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PowerGate Remote Requisitioning is a web based application that allows you to easily requisition goods or services from an electronic catalogue resulting in the automatic creation of an approved requisition. This simple process can result in a purchase order being received by the supplier on the same day as your request, which is significantly quicker than paper based requisitioning.

The purpose of PowerGate Web is to give users the ability to requisition products and approve products without having an installation of PowerGate on their PC.
Logging On

Welcome to the PowerGate Remote Requisitioning home page. Before you can begin to requisition items, you must first login. Click Login or any other tab to begin. When you have logged in you will be directed to the Home screen.

TIP
Add PowerGate to your favourites. To enable you to easily return to the PowerGate home page why not add it to your Internet Explorer favourites. To do this, click the Add to Favourites menu option from the Favourites menu.

HELP
Unable to login. If you are unable to login due to a forgotten password or any other reason, contact your system administrator who will be able to help you.

Logging onto PowerGate Remote Requisitioning

1. Click Login to display the Login screen.
2. Enter your username and password. Please note that passwords are case sensitive.
3. Click the Login button to log onto PowerGate Remote Requisitioning.
All Items Screen

The All items screen can be located under the Catalogue tab. This screen is a searchable catalogue of all items that you have authority to requisition. You will see a further 3 tabs labelled Shopping Lists, Recent Items and My Favourites, these screens will be explained later in the user guide.

TIP

Cannot find an item? If you are experiencing difficulty in finding an item that you have authority to, it may be because the word you are searching for is misspelled in the catalogue. Try searching with only part of your original search word by removing leading or trailing letters.

TIP

My Favourites. Non free-form items that you requisition frequently can be added to your favourites list by clicking on the Add to Favourites (+Fav) button.

Using Catalogues

1. On the All Items tab under the main Catalogue tab, enter a search word or words and click Go. Search words can be any text that appears in either the item code or description fields.

2. The first 200 items or 10 pages that match your search criteria are displayed in item description order.

3. The item you are looking for may not appear on the first page. Click Next or a page number to display items on that page.

4. An information message will be displayed if more than 200 items matched your search criteria. When this is displayed, it is advisable to refine your search criteria by adding additional search words.

5. Click the Information button to display additional details about the selected item. The additional details are quite basic at this level and include the item code, description, supplier, unit, price and an option to include a link to an image of the product.

6. Click the Add to Favourites button to add the selected item to your favourites list.
Free Form Items

A Free form item is an item manually added by the user. If you cannot find an item you are looking for you can create a free form item using the link on the All Items screen under the Catalogue tab.

**TIP**

Free Form Item – The more information added, the easier it will be for the buying department to resolve the item to a product in their catalogue.

**TIP**

Requisitioning services. Services are not normally held as items in the PowerGate Catalogue and therefore will not appear when searching for them. Instead, to requisition a service enter your requirements as a free-form service item. Please Note: Only users with Free-Form Requisitioning authority will be able to requisition free-form products or services.

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Adding a Free Form Item

1. **Before adding a free-form product or service to your shopping cart,** check that the transfer point you will requisition against is the correct one for this item. If it is not the correct transfer point then click My Profile and select the correct one.

2. **Click on the link to create a free form item.**

3. **Enter an Item Code and description.**

4. **Select the supplier by clicking on the button or key in the suppliers name manually.** Please note that any fields coloured blue are mandatory.

5. **Select the Account code by clicking on the button.** The account code is used to break up the products into categories.

6. **Select either Product or Service.** A Product is a physical item and a service is a person’s time, e.g. electrician, Plumber.

7. **Enter in a Unit, e.g. EACH, Box of 5, x1000.**

8. **Enter a Price and a Quantity and click on the button to add it to your shopping cart.**

9. **If you click on the link to the “1 Item” it will take you to your shopping cart.**
Shopping Lists

Shopping Lists can be found under the Catalogue tab next to All Items. Shopping Lists are either a catalogue of common items, i.e. stationary, or a top-up list. Users can only view shopping lists that they have been given access to. Different users have different access rights.

