



Idea Elan

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2018

ANU Technician

How to Manage Purchases

Comprehensive Online Solution for
Lab and Core Facility Management

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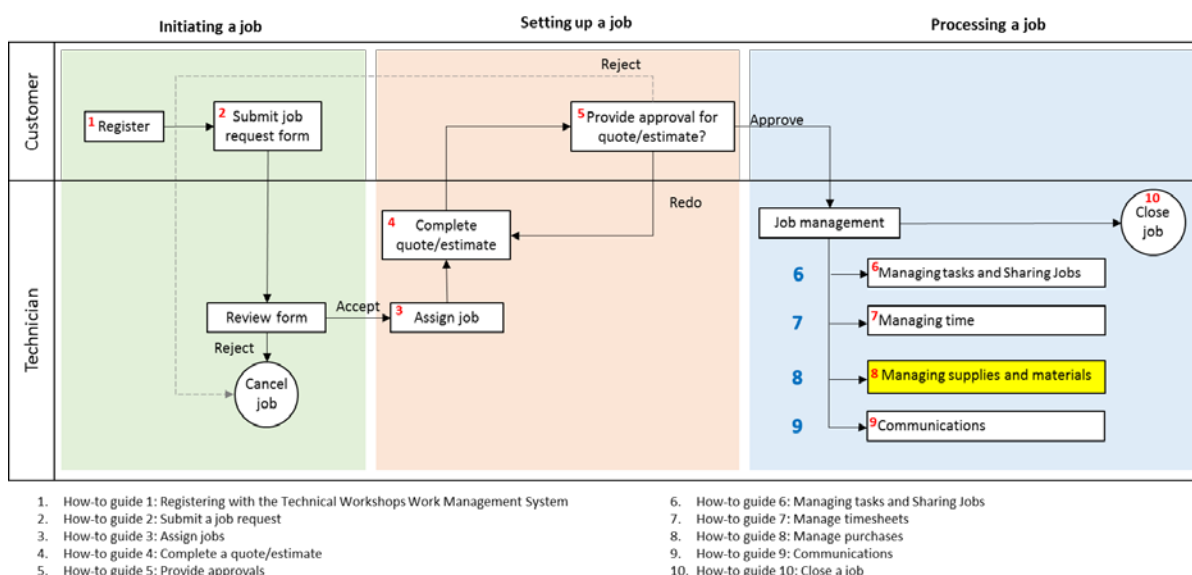
How to Manage Purchases

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how a technician can manage how they record and manage any consumables, materials and supplies used in a job in the Technical Workshops Work Management System. We have produced a series of 'how-to guides' that can be accessed from the System webpage, which can be found here:

<https://services.anu.edu.au/information-technology/software-systems/technical-workshop-work-management-system>

Please see the workflow chart below for more information on the system workflow and the associated 'how-to guide' for each step.

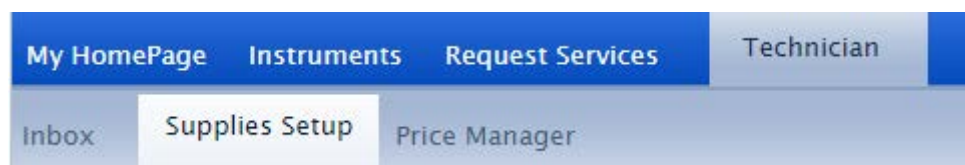


Note: Supplies can be managed from the supplies section as well as within the job.

A. Purchase Orders with external suppliers:

Step A1:

Go to Technician > Supplies Setup.



Step A2:

Purchase orders with external suppliers are managed through two locations: Supplies Setup> Order Supplies; and Supplies Setup> Product Suppliers.

Before creating a Purchase Order, the supplier information will need to be in the system.

