



Children's
of Alabama®

Infor Requisition Center

User's Training Manual



Children's of Alabama

infor

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PROCESS & SYSTEM OVERVIEW

A. Types of Requisitions

Within the **Infor Requisition Center**, requesters generally create four types of requisitions.

Requisitions

1. In-Stock: On Children's of Alabama (COA) item master list and located in Central Distribution.

2. Non-Stock: On Children's of Alabama (COA) item master list and not located in Central Distribution.

3. Specials: Not on Children's of Alabama (COA) item master list and not located in Central Distribution inventory.

4. Services: Not on Children's of Alabama (COA) item master list and not an item or product. An act or service performed at COA.

B. Important Changes

COA requesters who previously used PeopleSoft Requisitioning should note the following similarities and differences within the Infor RQC.

From PeopleSoft

To Infor

Item Number

Item Number: No leading 0's.

Item Description

Item Description: Will follow COA/Novation naming standards, improving reporting and sharing data between systems.

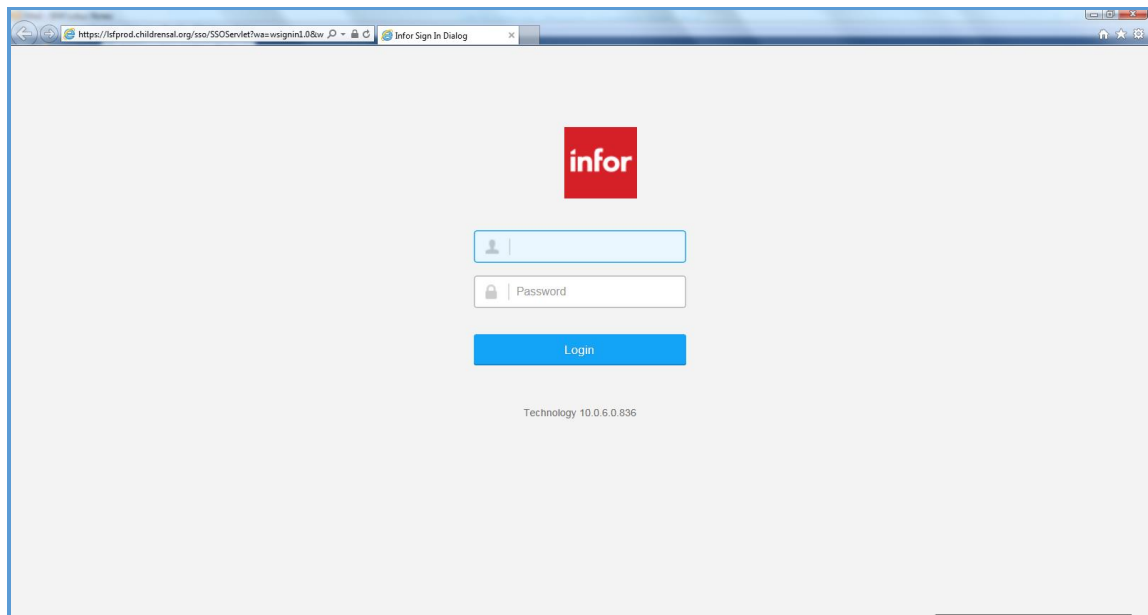
Department Number

Accounting Unit: Supplies will be expensed to the accounting units that use them, improving reporting, planning, and supply chain management.

Expense Code

Account Number: Some expense codes have been consolidated into new Infor expense codes.

C. Logging on to Infor



Steps

Instructions

1. Double-click the **Infor** icon located on the desktop.

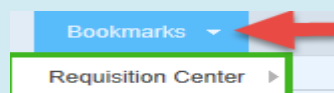


2. Enter your assigned **Infor** user name and password.

3. Click the login button.

4. To access the **Infor Requisition Center**, click the globe icon at the top of the screen.

5. Click the **Bookmarks** drop-down arrow and select **Requisition Center**. (*See next page for how to add a bookmark.)



Your username and password are the same as your email log in credentials. If the User ID and Password fields turn yellow, you entered the wrong password.

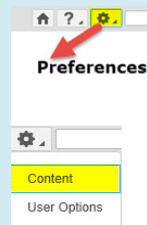
D. How to Add a Bookmark to Navigation

Bookmarks are content items (forms, reports, etc.) that your system administrator has given you access to. Having access to a bookmark is called a subscription. Items identified with a closed book icon are top-level bookmarks. Top-level bookmarks have subordinate content associated with them. A closed book means you can click to expand and see subordinate bookmarks. A multi-page open book means the bookmark is already expanded. An open book identifies a subordinate bookmark.

