Requisitioning
Functional Overview
Ellipse EAM® 8.1
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# Definitions, Acronyms and Abbreviations

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Introduction

Ellipse 8 introduces a fully java based application suite with a simplified technical infrastructure (middleware) stack. As a consequence of this simplification, the MSQ applications available in previous versions of Ellipse are no longer available. While MSQ applications have been converted to MSE applications, the complexity of MSQ140 - Requisitioning was such that converting this application was not achievable. This was the catalyst for the review of how requisitioning is performed in Ellipse with a view of simplifying the process in Ellipse 8.1.

This document provides a high level overview of the different requisitioning processes and how these will be completed in Ellipse 8.1. It will discuss in detail the areas within Ellipse where requisitions can be created using the simplified process proposed for Ellipse 8.1. MSO requisitioning applications available in previous versions of Ellipse continue to be available in Ellipse 8.1, and new applications will be introduced to provide the mechanism for simplified requisitioning processes. It also introduces the concept of 'Shopping Cart'.

Scope

The scope of this functionality is contained within the following modules and will be available from Ellipse 8.1:

- Requisitions (3140)
- Purchasing (3210)
- Application Parts List (3130)
- Work Order (3620)
- LinkOne Integration (8031)
- Envoy Buyer (3110)

This version of the Functional Overview details how requisitioning will be conducted in Ellipse 8.1.

Audience

The intended audience of this document include Mincom business users, the relevant Mincom managers and functional consultants.

Security

Standard Ellipse security applies.
Overview

There are 2 broad requisition types in Ellipse:

- Warehouse Requisitions
- Purchase Requisitions

Warehouse Requisitions, also known as Issue Requisitions (IReqs) are used to requisition 'stocked' items; items which are held in inventory, in a warehouse. Purchase Requisitions are used to requisition items which are not held in inventory, and therefore need to be 'purchased'.

Within Warehouse Requisitions, there are a number of different requisition types. These include normal issue, loan, recall, and rotation requisitions.

In Ellipse 8.1, all requisitioning processes have their own individual MSO applications used to create and maintain their requisitions. In addition to these MSO applications, the inclusion of the Virtual Catalogue search application and the shopping cart have been introduced which can be used to create Normal-Issue Warehouse and Purchase requisitions. These constitute the majority of all requisitions created.

The Shopping Cart is a mechanism, similar to those used in internet shopping, that the user can use to collect a number of stocked and non-stocked items. When the collection is complete, the shopping cart can then be 'checked out'. The 'check out' process looks at all items in the shopping cart and then creates the required normal-issue issue requisitions and purchase requisitions. Depending on the items in the cart, the inventory / purchasing control settings, and the user's security, purchase requisitions can automatically be lived into purchase orders as part of the checkout process.

Requisitioning Applications Available

The following applications will be available in Ellipse 8.1 to support the requisitioning processes:

- **MSO140 – Maintain Warehouse Requisition.** MSO140 provides the ability to create multi line Issue and Purchase Requisitions, there is no capability to search or modify requisitions
- **MSO14S – Short Form Warehouse Requisition.** MSO14S provides the ability to create an Issue Requisition with a maximum of two items, there is no capability to search or modify requisitions.
- **MSO14R – Credit/Return Warehouse Requisition.** MSO14R provides the ability to create multi line Credit Returns of stock items, there is no capability to search or modify requisitions.
- **MSO14P – Purchase Requisition.** MSO14P provides the ability to create multi line Purchase Requisitions, there is no capability to search or modify Purchase Requisitions
- **MSO14T – Rotation Requisition.** MSO14T provides the ability to create multi line Rotation Requisitions and there is no capability to search or modify Rotation Requisitions
- **MSO14L – Loan Requisition.** MSO14L provides the ability to create multi line Loan Requisitions, there is no capability to search or modify Loan Requisitions
- **MSO14E – Stores Sales.** MSO14E is called via the Stores Sales (MSO573) process, it cannot be called directly and it provides the ability to create multi line Sales Requisitions, there is no capability to search or modify Sales Requisitions.
- **MSO14M – Recall Requisition.** MSO14M provides the ability to create multi line Recall Requisitions, there is no capability to search or modify Recall Requisitions.
- **MSO144 – Requisition Maintenance.** MSO144 provides the capability to modify the various types of requisitions (issue, purchase, loan, recall, rotation) subject to security access and Requisition Header and Item status, there is no capability to create or search for requisitions.
- **MSO141 – Review Requisitions.** MSO141 is a review program only for issue and purchase requisitions, there is no capability to modify or create requisitions.
- **MSO23A – Review Requisitions.** MSO23A is a similar program to MSO141 only with additional 'filters' for searching, there is no capability to modify or create requisitions.
- **MSEVRC – Virtual Catalogue Requisitioning.** This program was based on the Envoy Product and is the central application in the 'simplified requisitioning' process. It allows the user to search for stocked and non-stocked items and add to the shopping cart ready to checkout/requisition.
• **MSEGT – Shopping Cart Check-Out.** This program is the application used to finalise the shopping cart and create the requisitions needed for the items in the cart.

