



Par Carts InterUnit Transfers and Material Stock Requests - Fluid

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Training Guide
Par Carts InterUnit Transfers and Material Stock
Requests - Fluid

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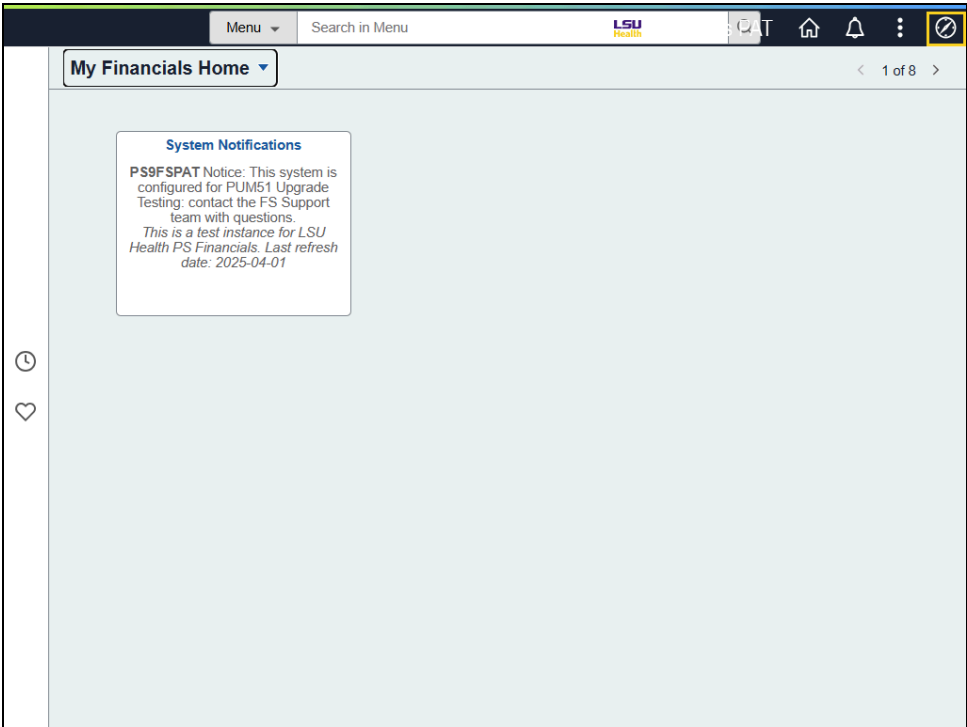
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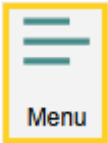
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Add a Tile to My Financials Home

Procedure

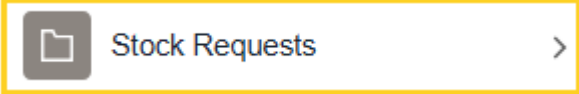
In this exercise you will learn how to **Add a Tile to My Financials Home**.



Step	Action
1.	Navigate to the Material Stock Requests page. Click the NavBar button. 
2.	Click the Menu button. 

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Step	Action
3.	Click the Down button of the scrollbar. <i>NOTE: This will be the only example used for scrolling in this manual.</i>
4.	Click the Inventory menu. 
5.	Click the Fulfill Stock Orders menu. 
6.	Click the Stock Requests menu. 
7.	Click the Maintain Stock Requests button. 
8.	Click the Actions (3 Dots) button. 
9.	Click the Add To Homepage link. 
10.	The <i>page name defaults</i> into the <i>*Title Label</i> . Select which homepage you want to assign the tile to. Click the My Financials Home link. 
11.	A message is displayed stating your tile has been added to the My Financials Home page. Click the OK button. 
12.	Click the Home button. 

