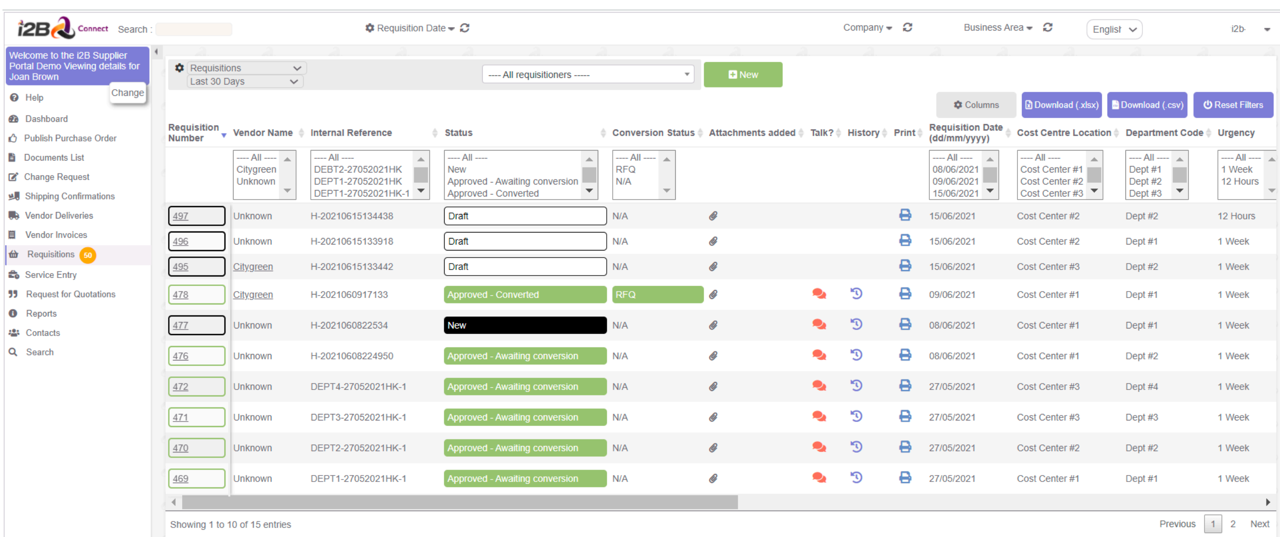
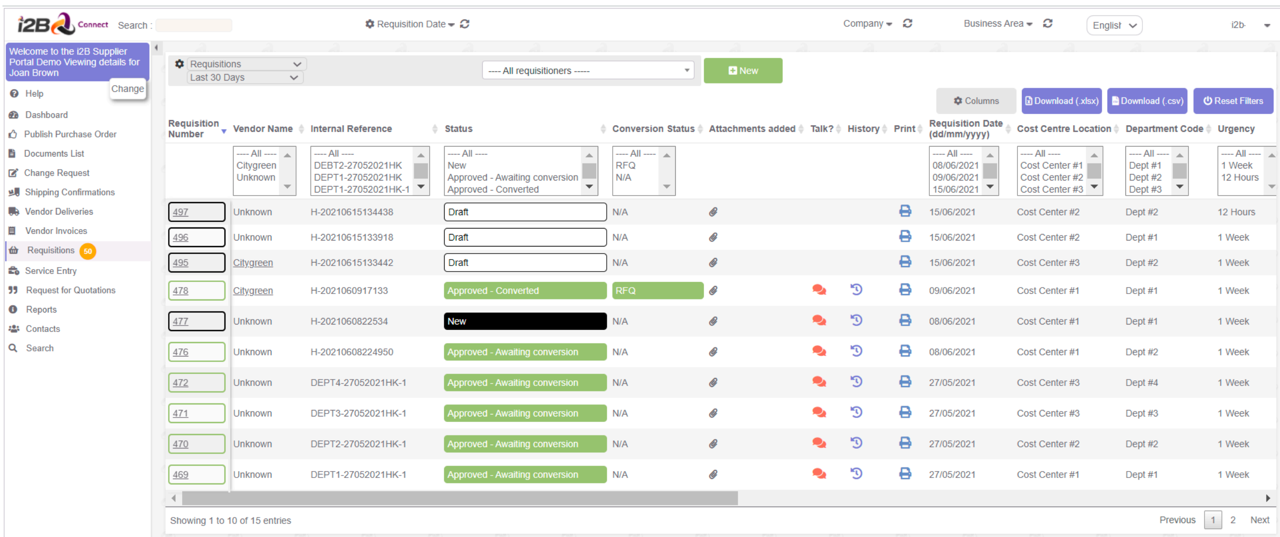
How to use the i2B Connect System - Requisitioner

Requisitioner Guide

Version : March 9th 2021





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How to use the i2B Connect System

Introduction

The purpose of the i2B Connect system is to:

- Provide a more efficient means of communication.
- Reduce administration
- To provide the buyer with more detailed real time information.

As a requisitioner using i2B Connect you will have access to:

- Create draft requisitions.
- Complete requisitions and send for approval.
- Delegate requisitions to new approvers.
- View status of requisitions.
- Produce reports of requisitions.

