User Manual

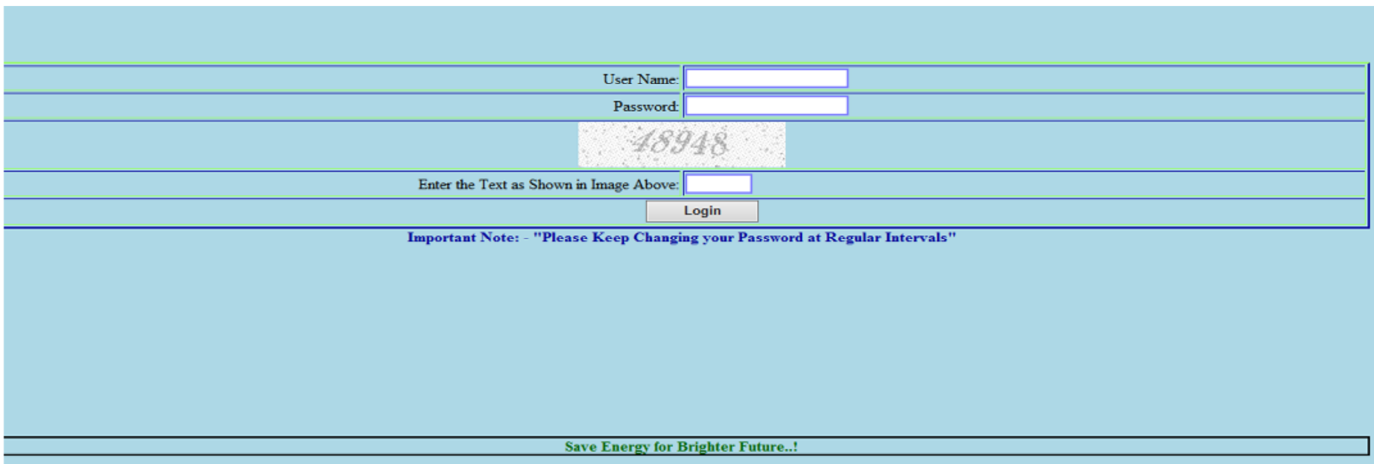
Inventory Management System

Please use Internet Explorer 8.0 or above for best use and make following settings in the internet explorer:

a. Open Internet Explorer, Click on Tools Menu>>Internet Options
b. Now Click on Privacy tab, open popup blocker settings.
c. In the address of the website to allow, type the url link provided to you, click on add button and close the window.
d. Again, click on the Tools Menu>>Compatibility View Settings & add the url link as done previously and then close the window.

- Open the Website/ url link as provided to you.
- The following screen will appear.

Login Page



1. Enter the user name and password as provided to you.
2. Enter the 5 digit number as shown in the picture and click on the login button.

Type of Users & their Roles in the Software

1. Administrator
2. Head Office (e.g.: Chief General Manager & other Head Office Users)
3. Superintending Engineer (SE) at Circle Level
4. Executive Engineer (EE) at Division Level
5. Sub-Divisional Engineer (SDE) at Sub-Division Level
6. Store Munshi (SM) at the Store Level

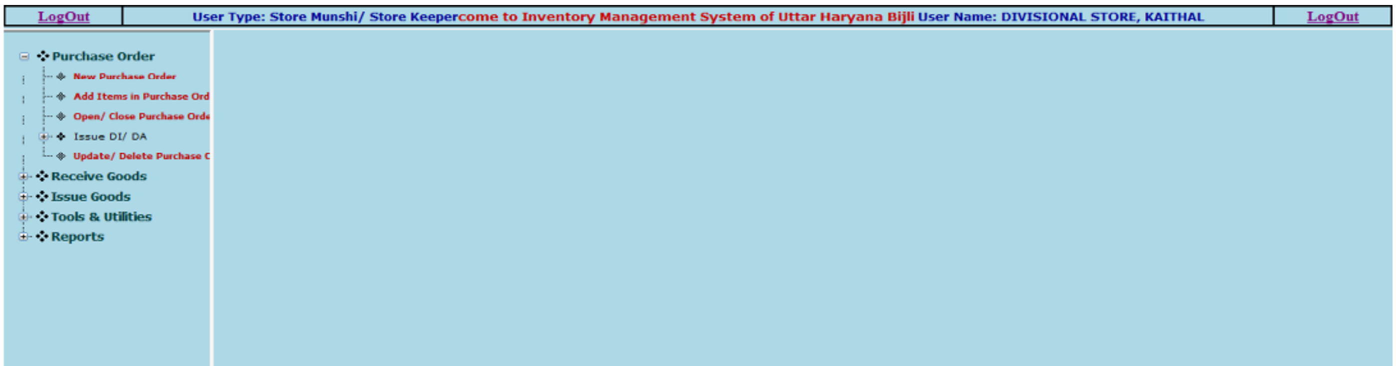
Role of each user is defined as under: -

1. **Administrator:** For activities like Managing of Masters like Addition of New Offices (Circle/ Division/ Sub-Division/ Stores) and other admin level activities.
2. **Head Office:** Entry of P.O.'s (Purchase Orders), Allocation of Quantities in DI/ DA to the consignee and for viewing various MIS reports at head office level etc.
   Note: - Purchase Orders which are done by head office will be entered by the head office only. There is no need to enter these PO's by the Circle/ Division/ Sub-Division/ Store.

3. **Superintending Engineer:** For Entry of Various Estimates/ PO's (for local purchases)/ Viewing Reports.
4. **Executive Engineer:** For Entry of Various Estimates/ PO's (for local purchases)/ Viewing Reports.
5. **Sub-Divisional Engineer:** For Entry of Various Estimates/ PO's (for local purchases)/ Viewing Reports.
6. **Store Munshi:** Every Transaction (i.e. any quantity in or out) in the store will be done by the store munshi. The process for making transactions is explained as under: -

<u>Main/ Menu Page after Login</u> (Store Munshi)

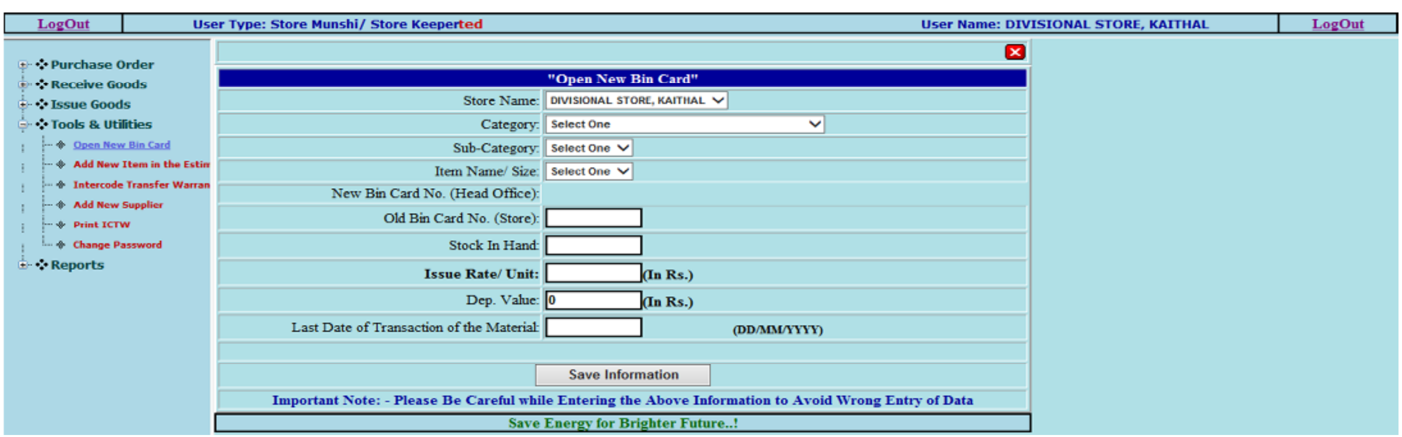
1. After Login the following page will appear.



2. At the top of the page, the system shows the User Type, User Name with which you are logged in and logout button, on the Left side of the page is the menu (like purchase orders, receive goods etc.).
3. The menu page also contains sub-menus like (New Purchase Order under Purchase Order Menu), to open the sub-menu, you can click on the name of menu option or on the '+' sign of the menu.