Shopping List screen

1. Click on the Shopping List tab under the main Catalogue tab.

2. Select a shopping list from the drop down list. The list will only display shopping lists that you have access to.

3. The shopping list items will be displayed. This screen has the same functionality as the All Items screen, so you are able to add items to your basket by entering a quantity and clicking on the Add to Basket button. If you do not enter a quantity then the default quantity is set to 1. You can also add an item to your favourites by clicking the button.

4. You can search for items in your Shopping List using the search bar at the top of the screen. Type in part of a description or item code (or part of the code/description) and click GO.

5. You can move from page to page using the navigation at the bottom of the screen.
Recent Items

The Recent Items screen can be located under the Catalogue tab. It is a catalogue of all the items that you have requisitioned over the past three months.

Each user is assigned to a work group, these work groups restrict what documents a certain group of users can see. In the Recent Items screen you can view the recent items of the work groups that you have access to by selecting a specific work group from the drop down list.

Recent Items screen

1. Click on the Recent Items tab under the main catalogue tab.

2. Your recent items will be displayed on the screen. If you would like to view the recent items from a specific work group, select a work group from the drop down list at the top of the screen.

3. Recent Items screen will be displayed. This screen has the same functionality as the All Items screen, so you are able to add items to your basket by entering a quantity and clicking on the Add to Basket button. If you do not enter a quantity then the default quantity is set to 1. You can also add an item to your favourites by clicking the favourite button.

4. You can search for items in your recent items list using the search bar at the top of the screen. Type in the item code or description (or part of the code/description) and click GO.
My Favourites

The My Favourites can be located under the Catalogue tab. My Favourites is a catalogue of items that you have chosen to add to this list because you are likely to requisition them frequently. This screen is specific to each user. The user manages their favourites using the button which is included on the All Items, Shopping List and Recent Items screens.

1. **Click on the My Favourites tab which is under the main Catalogue tab.**

2. A list of your favourite items will be displayed. From this screen you can add items to your shopping cart by entering a quantity and clicking the button. If you do not select a quantity it will be set to the default quantity of 1.

3. You can also delete items from your list using the button.

4. You can search for items in the My Favourites list using the search bar at the top of the screen. Type in the item code or description (or part of the code/description) and click GO.

**TIP**

Shopping Cart – the default quantity when adding an item is 1, so if you require 1 of the product in the list just click on the button without entering a quantity.
New Items

The New Items screen can be located under the Shopping Cart tab. It shows products that have been added to your shopping cart but haven’t been requested for approval. This screen is broken down by cost centre; the cost centre is displayed at the top of the page.

TIP
Amending free-form items. Free-form goods or service items can be amended in exactly the same way as non free-form items, by firstly clicking on the information button. However, in addition to being able to change the supplier, cost centre, quantity, etc., you can also change the item code, description, unit, and price.

New Items Screen

1. Click on the Shopping Cart tab, the first screen displayed on this tab is the New Items screen.
2. The shopping cart is split up by cost centre. Some users have the access rights to change the cost centre.
3. Click on the button to display additional details about the selected item. More detail is displayed compared to in the Catalogue tab, including more tabs. The General tab gives you the ability to change the quantity and enter a price. It also shows the Transfer Point and Cost Centre which you can change using the button. The Notes tab allows you to add in a message for the buying department (Memo section) and Supplier (Printed Notes).
4. If you click on the properties of a free form item then you will be able to edit most of the details. Free form items can be edited up until the point they are sent for approval.
5. The Audit tab shows the actions against the product. If you flag an item as Urgent then this will change the colour of the item in the New Items screen.
6. On the main screen the quantities can be changed. When you enter a quantity the green tick button will become available. Click on this button to update the item.
7. Click on the button to add a message for the approver stating the reason why they want to request the item. This is useful if an unusual item is being ordered for that cost centre.
8. To delete an item from the list use the button.

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New Items

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PowerGate will automatically determine the approval path to be taken when each item is requested. Approval paths vary depending on the requisitioner, the value of goods or services and any budget limits that may apply, and the type of product being requested. Only once an item has been approved can PowerGate create a requisition.

9 Select the tick box at the top of the screen or click on the Select All link to select all items for request. To select single products tick the box next to each items.

10 There is an option to enter a Reference before the request is sent, this is used for grouping items. If you enter the same reference next to lots of items then you will be able to group them in the Open Orders and Closed Orders by selecting the Reference as a Workgroup.

