

Part 3.1: Inventory Functions – Requisition & PO

Calem Enterprise Training

Summer 2024

Austin, Texas



What are the goals – REQ

CalemEAM

Goals

I know how to set up REQ roles

I know how to set up users and supervisors

I know how to set up vendor and items supplied

I know how to create requisitions

I know how to create repair requisitions

I know how to approve requisition and create POs

What are the goals – PO

CalemEAM

Goals

I know how to set up PO roles

I know how to create a PO

I know how to add REQ items to PO

I know how to approve a PO

I know how to send repair PO for off-site repair

I know how to receive repair PO

I know how to set up PO terms and conditions to print on PO

Inventory and
Warehouse

Requisition and
Purchase Order

Doc, Project,
Integration, etc.

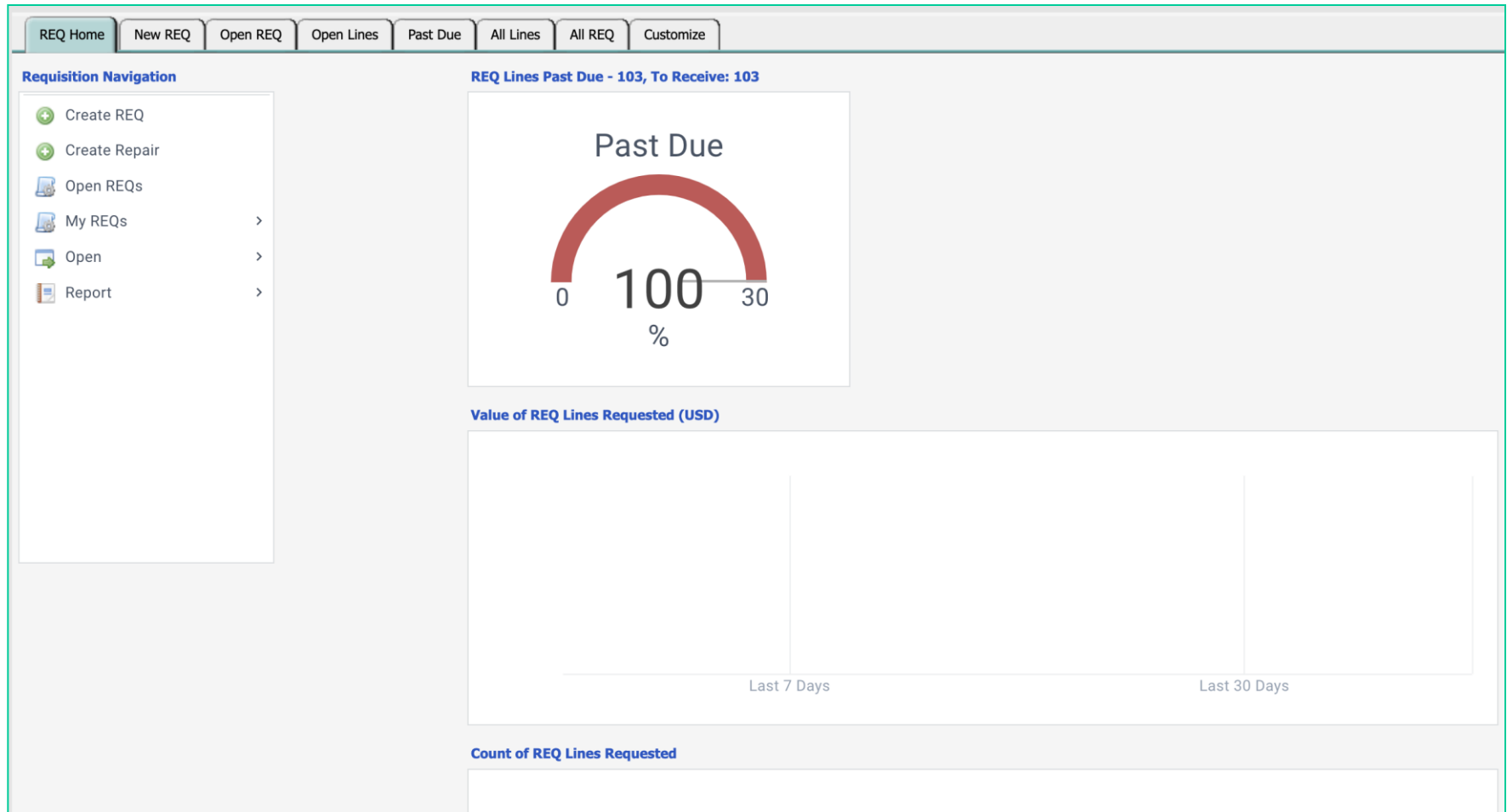
