



Tekla EPM 2019

Manage requisitions and purchase orders

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1 Set up the Purchasing module

The **Purchasing** module in Tekla EPM consists of two parts: requisitions and purchase orders. Before starting to use **Purchasing**, we recommend that you adjust the requisition and purchase order properties to meet the needs of your company.

For more information, see the following links:

[Define the requisition settings \(page 5\)](#)

[Define the purchase order settings \(page 12\)](#)

[Create, modify, or delete cost codes \(page 25\)](#)

1.1 Define the requisition settings

Before you start to use the **Purchasing** module, you need to separately define the default settings and options used for requisitions and purchase orders.

For more information, see the following links:

[Define company standard settings for requisitions \(page 5\)](#)

[View, print, or export global requisition reports \(page 9\)](#)

[Manage requisition jobs \(page 11\)](#)

Define company standard settings for requisitions

In the **Requisition Company Standards** dialog box, you can create default settings that become the company standard settings used in all future requisitions. If necessary, you can change the settings for each individual requisition.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Requisitions --> Company Standards**.

3. In the **Requisition Company Standards** dialog box, adjust the settings according to your needs:

Option	Description
Requisition # Increment	<p>Allows you to select the default option for automatic numbering of requisitions. The options are:</p> <ul style="list-style-type: none"> • Increment from Last Requisition #: When you create a new requisition, Tekla EPM uses the next available number after the latest requisition number created. • Increment from Largest Requisition #: Tekla EPM uses the next available number after the largest requisition number created. • Don't Increment: Automatic numbering is not used. <p>You can modify the requisition number when you create a new requisition.</p>
Item Increment	<p>Sets the auto-increment for item numbers.</p> <p>The auto-increment allows the items to be added in the list according to your needs, without having to renumber the other items in the requisition.</p> <p>For example, if items should be numbered as 10, 20, 30, ..., the input increment should be set to 10. If the auto-increment of the item numbers is not necessary, type 1 in the Item Increment field.</p>
Keep Purchasing Selection Screen Open	<p>When selected, the Select Requisition/Purchase Order dialog box stays open after a requisition has been opened. Otherwise, the Select Requisition/Purchase Order dialog box will close when you open a requisition.</p>
Job # Regular Expression	<p>Allows the use of regular expressions to create the requisition number.</p> <p>For more detailed instructions on the job number regular expressions, click Regular Expression Help.</p>

4. Click **Save**.

The changes you made are saved. You can further modify the company standards by clicking the **Input/Display Units**, **Combining Optimizations**, and **Suppliers** buttons.

See also

[Define default input and display units for requisitions \(page 7\)](#)

[Define combining optimizations for requisitions \(page 7\)](#)

[Define suppliers for requisitions \(page 9\)](#)

Define default input and display units for requisitions

You can use either metric or imperial units for displaying and entering sizes, lengths, weights, and prices in requisitions. In addition, you can select how you want to enter the data for the length of the piece.

1. In the **Requisition Company Standards** dialog box, click the **Input/Display Units** button.
2. In the **Input/Display Units** dialog box, click the arrows on the right side of the fields to select the units and the length input type.

Note that there are multiple options depending on the required precision and the desired input method.

3. Click **OK**.
4. Remember to click **Save** in the **Requisition Company Standards** dialog box to update the input and display units.

When the settings are saved, the **Requisition Company Standards** dialog box closes.

Define combining optimizations for requisitions

You can define company-level settings for multing and plate nesting for new requisitions. If necessary, the combining optimizations can be adjusted for each individual requisition.

1. At the bottom of the **Requisition Company Standards** dialog box, click **Combining Optimizations**.
2. To use material grade substitutions with the optimization settings when performing a combining run, on the **General Settings** tab of the **Combining Setup** dialog box, select the **Use Grade Substitutions** check box.

Grade substitutions must be set in the **Shape / Grade / Size Maintenance** dialog box. If the grade substitutions are not set, the material grades in the combining run and in the supplier pricing data set or the inventory need to match each other exactly.

3. If you only want to mult and nest materials that are in the same sequence, select the **Combine Only Within Sequence** check box.

Selecting the **Combine Only Within Sequence** check box might be useful in medium or big jobs, but we do not recommend selecting it for small jobs.

4. Click the arrow buttons to move the optimization options that you want to use to the **Optimizations Included** list.

The options are:

- **Inventory Exact-Match (In Stock):** Use this option for inventory items in stock that are an exact match without the use of kerf or clamp allowance.
- **Inventory Exact-Match (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that are an exact match without the use of kerf or clamp allowance.
- **Inventory Least-Scrap (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that will provide the least amount of scrap.
- **Inventory Least-Scrap (In Stock):** Use this option for inventory items in stock that will provide the least amount of scrap.
- **Warehouse Least-Scrap:** Use this option to give preference to warehouse items that will provide the least amount of scrap. Warehouse items will only be used when they provide less scrap than the available inventory items.
- **Warehouse Force Inventory:** Use this option to force the use of inventory regardless of the amount of scrap, no matter where it is located in the **Optimizations Included** list. This option is the opposite of **Warehouse Least-Scrap**.

Note that you can only include **Warehouse Least-Scrap** or **Warehouse Force Inventory**, not both.

5. Use the **Move Up** and **Move Down** buttons to modify the order of the optimizations.

The order is important while performing a combining run.

6. Click the **Mult Settings - Linear Material** tab to open it.
7. In **Multing Software**, select the multing software that you are using.
8. If you want to apply the material kerf settings defined in **Shape / Grade / Size Maintenance** to the combining as part of the cutting pattern, select the **Apply Kerf** check box.
9. Open the **Plate Nesting Settings** tab.
10. In the **Plate Nesting Software** list, click the plate nesting software that you are using to select it.
11. In the **Shear Cut Optimization** list, click a suitable shear cut option to select it.

The selected option determines the plate allowance to be used with the combining:

- Use **None** when cutting plate on a burn table.

- Use **Shear Cut - First Cut Along Length** or **Shear Cut - First Cut Along Width** to alert Tekla EPM that the nesting needs to allow for that type of cut first. Then, the nesting will allow for all subsequent cuts to be made with that condition.
12. If the material grain direction is unimportant and you want Tekla EPM to create the best possible optimization of a plate, select the **Rotate Plates for Best Fit** check box.
 13. If necessary, select the **Apply Kerf** check box.
See step 8.
 14. Click **Save**.
 15. Remember to click **Save** in the **Requisition Company Standards** dialog box to update the combining optimizations.

When the settings are saved, the **Requisition Company Standards** dialog box closes.

Define suppliers for requisitions

You can define the desired suppliers, or pricing data sets, for angles, beams, plates, rods, tubes, and other material. This way, you can use material pricing from the selected supplier pricing data sets for each material group.

1. In the **Requisition Company Standards** dialog box, click the **Suppliers** button.
2. In the **Suppliers** dialog box, click the arrows on the right side of the material group lists, and select the suppliers.
3. Click **OK**.
4. Remember to click **Save** in the **Requisition Company Standards** dialog box to update the supplier settings.

When the settings are saved, the **Requisition Company Standards** dialog box closes.

View, print, or export global requisition reports

Use the **Reports** command under **Maintenance --> Requisitions** to create reports that include information from all or several requisitions jobs. The available reports include requests for pricing and various lists of requisitions. You can then either view or print a report, or export a report and save it in another file format.

To create requisition reports, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Requisitions --> Reports**.

3. To only include specific requisitions in the reports, in the **Requisition Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the requisition properties that you want to include in the reports to the **Included** list.
 - Type the maximum and minimum values for the requisition properties that you want to include in the reports.
5. Click **OK**.

To further limit the requisitions included in the reports, repeat steps 3 to 5 for all filter types.
6. Click **Make Report**.
7. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

To change the reports that are displayed in the **Report Selection** dialog box, click **Edit Report Types**.

According to your needs, see any of the following instructions:

View the requisition report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the requisition report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the selected report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the requisition report

1. Click **Export**.
2. In the **Export Format** list, select an export format.

3. Click **Browse**.
4. Modify the file name according to your needs.
5. Browse to the location where you want to save the exported file, and click **Save**.
6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

Manage requisition jobs

In **Job Maintenance**, you can delete or copy existing requisitions.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Requisitions --> Requisition Maintenance**.
3. In the **Job Maintenance** dialog box, select one of the available options to manage the existing requisitions:
 - **Delete Requisitions**
 - **Copy Requisition**

See also

[Copy a requisition \(page 11\)](#)

[Delete requisitions \(page 11\)](#)

Delete requisitions

You can delete unnecessary requisitions at any time in **Job Maintenance**.

1. In the **Job Maintenance** dialog box, select the **Delete Requisitions** option.
2. In the list, select the requisition that you want to delete.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
3. At the bottom of the dialog box, click **Delete**.
4. To delete the requisition, click **Yes** in the confirmation dialog box.

Copy a requisition

You can copy a requisition to use it as the base of a new similar requisition. Copying a requisition makes creating the new requisition quicker, as you do not have to set all properties manually or create items one by one.

1. In the **Job Maintenance** dialog box, select the **Copy Requisition** option.
2. In the list, select the requisition that you want to copy.
3. Define new job numbers for the jobs whose items are sent to the original requisition:
 - a. Select a job in the list.
 - b. In the **New Job #** field, type a new number for the job.
 - c. Click **Set** to save the new job number.

Repeat steps a to c for all necessary jobs.

4. In the **New Requisition Number** field, type a number for the new requisition.
5. Click **Copy**.

A new requisition is created based on the selected requisition.

1.2 Define the purchase order settings

Before you start to use the **Purchasing** module, you need to separately define the default settings and options used for requisitions and purchase orders.

For more information, see the following links:

[Import, view, or delete advance shipment notices \(page 0 \)](#)

[Define company standard settings for purchase orders \(page 14\)](#)

[View, print, or export global receiving reports \(page 17\)](#)

[Add, modify, or delete purchase order types \(page 19\)](#)

[Add, modify, and delete shipping methods for purchase orders \(page 20\)](#)

[Add, modify, or delete payment terms for purchase orders \(page 22\)](#)

[Add, modify, or delete purchase order remarks \(page 0 \)](#)

[Add, modify, or delete top text items \(page 24\)](#)

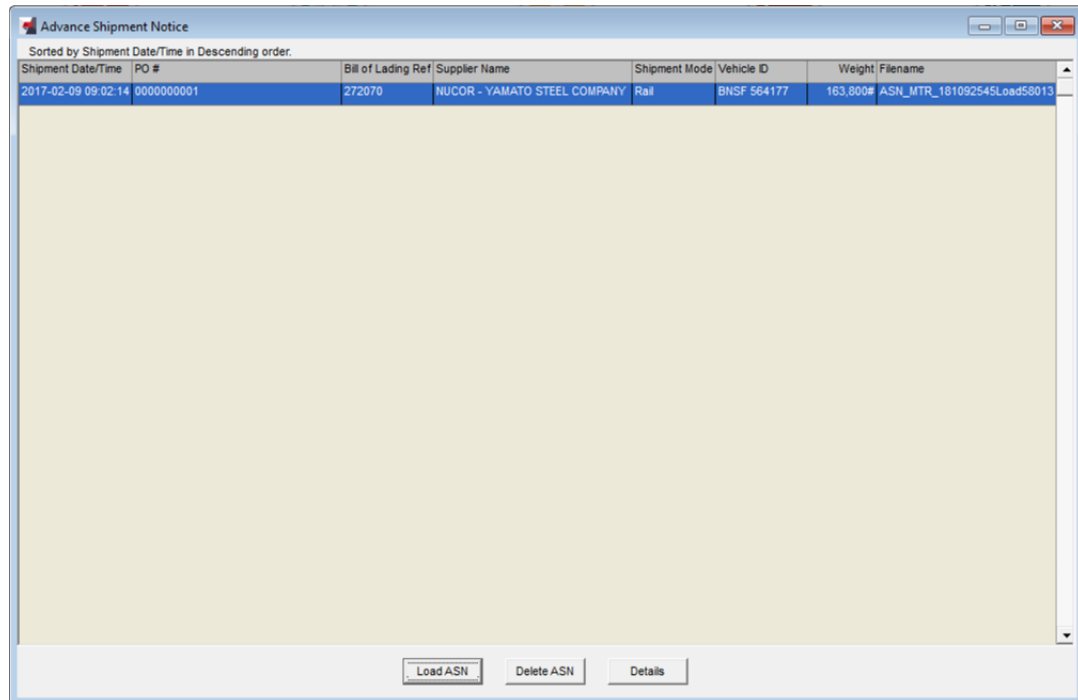
Import, view, or delete advance shipment notices

In the **Advance Shipment Notice** dialog box, you can import advance shipment notices from XML files to Tekla EPM. You can also view the shipment

details of an advance shipment notice, or delete any unnecessary advance shipment notices.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> Advance Shipment Notices**.

The **Advance Shipment Notice** dialog box opens.



Import an advance shipment notice

1. At the bottom of the **Advance Shipment Notice** dialog box, click **Load ASN**.
2. In the **Open** dialog box, browse to find the XML file that you want to import.
3. Select the file and click **Open**.
If the order number in the XML file does not match any existing purchase orders, the **Enter Value** dialog box opens.
4. Click the arrow on the right side of the list, and select the purchase order to which you want to import the XML file.
5. Click **OK**.
6. In the **Load Advance Shipment Notice** dialog box, view the progress of the import process.

7. When the import is completed, click **Close** at the bottom of the dialog box.

The advance shipment notice has now been imported for the selected purchase order. If necessary, you can view the details of the advance shipment notice.

View the details of an advance shipment notice

1. In the **Advance Shipment Notice** dialog box, select the advance shipment notice whose details you want to view.
2. Click **Details**.
3. View the advance shipment notice.
Click the various tabs and buttons to show different details about the advance shipment notice.
4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

Delete an advance shipment notice

Note that deleting an advance shipment notice is permanent and cannot be undone. This means that you need to re-import the XML file to view the advance shipment notice again.

1. In the **Advance Shipment Notice** dialog box, select the advance shipment notice that you want to delete.
2. Click **Delete ASN**.
3. To permanently delete the advance shipment notice, click **Yes** in the confirmation dialog box.

Define company standard settings for purchase orders

In the **Purchase Order Company Standards** dialog box, you can create the default settings that become the company standard settings, and the units used in all new purchase orders. If necessary, you can change the settings for each individual purchase order.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> Company Standards**.
3. On the **General** tab of the **Purchase Order Company Standards** dialog box, adjust the settings according to your needs:

Option	Description
P.O. # Increment	Allows you to select the default option for automatic numbering of purchase orders. The options are:

Option	Description
	<ul style="list-style-type: none"> • Increment from Last P.O. #: When you create a new purchase order, Tekla EPM uses the next available number after the latest purchase order number created. • Increment from Largest P.O. #: Tekla EPM uses the next available number after the largest purchase order number created. • Don't Increment: Automatic numbering is not used.
'Purchase Order' Text	<p>Allows you to replace the word 'Purchase order' in Tekla EPM with an alternative text. The alternative text will be used wherever 'Purchase order' is currently used in Tekla EPM.</p> <p>Note that you need to close and re-open Tekla EPM to update the purchase order text.</p> <p>Type the desired text in the 'Purchase Order' Text field.</p>
'P.O.' Text	<p>Allows you to replace the abbreviation 'P.O.' in Tekla EPM with an alternative text. The alternative text will be used wherever 'P.O.' is currently used in Tekla EPM.</p> <p>Note that you need to close and re-open Tekla EPM to update the P.O. text.</p> <p>Type the desired text in the 'P.O.' Text field.</p>
Item Increment	<p>Sets the auto-increment for item numbers.</p> <p>The auto-increment allows the items to be added in the list according to your needs, without having to renumber the other items in the requisition.</p> <p>For example, if items should be numbered as 10, 20, 30, ..., the input increment should be set to 10. If auto-increment of item numbers is not necessary, type 1 in the Item Increment field.</p>
Keep Purchasing Selection Screen Open	<p>When selected, the Select Requisition/Purchase Order dialog box stays open after a purchase order has been opened. Otherwise, the Select Requisition/Purchase Order dialog box will close when you open a purchase order.</p>
Generate Barcode Images	<p>When selected, Tekla EPM generates the necessary barcode images for the Barcode Checklist report.</p> <p>Note that you only need to select the Generate Barcode Images check box if you are using a</p>

Option	Description
	<p>customized version of the Barcode Checklist report designed with Crystal Reports.</p> <p>If you are using another version of the Barcode Checklist report, the barcodes are automatically generated as a part of the report, whether or not the Generate Barcode Images check box is selected.</p>
QuickBooks - Export PO Summary Only	When selected, purchase order items are exported as a whole without any line item details.
P.O. # Regular Expression	<p>Allows the use of regular expressions to create the purchase order number.</p> <p>For more detailed instructions on job number regular expressions, click Regular Expression Help.</p>

4. On the **Receiving** tab, select the check boxes next to the properties that you want to define when receiving material items.
5. On the **Default Remarks** tab, do any of the following to define the remarks added for all new purchase orders by default.
 - Type the necessary remarks in the available fields.
 - Click the arrow buttons on the right side of the available fields and select previously set remarks.

For more information about managing remarks, see [Add, modify, or delete purchase order remarks \(page 23\)](#).

6. On the **Default Top Text** tab, do any of the following to define the top text added for all new purchase orders by default:
 - Type a name for the top text item in the **Description** field, and type any necessary information in the **Top Text** field.
 - Click the arrow button on the right side of the **Description** list, and select a previously set top text item.

