USER GUIDE

Requisitioning

Supply Chain Management Suite

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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?

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

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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** or – 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** or – 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** or – Deletes records, files, or entries in a module. Use this function with care, for in many cases deleted items cannot be recovered.
- **Preview** – 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, except 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:

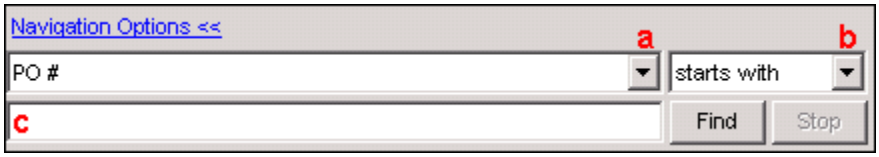

Figure 1: Basic search options.

   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 basic search options, click **Advanced >>**. Additional options are revealed:

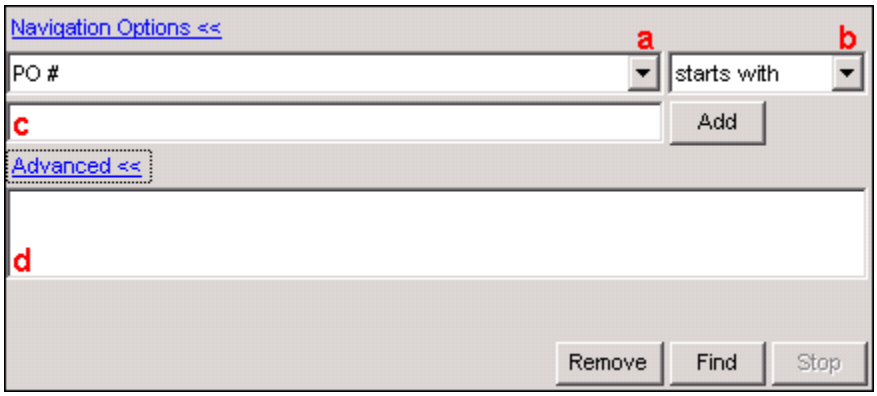

Figure 2: Advanced search options.

   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.

2. 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.

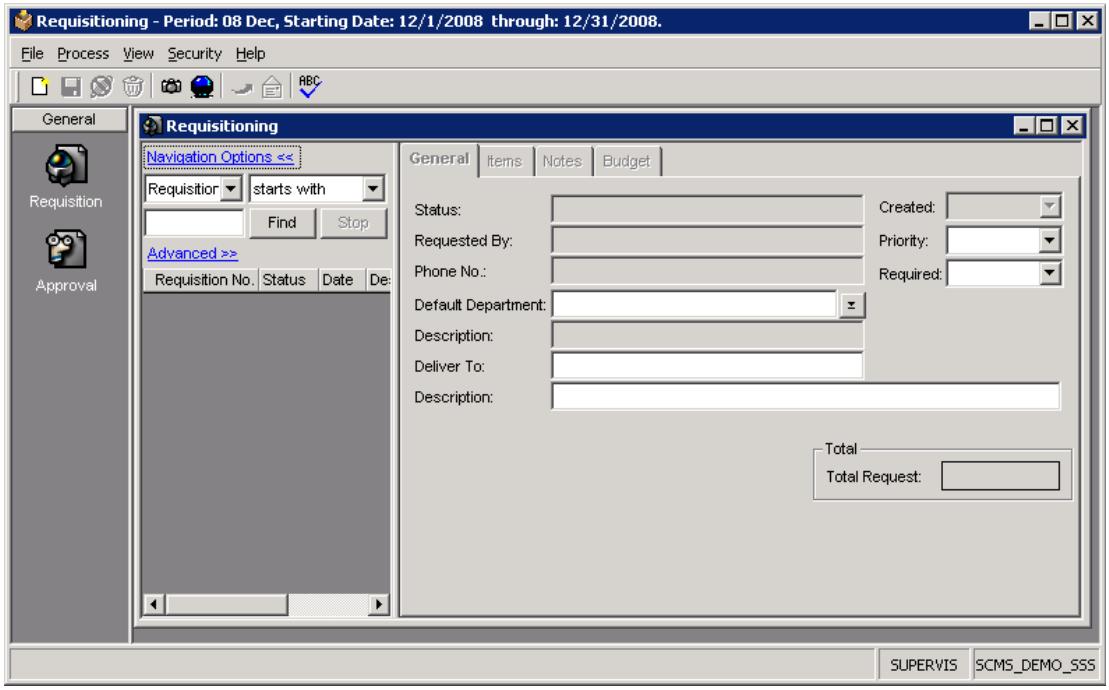

Figure 3: The **Requisitioning** window.

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**.