**Simplified Requisitioning**

The following diagram identifies the areas of requisitioning which will be enhanced to simplify the requisitioning process. These processes will be discussed in greater detail below.
Process Overview

Shopping Cart

Ellipse 8.1 introduces the concept of a shopping cart for requisitioning. This functionality allows the user to collect shopping cart of items (stock and non-stock) for processing at a later time. When the shopping cart is complete, the user can check out the cart and create the necessary warehouse and purchase requisitions, and where able, live the purchase requisitions into purchase orders. Items in the shopping cart will display information about the stock code including Stock on Hand at the time of entry into the shopping cart along with a visual icon denoting if stock is available in the user's district.

The shopping cart changes the way Ellipse works with requisitions from:

- Creation of Requisition Header and then add items
- Collect items and then create the Requisitions to match items selected

There are 2 views of the shopping cart:

- Widget view
- Checkout view

The first is a widget view which is available from all Ellipse applications and can be opened and closed using the options menu on the Ellipse explorer.

The second is on the check out application where the items in the cart can be updated (quantity) or removed. See the Check Out process below for details of this screen. The Check Out application can be accessed via the menu or quick launch of MSEEGT, or via the 'Checkout' button on the Shopping Cart Widget.

Purchase Requisition items can be added to the cart on both views by clicking on the 'Refer to Buyer' button

Search for Items to Requisition

When a user wants to search for stock items to requisition, the Virtual Catalogue Search application (MSEVRC) can be used. This application searches the Ellipse catalogue for the criteria entered by the user and returns all match stock items. The results show all warehouses in all districts the user has
access to including the stock on hand at each warehouse. An Icon will be displayed on each row of the grid as a visual indicator of stock being available.

Where the Envoy module is installed and configured, if the search criteria match with an external catalogue, these entries are also displayed in the results grid.

MSEVRC has a range of search methods that can be selected. These are:

- Keyword (colloquial)
- Part Number / Mnemonic
- Stock Code
- Product Service Category

Once the user has identified the item to requisition, the item can be added to the shopping cart by selecting the row in the grid then clicking on the 'Add to Cart' button on the bottom of the results grid.

When selections are made in external catalogues, those items are added to the Shopping Cart as purchase requisition items.

Where the search of the catalogue has been exhausted, and the user has still not found the item required, a purchase requisition item can be added by clicking on the 'Refer to Buyer' button on the shopping cart widget, or on the shopping cart checkout screen.

Requisitioning via LinkOne

A view of the LinkOne library will be integrated into Ellipse 8.1. The user will be able to select parts and then have those parts added to the shopping cart for requisitioning at a later time.
Graphical Representation

How it Works

The user navigates to the required page within the LinkOne parts book.

When a part is identified to be requisitioned, the user can either double click on a part in the parts list adding it to the shopping cart or, using the check box, select multiple parts in the parts list and then click on the ‘Add to Cart’ button on the bottom of the parts list to add all selected items into the cart. When adding items into the cart, the Part Number and Supplier will be resolved into an Ellipse Stock Code where possible.

If the part is in the Ellipse catalogue, a list of stock codes matching the part number will be displayed. The user will then need to select the stock code that matches their requirement.

Once the resolve has been completed, the user can choose to add the part to the Ellipse shopping cart. When adding the part to the shopping cart, if it has been resolved to a stock code, the part will be added to the cart using the stock code and will be added to the warehouse requisition item. If the part could not be resolved, the part will be added to the shopping cart as purchase requisition item.
The user can repeat the process as many times as required. Once complete, the user can choose to check out the shopping cart by selecting 'Checkout' on the shopping cart window, or continue with other Ellipse processes and check out later.