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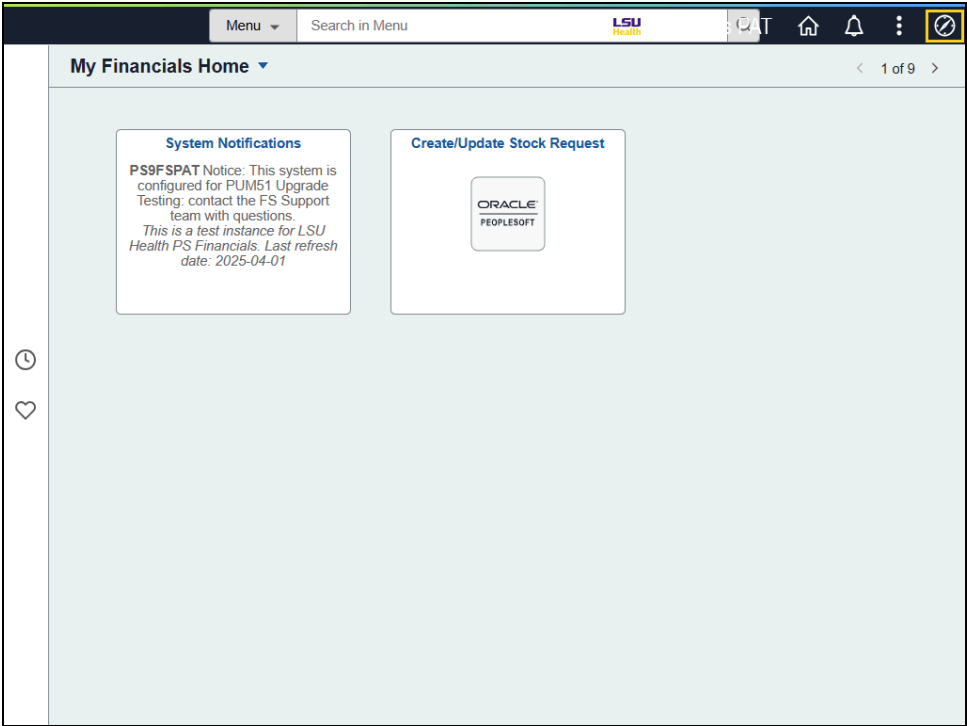
Step	Action
13.	The <i>Create/Update Stock Request</i> tile has been added to the My Financials Home page.
14.	This completes <i>Add a Tile to My Financials Home</i> . End of Procedure.

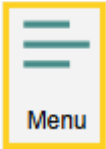
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Enter an Inventory Order using Pre-Defined Carts

Procedure

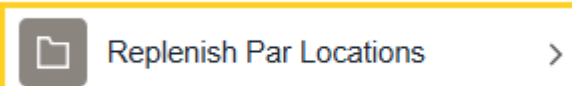
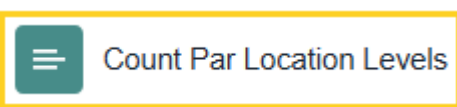
In this topic you will learn how to **Enter Inventory Order using Pre-Defined Carts**.



Step	Action
1.	Click the NavBar button. 
2.	Click the Menu button. 
3.	Scroll down to 'T' in the menu to locate the Inventory option. Click the Down button of the scrollbar. <i>NOTE: This will be the only scroll example used in this topic.</i>

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Step	Action
4.	Click the Inventory menu. 
5.	Click the Replenish Par Locations menu. 
6.	Click the Count Par Location Levels button. 
7.	Pre-defined carts contain medical and office supplies that cannot be charged to a patient account. The carts have been created to make it easier for the Warehouse (LKWHS) and Central Supply (LKCMS) to issue non-patient medical and office supplies to the departments. NOTE: Only the Warehouse (LKWHS) or Central Supply (LKCMS) may be used as the Business Unit when creating a request from a pre-defined cart. The LAK Operating Room (LKORU) cannot be used as the Business Unit since supplies from LKORU cannot be issued to other departments.
8.	You may search for the <i>Business Unit</i> using the Lookup Business Unit button; or, you may enter it directly into the Business Unit field. Click the Look up *Business Unit button. 
9.	In this example, the Lallie Kemp - Warehouse option will be selected. Click the LKWHS - Lallie Kemp - Warehouse link. 
10.	You may search for the <i>Par Location ID</i> using the Lookup Par Location ID button; or, you may enter directly into the Par Location ID field. Click the Look up Par Location ID button. 
11.	There are <i>two sets</i> of pre-defined carts available: <i>medical</i> supplies and <i>office</i> supplies. The <i>medical</i> supplies options list <i>first</i> , and their Par Location ID starts with LK followed by a two-digit number.