<u>Opening of New Stock Card/ Bin Card</u>

First of all you have to open all the Stock Cards/ Bin Cards in the software i.e. enter the material available in the store on a particular date. (**Important:** This is a onetime process). The steps for opening bin card are as follows:



1. To Open the Bin Card, Open the Tools Menu>> Click on **Open New Bin Card** option.
2. Select the Category, sub-category and name of item, the system will show the centralized bin card number of that item assigned by the software, then fill the bin card number of that item in your store,

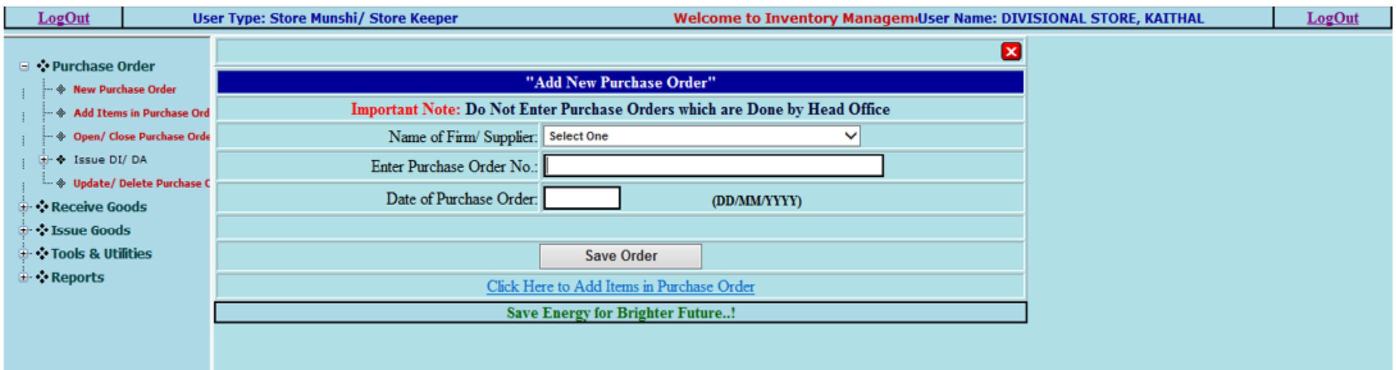
stock in hand, issue rate/ unit in Rs. of that item, depreciation value and Last date of Transaction of that item on the manual bin card.

3. Now, Click on the Save Information Button, the system will display the message for successful entry.
4. Similarly, open the bin card of all the items available in the store one by one.

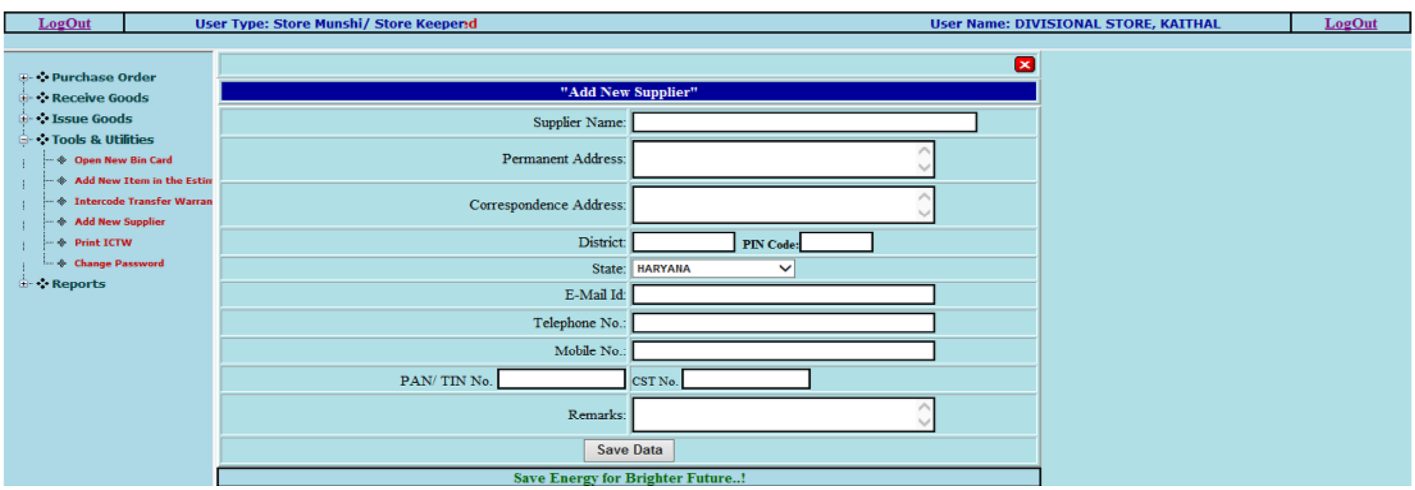
Important Note: - After opening the bin card in the online system, all the transactions on that item will be done only through online system, so that no transactions are missing on the Bin card.

Entry of Purchase Orders (P.O.'s)

Purchase Orders that are done by Head Office, will be done by Head Office Only. The purchase orders which are done at the SE/ EE/ SDE/ Store level, will be entered by the concerned office login.

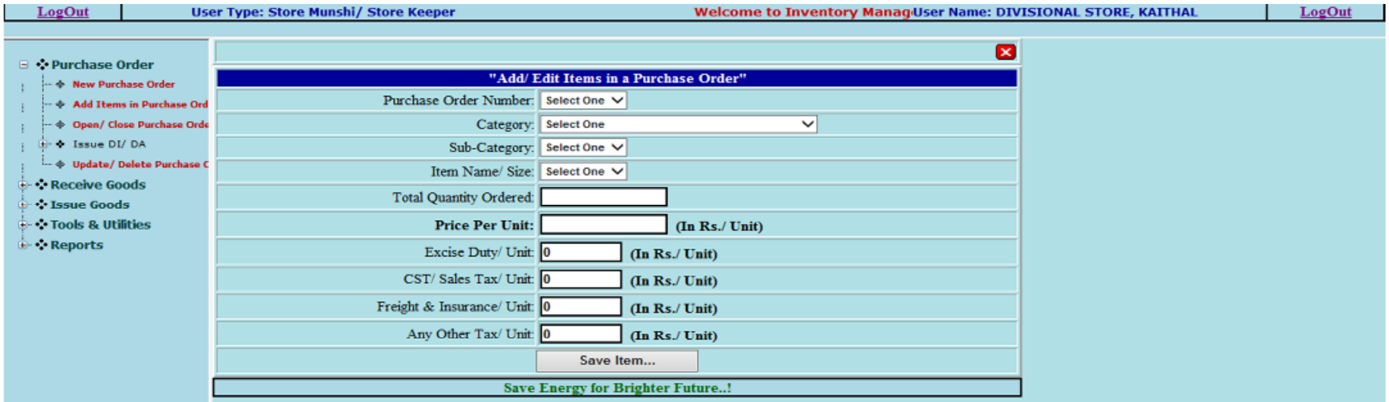


1. To add new Purchase Order Open the Purchase Order Menu>> Click on **New Purchase Order** option.
2. Select the Name of Supplier/ Firm; Enter Purchase Order Number and Date of Purchase Order.
3. If the Supplier/ Firm name is not available, it can be added from Tools & Utilities Menu>> Click on **Add New Supplier** option, fill & save the Supplier information as shown below:



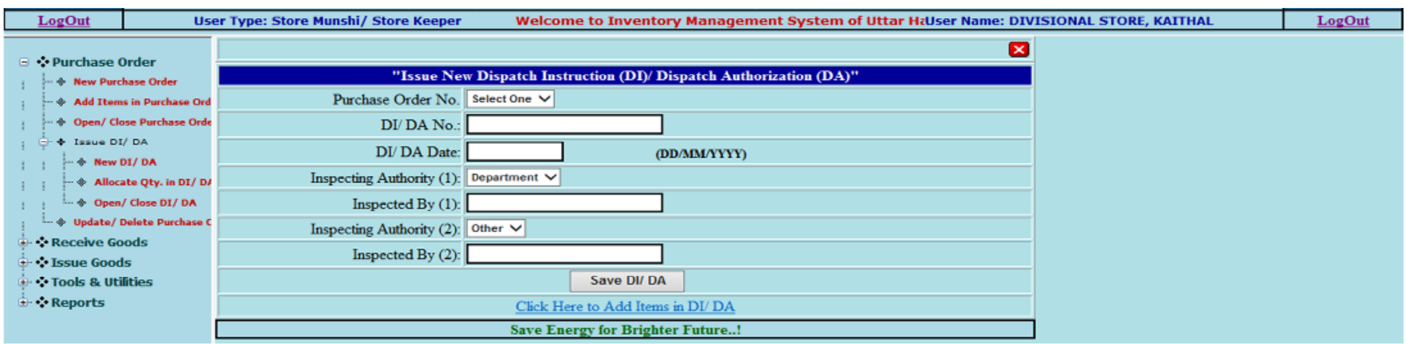
4. After adding the Purchase Order, you have to add items in the Purchase Order, Open the Purchase Order Menu>> Click on **Add Items in Purchase Order** option.
5. Select the Purchase Order Number; Select the Category/ Sub-Category/ Name of Item to be added, Enter Quantity to be ordered, price per unit, excise duty, CST/ Sales Tax, Freight & Insurance, Any other taxes (if any). **Note: - All the rates must be entered in Rs.**