11 Click on Request Items to request the items for approval.

12 If a quantity turns yellow this indicates that you requested a quantity below the minimum value and PowerGate web has changed the value to meet this minimum. It’s the same situation if you select a quantity that is above the maximum value, the box will turn yellow and PowerGate web will change it so that it is within the maximum.

13 The minimum and maximum quantity limits can be set in PowerGate in the Supplier Properties under the Other tab.

14 You can view the minimum and maximum order quantity for an item by going into the item properties on the New Items screen.
Items Awaiting Approval

The Items Awaiting Approval screen can be located under the Shopping Cart tab. This screen shows all the items that have been sent for approval. It also shows an audit log of the activity related to each item.

TIP

INSERT TEXT

Items Awaiting Approval Screen

1. Click on the Shopping Cart tab and click on the Items Awaiting Approval tab.

2. Click on the button to display additional details about the selected item. This screen has 4 tabs; General Notes, for Approval By and Audit.

   The General tab shows all the details of the items, the details cannot be edited unless you are viewing a free form item where the price can be edited. The Notes tab allows you to add in a message for the buying department (Memo section) and Supplier (Printed Notes). The For Approval By tab shows which approver the item is to be approved by. The Audit tab shows the actions against the product.

3. If you need to edit the quantity of any of your items, click on the button. This will send the items for that cost centre back to the New Items screen for you to edit. Once you have edited the items you will need to request the items again.

4. If an item is marked as Urgent in the item properties on the New Items screen then the item will continue to show as yellow on the Items Awaiting Approval tab.

5. To delete an item click on the button. Please be aware that the items are grouped by cost centre and there is one delete button per cost centre, so by clicking on the button it would delete all the items listed under the cost centre.

   To delete single items it is best to send the items in the cost centre back to the New Items screen, delete the single item(s) and request the remaining items to send them back to the Items Awaiting Approval screen.
Open Orders

The Open Orders screen can be located under the Shopping Cart tab. This screen shows a list of all orders that have been requested but haven’t been received.

1. Click on the Shopping Cart tab and click on the Open Orders tab

2. You can choose to view open orders for a particular work group using the drop down list at the top of the page. The list will only display workgroups that you have access to.

3. You can choose to group your results by a certain field using the drop down list at the top of the page.
Closed Orders

The Closed Orders screen can be located under the Shopping Cart tab. This screen displays a history of orders that have been approved and have finished being processed. This screen will only show the last 200 orders to be closed.

1. Click on the Shopping Cart tab and click on the Closed Orders tab.

2. You can choose to view open orders for a particular work group using the drop down list at the top of the page. The list will only display workgroups that you have access to.

3. You can choose to group your results by a certain field using the drop down list at the top of the page.
Shopping

Shopping for items is simply a matter of searching for the required item and adding it to your shopping cart. Items that cannot be found in a catalogue, or services which are not normally added to the catalogue, can be added to your shopping cart as a free-form item.

TIP
Cannot find an item? If you are experiencing difficulty in finding an item that you have authority to, it may be because the word you are searching for is misspelled in the catalogue. Try searching with only part of your original search word by removing leading or trailing letters.

TIP
My Favourites. Non free-form items that you requisition frequently can be added to your favourites list by clicking on the Add to Favourites (+Fav) button.

TIP
Just the one. If you only require a quantity of one then do not enter a quantity at all. Simply clicking the shopping cart button, without entering a quantity first, will add the item to your shopping cart with a quantity of one.

Searching for Items

1. Enter a search word or words and click Go. Search words can be any text that appears in either the item code or description fields.

2. The first 200 items or 10 pages that match your search criteria are displayed in item description order.

3. The item you are looking for may not appear on the first page. Click Next or a page number to display items on that page.

4. An information message will be displayed if more than 200 items matched your search criteria. When this is displayed, it is advisable to refine your search criteria by adding additional search words.

5. Click the Information button to display additional details about the selected item.

6. Click the Add to favourite’s button to add the selected item to your favourites list.
Amending Items in Your Shopping Cart

1. Before requesting approval, you may want to amend one or more items. To amend a quantity, enter the new quantity and click the tick button to update.

