

Steps to process a Material Request:

CREATE MATERIAL REQUEST

Path: Work Management->Material Request

Create New Record




Complete the required fields and any additional information, then click the Plus sign to add Line Items

Material Request								View: Select			
Transaction	1003		Editor	ROOT		Status	OPEN				
			Edit Date	Jun 19, 2007							
Description	Materials for Plant Sciences Plumbing WO										
						Total	\$0.00				
Work Order			Requestor			Location					
Work Order	001481		Requested By	SCARGW00		Region	ALBANY				
	TESTING WO FOR PLANT SCIENCES -			GUY SCARPELLI			ALBANY COUNTY				
Phase	001		Date Needed	22 Jun 2007		Facility	UW_WEST				
	TESTING WO FOR PLANT SCIENCES -		Deliver To				UW WEST CAMPUS				
						Property	000036				
						Location	SERVICE BUILDING				
Line Items											
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status			

Choose the type of material requested; most often "Add Stock Part by Warehouse", click Done

Add New Line Item			
Line Item Type			
Please Select:			
<input type="radio"/>	Browse Catalogs		
<input type="radio"/>	Add Stock Part by Warehouse		
<input type="radio"/>	Add Catalog Part by Vendor		
<input type="radio"/>	Add NonStock Part		
<input type="radio"/>	Add Equipment Rental		





Choose a Part, and the following fields will be automatically completed after clicking the Zoom saucer:
Description, Warehouse, & Commodity. Enter a Quantity, click Done or click the Plus sign to add another Line Item

Line Item View:   

Line	1	Editor	ROOT	Status	<input type="text" value="Open"/>
		Edit Date	Jun 19, 2007		
Description	<input type="text" value="COUPLING BRASS 1/2 IN"/>			Line Type	<input type="text" value="Stock"/>

Part		Totals	
Warehouse	<input type="text" value="MAIN"/>	Quantity	<input type="text" value="5"/>
Part	<input type="text" value="PBR0010"/>	Unit Cost	\$4.99
	COUPLING BRASS 1/2 IN		
Class	659	Total	\$0.00
Commodity	<input type="text" value="33"/>		
Vendor UOM	EACH		

If the part number is unknown, click the Zoom saucer next to Part to bring up the search screen. Click the Search magnifying glass

Inventory Part    

Part	Description
ALU0005	ROD ALUMINUM EXTRUDED ROUND 1/4 IN
ALU0015	ROD ALUMINUM EXTRUDED ROUND 1/2 IN
ALU0025	ROD ALUMINUM EXTRUDED ROUND 1 IN
ALU0100	TUBING ROUND ALUMINUM 3/4 IN OD
ALU0105	TUBING ROUND ALUMINUM SEAMLESS EXTRUDED 1 IN
ALU0110	TUBING ROUND ALUMINUM SEAMLESS EXTRUDED 1 1/4 IN X .083 IN
ALU0200	ANGLE ALUMINUM EXTRUDED 1/8 IN X 1 IN X 1 IN
ALU0205	ANGLE ALUMINUM 1/8 IN X 1 1/4 IN X 1 1/4 IN
ALU0210	ANGLE ALUMINUM EXTRUDED 1/8 IN X 1 1/2 IN X 1 1/2 IN
ALU0215	ANGLE ALUMINUM EXTRUDED 1/8 IN X 2 IN X 2 IN

In the Search screen, select “contains” from the dropdown next to Description. Enter the search criteria.

Inventory Part Profile

Part	=	
Description	=	
Class	>	
Commodity	>=	
Inventory Item	<=	
Type	starts with	
Kitted Part	end with	
UOM	contains	No
	null	
	not null	
	in	
	not in	

Execute the search

Inventory Part Profile

Part	=	
Description	contains	battery
Class	=	
Commodity	=	
Inventory Item	=	
Type	=	
Kitted Part	=	No
UOM	=	

Choose the part from the search results. Use the navigation arrows at the bottom to view additional pages of search results

Inventory Part



Part	Description
EBT0005	BATTERY D CELL ALKALINE
EBT0010	BATTERY C CELL ALKALINE
EBT0015	BATTERY AA CELL ALKALINE
EBT0020	BATTERY AAA CELL ALKALINE
EBT0025	BATTERY 9 VOLT ALKALINE DURACELL
EBT0030	BATTERY SIZE N
EBT0035	BATTERY PHOTO/ELECTRONIC 1.5V
EBT0090	BATTERY 6 VOLT SPRING TERMINAL HEAVY DUTY
EBT0095	BATTERY 6 VOLT HEAVY DUTY SCREW TERMINAL
EBT0120	BATTERY 12V 7 AMP HOUR POWERSONIC PS-1270F1

Change the status to FINALIZED, click Save. Click the Print button to print the record.

