University Health™
Shreveport

PeopleSoft Training

Material Stock Requests 9.1
BRFHS and BRFHM

Version Date: January 2014

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Table of Contents

Material_Stock_Requests_9_1_BRFHS_and_BRFHM 1

Material Stock Requests 1

Enter a Stock Request 1

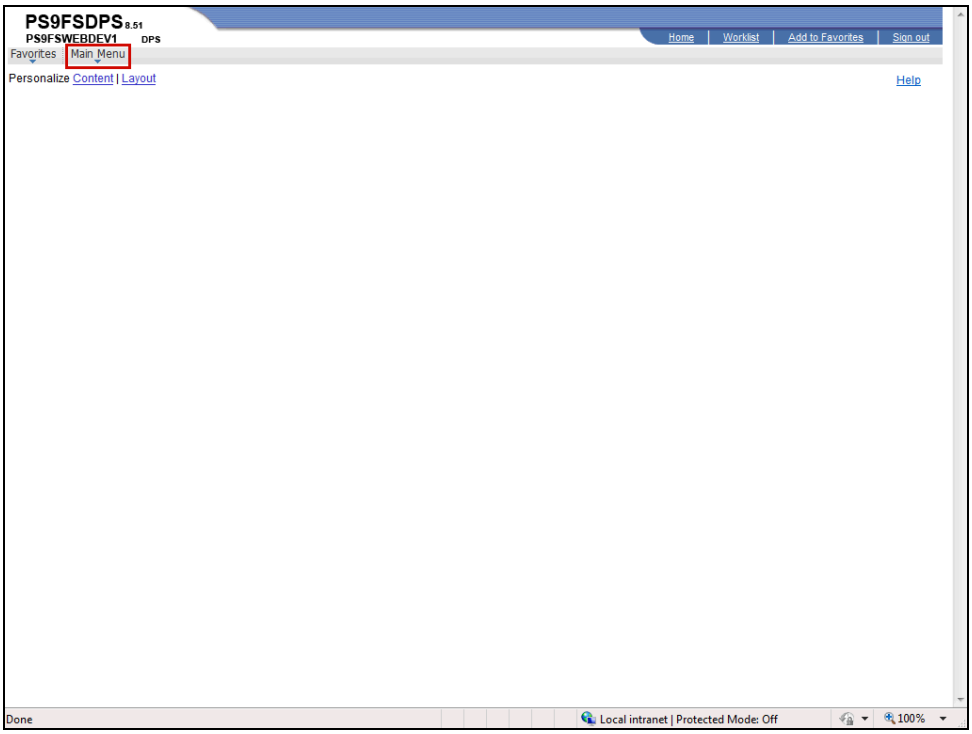
Material_Stock_Requests_9_1_BRFHS_and_BRFHM

Material Stock Requests

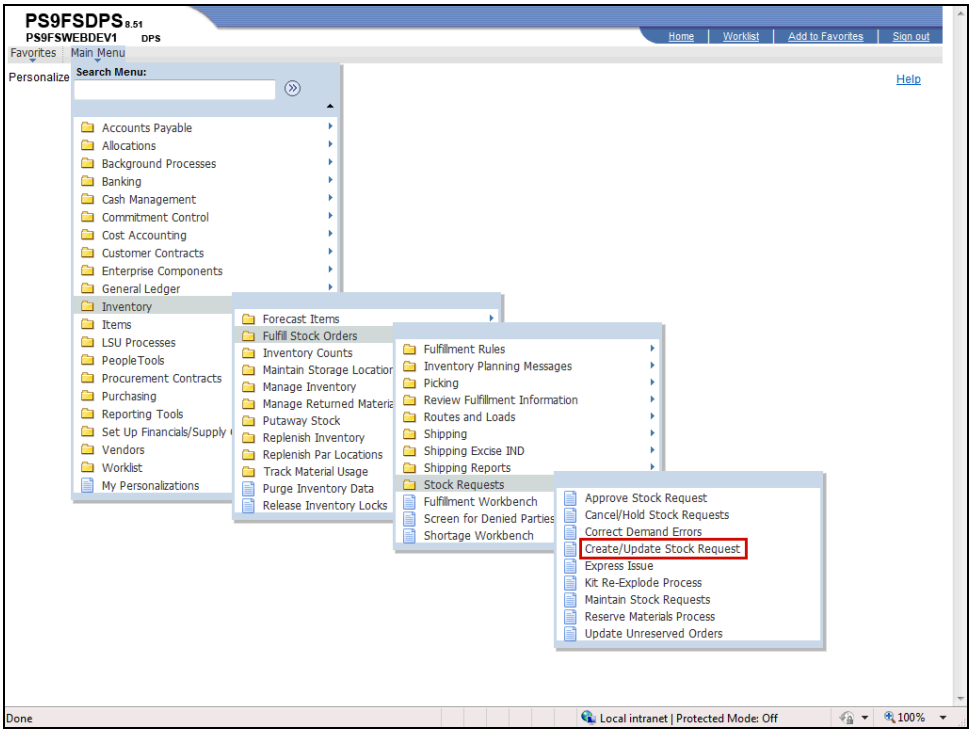
Enter a Stock Request

Procedure

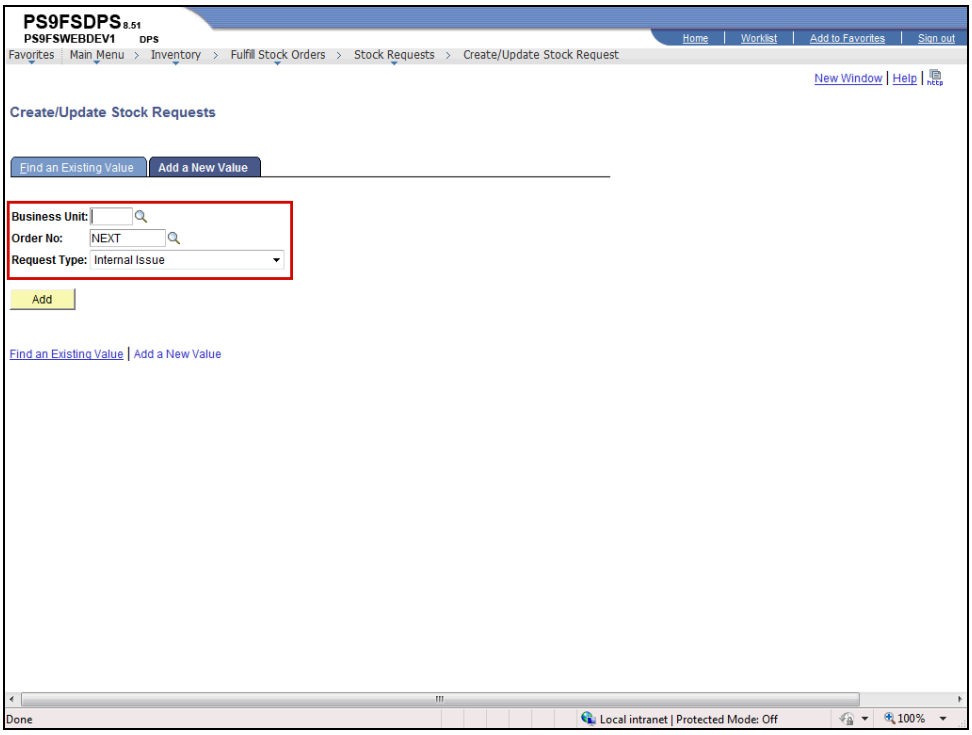
In this topic you learn how to **Enter a Stock Request**.