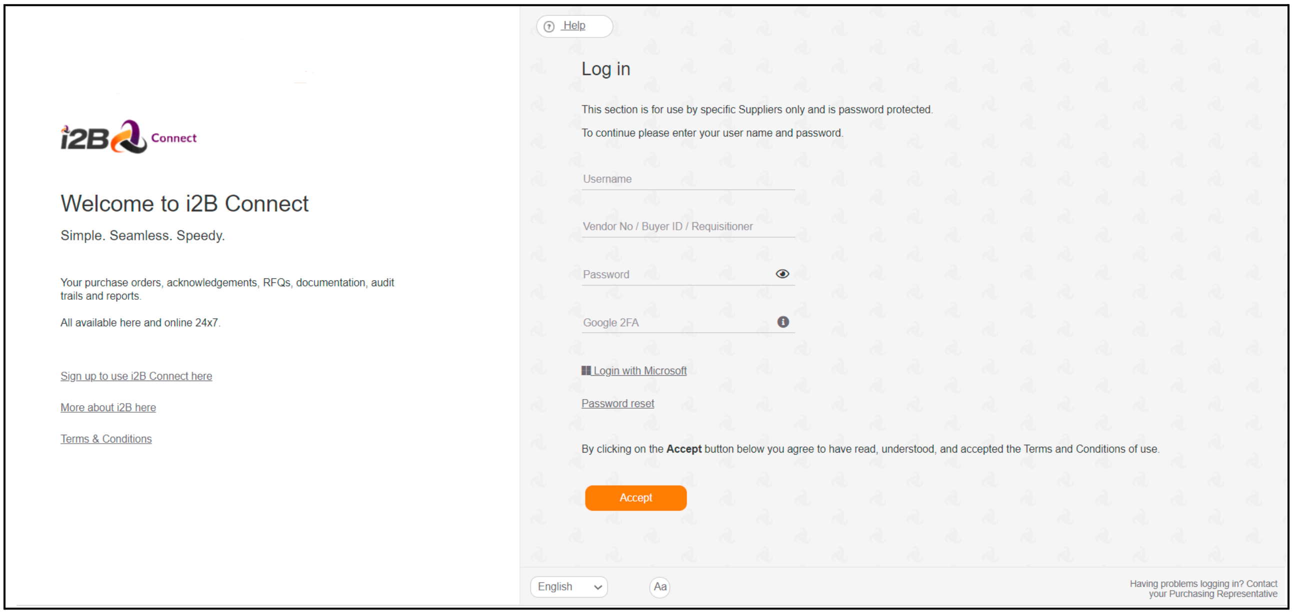
Questions - have you checked the knowledge base for FAQ?

Any problems with the i2B Connect system please contact supportdesk@i2b-online.com

MENU

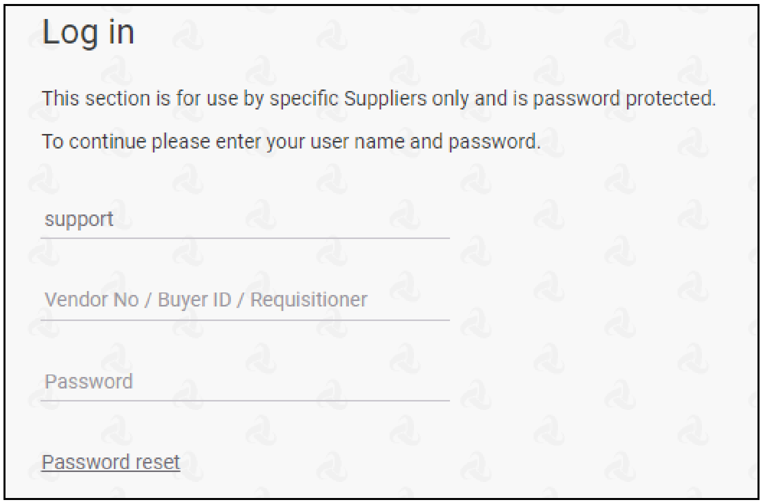
Logging Into i2B Connect

Requisitioner Login



You will have received an email with your i2B Connect web address link on it. If you have not received this, then please contact your company i2B administrator, or Super User.

Enter this into your browser address bar. You will be shown the i2B Connect welcome page. The welcome page is shown (above).



Your Credentials

Your username, Requisitioner (REQ- followed by your unique number) and password are unique to you and will have already received them via email.

If you require these again, please contact your purchasing representative who emailed you.

If you have forgotten your password you can use the “**Password Reset**” link, to help you reset your user password. Remember to put your username in first before pressing the link.

Languages

You can change the language of the i2B Connect system at any time. Click on the language drop down at the bottom of the welcome screen - to select your prefered language.

Terms

By logging into the system and clicking “**Accept**” you are agreeing to have read, understood and accepted the Terms and Conditions of use of the system.

NOTES

If you need these again please email your i2B Connect administrator.

Alternatively if your company has users Azure Active Directory then ensure your email address is assigned to an AD group.

If this person is not available please contact i2B support at supportdesk@i2b-online.com.

Customising Your Display

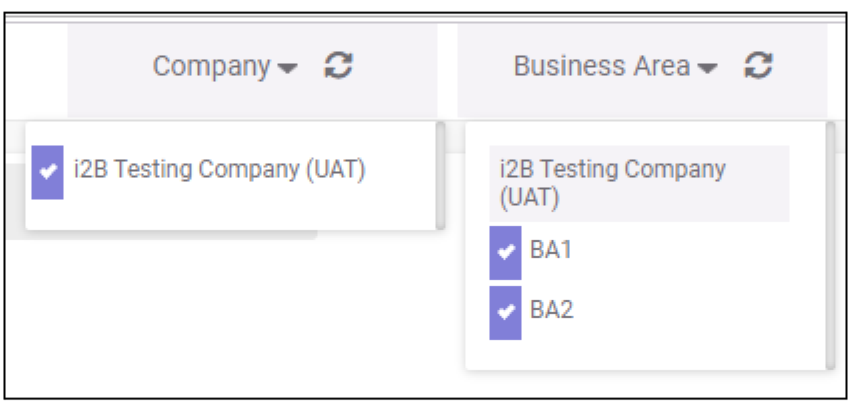
Display & Filter Options

Once logged in at the top of each page you have the ability to search the current display, filter the company & business area you are viewing, and change the language display. See example below

Search: Allows you to search/filter the current display for a document number or description text.

