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## Introduction

Ormed Requisitioning was developed as a tool for departments to electronically generate and manage requisition requests for supplies and equipment. The Ormed Requisitioning module allows for the creation of requisitions that combine both catalog and non-catalog items, with the ability to direct those requisitions to a comprehensive user-defined approval hierarchy, all tied into the centralized, consolidated ORMED MIS software system.

## What is a requisition?

A requisition is a request for items and capital, sent via ORMED MIS to an approver or a purchaser, depending on various factors such as the total cost of the requisition or the nature of the items requested.

### How do I assign requisitioners and approvers?

Requisitioners and approvers are assigned in the Ormed MM Manager module. For further information about setting up users, as well as for setting up the requisitioning system, consult the **Ormed Requisition Management Training Guide**, available from Ormed upon request.

## Where should I look?

- <u>Ormed Software Basics</u> familiarizes you with the common elements and shared traits of ORMED MIS software.
- <u>Procedures Requisitioner</u> contains procedures used by requisitioners.
- <u>Procedures Approver</u> contains the procedures used by approvers.
- <u>Procedures Ormed Messaging</u> has information on the optional Ormed Messaging module, how it interacts with the requisitioning process, and procedures specific to Ormed Messaging.
- <u>Additional Information</u> contains general information about the requisitioning process.

# **Ormed Software Basics**

Before delving into the rest of the user guide, take a brief moment to acquaint yourself with some of the common elements in most ORMED MIS applications.

## Common Icons

The following icons appear in most ORMED MIS modules:

- **New**  $\square$  or  $\square$  Creates a new record, file, or entry.
- Required Field ~ This icon denotes a required field that must be filled in. You will
  not be able to save any items or records missing required fields.
- Save 🖬 Save the file or entry you are currently working with.
- **Cancel** Ø or 2 Use this icon to cancel entry of a new item or record. If editing an existing item or record, this will revert the item or record to the state it was in before you began your edits.
- Delete <sup>™</sup> or × Deletes records, files, or entries in a module. Use this function with care, for in many cases deleted items cannot be recovered.
- Preview <u>A</u> View a form, file, list, or other item before you print.
- Print Print a form, file, list, or other item. In many cases, clicking this icon sends the information directly to the printer without previewing it first. Use the Preview icon if you want to view the information before printing.

## Change Your Password

Depending on your access privileges, you may be able to change your password from the **Security** menu, found in the main menu bar of nearly every ORMED MIS module.

**Note:** Changing your password is a permanent change that is effective immediately through all ORMED MIS software suites and modules for your username, <u>except</u> for Ormed Messaging. Ormed Messaging uses a separate password.

#### To change your password:

- 1. Click **Security** in the main menu bar, and then click **Change Password**. The **ORMED Security Change Password** window opens.
- 2. Fill in your **Old Password**, then type in your new password in both the **New Password** and **Confirm New Password** fields.
- 3. Click **OK**.

**Note:** If you do not have the appropriate permissions, you won't be able to change your password. Contact your system administrator for assistance.

#### Searching

Most ORMED MIS modules use common searching procedures.

#### **Quick Search**

You can quickly search for records by using the table in which they are listed.

#### To use quick search:

- 1. Click any cell under the column heading you wish to search by (e.g., PO #).
- 2. Type the first few characters of the record you want to find (e.g., type **12** to find purchase order number **12345**). The first record that matches your criteria is highlighted.

#### **Basic Search**

The basic search options allow you to search for items that match specific criteria.

#### To use basic search:

1. Click **Search** in the main toolbar (some ORMED MIS modules display basic search options by default). The basic search options appear:

Navigation Options << a		b
PO#	starts with	1 <b>-</b>
c	Find	Stop

#### Figure 1: Basic search options.

- a. Specify what you want to search for. Each individual ORMED MIS module will contain different choices here (e.g., ORMED MIS Purchasing will let you search by purchasing-related fields, such as PO #, PO Date, and Vendor).
- b. Specifies how the search will be conducted. Depending on the module, this box can include choices such as **contains** (find items that contain search criteria), **doesn't contain** (find items that do NOT contain search criteria), **is** (find items that match search criteria exactly), and more.
- c. Search criteria. Type your search criteria here.
- 2. Fill in the fields and click **Find**. If necessary, you can click **Stop** to cancel the search.

## Advanced Search

The advanced search options contain all the functionality of the basic search options in **Figure 1** above, but include the capability to specify multiple search criteria.

