PeopleSoft Training

Material Stock Requests 9.2
HCSD

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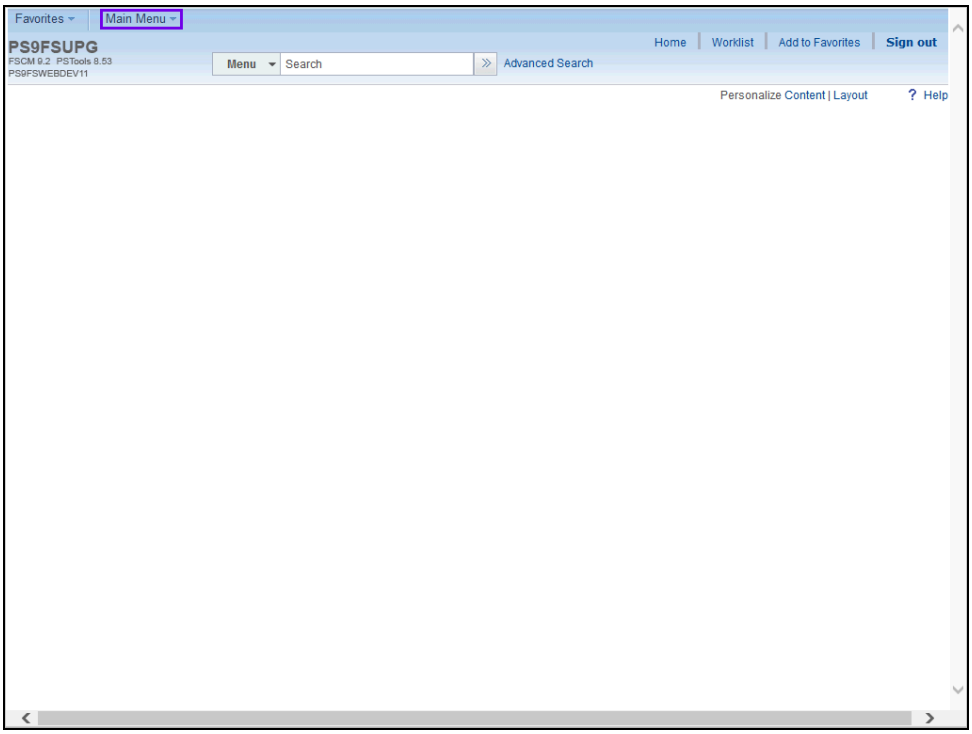
Material Stock Requests

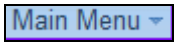
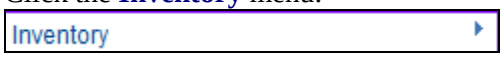
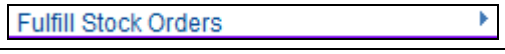
Enter a Stock Request

