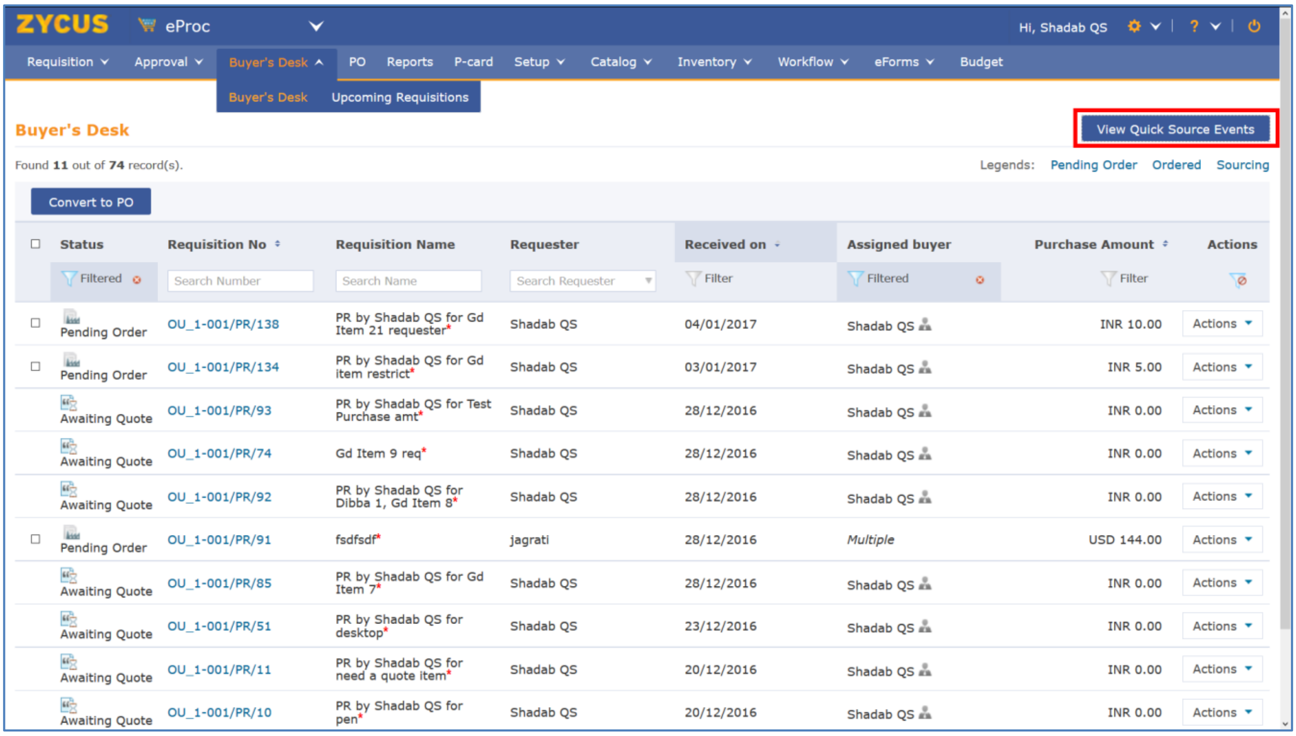
3. Since the items are grouped by category and price type, if required, you can choose to approve only one group of items and return the other group to the requisitioner for review.

5.6 Viewing Quick Sourcing Events

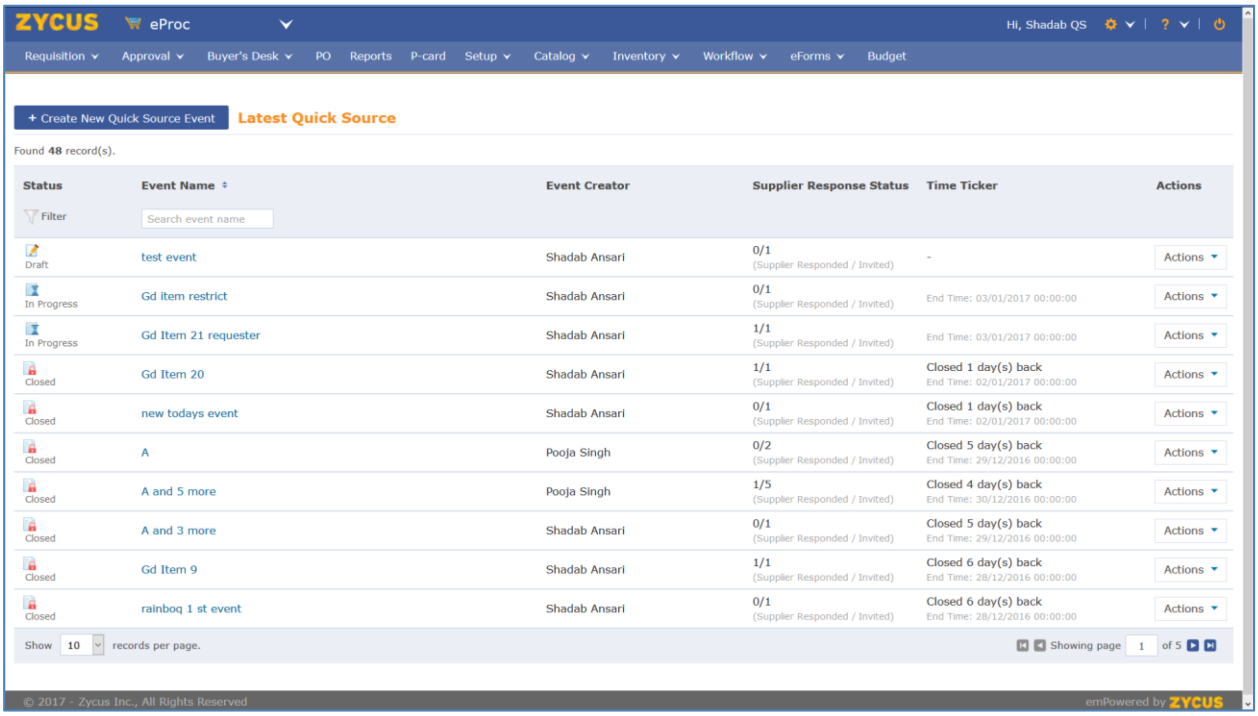
As a Buyer, you will be able to view all the quick sourcing events created.

To **View Quick Sourcing Events**, follow the given steps:

1. On the **Buyer's Desk** page, click **View Quick Sourcing Events** as shown below:



2. You will land on the following page:



3. All the quick sourcing events you have created will be listed on this page.

Provide Feedback

5.6.1 Understanding Quick Sourcing Event listing page

2. The sourcing events created for guided procurements items will be tracked through this page. The following table describes the Sourcing status in detail:

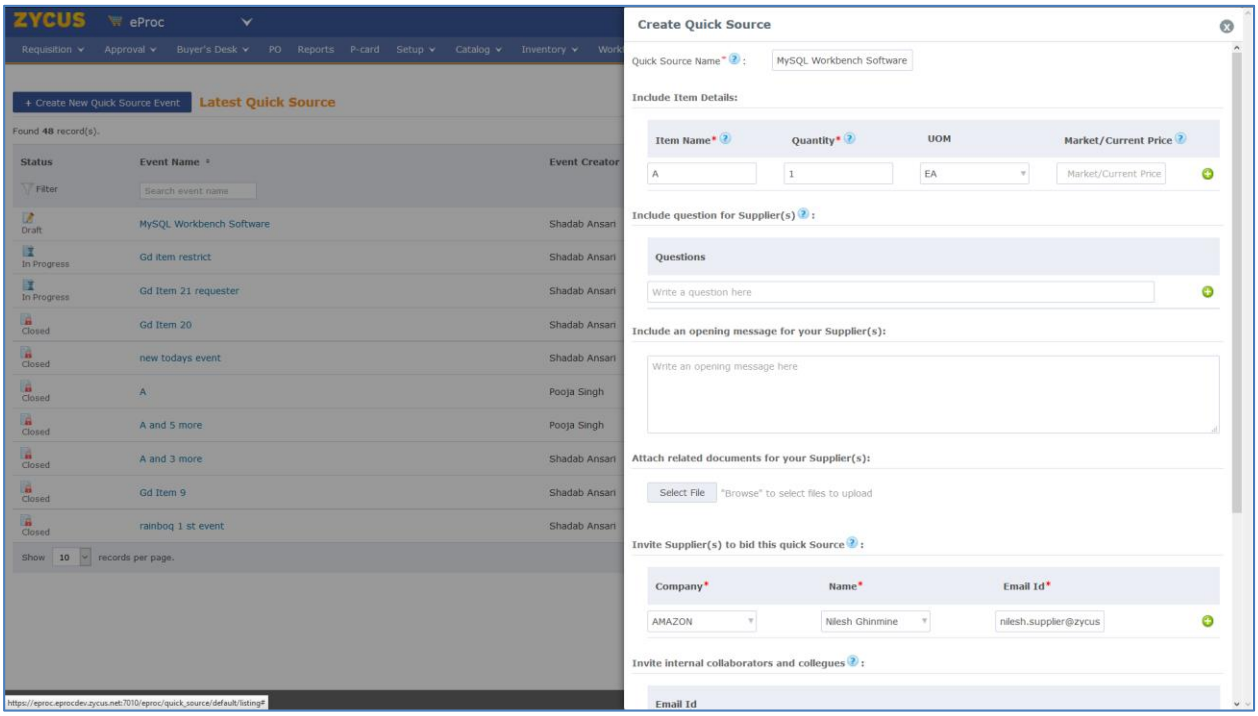
Status	Description
Draft	The event is currently in draft stage and can be edited before submitting.
In Progress	The sourcing event is in progress.
Awarded	The sourcing event is complete and the supplier has been awarded.
Closed	The sourcing event is closed and no actions can be taken on it. You can only view the event details and supplier response (if any).

Columns	Description
Status	Displays the current status of the event.
Event Name	Displays the name of the event.
Event Creator	Displays the name of the eProc user who created the event.
Supplier Response Status	Displays the status on the No. of Suppliers invited v/s the No. of Suppliers responded.
Time Ticker	Displays the time and date by which the event will close.
Actions	• For events in Draft stage: Edit | Delete • For events in progress: Add Supplier | Add Collaborator | Modify Closure Date | View Responses • For events in closed stage: View Responses • For events which are awarded: View Responses

5.6.1.1 Events in draft stage

1. For events which are in draft stage, you can edit or delete the event. For a given event, go to the **Actions** drop down menu and select **Edit**.
2. A sourcing event side by side panel will open as shown below:

Provide Feedback



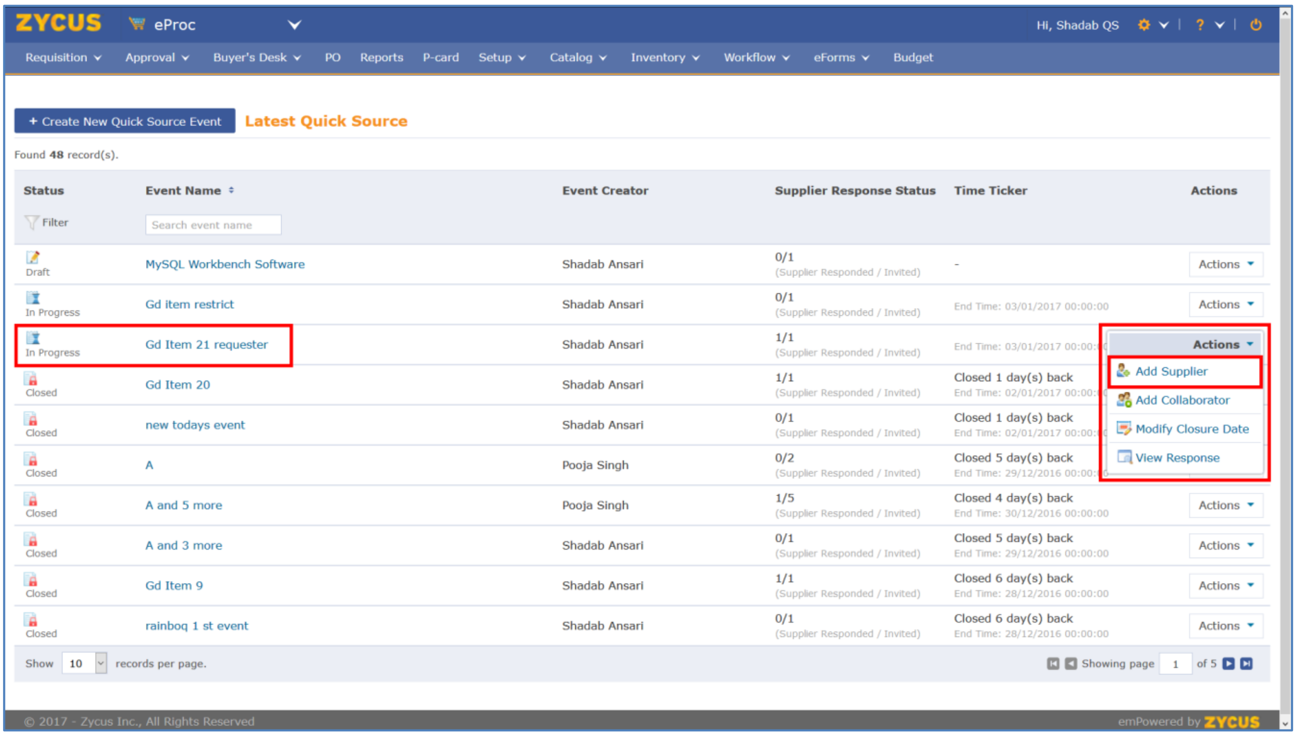
3. Make changes to the event as required. You can publish the event by selecting **Create**. Or you can again **save it as draft**.

5.6.1.2 Events in progress

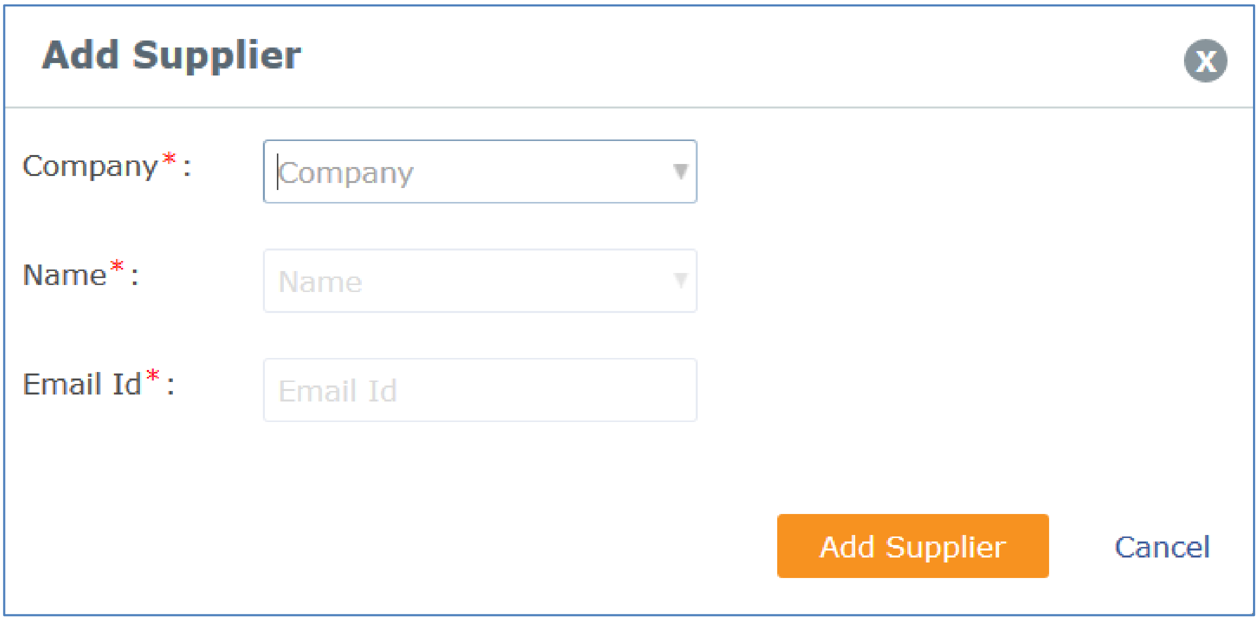
For events which are in progress, you can add suppliers, collaborators, modify the closure date or view supplier responses.

5.6.1.2.1 Add Supplier

1. For a given event, under the **Actions** drop down menu, select **Add Supplier**.



1. **Add Supplier** popup will appear as shown below. Enter the company name, supplier name and email ID.

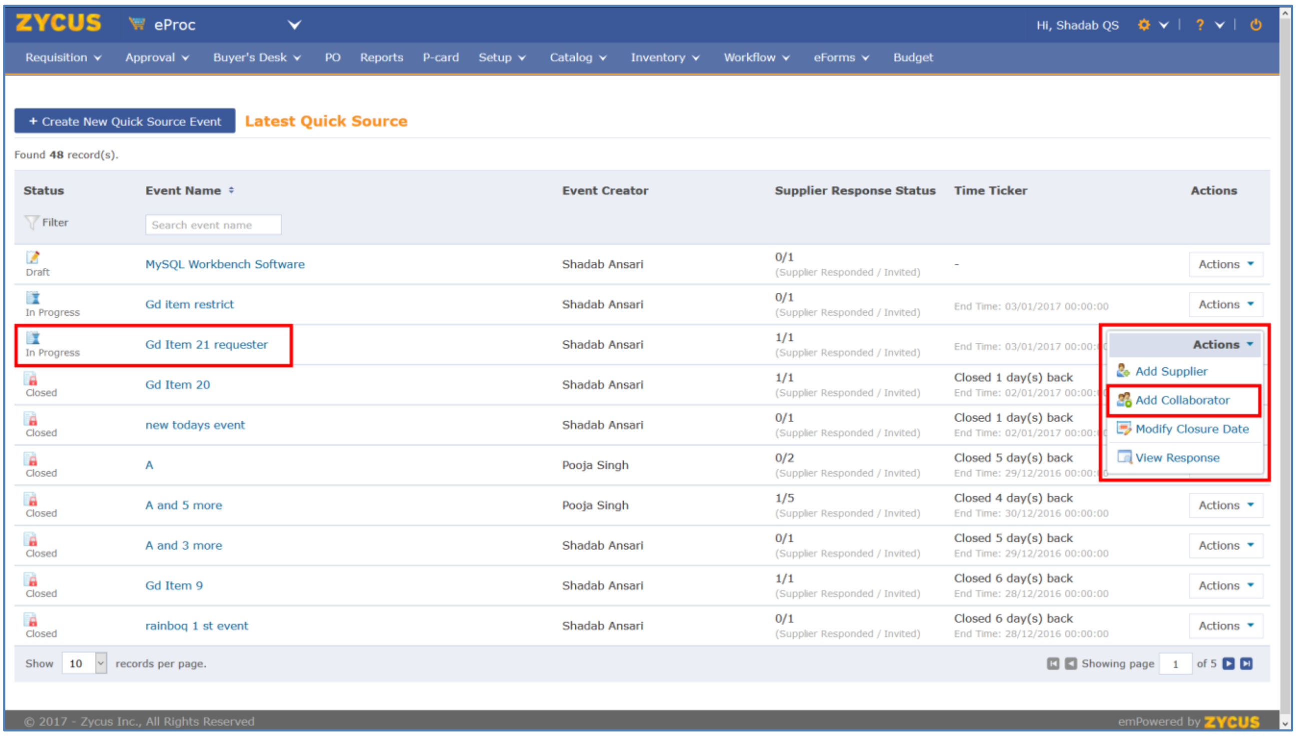


2. Once you enter all the information, click **Add Supplier**.

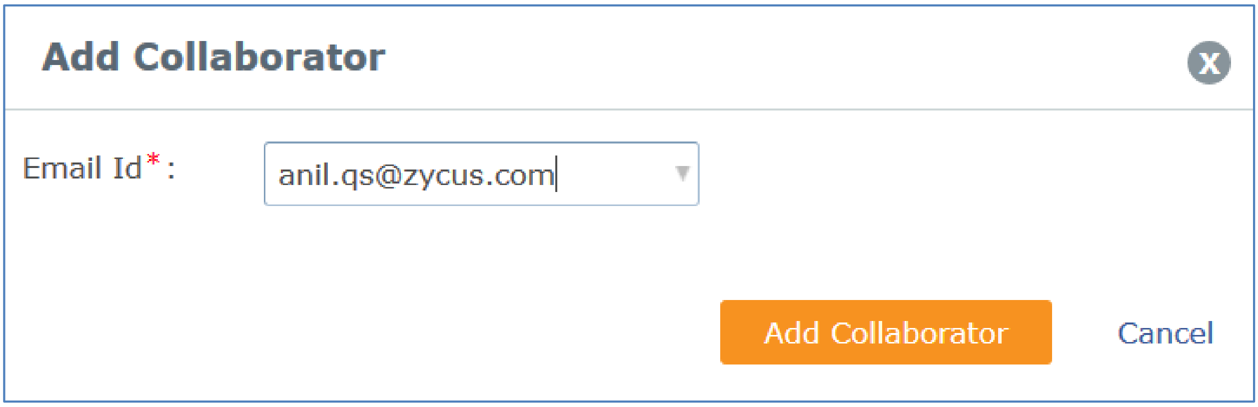
5.6.1.2.2 Add Collaborator

1. For a given event, under the **Actions** drop down menu, select **Add Collaborator**.

Provide Feedback



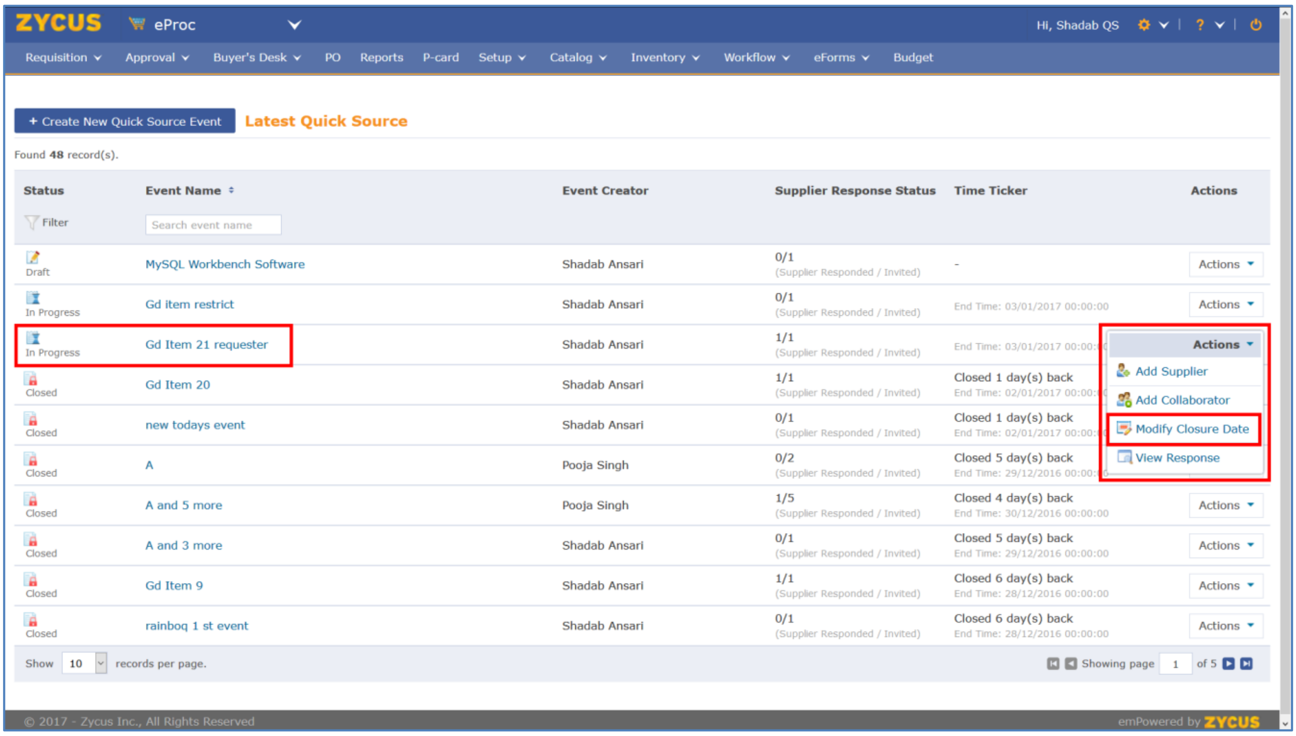
3. **Add Collaborator** popup will appear as shown below. Enter the eProc users email ID and click **Add Collaborator**.



5.6.1.2.3 Modify Closure Date

1. For a given event, under the **Actions** drop down menu, select **Modify Closure Date**.

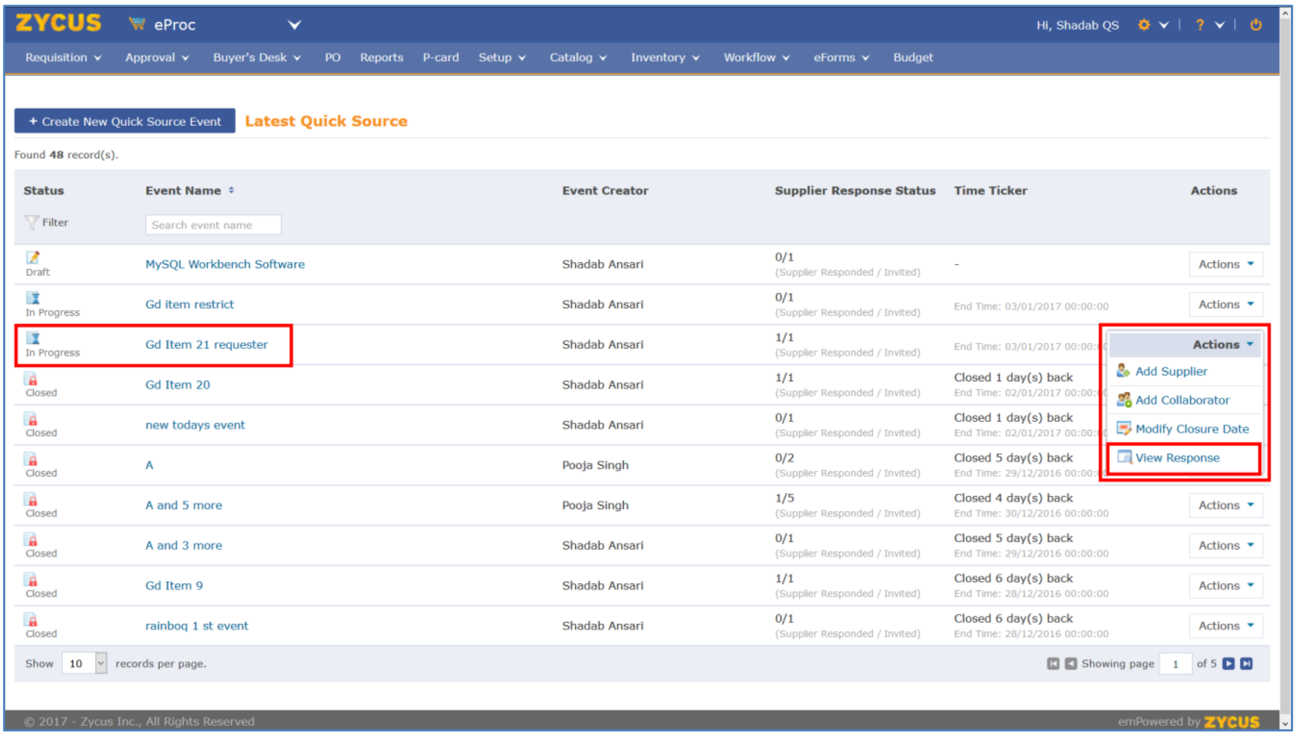
Provide Feedback



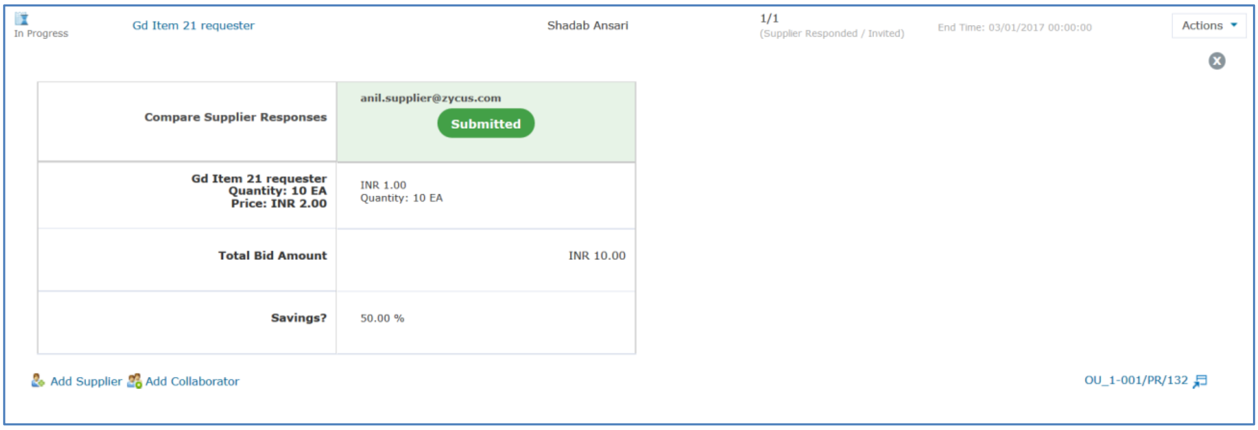
2. **Modify Closure Date** popup will appear as shown below. Select a new date by which you want the event to end. Click **Update**.

5.6.1.2.4 View Responses

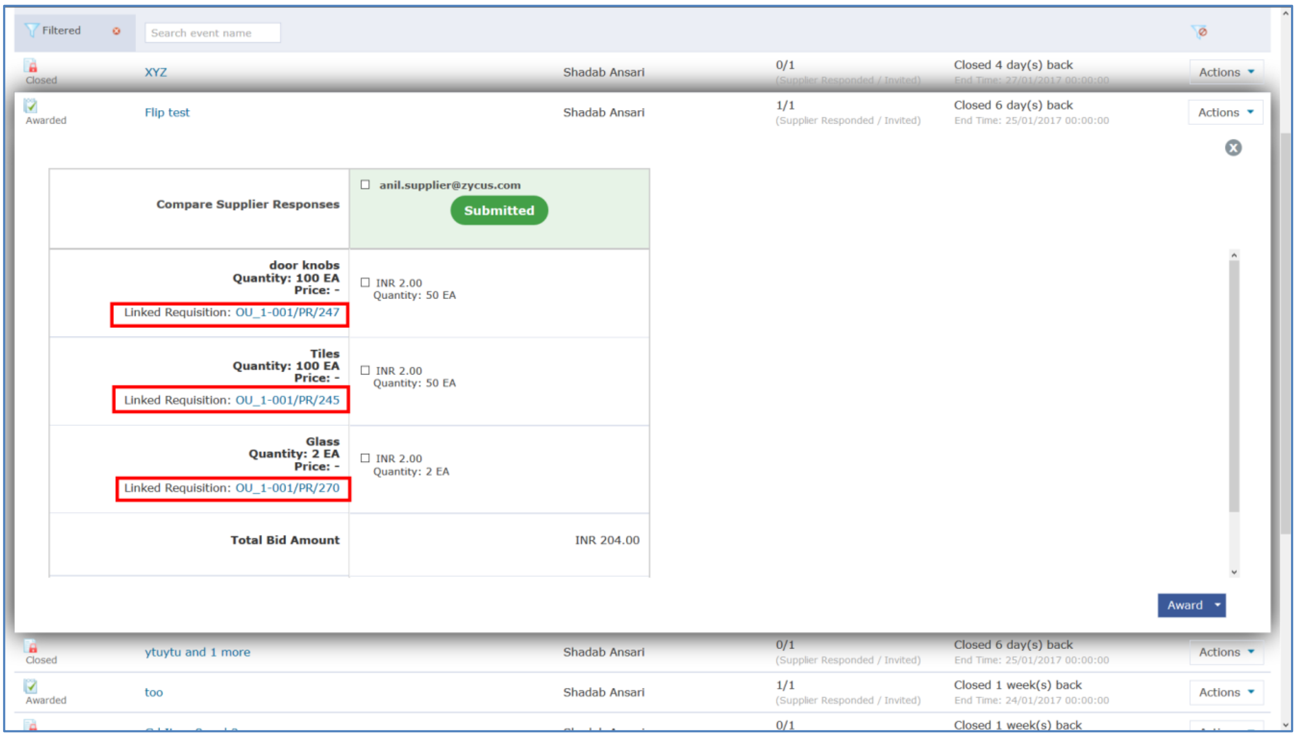
1. For a given event, under the **Actions** drop down menu, select **View Responses.**



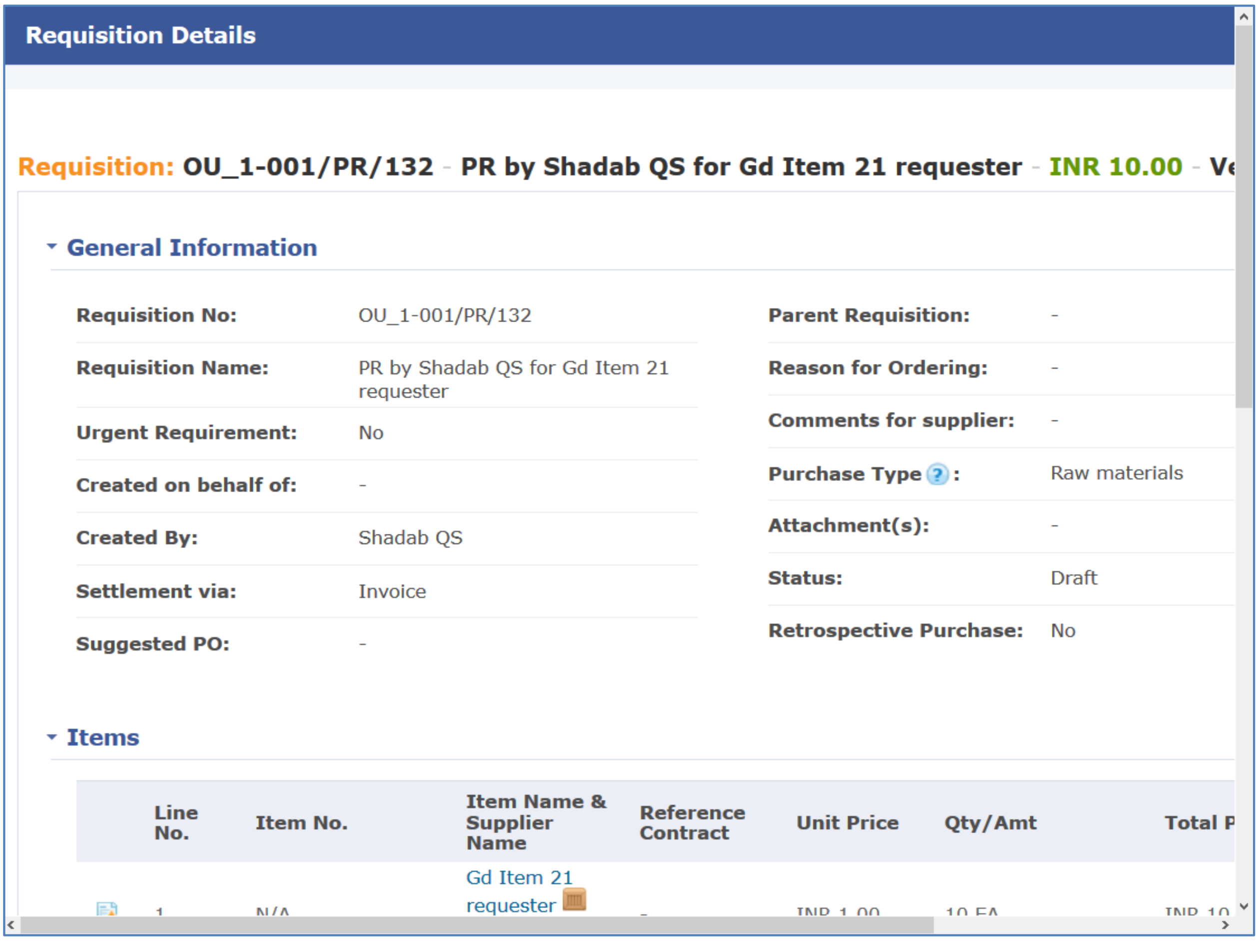
2. **Supplier Response** popup will appear as shown below. This will be a view only popup where you will be able to view the supplier(s) responses for each line item.



3. For reference purpose, you will also be able to view and open the **Requisition Number** from which the quick sourcing event was created *(refer the image below)*.



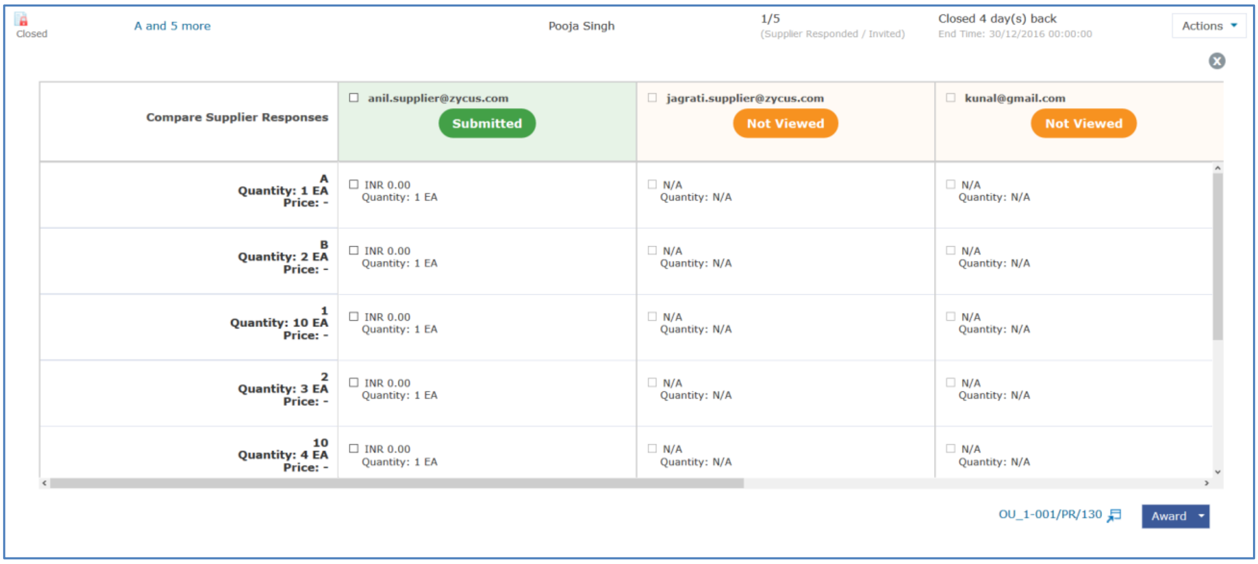
4. The requisition will open in a new tab as shown below:



Provide Feedback

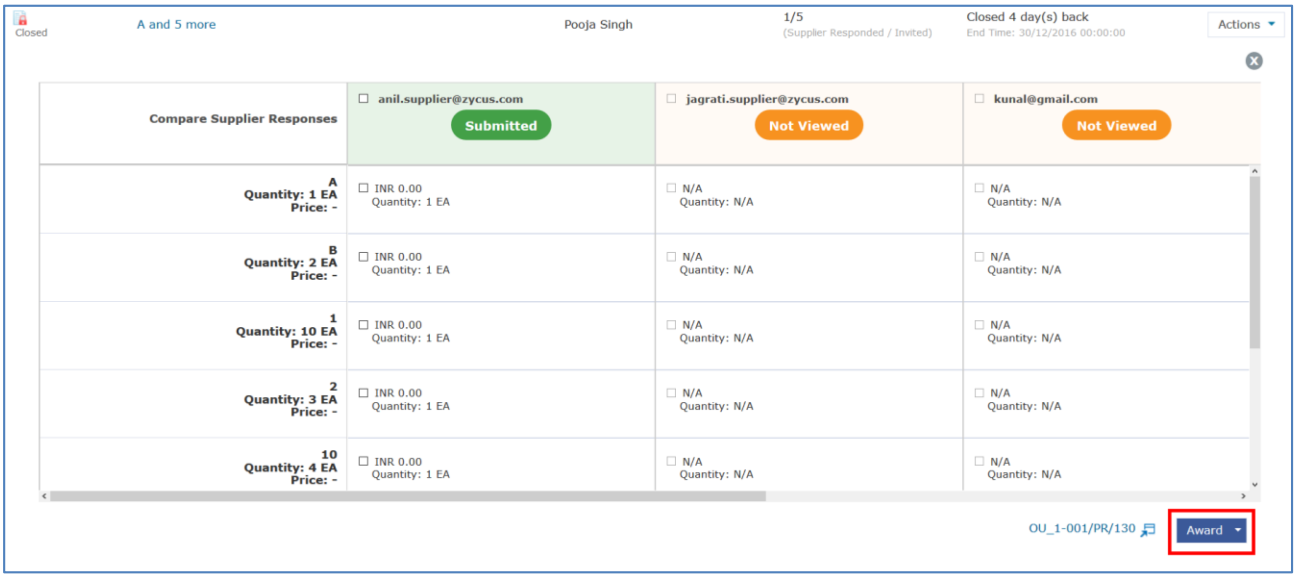
5.6.1.2.5 Closed Events

1. For an event which is closed, you will be able to **View Supplier Responses** and **Award a Supplier**.
2. Under the **Actions** drop down menu, select **View Responses**. Following popup will appear:



3. The **View Response** popup will show a comparison of the prices in line item between each supplier.

4. To award a supplier, on the **View Response** popup, select a supplier (who has provided the best bid) for each line item.
5. You can either select one supplier for all the line items or you can select different supplier for different line items. Once you select the suppliers for each line item, click **Award** button as shown below:

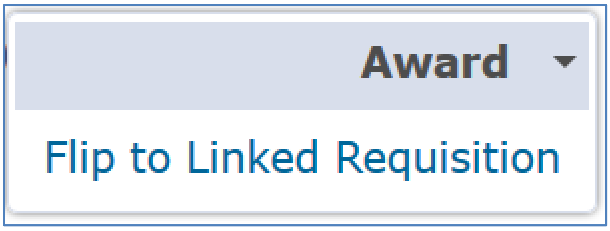


6. You will have an option of flipping the selected quote for an item from the supplier in to a requisition.

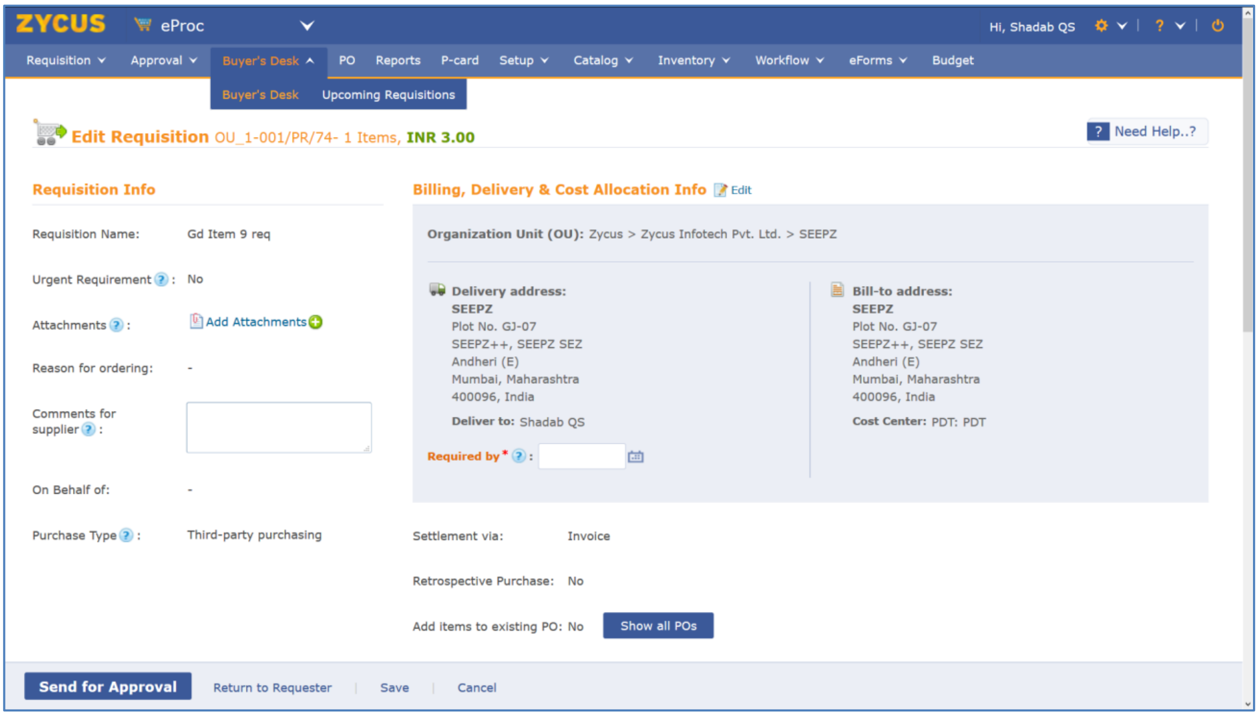
5.6.1.2.5.1 Flipping to Linked Requisition

Provide Feedback

If a sourcing event is created from an existing requisition through eProc, then while awarding, you will have the option to flip the selected items to **Linked Requisition**.



1. Select **Flip to Linked Requisition**. You will be navigated to the **Checkout** page:



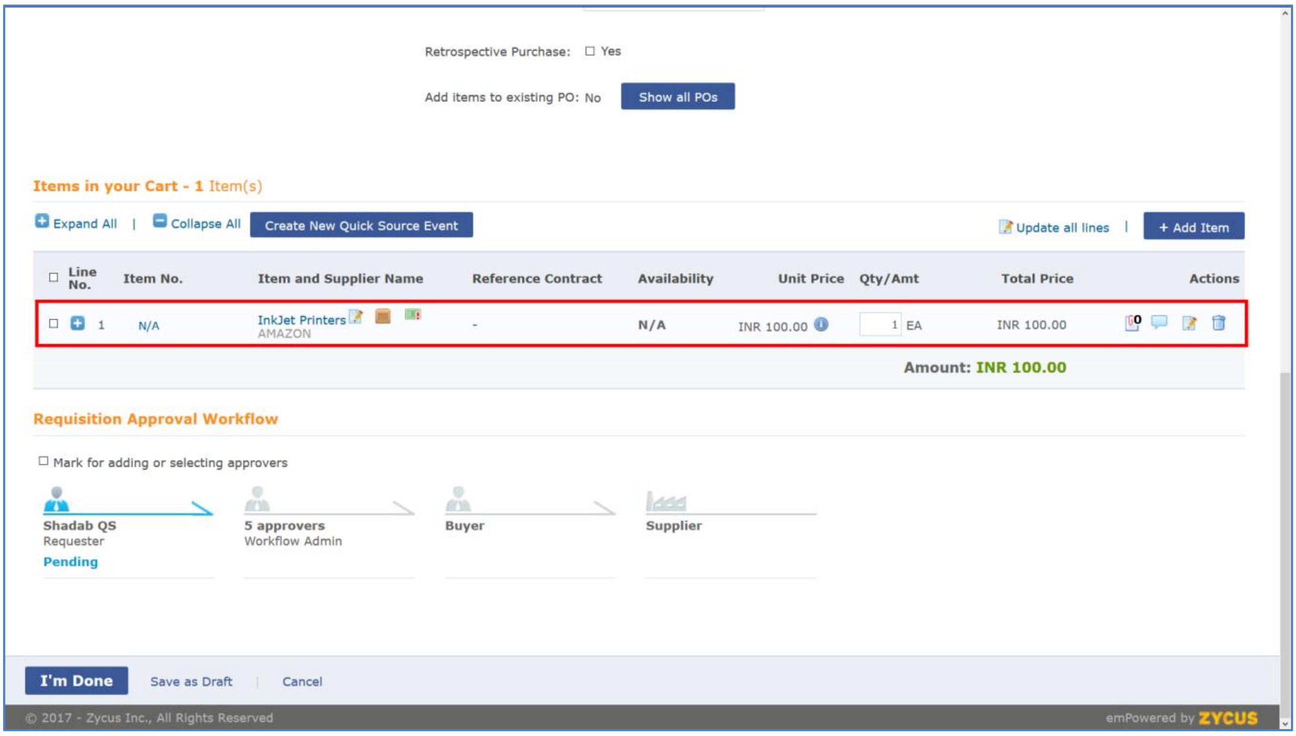
2. This will be the same requisition from which you created a quick sourcing event. However now the requisition will be updated since you will have quotes from the suppliers for the selected item(s).
3. Fill in the required information in the requisition and you can proceed to submit or sent the requisition for approval.

5.6.1.2.5.2 Flipping to New Existing Requisition

If a sourcing event is created from scratch through eProc, then while awarding, you will have the option to flip the selected items to **New Requisition** or **Existing Requisition**.

Provide Feedback

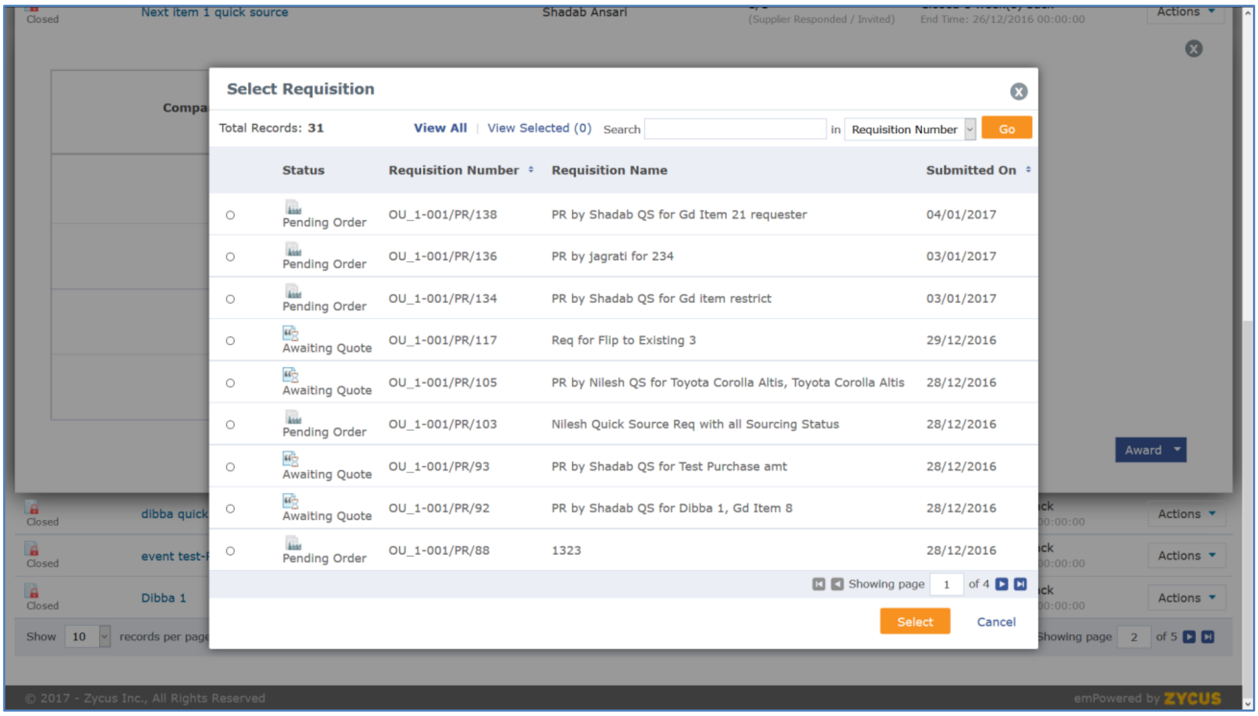
1. Select **Flip to New Requisition**. You will be redirected to the **Checkout** page:



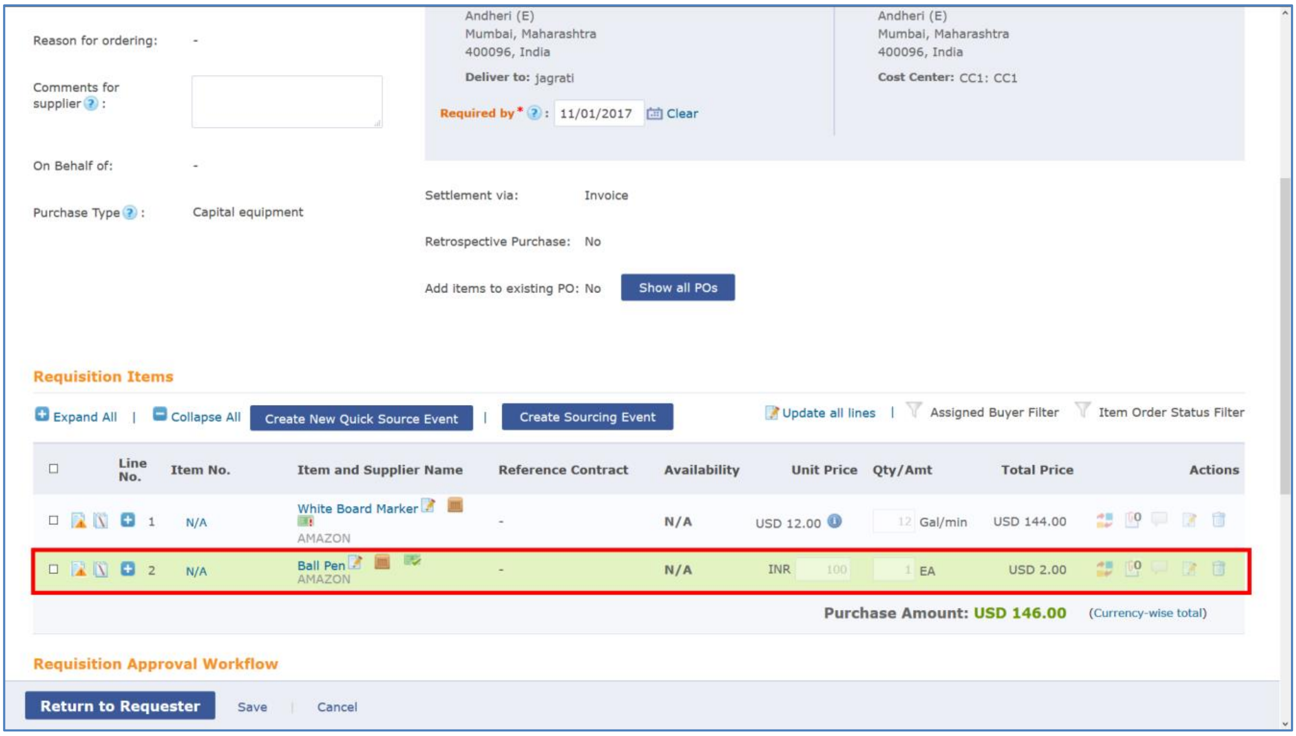
2. Note that the item you selected from the sourcing event will be automatically added to the items in your cart. You can precede to checkout this item once you fill all the requisition details.

5.6.1.2.5.3 Flipping to Existing Requisition

3. Select **Flip to Existing Requisition**. A popup will appear which will list all the requisitions which are in **Pending Order** or **Awaiting Quote** status.



4. You can choose any one requisition in which the selected item will be added. On selecting a requisition, you will be navigated to the **Checkout** page as shown below:



5. The item(s) that you selected to be added to the existing requisition will be highlighted in green as shown in the image above.
6. You can precede to checkout the items once you fill all the requisition details.

Note: If you are not the owner of the sourcing event, then you will not be able to award the supplier response.

