

Item Request Module

The Item Request module is used to create item requests to advise those responsible for inventory in your organization, that supplies are needed for your department. This Chapter describes how to use the Web Work, Item Request module.

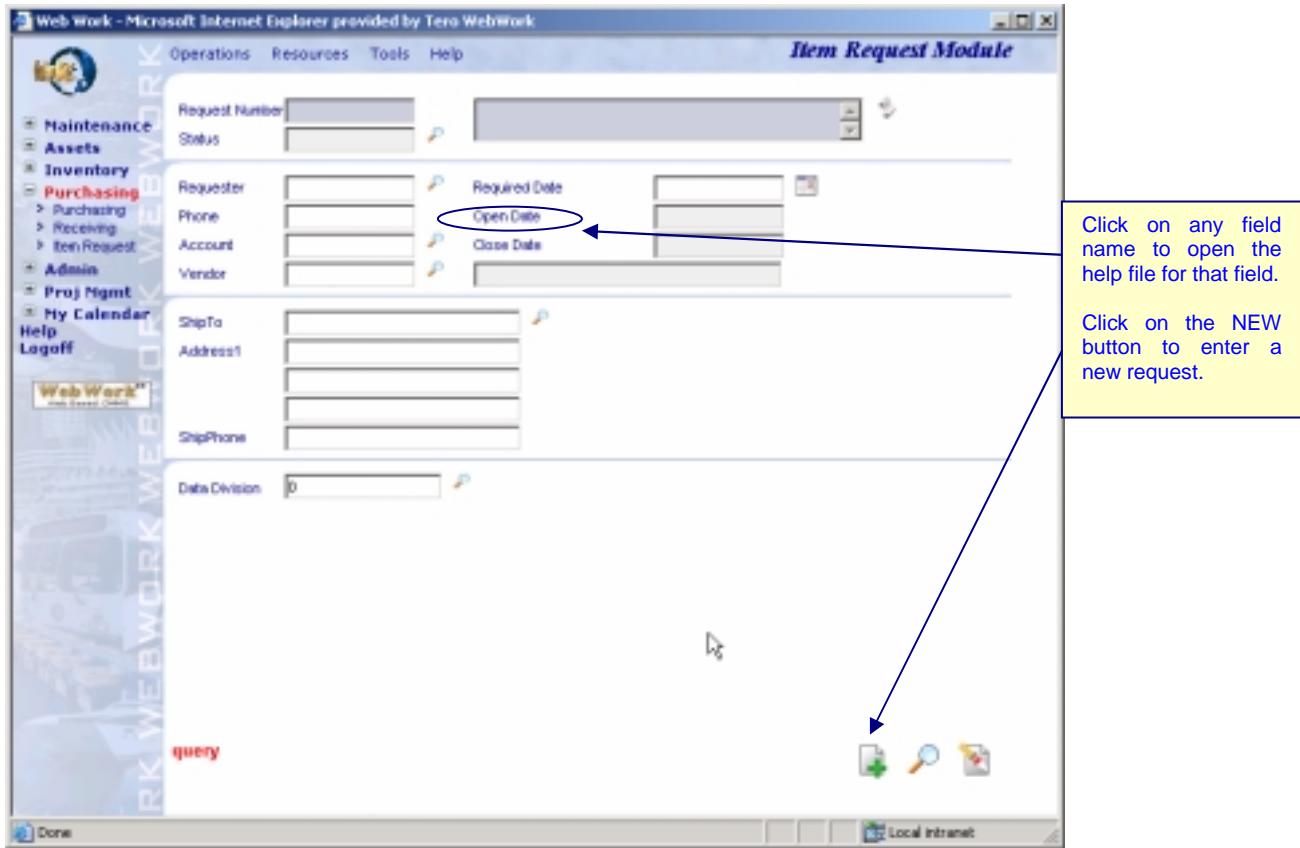
Table of Contents

9.1	OVERVIEW OF THE ITEM REQUEST MODULE.....	2
9.2	CREATING ITEM REQUESTS	3
9.2.1	TO CREATE AN ITEM REQUEST	3
9.2.2	EDITING ITEM REQUESTS.....	4
9.3	CREATING ITEM LISTS	4
9.3.1	ADDING INDIVIDUAL LINE ITEMS TO A REQUEST	4
9.3.2	ADDING REQUEST KITS TO A REQUEST	7
9.3.3	EDITING LINE ITEMS	8
9.3.4	DELETING LINE ITEMS	9
9.4	REQUEST KITS.....	9
9.4.1	CREATING REQUEST KITS.....	9
9.4.2	EDITING REQUEST KITS	11
9.5	CHANGING THE STATUS OF A REQUEST.....	12
9.6	ITEM REQUEST ACCOUNTS	13
9.6.1	TO APPLY ITEM REQUEST COSTS TO MORE THAN ONE ACCOUNT.....	13
9.6.2	ITEM REQUEST STATUS HISTORY	15
9.7	PRINTING ITEM REQUESTS.....	16
9.7.1	PRINTING INDIVIDUAL ITEM REQUESTS	16
9.7.2	PRINTING MULTIPLE ITEM REQUESTS.....	16