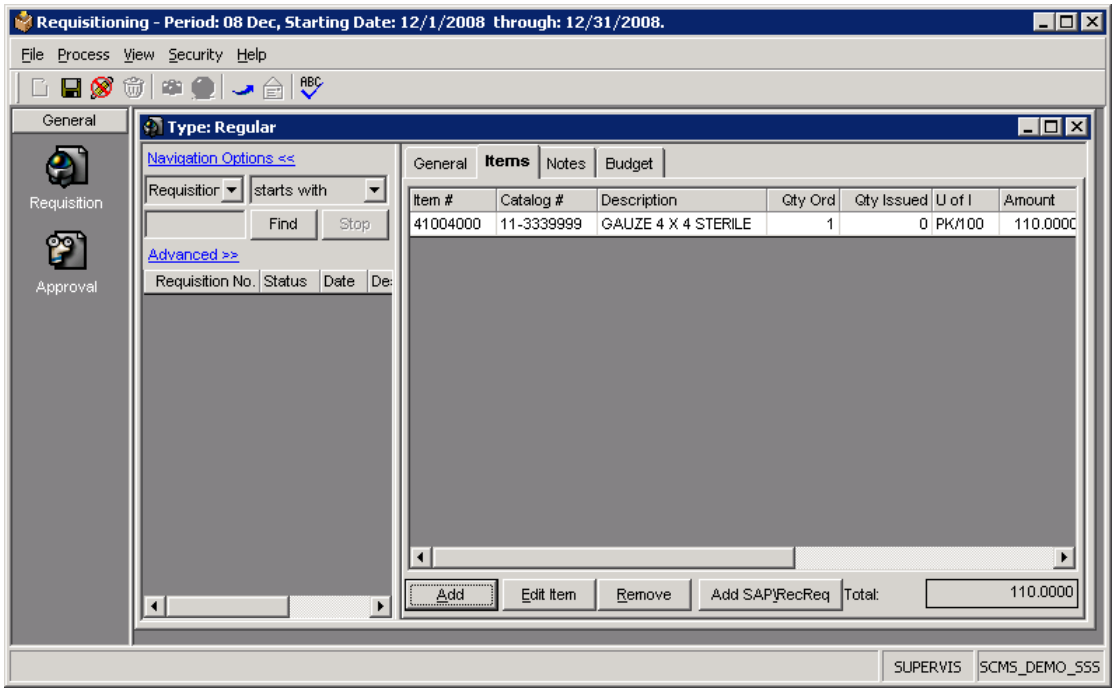

Figure 4: The **Items** tab, with an item added.

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

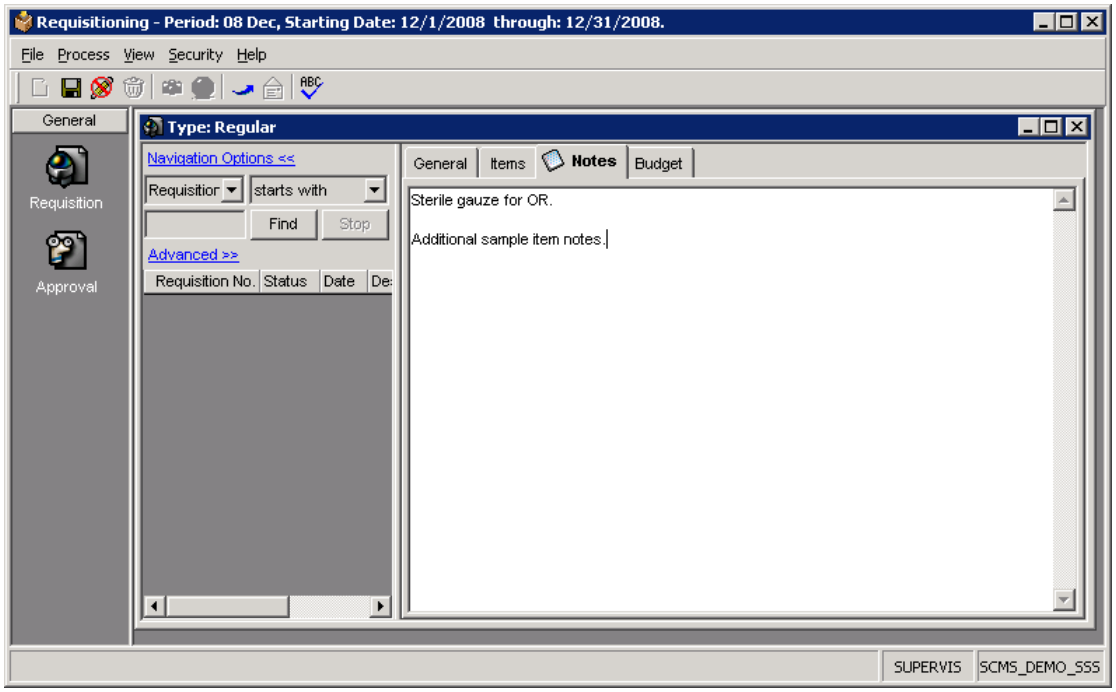

Figure 5: The **Notes** tab, populated with requisition notes.

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.

Note: Double-click a line in the **Budget** tab to drill-down into specific budget details.

