



Connecting Access Regional Exchange

# Materials Management Requisitions



# 3 Types of Requisitions

1. **Item Requisitions:** A combination of a Purchase Requisition and an Inventory Requisition. The end user does not need to know which items are stocked or which items are direct purchase. Expense will separate these items when the requisition is processed by Materials Management.
2. **Purchase Requisitions:** For items purchased as needed and not stocked in the warehouse. Also referred to as direct purchases.
3. **Inventory Requisitions:** for items stocked in hospital Stores.

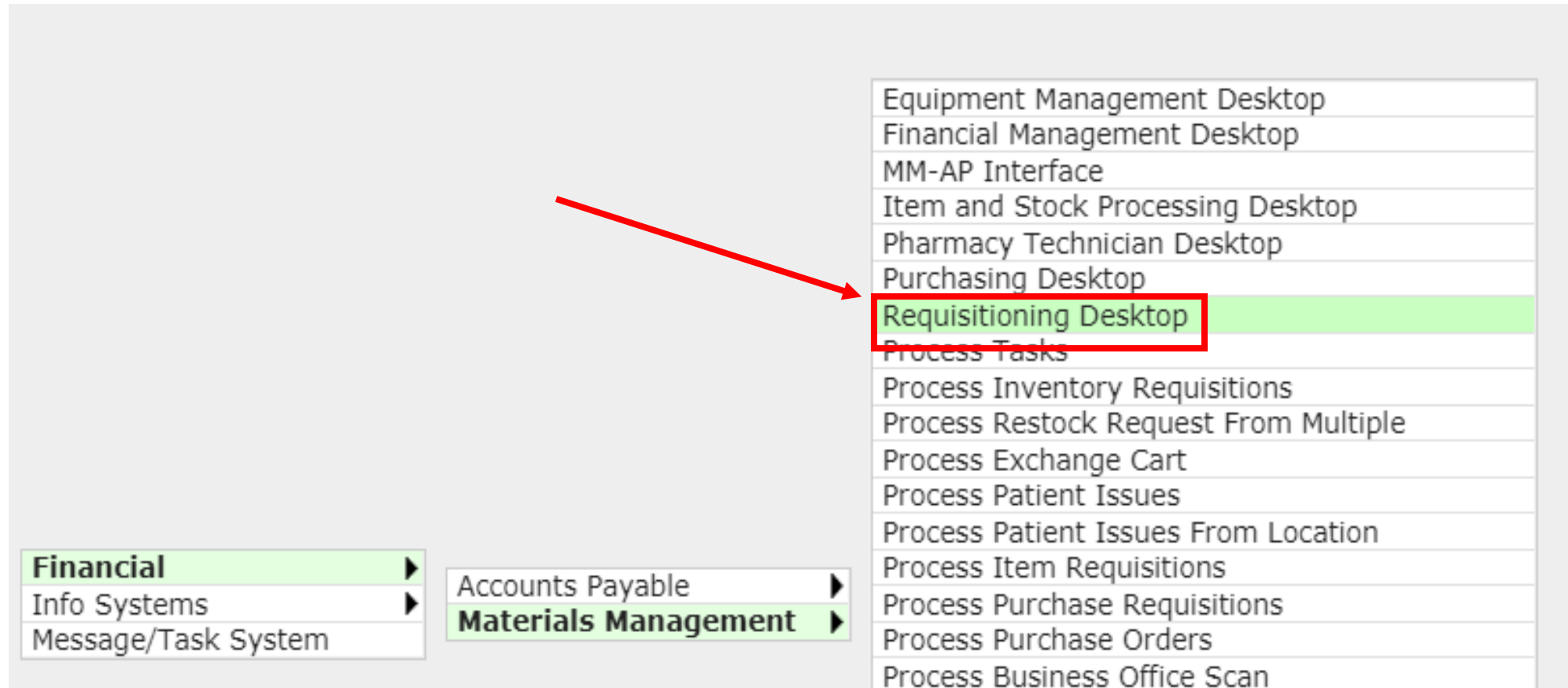
**Note:** Item Requisitions are best practice and will be the focus of this training module.

# How To Create Item Requisitions



# Accessing Requisitions

To access any requisition go to the **Requisitioning Desktop**:



The screenshot displays a software interface with a menu structure. On the left, there are three main categories: **Financial**, **Info Systems**, and **Message/Task System**. The **Financial** category is expanded, showing **Accounts Payable** and **Materials Management**. The **Materials Management** category is further expanded, revealing a list of options. A red arrow points to the **Requisitioning Desktop** option, which is highlighted in light green. The list of options under **Materials Management** includes: Equipment Management Desktop, Financial Management Desktop, MM-AP Interface, Item and Stock Processing Desktop, Pharmacy Technician Desktop, Purchasing Desktop, Requisitioning Desktop, Process Tasks, Process Inventory Requisitions, Process Restock Request From Multiple, Process Exchange Cart, Process Patient Issues, Process Patient Issues From Location, Process Item Requisitions, Process Purchase Requisitions, Process Purchase Orders, and Process Business Office Scan.

