

# Approving and Processing a Material Stock Request (MSR)



## APPROVE AN MSR

Navigation: Core-CT Financials>Inventory>Fulfill Stock Orders>Stock Requests>Approve Stock Request

On the Stock Request Approval page enter the Search Criteria and click Search. Select an order from the Search Results to approve.

Favorites Main Menu > Inventory > Fulfill Stock Orders > Stock Requests > Approve Stock Request

### Stock Request Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

#### Search Criteria

Business Unit: = DEP01

Demand Source: = Material Request

Source Bus Unit: begins with DEP01

Order No: begins with

Department: begins with

Destination Unit: begins with

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria


### Search Results

View All First 1-2 of 2 Last

Business Unit	Demand Source	Source Bus Unit	Order No	Department	Destination Unit
DEP01	IN	DEP01	EP112547	(blank)	(blank)
DEP01	IN	DEP01	MSR13290	DEP44391	(blank)

# Approving and Processing a Material Stock Request (MSR)



The Approver (CT\_F\_A\_INV\_MSR\_APPROVER) reviews the order information such as the requested quantities and ChartFields. If the items are approved select the Approved checkbox for each line (or use the  icon to select all lines) and save the page. The lines that were approved are now ready to be reserved and released.

Note – There is no Workflow or Deny button like in ePro and Purchasing. If an Approver does not approve a line or wants to have something changed they would have to notify the MSR Creator to edit the MSR. The MSR Creator would then make the changes to the order lines and notify the Approver that the MSR was updated and is ready for approval.

## Approve Stock Request








Business Unit	Demand Source	Source Bus Unit	Order No	EQ/Build No	Wrk Ord No
DEP01	Material Request	DEP01	MSR13290		

Order Details								Find   View 1	First	1-2 of 2	Last
<b>Location:</b>	0370000004	<b>Dept:</b>	DEP44391	<b>Name:</b>	Yogi Bear	<input checked="" type="checkbox"/>	Approved				
	DEP Osbornedale State Park			<b>Order Line:</b>	1						
<b>Qty Requested:</b>	1.0000	EA		<b>Schedule Line:</b>	1						
<b>Item ID:</b>	CM_2157_1219830			<b>Demand Line:</b>	1						
	DECAL, DEP LOGO, 11 INCH DIA.-1/EA										
<b>Scheduled:</b>	07/22/2014 9:06AM			<b>Scheduled Arrival:</b>	07/22/2014 9:06AM						
<b>Fund:</b>	<b>SID:</b>	<b>Account:</b>	<b>Bud Ref:</b>	<b>ChartField 1:</b>	<b>ChartField 2:</b>	<b>Prog Code:</b>	<b>Project:</b>	<b>Activity:</b>			
11000	10020	54060	2015			00000					

<b>Location:</b>	0370000004	<b>Dept:</b>	DEP44391	<b>Name:</b>	Yogi Bear	<input checked="" type="checkbox"/>	Approved				
	DEP Osbornedale State Park			<b>Order Line:</b>	2						
<b>Qty Requested:</b>	1.0000	EA		<b>Schedule Line:</b>	1						
<b>Item ID:</b>	CM_2157_1520585			<b>Demand Line:</b>	1						
	SIGN - KEG BEER PROHIB SEC-23-4-A5™										
<b>Scheduled:</b>	07/22/2014 9:06AM			<b>Scheduled Arrival:</b>	07/22/2014 9:06AM						
<b>Fund:</b>	<b>SID:</b>	<b>Account:</b>	<b>Bud Ref:</b>	<b>ChartField 1:</b>	<b>ChartField 2:</b>	<b>Prog Code:</b>	<b>Project:</b>	<b>Activity:</b>			
11000	10020	54060	2015			00000					

 Save  Return to Search  Previous in List  Next in List  Notify

# Approving and Processing a Material Stock Request (MSR)



## STEPS FOR PROCESSING AN MSR

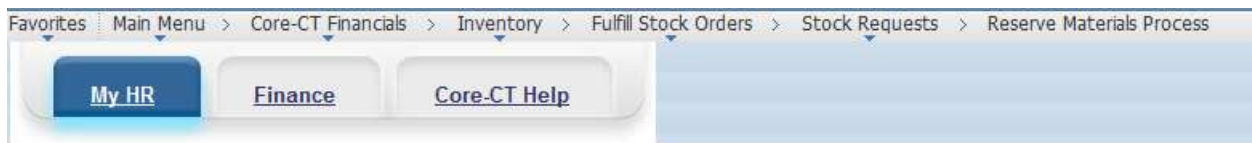
The following processes can be run manually by the MSR Processor (CT AGY INV MSR PROCESSOR) or for some of these steps the Inventory business unit can be added to the Batch processes that run throughout the day.