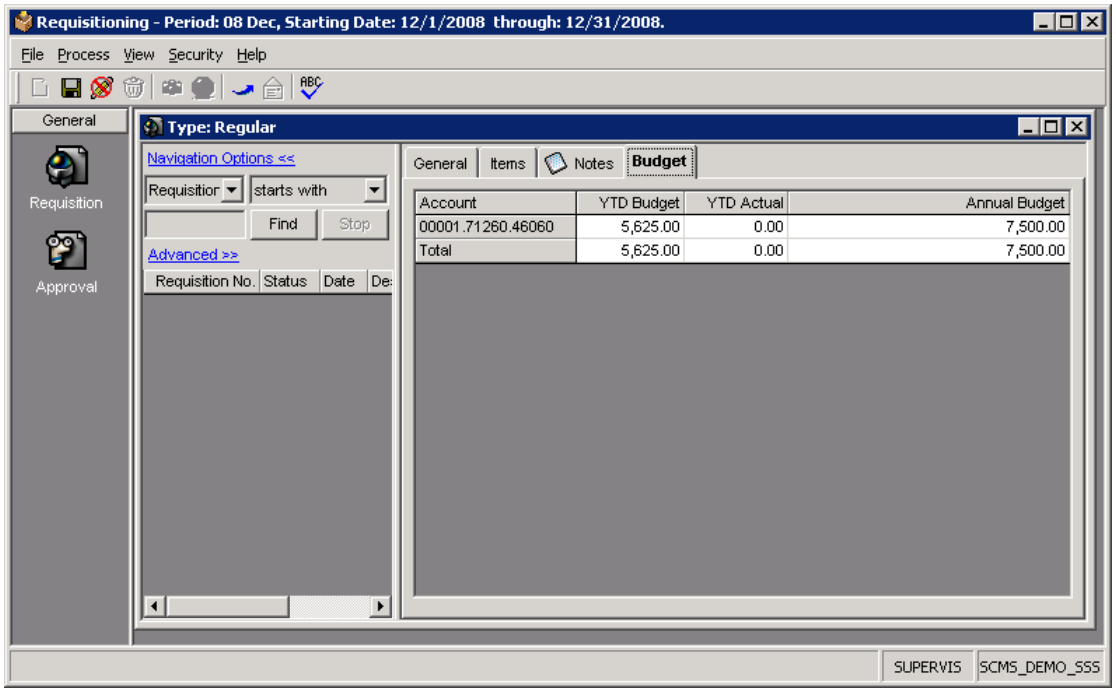

Figure 6: The **Budget** tab.

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.

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.

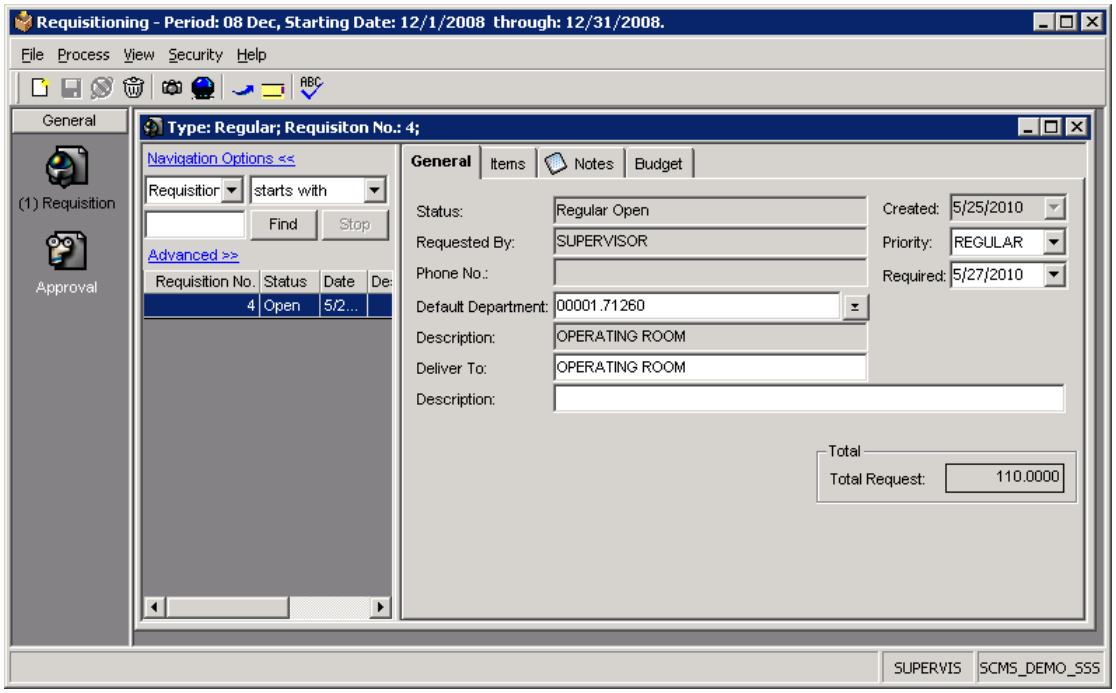

Figure 7: The **Requisitioning** window, with an open requisition selected.

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.