Requisitioning via APLs

Application Parts Lists (APLs) contain a list of stocked and non-stocked items. MSE130 is the application that is used to maintain APLs. Enhanced functionality on this application will be provided for the user to add part or all of an APL into the shopping cart for requisitioning.

The APL tree is displayed on the left pane of the screen and shows the hierarchy of APLs (depending on how they are defined). The user will have the ability to right click on an item on the tree and from the menu, either add that item to the shopping cart, or search for that item via the Virtual Catalogue. Adding to the shopping cart will add the contents of the APL (and sub APLs) to the shopping cart, and Search Virtual Catalogue will flow the user to MSEVRC with the particular item to search, and initiate the search.
Graphical Representation

How it Works

The user identifies an APL that is needed for requisitioning.

Where the user selects a node item (APL or Sub-APL) they will only have the ability to add the item to the shopping cart. If this action is selected, all the items on the APL will be added to the shopping cart and the quantity defaulted to the value stored in the quantity required field. Where an APL has sub APLs, each item on the sub APL will also be added to the shopping cart.

Where the user selects a leaf item (stock code or non-catalogued item, they will have the ability to search for that item via the Virtual Catalogue (MSEVRC) and then (as required) add to the shopping cart, or to add the item directly to the shopping cart. When adding the item to the shopping cart, the value in the quantity required field will be defaulted into the shopping cart quantity field. Items marked as 'Purchase' items will be added to the cart as purchase requisition items.
Once items are added to the shopping cart, the quantities can be changed if different from the defaulted value.

**Requisitioning via Work Orders**

Refer to work order documentation for details of requisitioning from Work Order applications.

In general, requisitioning from a work order can be completed either by 'Auto Requisitioning' based on the material requirements entered on the work order task, or via the action that will flow the user to the Warehouse Requisition application (MSO140).

For Auto Requisitions, items on the Material Requirements tab are either populated by a Standard Job, or are entered manually by the user. Once all requirements have been entered and confirmed, clicking the Auto Requisition button will create a warehouse requisition for all items on the list.

When adhoc requisitions are required, these can be created by taking the Requisition flow from the Action menu. This process will pass into MSO140 the costing details from the work order.

Requisitioning an APL can be completed by using the Requisition flow from the Action menu, or the APL can be added to the shopping cart by using the 'Add to Cart' button on the Work Order Task APL tab. Using the 'Add to Cart' button will add the contents of the APL into the Shopping Cart.

A new Action is introduced in Ellipse 8.1 to update the costing details on the Shopping Cart with the details on the work order. To update the Shopping Cart costing, select the 'Add Cost Details to Cart' action that is available from all work order applications.
Purchase Requisitions

Purchase Requisition items are items that are not identified in the Ellipse catalogue. For these items, the user can choose to create a purchase order directly through the existing Purchase Requisition application MSO14P or MSO230. Alternatively, the user can add a purchase requisition item into the shopping cart that will then be added to a purchase requisition when the shopping cart is checked out.

Refer to existing Ellipse documentation for the use of MSO14P and MSO230.

To add a purchase requisition item to the shopping cart, the user needs to click on the 'Refer to Buyer' button on the either the shopping cart widget view, or on the items grid on the Check Out application (MSEVRC). By clicking this button, the user will be presented with a screen to enter details of the item being requisitioned. Once items are entered and saved, a purchase requisition item is added to the shopping cart.
Check Out Shopping Cart

When the user has completed collecting items for requisitioning, the check out process can begin. The user can go into the check out screen at any time to update header information or items.

The check out screen (MSEEGT) consists of header and item sections. The header contains the fields needed for the creation of the warehouse and purchase requisitions. The Item section contains all the items collected to requisition.

If any field is changed, it must be saved before it can be processed using the submit button. The ‘Process’ action button is used to create the requisitions with the items from the cart. The process will firstly determine what requisitions are needed to be created, then validate the items before creating the requisition headers and then items. When creating purchase requisitions, the processing will, at the end of processing attempt to live the purchase requisition into purchase orders. Purchase orders will only be created if the user has the authority to do so, and there is enough information on the requisition for the purchase order to be created.
Once a shopping cart has been processed, the user has the ability to review the requisitions that were created from the cart using the Review Processed Shopping Cart application (MSEPSH).