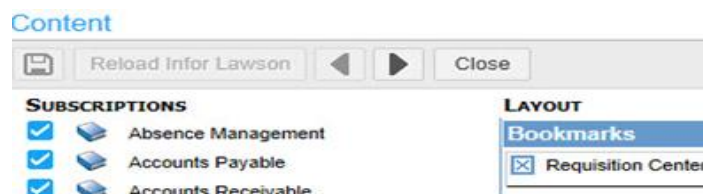
You will need to add **Requisition Center** as a bookmark the first time you log into Infor.

Steps Instructions

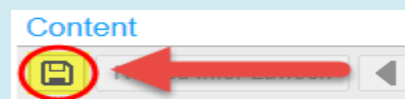
1. Click the '**Preferences**' icon and select '**Content**'.



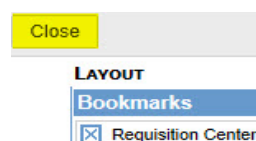
2. Double-click or drag a **Bookmark** (closed book icon) from the subscriptions column on the left to the layout column on the right. It will be added to the navigation and will be available for selection in the **Bookmarks** menu on the main toolbar.



3. Click the '**Disk**' icon to save your Bookmark (s).



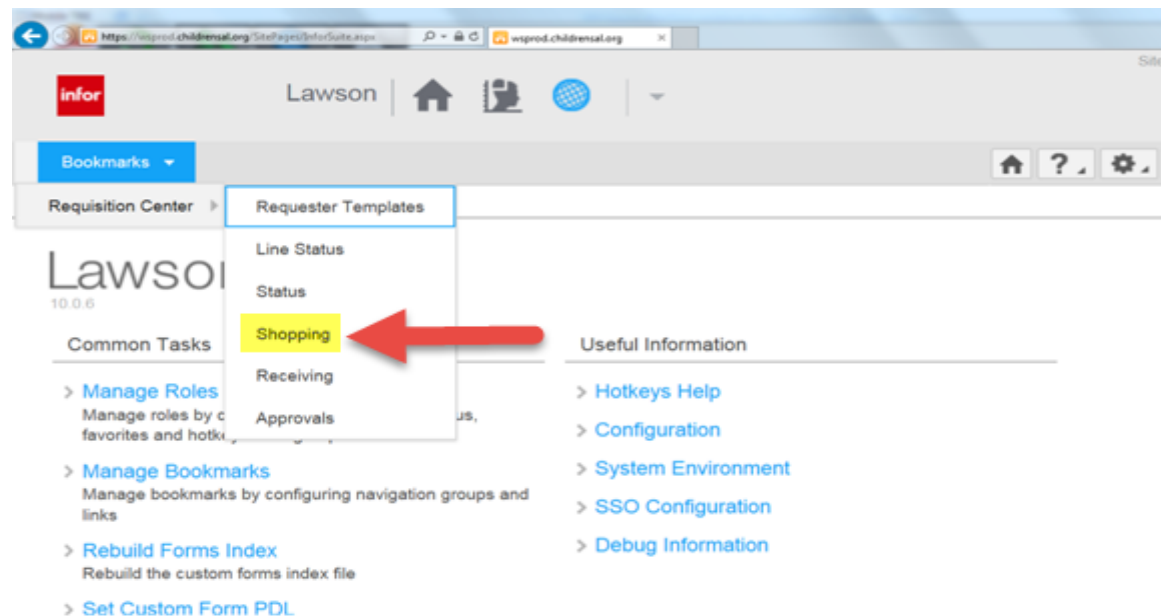
4. Click the '**Close**' button to return to the Infor screen.



E. Opening the Requisition Center

Instructions for Opening the Infor Requisition Center

On the Menu Bar on the left side of the Shopping window, find Shopping under the requisition Center Menu and click to open.



The Requisition Center (RQC) main screen will appear.



If you do not see the pop-up screen above, reconfigure your browser to “allow pop-ups”. Maximize the form by pressing the full screen button on the top right of the pop-up window.

ORDERING IN-STOCK ITEMS

A. Creating a Requisition for In-Stock Items

The “**new**” button allows you to order in-stock items from Central Distribution.