Module Work Management Setup					
Material Request			View: <input type="text" value="Select"/>		
Transaction	1002	Editor	WYOGIN	Status	FINALIZED
		Edit Date	Jun 20, 2007		

The preview screen will appear, click Print to view it as a PDF

BIRT Report Viewer



Showing page 1 of 1

Material Request		1002			
		Edit Date	Jun 20, 2007 9:38 AM	Status	FINALIZED
		Edit Clerk	WYOGIN	Region	ALBANY
Work Order	001349	Requested By		Facility	UW_WEST
Phase	001	Date Needed	Jun 26, 2007 9:33 AM	Property	000002
				Location	

TEST MAT REQ B200 FOR WYOGIN

Line		1			
		Edit Date	Jun 20, 2007 9:38 AM	Status	OPEN
		Edit Clerk	WYOGIN	Line Type	STOCK
Warehouse	MAIN				
Part	EBT0015				
UOM	EACH	Cost	.3	Quantity	12
Commodity	06				
BATTERY AA CELL ALKALINE					

Line		2			
		Edit Date	Jun 20, 2007 9:38 AM	Status	OPEN
		Edit Clerk	WYOGIN	Line Type	STOCK
Warehouse	MAIN				
Part	EBT0025				
UOM	EACH	Cost	1.18	Quantity	6
Commodity	06				
BATTERY 9 VOLT ALKALINE DURACELL					

Click the Print button on the PDF to bring up the standard Windows Print dialog to choose the destination printer.



Material Request 1002

Work Order	001349	Edit Date	Jun 20, 2007 9:38 AM	Status	FINALIZED
Phase	001	Edit Clerk	WYOGIN	Region	ALBANY
		Requested By		Facility	UW_WEST
		Date Needed	Jun 26, 2007 9:33 AM	Property	000002
				Location	

TEST MAT REQ B200 FOR WYOGIN

Line 1

Warehouse	MAIN	Edit Date	Jun 20, 2007 9:38 AM	Status	OPEN
Part	EBT0015	Edit Clerk	WYOGIN	Line Type	STOCK
UOM	EACH	Cost	.3	Quantity	12
Commodity	06				
BATTERY AA CELL ALKALINE					

Line 2

Warehouse	MAIN	Edit Date	Jun 20, 2007 9:38 AM	Status	OPEN
Part	EBT0025	Edit Clerk	WYOGIN	Line Type	STOCK
UOM	EACH	Cost	1.18	Quantity	6
Commodity	06				
BATTERY 9 VOLT ALKALINE DURACELL					

CREATE PICK TICKET

Path:Inventory->Pick Ticket

Create New record

Enter Warehouse MAIN, Work Order # and Phase #, click Load Material Request

Module **Inventory** Setup

Pick Ticket

View: Select

Transaction	1003	Editor	ROOT	Status	OPEN
		Edit Date	Jun 19, 2007	Warehouse	MAIN
Description					CENTRAL STORE MAIN
				Date Needed	
				Time Needed	

Work Order	Location
Work Order	Region
001481	ALBANY
TESTING WO FOR PLANT	ALBANY COUNTY
Phase	Facility
001	UW_WEST
TESTING WO FOR PLANT	UW WEST CAMPUS
	Property
	000002
	AGRICULTURE C
	Location

Line Items Load Material Request

Line	Part	Description	UOM	Bin	Requested Quantity	Unit Cost	Status
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Select the Line Items to add to Pick Ticket individually, or Select All, click Done

Module **Inventory** Setup

Add New Line Item

Select All

Load Material Request								
	Transaction	Line	Warehouse	Work Order	Phase	Part	Quantity	Status
<input checked="" type="checkbox"/>	1003	1	MAIN	001481	001	PBR0010	5.0000	Open
<input checked="" type="checkbox"/>	1003	2	MAIN	001481	001	PBL0495	2.0000	Open

Change the Pick Ticket Status to Finalized, click Save.