Company: If you have access to view orders from more than one company, you can choose which companies data to view from a drop down list.

Business area: If any of the companies that you can access, are divided into Business Areas, you can choose which ones to view from a drop down list. (See example below)

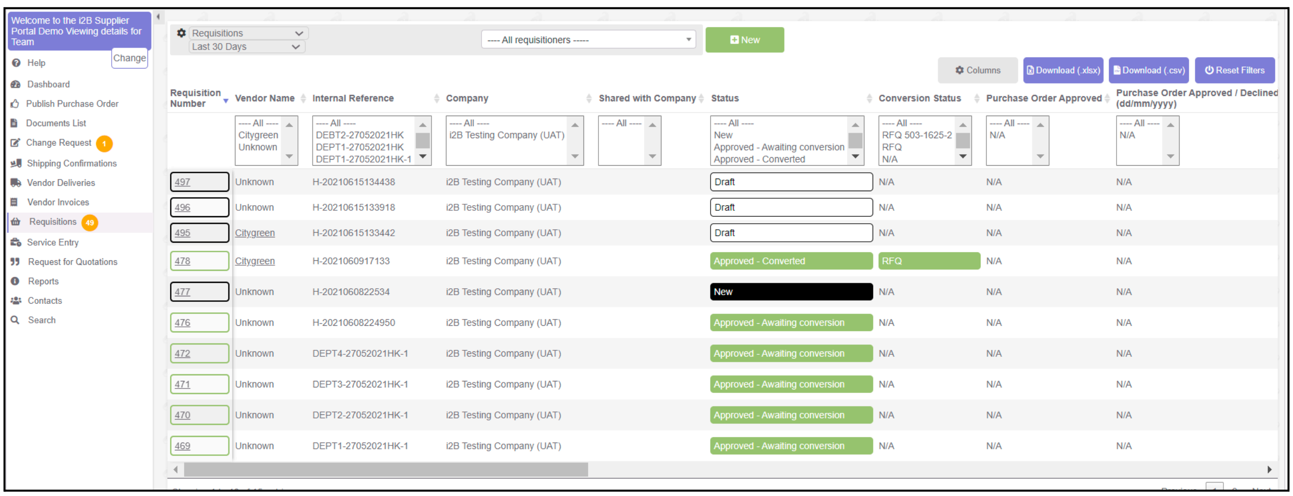


Language Option: Choose from a drop down list of available language options, in which to view the system.

Detail or summary view: To view your requisitions at line level you can switch the view from header level to line (and back again) by using the drop down and change the view from “Requisitions” to “Requisitions (with lines)”.

There is an additional filter which defaults to LAST 30 DAYS, this can be changed to look for requisitions older than 30 days. When searching for a requisition ensure that this filter is set to ALL.

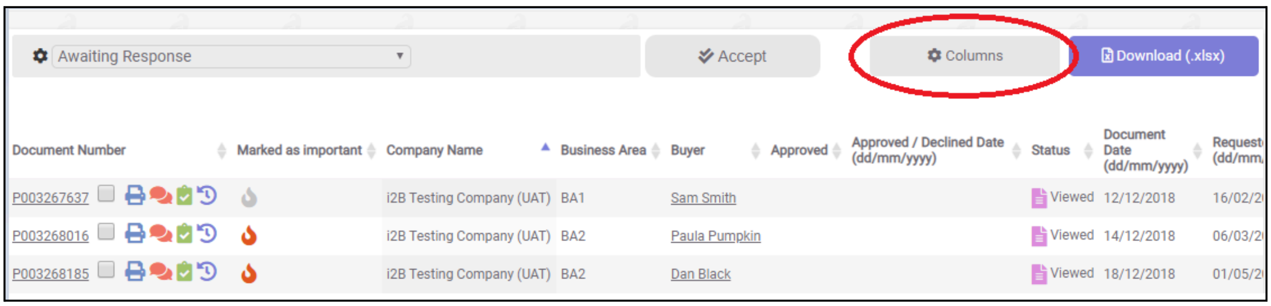
Filter display: Your requisitions page will allow you to filter the displayed results using the filter above each column, by holding down the CTRL key you can select more than one filter per column.



When a search / filter has been enabled then the system remembers this the next time you log into i2B (unless you clear your cookies). In order to clear any and all search and filters then you can do this simply by selecting the **RESET FILTERS** button highlighted below.

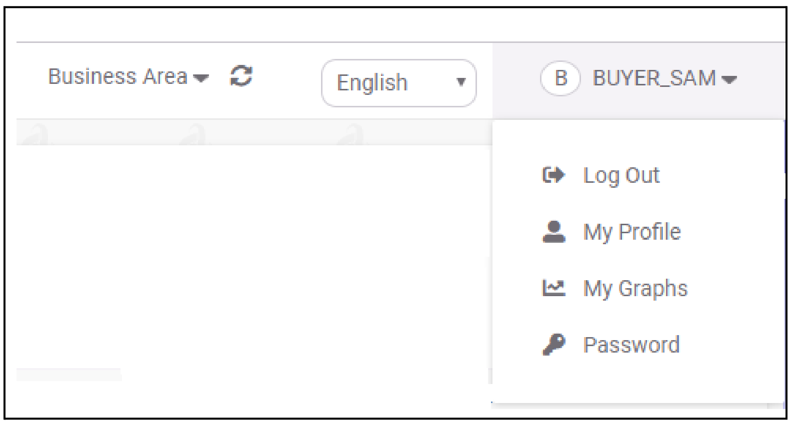
Column Sorting: Clicking on any of the column headings, will sort your display by that column (ascending order). Clicking it again, will change to a descending order.