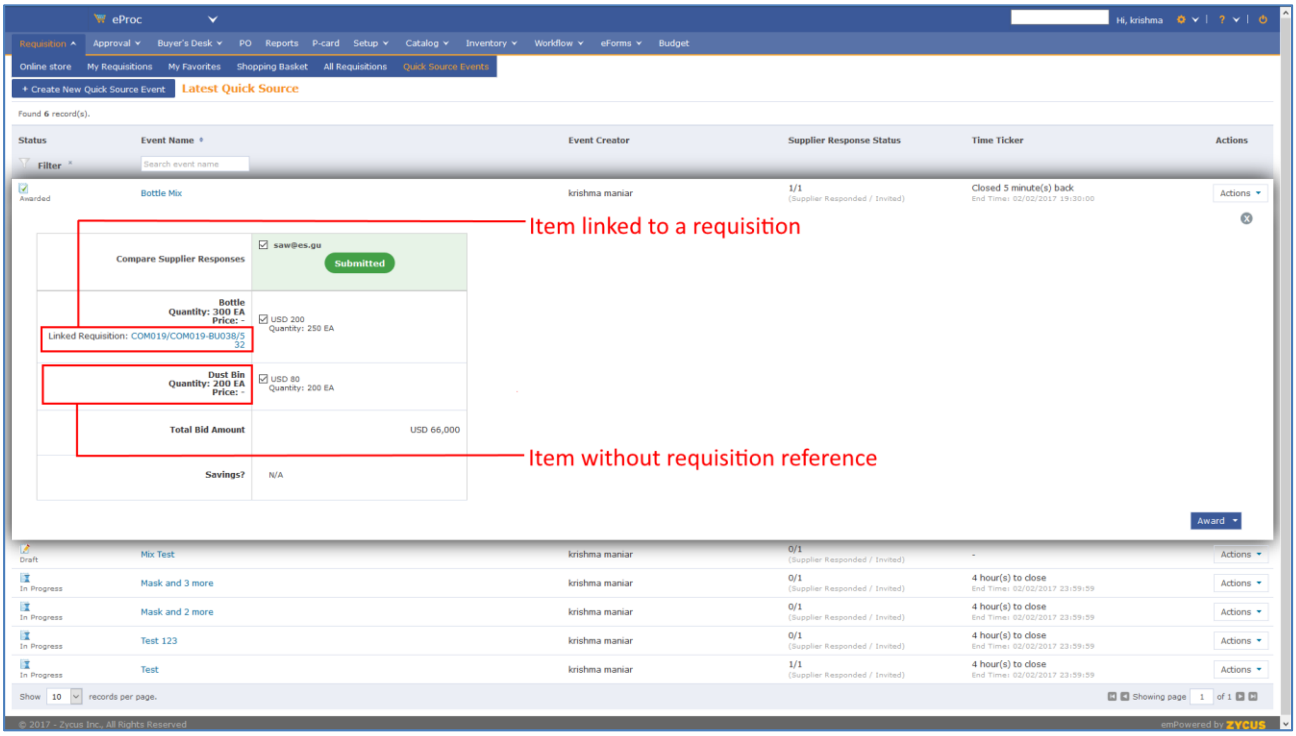
5.6.1.2.5.4 Flipping Linked and Non-Linked Items

Users can create quick sourcing events for items from different requisitions using the item level view on Buyer's Desk.

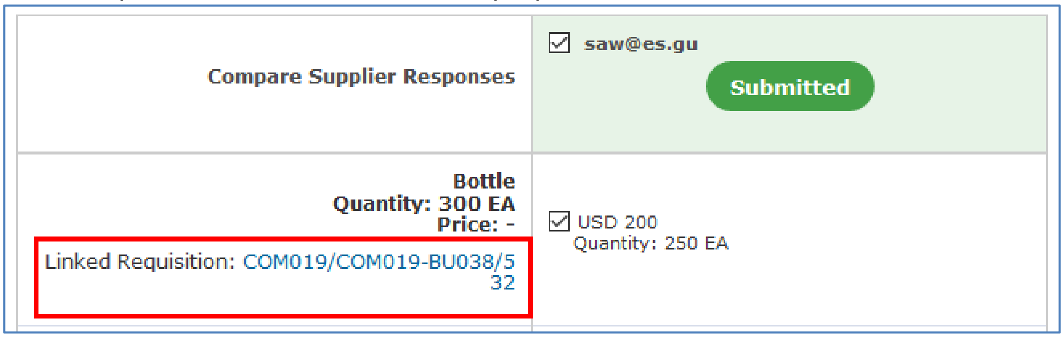
When the Quick Source event is awarded and flipped back, the item details will be flipped onto the linked requisitions.

If a quick source event consists of items which have no requisition reference, then the user will also have an option to flip such items into a new or existing requisition.

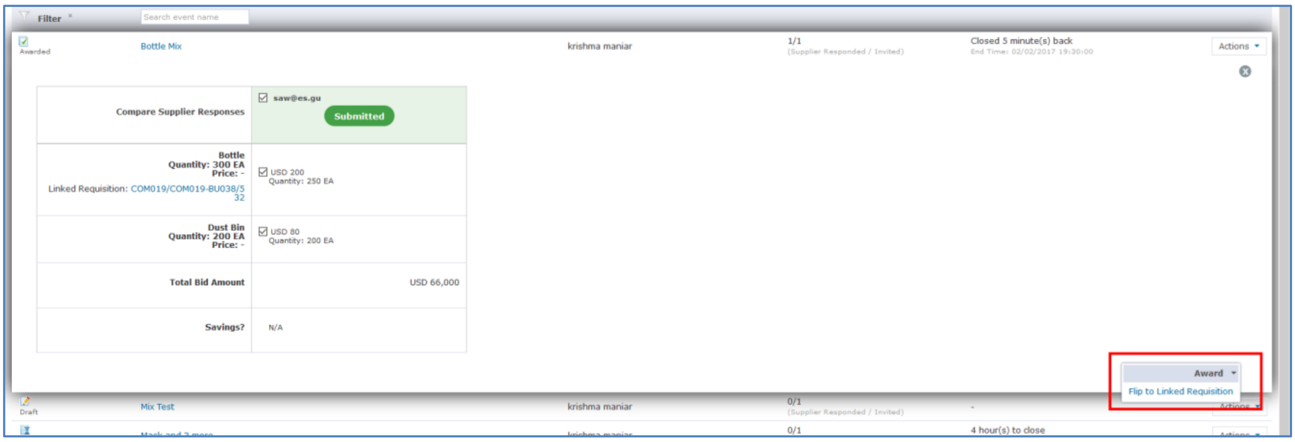
4. On the **Quick Source Events** page, open an event which is awarded. Event consisting of items with reference and without requisition reference will appear as shown below:



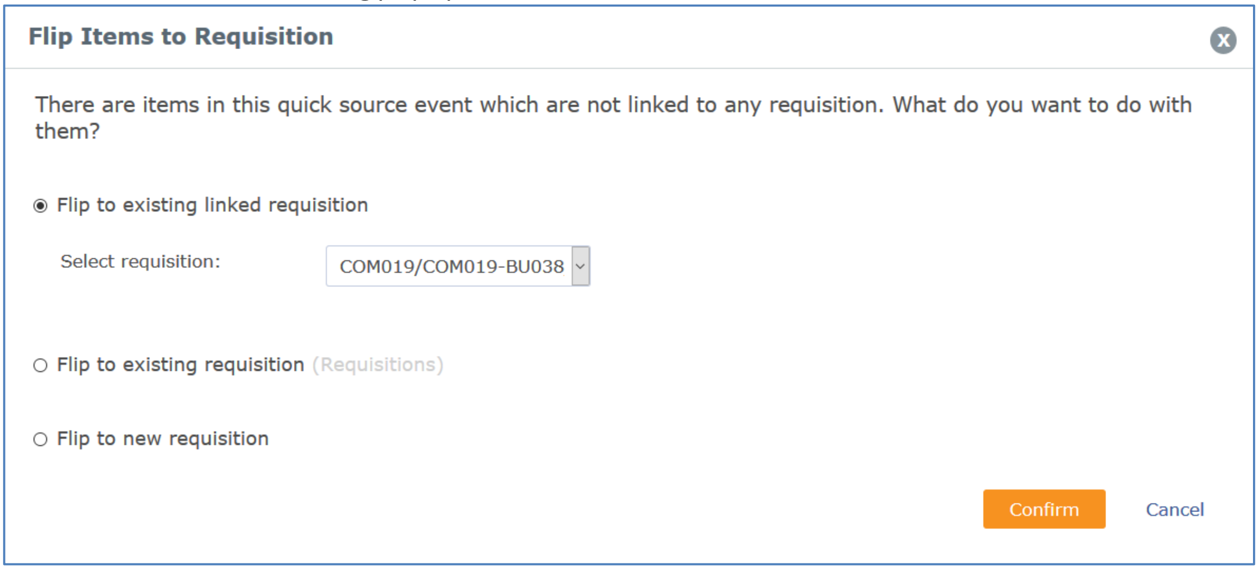
5. The linked requisition reference will be displayed as shown below:



6. To flip the items into requisitions, click **Award**. Select **Flip to Linked Requisitions** as shown below:



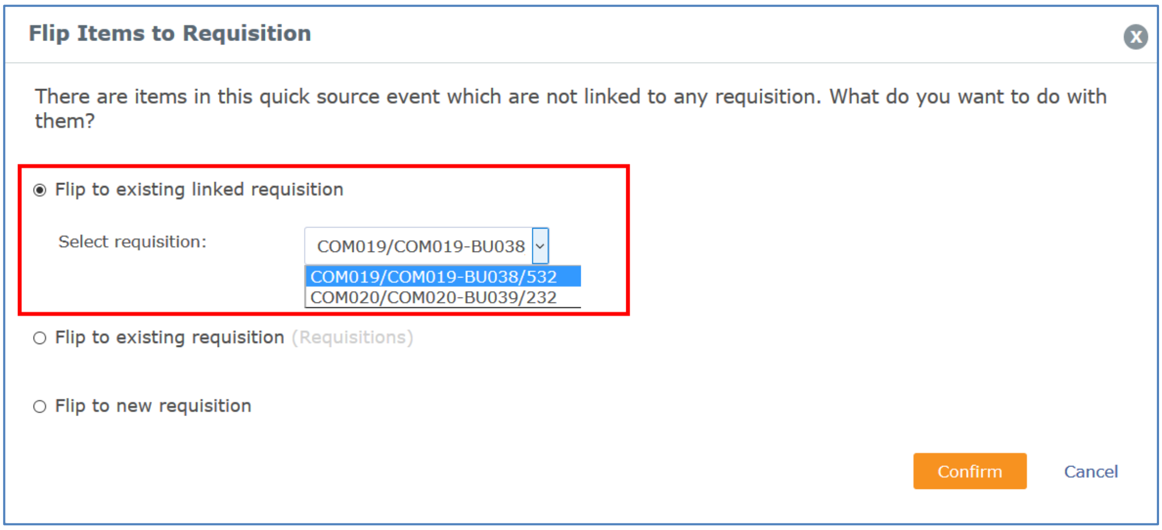
7. You will see the following popup:



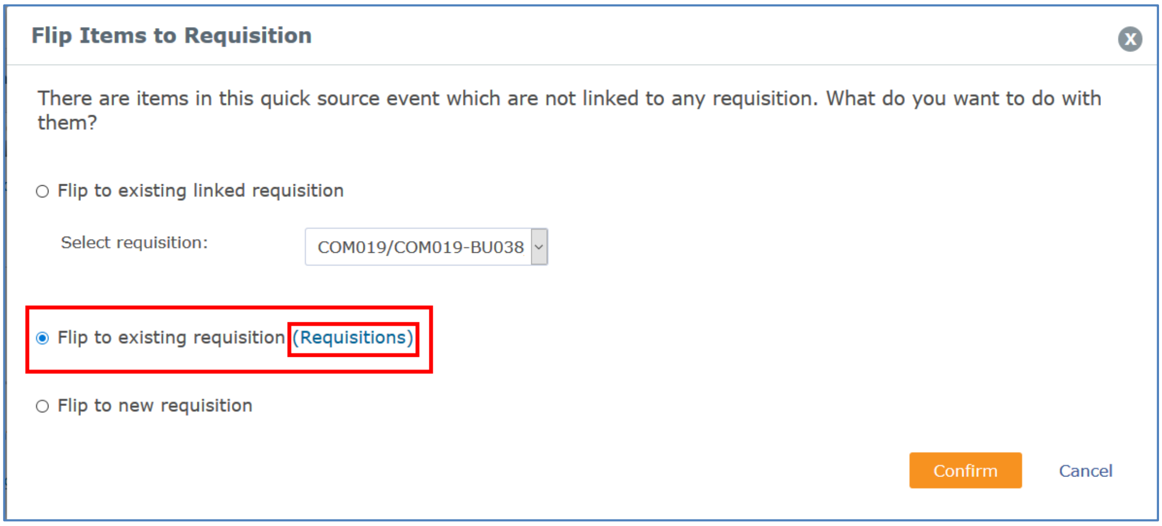
Note: Since your event consists of items without requisition reference, you will see the above popup.

8. To address the line items which is without requisition reference, you have an option of:

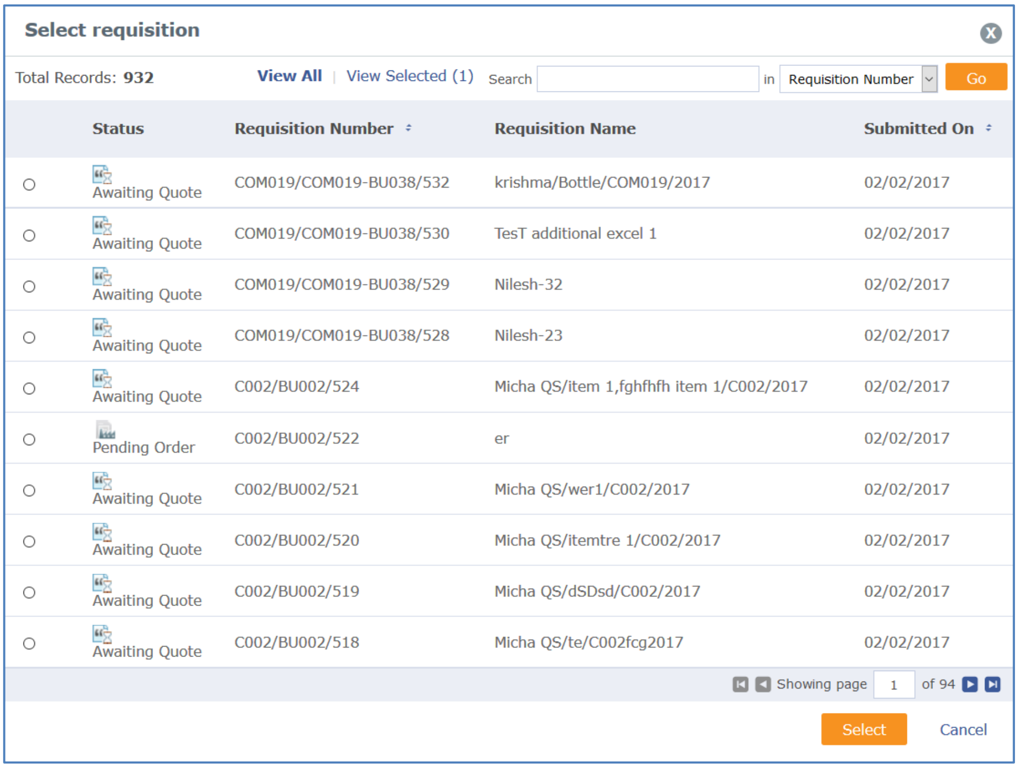
- **Flip item to existing linked requisition**: If you want to link the item to any linked requisition from this quick sourcing event, then select the requisition from the drop down list.



- **Flip item to existing requisition**: If you want to link the item to any requisitions on eProc, then select this option. Click **(Requisition)** link as shown below:



  - A popup will appear. This popup will have all those requisitions listed whose status is "**Awaiting Quote**". Choose the required requisition from the list and click **Select.**



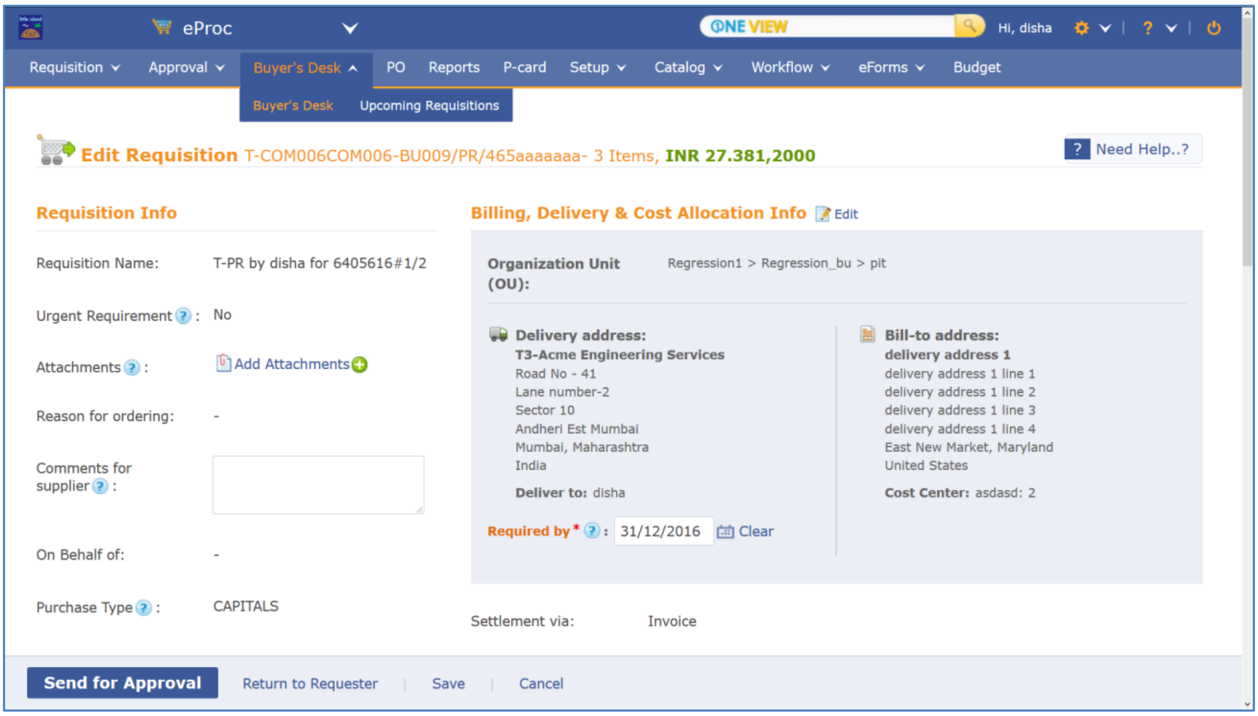
- Your item will be linked to the selected requisition.

- **Flip to new requisition**: If you wish to flip the item to a completely new requisition, then select this option and click **Confirm**. A completely new requisition will be created and listed under **My Requisitions** tab.

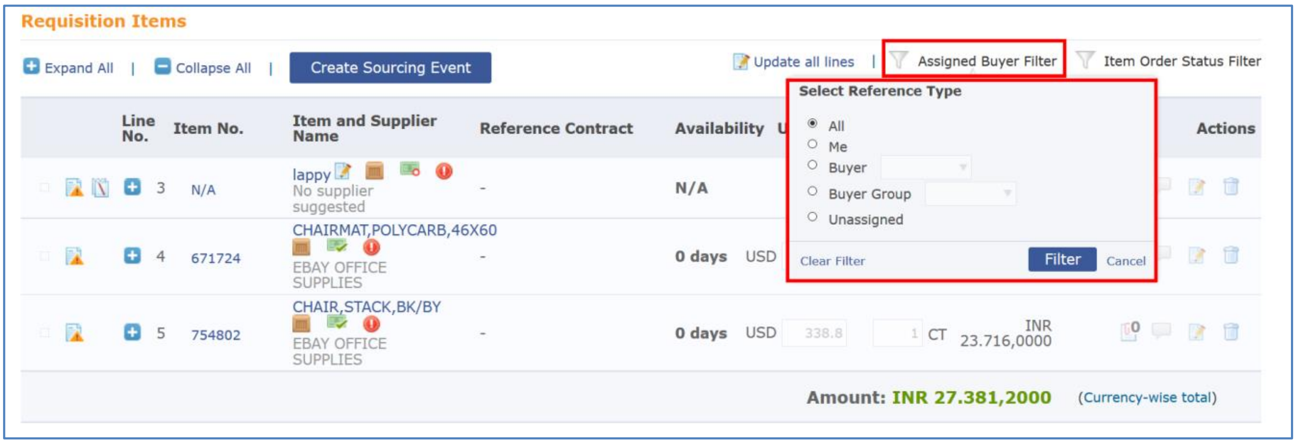
5.7 Actions on Item Groups

5.7.1 Filter Items by Assigned Buyers

1. Click the **Requisition Number** to view and update the details. The following page is displayed.

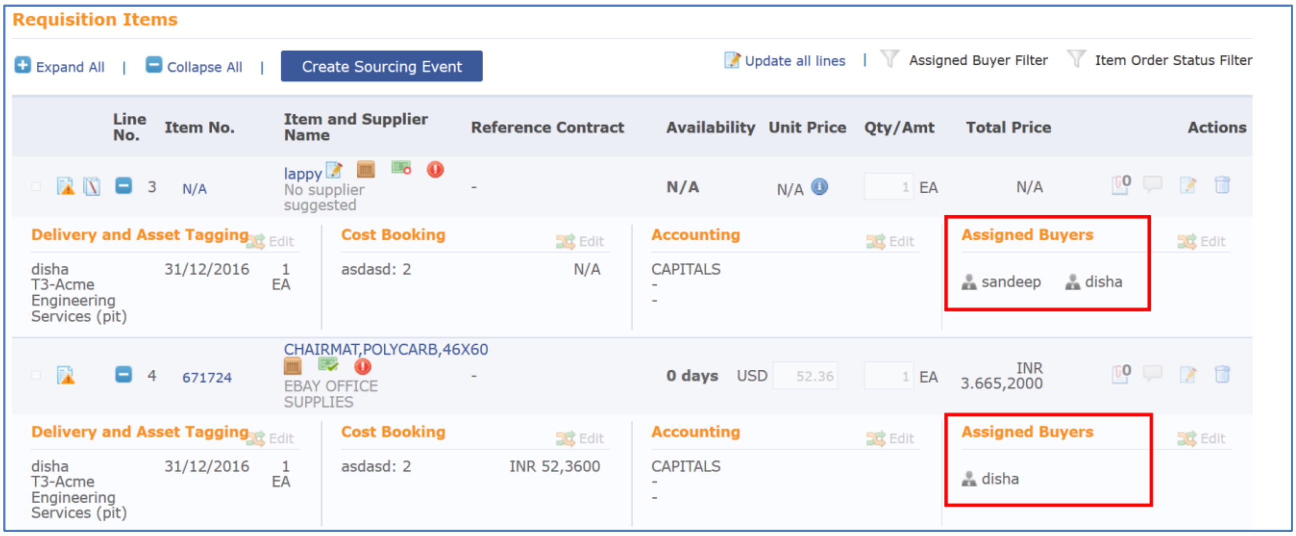


2. Go to **Requisition Items** section. Review all the line items added in the requisition.



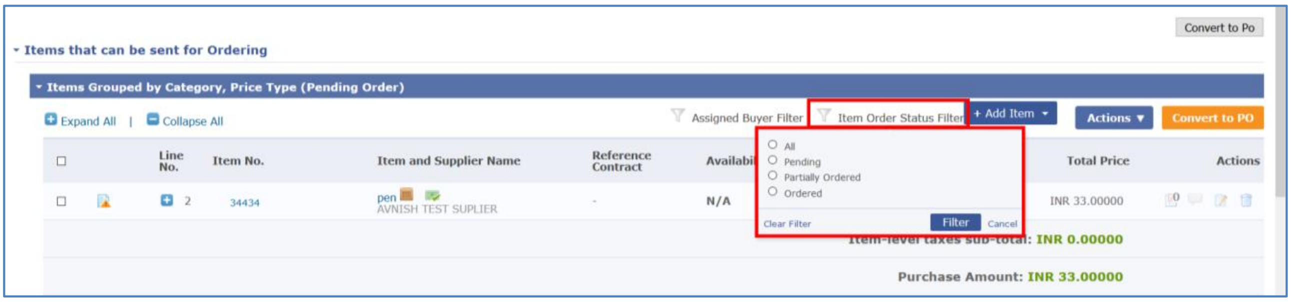
3. You can choose to filter the requisition line items based on the assigned buyer since they are assigned at line level.
4. Click **Assigned Buyer Filter**. You can filter the line items based on following parameters:
    - All: View all the line items, irrespective of the buyer assigned.
    - Me: Line items assigned to me
    - Buyer: Line items assigned to a different buyer (search for the buyer by entering the keyword)
    - Buyer Group: Line item assigned to a buyer group (search for the buyer group by entering the keyword)
    - Unassigned Items: Line items which are not assigned to any buyer.
    - Once you make your selection click **Filter**.
5. You can also view the buyers for all line items by expanding the line item details *(highlighted in the image below)*.

Provide Feedback



5.7.2 *Filter Items by Item Order Status*

1. You can filter for the items based on their order status. Select the status from the options and click **Filter**. The item table will refresh and show only the relevant items.



5.7.3 *Adding Items to a Requisition*

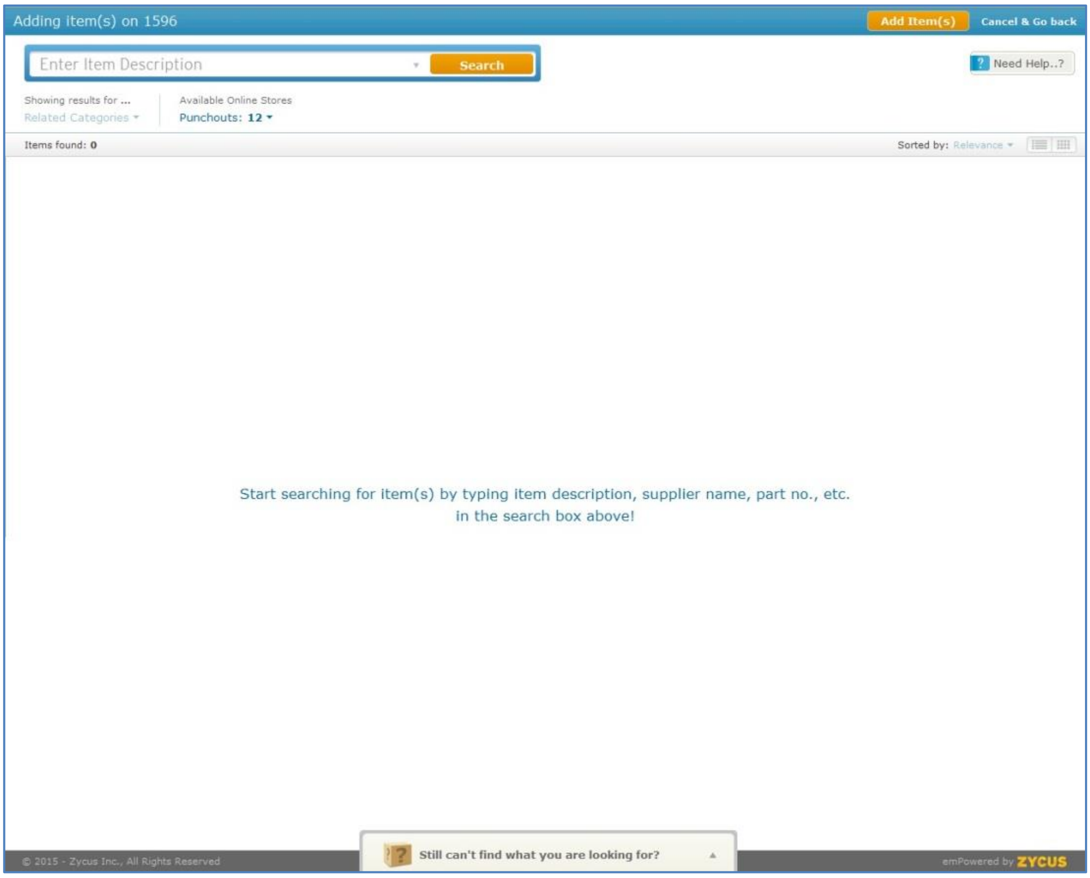
To add items to a requisition on the Buyer's Desk page:

1. Click the **Add Items** to add new items to the Requisition.
2. Select any one of the required options:

   a. **Search Items** – Search the existing items & add the required items

      i. Enter the name or the description of the item to be search & added.

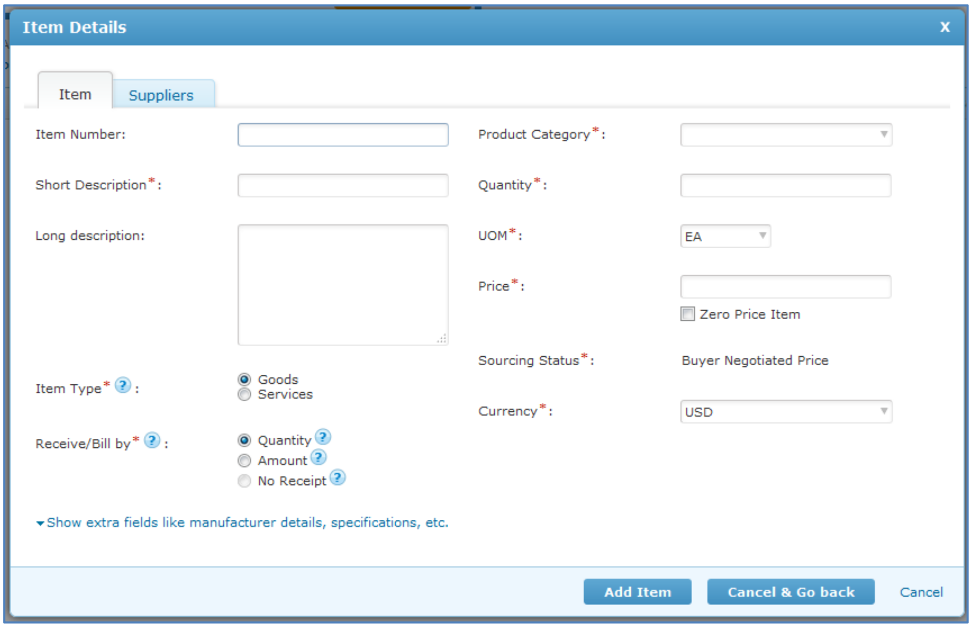
Provide Feedback



ii. A list of items matching the entered name or description is displayed.
iii. Roll over on the **Related Categories** button to view items from other categories.
iv. Roll over on the **Sorted by** button and select an option from the list to sort the items in the list.
v. Click **Switch to Grid View**  to view the items as grid.
vi. Select the required items using the check boxes next to them.
vii. Enter the quantity required for the item in the textbox next to the **Item Description**.
viii. Click **Add to Cart** to add the items to the Requisition.

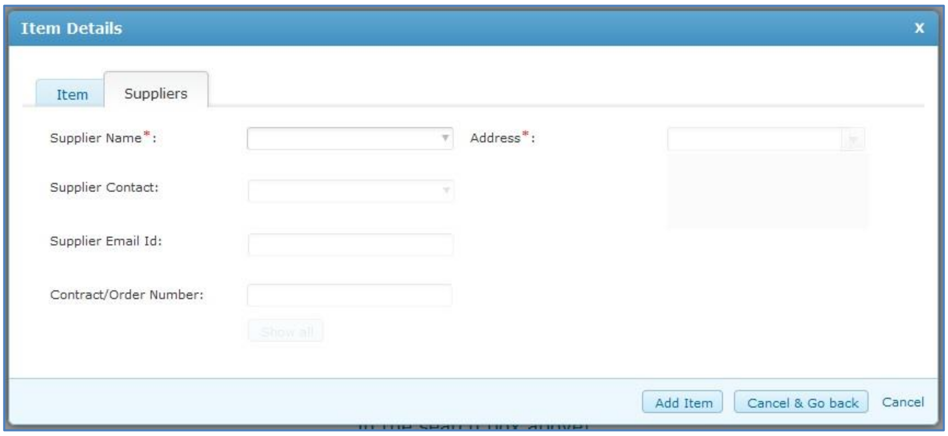
b. **Create a free-text Item** – Create & add the required free-text items

i. Enter the required details in the **Item** tab.



ii. To add information like manufacturer name and so on, click on the **Show extra fields like manufacturer details, specification, etc.** and enter the required details.

iii. Click on the **Suppliers** tab.



iv. Enter the **Supplier Name** and select the required supplier.

v. Select the required supplier address. The rest of the information is auto populated as per availability.

vi. Enter the **Contract/Order Number** or click **Show all** to select an existing contract/order number.

vii. Search & select the required **Blanket Order** or **Contract** as per requirement.

viii. Click **Save** to save the selected **Blanket Order** or **Contract**.

ix. Click **Add Item** to save and add the free-text item.

Provide Feedback

c. **Punchouts** – Search the existing punchouts & add the required items

i. The available Punchouts are displayed. Select the required Punchout.
ii. You will be automatically directed to the Punchout.
iii. Select and add items to the cart.

Note: *In the punchout cart, you will see items added during that punchout visit along with punchout items added earlier or other items.*

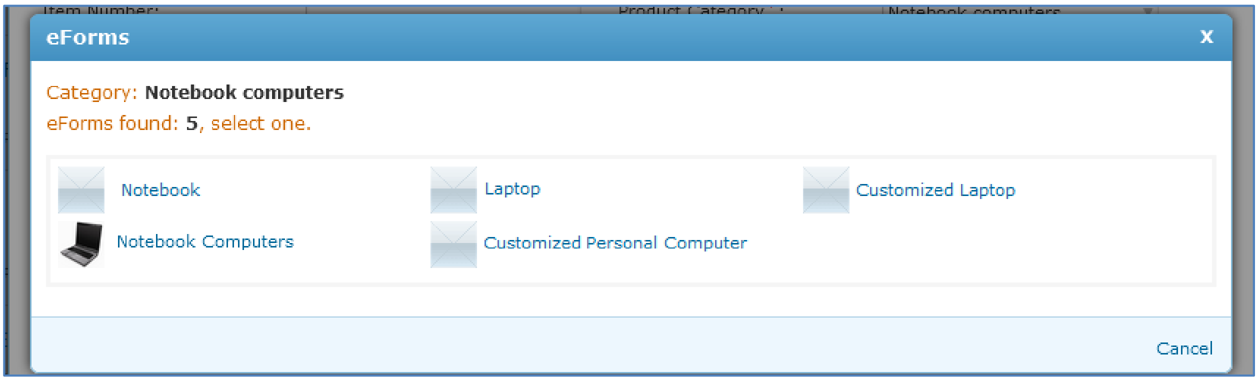
iv. Add the required items from the Punchouts to the cart.
v. Checkout the cart from the Punchout.
vi. All the items from the Punchouts cart will be added to the Requisition.

Note: *The items added to a Requisiton from under the **Buyer's Desk** tab are displayed with a Green Background to classify.*

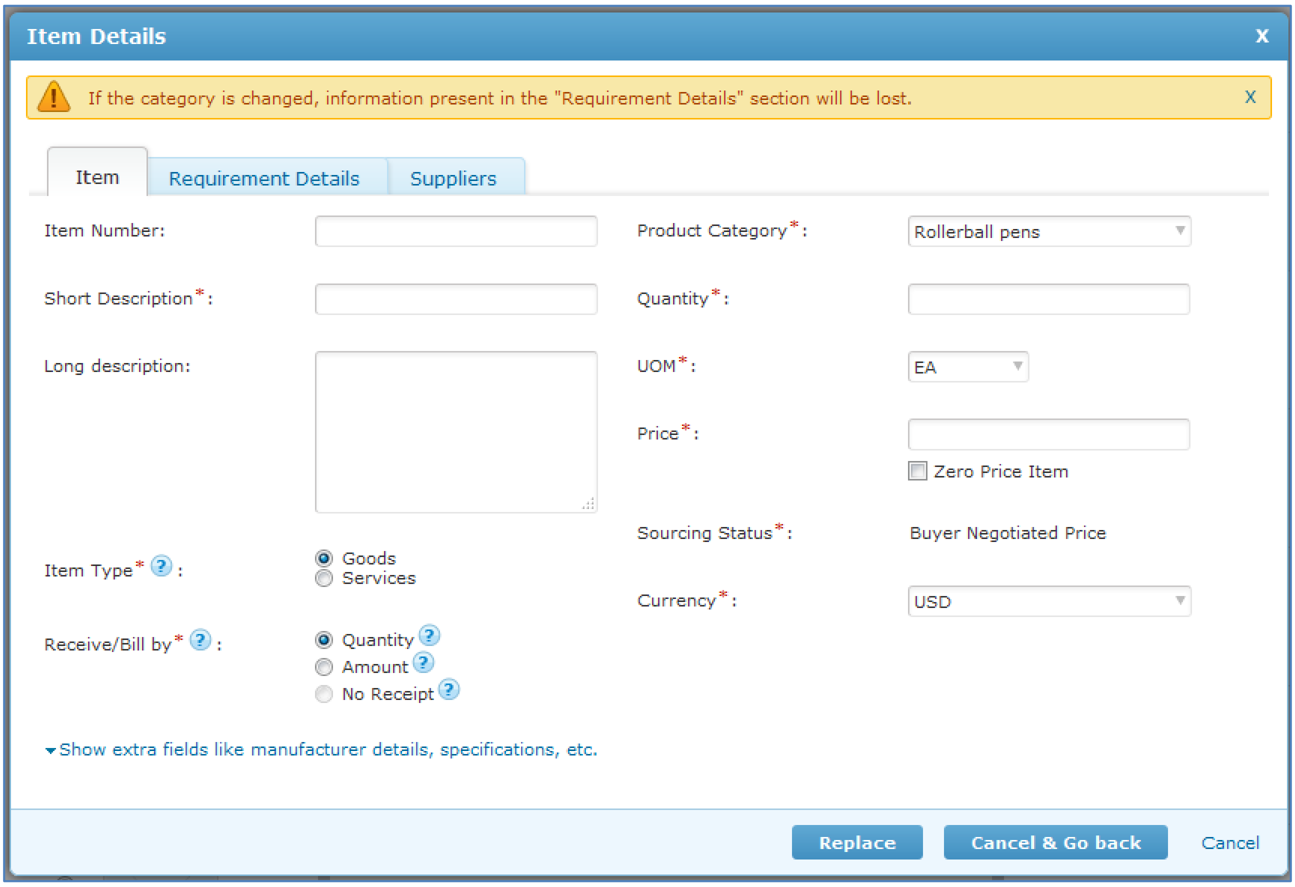
Note: *Items can be added to a Requisiton from under the **Buyer's Desk** tab only if none of the items from the Requistion are ordered OR the Requisition has not been converted into a PO.*

5.7.3.1 Replacing Items in Requisition

1. Click Replace Item icon for corresponding item to be replaced. eForms dialog box is displayed.



2. Click any category to select. The **Item Details** dialog box is displayed as shown below.



3. Enter the **Item Numbers, Short Description** and **Long Description** for the item. The **Product Category** is automatically populated as per the selected category.

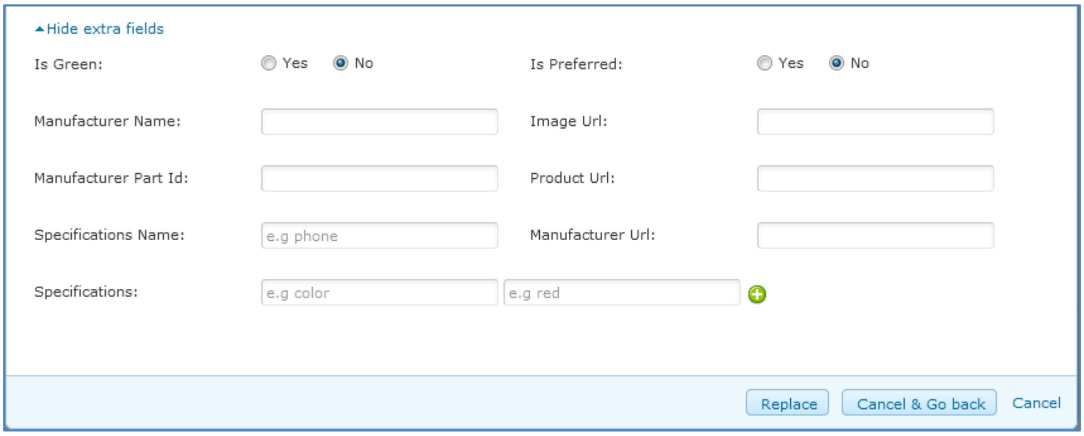
4. Enter the **Quantity**, select the Unit Of Measurement (**UOM**) and **Price** of the item.

NOTE: *Check the **Zero Price Item** in order to add an item with no price or zero price to the Catalog.*

5. Select the **Item Type** (Goods / Services) and select **Receive / Bill By** from following options:

- Quantity - Selected UOM will be used for invoicing and receiving
- Amount - Selected currency will be used for invoicing and receiving
- No Receipt – Selected UOM will be used for invoicing.

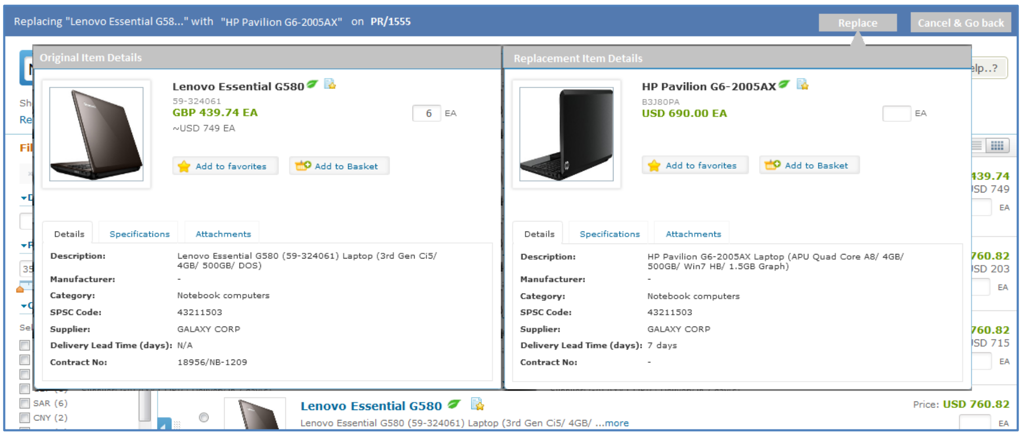
6. Click **Show extra fields like manufacturer details, specifications, etc**. to enter non-mandatory fields related to item as shown below.



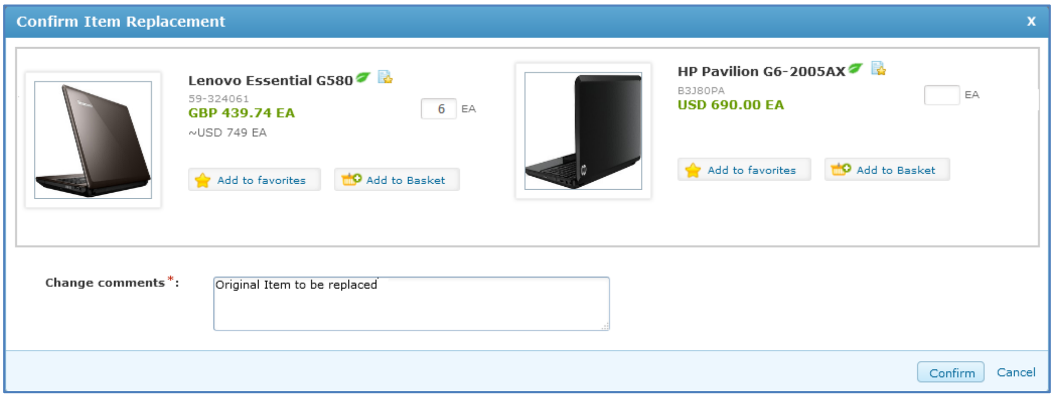
7. Select the appropriate option for **Is Green** and **Is Preferred**. Enter the Specifications Name, the Specifications and click Save.

8. Enter the Manufacturer, Product details and specifications in their respective fields.

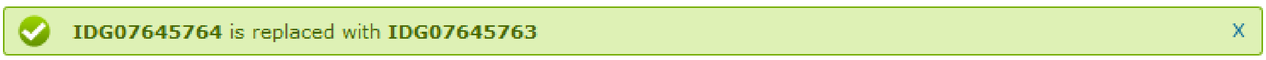
9. Click **Replace** to replace the item with the selected item



10. Enter the quantity in the **EA** field and click **Replace**.



11. Enter **Change Comments** and click **Confirm**. A confirmation message is displayed as shown below.

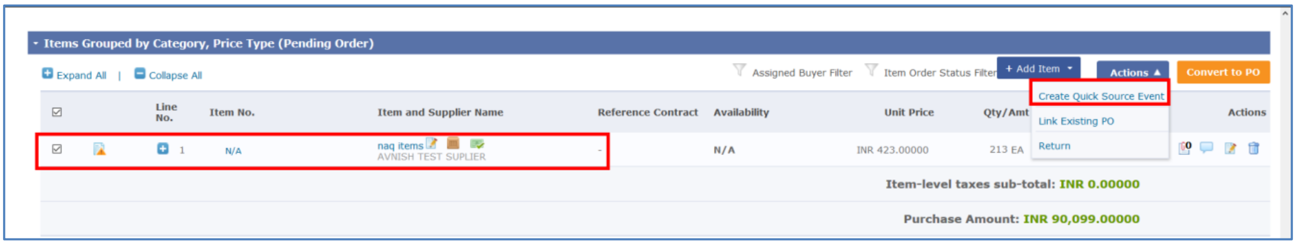


Provide Feedback

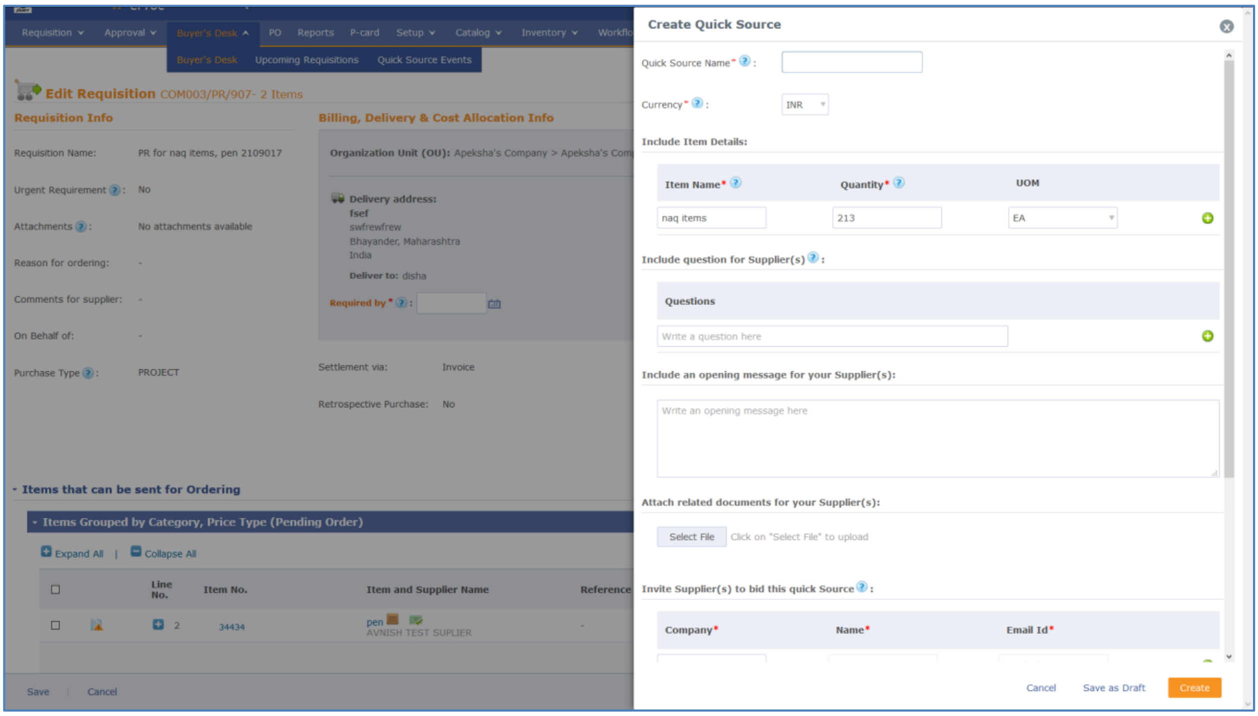
5.7.4 Create New Quick Sourcing Event

If there are any **Guided Procurement** items added to your cart, then you will be able to create a quick sourcing event for those items.

1. To create a new quick sourcing event, select the (**guided procurement**) items from cart as shown below and click **Create New Quick Sourcing Event**.



2. A side by side Quick Source panel will appear where you can initiate a quick source event.



3. **Quick Source Name:** Enter the name of the quick source inquiry. This field is marked as mandatory, but however if you don't enter the inquiry name, then it will be auto-set to {first item name & count of remaining items}.
4. **Currency:** Select the currency for this event. The currency selected here will be used for bidding. Once quick source is awarded and flipped into a requisition, this currency will be maintained.
5. **Include Item Details:** All the items selected from the item table will appear in a grid on the side by side panel.
   You can change the **Item Name**, **Quantity**, **UOM**, and **Market/Current Price**.

   You can also add more items on the quick source panel using the icon.

Provide Feedback

6. **Include questions for Supplier(s):** If there are any questions such as "Will the items be delivered by ship or air?" which you would like to ask the suppliers, you can add those in this section.

7. **Include an opening message for your Supplier(s):** You can write a small message for your suppliers such as "This sourcing event is created for smaller quantity, please submit your bids by the end of Q1." The opening message you write over here will be appended in the mail sent to the suppliers.

8. **Attach related documents for your Supplier(s):** If you want to upload any supporting documents, such as Disclaimers for your suppliers, then use this section. Any file uploaded in this section will be sent to the supplier as an attachment in the email.

9. **Invite Supplier(s) to bid this quick Source:** You can invite suppliers that may or may not be registered by simply entering the details in this section. The unregistered suppliers will get created as a **Potential Supplier Contact** in your **Zycus Supplier management system** or **iSupplier**.

   Enter the supplier **Company**, **Name** and enter the **email ID**.
   You can add more than one supplier for the quick sourcing event.

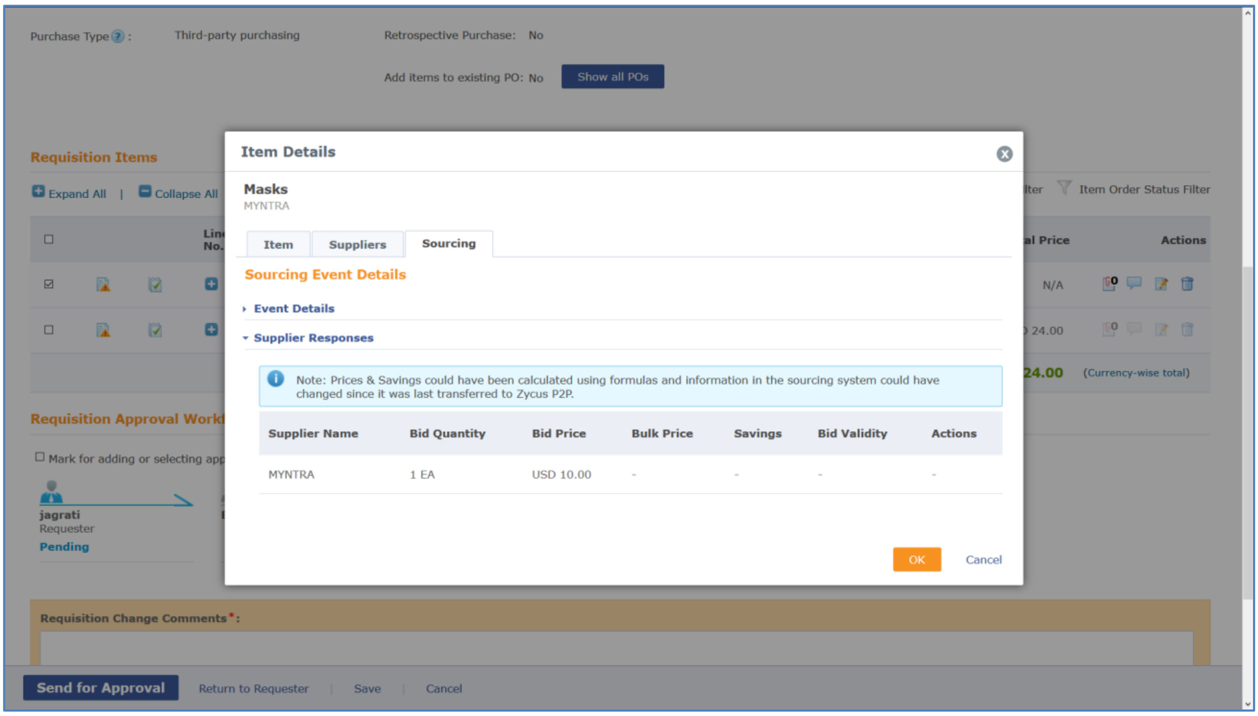
10. **Invite internal collaborators and colleagues:** You can choose to invite internal eProc users to monitor or amend the quick souring event.
    Enter the keywords for the email id of the internal user and the email address will be auto-completed.
    You can add more than one internal collaborators and colleagues.

11. **By when you want quotes from the invited suppliers?:** Select a date by which you want to receive bids from your suppliers.

12. Once all the mandatory information is filled, you can choose to save the quick sourcing event as draft or submit it.

13. Click **Save as Draft** if you want to continue later or click **Create** if you want to submit.

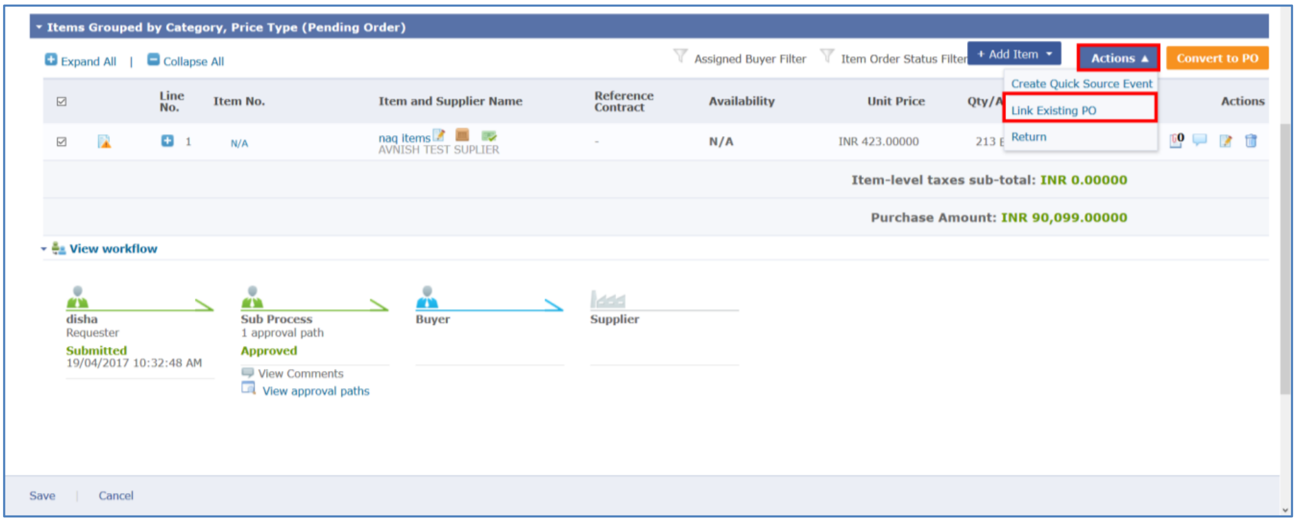
Note: You can create a quick source event for items belonging to an item master. Note that when a quick source event is already created for an item from item master, there will be a new tab - **Sourcing** added in the **Item Details** popup as shown below:



5.7.5 Link Existing PO

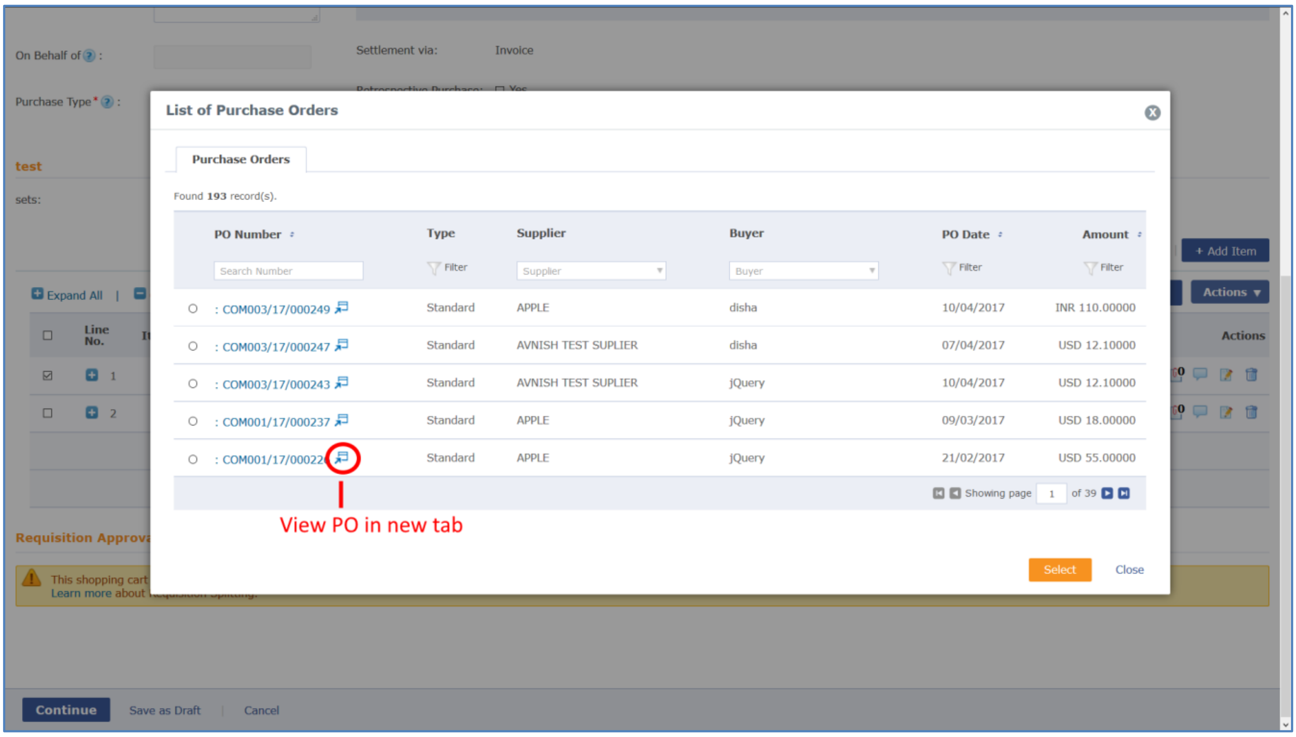
You can link the items from your cart to an existing **PO** of **type Standard** or **Released**.