Product Overview – Functions

CalemEAM



Product – Requisition

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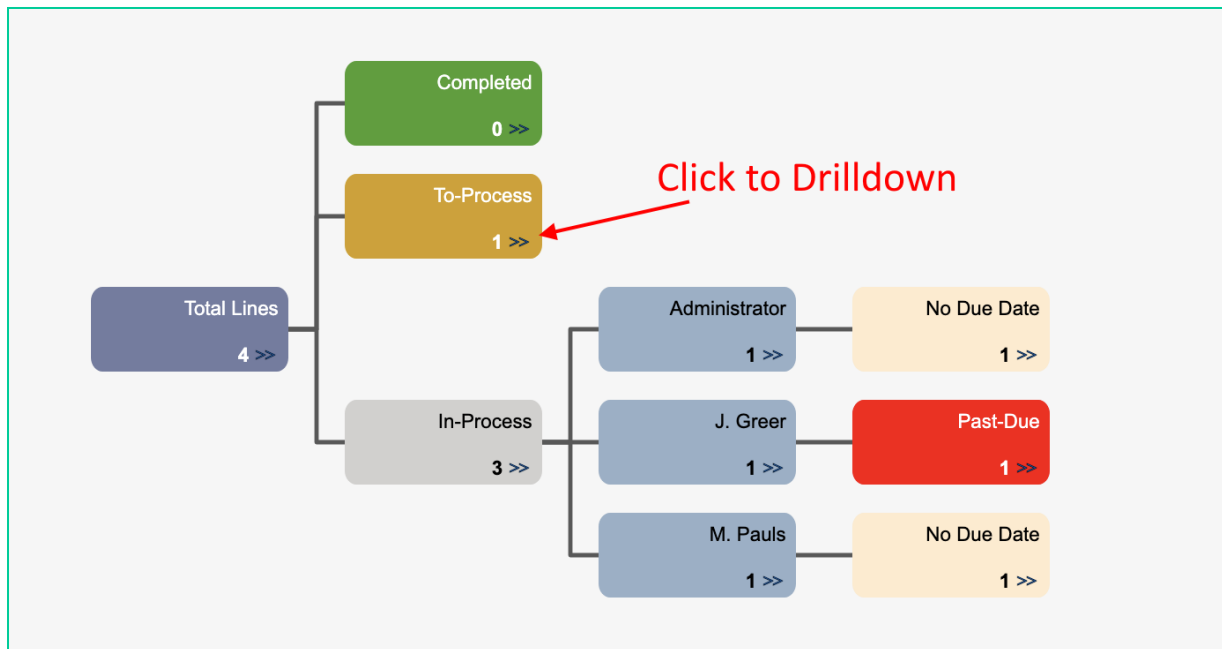


Product – Requisition

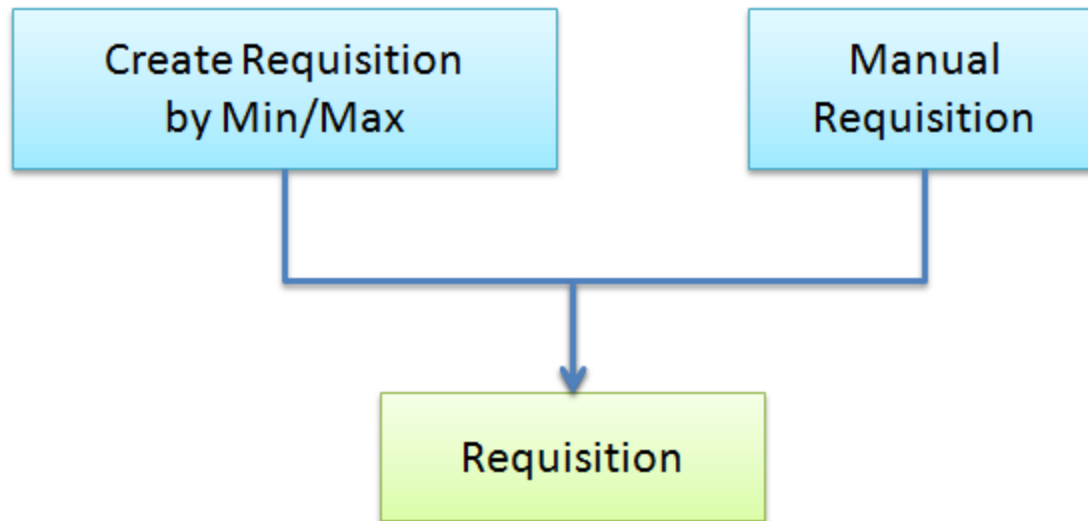
CalemEAM

- Use requisition for spares replenishment

My REQs								
New Open Delete Refresh Cancel Print Customize Search Clear search Status log Customize Tasks								
Req no.	Status	Req on PO	Received	Due date	Time requested	Description	Wo no.	Site
RQ000490	New	None	None	1/20/10	1/20/10 7:57 PM	SATURN-PROD.2007		MySite
RQ000489	New	None	None	1/20/10	1/20/10 7:55 PM	POWERTOOL-1000		MySite
RQ000487	New	None	None	1/19/10	1/19/10 4:45 PM	My testing it.		MySite
RQ000427	Completed	All on PO	Exceeded	12/18/09	12/8/09 9:27 AM			MySite
RQ000428	Approved	Partially on PO	Partially	12/18/09	12/8/09 9:34 AM	testing req.		MySite