Column Selection: On each section of i2B Connect, you can tailor the data columns displayed by selecting or deselecting the available columns. Just click on the "**Columns**" button, as shown below.



Your User Profile

In addition to the filter and display options, the top right corner of the screen allows you to change your user profile or log out of the system. Click on your username in the top left hand corner of the screen to see your profile options.



Password

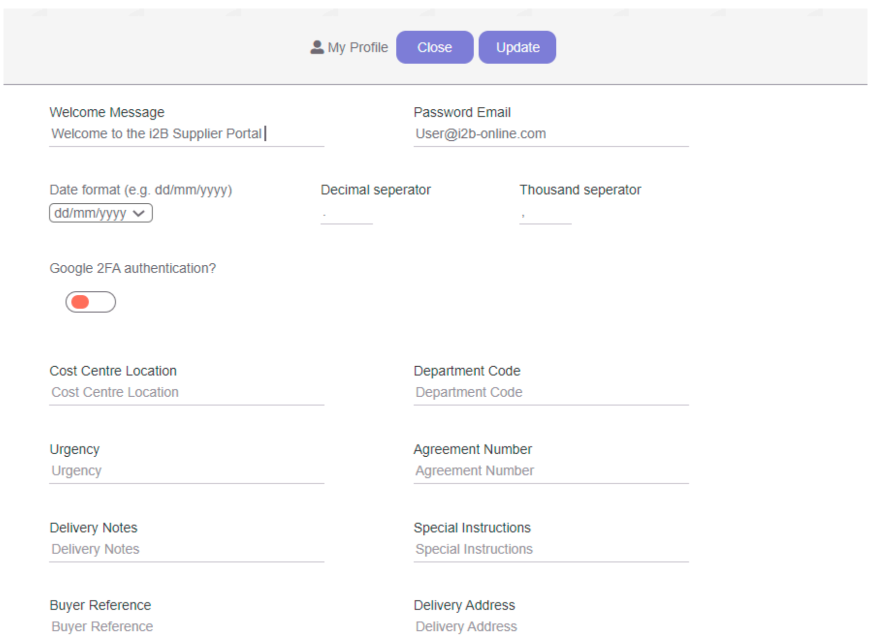
Here you can change your profile password - by entering your current and your new chosen password. **NB**: The password has to be a minimum of 8 characters long and include 1 uppercase, 1 lowercase and 1 special character.

Once updated your new password is active. You can "**Log Out**" - from the drop down list when clicking your username - and log back in again using your new password at any time.

My Profile

Update your profile details here. You can set your welcome message, change your email address and customise what numeric separator you prefer (decimal/thousands) and set your preferred date format.

Also under my profile you can set default values to be pre populated when you raise a requisition, for example cost centre, department, agreement number (they can still be edited if required).

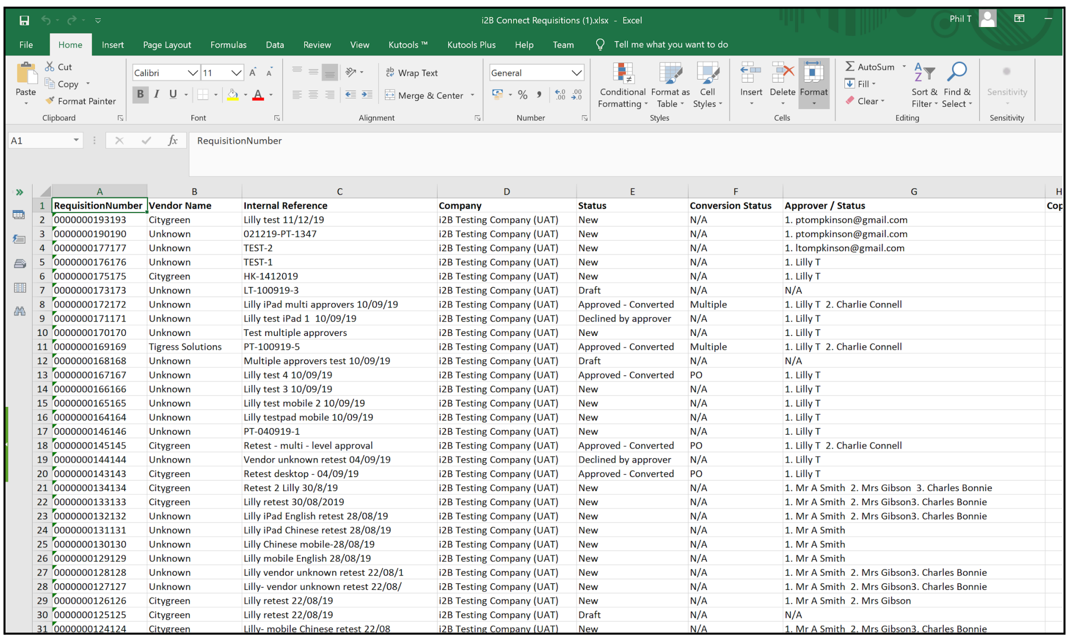


Data Tables & Downloading

In addition to letting you view - and interact - with your data, you can quickly download any of the data that you are viewing should you need to.