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Step	Action
12.	The second set of carts for <i>office</i> supplies start with LKOF. NOTE: Users may not mix medical and office supplies on one cart request. If both are required, two separate cart requests will have to be created.
13.	Once selected, the <i>Par Location ID</i> will default into the <i>Par Location ID</i> field. In this example, the LK11-2067220 - LKWH 11 CARDIOLOGY-EKG will be used as the Par Location ID. Click the LK11-2067220 - LKWH 11 CARDIOLOGY-EKG link.
14.	Click the Search button. 
15.	The Count Par Location Levels panel opens with the selected cart items displayed. NOTE: Please verify you are on the correct cart before you proceed. The Par Count ID = Next and the Status = Unprocessed.
16.	In this example, there are 20 items defined on the cart. There are three (3) options for finding your item(s) to order: 1. View eight (8) items per page and navigate them through the items page by page. 2. Select the View All link and scroll through all 20 items; or 3. Use the Find option to search for an item. NOTE: The system defaults you to the View 8 option.
17.	In this example you will select the View All link, so that you may scroll through all 20 options. Click the View All link. 
18.	All 20 items are listed. A scrollbar displays on the right of the inner panel. Click the View 8 link. 
19.	The original list of 8 items to a page display. Use the left and right arrows to navigate between pages or use the First and Last links to return the first page or navigate directly to the last page. Click the Find button. 

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Step	Action
20.	A search box pop-up allows you to search for an item(s) using the PS #, the Catalog #, or the item Description. <i>If you are on the first page, the item will move to the top of your list.</i> In this example you will search for an item using the PS # 190664 for GLOVE MED NITRILE PF LTX FREE #14-6976C. Enter the desired information into the Enter search string: field. Enter "190664".
21.	Click the OK button. 
22.	NOTE: Do not check/uncheck the Count box or the Sufficient Stock Box. If it is checked, leave it checked. If it is unchecked, leave it unchecked. Making changes to these boxes may prevent your order being received.
23.	<i>The item is displayed first in the list.</i> NOTE: To enter the Request Qty, numbers must be entered in whole numbers (e.g., 1, 2, 3, etc.). <u>Remove</u> all zeroes and decimal points from the field before entering a number. The Quantity <u>must</u> be based on the UOM listed to the right of the Request Qty field. You do not need to enter the decimal or trailing zeroes. Enter the desired information into the Request Qty field. Enter "4".
24.	NOTE: Do <u>not</u> save your request until all items have been entered. Click the Find button. 
25.	In this example you will search by item Description for PS # 124333 WIPES PURPLE SANICLOTH Q86984. Enter the desired information into the Enter search string: field. Enter "WIPES".
26.	Click the OK button. 
27.	<i>The item is displayed at the top of the list.</i> NOTE: To enter the Request Qty, numbers must be entered in whole numbers (e.g., 1, 2, 3, etc.). <u>Remove</u> all zeroes and decimal points from the field before entering a number. The Quantity <u>must</u> be based on the UOM listed to the right of the Request Qty field. You do not need to enter the decimal or trailing zeroes. Enter the desired information into the Request Qty field. Enter "2".