6. Click on the Save Item button to save the Item. Repeat the above Step (Step No. 5) to add all the items in the purchase order one by one. Following screen shot shows how to add items in purchase order: -

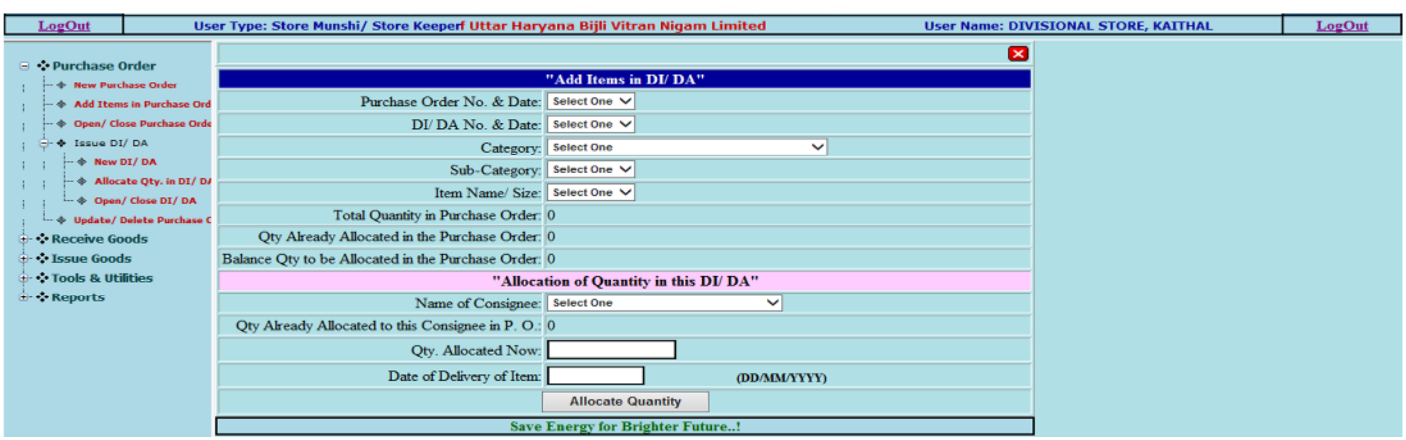


Till now we have not defined the name of the Consignee Store in which the quantity is to be received, Following are the steps for Entering/ Issuing New Dispatch Instruction (DI/ DA) and allocating the quantity in that DI/ DA: -

1. Open the Purchase Order Menu>> Open Issue DI/ DA Sub-Menu>> Click on **New DI/ DA** option, following screen will appear.

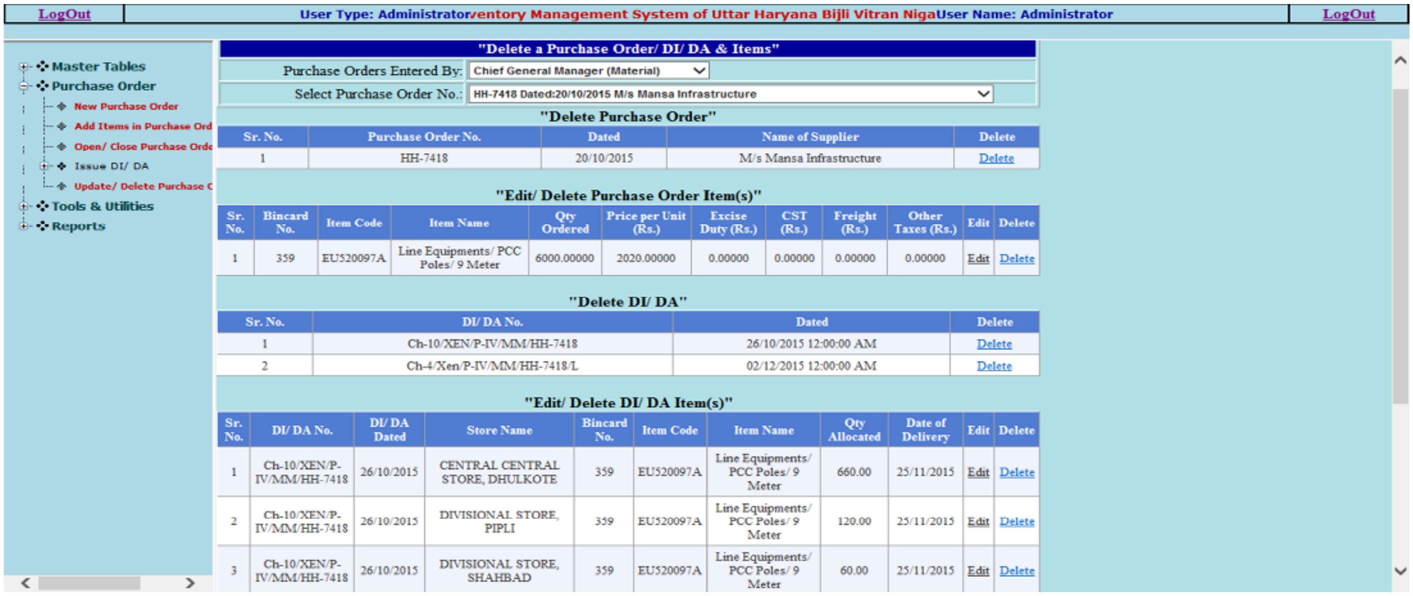


2. Select the Purchase Order Number for which DI/ DA being issued and fill the above form completely and save.
3. After that we need to allocate the quantity in DI/ DA, as there may be multiple DI/ DA in a Purchase Order. So Open the Purchase Order Menu>>Issue DI/ DA Sub-Menu>> Click on **Allocate Qty. in DI/ DA** option. Following screen will appear.



4. Fill the information and save for allocating quantity in DI/ DA.
5. After that the Material can be received in the Store.

Any wrong entry in Purchase Order and DI/ DA can be corrected by using the **Update/ Delete Purchase Order/ DI/ DA** option (You can edit/ delete any wrong entry using this option) under Purchase Order Menu as shown below:



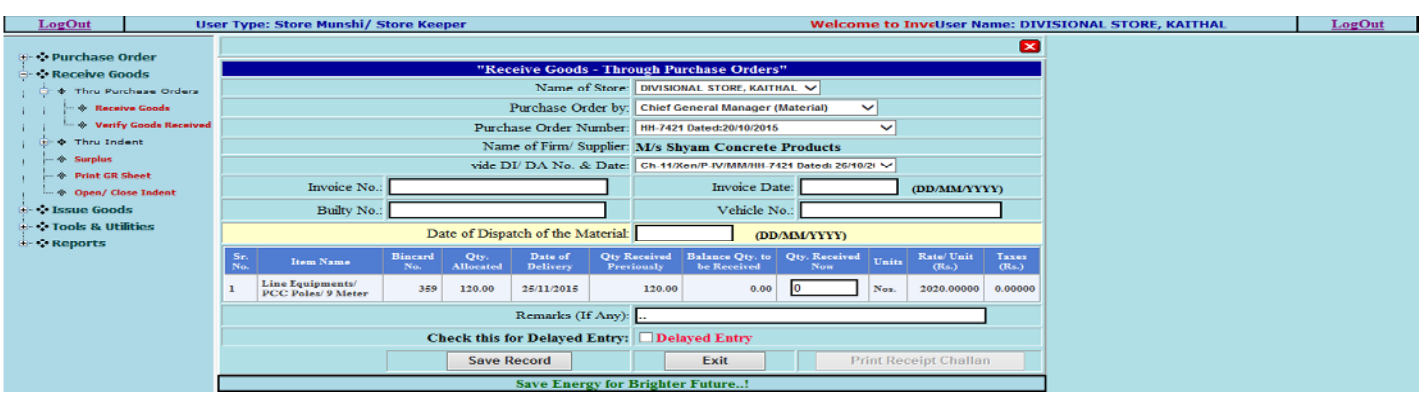
Receiving Material in the Store

Material can be received in the store by two ways:

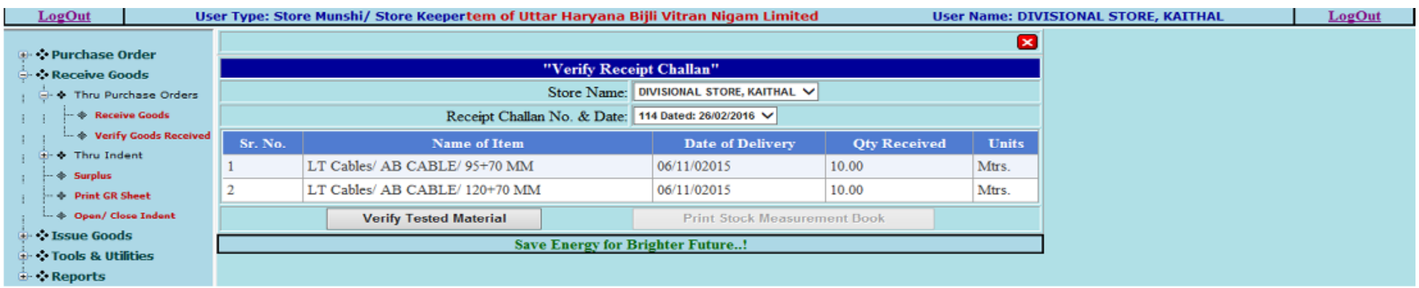
1. Through Purchase Orders
2. Through Indent/ Store Requisition/ Challan, it can be from
    a. Any Other Store
    b. Any Work
    c. Any Firm/ Supplier (after some repairs etc.)

