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Welcome to CodeIgniter Purchasing System

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Introduction

Codeigniter Purchasing system is a web-based platform that helps businesses of all sizes elevate their entire procurement process to better manage requisitions, generate purchase orders, and monitor spending with full visibility and control into their respective purchase cycle. It has seamless flow of data and customized workflows. Automating the purchasing functions can make your company competitive in its industry to not be merely transactional but strategic enough to transform the way you do business.

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Scope of Purchasing

Each employee plays an active role in the purchasing function. Many of them requisition goods and services, while others are directly involved in the purchase of such goods and services. Most of what they use in their daily work, from the paper they write on to the wax on the floors has been acquired through Purchasing. Since everyone is involved in purchasing, the Purchasing Department, in accordance with their own existing policies will determine and clarify what is expected of each involved in the purchase of goods and services.
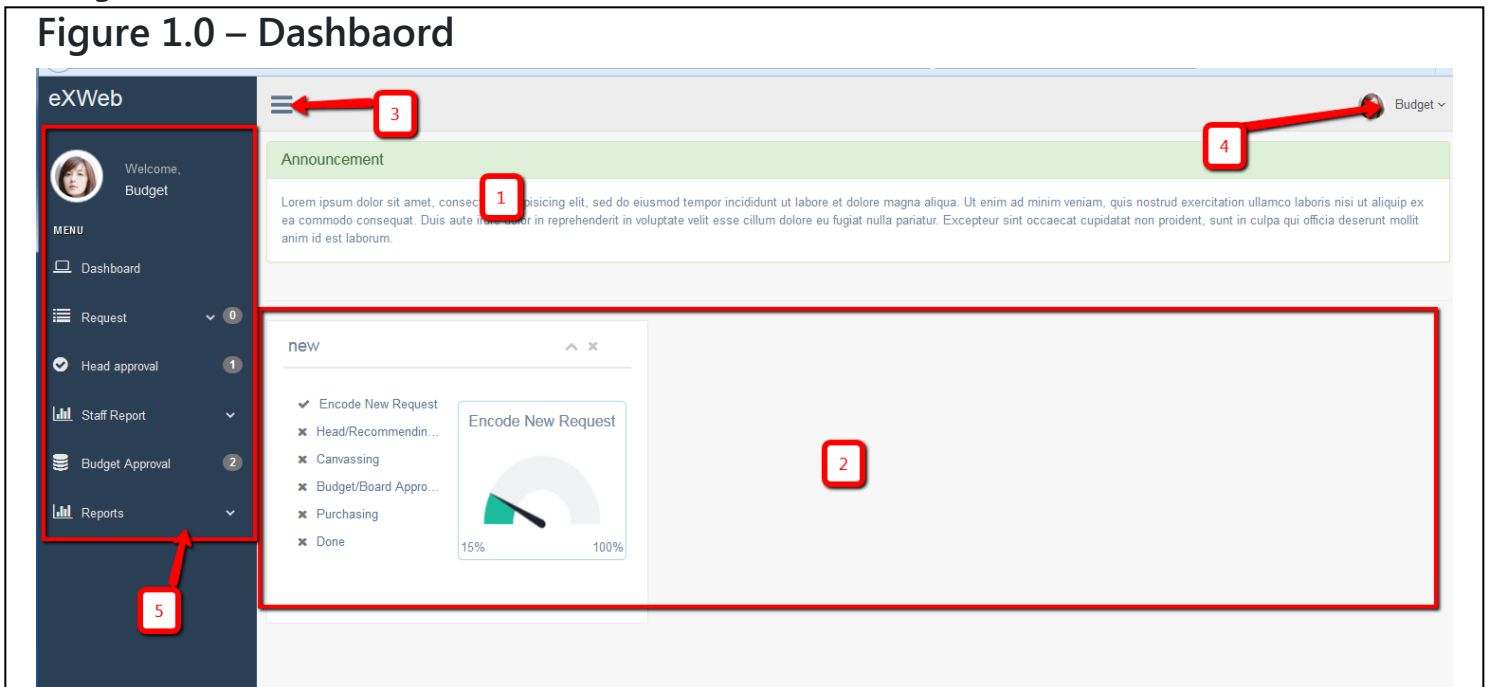
Purpose of the Purchasing Guide

This section should be used as a guide by all employees, when requisitioning, purchasing, receiving or approving, payment for goods and services. Statements of purchasing policies and objectives, responsibilities of various individuals and

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Budget Dashboard

Figure 1.0 – Dashbaord

1. Announcement area.
2. It shows all your current request showing its level of progress.
3. Hide/Show side bar menu
4. Top navigation
    1. Profile
    2. Settings
    3. Help

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> *Note: The number at the right side of the menu means a certain number of tasks needs to be taken into action. Another way of determining the action to be taken is through the light green row on each records table. See sample in figure 2.0*

Figure 2.0 – (sample) Light Green row

Request

- **All Request** – You can see here all the request of the users.
- **Staff Requests** – This page where you can see all requests of your staff.
- **My Requests** – This page where you can see your own request only. You can view the items by clicking the "View Items" button. You can print your request and go to the details of your request just by clicking the link in the request name. You can also edit your request by clicking the "Edit" button.
- **Request New** – This menu is the step where you can submit new request.

Head Approval

This menu or page will appear only if you have been assigned by the admin as a head of the department. As the head approval user you can view all newly submitted requests by your staff or even other department's staffs if it was assigned to you as a recommending approval.

The buttons under "Action" button will be different depending on the current status of the request.

Click the "View Items" button to view the items that are assigned to you. You can also see the items that are assigned to the other head (see <u>Assigned To</u> column). You can only approve and deny items that were assigned to you. Whether approved or denied, it will notify the requisitioner of your action

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will be forwarded to the admin for the next steps process.

Staff Reports

All reports generated here is only for your staffs. This menu will appear only if you are the head of the department.

- **Request Reports** – It will show all the Request Reports. There are different filters to choose according to purpose and preference, that is Branch, Department, Year and Month. You can view them as PDF, Excel and/or print them directly as is.

- **Item Reports** – It will show you all the items requested. There are different filters to choose according to your purpose and preference, that is Branch, Department, Year and Month. You can view them as PDF, Excel and/or print them directly as is.

- **PO Reports** – It will show you all the Purchase Order records. There are different filters to choose according to your purpose and preference, that is Branch, Department, Year and Month. You can view them as PDF, Excel and/or print them directly as is.

Budget Approval

You can see on this page all the request assigned to you for the approval of budget. Your action can be either approve or deny the request.

Reports

Budget also has an ability to view all the reports.

- **Request Reports** – It will show all the Request Reports. There are different filters to choose according to your purpose and preference, that is Branch, Department, Year and Month. You can view them as PDF, Excel and/or print them directly as is.

- **Item Reports** – It will show you all the items requested. There are different filters to choose according to your purpose and preference, that is Branch, Department, Year and Month. You can view them as PDF, Excel and/or print them directly as is.

- **PO Reports** – It will show you all the Purchase Order records. There are different filters to choose according to your purpose and preference, that is Branch, Department, Year and Month. You can view them as PDF, Excel and/or print them directly as is.

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Contact

Thank you for purchasing my item. If you have any questions that are beyond the scope of this help file, please feel free to email via my user page contact form here. Thank you so much!

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