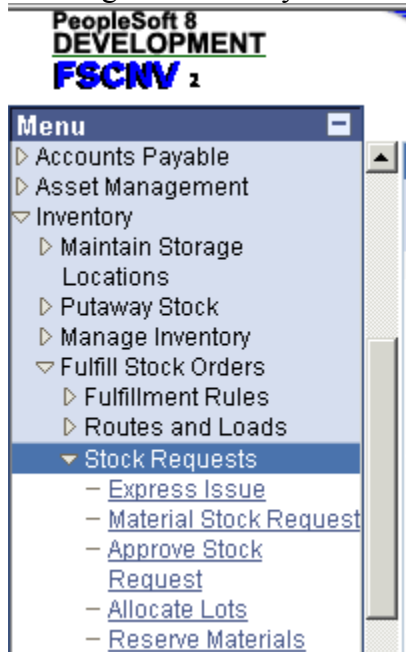


## How to Enter a Material Stock Request (MSR) in PeopleSoft

The end-user will perform the steps below to order stock items from the Warehouse in PeopleSoft. Ordering of items is only accomplished in the Financials Production Database (PSFSPRD).

### 1. Navigate: Inventory – Fulfill Stock Orders – Stock Requests – Material Stock Requests



### 2. Select Add a New Value

In the dialog box, enter the Inventory Business Unit from which the item is being ordered:

Leave the Order Number as the default NEXT.

Leave the Request Type as the default Internal Issue.

Click Add.

**Material Stock Request**

[Find an Existing Value](#) **Add a New Value**

**Business Unit:**

**Order No:**

**Request Type:**

[Find an Existing Value](#) | [Add a New Value](#)

## How to Enter a Material Stock Request (MSR) in PeopleSoft

3. Enter the following VERY IMPORTANT information:

Name box - Department Name - Name of Requester.

Location – Department ID

Click on Override Chartfields located next to Distribution Type field.

**Stock Request Summary**

Unit: HPWHS

Order No: NEXT    \*Increment Demand Line: Order Line     Partial Orders Can Ship    Report Manager

**Line Defaults**

Name: [Redacted]  
Ship Cust: [Redacted]  
Location: [Redacted]    [Override Address](#)  
Load ID: [Redacted]    [Detail](#)    Load Schedule:  
Carrier ID: [Redacted]    Ship Via: [Redacted]  
Distrib Type: ISSUE    [Override Chartfields](#)    [Copy to Existing Demand Lines](#)

**Demand Lines**

*Line	*Sch Line	*Item ID	*Qty Requested	*UOM	*Schedule Date	Sched Time
1	1.00	[Redacted]	[Redacted]	[Redacted]	02/08/2007	9:32AM

Stock Request Summary    [Quantity / Date Detail](#)    [Shipment Detail](#)    [Accounting / IUT Detail](#)    [Comments](#)    Manage Loads

4. Enter the appropriate information for your department's Dept (Only information entered)

Click OK

**ChartFields**

Account    Oper Unit    Fund    Dept    Program    Class    Product    Project    Affiliate    Fund Affil    Oper Unit Affil

NOTE: If you do not enter the Department prior to entering Item information you must enter the department information on every line of the MSR.

## How to Enter a Material Stock Request (MSR) in PeopleSoft

5. Click in the Item ID box and enter the Item Number which you wish to order.

**Stock Request Summary**

Unit: HPWHS

Order No: NEXT    \*Increment Demand Line: Order Line     Partial Orders Can Ship    Report Manager

**Line Defaults**

Name: [Redacted]  
Ship Cust: [Redacted]  
Location: [Redacted] [Override Address](#)  
Load ID: [Redacted] [Detail](#)    Load Schedule:  
Carrier ID: [Redacted]    Ship Via: [Redacted]  
Distrib Type: ISSUE [Override CharFields](#)    [Copy to Existing Demand Lines](#)



**Demand Lines**    Customize | Find | View All | First 1 of 1 Last

*Line	*Sch Line	*Item ID	*Qty Requested	*UOM	*Schedule Date	Sched Time
1	1.00	[Redacted]	[Redacted]	[Redacted]	02/08/2007	9:32AM

Stock Request Summary    [Quantity / Date Detail](#)    [Shipment Detail](#)    [Accounting / IUT Detail](#)    [Comments](#)    Manage Loads

6. Click in the Qty Requested Field and enter the Quantity Requested. Refresh to populate UOM. **Very Important: Always crosscheck the UOM that displays with what the Business Unit ordered.**

NOTE: There are two new search buttons available to find the correct Item ID – they are located directly after the Item ID box -  


The Magnifying Glass opens the following page – you can search by any or all of the criteria listed (remember that the % is a wildcard when searching)


### Look Up Item ID

Business Unit: HPWHS

Item ID: begins with [Redacted]


Description: begins with [Redacted]

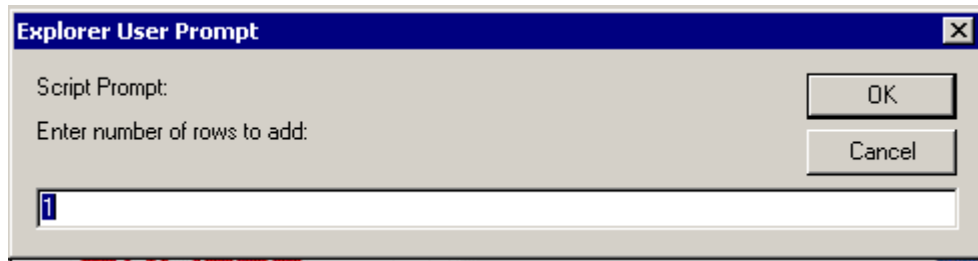
Item Group: begins with [Redacted] 