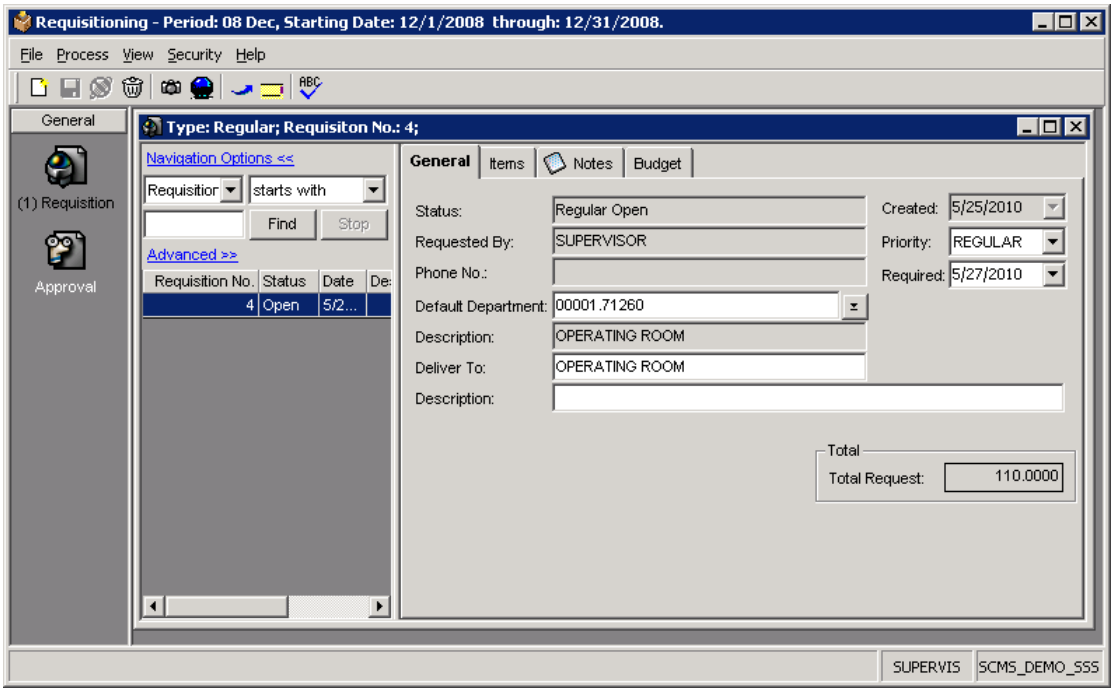

Figure 8: The **Requisitioning** window, with an open requisition selected.

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

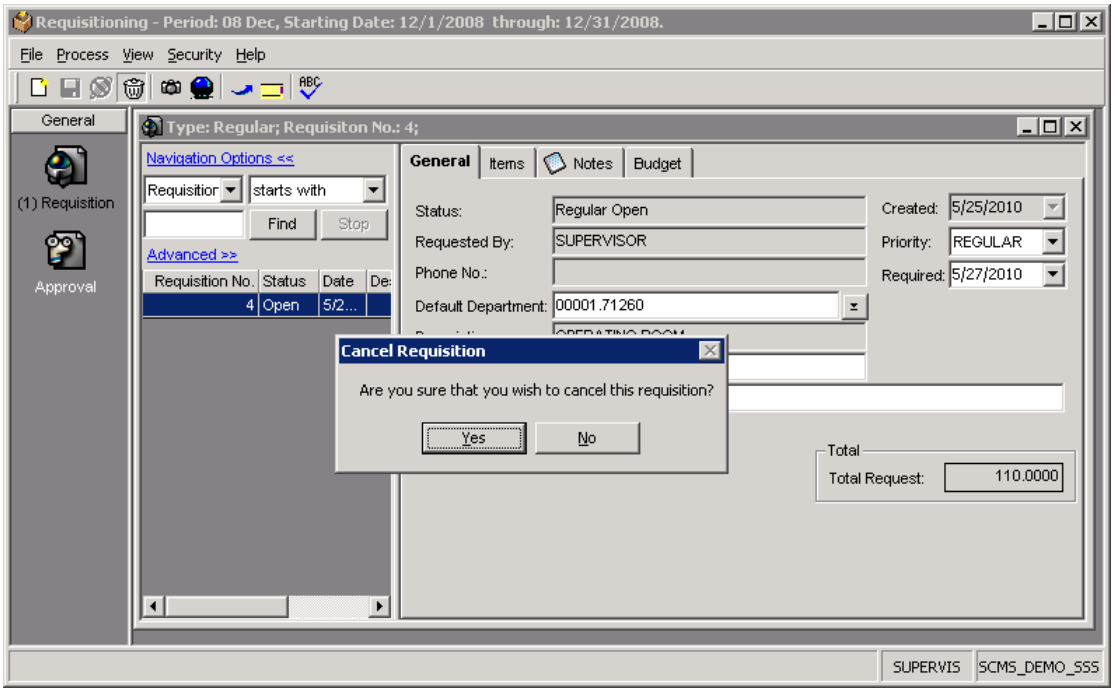

Figure 9: Confirmation box for deleting an open requisition.

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.