#### To conduct an advanced search:

1. From the <u>basic search options</u>, click **Advanced >>**. Additional options are revealed:

Navigation Options <<	а		b
P0 #	•	starts wit	h 🔻
c		Add	
Advanced <<	-		
d			
	Remove	Find	Stop

Figure 2: Advanced search options.

- a. Specify what you want to search for. Each individual ORMED MIS module will contain different choices here (e.g., ORMED MIS Purchasing will let you search by purchasing-related fields, such as PO #, PO Date, and Vendor).
- b. Specifies how the search will be conducted. Depending on the module, this box can include choices such as contains (find items that contain search criteria), doesn't contain (find items that do NOT contain search criteria), is (find items that match search criteria exactly), and more.
- c. Search criteria. Type your search criteria here
- d. This is where your search criteria, also called the search filter, will show up when added to your search.
- Enter what you want to search for, how to search, and your search criteria, then click the Add button. Repeat this step until you have as many search filters as you need. If you need to remove a search filter, click it, then click the Remove button.
- 3. After entering all of your search criteria, click **Find**. If necessary, you can click **Stop** to cancel the search.

## **Procedures – Requisitioner**

**Note:** A user marked as either a **Requisitioner** or an **Approver** in Ormed MM Manager can complete the following procedures.

#### Create a New Requisition

A requisition can include catalog, non-catalog, and capital items. Requisitions may be built one item at a time or built from a pre-defined list of catalog items currently in that department's supply area profiles (SAPs) or pre-created recurring requisitions.

#### To create a new requisition:

1. Click **Requisition** in the sidebar, or click **Process** in the top menu bar, then **Requisition**. The **Requisitioning** window opens.

慃 Requisitionir	ng - Period: 08 Dec, Starting Date:	12/1/2008 through: 12/31/2008.
<u>File Process V</u> i	iew <u>S</u> ecurity <u>H</u> elp	
🛛 🗋 🗶 🗑	) 🛱 🔮 🧈 🚖 💖	
General	Requisitioning	
Requisition	Navigation Options <	General Items Notes Budget Status: Created:
ത്തി	Find Stop	Requested By:
<u> </u>	Advanced >> Requisition No. Status Date De:	Phone No.:
Approval	Trequisition No. Status Date De.	Default Department:
		Description:
		Deliver To:
		Description:
	۲	Total Total Request:
		SUPERVIS SCMS_DEMO_SSS

Figure 3: The **Requisitioning** window.

- 2. Click **New** in the main toolbar. Ensure you are at the **General** tab.
- 3. Fill in the information in the General tab:
  - a. **Default Department** Sets a default department code for all requisitions. You can opt to leave this blank and enter department information for each item line later in this procedure.
  - b. **Description** (below **Default Department**) Contains the department name for the selected default department code.

- c. Deliver To The name of the department code that items will be delivered to. You can opt to leave this blank and enter delivery information for each item line later in this procedure.
- d. **Description** (below **Deliver To**) Enter a brief description for the requisition (e.g., a project or service name). This field can be left blank if desired.
- e. **Priority** The requisition priority code.
- 4. Click the **Items** tab and add, edit, and remove items as necessary:
  - a. Add Click to add a single item. After clicking, fill out the Adding Item window and click OK to add the item to the requisition.
  - b. Edit Item Click to edit an item line. After clicking, modify the fields in the Editing Item window as necessary and click OK when finished.
  - c. **Remove** Click to delete an item line from the requisition. In the confirmation window that follows, click **Yes** to remove the item line, or **No** to keep it.
  - d. Add SAP/RecReq Click to add all items from an SAP (supply area profile) or a recurring requisition. After clicking, select the SAP or recurring requisition to add from the Add SAP/Recurring Requisition window and click OK.

🌼 Requisi	tioning - Period: 08 Dec, Starting Date	:12/1/2008 throu	ıgh: 12/31/2008			_ 🗆 ×
<u>File</u> Proce	ss <u>V</u> iew <u>S</u> ecurity <u>H</u> elp					
] 🗋 🖪 🤉	🎯 🏟 🗶 🤜 🗁 🖤					
Genera	💭 Type: Regular					
- A	Navigation Options <<	General Items	Notes Budget	]		
Requisitio	Requisitior 💌 starts with 💌	Item # Catal	log # Descripti	on Qty Ord	Qty Issued U of I	Amount
677	Find Stop	41004000 11-33	339999 GAUZE 4	X 4 STERILE 1	0 PK/100	110.0000
<b>?</b>	Advanced >>					
Approva	Requisition No. Status Date De					
		Add Ec	dithtem <u>R</u> emov	/e Add SAP <u>y</u> RecReq	Total:	110.0000
	,				SUPERVIS SO	MS_DEMO_SSS

Figure 4: The **Items** tab, with an item added.