Under the Product Supplier section, click “Add New Supplier”

Products Product Suppliers Product Categories Order Supplies							+ ADD NEW SUPPLIER
Supplier Name	Contact Name	Email	Designation	Phone	Home Page	Action(s)	
<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>	<input type="text" value="Search here"/>		
14-D	Paul	Paul@14-D.com	Sales Rep				
Mech_Suppl_125	Mech Suppl 125	mechsuppl125@yahoo.com	Supervisor				
Mech_Suppl_122	Mech Suppl 122	mechsuppl122@yahoo.com	Supervisor				
Mech_Suppl_121	Mech Suppl 121	Mechsuppl@yahoo.com	Supervisor				
Mech_Suppl_120	Mech Suppl	MechSup@yahoo.com	Supervisor				

Step A2:

Enter the supplier information and then click save. The supplier will appear as an option in the ‘Create a new Supplier Order’ section.

INFINITY Create New Supplier
↻ ✕

Supplier Name *

Contact Name *

Designation *

Email *

Website

Address:

City:*

State:

Zip Code:

Country:*

Fax:

Phone:

SAVE
CLOSE

Step A3:

In the 'Order Supplies' tab a table will display all the order that have been placed, or are pending being placed, with external suppliers.

Order Supplies								
Order Number	Order Date	Last Updated Date	Supplier Name	Contact Name	Created By	Last Updated By	Status	Action(s)
+ CREATE NEW SUPPLIER ORDER								
Search h x:	Search here x		Search here x	Search here x	Search here x	Search here x	All	
SMe84	26-11-2018 13:40	26-11-2018 13:40	JB HiF	Mr JB	Rachael Morgan	Rachael Morgan	Unsent	
SMe83	26-11-2018 09:31	26-11-2018 09:31	Tesla	test	Super Admin	Super Admin	Sent	
SMe82	26-11-2018 09:29	26-11-2018 09:29	Tesla	test	Super Admin	Super Admin	Completed	
SMe81	26-11-2018 09:28	26-11-2018 09:28	Dave	Dave	Super Admin	Super Admin	Sent	

- Order Number: Auto generated number for each order
- Order Date: Date of order creation
- Last Updated Date: Date the order was updated last
- Supplier Name
- Contact Name: Supplier contact
- Description: Comments or notes on the order
- Created By: Staff who initiated the ticket
- Last Updated By: Staff who updated the form last.
- Status: Status of Order
 - a. Unsent: The order has not been sent to the supplier. Staff can still add line items to this.
 - b. Sent: The order has been copied and sent to the supplier. The order has not been received.
 - c. Partially Delivered: Some parts have been received.
 - d. Completed: All parts have been received.
 - e. Cancelled: The order was cancelled.

Step A4:

Click "Create New Supplier Order"

Order Supplies								
Order Number	Order Date	Last Updated Date	Supplier Name	Contact Name	Created By	Last Updated By	Status	Action(s)
+ CREATE NEW SUPPLIER ORDER								

Step A5:

Choose a supplier from the dropdown. Their information will automatically appear.

Inbox	Request Forms Setup	Supplies Setup	Price Manager
Supplier*:	Mech Suppl 125		Contact Person: Mech Suppl 125
Name/Address:	161 Victoria Avenue		Website:
Reference:			Email: mechsupsup125@yahoo.com
Order #:			Phone:
Status:			Order Date:
			Date Sent:
			Date Completed:
			Description:

Additionally, a reference number can be added to the order. The reference number could be the account number or any other reference you may have to identify with the external supplier.

Step A6:

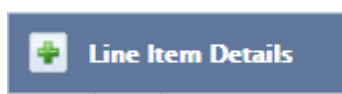
Begin entering product information in the grid.

Seq No.	Part Number*	Description	Units	Qty.	Price	Cost	GST Incl.	Job Id*	Comments	Ordered By	Customer	Delivered?	Charge directly?
1	Enter Part Number	Enter Description	Enter Units	0.00	0.000	0.000	<input type="checkbox"/>	Select		Michael Hill		<input type="checkbox"/>	<input type="checkbox"/>

- Part number: from suppliers' website
- Description: description of the part
- Units: the type of unit e.g. cm, kg. This could also be used if a single item has 10 units of something
- Qty.: number ordered
- Price: price
- Cost: automatically calculated depending on Qty. and Price.
- GST Incl.: Is the GST added in the price?
- Job ID: Select the customer's job that the part is for.
- Comments: Notes.
- Ordered by: Auto-filled by who is adding the part.
- Customer: Auto-filled depending on job ID.
- Delivered: Will be checked after part comes in
- Charge directly: If the customer has been charged elsewhere i.e. through concur, please check this option.