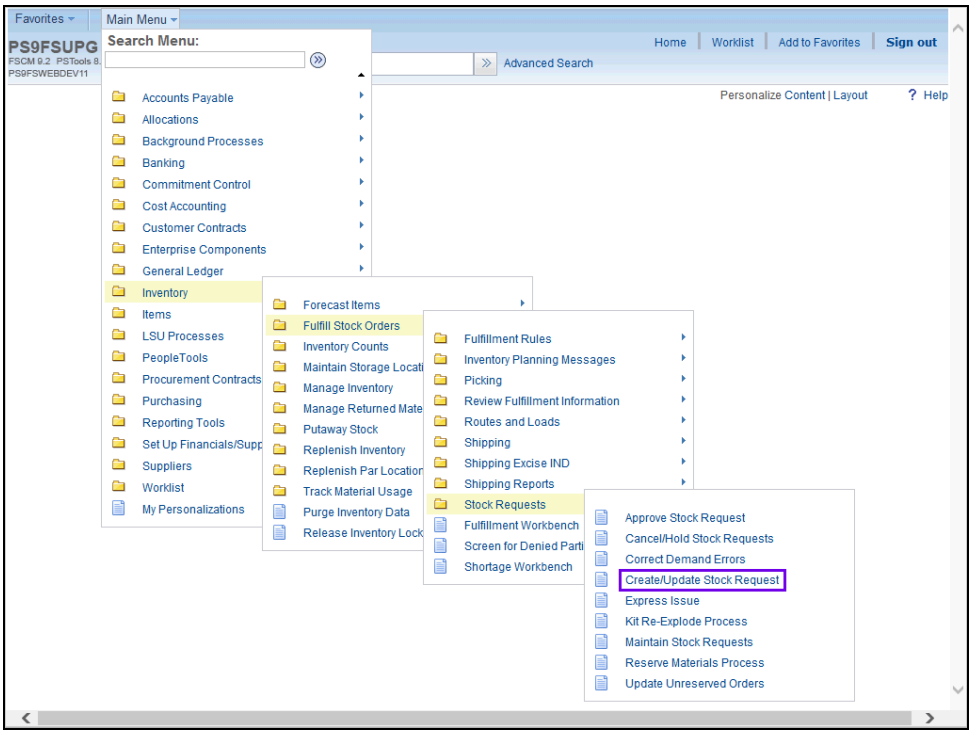
Procedure

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

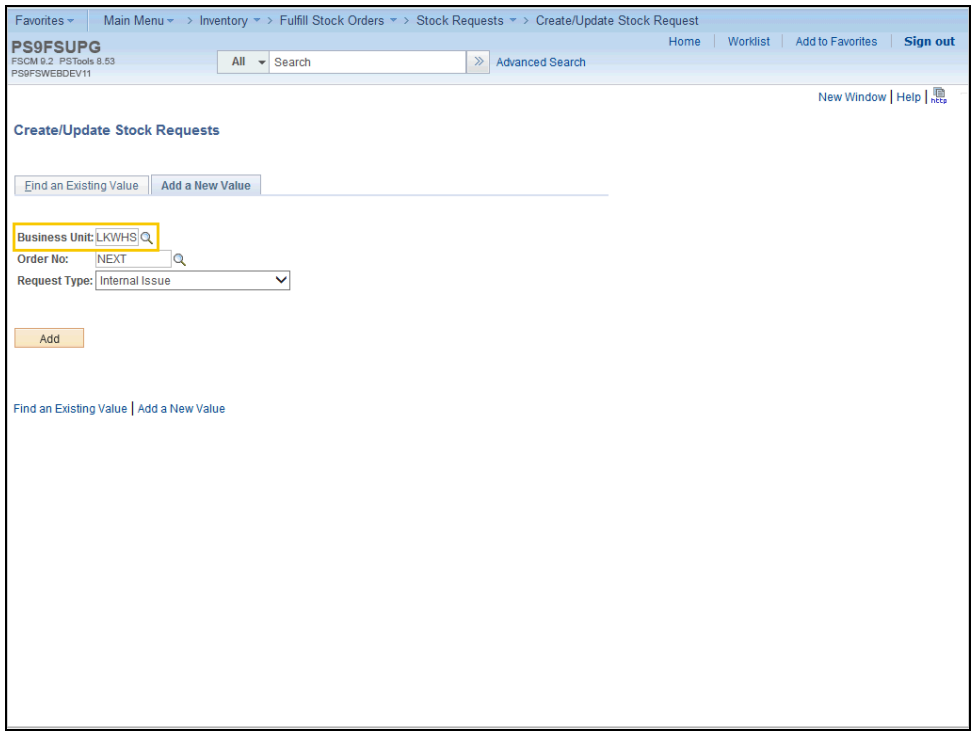
NOTE: The LKWHS Business Unit is used for training purposes only in this exercise.



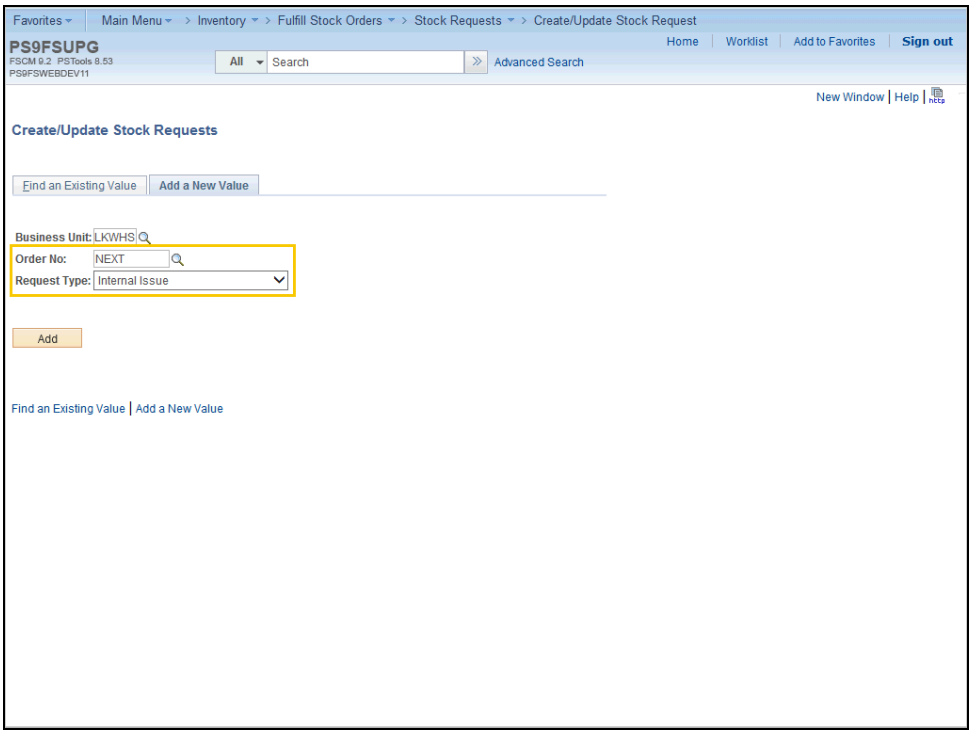
Step	Action
1.	Click the **Main Menu** button. 
2.	Click the **Inventory** menu. 
3.	Click the **Fulfill Stock Orders** menu. 
4.	Click the **Stock Requests** menu.



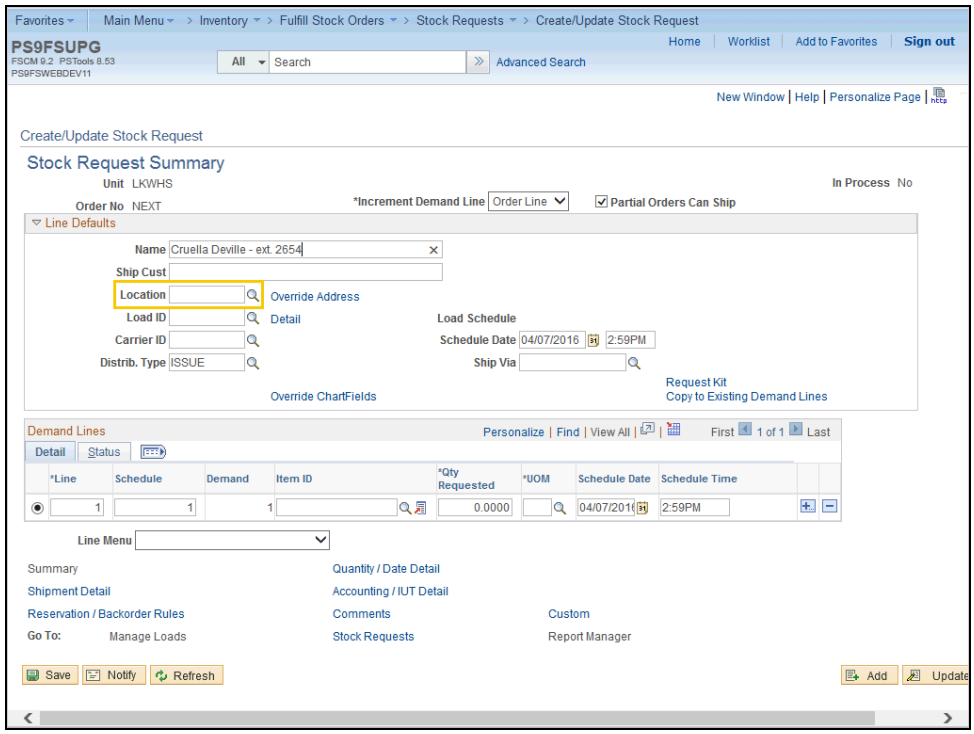
Step	Action
5.	Click the **Create/Update Stock Request** menu. Create/Update Stock Request