5. Click the **Notes** tab and enter any relevant requisition notes.

😂 Requisitionir	ng - Period: 08 Dec, Starting Date:	12/1/2008 through: 12/31/2008.	
<u>File Process V</u> i	iew <u>S</u> ecurity <u>H</u> elp		
] 🗅 🖬 🧭 🗯	🔊   🛥 🛖   🧈 👘		
General	🗿 Type: Regular		
<u>a</u>	Navigation Options <<	General Items 🛇 Notes Budget	
Requisition	Requisitior 💌 starts with 💌	Sterile gauze for OR.	
ବ୍ୟ	Find Stop	Additional sample item notes.	
<b>1</b>	Advanced >> Requisition No. Status Date De:		
Approval			
			-
		,	
			SUPERVIS SCMS_DEMO_SSS

Figure 5: The Notes tab, populated with requisition notes.

6. Click the **Budget** tab and review budget information. The **Budget** tab displays current departmental budget information by account to aid in staying within your budget while creating your requisition.

Requisition       Find       Stop         Advanced >>       Requisition No. Status Date Dev	Requisition	ouble-click a line in th         ing - Period: 08 Dec, Starting Date:         View Security Help         Image: Period: Dec, Starting Date:         Image: Period: 08 Dec, Starting <th>12/1/2008 through: 1</th> <th>2/31/2008.</th> <th></th> <th>ecific budget details.</th>	12/1/2008 through: 1	2/31/2008.		ecific budget details.
	8	Requisition     starts with       Find     Stop       Advanced >>	Account 00001.71260.46060	YTD Budget 5,625.00	YTD Actual 0.00	7,500.00

Figure 6: The Budget tab.

7. Click the **Save** kicon to store the requisition to be modified and sent later, or click the **Send** *icon* to send the requisition immediately.

**Note:** If, after creating a new requisition, the requisition dollar total is over your approved limit or if an item line in the requisition is over the line limit, the requisition will be sent for approval. If the requisition dollar total is under or equal to your approved limit AND each item line in the requisition is under or equal to the line limit, the requisition will go directly to the buyer or inventory controller to be processed.

### Modify an Open Requisition

An open requisition (one that has not yet been sent) can be modified by a requisitioner.

Note: Once a requisition has been sent, it cannot be modified by a requisitioner.

#### To modify an open requisition:

- 1. Click **Requisition** in the sidebar, or click **Process** in the top menu bar, then **Requisition**. The **Requisitioning** window opens.
- 2. Search for and select the open requisition you want to modify. Ensure that you are on the **General** tab.

🈂 Requisitionii	ng - Period: 08 Dec, Starting Date:	12/1/2008 through: 12/31/2008.	
Eile Process V	jew <u>S</u> ecurity <u>H</u> elp		
🛛 🗋 🔛 🚿 🗑	🗊 🛥 🔔 🧈 🕁		
General	🗿 Type: Regular; Requisiton No.	: 4;	
(1) Requisition	Navigation Options << Requisition visual starts with visual stop Advanced >> Requisition No. Status Date De: 4 Open 5/2	General       Items       Notes       Budget         Status:       Regular Open         Requested By:       SUPERVISOR         Phone No.:	Created: 5/25/2010 Priority: REGULAR Required: 5/27/2010 Request: 110.0000
	<		
			SUPERVIS SCMS_DEMO_SSS

Figure 7: The Requisitioning window, with an open requisition selected.

- 3. Modify the information in the General tab as necessary.
  - a. **Default Department** Sets a default department code for all requisitions. You can opt to leave this blank and enter department information for each item line later in this procedure.
  - b. **Description** (below **Default Department**) Contains the department name for the selected default department code.