For more information about managing top text items, [Add, modify, or delete top text items \(page 24\)](#).

7. To adjust the input and display units used for purchase orders, click the **Input/Display Units** button.
8. In the **Input/Display Units** dialog box, click the arrows on the right side of the fields to select the units and the length input type.

Note that there are multiple options depending on the required precision and the desired input method.

9. Click **OK**.

10. In the **Purchase Order Company Standards** dialog box, click **Save** to update the settings.
11. To close the dialog box, click the **Close** button (X) in the upper-right corner.

View, print, or export global receiving reports

Use the **Receiving Reports** command to create receiving reports that contain information from all or various purchase orders. You can then view or print the reports, or export the reports and save them in another file format. For example, you can create a purchase order summary, or a receiving list.

To create receiving reports, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> Receiving Reports**.
3. To only include particular purchase orders in the reports, in the **Purchase Order Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the purchase order properties that you want to include in the report to the **Included** list.
 - Type the maximum and minimum values for the purchase orders that you want to include in the report.
5. Click **OK**.

To further limit the properties of purchase orders that are included in reports, repeat steps 3 to 5 for all necessary filter types.

6. To save commonly used filters, do the following:
 - a. Click **Filter Types** in the lower-left corner.
 - b. Click **New**.
 - c. Type a description for the filter type.
 - d. Create the filter settings.
For more information, see steps 3 to 5.
 - e. Click **Add**.
 - f. To close the dialog box, click the **Close** button (X) in the upper-right corner.

The newly created filter type is selected in the **Filter Types** list.

g. To apply the filter type, click **Set**.

Note that if you save a filter type in the **Purchase Order Report Filters** dialog box, the saved filter type will also be available as a filter in the **PO #** dialog box for all purchase orders.

7. Click **Make Report**.

8. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

Note that all available receiving reports are not displayed by default. You can customize the reports that are displayed in the **Report Selection** dialog box by clicking **Edit Report Types**.

9. If you want to include the company logo and vendor code in the report, select the **Show Company Logo** and **Show Vendor Code** check boxes.

When the check boxes are cleared, the information is not included in the report.

According to your needs, see any of the following instructions:

View the report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the selected report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the report

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Modify the file name according to your needs.

5. Browse to the location where you want to save the exported file, and click **Save**.
6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

Add, modify, or delete purchase order types

In the **PO Type Maintenance** dialog box, you can create new purchase order types that meet the needs of your company. For example, recurring purchase orders can have their own purchase order type. You can also select the default purchase order type, modify existing purchase order types, and delete unnecessary purchase order types.

To access the **PO Type Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> PO Type Maintenance**.

The **PO Type Maintenance** dialog box opens.

According to your needs, see any of the following instructions:

Create a purchase order type

1. At the bottom of the **PO Type Maintenance** dialog box, click **New**.
2. Type a description for the purchase order type.
3. Click **Add**.

Set a purchase order type as default

1. In the **PO Type Maintenance** dialog box, select the desired purchase order type.
2. Click **Set as Default**.
3. To confirm setting the selected purchase order type as the default option, click **Yes** in the confirmation dialog box.

Modify a purchase order type

1. In the **PO Type Maintenance** dialog box, select the purchase order type that you want to modify.
2. Modify the description according to your needs.

3. Click **Edit** to save the changes.

Delete a purchase order type

Note that deleting a purchase order type is permanent and cannot be undone.

1. In the **PO Type Maintenance** dialog box, select the purchase order type that you want to delete.
2. Click **Delete**.
3. To permanently delete the purchase order type, click **Yes** in the confirmation dialog box.

Add, modify, and delete shipping methods for purchase orders

In the **Shipping Method Maintenance** dialog box, you can add, modify, and delete shipping method options that are available for the purchase orders created in **Purchasing**. You can also select which shipping method you want to use as the default option.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> Shipping Method Maintenance**.
3. In the **Purchase Order Payment Term Maintenance** dialog box, do any of the following according to your needs:

To	Do this
Add a new shipping method	<ol style="list-style-type: none">a. Click New.b. In the Description field, describe the new shipping method.c. Click Add to save the new shipping method and add it to the list.
Set a default shipping method	<ol style="list-style-type: none">a. Select the desired shipping method.b. Click Set as Default.c. To confirm using the selected shipping method as the default option, click Yes in the confirmation dialog box. The default shipping method is marked with an asterisk (*). The same shipping method will be used by default in the Purchasing module.
Modify a shipping method	<ol style="list-style-type: none">a. Select the shipping method that you want to modify.b. Modify the description.

To	Do this
	c. Click Edit to save the changes.
Delete a shipping method	a. Select a shipping method in the list. b. Click Delete . c. To permanently delete the shipping method, click Yes in the confirmation dialog box.

4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

Add, modify, or delete FOB shipping destinations

In the **Purchase Order FOB Maintenance** dialog box, you can create, modify, and delete FOB (Free on Board) shipping destinations. You can also set a default FOB shipping destination. The destinations set in the **Purchase Order FOB Maintenance** dialog box are available for all purchase orders.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> FOB Maintenance**.

The **Purchase Order FOB Maintenance** dialog box opens.

According to your needs, see any of the following instructions:

Create a FOB shipping destination

1. At the bottom of the **Purchase Order FOB Maintenance** dialog box, click **New**.
2. Type a description for the shipping destination.
3. Click **Add**.

Set the default FOB shipping destination

The current FOB shipping method is marked with an asterisk (*). To change the default option, do the following:

1. In the **Purchase Order FOB Maintenance** dialog box, select the desired shipping destination.
2. Click **Set as Default**.
3. To confirm setting the selected shipping destination as the default option, click **Yes** in the confirmation dialog box.

The new FOB shipping method is marked with an asterisk (*).

Modify a FOB shipping destination

1. In the **Purchase Order FOB Maintenance** dialog box, select the shipping destination that you want to modify.
2. Modify the description according to your needs.
3. Click **Edit** to save the changes.

Delete a FOB shipping destination

Note that deleting a FOB shipping destination is permanent and cannot be undone.

1. In the **Purchase Order FOB Maintenance** dialog box, select the shipping destination that you want to delete.
2. Click **Delete**.
3. To permanently delete the shipping destination, click **Yes** in the confirmation dialog box.

Add, modify, or delete payment terms for purchase orders

You can add, modify, or delete the payment term options that are available for all purchase orders created in **Purchasing**. In addition, you can set the default payment term that will be used for all future purchase orders by default.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchasing --> Payment Term Maintenance**.
3. In the **Purchase Order Payment Term Maintenance** dialog box, do any of the following according to your needs:

To	Do this
Add a new payment term	<ol style="list-style-type: none">a. Click New.b. In the Description field, type a description for the payment term.c. If necessary, in the Discount field, type a discount percentage for the payment term.d. Click Add to save the new payment term and add it to the list.
Set a default payment term	<ol style="list-style-type: none">a. Select a payment term in the list.b. Click Set as Default.

To	Do this
	<p>c. To confirm using the selected payment term as the default option, click Yes in the confirmation dialog box.</p> <p>The default payment term is marked with an asterisk (*). The same payment term will be used by default for all future purchase orders.</p>
Modify a payment term	<p>a. Select a payment term in the list.</p> <p>b. Modify the description and the discount percentage according to your needs.</p> <p>c. Click Edit to save the changes.</p>
Delete a payment term	<p>a. Select a payment term in the list.</p> <p>b. Click Delete.</p> <p>c. To permanently delete the payment term, click Yes in the confirmation dialog box.</p>

4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

Add, modify, or delete purchase order remarks

In the **Purchase Order Remark Maintenance** dialog box, you can create remarks for purchase orders. You can also modify existing remarks or delete any unnecessary remarks. The remarks set in the **Purchase Order Remark Maintenance** dialog box are available for all purchase orders that you create or modify.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> Remark Maintenance**.

The **Purchase Order Remark Maintenance** dialog box opens.

According to your needs, see any of the following instructions:

Create a remark

1. At the bottom of the **Purchase Order Remark Maintenance** dialog box, click **New**.
2. In the **Description** field, type the remark.
For example, MTRs required.
3. Click **Add**.

Modify a remark

1. In the **Purchase Order Remark Maintenance** dialog box, select the remark that you want to modify.
2. In the **Description** field, modify the text according to your needs.
3. Click **Edit** to save the changes.

Delete a remark

1. In the **Purchase Order Remark Maintenance** dialog box, select the remark that you want to delete.
2. Click **Delete**.
3. To permanently delete the remark, click **Yes** in the confirmation dialog box.

Add, modify, or delete top text items

Top text items are pieces of text that can be added at the top of purchase orders. In the **Purchase Order Top Text Maintenance** dialog box, you can add new top text items, or modify and delete existing top text items.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Purchase Orders --> Top Text Maintenance**.

The **Purchase Order Top Text Maintenance** dialog box opens.

The top text items created in the **Purchase Order Top Text Maintenance** can be set as default options that are added for all nex purchase orders. For more information, see [Define company standard settings for purchase orders \(page 14\)](#).

Create a top text item

1. At the bottom of the **Purchase Order Top Text Maintenance** dialog box, click **New**.
2. In the **Description** field, type a name for the top text item.
3. In the **Top Text** field, type the information to be added at the top of the purchase orders.
4. Click **Add**.

Modify a top text item

1. In the **Purchase Order Top Text Maintenance** dialog box, select the top text item that you want to modify.

2. In the **Description** field, modify the item name according to your needs.
3. In the **Top Text** field, modify the top text according to your needs.
4. Click **Edit** to save the changes.

Delete a top text item

1. In the **Purchase Order Top Text Maintenance** dialog box, select the top text item that you want to delete.
2. Click **Delete**.
3. To permanently delete the top text item, click **Yes** in the confirmation dialog box.

1.3 Create, modify, or delete cost codes

You can use cost codes to keep track of specific costs and set them to match your accounting system. In the **Cost Code Maintenance** dialog box, you can create cost codes that are available for items in all requisitions and purchase orders. You can also modify the existing cost codes, and delete unnecessary ones.

To access the **Cost Code Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select either **Requisitions --> Cost Codes** or **Purchase Orders --> Cost Codes**.

The **Cost Code Maintenance** dialog box opens.

According to your needs, see any of the following instructions:

Create a cost code

1. At the bottom of the **Cost Code Maintenance** dialog box, click **New**.
2. Type an abbreviation for the cost code.
3. Type a description for the cost code.
For example, `Structural fabrication`.
4. Click **Add**.

Modify a cost code

1. In the **Cost Code Maintenance** dialog box, select the cost code that you want to modify.

2. Modify the abbreviation and description according to your needs.
3. Click **Edit** to save the changes.

Delete a cost code

Note that deleting a cost code is permanent and cannot be undone. After deleting the cost code, you cannot use the cost code for requisition items.

1. In the **Cost Code Maintenance** dialog box, select the cost code that you want to delete.
2. Click **Delete**.
3. To permanently delete the cost code, click **Yes** in the confirmation dialog box.

2

Create and manage requisitions

On the **Requisitions** part of the **Purchasing** module, you can create and modify requisitions and material items within them. The purpose of creating requisitions is having a list of the required materials for multiple jobs, so that you can optimize the use of similar materials. By creating requisitions, you can quote the required materials from vendors and attach the material items to purchase orders or existing inventory.

Requisitions also hold a copy of the production control record that is attached to the stock materials. You can manually move the records to and from stock items.

You can use and organize requisitions in different ways according to your needs. To illustrate, you can either use a single requisition for all required materials, or create separate requisitions for each phase and material type in each job.

We recommend that you plan the numbering of requisitions carefully to help you organize the requisitions in the future.

In requisitions, you can:

- Combine all or selected material items.
- Load material items into a purchase order.
- View the purchase history or change history of the requisition.
- Update the pricing information.
- Create an export requests for pricing.
- Import pricing information for requisitions.
- Create requisition reports.

For more information, see the following links:

[Create a requisition \(page 28\)](#)

[Open a requisition \(page 31\)](#)

[Modify a requisition \(page 32\)](#)
[Store document references for a requisition \(page 34\)](#)
[Add a requisition item \(page 42\)](#)
[Copy a requisition item \(page 46\)](#)
[Modify requisition items \(page 46\)](#)
[Delete requisition items \(page 51\)](#)
[View the pricing history of a requisition item \(page 51\)](#)
[View all changes in a requisition \(page 53\)](#)
[Load requisition items into a purchase order \(page 54\)](#)
[Export a request for pricing \(page 55\)](#)
[Import pricing information to a requisition \(page 57\)](#)
[Update pricing information \(page 60\)](#)
[Combine items in the Requisition # dialog box \(page 62\)](#)
[View, print, or export requisition-specific reports \(page 64\)](#)
[Delete requisitions \(page 66\)](#)

2.1 Create a requisition

To create a new requisition where you can load and store material items, do the following:

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Requisitions** tab.
3. Click **Add**.

The screenshot shows a 'Requisition Edit: [New]' window with a 'General' tab. The fields are as follows:

- Requisition Date: 2/27/2019
- Requisition #: EPM00003
- Description: Sample requisition 3
- Requisition Group: Two empty dropdown menus.
- Item Increment: 10

At the bottom, there are four buttons: 'Combining Optimizations', 'Suppliers', 'Input/Display Units', and 'Save (F4)'.

4. On the **General** tab of the **Requisition Edit** dialog box, do either of the following to define the requisition number.

- Type the desired requisition number in the **Requisition #** field.
- To use the next available number from a prefix as the requisition number, type the desired prefix, double-click the **Requisition #** field, and click **Yes** to confirm using the prefix.

For example, you can use a related job number as the prefix.

We recommend that you plan the numbering of requisitions carefully to help you organize the requisitions in the future. The requisition number cannot be changed later. All other requisition information can be modified later, if necessary.

5. Define the remaining requisition properties.

The properties marked with an asterisk (*) are mandatory information.

Option	Description
Requisition Date *	<p>The date of the requisition.</p> <p>Tekla EPM automatically uses the current date. To change the date, do one of the following:</p> <ul style="list-style-type: none"> Type the date in the Requisition Date field. <p>The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.</p>

Option	Description
	<ul style="list-style-type: none"> Click the arrow on the right side of the Requisition Date field and select a date in the calendar.
Description	<p>Any description of the requisition.</p> <p>Type a description in the Description field.</p>
Requisition Group	<p>The groups where the requisition belongs to.</p> <p>Setting requisition groups for the requisition helps you to sort requisitions in the Select Requisition/Purchase Order dialog box.</p> <p>To set requisition groups, do one of the following:</p> <ul style="list-style-type: none"> Type new requisition group names in the Requisition Group fields. Click the arrows on the right side of the Requisition Group fields, and select existing requisition groups in the lists.
Item Increment	<p>Sets the auto-increment for item numbers in the requisition.</p> <p>The auto-increment allows the items to be added in the list according to your needs, without having to renumber the other items in the requisition.</p> <p>For example, if items should be numbered as 10, 20, 30, ..., the input increment should be set to 10. If the auto-increment of item numbers is not necessary, type 1 in the Item Increment field.</p>

- On the **Notes** tab, type any notes about the requisition.
- Click the buttons at the bottom of the **Requisition Edit** dialog box to adjust the combining optimizations, suppliers, and input and display units.

For more information, see:

- [Define combining optimizations for requisitions \(page 7\)](#)
- [Define suppliers for requisitions \(page 9\)](#)
- [Define default input and display units for requisitions \(page 7\)](#)

- Click **Save** to create the requisition.

The **Requisition Edit** dialog box closes. The new requisition is added to the **Select Requisition/Purchase Order** dialog box.

See also

[Open a requisition \(page 31\)](#)

[Modify a requisition \(page 32\)](#)

[Store document references for a requisition \(page 34\)](#)

[Delete requisitions \(page 66\)](#)

2.2 Open a requisition

To view and modify the material items in a requisition, you need to open the requisition:

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Requisitions** tab.
3. Select the requisition that you want to open.
4. Do one of the following:
 - At the bottom of the dialog box, click **Open**.
 - Double-click the selected requisition.

The **Requisition #** dialog box opens. View the components of the dialog box in the following image:

The screenshot shows the 'Requisition # Sample1' dialog box. It features a summary grid at the top right (1) with columns for Item (Each), Quantity, Length, Square Feet, Weight, Surface Area, and Cost. Below this is a list of requisitions on the left (5) with columns for Job #, Qty, Shape, Dimension, Length, Grade, and Lot #. The center of the dialog box contains a detailed item list (3) with columns for Item #, Job #, Quantity, Shape, Dimensions, Length, Grade, and Lot #. The right side of the dialog box contains a detailed item form (4) with fields for Item #, Job #, Quantity, Shape, Dimensions, Length, Grade, Base Price, Reference Number, Date Required, Date Promised, Mill Mark, Cost Code, Comment, PRC Date, PRC Cost, PRC Unit Cost, PRC Supplier, Warehouse, Lot #, Sequence, Sub-Category, Category, Drop, Drop Cost, and Kerf. The bottom of the dialog box has buttons for 'New (F1)', 'Save (F4)', 'Copy (F3)', 'Uncombine (F2)', and 'Set Kerf'. A 'Linked to PDC: 5/5' status is shown at the bottom right. A '6' is placed near the bottom right corner of the dialog box.

(1) The summary grid: shows the number of requisition items, their length, square feet, weight, surface area, and cost for items for a single item, the selected items, the displayed items, and the entire requisition.


(2) The mode switch button: the **Requisition #** dialog box has two modes: the input mode and the manual combine mode. In the input mode, you can add

material items and modify them. In the manual combine mode, you can add stock material items, and combine specific material items manually.