1. To add the items click **Actions > Link Existing PO** as shown below:

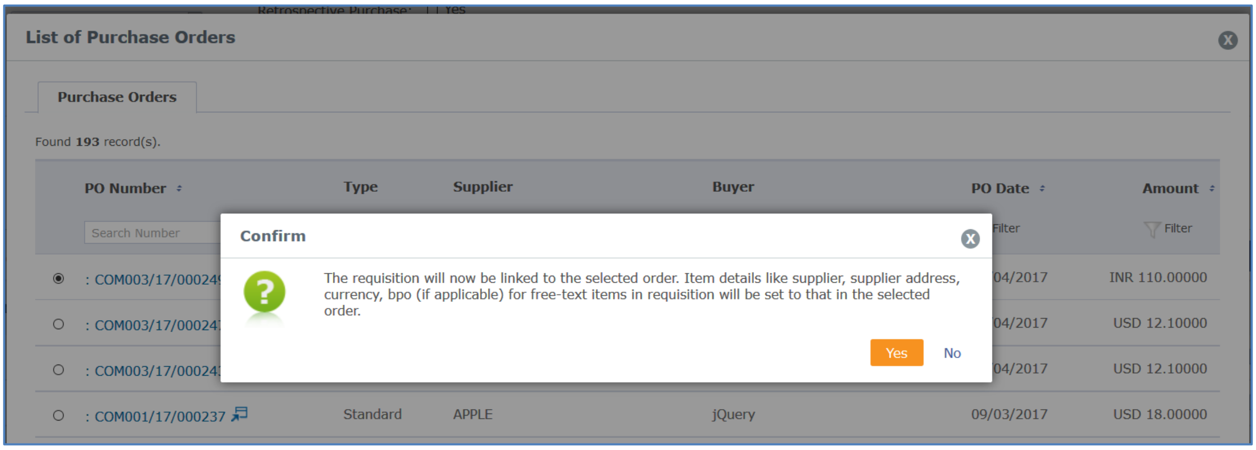


2. A list of PO's will appear in the popup as shown below:

Provide Feedback



3. Choose a PO and click **Select**.
4. You will see a confirmation message which will inform you that current requisition will be linked to the selected order and the item details will be set as per the selected purchase order. Click **Yes** if you agree.



Note: Supplier should be same as that in the selected order.

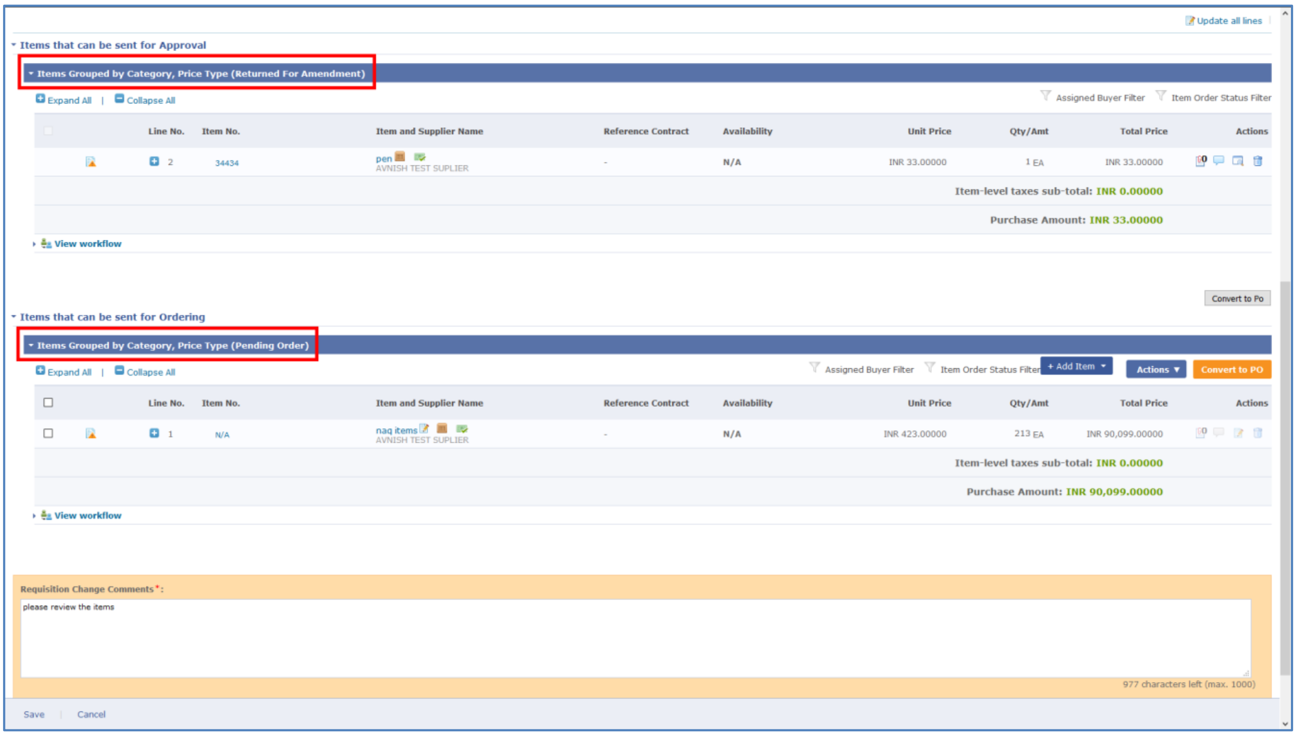
5.7.6 *Return*

If a certain group of items needs to be reviewed by the requestor, then you can return only that specific group.

1. For a given item group, click **Actions** and select **Return**.

Provide Feedback

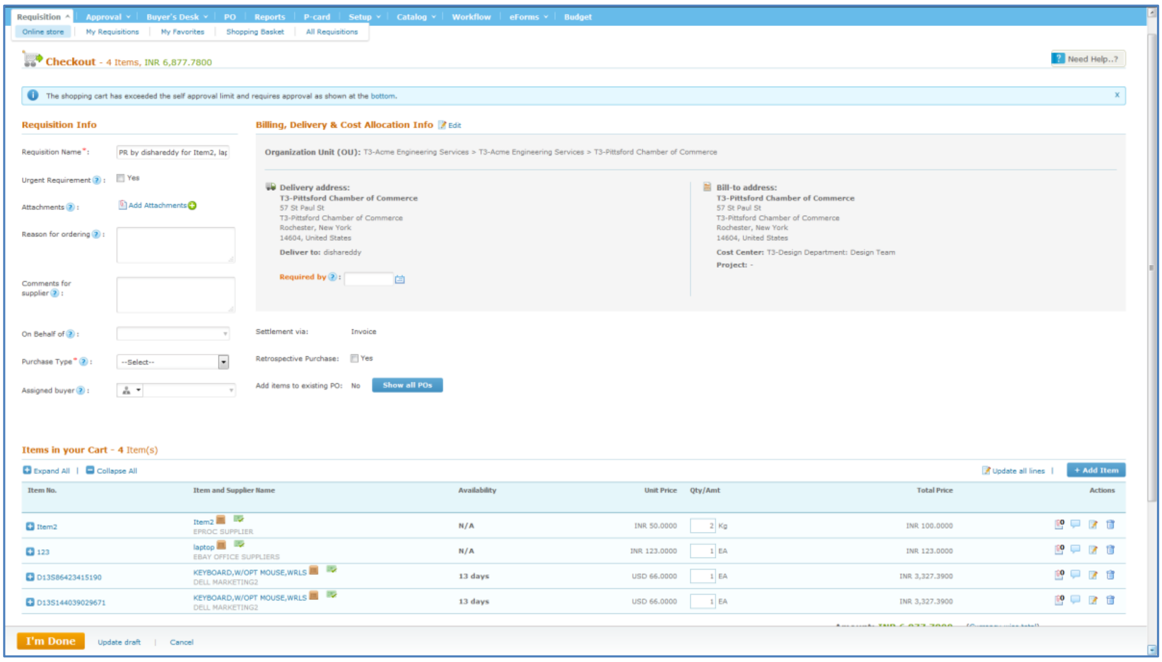
2. Add comments for returning the group.
3. Once that group is returned, you can work with the other groups in that requisition. As shown in the image below, the status of first group is **Returned for Amendment** and status of second group is **Pending Order**.

4. 

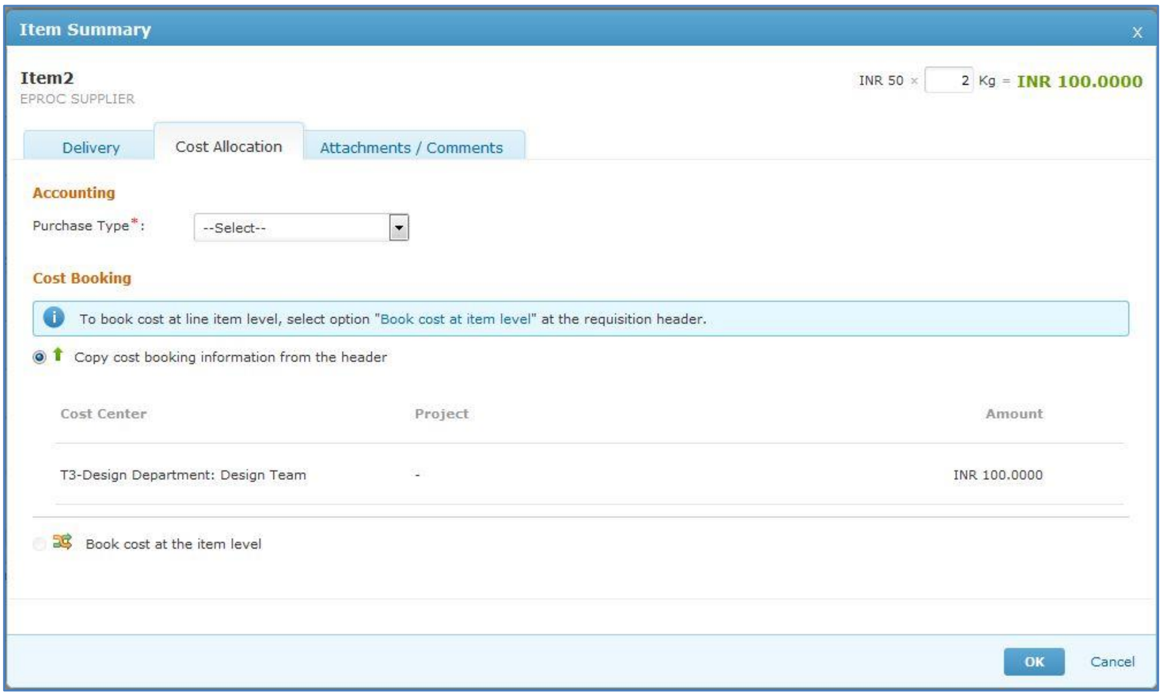
5.7.7 Editing items in a Requisition

If the admin has allowed the user to change the purchase type at line level, then irrespective of header level, user will be able to select different purchase type for every line item.

1. Once you proceed to checkout, you will be redirected to following page:



2. Click edit against any of the line items and select **Cost Allocation** in the popup.

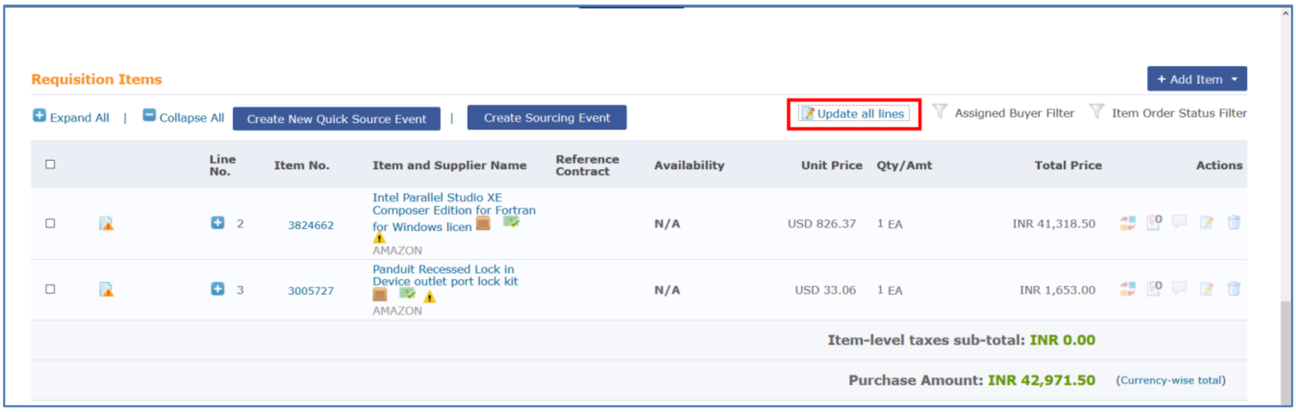


3. Under the **Accounting** section, there will be a drop down for **Purchase Type**. Select the purchase type as required for that particular line item.

5.7.8 *Update All Lines*

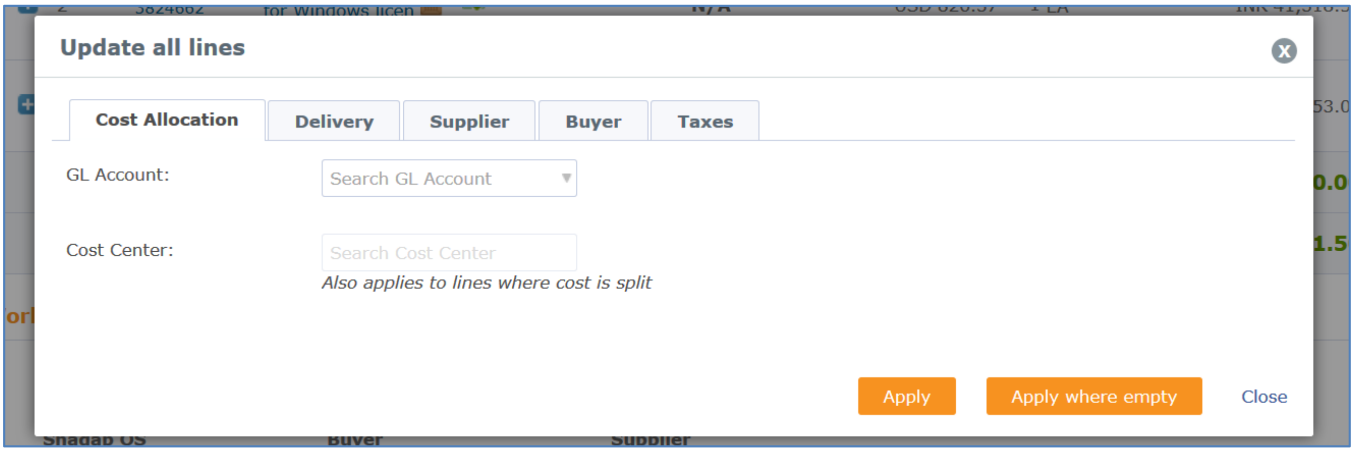
In order to update information for all the line items in a requisition, use **Update all lines**.

2. Open a requisition from your **Buyer's Desk**. Under the **Requisitions Items** table, click **Update all lines** as shown below:



3. Following popup will appear:

Provide Feedback

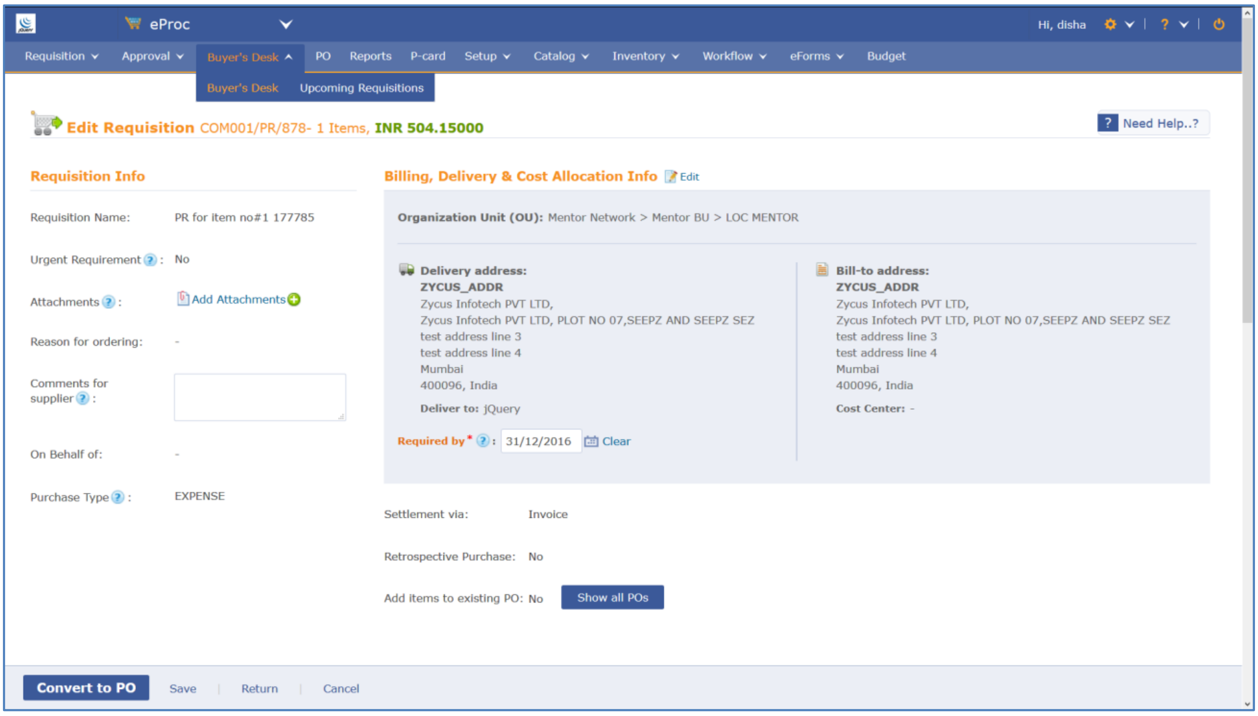


3. Here you can update the Cost Allocation, delivery, supplier, buyer, and tax information.
4. Click **Apply** if you want the updated information to all the line items.
5. Else click **Apply where empty** where only the lines missing information will be updated.

5.7.9 Converting Requisition to Purchase Order

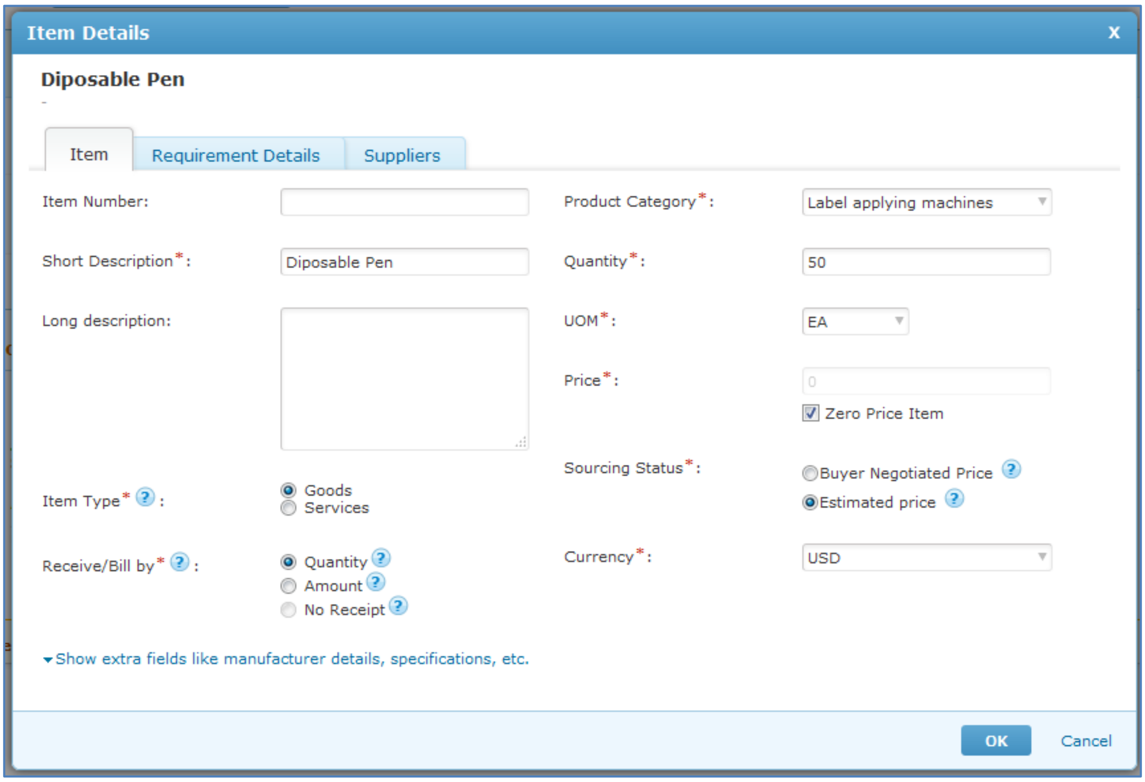
To convert a requisition to purchase order (PO) on the Buyer's Desk page:

1. Click the **Requisition Number** to view and update the details. The following page is displayed.

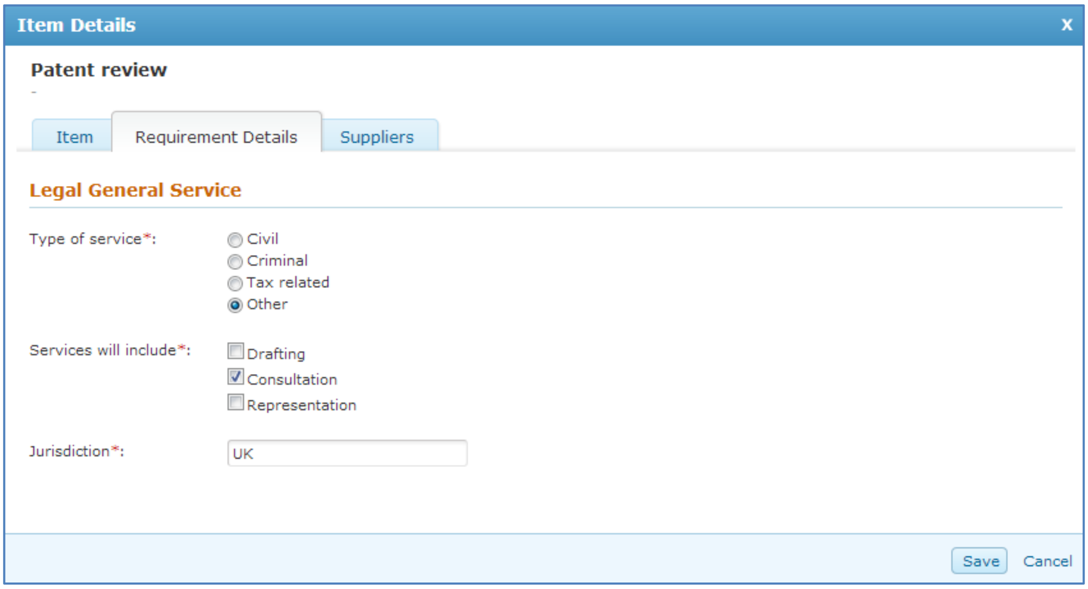


2. Click the **Item Name** (under **Requisition Items**) to view requirement details requested by the requester.

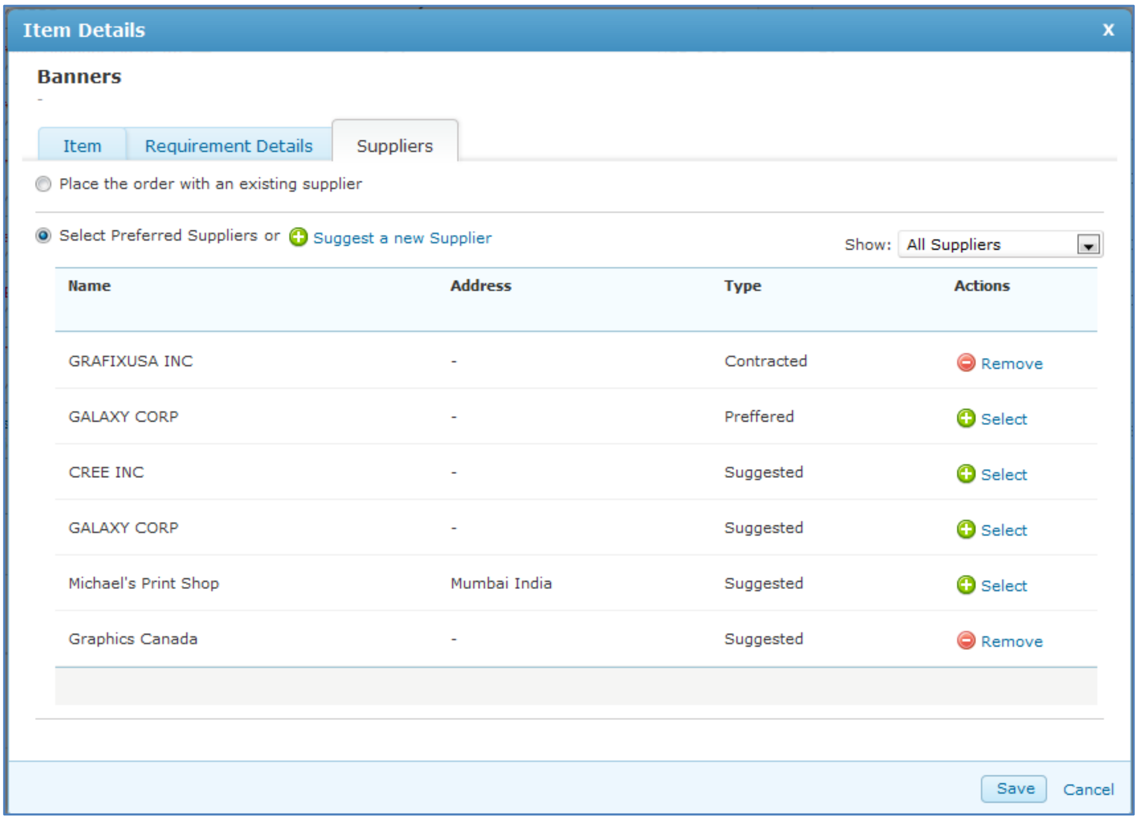
Provide Feedback



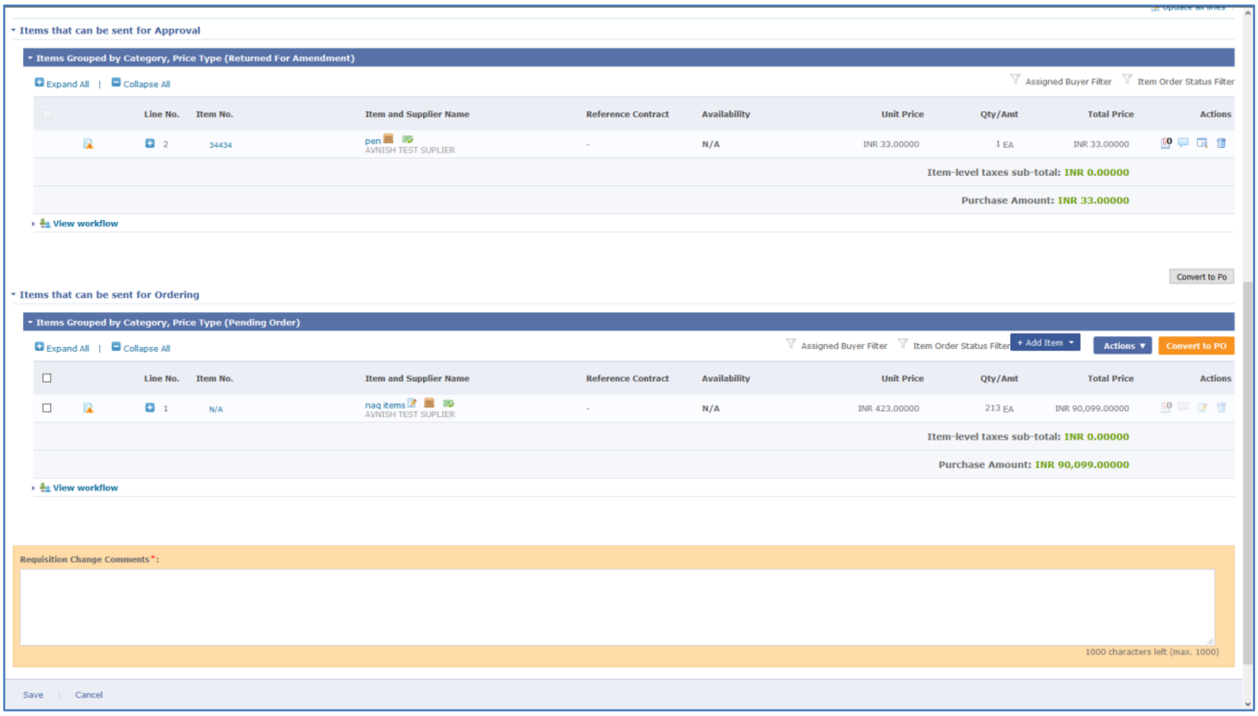
3. Click on the **Requirement Details** tab. Verify the details of the requirements.



4. Click on the **Supplier** tab. Under this tab you will get the list of suggested supplier. In case there are no suggested suppliers for any request, you can suggest a new supplier or enter the supplier name in the **Supplier** drop down menu and select the supplier.



5. After verifying the requirement details, click **Save**.
6. Since the items will be grouped as per the price type or category, you can choose to individually convert the item groups into PO or you can convert all the items groups into PO at once.

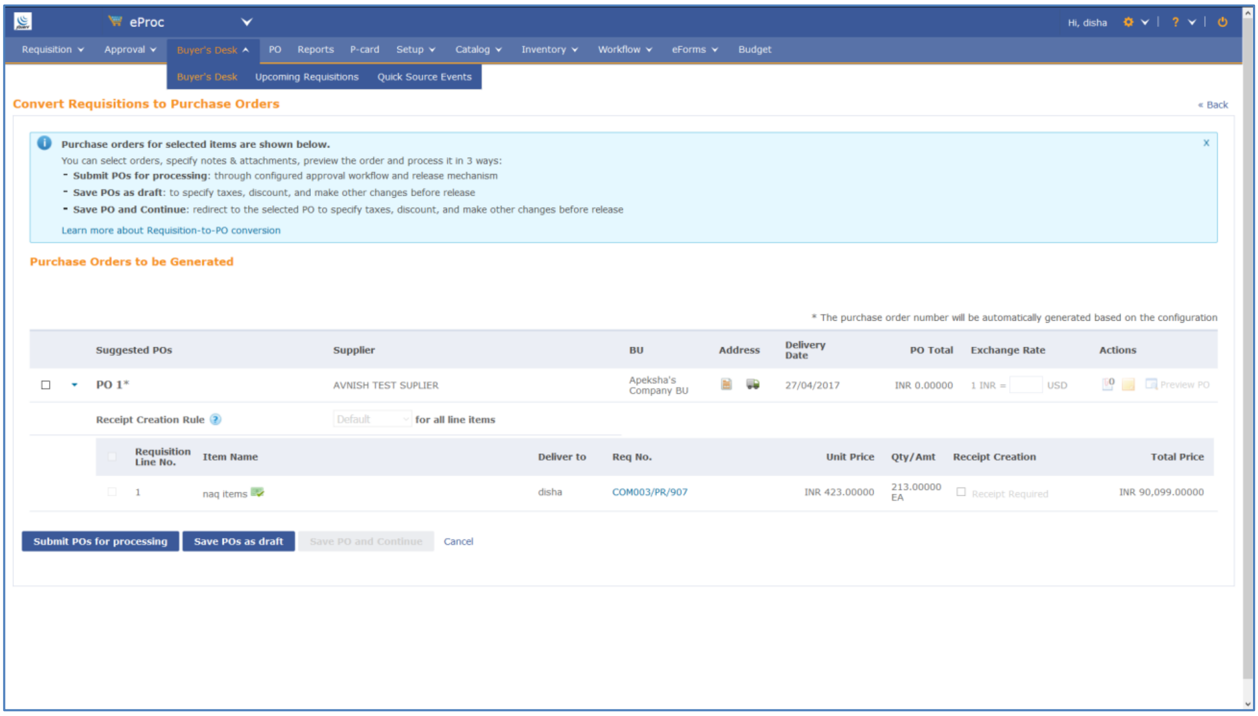


7. Note that in the above image, first item group has been returned to requestor for amendment and the second group is ready to be converted into PO.

8. Click on the **Convert to PO** button to convert the requisition to **PO** (purchase order).

9. Click **Save** to save the requisition for now and convert to PO later.

10. If you click Convert to PO, Convert Requisitions to Purchase Orders page is displayed.



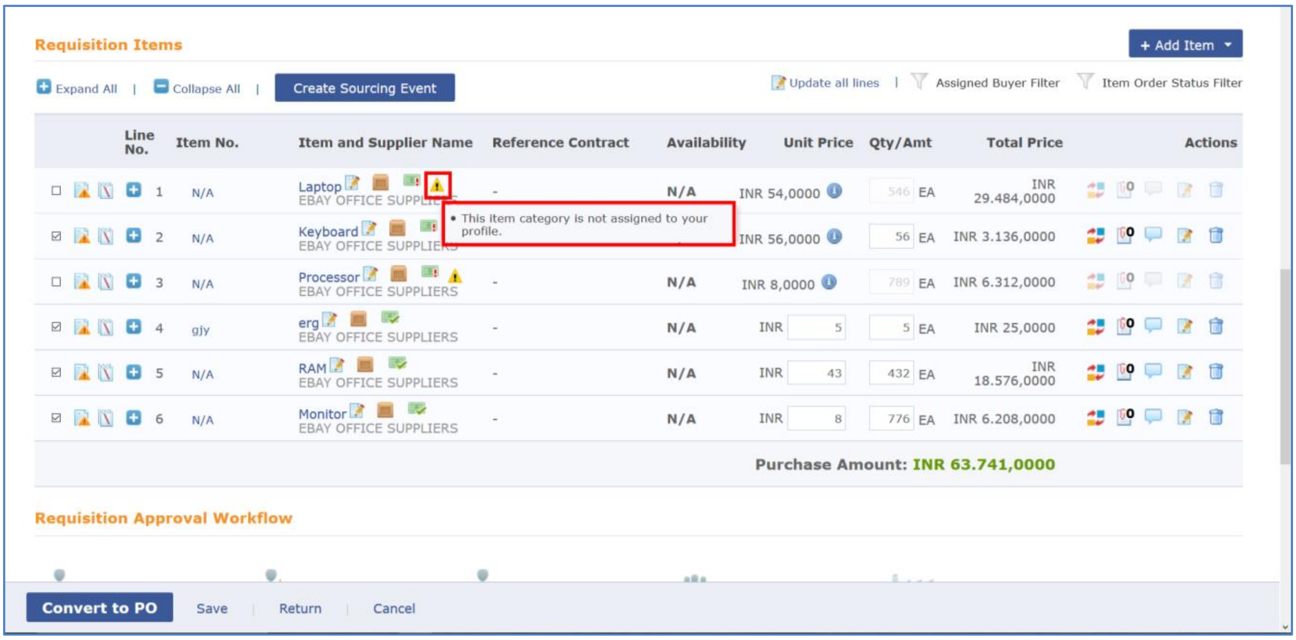
11. Click **Submit POs for processing**.

Note: Based on the admin settings, you will be able to view either the "**Submit PO for Processing**" or "**Save PO and Continue**".

5.7.9.1 Scoping for Buyers

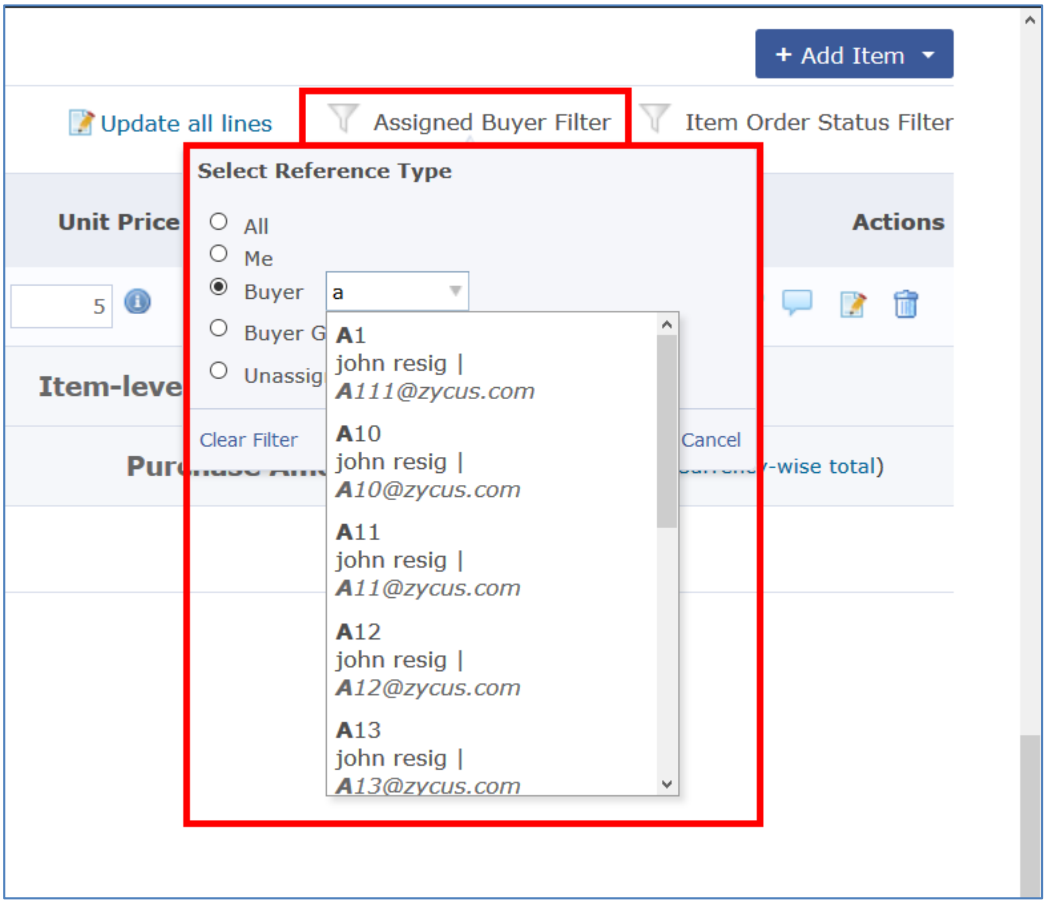
1. In a given requisition, you will be able to process only those line items which are classified under your scope.
2. Based on upon the admin configuration, you might be warned about these line items or you will be restricted to flip the requisition to PO.
3. If the admin has configured to warn the buyer, then as a buyer, you will see following notification message for each line item *(refer the image below)*.

Provide Feedback



4. If the admin has configured to restrict the buyer to flip a requisition to PO, then as a buyer, you will see following error message for each line item *(refer the image below)*.

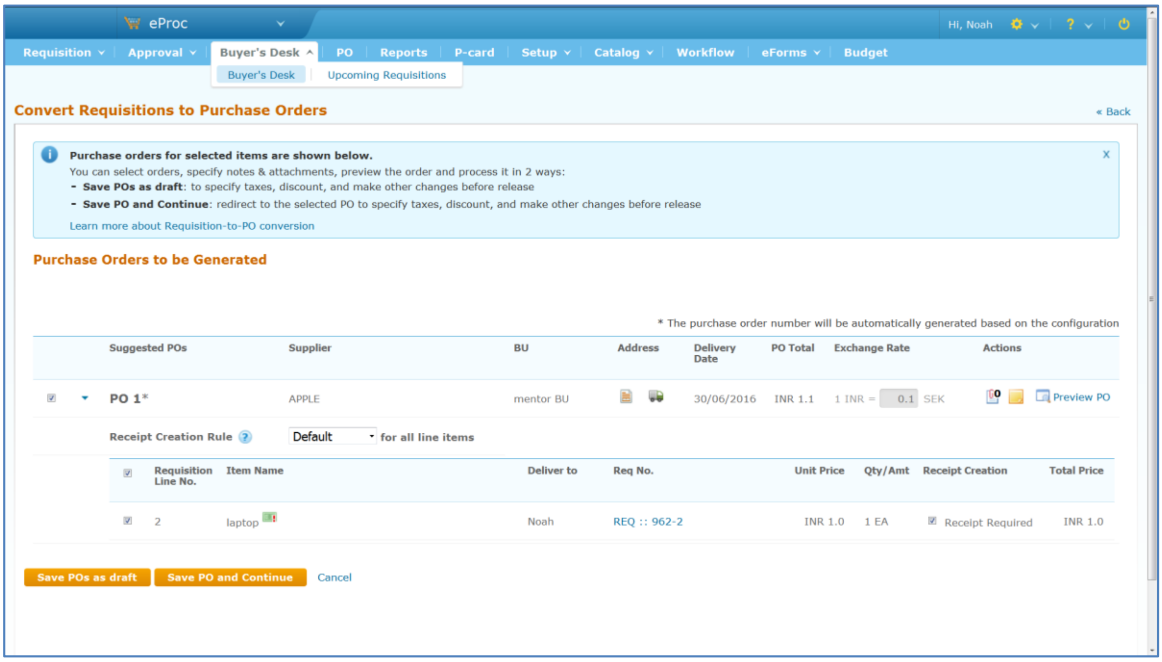
Note: You can filter the items based on the buyer assigned for each line item. Use the Assigned Buyer Filter as shown below:



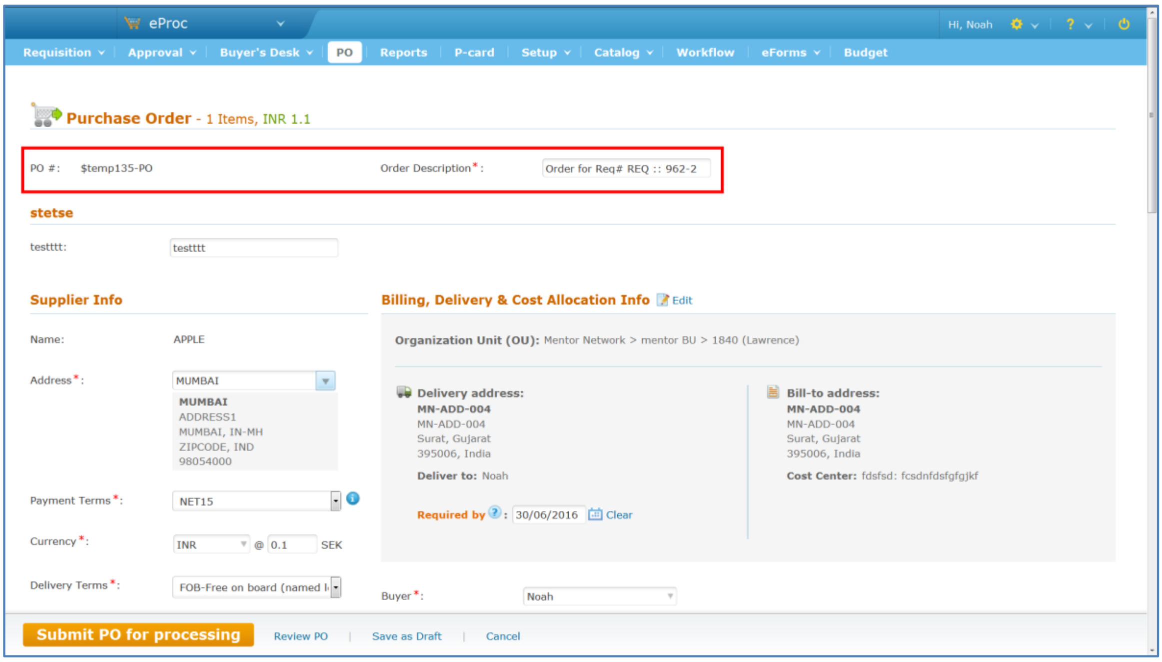
Provide Feedback

Save PO and Continue:

This option will save the current PO as draft and draft PO will open directly without redirecting it to the listings page.



*Click on **Save PO and Continue**, the PO draft page will open:*

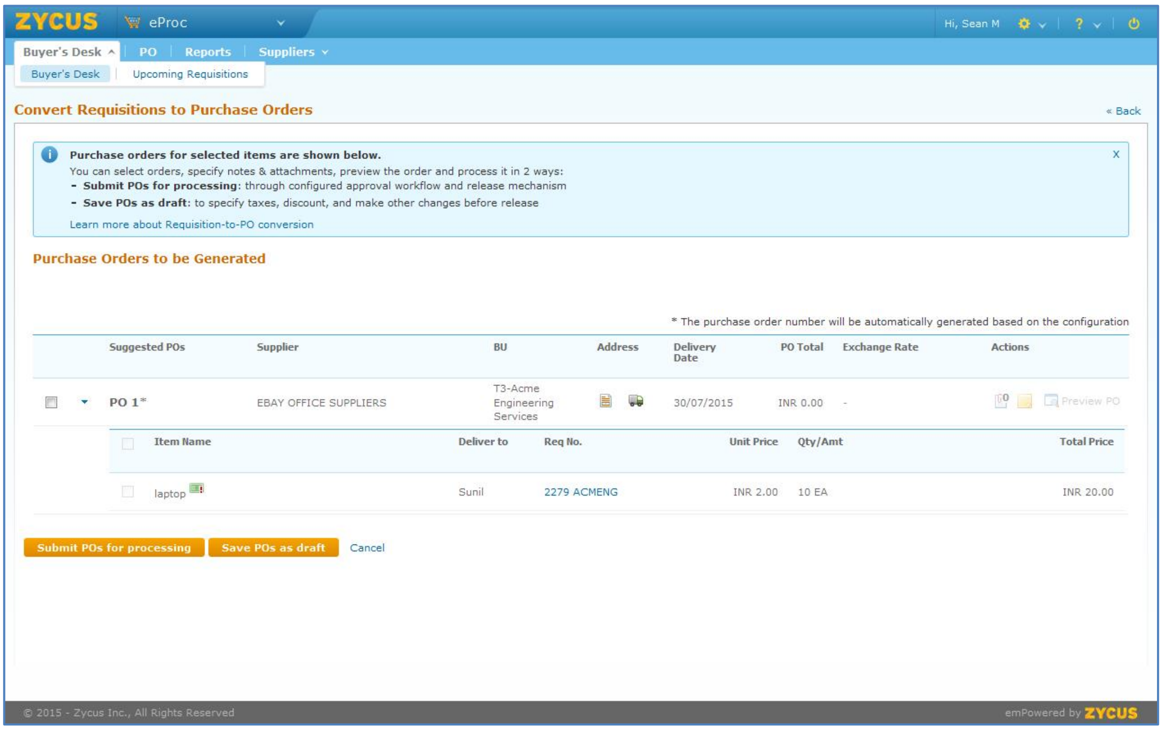


*Make the required changes and click **Submit PO for processing**.*

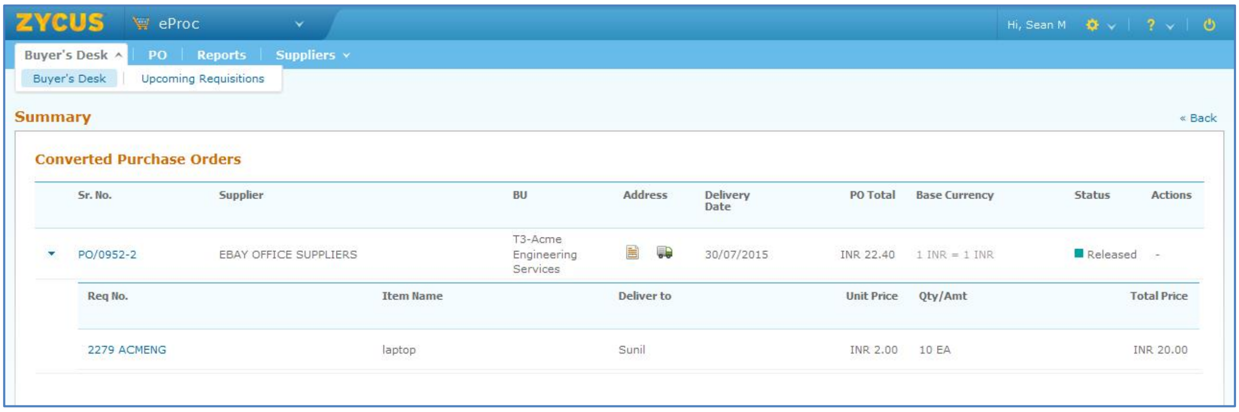
Submit PO for Processing:

This option will allow you to directly submit the PO (converted from requisition) for processing.

Provide Feedback



12. Select the requisition and click **Submit POs for processing**. The following page will be displayed where you will get to view the summary of the PO submitted for processing.



Note: *On Buyer's Desk, if a requisition linked to a purchase order is converted to PO, then the next screen will be the PO Amend screen and the requisition items will be added to PO and the PO can then be submitted.*

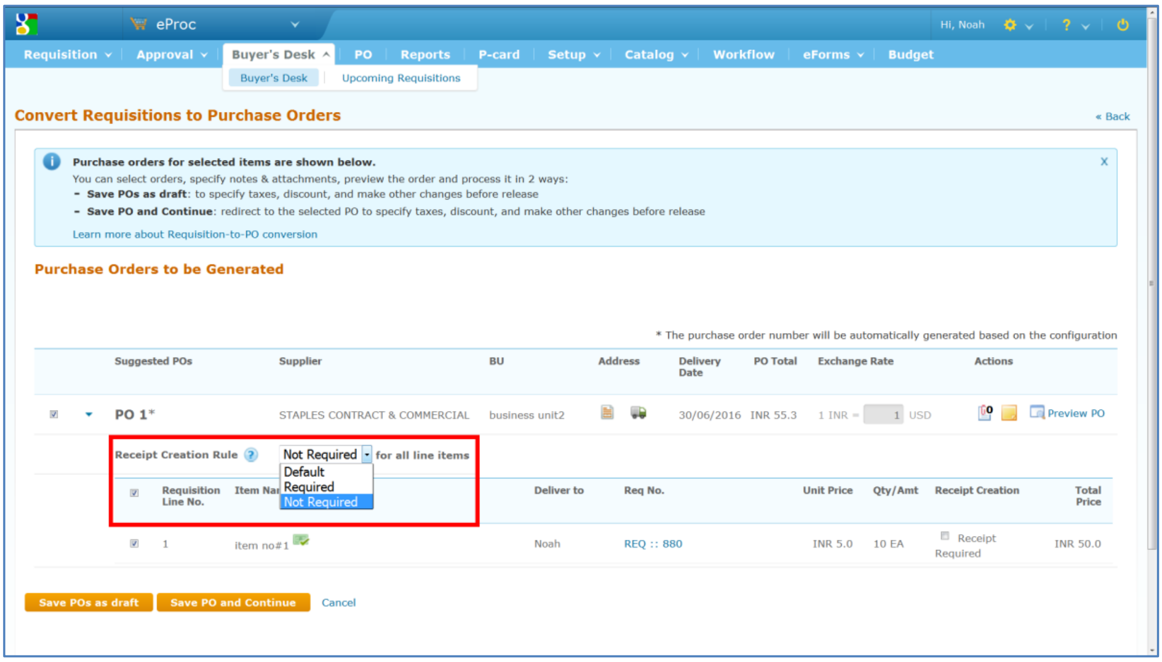
Note: *When converting multiple requisitions to a purchase order, system will generate separate for Project & Non-Project requisitions.*

5.8 Mark PO that does not require Receipt

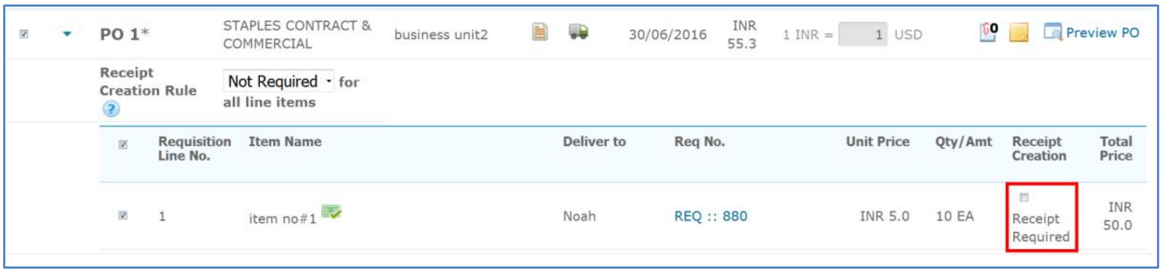
1. Once the process of converting requisition to PO is initiated, as a buyer you can configure the **Receipt Creation Rule**.
2. On the conversion page, select the items which you want to flip into PO.