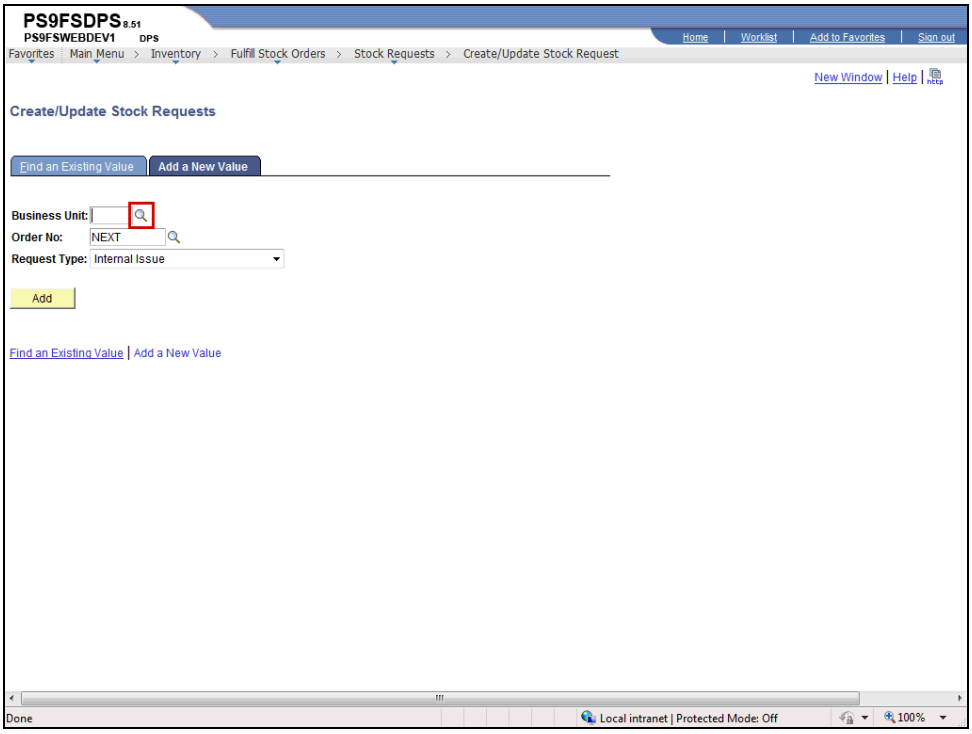
Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Inventory** menu. Inventory
3.	Click the **Fulfill Stock Orders** menu. Fulfill Stock Orders
4.	Click the **Stock Requests** menu. Stock Requests



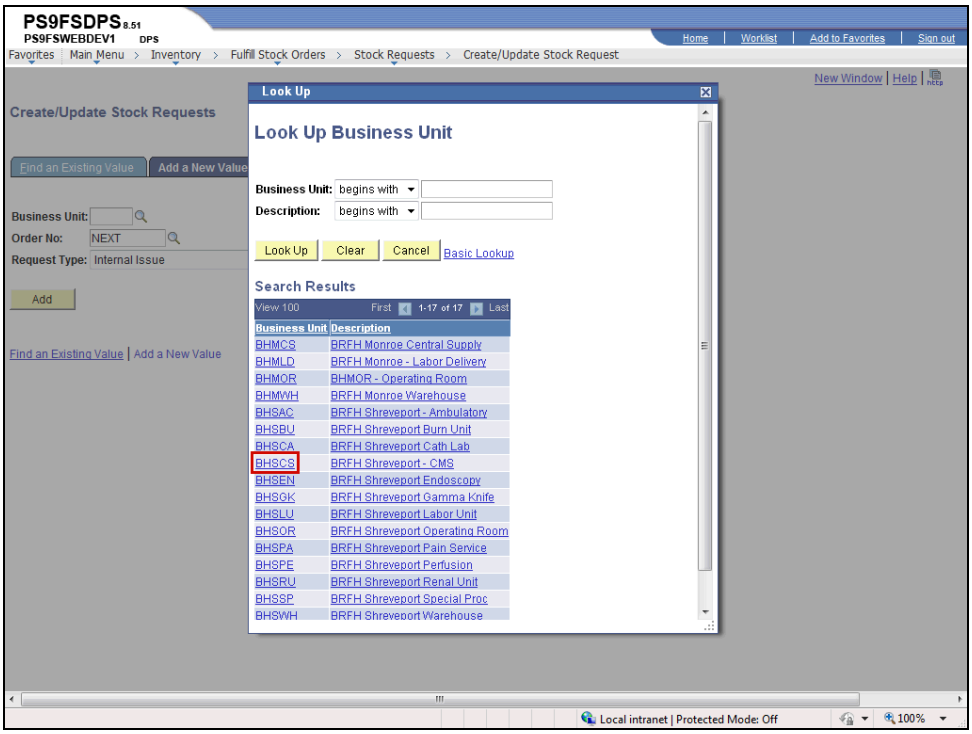
Step	Action
5.	Click the **Create/Update Stock Request** menu. Create/Update Stock Request