- Auto-Requisition Generation by Site Inventory Min/Max



Requisition Module - Roles

CalemEAM

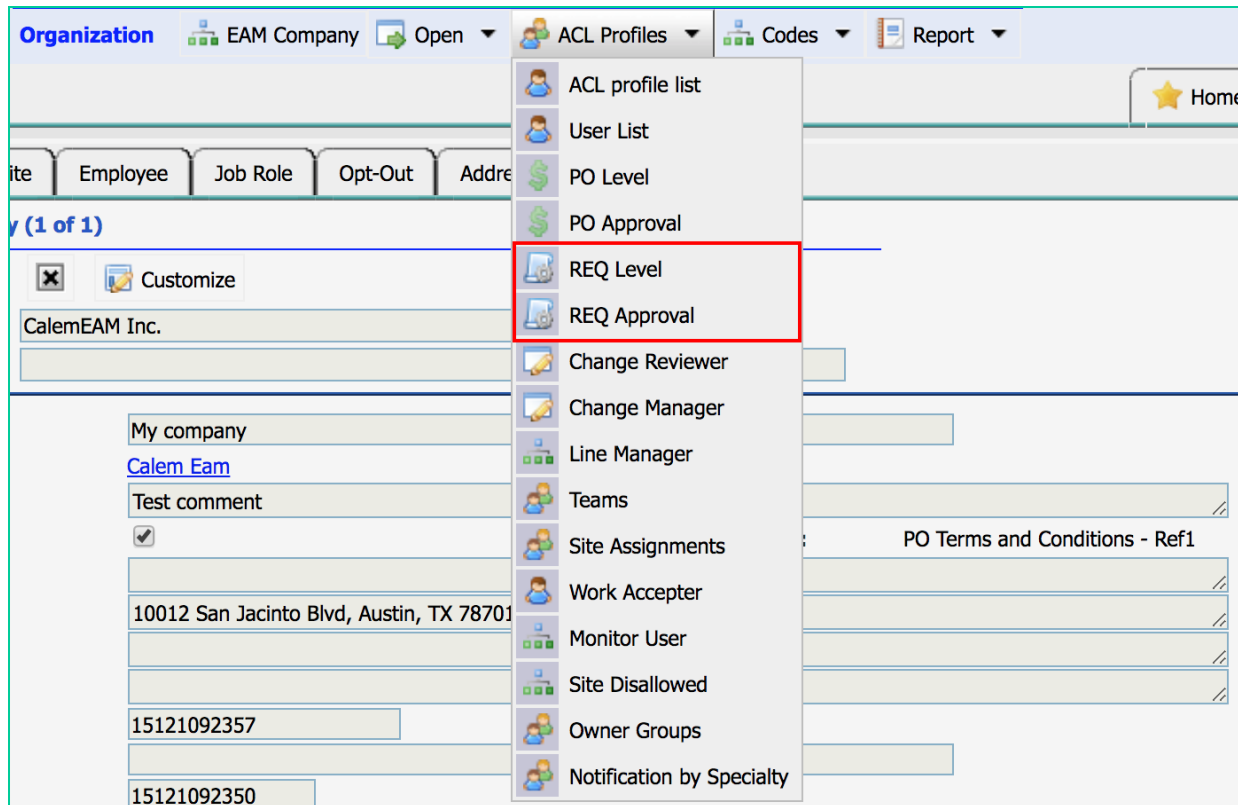
- **REQ Monitors:** users who monitor requisition activities
 - Menu path: Organization | ACL Profiles | Monitor User
- **REQ Approval Teams and Approvers:** users who approve a requisition
- **Requester:** who submit a requisition
- **Pre-approval** is optional

Role	Calem Object	Function
Managers	REQ Approver	Approve REQ
Managers	REQ Monitors	Monitor requisition activities
Requesters	User	Create REQ
Supervisors	REQ Approver	Pre-Approve REQ

REQ Approval Level & Approvers

CalemEAM

- REQ level and approval define how much an approver can approve
 - Menu path: Organization | ACL Profiles | REQ Level | Approval
- Optional:
 - Pre-Approver needs to have an approval level regardless of approval amount.