Provide Feedback

3. You will be able to decide whether you want the receipts to be created:
    - By default for all line items
    - Required for all line items
    - Or not required for all line items

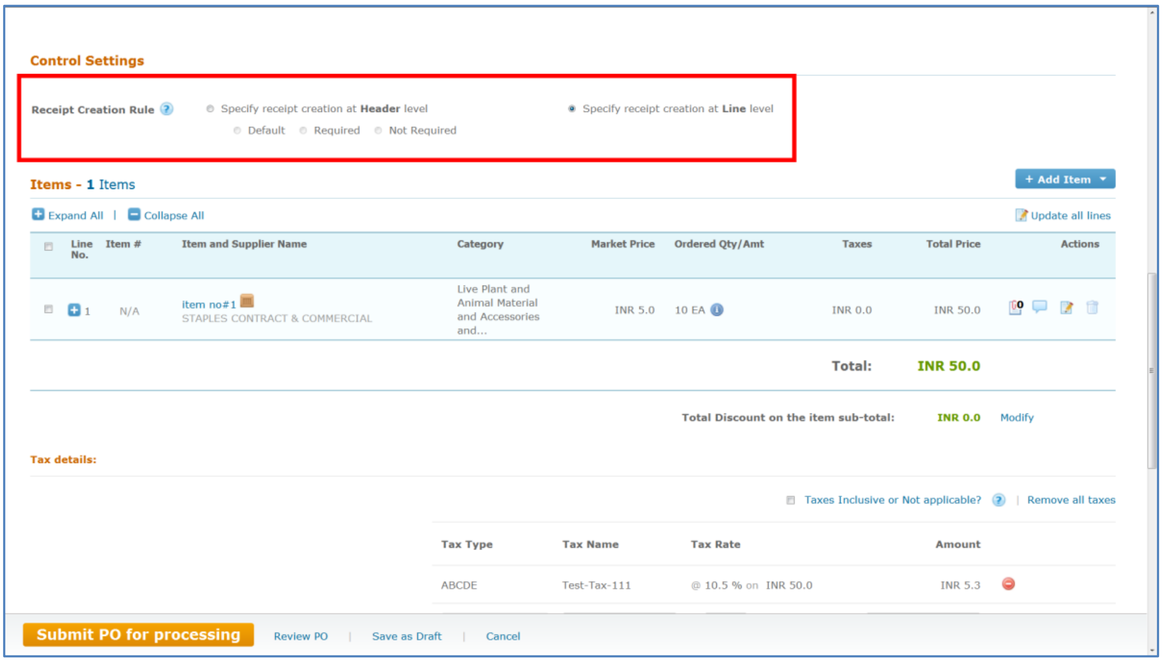


4. Based on the selection of **Receipt Creation Rule**, you will be able to configure receipt requirement for all the line items.

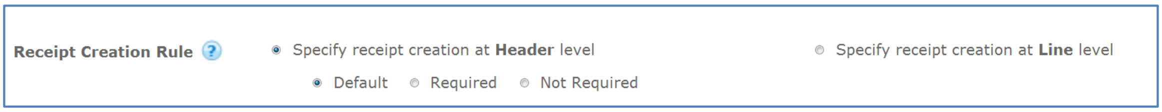


5. Click **Save PO and Continue.**
6. Draft version of that PO will open directly.
7. On the PO draft page, you will have **Control Settings** before the **Item Details** to configure **Receipts Creation**.

Provide Feedback



8. You will have option to **Specify receipt creation at header level or at line level**.

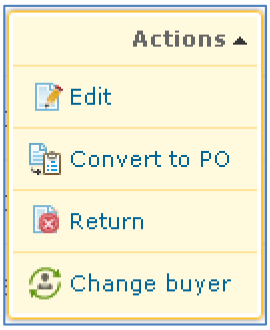


9. For **Header Level**, you can make the receipt creation:
   - Default
   - Required
   - Not required
10. Selecting **Receipt Creation at Line level** will enable creating receipts for all the line items.

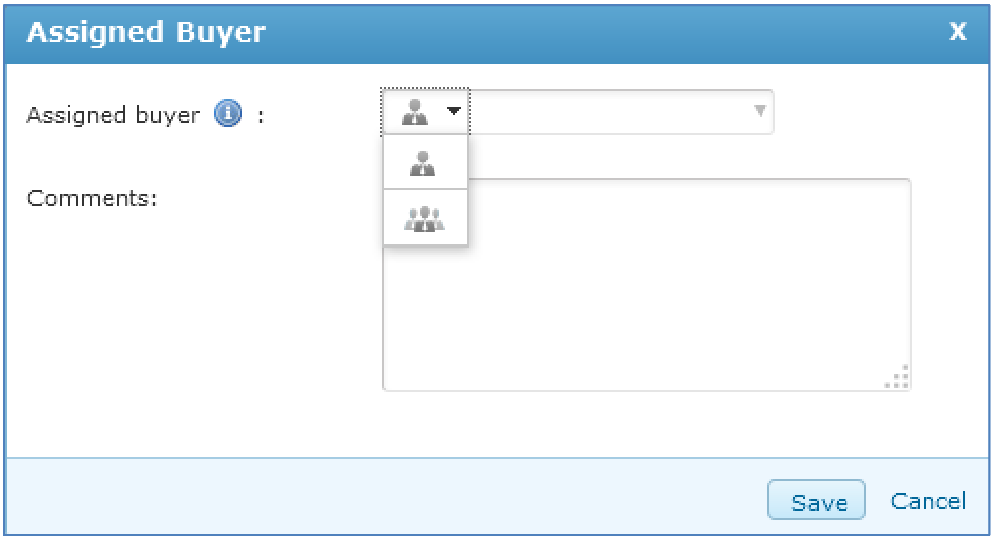
5.9 Changing the Buyer

To change the Buyer for a Requisition on the Buyer's Desk page:

1. For the required requisitions and click on the corresponding **Action** button.



2. Click on the **Change Buyer** option to change the assigned buyer. The following **Assigned Buyer** dialog box is displayed.



3. Enter and select buyer / group of buyers from the auto-suggested options for **Assigned Buyer**.

   a. - Select this option to assign an individual user as the assigned buyer of the requisition.

   b. - Select this option to assign a group of predefined users as the assigned buyers of the requisition.

   Above both options displays the list of only Buyers to be selected.

4. Enter the required comments in the **Comments** box.

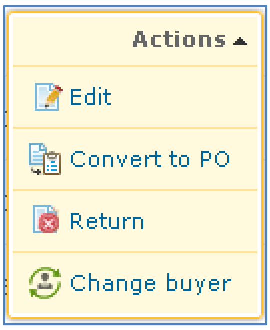
5. Click on the **Save** button to save the assigned buyer.

Note: *While creating a requisition, buyers are assigned at line level. For existing documents, if buyers are assigned at header level, then they will be assigned to all the items within the document.*

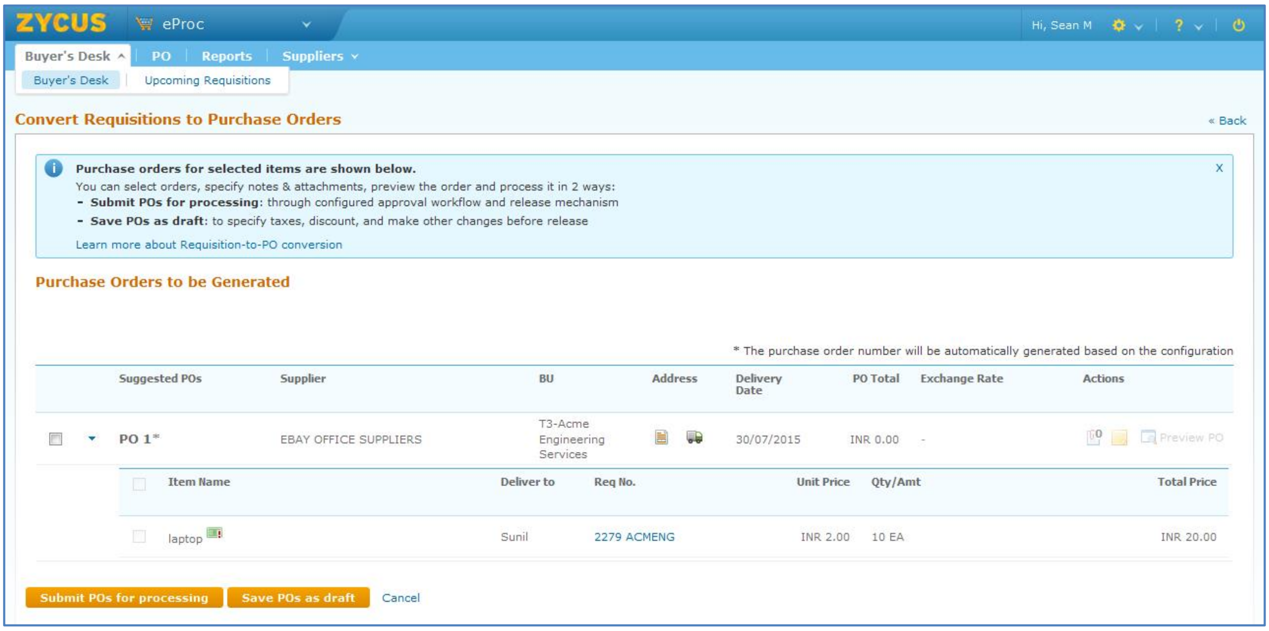
5.10 PO Generation

To generate PO for a Requisition on the Buyer's Desk page:

1. For the required requisitions and click on the corresponding **Action** button.



2. Click on the **Convert to PO** button. The **Convert Requisitions to Purchase Orders** page is displayed.



3. Selected the required PO's from the suggested PO's.

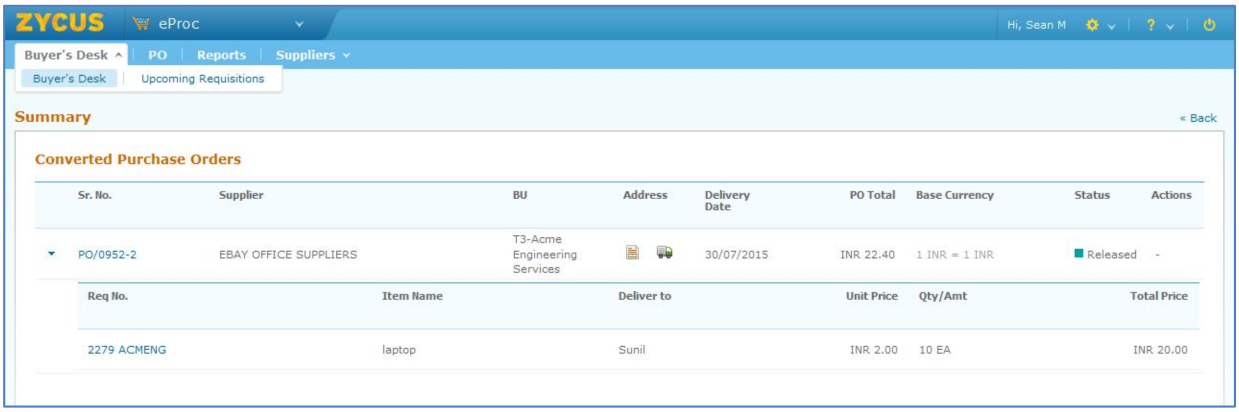
4. Edit the exchange rate if necessary and select the required items for the purchase order.

5. Click on the **Save POs as draft** button to save the PO in draft status.

OR

6. Click on the **Save POs for processing** button to save the PO for processing. The **Converted Purchase Orders** page is displayed with the converted purchase orders.

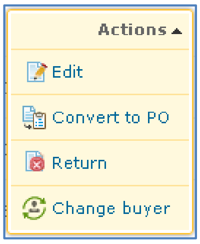
Provide Feedback



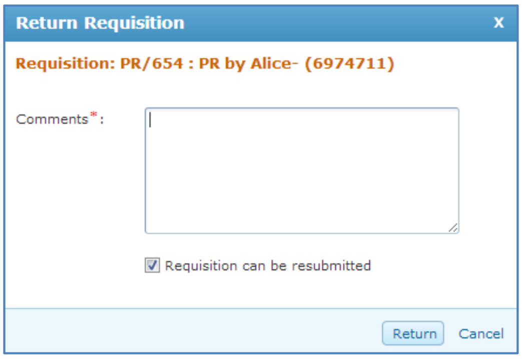
5.11 Returning a Requisition

To return a requisition on the Buyer's Desk page:

1. For the required requisitions and click on the corresponding **Action** button.



2. Click on the **Return** option to return a requisition. The following **Return Requisition** dialog box is displayed.



3. Enter the required comments in the **Comments** text box.

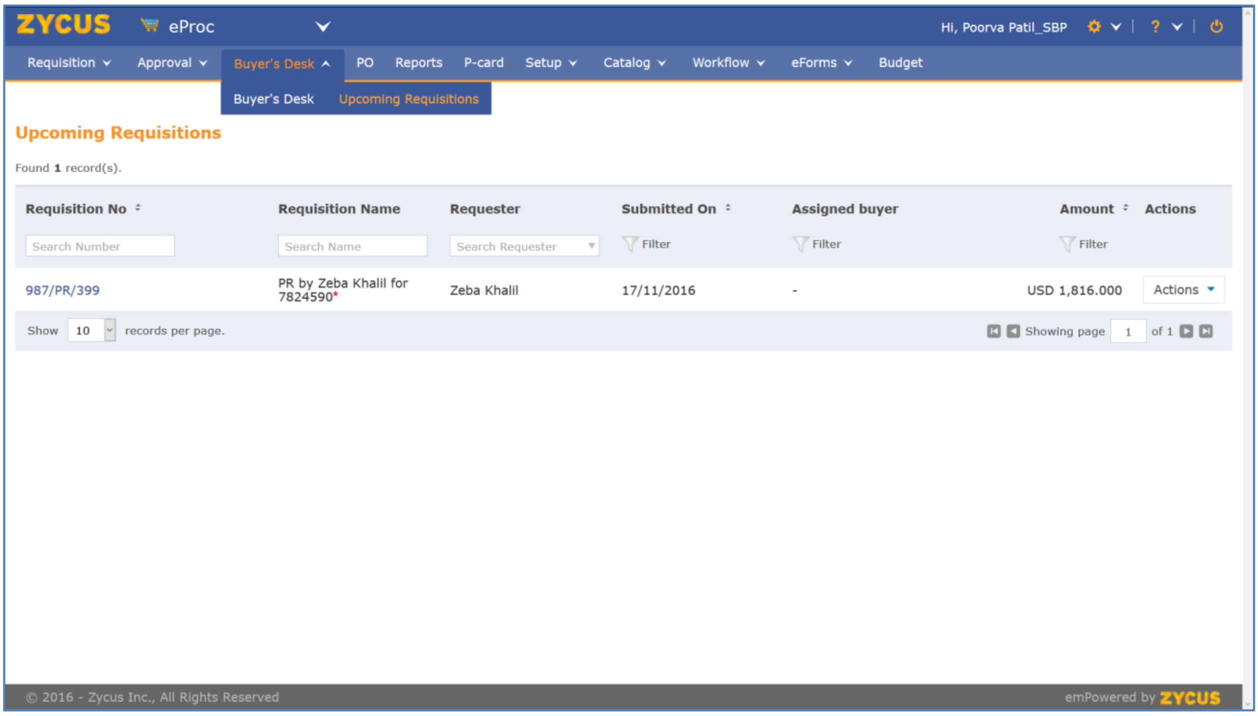
4. Select the **Requisition can be resubmitted** checkbox, if you want the requisition to be resubmitted.

5. Click on the **Return** button to return the requisition.

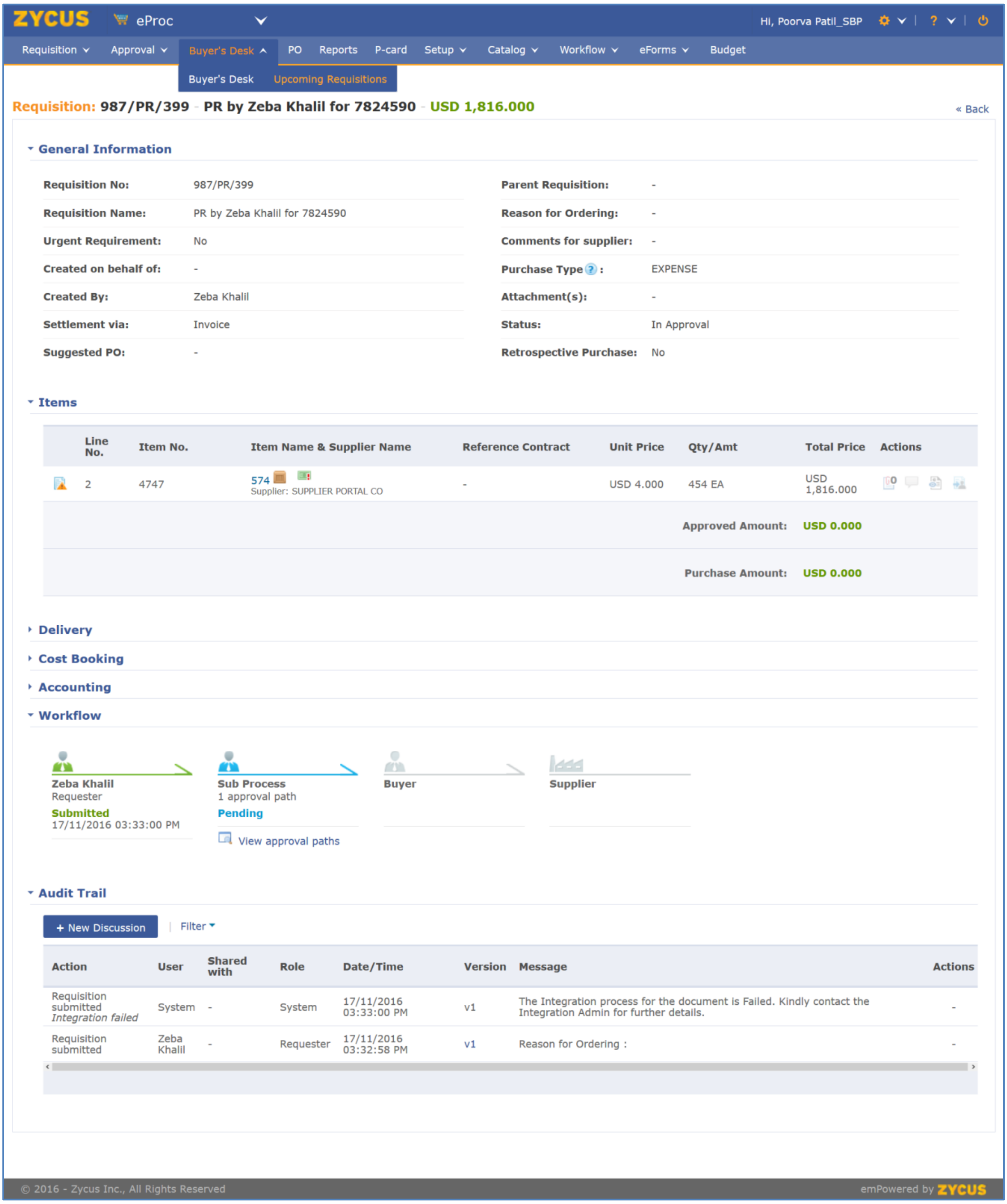
5.12 Upcoming Requisitions

As a buyer, any requisition which contains line items assigned to you as buyer will appear in this tab. All the requisition in this tab will be in approval stage.

1. To access **Upcoming Requisitions**, go to **Buyer's Desk** > **Upcoming Requisitions**. You will land on the following page:



2. All the requisitions in approval stage will appear on this page.
3. You will only be able to view the requisitions on this page.
4. For a given requisitions, click **Requisition No.** or click **View** from the **Actions** drop down menu. You will land on the following page.



5. You will be able to view following details about a requisitions:
   - General Information
   - Item Details
   - Delivery
   - Cost Booking
   - Accounting

Provide Feedback

- Workflow
- Audit Trail

5.13 Buyers Desk: Items

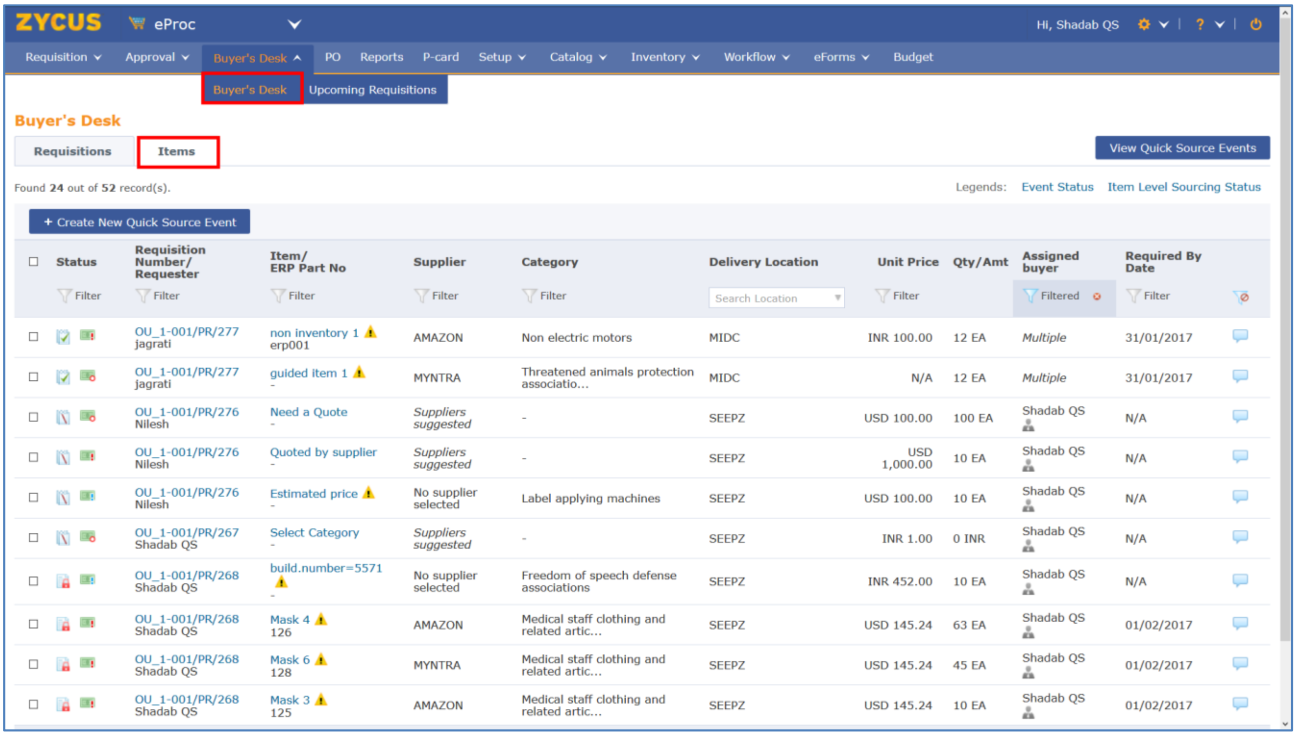
Items tab will list all the items which are part of requisitions. All the items displayed in this section would be the manual items requested, as per scope of the requisitions containing the items.
Buyer will be able to filter out the items based on:

- Sourcing status of the item or sourcing events
- Item Name
- ERP number
- Requester
- Assigned Buyer
- Location
- Required by Date

Buyer can also **view/edit** item level details and add/view item comments.

To access the items listing page:

1. Go to **Buyer's Desk** > **Items** sub-tab as shown below:

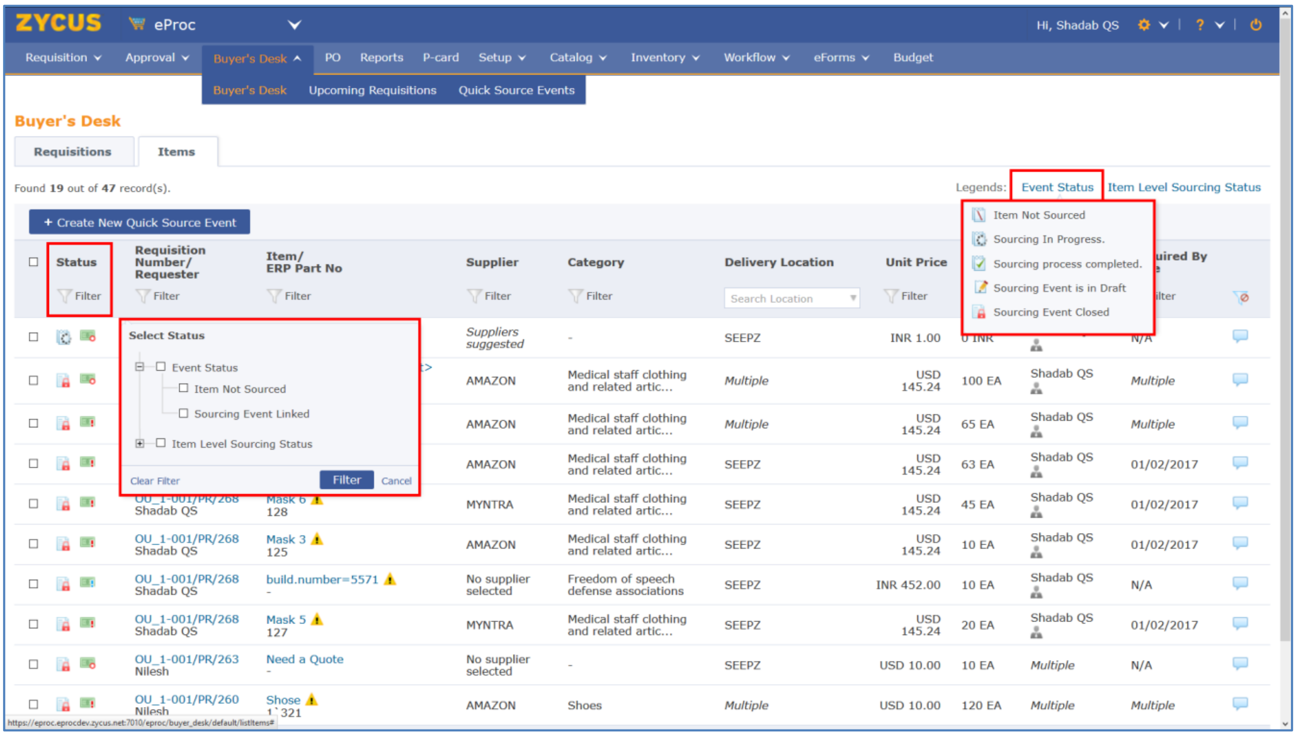


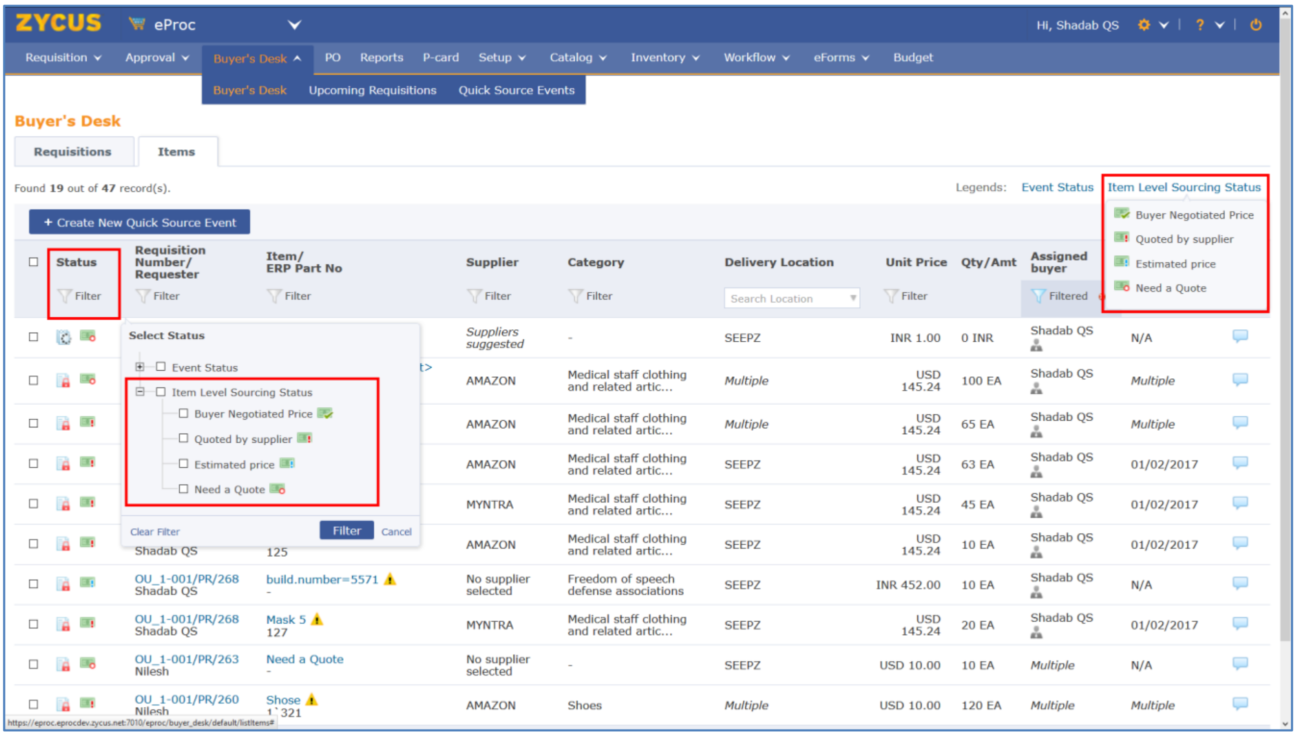
2. Buyer will be able to filter out the items based on:

- Sourcing status of the item or sourcing events

- Item Name
- ERP number
- Requester
- Assigned Buyer
- Location
- Required by Date

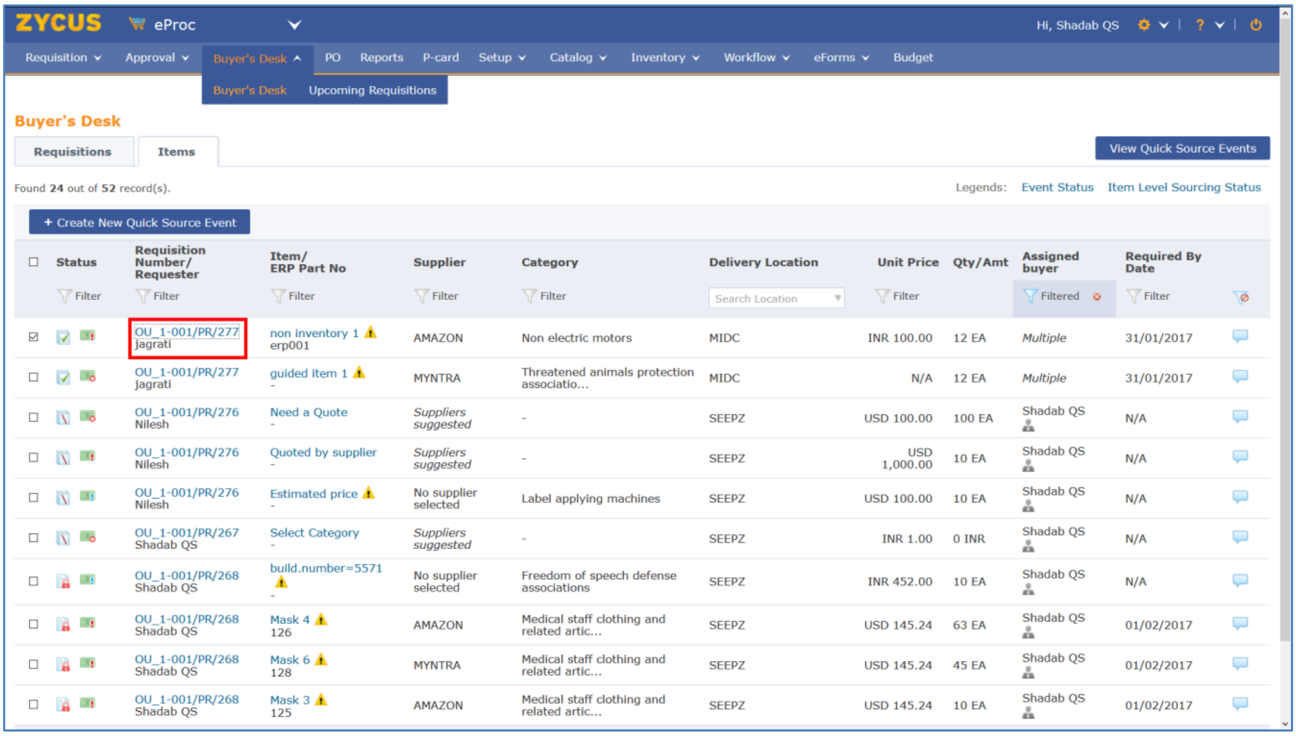
3. Hover over the highlighted links to view the legends for **Event Status** and **Item Level Sourcing Status**.



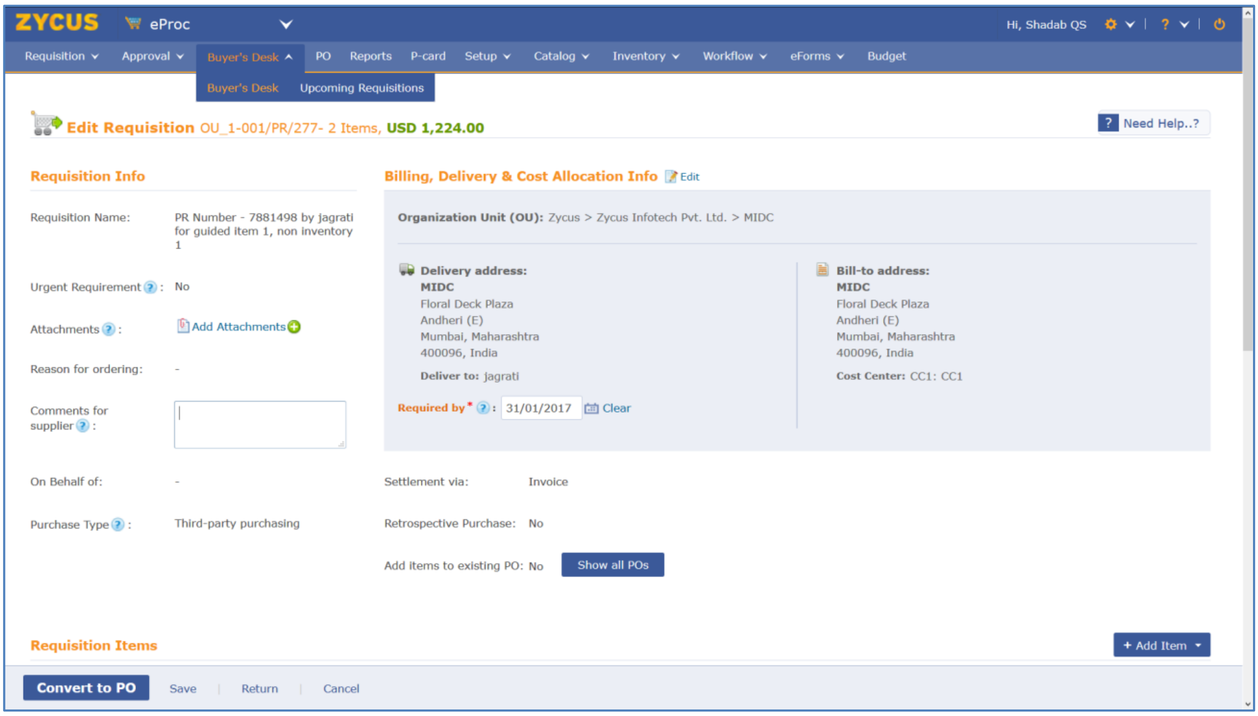


Provide Feedback

4. Buyer can also view/edit item level details and add/view item comments.
5. You can view the requisition number and the requestor to which the item is linked (*refer the image below*).

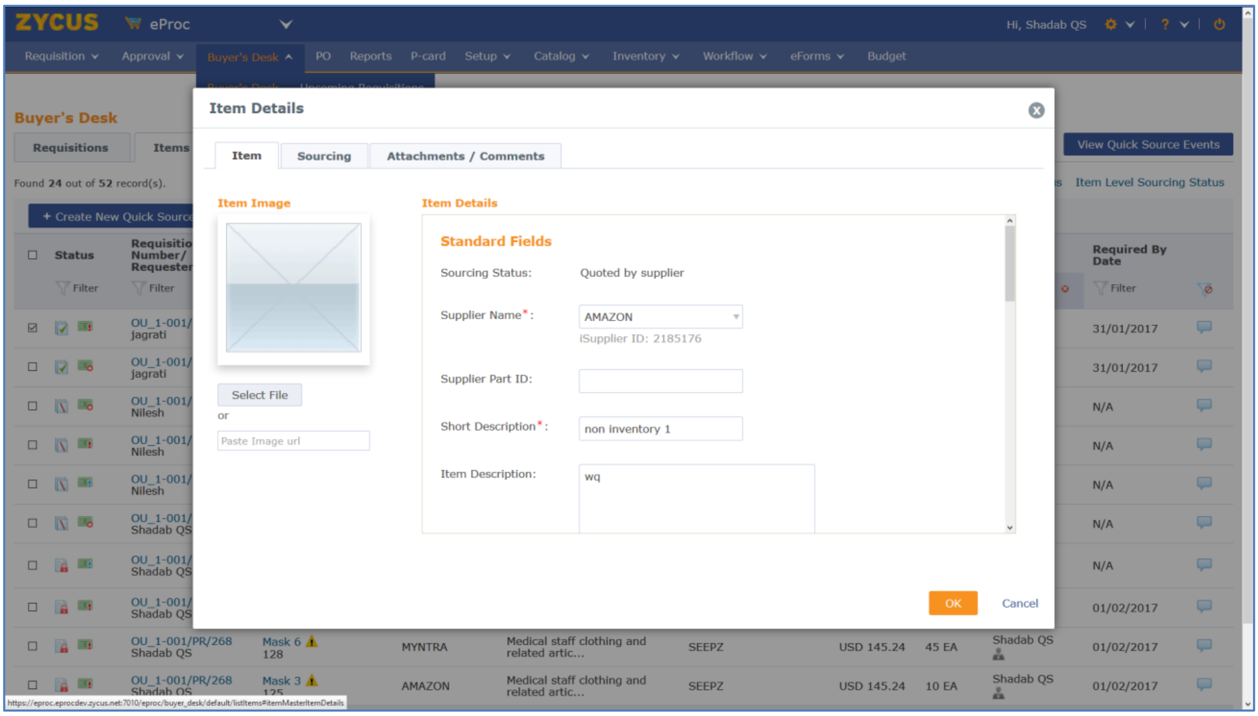


6. Click on the **Requisition Number**, you will be navigated to the linked requisition page as shown below:

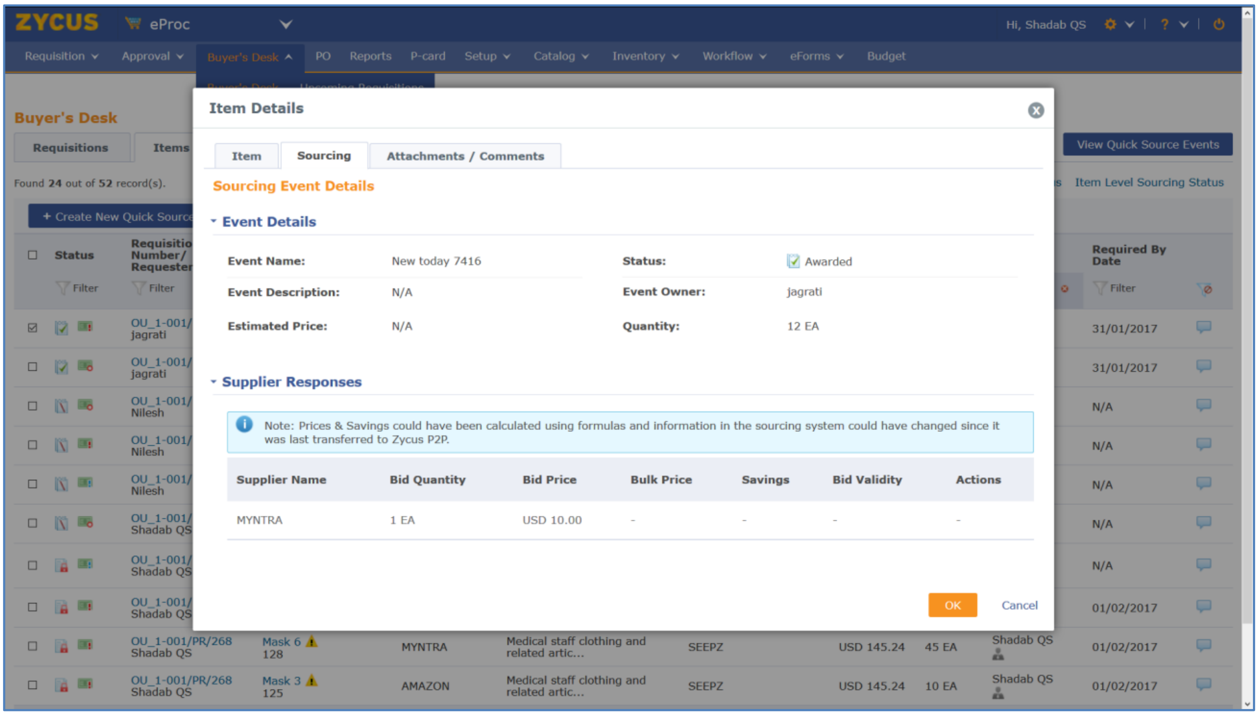


7. Click on the **Item Name** to view all the details. Following popup will appear where you can view the:
   - Item Details:

Provide Feedback



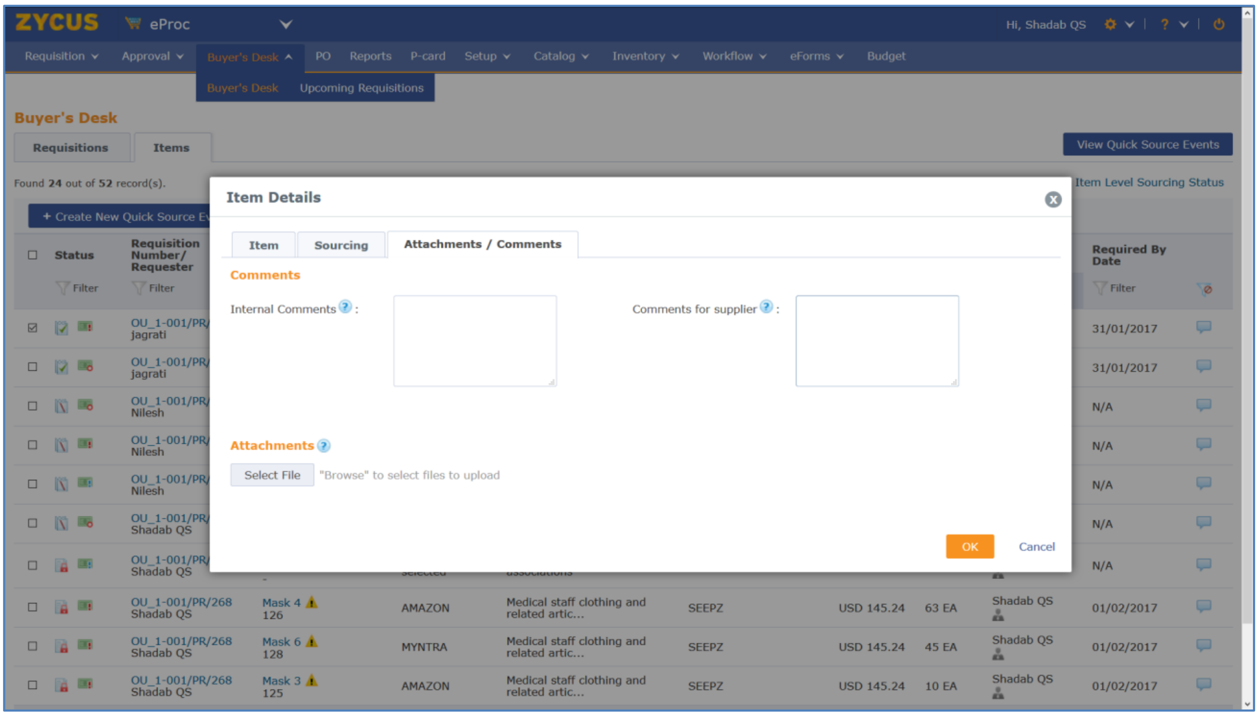
- Sourcing Details:



Sourcing tab will display event details and supplier responses.

- Attachments / Comments:

Provide Feedback



Here you will be able to add comments for internal eProc users and suppliers. You can also upload any supporting documents if required and click **OK**.

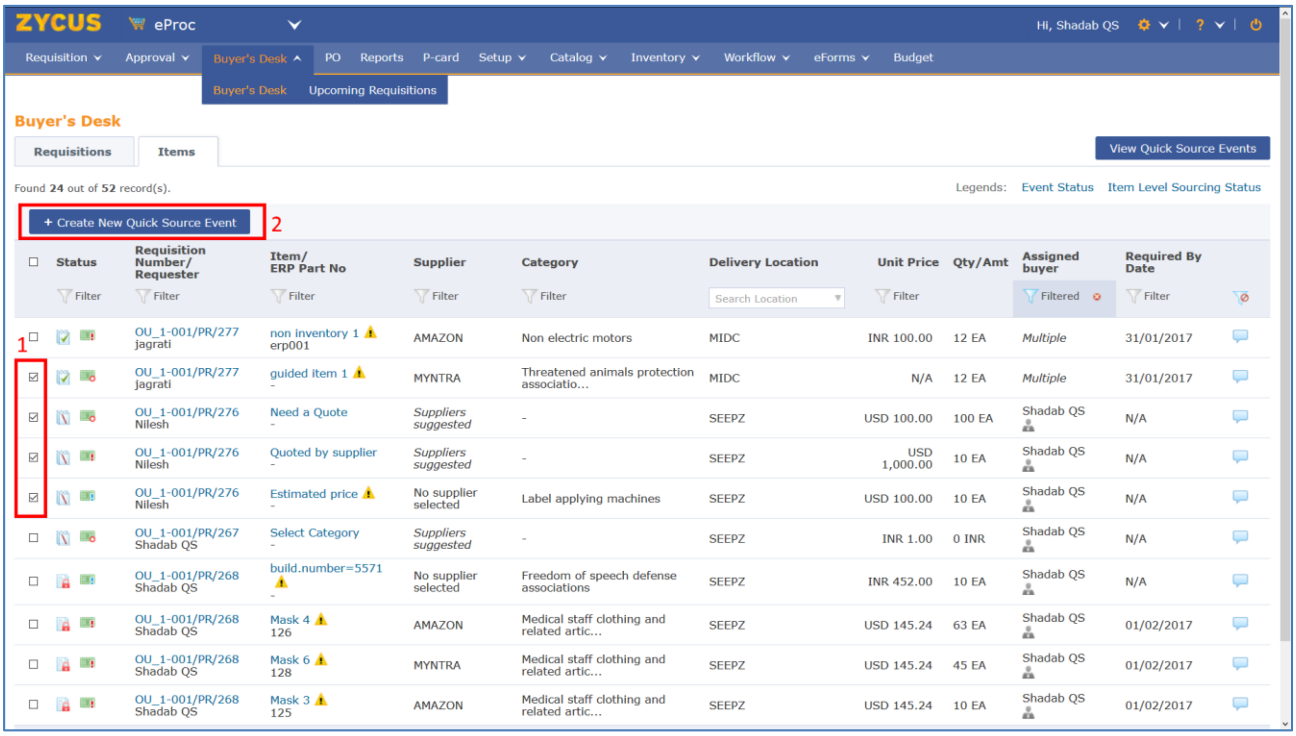
5.13.1 Ability to Create Sourcing Events

You have a functionality to directly create a sourcing event from the Items page.

To create sourcing event:

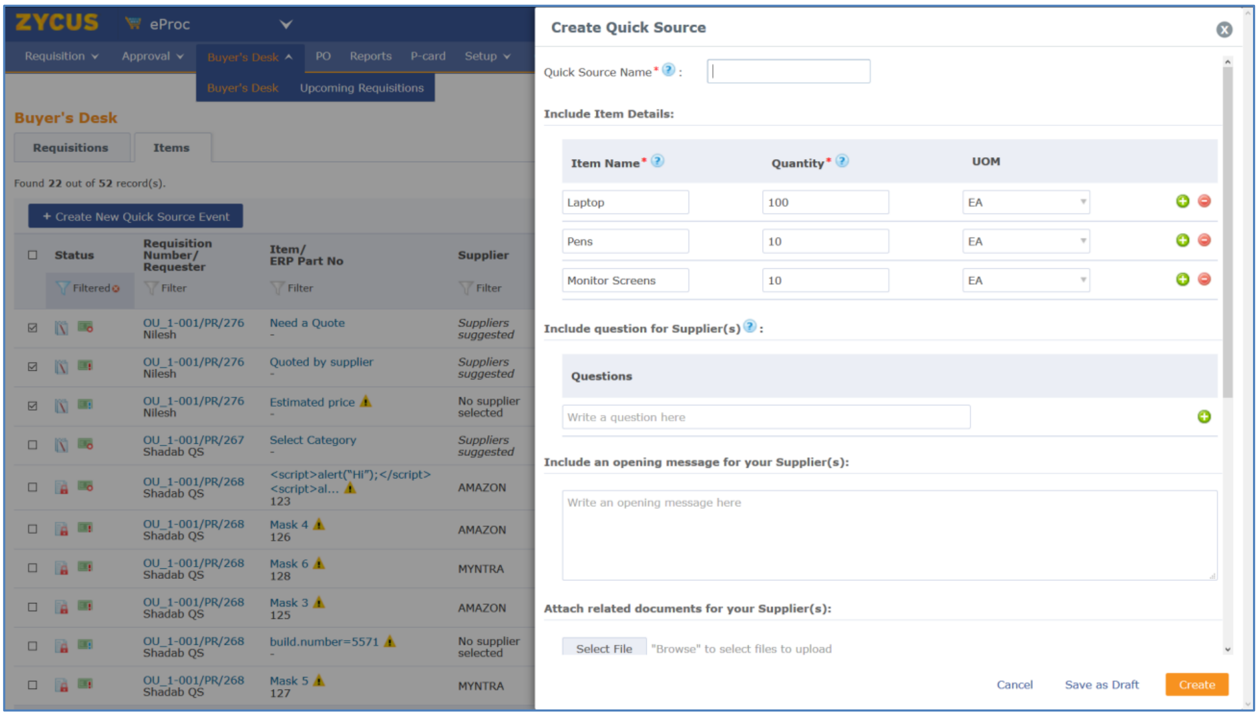
1. Select multiple items from the listing page and click **Create New Quick Source Events**.

Provide Feedback



Note: For easier functioning, filter the events by **Status: Item Not Sourced**.

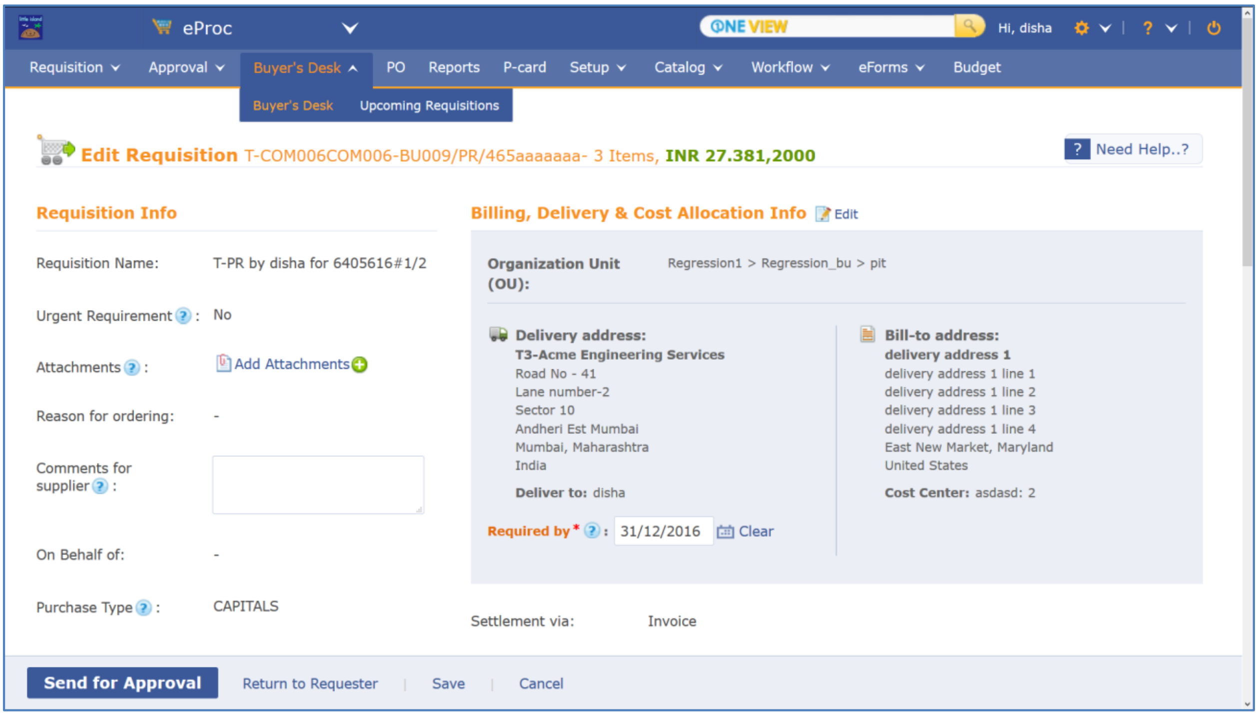
2. QuickSource form will appear as shown below:



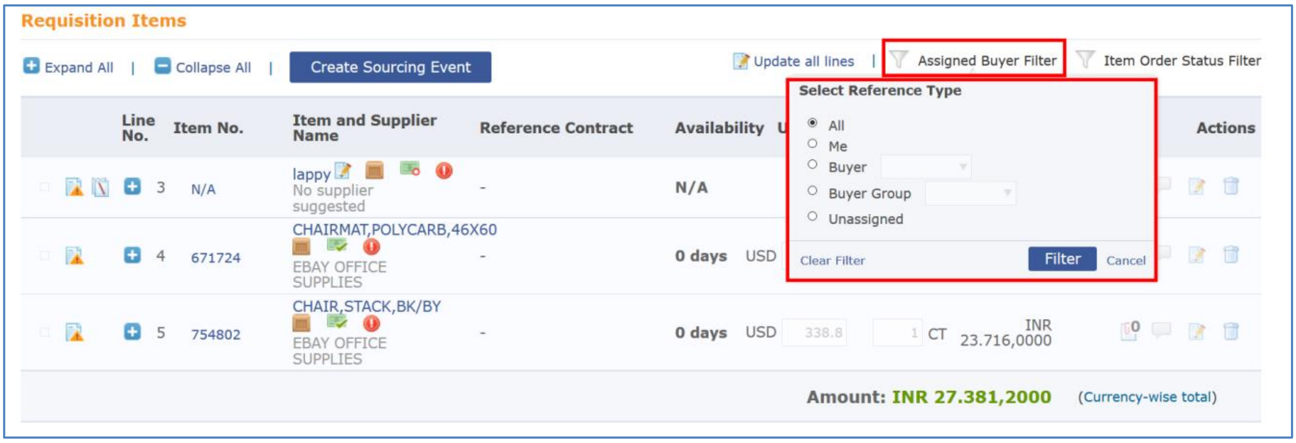
3. Selected items will be appended to the QuickSource event page automatically.
4. Enter the details for the items on the QuickSource form. Refer **Filter Items by Assigned Buyers**

6. Click the **Requisition Number** to view and update the details. The following page is displayed.

Provide Feedback

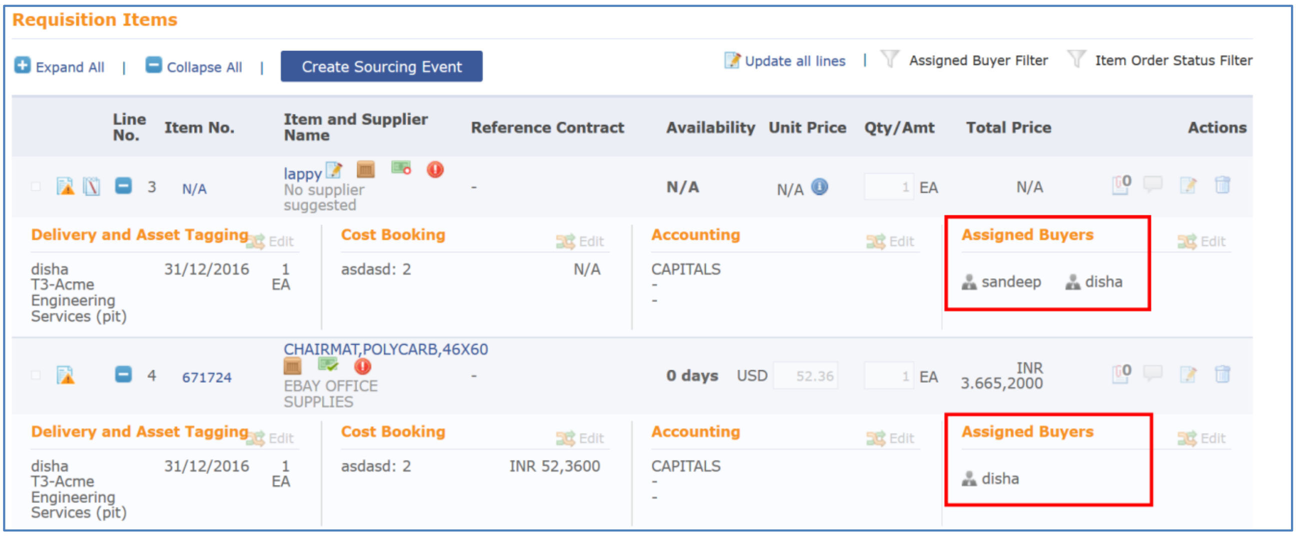


7. Go to **Requisition Items** section. Review all the line items added in the requisition.



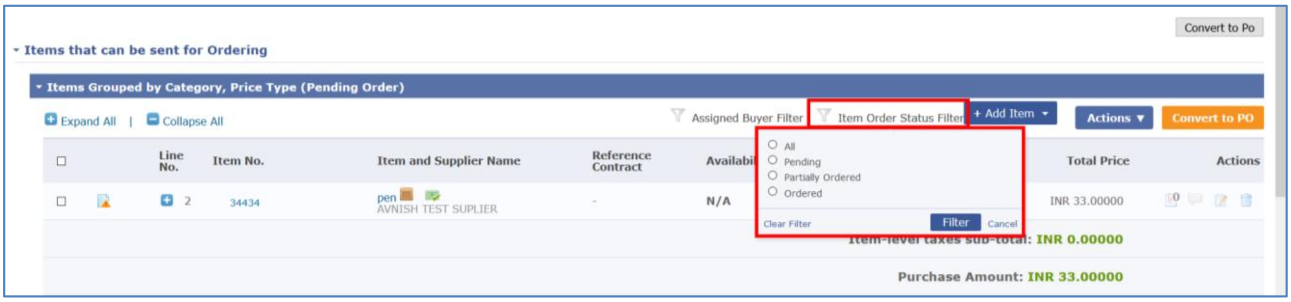
8. You can choose to filter the requisition line items based on the assigned buyer since they are assigned at line level.
9. Click **Assigned Buyer Filter**. You can filter the line items based on following parameters:
   - All: View all the line items, irrespective of the buyer assigned.
   - Me: Line items assigned to me
   - Buyer: Line items assigned to a different buyer (search for the buyer by entering the keyword)
   - Buyer Group: Line item assigned to a buyer group (search for the buyer group by entering the keyword)
   - Unassigned Items: Line items which are not assigned to any buyer.
   - Once you make your selection click **Filter**.
10. You can also view the buyers for all line items by expanding the line item details *(highlighted in the image below)*.