Look for the download button on each screen **Download (.xlsx)**

Clicking this, will download the data on the screen to a .xlsx file on your local machine. (Example below)

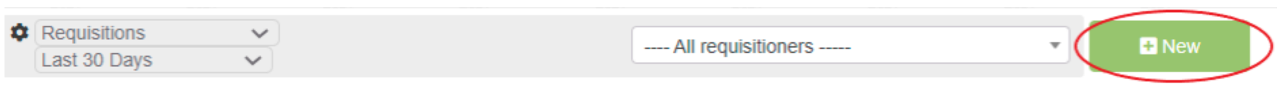


RequisitionNumber	Vendor Name	Internal Reference	Company	Status	Conversion Status	Approver / Status	Cop
0000000193193	Citygreen	Lilly test 11/12/19	i2B Testing Company (UAT)	New	N/A	1. ptompkinson@gmail.com	
0000000190190	Unknown	021219-PT-1347	i2B Testing Company (UAT)	New	N/A	1. ptompkinson@gmail.com	
0000000177177	Unknown	TEST-2	i2B Testing Company (UAT)	New	N/A	1. ltompkinson@gmail.com	
0000000176176	Unknown	TEST-1	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000175175	Citygreen	HK-1412019	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000173173	Unknown	LT-100919-3	i2B Testing Company (UAT)	Draft	N/A	N/A	
0000000172172	Unknown	Lilly iPad multi approvers 10/09/19	i2B Testing Company (UAT)	Approved - Converted	Multiple	1. Lilly T 2. Charlie Connell	
0000000171171	Unknown	Lilly test iPad 1 10/09/19	i2B Testing Company (UAT)	Declined by approver	N/A	1. Lilly T	
0000000170170	Unknown	Test multiple approvers	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000169169	Tigress Solutions	PT-100919-5	i2B Testing Company (UAT)	Approved - Converted	Multiple	1. Lilly T 2. Charlie Connell	
0000000168168	Unknown	Multiple approvers test 10/09/19	i2B Testing Company (UAT)	Draft	N/A	N/A	
0000000167167	Unknown	Lilly test 4 10/09/19	i2B Testing Company (UAT)	Approved - Converted	PO	1. Lilly T	
0000000166166	Unknown	Lilly test 3 10/09/19	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000165165	Unknown	Lilly test mobile 2 10/09/19	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000164164	Unknown	Lilly testpad mobile 10/09/19	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000146146	Unknown	PT-040919-1	i2B Testing Company (UAT)	New	N/A	1. Lilly T	
0000000145145	Citygreen	Retest - multi - level approval	i2B Testing Company (UAT)	Approved - Converted	PO	1. Lilly T 2. Charlie Connell	
0000000144144	Unknown	Vendor unknown retest 04/09/19	i2B Testing Company (UAT)	Declined by approver	N/A	1. Lilly T	
0000000143143	Citygreen	Retest desktop - 04/09/19	i2B Testing Company (UAT)	Approved - Converted	PO	1. Lilly T	
0000000134134	Citygreen	Retest 2 Lilly 30/8/19	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson 3. Charles Bonnie	
0000000133133	Citygreen	Lilly retest 30/08/2019	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson3. Charles Bonnie	
0000000132132	Unknown	Lilly iPad English retest 28/08/19	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson3. Charles Bonnie	
0000000131131	Unknown	Lilly iPad Chinese retest 28/08/19	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith	
0000000130130	Unknown	Lilly Chinese mobile-28/08/19	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith	
0000000129129	Unknown	Lilly mobile English 28/08/19	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith	
0000000128128	Unknown	Lilly vendor unknown retest 22/08/1	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson3. Charles Bonnie	
0000000127127	Unknown	Lilly- vendor unknown retest 22/08/	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson3. Charles Bonnie	
0000000126126	Citygreen	Lilly retest 22/08/19	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson	
0000000125125	Citygreen	Lilly retest 22/08/19	i2B Testing Company (UAT)	Draft	N/A	N/A	
0000000124124	Citygreen	Lilly- mobile Chinese retest 22/08	i2B Testing Company (UAT)	New	N/A	1. Mr A Smith 2. Mrs Gibson3. Charles Bonnie	

Creating A Requisition

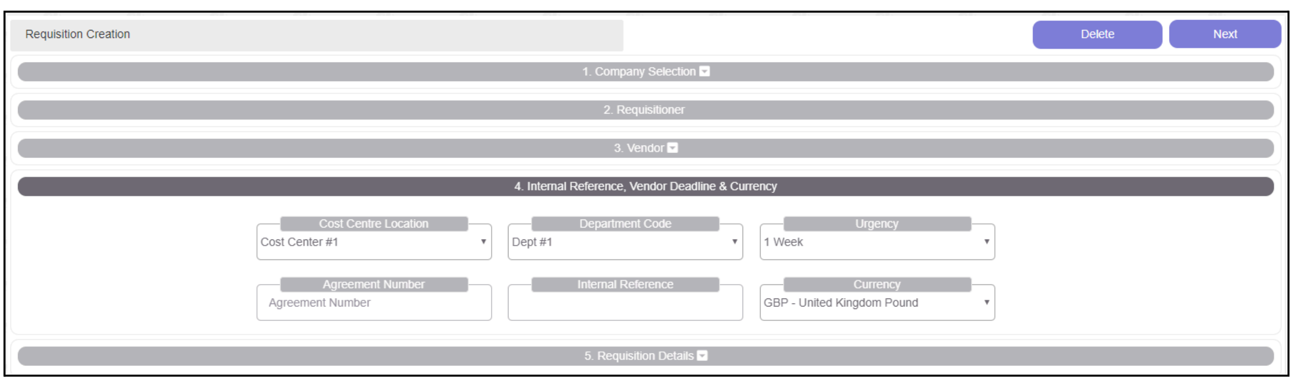
Step by step guide

At the top of the page next to the drop down filter is a “+ New” button. Clicking on this link will start the requisition creation process.