To change the mode, click the button in the upper-left corner.

(3) The display area: shows all material items in the requisition.

The visible columns and details can be modified in the **Edit Display Fields** dialog box.

Note that a  in the leftmost column indicates that the material items have been combined.

(4) The input area: allows you to add properties for new material items and modify properties of the existing material items.

When you select an item in the display area, its properties automatically populate the input fields.

The visible columns and details can be modified in the **Edit Input Fields** dialog box.

(5) The navigation tree: allows you to only view specific items in the requisition.

Click **+** to expand and select options in the navigation tree. When you select an option, only material items that match the selected properties are displayed in the display area.

For example, you can expand **Shape** and select **HSS** to only display hollow structural sections.

(6) Combining information grid: shows the pieces combined to the item that is selected in the display area.

Note that you can see the number of pieces linked to **Production Control** in the lower-right corner of the dialog box.

2.3 Modify a requisition

You can modify all properties of a requisition at any time, except for the requisition number.

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Requisitions** tab.
3. Select the requisition that you want to modify.
4. Click **Edit**.
5. On the **General** tab of the **Requisition Edit** dialog box, modify the requisition properties according to your needs.

The properties marked with an asterisk (*) are mandatory information.

Option	Description
Requisition Date *	<p>The date of the requisition.</p> <p>Tekla EPM automatically uses the current date. To change the date, do one of the following:</p> <ul style="list-style-type: none"> Type the date in the Requisition Date field. <p>The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.</p> <ul style="list-style-type: none"> Click the arrow on the right side of the Requisition Date field and select a date in the calendar.
Description	<p>Any description of the requisition.</p> <p>Type a description in the Description field.</p>
Requisition Group	<p>The groups where the requisition belongs to.</p> <p>Setting requisition groups for the requisition helps you to sort requisitions in the Select Requisition/ Purchase Order dialog box.</p> <p>To set requisition groups, do one of the following:</p> <ul style="list-style-type: none"> Type new requisition group names in the Requisition Group fields. Click the arrows on the right side of the Requisition Group fields, and select existing requisition groups in the lists.
Item Increment	<p>Sets the auto-increment for item numbers in the requisition.</p> <p>The auto-increment allows the items to be added in the list according to your needs, without having to renumber the other items in the requisition.</p> <p>For example, if items should be numbered as 10, 20, 30, ..., the input increment should be set to 10. If the auto-increment of item numbers is not necessary, type 1 in the Item Increment field.</p>

- On the **Notes** tab, modify the notes about the requisition.
- Click the buttons at the bottom of the **Requisition Edit** dialog box to adjust the combining optimizations, suppliers, and input and display units.

For more information, see:

- [Define combining optimizations for requisitions \(page 7\)](#)
- [Define suppliers for requisitions \(page 9\)](#)

- [Define default input and display units for requisitions \(page 7\)](#)
8. Click **Save** to update the requisition.
- The **Requisition Edit** dialog box closes.

See also

[Open a requisition \(page 31\)](#)

[Store document references for a requisition \(page 34\)](#)

[Delete requisitions \(page 66\)](#)

2.4 Store document references for a requisition

Document Index is where you can store documents for reference. When you store documents in **Document Index**, each user that has access to the requisition can view them, so it is easy to keep up to date on the requisition status. You can save any documents, such as pricing quotes from vendors, and Microsoft Outlook emails in **Document Index**.

To access **Document Index**, do the following:

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Requisitions** tab.
3. Select the requisition for which you want to add document references.
4. Click **Doc Ind**.

The **Document Index** dialog box opens. Next, you can either modify the available folders for document references, or add, modify, delete, open, and email document reference files.

See also

[Manage document reference categories \(page 34\)](#)

[Open a document reference \(page 36\)](#)

[Add document references for estimating jobs \(page 36\)](#)

[Modify a document reference \(page 40\)](#)

[Attach a document reference to an email \(page 41\)](#)

[Delete a document reference \(page 42\)](#)

Manage document reference categories

Use the **Edit Categories** command in **Document Index** to manage the categories that you can use to organize document references. You can add

new categories, rename categories, and delete unnecessary categories. You can also change the default folder where document references are saved.

1. At the bottom of the **Document Index - By Category** dialog box, click **Edit Categories**.
2. In the **Document Index - Edit Categories** dialog box, do any of the following:

To	Do this
Add a new category	<ol style="list-style-type: none"> In the navigation tree at the top of the dialog box, select the parent category for the new category. Click Add. Type a name for the new category. For example, <i>Miscellaneous documents</i>. Click OK. <p>The new category is added to the list.</p>
Rename a category	<ol style="list-style-type: none"> In the navigation tree at the top of the dialog box, select the category that you want to rename. Type a new name for the category. Click OK. <p>The category name is updated.</p>
Delete a category	<ol style="list-style-type: none"> In the navigation tree at the top of the dialog box, select the category that you want to delete. Click Delete. Note that you cannot delete a category that has sub-categories. To permanently delete the category, click Yes in the confirmation dialog box.
Change the default folder where documents are saved	<p>When documents are added in Document Index, the selected document can be either moved or copied to the selected folder. This way, Tekla EPM retains all documents that have been saved to Document Index, even if the original documents are moved or deleted.</p> <p>The default folder for saving documents needs to be in the Tekla EPM default folders, so that all users can view the attached documents. Files</p>

To	Do this
	<p>saved elsewhere than the default location cannot be viewed by other Tekla EPM users.</p> <ol style="list-style-type: none"> Click Default Dir. Do one of the following: <ul style="list-style-type: none"> Select the folder that you want to use as the default folder. Click Make New Folder to add a new folder under the currently selected one, and click it to use it as the default folder. Click OK.

- To close the dialog box, click the **Close** button (X) in the upper-right corner.

Open a document reference

Use the **Open File** command to open and view a document reference.

- In the **Document Index - By Category**, select the document that you want to open.
- Click **Open File**.

The selected document opens.

See also

[Add document references for estimating jobs \(page 36\)](#)

[Modify a document reference \(page 40\)](#)

[Attach a document reference to an email \(page 41\)](#)

[Delete a document reference \(page 42\)](#)

Add document references for estimating jobs

You can either upload completely new document references, such as documents, Microsoft Outlook emails, and Microsoft Outlook email attachments to **Document Index**, or add documents already loaded to **Document Index** for the current job.

Add new documents

- In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.

2. Click **Add Document Reference**.

If you are viewing the document references of multiple modules and have not selected a module-specific category in the navigation tree, Tekla EPM asks you for which module you want to save the file.

3. Select the desired module.

4. In the **Document Index - Add Document Reference** dialog box, click **Add File**.

You can also drag and drop files to the **Document Index - Add Document Reference** dialog box. If you do so, skip steps 5 and 6.

5. In the **Open** dialog box, browse to find the document that you want to add, and select the document.

6. Click **Open**.

If you want to add more documents with the same settings, click **Add Additional File** and repeat steps 4 to 6 for each document.

7. In the **Add File** dialog box, select the company and contact that provided you with the document in the **File Source** lists.

You can also drag and drop files to the **Add File** dialog box.

8. According to your needs, do one of the following:

- To compress multiple documents into one archive, select the **Compress Files into a Single Archive** option.
- To leave the documents that you added uncompressed, select the **Leave Files Uncompressed** option.

9. If you want to change the folder where the document is saved, click **Browse** and select a new folder.

10. According to your needs, do one of the following:

- To move the original document to the selected folder, select the **Move File** option.
- To copy the document to the selected folder but leave the original untouched, select the **Copy File (Leave Original)** option.

11. Type a description for the attached document.

12. Click **Add File**.

13. Type a description for the entire document reference.

This description applies to all documents, emails, and email attachments that you add.

14. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the documents are added to **Document Index**. You can see all added documents in the list in the **Document Index - By Category** dialog box.

Add a Microsoft Outlook email

1. In Microsoft Outlook, select the email that you want to add.
2. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the email.
3. Click **Add Document Reference**.
4. In the **Document Index - Add Document Reference** dialog box, click **Add Outlook Email**.

A copy of the email is added to **Document Index**.

The text of the email is added to the **Description** field.

5. Click **Add File**.
6. Type a description for the entire document reference.
This description applies to all documents, emails, and email attachments that you add.
7. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the emails are added to **Document Index**.

Add an attachment from a Microsoft Outlook email

1. In Microsoft Outlook, select the email with the attachment that you want to add.
2. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the attachment.
3. Click **Add Document Reference**.
4. In the **Document Index - Add Document Reference** dialog box, click **Add Outlook Attachments**.
5. Browse to the folder where you want to save the email attachment, and click the folder to select it.
6. Click **Open**.
7. In the **Add File** dialog box, select the company and contact that provided you with the email attachment in the **File Source** lists.
8. According to your needs, do one of the following:

- To compress multiple email attachments into one archive, select the **Compress Files into a Single Archive** option.
 - To leave the email attachments you added uncompressed, select the **Leave Files Uncompressed** option.
9. Type a description for the email attachment.
 10. Click **Add File**.
 11. Type a description for the entire document reference.
This description applies to all documents, emails, and email attachments that you add.
 12. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the email attachments are added to **Document Index**.

Search for and add a document already in Document Index

To find and add documents for the current job that are already saved in **Document Index**, use the **Search** command.

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Search**.
4. In the **Search** dialog box, click **Browse** and select the folder where you want to look for documents.

TIP To also search from the sub-folders of the selected folder, select the **Sub-Directories** check box.

5. To narrow the search, do one or more of the following:
 - Type the document name, document size, and file name extension.
 - In **File Date**, select the dates between which the document has been created or downloaded onto your computer.
 - In **Date Loaded**, select the dates between which the document has been added to **Document Index**.
 - In the **Source** lists, select the contact and company that have provided the document.
6. To include archived documents in the search, select the **Include All Archive Files** check box.

7. Click **Search**.

The search results appear at the top of the **Search** dialog box.

8. In the search results, double-click the document that you want to add.

The document is added to **Document Index** for the current job.

Browse for and add a document already in Document Index

To browse to and add documents to the current job that are already saved in **Document Index**, use the **Find By Directory** command. You can also add new documents, delete existing documents, rename documents and categories, move documents to other folders, and open documents.

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Find By Directory**.
4. In the navigation tree on the left of the **Document Index - By Directory** dialog box, select a category.

If you want to rename the selected category, you can click **Rename Directory**, type a new name, and click **OK**.

The documents within the category are listed in the display area of the dialog box.

5. Select a document.
6. In the lower-right corner, click **Select**.

Note that besides adding an existing document to the current job, you can also use the buttons at the bottom of the dialog box to:

- Add new documents (**Add File**).
- Delete a document (**Delete File**).
- Move a document to another folder within the document index folder (**Move File**).
- Rename a document (**Rename File**).
- Open a document (**Open File**).

The document is added to **Document Index** for the current job.

Modify a document reference

Use the **Edit Document Reference** command to modify the source and description of a document in **Document Index**.

1. In the **Document Index - By Category** dialog box, select the document that you want to modify.
2. Click **Edit Document Reference**.
3. In the **Document Reference Details** dialog box, click **Filename**.
4. In the **File Details** dialog box, modify the file source and description according to your needs.
5. Click **Save**.
6. To close the **File Details** dialog box, click the **Close** button (X) in the upper-right corner.
7. Modify the description according to your needs.

Entering a description in the **Document Reference Details** dialog box will override the description that you entered in the **File Details** dialog box. This description will then appear in the **Description** column in the **Document Index - By Category** dialog box.
8. Click **Save**.
9. To close the **Document Reference Details** dialog box, click the **Close** button (X) in the upper-right corner.

See also

[Add document references for estimating jobs \(page 36\)](#)

[Open a document reference \(page 36\)](#)

[Delete a document reference \(page 42\)](#)

Attach a document reference to an email

Use the **Email File** command to create a new Microsoft Outlook email and send a document to the desired recipients via email.

1. In the **Document Index - By Category** dialog box, select the document that you want to send via email.
2. Click **Email File**.

Microsoft Outlook opens. A new email with the selected document is created, with the selected document attached to it.
3. Add recipients and modify the text of the email.
4. Send the email.

See also

[Add document references for estimating jobs \(page 36\)](#)

[Open a document reference \(page 36\)](#)

Delete a document reference

Deleting a document reference from **Document Index** is permanent and cannot be undone. If you delete a document reference, you or any other Tekla EPM users will not be able to access the document reference or any documents, emails, or attachments that it contains, from **Document Index**.

1. In the **Document Index - By Category** dialog box, select the document reference that you want to delete.
2. Click **Delete Document Reference**.
3. To permanently delete the document reference, click **Yes** in the confirmation dialog box.

See also

[Add document references for estimating jobs \(page 36\)](#)

[Modify a document reference \(page 40\)](#)

[Open a document reference \(page 36\)](#)

2.5 Add a requisition item

Most items are added to requisitions by loading the material items from combining, estimating, or production control jobs to requisitions. You can also add new items to an open requisition manually.

1. In the **Requisition #** dialog box, click **New**.
2. Define the item properties.

NOTE The visible input fields and their order can be modified in the **Input Fields** dialog box that you can access via **Maintenance --> Requisitions --> Edit Input Fields**.

The properties marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Item # *	<p>The number of the requisition item.</p> <p>The Item # is automatically populated with the next available item number, but you can modify the item number according to your needs.</p> <p>If necessary, type a new item number in the Item # field.</p>

Option	Description
Job #	The number of the production control job to which the material item is reserved. Type the job number in the Job # field.
Quantity *	The number of pieces to be added. Use the numeric keypad in the quantity field to add, multiply, divide, or subtract numbers to adjust the quantity.
Shape *	The material shape of each piece. Either click the arrow on the right side of the Shape field to select the shape, or type the shape indicator in the field (for example, HSS).
Grade *	The material grade of each piece. Either click the arrow on the right side of the Grade list to select the grade, or type the grade indicator in the field.
Dimensions *	<p>The material dimension, or material size, of each piece.</p> <p>Click the Dimensions field to select an available material dimension, and double-click the desired dimension in the list.</p> <hr/> <p>TIP You can also use a custom material dimension. Note that the dimension is not automatically added to the material database.</p> <p>To use a custom dimension, do the following:</p> <ol style="list-style-type: none"> Click in the Dimensions field. Click Add Size. Define the dimension properties. Click Save. <p>You can now select the dimension and use it.</p> <hr/>
Length	The length of each piece. Default length input settings are set in Company Standards , but you can modify them for each job.

Option	Description
Base Price	<p>The base price of the material item. We recommend that you use base prices to create more detailed reports.</p> <p>Type the base price in the Base Price field.</p> <p>To change the base price units and convert the current price to the selected units, right-click the Base Price field, and select an appropriate option in the context menu.</p>
Reference Number	<p>The reference number that links the item to a production control job.</p> <p>The reference number can be different depending on the case:</p> <ul style="list-style-type: none"> • If an item is sent from Production Control to Purchasing or Inventory, Tekla EPM creates a copy of the record, and the item is linked to include the reference number. • If an item is sent to purchasing from an advance bill of materials, the reference number is either the eventual mark number of the item, or the page number along with the item number. • If the item is sent to purchasing later in the process, the reference number is the mark or piece mark number.
Date Required	<p>The date when the material item is due. Entering the required date can be useful when creating reports.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> • Type the date in the Date Required field. The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY. • Click the arrow on the right side of the Date Required field and select the date in the calendar.
Date Promised	<p>The date when the supplier has promised to deliver the material item. The Date Promised can be useful in reports.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> • Type the date in the Date Promised field. The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.

Option	Description
	<ul style="list-style-type: none"> Click the arrow on the right side of the Date Promised field and select the date in the calendar.
Mill Mark	<p>Any extra information about the item that the mill has given you.</p> <p>Type any information in the Mill Mark field.</p>
Cost Code	<p>The cost code assigned to the item.</p> <p>Click the arrow on the right side of the Cost Code list, and select a cost code in the list.</p> <p>For more information about cost codes, see Create, modify, or delete cost codes (page 25).</p>
Comment	<p>Any comments that you want to add about the material item.</p> <p>Type the comments in the Comment field.</p>
PRC Supplier	<p>The supplier whose pricing the item uses.</p> <p>To change the supplier, click the arrow on the right side of the PRC Supplier list and select the supplier in the list.</p>
Lot #	<p>The lot identification number of the material item.</p> <p>Type the lot number in the Lot # field.</p>
Sequence	<p>The sequence number assigned to the item.</p> <p>Type the sequence number in the Sequence field.</p>
Category, Sub-Category	<p>A keyword used for sorting items in the Requisition # dialog box. Categories and sub-categories can be used for filtering information in the Requisition # dialog box.</p> <p>Type the desired keywords in the Category and Sub-Category fields.</p>

3. Click **Add**.

The new requisition item is added at the bottom of the requisition.

Note that if you added the new item while in the manual combine mode, the item will belong to stock materials. The material items added in the manual combine mode are marked with a **c** in the leftmost column. For more information on the manual combine mode, see [Open a requisition \(page 31\)](#).

See also

[Copy a requisition item \(page 46\)](#)

[Modify a single requisition item \(page 46\)](#)

[Delete requisition items \(page 51\)](#)

2.6 Copy a requisition item

You can copy a requisition item and use it as the basis of a similar item. By copying items, you can save time and avoid entering the same information multiple times in a requisition.

1. In the **Requisition #** dialog box, select the item that you want to copy.
2. At the bottom of the dialog box, click **Copy**.

A copy of the item appears at the bottom of the requisition.