<b>Financial</b>	▶	
Info Systems	▶	
Message/Task System		
<b>Accounts Payable</b>	▶	
<b>Materials Management</b>	▶	
		Equipment Management Desktop
		Financial Management Desktop
		MM-AP Interface
		Item and Stock Processing Desktop
		Pharmacy Technician Desktop
		Purchasing Desktop
		<b>Requisitioning Desktop</b>
		Process Tasks
		Process Inventory Requisitions
		Process Restock Request From Multiple
		Process Exchange Cart
		Process Patient Issues
		Process Patient Issues From Location
		Process Item Requisitions
		Process Purchase Requisitions
		Process Purchase Orders
		Process Business Office Scan

# Step 1: Create an “Item Requisition”

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

**My Tasks**      User: KHANSA01RV      Date Range: 26/01/21 - 02/02/21  
Status: OPEN  
Type: All

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

Process Tasks

- Purchase Reqs
- Req Inquiry
- Req From Inv
- Item Reqs**
- Restk Req Multi
- Inventory Reqs
- Exchange Carts
- Patient Issues
- Inv Routines

Select 'Item Reqs'

# Step 2: Create a New Requisition

Item Requisitions

Ship To: Deliver To:

Req Num: Purchase Total:

\* Purchasing Facility RVH.MM

MM.ROV - Initiate Item Requisition

Req

Purchasing Facility RVH.MM

Item Req Template

\* Department

Deliver To

Ship To

Cancel OK

Create New Req Enter or Edit Lines Quick Enter Punch Out Enter or Edit Comments Verify Post Cancel List Create/Modify Template Refresh Cancel

Select 'Create New Req'

# Step 3: Select a Purchasing Facility

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

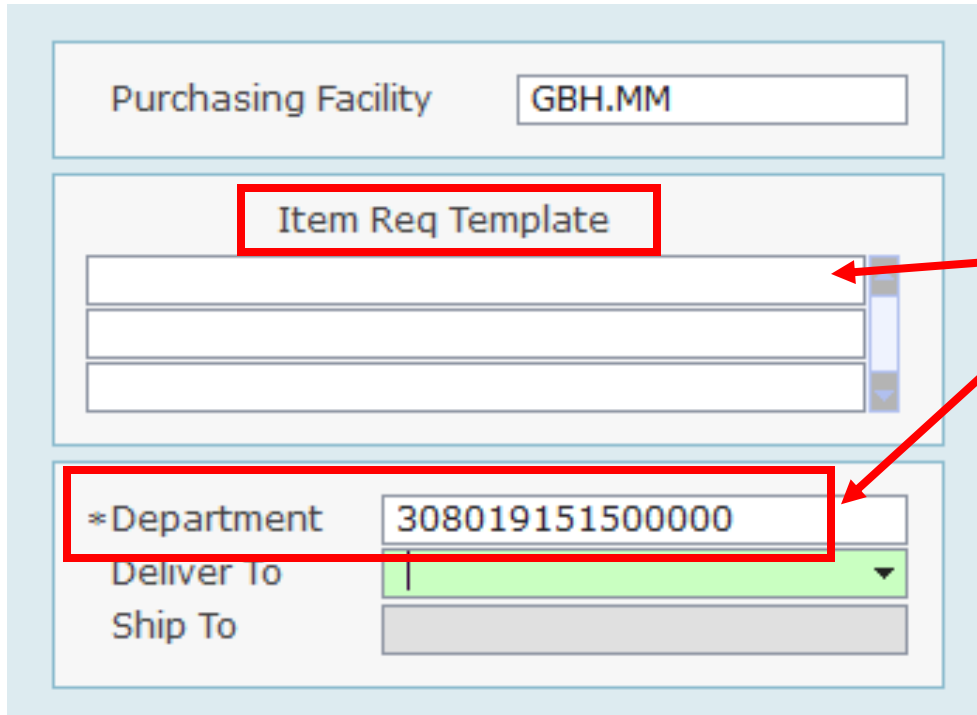
<b>Item Requisitions</b>	Facility:	Department:
	Ship To:	Deliver To:
	Req Num:	Purchase Total:

\*Purchasing Facility

Process Tasks  
Purchase Reqs  
Req Inquiry  
Req From Inv  
Item Reqs

Use drop-down menu to select purchasing facility

# Step 4: Select Requisition Template



Purchasing Facility GBH.MM

Item Req Template

\*Department 308019151500000

Deliver To

Ship To

The screenshot shows a web form for selecting a requisition template. At the top, there is a text box for 'Purchasing Facility' containing 'GBH.MM'. Below it is a dropdown menu labeled 'Item Req Template' which is currently empty. A red box highlights this dropdown, and a red arrow points to it from the text on the right. Below the dropdown is a text box for '\*Department' containing the code '308019151500000', also highlighted with a red box and pointed to by a red arrow. Below the department field are three more fields: 'Deliver To' (a dropdown menu), and 'Ship To' (a text box).