The screenshot displays a web application interface for creating a requisition. At the top, there are tabs: 'Find / Shop', 'Inquire', and 'Profile'. Below these are sub-tabs: 'Basic' (selected), 'Detail Profile', 'Accounting', 'User Fields', and 'Comments'. The 'Basic' tab contains several fields: 'Requester' (with a blacked-out value), 'Requisition', 'Creation Date', and 'Requisition Status'. Below these is a horizontal line. Under the line are fields for 'Reference Number', 'Requisition Description', 'Requesting Company' (0010 CHILDREN'S HOSPITAL OF ALAB), 'Requesting Location', 'Requested Delivery Date' (with a calendar icon and 'mm/dd/yyyy' format), 'Priority' (Normal), 'Deliver To', and 'Commodity Code'. To the right of these fields is a 'Requisition Lines' section with a table header: 'Item', 'Quantity', and 'Cost'. The table currently shows '-- No Items --'. At the bottom right, there are summary statistics: 'Total Quantity: 0', 'Total Cost: 0.00 USD', and 'Number of Lines: 0'. Below these statistics is a row of buttons: 'New' (highlighted with a yellow border), 'Cancel', and 'Save'. A red arrow points to the 'New' button.

Find / Shop ▾ Inquire Profile

Basic Detail Profile Accounting User Fields Comments

Requester [REDACTED]

Requisition

Creation Date

Requisition Status

Reference Number

Requisition Description

Requesting Company 0010 CHILDREN'S HOSPITAL OF ALAB

Requesting Location

Requested Delivery Date mm/dd/yyyy

Priority Normal ▾

Deliver To

Commodity Code

Requisition Lines

Item	Quantity	Cost
-- No Items --		

Total Quantity: 0

Total Cost: 0.00 USD

Number of Lines: 0

New Cancel Save

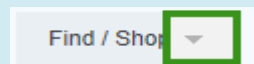
Steps	Instructions
-------	--------------

1.	Click New button.
----	--------------------------

2.	Enter a Requesting Location .
----	--------------------------------------

**If you order items for one location this field will automatically populate.*

3.	Click Find Shop drop down menu.
----	--



4.	Click Template .
----	-------------------------

You will have the option to select **Company**, **Location**, or **Requester Templates**.

**Company Templates are for items from Central Distribution and Location Templates are department specific and are for ordering of items directly from the Vendor. Requestor Templates are requestor-specific.*

**For In-Stock items select Company Templates.*

5.	Select your desired template.
----	-------------------------------

**You will see multiple company templates for various categories. If you do not see an item click the "Next" button to see the "Next" page of items within a template. You can also search for the item by entering numeric or descriptive information in the search field.*

6.	A results list will display. Click the item number.
----	---

7.	Enter the quantity.
----	---------------------

8.	Click the (+) icon to add the item to the requisition.
----	--



Company Templates provide the ONLY way to order supplies from COA Central Distribution. If any other template or shopping option is chosen, the desired item will be ordered from a vendor. It will, therefore take longer for delivery than an available item ordered from Central Distribution.

B. Entering Comments

Comments should be used to provide specific information regarding the items being purchased. Comments will be seen by the Approvers, Buyers, and Receivers.



For any line in a requisition that is a patient chargeable item to be used in the care of a specific patient, you must document the **Patient Name (First and Last)**, **MRN**, and **Visit ID** in an appropriate comment field for that line of the requisition. When the requested item is delivered to the requesting location, this information will be used to identify the correct patient. It will also be used to enter appropriate charges in iConnect for patient chargeable items.

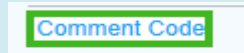
Listed below are the different types of comment codes.

Steps Instructions

1. Click the **More** drop down menu.

2. Select **Line Comments**.

3. Click **Comment Code**.



From the list of codes, the user will click the **PAT SPECIFIC-STOCK/CENT** link.

For patient chargeable items you must select the appropriate comment code based on the type of requisition and the following COA business rules.

Requisition Type	Comment Code
In-Stock	PAT SPECIFIC STOCK/CENT
Non-Stock	PAT SPECIFIC-SPECIAL/NONSTOCK
Special	PAT SPECIFIC-SPECIAL/NONSTOCK

4. In the Line Comment frame, enter the following:

- **Patient Name (First and Last)**
- **MRN**
- **Visit ID**

****Avoid the use of special characters, especially "&", which can be misinterpreted by Infor.***

5. Click the **Change** button (top left of the screen) to save your comment for the requisition line.

***If you do not click the change button after entering a comment, the comment will not be saved.**

6. Click the **Release** button.



After clicking Release a dialog box will appear indicating that your requisition has been successfully released.

ORDERING NON-STOCK ITEMS

Non-Stock requisitions are created when a user needs to order items that are on COA's Item Master list, but not stocked in central distribution.