Receiving Material through Purchase orders:

1. To receive the material from PO, Open the Receive Goods Menu>> Open Sub-Menu Thru Purchase Orders>> Click on **Receive Goods** option, following screen will appear: -



2. Select Purchase Order Number, DI/ DA No., the details of items in this DI/DA will be shown, like material ordered, date of delivery, quantity received previously and balance quantity to be received.
3. Enter the quantity to be received now (that may be in parts) and save the record, system will display a message with a unique receipt number and date.
4. If you are entering the data of a previous date (e.g.: you have manually received the material but not received it in the online system), then select the option of delayed entry. Enter the manual receipt number & date and save the record.
5. After saving the Record Print Receipt Challan button will be enabled, click on this button to print Receipt Challan.
6. The entry of the material on the stock card will be shown after the testing/ verification of the material received. To verify the material, Open the Receive Goods Menu>>Thru Purchase Order Sub-Menu>> Click on **Verify Goods Received** option, following screen will appear: -

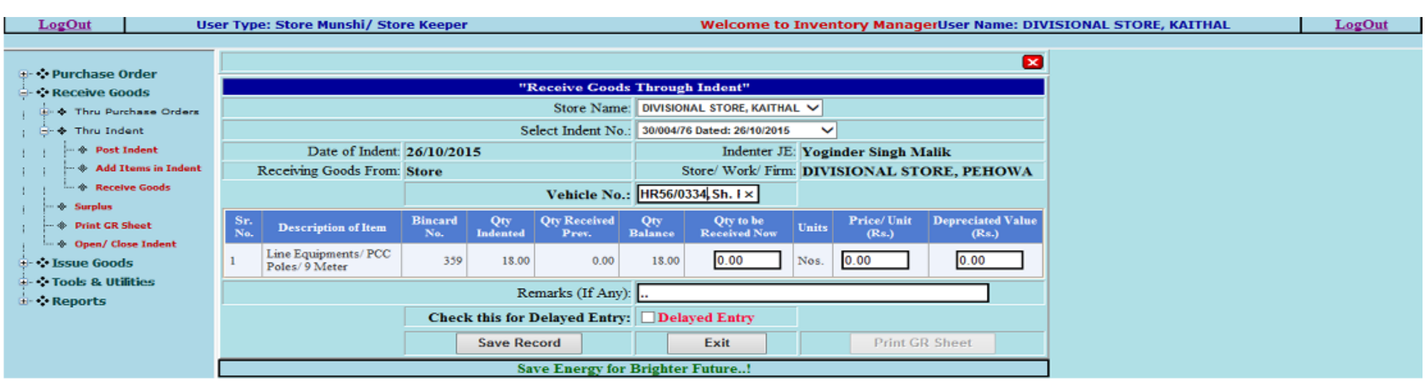


7. Select the Receipt Challan No. & date, and click on Verify Tested Material button. After that Print Stock Measurement Book button (SMB) will be enabled. Click on this button to print SMB.

<u>Receiving Material through Indent/ Store Requisition/ Challan</u>:

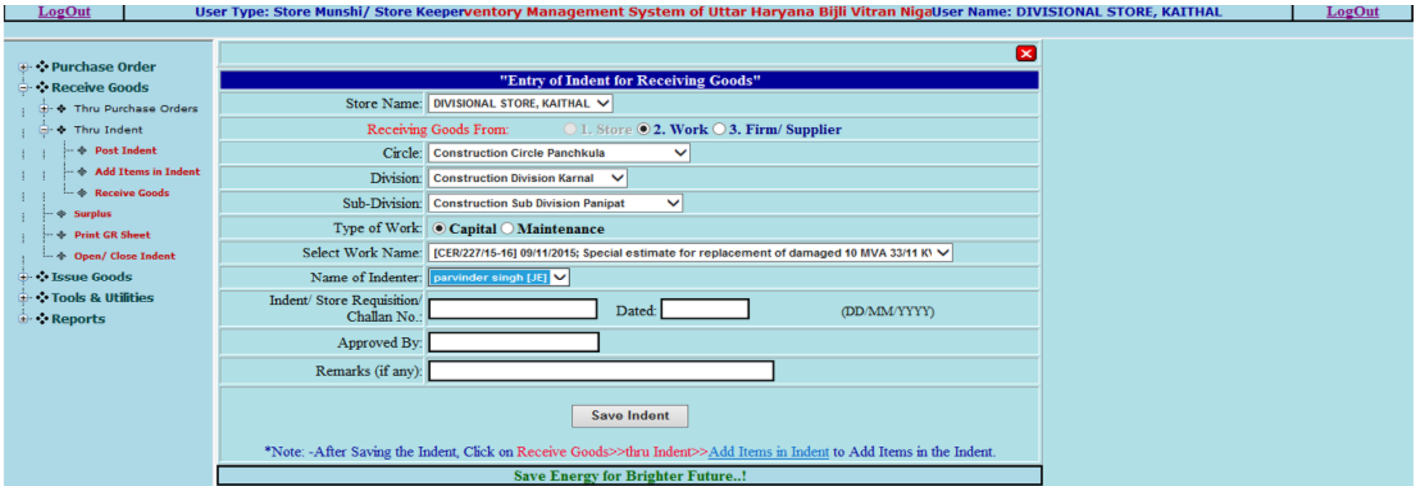
1. To receive the material though store indent, Open Receive Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.
2. Select the option of **Receiving Goods From**, there are three options
    a. Store
    b. Work
    c. Firm/ Supplier

<u>Store</u>: For receiving the material from other store, **there is no need to make an entry in Post Indent and Add Items in Indent option, as this entry will be automatically done when the material is issued from the issuing store**. Go to the option **Receive Goods** under Receive Goods Menu>> Thru Indent Sub-Menu.

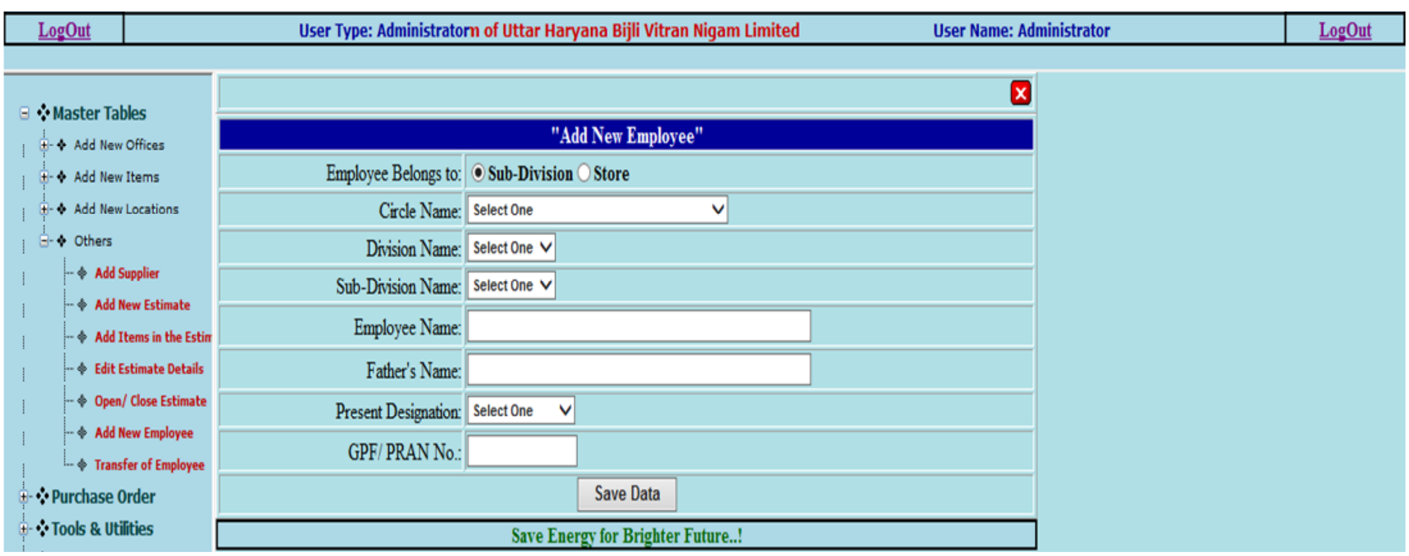


Select the Indent No. on which the material has been issued by the concerned store, the following screen will appear with prefilled data. Enter the quantity of material to be received and save the record. After saving the record, you can take the printout of Goods Receipt.