- c. **Deliver To** The name of the department code that items will be delivered to. You can opt to leave this blank and enter delivery information for each item line later in this procedure.
- d. **Description** (below **Deliver To**) Enter a brief description for the requisition (e.g., a project or service name). This field can be left blank if desired.
- e. **Priority** The requisition priority code.
- 4. Click the **Items** tab and add, edit, and remove items as necessary.
  - a. Add Click to add a single item. After clicking, fill out the Adding Item window and click OK to add the item to the requisition.
  - b. Edit Item Click to edit an item line. After clicking, modify the fields in the Editing Item window as necessary and click OK when finished.
  - c. **Remove** Click to delete an item line from the requisition. In the confirmation window that follows, click **Yes** to remove the item line, or **No** to keep it.
  - d. Add SAP/RecReq Click to add all items from an SAP (supply area profile) or a recurring requisition. After clicking, select the SAP or recurring requisition to add from the Add SAP/Recurring Requisition window and click OK.
- 5. Click the **Notes** tab and modify requisition notes as necessary.
- 6. Click the **Budget** tab and review budget information. The **Budget** tab displays current departmental budget information by account to aid in staying within your budget while creating your requisition.
- 7. Click the **Save** icon to store the requisition to be modified and sent later, or click the **Send** icon to send the requisition immediately.

## Delete an Open Requisition

An open requisition (one that has not yet been sent) can be cancelled by a requisitioner.

**Note:** Once a requisition has been sent, it cannot be deleted by a requisitioner.

#### To delete an open requisition:

- 1. Click **Requisition** in the sidebar, or click **Process** in the top menu bar, then **Requisition**. The **Requisitioning** window opens.
- 2. Search for and select the open requisition you want to delete.

Eile Process Vi	jew Security Help	12/1/2008 through: 12/31/2008.	
General		General tems       Items       Notes       Budget         Status:       Regular Open         Requested By:       SUPERVISOR         Phone No.:       Default Department:       00001.71260         Description:       OPERATING ROOM         Deliver To:       OPERATING ROOM         Description:       Items	Created: 5/25/2010 Priority: REGULAR Required: 5/27/2010 Total Total Request: 110.0000
			SUPERVIS SCMS_DEMO_SSS

Figure 8: The **Requisitioning** window, with an open requisition selected.

3. Click **Delete** in the main toolbar. You will be prompted for confirmation.

🗐 Requisitionii	ng - Period: 08 Dec, Starting Date:	12/1/2008 through: 12/31/2008.	
<u>File</u> Process <u>V</u>	iew <u>S</u> ecurity <u>H</u> elp		
1 🖬 🔊 🕅	🔭 😅 🥥 🥥 🕼		
General	Dype: Regular; Requisiton No.	: 4;	
(2)	Navigation Options <<	General Items 🚫 Notes Budget	
(1) Requisition		Status: Regular Open	Created: 5/25/2010 🗾
ଡ଼ିଆ		Requested By: SUPERVISOR	Priority: REGULAR 💌
Approval	Requisition No. Status Date De:	Phone No.:	Required: 5/27/2010 💌
	4 Open 5/2	Default Department: 00001.71260	
	Cancel		
	Are y	ou sure that you wish to cancel this requisition?	
			Created: 5/25/2010  Priority: REGULAR  Required: 5/27/2010
			t Created: 5/25/2010 Priority: REGULAR Required: 5/27/2010 tition?
(1) Requisition       Find       Stop         Approval       Find       Stop         Advanced >>       Requisition No. Status       Date         4 Open       5/22       Default Department:       00001.71260         Cancel Requisition       Are you sure that you wish to cancel this requisition?       Xes         Yes       No       Total			
			SUPERVIS SCMS_DEMO_SSS

Figure 9: Confirmation box for deleting an open requisition.

**Note:** Deleting a requisition is an action that CANNOT be undone. Be certain you want to delete the requisition before proceeding!

4. Click **Yes** to delete the requisition, or **No** to keep it.

# **Procedures – Approver**

Approvers, in addition to being able to perform all of the tasks a requisitioner can do, have access to additional functionality.

**Note:** The following procedures are available only to a user marked as an **Approver** in Ormed MM Manager.

### Approve/Reject Requisitions

#### To approve/reject requisitions:

1. Click **Approval** in the sidebar, or click **Process** in the top menu bar, then **Approval**. The **Requisition Processing** window opens.

