

**Click path for Purchase Module**

# **NIMS eHMS**



**e-Sushrut 9-5**

*An Advanced Hospital Management Information System*

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## Purchase Module

### Click Path

#### **1. Purchase Demand Desk**

Click on Purchase → Services → Purchase Demand Desk

- Select the appropriate values in the drop down fields namely Store, Item Category, Request Type and Status.
- Click on the Generate button placed on the left hand side of the menu.
- From the drop down menu and text boxes, select/enter the relevant options for the drop down fields namely Demand Raise To, Group Name, Generic Name, Item Name, Quantity Request, Demand Year, Currency Name, Approx Rate (INR), Supplier Name, Purpose and Justification.
- After input of all mandatory fields, click on the Save Button.

#### **Save – Clear – Back Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Back → It will bring user back to the current sub module page.
- The Data saved would be visible in the Pending Status in the Purchase Demand Desk.

## 2. Approval Desk

Click on Purchase → Services → Approval Desk

- Select the appropriate values in the drop down fields namely Request Type and Status.
- Click on the check box corresponding to the record and there after click on Approval button.
- Enter the Approved Quantity against the Requested Quantity and select Unit Name from the drop down menu.
- Select Approval Status as Approved in the Radio Button and there after click on the Save Button.

### Save – Clear – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.
- The selected records get visible under Approved Status as shown in next Figure.

### 3. Proposal Desk

Click on Purchase → Services → Proposal Desk

- Select the appropriate values in the drop down fields namely Dept./Section/Store Name, Contract Type, Proposal Type and Status.
- Click on the Create button placed on the left hand side of the menu.
- Proposal for rate Contract Signing Desk would be auto filled as per the data input done in above step.
- Select appropriate values for the drop down fields namely Item Category and Procurement Mode.
- Currency Mode is fixed to Rs.
- Under Item Details header, select appropriate values for the drop down fields namely Group Name, Item Name, Unit Name and Proposed Manufacturer.
- Enter remaining fields of the section. Click on Add button to insert more Items in the Contract creation.
- Under Other Details header and Payment Mode Details header, select appropriate values for the drop down fields namely Proposal Period, Category Name, Purchase Department / Store Name, Payment Mode and Payment Terms. Enter remaining fields of the section.
- Click on the Save button to get confirmation message displayed on the screen.

#### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 4. Proposal Validation

Click on Purchase → Services → Validation

- Select relevant options in the drop down menu that was used to create Proposal.
- Under Pending Approval Details header, select created proposal by clicking on its relevant radio button.
- After selection, click on the Go button placed at the end of the records.
- Click on radio button to Approve or Reject the created proposal.
- Click on the Save button to get confirmation message displayed on the screen.

### Save – Clear – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

### 4a. Online Finance Concurrence

Click on Finance Management System → Services → Contingency → Online Finance Concurrence

- Enter the Request Number in the space provided and click on Search button.
- Click on the Approve Button against the Request raised.
- Confirmation message will be displayed to the user.

## 5. Enquiry Desk

Click on Purchase → Services → Enquiry Desk

- Select the appropriate option in the drop down menu to view the created record.
- Click on the Extend Date button placed at the left hand side of the table.
- Enter New Sale End Date, New Pre Bid Enquiry Date, New Submission Date and New Envelope Opening Date/Time details in the respective fields.
- Click on the Save button.

### Save – Clear – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.
  
- Click on Tender Open Process placed on left hand side of the menu.
- Please note that this option would be available when Tender Open process has been done which has been explained in Section 7 of Click path Document.
- Enquiry Desk Opening and Tender Details section would be auto filled by the application as per the data entered by the user during Tender creation process.
- Under Envelope Details header, click on the lock icon placed against Document Screening.
- Select the members present during Document Screening process by clicking on the relevant check boxes.
- Fill the mandatory fields on the page and click on the Save button.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.
  
- After Document Screening Price Bid screening need to be performed.
- Please note that this process will be done after Document Comparative Statement Approval. (Explained in Section 9 of the Click Path Document)
- Under Envelope Details header, click on the lock icon placed against Price Bid Screening.
- Select the members present during Price Bid process by clicking on the relevant check boxes.
- Fill the mandatory fields on the page and click on the Save button.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.