Provide Feedback



5.13.2 *Filter Items by Item Order Status*

1. You can filter for the items based on their order status. Select the status from the options and click **Filter**. The item table will refresh and show only the relevant items.



5.13.3 *Adding Items to a Requisition*

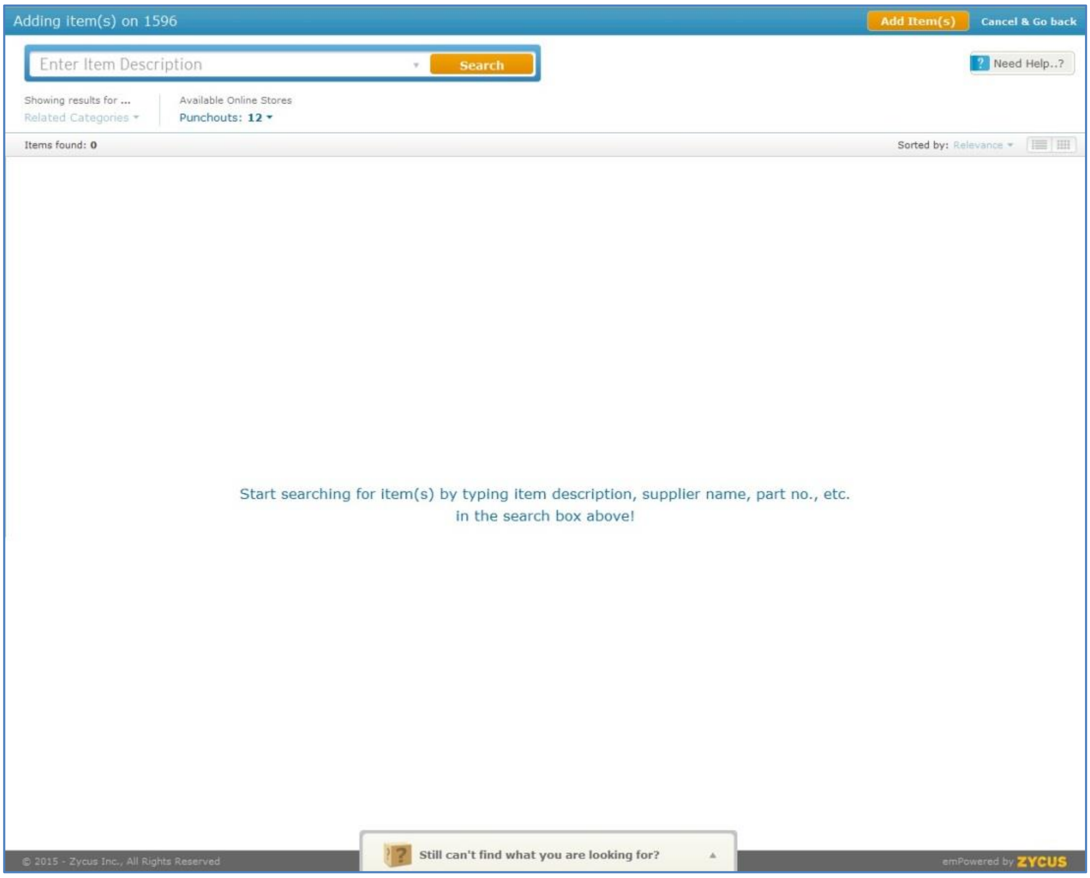
To add items to a requisition on the Buyer's Desk page:

3. Click the **Add Items** to add new items to the Requisition.
4. Select any one of the required options:

a. **Search Items** – Search the existing items & add the required items

i. Enter the name or the description of the item to be search & added.

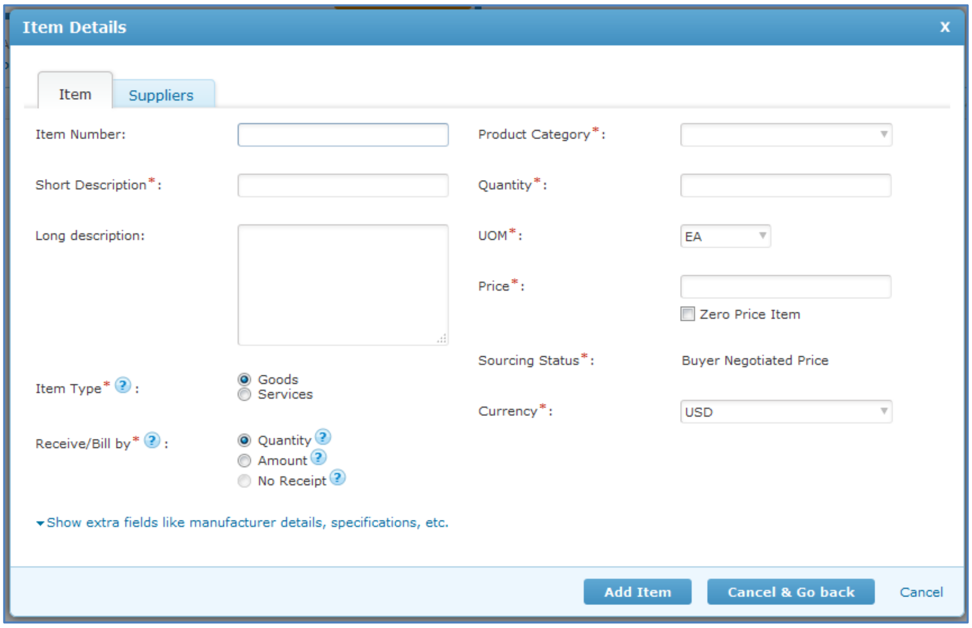
Provide Feedback



ii. A list of items matching the entered name or description is displayed.
iii. Roll over on the **Related Categories** button to view items from other categories.
iv. Roll over on the **Sorted by** button and select an option from the list to sort the items in the list.
v. Click **Switch to Grid View** to view the items as grid.
vi. Select the required items using the check boxes next to them.
vii. Enter the quantity required for the item in the textbox next to the **Item Description**.
viii. Click **Add to Cart** to add the items to the Requisition.

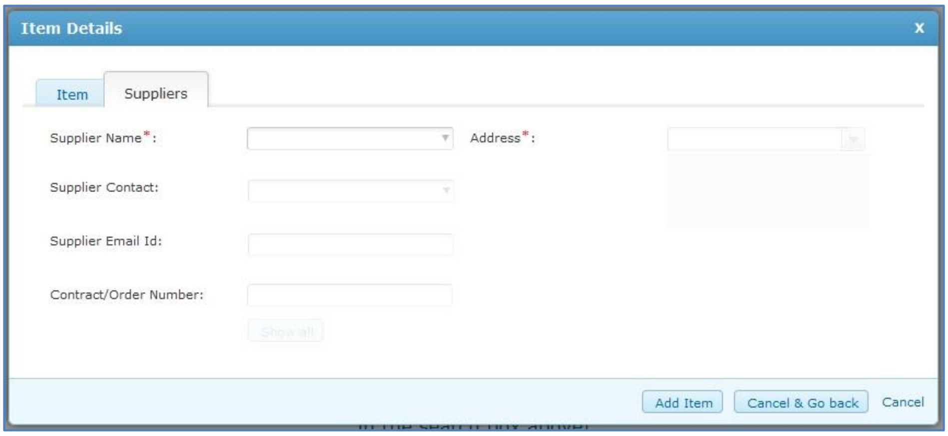
b. **Create a free-text Item** – Create & add the required free-text items

i. Enter the required details in the **Item** tab.



ii. To add information like manufacturer name and so on, click on the **Show extra fields like manufacturer details, specification, etc.** and enter the required details.

iii. Click on the **Suppliers** tab.



iv. Enter the **Supplier Name** and select the required supplier.

v. Select the required supplier address. The rest of the information is auto populated as per availability.

vi. Enter the **Contract/Order Number** or click **Show all** to select an existing contract/order number.

vii. Search & select the required **Blanket Order** or **Contract** as per requirement.

viii. Click **Save** to save the selected **Blanket Order** or **Contract**.

ix. Click **Add Item** to save and add the free-text item.

c. **Punchouts** – Search the existing punchouts & add the required items

i. The available Punchouts are displayed. Select the required Punchout.
ii. You will be automatically directed to the Punchout.
iii. Select and add items to the cart.

Note: *In the punchout cart, you will see items added during that punchout visit along with punchout items added earlier or other items.*

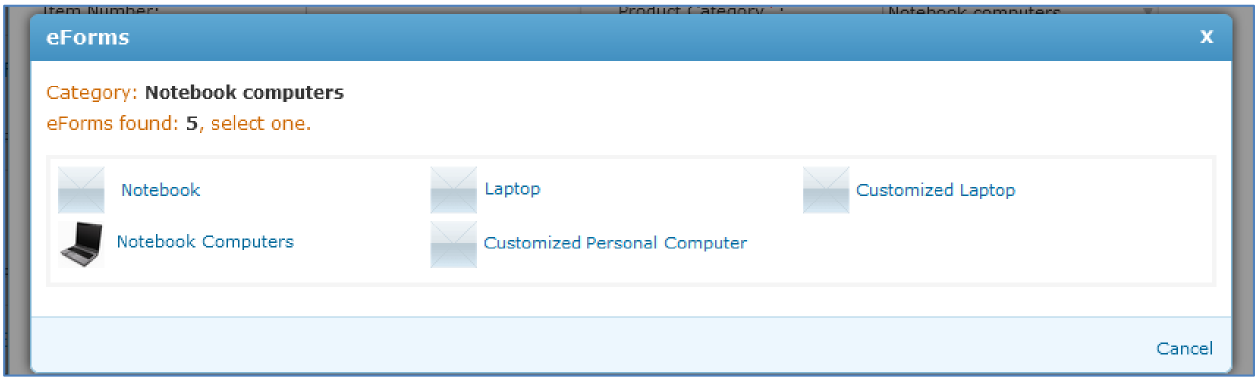
iv. Add the required items from the Punchouts to the cart.
v. Checkout the cart from the Punchout.
vi. All the items from the Punchouts cart will be added to the Requisition.

Note: *The items added to a Requisiton from under the **Buyer's Desk** tab are displayed with a Green Background to classify.*

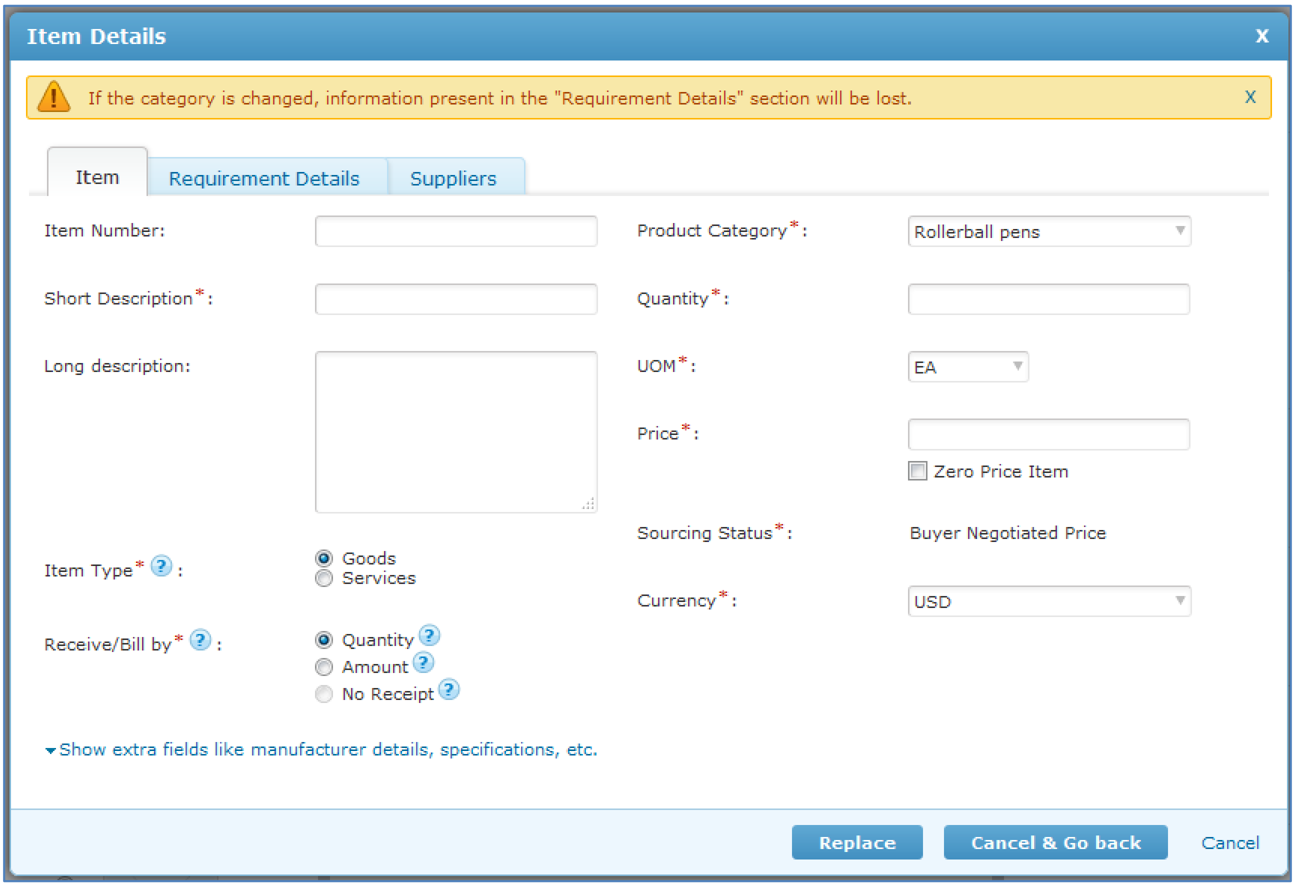
Note: *Items can be added to a Requisiton from under the **Buyer's Desk** tab only if none of the items from the Requistion are ordered OR the Requisition has not been converted into a PO.*

5.13.3.1 Replacing Items in Requisition

12. Click Replace Item icon for corresponding item to be replaced. eForms dialog box is displayed.



13. Click any category to select. The **Item Details** dialog box is displayed as shown below.



14. Enter the **Item Numbers, Short Description** and **Long Description** for the item. The **Product Category** is automatically populated as per the selected category.

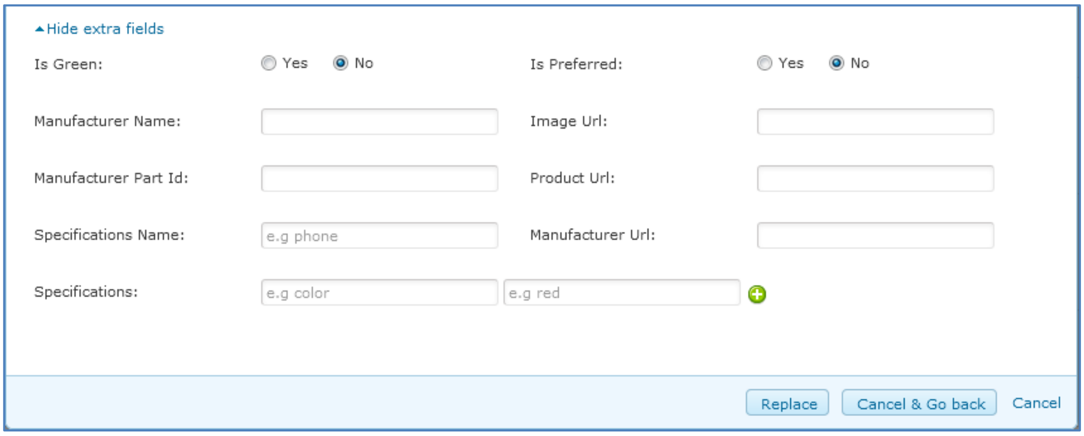
15. Enter the **Quantity**, select the Unit Of Measurement (**UOM**) and **Price** of the item.

<u>NOTE</u>: *Check the **Zero Price Item** in order to add an item with no price or zero price to the Catalog.*

16. Select the **Item Type** (Goods / Services) and select **Receive / Bill By** from following options:

- Quantity - Selected UOM will be used for invoicing and receiving
- Amount - Selected currency will be used for invoicing and receiving
- No Receipt – Selected UOM will be used for invoicing.

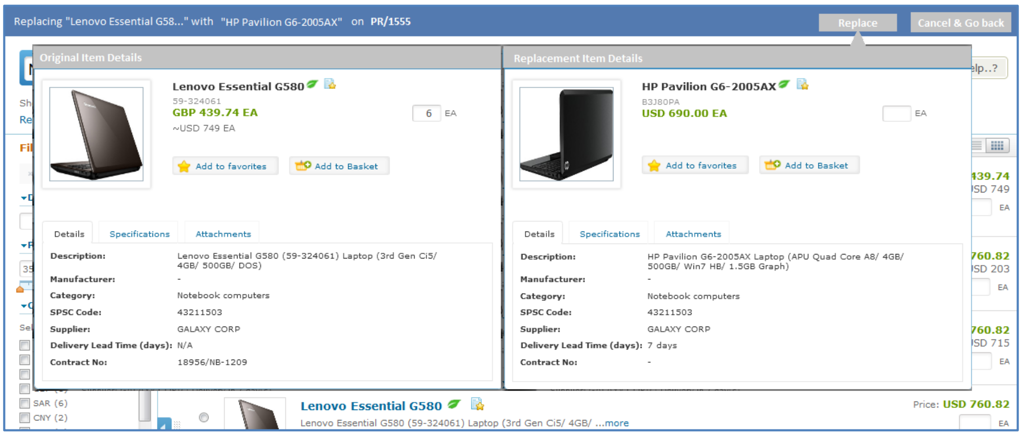
17. Click **Show extra fields like manufacturer details, specifications, etc**. to enter non-mandatory fields related to item as shown below.



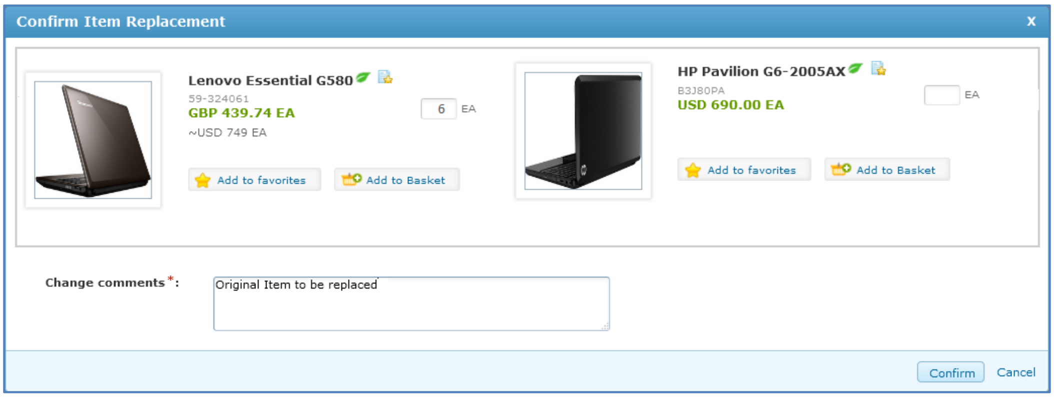
18. Select the appropriate option for **Is Green** and **Is Preferred**. Enter the Specifications Name, the Specifications and click Save.

19. Enter the Manufacturer, Product details and specifications in their respective fields.

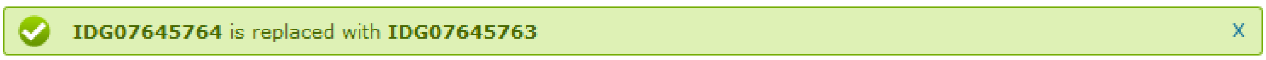
20. Click **Replace** to replace the item with the selected item



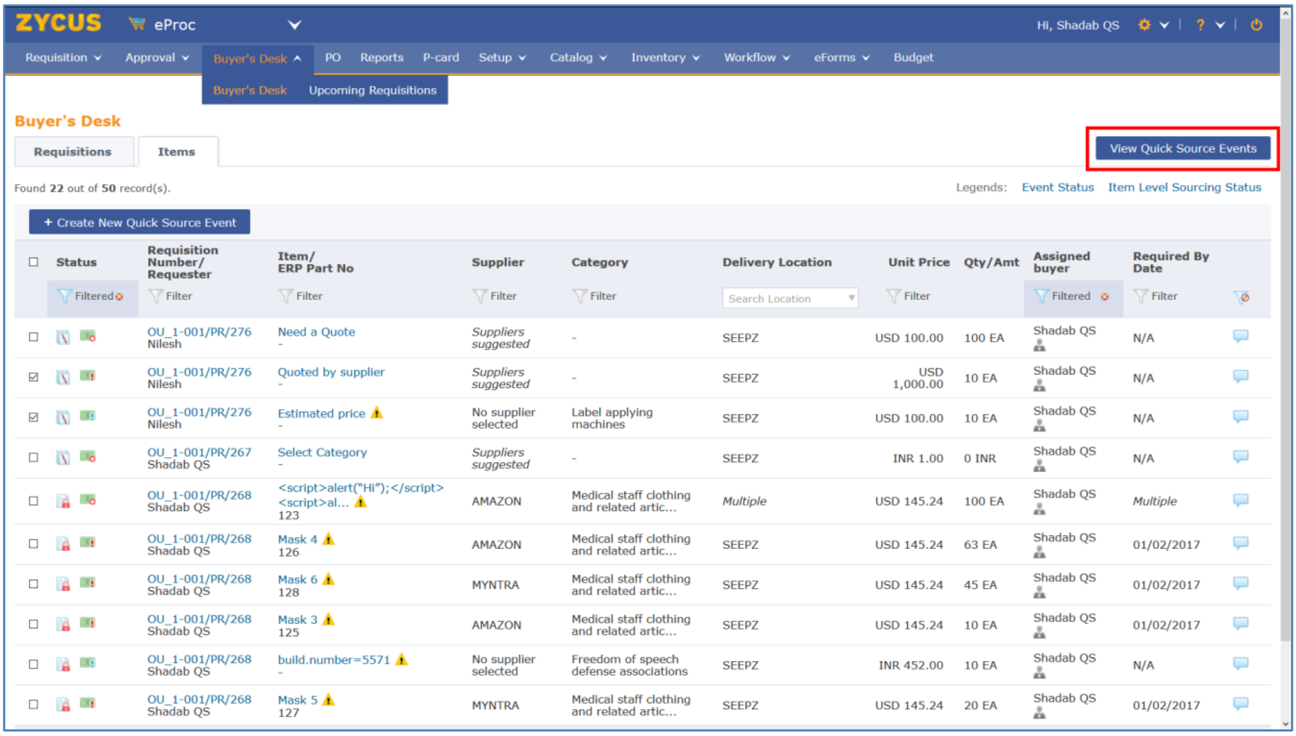
21. Enter the quantity in the **EA** field and click **Replace**.



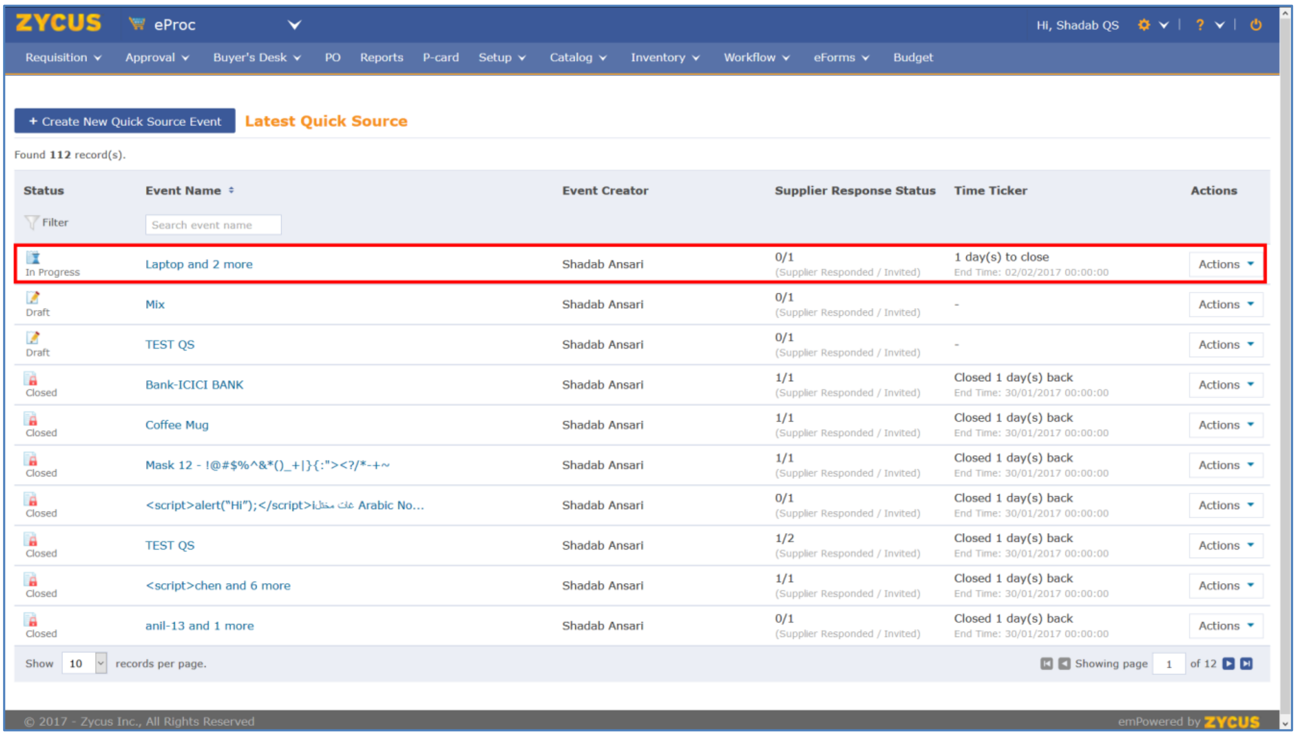
22. Enter **Change Comments** and click **Confirm**. A confirmation message is displayed as shown below.



5. Create New Quick Sourcing Event for more details and publish the event by clicking **Create**. Your event will be published
6. To view your published event, go to **View Quick Sourcing Events** as shown in the image below:



7. Your newly created event will be listed on the following page *(highlighted in the image below)*.



8. To understand the functionalities on this page, please refer **Viewing Quick Sourcing Events.**

Provide Feedback

Chapter 6: Creating Purchase Orders (PO) Manually

6.1 Introduction

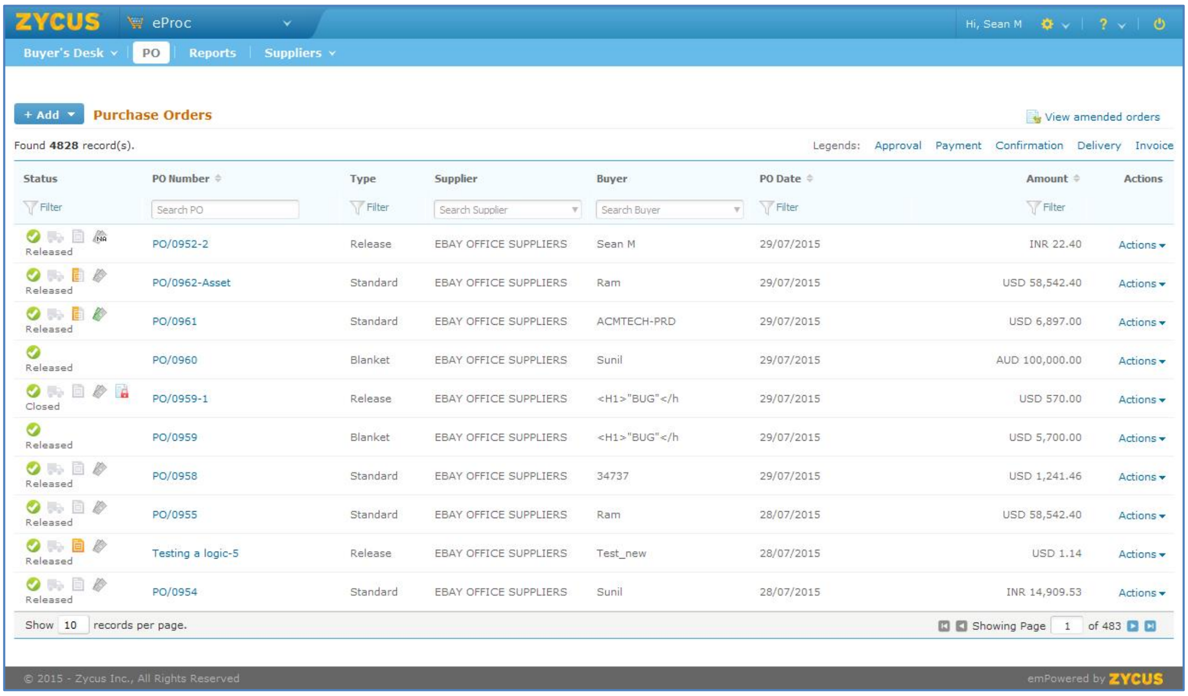
eProc enables to create POs manually in very simple steps with the help of a wizard.

Note: *When requisitions are manually converted into PO, logged in user will be the assigned buyer.*

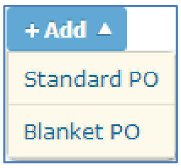
6.2 Creating a PO Manually

To create a new PO:

1. Click on the **PO** tab.



2. Place your cursor on **Add** button; you will get the following options.

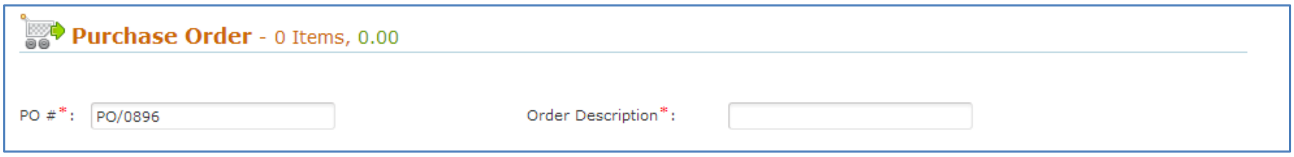


- **Standard PO**: A Standard PO is created for a one time buying process with defined delivery scheduled, goods, and cost.

- **Blanket PO**: A Blanket PO is created for long-term service, maintenance agreements as well as standing orders for goods or services wherein a blanket purchase order uses the same purchase order number for multiple purchases (you can issue a blanket release against the Blanket PO).

6.3 Creating a Standard PO

6.3.1 PO Details



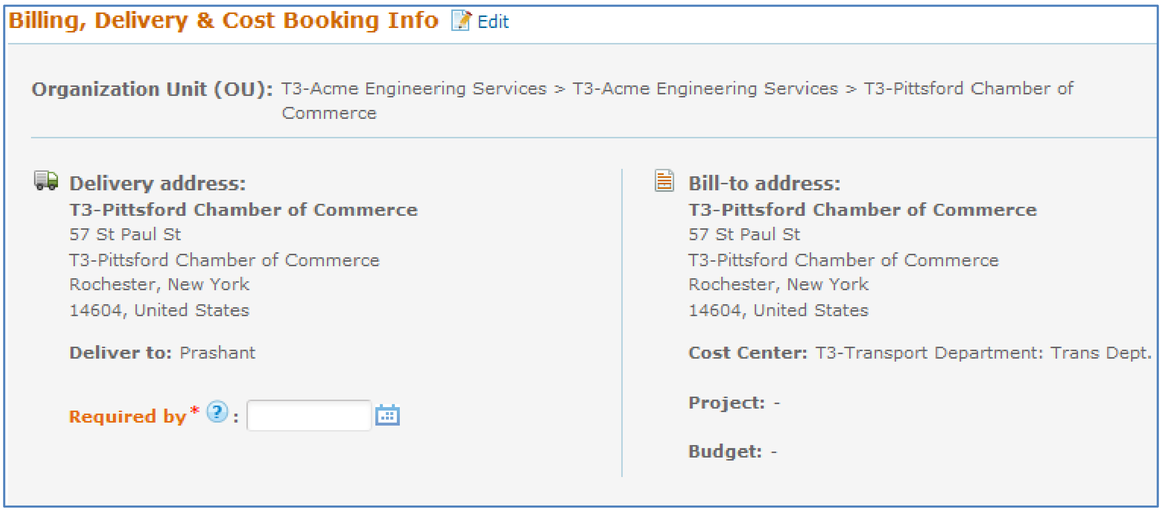
1. The **PO number** is auto generated that can be editable based on administrator settings.

2. Enter Purchase Order description in the **Order Description** field.

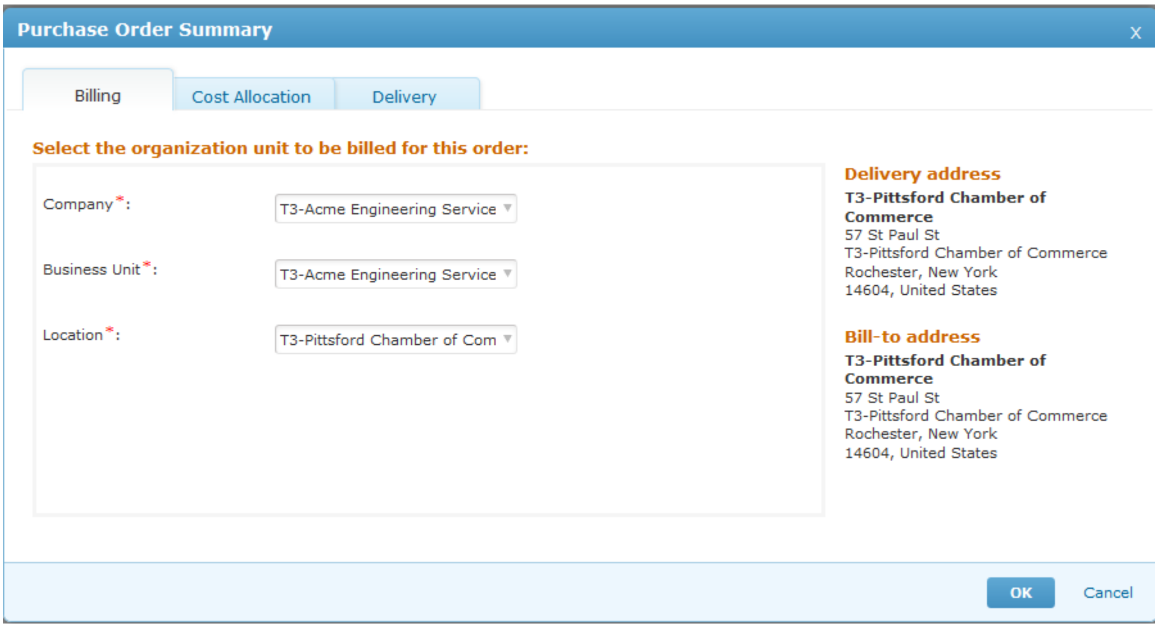
6.3.2 Adding Scope

Note: *The organization unit is pre- populated based on buyer's default scope. Buyer can change delivery and billing addresses by selecting other business unit or location from his scope*

To add a scope:

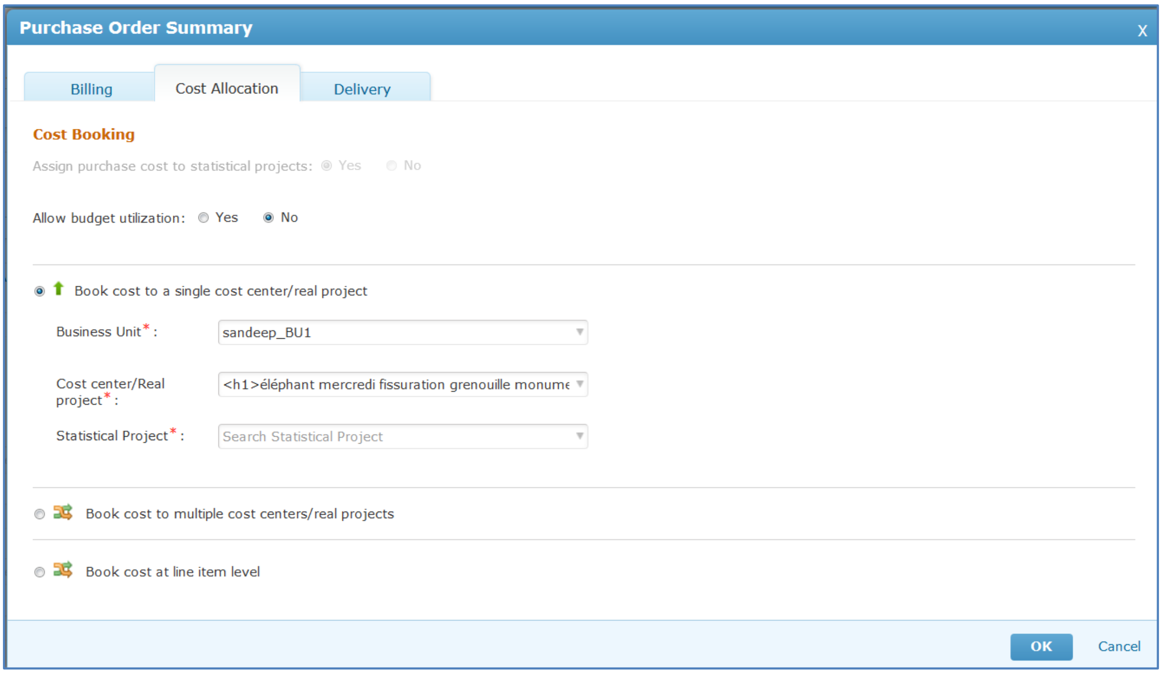


1. Under **Billing, Delivery & Cost Booking Info** click on **Edit**.



2. Under the **Billing** tab, select the location to which the purchase order should be delivered.

3. Click on **Cost Allocation** tab. Under the **Cost Allocation Tab**, the requester will be able to book cost to a single or multiple Business units like other Cost Booking parameters for a Purchase Order.



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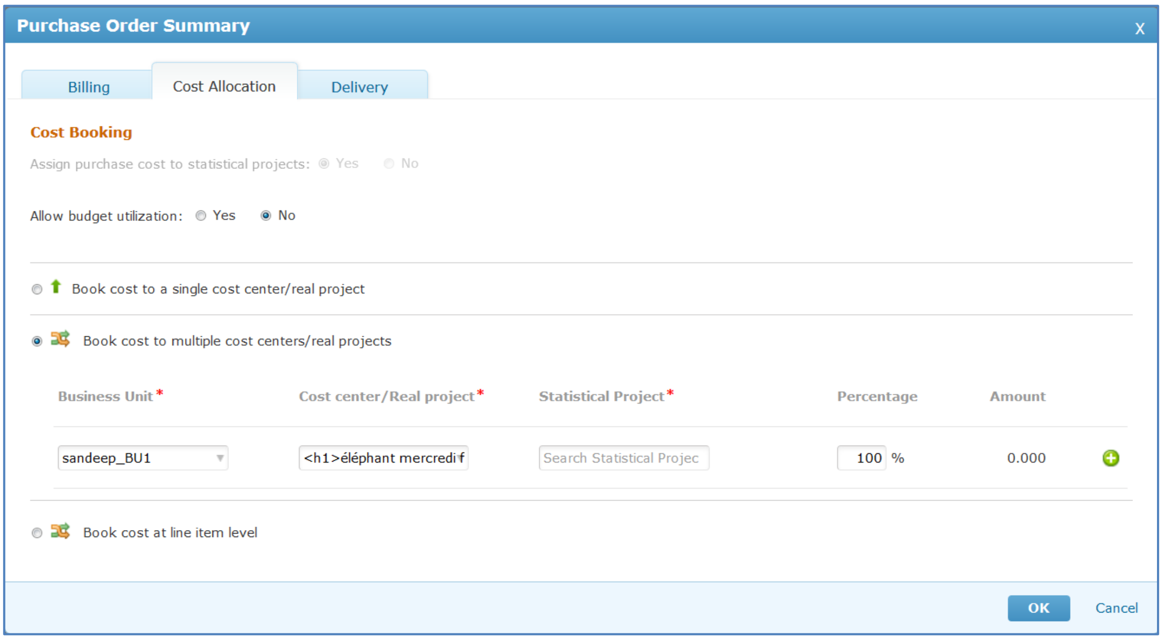
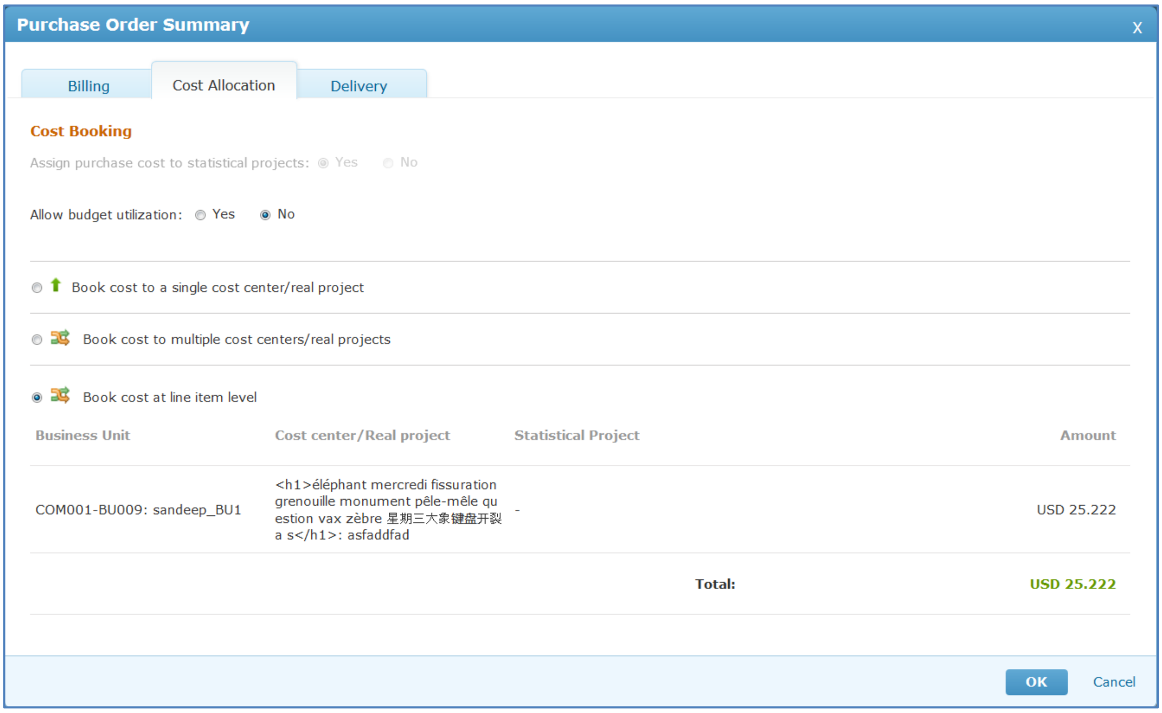


4. A Business Unit will also be available for selection at the line level, where the requester will be able to book cost to different and/or multiple Business Units for different items in the Purchase Order.

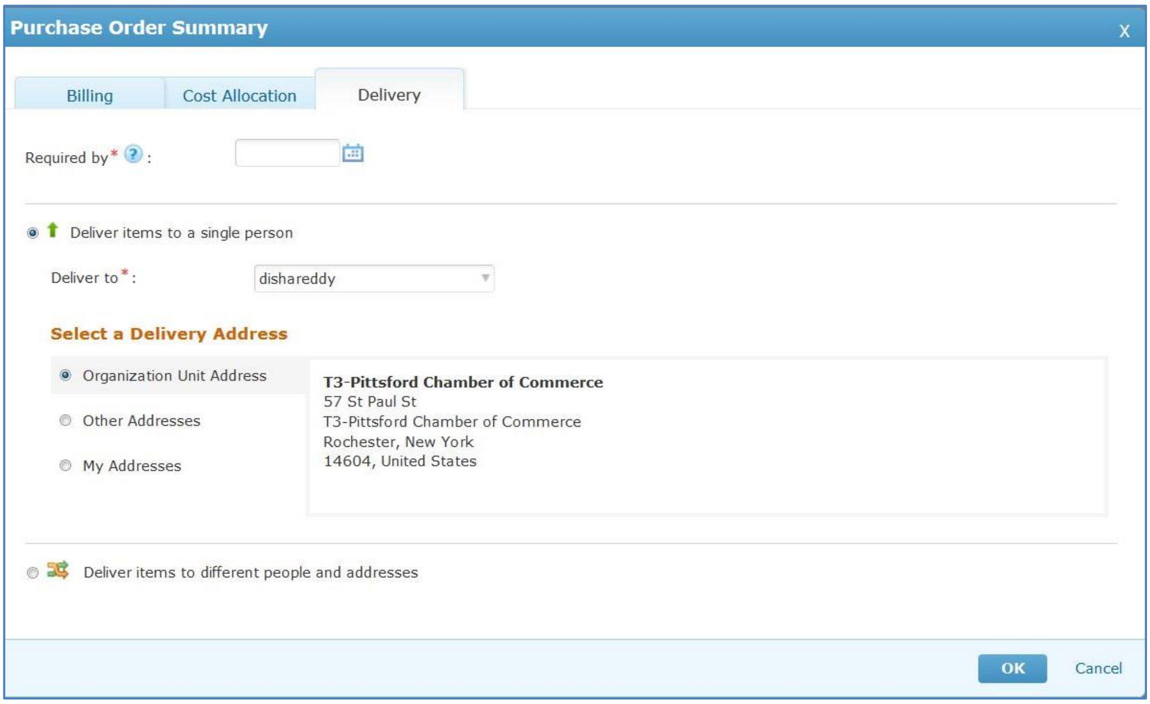


***<u>Note:</u>* The *Allow Budget Utilization* option is editable if it has been enabled by the Company Administrator.**

5. Make the required changes. Click on **Save** button.

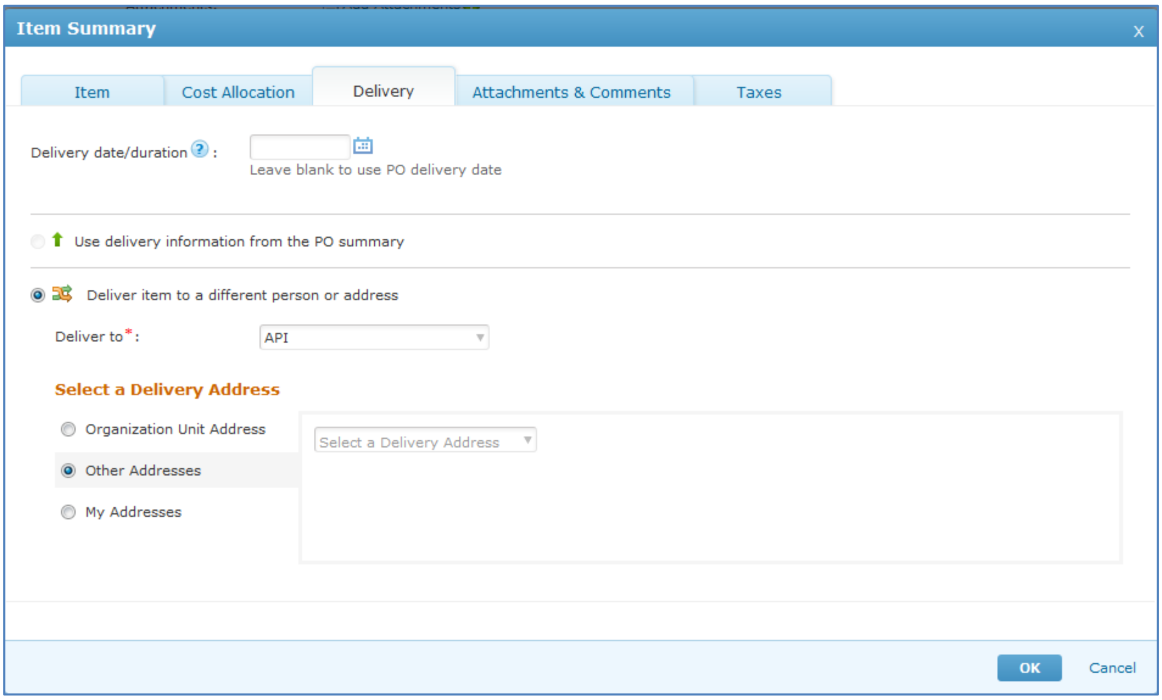
<u>Note:</u> *Line Level Item Cost Allocation is only enabled if it has been enabled by the Company Administrator.*

6. Click on the **Delivery** tab.

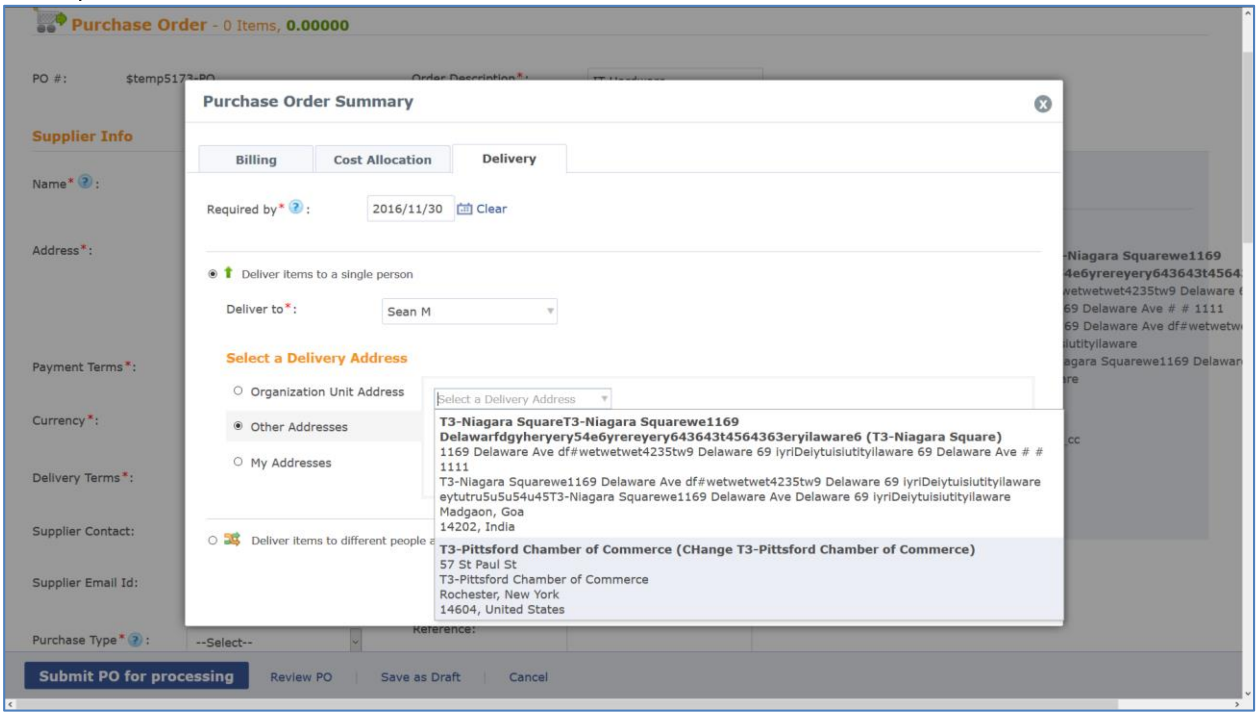


7. Under the **Delivery** tab of the **Purchase Order**, the user can select **Deliver items to a single person** in the PO or deliver each item in the PO to different person and address
8. Select the person to whom the purchase order should be delivered in the **Deliver to** dropdown box.
9. Select the date in the **Required By** date field to specify the date till when the purchase order is required to be delivered.
10. Select the **Delivery Address** for the selected location.
11. The user can select **Deliver items to different people or addresses** using the desired radio button. A different delivery address can be assigned to each item.

Provide Feedback

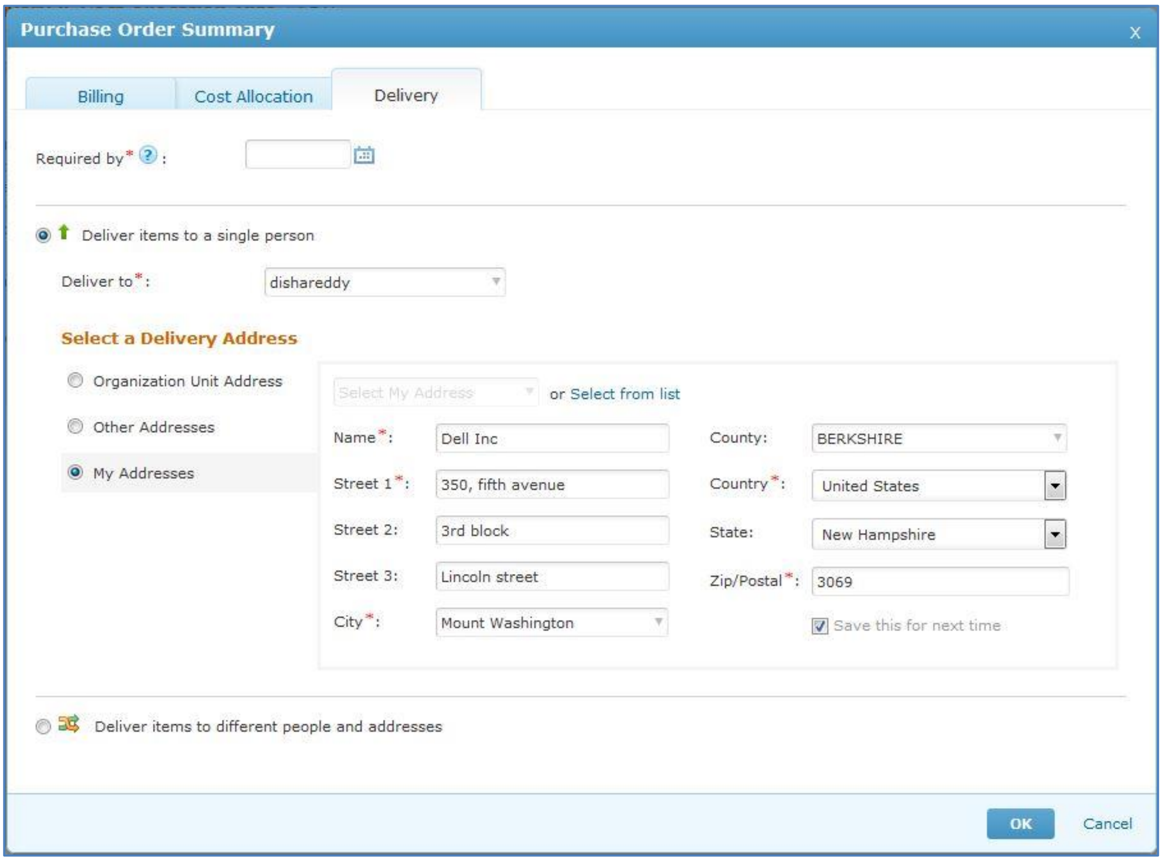


12. User can also select Other Addresses or My Addresses radio button.
13. When the user selects Other Address or My Addresses, the user will be able to choose addresses from the drop down menu as shown below:



14. To create a new address, click on **Create New Address** link next to the drop down menu against **My Addresses**.

Provide Feedback



15. Enter the details and user can save the details for next time by clicking on the checkbox against **Save this for next time**.

