## **PeopleSoft Training**

## Material Stock Requests 9.2 HCSD

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## Material Stock Requests 9.2 - HCSD

### **Material Stock Requests**

Enter a Stock Request

#### Procedure

In this topic you learn how to Create/Update a Stock Request.

NOTE: The LKWHS Business Unit is used for training purposes only in this exercise.

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Step	Action
1.	Click the Main Menu button. Main Menu -
2.	Click the <b>Inventory</b> menu.
	Inventory
3.	Click the Fulfill Stock Orders menu.
	Fulfill Stock Orders
4.	Click the Stock Requests menu.
	Stock Requests

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

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Create/Update Stock Requests	5			
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Eind an Existing value Add a New	value			
Business Unit: LKWHS Q				
Order No: NEXT Q				
Request Type: Internal Issue	~			
Add				
Find an Existing Value   Add a New Value	ie			

Step	Action
6.	NOTE: Only Warehouse or Central Supply Unit (e.g. LKWHS or LKCMS) designations can be used for Business Unit when creating a Stock Request.

Favorites - Main Menu - Inve	ntory • > Fulfill Stock Orders • > Ste	ock Requests 🔻 > Create/Update Sto	ck Request	
PS9ESUPG			Home Worklist	Add to Favorites Sign out
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Create/Update Stock Requests				New Window   Help   🗮
Eind an Existing Value Add a New	Value			
Business Unit: LKWHS Q				
Order No: NEXT Q				
Request Type: Internal Issue	<b>~</b>			
Add	e			

Step	Action
7.	NOTE: 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.
8.	Click the Add button.
9.	The Name field is a required field and is not case sensitive. <u>Enter the Requester's</u> <u>Name or User ID into the Name field.</u> This identifies the person requesting the item(s) so if an issue arises, the warehouse will know whom to contact. Enter the desired information into the Name field. Enter "Cruella Deville - ext. 2654".

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Step	Action
10.	The Location field is a required field. You will search for or enter your seven-digit Department ID in the Location field. The Location is the department requesting the item and where the item(s) will be charged.
11.	All Department ID numbers begin with "20". Any department number that does not begin with "20" <u>cannot</u> be used when creating a Stock Request. For this example, the search option will be demonstrated.
12.	Click the Look up Location button.

Favorites - Main Menu - > Inventory - > Fulfill Sto	ck Orders * > Stock Requests * > Create/Update Stock Request
PS9FSUPG	Look Up Location R Home Worklist Add to Favorites Sign out
FSCM 9.2 PSTools 8.53 All - Search	Help
PS9FSWEBDEV11	Sottle:
	New Window   Help   Personalize Page
Create/Update Stock Request	Description: begins with
Stock Request Summary	Look Up Clear Cancel Basic Lookup
Unit LKWHS	In Process No
Order No. NEVT	Search Results ers Can Ship
	View 100 First 4 1-206 of 206 Last
	Location Code Description
Name Cruella Deville - ext. 2654	002100023 Telehealth Monitoring
Ship Cust	2010200 Related Benefits Clearing
Location Querride Ad	2018710 Administration
	2018711 Administration-Dept 2
Load ID Q Detail	2028715 Statewide Adjustments
Carrier ID Q	2036220 Medicine Inpatient Care
Distrib. Type ISSUE	2036320 Intensive Care Unit (ICU)
	2037020 Operating Room Request Kit
Override Ch	2037060 Recovery Room Copy to Existing Demand Lines
	2047100 Emergency Room
	2047350 Disease Management
Datail Status	2047630 Out Patient Clinic - Albany
Detail Grands Freedy	2047632 Wound Care Clinic
*Line Schedule Demand Item ID	2047700 Dental Clinic chedule Time
	2047730 Eye Clinic
	2047760 OB/GYN Clinic
Line Menu	204/7/0 Oncology Clinic
Line menu	2047/90 Parish Prison Clinic
Summary	2047840 Pediatric Clinic
Shipment Detail	2047850 LK Out Patient Clinic
	2047070 vvalk in Clinic/Minor Care (EK)
Reservation / Backorder Rules	2047930 Filviniecuous Disease Gimic
Go To: Manage Loads	2047370 rodacco Contilli 2048705 Compliance Office
	2040785 Compliance Onice
Save 🔄 Notify 🏟 Refresh	2058370 Motor Pool
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Step	Action
13.	If you know the last four (4) digits of the department number, you can utilize the wildcard for your search. The % sign is the wildcard and takes the place of unknown numbers or letters. The % sign <u>must</u> be entered in front of the last four (4) digits of your department ID (e.g. %7100) to retrieve a list of department IDs ending in 7100.
14.	You can also click the drop-down arrow to the right of the Location Code and change the search parameter from "begins with" to "contains". You will not need to enter a wildcard using this method. This method will be demonstrated in the following example.
15.	Click the button to the right of the <b>Location Code</b> field.
16.	Click the <b>contains</b> list item.
17.	Enter the desired information into the Location Code field. Enter "7100".
18.	Click the Look Up button.