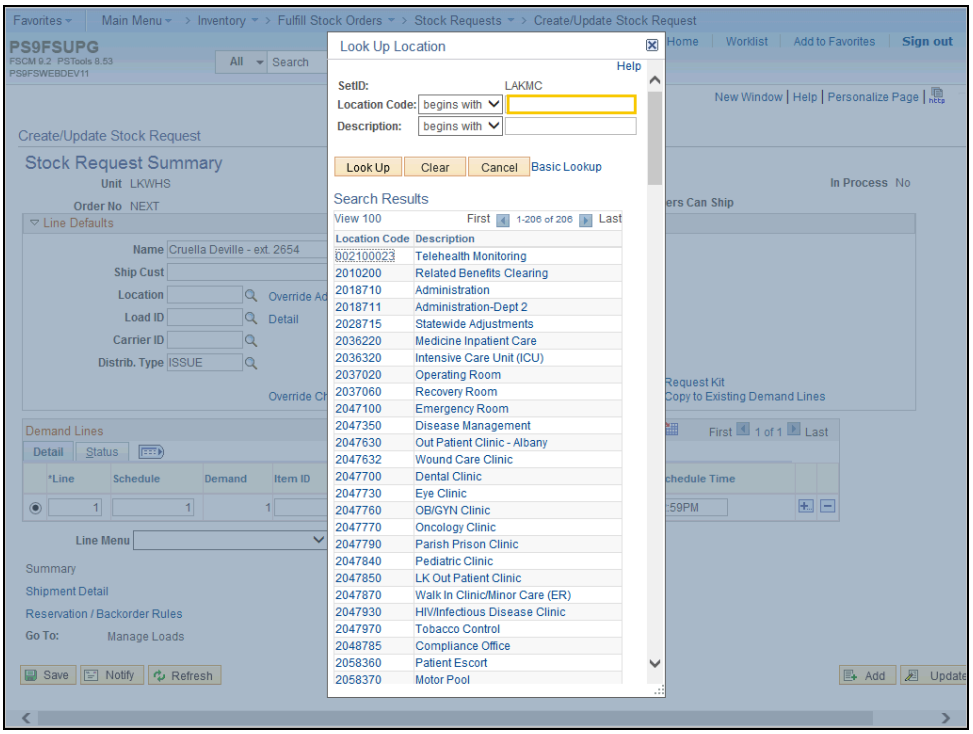
Step	Action
6.	***NOTE: Only Warehouse or Central Supply Unit (e.g. LKWHS or LKCMS) designations can be used for Business Unit when creating a Stock Request.***



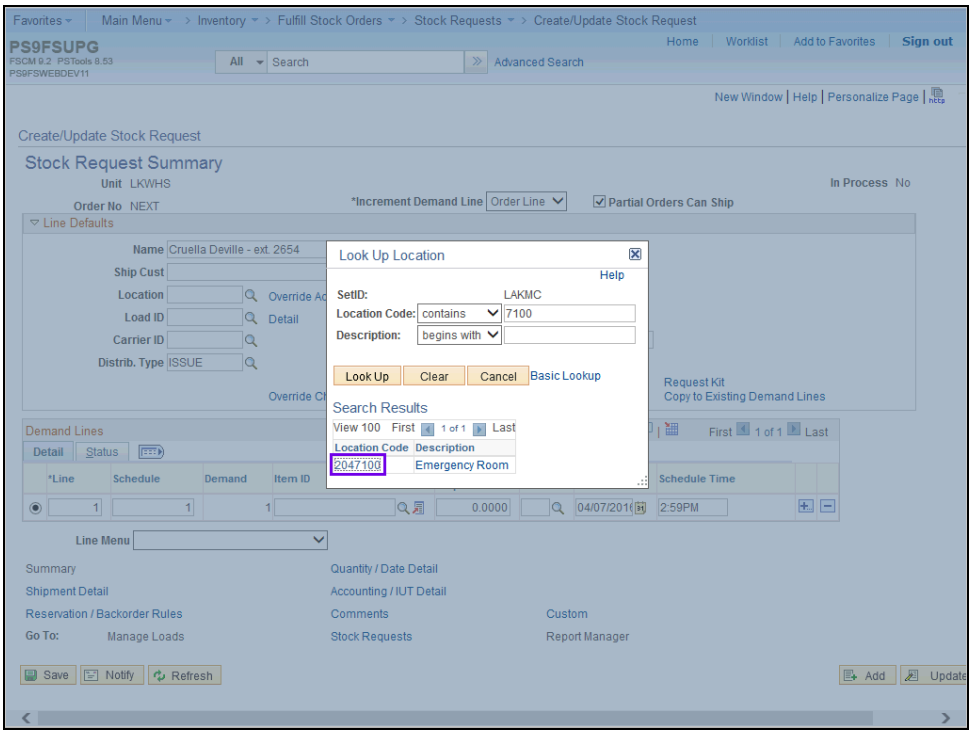
Step	Action
7.	***NOTE: The Order No. field defaults as NEXT and must remain as defaulted. Changing this field to anything other than NEXT will cause errors.*** Request Type field defaults as Internal Issue and will remain as defaulted.
8.	Click the **Add** button. Add
9.	The Name field is a required field and is not case sensitive. ***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 will know whom to contact. Enter the desired information into the **Name** field. Enter "**Cruella Deville - ext. 2654**".



