



Value Proposition Document Healthcare Materials Management (HMM) Requisition Portal.



Overview.

The HMM Requisition Portal is designed to streamline the materials requisition process within healthcare organizations by providing a seamless and efficient platform for users to request stock and non-stock items. The portal integrates with Business Central, ensuring real-time tracking and enhanced control over procurement activities.

Key Features and Functionalities.

1. Registration and Login

- User Registration
- User Login
- Login with Azure Active Directory (AAD) for seamless integration with corporate systems.
- Password Management
 - Secure Forgot/Reset Password functionality.
- User Access Control
 - A Super User in Business Central can assign and manage access to different portal modules and locations for portal users.

2. Requisition Requests

- Item Requests for Stock and Non-Stock Locations
 - Users can request items via Supply Requisition's "Transfer and Expense Preview" documents in Business Central.

- Replenishment Locations.
 - Users can request items for locations from outside vendors when replenishment locations are not defined using the "Purchase Requisition" document.
- Inventory and Special Order Items (GL Account)
 - Users can request inventory items and special order items (GL Account).
 - GL Account items are treated as special-order items in Business Central's Purchase Orders.
 - Purchase Requisition documents will be created in Business Central for special-order items.
- Requisition Creation and Upload.
 - Create Supply/Purchase Requisition documents directly in Business Central.
 - Upload requisition requests to the portal for review before processing.
- Save and Modify Requisitions.
 - Users can save, review, and modify requisitions before submission to Business Central.
- Item Search Functionality.
 - Search items by Item Description, Item Reference Number, and Vendor Item Number while creating Requisitions.

3. Requisition Requests List.

- Requisition Overview
 - View all saved and submitted requisition requests.
- Modify/Delete Saved Requisitions.
 - Modify or delete requisitions in a saved state.
- Copy Requisition Lines
 - Copy requisition lines to create new requests.
- Search and Filter Requisitions.
 - Search by Request ID, Transaction Type, Request Date, Item No, Description, From/To Location, and Item Reference.
- Sorting Functionality
 - Sort requisition data for easy access.

4. Templates.

- Define templates with frequently used items and locations.
- Assign templates to user groups.
- Create requisitions using templates.
- Copy existing templates to create new ones.

5. Archived Requisitions.

- Move processed requisition requests to the Archived section.
- View archived requisition requests.

6. Approval Workflow.

- Define Approval Hierarchy based on:
 - Stock/Non-Stock Items
 - Departments (Dimensions)
 - Special Order Items
- Approval Request Process.
 - Approval requests will be generated in Business Central for Requisitions requested through portal.

How the Requisition Portal Differs from the Handheld Portal.

Feature.	Requisition Portal.	Handheld Portal.
Purpose.	Request materials for stock/non-stock locations	Inventory management functionalities including request materials, transfer, return, picking etc.
Special Order Items.	Supports ordering special order items (GL Account)	Only supports inventory items
Viewing Requests.	Users can view submitted/processed requests to Business Central	Submitted requests cannot be viewed

Additional Functionalities.	Focused on requisition process only	Supports additional functionalities like: • Transfers using Supply Transfer module • Issuance using Issuing module • Returns using Supply Returns • Picking against Supply Requisition Items • Receiving Purchase Order Items
Physical Inventory Count.	Not supported	Supported
Template Support.	Allows creation of templates with frequently used items and locations and using them to create requisitions.	Not supported
Copying Past Requests.	Users can create new requisitions by copying data from previously processed requests.	Not supported
Approval Workflow.	Send approval requests for Requisition documents considering the approval hierarchy in Business Central.	No approval workflow functionality



Conclusion.

The HMM Requisition Portal is an essential tool for streamlining the requisition process within healthcare organizations. By integrating with Business Central, the portal enhances efficiency, ensures compliance with procurement workflows, and offers key functionalities that differentiate it from the Handheld Portal. With its user-friendly interface, templates, and support for both inventory and special-order items, the HMM Requisition Portal is designed to optimize materials management and improve overall operational efficiency.