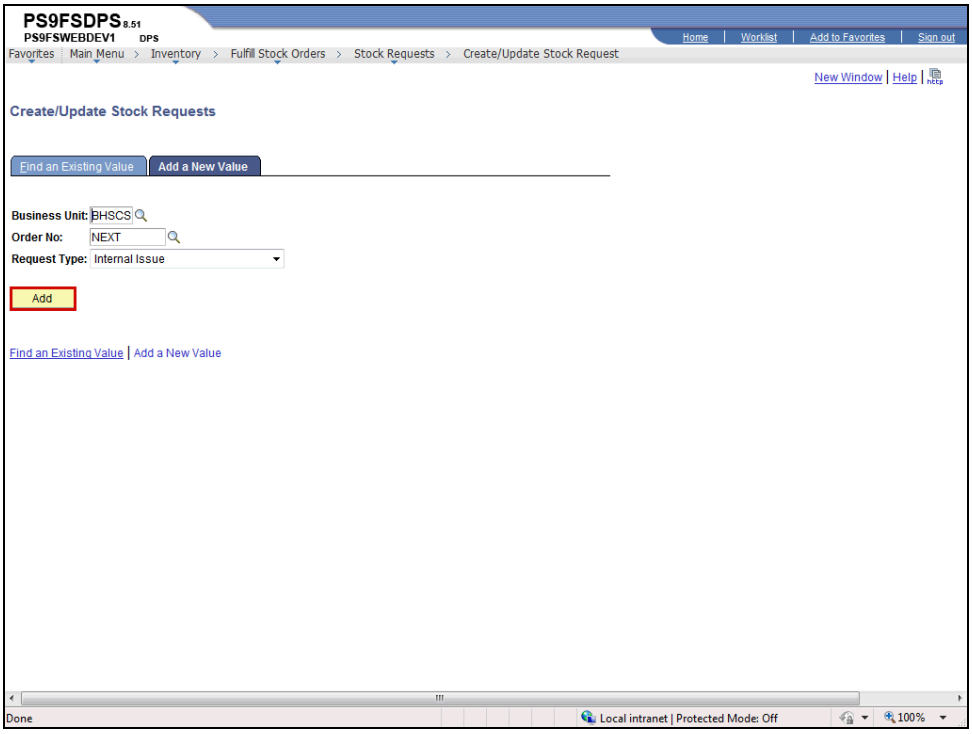
Step	Action
6.	***NOTE: Only BHSCS or BHSAC designations can be used for Business Unit when creating a Stock Request.*** The Order No. field defaults as NEXT and must remain as defaulted. Changing this field to anything other than NEXT will cause errors. Request Type field defaults as Internal Issue and will remain as defaulted.
7.	***NOTE: BHSAC will be phased out sometime in the next few months. BHSCS will be the Business Unit you will use for Stock Requests once this is completed.*** ***<u>Until notified of the change, users who use BHSAC as their Business Unit when entering a Stock Request should continue to do so.</u>***



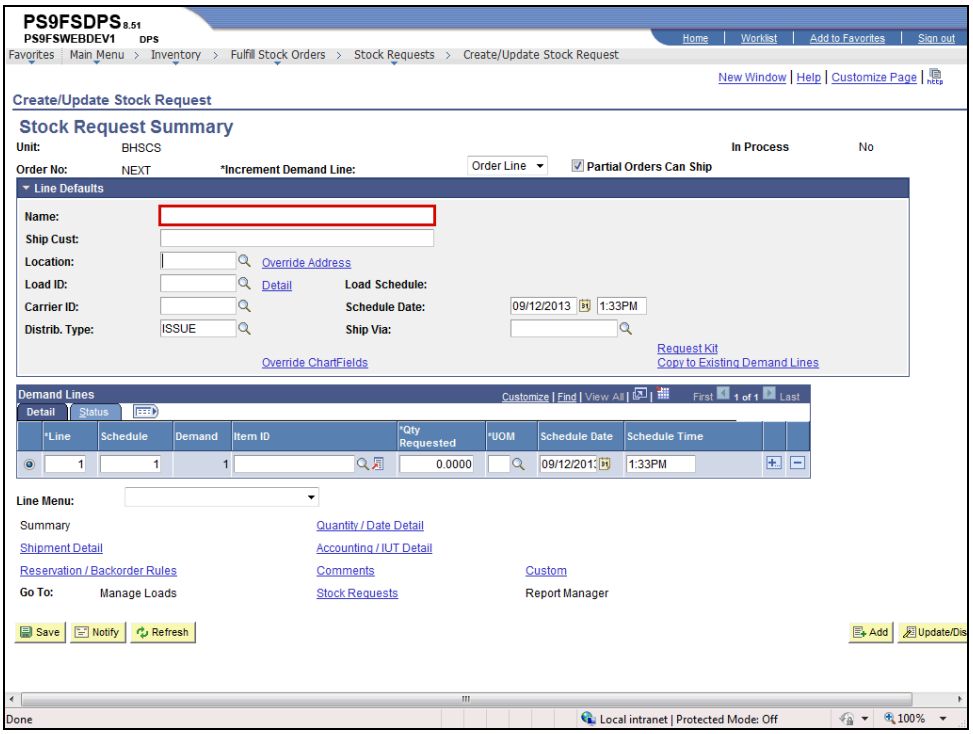
Step	Action
8.	Click the **Look up Business Unit** button.



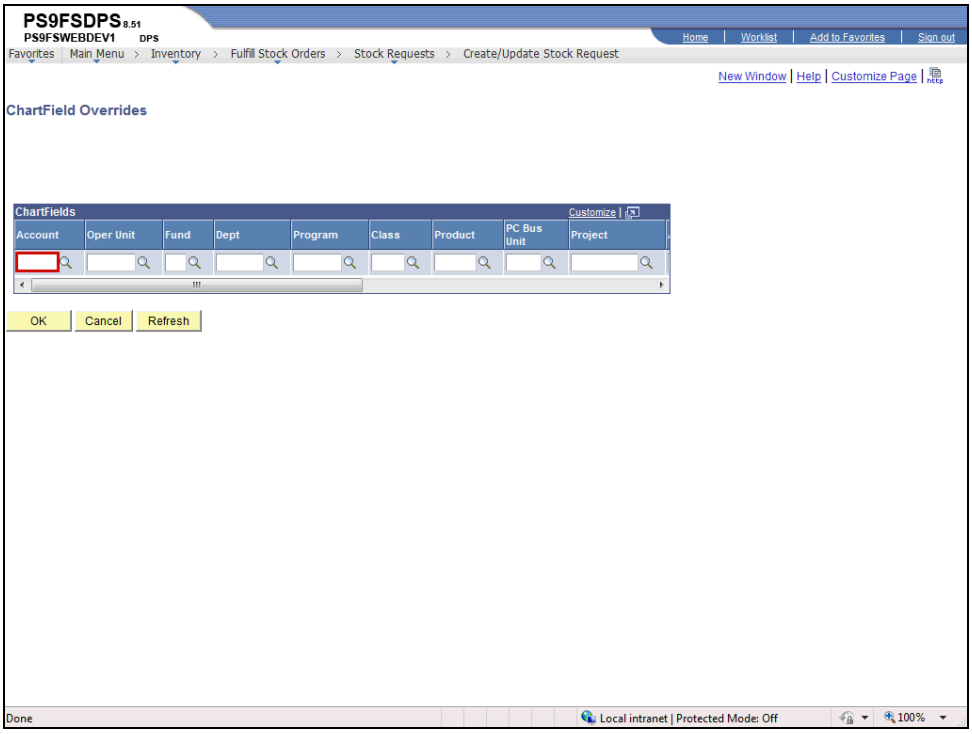
Step	Action
9.	Click the **BHSCS** link. BHSCS