Once the Purchasing Facility is selected, it will populate the drop-down menu of the **Item Requisition Templates** available.

The end user has the option to **select a template** or enter their **department code** and select items without the use of a template.

Once the information has been populated, click '**OK**'



Cancel OK

The screenshot shows a small dialog box with two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted with a red box, and a red arrow points to it from the text above.



# Step 4: Select Requisition Template

## Item Requisition Template

If you want to utilize an item requisition template, specify the template mnemonic here. Multiple requisitions templates can be used on one requisition. If the user that is creating the item requisition has limited access, then their lookups will be limited to templates that have their department(s), or are left blank. This is not a required field, so you can bypass it and add in lines manually if preferred.

## Department

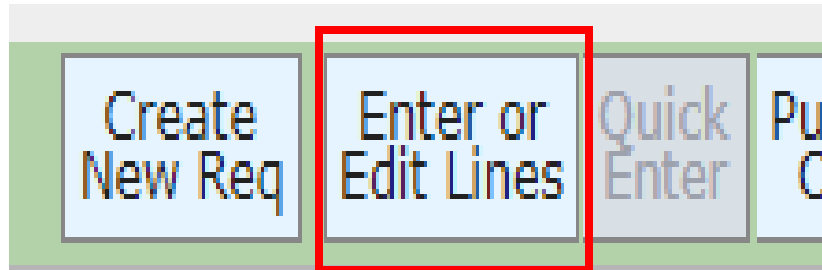
Enter the department the item requisition will be created for. A lookup for the departments you have access to will appear. If you have pulled in a template, the department field is populated with the department that is associated with that template

## Deliver To

This looks up to the Deliver To dictionary

# Step 5: Editing the Requisition

After selecting 'OK', you can now enter or edit the lines for this requisition



Click 'Enter or Edit Lines'

# Step 6: Entering Items and Quantities

Enter your items and quantities – again you will see the item packaging information on each item as you review

Purchasing Facility: GBH.MM      Ship To:  
Item Requisition Number: 0000000012      Deliver To:  
Department: 30801915150000

Line	*Item	Qty	Units	Inventory	*Vendor
1	005701 - MASK - ISOLATION LEVEL 2	2	BX		V000005000
2	021039 - NEEDLE - 18 GA BLUNT FILTER	1	BX		V000001886
3					
4					
5					
6					
7					
8					
9					

Item Packaging	Category	JIT	CA/10 BX/100 EA	MS NESY	Y
Vendor Name	STEVENS COMPANY LIMITED, THE				
Vendor Catalog Num	333-305211				
Manufacturer	BECTON DI				
Mfr Catalog Num	305211				
Tax Code	Inventory QoH				

# When Entering a Quantity

- Under the **Item field**, if a template was used, the items that were on the template(s) that was chosen fills in – users can add or remove items
- They will also add in the quantity for items that they want to request
- By selecting an inventory, the system will generate an inventory requisition upon posting the item requisition
- If they request an item from an inventory, and there are not enough on hand, you will get a soft warning: **Qty on Hand: X!** The quantity will stay the same unless the user decides to move it, and it will go on to be added to the Inventory Requisition
- By bypassing the inventory and selecting a vendor, the system will generate a purchase requisition.

Item Requisition Number: 0000102      Deliver To:

Department: 01.6010

Line	*Item	Qty	Units	Inventory	Vendor
1	000010 - BLADE SURGICAL SIZE 15	2	BX	CS	
2	000003 - SUTURE VICRYL 3-0 PS-1 UND ...		EA		M0001
3	000016 - DRAPE STERI SURGICAL	2	BX		M0001
4	000018 - GLOVE SURGICAL BIOGEL SZ 7...		BX	ER	
5	000051 - GOWN SURGICAL 2-XL SIRUS		BX		V1
6	000038 - SPONGE GAUZE 8 X 4 NS		BX		V1
7					
8					
9					

Item Packaging | Category | JIT      BX/10 EA      STERILE

Vendor Name      CARDINAL

Vendor Catalog Num      CARD-38

Manufacturer      3M HEALTH

Mfr Catalog Num      3M34541

Tax Code | Inventory QoH

BLADE SCALPEL SURGICAL 15

Allergen/Hazardous

Deliver to Location      Instructions or Quantity

Message

Qty on hand: 0!