If you have access to multiple companies within the system you will be asked which company you are raising the requisition against. The requisitioner section will autocomplete with your requisitioner username.

Internal Reference / Header fields



You will be asked to enter / select entries in this section that are specific to your company. The example above shows “Cost Center Location”, “Department Code” etc. This will be different for your company. The headings / drop down selections are specific to your company's configuration.

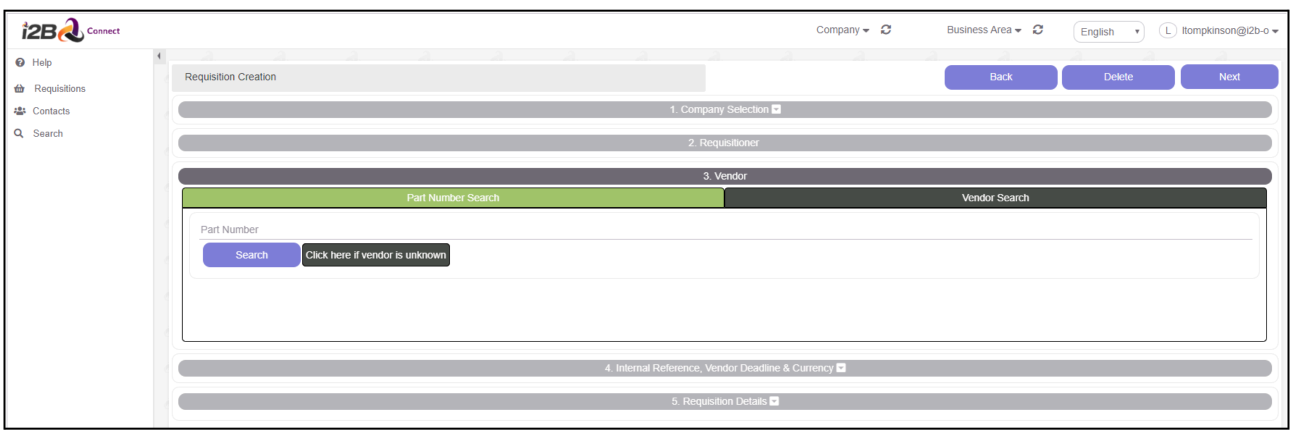
The selections you make here are important. They are used to determine the approver of your requisition once completed.

The “Internal Reference” is mandatory and the system will also check this is unique. If you are unsure what to use here please use the auto generate a unique reference number.

The currency is also important - Again this is used to determine the approver and the limit that you are able to requisition.

Once you’re ready to proceed, click on the “**Next**” button. Your internal reference will be validated as unique at this point. If a duplicate is found you’ll be redirected back to re-enter.

Part Number Search / Vendor Search



You will be asked to enter in the part or code that you would like to requisition. You have the option here of typing in a part or code into the “Part Number” field. The system will assist you by autocompleting if it finds the code / description you are typing. For example if you type “sign” it will autocomplete with valid parts / codes with the sign as part of the code / description.

The system when you click on search will bring back a list of vendors who have provided this part / code previously. You can then select the preferred vendor from the list.

RETURN TO MENU

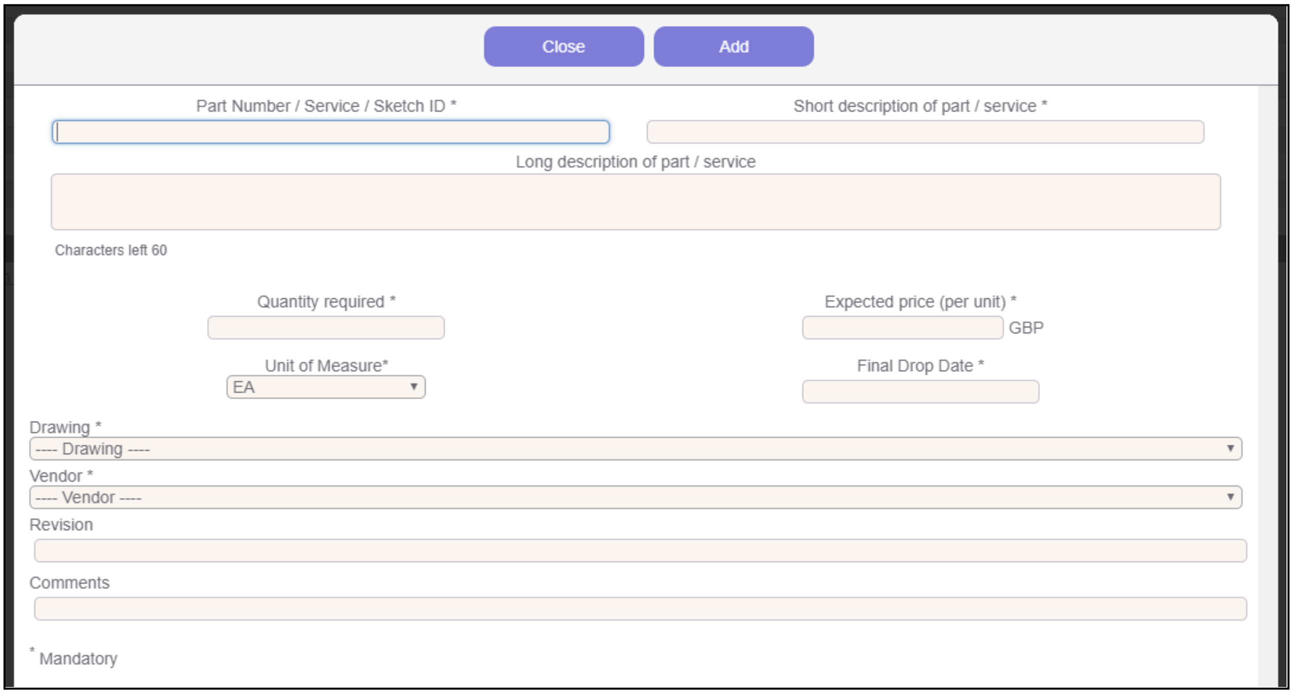
If you don't know the part but know the vendor you usually use you can click the "Vendor Search" heading. This will allow you to search all your vendors and select the vendor you'd like to use.