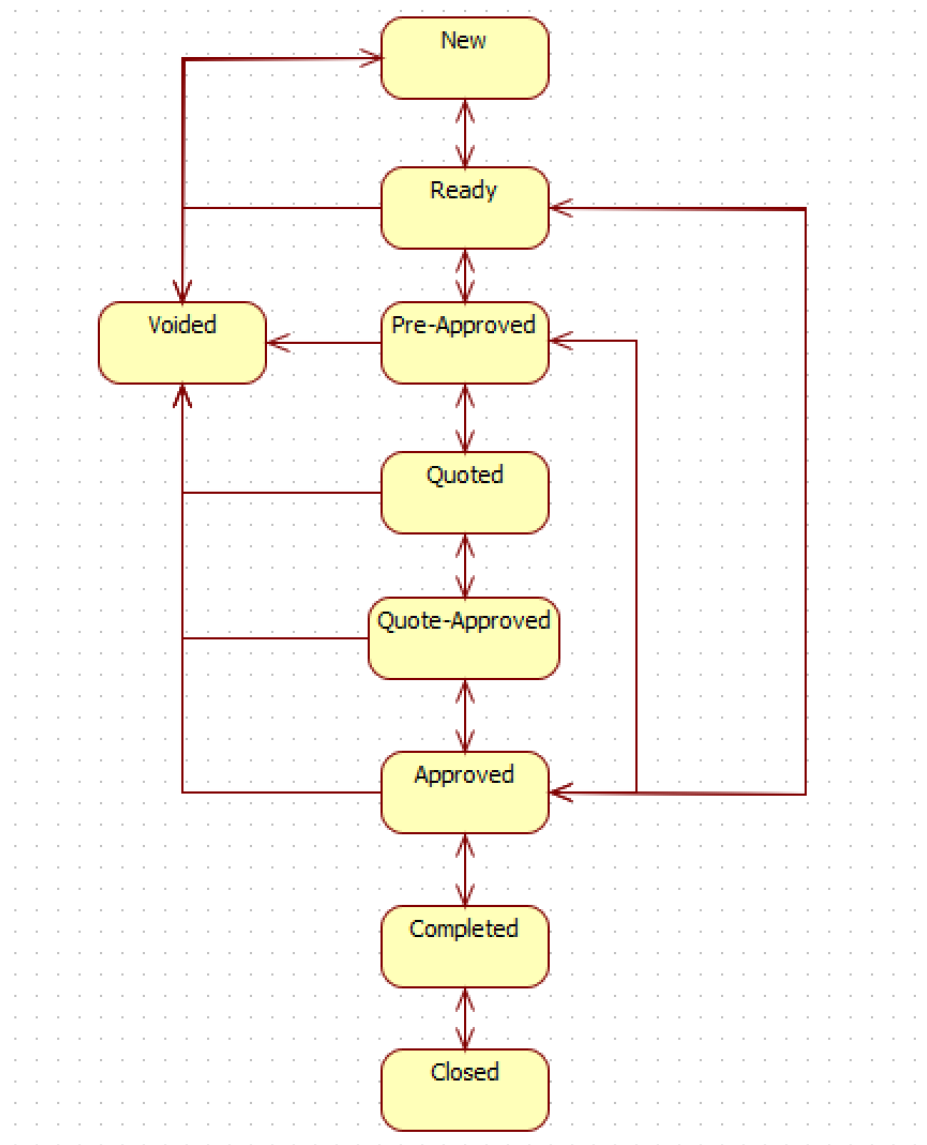


Calem uses supervisor of user record to identify the approver for a requisition.

- See this blog: <http://www.calemeam.com/calemcustomers-2/requisition-approval-routing>
- Supervisor setup:
 - Organization | ACL Profile | User List | click to open a user record, edit user's "Supervisor" field to set a supervisor
- REQ monitors are notified when a REQ approver is not identified

REQ Lifecycle

CalemEAM



Set up vendors and items supplied

- See this blog: <http://www.calemeam.com/calemcustomers-2/vendor-setup-for-inventory>
- Menu path:
 - Vendor: Organization | Open | Vendor
 - Vendor Items: Purchase | Open | Vendor Prices




Requisition – Creation


CalemEAM





- Set “Due date” and “Wo #” if any
- REQ # will be generated by Calem

[My REQs List](#) > Requisition Create

Requisition

 Save  Cancel  Customize

 Value is required: Due date

Priority:	Operation	Source:	Other
Due date:	  	Shipping type:	Ground
Site:	MySite	Time requested:	4/19/16  At: 3:59 PM Central
Requester:	Calem Eam	Asset #:	
Assigned to:		Account:	
Wo #:			
Dept:			
Project:			
Description:	<div></div>		






Requisition – Items

CalemEAM

- Go to Items Tab to add items to the REQ

MainItemsCustomize

Requisition (7 of 21)



ReopenStatus logCustomizeMore

Req #: RQ001060Source: Other

Status: ApprovedState: Open

Priority: Operation

Due date: Sat, 2/19/11

Site: MySite

Requester: Calem Eam

Assigned to:

Assigned by:

Req total (USD): 650.00

Description:

Req on PO: All on PO

Shipping type: Ground

Time requested: Sat, 2/19/11 1:23 PM Central

Time assigned:

Req total (USD): 650.00




Requisition – Add Items


CalemEAM



- Vendor is required by default (option to turn off through configuration)


[Requisition](#) > Req items Create


Req items


 Save  Cancel  Customize

 The field value for the lookup is not valid.: Item

Item:  

Vendor site: 

Qty: 

Uom: 

Note:

Requisition – REQ Total

CalemEAM

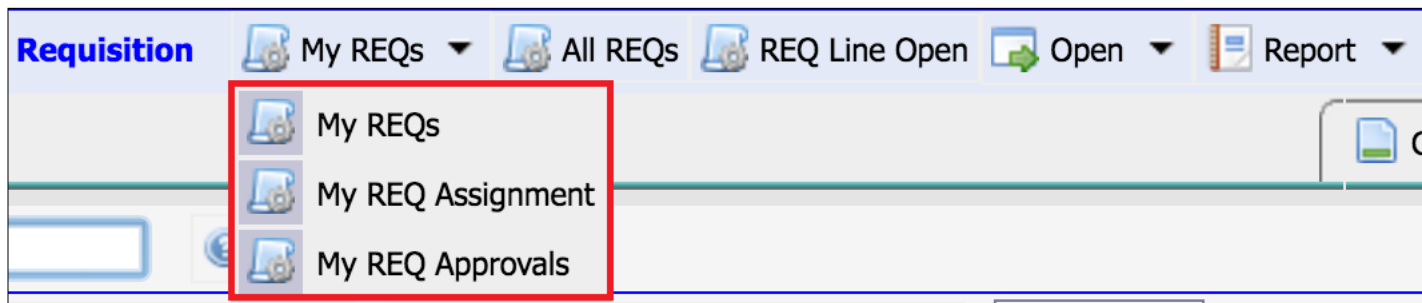
- REQ Total calculated from REQ Lines

Main Items Customize									
Requisition (7 of 21)									
Req #:		RQ001060		Source:		Other			
Status:		Approved		State:		Open			
Req Items (4)									
<input type="checkbox"/>	Item	Vendor site	Qty	PO	PO received	Note	Stock type	Uom	Total (USD)
<input type="checkbox"/>	1000-PUMP-SEAL	Microsoft.Redmont	3	40	Partially	Pump seal 51 diameter	Stock	Box	75.00
<input type="checkbox"/>	Item.Uom_001		5	27	Fully		Stock	KG	500.00
<input type="checkbox"/>	ITM-001	Agilent	2	33	None		Non-stock		0.00
<input type="checkbox"/>	POWERTOOL-1000		3	PO-000003	None	Industrial 1000 series power tools		Qty.EA	75.00