Close

# Step 7: Adding Items not on the Template

## *Get <F5> Routine*

**Get <F5>** Use this routine to do a search for an item within a template to adjust the quantity

The screenshot displays a software interface with a table of items and a message dialog box. The table has columns for Line, \*Item, Qty, Units, Inventory, and Vendor. The message dialog box, titled 'Message', contains the text 'Qty on hand: 0!' and a 'Close' button. Below the table, there are fields for Item Packaging, Category, JIT, Vendor Name, Vendor Catalog Num, Manufacturer, Mfr Catalog Num, Tax Code, Inventory QoH, Description, Allergen/Hazardous, Deliver to Location, and Instructions or Quantity. At the bottom right, there are 'Cancel' and 'Save' buttons.

Line	*Item	Qty	Units	Inventory	Vendor
1	000010 - BLADE SURGICAL SIZE 15	2	BX	CS	
2	000003 - SUTURE VICRYL 3-0 PS-1 UND ...		EA		M0001
3	000016 - DRAPE STERI SURGICAL	2	BX		M0001
4	000018 - GLOVE SURGICAL BIOGEL SZ 7...		BX	ER	
5	000051 - GOWN SURGICAL 2-XL SIRUS		BX		V1
6	000038 - SPONGE GAUZE 8 X 4 NS		BX		V1
7					
8					
9					

Get <F5>

Select  
Items

Delete Zero  
Quantity Lines

# Step 7: Adding Items not on the Template

## Select Items

Users can ultimately add an Item to the Requisition from their template by selecting the next (blank) line and initiate a search by Item# if they know the exact number, or search by keyword to add it.

## Select Items

Use this routine to select items that you want to add to the selected requisition

Line	Item	Qty	Units	Inventory	Vendor
1	003704 - HAND SANITIZER - AVAGARD 500...	1	BO	HHC.MAIN	
2	006158 - BATTERY SIZE AA	1	BX		V000000376
3	004240 - GLOVE - STERLING - MED 12"	2	BX		V000000376
4	007861 - GLOVE NITRILE EXT CUFF MEDIUM	5	BX		V000001886
5					
6					
7					
8					
9					

Item Packaging  Category  JIT	
Vendor Name	
Vendor Catalog Num	
Manufacturer	
Mfr Catalog Num	
Tax Code  Inventory QoH	
Description	
Allergen/Hazardous	
Deliver to Location	Instructions or Quantity

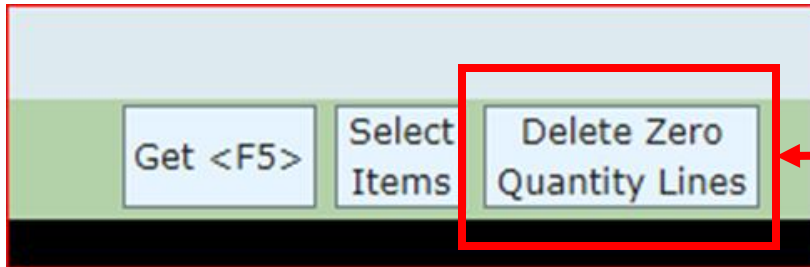
Get <F5>   Select Items   Delete Zero Quantity Lines   Cancel   Save

Get <F5>   **Select Items**   Delete Zero Quantity Lines

# Step 7: Adding Items not on the Template

## *Zero Quantity Lines*

Before you can save the requisition, users must **delete** the **Zero Quantity Lines** to remove any of the items that they did not request with a quantity.



Click 'Delete Zero  
Quantity Lines'

# Step 8: Adding Comments or Notes

Comments / Notes can be added to the Requisition  
(i.e., special instructions for the delivery and/or to the attention of a specific user.)

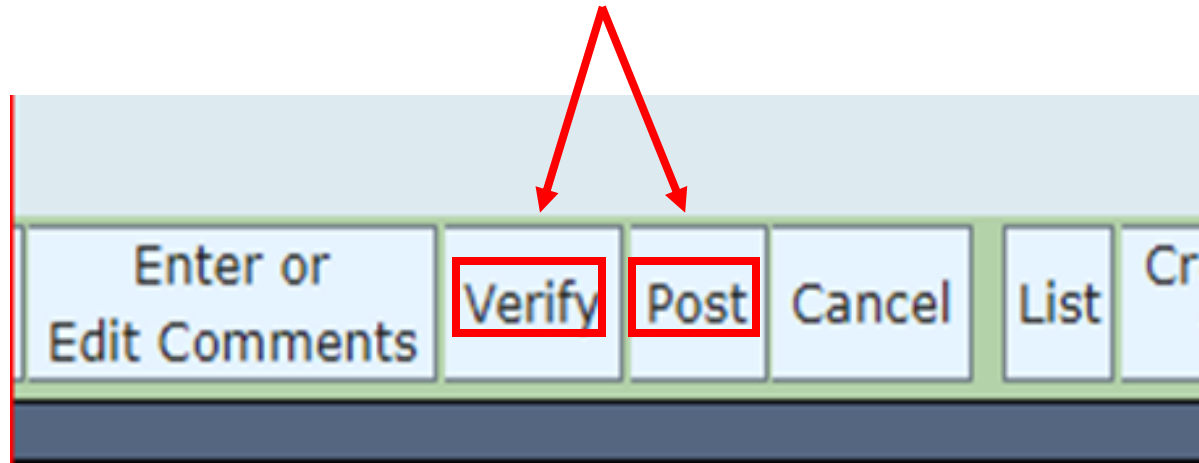
The image shows two screenshots from a software interface. The top screenshot shows a row of buttons: 'Enter or Edit Lines', 'Quick Enter', 'Punch Out', 'Enter or Edit Comments', 'Verify', 'Post', and 'Cancel'. The 'Enter or Edit Comments' button is highlighted with a red box, and a red arrow points to it from the top right. A blue curved arrow points from this screenshot down to the second screenshot. The second screenshot shows a dialog box titled 'Item Requisition Comments'. Inside the dialog, there is a text area containing the following text: '\*\*\* NEXT BUSINESS DAY DELIVERY REQUIRED \*\*\*', 'Delivery instructions: Attention of \*insert name\*', and 'Please call: 905-xxx-xxxx upon delivery'. Below the text area is a green horizontal bar. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red box, and a red arrow points to it from the right side of the dialog box.