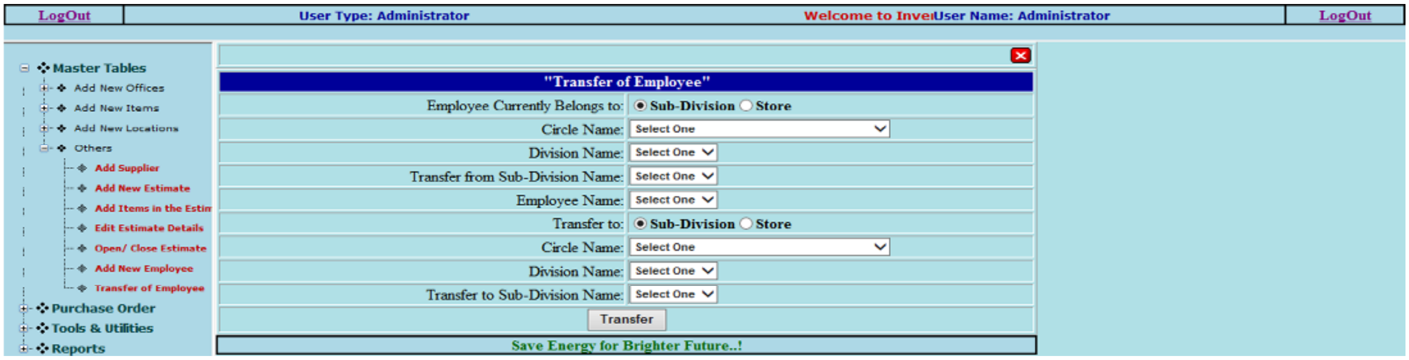
Work: For receiving the material from work, Open the Receive Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.



1. Select the **Work** Option, Name of Circle/ Division/ Sub-Division, Type of Work and Name of Work.
2. Select Name of Indenting Person, enter Store Indent/ Requisition/ Challan No., date, approved by and remarks (if any) & Save.
3. The Name of Indenting Person (JE/ JE-I/ AFM/ In-charge) can be added from Head Office/ Administrator Login Only. Field Official can request their Head Office to add the same.
4. To add the Official, Login from Administrator/ Head Office login, Click on Master Tables Menu>> Others Sub-Menu>> Click on **Add New Employee** Option, following screen will appear, Fill all the details in the above screen and click on Save Data Button.

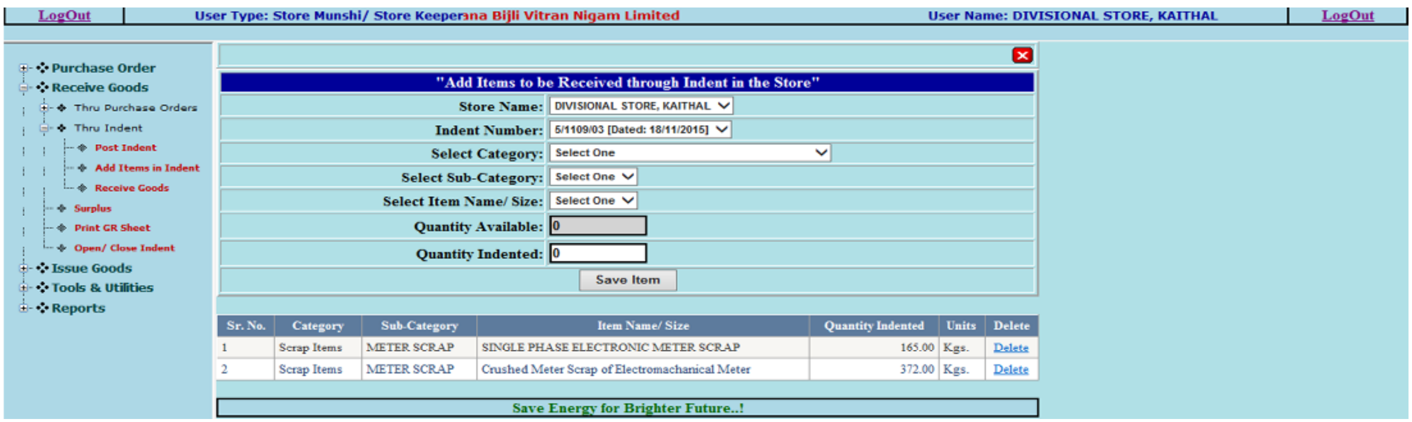


5. In case of transfer of any Employee, Open the Master Tables Menu>> Others Sub-Menu>> Click on **Transfer of Employee** option, fill all the details in the screen as shown below to transfer the employee. It can also be done only from Head Office/ Administrator Login.



After completion of **Post Indent** step, you need to add items in the indent, which can be added as follows:

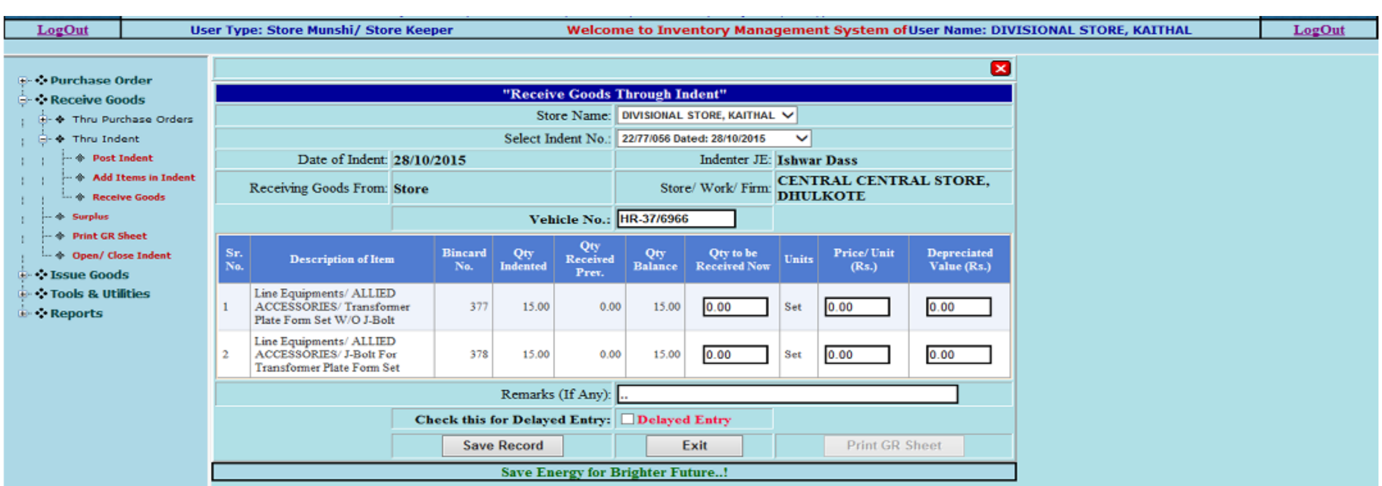
1. Open Receive Goods Menu>> Thru Indent Sub-Menu>> Click on **Add Items in Indent** option, following screen will appear.



2. Select the Indent No. you entered in the earlier screen (Post Indent screen), Select the Category/ Sub-Category/ Name of Item, Quantity to be received and click on Save Item Button.
3. Add all the items to be received from the work one by one.
4. Item already Added in the Indent will be shown in the list; you can edit/ delete any wrong entry.

Now you can receive the items back from any work as explained below.