Module ▾ Inventory ▾ Setup ▾

Pick Ticket

View: Select ▾

Transaction	1003	Editor	ROOT	Status	FINALIZED
		Edit Date	Jun 19, 2007	Warehouse	MAIN
Description					CENTRAL STORE MAIN
				Date Needed	22 Jun 2007
				Time Needed	12 : 10 PM

Work Order		Location	
Work Order	001481	Region	ALBANY
			ALBANY COUNTY
Phase	001	Facility	UW_WEST
			UW WEST CAMPUS
		Property	000002
			AGRICULTURE C
		Location	

Line Items [Load Material Request](#) + -

Line	Part	Description	UOM	Bin	Requested Quantity	Unit Cost	Status
<input type="checkbox"/> 1	PBL0495	ELL BLACK 90 1 IN STD MALLEABLE IRON	EACH	SF101802D1	2.00	\$1.28	Open
<input type="checkbox"/> 2	PBR0010	COUPLING BRASS 1/2 IN	EACH	SF101703E2	5.00	\$4.99	Open

Click the print button to print the record

Module ▾ Inventory ▾ Setup ▾

Pick Ticket


View: Select ▾

Transaction	1001	Editor	AFOCA	Status	FINALIZED
		Edit Date	Jun 20, 2007	Warehouse	MAIN
Description					CENTRAL STORE MAIN

The preview screen will appear, click Print to view it as a PDF


BIRT Report Viewer

Showing page 1 of 1 Go to page:

DESCRIPTION		1001			
 ★ 1 0 0 1 ★					
Work Request	001349	Phase	001	Status	FINALIZED
Warehouse	MAIN	Created By	AFOCA		
Date Needed	Jun 26, 2007 9:33 AM				
Ship To					
Region Code	ALBANY	Property	000002		
Facility ID	UW_WEST	Location Code			
Item	Part	Bin Location	Quantity	Rel Qty	Line Item Status
1	EBT0015	SCG0301B1	12	0	OPEN
BATTERY AA CELL ALKALINE					
2	EBT0025	SCG0301C1	6	0	OPEN
BATTERY 9 VOLT ALKALINE DURACELL					
Jun 20, 2007 10:05 AM					

Click the Print button on the PDF to bring up the standard Windows Print dialog to choose the destination printer.

1 / 1 103% Find

DESCRIPTION		1001			
 ★ 1 0 0 1 ★					
Work Request	001349	Phase	001	Status	FINALIZED
Warehouse	MAIN	Created By	AFOCA		
Date Needed	Jun 26, 2007 9:33 AM				
Ship To					
Region Code	ALBANY	Property	000002		
Facility ID	UW_WEST	Location Code			
Item	Part	Bin Location	Quantity	Rel Qty	Line Item Status
1	EBT0015	SCG0301B1	12	0	OPEN
BATTERY AA CELL ALKALINE					
2	EBT0025	SCG0301C1	6	0	OPEN
BATTERY 9 VOLT ALKALINE DURACELL					

CREATE COUNTER RELEASE



Path:Inventory->Counter Release


Create New Record

Enter the Warehouse MAIN, click Load Pick Tickets


Module **Inventory** Setup


Counter Release



View: Select  

Transaction	1003	Editor	ROOT	Reference	<input type="text"/>	
		Edit Date	Jun 19, 2007	Warehouse	MAIN 	
Description	<input type="text"/>				Total Cost	\$0.00

Release Persons

Released By 

Released To 



Line Items [Load Pick Tickets](#)  

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
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Select the Transactions to add to the Counter Release individually, or Select All, click Done, click Save

Module **Inventory** Setup

Load Pick Tickets

Select All  

Load Pick Tickets								
	Transaction	Line	Work Order	Phase	Part	Bin	Requested Quantity	Released Quantity
<input checked="" type="checkbox"/>	1003	1	001481	001	PBL0495	SF101802D1	2.0000	0.0000
<input checked="" type="checkbox"/>	1003	2	001481	001	PBR0010	SF101703E2	5.0000	0.0000

CREATE COUNTER RETURN

Path:Inventory->Counter Return