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”

**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.
Step A3:

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

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Order Date</th>
<th>Last Updated Date</th>
<th>Supplier Name</th>
<th>Contact Name</th>
<th>Created By</th>
<th>Last Updated By</th>
<th>Status</th>
<th>Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>S001</td>
<td>26-11-2018</td>
<td>13:40</td>
<td>JB HIE</td>
<td>Mr. JB</td>
<td>Rachael Morgan</td>
<td>Rachael Morgan</td>
<td>Unsent</td>
<td></td>
</tr>
<tr>
<td>S002</td>
<td>26-11-2018</td>
<td>09:31</td>
<td>Tesla</td>
<td>test</td>
<td>Super Admin</td>
<td>Super Admin</td>
<td>Sent</td>
<td></td>
</tr>
<tr>
<td>S003</td>
<td>26-11-2018</td>
<td>09:29</td>
<td>Tesla</td>
<td>test</td>
<td>Super Admin</td>
<td>Super Admin</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>S004</td>
<td>26-11-2018</td>
<td>09:28</td>
<td>Dave</td>
<td>Dave</td>
<td>Super Admin</td>
<td>Super Admin</td>
<td>Sent</td>
<td></td>
</tr>
</tbody>
</table>

- 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”
Step A5:

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

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.

- 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.

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

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.

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.
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.

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.
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.

![Image of Edit Product screen with highlighted 'Add Units in Stock' button and '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:

![Image of Job Supplies screen with 'Add Supplies' button highlighted]

Step B8:

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

![Image of Add Supplies screen with 'Select Category' and 'Select Supplies' dropdown menus]


**Step B9:**

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

![Add Supplies](image)

**Step B10:**

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

![Job Summary](image)

**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:

![Add Service Item](image)

Step C2:

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

![Add Service Item](image)

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’.

![Add Service Item](image)

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.

![Add Service Item](image)
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.