If you can't find the part / code or vendor or just want to skip this part click on the "Vendor is Unknown" button.
Once you're ready to proceed click on the "**Next**" button. Your unique reference will be validated as unique at this point. If a duplicate is found you'll be redirected back to re-enter.

Adding a requisition line

Click on the "Add requisition line" link. This will bring up the following screen. If you had already found the part / code during the search in the previous step then the "Part Number / Service / Sketch ID", "Short Description" and "Long Description" will be auto populated.

If these are not auto populated then you again can type in a part number / code and it will attempt to auto complete this for you. This field is free entry but mandatory. If you're not sure of the code or its a product / code that's never been purchased before, then type in a short code for the requisition. The procurement department can complete this later for you with the correct part number / code once it's been created.



Enter in the quantity required and the unit of measure that you'd like. So for example if you want to requisition a laptop, the quantity would be 1 and the unit would be EA (for each). If you wanted to requisition some parts in KG you would enter the number of KG you require and in the unit select KG.

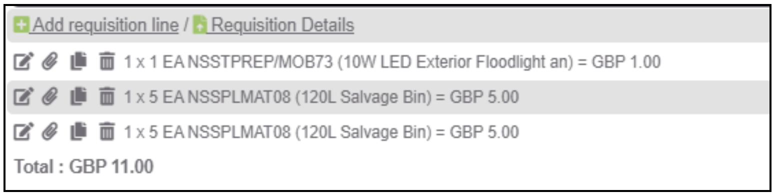
The expected price is per unit. So using the above example, if you're requisitioning in EA the price would be per each unit. If you're requisitioning in KG the price would be per KG.

Enter a required delivery date / drop date and then complete the detail line fields.

Like the header fields previously the line fields will be configured to your company requirements. In the above example it's selecting a Drawing and a Vendor, for your company this will be different. Some may be mandatory. These will be marked with an asterix.

Once you have completed the above click on the "**Add**" button at the top of the screen.

You will be returned back to the requisition creation page.



From here you can click on the “Add requisition line” button again to create another line. You can repeat this process as many times as you require.

Edit - You can click on the edit icon to edit a line
Attach - You can click on the attachment icon to add any attachments relevant to each line
Copy - You can click on the copy icon which will copy all the line fields previously entered.
Delete - You can click on the delete icon to delete a line

You can click on the “**Save**” button at the top of the page at any point. This will save your requisition in its current state and put the status to “Draft”. You can then access this requisition again from your requisitions list by clicking on the requisition number that i2B will generate.

If you click on the “**Finish**” button this then validates your requisition and automatically selects the correct approver (or approvers) required to approve your requisition.

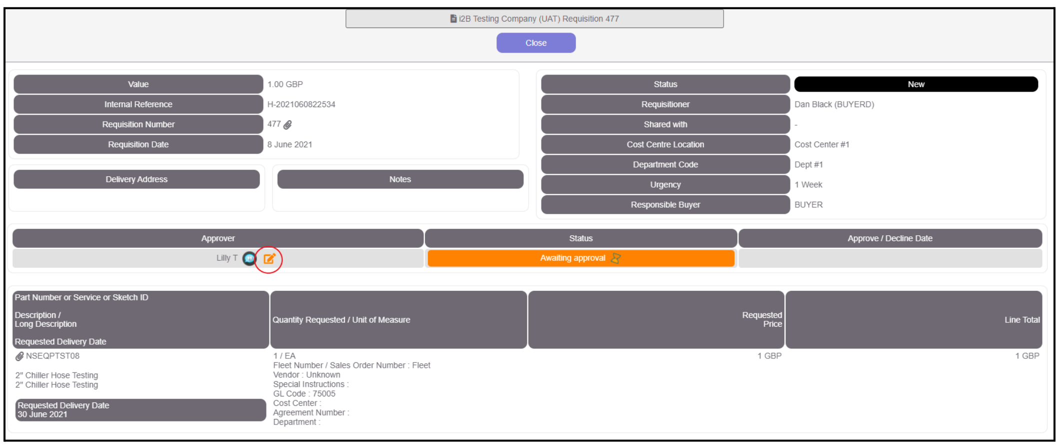
You will have the opportunity to select a different approver if the wrong approver was selected after the requisition has been raised.

Change approver

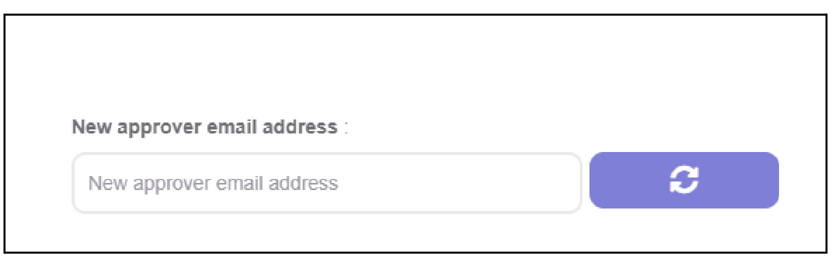
If you would like to change the approver (or approvers) assigned to action your requisition this can be done once a requisition has been created.