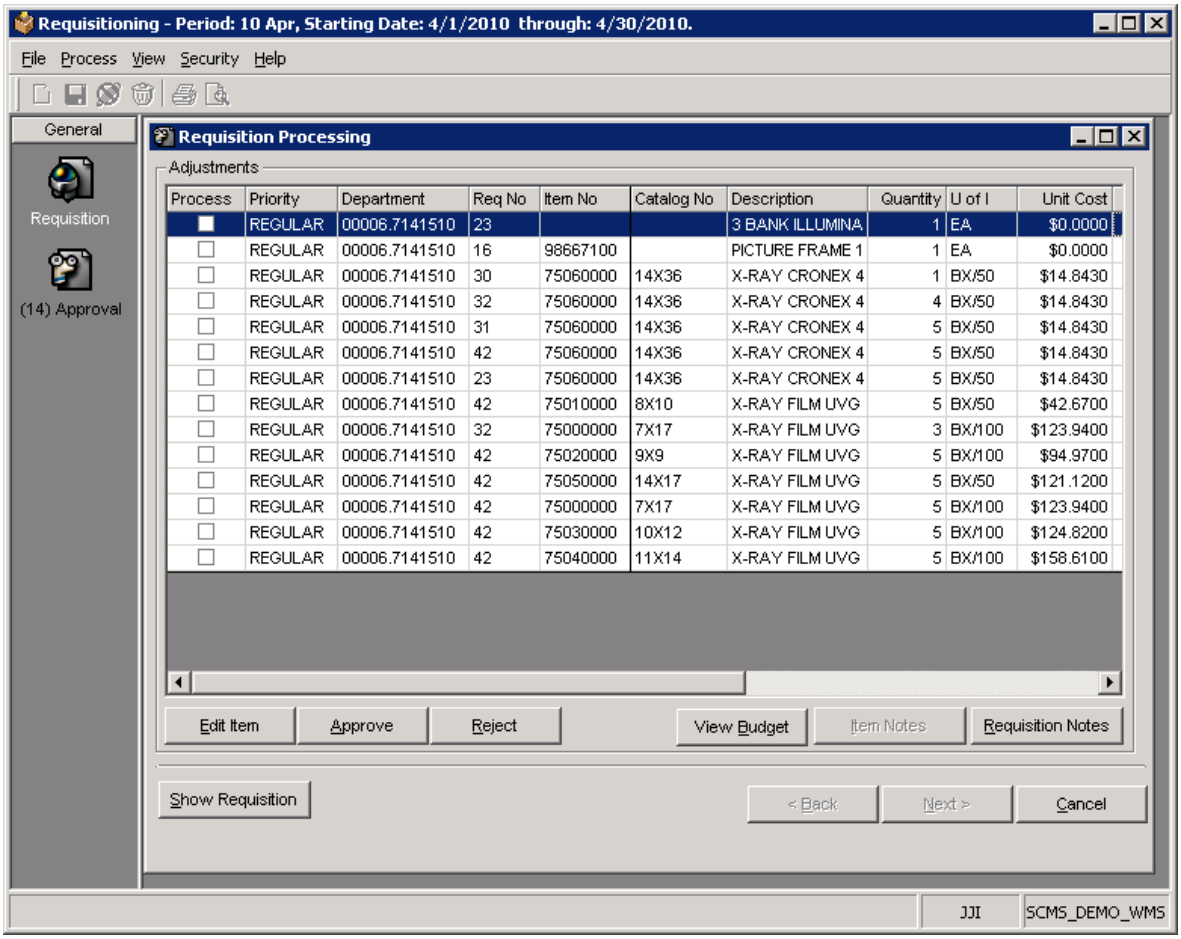

Figure 10: The **Requisition Processing** window for approving requisitions.

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**).

l. **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.