16. Click on **OK**.

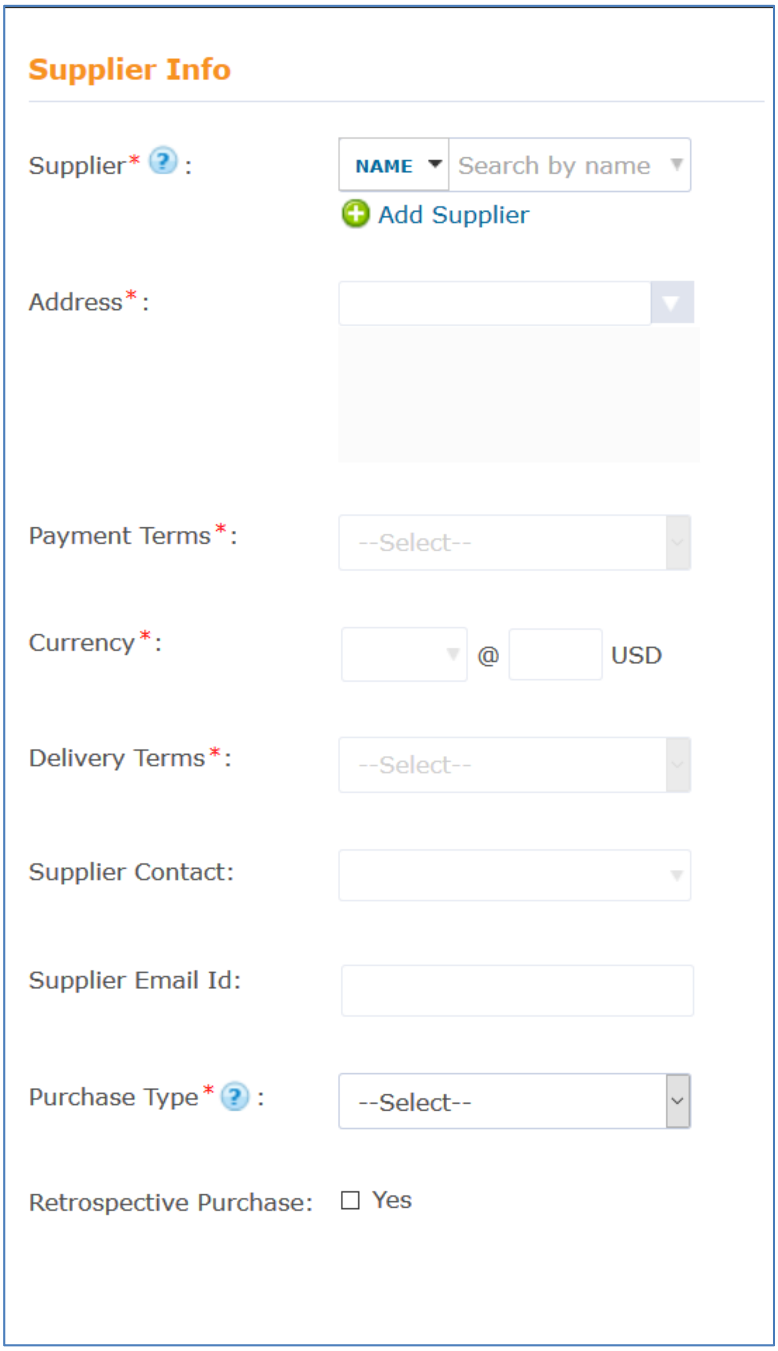
6.3.3 Selecting Suppliers

Note: *Supplier must be configured in SIM with regards to the following:*

- *Supplier must be available for the selected organization unit*
- *Supplier must have one or more addresses in any location of that OU*
- *For the supplier address, the default currency and payment terms must be defined. These defaults can be changed by buyer based on administrator settings*
- *eProc also allows buyers to add supplier in SIM repository directly from this step of PO creation. This requires access permission.*
- *When opening a draft document or amending a submitted document in eProc, supplier information like supplier name, address, etc. will be updated automatically with latest information from SIM.*

To select the suppliers:

1. Enter the required details in the mandatory fields.

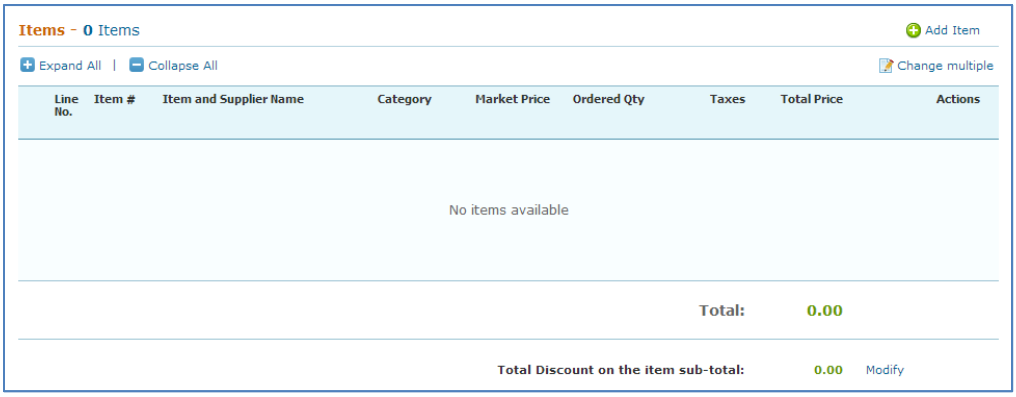


Note: You can search for a supplier by their Name or their ERP ID; however you will need to enter the exact ERP ID to search the supplier in the system.

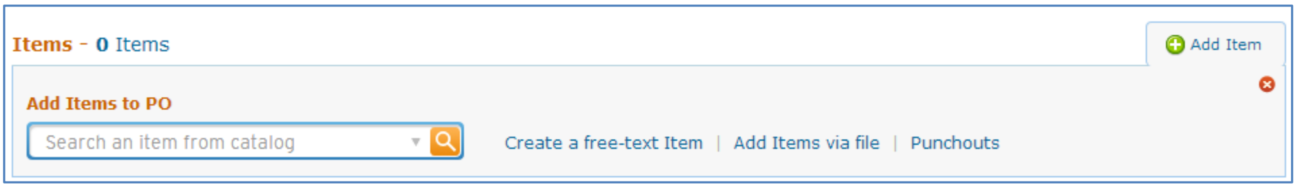
2. Buyer can provide contract details linked with this PO. Enter the reference number in the **Contract Reference Number** field or select **Continue without a contract**.

6.3.4 Adding Items

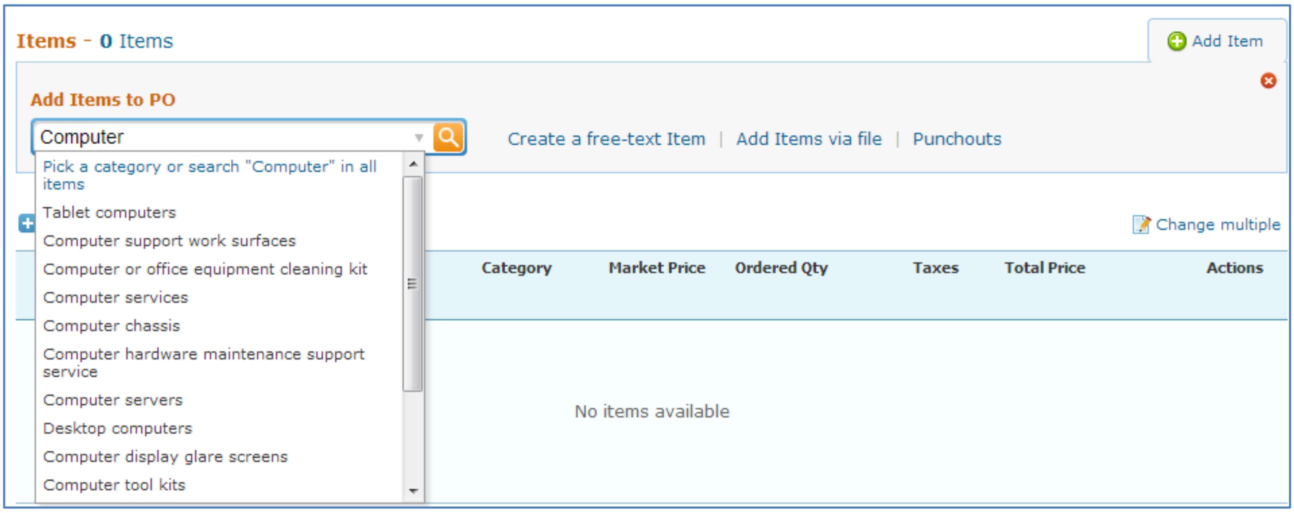
To add items:



1. Click **Add Item** to add items to the PO. The **Add Items to PO** section is displayed.

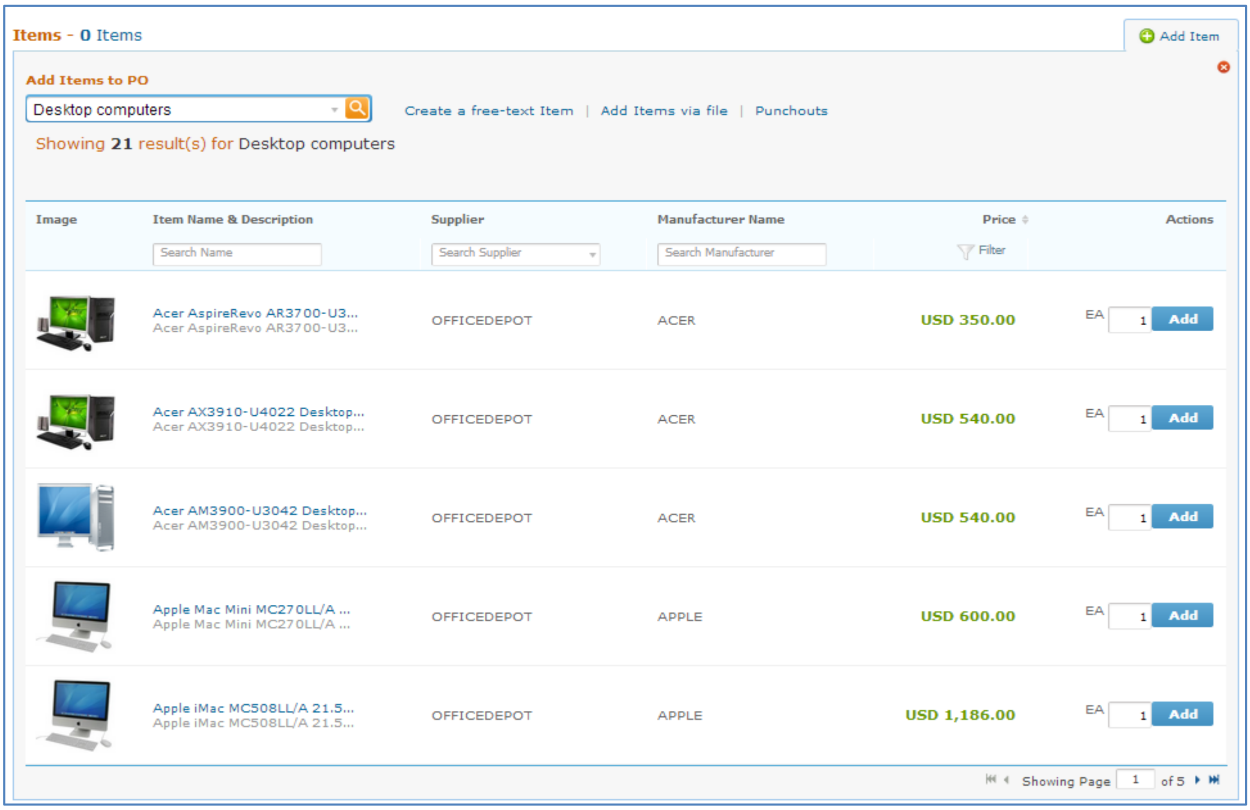


2. You can enter the item name and search for it in the catalog.



3. Select the category. All the items related to the selected category will be displayed.

Provide Feedback

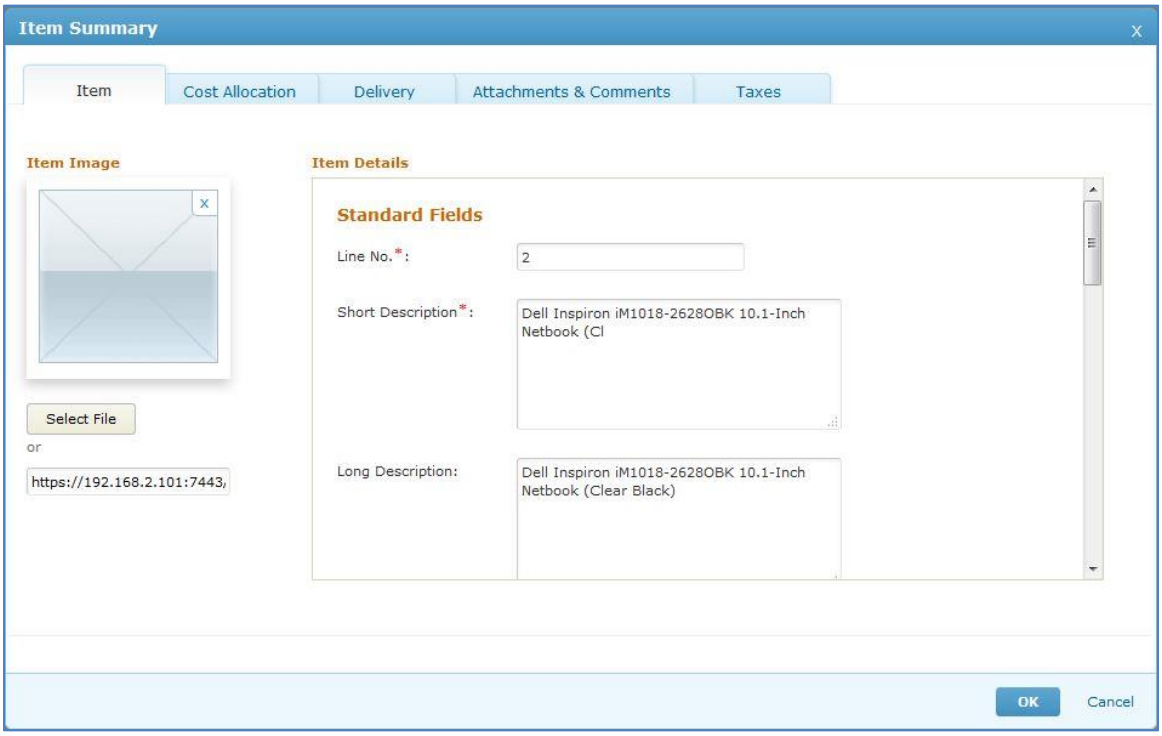


4. Click on the item to view the item details. Following popup will be displayed:

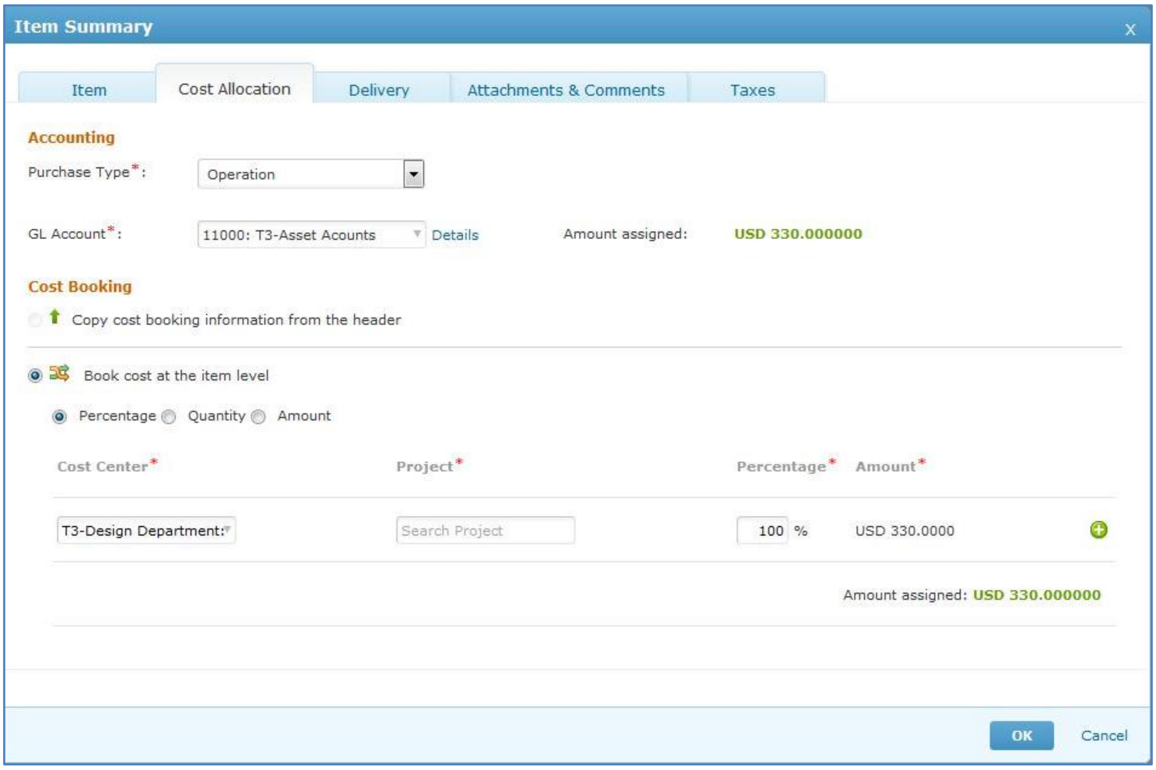
5. To add any item, enter the required quantity and click on **Add** for the corresponding item. The selected item will be added to the purchase order.

OR

6. You can click on **Create a free-text Item** to create an item by entering the product description and product category.



7. Go to **Cost Allocation tab**. If the admin has allowed the user to change the purchase type at line level, you will be able to select different purchase types for different products.



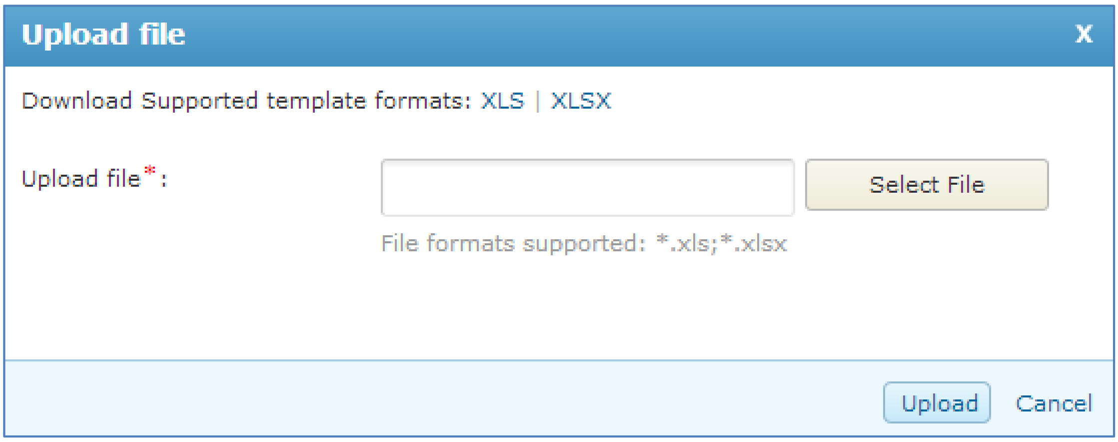
8. After entering the required details under all the tabs, click on Save to save the item and add it to the

Provide Feedback

purchase order.

OR

9. You can click on **Add Items via file** to upload the item details through default system template.



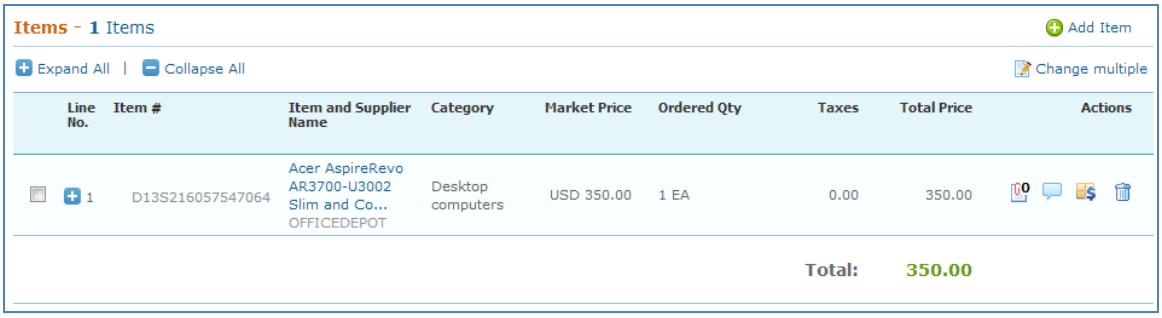
10. Click on **XLS (Microsoft Office Excel 97-2003)** or **XLSX (Microsoft Office Excel 2007 & 2010)** to download the default system template.

11. Enter the required details in the downloaded template.

12. Click on Select File to locate and select the template into the system.

13. Click on **Upload**. All the items in the template are added to the purchase order.

This is how the items will be displayed once they are added to the purchase order.



6.3.5 ***Taxes***

Once you have added the items to the purchase order, you can add the taxes applicable on the item.

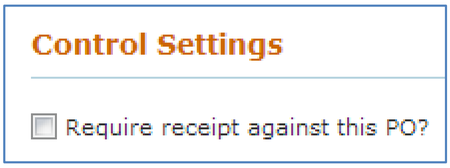
1. Select the **Tax Type**.

2. Enter a name for the **Tax**.

3. Enter the **Tax Rate**. The Tax amount applicable on the item amount will be calculated and displayed. The same Tax amount will be added to the total amount of the purchase order.

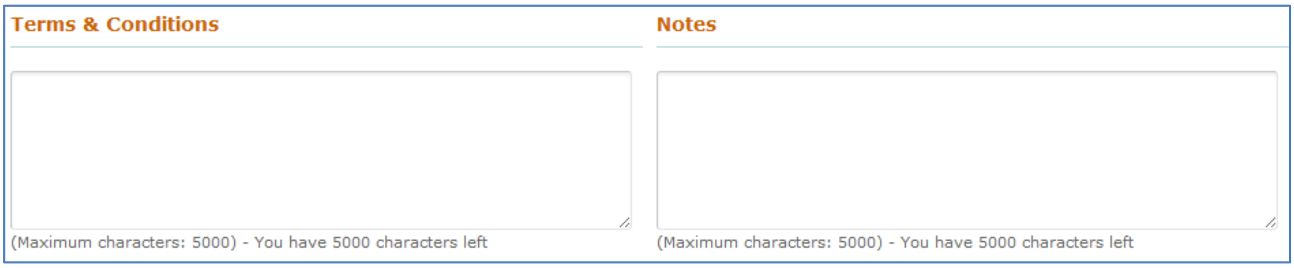
6.3.6 Control Settings

Under **Controls Settings** section, select the **Require receipt against this PO?** checkbox to make it mandatory against this purchase order.



6.3.7 Terms & Conditions

Under **Terms & Conditions** section, you can add the terms & conditions, important note related to the items/purchase order.



6.3.8 Submitting your Order (Check - Out)

To submit your order:

1. Click on **Submit** to send the purchase order for approval.
2. Click on **Review PO** to review the print page of purchase order.
3. Click on **Save as Draft** to save the purchase order in draft stage. The PO is then listed in the **Purchase Orders** page.
4. Click on **Cancel** to go back to **Purchase Order** page.

Note: *Once you click on Cancel, all the details entered in the purchase order will be lost.*

Provide Feedback

6.4 Creating a Blanket PO

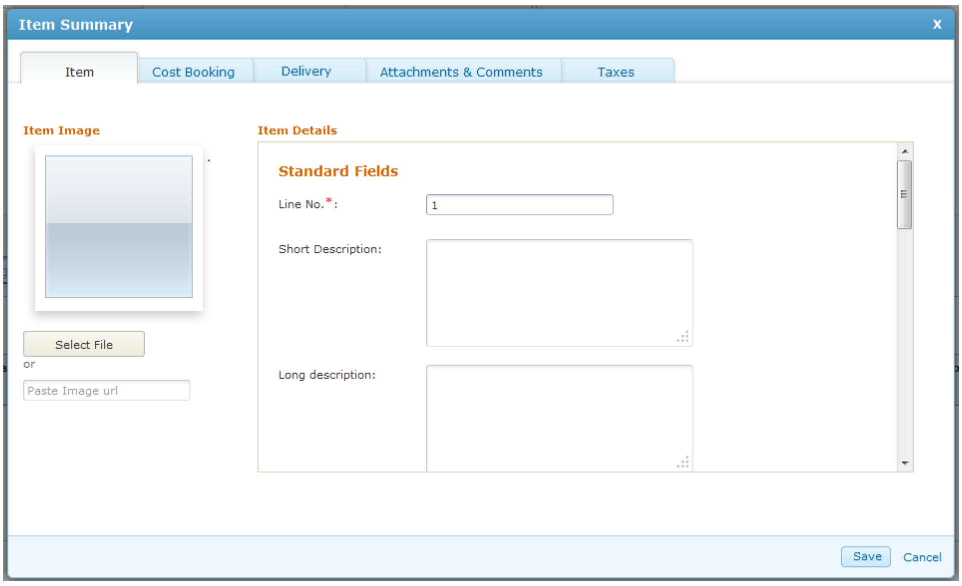
Steps to create a blanket purchase order are similar to those described above for creating a Standard purchase order except for the following additional details:

6.4.1 Free-text Item Details

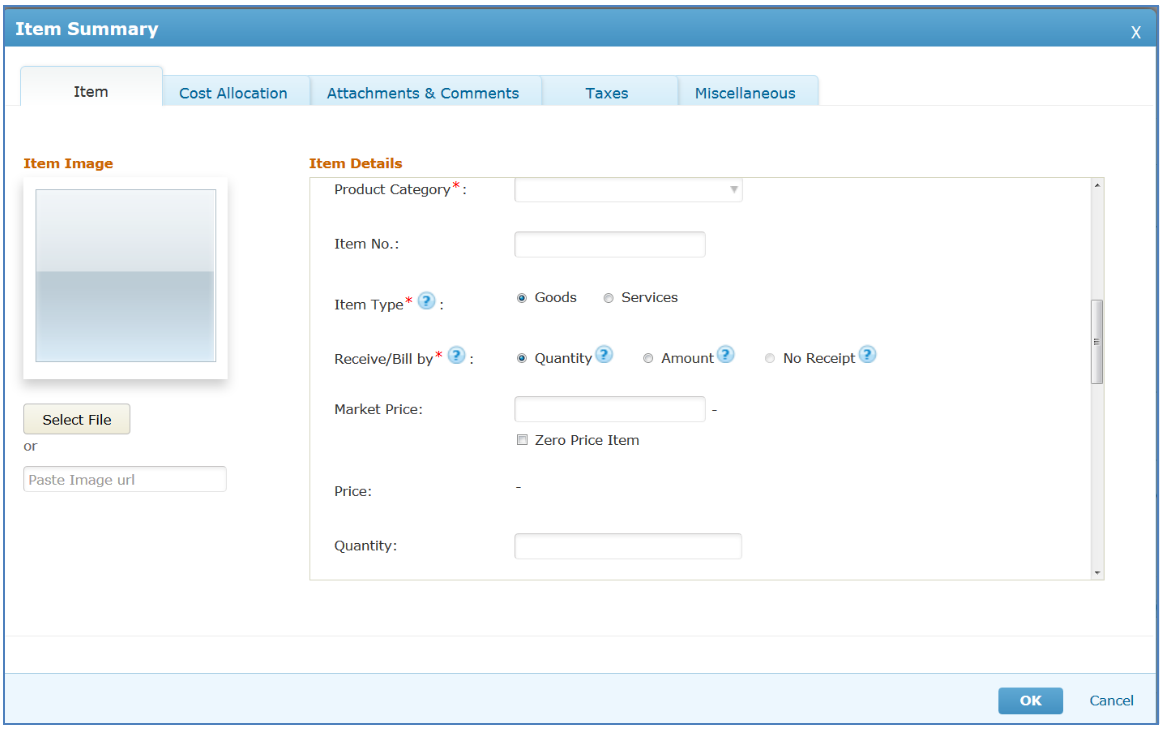
For creating a free-text item in a blanket PO, perform the following steps:

1. Open the **Blanket purchase** Order page. Click on **Add Item.**

2. To create a free-text item, click on **Create a free-text Item**.



3. Enter the **Line No, Short Description** and **Long Description** for the Item.



4. Select the **Product Category** from the drop down list and enter the **Item No**.

5. Select the **Item Type** (Good / Services).

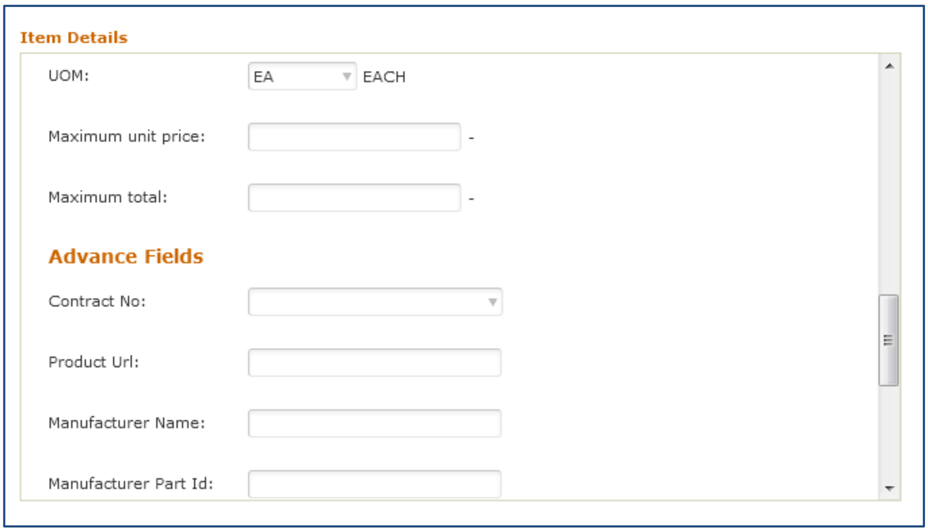
6. The field will cease to be editable once a release is created against the BPO.

7. Amount for an item across the releases should be less than the maximum total of the BPO.

Note: *If Services is selected as Item Type, Delivery section provides option of Delivery Period (from-to).*

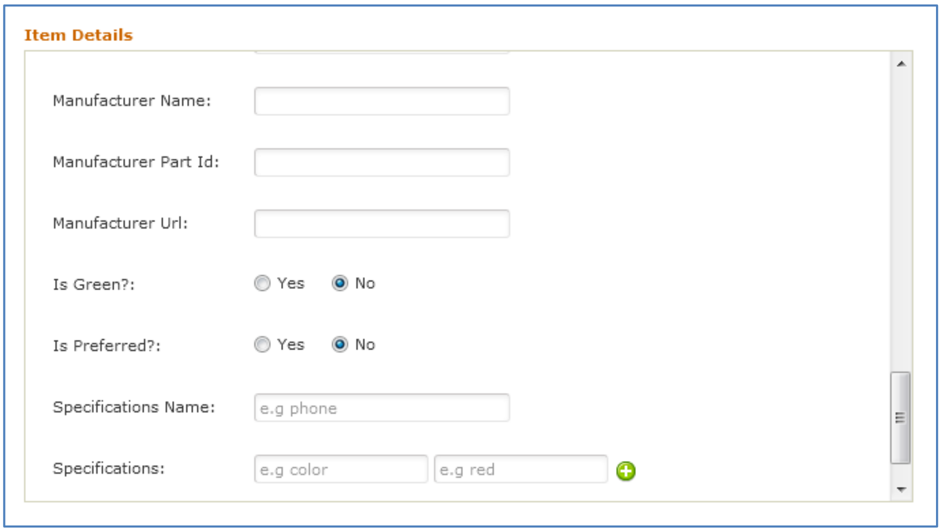
Note: *Check the **Zero Price Item** in order to add an item with no price or zero price to the Catalog.*

8. Enter the **Market Prices** and the **Quantity**.



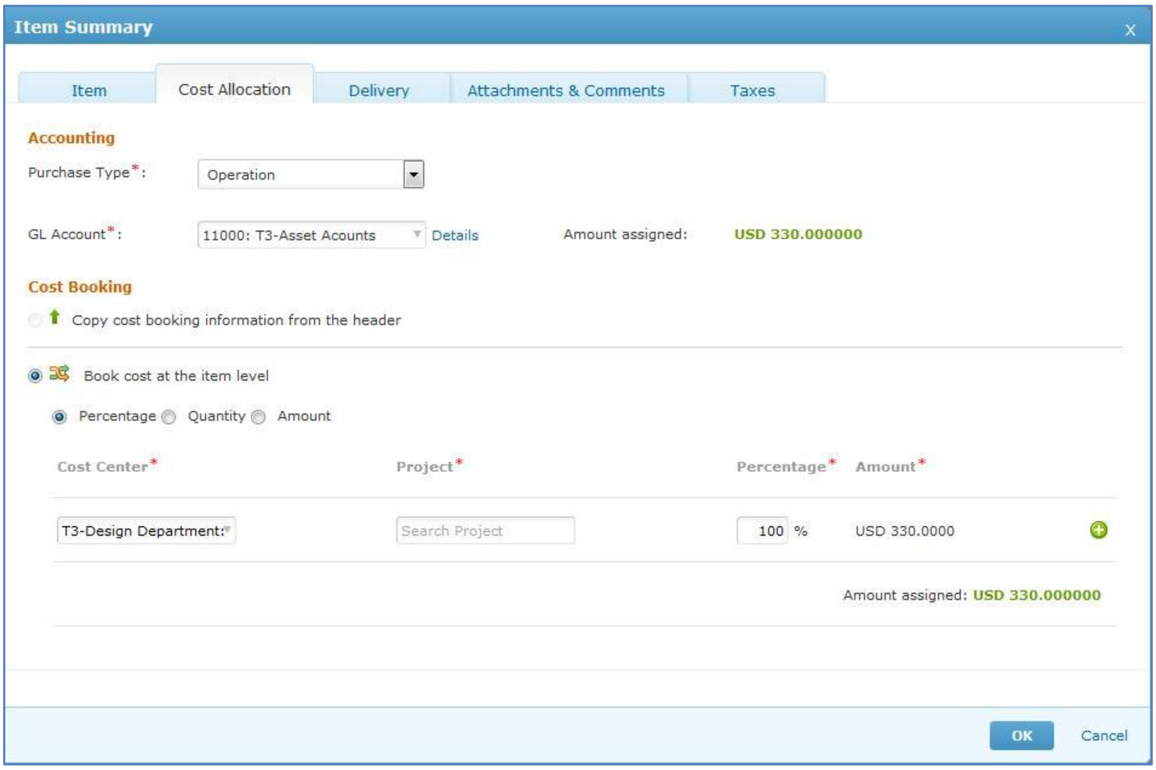
9. Select the **UOM** (Unit Of Measurement) from the drop down list and enter the **Maximum unit price** and **Maximum total**.

10. Under Advance Fields, select the **Contract No**. from the drop down list. Enter the **Product URL, Manufacturer Name, Manufacturer Part Id** and **Manufacturer URL**.



11. Select the appropriate option for **Is Green** and **Is Preferred**. Enter the **Specifications Name**, and the **Specifications**.

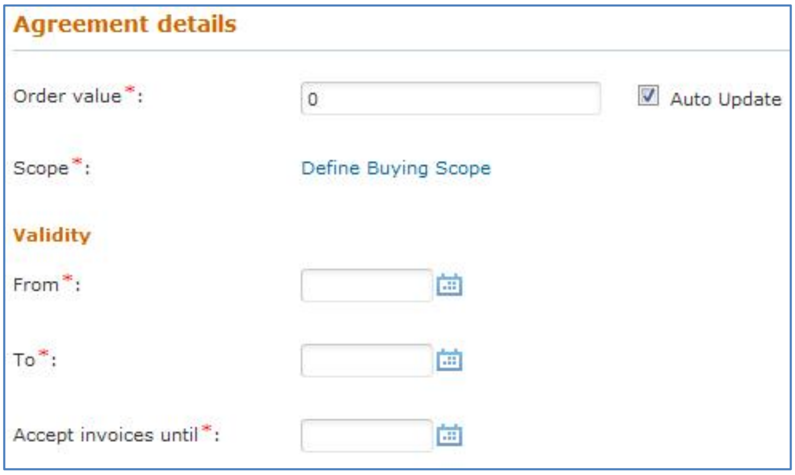
12. Go to **Cost Allocation tab**. If the admin has allowed the user to change the purchase type at line level, you will be able to select different purchase types for different products.



13. Click on **OK**.

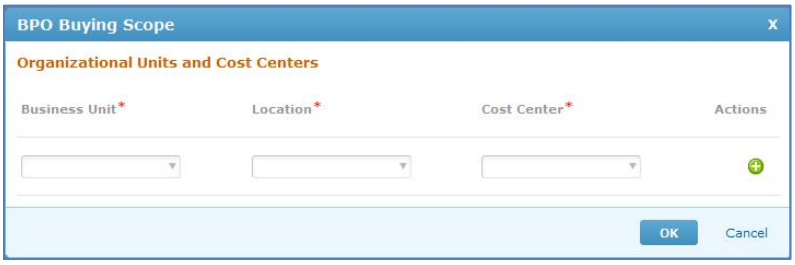
6.4.2 Agreement Details

Under Agreement Details section, you have to enter the following details:



1. In the **Order value** field, enter the order value of the purchase order.

2. Click **Define Buying Scope** to define the buying scope for the Blanket PO.



3. Enter the **Business Unit**, **Location** & **Cost Center** to be defined as the Release Scope.

4. To add additional scope to the Blanket PO (BPO), click on the icon. Add the required scope to the BPO and click **OK**.

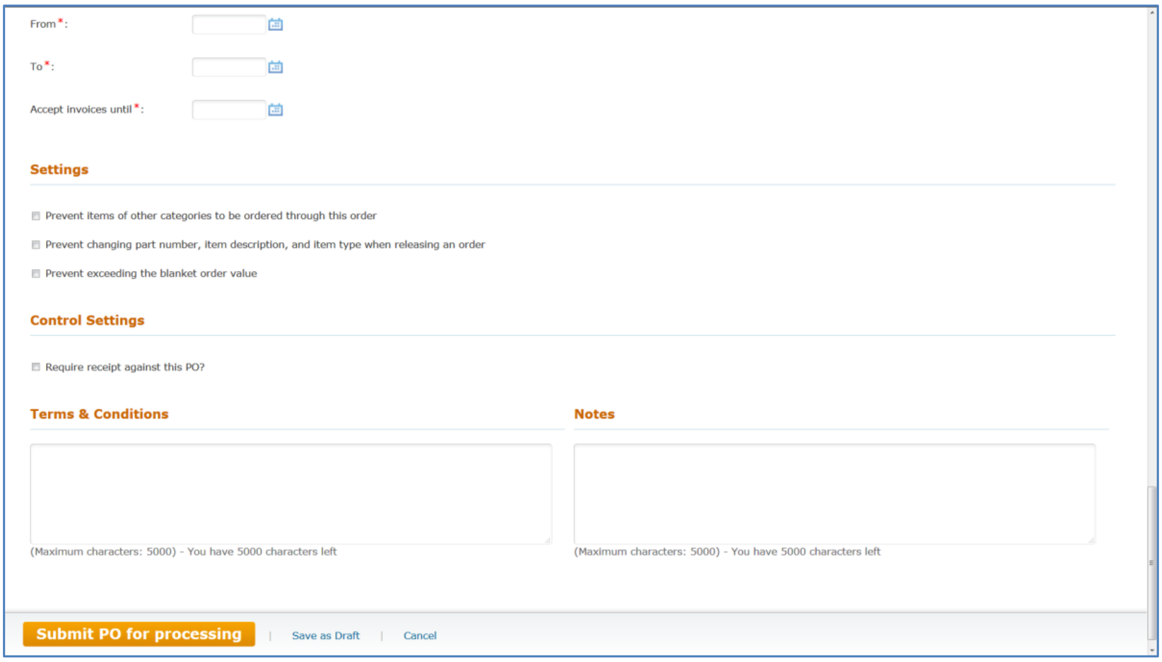
5. Select the **Auto Update** check box to automatically update the Order value which is equal to sum of items + taxes – discounts

6. Under **Validity** sub-section, enter the from date in the **From** date field & the to date in the **To** date field to set the period till when the blanket purchase order will be valid.

7. For **Accept invoice until** field, select the date till when the invoices will be accepted for the blanket purchase order.

6.4.3 Settings

Under **Settings** section, you can make the following changes:



1. Select the **Prevent items of other categories to be ordered through this order** checkbox so that the items belonging to categories other than those specified above in the purchase order cannot be ordered &

invoiced.

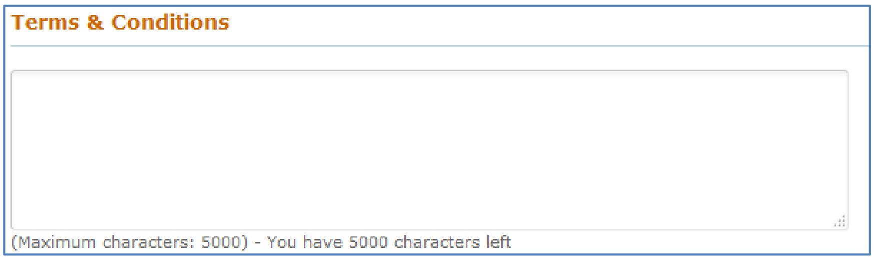
2. Select the **Prevent changing part number, item description and item type when releasing an order** checkbox so that only those items will be allowed on the releases which are defined on the PO; new items cannot be added.

3. Select the **Prevent exceeding the blanket order value** checkbox so that the total value of releases against the blanket order will be limited by tolerances.

4. Select the **Hide blanket order value from the supplier** checkbox so that user can Hide blanket order value from the supplier, else, it will be as it is when the BPO is sent to the supplier.

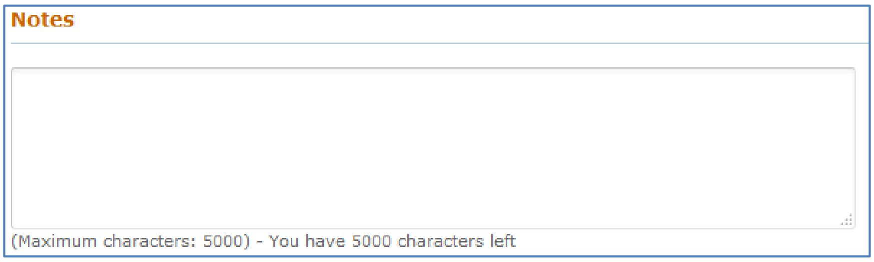
6.4.4 *Terms & Conditions*

Under **Terms & Conditions** section, enter the Terms & Conditions for the Blanket Purchase Order (BPO).



6.4.5 *Notes*

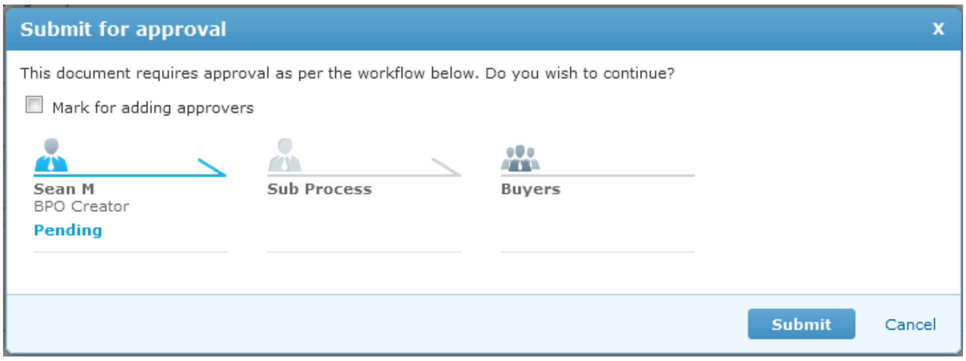
Under **Notes** section, enter any required notes regarding the Blanket Purchase Order (BPO).



6.4.6 *Submit PO for Processing*

After all the above steps have been performed, click on the **Submit PO for Processing** button.

Once clicked, the following **Submit for approval** dialog box is displayed



Click **Mark for adding approvers** to add new approvers to the existing Workflow.

Make the required changes & click **Submit**.

Note: *Cost Allocation for Items in a Blanket Purchase Order can be performed at a Line Level.*

6.4.7 *Create a Release for a Blanket Purchase Order*

Once you have created a blanket purchase order, you have to create a release against the blanket purchase order in order to make any purchases under that blanket purchase order.

To create a Release for a Blanket Purchase Order:

1. On the **PO** listing page, for a **Blanket** type purchase order, click on **Actions**.

2. Click on **Create Release**. The purchase order page will be displayed.

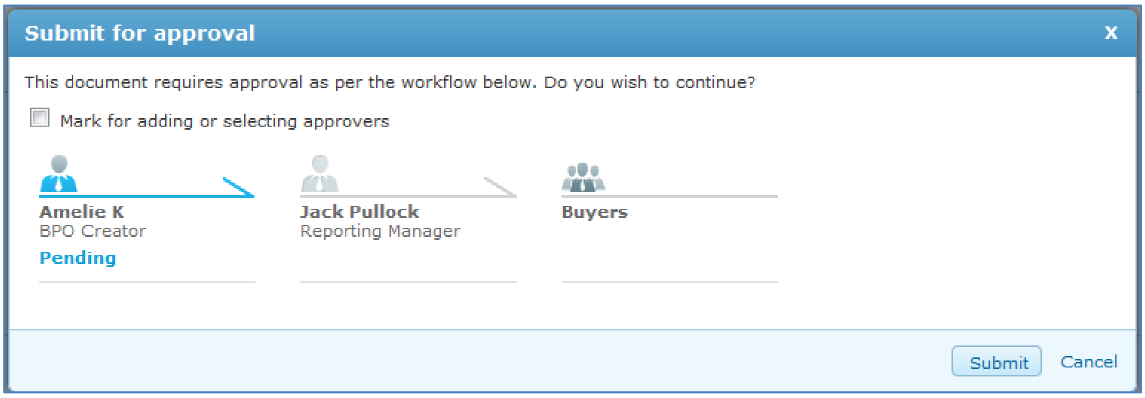
User can make changes to this release only as per the settings defined while create the blanket purchase order.

Note: *A Blanket Purchase Order (BPO) can now be tagged to a Buget under the **Cost Allocation** tab in the Purchase Order Summary.*

3. After making changes to the release, click on **Submit PO for Processing**. The release created against the blanket purchase order is submitted for further processing.

4. Once you click **Submit PO for Processing,** the Submit for approval dialog window is displayed.

Select **Mark for adding or selecting approvers** option to save the requisition in the **Ready for Approval** status. This will allow you to add approvers once the requisition is available for editing under the **My Requisitions** page.



Chapter 7: Tracking Purchase Orders (PO)

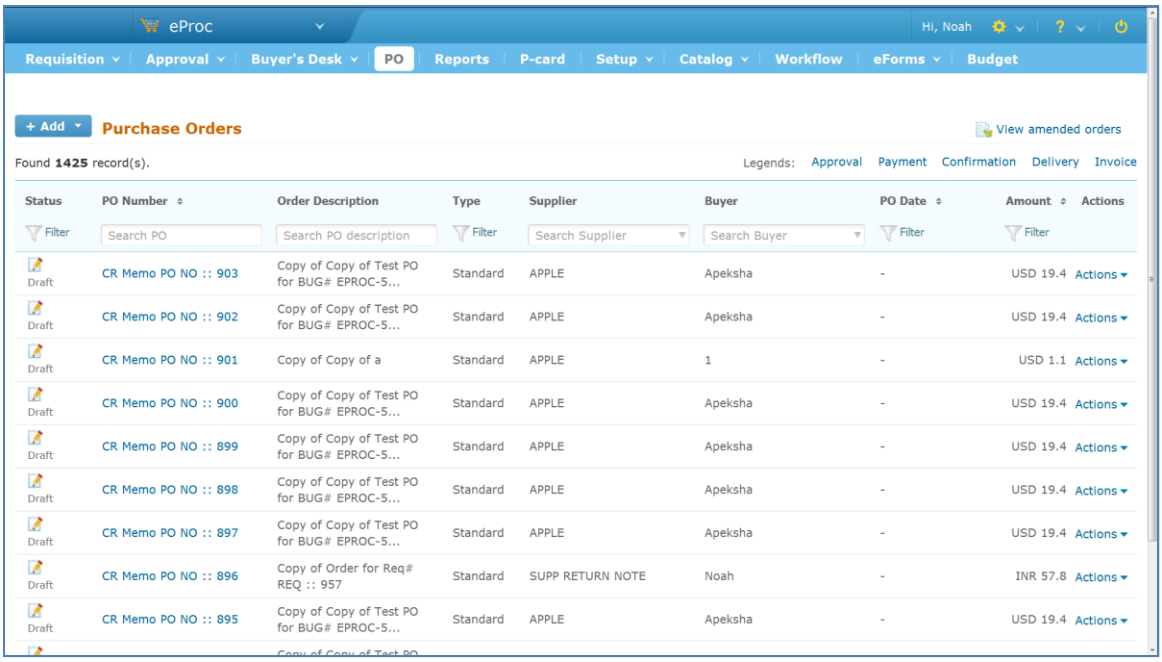
7.1 Introduction

eProc enables you to track all your POs and also view them individually. You can also sort the POs.

7.2 Viewing all POs

You can view your POs in the **PO** tab.

- Click **PO** tab. The **Purchase Orders** page is displayed.



Note: You can search for a **PO** by **Order Description**.

Provide Feedback

The following table describes the PO status in detail:

Status	Description
Draft	This status describes that the PO is in draft stage
Approval	
In Approval	This status describes that the PO is sent for approval from other associates
Parked	This status describes the POs are yet to be released to the suppliers
Rejected	This status describes that the PO is rejected by the supplier
Expired	This status describes that the PO has expired
Closed	This status describes that the PO is in closed state
Payment	
Not Paid	This status describes that the PO has not been paid yet
Partially Paid	This status describes that PO has been partially paid
Fully Paid	This status describes that PO is fully paid
Confirmation	
Unconfirmed	This status describes that PO is still not confirmed by the supplier
Confirmed	This status describes that PO is confirmed by the supplier
Rejected	This status describes that PO is rejected by the supplier
Not sent to supplier NA	This status describes that PO is not sent to the supplier
Delivery	
Not Delivered	This status describes that items are not yet received against this purchase order
Partially Received	This status describes that PO is partially received
Fully Received	This status describes that PO is fully received
Invoice	
Not Invoiced	This status describes that PO is not yet invoiced
Partially Invoiced	This status describes that PO is partially invoiced
Fully Invoiced	This status describes that PO is fully invoiced

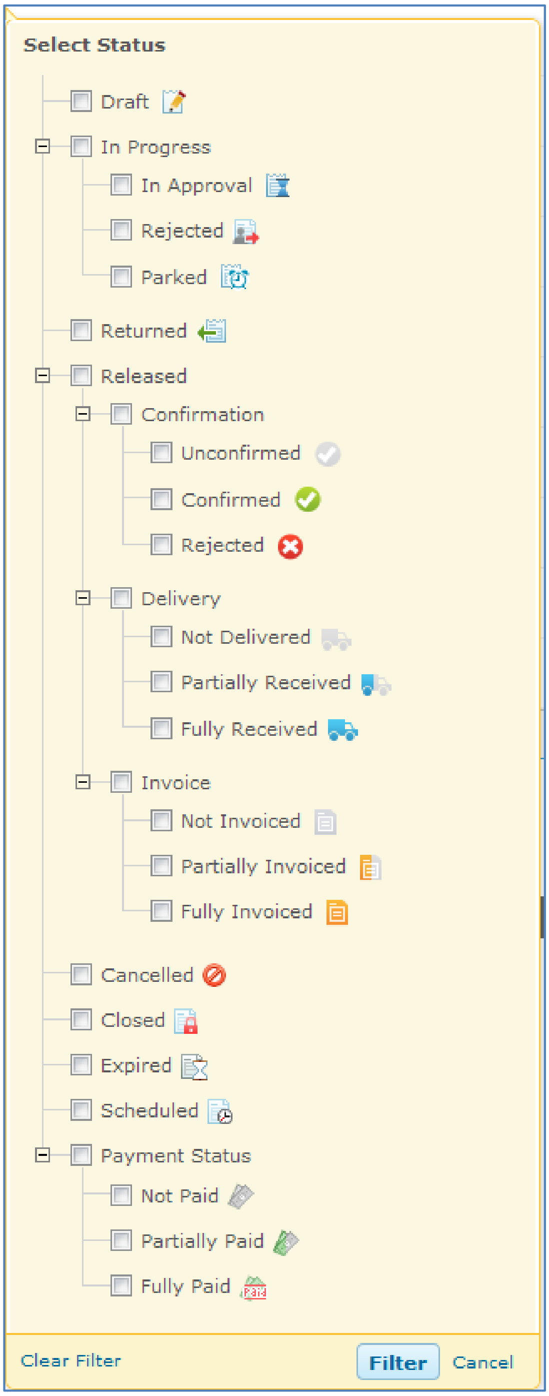
<u>Note:</u> *Only draft POs can be modified or deleted.*

7.2.1 Filtering & Sorting Purchase Orders (PO)

There are several ways in which you can sort and filter out the relevant data.

- **Status Filter**

Users can filter the POs on the basis of their status. To use the status filter, click on Filter link below Status



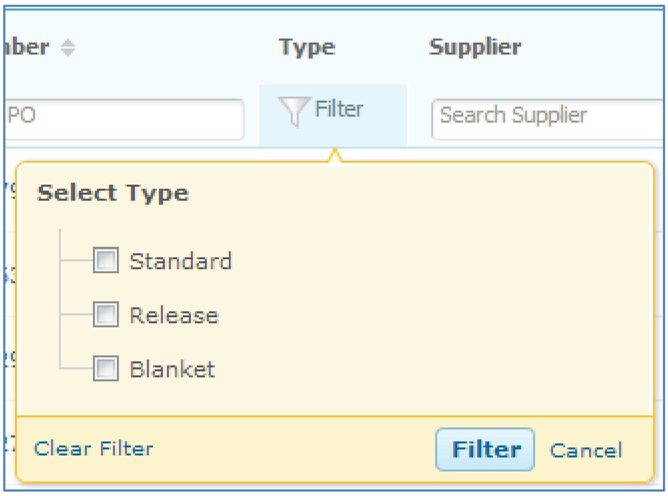
Select the status by which you want to filter out the POs and click on **Filter**.

