User Manual - Initiator Role

Purchase Requisition System v 3.0

Your Role

As an **Initiator**, you create and submit purchase requisitions.

Responsibilities

- Create new requisitions
- Submit for approval
- Track requisition status
- View reports

Getting Started

Login

1. Open browser: **http://localhost:3000**
2. Username: `john.banda` (or your username)
3. Password: `password123`
4. Change password after first login

Creating a Requisition

Step 1: Click "Create Requisition"

Step 2: Fill Basic Details

- **Title**: Brief description
- **Department**: Your department
- **Budget Code**: Cost center
- **Priority**: Normal/Urgent/Critical
- **Required By**: Delivery date

Step 3: Add Items

- Item name and description
- Quantity and unit
- Unit price and currency
- Specifications
- Justification

Step 4: Attach Documents

- Vendor quotes
- Specifications
- Supporting documents

Step 5: Submit

- **Save as Draft**: Edit later
- **Submit for Approval**: Send to HOD

Requisition Status

Status	Meaning
Draft	Not yet submitted
Pending HOD	Awaiting HOD approval
HOD Approved	Approved by HOD, sent to Finance
Finance Approved	Approved by Finance, sent to MD
MD Approved	Approved by MD, sent to Procurement
In Procurement	Being processed
PO Issued	Purchase Order created
Completed	Items delivered
Rejected	Rejected at any stage

Approval Workflow

```
You (Initiator) → HOD → Finance → MD → Procurement → PO → Delivery
```

Viewing Your Requisitions

1. Click "My Requisitions"
2. View all your requests

3. Click "View" to see details
4. Check approval history and comments

Tips for Success

Good Justification Example

```
Need 2 laptops for Finance team because:
1. Current laptops are 5 years old
2. New software requires better specs
3. Downtime costs K500/day
4. For 2 new staff starting Q1
```

What to Attach

- Vendor quotations
- Product specifications
- Price comparisons
- Budget approvals

Troubleshooting

Cannot login?

- Check username/password
- Clear browser cache
- Try different browser

Cannot submit?

- Fill all required fields
- Add at least one item
- Check prices entered

Upload failed?

- Max file size: 10 MB
- Formats: PDF, JPG, PNG, DOC, XLS

Contact Support

IT Support

- Email: support@company.com
- Phone: +260-XXX-XXXX
- Hours: Mon-Fri, 8AM-5PM

End of Initiator Manual