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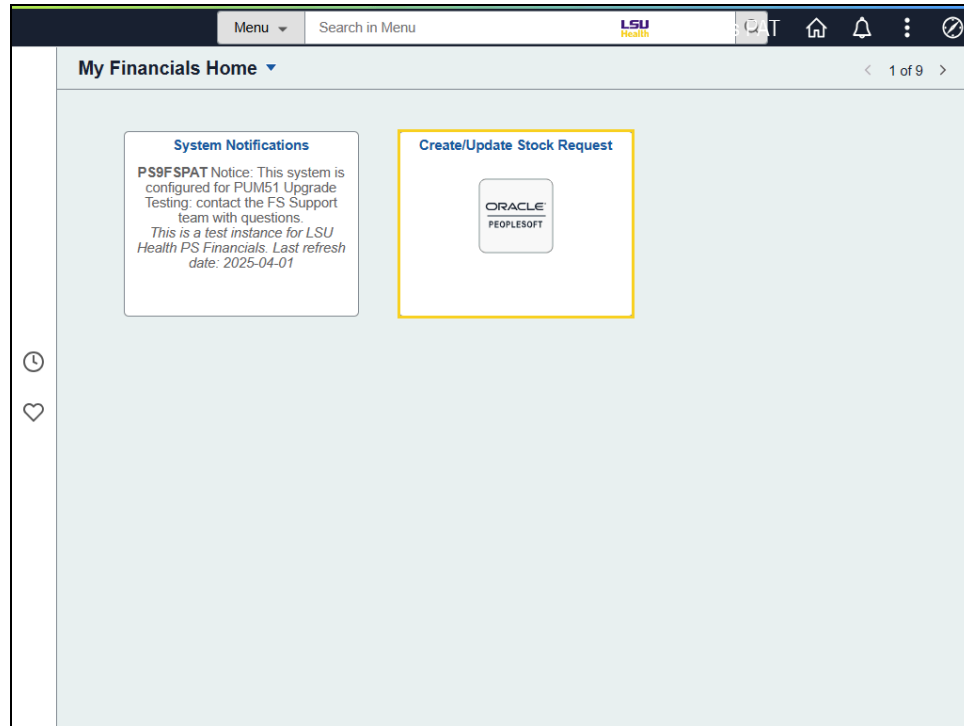
Step	Action
28.	Once all items have been entered, you will then Save your request. <i>If you do not Save the cart before proceeding to another cart or some other process, you will lose your information.</i> NOTE: Separate cart requests must be done for medical and office supplies. Click the Save button. 
29.	The Par Count ID has changed from NEXT to the next available Order No. In this example, the Par Count ID is 31179. The Status remains at Unprocessed.
30.	This completes <i>Enter an Inventory Order using Pre-Defined Carts</i>. End of Procedure.

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Enter an Inventory Order using InterUnit Transfer

Procedure

In this topic you will learn how to **Enter an Inventory Order using InterUnit Transfer**.