- **Sorting PO Number**

Beside the **PO Number** header, users can click on ▲ to sort the POs in ascending order and click on ▼ to sort the POs in descending order.

- **Type Filter**

Users can filter the POs on the basis of their type. To use the status filter, click on Filter link below Type

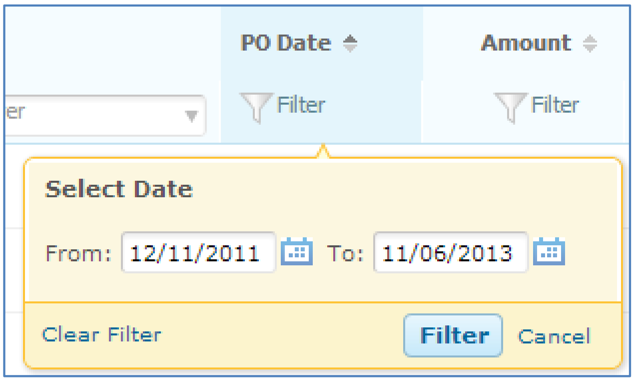


Select the type by which you want to filter out the POs and click on **Filter**.

- **Sorting, Filtering PO by Date**

Beside the **PO Date** header, users can click on ▲ to sort the POs by oldest first order and click on ▼ to sort the POs by newest first order.

Users can also filter the POs on the basis of period. To use the status filter, click on Filter link below PO Date

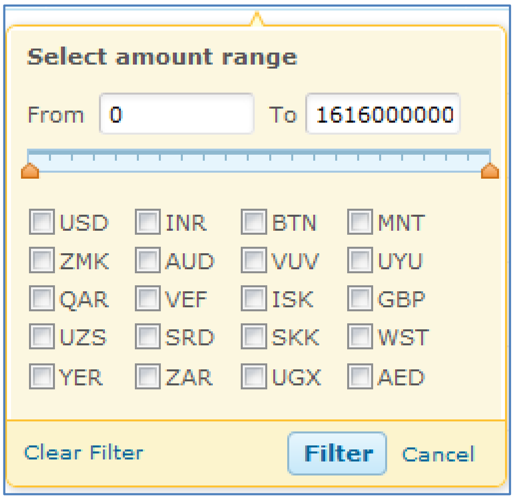


Select the date range to view the POs created in that range and click on **Filter**

- **Sorting, Filtering PO by Amount**

Beside the **PO Amount** header, users can click on ▲ to sort the POs ascending order and click on ▼ to sort the POs by descending order.

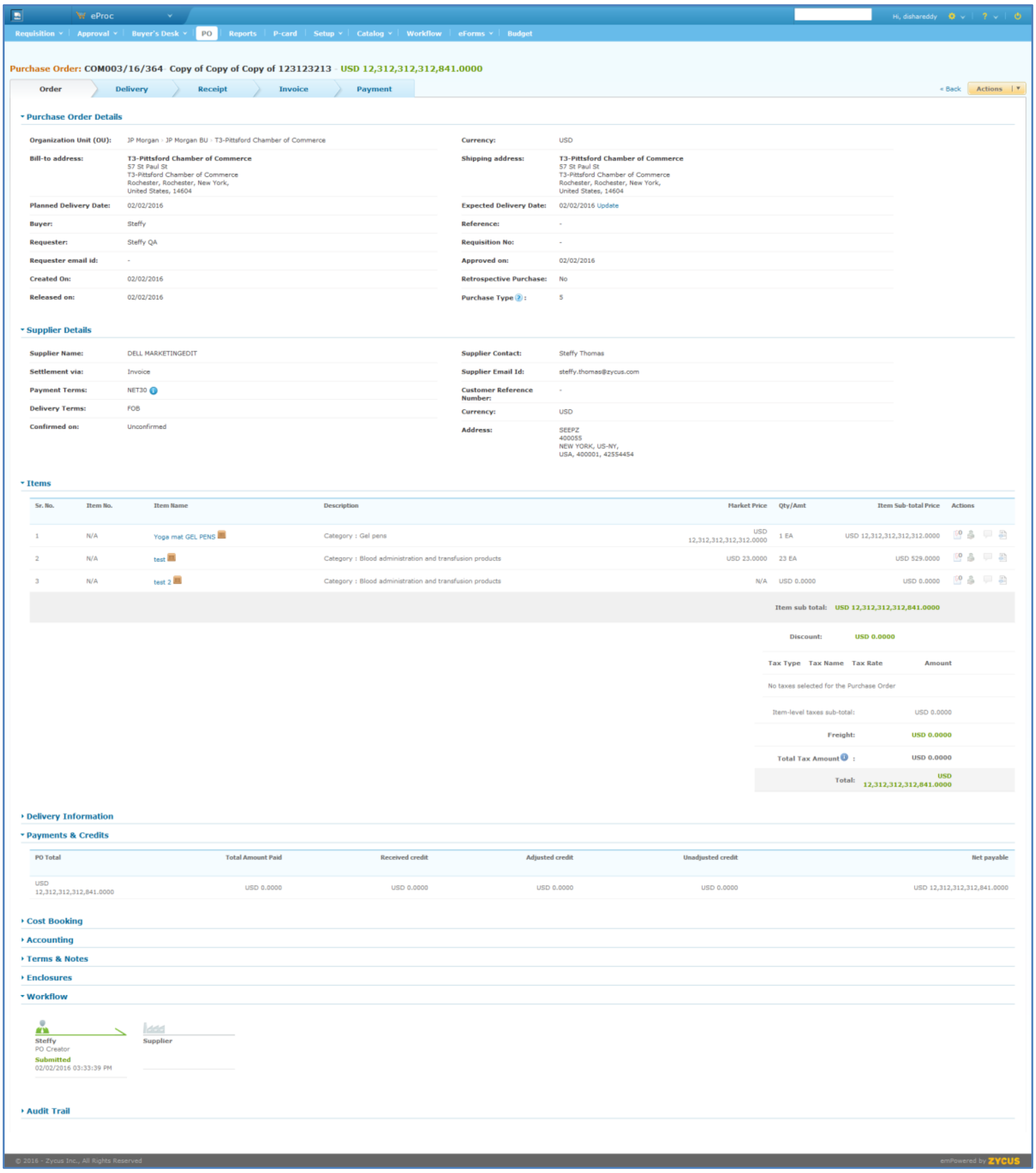
Users can also filter the POs on the basis of amount. To use the status filter, click on Filter link below PO Amount



Select the amount range to view the POs created in that range, select the currencies and click on **Filter**

7.3 Viewing a PO

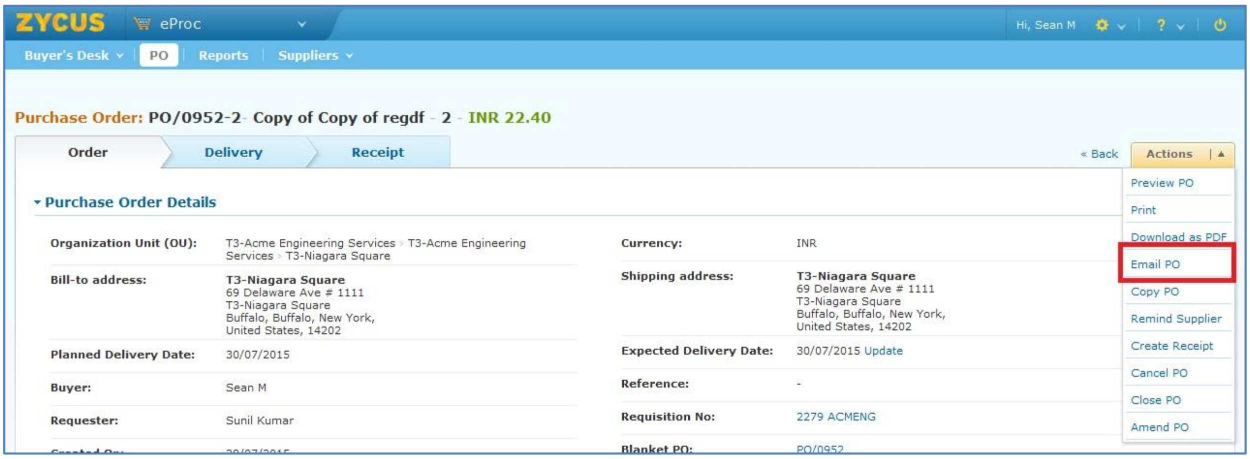
Users can click on a PO to view the PO details. The following page is displayed.



7.3.1 Emailing a PO

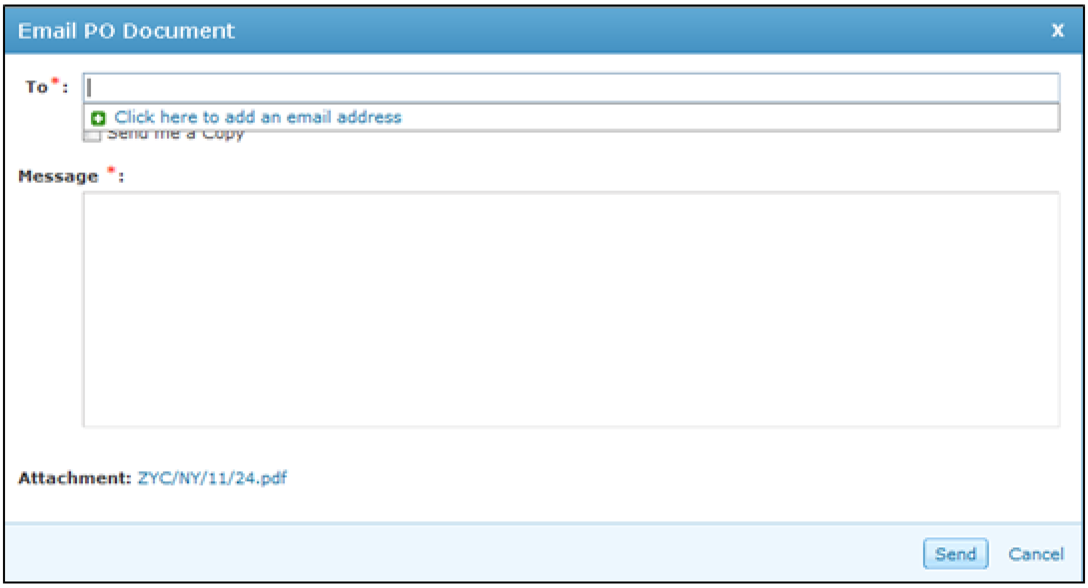
To email a PO:

Provide Feedback



1. Search and open the required PO. Click on the **Actions** menu.

2. Select the **Email PO**. The **Email PO Document** dialog box is displayed.



3. Enter the email addresses in the **To** field.

Note: *Settings can be defined to decide whether POs can only be mailed to supplier contacts or any email address.*

4. Select **Send me a Copy** checkbox if you wish to receive a copy of PO attached in an email.

5. Enter a message in the **Message** field.

6. The PO is attached in the **Attachment** field.

7. Click on the **Send** button.

Note: *PO can be printed any time after it has been released, unless it is cancelled.*

7.3.2 Printing a PO

To print a PO:

1. Search and open the required PO. Click on the **Actions** menu.

2. Select the **Print** option. The **Print** dialog box is displayed.

3. Select a Printer and click **Print** to print the PO.

Note: *In case of Service, system prints the required period for a service, if both 'From' and 'To' are specified else only the 'From' date as per existing format. System also prints 'Delivery Required By' For 'Goods' only 'From' date will be printed. In PO print, Delivery date /duration should be displayed in item grid next to Description.*

Note: *Please contact your administrator to configure a PO template for your organization.*

7.3.3 Downloading a PO as PDF

To download a PO as PDF:

1. Search and open the required PO. Click on the **Actions** menu.

2. Select the **Download as PDF** option. The **File Download** dialog box is displayed.

3. Click **Open** to open the PO.

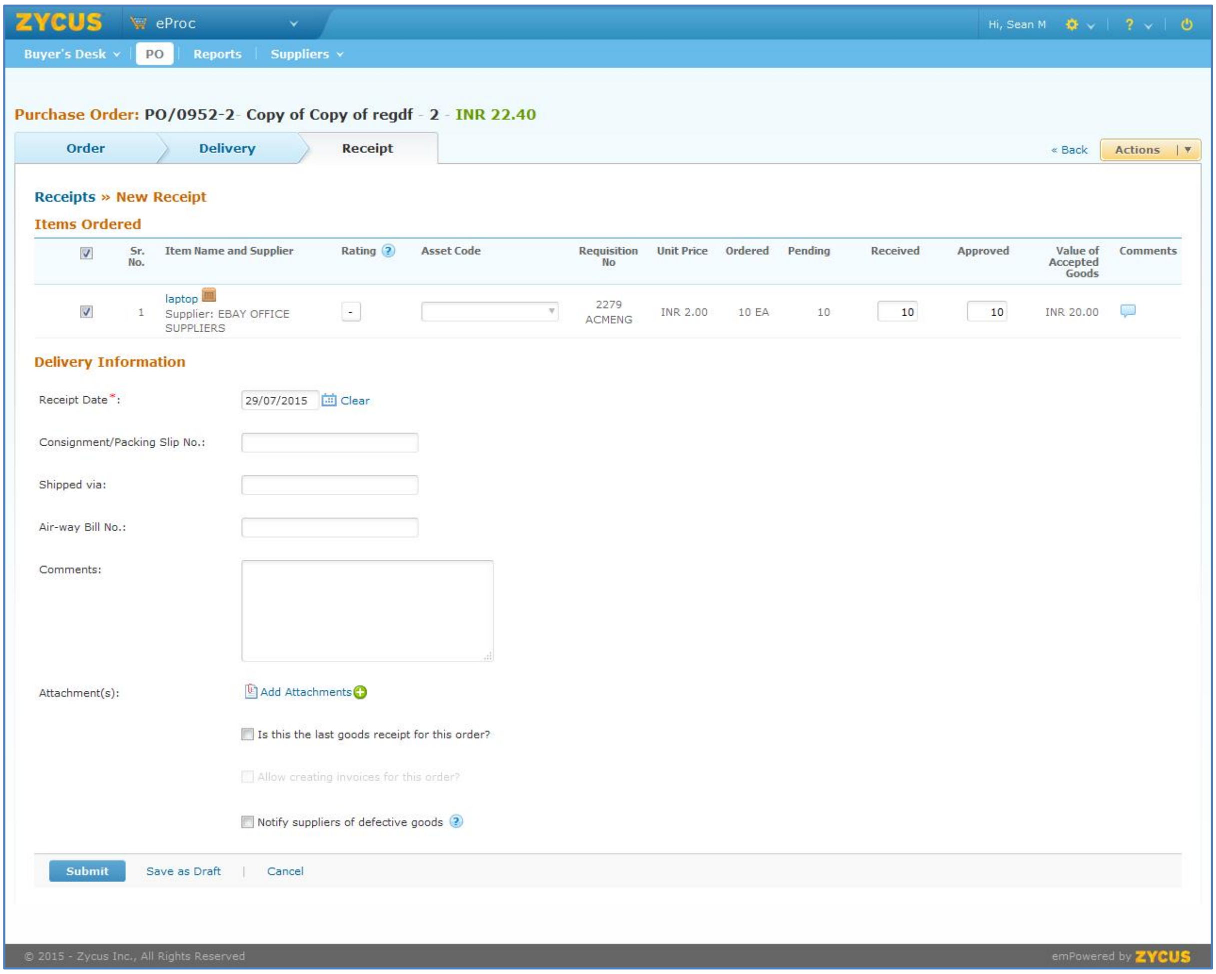
4. Click **Save** to save the PO in a desired location.

7.3.4 Creating New Receipt against a PO

To create a new receipt:

1. Search and open the required PO. Click on the **Actions** menu.

2. Select the **Create New Receipt** option. The following page is displayed.



3. Under the **Items Ordered** section, select an item and enter the quantity received and approved in the **Received** and **Approved** fields respectively.

Note: *Approved quantity cannot be greater than Received quantity.*

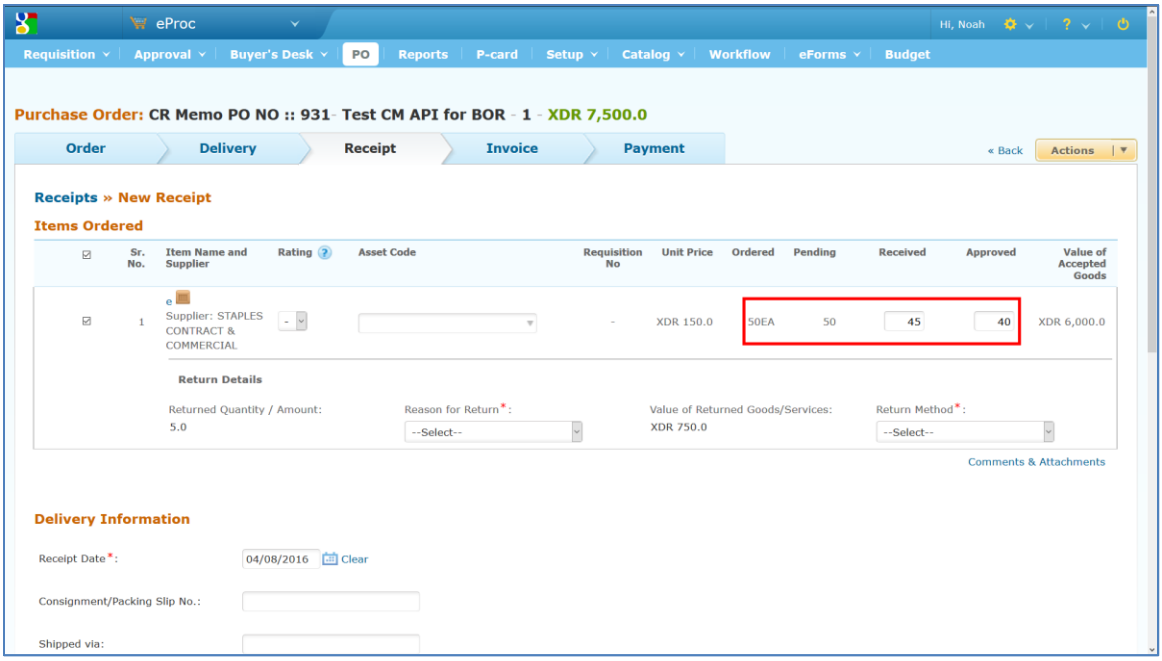
7.3.4.1 Automatic Return Notes

4. If the approved quantity is less than the received quantity, then for the pending quantity, an **Automatic Return Note (ARN)** will be created. Shown below is the ARN creation process.

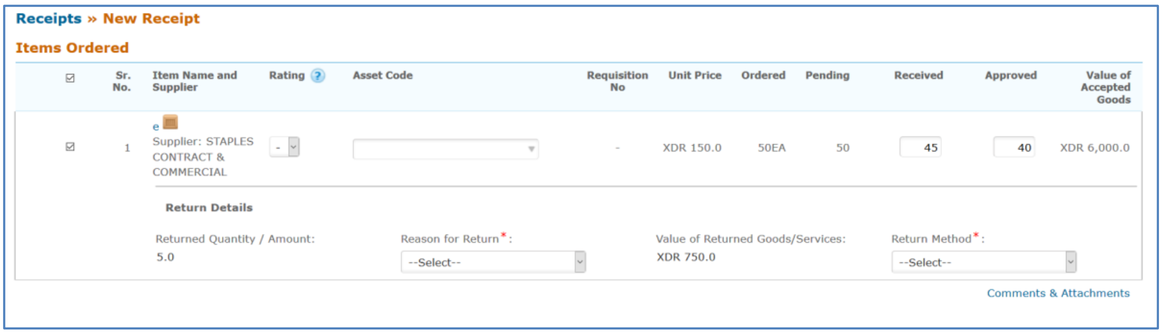
What is Return Notes?

Provide Feedback

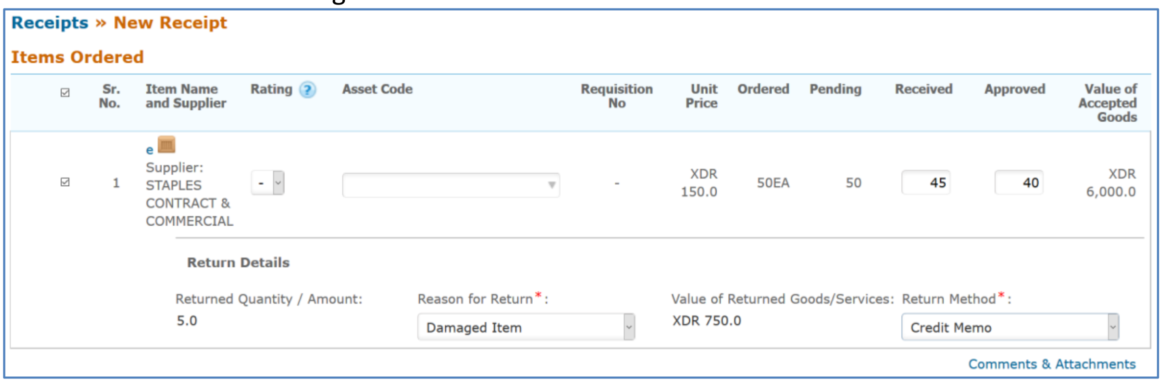
Return notes are acknowledgement notes created when goods are returned to the Supplier, damaged or otherwise. They help keep a track of the goods received and returned.



- For line item 1, ordered quantity = 50, pending = 50, received = 44, approved = 40.
- For the difference between the Approved and Received quantity, an Automatic Return Note will be created.
- The return note section will be expanded once the Approved quantity is < Received quantity.



5. Enter the **Reason** for returning the items and the **Return Method**.



6. Under the **Delivery Information** section, enter the required details in the respective fields.

Provide Feedback

7. Select the date on which the goods/items are received in the **Receipt Date** field.

8. Enter the consignment details or packaging slip number in the **Consignment/Packaging Slip No. field**.

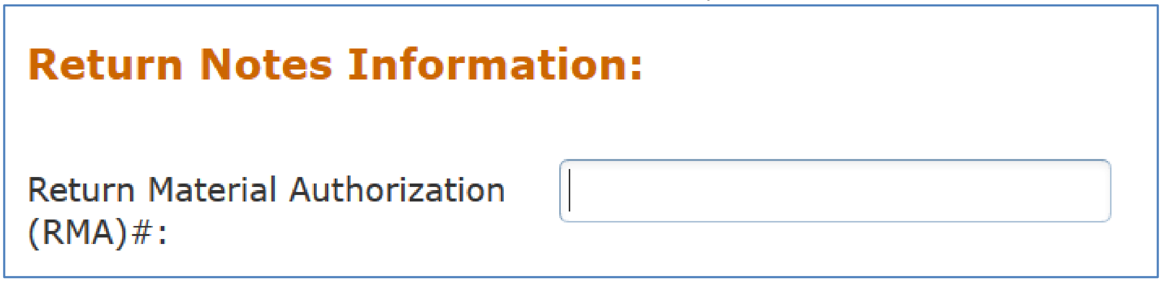
__Note:__ *The date has to be between the date on which requisition was made and the date when the goods were received.*

9. Click **Add Attachment(s)** to upload an attachment.

10. Select **Is this the last goods receipt for this order?** checkbox if you are creating a receipt for the last set of goods received.

11. If you select the **Is this the last goods receipt for this order?** checkbox, the **Allow creating invoices for this order?** checkbox will be enabled.

12. Select the **Allow creating invoices for this order?** checkbox if you want to allow creation of invoices for this order.
13. If there are any return items, then a new section **Return Notes Information** will appear.
14. Enter a **Return Material Authorization** number so as to identify the return notes.

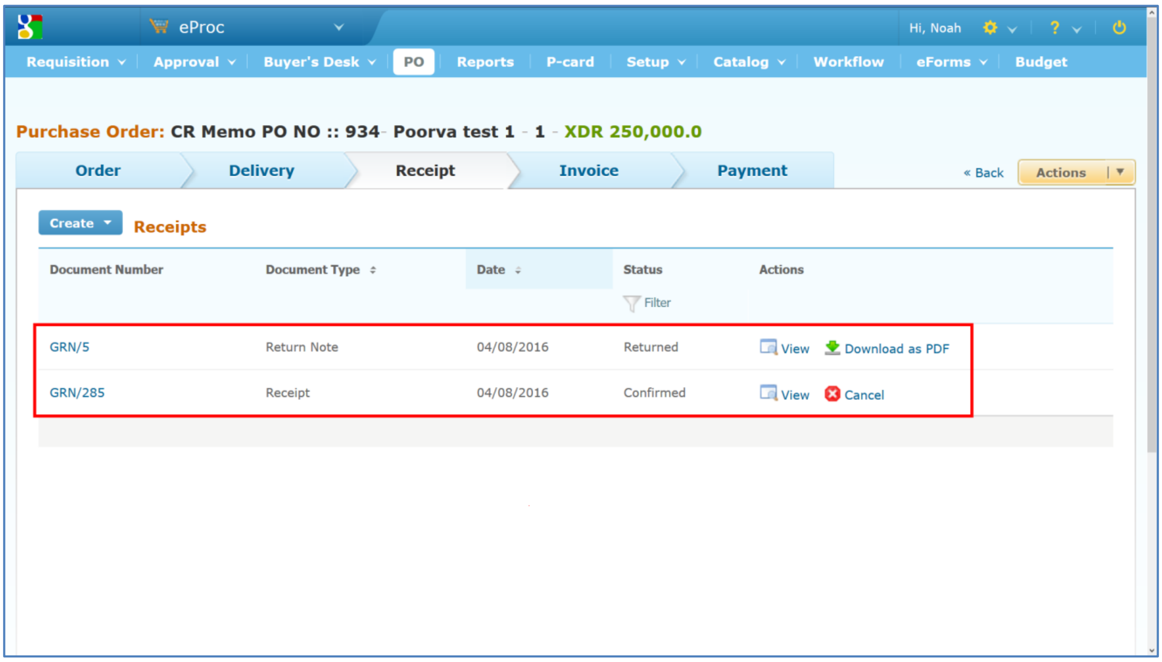


15. Click **Save as Draft** to save the receipt.

OR

16. Click **Submit** to submit the receipt.

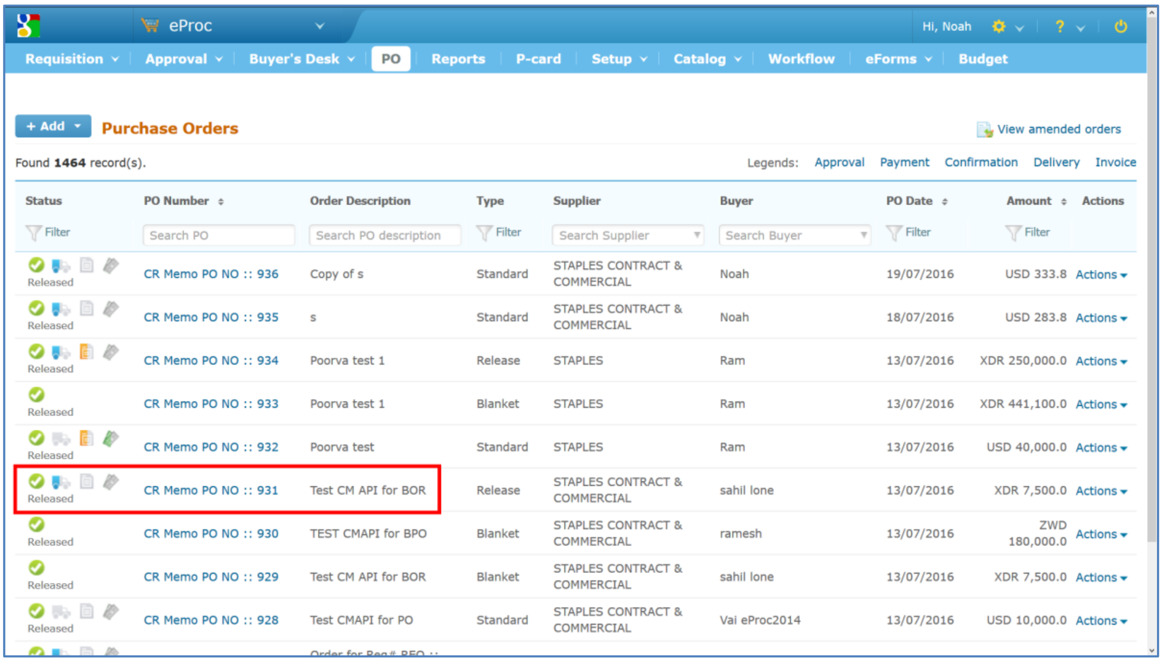
17. On submitting a receipt, a Return Notes will be auto-created as shown below:



Note: When an **Automatic Return Note** is generated, the supplier will be notified automatically.

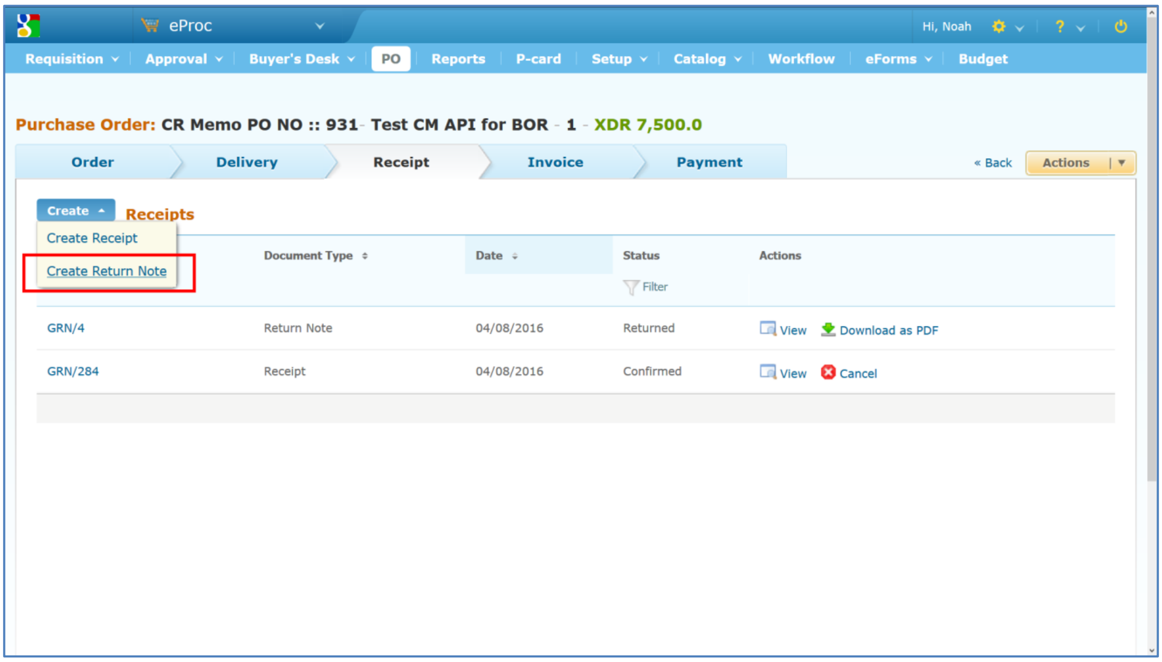
7.3.4.2 Creating Return Note

1. To create a return note manually, go to the PO tab.
2. For a given **PO** in **Released** stage, click on **PO Number.**



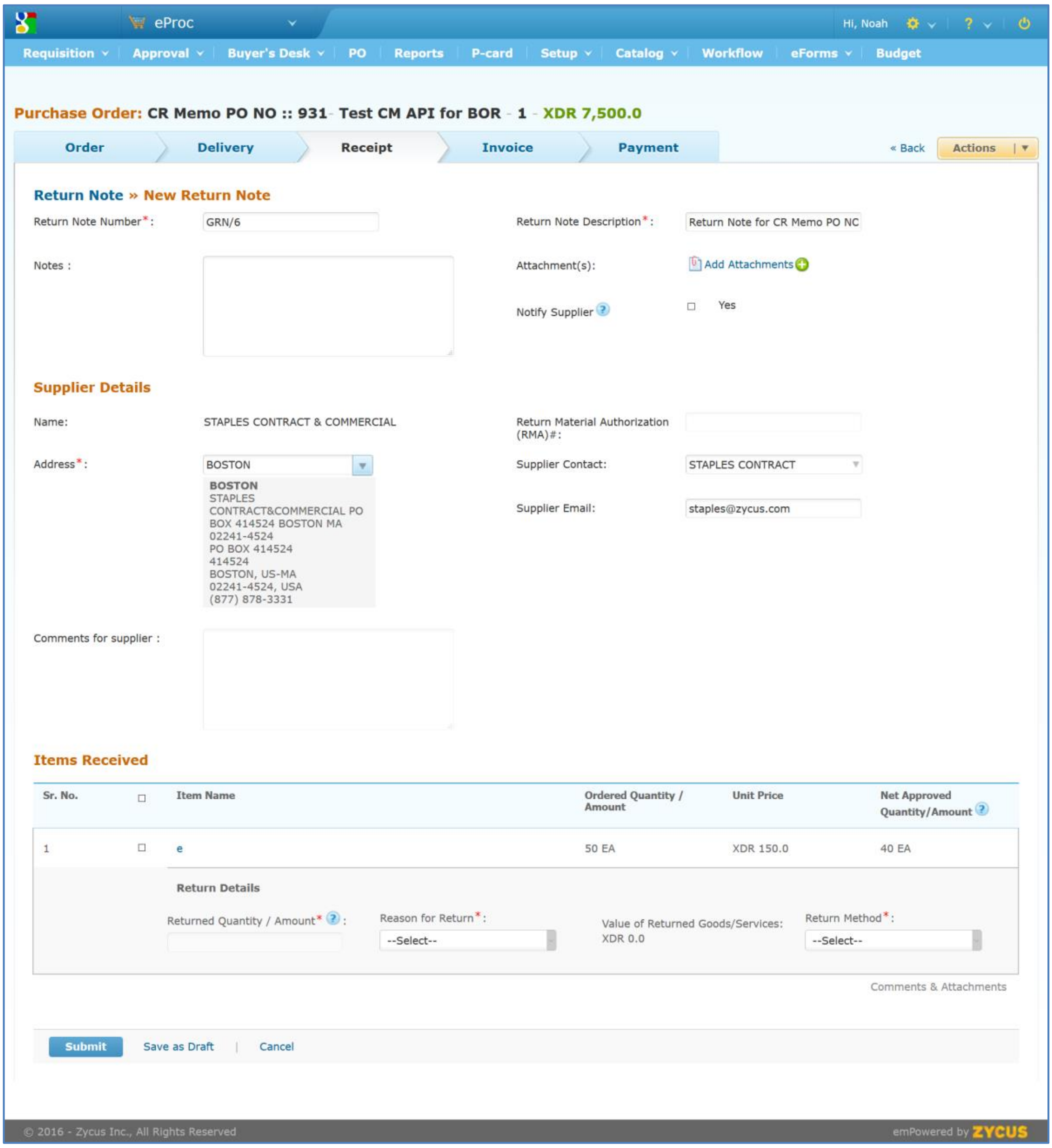
3. Traverse to the **Receipts** tab, hover on **Create** and click **Create Return Note** as shown below:

Provide Feedback



Note: Return Note can only be created if any of the received items on the order has an accepted quantity > 0.

4. On clicking **Return Note**, a new section will appear to add in the information for the returned quantity as shown below:

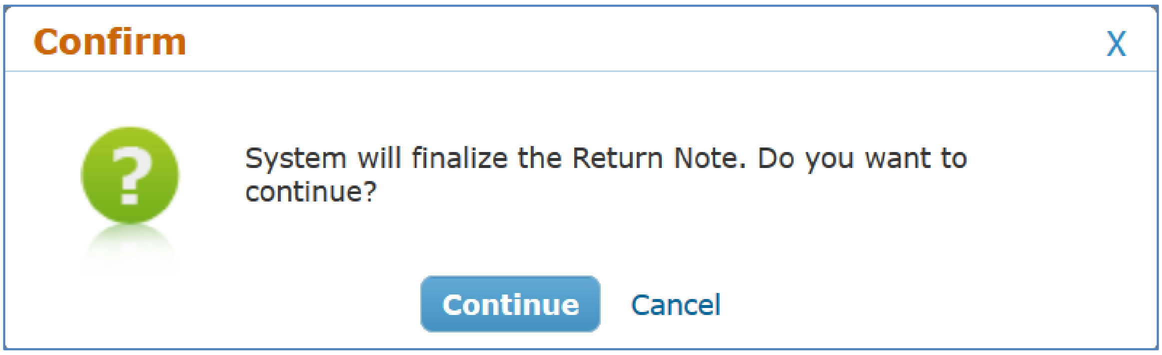


5. Mandatory fields like **Return Note Number** and **Return Note Description** will be auto filled. However they can be edited.
6. You can add **Notes** and **Attachments** while creating a return note.
7. You can choose whether to notify the supplier or not about the returned items by checking the box against **Notify Supplier**.
8. Enter the **Supplier Details.**
9. In the **Items Received** section,
   - Select a line item
   - Enter the **quantity/amount** to return
   - Enter the **reason** for returning
   - Enter the **method** for returning
10. Click **Save as Draft** to save the return note.

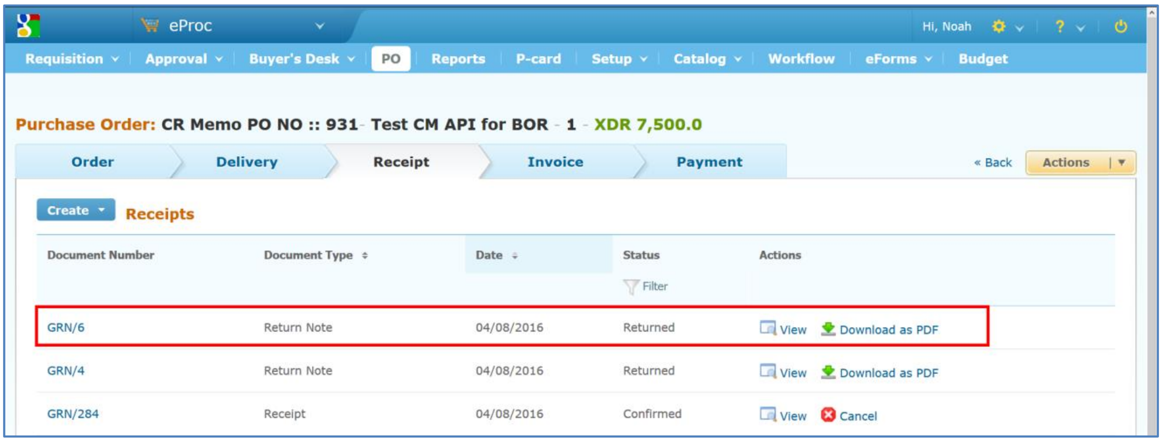
Provide Feedback

OR

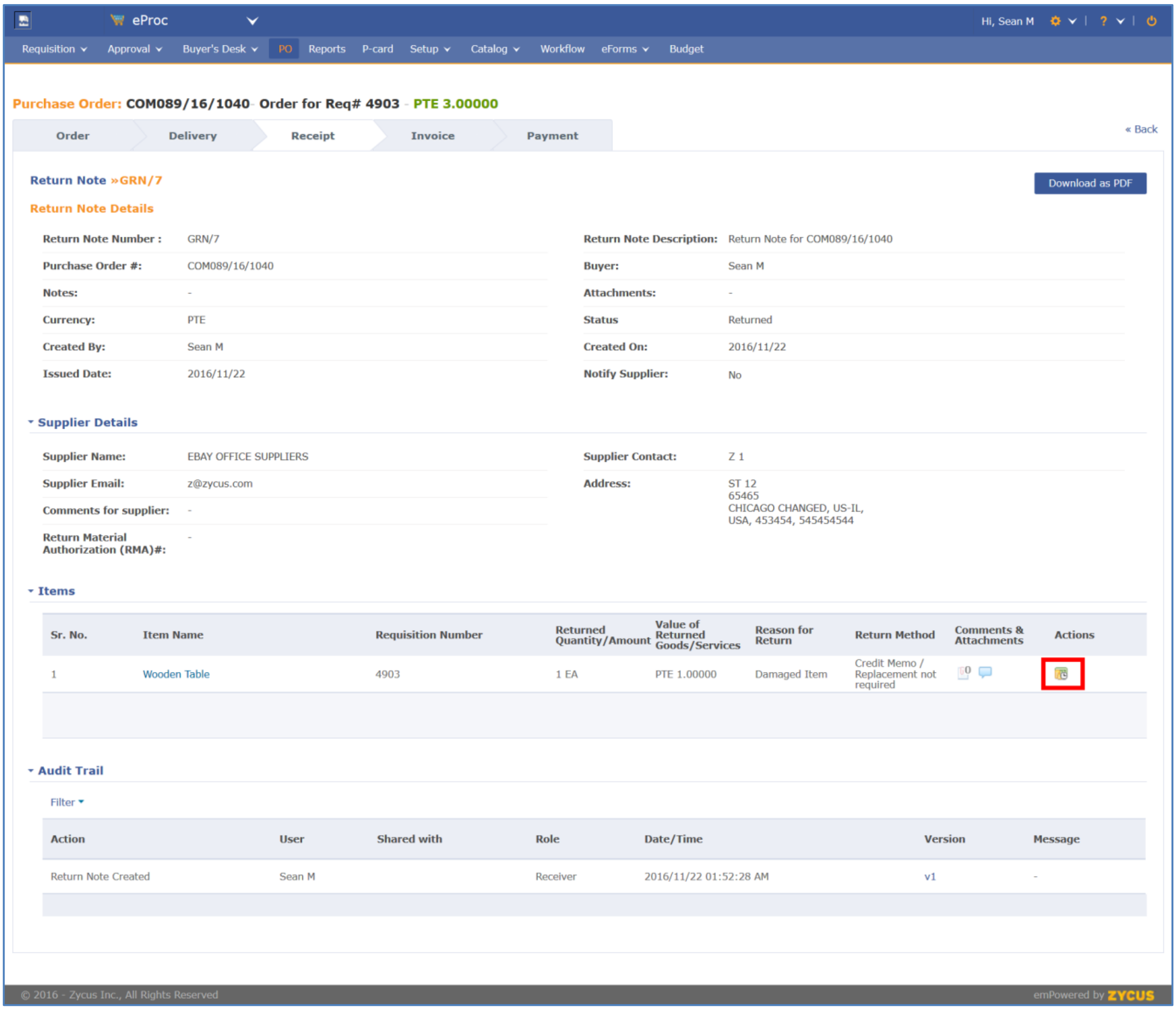
11. Click **Submit** to submit the return note.
12. On clicking Submit, the system will finalize the return note. You will be notified about the same as shown below:



13. Click **Continue.** A new return note will be created and listed under the **Receipts** tab as shown below:

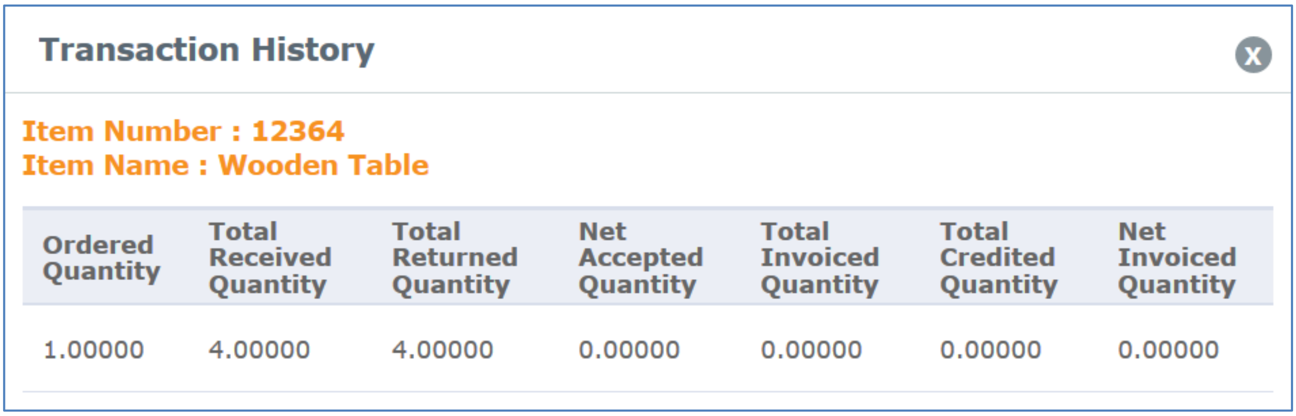


14. You can choose to **View** the **Return Notes**.



15. In the summary of **Return Notes**, under the Items section, you will be able to view the **Transaction History** of the items.

16. Click on the  icon under the **Actions** column in the **Items** table *(highlighted in the image above)*. Following popup will appear:



17. You can choose to **Download** the **Return Notes** as **PDF.**

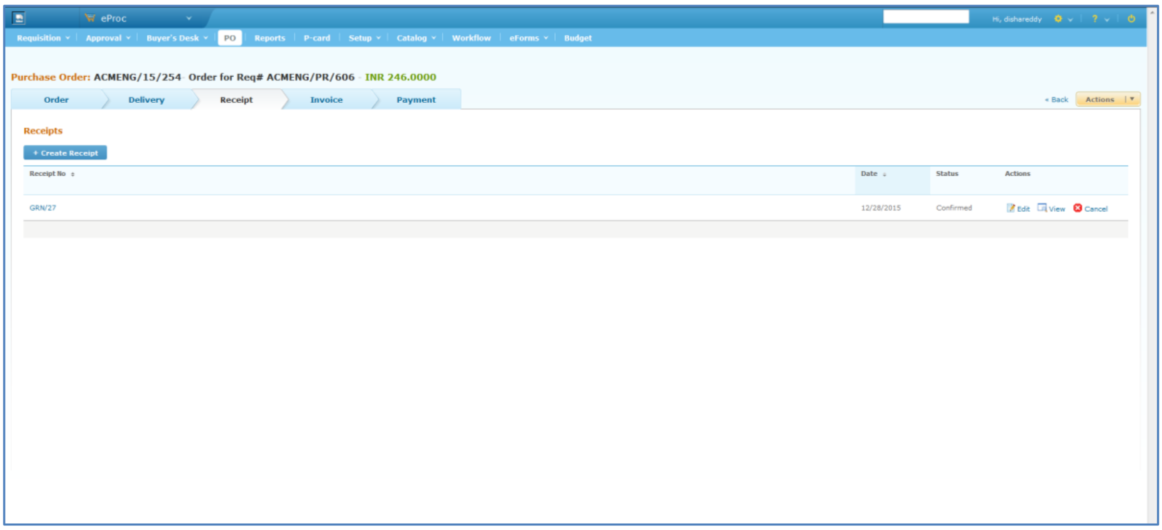
Provide Feedback

Note: **Return Notes** can be created for **Blanket Purchase Order** as well.

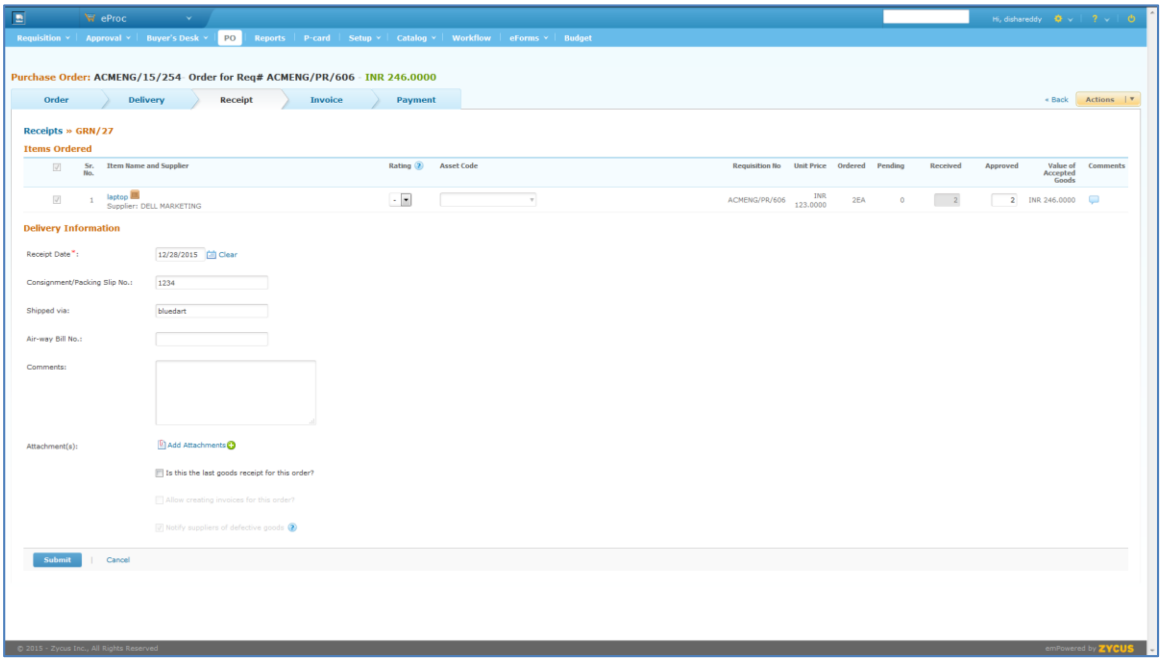
7.3.5 Ability to edit Goods Receipt

1. The user can edit the receipts created by them to accommodate any change in the approved quantity of goods received.

2. A new action, to **Edit** the receipt has been introduced against the receipt number as shown in the following figure:

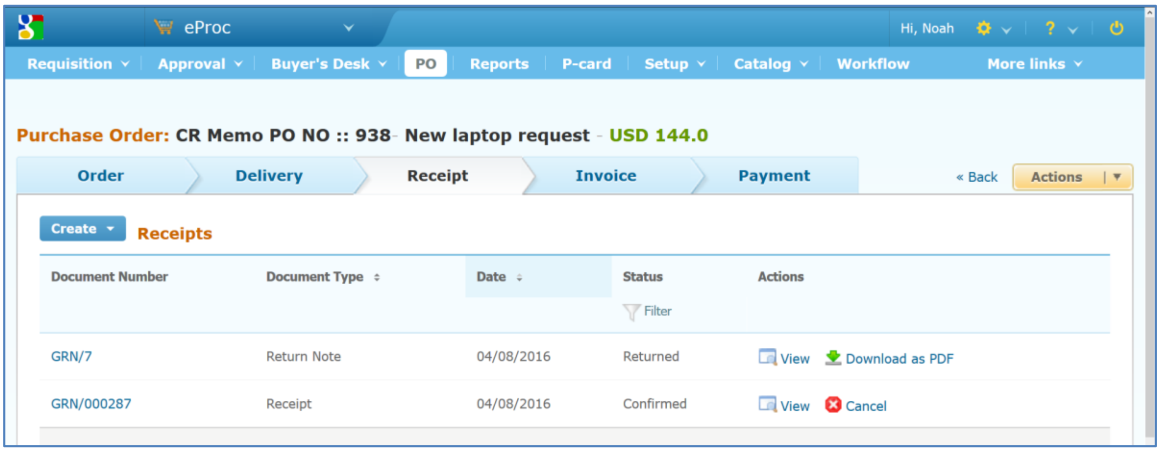


3. Once the user clicks on Edit as shown in Figure, the user can edit the **Approved** quantity (in case the goods are not up to the expected quality) up to the **Received** quantity and the **Delivery** Information details as shown in the following figure.

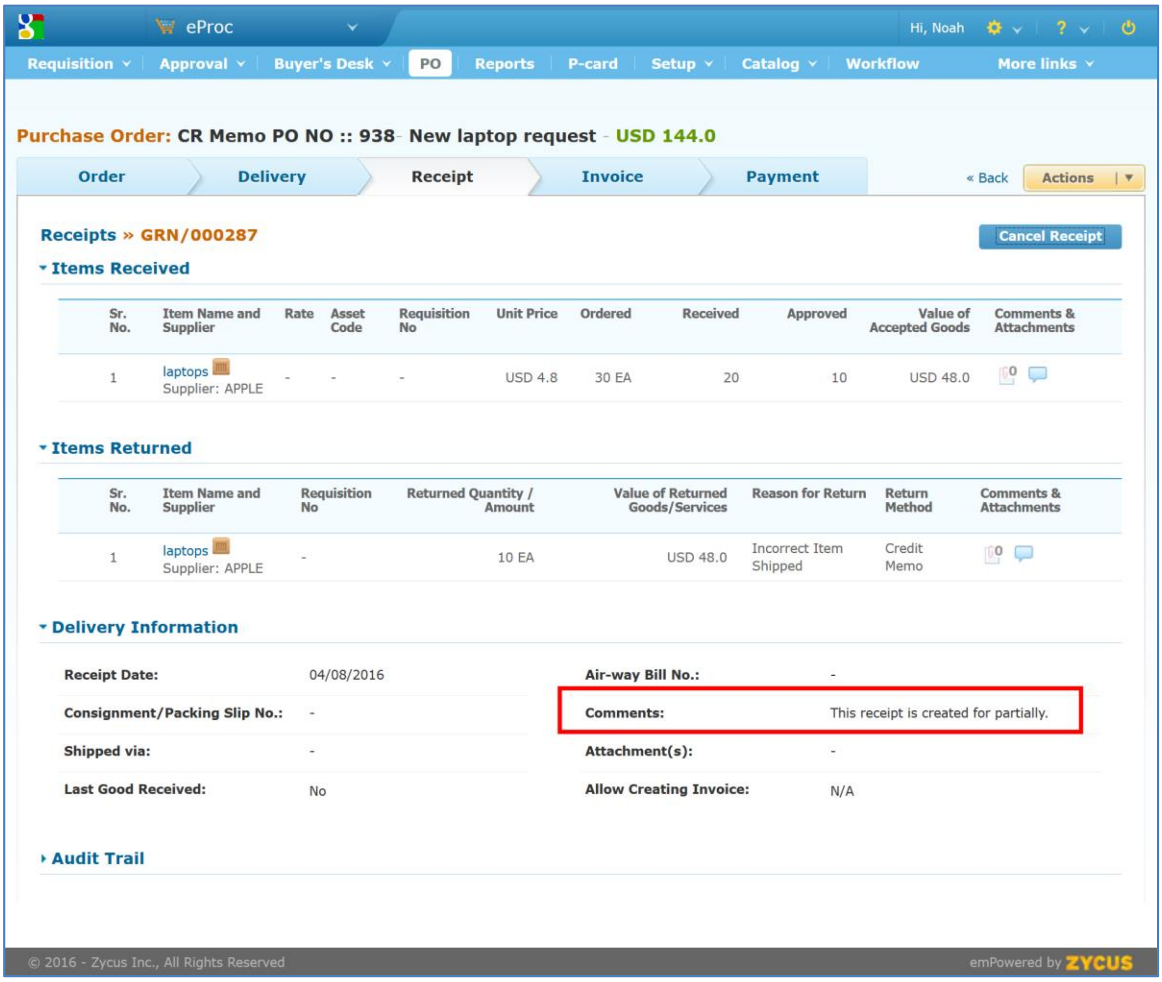


7.3.6 ***Viewing Receipts***

1. To view receipts, for a released PO, click on the PO Number. Traverse to the **Receipts** tab. If the receipt is created, it will be listed as shown below:



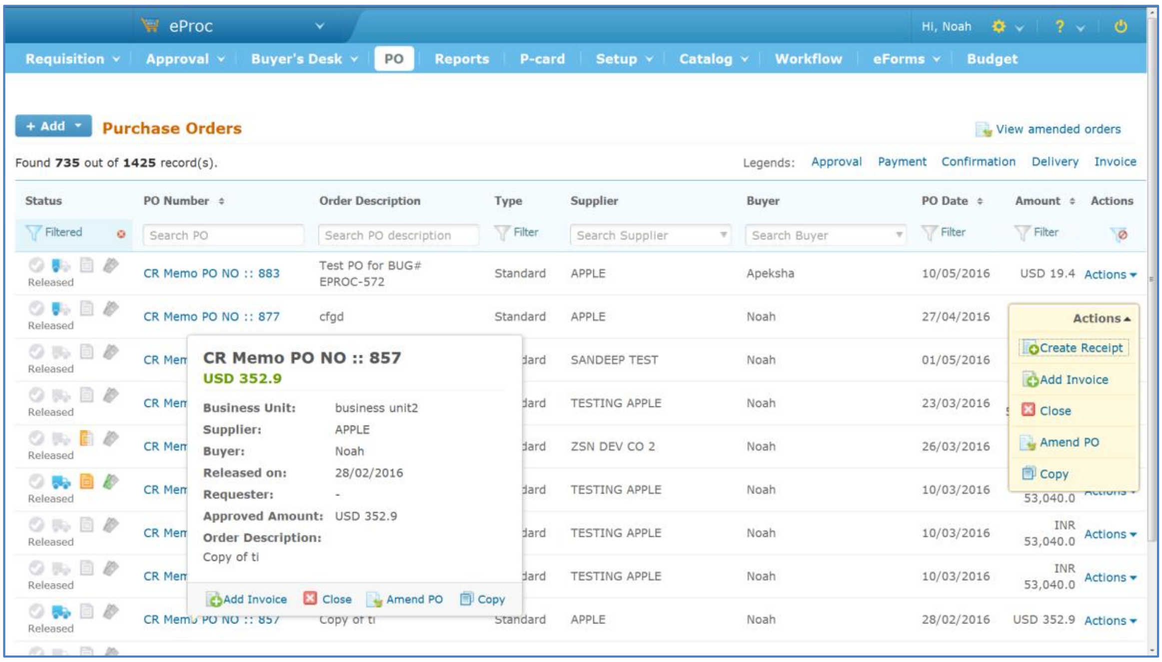
2. Click on the **Receipt Number.** The receipt will be displayed.