9.8	ITEM REQUEST – REPORTS	16
9.8.1	CREATING ITEM REQUEST REPORTS	17
9.8.2	PRINTING ITEM REQUEST REPORTS	17
9.8.3	TO PRINT A REPORT IN THE ITEM REQUEST MODULE:.....	18
9.9	LINKS.....	18

9.1 Overview of the Item Request Module

The Item Requests Module is used to enter new Item Requests into the Web Work system.

- Click on the **Item Request** button on the left hand side of the screen to access the Item Request module.
- When you enter the Item Request module you will be in Query mode as shown in the screen below:



The **Operations**, **Resources**, **Tools** and **Help** drop down menus contain the various features available in the Item Request module.




Web Work includes “help files” for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

9.2 Creating Item Requests

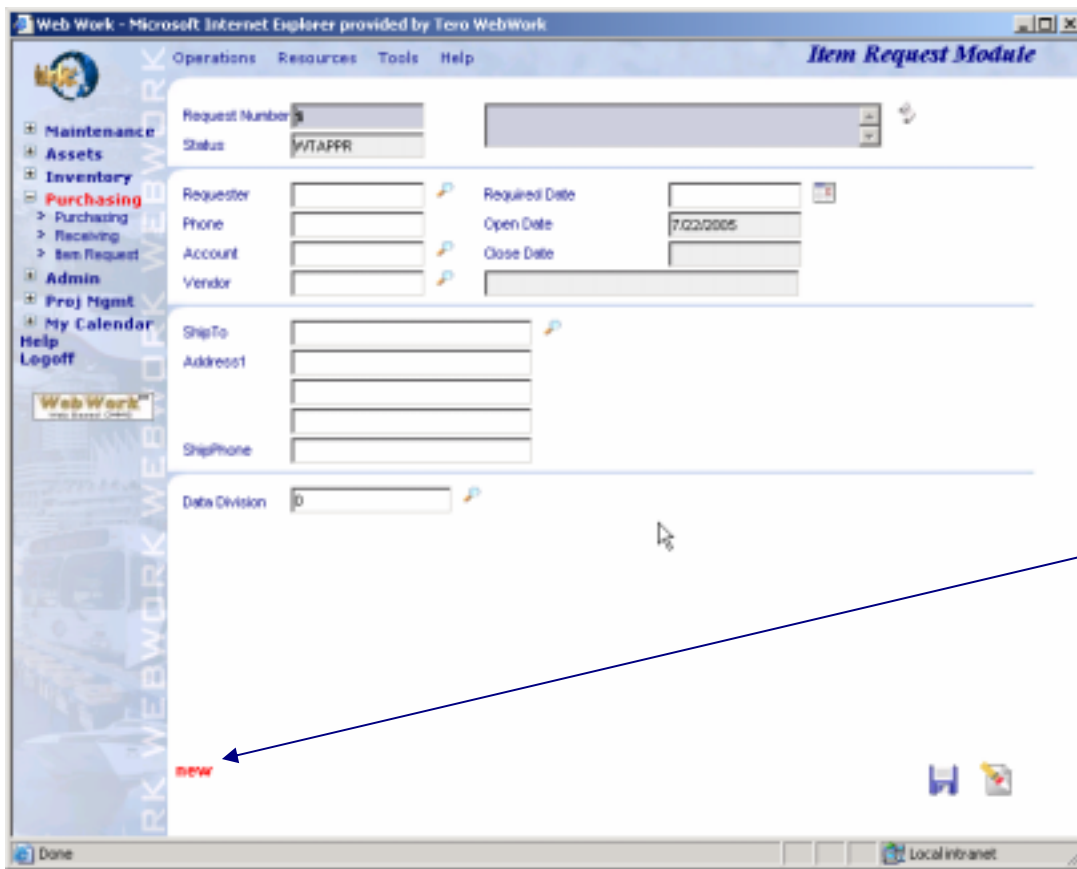
When an item is required, create an item request to advise those who are responsible for inventory and purchasing in your organization that supplies are required.