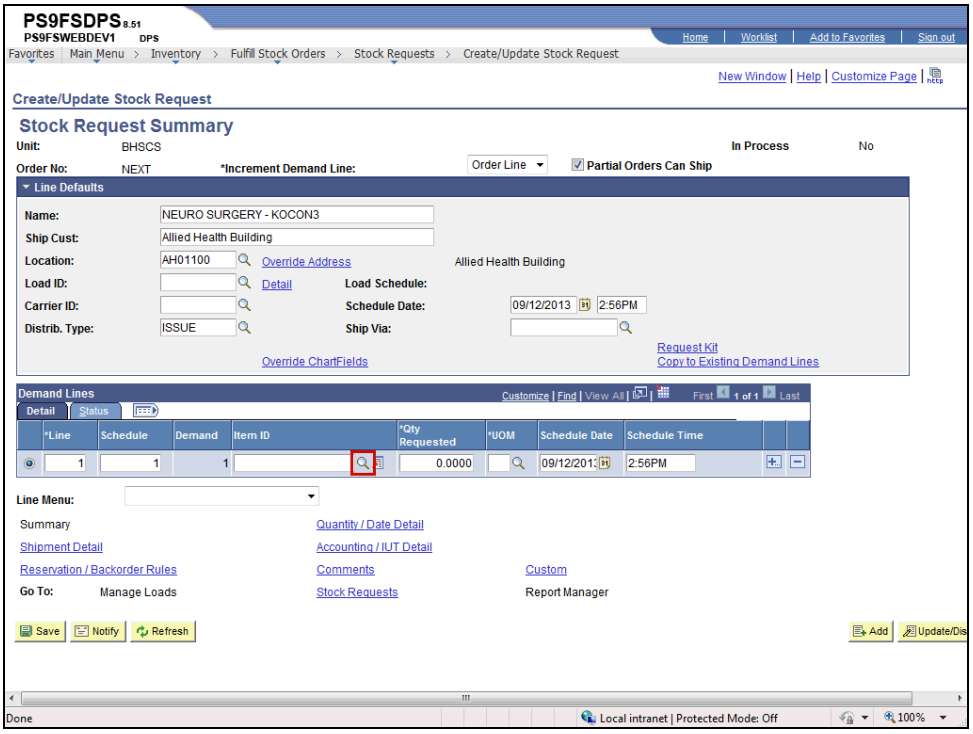
Step	Action
10.	Click the **Add** button. Add



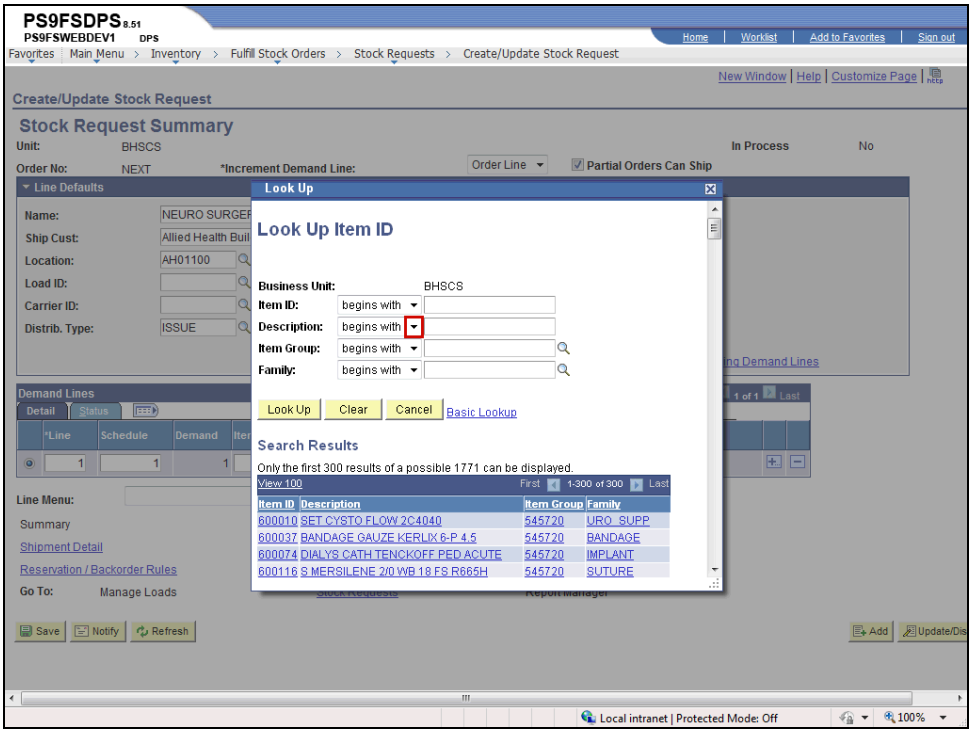
Step	Action
11.	You will enter your ***Department Name*** and your ***User ID*** into the Name field. You must enter the Department and UserID in **ALL CAPS**. Enter the desired information into the **Name** field. Enter "**NEURO SURGERY - KOCON3**".
12.	Enter the desired information into the **Location** field. Enter "**AH01100**". ***NOTE: Please use the exact campus location number as shown on your door jam.***
13.	*NOTE: The Ship Cust automatically defaults after entering the Override Chartfields information.* Click the **Override ChartFields** link. Override ChartFields
14.	***NOTE: The chartfield screen may look slightly different based on your user access.***