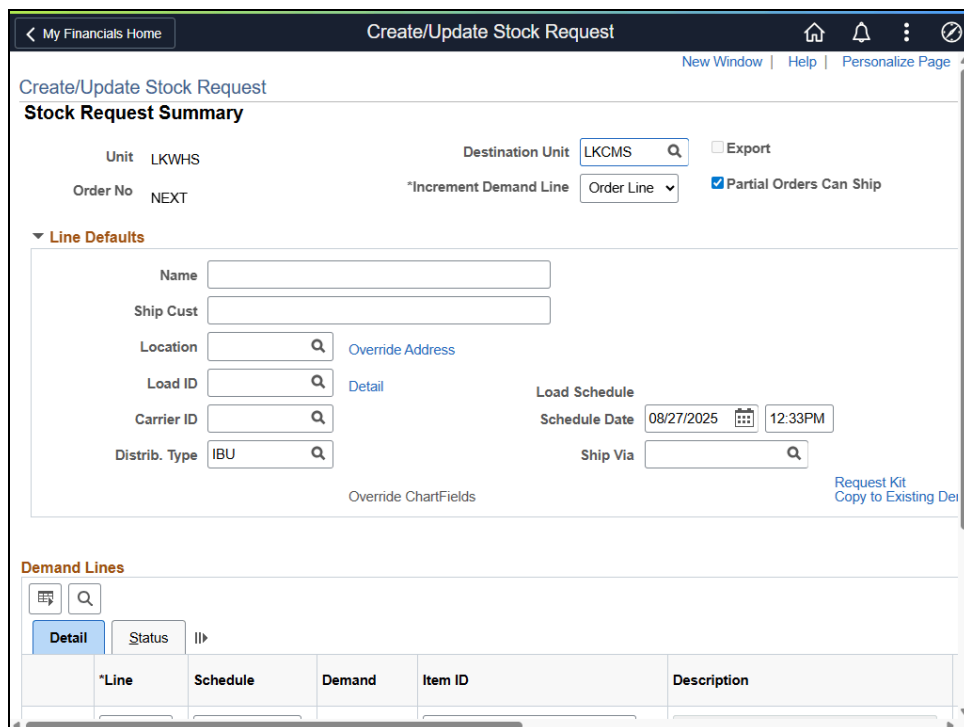


Step	Action
1.	NOTE: The Create/Update Stock Request tile was created in the "Add a tile to My Financials Home." The user can navigate to the Create/Update Stock Request page by selecting NavBar > Menu > Inventory > Fulfill Stock Orders > Stock Requests > Create/Update Stock Requests. Click the Create/Update Stock Requests button.
2.	NOTE: Only Warehouse (LKWHS) and Central Supply (LKCMS) designations may be used for Business Unit when creating a Stock Request. Enter the Business Unit (BU) directly into the BU field, or search for it by selecting the Look up Business Unit button (magnifying glass) to the right of the BU field. Enter the desired information into the Business Unit field. Enter "LKWHS".
3.	Click the button to the right of the Request Type: field. 

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Step	Action
4.	Click the InterUnit Transfer list item. 
5.	Click the Add button. 
6.	NOTE: The Destination Unit is the Business Unit (BU) that will receive the transfer of supplies. In this example, the <i>Warehouse (LKWHS)</i> is the BU <i>transferring</i> the supplies. <i>Central Supply (LKCMS)</i> will be the BU <i>to accept</i> the supplies. The <i>same procedure</i> is used if <i>Surgery (LKORU)</i> is submitting an InterUnit Transfer <u>from</u> LKWHS or LKCMS. Enter the desired information into the Destination Unit field. Enter "LKCMS".



Create/Update Stock Request

Unit: LKWHS Destination Unit: LKCMS ☐ Export

Order No: NEXT *Increment Demand Line: Order Line ☒ Partial Orders Can Ship

Line Defaults

Name:

Ship Cust:

Location: [Override Address](#)

Load ID: [Detail](#)

Carrier ID:

Distrib. Type: IBU

Load Schedule:

Schedule Date: 08/27/2025 12:33PM

Ship Via:

[Request Kit](#)
[Copy to Existing Demand Line](#)

Demand Lines

*Line	Schedule	Demand	Item ID	Description

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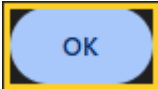
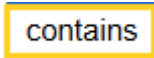
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Step	Action
7.	Press the Tab button to exit out of the Destination Unit . The system will then automatically default the appropriate BU Ship Cust , Location and Chartfields information. Press [Tab] .
8.	You may search for items using one of two methods: 1. Enter the PS # <i>directly</i> into the Item ID field; or 2. Search for an item using the <i>Look up Item ID</i> button. Both will be demonstrated in this exercise.