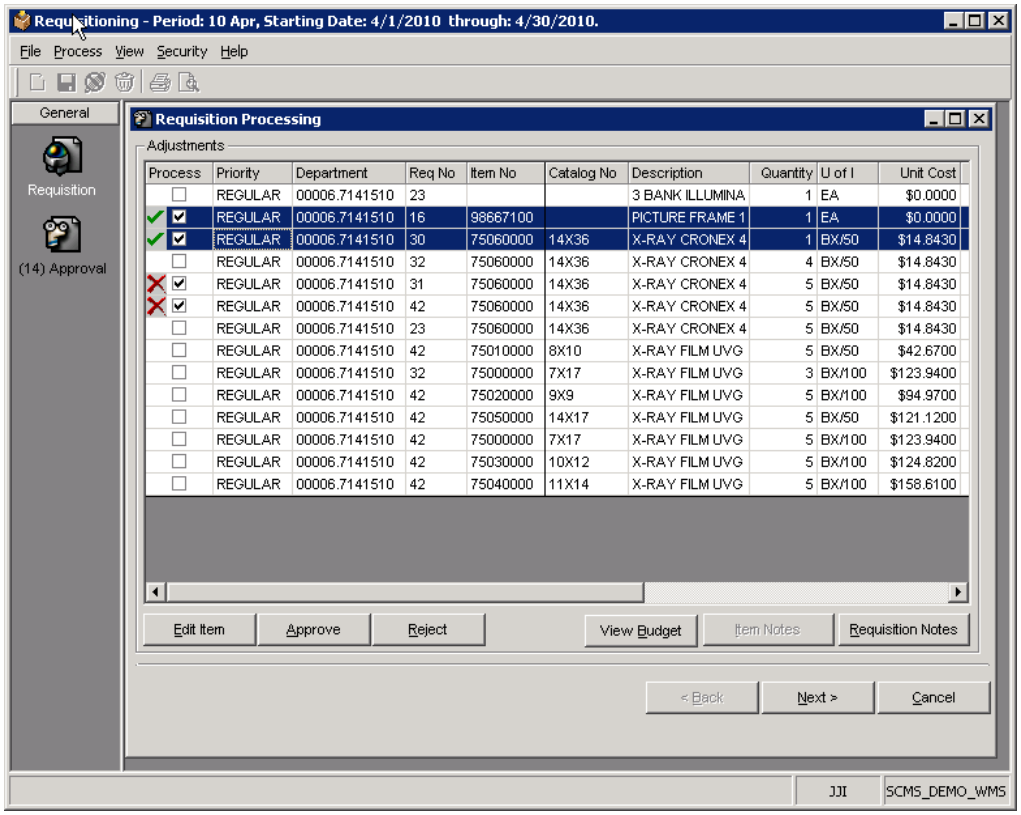

Figure 11: Two line items selected for approval and two line items selected for rejection.

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**).
    l. **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 one item can be edited at a time.

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

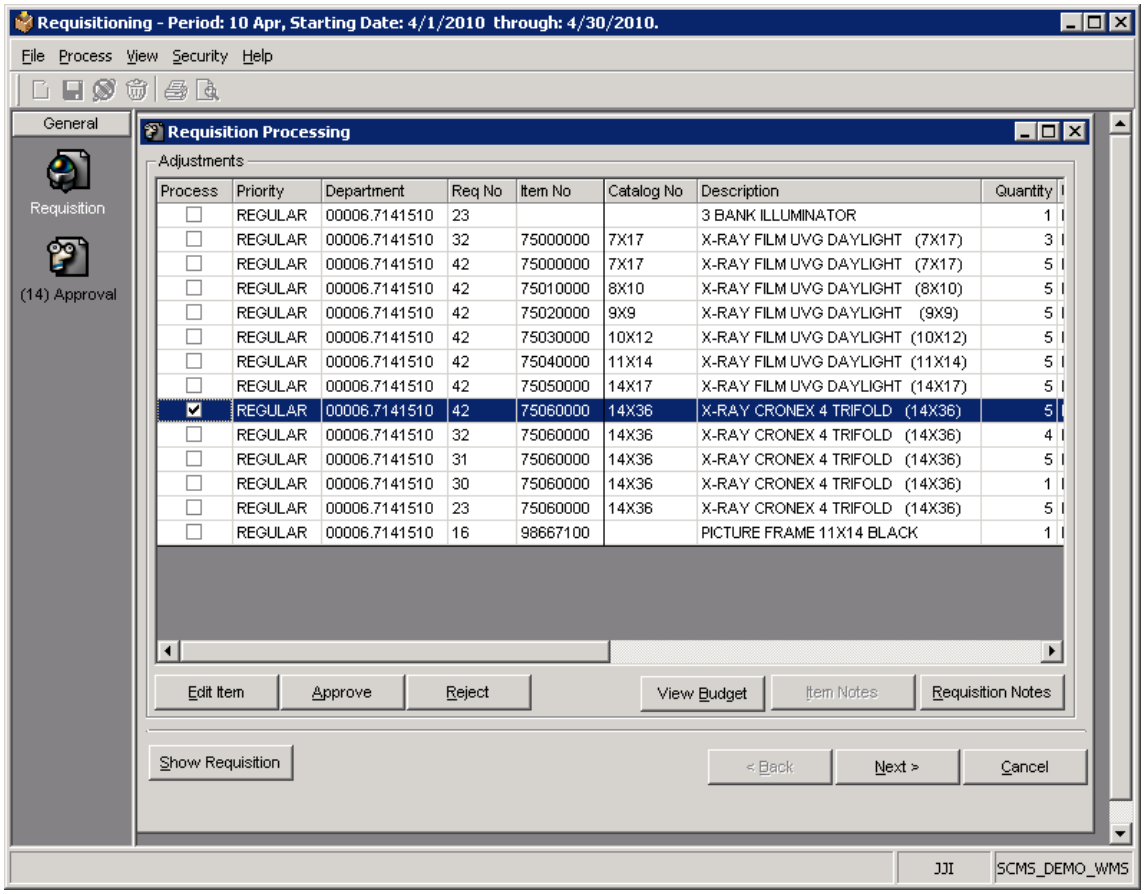

Figure 12: An item's **Process** checkbox is checked; the **Edit Item** button on the bottom left is ready for use.