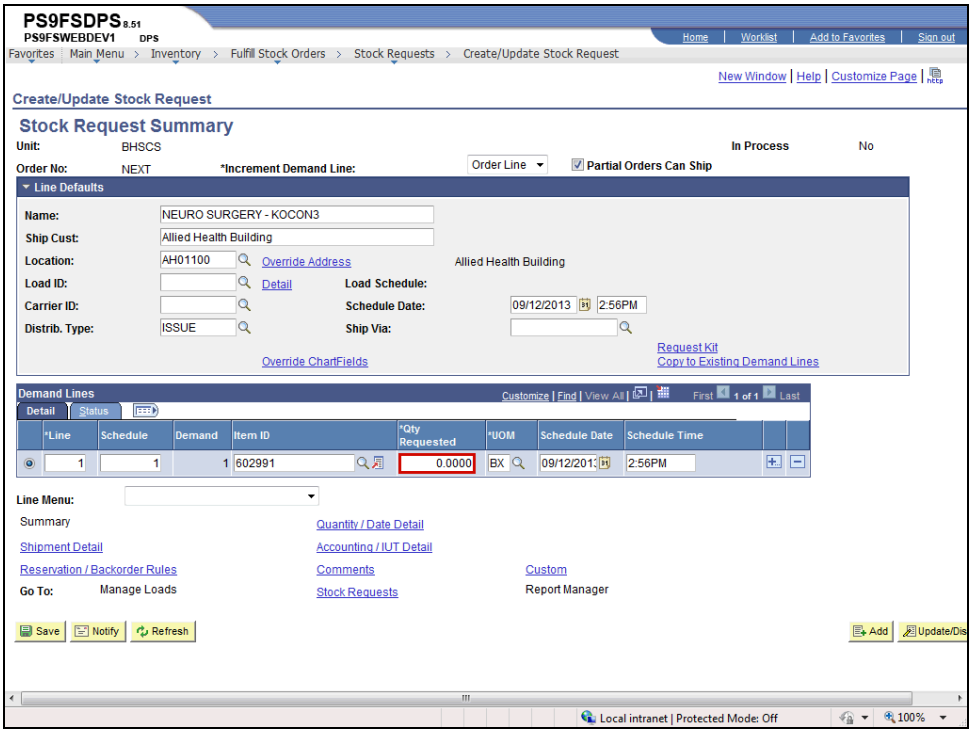
Step	Action
15.	Enter the desired information into the **Account** field. Enter "**545700**". *If you do not know the Account number you can search for it by clicking the Look up Account button located to the right of the Account field.*
16.	Enter the desired information into the **Dept** field. Enter "**2036380**". *If you do not know the Dept number you can search for it by clicking the Look up Account button located to the right of the Dept field.*
17.	Click the **OK** button. OK
18.	The Ship Cust information has defaulted into the field.
19.	***WARNING: THE NAME, LOCATION AND OVERRIDE CHARTFIELDS INFORMATION MUST BE ENTERED PRIOR TO ENTERING YOUR FIRST ITEM. IF THIS INFORMATION IS NOT ENTERED BEFORE ITEM INFORMATION, YOU WILL BE UNABLE TO SAVE THE ORDER.***



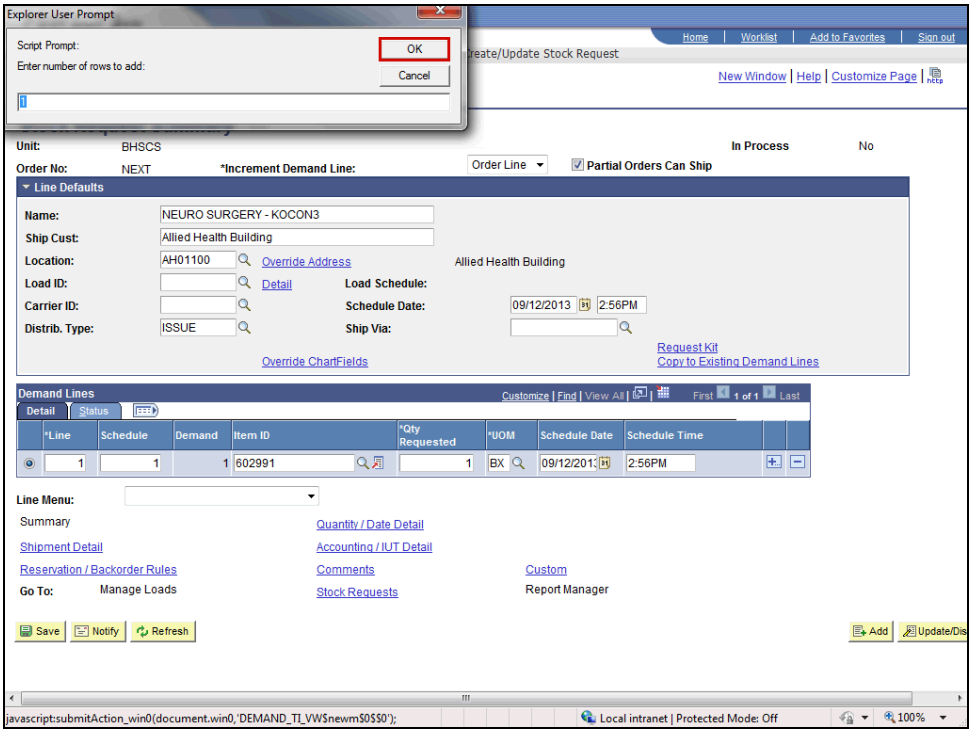
Step	Action
20.	Click the **Look up Item ID** button. *If you know the Item ID, you can type directly into the Item ID field.*