- Once notes are entered, click **'SAVE'**
- Notes will automatically appear on the Purchase Order.



# Step 9: Review and Verify Requisition

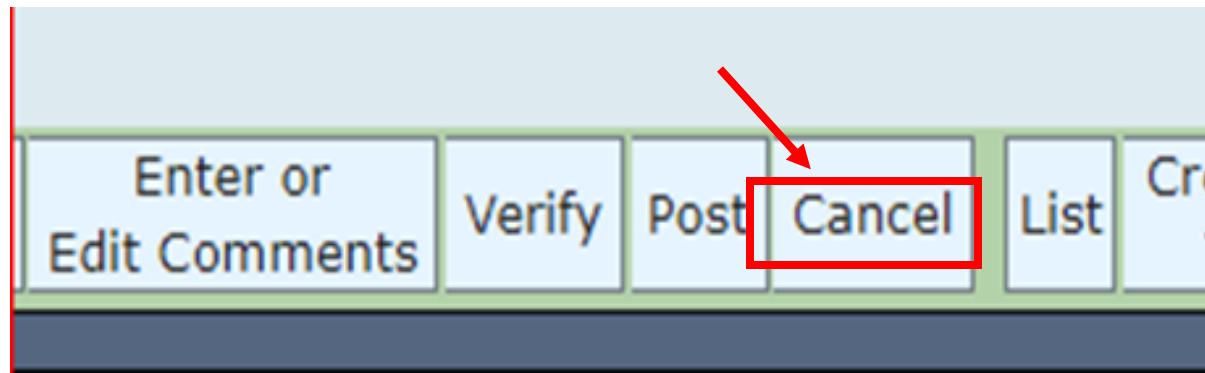
- Review your requisition prior to **verifying** and **posting**.
- Once your review is complete, the Requisition must be first “**VERIFIED**” by the authorized staff member (yourself or Department Manager User) and then successively “**POST**” it to ensure items are transmitted into a Purchase Order.
- When the requisition is in the Verified/Open status you can no longer add lines and/or comments as the information has been transmitted to the Purchasing Dept.



# How to Cancel your Requisition

Click to change the status of the selected item requisition from either WORKING or OPEN status to CANCELLED

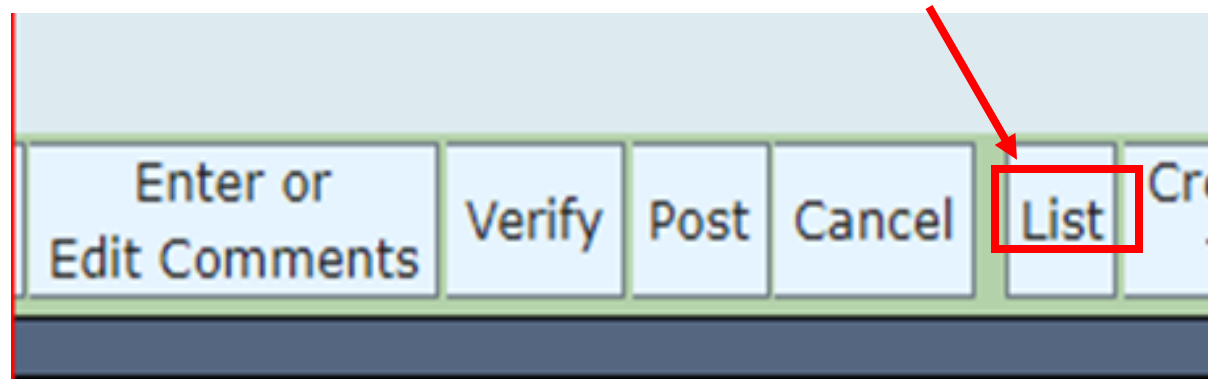
You can **cancel** your requisition as long as it has not been converted to a Purchase Order (PO). Therefore, **cancel** before a requisition is posted.