3. Adjust the properties of the new item according to your needs.
4. Click **Edit** to save the changes.

See also

[Modify a single requisition item \(page 46\)](#)

2.7 Modify requisition items

You can either modify items in requisitions one by one, or use the different **Global Edit** commands to modify multiple items at one go.

For more information, see the following links:

[Modify a single requisition item \(page 46\)](#)

[Modify multiple requisition items \(page 47\)](#)

[Modify the selected requisition items \(page 48\)](#)

[Modify the shape, grade, dimensions, or length of multiple requisition items \(page 49\)](#)

[Modify the shape, grade, dimensions, or length of the selected requisition items \(page 50\)](#)

Modify a single requisition item

You can modify the properties of requisition items one by one in the **Requisition #** dialog box.

1. In the **Requisition #** dialog box, select the material item that you want to modify.

2. On the right side of the dialog box, modify the properties of the item according to your needs.

For example, you can change the base price of the item or assign a cost code to the item.
3. Click **Save** to update the item properties.

See also

[Modify multiple requisition items \(page 47\)](#)

[Modify the selected requisition items \(page 48\)](#)

[Modify the shape, grade, dimensions, or length of multiple requisition items \(page 49\)](#)

[Modify the shape, grade, dimensions, or length of the selected requisition items \(page 50\)](#)

Modify multiple requisition items

Use the **Global Edit** command to modify the properties of all or multiple requisition items at one go. This way, you can save time, as you do not need to change the properties of each item individually.

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Global Edit** --> **Global Edit**.
3. To only modify specific types of items, in the **Requisition Global Edit Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the items that you want to modify to the **Included** list.
 - Type the maximum and minimum values for the items that you want to modify.
5. Click **OK**.

To further limit the item types that you want to modify, repeat steps 3 to 5 for all necessary filter types.
6. Modify any properties in the **Global Edit** dialog box according to your needs.

For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

7. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
8. Click **Update**.
9. To confirm changing the properties of multiple items, click **Yes** in the confirmation dialog box.

The changes you made to the item properties are updated to the **Requisition #** dialog box.

See also

[Modify a single requisition item \(page 46\)](#)

[Modify the selected requisition items \(page 48\)](#)

[Modify the shape, grade, dimensions, or length of multiple requisition items \(page 49\)](#)

[Modify the shape, grade, dimensions, or length of the selected requisition items \(page 50\)](#)

Modify the selected requisition items

Use the **Global Edit Selected** command to modify the properties of the selected items in the requisition. This way, you can save time, as you do not need to change the properties of each item individually.

1. In the **Requisition #** dialog box, select the items that you want to modify.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
2. Click the **Requisition** ribbon tab.
3. In the menu, select **Global Edit --> Global Edit Selected**.
4. Modify any properties in the **Global Edit** dialog box according to your needs.
For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
5. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

6. Click **Update**.

The properties of the selected items are updated to the **Requisition #** dialog box.

See also

[Modify a single requisition item \(page 46\)](#)

[Modify multiple requisition items \(page 47\)](#)

[Modify the shape, grade, dimensions, or length of multiple requisition items \(page 49\)](#)

[Modify the shape, grade, dimensions, or length of the selected requisition items \(page 50\)](#)

Modify the shape, grade, dimensions, or length of multiple requisition items

Use the **Global Edit By Shape** command to modify the shape, grade, dimensions, or length of all or multiple items in the **Requisition #** dialog box.

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Global Edit --> Global Edit By Shape**.
3. In the **Shape** list at the top of the **Requisition Global Edit Filters** dialog box, select the shape.
4. To only modify specific types of items, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the items that you want to modify to the **Included** list.
 - Type the maximum and minimum values for the items that you want to modify.
6. Click **OK**.

To further limit the items that you want to modify, repeat steps 4 to 6 for all necessary filter types.
7. Click **OK**.
8. Modify any properties in the **Global Edit** dialog box according to your needs.

For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

9. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
10. Click **Update**.
11. To confirm changing the properties of multiple items, click **Yes** in the confirmation dialog box.

The properties of the selected items are updated to the **Requisition #** dialog box.

See also

[Modify a single requisition item \(page 46\)](#)

[Modify multiple requisition items \(page 47\)](#)

[Modify the selected requisition items \(page 48\)](#)

[Modify the shape, grade, dimensions, or length of the selected requisition items \(page 50\)](#)

Modify the shape, grade, dimensions, or length of the selected requisition items

Use the **Global Edit Selected By Shape** command to modify the material shape, grade, dimensions, or length of the selected items in an requisition.

1. In the **Requisition #** dialog box, select the items that you want to modify.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
2. Click the **Requisition** ribbon tab.
3. In the menu, select **Global Edit --> Global Edit Selected By Shape**.
4. Modify any properties in the **Global Edit** dialog box according to your needs.
For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
5. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
6. Click **Update**.

The properties of the selected items are updated to the **Requisition #** dialog box.

All other reference information of the items remains unchanged.

See also

[Modify a single requisition item \(page 46\)](#)

[Modify multiple requisition items \(page 47\)](#)

[Modify the selected requisition items \(page 48\)](#)

[Modify the shape, grade, dimensions, or length of multiple requisition items \(page 49\)](#)

2.8 Delete requisition items

You can delete any unnecessary items from the requisition. Note that deleting requisition items is permanent and cannot be undone.

You can still see the deleted items in the list of changes. For more information, see [View all changes in a requisition \(page 53\)](#).

1. In the **Requisition #** dialog box, select the requisition items that you want to delete.

To select multiple items, hold down **Ctrl**.

To select a range of subsequent items, hold down **Shift**.

Note that if the requisition item that you want to delete has been combined, you first need to uncombine the item by clicking **Uncombine**. The **Delete** button appears when the item has been uncombined.

2. At the bottom of the dialog box, click **Delete**.
3. To permanently delete the requisition items, click **Yes** in the confirmation dialog box.

2.9 View the pricing history of a requisition item

Use the **Purchase History** command to view the pricing history of a material item. You can filter the purchase history by various options, such as the vendor, the requisition number, or the length.

1. In the **Requisition #** dialog box, select the material item whose pricing history you want to view.
2. Click the **Requisition** ribbon tab.
3. In the menu, select **Purchase History**.

The **Purchase Order History** dialog box opens.

Vendor	PO #	P...	Qty	Sh...	Dimensions	Length	Gr...	Base P...	Price	Wei...	Weight
Tekla - Supplier	000000(	2/14/20	4	PL	1/8 x 6	0'-8	A36	25.00/CWT	\$1.70	2#	7#
Tekla - Supplier	000000(	2/14/20	8	PL	1/4 x 5 1/2	2'-5 3/4	A36	25.00/CWT	\$23.20	12#	93#
Tekla - Supplier	000000(	2/14/20	2	PL	1/4 x 6	1'-1 1/4	A36	25.00/CWT	\$2.82	6#	11#
Tekla - Supplier	000000(	2/14/20	4	PL	1/4 x 6	1'-1 1/4	A36	25.00/CWT	\$5.64	6#	23#
Tekla - Supplier	000000(	2/14/20	12	PL	3/8 x 2 1/2	0'-2 1/2	A36	25.00/CWT	\$1.99	1#	8#
Tekla - Supplier	000000(	2/14/20	9	PL	3/8 x 5	0'-8 1/2	A36	25.00/CWT	\$10.17	5#	41#
Tekla - Supplier	000000(	2/14/20	2	PL	3/8 x 5	0'-9	A36	25.00/CWT	\$2.39	5#	10#
Tekla - Supplier	000000(	2/14/20	2	PL	3/8 x 5 1/2	0'-8 1/2	A36	25.00/CWT	\$2.49	5#	10#
Tekla - Supplier	000000(	2/14/20	2	PL	3/8 x 5 1/2	0'-10	A36	25.00/CWT	\$2.92	6#	12#
Tekla - Supplier	000000(	2/14/20	6	PL	3/8 x 6	0'-6	A36	25.00/CWT	\$5.74	4#	23#
Tekla - Supplier	000000(	2/14/20	6	PL	3/8 x 6	0'-8 1/2	A36	25.00/CWT	\$8.14	5#	33#
Tekla - Supplier	000000(	2/14/20	1	PL	3/8 x 7 7/8	0'-11 5/8	A36	25.00/CWT	\$2.43	10#	10#
Tekla - Supplier	000000(	2/14/20	1	PL	3/8 x 7 7/8	1'-1 1/4	A36	25.00/CWT	\$2.77	11#	11#
Tekla - Supplier	000000(	2/14/20	4	PL	3/8 x 8	1'-0 1/2	A36	25.00/CWT	\$10.63	11#	43#
Tekla - Supplier	000000(	2/14/20	1	PL	3/8 x 9 1/8	1'-4 1/2	A36	25.00/CWT	\$4.00	16#	16#

The top section of the dialog box allows you to filter the pricing history information, whereas the bottom section shows the pricing history of the material item.

4. If necessary, filter the pricing history by clicking arrows on the right side of the different filter lists and selecting filtering options in the lists.
5. To update the pricing history to match the filters you set, click **Load History**.
6. If you want to save the pricing history as a Microsoft Excel worksheet, do the following:
 - a. Right-click anywhere in the display area of the **Purchase Order History** dialog box.
 - b. In the context menu, select **Export to Excel**.
 - c. In the **Save As** dialog box, browse to the folder where you want to save the file.
 - d. If necessary, modify the file name.
 - e. Click **Save**.

If necessary, you can customize the layout of the **Purchase Order History** dialog box to include only the when exporting the pricing history. For more information, see .

7. To close the **Purchase Order History** dialog box, click the **Close** button (X) in the upper-right corner.

See also

[View all changes in a requisition \(page 53\)](#)

[Update pricing information \(page 60\)](#)

2.10 View all changes in a requisition

Tekla EPM records every change made in the system. This is useful because you can view all changes made in the current requisition at once. You can filter the information to see changes made by a particular user, or on a particular date. You can also print the list of changes.

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **List Of Changes**.
3. In the **Report Filter** dialog box, do any of the following according to your needs:

To	Do this
Filter changes by user	<ol style="list-style-type: none">a. Click Edit on the right side of the User section.b. Click the arrow buttons to move the users whose changes you want to view to the Included list.c. Click OK.
Filter changes by date	<ol style="list-style-type: none">a. Click Edit on the right side of the Date section.b. Enter the start (Min) and end (Max) dates.c. Click OK.

4. Click **Make Report**.
5. In the **Report Progress** dialog box, do one of the following according to your needs:

To	Do this
View the list of changes	<ul style="list-style-type: none">• Click View. <p>The report opens in Tekla EPM Report Viewer. You can use the Email Excel and Email PDF buttons at the top of the Tekla EPM Report Viewer window to email the report via Microsoft Outlook.</p>
Print the list of changes	<ol style="list-style-type: none">a. Change the number of the printed copies by clicking the + and - buttons.

To	Do this
	<ul style="list-style-type: none"> b. Click Print. c. In the Select Printer dialog box, click a printer to select it. d. Click OK.

6. To close the dialog box, click the **Close** button (X) in the upper-right corner.

2.11 Load requisition items into a purchase order

Use the **Load Material Into Purchase Order** and **Load Selected Material Into Purchase Order** commands to load material items from a requisition to a purchase order. Use the **Load Material Into Purchase Order** command to load all requisition items into a purchase order, or use the **Load Selected Material Into Purchase Order** command to select the items in a requisition that are loaded into a purchase order. When you load material items into a purchase order, the items become available in the inventory.

According to your needs, see any of the following instructions:

Load all items into a purchase order

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Load Material Into Purchase Order**.
3. In the **Select Purchase Order** dialog box, select a purchase order and click **OK**.
If necessary, you can also create a new purchase order and load the items into it.
4. To only load specific types of items to the purchase order, in the **Purchasing Import Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the properties of the items that you want to load to the purchase order to the **Included** list.
 - Type the maximum and minimum values for the items that you want to load to the purchase order.

6. Click **OK**.

To further limit which items are loaded to the purchase order, repeat steps 4 to 6 for all necessary filter types.

7. Click **Import**.

8. Click **OK** to close the **Import Items** dialog box.

The material items are loaded to the selected purchase order, so they are no longer visible in the **Requisition #** dialog box.

Load selected items into a purchase order

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Load Selected Material Into Purchase Order**.
3. In the **Select Purchase Order** dialog box, select a purchase order and click **OK**.
If necessary, you can also create a new purchase order and load the items into it.
4. In the **Enter Value** dialog box, type the quantity of pieces that you want to load to the purchase order.
5. Click **OK**.
6. Click **OK** to close the **Import Items** dialog box.

2.12 Export a request for pricing

A request for pricing allows you to get pricing from multiple suppliers. Use the **Export Request for Pricing** commands to save a request for pricing as an Microsoft Excel worksheet or a steelXML file and send it to suppliers. You can also attach the request for pricing to an email and send it to a supplier using Microsoft Outlook. Once you receive responses, you can import the suppliers' pricing information to Tekla EPM.

According to your needs, see any of the following instructions:

Save a request for pricing as a Microsoft Excel worksheet

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Export Request for Pricing --> Export to Excel**.

3. In the **Save As** dialog box, browse to the folder where you want to save the file.

By default, Tekla EPM saves the file to the **Export** folder.

4. If necessary, modify the file name.
5. Click **Save**.

To modify the request for pricing in Microsoft Excel, see [Modify pricing information in Microsoft Excel \(page 57\)](#).

Email a request for pricing as a Microsoft Excel worksheet

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Export Request for Pricing --> Email Excel**.
3. In the **Select Contact** dialog box, select the supplier, supplier code, and contact person.

Only companies whose type is set to **Supplier** and their contacts that are saved in the **Address Book** are available.

Defining the information in the **Select Contact** dialog box is optional. You can also define the information directly in the email when it is created.

4. In the **Email** field, type the email address of the contact person.
5. Click **OK**.

Microsoft Outlook opens. The Microsoft Excel worksheet is attached to a new email.

6. Modify the email according to your needs.
7. Send the email.

Save or email a request for pricing as an steelXML file

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Export Request for Pricing --> Export to steelXML**.
3. In the **Export Pricing** dialog box, select the supplier, supplier code, and contact person.

Only companies whose type is set to **Supplier** and their contacts that are saved in the **Address Book** are available.

Defining the information in the **Export Pricing** dialog box is optional.

4. If you want the supplier to provide you with the nested result, select the **Request Nested Results** check box.

5. According to your needs, do one of the following:

To	Do this
Save the steelXML file	<ul style="list-style-type: none">a. Click Export.b. In the Save As dialog box, browse to the folder where you want to save the file. By default, Tekla EPM saves the file to the Export folder.c. If necessary, modify the file name.d. Click Save.
Send the steelXML file by email	<ul style="list-style-type: none">a. In the Email field, type the email address of the contact person.b. Select the Attach to Email check box.c. Click Export. Microsoft Outlook opens. The steelXML file is attached to a new email.d. Modify the email according to your needs.e. Send the email.

Modify pricing information in Microsoft Excel

When you have saved or received a request for pricing as a Microsoft Excel worksheet, you can modify the pricing in Microsoft Excel. After making the changes, you or your client can import the pricing information back to Tekla EPM.

1. In Microsoft Excel, type the prices for items in the **Base Price** column.
To import the pricing information correctly, type the prices in the following format: `currency price/unit`. For example, \$56.99/CWT.
You only need to define the base prices of items. Tekla EPM calculates the total price during the import.
2. If necessary, type the total prices for items in the **Total Price** field.
3. Save the Microsoft Excel worksheet.

See also

[Export a request for pricing \(page 55\)](#)

[Import pricing information to a requisition \(page 57\)](#)

2.13 Import pricing information to a requisition

Use the **Import Requisition Pricing** commands to import the pricing information that you want to use in the current requisition from a steelXML file or a Microsoft Excel worksheet. You can also import pricing from an email attachment that is either a Microsoft Excel worksheet or a steelXML file. New pricing information can be imported multiple times, if necessary.

Note that if you want to re-use the imported pricing information later, you also need to update the pricing information to a pricing database. For more information, see [Update pricing information \(page 60\)](#).

Import pricing information from an Excel worksheet

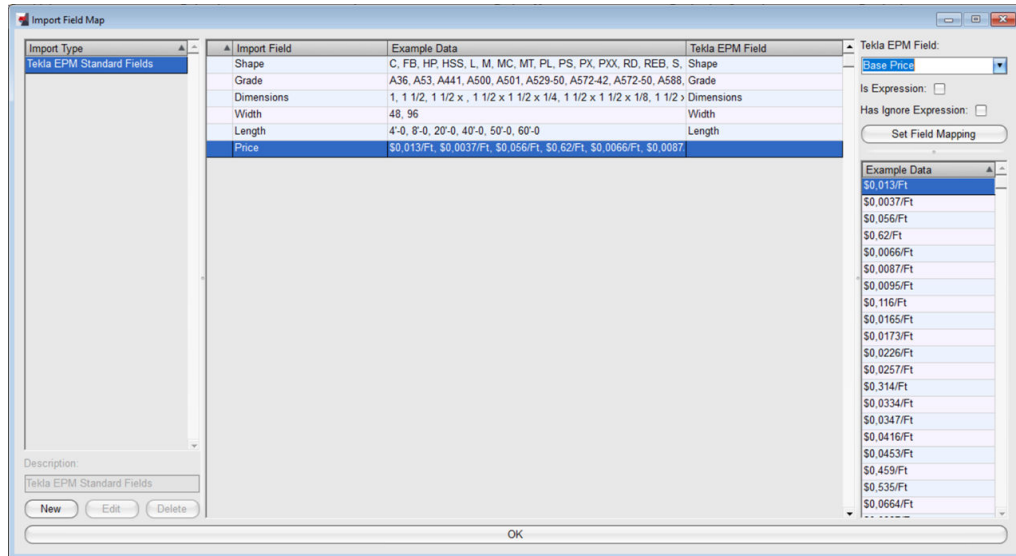
1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Import Requisition Pricing --> Import Pricing From Excel File**.
3. In the **Open** dialog box, browse to find the worksheet from which you want to import the pricing information.
4. Select the worksheet, and click **Open**.
5. In the **Verify Excel Import Data** dialog box, verify that the information is correct.