In order to change the approver the requisitioner is required to navigate to the requisition module, open the requisition in question.

Underneath the APPROVER section there is a symbol (highlighted in red in the image below) in order to change the approver you need to click this button.

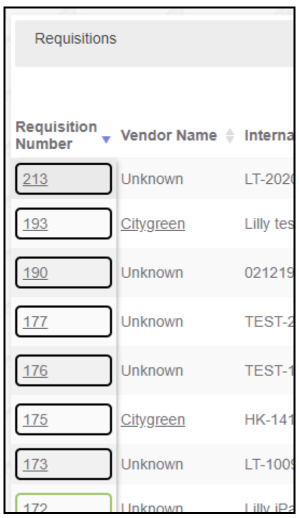


You will then be presented with the screen below where you can enter in a new APPROVER EMAIL ADDRESS. The email address domain is validated against the domains of email addresses of buyers in the same company.



Email alerts, Audit Trails and Delegation

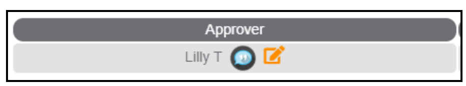
Everytime your requisition is viewed or actioned by approvers / procurement it will update your requisition history.



From the requisitions overview page you can click on any requisition number to view this.

At the bottom of the page you will see the history / audit trail for your requisition.

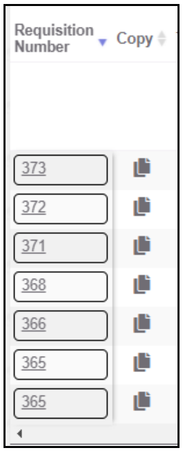
You will be able to see when your approver has looked at your requisition and whether they've approved or declined it.



You can change the approver for your requisition if your approver is unavailable / on vacation. Click on the edit button next to their name to change this. The original approver and new approver will be automatically alerted.

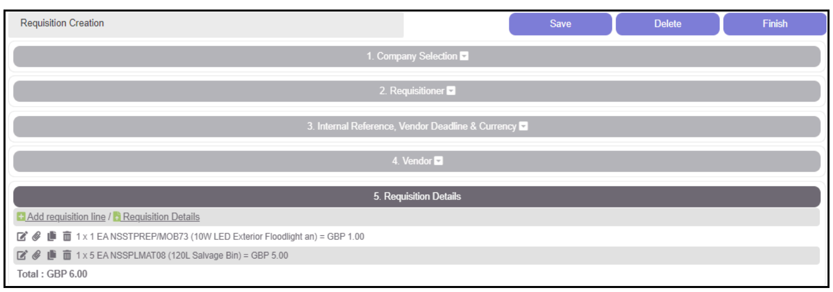
Once approved you'll be able to see if the procurement department has viewed and actioned it. They can convert your requisition to a purchase order, a request for quotation from the vendor (or multiple vendors) or a distribution order. All this will show in the requisitions history / audit trail as well as being emailed to you.

Copy Requisition (header)



From the requisitions overview page you can click the copy icon, which will replicate all fields(details) and lines entered on a previously saved requisition. Once copied you will be navigated to the Requisition creation page.

The requisition fields can still be amended if required. If you're happy with all the details, You can click on the "**Save**" button at the top of the page at any point. This will save your requisition in its current state and put the status to "Draft". You can then access this requisition again from your requisitions list by clicking on the requisition number that i2B will generate.



If you click on the "**Finish**" button this then validates your requisition and automatically selects the correct approver (or approvers) required to approve your requisition.

Daily reports

A daily report will be emailed to requisitioners to advise them of the status of all their requisitions. The report will also contain any details on the requisition that have been changed will also be highlighted on the daily email.

No action is required on these emails it is for information only.

An example of this is shown below.

Company Name - Your daily requisition updates

DO donotreply@i2b-online.com
To requisitioner@company.com

Requisition: 27561
Update: Requisition updated - Approver (M3 User ID) SET TO "PHILLNICH"
Update: Requisition updated - Requisitioner (M3 User ID) SET TO "DANIERIPI"
Update: Requisition updated - Buyer Reference SET TO "RD0-PARTS FOR UTE"
Update: Requisition for XX76010 (Hose Air CRec) updated - Description set to "Hose Air CRec"
Update: Requisition for XX76010 (Hose Air CRec) updated - Long description set to "Braided "
Update: Requisition for XX76010 (Hose Air CRec) updated - Quantity set to "2"
Update: Requisition for XX76010 (Hose Air CRec) updated - Price set to "65.46"
Update: Requisition for XX701160 (Hose Air CRec) updated - Item set to "XX701160"
Update: Requisition for XX701160 (Hose Air CRec) updated - GL Code set to "70116"
Update: Requisition for XX701160 (Hose Air Recoil 10mm x 10M) updated - Description set to "Hose Air Recoil 10mm x 10M"
Update: Requisition for XX701160 (Air Blow Gun 100mm Brass) updated - Description set to "Air Blow Gun 100mm Brass"
Update: Requisition for XX701160 (Air Blow Gun 100mm Brass) updated - Price set to "10.91"
Update: Requisition updated - Special Instructions SET TO "QT # 67171"
Update: Requisition for XX70116O (Air Blow Gun 100mm Brass) updated - Item set to "XX70116O"
Update: Requisition for XX70116O (Hose Air Recoil 10mm x 10M) updated - Item set to "XX70116O"
Update: Requisition 2 X XX70116O converted to PO
Update: M3 PO Batch Number ["3444040"]
Update: Purchase order creation successful