



ORDERING FROM THE CENTRAL WAREHOUSE

An excerpt from Portland Public Schools PeopleSoft Quick Reference Guide on entering Material Stock Requests (MSR's):

The **Create/Update Stock Request** pages allow schools and departments to enter inventory item requests directly into PeopleSoft. After the MSR is entered it will be saved and stored in the system. It can be edited and resaved, until it is either canceled, or approved. Once approved, it will be picked up by system processes and printed in the Warehouse for picking and delivery.

Log in	Log into PeopleSoft 9.0: Enter Employee ID# starting with E00 Enter Password	User ID: <input type="text" value="E00###"/> Password: <input type="password" value="****"/> <input type="button" value="Sign In"/>										
	Click on Sign In .	<input type="button" value="Sign In"/>										
MSR Entry Step 1	Navigate to the Express Issue Add Page: Inventory>Fulfill Stock Orders>Stock Requests>Create/Update Stock Request.											
Step 2	In the Create/Update Stock Request search page, select the Add a New Value tab. Leave the default values in and select Add .	<input type="button" value="Add a New Value"/> <input type="button" value="Add"/>										
Step 3	At the Stock Request Summary page, first enter info in the Line Defaults section in this order: 1) Name: 2) Location: 3) Ship Cust:	PPS Shopper x1234 <input type="text" value="ABERNETHY"/> <input type="button" value="Q"/> <input type="text" value="Abernethy School"/>										
Step 4	Select the Override ChartFields link.	Override ChartFields										
Step 5	Enter your school's or department's ChartFields and select OK : <table border="1" data-bbox="370 1453 976 1506"> <thead> <tr> <th>Account</th> <th>Fund</th> <th>DeptID</th> <th>Program</th> <th>Class</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="541000"/> <input type="button" value="Q"/></td> <td><input type="text" value="101"/> <input type="button" value="Q"/></td> <td><input type="text" value="1131"/> <input type="button" value="Q"/></td> <td><input type="text" value="11113"/> <input type="button" value="Q"/></td> <td><input type="text" value="05000"/> <input type="button" value="Q"/></td> </tr> </tbody> </table>	Account	Fund	DeptID	Program	Class	<input type="text" value="541000"/> <input type="button" value="Q"/>	<input type="text" value="101"/> <input type="button" value="Q"/>	<input type="text" value="1131"/> <input type="button" value="Q"/>	<input type="text" value="11113"/> <input type="button" value="Q"/>	<input type="text" value="05000"/> <input type="button" value="Q"/>	<input type="button" value="OK"/>
Account	Fund	DeptID	Program	Class								
<input type="text" value="541000"/> <input type="button" value="Q"/>	<input type="text" value="101"/> <input type="button" value="Q"/>	<input type="text" value="1131"/> <input type="button" value="Q"/>	<input type="text" value="11113"/> <input type="button" value="Q"/>	<input type="text" value="05000"/> <input type="button" value="Q"/>								
Step 6	In the Demand Lines section enter: Item ID: Qty Requested: UOM:	<input type="text" value="72-0910"/> <input type="text" value="2.0000"/> <input type="text" value="EA"/>										
Step 7	Add more Demand Lines by selecting the "Add Multiple New Rows" button.	<input type="button" value="+"/>										
Step 8	In Script Prompt box, enter number of lines to add. Select OK.	<input type="text" value="3"/> <input type="button" value="OK"/>										

Step 9	Click in or tab to Item ID and Qty Requested fields and enter values until order is complete.	<table border="1"> <tr><td>64-7500</td><td>2.0000</td><td>CS</td></tr> <tr><td>46-0914</td><td>2.0000</td><td>FT</td></tr> <tr><td>63-0360</td><td>2.0000</td><td>EA</td></tr> </table>	64-7500	2.0000	CS	46-0914	2.0000	FT	63-0360	2.0000	EA	
64-7500	2.0000	CS										
46-0914	2.0000	FT										
63-0360	2.0000	EA										
Step 10	Check stock availability: See *IMPORTANT REMINDER* on page 11 .											
Optional: Editing Chartfield	Step A: Enter different a ChartField for line 4 (example) by selecting the Accounting/IUT Detail link with cursor in line 4.	Accounting / IUT Detail										
	Step B: Select the Override ChartFields link.	Override ChartFields										
	Step C: Enter new ChartFields: <table border="1"> <thead> <tr><th>Account</th><th>Fund</th><th>DeptID</th><th>Program</th><th>Class</th></tr> </thead> <tbody> <tr><td>541000</td><td>101</td><td>3120</td><td>11313</td><td>05000</td></tr> </tbody> </table>	Account	Fund	DeptID	Program	Class	541000	101	3120	11313	05000	
Account	Fund	DeptID	Program	Class								
541000	101	3120	11313	05000								
	Step D: Select OK . Select Stock Request Summary link.	<p>OK</p> Stock Request Summary										
Step 11	Select Save .											
Step 12	Record MSR# on MSR form if entering from one. Write it down! Don't forget it!	Order No: MSR0032174										
MSR Approval Step 13	From Menu on left of screen, select Approve Stock Request .	Approve Stock Request										
Step 14	In the Stock Request Approval search page, the MSR# should have defaulted in. Select Search .	MSR0032174 <input type="button" value="Search"/>										
Step 15	At top of Approval page, the Approval Action defaults to Approve .	Approval Action Approve										
Step 16	Review info and select Save to approve. Approval Status in middle right of Order Details will change from Pending to Approved when saved, or route MSR to budget holder for approval.	 Approval Status Approved										
	MSR will be picked up by the Autoship scheduled job when approved and print up at the warehouse office.											