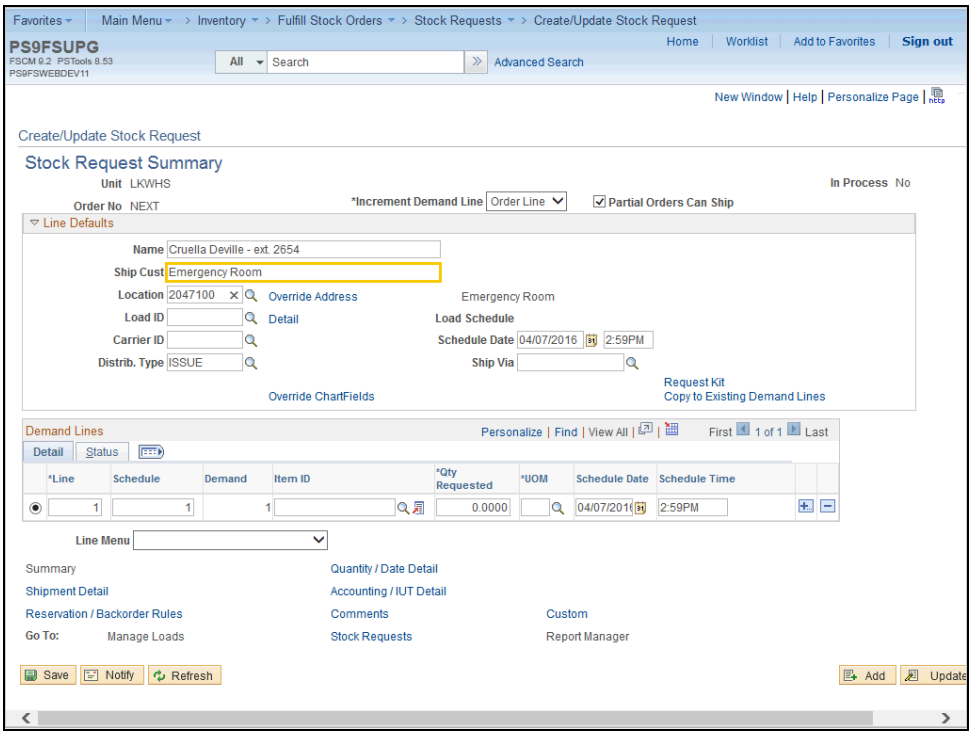
Step	Action
10.	The Location field is a required field. You will search for or enter your seven-digit Department ID in the Location field. The Location is the department requesting the item and where the item(s) will be charged.
11.	All Department ID numbers begin with "**20**". Any department number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



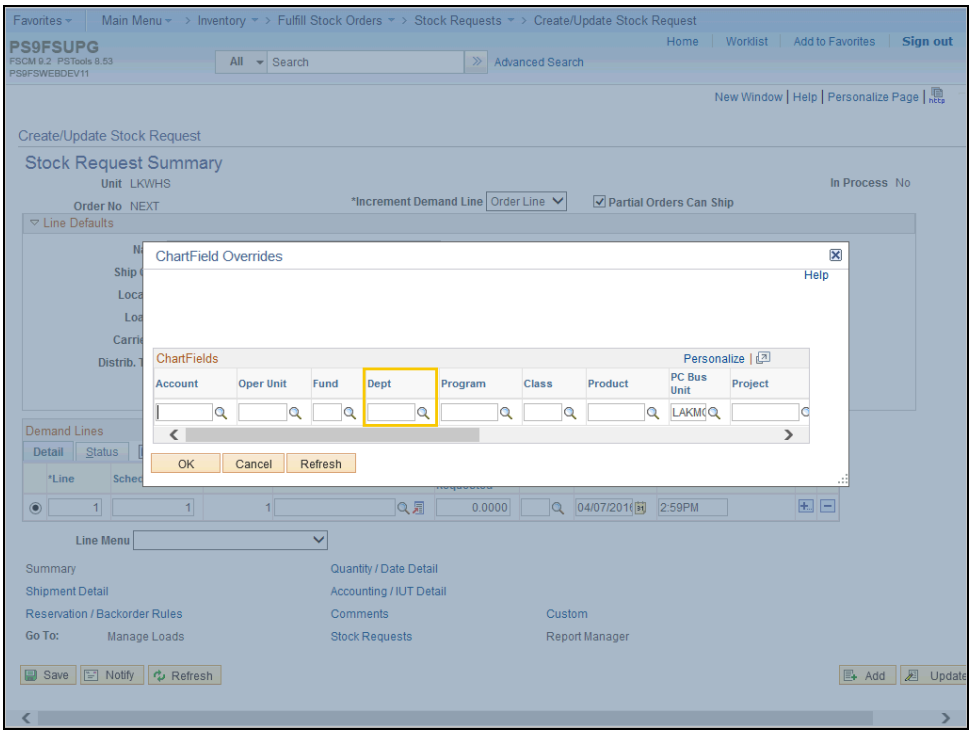
Step	Action
13.	If you know the last four (4) digits of the department number, you can utilize the wildcard for your search. The % sign is the wildcard and takes the place of unknown numbers or letters. The % sign **must** be entered in front of the last four (4) digits of your department ID (e.g. %7100) 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 **Location Code** field.
16.	Click the **contains** list item. contains
17.	Enter the desired information into the **Location Code** field. Enter "**7100**".
18.	Click the **Look Up** button. Look Up



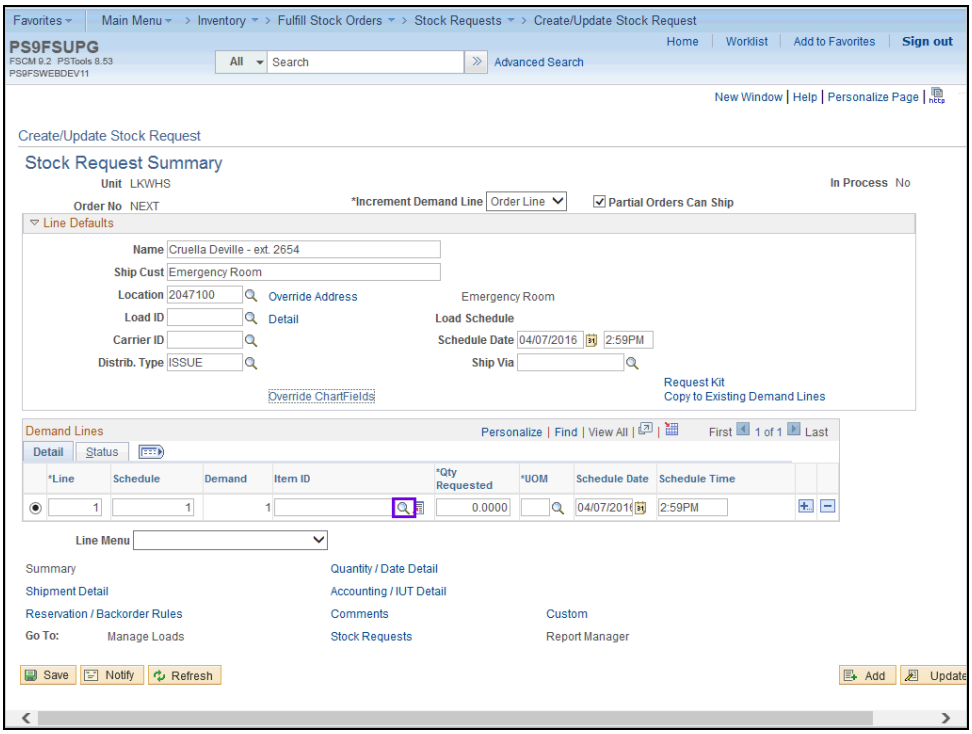
Step	Action
19.	Click the **2047100** link.