# How to Review a Requisition List

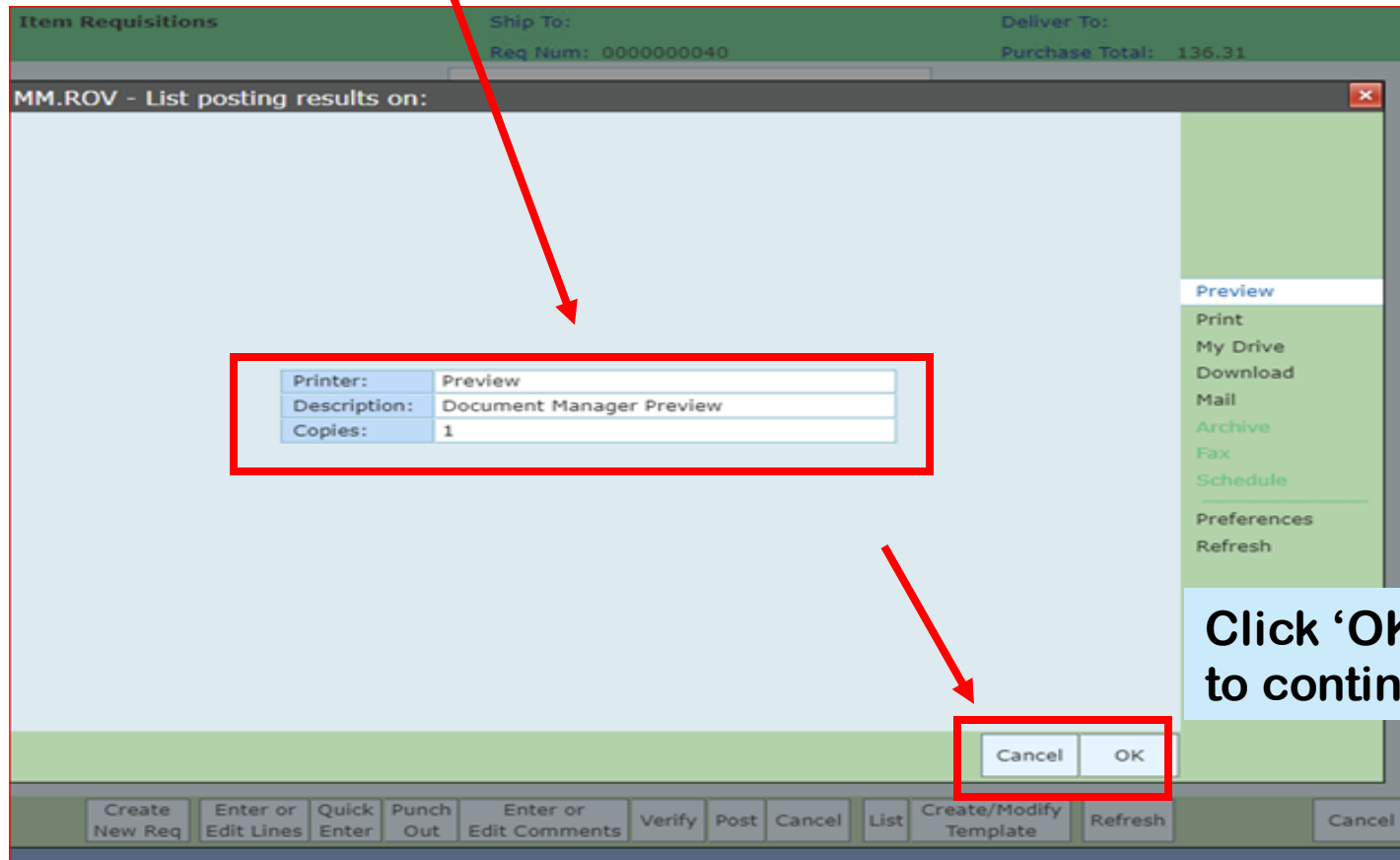
Use the '**List**' routine to include specific information on the Item Requisition Report.

This report can be used to list the purchase and/or inventory requisitions that were created from the selected item req.



# Step 10: After Posting a Requisition

When posted, a preview message will automatically appear on your screen with a confirmation of your new Requisition:



Click 'OK' or 'Cancel'  
to continue

# Step 11: Confirmation of New Requisition

After clicking 'OK', you can view the confirmation and details of your new Requisition (outlined in the **Item Requisition Post** below)

DATE: 16/04/21 @ 1303  
USER: ATTER001RV

Care4 MM - TEST  
Item Requisition Post

PAGE 1

Item Requisition Number: 0000000040 Purchasing Facility: HHC.MM

Posting Results

Purchase Requisition: 0000000033 Purchasing Facility: HHC.MM created and verified!