eral	_			_				_	_	
erai		tion Proces	sing							
	Adjustmer									
	Process	Priority	Department	Req No	ltem No	Catalog No	Description	Quantity		Unit Cost
sition		REGULAR	00006.7141510	23			3 BANK ILLUMINA		EA	\$0.0000
a l		REGULAR	00006.7141510	16	98667100		PICTURE FRAME 1		EA	\$0.0000
		REGULAR	00006.7141510	30	75060000	14X36	X-RAY CRONEX 4		BX/50	\$14.8430
proval		REGULAR	00006.7141510	32	75060000	14X36	X-RAY CRONEX 4		BX/50	\$14.8430
		REGULAR	00006.7141510	31	75060000	14X36	X-RAY CRONEX 4		BX/50	\$14.8430
		REGULAR	00006.7141510	42	75060000	14X36	X-RAY CRONEX 4		BX/50	\$14.8430
		REGULAR	00006.7141510	23	75060000	14X36	X-RAY CRONEX 4	5	BX/50	\$14.8430
		REGULAR	00006.7141510	42	75010000	8X10	X-RAY FILM UVG		BX/50	\$42.6700
		REGULAR	00006.7141510	32	75000000	7X17	X-RAY FILM UVG	3	BX/100	\$123.9400
		REGULAR	00006.7141510	42	75020000	9X9	X-RAY FILM UVG	5	BX/100	\$94.9700
		REGULAR	00006.7141510	42	75050000	14X17	X-RAY FILM UVG	5	BX/50	\$121.1200
		REGULAR	00006.7141510	42	75000000	7X17	X-RAY FILM UVG	5	BX/100	\$123.9400
		REGULAR	00006.7141510	42	75030000	10X12	X-RAY FILM UVG	5	BX/100	\$124.8200
		REGULAR	00006.7141510	42	75040000	11X14	X-RAY FILM UVG	5	BX/100	\$158.6100
	Edit Ite	em	Approve	<u>R</u> eject		Viev		n Notes	Requ	
	Show Red	quisition					< <u>B</u> ack	Ne	xt >	<u>C</u> ancel

Figure 10: The **Requisition Processing** window for approving requisitions.

- 2. Examine the requisition lines:
  - a. **Process** Contains checkboxes that allows you to select what items to process. You will check these boxes in the next step.
  - b. **Priority** The priority set for this item by the requisitioner.

- c. **Department** Where the charges for the item will be assigned.
- d. **Req No** The requisition ID that the item is from.
- e. **Item No** The item's catalog number as defined in your item catalog. The field will be blank for non-catalog items.
- f. Catalog No The item's catalog number as defined by the vendor.
- g. **Description** The item's description.
- h. Quantity Amount of the item requested by the requisitioner.
- i. **U of I** The units of issue for the item.
- j. Unit Cost The per unit cost of the requested item.
- k. Total The total cost of the item line (Unit Cost multiplied by Quantity).
- I. Date Req The required date as set by the requisition's priority status.
- m. Requested By The user that created the requisition.
- 3. For each line you want to process, select it and click the **Approve** button.
- 4. For each line you want to reject, select it and click the **Reject** button.

neral	2 Requisi	tion Proces	sina							
3	Adjustmer		ising							
2	Process	Priority	Department	Reg No	Item No	Catalog No	Description	Quantity	Uofl	Unit Cost
isition		REGULAR	00006.7141510	23			3 BANK ILLUMINA	1	EA	\$0.0000
-	$\checkmark$	REGULAR	00006.7141510	16	98667100		PICTURE FRAME 1	1	EA	\$0.0000
2		REGULAR	00006.7141510	30	75060000	14X36	X-RAY CRONEX 4	1	BX/50	\$14.8430
pproval		REGULAR	00006.7141510	32	75060000	14X36	X-RAY CRONEX 4	4	BX/50	\$14.8430
pprovar	×	REGULAR	00006.7141510	31	75060000	14X36	X-RAY CRONEX 4	5	BX/50	\$14.8430
	× •	REGULAR	00006.7141510	42	75060000	14X36	X-RAY CRONEX 4	5	BX/50	\$14.8430
		REGULAR	00006.7141510	23	75060000	14X36	X-RAY CRONEX 4	5	BX/50	\$14.8430
		REGULAR	00006.7141510	42	75010000	8X10	X-RAY FILM UVG	5	BX/50	\$42.6700
		REGULAR	00006.7141510	32	75000000	7X17	X-RAY FILM UVG	3	BX/100	\$123.9400
		REGULAR	00006.7141510	42	75020000	9X9	X-RAY FILM UVG	5	BX/100	\$94.9700
		REGULAR	00006.7141510	42	75050000	14X17	X-RAY FILM UVG	5	BX/50	\$121.1200
		REGULAR	00006.7141510	42	75000000	7X17	X-RAY FILM UVG	5	BX/100	\$123.9400
		REGULAR	00006.7141510	42	75030000	10X12	X-RAY FILM UVG	5	BX/100	\$124.8200
		REGULAR	00006.7141510	42	75040000	11X14	X-RAY FILM UVG	5	BX/100	\$158.6100
	•									
	<u>E</u> dit It	em ,	Approve	<u>R</u> eject		Vie	w <u>B</u> udget [te	n Notes	Requ	uisition Notes
							< <u>B</u> ack	Ne	xt >	Cancel

Figure 11: Two line items selected for approval and two line items selected for rejection.