Steps

Instructions

1.	Click the Find/Shop drop-down arrow.
2.	From the Find/Shop drop-down list, select Template .
3.	Click the Location Templates hyperlink.
4.	To find your item on the list, scroll down the list of items on the template.
5.	Enter the quantity or number of units of the item you want to order. Then click the (+) icon.
6.	<p>If you need to add additional items to the requisition, you will repeat the steps above, selecting Template, Search Catalog, or Express Order from the Find/Shop drop-down list.</p> <p>*See Appendix for additional ways to search for your item(s).</p>
7.	From the Requisition Lines , Click Item Number .
8.	<p>Repeat steps 1-5 on page 11.</p> <p>*For Non-Stock items select comment code PAT SPECIFIC-SPECIAL/NONSTOCK.</p>
9.	Click the Release button.





After clicking Release a dialog box will appear indicating that your requisition has been successfully released. Since items in a Non-Stock requisition are from the COA Item Master, approval of the requisition will be automatic.

ORDERING SPECIAL/SERVICE ITEMS

Special/Service Items are not stocked in Central Distribution and not included on the COA Item Master.

Steps Instructions

1. Click the **Find/Shop** drop-down arrow and select **Special/Service**.
2. Enter the item you want to request. The following fields are REQUIRED for **Special Items** (these fields are marked with a red asterisk in the system):
 - ***Item** - It's best if you have the Vendor's or the Manufacturer's Item Number available.
 - ***Description**: The Item Description box lets you type up to 30 characters of free-format text, but it is ok to either type in, or cut and paste, longer item descriptions. Item description text over 30 automatically appears as a purchase order comment, along with the item description.
 - ***Quantity**: Enter the Quantity you wish to purchase.
 - ***Unit of Measure (UOM)**: Enter the Unit of Measure that will be received from the Vendor or
Click the **UOM** lookup button. 
 - ***Cost**: Enter the cost of the item.
 - ***Account**: Enter an account value based on the requesting number or type of item being ordered. Click the account lookup button. 
3. Click the **Add button** to add the item to the being added to the requisition.
4. Click the Profile tab.
5. Click Comments Tab and **Select Comments** to Print on Requisition radio button.
*See page 26 of this manual.
6. Save the comment by clicking the **Update** button. **If the item is to be used in the care of a patient, from Requisition Lines click Item Number. Repeat steps 1-5 on page 11.*
7. Click the **Release** button. **After clicking release a dialog box will appear indicating that your requisition has been successfully released.*

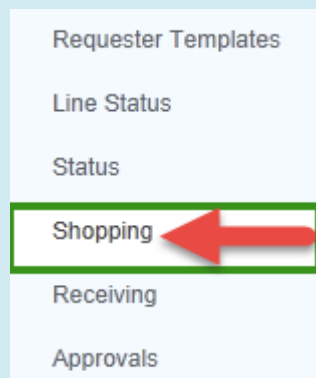
WORKING WITH REQUISITIONS

A. How to Find a Requisition

This procedure outlines the necessary steps to find an existing requisition.

Steps	Instructions
-------	--------------

- | | |
|----|---|
| 1. | Start at the Requester Templates menu and click shopping. |
|----|---|



- | | |
|----|------------------------|
| 2. | Click Inquire . |
|----|------------------------|

- | | |
|----|--|
| 3. | Click the magnifying glass to search for the requisition. |
|----|--|

***A list of requisitions will appear.**

B. Infor Requisition Center – “Status” Overview

The status of a requisition can vary in the system based on the workflow for the various types of requisitions.

Requisition Center - Windows Internet Explorer provided by Children's of Alabama

RQC Requisition: 360









Find / Shop ▾ Inquire Profile

Requisition Inquiry Line Inquiry

☒ Requisition Number ☐ Description ☐ Reference Number ☐ Requestin

☒ Unreleased ☒ Needs Approval ☒ Rejected ☒ Processed ☒ Closed

Previous Next

Action	Requisition	Requesting Location	Value	Priority	Delivery Date	Status	Creation Da
 	360	6103N	200.20 USD 0			Unreleased	08/07/2015
 	359	6103N	200.20 USD 0			Unreleased	08/07/2015
 	349	6103N	2758.07 USD 0			Processed	08/06/2015
 	348	6103N	1536.35 USD 0			Processed	08/06/2015

Below are the possible Requisition Statuses:

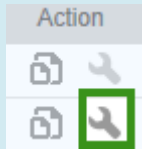
1. **Unreleased:** The requisition needs to be modified or released. Unreleased is the only status you can modify and delete.
2. **Needs Approval:** This status will display if the requisition wasn't approved.
3. **Rejected:** This status will appear if it isn't approved by the approver.
4. **Processed:** This status will appear after all approvals are received.
5. **Closed:** This status will appear after the order is shipped. If an item is coming from a vendor, all items must be received before you can close the requisition.