Stock Requisition: HHC.MAIN 19 created!

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Connecting Access Regional Exchange

# Materials Management (MM) Requisitions

Training – Manager / Director Approvals



# MM Requisitions

## *Manager / Director Approvals*

This training is for Managers / Directors and others who may be required to approve an Item Requisition created by someone with a lower dollar value approval level.



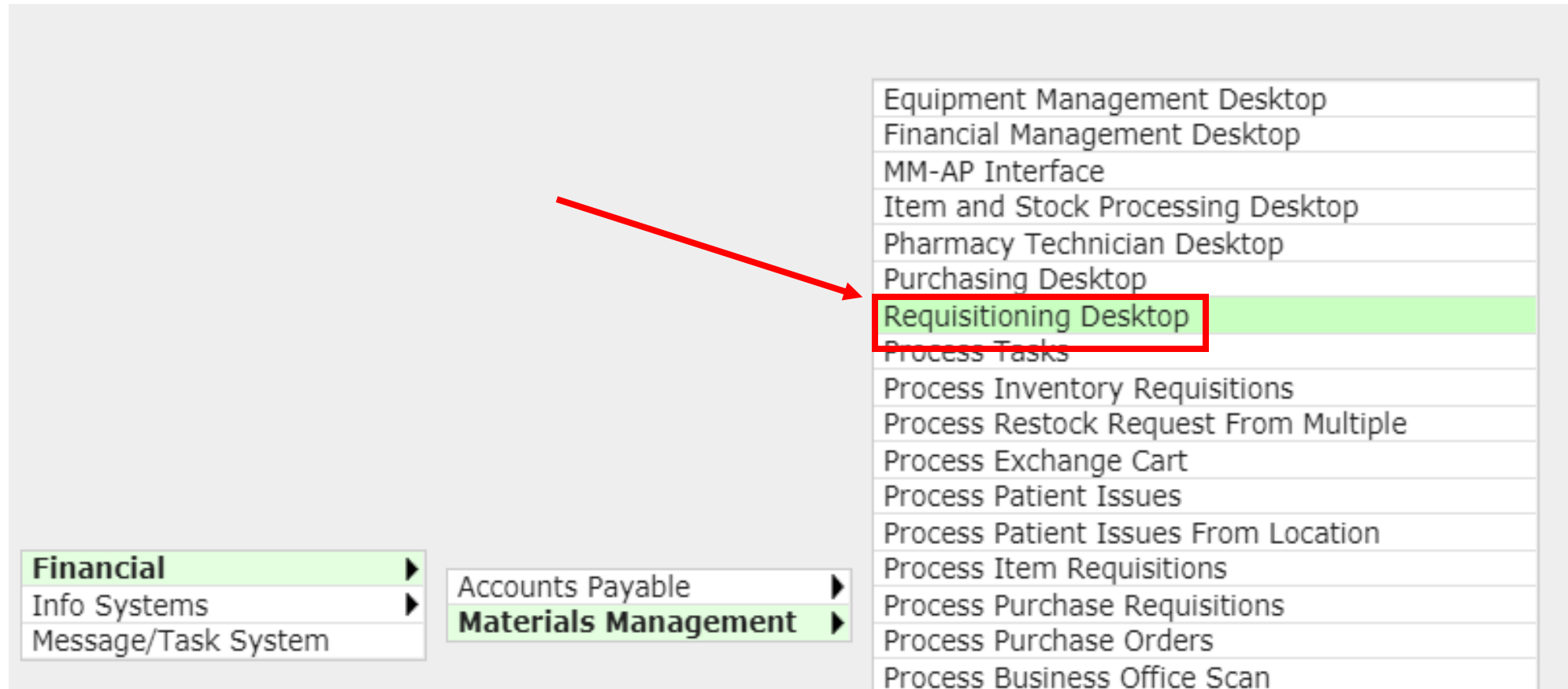
# 3 Types of Requisitions

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2. **Purchase Requisitions:** For items purchased as needed and not stocked in the warehouse. Also referred to as direct purchases.
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**Note:** Item Requisitions are best practice and will be the focus of this training module.

# Accessing Requisitions

To access any requisition go to the **Requisitioning Desktop**:



The screenshot shows a software interface with a menu on the right side. The menu items are:

- Equipment Management Desktop
- Financial Management Desktop
- MM-AP Interface
- Item and Stock Processing Desktop
- Pharmacy Technician Desktop
- Purchasing Desktop
- Requisitioning Desktop** (highlighted in green and circled in red)
- Process Tasks
- Process Inventory Requisitions
- Process Restock Request From Multiple
- Process Exchange Cart
- Process Patient Issues
- Process Patient Issues From Location
- Process Item Requisitions
- Process Purchase Requisitions
- Process Purchase Orders
- Process Business Office Scan

On the left side, there are two dropdown menus:

- Financial** (highlighted in green) with a right-pointing arrow. Below it are "Info Systems" and "Message/Task System".
- Materials Management** (highlighted in green) with a right-pointing arrow. Above it is "Accounts Payable".