Row	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
1	Shape	Grade	Dimensions	Width	Length	Price
2						
3	C	A36	3 x 3.5		20'-0	\$25.60/CWT
4	C	A36	3 x 3.5		40'-0	\$25.60/CWT
5	C	A36	3 x 3.5		60'-0	\$25.60/CWT
6	C	A529-50	3 x 3.5		20'-0	\$25.60/CWT
7	C	A529-50	3 x 3.5		40'-0	\$25.60/CWT
8	C	A529-50	3 x 3.5		60'-0	\$25.60/CWT
9	C	A572-50	3 x 3.5		20'-0	\$25.60/CWT
10	C	A572-50	3 x 3.5		40'-0	\$25.60/CWT
11	C	A572-50	3 x 3.5		60'-0	\$25.60/CWT
12	C	A588	3 x 3.5		20'-0	\$25.60/CWT
13	C	A588	3 x 3.5		40'-0	\$25.60/CWT
14	C	A588	3 x 3.5		60'-0	\$25.60/CWT
15	C	A36	3 x 4.1		20'-0	\$25.60/CWT
16	C	A36	3 x 4.1		40'-0	\$25.60/CWT
17	C	A36	3 x 4.1		60'-0	\$25.60/CWT
18	C	A529-50	3 x 4.1		20'-0	\$25.60/CWT
19	C	A529-50	3 x 4.1		40'-0	\$25.60/CWT
20	C	A529-50	3 x 4.1		60'-0	\$25.60/CWT
21	C	A572-50	3 x 4.1		20'-0	\$25.60/CWT
22	C	A572-50	3 x 4.1		40'-0	\$25.60/CWT

If you want to exclude information on particular rows from being imported, you can double-click the rows.

6. Click **OK**.

The **Import Field Map** dialog box opens. In the dialog box, the headings of the Excel worksheet need to be mapped to the Tekla EPM standard field headings.



7. If the values of an item in the **Import Field** and **Tekla EPM Field** columns do not match or are not correct, do the following:
 - a. Select the unmatched **Import Field** value.
 - b. On the right side of the dialog box, select a suitable field in the **Tekla EPM Field** list.
 - c. Click **Set Field Mapping**.
8. When you have mapped all fields together, click **OK** to continue.
9. In the **Import** dialog box, view the status of the import process.
To view the import process as a text file, you can click **Open Import Log**.
10. To close the **Import** dialog box, click the **Close** button (X) in the upper-right corner.

Import pricing information from an XML file

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Import Requisition Pricing --> Import Pricing From steelXML File**.
3. In the **Open** dialog box, browse to find the file from which you want to import the pricing information.
4. Select the file, and click **Open**.
5. In the **Import** dialog box, view the status of the import process.
To view the import process as a text file, you can click **Open Import Log**.

6. To close the **Import** dialog box, click the **Close** button (X) in the upper-right corner.

Import pricing information from an email attachment

Note that you can only import pricing information from email attachments if you are using Microsoft Outlook.

1. In Microsoft Outlook, select the email whose attachments you want to import.
2. In the **Import** dialog box, view the status of the import process.
To view the import process as a text file, you can click **Open Import Log**.
3. To close the **Import** dialog box, click the **Close** button (X) in the upper-right corner.

2.14 Update pricing information

Use the **Update Pricing Maintenance** command to update the pricing of material items in a requisition to pricing maintenance as well. This way, the pricing that you set in the requisition can be re-used in the future. You can update the pricing information to either the global pricing or the estimate-specific pricing.

1. In the **Requisition #** dialog box, select the material items whose current pricing information you want to update.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
2. In the menu, select **Update Pricing Maintenance**.

3. In the **Pricing Update** dialog box, do one of the following:

To	Do this
Update pricing to the global pricing	<ol style="list-style-type: none"> a. At the top of the dialog box, select the Update Global Pricing option. b. Click the arrow on the right side of the Supplier to Update list and select the supplier whose pricing information you want to update.
Update pricing to the estimate-specific pricing	<ol style="list-style-type: none"> a. At the top of the dialog box, select the Update Estimate-Specific Pricing option. b. Click the arrow on the right side of the Estimate to Update list and select the estimate whose pricing information you want to update.

4. If you want to update the pricing of all material items within a previously created global edit form, click the arrow on the right side of the **Global Edit Form** list, and select the global edit form that you want to use.
5. Do one of the following to exclude items from being updated to the pricing database:
 - Select an item whose pricing information you do not want to update, and click **Exclude**.

- To exclude all items, click **Exclude All**.

You can re-include the excluded items by clicking the **Include** and **Include All** buttons.

6. Click **Update Pricing**.
7. To confirm updating the pricing information, click **Yes** in the confirmation dialog box.

The pricing information is updated to the selected location, and the **Pricing Update** dialog box closes.

If the material shape, grade, or dimension does not exist in the pricing maintenance database, it is added to the database when you update the pricing.

See also

[View the pricing history of a requisition item \(page 51\)](#)

2.15 Combine items in the Requisition # dialog box

Use the **Combine** command to mult and nest requisition items. Combining requisition items creates a list of materials that you can later send out for pricing.

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Combine**.

The **Select Combining Run** dialog box opens. When you are performing the first combining run for a combining job, the list in the dialog box is empty.

3. Click a desired combining option to select it.

The options are:

- **Mult**: combines linear items, like beams and angles.
- **Nest**: combines items that have area, like plates or gratings.
- **Mult & Nest**: combines all items.

The **Combining Run Filters** dialog box opens.

NOTE Filtering items is optional, so you can skip steps 4 to 7 if you do not want to filter out items from the combining run.

4. To only combine specific types of materials, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:

- Click the arrow buttons to move the items that you want to combine to the **Included** list.
 - Type the maximum and minimum values for the items that you want to combine.
6. Click **OK** to apply the filter.
Repeat steps 4 to 6 for each filter type that you want to set.
 7. To ensure that you are using the correct settings, click the **Optimizations**, **INV Filter**, and **Suppliers** buttons.
If necessary, you can modify the settings.
 8. To combine the materials, click the button at the bottom of the **Combining Run Filters** dialog box, or press **F4**.
 - Piece mark items included with the selected stock lengths are displayed at the lower-left section of the dialog box.
 - Combining results are shown in both the display area and in the summary grid at the lower-right section of the dialog box.
 - The material cost represents the pricing of the materials in the pricing database that was used in the combining run.

To save the combining run, click one of the following:

- **Save Combining Run:** saves the combining run as a snapshot that you can later view by selecting it in the **Select Combining Run** dialog box. No cut lists are generated.
- **Save Displayed Results & Close:** completes the requisition combining run, saves the displayed combining run results, and returns to the **Requisition #** dialog box.

The material items that were combined to existing inventory items are removed from the requisition and disappear from the **Requisition #** dialog box. The items that were combined to the supplier materials remain in the requisition until you send the items to a purchase order.

See also

[Combine requisition items manually \(page 63\)](#)

Combine requisition items manually

To combine the selected material lengths manually, you need to activate the manual combine mode. You can then select pieces to combine them into a specific material length, or uncombine pieces from a material length.

Note that you can only manually combine items that have been created manually or by copying existing items in the manual combine mode. These

items are marked with a **C** in the leftmost column of the **Requisition #** dialog box.

1. In the upper-left corner of the **Requisition #** dialog box, click **Manual Combine Mode**.

The manual combine mode is activated.

2. Select the material item to which you want to combine new items.
3. At the bottom of the dialog box, click **Add Items**.

The **Add Item** dialog box opens. You can see all available uncombined materials that can be combined into the selected length.

Tekla EPM notifies you if there are no materials available to be combined. In this case, you need to uncombine some previously combined material items by selecting the items and clicking the **Uncombine** button at the bottom of the **Requisition #** dialog box.

4. In the **Add Item** dialog box, click an uncombined item to select it.
5. If necessary, modify the quantity of inventory items that you are combining materials to.
If the quantity is greater than 1, the materials should be multiples of that quantity in order to be displayed and selected in the **Add Item** dialog box.
6. To allow material grade substitutions, select the **Use Grade Substitutions** check box.
7. Click **Add**.

The selected uncombined pieces are now combined into the selected material item.

To return to input mode, click **Input Mode** in the upper-left corner of the **Requisition #** dialog box.

See also

[Combine items in the Requisition # dialog box \(page 62\)](#)

2.16 View, print, or export requisition-specific reports

You can create various reports based on the current requisition. After creating a report, you can view or print the report, or export the report and save it in another file format.

To create requisition reports, do the following:

1. In the **Requisition #** dialog box, click the **Requisition** ribbon tab.
2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.

3. To only include specific item types in the reports, in the **Requisition Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the item properties that you want to include in the reports to the **Included** list.
 - Type the maximum and minimum values for the item properties that you want to include in the reports.
5. Click **OK**.

To further limit the requisitions included in the reports, repeat steps 3 to 5 for all filter types.
6. Click **Make Report**.
7. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

According to your needs, see any of the following instructions:

View the report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the selected report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the report

1. Click **Export**.
2. In the **Export Format** list, select an export format.

3. Click **Browse**.
4. Modify the file name according to your needs.
5. Browse to the location where you want to save the exported file, and click **Save**.
6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

2.17 Delete requisitions

You can delete unnecessary requisitions in the **Select Requisition/Purchase Order** dialog box.

NOTE When you delete a requisition, all material items in the requisition are also deleted.

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Requisitions** tab.
3. Select the requisitions that you want to delete.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
4. At the bottom of the dialog box, click **Delete**.
5. To permanently delete the requisitions, click **Yes** in the confirmation dialog box.

3 Create and manage purchase orders

On the **Purchase Orders** part of the **Purchasing** module, you can create and modify purchase orders and material items within the purchase orders.

We recommend that you plan the numbering of purchase orders carefully to help you organize the purchase orders in the future.

You can also:

- Receive and un-receive materials.
- Filter the information displayed in the purchase order.
- Approve a purchase order, so that no further changes can be made.
- Finalize material items, so that no changes can be made to the items.
- Un-finalize items to allow making changes to them again.
- Copy material items to another purchase order.
- View the pricing history of a material item.
- View the transaction history of a purchase order.
- View the heat documents attached to material items.
- View all changes made to a purchase order.
- Create purchase order reports and receiving reports, and view, print, or export the created reports.
- Export purchase order information to a selected accounting software.

All material items on purchase orders are also visible in the inventory as items that are on order.

For more information, see the following links:

[Create a purchase order \(page 68\)](#)

[Open a purchase order \(page 73\)](#)

[Modify a purchase order \(page 74\)](#)

[Store document references for a purchase order \(page 78\)](#)
[Filter information in the PO # dialog box \(page 79\)](#)
[Add a purchase order item \(page 80\)](#)
[Copy a purchase order item \(page 84\)](#)
[Copy material items to another purchase order \(page 84\)](#)
[Modify purchase order items \(page 85\)](#)
[Receive purchase order items \(page 89\)](#)
[View heat documents attached to purchase order items \(page 95\)](#)
[Send purchase order items to a requisition \(page 97\)](#)
[Finalize purchase order items \(page 100\)](#)
[Delete purchase order items \(page 101\)](#)
[View all changes in a purchase order \(page 102\)](#)
[View the transaction history of a purchase order \(page 103\)](#)
[View the pricing history of a material item \(page 98\)](#)
[View, print, or export purchase order reports \(page 105\)](#)
[View, print, or export job-specific receiving reports \(page 106\)](#)
[Approve a purchase order \(page 108\)](#)
[Delete purchase orders \(page 109\)](#)

3.1 Create a purchase order

To create a new purchase order where material items can be stored, do the following:

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Purchase Orders** tab.
3. Click **Add**.

Purchase Order Edit: [New]

General Vendor Ship To/Bill To Remarks Top Text Financial Other

P.O. Date: 2/20/2019 Reference #: 1234

P.O. Number: 0000000008 Job: Tekla-1234

Job Location: Kennesaw, Georgia

Ordered By: Administrator

P.O. Group: [] []

Item Increment: 10

P.O. Type: Recurring

Shipping Method: Counter Pickup

F.O.B.: Destination

Save (F4)

- On the **General** tab of the **Purchase Order Edit** dialog box, type the purchase order number.

We recommend that you plan the numbering of purchase orders carefully to help you organize the purchase orders in the future. The purchase order number cannot be changed later. All other purchase order information can be modified later, if necessary.

- Define the remaining general properties.

The properties marked with an asterisk (*) are mandatory information.

Option	Description
P.O. Date *	<p>The date of the purchase order.</p> <p>Tekla EPM automatically uses the current date. To change the date, do one of the following:</p> <ul style="list-style-type: none"> Type the date in the P.O. Date field. <p>The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.</p> <ul style="list-style-type: none"> Click the arrow on the right side of the P.O. Date field and select a date in the calendar.
Reference #	<p>Type any reference number related to the purchase order in the Reference # field.</p>

Option	Description
Job	Type any job number related to the purchase order in the Job field.
Job Location	Type any job location related to the purchase order in the Job Location field.
Ordered By	The Tekla EPM user in your company that created the purchase order. Click the arrow on the right side of the Ordered By list, and select a user in the list.
P.O. Group	The groups where the purchase order belongs to. Setting purchase order groups for the purchase order helps you to sort purchase orders in the Select Requisition/Purchase Order dialog box. To set purchase order groups, do one of the following: <ul style="list-style-type: none"> Type new purchase order group names in the P.O. Group fields. Click the arrows on the right side of the P.O. Group fields, and select existing purchase order groups in the lists.
Item Increment	Sets the auto-increment for item numbers in the purchase order. The auto-increment allows the items to be added in the list according to your needs, without you having to renumber the other items in the purchase order. For example, if items should be numbered as 10, 20, 30, ..., the input increment should be set to 10. If auto-increment of item numbers is not necessary, type 1 in the Item Increment field.
P.O. Type	The type of the purchase order. The available options are set in PO Type Maintenance . For more information, see Add, modify, or delete purchase order types (page 19) . Click the arrow on the right side of the P.O. Type list and select a type in the list.
Shipping Method	The shipping method of the purchase order. The available options are set in Purchase Order Shipping Method Maintenance . For more

Option	Description
	information, see Add, modify, and delete shipping methods for purchase orders (page 20) . Click the arrow on the right side of the Shipping Method list and select a method in the list.
F.O.B.	The free on board shipping destination applied to the purchase order. The available options are set in Purchase Order FOB Maintenance . For more information, see Add, modify, or delete FOB shipping destinations (page 21) .

6. On the **Vendor** tab, select the vendor, the address, the contact person, and the person with whom the purchase order has been confirmed.

Note that only companies that are saved in the **Address Book** with the firm type **Supplier** and their contact persons can be selected.
7. If you have added additional currencies to Tekla EPM, select the currency and exchange rate date for the purchase order.
8. On the **Ship To/Bill To** tab, select the correct shipping and billing addresses of your company.

Note that only companies that are saved in the **Address Book** with the **Client** or **My Company** company types can be selected.

If necessary, you can modify the information on the **Ship To/Bill To** tab manually.

9. If necessary, click the arrows on the right side of the **Inventory Location** and **Secondary Location** fields to define the inventory location of the purchase order items.
10. On the **Remarks** tab, do either of the following:
 - Click the arrows on the right side of the blank fields and select previously created remarks in the lists.
 - Type remarks in the blank fields.

You can add up to four remarks. The available remark options are set in the **Purchase Order Remark Maintenance** dialog box. For more information, see [Add, modify, or delete purchase order remarks \(page 23\)](#).

You can also set default remarks that are added for all new purchase orders in the **Purchase Order Company Standards** dialog box. For more information, see [Define company standard settings for purchase orders \(page 14\)](#).

11. On the **Top Text** tab, to define which information you want to add at the top of the purchase order, do either of the following:

- Click the arrow on the right side of the **Description** field, and select a previously created top text item in the list.

The **Top Text** field is automatically populated.

- Type any necessary information in the **Top Text** field.

Note that any text you type manually in the **Top Text** is not saved, so it cannot be re-used.

You can create top text items in the **Purchase Order Top Text Maintenance** dialog box. For more information, see [Add, modify, or delete top text items \(page 24\)](#).

You can also set default top text items that are added for all new purchase orders in the **Purchase Order Company Standards** dialog box. For more information, see [Define company standard settings for purchase orders \(page 14\)](#).

12. On the **Financial** tab, define the freight and adjustment costs, the payment terms, and the discount percentage used in the purchase order.

The available payment term options are set in the **Purchase Order Payment Term Maintenance** dialog box. For more information, see [Add, modify, or delete payment terms for purchase orders \(page 22\)](#).

Note that the adjustment costs can also be negative.

13. If necessary, apply tax rates to the purchase order as follows:

- a. On the **Financial** tab, click **Tax Rates**.
- b. In the **Select Tax Rates** dialog box, click the arrow buttons to move the tax rates that you want to apply to the purchase order to the **Included** list.
- c. Click **OK**.