5. Click **Next** and review requisition details. At this point, if required, click **Back** to make changes to line items.

6. Click **Finish** to process the stock item requisition lines.

### **Edit Requisition Line Items**

Before approving a requisition, you can edit the line items in a requisition.

#### To edit requisition line items:

- 1. Click **Approval** in the sidebar, or click **Process** in the top menu bar, then **Approval**. The **Requisition Line Approval** window opens.
- 2. Examine the requisition lines:
  - a. **Process** Contains checkboxes that allows you to select what items to process. You will check these boxes in the next step.
  - b. **Priority** The priority set for this item by the requisitioner.
  - c. **Department** Where the charges for the item will be assigned.
  - d. Req No The requisition ID that the item is from.
  - e. **Item No** The item's catalog number as defined in your item catalog. The field will be blank for non-catalog items.
  - f. **Catalog No** The item's catalog number as defined by the vendor. If empty, either the requisitioner did not enter a vendor catalog number or your item catalog does not include the vendor's catalog number.
  - g. **Description** The item's description.
  - h. Quantity Amount of the item requested by the requisitioner.
  - i. **U of I** The units of issue for the item.
  - j. Unit Cost The per unit cost of the requested item.
  - k. Total The total cost of the item line (Unit Cost multiplied by Quantity).
  - I. Date Req The required date as set by the requisition's priority status.
  - m. Requested By The user that created the requisition.
- 3. For each item line to be edited:

**Note:** Only <u>one</u> item can be edited at a time.

a. Check the item's **Process** checkbox, then click **Edit Item**.

il 🔤	Requisition Processing										
	Adjustments										
	Process	Priority	Department	Reg No	ltem No	Catalog No	Description	Quantity			
n		REGULAR	00006.7141510	23			3 BANK ILLUMINATOR	1			
		REGULAR	00006.7141510	32	75000000	7X17	X-RAY FILM UVG DAYLIGHT (7X17)	3			
		REGULAR	00006.7141510	42	75000000	7X17	X-RAY FILM UVG DAYLIGHT (7X17)	5			
val		REGULAR	00006.7141510	42	75010000	8X10	X-RAY FILM UVG DAYLIGHT (8X10)	5			
		REGULAR	00006.7141510	42	75020000	9X9	X-RAY FILM UVG DAYLIGHT (9X9)	5			
		REGULAR	00006.7141510	42	75030000	10X12	X-RAY FILM UVG DAYLIGHT (10X12)	5			
		REGULAR	00006.7141510	42	75040000	11X14	X-RAY FILM UVG DAYLIGHT (11X14)	5			
		REGULAR	00006.7141510	42	75050000	14X17	X-RAY FILM UVG DAYLIGHT (14X17)	5			
	✓	REGULAR	00006.7141510	42	75060000	14X36	X-RAY CRONEX 4 TRIFOLD (14X36)	5			
		REGULAR	00006.7141510	32	75060000	14X36	X-RAY CRONEX 4 TRIFOLD (14X36)	4			
		REGULAR	00006.7141510	31	75060000	14X36	X-RAY CRONEX 4 TRIFOLD (14X36)	5			
		REGULAR	00006.7141510	30	75060000	14X36	X-RAY CRONEX 4 TRIFOLD (14X36)	1			
		REGULAR	00006.7141510	23	75060000	14X36	X-RAY CRONEX 4 TRIFOLD (14X36)	6			
		REGULAR	00006.7141510	16	98667100		PICTURE FRAME 11X14 BLACK	1			
	Edit It	em l	Approve	<u>R</u> eject		View	v <u>B</u> udget Item Notes <u>R</u> equis				
	Show Re	quisition					< <u>B</u> ack <b>Next &gt;</b>	<u>C</u> ancel			



😽 Editing Item 75060000 🛛 🗙
Item       Stock Item         Priority:       REGULAR       Catalog item         Required:       4/23/2010       Catalog item         Department:       00006.7141510       Capital item         Deliver To:       XRAY Room 3       Catalog item         Item No.:       75060000       Catalog item         Description:       X-RAY CRONEX 4 TRIFOLD (14X36)       Catalog item
Catalog No.:  14X36 Details Notes Status   Quantity:
Commodity:     FILM     Image: Category:     47510     Image: Category:     47510     Image: Category:     47510     Image: Category:     47510     Image: Category:     Image: Category:     147510     Image: Category:     Image: Category:     147510     Image: Category:     Image: Cate
Add New Edit Next Copy tem QK Cancel

Figure 13: The Editing Item window.