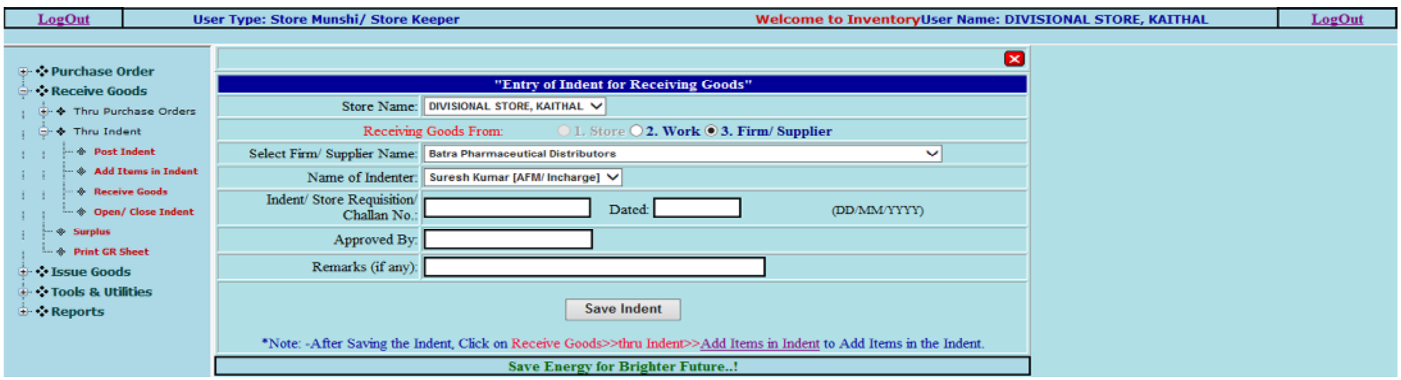
1. Open the Receive Goods Menu>> Thru Indent Sub-Menu>> Click on **Receive Goods** option.



2. Select the Indent No., the form will be filled automatically, Enter the quantity to be received, price per unit (In Rs.), Depreciation Value (In Rs.) of each Item & Click on Save Record Button. After saving the record, Print GR Sheet Button will be enabled, click on this button to print Goods Received Sheet.
3. Indent will be closed automatically after receiving the complete quantity in the Indent. However, if you want to close it before receiving the whole quantity, it can be done from Receive Goods Menu>> Thru Indent Sub-Menu>> by clicking on the **Open/ Close Indent.**

<u>Firm/ Supplier</u>: For receiving the material from any firm/ supplier, Open the Receive Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.

1. Select **Firm/ Supplier** Option, Select Name of Firm/ Supplier.

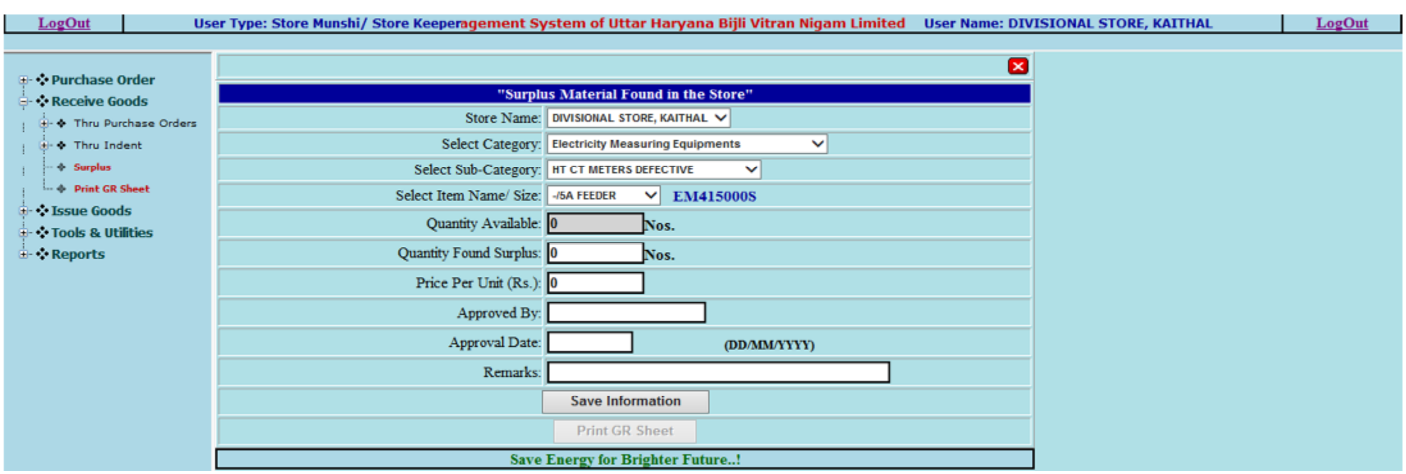


2. Select Name of Indenting Person; Enter Store Indent/ Requisition/ Challan No. & Date, Approved by and Click on Save Indent Button.
3. **Add Items in Indent** process is same as explained above (From Work).
4. **Receive Goods** process is also same as explained above (From Work).

Note: - All the Entries in the Stock Card/ Bin Card will be made automatically when you Receive the goods from the Store.

Sometimes during physical verification of the stock, some items are found extra, these are called as **Surplus items**, and these are to be taken on the stock card. The process for doing the same is explained below:

1. Open Receive Goods Menu>> Click on **Surplus** option, following screen will be displayed.



2. Select the Category/ Sub-Category/ Name of Item found Surplus in the store, fill the other details and click on Save Information button.
3. Click on the Print GR Sheet button to print the Goods Received Sheet.

Note: - You may also need to print any old SMB/ GR Sheet; it can be done using the Print GR Sheet option in Receive Goods Menu. Enter the SMB/ Receipt Challan Number and Click on the Print Button.

X-------------X-----------X--- The Process of Receiving Goods is Complete Now ---X-------------X------------X

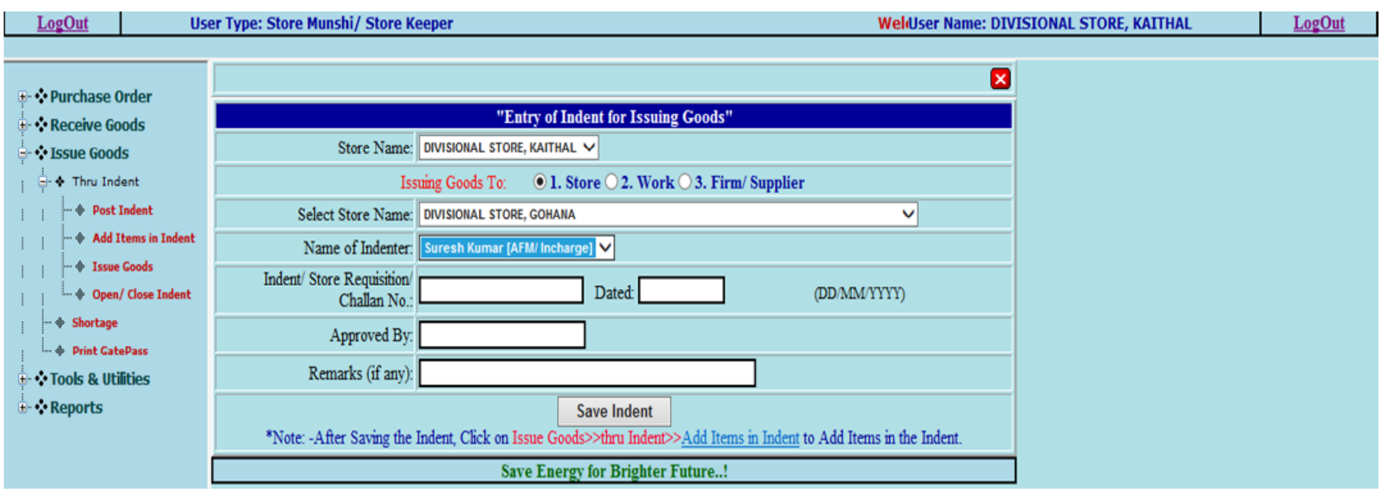
Issuing Material from the Store

Material can be issued from the store thru Indent/ Store Requisition/ Challan Only:

Issuing Material through Indent/ Store Requisition/ Challan:

1. To issue the material though store indent, Open Issue Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.
2. Select the option of **Issuing Goods To**, there are three options
   a. Store
   b. Work
   c. Firm/ Supplier

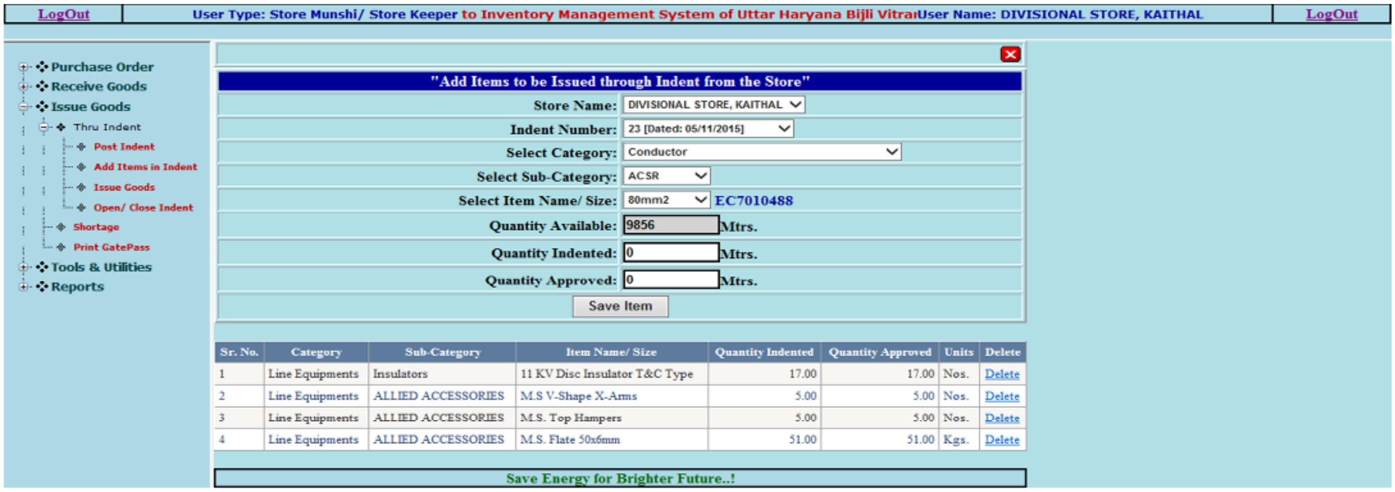
Store: For issuing the material to any store, Open the Issue Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.