C. How to Check Approval Status

Steps	Instructions
1.	Go to Requisition Status in the RQC application. The requisitions will appear based on the criteria that is entered.
2.	Hover over the icon at the right end of the requisition and view the approval path details.

D. Modifying a Requisition

This procedure outlines the necessary steps to modify an existing requisition.

Steps	Instructions
1.	<p>Click the wrench icon in the action column.</p> <p>*When modifying a requisition, the requisition must have a status of unreleased.</p> 
2.	The requisition lines will appear. Click the requisition number .
3.	Manually enter the modified quantity.
4.	Click the change button .
5.	<p>Click Print.</p> <p>*Only if you need to print. If not, proceed to step 6.</p>
6.	Click Release .



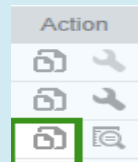
After clicking Release a dialog box will appear indicating that your requisition has been successfully released.

E. Copying a Requisition

This procedure outlines the necessary steps to copy an existing requisition.

Steps	Instructions
1.	Click the Copy icon in the action column.
2.	Click the Check All button.
3.	Click Copy . A new requisition is created with all the information from the original requisition. * If the requisition you are copying contains an item for a specific patient, you must review the Comments section and enter in the correct patient information.
4.	Click Print . *Only if you need to print. If not, proceed to step 5.
5.	Click Release .

1. Click the **Copy** icon in the action column.



2. Click the **Check All** button.



3. Click **Copy**. A new requisition is created with all the information from the original requisition.
- * If the requisition you are copying contains an item for a specific patient, you must review the Comments section and enter in the correct patient information.

4. Click **Print**.
*Only if you need to print. If not, proceed to step 5.

5. Click **Release**.



After clicking Release a dialog box will appear indicating that your requisition has been successfully released.

FAQ'S/WHAT IF'S

Question: How do I add a new item to Infor?

Answer: How many times will you re-order this item in the next 6 months? If the answer to the question above is "None", enter the item as a special item. If you will be ordering this item more than once in the next 6 months, then this item should likely be added to the Infor Item Master as a non-stock item. Please contact the Supply Chain Information Manager to have this item entered into the Infor Item Master prior to adding your requisition.

Send an email to purchasing.requests@childrensal.org and provide the following information:

- a. Vendor Name
- b. Vendor Item #
- c. Vendor Item Description, UOM & Price
- d. Vendor website url
- e. Vendor Contact/Rep. Name (if known)

Question: What if I can't find the item that I need to order, what should I do?

Answer: See Appendix A How to Search the Catalog.

Question: Can "Shopping Lists" help me find Infor item numbers?

Answer: Yes! Taking the time to create a personal "Shopping List" for yourself, using the "Requester Templates" function can greatly reduce the time you spend searching for items in the future. If you receive an error message indicating "you are not authorized to purchase this item," it means that you have not been given permission to order that particular class of item.



Do not substitute the item you want for a similar item. Please contact the Purchasing team via email (purchasing.requests@childrensal.org).

Question: What should I do if the cost for my item is displayed incorrectly?

Answer: If the item you are entering has been previously ordered by Purchasing, the price will automatically default onto your order. An item without a cost entered can be checked out but you will receive an error message and have to correct it. If you do not receive a default cost, manually enter it. If you do not know the correct price, but you have access to the vendor's website (i.e. Grainger), enter the price from the website. Purchasing will verify and adjust all prices before placing the order.

If you cannot find any cost for the item, please contact the Purchasing team via email (purchasing.requests@childrensal.org) and you will receive the correct price for your order.



Do not submit a requisition with the incorrect estimate. This may result in your requisition being rejected. If this happens you will have to resubmit with the accurate price.

Question: How do I speed the processing of an urgent order?

Answer: You can try to expedite routing by informing your requisition approver that the requisition is awaiting approval. Approvers will receive a requisition approval email but a reminder from you will inform them that your requisition requires special handling.



Purchase Orders are usually issued by Purchasing within three days of receipt of the approved requisition. If required sooner, ask your supervisor to contact Purchasing regarding emergency requisition processing.