Note: Any (internal) comments added for a line item will visible in the receipts *(highlighted in the image above)*.

7.3.7 Creating Invoice

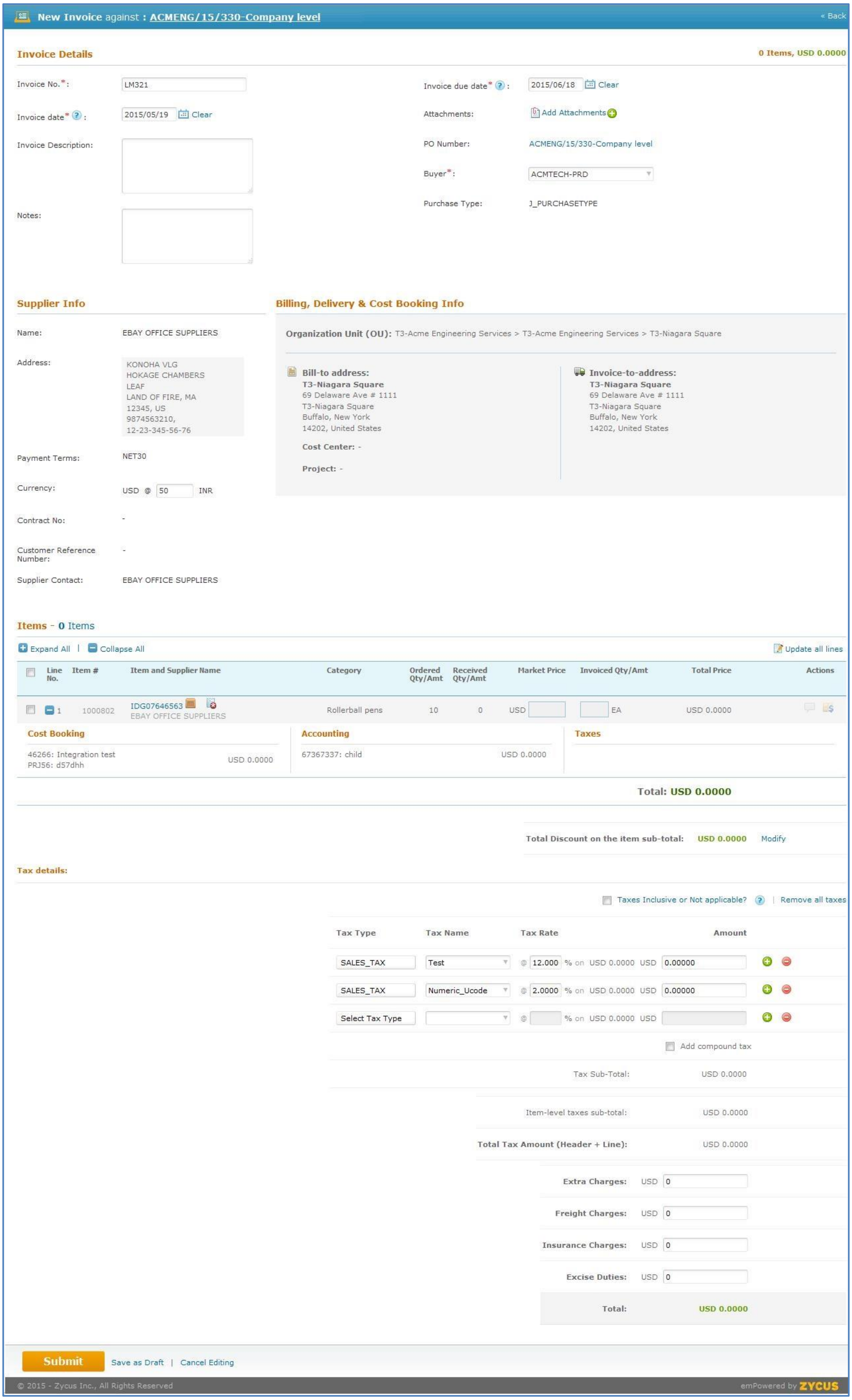
To create a new Invoice:



1. Under **Actions** click **Create Invoice** for the corresponding PO.

OR

2. Hover the mouse over the respective PO number, details of the PO are displayed, click **Create Invoice**.

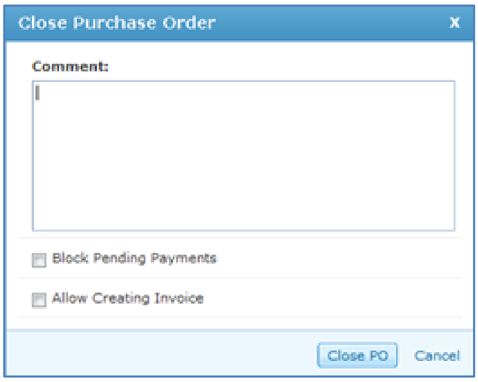

New Invoice against : ACMENG/15/330-Company level
« Back
Invoice Details
0 Items, USD 0.0000
Invoice No.*: LM321
Invoice due date*: 2015/06/18 Clear
Invoice date*: 2015/05/19 Clear
Attachments: Add Attachments
Invoice Description:
PO Number: ACMENG/15/330-Company level
Buyer*: ACMTECH-PRD
Purchase Type: J_PURCHASETYPE
Notes:
Supplier Info
Billing, Delivery & Cost Booking Info
Name: EBAY OFFICE SUPPLIERS
Organization Unit (OU): T3-Acme Engineering Services > T3-Acme Engineering Services > T3-Niagara Square
Address: KONOHA VLG HOKAGE CHAMBERS LEAF LAND OF FIRE, MA 12345, US 9874563210, 12-23-345-56-76
Bill-to address: T3-Niagara Square 69 Delaware Ave # 1111 T3-Niagara Square Buffalo, New York 14202, United States
Invoice-to-address: T3-Niagara Square 69 Delaware Ave # 1111 T3-Niagara Square Buffalo, New York 14202, United States
Cost Center: -
Project: -
Payment Terms: NET30
Currency: USD @ 50 INR
Contract No: -
Customer Reference Number: -
Supplier Contact: EBAY OFFICE SUPPLIERS
Items - 0 Items
Expand All | Collapse All
Update all lines
Line No. | Item # | Item and Supplier Name | Category | Ordered Qty/Amt | Received Qty/Amt | Market Price | Invoiced Qty/Amt | Total Price | Actions
1 | 1000802 | IDG07646563 EBAY OFFICE SUPPLIERS | Rollerball pens | 10 | 0 | USD | EA | USD 0.0000
Cost Booking
46266: Integration test PRJ56: d57dhh USD 0.0000
Accounting
67367337: child USD 0.0000
Taxes
Total: USD 0.0000
Total Discount on the item sub-total: USD 0.0000 Modify
Tax details:
Taxes Inclusive or Not applicable? | Remove all taxes
Tax Type | Tax Name | Tax Rate | Amount
SALES_TAX | Test | @ 12.000 % on USD 0.0000 USD 0.00000
SALES_TAX | Numeric_Ucode | @ 2.0000 % on USD 0.0000 USD 0.00000
Select Tax Type | | @ % on USD 0.0000 USD
Add compound tax
Tax Sub-Total: USD 0.0000
Item-level taxes sub-total: USD 0.0000
Total Tax Amount (Header + Line): USD 0.0000
Extra Charges: USD 0
Freight Charges: USD 0
Insurance Charges: USD 0
Excise Duties: USD 0
Total: USD 0.0000
Submit
Save as Draft | Cancel Editing
© 2015 - Zycus Inc., All Rights Reserved
emPowered by ZYCUS

3. Enter the details under Invoice details, Supplier Info, Items and Tax Details panels. Fields under Billing, Delivery & Cost Booking Info are auto populated from the supplier details.
4. Click **Submit** to create Invoice against the selected PO else click **Save as Draft** and submit later.

7.3.8 Closing a PO

To close PO:

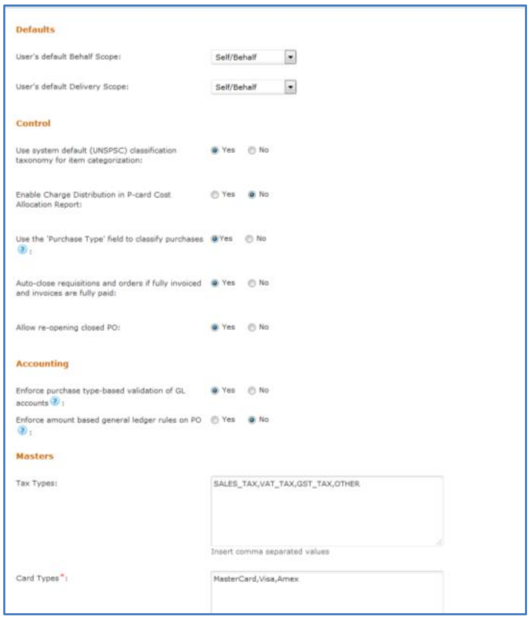
1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Close** option. The following **Close Purchase Order** dialog box is displayed.



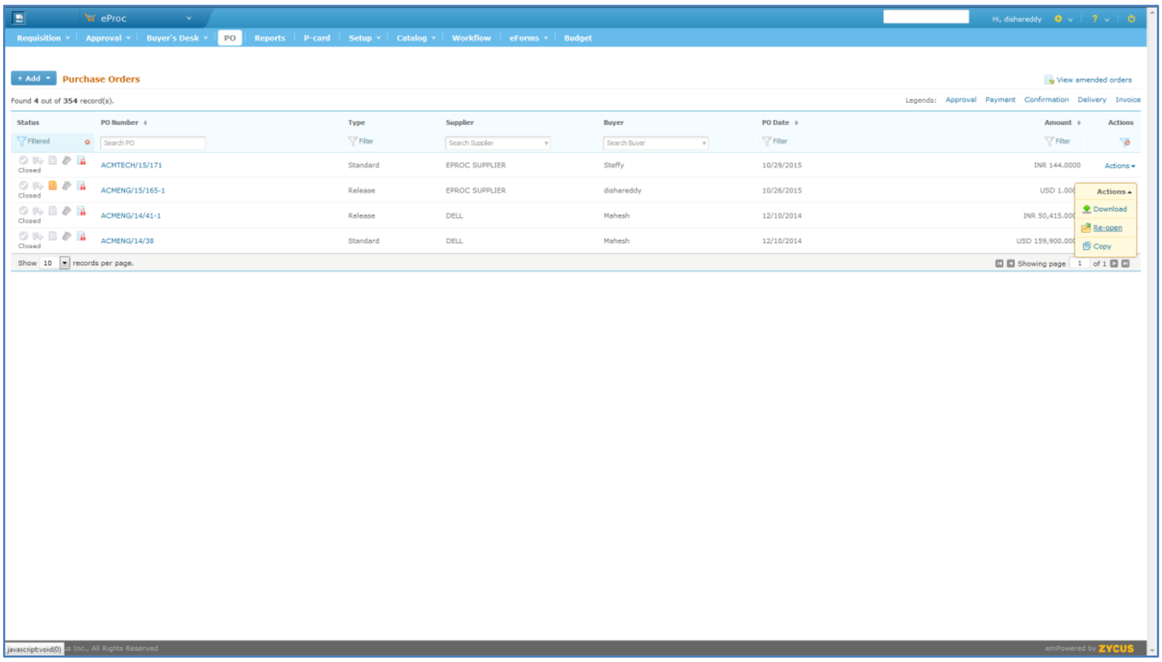
3. Enter comment in the **Comment** box.
4. Select **Block Pending Payments** checkbox if you wish to block all the payments for the order.
5. Select **Allow Creating Invoice** checkbox if you wish to allow creating new invoice for the order after the PO is closed.
6. Click **Close PO** to close the purchase order.

7.3.9 Allowing the buyer to re-open Purchase Orders that are closed

1. Once the **Purchase Order (PO)** has been realized and closed (manually or automatically) or, if the PO is closed by mistake, it can be reopened now to make the necessary changes.
2. There is an additional admin setting under Setup->Customize->Master Data under the Control section to allow/disallow the opening of a closed PO as shown in the following screen:



3. Once the feature is enabled by the admin, the user can reopen a closed PO using the Re-open action provided in PO listing as shown in the following figure:



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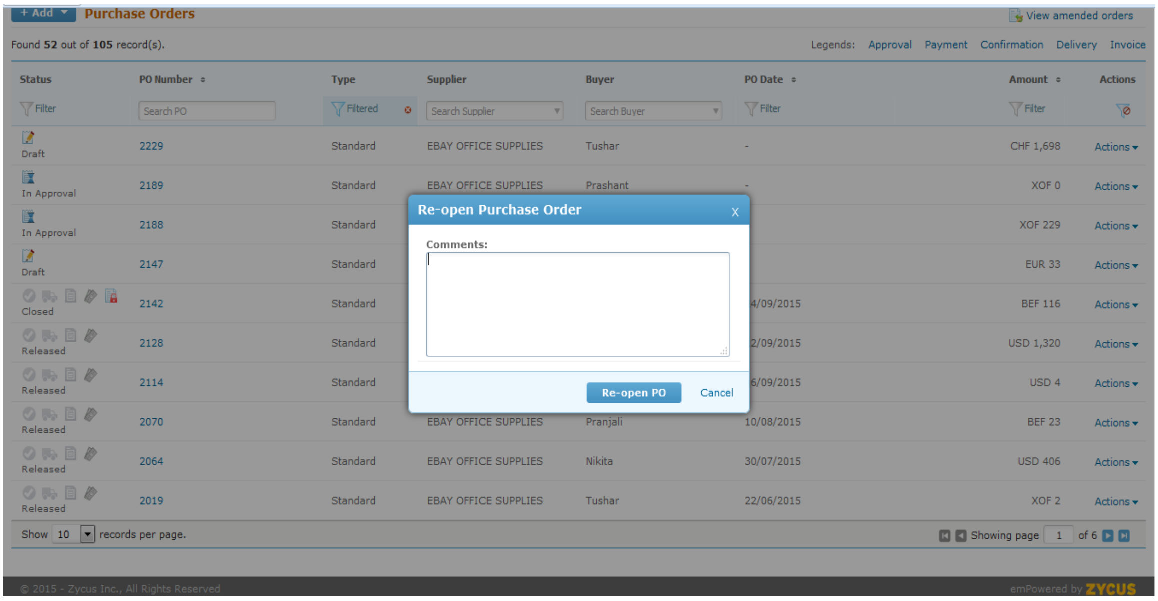
4. Once the user clicks on **Re-open** action as shown in figure, the user can give in comments before reopening it as shown in the following figure:

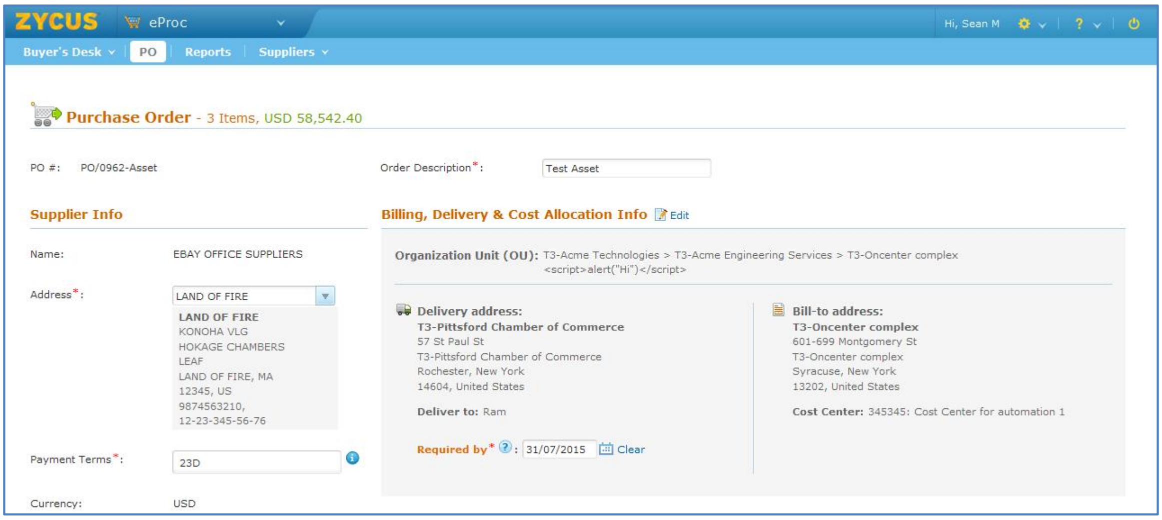


7.3.10 Amending a PO

To amend a PO or to add items to a PO from an existing requisition:

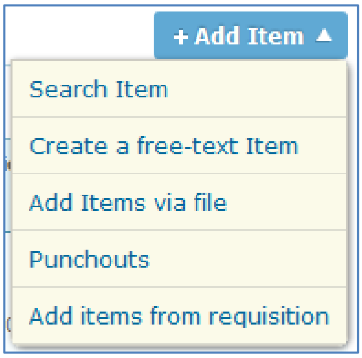
1. Search and open the required PO. Click on the **Actions** menu.

2. Select the **Amend** option. The following **Purchase Order** page is displayed.

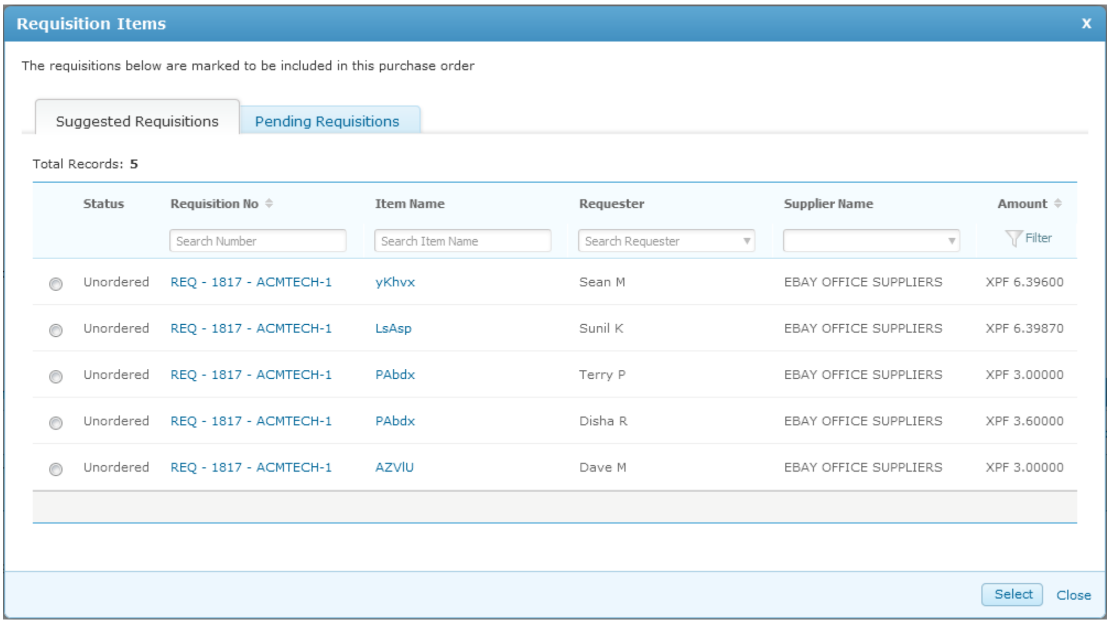


3. Click on the **Add Items** menu. The menu is expanded.

Provide Feedback



4. Select the **Add items from requisition** option. The **Requisition Items** dialog box is displayed.

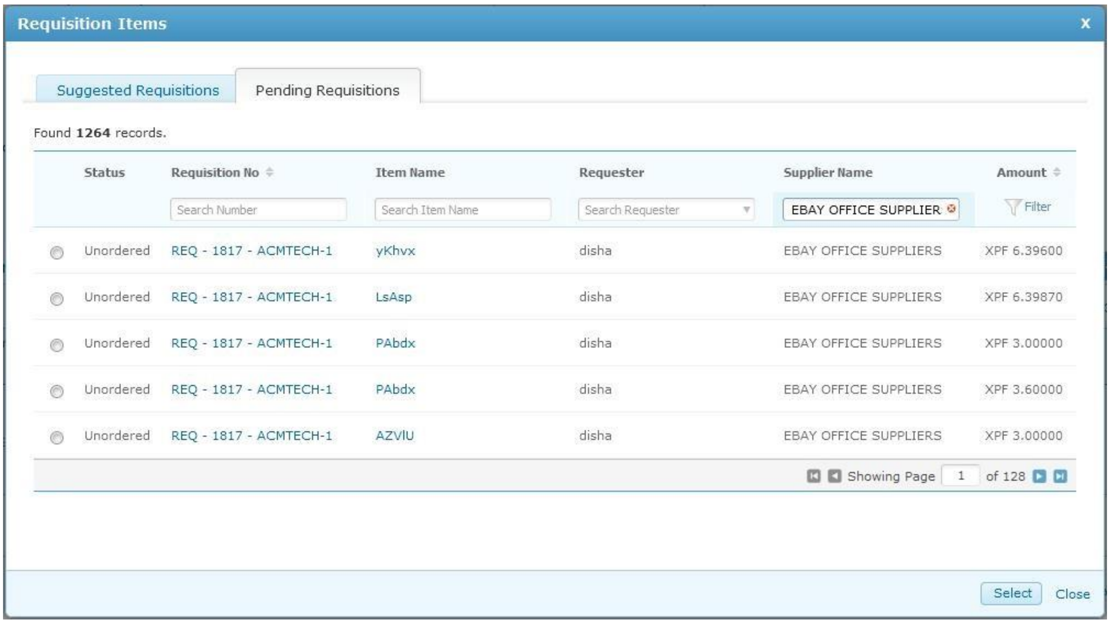


5. Search and select any one of the suggested requisitions under the **Suggested Requisitions** tab.

OR

6. Click on the **Pending Requisitions** tab. Search and select any one of the pending requisitions.

Provide Feedback



7. Click on the **Select** button to select the requisition from which the items are to be added to the PO.

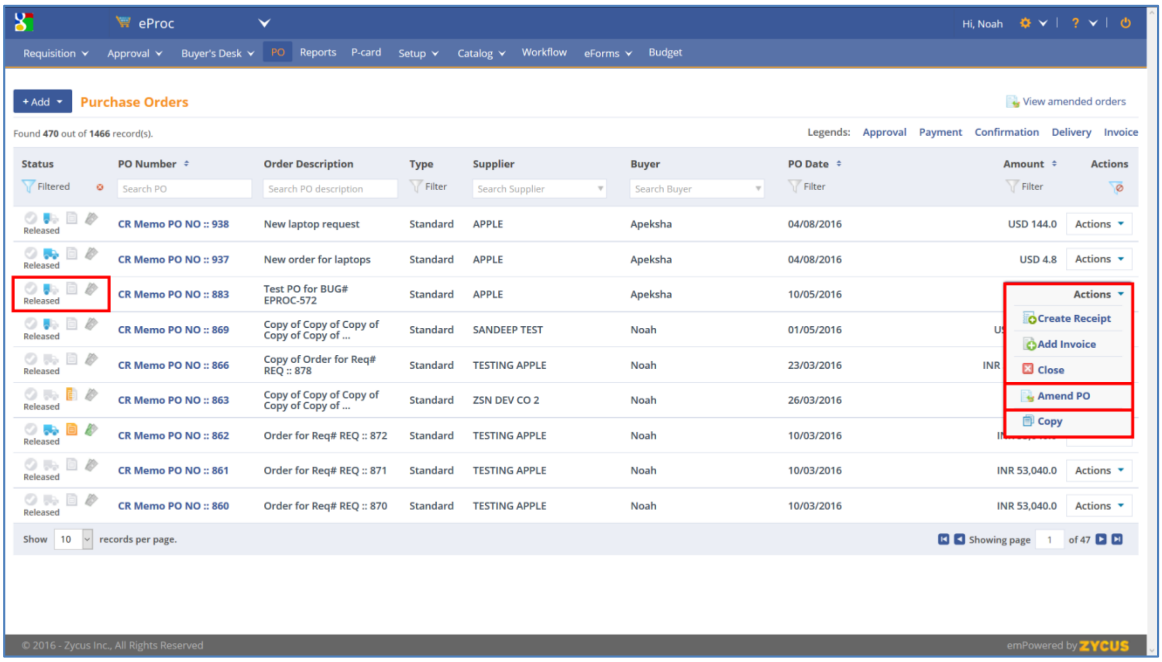
Note: *The quantity of an item in the PO can be edited or deleted by clicking on the or the icon respectively.*

Note: *Deleting an item from a PO will affect the associated requisition and the status of the requisition will change to '**Pending at Buyer's Desk**'. The '**Pending at Buyer's Desk**' status for the requisitions will have the following icon in their status field* With buyer.

7.3.10.1 Ability to Amend a PO without Supplier Confirmation

As a buyer, you will be able to amend a PO even if the supplier hasn't confirmed a PO from their side.

1. On the PO listing page, filter the status of PO as **Releases > Confirmation > Unconfirmed**.
2. All the PO's without supplier confirmation will be listed.
3. You will be able to amend those PO from the actions drop down menu as shown in the image below:



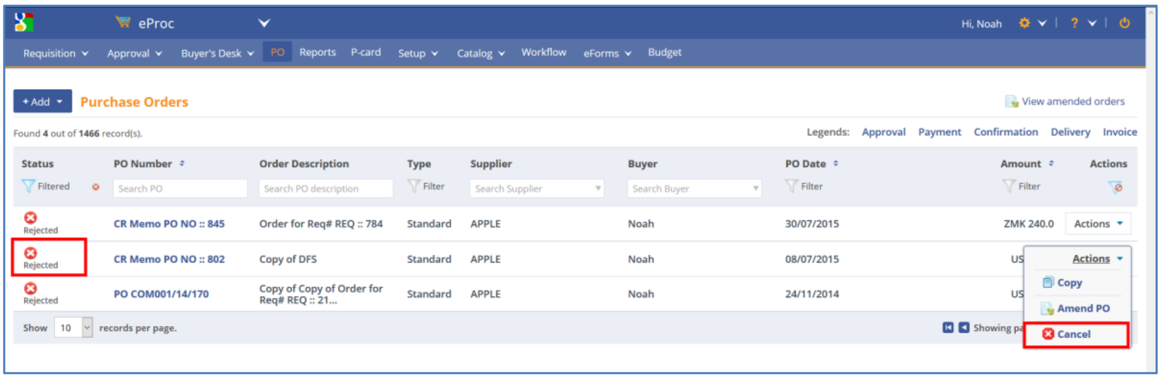
4. The amended PO will not be auto-accepted on the supplier side if the earlier PO was not confirmed from their side. The Supplier will have to manually accept or reject the amended order.

5. The older version of PO will lie with the Supplier and the Supplier can accept or reject it as they do now, till the PO amendment is in 'In approval' status.

6. When the amended PO is submitted, it will override the old version of the PO at both sides- the Supplier and the Buyer, once approved.

7. Any approved amended PO will override the rejected PO by supplier. Until then, the PO rejected by supplier will stay as it is.

8. You can cancel a Rejected PO, which will cancel the PO & set the status of its Requisition(s) to "With Buyer".



Provide Feedback

Chapter 8: Reports

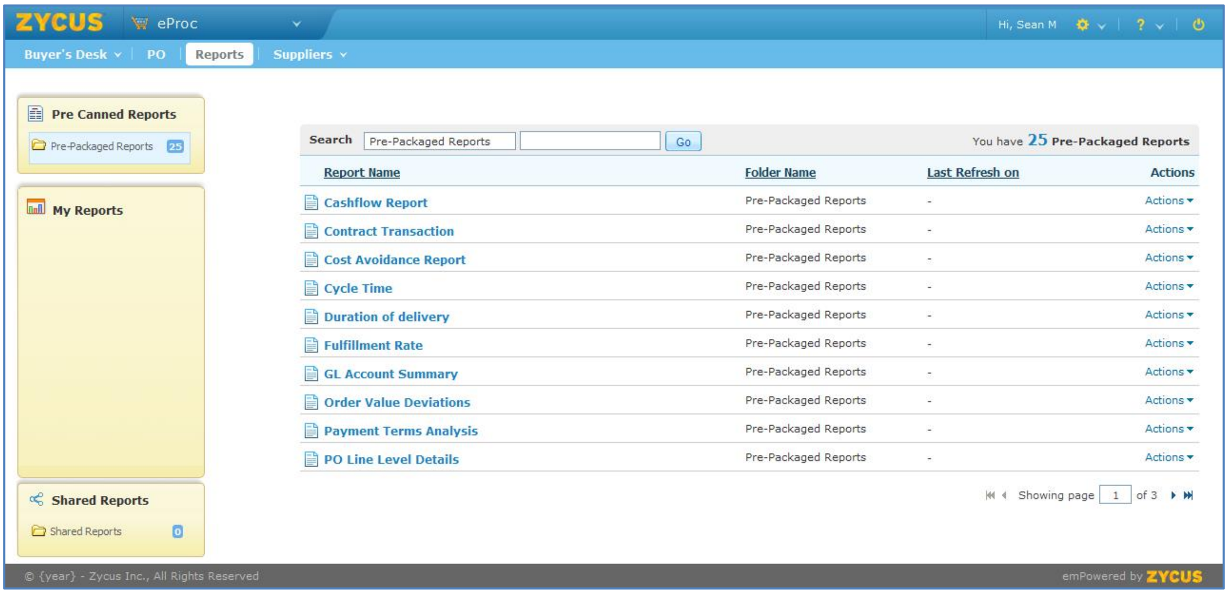
8.1 Introduction

Pre-packaged reports are readily available to users. They can modify these reports as required by changing the structure of reports to tabular, summary, or matrix report. You can export and filter data. You can also save your own reports.

8.2 Prepackaged Reports

To view the prepackaged reports:

- Click the **Reports** tab. A list of pre-packaged reports is displayed.



Provide Feedback

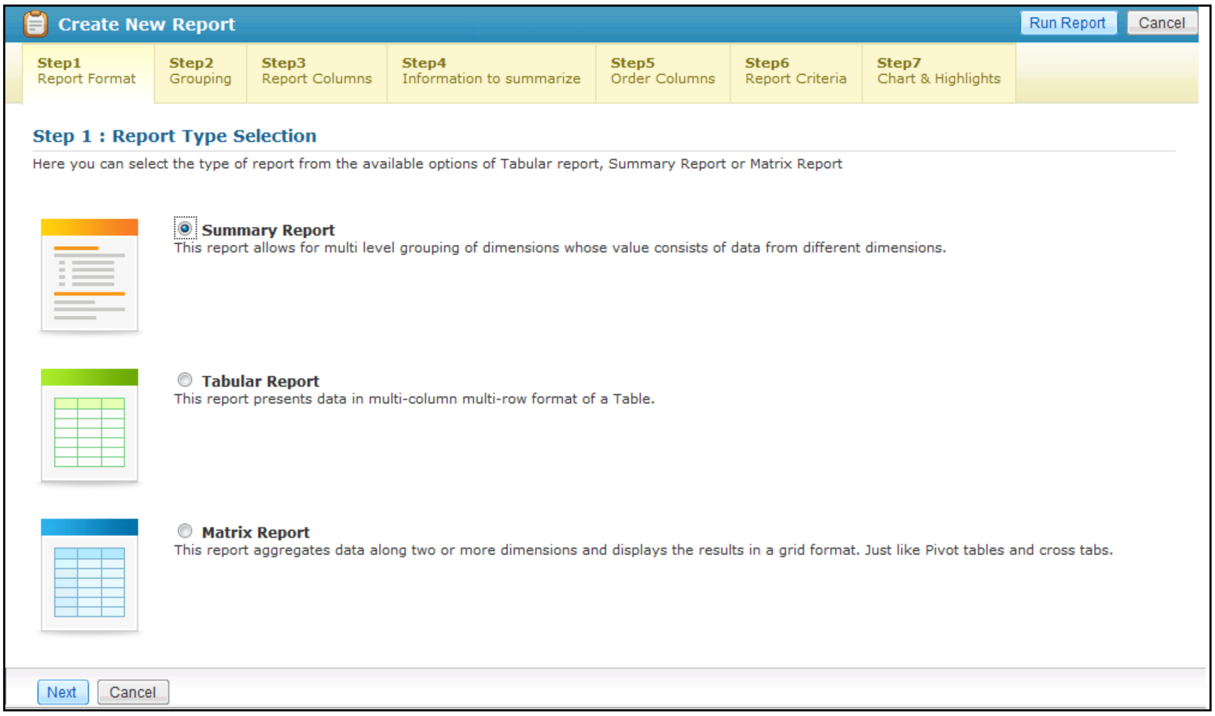
8.3 Creating a Report

You can create a report to view your data in a more systematic way. You will have to go through the following steps to create a new report:

Step 1: Report Type Selection

1. On the Reports page, click on the **Create New Report** button.

2. Select a report type and click **Next**. It goes to the next step.



Note: *If **Tabular Report** is selected, step 2 and step 7 is not applicable.*

Note: *If **Matrix Report** is selected, step 3 and step 5 is not applicable.*

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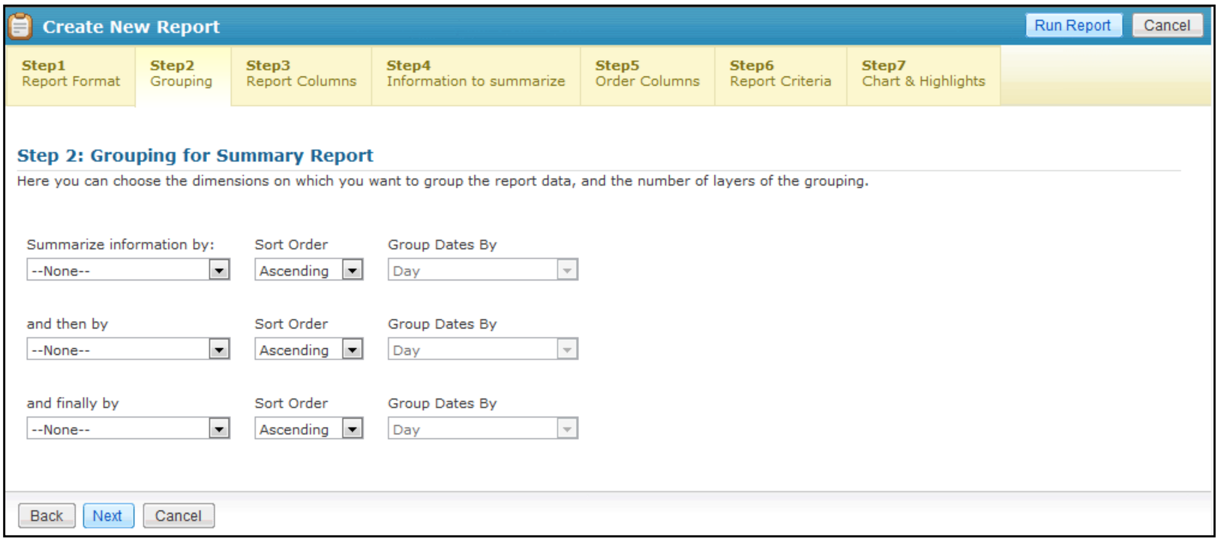
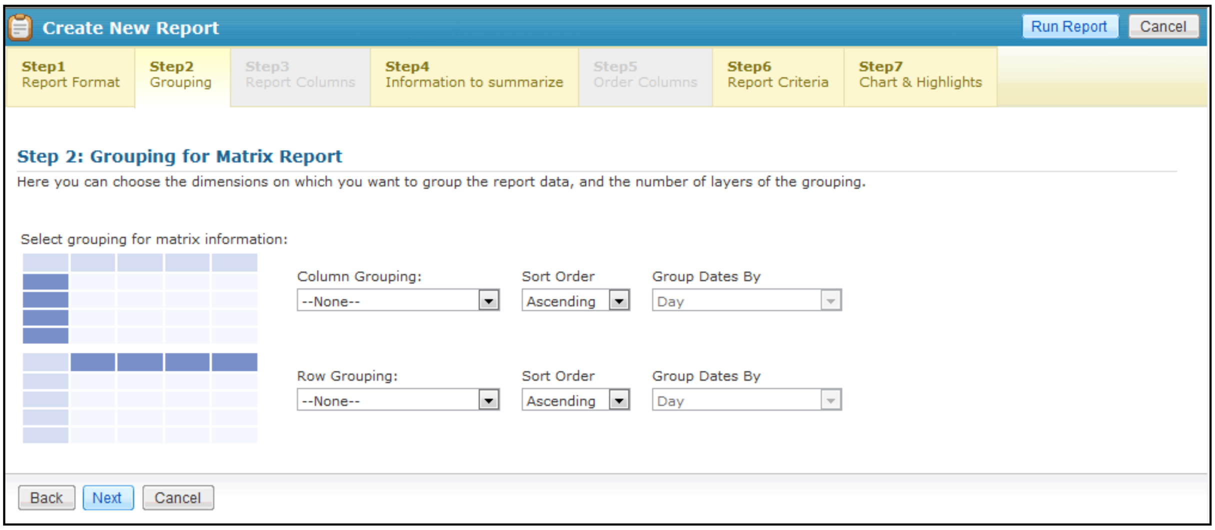
Step 2: Grouping

Grouping for Summary Report:



Grouping for Matrix Report:

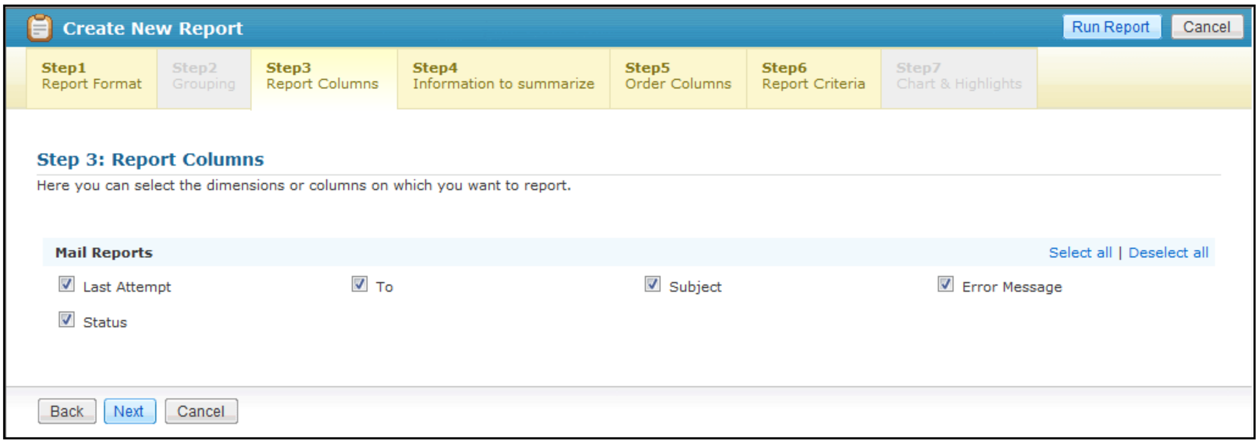


3. Set the details and click **Next**. It goes to the next step.

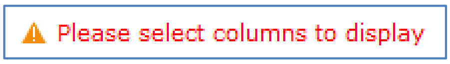
Provide Feedback

Step 3: Report Columns

4. Select the dimensions or columns on which you want the report and click **Next**.

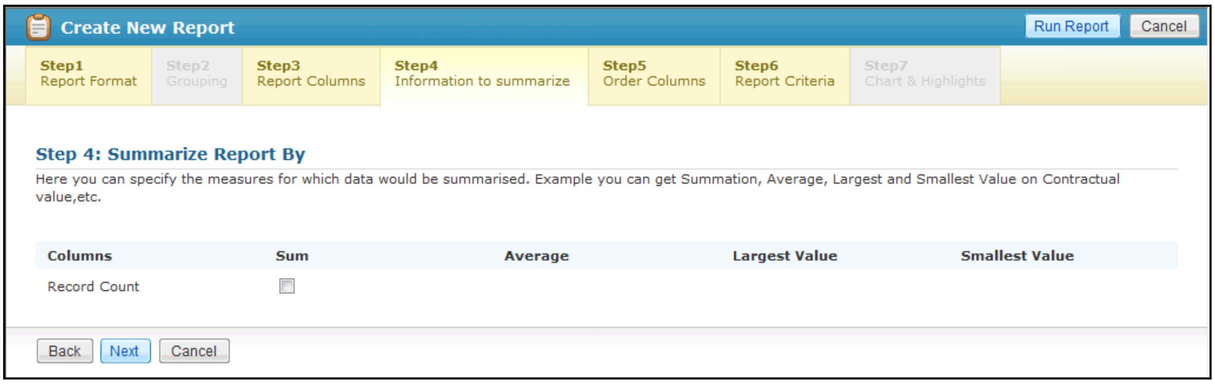


Note: *The following warning is displayed if no column is selected:*



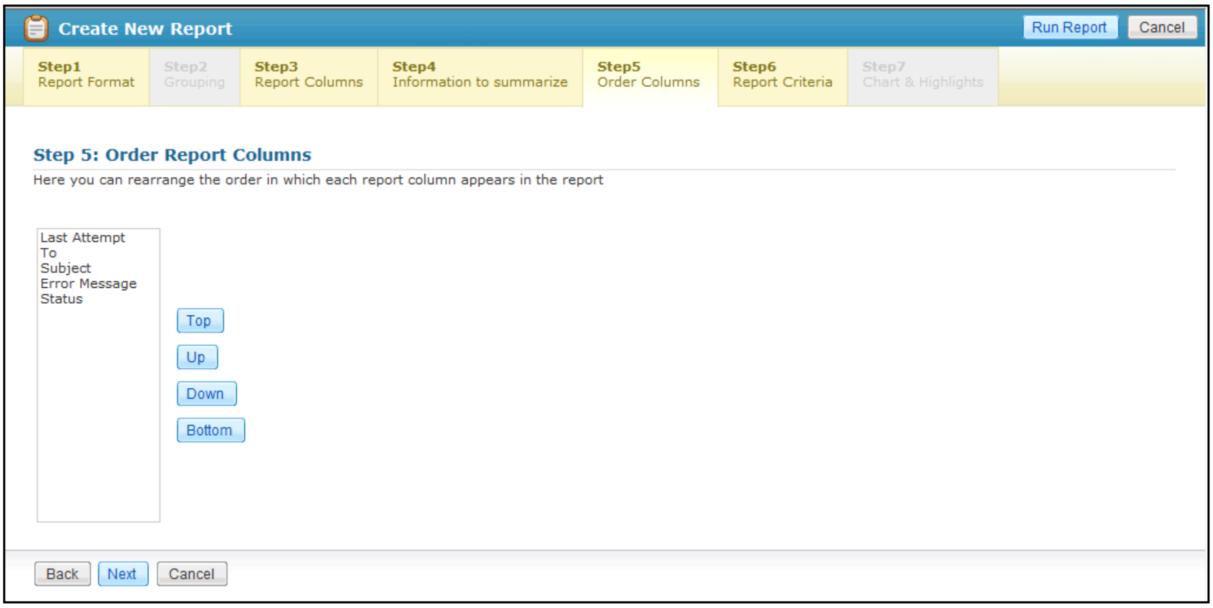
Step 4: Information to summarize

5. Select a measure to summarize your data and click **Next**.



Step 5: Order Columns

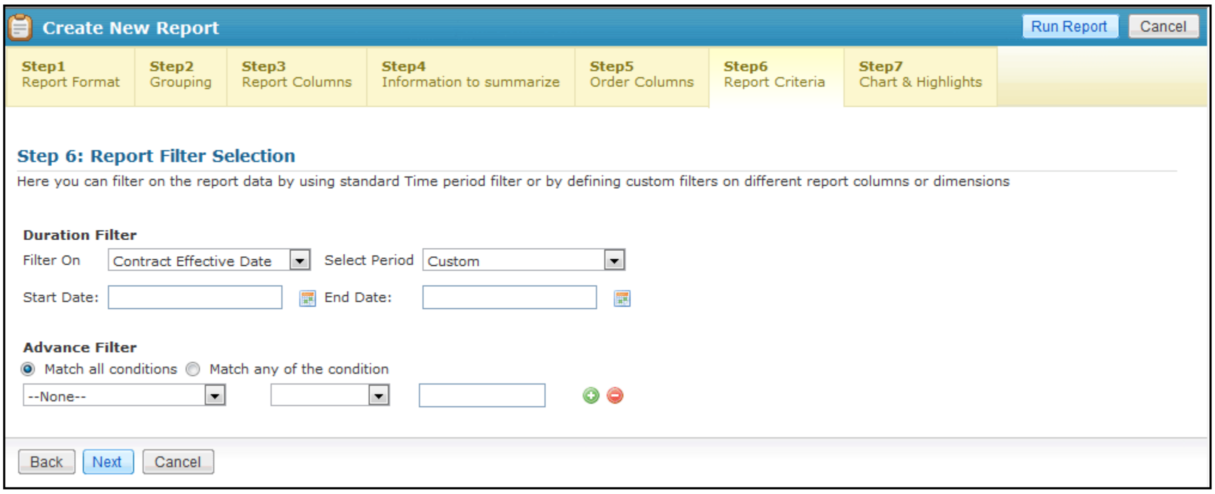
6. You can rearrange the order in which each column appears in the report.



7. Select a measure and click either **Top**, **Up**, **Down**, **Bottom** to position your measure.

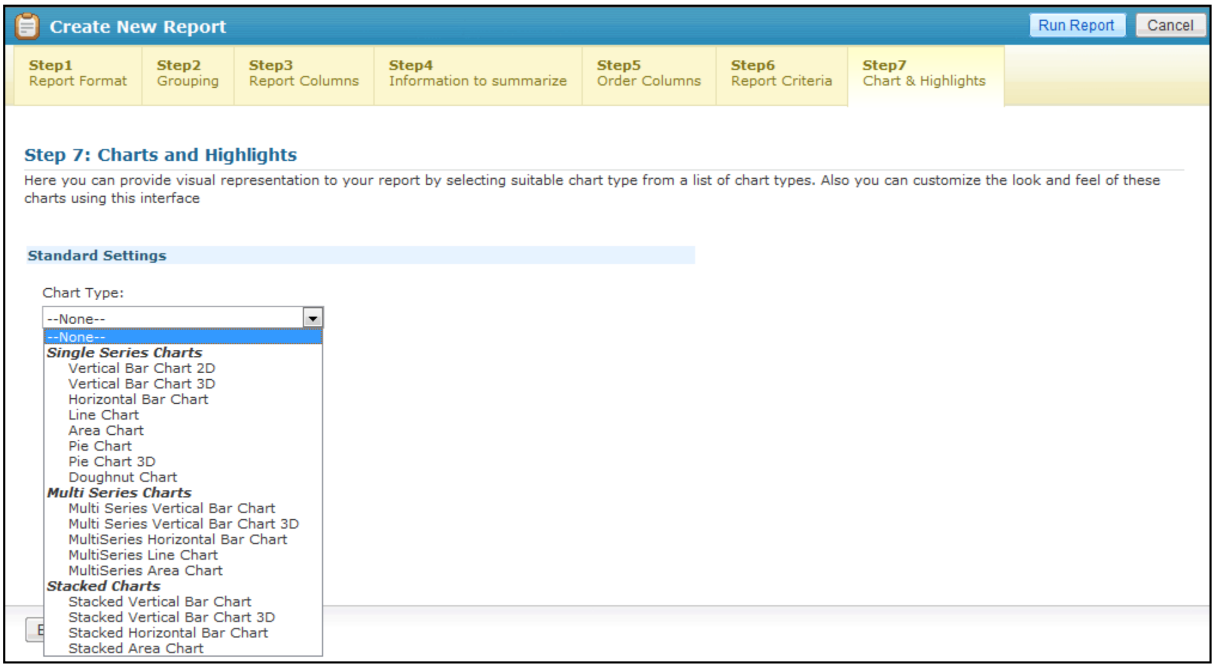
8. Click **Next** to go to the next step.

Step 6: Report Filter Selection



9. Set the conditions to view your report and click **Next**.

Step 7: Chart & Highlights



10. You can provide a visual representation to your report by selecting a chart type.

11. Select a chart type from the drop down list and click **Run Report**.

8.4 Exporting a Report

You can export the specific data of a report as a summary in Excel (.xls) or Portable Document (.pdf) formats.

To export a report:

1. Open the required report.
2. Select the **Export Data** 

icon.
3. Select the format you want to save the file to.
    - In Excel – to export the data in excel
    - In PDF – to export the data in pdf
4. Click **OK**. The **File Download** dialog box opens.
5. Click **Save** to save the file.

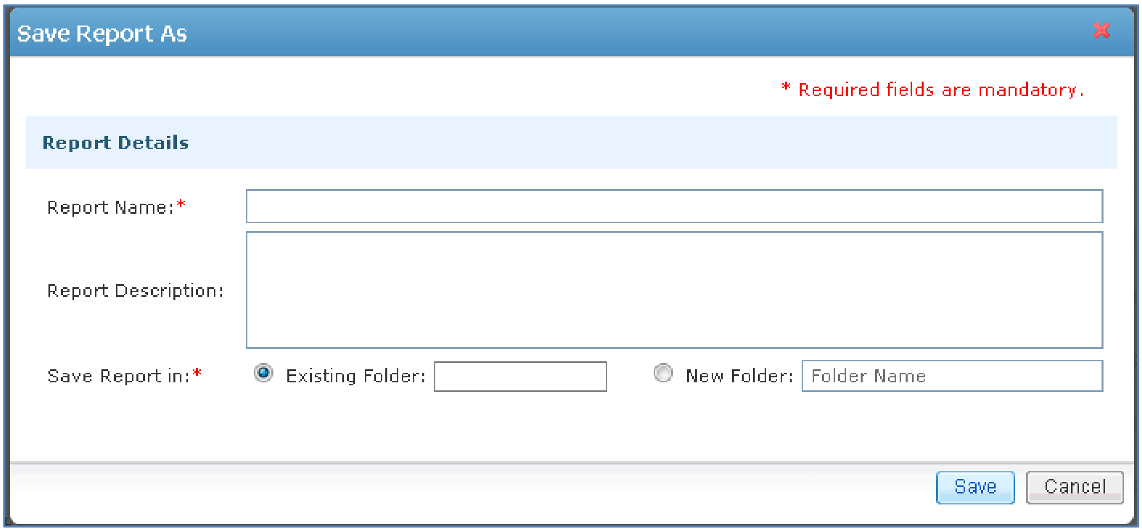
8.5 Saving a Report

You can save reports either in the pre-packaged reports folder or in a new folder.

To save a report:

1. Open the required report.

2. Click on the **Save As** button. The **Save Report** dialog box is displayed.



3. Specify the details.

4. Click **Save**. The report is saved.

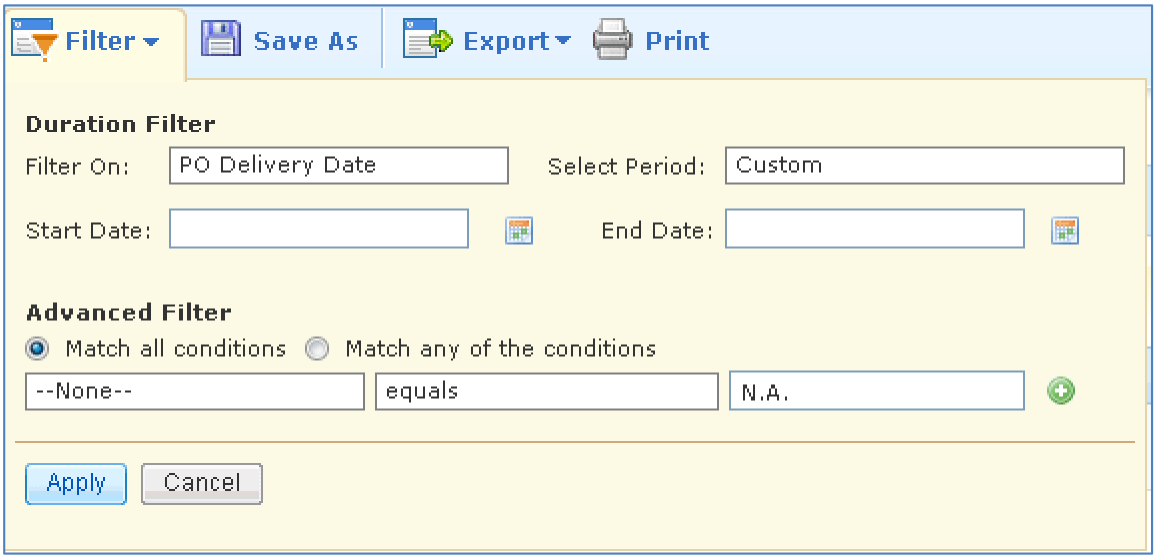
8.6 Filtering a Report

You can filter a report to view your desired result.

To filter a report:

1. Open the required report.

2. Click on the **Filter** button.



3. Set your desired requirement in the **Duration Filter** and **Advance Filter** section.

4. Click **Apply**. The report is displayed.

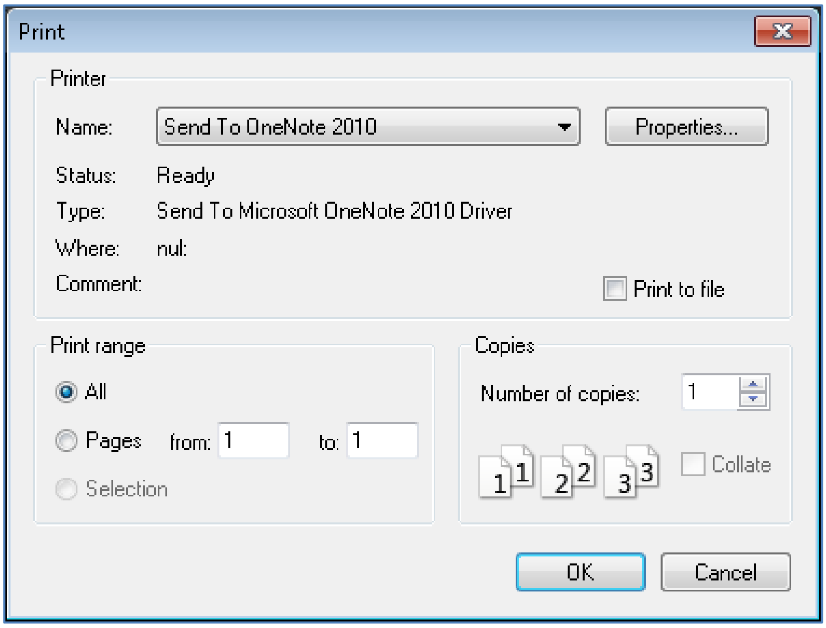
8.7 Printing a Report

You can print a report to obtain a hard copy of the report.

To print a report:

1. Open the required report.

2. Click on the **Print** button. The **Print** dialog box is displayed:



3. Set your desired requirement in the **Printer**, **Print Range** and **Copies** section.

4. Click on the **OK** button to print the report.

8.8 Modifying a Report

You can modify specific parts of an existing report as per requirements.

To modify a report:

1. Open the required report and select the **Modify** option.

2. Make the required changes within Step 1 to Step 7.

3. After the required changes are made, click on the **Run Report** button.

Provide Feedback