

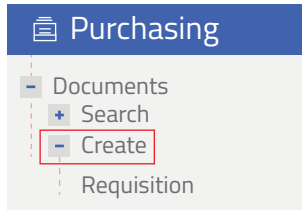


Brief user guide
Purchasing Process



Create a Requisition

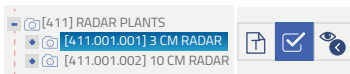
1. Go to the Purchasing panel > **Documents** > **Create** > **Requisition**



2. **Connect** equipment



3. Highlight an equipment and click **Select**



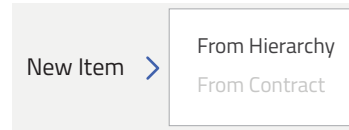
4. Designate a **Department**



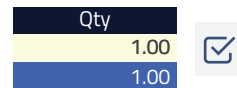
5. Add a **Date Needed** and set a **Priority** level



6. **Add** items by right clicking in the Requisition Items Tab



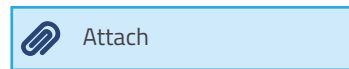
7. Type in the **quantity** you want and click the **Select** Button



8. Add **Remarks**



9. **Attach** files on the File Attachments Tab

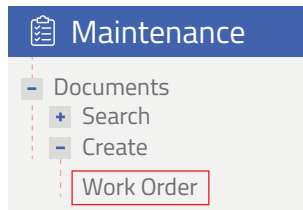


10. **Authorize** the Requisition, then Save

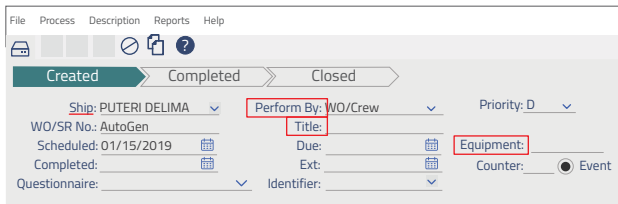


Requisition from a Work Order

1. **Create** a Work Order or **Open** an existing Work Order



2. Connect **Equipment** and fill out the **Main Header**



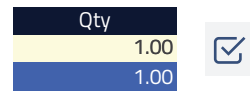
Enter a **Description** of the work to be performed

3. Go to the **Materials Tab** and **Required/Used**

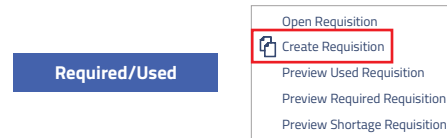


Right click and Choose **New Item**

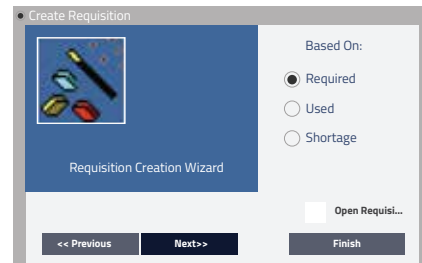
4. Type in the quantity you want and click the **Select** Button



5. On the **Requisition Tab** right click and **Create Requisition**

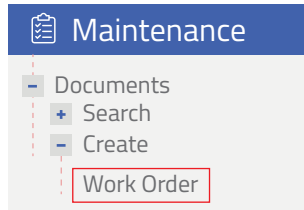


6. Use the **Requisition Wizard** to Create from **Required** Items

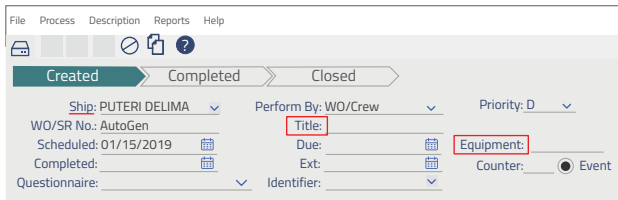


The Service Requisition

1. **Create** a Work Order

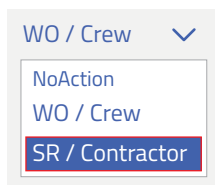


2. Connect Equipment and fill out the Main Header



Enter a description of the work to be performed

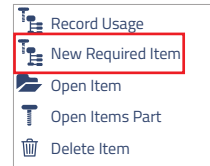
3. Change it to a Service Requisition



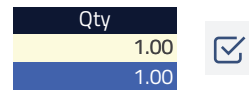
4. On the Admin Info tab, change the account code from materials to service



5. On the Materials Tab, connect **Materials Required** if any



6. Type in the quantity you want and click Select



Fill out information in the other tabs as necessary

7. **Authorize** the Service Requisition, then **Save**



Take Delivery of a Purchase Order

1. **Open** the Purchase Order



2. Go to the **Delivery** Tab



3. You can take **Full or Partial** Delivery



4. Click **Full Delivery** and enter dates and data as required

5. Click **Partial Delivery** and enter quantities actually delivered

PO Qty	All Dlvs.	This Dlvs.
1.0	0.0	1.0
2.0	0.0	1.0
2.0	0.0	1.0

6. Made a mistake? Click **Partial Delivery** and subtract quantities

PO Qty	All Dlvs.	This Dlvs.
2.0	1.0	0.0
2.0	1.0	-1.00
1.0	0.0	0.00

7. Enter Dates and Data for a Partial

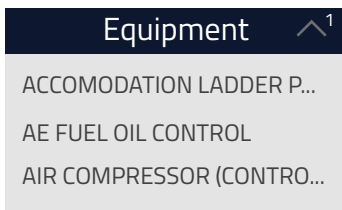
8. Item damaged? Incomplete? Submit an **Item Exception Report**

Where's My Stuff?

1. Go to **Saved Searches > Requisition Search > Outstanding Requisitions**



2. You can sort by any column
Find and open the Requisition



3. Go to the **Documents** Tab to find connected documents

Requisition Items		Admin Info	Documents
Document Type	Document No.		
RFQ	7122253		
PURCHASE ORDER	8126867		

4. Open the connected **Purchase Order** and check the status

Action	Rev	Acted On	
CREATED	0	11/28/2017	MUHAMAD, NIZAM
APPROVED	0	11/30/2017	RANGAN, SAM PRAKASH
ISSUED	0	11/30/2017	MUHAMAD, NIZAM

5. What about a **Service Order**? Go to the **Maintenance Pan** and open the SO



6. Go to the **Order Status** Tab in Materials PO for information

Admin Info	Inventory Data	Description	Order Status	Message
REQUISITION		ETACST0001177	04/26/2018	REVIEWED
PURCHASE ORDER		3300526 (0)	05/06/2018	APPROVED