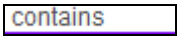
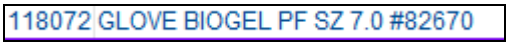


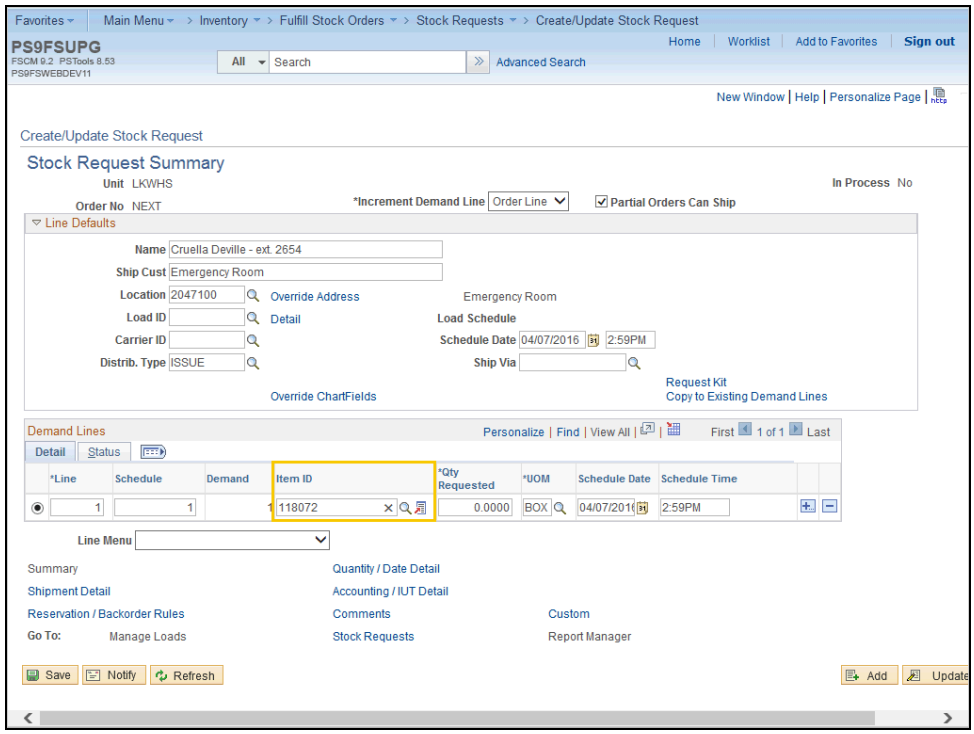
Step	Action
20.	The Ship Cust defaults once the Location is entered.
21.	Click the **Override ChartFields** link. Override ChartFields



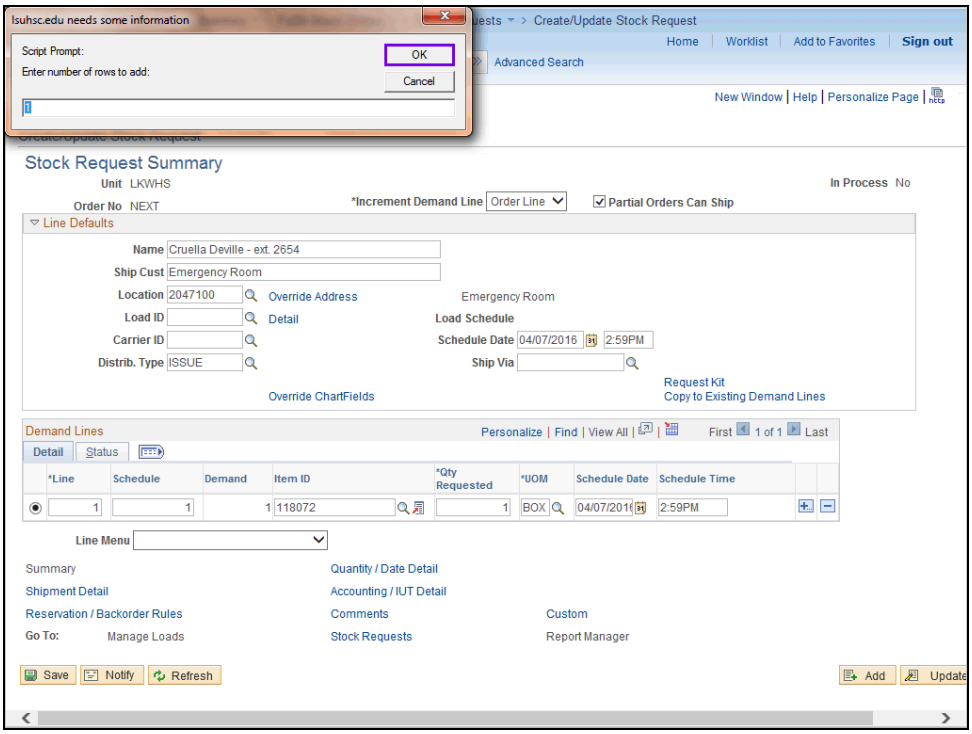
Step	Action
22.	You will enter your seven digit department number into the Dept field. This is the same number as you entered for the Location. ***NOTE: The Dept must be entered prior to entering Item Information. Failure to do so in the Chartfield Override will require the user to enter the department 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 **Dept** field. Enter "**2047100**". ***NOTE: The Dept is the only information you need to enter on the ChartField Overrides page.***
24.	Click the **OK** button. OK