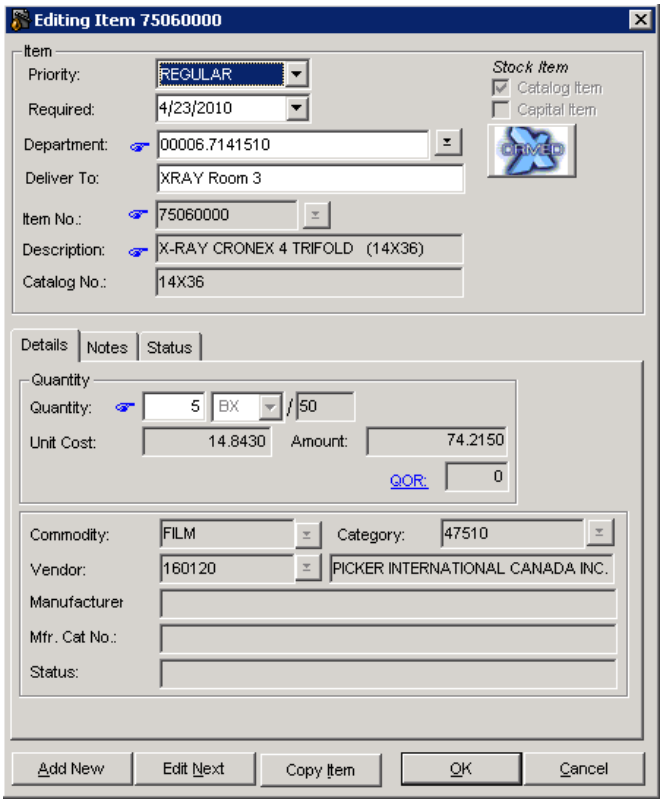

Figure 13: The **Editing Item** window.

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.

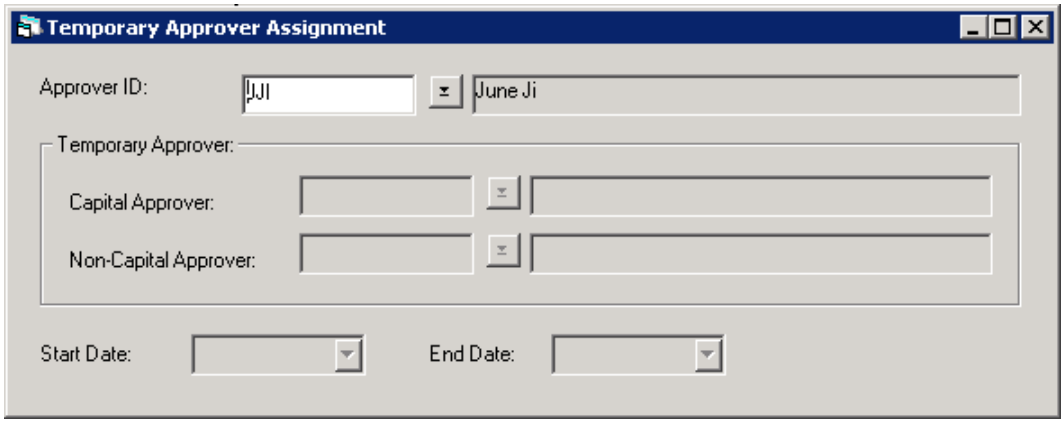

Figure 14: The **Temporary Approver Assignment** window.

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 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 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** icon 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.

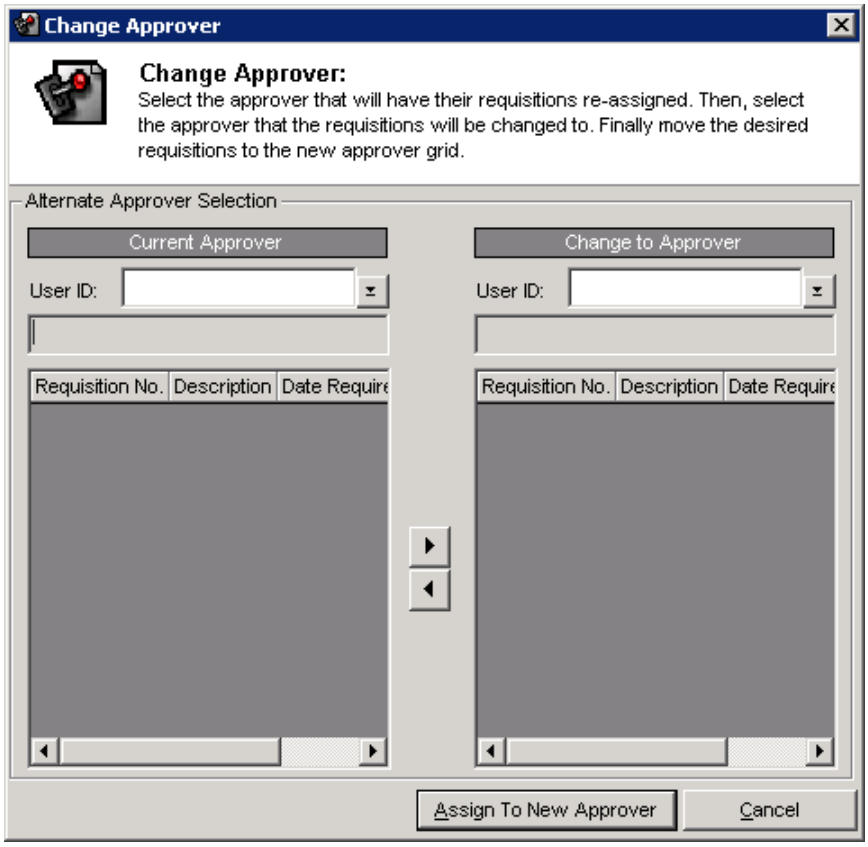

Figure 15: The **Change Approver** window.