Step A7:

If more lines are needed click the plus sign on the top left of the table.



Step A8:

Click Draft if the order isn't being sent to the supplier straight away so that more items can be added later, by any other staff members. To add more to a previously started order with a status of 'Unsent', click the order number on the Supply Order grid.

Order Number

[SMe84](#)

[SMe83](#)

[SMe82](#)

Click Submit when the purchase is ready to be sent to the supplier.

SUBMIT
DRAFT
CLOSE

Step A9:

To copy the order details to an external supplier website or to an email, open an order and drag the columns to the correct sequence required by the supplier website e.g. Part Number; Qty.; Comments.

Description	Units	Qty.	Price	Cost
jhfsd	Enter Units	0.00	0.000	0.000

Units	Description	Qty.	Price	Cost
Enter Units	jhfsd	0.00	0.000	0.000

Select the column by clicking on the square under each column name.

Click copy at the top right of the grid. The information capture can then be pasted as required.

Line Item Details
COPY

Seq No.	Part Number	Units	Description	Qty.	Price	Cost	GST Incl.	Job Id*	Comments	Ordered By	Customer	Charge directly?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step A10:

A record on the line items can be seen in each job card under Technician> Inbox> Click on the Job> Purchase record and Material.

Purchase Record And Material										
Purchase										
Order Id	Supplier Name	Description	Part #	Quantity	Unit Cost	GST Inc.	Total Cost	Comments	Order By	Delivered?
SMe78	Elements 14	test	g77u7u	5.00	67.000	No	368.500		Miller Hayden	Yes

B. Inventory:

Step B1:

Each workshop can have, and manage, their own inventory. The inventory is managed through two locations: Supplies Setup> Products and Supplies Setup> Product Categories.

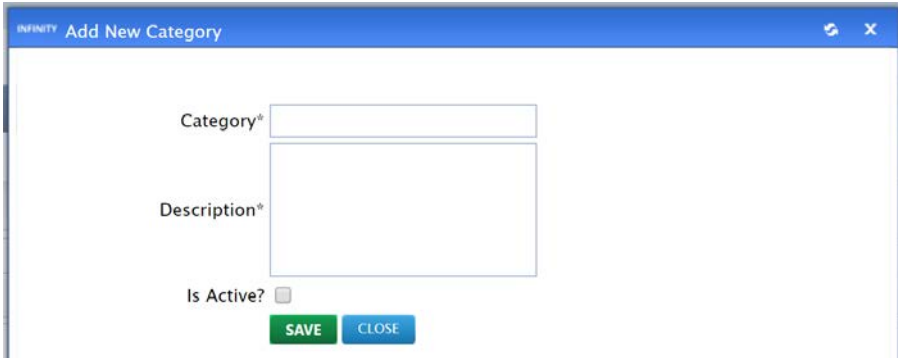
Before creating a Product, the Product Category will need to be in the system. A Product Category is used to manage products by grouping like products under a single category e.g. Wire, Resistors etc.

To manage the inventory go to Technician> Supplies Setup> Product categories and select the 'Add New Category' button:



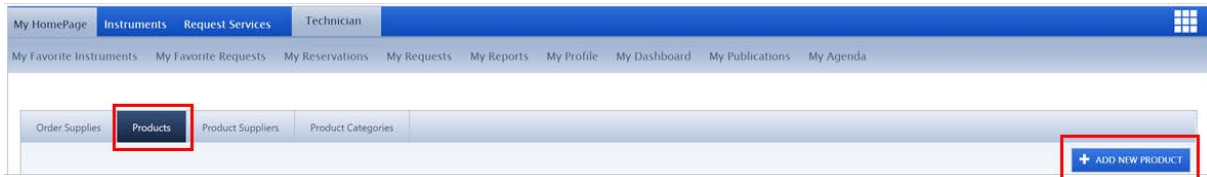
Step B2:

Enter the 'Category' name, 'Description' and tick the 'Is Active' box. Click 'Save'



Step B3:

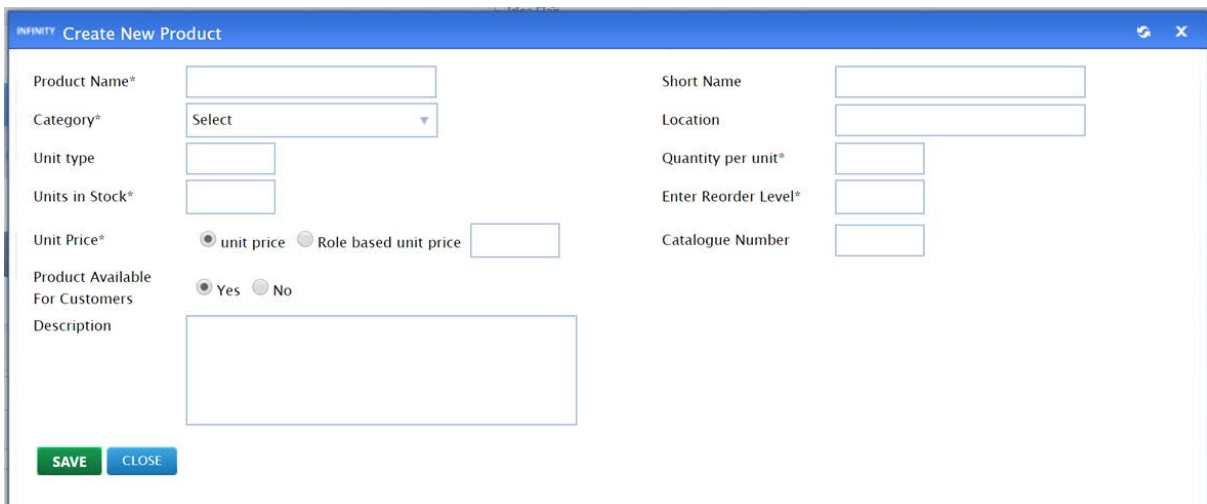
To add products to the inventory, go to Technician> Supplies Setup> Product categories and select the 'Add New Product' button:



Step B4:

Enter the product details, including name, select the relevant category, unit type (e.g. cm, kg etc.) units currently in stock, the quantity used per unit, reorder level, and unit price. Additional information such as short name and location or catalogue number can also be included.

Click the 'Save' button.



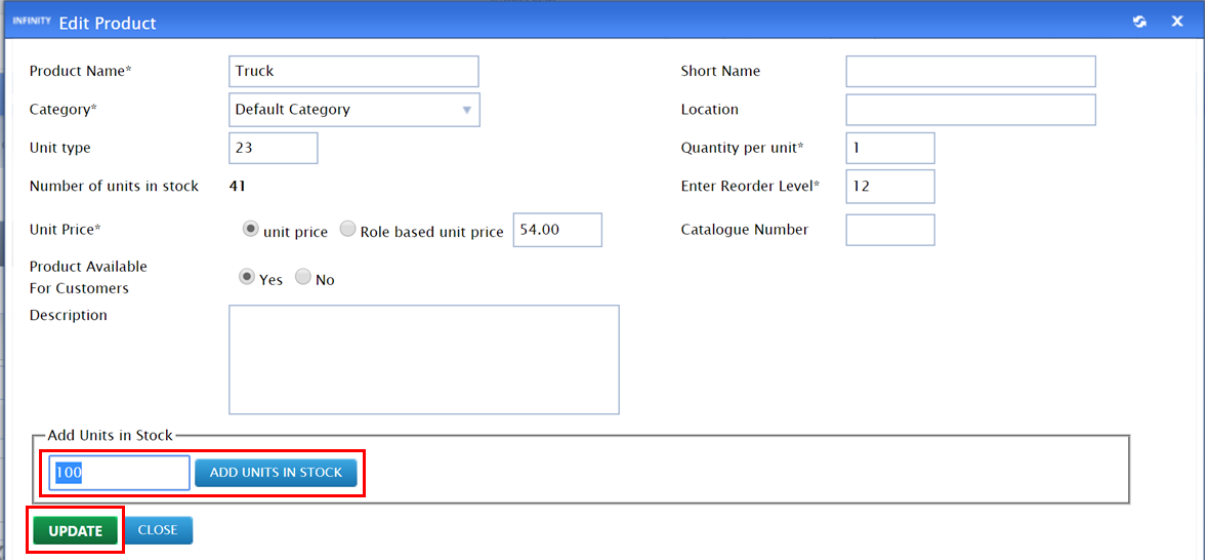
Step B5:

In the 'Products' tab a table will display all the products, the unit price, the number in stock and quantity remaining to help manage inventory levels.

Product Name	Short Name	Category	Catalogue Number	Unit Price	Number In Stock	Number On Order	Quantity Remaining	Reorder Level	Action
Search here X	Search here X	Search here X	Search here X		Search here X	Search here X	Search here X	Search here X	
Plug		Test&Tag		6.00	1000	3	997	1	
T&T Labels		Test&Tag		0.50	1500	12	1488	5	
EU Misc		EU Misc		1.00	10000	10	9990	1	
Fan		Refrigeration Parts		120.00	10	0	10	5	
Diameter 75 Delrin		RSES		100.00	501	2	499	10	
100nF 0402 Capacitor 25V		RSES	200-6333	0.01	9000	6288	2712	100	
Steel drums		RSES		10.00	0	0	0	10	
Aluminium Round Bar 100mm	AL 100 round	Mechanical Parts		130.00	10	0	10	2	

Step B6:

To update the number of units in stock, select the product name from the products table by clicking on the 'Product Name' and entering the number of unit being added in the 'Add Units in Stock' section. Click the 'Add Units in Stock' button and then click the 'Update' button.



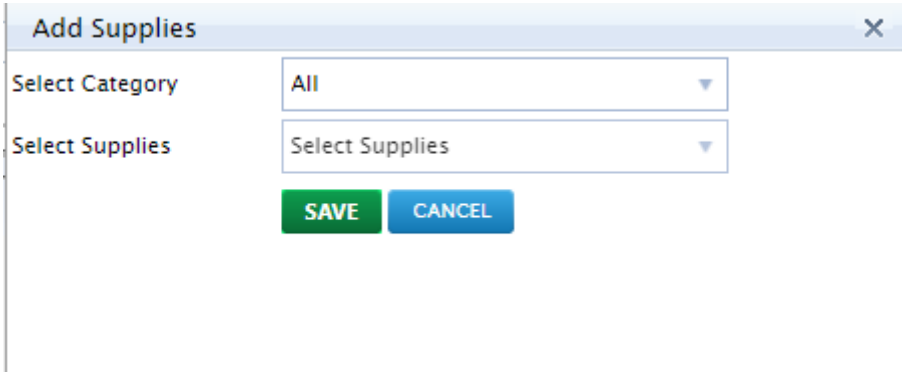
Step B7:

To add the products in the inventory to a job, navigate to Technician> Inbox> Sample Submission/ Service Request and click on the job ID or name. Locate the supplies section and click the 'Add Supplies' button:



Step B8:

Search by category and supplies to find the appropriate product. Check the box next to each product you wish to add.



Add Supplies

Select Category: All

Select Supplies:

- Plug
- T&T Labels
- EU Misc
- Fan
- Diameter 75 Delrin
- 100nF 0402 Cpacitor 25V
- Aluminium Round Bar 100mm

Step B9:

Enter the quantity for each supply from the inventory. Each technician assigned to the form can add additional items.