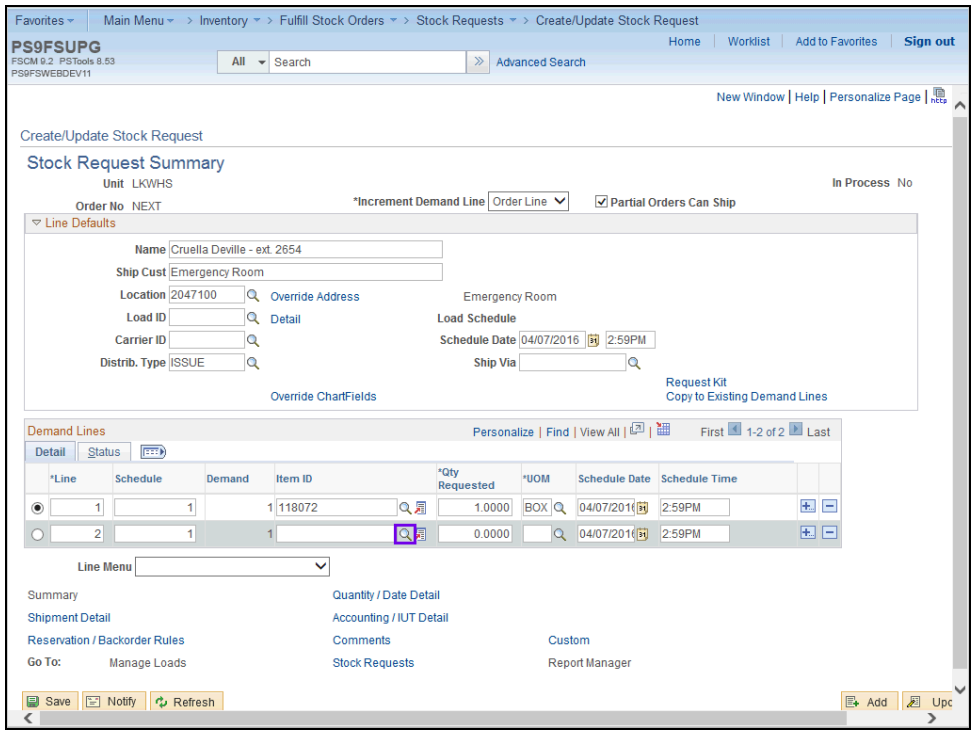
Step	Action
25.	Click the **Look up Item ID** button.
26.	You can search by any of the listed criteria. When searching for medical products using the Description, you may also use the catalog number associated with the item. Catalog numbers are usually found at the end of the item description. You will need to place a wildcard (%) in front of the catalog number to obtain the desired results (e.g. %1883). Searching using the Description field is demonstrated in the following example.
27.	Click the button to the right of the **Description** field.
28.	Click the **contains** list item. 
29.	Enter the desired information into the **Description** 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 **118072 - GLOVE BIOGEL PF SZ 7.0 #82670** link. 

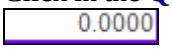
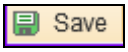


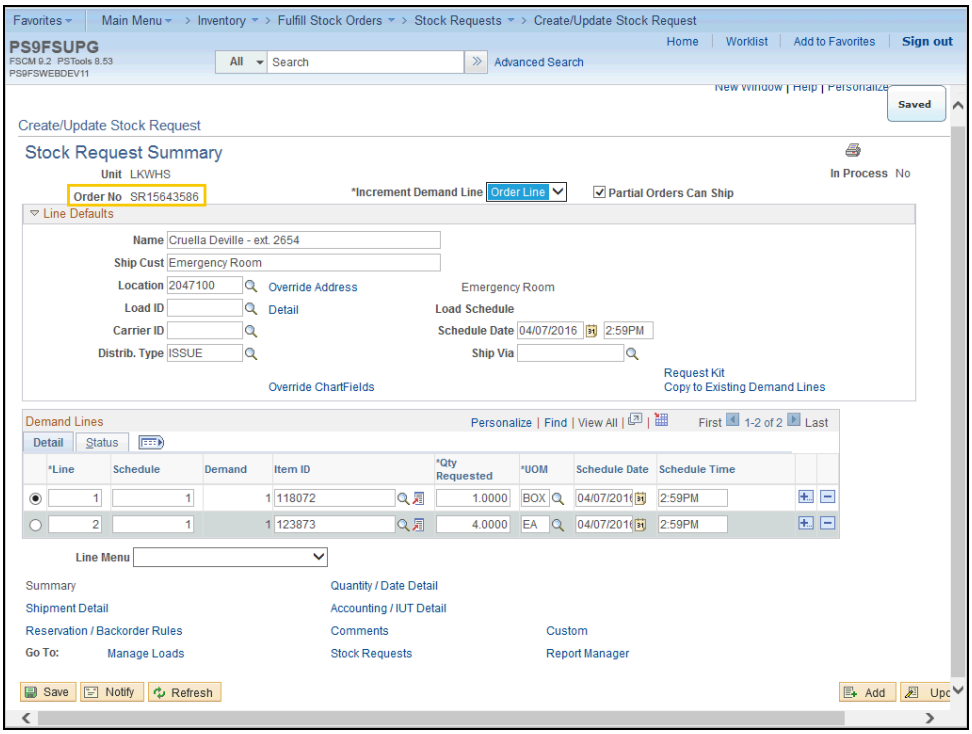
Step	Action
32.	Even though you clicked on the Description, the Item ID number defaults into the Item ID field.
33.	***NOTE: The UOM defaults onto the page once the item is selected. The UOM cannot be changed.***
34.	Click in the **Qty Requested** field. 0.0000
35.	***NOTE: Remove all zeros from the field before entering the quantity to prevent input errors from occurring.*** Click the **X** object to remove the zeroes and decimal point from the field.
36.	Enter the desired information into the **Qty Requested** field. Enter "**1**". ***NOTE: You do not need to enter the decimal or trailing zeros.***
37.	Additional lines can be added to the page if you are requesting multiple items. ***NOTE: Do not save 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.