Step	Action
9.	<i>NOTE: Only items that will be <u>charged</u> to patient accounts may be ordered through InterUnit Transfer.</i> Enter the desired information into the field. Enter " 114980 ". <i>NOTE: Tab out of the field after entering the Item ID so that the UOM will default. The UOM <u>cannot</u> be changed.</i>

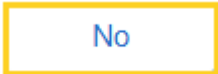
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Step	Action
10.	NOTE: Remove <u>all</u> zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes. Enter the desired information into the *Qty Requested field. Enter "2".
11.	NOTE: Do <u>not</u> Save the request until <u>all</u> items have been entered. Any items entered after saving may <u>not</u> be received by the Warehouse or Central Supply. This depends on the timing of the print. If you have more items you wish to order, you can add lines by clicking the plus (+) sign at the far right of Line 1. Click the Add multiple new rows at row 1 button. 
12.	A pop-up box displays asking how many lines you wish to add. It defaults to one (1). You may add as many lines as you need. However, any lines you do not use must be deleted to save your request. Click the OK button. 
13.	Click the Line 2 Look up Item ID button. 
14.	You may search using any of the listed criteria: Item ID, Description, Item Group, or Family. When searching for medical products using Description, you may also use the <i>catalog number</i> associated with the item. <i>Catalog numbers</i> are usually found within the item description. You may need to use a wildcard (%) in front of the catalog number to obtain the desired results.
15.	Click the button to the right of the Description: begins with field. 
16.	Click the contains list item. 
17.	Enter the desired information into the Description: field. Enter "GAUZE".
18.	Click the Search button. 

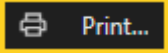
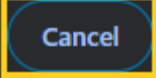
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Step	Action
19.	Click the 114897 GAUZE ELASTIC KLING 4" 2236 link. 
20.	The PS # and the UOM default into their respective fields. <i>NOTE: Remove <u>all</u> zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes.</i> Enter the desired information into the *Qty Requested field. Enter " 2 ".
21.	<i>NOTE: Do <u>not</u> Save the request until <u>all</u> items have been entered. Any items entered after saving may <u>not</u> be received by the Warehouse or Central Supply. This depends on the timing of the print.</i> Click the Save button. 
22.	Once saved, the Order No. will change from <i>NEXT</i> to a number beginning with SR followed by eight (8) digits.
23.	At the top right of the page, you will see the Print icon. <i>NOTE: According to the size of your screen, you may need to scroll to view the icon.</i> Click the Print button. 
24.	A dotted line will display around the Print icon. This indicates that the print process has begun. Go to the Report Manager link directly below the Qty Requested field to continue the print process.
25.	Click the Report Manager link. 
26.	Click the No button. 

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Step	Action
27.	The Report Manager page displays. In the Description field, you will see a <i>blue</i> link called INX6501 - INV6501.html. This is the 'In Material Issue Document'. If the link is <u>not</u> blue, intermittently click the Refresh button until the Status = Posted and the blue link displays. Click the INX6501 - INX6501.htm link. 
28.	The Material Stock Request displays. You can print a hard copy of the request using the Customize icon. Click the Ellipsis (3 stacked dots) button. 
29.	Click the Print... Ctrl+P list item. 
30.	Normally, you would select your parameters and then click the Print button. For <u>training purposes only</u>, click the Cancel button. 
31.	Click the PeopleSoft Inventory Close tab. 
32.	This completes <i>Enter Inventory Order using InterUnit Transfer</i>. End of Procedure.