9.2.1 To Create an Item Request

- Move your mouse over the Operations menu at the top of the screen to display the drop down menu. Select New Request (Auto Number) or New Request from the drop down menu.

- Or click on the  button at the bottom right hand side of the screen.

- The following screen will open:



Web Work - Microsoft Internet Explorer provided by Tero WebWork

Item Request Module

Operations Resources Tools Help

Request Number

Status

Requester Required Date

Phone Open Date

Account Close Date

Vendor

ShipTo

Address

ShipPhone

Data Division


new

Done Local intranet

Notice the mode you are in changed from query to new.

- The Request #, Status and Open Date will be populated by the Web Work system.
- Enter information into the fields displayed on the screen. For information on field contents click on any field label – this will open a popup help window for that field name.

NOTE: The Request #, Description and Open Date fields are the only required fields, all other fields are optional.


- Click on the  button at the bottom right hand side of the screen to save the Item Request.
- You will then be in edit mode where you can edit and resave the Item Request, print the Item Request, create a new item request or move to other work.

9.2.2 Editing Item Requests

- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- When you retrieve the item request you will be in edit mode.



Only New Item Requests can be edited. Item Requests that have been approved, closed, cancelled etc. cannot be edited.

- Make the necessary changes to the Item Request.
- Click on the  button at the bottom right hand side of the screen to save the Item Request.



To change the status of a request click on the OPERATIONS menu and select Change Status from the drop down menu.

9.3 **Creating Item Lists**

When you have created an item request, you can add a list of items to that request using the Item List feature. You can enter individual line items or you can request a predefined list of items called kits.

9.3.1 Adding individual line items to a Request

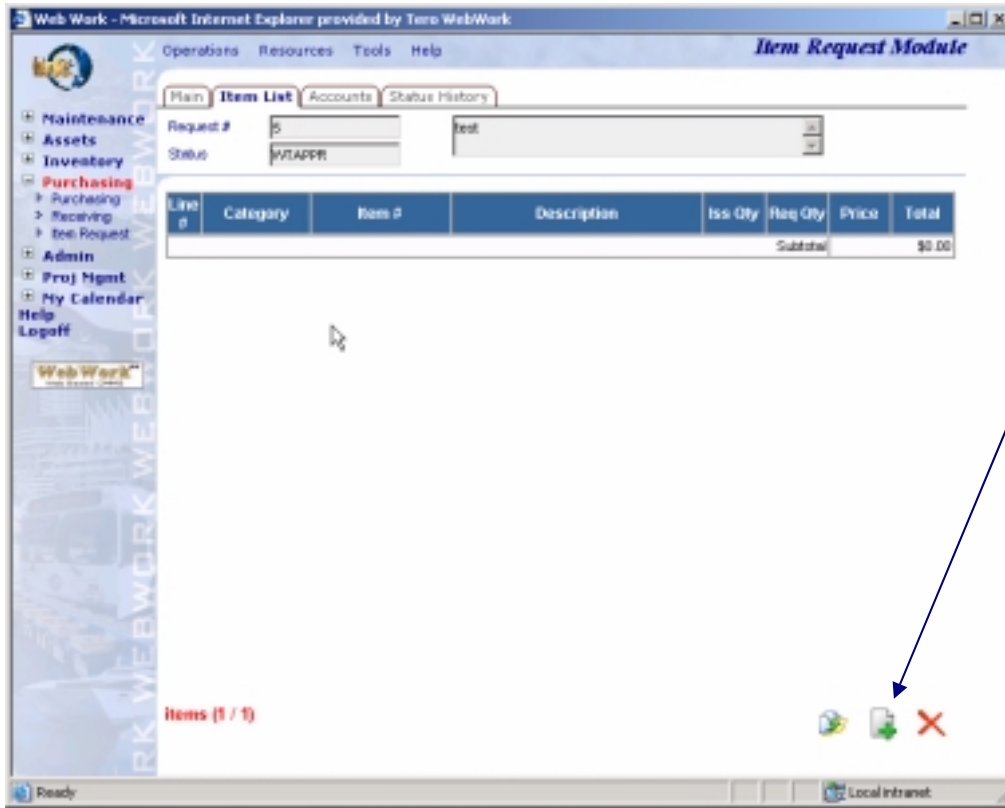
To add individual items to a request:


- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.