Favorites - Main Menu - > Inventory - > Fulfill S	tock Orders 🔹 > Stock Requests 🔹 > Create/Update Stock Request
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	In Drocess No
Order No. NEYT	*Increment Demand Line Order Line V Partial Orders Can Ship
✓ Line Defaults	
Name Cruella Deville - ext 2654	
Ship Cust	
	c SetID: LAKMC
	Location Code: contains V 7100
Carrier ID Q	Description: begins with V
Distrib. Type ISSUE	
	Look Up Clear Cancel Basic Lookup Request Kit
Override (	Copy to Existing Demand Lines
	View 100 First 1 of 1 Last
Detail Status (TTT)	Location Code Description
A ine Schedule Demand Item ID	2047100 Emergency Room
	Q 3 0.0000 04/07/201 2:59PM
Line Menu	
Summary	Quantity / Date Detail
Shipment Detail	Accounting / IUT Detail
Reservation / Backorder Rules	Comments Custom
Go To: Manage Loads	Stock Requests Report Manager
Save Notify CRefresh	E Add Z Update

Step	Action
19.	Click the <b>2047100</b> link.

Favorites • Main Menu • Inventory •	> Fulfill Stock Orders * > Stoc	k Requests 🔹 > 0	Create/Update Stock F	Request	
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Create/Update Stock Request				New Window	Help   Personalize Page   📙
Stock Request Summary Unit LKWHS	*Increment Dem	and Line Order Lin	e 🗸 🔽 Partial O	rders Can Ship	In Process No
✓ Line Defaults					
Name Cruella Deville - ex	t. 2654				
Ship Cust Emergency Room					
Location 2047100 × Q	Override Address	Emergency Ro	om		
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Step	Action
20.	The Ship Cust defaults once the Location is entered.
21.	Click the Override ChartFields link. Override ChartFields

Favorites - Main Menu - Inventory - Fulfill Stock Orders - Stock Requests - Create/Update Stock Request	
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Reservation / Backorder Rules Comments Custom	
Go To: Manage Loads Stock Reguests Report Manager	
Save E Notify & Refresh	🕒 Add 🖉 Update
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Step	Action
22.	You will enter your seven digit department number into the Dept field. This is the same number as you entered for the Location.
	NOTE: The Dept <u>must</u> be entered prior to entering Item Information. Failure to do so in the Chartfield Override will require the user to enter the department information on every line of the Stock Request. Or, if you forget and item information is entered first, the user may choose to start over.
23.	Enter the desired information into the <b>Dept</b> field. Enter "2047100". NOTE: The Dept is the only information you need to enter on the ChartField Overrides page.
24.	Click the <b>OK</b> button.

Favorites • Main Menu • Inventory •	> Fulfill Stock Orders * > Sto	ock Requests 🔻	> Create	Update Stock I	Request		
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Location 2047100	Override Address	Emergency	Room				
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Step	Action
25.	Click the Look up Item ID button.
26.	You can search by any of the listed criteria. When searching for medical products using the Description, you may also use the catalog number associated with the item. Catalog numbers are usually found at the end of the item description. You will need to place a wildcard (%) in front of the catalog number to obtain the desired results (e.g. %1883).
27.	Click the button to the right of the <b>Description</b> field.
28.	Click the <b>contains</b> list item.
29.	Enter the desired information into the <b>Description</b> field. Enter "GLOVE".
30.	Click the Look Up button.
31.	You can click either the Item ID or the Description link to select an item. Click the <b>118072 - GLOVE BIOGEL PF SZ 7.0 #82670</b> link. 118072 GLOVE BIOGEL PF SZ 7.0 #82670