Enter a Material Stock Request

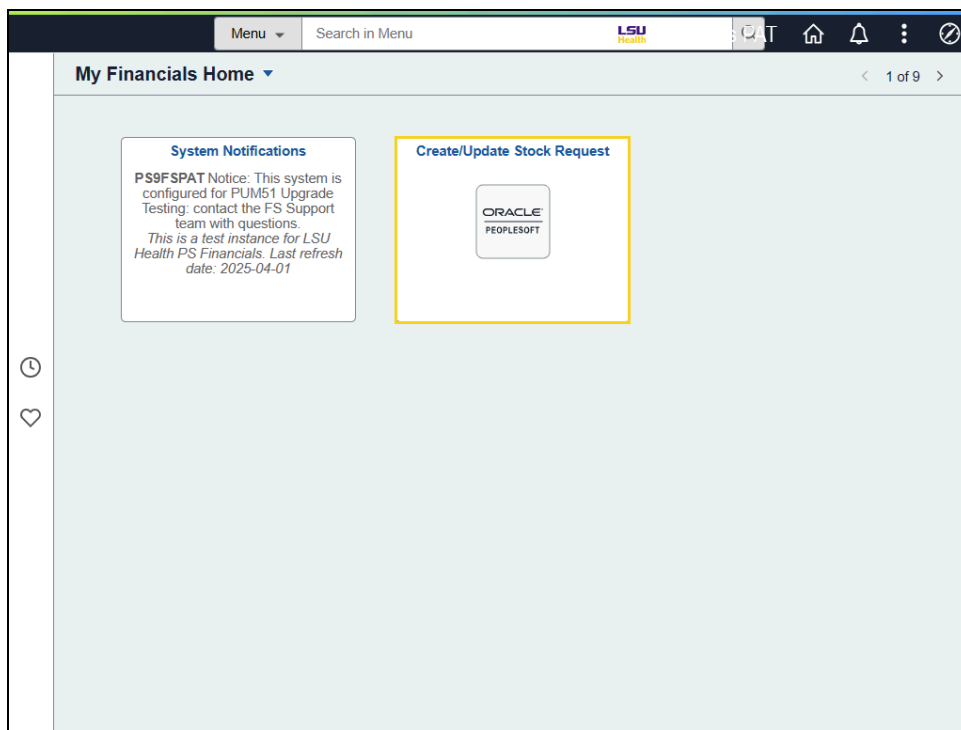
Procedure

In this topic you will learn how to [Enter a Material Stock Request](#).

Step	Action
1.	<i>NOTE: The steps outlined in this topic are for creating a Material Stock Request only. Material Stock Requests are for ordering only items that <u>cannot</u> be requested through Pre-Defined carts or InterUnit Transfer. Please see the Enter Inventory Order using Pre-Defined Carts and the Enter Inventory Orders using InterUnit Transfer for request instructions for those topics.</i>

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Step	Action
2.	NOTE: The Create/Update Stock Request tile was created in the "Add a tile to My Financials Home." The user can navigate to the Create/Update Stock Request page by selecting NavBar > Menu > Inventory > Fulfill Stock Orders > Stock Request > Create/Update Stock Request. Click the Create/Update Stock Request button. 
3.	NOTE: Only Warehouse (LKWHS) and Central Supply (LKCMS) designations may be used for Business Unit when creating a Stock Request. Click the Look up Business Unit button. 
4.	NOTE: Only Warehouse or Central Supply (e.g., LKWHS or LKCMS) designations can be used for Business Unit when creating a Stock Request. Click the LKWHS - Lallie Kemp - Warehouse link. 

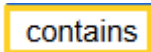
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Step	Action
5.	NOTE: The Order No. defaults to next and <u>must</u> remain as defaulted. Changing this field to anything other than NEXT will cause errors. The Request Type field defaults as Internal Issue and will remain as defaulted if creating a Material Stock Request. Clicking the drop-down menu will allow you to change the Request Type if the user wishes to enter an InterUnit Transfer. In this example, the Request Type will remain as Internal Issue. Click the Add button. 
6.	The Location is a required field. It is the department requesting the item(s) and where the item(s) will be charged. You can search for your seven-digit department id using the Look up Department ID or enter it directly into the field. Enter the desired information into the Location field. Enter "2058980".
7.	The Name field is also a required field and is <u>not</u> case sensitive. You may enter the Requester's Name or User ID into the Name field. This identifies the person requesting the item(s), so if an issue arises the warehouse knows who to contact. Enter the desired information into the Name field. Enter "Karen ext. 1234".
8.	Click the Override ChartFields link. 
9.	You will enter the seven-digit department number into the Dept field. <i>This is the same number you entered for Location.</i> NOTE: The Dept must be entered <u>prior</u> to entering Item Information. Failure to do so will require the user to enter the department information on every line of the Stock Request or start the Stock Request over.
10.	NOTE: Dept is the only information you will enter on the ChartField Override panel. Enter the desired information into the field. Enter "2058980".
11.	Click the OK button. 
12.	The Ship Cust information defaults once the Dept is entered on the ChartField Override panel.