Requisition – My REQ Forms

CalemEAM

- My REQs
- My REQ Assignment
- My REQ Approvals
 - All REQs my approval level can approve



Requisition – REQ Line Forms

CalemEAM

- REQ Line forms show REQ Items
 - Open REQ Lines
 - All REQ Lines
- REQ Approvals
 - Showing all REQs and qualified approvers

REQ Line Open (88)												
Goto REQ [Icons] Customize												
Req #	Status	Item	PO	Note	Unit price (USD)	Qty	Vendor site	REQ site	Requester	PO received	Due date	
JJ-AUS- 1	New	1000-PUMP-SEAL		Pump seal		1		TX_MySite	Administrator		11/9/11	
JJ-AUS- 1	New	DELL-SERVER		My testing		2		TX_MySite	Administrator		11/9/11	
JJ-AUS-00001	New	UOM-test-002			234.00	30	A-VOX Systems	JJ.Austin	Administrator		4/21/16	
JJ-AUS-00002	Pre-approv...	1000-PUMP-SEAL		Pump seal		5		TX_MySite	Administrator		11/10/11	
JJ-AUS-00002	Pre-approv...	DELL-SERVER		My testing		1		TX_MySite	Administrator		11/10/11	
RQ000113	New	1000-PUMP-SEAL		Pump seal	0.00	2		MySite	Administrator		3/16/09	

Requisition – REQ Status Log

CalemEAM

- Req Status Log can be exported

REQ Status Log Edit > REQ Status Log List

REQ Status Log (8)

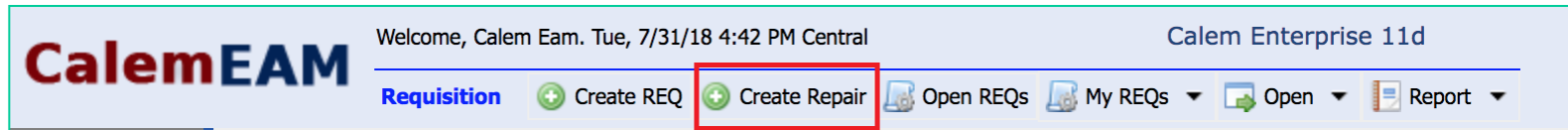
Customize

Req #	From status	To status	Changed by	Time created	Site	Comment
RQ007728	In Process	Completed	Calem Eam	4/12/16 8:00 AM Ce...	MySite	
RQ007728	Approved	In Process	Calem Eam	4/12/16 8:00 AM Ce...	MySite	
RQ007728	Pre-approved	Approved	Calem Eam	4/12/16 8:00 AM Ce...	MySite	
RQ007728	New	Pre-approved	Calem Eam	4/12/16 8:00 AM Ce...	MySite	
RQ005779	Completed	Approved	Administrator	9/2/15 7:10 PM Cent...	MySite_CA	Auto-updated by Calem Enterprise
RQ005779	Approved	Completed	Jack Greener	9/2/15 11:42 AM Ce...	MySite_CA	Auto-updated by Calem Enterprise
RQ007544	New	Approved	Administrator	8/15/15 5:04 PM Cen...	MySite	
RQ007081	New	Approved	Administrator	5/5/15 4:47 PM Cent...	MySite	

Requisition – Off-Site Repair

CalemEAM

- Set up at least one service item in Inventory | Items
- Create Repair Requisition
- Select an asset to repair
- Select a service item to use for the repair






Requisition – Create PO at Approval


CalemEAM

- A PO can be created at requisition approval
- Must have vendor defined at REQ lines or REQ

[Requisition](#) > Status log Create



Status log

 Save  Cancel  Customize

 Ready to save changes.

Create PO: ☐

Comment:

Changed by:  Calem Eam 

From status:

To status:

From state:

To state:

Requisition – Create PO from REQ

CalemEAM

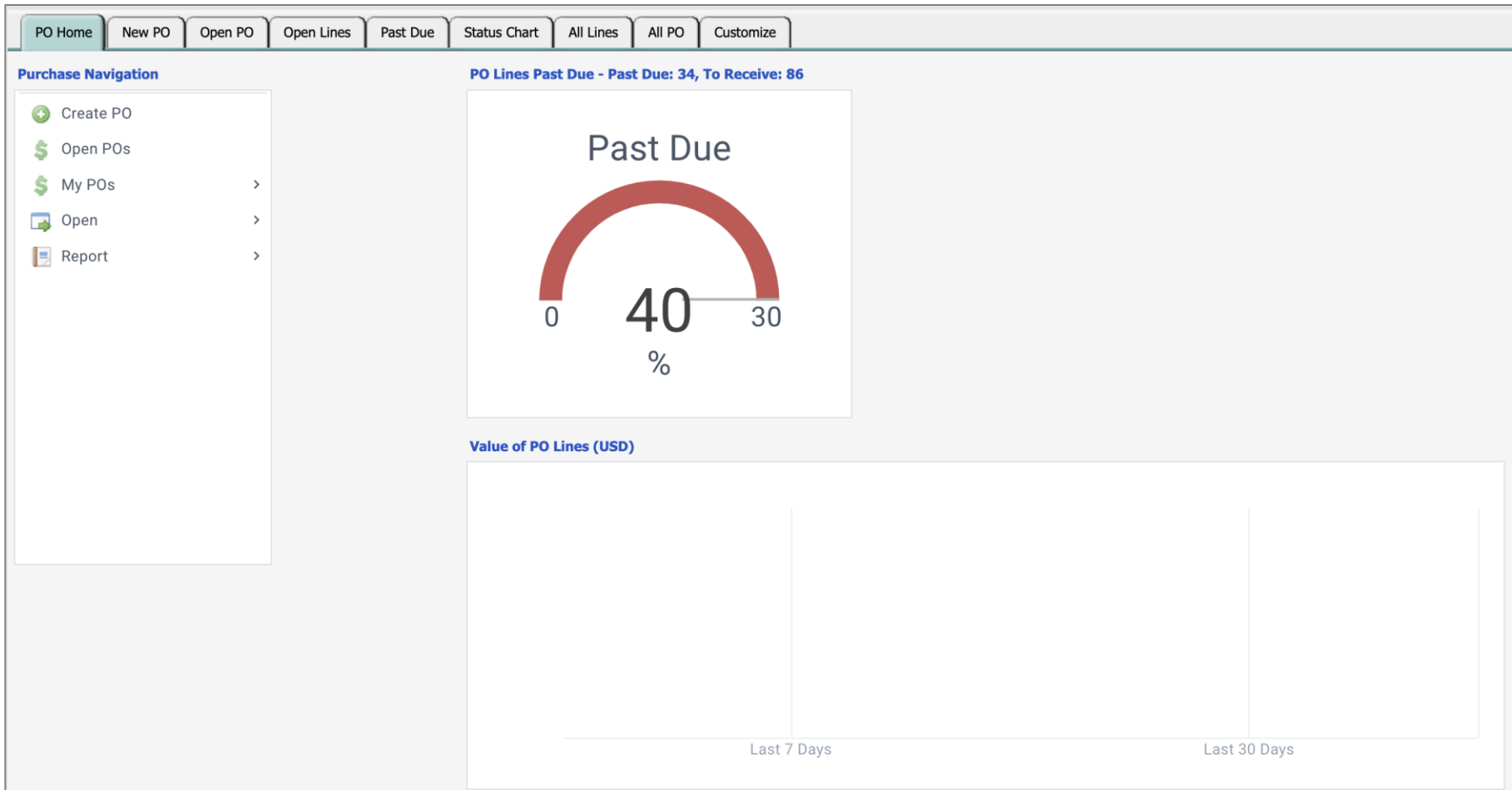
- A PO can be created from REQ
- REQ must be approved

The screenshot displays the 'Requisition (4 of 113)' form in the CalemEAM system. At the top, there are tabs for 'Main', 'Items', 'Document', 'Log', and 'Customize'. Below the tabs, a toolbar contains icons for document actions and a 'Create PO' button, which is highlighted with a red rectangular box. To the right of the 'Create PO' button is a 'More' dropdown menu and a 'Customize' button. The form fields are organized into two columns. The left column includes 'Req #:' (RQ010738), 'Status:' (New), 'Priority:' (Operation), 'Due date:' (Fri, 7/27/18), 'Site:' (SiteA), 'Requester:' (Calem Eam), 'Approver:' (Calem Eam), and 'Assigned to:' (empty). The right column includes 'Source:' (Other), 'State:' (Open), 'Req on PO:' (None), 'PO:' (empty), 'Shipping type:' (Ground), 'Vendor site:' (empty), 'Time requested:' (Fri, 7/27/18 11:17 AM Central), and 'Time assigned:' (empty).

Requisition (4 of 113)	
Req #: RQ010738	Source: Other
Status: New	State: Open
Priority: Operation	Req on PO: None
Due date: Fri, 7/27/18	PO:
Site: SiteA	Shipping type: Ground
Requester: Calem Eam	Vendor site:
Approver: Calem Eam	Time requested: Fri, 7/27/18 11:17 AM Central
Assigned to:	Time assigned:

Hands-On

- Define req Levels and Approvers.
- Assign your login a REQ approval level
- Create a requisition
- Add an item to the REQ
- Approve Requisition
- Create a repair requisition
- Create a PO for the repair requisition