You can create any necessary tax rates and tax groups by clicking the **Maintenance** ribbon tab and selecting **Tax Rates** in the menu.

14. On the **Other** tab, add any applicable information to the blank fields.

For example, you can add information about the maximum lift or the unload instructions.

15. If necessary, click the **Input/Display Units** button to adjust the units used in the purchase order.

For more information, see [Define company standard settings for purchase orders \(page 14\)](#).

16. Click **Save** to create the purchase order.

The **Purchase Order Edit** dialog box closes, and the new purchase order is added to the **Select Requisition/Purchase Order** dialog box.

- Open a purchase order (page 73)
- Modify a purchase order (page 74)
- Delete purchase orders (page 109)

To view and modify the material items in a purchase order, you need to open the purchase order.

- The **PO #** dialog box opens:

(1) The summary grid: shows the following information number of purchase order items, their length, square feet, weight, surface area, and cost for items. These properties are shown for:

- a single piece of the selected item

- the selected items
- the currently displayed items
- the entire purchase order

(2) The mode switch button: the **PO #** dialog box has two modes: the input mode and the receive mode. In the input mode, you can add new material items and modify the existing ones. In the receive mode, you can mark material items as received or rejected.

To change the mode, click the button in the upper-left corner.

(3) The display area: shows all material items in the purchase order.

The visible columns and details are set in the **Display Fields** dialog box. You can access the **Display Fields** dialog box via **Maintenance --> Purchase Orders --> Edit Display Fields**.

You can also modify the visible columns and the dialog box layout by right-clicking in the display area and selecting **Customize grid** in the context menu.

Note that a **C** in the leftmost column indicates that the material items have been combined.

(4) The input area: allows you to add properties for new material items and modify properties of existing material items. You can mark material items as received, rejected, or canceled.

When you select an item in the display area, its properties automatically populate the input fields.

The visible columns and details are set in the **Input Fields** dialog box. You can access the **Input Fields** dialog box via **Maintenance --> Purchase Orders --> Edit Input Fields**.

(5) The navigation tree: allows you to only view specific items in the purchase order.

Click **+** to expand and select options in the navigation tree. When you select an option, only material items that match the selected properties are displayed in the display area.

For example, you can expand **Shape** and select **HSS** to only display hollow structural sections.

(6) Quantities received, rejected, and canceled: shows the material order information of the item selected in the display area. You can view the quantity of pieces that have been received, rejected, and canceled.

3.3 Modify a purchase order

You can modify all properties of a purchase order at any time, except for the purchase order number.

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Purchase Orders** tab.
3. Select the purchase order that you want to modify.
4. Click **Edit**.
5. On the **General** tab of the **Purchase Order Edit** dialog box, modify the general properties.

The properties marked with an asterisk (*) are mandatory information.

Option	Description
P.O. Date *	<p>The date of the purchase order.</p> <p>Tekla EPM automatically uses the current date. To change the date, do one of the following:</p> <ul style="list-style-type: none"> • Type the date in the P.O. Date field. The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY. • Click the arrow on the right side of the P.O. Date field and select a date in the calendar.
Reference #	Type any reference number related to the purchase order in the Reference # field.
Job	Type any job number related to the purchase order in the Job field.
Job Location	Type any job location related to the purchase order in the Job Location field.
Ordered By	<p>The Tekla EPM user in your company that created the purchase order.</p> <p>Click the arrow on the right side of the Ordered By list, and select a user in the list.</p>
P.O. Group	<p>The groups where the purchase order belongs to.</p> <p>Setting purchase order groups for the purchase order helps you to sort purchase orders in the Select Requisition/Purchase Order dialog box.</p> <p>To set purchase order groups, do one of the following:</p> <ul style="list-style-type: none"> • Type new purchase order group names in the P.O. Group fields. • Click the arrows on the right side of the P.O. Group fields, and select existing purchase order groups in the lists.

Option	Description
Item Increment	<p>Sets the auto-increment for item numbers in the purchase order.</p> <p>The auto-increment allows the items to be added in the list according to your needs, without you having to renumber the other items in the purchase order.</p> <p>For example, if items should be numbered as 10, 20, 30, ..., the input increment should be set to 10. If auto-increment of item numbers is not necessary, type 1 in the Item Increment field.</p>
P.O. Type	<p>The type of the purchase order.</p> <p>The available options are set in PO Type Maintenance. For more information, see Add, modify, or delete purchase order types (page 19).</p> <p>Click the arrow on the right side of the P.O. Type list and select a type in the list.</p>
Shipping Method	<p>The shipping method of the purchase order.</p> <p>The available options are set in Purchase Order Shipping Method Maintenance. For more information, see Add, modify, and delete shipping methods for purchase orders (page 20).</p> <p>Click the arrow on the right side of the Shipping Method list and select a method in the list.</p>
F.O.B.	<p>The free on board shipping destination applied to the purchase order.</p> <p>The available options are set in Purchase Order FOB Maintenance. For more information, see Add, modify, or delete FOB shipping destinations (page 21).</p>

6. On the **Vendor** tab, select the vendor, the address, the contact person, and the person with whom the purchase order has been confirmed.
Note that only companies that are saved in the **Address Book** with the firm type **Supplier** and their contact persons can be selected.
7. If you have added additional currencies to Tekla EPM, select the currency and exchange rate date for the purchase order.
8. On the **Ship To/Bill To** tab, modify the shipping and billing addresses of your company.

Note that only companies that are saved in the **Address Book** with the **Client** or **My Company** company types can be selected.

If necessary, you can modify the information on the **Ship To/Bill To** tab manually.

9. If necessary, click the arrows on the right side of the **Inventory Location** and **Secondary Location** fields to define the inventory location of the purchase order items.

10. On the **Remarks** tab, do either of the following:

- Modify the remarks by typing in the fields.
- Click the arrows on the right side of the fields and select previously created remarks in the lists.

You can add up to four remarks. The available remark options are set in the **Purchase Order Remark Maintenance** dialog box. For more information, see [Add, modify, or delete purchase order remarks \(page 23\)](#).

11. On the **Top Text** tab, to modify the information that you want to add at the top of the purchase order, do either of the following:

- Click the arrow on the right side of the **Description** field, and select a previously created top text item in the list.

The **Top Text** field is automatically populated.

- Type any necessary information in the **Top Text** field.

Note that any text you type manually in the **Top Text** is not saved, so it cannot be re-used.

You can create top text items in the **Purchase Order Top Text Maintenance** dialog box. For more information, see [Add, modify, or delete top text items \(page 24\)](#).

You can also set default top text items that are added for all new purchase orders in the **Purchase Order Company Standards** dialog box. For more information, see [Define company standard settings for purchase orders \(page 14\)](#).

12. On the **Financial** tab, modify the freight and adjustment costs, the payment terms, and the discount percentage used in the purchase order.

The available payment term options are set in the **Purchase Order Payment Term Maintenance** dialog box. For more information, see [Add, modify, or delete payment terms for purchase orders \(page 22\)](#).

Note that the adjustment costs can also be negative.

13. If necessary, modify the tax rates applied to the purchase order as follows:

- a. On the **Financial** tab, click **Tax Rates**.
- b. In the **Select Tax Rates** dialog box, click the arrow buttons to move the tax rates that you want to apply to the purchase order to the **Included** list.

- c. Click **OK**.
14. On the **Other** tab, modify the information to the blank fields.
For example, you can add information about the maximum lift or the unload instructions.
15. If necessary, click the **Input/Display Units** button to adjust the units used in the purchase order.
For more information, see [Define company standard settings for purchase orders \(page 14\)](#).
16. Click **Save** to update the purchase order.

See also

[Create a purchase order \(page 68\)](#)

[Open a purchase order \(page 73\)](#)

[Store document references for a purchase order \(page 78\)](#)

[Delete purchase orders \(page 109\)](#)

3.4 Store document references for a purchase order

Document Index is where you can store documents for reference. When you store documents in **Document Index**, each user that has access to the purchase order can view them, so it is easy to keep up to date on the purchase order status. You can save any documents, such as packing slips and heat documents, and Microsoft Outlook emails in **Document Index**.

NOTE You should always save heat documents in the **Heat Documents** category in **Document Index**. The **Heat Documents** category differs from other document categories in that it maintains a link to the heat document for all items that share the same supplier, purchase order number, and heat number.

To access **Document Index**, do the following:

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Purchase Orders** tab.
3. Select the purchase order for which you want to add document references.
4. Click **Doc Ind**.

The **Document Index** dialog box opens. Next, you can either modify the available folders for document references, or add, modify, delete, open, and email document reference files.

See also

[Manage document reference categories \(page 34\)](#)

[Open a document reference \(page 36\)](#)

[Add document references for estimating jobs \(page 36\)](#)

[Modify a document reference \(page 40\)](#)

[Attach a document reference to an email \(page 41\)](#)

[Delete a document reference \(page 42\)](#)

3.5 Filter information in the PO # dialog box

Use the **Filter** command to create filters that are commonly used in the **PO #** dialog box. For example, you can create filters to only display the items that have been received. You can also save the filters for later use.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Filter**.
3. To filter the displayed items according to selected criteria, in the **Purchase Order Filters** dialog box, select a filter type in the **Type** list, and click **Select**.

Note that if you have saved a filter in the **Purchase Order Report Filters** dialog box when creating global receiving reports, the saved filter will also be available as a filter in the **PO #** dialog box for all purchase orders.

4. In the **Filter** dialog box, click the arrow buttons to move the items that you want to display to the **Included** list.
5. Click **OK**.

If you want to further filter the information displayed in the **PO #** dialog box, repeat steps 3 to 5 for different items.

If you want to clear all filter settings, click **Reset**.

6. To save commonly used filters, do the following:
 - a. Click **Filter Types** in the lower-left corner.
 - b. Click **New**.
 - c. Type a description for the filter type.
 - d. Create the filter settings.

For more information, see steps 3 to 5.
 - e. Click **Add**.

- f. To close the dialog box, click the **Close** button (X) in the upper-right corner.

The newly created filter type is selected in the **Filter Types** list.

- g. To apply the filter type, click **Set**.

7. According to your needs, do one of the following:

- To use the filter, click **Apply Filter**.
- To use the filter in the job and save it until a new filter is set or the filter is cleared, click **Apply Filter & Save**.

Note that the filter will remain in use even if you close and re-open the job. After you clear the filters, the filter settings cannot be used again.

The **Purchase Order Filters** dialog box closes, and the **PO #** dialog box is filtered according to the filter you applied.

TIP To display all information in the **PO #** dialog box again, click **Clear Filters** at the top of the **PO #** dialog box.

3.6 Add a purchase order item

Most items are added to purchase orders by loading the material items from combining, estimating, or production control jobs to purchase orders. You can also add new items to an open purchase order manually.

Note that all material items on purchase orders are also inventory items.

1. In the **PO #** dialog box, click **New**.
2. Define the item properties.

NOTE The visible input fields and their order are set in the **Input Fields** dialog box. To access the dialog box, go to **Maintenance --> Purchase Orders --> Edit Input Fields** .

The properties marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Requisition #	The number of the requisition from which the item was loaded to the purchase order, or the requisition which the item can be sent back to, if necessary. Type the requisition number in the Requisition # field.

Option	Description
Item # *	<p>The number of the purchase item.</p> <p>The Item # is automatically populated with the next available item number, but you can modify the item number according to your needs.</p> <p>If necessary, type a new item number in the Item # field.</p>
Job #	<p>The number of the production control job the material item is reserved to.</p> <p>Type the job number in the Job # field.</p>
Quantity *	<p>The number of pieces to be added.</p> <p>Use the numeric keypad in the quantity field to add, multiply, divide, or subtract numbers to adjust the quantity.</p>
Shape *	<p>The material shape of each piece.</p> <p>Either click the arrow on the right side of the Shape field to select the shape, or type the shape indicator in the field (for example, HSS).</p>
Grade *	<p>The material grade of each piece.</p> <p>Either click the arrow on the right side of the Grade list to select the grade, or type the grade indicator in the field.</p>
Dimensions *	<p>The material dimension, or material size, of each piece.</p> <p>Click the Dimensions field to select an available material dimension, and double-click the desired dimension in the list.</p> <hr/> <p>TIP You can also use a custom material dimension. Note that the dimension is not automatically added to the material database.</p> <p>To use a custom dimension, do the following:</p> <ol style="list-style-type: none"> Click in the Dimensions field. Click Add Size. Define the dimension properties. Click Save. <p>You can now select the dimension and use it.</p> <hr/>

Option	Description
Length	<p>The length of each piece.</p> <p>Default length input settings are set in Company Standards, but you can modify them for each job.</p>
Base Price	<p>The base price of the material item. We recommend that you use base prices to create more detailed reports.</p> <p>Type the base price in the Base Price field.</p> <p>To change the base price units and convert the current price to the selected units, right-click the Base Price field, and select an appropriate option in the context menu.</p>
Reference Number	<p>The reference number that links the item to a production control job.</p> <p>The reference number can be different depending on the case:</p> <ul style="list-style-type: none"> • If an item is sent from Production Control to Purchasing or Inventory, Tekla EPM creates a copy of the record, and the item is linked to include the reference number. • If an item is sent to purchasing from an advance bill of materials, the reference number is either the eventual mark number of the item, or the page number along with the item number. • If the item is sent to purchasing later in the process, the reference number is the mark or piece mark number.
Date Required	<p>The date when the material item is due. Entering the required date can be useful when creating reports.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> • Type the date in the Date Required field. The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY. • Click the arrow on the right side of the Date Required field and select the date in the calendar.
Date Promised	<p>The date when the supplier has promised to deliver the material item. The Date Promised can be useful in reports.</p> <p>Do one of the following:</p>

Option	Description
	<ul style="list-style-type: none"> Type the date in the Date Promised field. The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY. Click the arrow on the right side of the Date Promised field and select the date in the calendar.
Mill Mark	<p>The mill mark that identifies the mill that produced the steel. The mill mark usually consists of 4 letters that are rolled into the material.</p> <p>Type the mill mark in the Mill Mark field.</p>
Cost Code	<p>The cost code assigned to the item.</p> <p>Click the arrow on the right side of the Cost Code list, and select a cost code in the list.</p> <p>For more information about cost codes, see Create, modify, or delete cost codes (page 25).</p>
Comment	<p>Any comments that you want to add about the material item.</p> <p>Type the comments in the Comment field.</p>
PRC Supplier	<p>The supplier warehouse whose pricing the item uses.</p> <p>To change the supplier, click the arrow on the right side of the PRC Supplier list and select the supplier in the list.</p> <p>The PRC Unit Cost, PRC Cost, and PRC Date fields are updated to show details about the pricing of the selected pricing supplier.</p>
Lot #	<p>The lot identification number of the material item.</p> <p>The Lot # field is automatically populated by the linked items in Production Control.</p>
Sequence	<p>The sequence number assigned to the item.</p> <p>The Sequence field is automatically populated by the linked items in Production Control.</p>
Category, Sub-Category	<p>A keyword used for sorting items in the PO # dialog box. Categories and sub-categories can be used for filtering information in the PO # dialog box.</p> <p>The Category and Sub-Category fields are automatically populated by the linked items in Production Control.</p>

3. Click **Add**.

The new material item is added at the end of the purchase order.

See also

[Copy a purchase order item \(page 84\)](#)

[Modify purchase order items \(page 85\)](#)

[Receive purchase order items \(page 89\)](#)

[Send purchase order items to a requisition \(page 97\)](#)

[Finalize purchase order items \(page 100\)](#)

[Delete purchase order items \(page 101\)](#)

3.7 Copy a purchase order item

You can copy a purchase order item and use it as the basis of a similar item. By copying items, you can save time and avoid entering the same information multiple times in a purchase order.

1. In the **PO #** dialog box, select the item that you want to copy.

2. At the bottom of the dialog box, click **Copy**.

A copy of the item appears at the bottom of the purchase order.

3. Adjust the properties of the new item according to your needs.

4. Click **Edit** to save the changes.

3.8 Copy material items to another purchase order

Use the **Copy Selected to Another Purchase Order** command to copy a group of material items from one purchase order to another. When material items are copied, the original items still remain in the current purchase order.

1. In the **PO #** dialog box, select the items that you want to copy.

To select multiple items, hold down **Ctrl**.

To select a range of subsequent items, hold down **Shift**.

2. Click the **Purchase Order** ribbon tab.

3. In the menu, select **Copy Selected to Another Purchase Order**.

4. In the **Select Purchase Order** dialog box, select the purchase order to which you want to copy the items.

You can also create a new purchase order and copy the items to the new purchase order. For more information, see [Create a purchase order \(page 68\)](#).

5. Click **OK**.

The material items are copied to the selected purchase order.

See also

[Copy a purchase order item \(page 84\)](#)

3.9 Modify purchase order items

You can either modify items in purchase orders one by one, or use the different **Global Edit** commands to modify multiple items at one go.

For more information, see the following links:

[Modify a single purchase order item \(page 85\)](#)

[Modify multiple purchase order items \(page 86\)](#)

[Modify the selected purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of multiple purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of the selected purchase order items \(page 89\)](#)

Modify a single purchase order item

You can modify the properties of purchase order items one by one in the **PO #** dialog box.

1. In the **PO #** dialog box, select the material item that you want to modify.
2. On the right side of the dialog box, modify the properties of the item according to your needs.

For example, you can change the base price of the item or assign a cost code to the item.