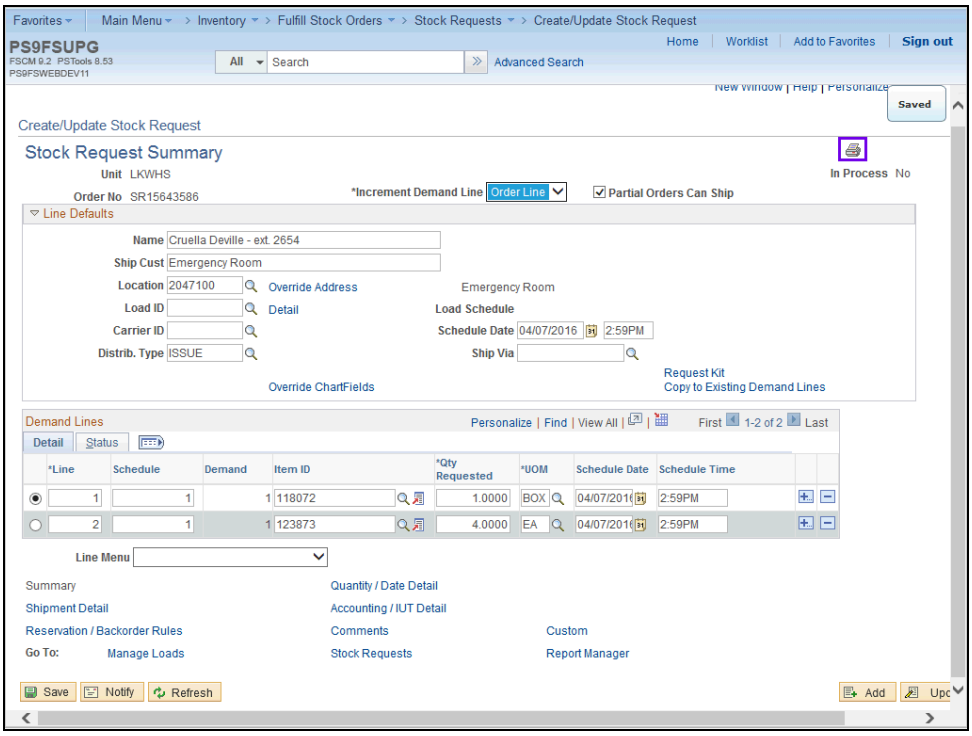
Step	Action
38.	A prompt box displays. Enter the number of rows you wish to add; the system defaults to 1. ***NOTE: Blank rows cannot be saved, so only add the number of rows needed.*** Click the **OK** button. OK



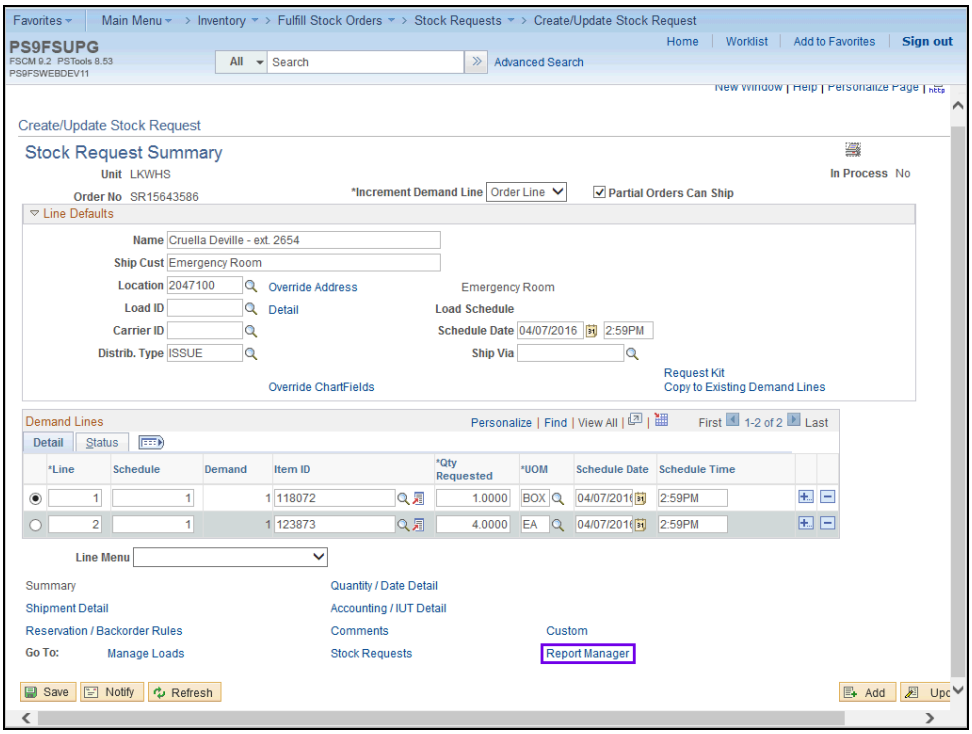
Step	Action
39.	Click the **Line 2 Look up Item ID** button.
40.	Enter the desired information into the **Description** field. Enter "**BATTERY**".
41.	Click the **Look Up** button.
42.	Click the **123873 - BATTERY AA ALKALINE** link.
43.	Click in the **Qty Requested** field. 
44.	Click the **X** object.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



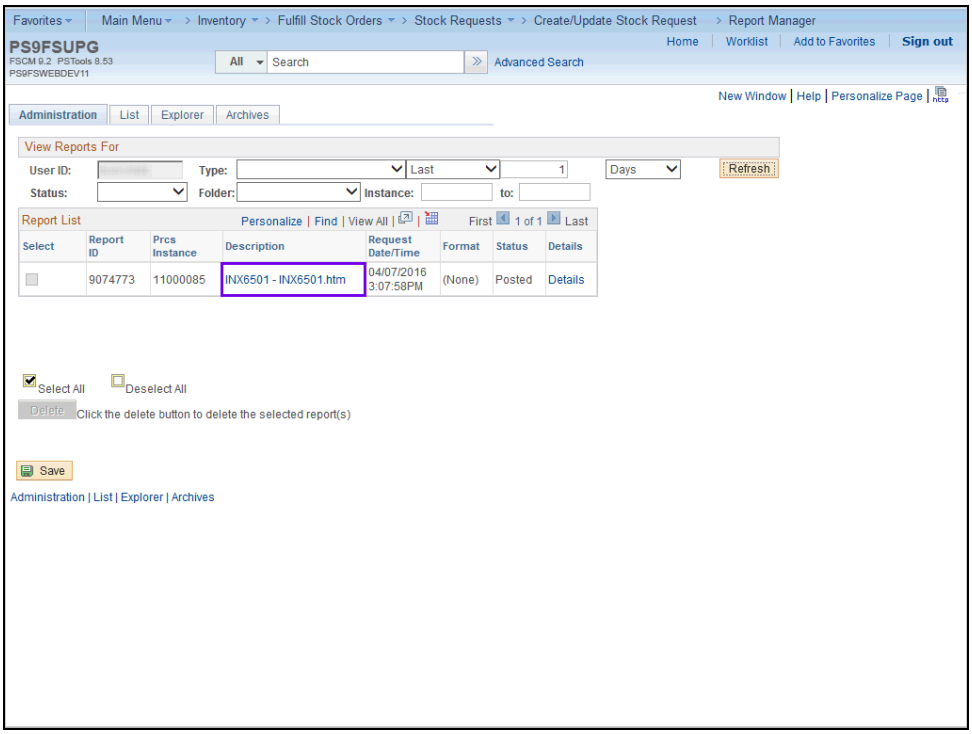
Step	Action
47.	Once saved, the Order No. changes from NEXT to the Order No:. All order numbers begin with SR followed by a seven (7) digit number.