- b. Modify the fields in the Editing Item window as necessary.
- c. Click **OK** when finished.

## Assign Temporary Approvers

This feature allows for the temporary reassignment of approvers.

#### To assign temporary approvers:

1. Click **File** in the top menu bar, then **Temporary Approver**. The **Temporary Approver** Assignment window opens.

🖥 Temporary Approver Assignment	
Approver ID:	
Temporary Approver:	
Capital Approver:	
Non-Capital Approver:	
Start Date: 🗾 End Date: 🗾	

Figure 14: The **Temporary Approver Assignment** window.

- 2. In the **Approver ID** field, click the **button**, search for and select the approver you want to assign alternates for, then click **Use**. You return to the **Temporary Approver Assignment** window.
- 3. In the **Capital Approver** field, click the **v** button, search for and select the temporary capital approver you want to assign, then click **Use**. You return to the **Temporary Approver Assignment** window.
- 4. In the **Non-Capital Approver** field, click the <sup>⊥</sup> button, search for and select the temporary non-capital approver you want to assign, then click **Use**. You return to the **Temporary Approver Assignment** window.
- 5. Select a **Start Date** and **End Date** for the temporary approvers.
- 6. Click the **Save** licon in the toolbar, or click **File**, then **Save**.

**Note:** Even if an alternate approver is assigned, the original approver will still be able to view pending requisitions.

## Assign Requisitions to Different Approvers

This feature allows for the reassignment of requisitions to another approver.

#### To assign requisitions to different approvers:

1. Click **File** in the top menu bar, then **Change Approver**. The **Change Approver** window opens.

📽 Change	Approver			×
1	Change Approver: Select the approver that will ha the approver that the requisitio requisitions to the new approv	ins will k		
-Alternate A	pprover Selection			
	Current Approver		Change to A <sub>f</sub>	oprover
User ID:	I		User ID:	<u>-</u>
Requisition	No. Description Date Require	•	Requisition No. Descri	ption Date Require
		Ass	ign To New Approver	Cancel

Figure 15: The Change Approver window.

- 2. In the **Current Approver** section to the left, click the **button**, search for and select the approver whose requisitions you want to assign elsewhere, then click **Use**.
- 3. In the **Change to Approver** section to the left, click the <u></u>button, search for and select the approver to assign the requisitions to, then click **Use**.
- 4. Using the D and D buttons, assign requisitions to and from the selected approvers.

**Note:** Hold down the **Ctrl** key as you click on requisitions to select more than one. Or click a requisition, hold down the **Shift** key, and click another requisition to select both requisitions and everything in-between.

5. Click Assign To New Approver to complete the assignment.

# **Procedures – Ormed Messaging**

Ormed Messaging is an optional component of the Ormed Systems Management suite, designed to improve the communication capabilities of ORMED MIS software by relaying important alerts to the users who need to see them. A small system tray application with little overhead that, after installed, runs whenever you log into Windows, Ormed Messaging monitors your Ormed software database for alerts specific to you, and notifies you when these alerts arrive.

Ormed Messaging is used in tandem with Ormed Requisitioning to view new requisition requests made and to inform users making requisition requests if those requests were denied. As it is currently an optional utility, Ormed Messaging must be installed separately from other Ormed software components.

#### **Overview**

#### **Requisitions for Approval**

When a requisition is created, the requisition's **Priority** setting determines the priority level of the alert received in Ormed Messaging.

Status:	OPEN		Created:	1/19/2007	Ψ.
Requested By:	SUPERVISOR	<	Priority:	STAT	•
Phone No.:			Required:	1/19/2007	•
Default Department:		I			
Description:					
Deliver To:					
Description:					
		- Total - Total F	Request:		0.0000

Figure 16: A **STAT** requisition in Ormed Requisitioning

**Normal** requisitions generate **Normal** priority alerts, while **STAT** requisitions generate **High** priority alerts. Users running Ormed Messaging who can approve the requisition will receive an alert like the following:

S ORMED Messaging Alerts							
	Date/Time Created	Priority	Suite	Component	Viewed	Alert Description	
Þ	1/23/2007 4:34 PM	High 🔥	SCMS	Requisitioning	False	STAT Requisition #183 is waiting for you	

Figure 17: The alert that an approver will see when a STAT requisition is awaiting processing.