1. Select the **Store** Option, list of all stores will appear and select the Name of the Store to whom material is being issued.
2. Select Name of Indenting Person, enter Store Indent/ Requisition/ Challan No., date, approved by and remarks (if any) & Save.
3. The Name of Indenting Person (JE/ JE-I/ AFM/ In-charge) can be added from Head Office/ Administrator Login Only (explained above). Field Official can request their Head Office to add.

After completion of **Post Indent** step, you need to add items in the indent, which can be added as follows:

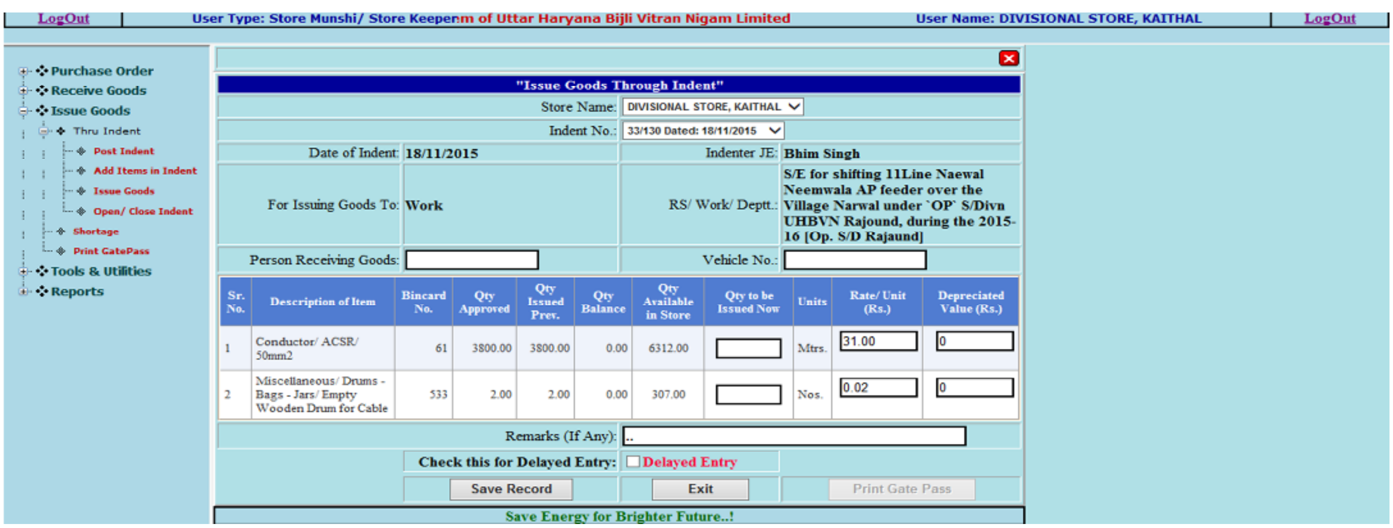
1. Open Issue Goods Menu>> Thru Indent Sub-Menu>> Click on **Add Items in Indent** option, following screen will appear.



2. Select the Indent No. you entered in the earlier screen (Post Indent screen), Select the Category/ Sub-Category/ Name of Item, Quantity indented (demanded), and quantity approved, click on Save Item Button.
3. Add all the items to be issued from the work one by one.
4. Item already Added in the Indent will be shown in the list; you can edit/ delete any wrong entry.

Now you can issue the goods to any store as explained below.

1. Open the Issue Goods Menu>> Thru Indent Sub-Menu>> Click on **Issue Goods** option.

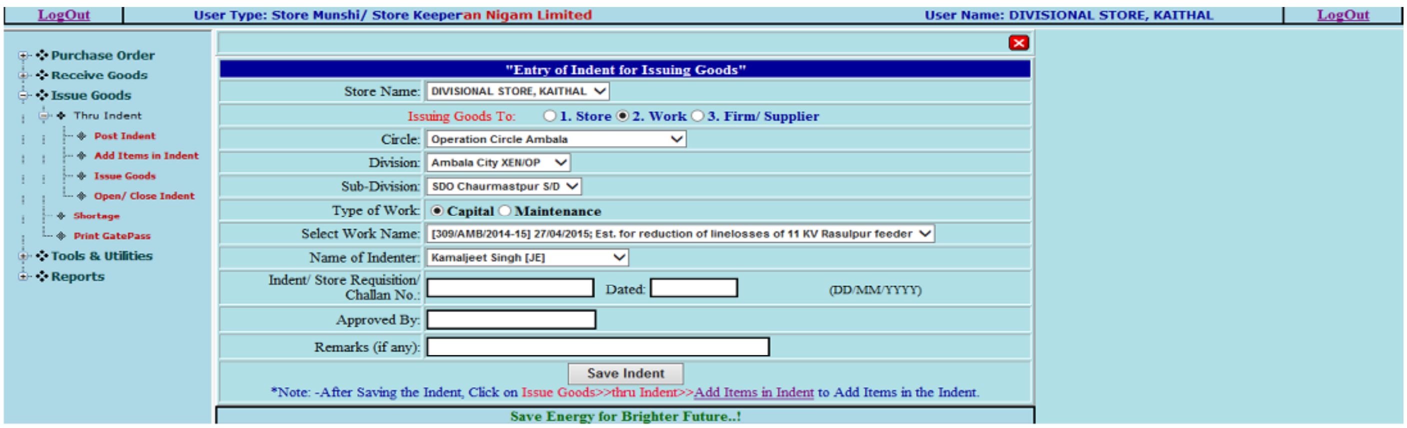


2. Select the Indent No., the form will be filled automatically, Enter the quantity to be issued, price per unit (In Rs.), Depreciation Value (In Rs.) of each Item & Click on Save Record Button. After saving the record, Print Gatepass Button will be enabled, click on this button to print Gatepass.

3. Indent will be closed automatically after issuing the complete quantity in the Indent. However, if you want to close it before issuing the whole quantity, it can be done from Issue Goods Menu>> Thru Indent Sub-Menu>> by clicking on the **Open/ Close Indent.**

Work: For issuing the material to any work, Open the Issue Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.

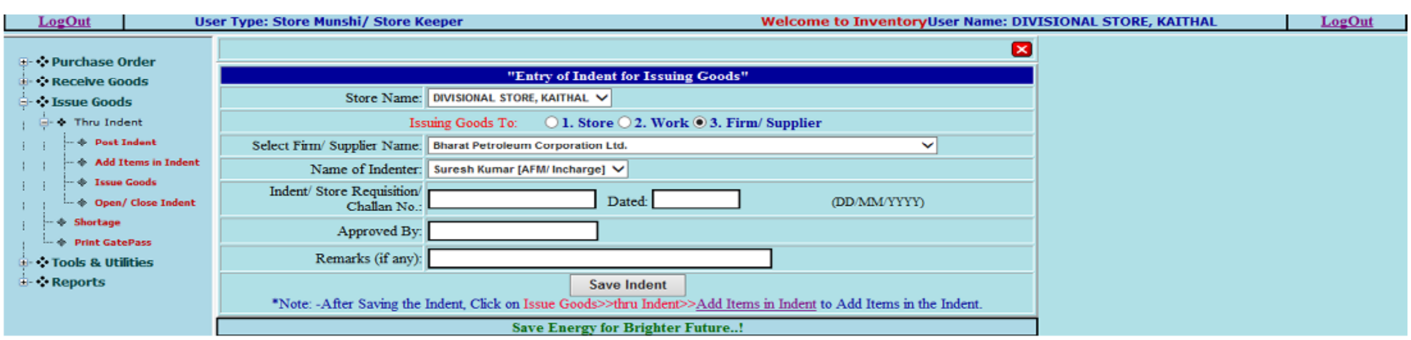
1. Select the **Work** Option, Name of Circle/ Division/ Sub-Division, Type of Work and Name of Work.
2. Select Name of Indenting Person, enter Store Indent/ Requisition/ Challan No., date, approved by and remarks (if any) & Save, as shown below:



3. **Add Items in Indent** process is same as explained above (From Store).
4. **Issue Goods** process is also same as explained above (From Store).