- Move your mouse over the Resources menu and select Item List from the drop down menu or click on the Item List tab button.

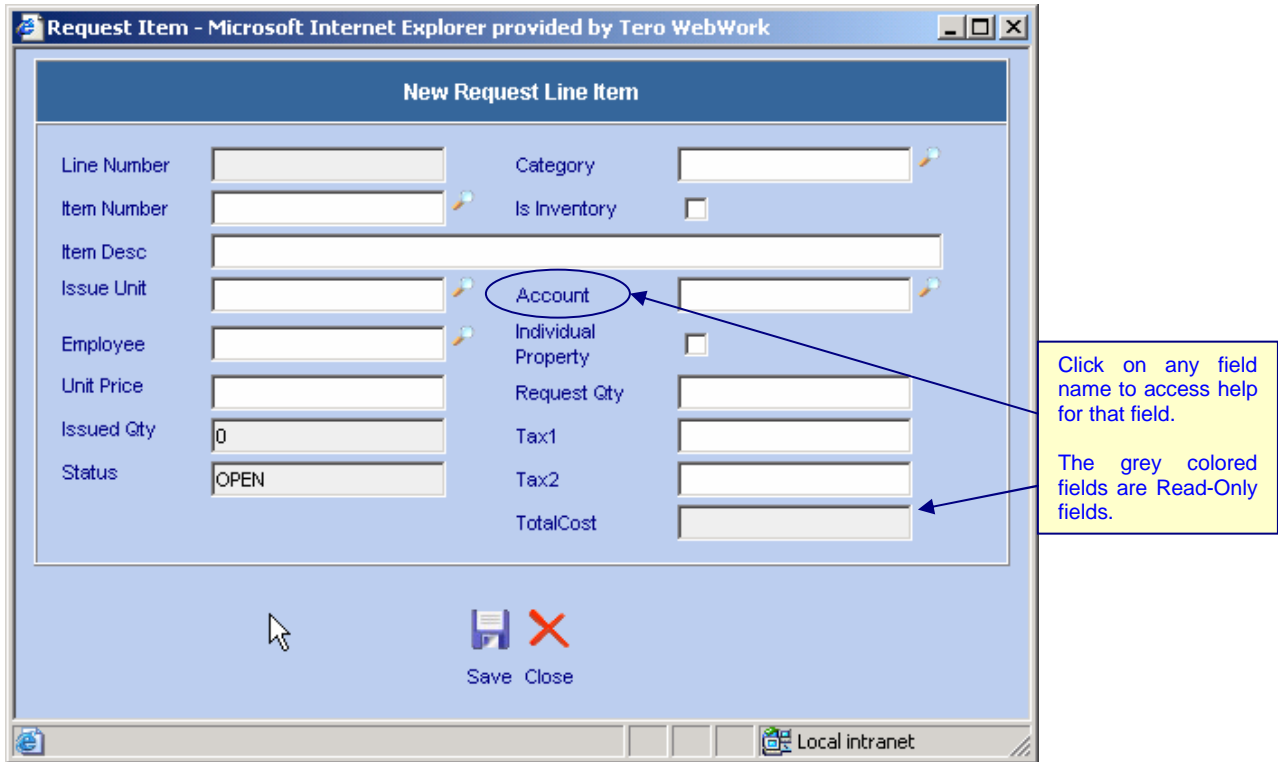





- A screen similar to the one shown below will open:







- Click on the  button to open the New Request Line Item screen.

- A screen similar to the one pictured below will open:



- The Issue To, Issued Qty and Status fields are populated automatically.
- Line # field is read only.
- Enter an item category or click on the  button to select a category from the Web Work database. i.e.: HVAC
- Enter an item number or click on the  button to select an item number from the Web Work database.
- When you select an item, the Description, Issue unit and Price fields populate with the information entered for this inventory item. These fields can be edited.
- Enter an account number if applicable or click on the  button to select an account from the Web Work database.
- Click in the check box beside the Individual Property field, if you will be issuing this to a person.
- Enter the Request Quantity.