Family: begins with [Redacted] 

           [Basic Lookup](#)


## How to Enter a Material Stock Request (MSR) in PeopleSoft


7. If there is another item to enter click on the plus sign . A pop-up box will appear



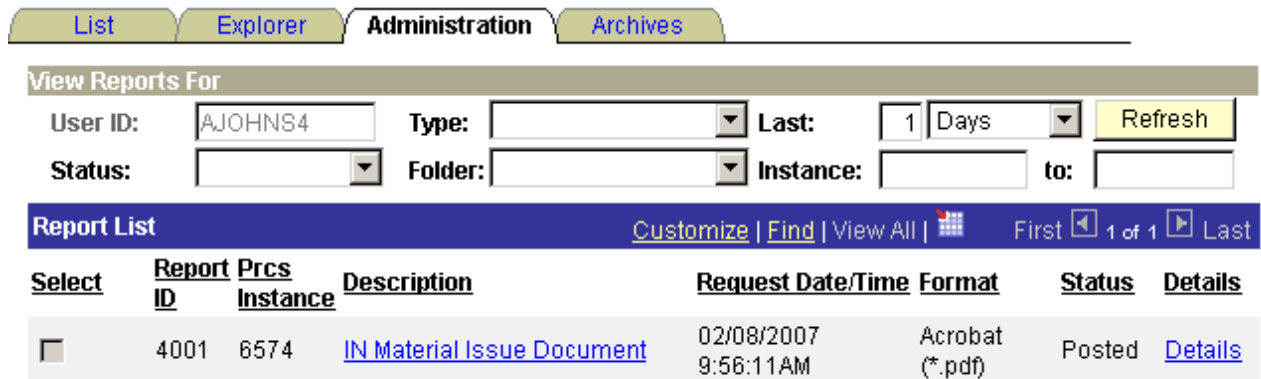
The dialog box is titled "Explorer User Prompt" and has a close button (X) in the top right corner. It contains a "Script Prompt:" label, followed by the text "Enter number of rows to add:". Below this text is a text input field containing the number "1". To the right of the input field are two buttons: "OK" and "Cancel".

Enter the number of rows you want to add. Then enter the information for each additional item using the same steps until all items have been entered.

8. Click on the Save  at the bottom left of the panel to generate an MSR Order Number.


9. Click on Printer Icon at the top right of the page. 

### Go to Report Manager



The Report Manager interface shows a navigation bar with tabs for "List", "Explorer", "Administration", and "Archives". Below the navigation bar is a "View Reports For" section with fields for "User ID:" (AJOHNS4), "Type:", "Last:" (1 Days), "Status:", "Folder:", "Instance:", and "to:". A "Refresh" button is located to the right of the "Last:" field. Below this is a "Report List" section with a table of reports. The table has columns for "Select", "Report ID", "Prce Instance", "Description", "Request Date/Time", "Format", "Status", and "Details". One report is listed: "IN Material Issue Document" with a request date of 02/08/2007 9:56:11AM, format of Acrobat (\*.pdf), and status of Posted. A "Details" link is provided for this report.

### Selected the IN Material Issue Document

**Optional 5B** - After you have input the Item ID and Qty Requested you can select the Available to Promise button  to determine if there is stock available to complete your issue. When you select Available to Promise a second PeopleSoft panel is opened. Your original MSR panel is still active and can be re-selected from your taskbar.

**NOTE** – first time this is done you must allow pop-ups which will reset the MSR and you will lose what you have keyed

When the Item availability panel opens it will have the Item, Unit and Quantity from the line you entered on the EZ Issue.

## How to Enter a Material Stock Request (MSR) in PeopleSoft

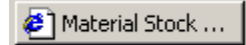
**Item/Product Availability**

\*SetID:  [Search](#)

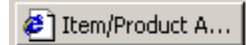
Unit: HPWHS      Starting Qty Available: 2.0000 EA  
Item ID: 100021      Status: Active      Qty Requested: EA  
FOIL ALUMINUM 18"X 500' ROLL      First Available Ship Date:

Summary Information			Customize	Find	View All	First	1 of 1	Last
Available Quantity			Demand and Supply					
Sched Date	Cumulative ATP	Available Qty						
02/08/2007	2.0000	2.0000						

Once you have determined that there is sufficient quantity to complete your issue return to the Material Stock Request Page on your Taskbar



After entering your next item, click on the Item/Product Availability page on your taskbar.



Click on Search

**Item/Product Availability**

\*SetID:  [Search](#)



Unit:

After the search page comes up enter the Item ID for the new line, your Unit and the Qty Requested; then click OK

## How to Enter a Material Stock Request (MSR) in PeopleSoft

### Availability Inquiry Selection

SetID: SHARE

Item ID:   

FOIL ALUMINUM 18'X 500' ROLL

Unit:   Huey P. Long - Warehouse

Qty Requested:  EA

#### Optional Sources of Demand

Unpromised Demand      ATP Lead Days:

#### Optional Sources of Supply

Approved PO Requisitions  
 Include null due date reqs

OK

Cancel