## 6. Tender / Quotation Validation

Click on Purchase → Services → Tender / Quotation Validation

- Select relevant option for the drop down fields namely Contract Type and Tender Type.
- Select the particular record by clicking on the relevant radio button.
- Click on the Go button.
- Click on the remaining tabs available on the page to view complete details about the particular tender process.
- Click on the Status radio button to approve/reject the selected tender.
- Click on Save button to complete the process.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 7. Sale Of Tender

Click on Purchase → Services → Sale Of Tender

- Select the particular Tender No. available in the drop down menu for Sale of Tender.
- Enter Sale Reference No in the space provided.
- Select Supplier, Payment Mode and Dispatch Mode from the drop down menu.
- Enter Instrument No, Instrument Date and Bank Name in the space provided.
- Click on Save button to complete the process.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 8. Document Screening Entry

Click on Purchase → Services → Document Screening Entry

- Select relevant option in the drop down fields namely Dept/Store Name and Tender/Quotation No to view the corresponding tender.
- Click to corresponding Tender available in the drop down.
- Under New Details header, select relevant options in the drop down field namely Supplier Name.
- Score of the Supplier, Supplier Type and Address would be auto generated on the page.
- Under Item/Component Quoted header select the items by clicking on the right side facing arrow button so as to move the selected item from left window to the right window.
- Repeat the process of adding more than one supplier name against the Tender created from New Details header.

### Save – Final – Clear – Delete – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Final → All the Saved Data on the process would be Freezed. Further Modification is not allowed once Final Save is done.
- Clear → Clear Window will erase all the records present on the fields.
- Delete → User can delete the Screened Document due to incompleteness of the Document or Requirement not meeting.
- Cancel → User will return to the main menu of the current sub module.

## 9. Document Comparative Statement Approval

Click on Purchase → Services → Document Comparative Statement Approval

- Select the Relevant option in the drop down fields namely Contract Type and Tender/Quotation No
- Click to corresponding Tender/Quotation No available in the drop down.
- Under Quoted Suppliers Details header, click on the tick mark symbol top view detail about individual supplier.
- User can thus check the Approval Status and Qualify or Disqualify the selected supplier.
- Click on the Document Details against the Supplier Name.
- Any uploaded document would be uploaded over here and visible in this section.
- Click on the Save button to view the confirmation message displayed on the screen.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 10. Price Bid Entry

Click on Purchase → Services → Price Bid Entry

- Select the Relevant option in the drop down fields namely Contract Type and Tender/Quotation No.
- Click to corresponding Tender/Quotation No available in the drop down menu.
- Tender Details and Previous Price Bid Entry details if any would be visible on the page automatically.
- Under Price Bid Entry Details header, For each of the supplier create corresponding component.
- Enter the Supplier's Rate in the application.
- Entering all the details of Price against respective Supplier.

### **Save – Final – Clear – Delete – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Final Save → All the Saved Data on the process would be Freezed. Further Modification is not allowed once Final Save is done.
- Clear → Clear Window will erase all the records present on the fields.
- Delete → User can delete the Screened Document due to incompleteness of the Document or Requirement not meeting.
- Cancel → User will return to the main menu of the current sub module.

## 11. Price Bid Comparative Statement Approval

Click on Purchase → Services → Price Bid Comparative Statement Approval

- Select the Relevant option in the drop down fields namely Contract Type and Tender/Quotation No.
- Click to corresponding Tender/Quotation No available in the drop down.
- Tender Details and Previous Price Bid Entry details if any would be visible on the page automatically.
- Under Item Wise Comparative Chart Preparation, select Item/Component from the drop down menu.
- Set the priority of the Supplier under Status.
- Select relevant option like L1, L2 and L3 etc to set the precedence of the supplier.
- Click on the Save and then Final Save Button.
- In case Negotiation is required for the price being quoted then the user has to click the checkbox.
- Enabling of the checkbox would lead to the data reflection as explained in Section namely Negotiation Entry and Negotiation Comparative Statement Approval.

### Save – Final – Clear – Delete – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Final Save → All the Saved Data on the process would be Freezed. Further Modification is not allowed once Final Save is done.
- Clear → Clear Window will erase all the records present on the fields.
- Delete → User can delete the Screened Document due to incompleteness of the Document or Requirement not meeting.
- Cancel → User will return to the main menu of the current sub module.

## 12. Negotiation Entry

Click on Purchase → Services → Negotiation Entry

- Select the Relevant option in the drop down fields namely Contract Type and Tender/Quotation No.
- Select the Supplier Name and Item/Component Name from the drop down menu.
- Click on the Manufacturer Name. Following page would appear on the screen.
- Enter the Negotiated Value in the space provided.
- Click on the Save Button.
- After the Negotiation done on each component, click on Final Save button.