- The Tax1 and Tax2 and Total fields will calculate automatically based on system settings in the Admin module. Refer to the Admin module chapter for further details.
- Click on the  button to save the Request item or on the  button to exit the Request Item screen without saving the item request. The item will be displayed in the table when you are on the Items tab.
- Click on the  button to continue adding line items or on the  button to return to the main item request screen.

9.3.2 Adding Request Kits to a Request


To add request kits to a request:

- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move your mouse over the Resources menu and select Item List from the drop down menu or click on the Item List tab button.



- Click on the  button to open the Request Kit screen as pictured below.



- Select applicable kit name from the  drop down list. The contents of the kit will be displayed on the lower portion of the screen.

- Click on the  button to select the kit, the  button to edit the contents of the kit or the  button to return to the main item request screen.



See the Request Kits section of this manual for information on creating and editing Kits.

9.3.3 Editing Line Items

To edit a line item on a request:



- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move mouse over the Resources menu and select Item List from the drop down menu or click on the Item List tab button.



- Click on the applicable Line #, Category, Item # or Description in the table to open the Edit Request Line Item screen as pictured below:

Line Number	1	Category	
Item Number	01-2074	Is Inventory	<input checked="" type="checkbox"/>
Item Desc	GLASS THERMOPANE 27-5/8 X 45-7/8 X 1		
Issue Unit	EA	Account	00-000-850-112-081
Employee	LABOURER	Individual Property	<input type="checkbox"/>
Unit Price	80	Request Qty	1
Issued Qty	0	Tax1	0
Status	OPEN	Tax2	0
		TotalCost	80

Save Delete Close


- Update the information as required.
- Click on the  button to save the updated information or on the  button to exit the without saving the updated information.

9.3.4 Deleting Line Items

To delete a line item:

- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move your mouse over the Resources menu and select Item List from the drop down menu or click on the Item List tab button.



- Click on the applicable Line #, Category, Item # or Description in the table to open the Edit Request Line Item screen.
- Click on the  button to delete the line item and close the Edit Request Line Item screen.

9.4 Request Kits


Request kits can be setup for groups of items that are requested on a frequent basis, to avoid having to re-enter all of the individual items each time a similar item request is entered. Kits may be created for a specific type of job or supply request such as Tune Up or Uniform kit.

9.4.1 Creating Request Kits

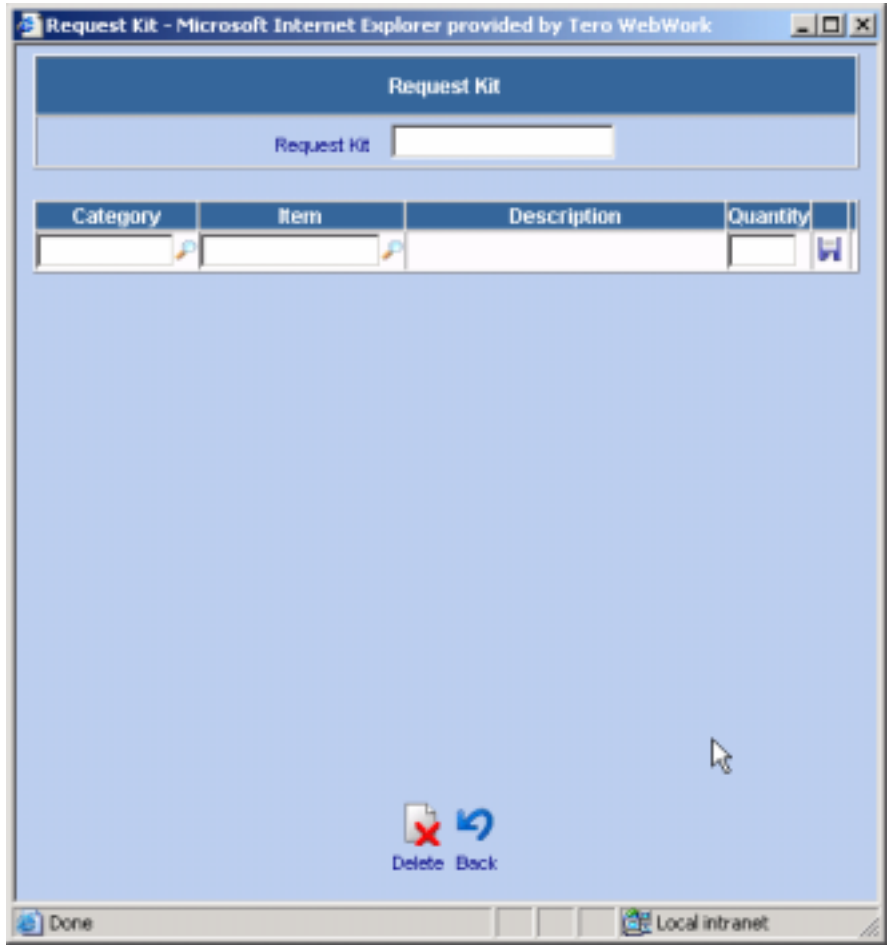
To create a Request Kit:




- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move your mouse over the Resources menu and select Item List from the drop down menu or click on the Item List tab button.



- Click on the  button to open the Request Kit screen.

- Click on the  button to open the Request Kit Management window as pictured below:



- Enter a name for the Request Kit.
- Enter a category or click on the  button to select a category from the Web Work database. i.e.: HVAC.
- Enter an item number or click on the  button to select an item number from the category you selected.
- The Description field will populate with the description of the item you selected.
- Enter the Quantity required.
- Click on the  button to add this item to the kit. The item will be displayed at the top of the table and the blank row will be displayed below it. Continue adding items to the kit as required.



NOTE: You must have an Item Request open in order to access the Item Lists and the Request Kit Management screens.

Category	Item	Description	Quantity		
	01-2074	GLASS THERMOPANE 27-5/8 X 45-7/8 X 1	1		
<input type="text"/>	<input type="text"/>		<input type="text"/>		

- To delete an item, click on the button.
- Click on the button to save the kit.

9.4.2 Editing Request Kits

- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move your mouse over the Resources menu and select Item List from the drop down menu or click on the Item List tab button.





- Click on the button to open the Request Kit screen.
- Select an applicable kit name from the drop down list. The contents of the kit will be displayed on the lower portion of the screen.
- Click on the button to open the Edit Item Kit screen. You can change the quantity or delete the line you want to edit.
- To add items to the kit enter the Category, Line Item and Quantity and click on the button. To delete items from the kit click on button at the far right hand side of the applicable row.

9.5 Changing the Status of a Request

To change the status of a request:

- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move your mouse over the Operations menu at the top of the screen to display the drop down menu.
- Select Change Status from the drop down menu.
- The Item Request Status Change screen will open as pictured below:



- Click on the drop down list to select the new status.
- Click on the  button to save the status change or on the  button to exit the without updating the status.


9.6 Item Request Accounts


An item request can be assigned to one account or to a variety of accounts depending on the accounting practices of your organization. If only one account will be used simply enter the applicable account in the Account # field on the main Item Request screen. Multiple accounts can be assigned by a percentage or dollar amount.




9.6.1 To apply item request costs to more than one Account

- Perform an Item Request query to locate and open the applicable item request. See Item Request queries for more information on performing item request queries.
- Move your mouse over the Resources menu and select Accounts from the drop down menu or click on the Accounts tab button.



- The Item Request will open in Accounts mode.
- Click on the  button to open the Add Item Request Accounts screen as pictured below:

- The Request # is populated with the request number entered on the Item Request.
- Enter an account into the Account field, or click on the  button to select an account from the Web Work database.

- Enter the percentage of the Item Request that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percent.
- The cost amount will be calculated automatically by the Web Work system.
- Click the button beside Keep Percentage to fix the amount to a percentage. Or click the button beside Keep Cost to fix the cost and let the percentage change.
- Click on the  button to save this account information and return to the item request in Accounts mode.
- You can click on the  button to continue adding accounts or on the  button to return to the main screen of the Item Request.



When you are in a RESOURCES menu item and want to return to the main item request screen, you can click on the RESOURCES button and select Details from the drop down menu.