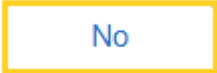
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Step	Action
13.	Item information will be entered. You can search for items using the Look up Item ID button. <i>NOTE: If you know the PS #, you may enter it directly into the Item ID field.</i> Click the Look up Item ID button. 
14.	You can search using any of the listed criteria: <i>Item ID, Description, Item Group, or Family</i>. When searching for medical products using description, you may also use the <i>catalog number</i> associated with the item. <i>Catalog numbers</i> are usually found at the end of the item description. You may need to place a wildcard (%) in front of the <i>catalog number</i> to obtain the desired result (e.g., %1088)
15.	Click the button to the right of the Description begins with field. 
16.	Click the contains list item. 
17.	In this example, you will search for WIPES (GREY) SANICLOTH AF3 P13. Enter the desired information into the Description: field. Enter "WIPES".
18.	Click the Search button. 
19.	Click either the Item ID or the Description link to select an item. Click the 190653 - WIPES (GREY) SANICLOTH AF3 P13 link. 
20.	<i>NOTE: The Item ID defaults into the Item ID field. The UOM also defaults onto the page once the item is selected. The UOM <u>cannot</u> be changed.</i>
21.	<i>NOTE: Remove <u>all</u> zeroes from the field before entering the quantity to prevent input errors from occurring. Quantity must be entered based on the defaulted UOM and must be entered in whole numbers (e.g., 1, 2, 3, etc.) You do not need to enter the decimal or trailing zeroes.</i> Enter the desired information into the *Qty Requested field. Enter "1".
22.	<i>NOTE: Do not save the Stock Request until all items have been added. The Stock Request will automatically be routed to the Warehouse or Central Supply once it is saved. Any items added after the Stock Request is saved will <u>not</u> be transmitted.</i>

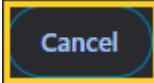
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Step	Action
23.	The Sanicloth Wipes will be the only item entered. NOTE: <u>All</u> items <u>must</u> be entered <u>before</u> <u>saving</u> the Stock Request. Any items entered after saving will <u>not</u> be received by the Warehouse or Central Supply. Click the Save button. 
24.	Once saved, the Order No. changes from <i>NEXT</i> to the next available Order No. All order numbers begin with SR (i.e., Stock Request) followed by an eight-digit number.
25.	Click the Print button. 
26.	A dotted line displays around the Print icon indicating the print process has begun. NOTE: A Warning message <u>may</u> display stating there is unsaved data on the page. You may either select Yes to re-save the document, or No to continue.
27.	Click the Report Manager link. 
28.	A message displays asking if you wish to Save your changes. Click the No button. 
29.	On the Report Manager page, the top line is your most recent print request. You will see a blue link in the Description field called INX6501 - INX6501.htm. This is the 'In Material Issue Document'. If the link is not blue, click the Refresh button until the Status = Posted and the blue link displays. Click in the INX6501 - INX6501.htm field. 
30.	The Material Stock Request displays. Select Ellipsis (three dots) to print a hard copy of the request. Click the Ellipsis button. 

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Step	Action
31.	Click the Print button. 
32.	Normally, you would select your parameters and then click the Print button. For <u>training purposes only</u> , click the Cancel button. 
33.	Click the PeopleSoft Inventory Close tab. 
34.	Click the Stock Request Summary button. 
35.	This completes <i>Enter a Material Stock Request</i> . End of Procedure.