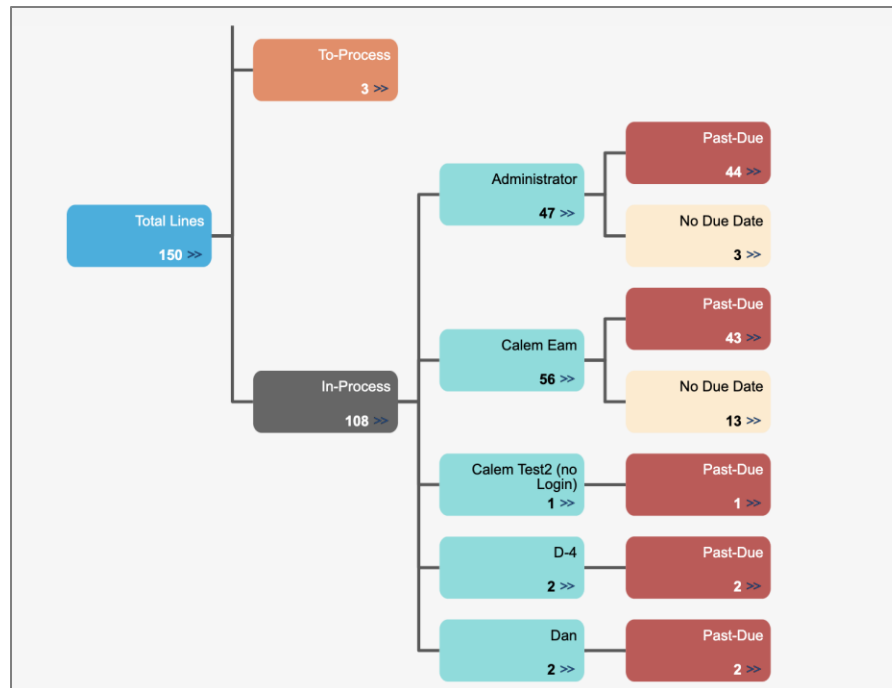
Product – Purchase Module

CalemEAM

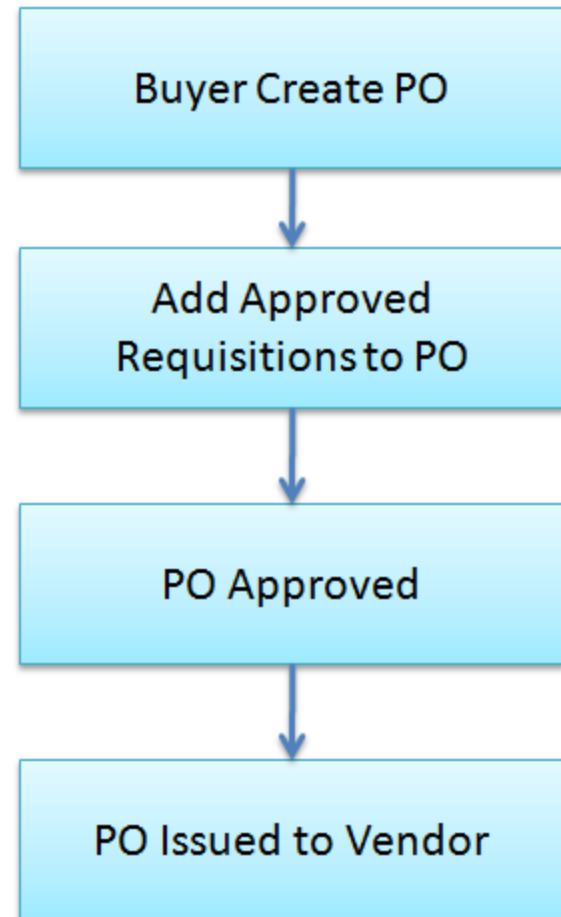
- Use purchase orders to order spares

My POs

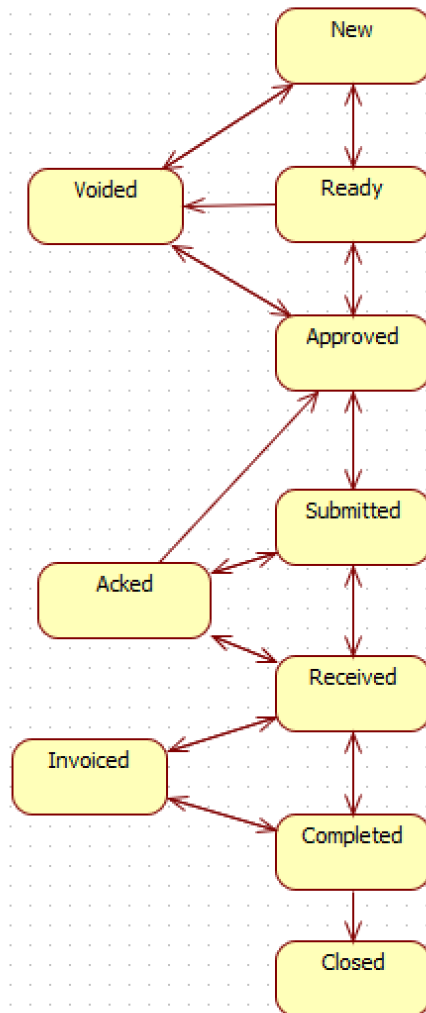
+ New Open X Delete Refresh X Cancel Print Customize Search Clear search Status log Customize Tasks							
PO no.	Status	Received	Buyer	PO date	Vendor site	Vendor note	Site
PO-000001	Completed	Partially	Calem Eam	12/9/09	OfficeMax.Austin	OfficeMax Austin HQ	MySite
23	Completed		Calem Eam	1/19/10	3COM		MySite
21	Completed	Exceeded	Calem Eam	1/17/10	Microsoft.Redmont	Microsoft Redmont	MySite
20	Completed	Fully	Calem Eam	1/17/10	DELL	DELL (Austin)	MySite



- Create Purchase Orders by Buyers
- Add Items from Approved Requisitions
- Tax Rates
- Vendor and Price



PO Status Lifecycle



- Approver – approves PO
- Buyer – executes a PO
- Optional:
 - Pre-Approver: pre-approves a PO before approval

Role	Calem Object	Function
Managers	PO Approver	Approve PO
Buyers	User	Create PO
Supervisors	Pre-Approve	Pre-Approve PO

Purchase Module – Approval

CalemEAM

- Set PO Approval Level Amounts
- Assign PO Approval Level to Users
 - A user can approve a PO by approval level

The screenshot shows the CalemEAM interface for the Purchase Module Approval. The top navigation bar includes 'Organization', 'EAM Company', 'Open', 'ACL Profiles', and 'Codes'. The 'ACL Profiles' dropdown menu is open, displaying a list of options. The 'PO Level' and 'PO Approval' options are highlighted with a red box. The main content area shows a table with columns for 'Employee', 'Job Role', 'Opt-Out', and 'Address'. The table is currently empty, and the 'Customize' button is visible. The bottom section shows the company name 'CalemEAM Inc.' and a link to 'My company'.