### **Save – Final – Clear – Delete – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Final Save → All the Saved Data on the process would be Freezed. Further Modification is not allowed once Final Save is done.
- Clear → Clear Window will erase all the records present on the fields.
- Delete → User can delete the Screened Document due to incompleteness of the Document or Requirement not meeting.
- Cancel → User will return to the main menu of the current sub module.

### 13. Negotiation Comparative Statement Approval

Click on Purchase → Services → Negotiation Comparative Statement Approval

- Select Contract Type and Tender/Quotation No from the drop down menu.
- Select Item/Component Name from the drop down menu.
- After selection of Item/Component Name, select the status corresponding to the record selected.
- Select the Status (Qualified/Disqualified) from the drop down menu.
- Click on Save Button to get conformation message displayed on the screen.

#### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.



## 14. Liability Booking Detail

Click on Purchase → Services → Liability Booking Detail

- Select the Relevant option in the drop down fields namely Contract Type and Liability Type.
- Under Liability Request Details header, select the corresponding record to which Liability Booking Detail is to be created.
- Select the Radio Button in case Expenditure is booked (Yes/No)
- Enter the Booked Amount and Booking No in the space provided.
- Enter File/Page No in the space provided.
- Click on the Save button to get confirmation message displayed on the screen.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 15. PO Desk

Click on Purchase → Services → PO Desk

- Select Store Name and Status from the drop down menu.
- Click on Generate Button on the left hand side of the page.
- Select Contract Type and proposal number from the drop down menu.
- Select Supplier Name from the drop down menu.
- Enter the Delivery Date and select Delivery Location from the drop down menu.
- Click on Save Button to get confirmation message displayed on the screen.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 16. PO Approval

Click on Purchase → Services → PO Approval

- Select Contract Type and PO No from the drop down menu.
- Select Radio Button for the Schedule and select Status from the drop down menu.
- Click on Save Button to get confirmation message displayed on the screen.

### Save – Clear – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.
  
- In order to get PO Print user needs to Generate FC Number. User needs to follow the following path: Finance Management System -> Contingency -> Online Finance Concurrence.
- Enter the PO No in the space provided and click on Search Button.
- Click on Generate FC Number.
- Confirmation message would be displayed on the screen.
- After FC has been generated, Click on Print button on left hand side of the PO Desk menu.

## 17. Rate Contract Desk

Click on Purchase → Services → Rate Contract Desk

- For the PO Generated, Rate Contract Details would be available on the following Path of the application: Inventory -> Order Management -> Rate Contract Details.
- Click on the Add Button on the left hand side of the menu.
- Enter Date for Contract From and Contract To from the calendar.
- Enter Tender No, Tender Date. Click on Item Finder button to add the drug.
- Enter Rate/Unit, Quantity, Tax and Shelf Life in the space provided.
- Click on the Save Button to get conformation message displayed on the screen.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 18. Award Letter

Click on Purchase → Services → Award Letter

- Select the Relevant option in the drop down fields namely Store Name and Status.
- Click on Generate button placed at left hand side of the menu.
- Select appropriate Contract type for which Award Letter is to be created.
- Select Supplier Name from the drop down menu.
- Enter Delivery Date and Reference Date from the calendar in the space provided.
- Enter Order Quantity against the Finalized Quantity.
- Click on the Save button to get confirmation message displayed on the screen.

### **Save – Clear – Cancel Button**

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.
  
- Click on the Print Button placed on the Left hand side to Print the Award Letter.
- Click on the Agreement Letter Button placed on the Left hand side to Generate Agreement Letter.

## 19. Emd/Pbg Refund/Forfeit Request

Click on Purchase → Services → Emd/Pbg Refund/Forfeit Request

- Select the Relevant option in the drop down fields namely Contract Type and Mode.
- Select the Radio Button against the record through which Request needs to be raised.
- Enter the Remarks in the space provided.
- Click on the Save button to get Confirmation message displayed on the screen

### Save – Clear – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.

## 20. Emd/Pbg Desk

Click on Purchase → Services → Emd/Pbg Desk

- Select the Relevant option in the drop down fields namely Dept/Store Name and Contract Type through which refund request was raised as explained in Section 19.
- Click on the Relevant Record whose refund is to be initiated.
- Click on Refund Button placed on the left hand side of the screen.
- Select Refund Mode from the drop down menu.
- Click on the Save button to get Confirmation message displayed on the screen

### Save – Clear – Cancel Button

- Save → By clicking the Save button, entered data on the page will be saved.
- Clear → Clear Window will erase all the records present on the fields.
- Cancel → User will return to the main menu of the current sub module.