A red arrow points from the left towards the "Requisitioning Desktop" menu item.



# Step 1: Verify and Submit an Existing Requisition

## Managers and Directors Verification of ITEM REQs

Managers/Directors that are required to verify and submit an existing Requisition must go to the **Requisitioning Desktop**, click on the **Item Reqs** button on the right hand side – then click **'Select'**

The screenshot displays the 'Item Requisitions' interface. At the top, it shows 'Ship To: Req Num: 0000000043' and 'Deliver To: Purchase Total: 350.12'. Below this is a 'Purchasing Facility' dropdown set to 'HHC,MM'. The main table lists requisitions with columns for Req Number, Status, Template, Department, Initiated By, and Number Lines. One requisition is listed: 0000000043, WORKING, H-NUTRITION, 50701195000000, ATTER001RV, 4. Below the table is a metadata table with columns for User, Date, and Device. The sidebar on the right contains a 'Process Tasks' menu with 'Item Reqs' highlighted by a red box and a red arrow. Another red box and arrow point to the 'Select' button at the bottom of the sidebar. The bottom of the interface features a toolbar with buttons for 'Create New Req', 'Enter or Edit Lines', 'Quick Enter', 'Punch Out', 'Enter or Edit Comments', 'Verify', 'Post', 'Cancel', 'List', 'Create/Modify Template', 'Refresh', and 'Cancel'.

Req Number	Status	Template	Department	Initiated By	Number Lines
0000000043	WORKING	H-NUTRITION	50701195000000	ATTER001RV	4

	User	Date	Device
Initiated By	ATTER001RV	20/04/21	HTML-2881-7241
Last Edit By	ATTER001RV	20/04/21	HTML-2881-7241
Posted By			

# Step 2: Selecting the Requisition

To populate the Requisition on your main screen, complete the following:

- In the **Starting Selections** field type '**New**'.
- Select/enter the **Purchasing Facility**
- Enter the requisition number in the **From Purchase Req Number & Thru Purchase Req Number** fields
- Click the **OK** button

The screenshot shows a software interface for selecting a requisition. It features several input fields and buttons. Red boxes and arrows highlight the following elements:

- The **\* Starting Selections** field, which contains the text **NEW**.
- The **\* Purchase Facility** field, which contains the text **HHC.MM**.
- The **From Purchase Req Number** and **Thru Purchase Req Number** fields, both containing the value **0000000034**.
- The **OK** button at the bottom right of the form.

Other visible fields include **From Order Date** (a dropdown menu), **Status** (a list box), **Type**, **Responsible User**, **Buyer**, and **Department** (text input fields).

# Step 3: Verifying and Posting your Requisition

**Please note:** Based on the **Verify-Level groups access**, you will have the ability to **Print / Cancel**. Once reviewed, you must **Verify** and **Post** your requisition.

The screenshot displays the 'Item Requisitions' interface. At the top, it shows 'Ship To: HHC.MM' and 'Purchase Total: 350.12'. Below this is a table with the following data:

Req Number	Status	Template	Department	Initiated By	Number Lines
0000000043	WORKING	H.NUTRITION	50701195000000	ATTERO01RV	4

Below the table is a summary table:

	User	Date	Device
Initiated By	ATTERO01RV	20/04/21	HTML-2881-7241
Last Edit By	ATTERO01RV	20/04/21	HTML-2881-7241
Posted By			

At the bottom of the interface, there is a toolbar with buttons: 'Create New Req', 'Enter or Edit Lines', 'Quick Enter', 'Punch Out', 'Enter or Edit Comment', 'Verify', 'Post', 'Cancel', 'List', 'Create/Modify Template', 'Refresh', and 'Cancel'. The 'Verify' button is highlighted with a red box and a red arrow. The 'Post' button is highlighted with a blue box and a blue arrow. The 'Cancel' button is highlighted with a blue box and a blue arrow.

On the right side, there is a 'Process Tasks' menu with options: 'PO Receive', 'Purchase Order Cost/Qty Chng', 'PO Inquiry', 'PO From Inv', 'PO From Req', 'Check PO Num', 'Purchase Reqs', 'Req Inquiry', 'Req From Inv', 'Item Reqs', 'Pur Routines', 'Other Inquiries', 'Contracts', 'Bid Worksheet', 'EDI', 'Reports', 'MM/AP Reports', 'Custom Reports', 'Select', 'Scanning', 'System Status', and 'Preferences'.



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