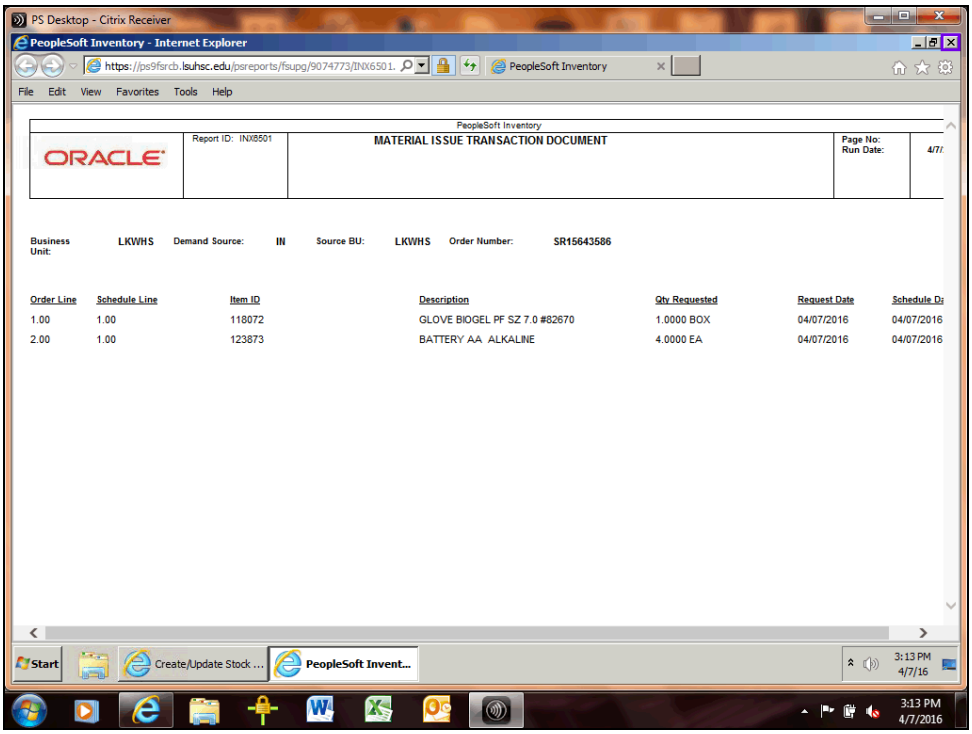
Step	Action
48.	Click the **Printer** button to begin the print process.



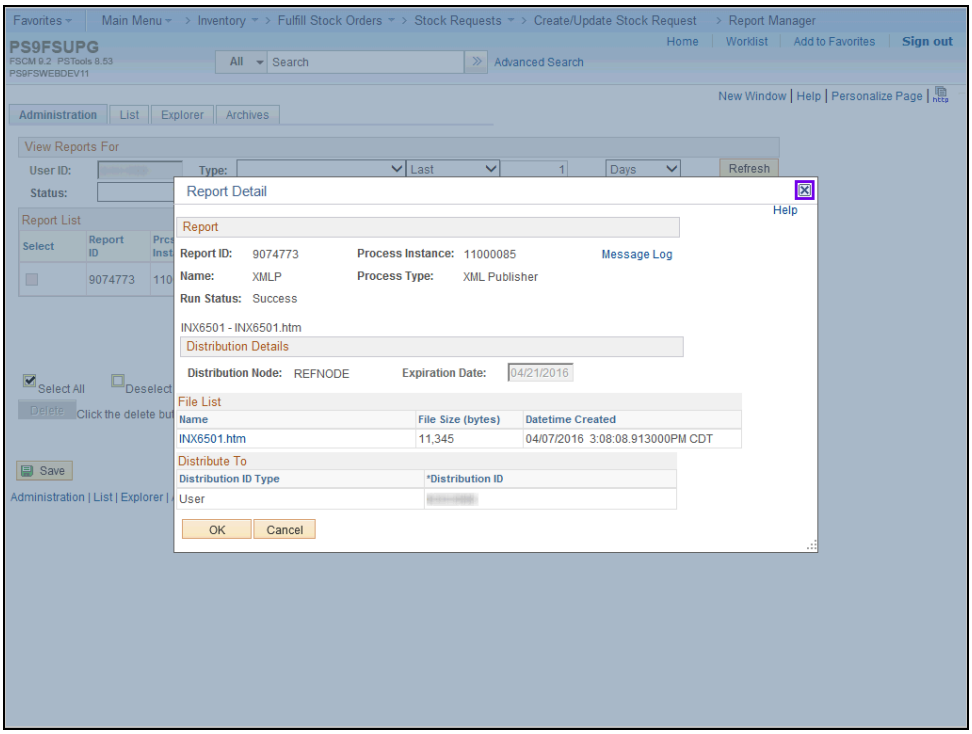
Step	Action
49.	Click the **Report Manager** link located at the bottom of the page. ***NOTE: When prompted with the message that there is unsaved data on the page, you may either select OK to re-save the document, or Cancel to continue. Since there was no change to the document, click Cancel.*** Report 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 **Cancel** button. Cancel
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 **Refresh** button until the **Status = Posted** and **INX6501 - INX6501.htm** becomes a blue link.



Step	Action
52.	Click the **INX6501 - INX6501.htm** link to view and print your stock request. INX6501 - INX6501.htm
53.	Click the **INX6501.htm** link. INX6501.htm



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



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