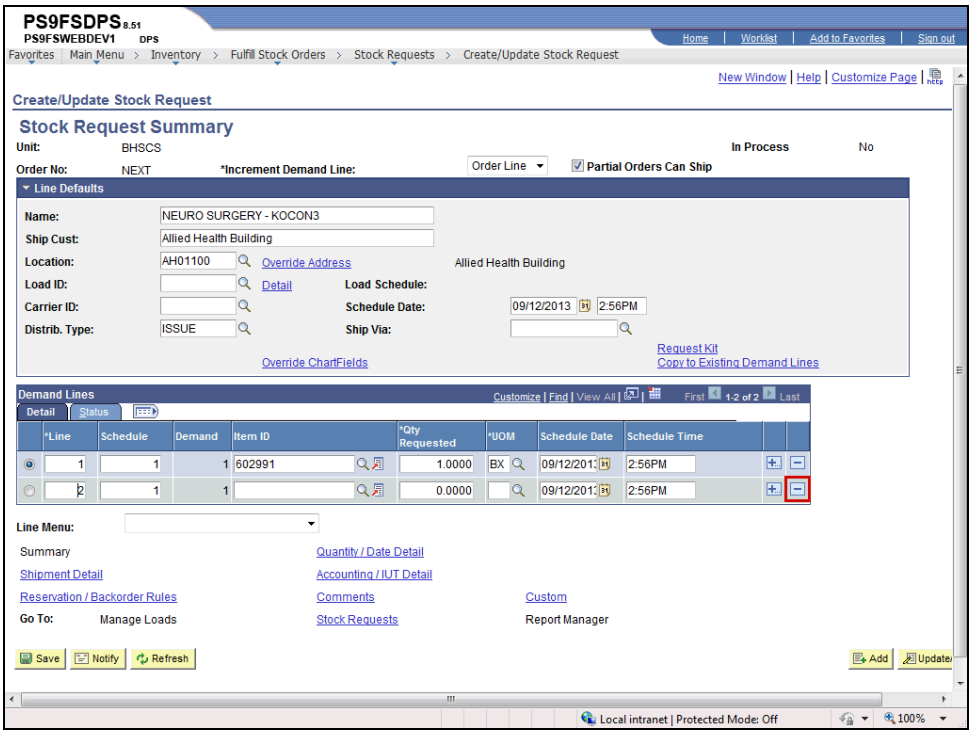
Step	Action
21.	Click the button to the right of the **Description** field.
22.	Click the **contains** list item. contains
23.	Enter the desired information into the **Description** field. Enter "**GLOVE**".
24.	Click the **Look Up** button. Look Up
25.	Click the **602991** link. 602991



Step	Action
26.	Enter the desired information into the **Qty Requested** field. Enter "**1**". ***NOTE: It is highly recommended that you <u>delete</u> all the zeroes in the field before entering the quantity. The system will automatically populate the zeroes when you navigate away from the field.***
27.	***NOTE:*** *The* ***<u>UOM (Unit of Measure) defaults</u>*** *onto the page based upon the item selected; in its standard stocking size.* *For example,* ***UOM*** *could be:* ***EA*** *- Each* ***CS*** *- Case* ***BX*** *- Box* ***RL*** *- Roll* ***NOTE: Please assure that you are selecting the correct 'QUANTITY' desired for the 'UOM' (Unit of Measure) selected.***
28.	If there is another item to enter click on the **(+)** button or press **ALT +7** on the keyboard. Click the **Add multiple new rows at row 1 (Alt+7)** button.
29.	A dialogue box will display asking how many rows you which to add. The row number defaults to 1. You may add as many rows as you need. However, ***<u>blank rows cannot be saved</u>*** and must be deleted in order to save the Stock Request.

