



How to Retrieve and Verify or Cancel a Requisition Training Manual

Version Date: March 2021

Accountable Author: Jo-Ann Ross





Table of Contents

| | |
|--|---|
| How to Retrieve and Verify or Cancel a Requisition | 3 |
| Step 1 | 3 |
| Step 2 | 5 |
| Step 3 | 5 |



How to Retrieve and Verify or Cancel a Requisition

See the how to document below with the steps to retrieve and action the requisitions in question

Step 1

In the **Requisitioning Desktop**, click on the **Purchase Reqs** button on the right hand side

The screenshot shows the 'My Tasks' interface in the Requisitioning Desktop. The top header bar is green and contains the following information:

- My Tasks** (left)
- User:** KHANSA01RV (middle)
- Date Range:** 27/01/21 - 03/02/21 (right)
- Status:** OPEN (middle)
- Type:** All (right)

Below the header is a table with the following columns:

| ✓ | Task Description | Range | Dept/Inv | Vendor | Date | Obj. Status | User | Launch |
|---|------------------|-------|----------|--------|------|-------------|------|--------|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Below the table is a section with the following fields:

| | | | | |
|---------------------------------|--|--|--|--|
| Task Number Type Status | | | | |
| PO/Req Number Buyer on PO/Req | | | | |
| Total for PO/Req Lines | | | | |
| Auto Receive PO from Req | | | | |
| Message | | | | |
| Events for Task | | | | |
| Error Message | | | | |

At the bottom of the interface is a toolbar with the following buttons:

- Print Tasks
- List Tasks
- Send Message
- Add Message
- ReAssign Tasks
- Change Status
- Task History
- List History
- Manage FYIs
- Refresh

On the right side, there is a sidebar menu with the following items:

- Process Tasks
- Purchase Reqs (highlighted with a blue arrow)
- Req Inquiry
- Req From Inv
- Item Reqs
- Restk Req Multi
- Inventory Reqs
- Exchange Carts
- Patient Issues
- Inv Routines
- Purchase Order
- PO Inquiry
- Check PO Num
- Shipping Notice
- Item Inquiry
- Stock Inquiry
- HHT
- Work Orders
- Reports
- Custom Reports
- Select
- System Status
- Preferences



Select your Purchasing Facility

MM.ROV - Requisitioning Desktop - MM.ROV - Requisitioning Desktop - (ROV TEST (N) - Test) - Salma Khan

Purchase Reqs

Facility: Req Num: Ship To: Req Type: Deliver To: Amount:

Purchasing Facility

Process Tasks

- Purchase Reqs
- Req Inquiry
- Req From Inv
- Item Reqs
- Restk Req Multi

In the **Requisitioning Desktop**, click on the **Select** button on the right hand side

MM.ROV - Requisitioning Desktop - MM.ROV - Requisitioning Desktop - (ROV TEST (N) - Test) - Salma Khan

Purchase Reqs

Facility: GBH.MM Req Type: Deliver To: Amount:

Purchasing Facility

| Req Number | Req Type | Status | Order Date | Buyer | Department | Lines |
|------------|----------|--------|------------|-------|------------|-------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | | | | | | |
|------------------|--|-----------------|--|-------|----|----|
| Req Total | | Verify Group | | Level | By | On |
| Inventory | | Levels Required | | | | |
| Responsible User | | Last Line Num | | | | |
| Req Status | | | | | | |
| Status Date | | | | | | |
| Status Upd By | | | | | | |

Process Tasks

- Purchase Reqs
- Req Inquiry
- Req From Inv
- Item Reqs
- Restk Req Multi
- Inventory Reqs
- Exchange Carts
- Patient Issues
- Inv Routines
- Purchase Order
- PO Inquiry
- Check PO Num
- Shipping Notice
- Item Inquiry
- Stock Inquiry
- HHT
- Work Orders
- Reports
- Custom Reports
- Select
- System Status
- Preferences

Create New General Data Lines Punch Out Delete Line Finalize Lines Verify Print Create From NonStock Req Inquiry Other Functions Refresh Cancel



Step 2

In the Select Purchasing Requisitions screen enter **New** in the Starting Selection, select the Purchasing Facility and enter the requisition number in the From and Thru Purchase Req number field and Press the F12 key or the OK Button as shown below

MM.ROV - Select Purchasing Requisitions

*Starting Selections: NEW

*Purchase Facility: GBH.MM

From Purchase Req Number: BEGINNING
Thru Purchase Req Number: END

From Order Date: [Dropdown]

Status: [List Box]

Type: [Text Box]
Responsible User: [Text Box]
Buyer: [Text Box]
Department: [Text Box]

Cancel OK

Step 3

This will populate the Requisition on your main screen. Based on your access you will have the ability to **Print** and **Cancel** your requisition and only few of you will have the ability to **Verify** the requisition.

Purchase Reqs

Req Num: 00000004
Ship To: [Text Box]
Deliver To: [Text Box]
Amount: 141.60

Purchasing Facility: NB,MM

| Req Number | Req Type | Status | Order Date | Buyer | Department | Lines |
|------------|----------|---------|------------|-------|----------------|-------|
| 00000004 | PURCHASE | WORKING | 18/08/19 | | 03071310200000 | 1 |

Req Total: 141.6000
Inventory: [Text Box]
Responsible User: THERL101NB
Req Status: WORKING
Status Date: 18/08/19

Verify Group: [Text Box]
Levels Required: 1
Last Line Num: 1

Level: [Text Box] By: [Text Box] On: [Text Box]

Process Tasks

- Purchase Reqs
- Req Inquiry
- Req From Inv
- Item Reqs
- Restk Req Multi
- Inventory Reqs
- Exchange Carts
- Patient Issues
- Inv Routines
- Purchase Order
- PO Inquiry
- Check PO Num
- Shipping Notice
- Item Inquiry
- Stock Inquiry
- HHT
- Work Orders
- Reports
- Custom Reports
- Select
- System Status
- Preferences

MEDITECH Health Care Information System

Cancel Assign to Facility