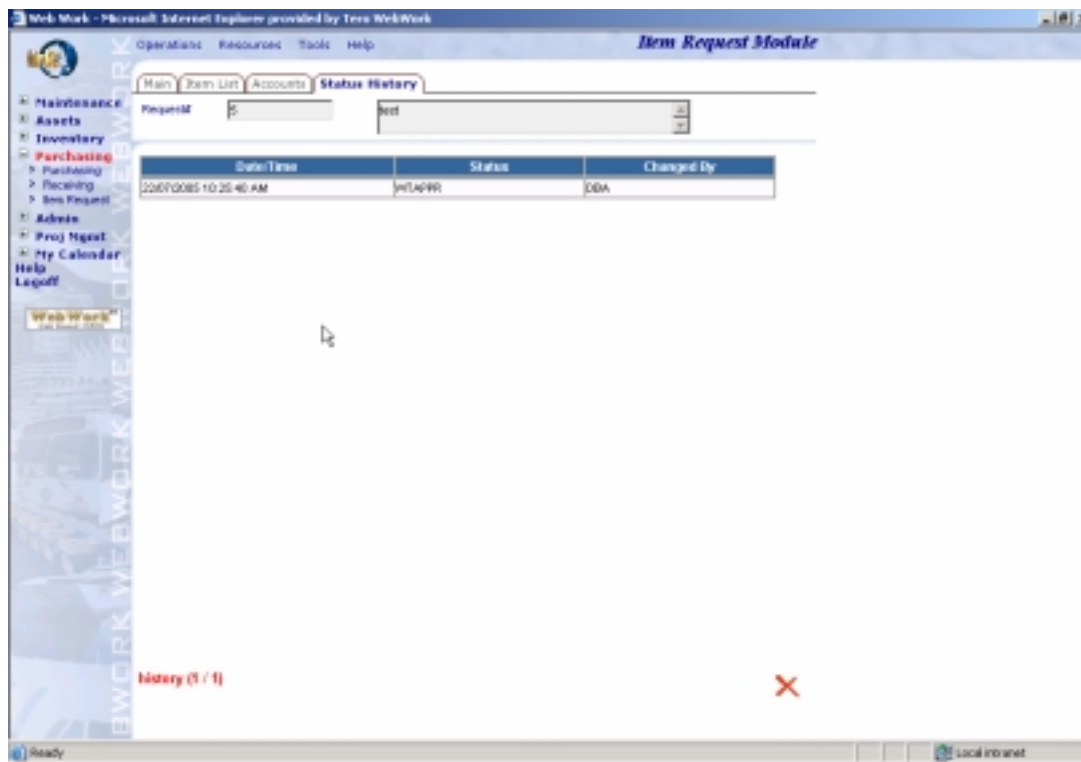
9.6.2 Item Request Status History


To view the status history for an Item Request:

- Lookup the applicable Request on the screen.
- Move your mouse over the **Resources** menu and select Status History or click on the Status History tab button as seen here.



- The following screen will open:




- The first column shows the date and time of the status change.
- The second column shows the changed status.
- The third column shows name of the user who performed the status change.
- To exit Item Request status history click on the  button.

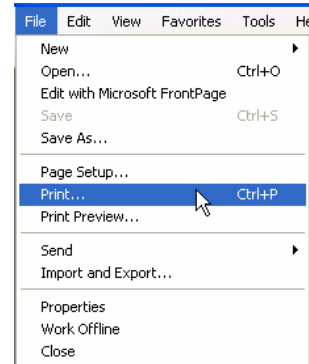
9.7 Printing Item Requests

You can print an individual Item Request or a batch of Item Requests that you have selected and retrieved.

9.7.1 Printing Individual Item Requests

To print only the Item Request that is open on the screen:

- Click on the  button at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing as seen here to the right.