2. To amend further details click the button.

3. Notes can be added as instructions to the supplier as they will print on the purchase order.

4. Clicking this button will allow you to change the preferred supplier. However, the final supplier selected may be overridden when your requisition item is converted into a purchase order by the buyer.

5. Clicking this button will allow you to change the cost centre for this item. Changing a cost centre may also change the approval path taken.

6. Finally, when all changes have been made click Submit to update this item.
My Profile

The My Profile screen allows you to change details about your PowerGate profile such as your telephone number, password, and default transfer point and cost centre used.

**TIP**

Changing defaults. Special authority is required to allow you to change some of your defaults. Users without this authority will not be able to change these settings.

1. Your telephone number can be viewed by others and therefore it is important that this is correct.

2. To change your password, enter your new password and confirm this by entering your new password a second time in the Confirm Password field.

3. Approval requests can be automatically forwarded to another user when you are unavailable to action them yourself e.g. If you are on holiday.

4. When adding an item to your shopping cart it will use the defaults shown here.

   You can change the default Work Group, Customer, Transfer Point and Cost Centre from this screen by clicking on the button.

5. Click the Submit button to save your changes.

6. Usage data, including orders not placed via remote requisitioning, can be extracted and loaded into Microsoft Excel via the Usage Export tab.
There are three types of approval that may be required for an item.

**Pre-Approval**
A requisitioner may require pre-approval of any requested items. i.e. a nurse may require pre-approval from the ward sister.

**Cost Centre Approval**
After any pre-approval has been granted an item may require budget (cost centre) approval where a predefined limit has been exceeded. This level of approval is financial approval; it can be split further based on price. When the approval is split by price each approver will have a price limit on what they can approve. The item will need to go through every approval level, even if it is known that it will need to be approved by the highest approver who can approve the request of the most expensive item. When this happens, items will stay in “awaiting Approval” status until the whole value has been approved.

**Account Level Approval**
Items may need Account Level Approval where the items account has been defined as requiring approval regardless of value i.e. personal computers.
Items Awaiting Approval

1. Requested items that require approval before they can be requisitioned will display on the Items Awaiting Approval tab.

2. The last approval message is displayed here. Clicking more..., when available, will display additional approval messages.

3. To see further details click the information button.

4. The name of the user who must approve your item before it is requisitioned is displayed on the For Approval By tab. If the user has their email address defined you will be able to email them by clicking on their name.
Authorisation

Pre-approvers, cost centre approvers, and account approvers will be required to approve requests for items.

TIP

Email Notification. An email notification message will automatically be sent to any approver that has items requiring approval and has an email address configured against their user profile.

Granting or Denying Approval

1. Click on the Authorisation tab to display any items that require your approval.

2. Grant or deny approval by selecting the relevant option.

3. When denying approval, click the text icon and enter your reason for denial.

4. Click Submit to complete the approval process.

5. System Administrators can approve items on behalf of any approver by selecting an approvers name from the list provided.
Order Status

Once an item has been approved, it will appear on the Order Status screen. Use this screen to track the status of your order and as a log of all outstanding requests.

TIP

Acknowledging the receipt of items. Acknowledging the receipt of items allows the purchasing and accounts payable departments to pay invoices promptly and therefore take advantage of any early settlement discounts on offer.

TIP

Item completion. Items will remain on the Open Orders screen until they have been fully receipted by purchasing or fully acknowledged by yourself.

Following the status of an Order

1. Once an item has been approved it will be allocated a requisition number, followed by an order number, and appear on the Order Status screen.

2. Click the information button to display the items properties.

3. The item properties screen will show you the name of the buyer who has taken responsibility for your order, any estimated delivery date and the date the order was released to the supplier. If the buyer has their email address defined you will be able to email them by clicking on their name.

4. Acknowledge the receipt of items by clicking the tick button.

5. Enter the Delivery Quantity and Delivery Note No. Entering an accurate Delivery Note Number helps ensure that the goods have not already been receipted. Finally, tick Final Delivery if no further deliveries of this item are expected.
This section explains the requisitioning process from start to finish. It will go through using each of the screens that have already been explained so you should have some understanding of how they work.
Step 1

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