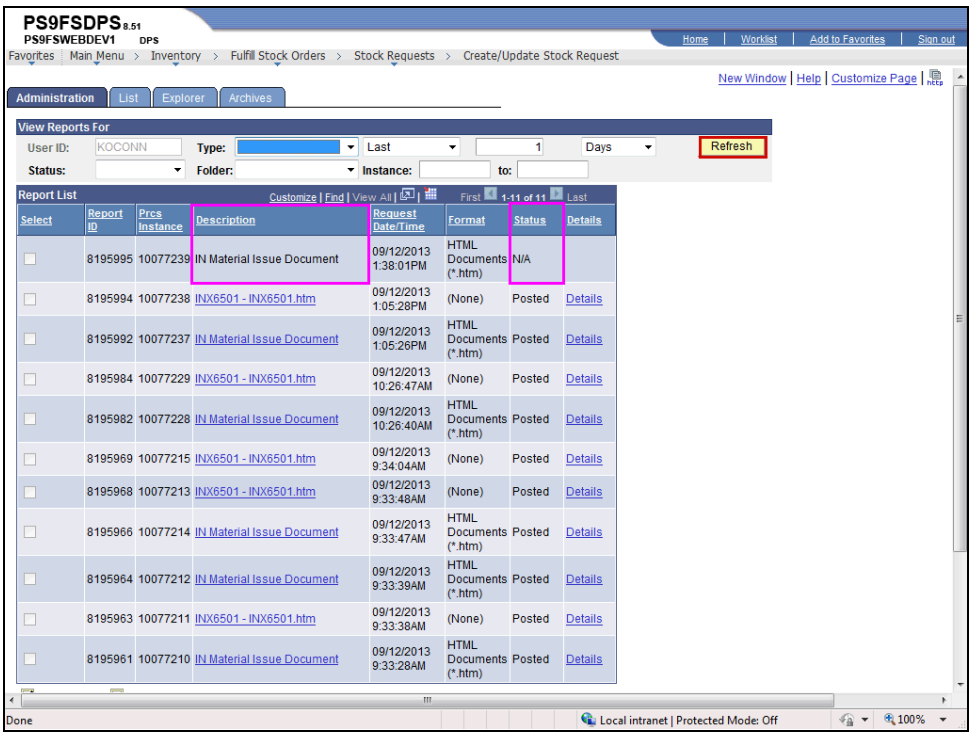


Step	Action
30.	Click the **OK** button. OK

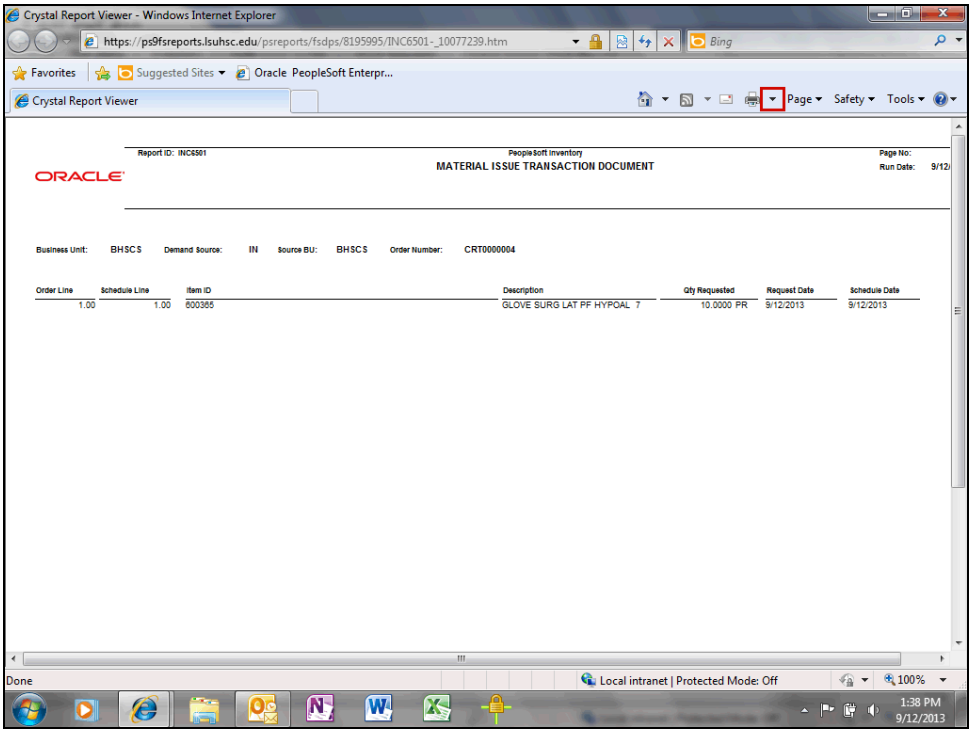


Step	Action
31.	Enter the information for each additional item using the same steps until all items have been entered. ***For training purposes only***, click the **Delete row 2** button.
32.	A warning message displays for you to confirm the delete. Click the **OK** button.
33.	***NOTE: All items must be entered before saving the Stock Request. Any additional items added after saving the Stock Request will not filled.*** Click the **Save** button.
34.	The Order No. displays after saving. ***NOTE: A Shipping Document will be received with each order and must be retained by Dept for any returns or credits.***
35.	Click the **Printer** button.

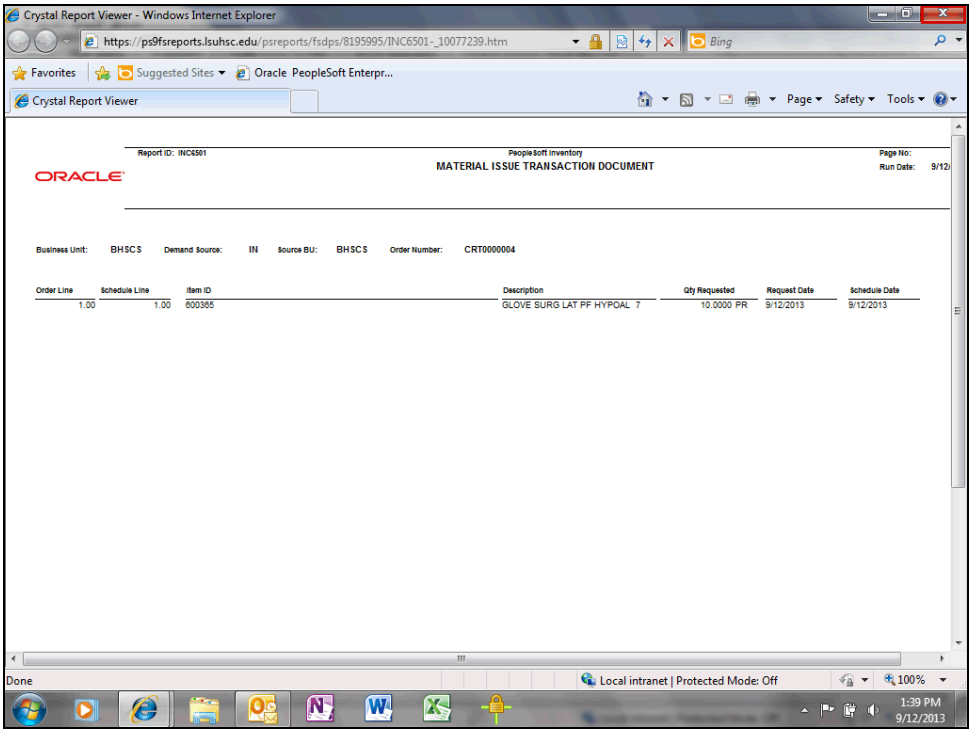
Step	Action
36.	Click the **Report Manager** link. ***NOTE: The Report Manager link is located at the bottom of the page below Schedule Date box.*** Report Manager



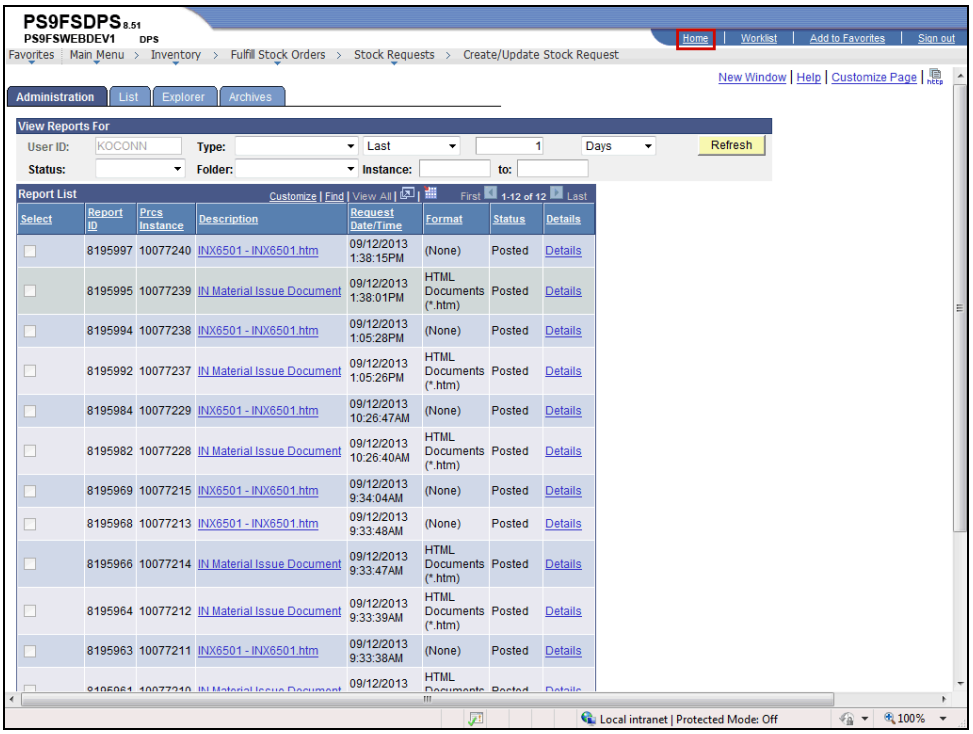
Step	Action
37.	*NOTE: In order to view the Stock Request,* ***IN Material Issue Document****, seen in the Description column, must be a* ***blue link****.* Click the **Refresh** button until the **Status = Posted**. Please wait 10 - 15 seconds between clicks. Refresh
38.	Click the **IN Material Issue Document** link. IN Material Issue Document