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Step	Action
32.	Even though you clicked on the Description, the Item ID number defaults into the Item ID field.
33.	<i>NOTE: The UOM defaults onto the page once the item is selected. The UOM <u>cannot</u> be changed.</i>
34.	Click in the <b>Qty Requested</b> field.
35.	<ul> <li>NOTE: Remove all zeros from the field before entering the quantity to prevent input errors from occurring.</li> <li>Click the X object to remove the zeroes and decimal point from the field.</li> </ul>
36.	Enter the desired information into the <b>Qty Requested</b> field. Enter " <b>1</b> ". <i>NOTE: You do not need to enter the decimal or trailing zeros.</i>
37.	Additional lines can be added to the page if you are requesting multiple items. <i>NOTE:</i> <u>Do not save</u> the Stock request until all items have been added. The Stock Request will automatically be sent to the Warehouse or Central Supply once it is saved. Any items added after it is saved will not be transmitted. Click the Add multiple new rows at row 1 button.

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Save Notify Crefresh		🗈 Add 🌌 Upda
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Step	Action
38.	A prompt box displays. Enter the number of rows you wish to add; the system defaults to 1.
	NOTE: Blank rows cannot be saved, so only add the number of rows needed.
	Click the <b>OK</b> button.

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Step	Action
39.	Click the Line 2 Look up Item ID button.
40.	Enter the desired information into the <b>Description</b> field. Enter " <b>BATTERY</b> ".
41.	Click the Look Up button.
42.	Click the <b>123873 - BATTERY AA ALKALINE</b> link. 123873 BATTERY AA ALKALINE
43.	Click in the <b>Qty Requested</b> field.
44.	Click the X object.
45.	The UOM is EA, so the batteries can be ordered individually. Enter the desired information into the <b>Qty Requested</b> field. Enter " <b>4</b> ".
46.	<i>NOTE: <u>All items must</u> be entered <u>before</u> saving the stock request. Any items entered after saving will <u>not</u> be received by the Warehouse. Click the <b>Save</b> button.</i>
	Save

ravorites • Inventory • > Fulfill	Stock Orders * > Stock Requests * > Create/U	Jpdate Stock Request
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Step	Action
47.	Once saved, the Order No. changes from NEXT to the Order No:. All order numbers begin with SR followed by a seven (7) digit number.

Favorites - Main Menu - Inventory -	> Fulfill Stock Orders -> Sto	ck Requests 💌	> Create	Update Stock	Request			
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Step	Action
48.	Click the <b>Printer</b> button to begin the print process.

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Step	Action
49.	Click the <b>Report Manager</b> link located at the bottom of the page.
	NOTE: When prompted with the message that there is unsaved data on the page, you may either select OK to re-save the document, or Cancel to continue. Since
	there was no change to the document, click Cancel. Report Manager
50.	A warning message displays stating you have unsaved data. Click OK to return to the page and Save, or click the Cancel button to continue.
	Click the <b>Cancel</b> button.
51.	Once the document is processed, you will see a blue link in the Description field called "INX - INX650.1.htm". This is the "IN Material Issue Document".
	If the link is not yet blue, periodically click the <b>Refresh</b> button until the <b>Status</b> = <b>Posted</b> and <b>INX6501 - INX6501.htm</b> becomes a blue link.

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Step	Action
52.	Click the <b>INX6501 - INX6501.htm</b> link to view and print your stock request. INX6501 - INX6501.htm
53.	Click the <b>INX6501.htm</b> link. INX6501.htm

# Training Guide

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Step	Action
54.	The Material Stock Request displays. Select File, Print to print a hard copy of your request.
	Click the Close button.

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Step	Action
55.	Click the <b>Report Detail Close</b> button.
56.	Click the <b>Home</b> link. Home
57.	This completes <i>Create/Update a Stock Request</i> . End of Procedure.