Firm/ Supplier: For issuing the material to any firm/ supplier, Open the Issue Goods Menu>>Thru Indent Sub-Menu>> Click on **Post Indent** option.

1. Select **Firm/ Supplier** Option, Select Name of Firm/ Supplier.

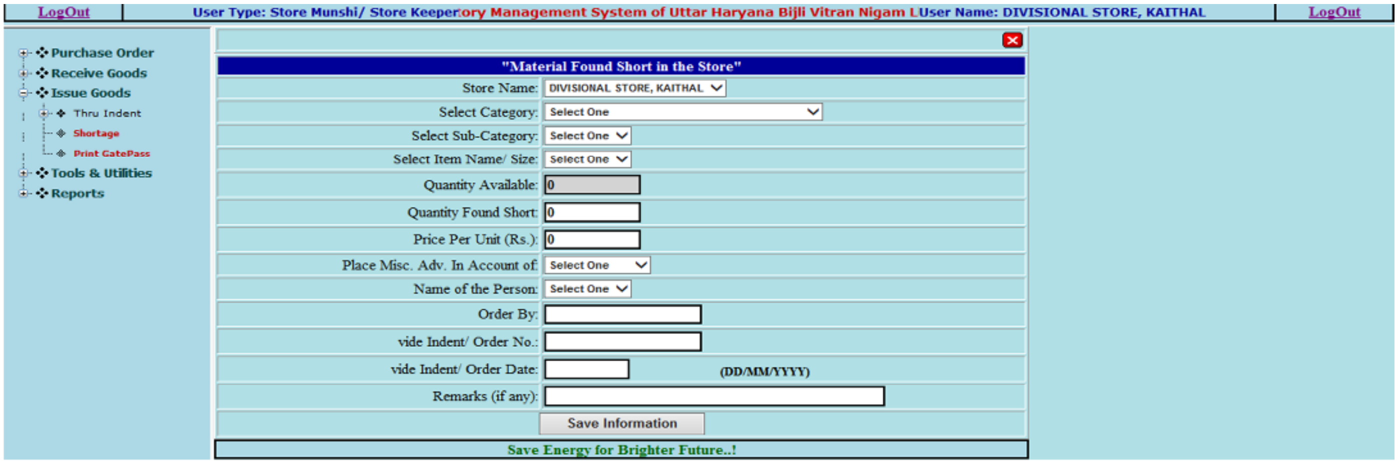


2. Select Name of Indenting Person; Enter Store Indent/ Requisition/ Challan No. & Date, Approved by and Click on Save Indent Button.
3. **Add Items in Indent** process is same as explained above (From Store).
4. **Issue Goods** process is also same as explained above (From Store).

Note: - All the Entries in the Stock Card/ Bin Card will be made automatically when you Issue the goods from the Store.

Sometimes during physical verification of the stock, some items are **Found Short**, and these are to be taken on the stock card. The process for doing the same is explained below:

1. Open Issue Goods Menu>> Click on **Shortage** option, following screen will be displayed.



2. Select the Category/ Sub-Category/ Name of Item found Short in the store, fill the other details and click on Save Information button.

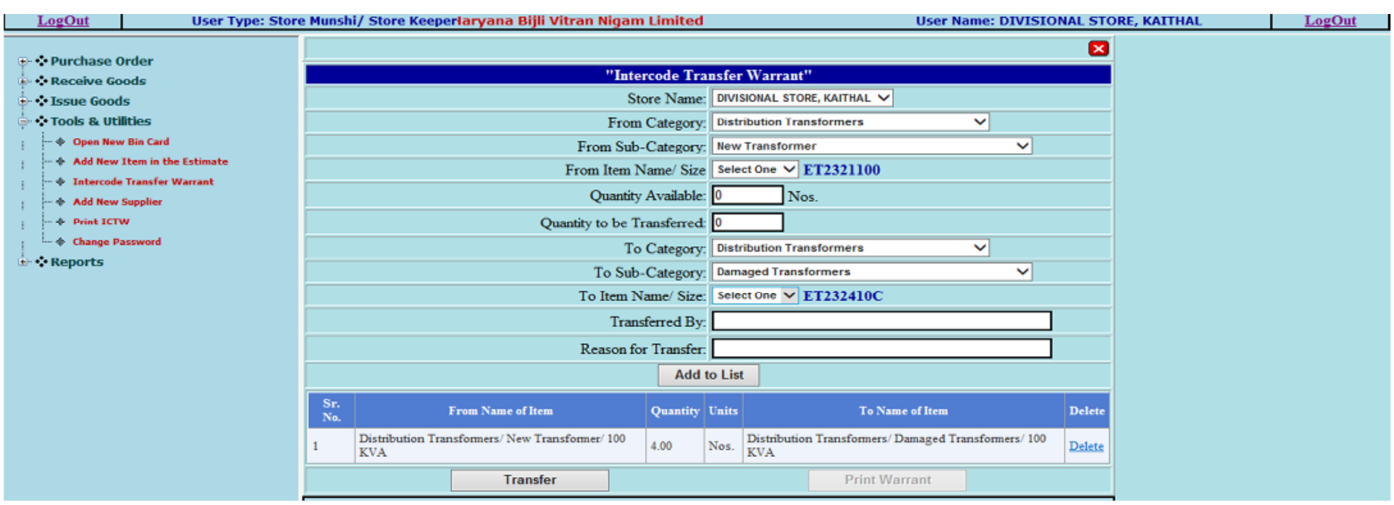
Note: - You may also need to print any old Gatepass; it can be done using the Print Gatepass option in Issue Goods Menu. Enter the Gatepass Number and Click on the Print Button.

X-------------X-----------X--- The Process of Issuing the Goods is Complete Now ---X-------------X------------X

Intercode Transfer Warrant

To transfer the Data from one stock card to another stock card (e.g.: from untested material to tested material and convert to scrap etc.), we use the option of intercode transfer warrant.

1. Go to Tools & Utilities>> Click on **Intercode Transfer Warrant** option, following screen will appear:

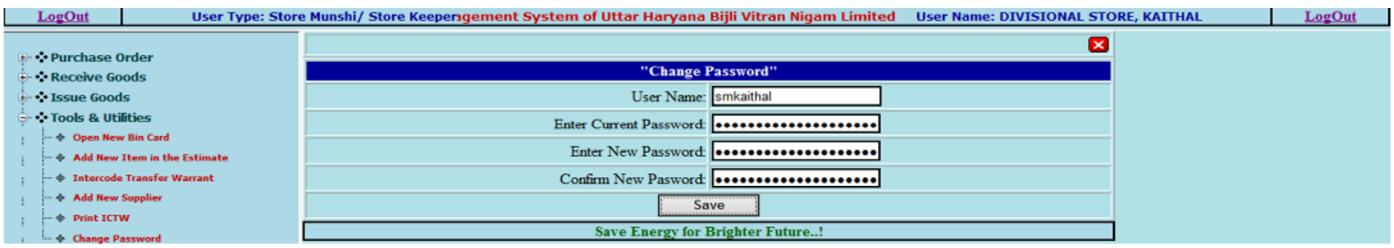


2. Select the Category/ Sub-Category/ Name of Item from which the material is to be transferred, and Enter Quantity to be transferred.
3. Again Select the Category/ Sub-Category/ Name of Item to which the material is to be transferred, and enter other details and click on Add to List button.
4. Create a list of items to be transferred from one stock card to another; you can also delete any wrong entry made in the list before clicking on the transfer button.
5. After adding all the items click on the transfer button. The items will be transferred, and Print Warrant button will get enabled automatically, Click on this button to print Intercode Transfer Warrant.

Note: You can also take a print of any previous intercode transfer warrant by click on the Tools & Utilities Menu>> Print ICTW option.

Change Password

It is recommended to keep changing your password at regular intervals. To change your password, Open the Tools & Utilities Menu>> Click on **Change Password** option:



1. Enter your current password.
2. New Password, and Confirm new password again.
3. Click on the Save Button, your password will be changed.

Reports

Various Reports are available under the Reports Menu. You can view/ print the reports as and when required. Selection Criteria is given for each report, you will have to select that criteria before getting the report. Most of the Reports can be opened on Word/ Excel/ Pdf format. A screenshot of **Reports Menu** available till date is attached herewith. However, the new reports will be available in the Reports Menu as per the requirements.

Thanks