Employee	Job Role	Opt-Out	Address
----------	----------	---------	---------




PO Module - Creation


CalemEAM


- Set Vendor to purchase from
- PO # is generated by Calem

[My POs List](#) > Purchase order Create


Purchase order



 Save  Cancel  Customize



 The field value for the lookup is not valid.: Vendor site


Vendor site: 


Buyer

PO date: 

Site:  

Buyer:  

Assigned to: 

Account: 

Cost

Shipping term:

Shipping type:

Payment term:

Payment type:

Comment:

- Off-site repair is tracked by repair REQs and POs
- A repair PO can only be created from a repair REQ
- See blog: <http://www.calemeam.com/calemcustomers-2/asset-off-site-repair-and-tracking>








PO Module – Add PO Item

CalemEAM


- Go to Items tab
- Use “Add item” to add REQ items
- Use “+” to add items without a REQ


MainItemsCustomize

Purchase order (2 of 9)



Reopen

Customize

More ▼


PO: 45


State: Open


Status: New


PO date: Tue, 2/23/16


PO Lines (0)

Add item

Remove item





Customize


<input type="checkbox"/>	Line	Item	Qty	Qty received	Received	Uom	Unit price (USD)	Total (USD)
No results found.								

PO Module – Add PO Item








CalemEAM

- Appoved REQs with matching vendors are shown
- Use “Add others” to add REQs of other vendors

[Purchase order](#) > Req items by PO vendor Lookup



Req items by PO vendor (1)

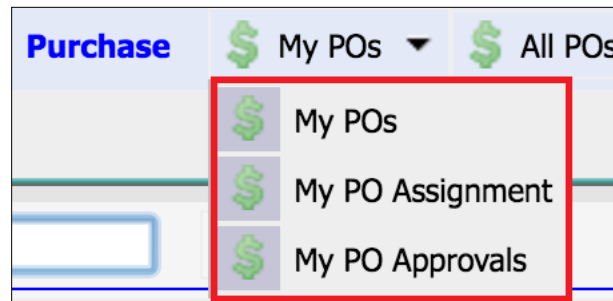
 Select  Cancel  **Add others**     Customize

<input type="checkbox"/>	Req #	Item	Qty	Site	Vendor site	Note
<input type="checkbox"/>	RQ006897	ITM-001	3	MySite	Agilent	

Purchase Module – My PO Forms

CalemEAM

- My POs
- My PO Assignment
- My PO Approvals
 - All Pos my approval level can approve



Purchase Module – PO Line Forms

CalemEAM

- PO Line forms show PO Items
 - Open PO Lines
 - All PO Lines
- PO Approvals
 - Showing all Pos and qualified approvers






PO Lines Open (19)										
<div><input type="text"/></div> <div> Goto PO Customize</div>										
PO	Status	Item	Note	Qty	Qty received	Unit price (USD)	Vendor site	Received	PO date	PO received
41	Submitted	5B0059112	Roll	28	23	32.36	CFT	Partially	12/4/12	Partially
26	Approved	uom-test-003		2				None	3/2/10	
33	Acked	Item.Uom_001		11	8.2	100.00		Partially	2/19/11	Partially
42	Acked	1000-PUMP-SEAL	Pump seal 51 diameter	1	-18	2.50	ADC	Partially	7/10/13	Partially
34	Acked	Item.Uom_001		10	9		3M.CA	Partially	4/12/11	Partially
39	Submitted	ITM-001		2			3M.CA	None	4/3/12	
12	Submitted	100HP-COMPRESS...	Compressor bearing for 100 HP com..	4	3	5.00	3M.CA	Partially	8/9/10	Partially
40	Submitted	1000-PUMP-SEAL	Pump seal 51 diameter	6	2		3M.CA	Partially	7/24/12	Partially


Purchase Module – Tax Code

CalemEAM

- Tax Code
 - Multiple Tax Rates (Federal, Province, etc.)

Tax code (1 of 2)

 Customize

Tax code:  TX009

Tax rate (%): 8.5%

City:

State:

Country:

Note: Testing it.





Last modified: Thu, 5/2/13 3:48 PM Central

Modified by: [Calem Eam](#)

Time created: Sun, 7/25/10 9:39 PM Central

Created by: [Administrator](#)

Tax rate (1)

 Customize

<input type="checkbox"/>	Tax rate (%)	Note
<input type="checkbox"/>	8.5%	Sales tax

PO Cost including item total, tax and freight can be updated at PO by:

- **Inventory | Transactions | Adjust Receiving Cost**
- **Repair POs can be adjusted just like normal PO**

Purchase Module – Vendor Prices

CalemEAM

- Menu path: Purchase | Open | Vendor Prices
- Add items supplied by the vendor

Vendor Price (59)								
Price Log Customize								
<input type="checkbox"/>	Vendor site	Item	Unit price ()	Unit	Lead time (days)	Currency	Site	Note
<input type="checkbox"/>	3M.CA	100HP-COMPRESS...	23.00	Qty.EA			MySite	CA site for 3M
<input type="checkbox"/>	3M.CA	Item.Uom_001	0.234	G			MySite	CA site for 3M

- PO terms and conditions can be configured via a PDF file and included in PO print: <http://www.calemeam.com/calemcustomers-2/purchase-order-print-part-3-terms-and-conditions>

Hands-On

- Define PO Levels
- Assign login user as an approver
- Create a PO
- Add items from approved requisitions
- Approve PO
- Email PO
- Set up Vendor Prices
- Set up Tax Rates

Inventory and
Warehouse

Requisition and
Purchase Order

Doc, Project,
Integration, etc.

**Thank You for Attending
the CalemEAM Training!**
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