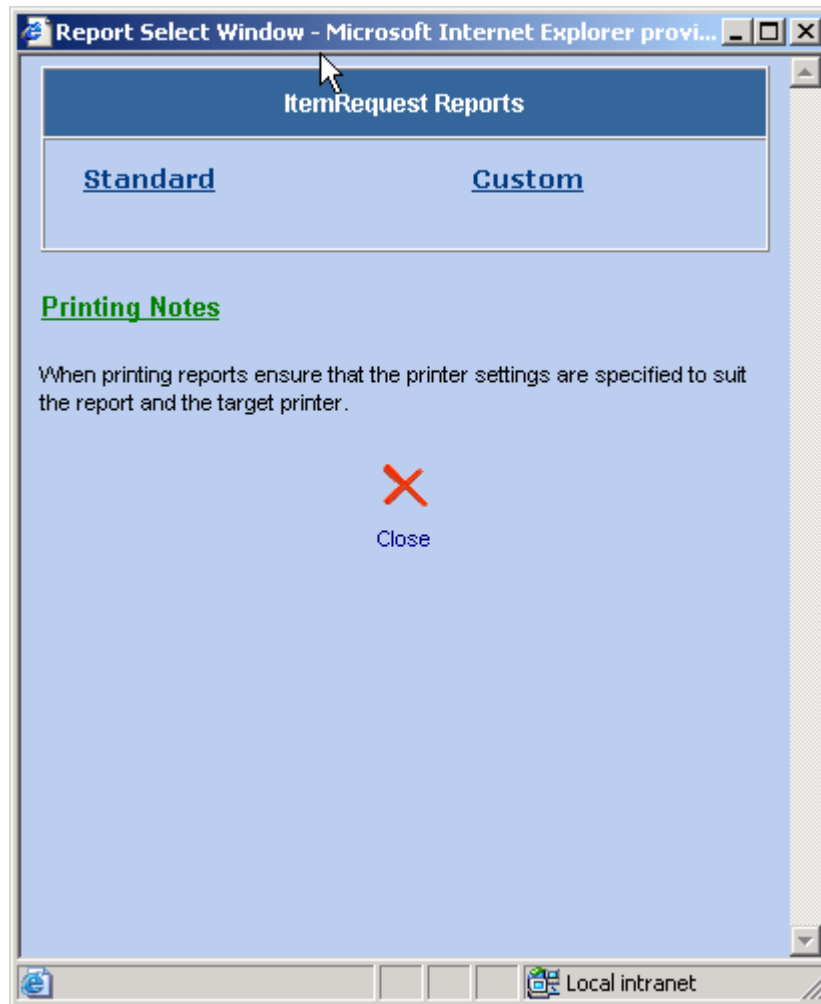
9.7.2 Printing Multiple Item Requests

To print a batch of Item Requests:

- Perform an Item Request query and retrieve the desired Item Requests. See Item Request Queries for more information on performing Item Request queries.
- Move your mouse over the Operations menu and choose Print Selected Request from the drop down menu.
- The selected records will open in a new browser window.
- Click on File and select Print from the browser's drop down menu to proceed with printing.

9.8 Item Request – Reports

- To access Item Request reports click on the Tools menu and select Reports from the drop down menu.
- A screen similar to the one shown below will open:



- Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Item Request module will be displayed. To view all reports, click on the **Reports** button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

9.8.1 Creating Item Request Reports

- Reports cannot be created in the Item Request module. To create an Item Request report click on the **Reports** button to access the report writer and create the report.

9.8.2 Printing Item Request Reports

Item Request reports can be printed from the Item Request module or from the Reports module.

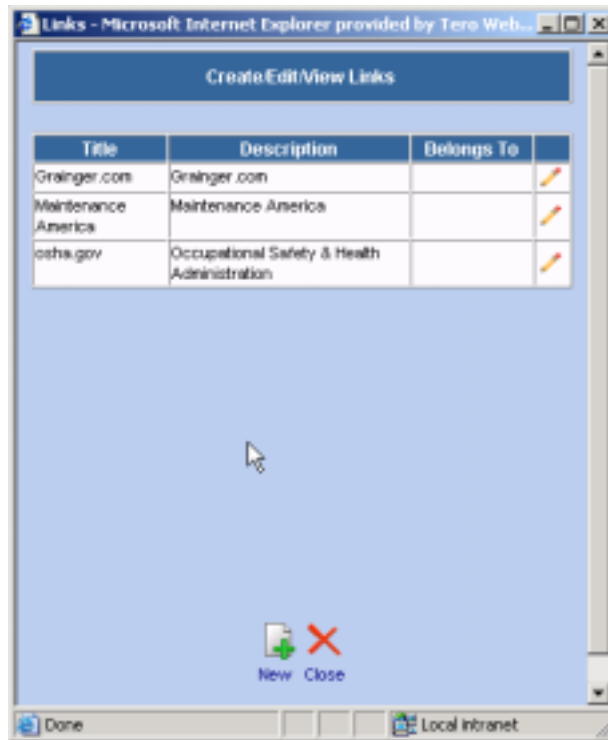
9.8.3 To print a report in the Item Request module:

- Open the Item Request module.
- Move your mouse over the Tools menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on it's title.
- The report will open in Preview mode.
- Click on File and select Print from the drop down menu to print the report.

9.9 Links

When you are in the Item Request module and select Links from the Tools menu, the Web Work Create/Edit Links window will open as shown below.

- You can view existing links or create new links using this feature.



You can only view links which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

- For information on creating New links see the Links section of this manual.