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 button, search for and select the approver to assign the requisitions to, then click **Use**.

4. Using the and 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.

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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.

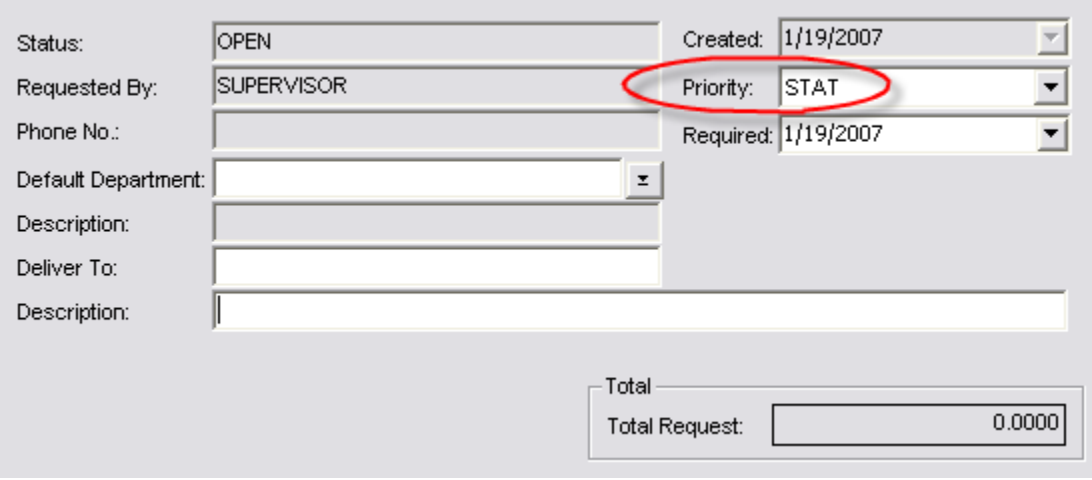

Figure 16: A **STAT** requisition in Ormed Requisitioning

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:

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 Procedures – Approver 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.

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 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.

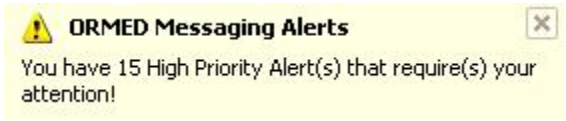

Figure 19: The unread alerts warning bubble.

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.
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.
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 , 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.

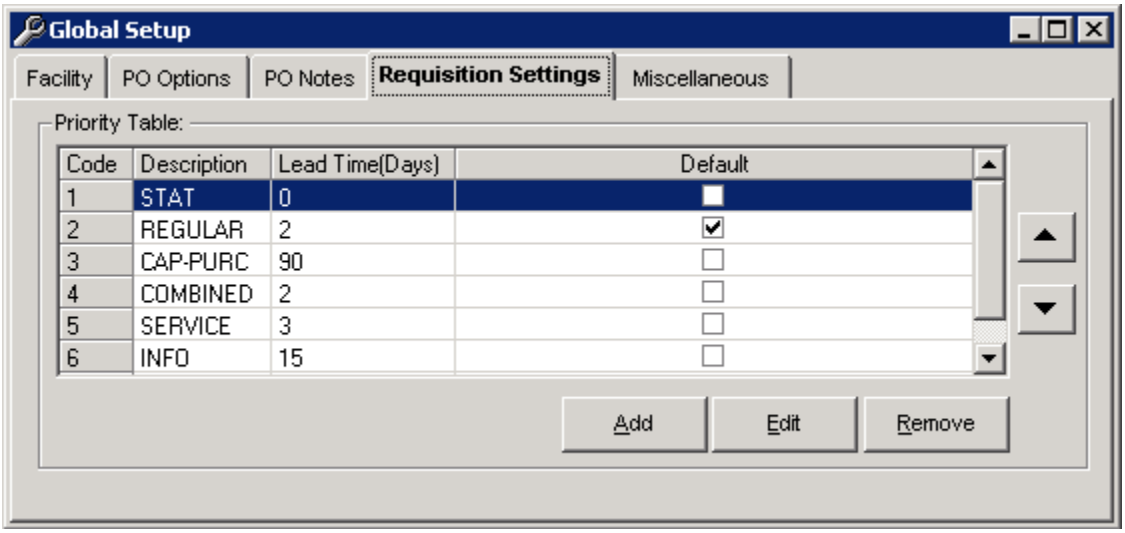

Figure 20: The **Requisition Settings** tab, showing the requisition priority table, in Ormed MM Manager's **Global Setup**.

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.

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Contact Us

Questions and Support

If you have any questions or concerns about this document, please e-mail scms_support@ormed.com. 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 feedback@ormed.com with the subject line **Feedback - Ormed Requisitioning User Guide**. Your feedback assists us in better serving you.

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