

Create and Submit a Requisition

Use this function to:

- Process an order for a service provider
- Submit an order to the Bio Depot
- Process an order for a sub-plant

Have the following ready:

- Name of the Holding Point that is requesting product
- The immunizing agent of the product (e.g., HB, Td, Var, etc.) and the quantity requested (in Doses)

Steps

1. Logon to Panorama
2. Select the **Inventory tab**
3. Go to the left-hand navigation and click on **Manage Requisitions** under **Product Requisitions**. The Manage Requisitions screen will display
4. **Search** for the requisition to ensure it doesn't exist
 - Identify the **Ship To Holding Point** (the HP that is requesting product)
 - Enter other search criteria if needed; leave the rest blank for a more open search (recommended)
 - Click **Search**
 - Search results will be displayed with requisitions that match your search criteria.
 - Click on the **Requisition ID** to view details for Requisitions that are already in the system
5. If there is no duplicate Requisition, click **Create Requisition**
6. Review the details for the Create New Requisition screen: **Note: only necessary information is presented**
 - Ship To HP: Should be already populated with the HP that is requesting product, if not, click Search and search and add the HP
 - Requestor Requisition Date: System will populate
 - Ship-to Address: System will populate
 - Bill-to Address: System will populate
 - Required Delivery: leave as Next scheduled
 - Preferred Delivery Method: System will populate
 - Requestor Contact Name: System will populate
 - Ship From Holding Point: System will populate; if product is coming from another replenishment source, then use drop-down to change
 - Comments: If required, enter comment about the requisition (e.g. if order is usually picked up at a pick-up location (Transit Point))
7. **Save** the Requisition. System will display a message indicating that the Requisition has been saved.



Panorama Quick Reference Sheet



8. Click **Add Catalogue Item(s)** (only enabled after saving). **Catalogue Item Information** page will display.
9. **Search** for the product(s) requested
 - Use an open search to find the products, or use Alternate ID or Level drop-downs to narrow down the search
 - In the display results table, check off the product(s) that is being requested,
 - Click **Add Catalogue Item(s)**
 - System will return to the requisition screen
10. Under the **Requisition Summary View** section, enter the quantity requested for each line item.
11. If submitting the Requisition now, click **Submit Requisition**. Otherwise, Save.