Supplies

Order (y/n)	Item	Location	Price	Quantity per Unit	Quantity In Stock	Quantity	Total
<input checked="" type="checkbox"/>	Fan		120.00	1	10	5	600.00
<input checked="" type="checkbox"/>	Diameter 75 Delrin		100.00	6	499	10	1000.00
<input checked="" type="checkbox"/>	Aluminium Round Bar 100mm Diameter	RSES	130.00	1	10	6	780.00
Sub Total							2380.00

[ADD SUPPLIES](#)

Step B10:

To ensure that the products are saved to the job, click the 'Update' button at the bottom of the job card.

Details | Communication | Internal Communication | Activity Log | Report | Upload Files

- Job Summary
- Job Details
- Tasks and Status
- Purchase Record And Material
- Amount and Discount

[UPDATE](#) [CLOSE](#)

C. Ad Hoc Costs:

Each workshop can charge customers for impromptu fees.

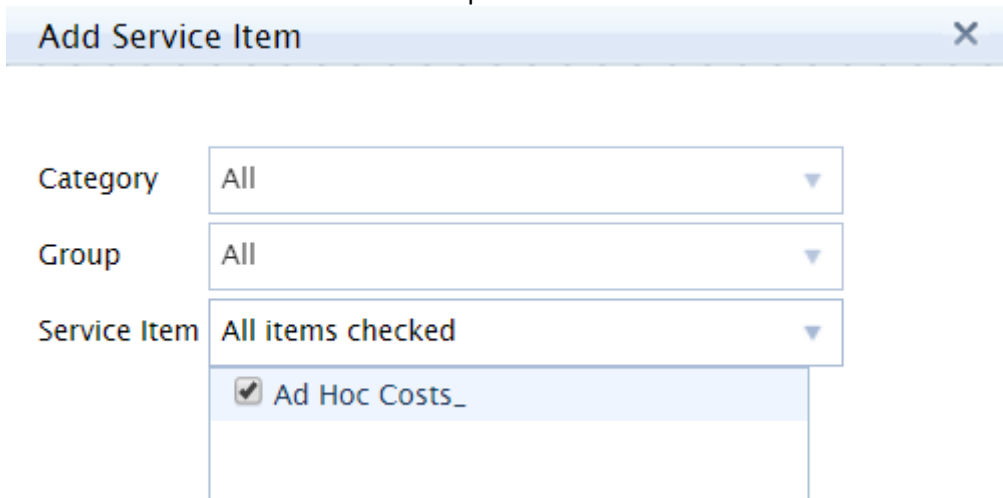
Step C1:

To add ad hoc costs to a job, navigate to Technician> Inbox> Sample Submission/ Service Request and click on the job ID or name. Locate the Service Items section and click the 'Add Service Item' button:



Step C2:

Select Ad Hoc costs from the 'Service Item' dropdown and click Save.



Step C3:

Fill in the fields. Cost per unit and quantity will be used to automatically calculate the total cost. The total cost will add to the 'Sub Total'.



Step C4:

To add more ad hoc costs. Enter a number in the 'Add more items, enter number of rows to add:' and click 'Go'. Adding at the top will give the total number of rows to start with. Adding at the bottom will add more to the current order.

Enter number of rows to start with:

Description	Cost Per Unit	Quantity	Upload	Total Cost
<input type="text" value="Wire"/> <input type="button" value="X"/>	<input type="text" value="1.00"/>	<input type="text" value="10.00"/>	<input type="button" value="SELECT FILE"/>	<input type="text" value="10.00"/>
<input type="text"/> <input type="button" value="X"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="SELECT FILE"/>	<input type="text" value="0.00"/>
<input type="text"/> <input type="button" value="X"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="SELECT FILE"/>	<input type="text" value="0.00"/>

Export to Export to Export to Upload Excel:

The red X next to each line will remove the line item.

Step C5:

To ensure that the Ad Hoc costs are saved to the job, click the 'Update' button at the bottom of the job card.

Details | Communication | Internal Communication | Activity Log | Report | Upload Files

Job Summary	<input type="button" value="Pencil"/>
Job Details	<input type="button" value="Pencil"/>
Tasks and Status	<input type="button" value="Pencil"/>
Purchase Record And Material	<input type="button" value="Pencil"/>
Amount and Discount	<input type="button" value="Pencil"/>