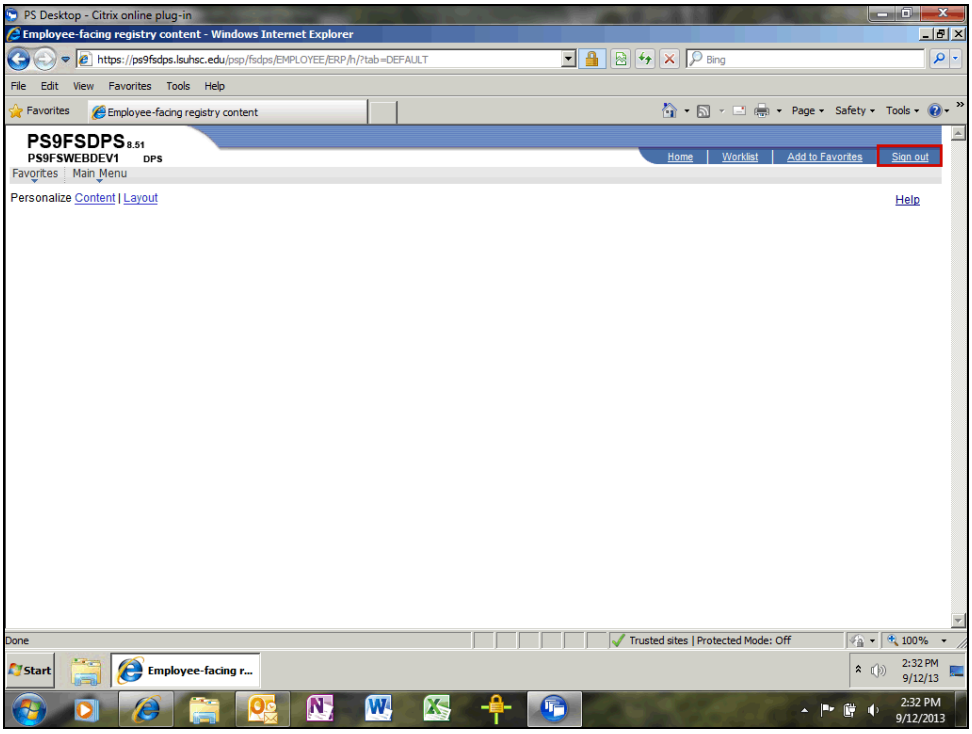
Step	Action
39.	Click the button to the right of the **Printer** field.
40.	Click the **Print...** menu. Print... Ctrl+P
41.	Make any appropriate changes in order to print your document. You would then click the **Print** button to print out a paper copy of the Material Issue Transaction Document. **For training purposes only,** click the **Cancel** button. Cancel



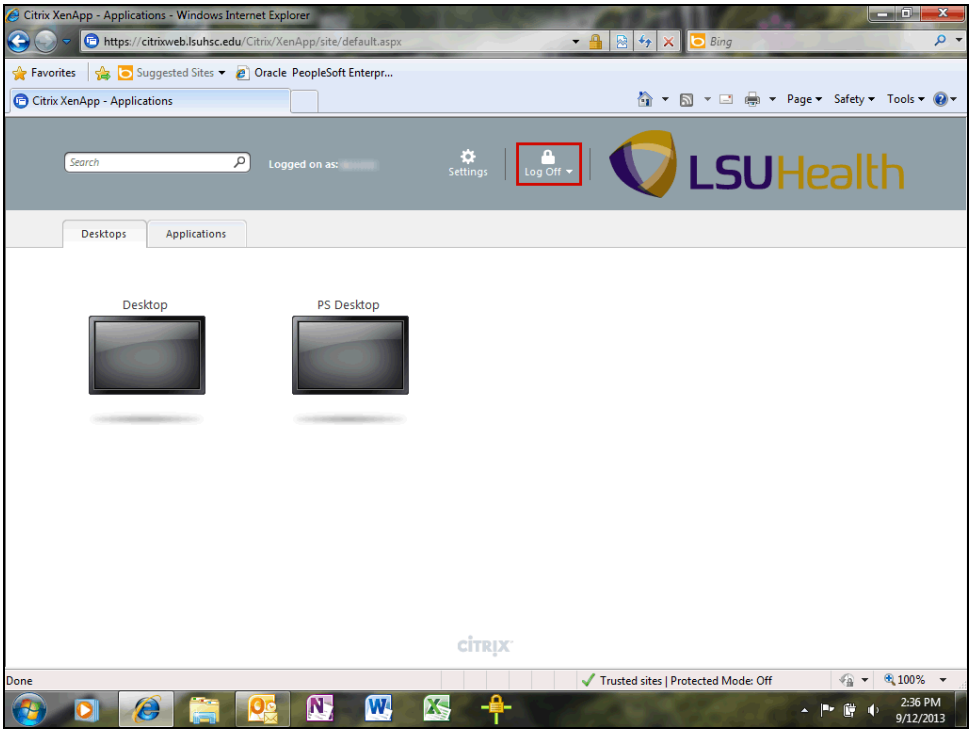
Step	Action
42.	Click the **Close** button.



Step	Action
43.	Click the **Home** link. Home



Step	Action
44.	***Please use the following steps to exit out of PeopleSoft and Citrix.*** Click the **Sign out** link. Sign out
45.	Click the **Close** button.
46.	Click the **Start** button. Start
47.	Click the **Log off** button. Log off



Step	Action
48.	Click the object.
49.	This completes ***Enter a Stock Request***. **End of Procedure.**