3. Click **Save** to update the item properties.

See also

[Modify multiple purchase order items \(page 86\)](#)

[Modify the selected purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of multiple purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of the selected purchase order items \(page 89\)](#)

Modify multiple purchase order items

Use the **Global Edit** command to modify the properties of all or multiple purchase order items at one go. This way, you can save time, as you do not need to change the properties of each item individually.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Global Edit --> Global Edit**.
3. To only modify specific types of items, in the **Purchase Order Global Edit Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the items that you want to modify to the **Included** list.
 - Type the maximum and minimum values for the items that you want to modify.
5. Click **OK**.

To further limit the item types that you want to modify, repeat steps 2 to 5 for all necessary filter types.
6. Modify any properties in the **Global Edit** dialog box according to your needs.

For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
7. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
8. Click **Update**.
9. To confirm changing the properties of multiple items, click **Yes** in the confirmation dialog box.

The changes you made to the item properties are updated to the **PO #** dialog box.

See also

[Modify a single purchase order item \(page 85\)](#)

[Modify the selected purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of multiple purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of the selected purchase order items \(page 89\)](#)

Modify the selected purchase order items

Use the **Global Edit Selected** command to modify the properties of the selected items in the purchase order. This way, you can save time, as you do not need to change the properties of each item individually.

1. In the **PO #** dialog box, select the items that you want to modify.

To select multiple items, hold down **Ctrl**.

To select a range of subsequent items, hold down **Shift**.

2. Click the **Purchase Order** ribbon tab.
3. In the menu, select **Global Edit** --> **Global Edit Selected**.
4. Modify any properties in the **Global Edit** dialog box according to your needs.

For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

5. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

6. Click **Update**.

The properties of the selected items are updated to the **PO #** dialog box.

See also

[Modify a single purchase order item \(page 85\)](#)

[Modify multiple purchase order items \(page 86\)](#)

[Modify the shape, grade, dimensions, or length of multiple purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of the selected purchase order items \(page 89\)](#)

Modify the shape, grade, dimensions, or length of multiple purchase order items

Use the **Global Edit By Shape** command to modify the shape, grade, dimensions, or length of all or multiple items in the dialog **PO #** box.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Global Edit --> Global Edit By Shape**.
3. In the **Shape** list at the top of the **Purchase Order Global Edit Filters** dialog box, select the shape.
4. To only modify specific types of items, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the items that you want to modify to the **Included** list.
 - Type the maximum and minimum values for the items that you want to modify.
6. Click **OK**.

To further limit the items that you want to modify, repeat steps 4 to 6 for all necessary filter types.

7. Click **OK**.
8. Modify any properties in the **Global Edit** dialog box according to your needs.

For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

9. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

10. Click **Update**.
11. To confirm changing the properties of multiple items, click **Yes** in the confirmation dialog box.

The selected item properties are updated to the **PO #** dialog box.

See also

[Modify a single purchase order item \(page 85\)](#)

[Modify multiple purchase order items \(page 86\)](#)

[Modify the selected purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of the selected purchase order items \(page 89\)](#)

Modify the shape, grade, dimensions, or length of the selected purchase order items

Use the **Global Edit Selected By Shape** command to modify the material shape, grade, dimensions, or length of the selected items in a purchase order.

1. In the **PO #** dialog box, select the items that you want to modify.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
2. Click the **Purchase Order** ribbon tab.
3. In the menu, select **Global Edit --> Global Edit Selected By Shape**.
4. Modify any properties in the **Global Edit** dialog box according to your needs.
For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
5. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
6. Click **Update**.

The properties of the selected items are updated to the **PO #** dialog box.
All other reference information of the items remains unchanged.

See also

[Modify a single purchase order item \(page 85\)](#)

[Modify multiple purchase order items \(page 86\)](#)

[Modify the selected purchase order items \(page 87\)](#)

[Modify the shape, grade, dimensions, or length of multiple purchase order items \(page 87\)](#)

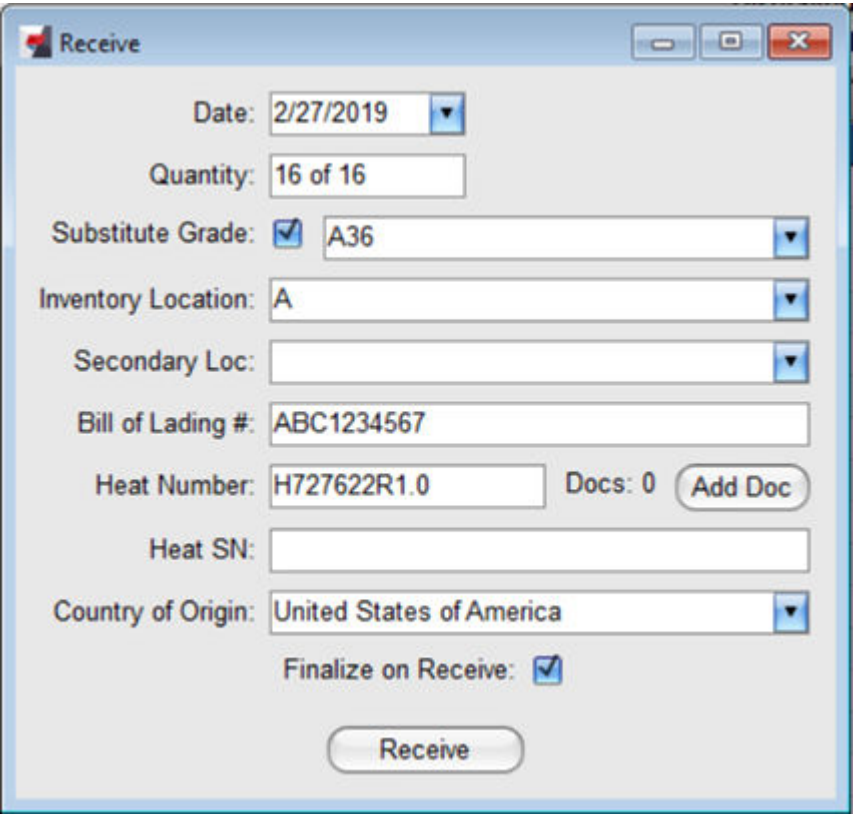
3.10 Receive purchase order items

You should mark all purchase order items that have been delivered as received in the **PO #** dialog box. You can receive material items with or without attaching heat documents or mill certifications to the items. Use the **Receive** command to select the items that you want to receive and attach heat

documents to the items, or the **Receive Displayed** command to receive all items currently displayed in the **PO #** dialog box without attaching heat documents.

Receive specific items and attach heat documents

1. In the upper-left corner of the **PO #** dialog box, ensure that you are in the receive mode.
If not, click the **Receive Mode** button to activate the receive mode.
2. Select the items that you want to receive.
3. At the bottom of the dialog box, click **Receive**.



4. In the **Receive** dialog box, define the properties of the received items.
Note that the available fields in the **Receive** dialog box are set on the **Receiving** tab of the **Purchase Order Company Standards** dialog box.

Option	Description
Date	The date when the items were received. Tekla EPM automatically uses the current date. To change the date, do one of the following:

Option	Description
	<ul style="list-style-type: none"> Type the date in the Date field. The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY. Click the arrow on the right side of the Date field and select a date in the calendar.
Quantity	<p>The quantity of the pieces that are received. If multiple items are received at once, the Quantity field is unavailable and all pieces of the items are received at once.</p> <p>Type the quantity of the pieces in the Quantity field.</p>
Substitute Grade	<p>When selected, you can select a substitute grade for the purchase order item. When cleared, Tekla EPM always uses the original grade of the item instead of a substitute grade.</p> <p>If necessary, select the Substitute Grade check box, and click the arrow on the right side of the related field to select the substitute grade.</p>
Inventory Location	<p>The inventory location of the material items.</p> <p>Click the arrow on the right side of the Location field and select a location in the list, or type a new location in the Location field.</p>
Secondary Loc	<p>The secondary inventory location of the material items.</p> <p>Click the arrow on the right side of the Secondary Loc field and select a location in the list, or type a new secondary location in the Secondary Loc field.</p> <p>For example, you can use secondary locations to represent different inventory sites.</p>
Bill of Lading #	<p>The bill of lading number or the shipment number that the material items were received on.</p> <p>Type the number in the B/L # field.</p>
Heat Number	<p>The heat number of the material items.</p> <p>Type the heat number in the Heat # field.</p> <p>Note that you need to type a heat number for a material item before attaching documents to it in Document Index.</p>

Option	Description
Heat SN	A property that ensures that heat numbers are not duplicated. However, duplications are extremely rare, so using the Heat SN field is optional. If necessary, type a value in the Heat SN field.
Country of Origin	The country of origin of the material items. Click the arrow on the right side of the Country field, and select a country in the list. The available countries can be modified in the Countries dialog box. For more information, see .
Finalize on Receive	When selected, the received material items are finalized when you receive them. This means that you cannot make further changes to the items. If material items are received but not finalized, the item quantity changes to zero to update the inventory records.

5. If necessary, you can attach heat documents to the items. Do the following:
 - a. On the right side of the **Heat Number** dialog box, click **Add Doc.**
 - b. Do any of the following:
 - In the **Document Index - Add Document Reference** dialog box, click **Add File**.
 - Drag and drop the heat document to the **Document Index - Add Document Reference** dialog box.

If you drag and drop the heat document to the **Document Index - Add Document Reference** dialog box, skip steps c and d.
 - c. In the **Open** dialog box, browse to find the document that you want to add, and select the document.
 - d. Click **Open**.

If you want to add more documents with the same settings, click **Add Additional File** and repeat steps 4 to 6 for each document.
 - e. In the **Add File** dialog box, select the company and contact that provided you with the document in the **File Source** lists.
 - f. According to your needs, do one of the following:
 - To compress multiple documents into one archive, select the **Compress Files into a Single Archive** option.
 - To leave the documents you added uncompressed, select the **Leave Files Uncompressed** option.
 - g. According to your needs, do one of the following:

- To move the original document to the selected folder, select the **Move File** option.
 - To copy the document to the selected folder but leave the original untouched, select the **Copy File (Leave Original)** option.
- h. Type a description for the documents you added.
 - i. Click **Add File**.
 - j. Type a description for the entire document reference.
This description applies to all documents, emails, and email attachments that you add.
 - k. Click **Add Document Reference**.
 - l. To close the **Document Index - Add Document Reference** dialog box, click the **Close** button (X) in the upper-right corner.
6. In the **Receive** dialog box, click **Receive**.
- The selected items are marked as received and have the selected heat documents attached to them.

Receive all displayed items without attaching heat documents

Note that any applied filters affect which items are displayed in the **PO #** dialog box. For more information, see [Filter information in the PO # dialog box \(page 79\)](#).

1. In the upper-left corner of the **PO #** dialog box, ensure that you are in the receive mode.
If not, click the **Receive Mode** button to activate the receive mode.
2. At the bottom of the dialog box, click **Receive Displayed**.
3. In the **Receive** dialog box, define the properties of the received items.
Note that the available fields in the **Receive** dialog box are set on the **Receiving** tab of the **Purchase Order Company Standards** dialog box.

Option	Description
Date	<p>The date when the items were received.</p> <p>Tekla EPM automatically uses the current date.</p> <p>To change the date, do one of the following:</p> <ul style="list-style-type: none"> • Type the date in the Date field. <p>The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.</p>

Option	Description
	<ul style="list-style-type: none"> Click the arrow on the right side of the Date field and select a date in the calendar.
Quantity	<p>The quantity of the pieces that are received. If multiple items are received at once, the Quantity field is unavailable and all pieces of the items are received at once.</p> <p>Type the quantity of the pieces in the Quantity field.</p>
Substitute Grade	<p>When selected, you can select a substitute grade for the purchase order item. When cleared, Tekla EPM always uses the original grade of the item instead of a substitute grade.</p> <p>If necessary, select the Substitute Grade check box, and click the arrow on the right side of the related field to select the substitute grade.</p>
Inventory Location	<p>The inventory location of the material items.</p> <p>Click the arrow on the right side of the Location field and select a location in the list, or type a new location in the Location field.</p>
Secondary Loc	<p>The secondary inventory location of the material items.</p> <p>Click the arrow on the right side of the Secondary Loc field and select a location in the list, or type a new secondary location in the Secondary Loc field.</p> <p>For example, you can use secondary locations to represent different inventory sites.</p>
Bill of Lading #	<p>The bill of lading number or the shipment number that the material items were received on.</p> <p>Type the number in the B/L # field.</p>
Heat Number	<p>The heat number of the material items.</p> <p>Type the heat number in the Heat # field.</p> <p>Note that you need to type a heat number for a material item before attaching documents to it in Document Index.</p>
Heat SN	<p>A property that ensures that heat numbers are not duplicated. However, duplications are extremely rare, so using the Heat SN field is optional.</p> <p>If necessary, type a value in the Heat SN field.</p>

Option	Description
Country of Origin	The country of origin of the material items. Click the arrow on the right side of the Country field, and select a country in the list. The available countries can be modified in the Countries dialog box. For more information, see .
Finalize on Receive	When selected, the received material items are finalized when you receive them. This means that you cannot make further changes to the items.

4. Click **Receive**.

All items that are currently displayed in the **PO #** dialog box are marked as received.

Unreceive purchase order items

Use the **Un-Receive** command to cancel receiving any items that you have accidentally marked as received.

Note that only items that have been marked as received can be unreceived.

1. In the upper-left corner of the **PO #** dialog box, ensure that you are in the receive mode.
If not, click the **Receive Mode** button to activate the receive mode.
2. Select the purchase order item that you want to unreceive.
3. Click the **Purchase Order** ribbon tab.
4. In the menu, select **Un-Receive**.
5. In the **Un-Receive** dialog box, type the quantity of items that you want to unreceive.
6. Click **Un-Receive**.

See also

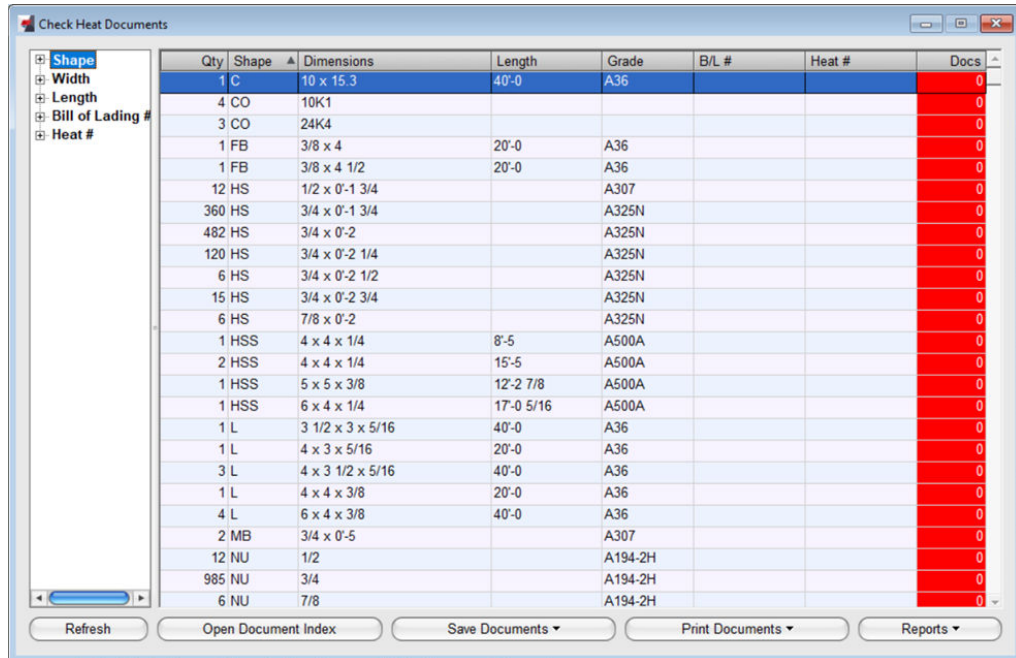
[Receive purchase order items \(page 89\)](#)

3.11 View heat documents attached to purchase order items

Use the **Check Heat Documents** command to view the heat documents attached to the purchase order items. You can also save or print the available heat documents, or create reports on the items that have or do not have heat documents attached to them.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Check Heat Documents**.

The **Check Heat Documents** dialog box opens.



Note that if the purchase order items do not have heat documents attached to them, the **Docs** column is highlighted with red.

3. In the **Check Heat Documents** dialog box, do any of the following:

To	Do this
Update heat document information	<ul style="list-style-type: none"> Click Refresh. Any new or modified information is updated.
Add, modify, and delete heat documents in Document Index	<ol style="list-style-type: none"> Click Open Document Index. Document Index opens. For more information, see .
Save heat documents	<ol style="list-style-type: none"> Do one of the following: <ul style="list-style-type: none"> To only save particular heat documents, click the item whose documents you want to save, and click Save Documents --> Save Documents - Selected . To save all available heat documents, click Save Documents --> Save Documents - All . In the Browse For Folder dialog box, browse to an empty folder where you want to save the heat document information.

To	Do this
	<p>c. Click OK.</p> <p>A report of the heat documents opens.</p>
Print heat documents	<p>a. Do one of the following:</p> <ul style="list-style-type: none"> To only print particular heat documents, click the items whose documents you want to print, and click Print Documents --> Print Documents - Selected. To print all available heat documents, click Print Documents --> Print Documents - All. <p>b. In the Select Printer dialog box, click a printer to select it.</p> <p>c. Click OK.</p> <p>All or the selected heat documents are printed.</p>
Create reports	<p>a. Do one of the following:</p> <ul style="list-style-type: none"> To create a report only containing particular items, click the items to select them, and click Reports --> Reports - Selected. To create a report containing all items, click Reports --> Reports - All. <p>b. In the Report Selection dialog box, click the report that you want to create.</p> <p>c. Do one of the following:</p> <ul style="list-style-type: none"> To view the report, click View. To print the report, change the number of copies by clicking the + and - buttons, and click Print. To export the report, click Export, modify the export format, file name, and location, and click Export again.