Question: How can I find out if my requisition is being processed?

Answer: You will see a 'popup notification in Infor upon RQC checkout along with your order number and you will receive an email notification from the system, upon approval.

Question: Where do I get the correct account numbers?

Answer: Ask your manager/supervisor to provide you with a list of the correct account numbers to use to order various types of goods and services. This information is also available on the COA intranet (Red Wagon).

Question: Does it matter how I split up my requisitions?

Answer: Please place Special or Service items on a separate requisition due to the required approval process. Otherwise, requisitions will process correctly regardless of how items are split across requisitions. You can also place items for multiple vendors on the same order. You can place any item you want on a Requisition. The system will automatically create PO's for the correct vendors after your order is approved.

Question: How do I add a comment for a Patient Specific Supply?

Answer: See page 24 of this manual.

Question: How do I add a comment for a Special Item to notate the vendor for the item?

Answer: See page 24 of this manual.

Question: How do I check the approval status of a requisition?

Answer: See page 15 of this manual.

Question: How do I check a requisition to see if a PO Number has been assigned?

Answer: See page 25 of this manual.

APPENDIX

A. How to Search the Catalog

Steps	Instructions
-------	--------------

- | | |
|----|--|
| 1. | Go to Find/Shop and Click Search Catalog . This function allows you to search the Infor Master for inventoried, non-stock, and vendor agreement special items. |
|----|--|

Special Items are not available at this time.

- | | |
|----|--|
| 2. | Search for an item, by typing one of the following: |
|----|--|

- Infor Item Number
- Vendor's Item Number
- Manufacturer's Item Number
- Key Word(s) from Item Description.

A search can be as specific as entering an Infor item number, or as generic as a specific measurement you might find in a description field. The Search field lets you search for a specific item. You enter a string of characters and the application looks for an exact match to what you entered.

B. Entering Items on Your Order in Shopping

Shopping consists of four basic steps.

Steps	Instructions
-------	--------------

1.	Search for the item(s) you wish to order.
----	---

2.	Add each line item to your requisition.
----	---

3.	Add a Header and/or Line Item Comment to supply Purchasing and all information necessary for processing this order.
----	---

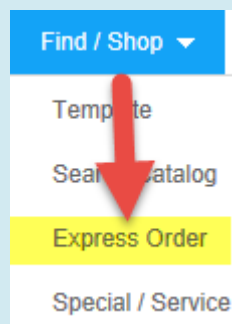
4.	Release the order for approval.
----	--

C. Express Order

The **Express Order** function lets you add a specific item to the requisition. Use this function when you know the exact item that you want to add to the requisition. Express order items are either inventoried or non-stock.

Steps	Instructions
-------	--------------

- | | |
|----|---|
| 1. | Click the Find/Shop drop-down and click Express Order . |
|----|---|



**Express Order was designated for speed entry when you already know the information you want to order.*

- | | |
|----|--|
| 2. | Type or select the items you want to order in the item field and press enter. The Add button is highlighted. |
|----|--|

- | | |
|----|---|
| 3. | Press Enter to add the item or tab forward to the quantity field and type a quantity, shift tab to go back to the Add button and press enter. |
|----|---|

- | | |
|----|---|
| 4. | Click the Release button to remove the requisition to the next processing stage. |
|----|---|



After clicking Release a dialog box will appear indicating that your requisition has been successfully released. Since items included in a Non-Stock requisition are from the COA Item Master, approval of the requisition will be automatic.

D. How to Add a Comment for a Patient Specific Supply

Steps	Instructions
1.	After adding the item to the requisition, click on the item in the cart to open the line detail.
2.	Click the line comments tab.
3.	Select the correct comment code. If the item is coming from Central Distribution (Stock Item) or Purchasing (Non-Stock or special).
4.	Add requested information (Patient name, MRN, Visit ID) and click the change icon to save your comment.

E. How to Add a Comment for a Special Item to notate the Vendor

Steps	Instructions
1.	After adding the item to the requisition, click the item in the cart to open the line detail.
2.	Click the line comments tab.
3.	Select the Print on PO Comment radio button. Add the vendor information in the comment box.
4.	Click the change icon to save your comment.

F. How to Check a Requisition for an Assigned Purchase Order Number

Steps

Instructions

- | | |
|----|--|
| 1. | Go to the Requisition in the RQC application.

*The requisitions will appear based on the criteria that were entered. |
| 2. | Click the notepad icon to see the associated lines. |
| 3. | The vendor and the PO Number assigned will appear for each item on the requisition. |