OUT OF STOCK NOTIFICATION

You will receive an email notification when an item is out of stock. Sample emails:

- **Discontinued Warehouse Inventory Item Status**

In reference to your order MSR0076646, **The following item(s) are no longer stocked!**

SRC BU	NAME	LOCATION	ORDER NO	ITEM	DESCRIPTION	QTY REQ	REQUESTED DATE	CANCELLED DATE
PPS1J	Gray,Dawn M	ATKINSON	MSR0076646	64- 6240	TAGBOARD, MANILA	250	01/14/10	01/15/10

Please refer to the 2009-2010 Warehouse Catalog to find the stock number of recommended replacements that you may order from **Office Depot**.

If you have questions, contact the warehouse team at 503-916-3245.

Your PPS Warehouse Team

- **Warehouse Inventory Item Status**

In reference to your order MSR0076363, the following item(s) are out of stock. **Any backorders have been cancelled!**

SRC BU	NAME	LOCATION	ORDER NO	ITEM	DESCRIPTION	QTY REQ	REQUESTED DATE	CANCELLED DATE
PPS1J	Arena,Barbara	PARRY CTR	MSR0076363	63- 1920	FOLDER LETTER SIZE MANILA	2	01/07/10	01/11/10

We do not have an estimated date that the item(s) will be replenished. When the item(s) are available, you can resubmit a stock request.

If you have questions, contact the warehouse team at 503-916-3245.

Your PPS Warehouse Team

INSTRUCTIONS ON FORCING CHARTFIELD DATA THROUGH MSR LINES

When you forget to enter the chartfield until after one or more lines have been entered, you will need to select the "**Override Chartfields**" link in the **Line Defaults** section, enter the chartfield just as you would have to begin with:



Line Defaults

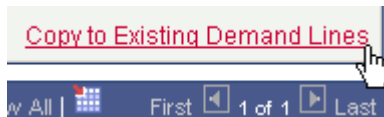
Name:

Ship Cust:

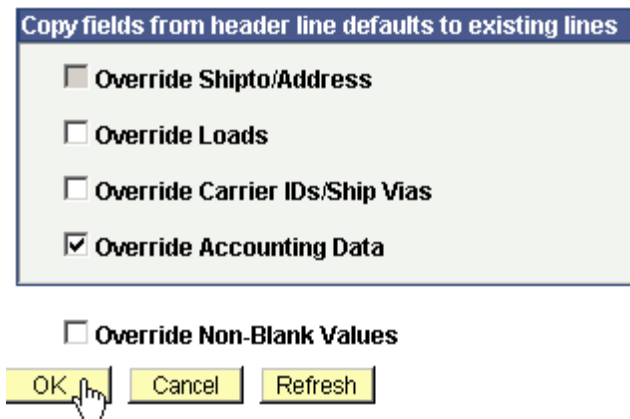
Location: 

[Override ChartFields](#) [Copy to Existing Demand Lines](#)

Select "**OK**", and then select the "**Copy to Existing Demand Lines**" link to the right of the "**Override Chartfields**" link:



Select "**Override Accounting Data**", then "**Ok**" to force the Chartfield through the lines you've already created:



Copy fields from header line defaults to existing lines

Override Shipto/Address

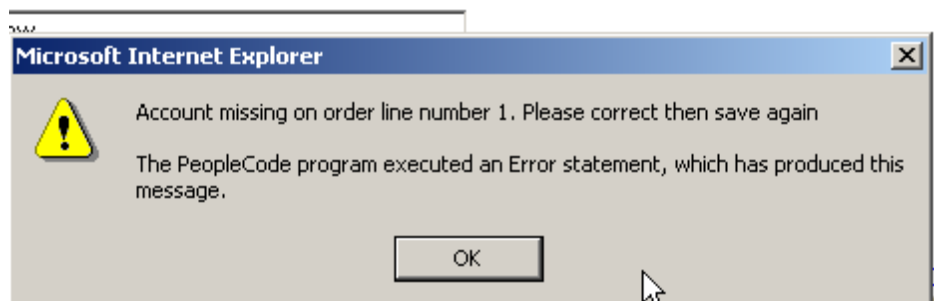
Override Loads

Override Carrier IDs/Ship Vias

Override Accounting Data

Override Non-Blank Values

If you are going through these steps because you received an error message such as:



Select both the "Override Accounting Data" line and the "Override Non-blank Values" line:

Copy fields from header line defaults to existing lines

Override Shipto/Address

Override Loads

Override Carrier IDs/Ship Vias

Override Accounting Data

Override Non-Blank Values

OK Cancel Refresh

Then select "OK" to force the Chartfield through the MSR lines.

You should then be able to select the "Save" button to save your MSR without the Error message interfering:

Stock Request Summary [Quantity / Date Detail](#)

Save Notify Refresh

*****IMPORTANT REMINDER*****

- You can check quantity available to promise, (on hand), in the warehouse for each item you wish to order on an MSR.

1. Select the line item

Demand Lines Customize | Find | View All

Detail Status EEB

'Line	Schedule	Demand	Item ID	Description	'Qty Requested	'UOM	Schedule
1	1	1	64-7600	RECYCLED COPY PAPER /100%	20.0000	CS	01/08/2
2	1	1	63-0175	3 IN RING BINDER/WHITE /VIEW	100.0000	EA	01/08/2

Line Menu: ▼

Summary [Available to Promise...](#) [Accounting / IUT Detail](#) [Reservation / Backorder Rules](#) [Comments](#) [Custom](#)

Go To: [Manager](#) [Update Kit Quantity...](#)

[Return to Fulfill Stock Orders](#)

2. Click on Line Menu

3. Select Available to Promise