### **Denied Requisitions**

After seeing the alert in Ormed Messaging, an approver launches Ormed Requisitioning to approve or deny the request (see <u>Procedures – Approver</u> earlier in this document).

If denied, the requisitioner who initially created the requisition is sent an alert stating that it was denied. The alert's priority will be the same as the original requisition request.

CRMED Messaging Alerts							
	Date/Time Created	Priority	Suite	Component	Viewed	Alert Description	
Þ	1/19/2007 2:59 PM	High 🔥 🔥	SCMS	Requisitioning	False	STAT Requisition #183 has been rejected	

Figure 18: The alert that a requisitioner will see when a requisition has been rejected.

## Alert Notification and Priority

The Ormed Messaging System Tray icon  $\gg$  displays a warning bubble when new unread alerts are received. The bubble tells you how many unread alerts are waiting as well as their priority. Alerts marked as read do not trigger this warning bubble.

ORMED Messaging Alerts	×
You have 15 High Priority Alert(s) that require attention!	(s) your

Figure 19: The unread alerts warning bubble.

All alerts are assigned a **Priority** of either **Normal** for non-urgent alerts or **High** for urgent alerts that need immediate attention.

## Mark an Alert as Read or Unread

#### To mark an alert as read or unread:

- 1. Double-click the Ormed Messaging System Tray icon  $\gg$ .
- 2. Right-click on the alert you want to mark.
- 3. Click either Mark as Read or Mark as Unread.

**Note:** If you click an unread alert and wait for about a second, the alert will be automatically marked as read.

## **Delete an Alert**

#### To delete an alert:

- 1. Double-click the Ormed Messaging System Tray icon  $\gg$ .
- 2. Right-click on the alert you want to delete.

**Note:** Deleted alerts CANNOT be recovered and you will NOT be asked for confirmation. Be certain you want to delete the alert before proceeding!

3. Click Delete Alert.

#### Change Message Retrieval Frequency

Note: By default, Ormed Messaging checks for new alerts every five (5) minutes.

#### To change message retrieval frequency:

- 1. Right-click the Ormed Messaging System Tray icon  $\mathbb{Z}$ , then click **Preferences**.
- 2. Under **Message Retrieval Frequency**, click either **Minutes** (selected by default) or **Seconds**, then enter the number of minutes or seconds you want to use.
- 3. Click **OK**.

# **Additional Information**

### **Requisition Priority**

ORMED MIS supports up to nine requisition priority codes for classifying requisition urgency. Priority codes contain lead times (measured in days) which specify how soon a requisition with that code must be fulfilled.

Requisition priority codes are setup by administrators in Ormed MM Manager's **Global Setup** window, under the **Requisition Settings** tab.

Þ	🔎 Global Setup 📃 🗆 🗙										
Fa	cility F	PO Options	PO Notes Requis	sition Settings Miscellaneous							
Г	Priority	Table:									
	Code	Description	Lead Time(Days)	Default 🔺	]						
	1	STAT	0								
	2	REGULAR	2								
	3	CAP-PURC	90								
	4	COMBINED	2								
	5	SERVICE	3		'Ľ						
	6	INFO	15		1						
				<u>A</u> dd <u>E</u> dit <u>R</u> emove							

Figure 20: The Requisition Settings tab, showing the requisition priority table, in Ormed MM Manager's Global Setup.

## **Requisition Status**

The requisition's status tells you what point of the requisition process the requisition is in.

- 1. **OPEN** The requisition has been newly created but not yet sent for approval, issuing, or purchasing. It can be viewed and edited until it is sent.
- 2. **PENDING** The requisition has been sent for approval, issuing, or purchasing. It can be viewed but not edited.
- 3. **CLOSED** The requisition has been completed and closed. It can be viewed but not edited.
- 4. **CANCELLED** The requisition has been cancelled. It can be viewed but not edited.

## **Contact Us**

#### **Questions and Support**

If you have any questions or concerns about this document, please e-mail <u>scms\_support@ormed.com</u>. We will be pleased to assist you.

### What Are Your Thoughts?

If you have any suggestions for how we can improve this document, please send them to <u>feedback@ormed.com</u> with the subject line **Feedback - Ormed Requisitioning User Guide**. Your feedback assists us in better serving you.

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