4. To close the dialog box, click the **Close** button (X) in the upper-right corner.

See also

[Store document references for a purchase order \(page 78\)](#)

3.12 Send purchase order items to a requisition

Use the **Send to REQ** command to send purchase order items back to requisitions. Note that only items that have not yet been received can be sent back to a requisition. The items need to have the correct requisition numbers defined in their **Requisition #** fields, so that Tekla EPM knows which requisition it should be returned to.

1. In the **PO #** dialog box, select the material items that you want to send back to a requisition.

To select multiple items, hold down **Ctrl**.

To select a range of subsequent items, hold down **Shift**.

2. At the bottom of the dialog box, click **Send to REQ**.
3. To confirm returning the items to the requisition, click **Yes** in the confirmation dialog box.

The selected items are returned to the requisition. These items are no longer displayed in the **PO #** dialog box.

See also

[Load requisition items into a purchase order \(page 54\)](#)

3.13 View the pricing history of a material item

Use the **Purchase History** command to view the pricing history of a material item. You can filter the purchase history by various options, such as the vendor, the requisition number, or the length.

1. In the **PO #** dialog box, select the item whose pricing history you want to view.
2. Click the **Purchase Order** ribbon tab.
3. In the menu, select **Purchase History**.

The **Purchase Order History** dialog box opens.

Vendor	PO #	P...	Qty	Sh...	Dimensions	Length	Gr...	Base P...	Price	Wei...	Weight
Tekla - Supplier	000000(2/14/20		4	PL	1/8 x 6	0'-8	A36	25.00/CWT	\$1.70	2#	7#
Tekla - Supplier	000000(2/14/20		8	PL	1/4 x 5 1/2	2'-5 3/4	A36	25.00/CWT	\$23.20	12#	93#
Tekla - Supplier	000000(2/14/20		2	PL	1/4 x 6	1'-1 1/4	A36	25.00/CWT	\$2.82	6#	11#
Tekla - Supplier	000000(2/14/20		4	PL	1/4 x 6	1'-1 1/4	A36	25.00/CWT	\$5.64	6#	23#
Tekla - Supplier	000000(2/14/20		12	PL	3/8 x 2 1/2	0'-2 1/2	A36	25.00/CWT	\$1.99	1#	8#
Tekla - Supplier	000000(2/14/20		9	PL	3/8 x 5	0'-8 1/2	A36	25.00/CWT	\$10.17	5#	41#
Tekla - Supplier	000000(2/14/20		2	PL	3/8 x 5	0'-9	A36	25.00/CWT	\$2.39	5#	10#
Tekla - Supplier	000000(2/14/20		2	PL	3/8 x 5 1/2	0'-8 1/2	A36	25.00/CWT	\$2.49	5#	10#
Tekla - Supplier	000000(2/14/20		2	PL	3/8 x 5 1/2	0'-10	A36	25.00/CWT	\$2.92	6#	12#
Tekla - Supplier	000000(2/14/20		6	PL	3/8 x 6	0'-6	A36	25.00/CWT	\$5.74	4#	23#
Tekla - Supplier	000000(2/14/20		6	PL	3/8 x 6	0'-8 1/2	A36	25.00/CWT	\$8.14	5#	33#
Tekla - Supplier	000000(2/14/20		1	PL	3/8 x 7 7/8	0'-11 5/8	A36	25.00/CWT	\$2.43	10#	10#
Tekla - Supplier	000000(2/14/20		1	PL	3/8 x 7 7/8	1'-1 1/4	A36	25.00/CWT	\$2.77	11#	11#
Tekla - Supplier	000000(2/14/20		4	PL	3/8 x 8	1'-0 1/2	A36	25.00/CWT	\$10.63	11#	43#
Tekla - Supplier	000000(2/14/20		1	PL	3/8 x 9 1/8	1'-4 1/2	A36	25.00/CWT	\$4.00	16#	16#

The top section of the dialog box allows you to filter the pricing history information, whereas the bottom section shows the pricing history of the material item.

4. If necessary, filter the pricing history by clicking arrows on the right side of the different filter lists and selecting filtering options in the lists.
5. To update the pricing history to match the filters you set, click **Load History**.
6. If you want to save the pricing history as a Microsoft Excel worksheet, do the following:
 - a. Right-click anywhere in the display area of the **Purchase Order History** dialog box.
 - b. In the context menu, select **Export to Excel**.
 - c. In the **Save As** dialog box, browse to the folder where you want to save the file.
 - d. If necessary, modify the file name.
 - e. Click **Save**.

If necessary, you can customize the layout of the **Purchase Order History** dialog box to include only the when exporting the pricing history. For more information, see .

7. To close the **Purchase Order History** dialog box, click the **Close** button (X) in the upper-right corner.

See also

[View all changes in a purchase order \(page 102\)](#)

3.14 Finalize purchase order items

Use the **Finalize Selected Items** and **Finalize Displayed Items** commands to finalize purchase order items, so that no further changes can be made to the items. The **Finalize Selected Items** command finalizes the material items that are currently selected in the **PO #** dialog box. The **Finalize Displayed Items** finalizes the material items that are currently filtered to be shown in the **PO #** dialog box.

If material items are received but not finalized, the item quantity changes to zero to update the inventory records. When the purchase order items are finalized, the link between the purchase order and the inventory is irreversibly broken. Even if the items are later unfinalized, they are no longer linked to the inventory.

Finalize the selected purchase order items

1. In the **PO #** dialog box, select the items that you want to finalize.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
2. Click the **Purchase Order** ribbon tab.
3. In the menu, select **Finalize Selected Items**.
4. To confirm finalizing the items, click **Yes** in the confirmation dialog box.

The selected items are finalized.

Note that the letter **F** appears in the leftmost column of the **PO #** dialog box to indicate that the items are finalized.

If you need to make changes to finalized material items, you can unfinalize the items. For more information [Unfinalize purchase order items \(page 101\)](#).

Finalize all displayed purchase order items

To change which items are displayed in the **PO #** dialog box, see [Filter information in the PO # dialog box \(page 79\)](#).

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Finalize Displayed Items**.
3. To confirm finalizing the items, click **Yes** in the confirmation dialog box.

The displayed items are finalized.

Note that the letter **F** appears in the leftmost column of the **PO #** dialog box to indicate that the items are finalized.

If you need to make changes to finalized material items, you can unfinalize the items. For more information [Unfinalize purchase order items \(page 101\)](#).

Unfinalize purchase order items

Use the **Un-Finalize** command to cancel finalizing purchase order items, so that you can make any necessary changes to the items.

Note that when purchase order items are finalized, the link between the purchase order and the inventory is irreversibly broken. Even if you unfinalize the items, they are no longer linked to the inventory.

1. In the upper-left corner of the **PO #** dialog box, ensure that you are in the receive mode.
If not, click the **Receive Mode** button to activate the receive mode.
2. Select the items that you want to unfinalize.
3. In the **File** menu, select **Un-Finalize**.
4. To confirm unfinalizing the items, click **Yes** in the confirmation dialog box.

The selected items are unfinalized.

Note that the letter **F** has disappeared from the leftmost column of each item in the **PO #** dialog box.

You can now make changes to the items according to your needs.

See also

[Finalize purchase order items \(page 100\)](#)

3.15 Delete purchase order items

You can delete unnecessary purchase order items at any point. Note that deleting items from a purchase is permanent and cannot be undone.

You can still see the deleted items in the list of changes and in the transaction history. For more information, see [View all changes in a purchase order \(page 102\)](#) and [View the transaction history of a purchase order \(page 103\)](#).

1. In the **PO #** dialog box, select the items that you want to delete.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
2. At the bottom of the dialog box, click **Delete**.

3. To permanently delete the items, click **Yes** in the confirmation dialog box. The items are deleted from the purchase order.

3.16 View all changes in a purchase order

Tekla EPM records every change made in the system. This is useful because you can view all changes made in the current purchase order at once. You can filter the information to see changes made by a particular user, or on a particular date. You can also print the list of changes.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **List Of Changes**.
3. In the **Report Filter** dialog box, do any of the following according to your needs:

To	Do this
Filter changes by user	<ol style="list-style-type: none"> a. Click Edit on the right side of the User section. b. Click the arrow buttons to move the users whose changes you want to view to the Included list. c. Click OK.
Filter changes by date	<ol style="list-style-type: none"> a. Click Edit on the right side of the Date section. b. Enter the start (Min) and end (Max) dates. c. Click OK.

4. Click **Make Report**.
5. In the **Report Progress** dialog box, do one of the following according to your needs:

To	Do this
View the list of changes	<ul style="list-style-type: none"> • Click View. <p>The report opens in Tekla EPM Report Viewer. You can use the Email Excel and Email PDF buttons at the top of the Tekla EPM Report Viewer window to email the report via Microsoft Outlook.</p>
Print the list of changes	<ol style="list-style-type: none"> a. Change the number of the printed copies by clicking the + and - buttons.

To	Do this
	b. Click Print . c. In the Select Printer dialog box, click a printer to select it. d. Click OK .

- To close the dialog box, click the **Close** button (X) in the upper-right corner.

See also

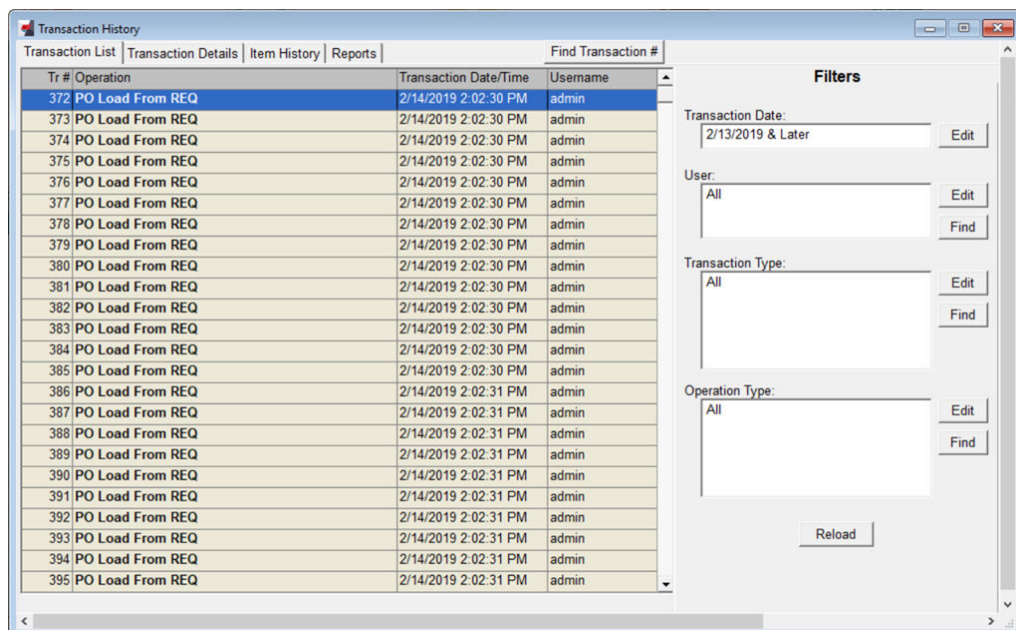
[View the pricing history of a material item \(page 98\)](#)

3.17 View the transaction history of a purchase order

Use the **Transaction History** dialog box to view all transactions in a purchase order. You can also view further transaction details and item history, and view or print different transaction history reports.

- In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
- In the menu, select **Transaction History**.

The **Transaction History** dialog box opens on the **Transaction List** tab.



- To filter the displayed transactions, use the fields in the **Filters** section of the dialog box:

- a. Click **Edit** next to a filtering option.
The available filtering criteria are the transaction date, the name of the user that made the transaction, the transaction type, and the operation type.
 - b. Do one of the following:
 - For transaction date, enter the start and end dates to define a range within which the transactions have taken place.
 - For user, transaction type, and operation type, use the arrow buttons to move the desired items to the **Included** list.
 - c. Click **OK**.
To view all transactions again, click **Reload**.
4. To view more information about a transaction, do the following:
 - a. Click to select the transaction on the **Transaction List** tab.
 - b. Click the **Transaction Details** tab to view the details of the selected transaction.
 - c. Click the **Item History** tab to view the item history of the selected transaction.

Find a transaction by transaction number

1. On the **Transaction List** tab, click **Find Transaction #**.
2. Enter the transaction number in the field.
3. Click **OK**.

The transaction with the selected transaction number is selected on the **Transaction List** tab.

Create transaction history reports

1. Open the **Reports** tab.
2. To only include specific items in the transaction history report, click **Edit** next to a filtering option.
3. Do one of the following:
 - For dates, enter the start and end dates to define a range within which the transactions have taken place.
 - For other filter criteria, use the arrow buttons to move the desired items to the **Included** list.
4. Click **OK**.

5. Click **Make Report**.
6. In the **Report Progress** dialog box, select the report that you want to view or print.
7. Do any of the following:

To	Do this
View the report	<ul style="list-style-type: none"> • Click View.
Print the report	<ol style="list-style-type: none"> a. Change the number of the printed copies by clicking the + and - buttons. b. In the Select Printer dialog box, click a printer to select it. c. Click Print.

3.18 View, print, or export purchase order reports

Use the **Reports** command to create reports based on the current purchase order. For example, you can create a material receiving checklist, or a full purchase order report. You can then view or print the created reports, or export the reports to save them in another file format.

To create purchase order reports, do the following:

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Reports**.
3. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

To customize the reports that are displayed in the **Report Selection** dialog box, click the **Edit Report Types**.

4. If you want to include the company logo and vendor code in the report, select the **Show Company Logo** and **Show Vendor Code** check boxes.

When the check boxes are cleared, the information is not included in the report.

According to your needs, see any of the following instructions:

View the report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the selected report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the report

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Modify the file name according to your needs.
5. Browse to the location where you want to save the exported file, and click **Save**.
6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

3.19 View, print, or export job-specific receiving reports

Use the **Receiving Reports** command to create receiving reports that contain information from the current purchase order. You can then view or print the reports, or export the reports and save them in another file format. For example, you can create a purchase order summary, a barcode checklist, or a receiving list.

To create receiving reports, do the following:

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Receiving Reports**.

3. To only include particular purchase orders in the reports, in the **Purchase Order Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
 - Click the arrow buttons to move the purchase order properties that you want to include in the report to the **Included** list.
 - Type the maximum and minimum values for the purchase orders that you want to include in the report.
5. Click **OK**.

To further limit which properties the purchase orders in the reports should match, repeat steps 3 to 5 for all necessary filter types.
6. Click **Make Report**.
7. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

To customize the reports that are displayed in the **Report Selection** dialog box, see .
8. If you want to include the company logo and vendor code in the report, select the **Show Company Logo** and **Show Vendor Code** check boxes.

When the check boxes are cleared, the information is not included in the report.

According to your needs, see any of the following instructions:

View the report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the selected report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the report

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Modify the file name according to your needs.
5. Browse to the location where you want to save the exported file, and click **Save**.
6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

3.20 Approve a purchase order

Approving a purchase order allows you to lock the purchase order, so that no further changes can be made. If necessary, the order can still be unlocked to allow making changes again.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the menu, select **Approve Purchase Order**.
3. To confirm approving and locking the purchase order, click **Yes** in the confirmation dialog box.

The text at the top of the **PO #** dialog box now shows that the purchase order has been approved and locked, and the name of the user who approved and locked the purchase order.

Note that purchase orders are also locked if you export them.

See also

[Unlock a purchase order \(page 108\)](#)

[Finalize purchase order items \(page 100\)](#)

[Unfinalize purchase order items \(page 101\)](#)

Unlock a purchase order

Use the **Revoke Purchase Order Approval** command to unlock the purchase order to allow making changes to the purchase order.

1. In the **PO #** dialog box, click the **Purchase Order** ribbon tab.
2. In the **File** menu, select **Revoke Purchase Order Approval**.
3. To confirm revoking the purchase order approval, click **Yes** in the first confirmation dialog box.
4. To unlock the purchase order, click **Yes** in the second confirmation dialog box.

The purchase order is now unlocked. Users with access to the purchase order can make any necessary changes to the purchase order.

See also

[Approve a purchase order \(page 108\)](#)

[Finalize purchase order items \(page 100\)](#)

[Unfinalize purchase order items \(page 101\)](#)

3.21 Delete purchase orders

You can delete old and unnecessary purchase orders at any time. What happens to the material items within the purchase order depends on their receiving status.

Before deleting a purchase order, note that:

- Any material items in the purchase order that have not been received are deleted when the purchase order is deleted.
- Any received material items in the purchase order remain in the inventory, but are no longer linked to the deleted purchase order. These items behave like finalized items. For more information, see [Finalize purchase order items \(page 100\)](#).

You can still see the deleted items , even though the purchase order is deleted.

1. At the top of the Tekla EPM window, click the **Purchasing** button.
2. In the **Select Requisition/Purchase Order** dialog box, ensure that you are on the **Purchase Orders** tab.
3. Select the purchase orders that you want to delete.
To select multiple items, hold down **Ctrl**.
To select a range of subsequent items, hold down **Shift**.
4. Click **Delete**.
5. To permanently delete the purchase orders, click **Yes** in the confirmation dialog box.

The selected purchase orders are deleted.

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