### RUN THE RESERVATION AND ORDER RELEASE PROCESSES FOR AN MSR USING AUTO PROCESSING

Navigation: Core-CT Financials>Inventory>Fulfill Stock Orders>Stock Requests>Reserve Materials Process

Select an existing Run Control ID from the Search Results or click on the Add a New Value tab to create a new one.

Note – A Run Control ID will also need to be created on the Order Release page prior to running Auto Processing (Core-CT Financials>Inventory>Fulfill Stock Orders>Picking>Order Release Request).



### Reserve Materials Process

Find an Existing Value | Add a New Value

Run Control ID:

**Add**

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

# Approving and Processing a Material Stock Request (MSR)



Enter the Process Request Parameters. The best ways to run this process are by Order Number (individually or a range) or by Location.

For Auto Processing the Auto Release Option is set to Advance to Released and a Release Run Control is entered (the Order Release Run Control). By using Auto Processing the system will group a few processes together (Reserve, Release, Picking Plan) rather than having to run each process individually.

Once the request parameters are set save the page and click Run.

## Reserve Materials

Run Control ID: RESERVE

[Report Manager](#) [Process Monitor](#)

[Run](#)

Process Request Parameters Find | View All | First | 1 of 1 | Last

<b>Process Frequency</b>	*Request ID: RESERVE	Description:	
<input type="radio"/> Process Once	Business Unit: DEP01	To Business Unit: DEP01	<input type="checkbox"/> All Business Units
<input checked="" type="radio"/> Always Process			
<input type="radio"/> Don't Run			
Reserve by Date:		Date From:	To:
*Use Lead Days:	Use Fulfillment Lead Days	Lead Days:	
Demand Source:	Material Request	Source Unit:	DEP01
<b>Order Number:</b>	MSR13290 To: MSR13290	Order Line:	
Schedule Line:		Load ID:	
Delivery ID:		To Delivery ID:	
Route Group:		Route Code:	
Customer ID:		<b>Location:</b>	
Ship To Customer:		Address Number:	
Carrier ID:		Ship Method:	
Parent Product ID:		Item ID:	
Priority:		Product ID:	
*Auto Release Option:	<b>Advance to Released</b>	Release Run Control:	<b>ORDER_RELEASE</b>

Unreserved Demand Lines Report  Purge Report Table [Processing Options](#) [View Process Defaults](#)

[Save](#)

[Return to Search](#)

[Previous in List](#)

[Next in List](#)

[Notify](#)

[Refresh](#)

[Add](#)

[Update/Display](#)

# Approving and Processing a Material Stock Request (MSR)



Select the IN\_FUL\_RSV process to run and click OK.

## Process Scheduler Request

User ID: COREGuarinoDu      Run Control ID: RESERVE

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Server Name:       Run Date:

Recurrence:       Run Time:      

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Reserve Materials	IN_FUL_RSV	Application Engine	Web	TXT	Distribution

Click on the Process Monitor link. Once the IN\_FUL\_RSV runs to Success it will kick off the other processes to run including the CTIN6000. Use the Details link for the CTIN6000 to open the report.

Process List   Server List

---

**Actions**

User ID:       Type:       Last:        Days     

Server:       Name:       Instance:  to

Run Status:       Distribution Status:        Save On Refresh

Process List									
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1978		SQR Report	CTIN6000	COREGuarinoDu	07/22/2014 11:10:56AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	1977		SQR Report	INS6400	COREGuarinoDu	07/22/2014 11:10:51AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	1976		Application Engine	IN_FUL_RSV	COREGuarinoDu	07/22/2014 11:00:04AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	1975		BI Publisher	INX6501	COREGuarinoDu	07/22/2014 9:18:44AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	1974		Crystal	INC6501-	COREGuarinoDu	07/22/2014 9:18:41AM EDT	Success	Posted	<a href="#">Details</a>

# Approving and Processing a Material Stock Request (MSR)



The CTIN6000 Picking Plan shows the items, locations and amounts that need to be pulled. Warning messages will be displayed on the report if an item has zero on hand or not enough stock to fulfill the requested amount.

A Pick Batch ID is also created and displayed in the header on the report.

Report ID: CTIN6000		State of Connecticut		Page No. 1							
Bus. Unit: DEFO1 -- Energy & Environmental Prot.		MATERIAL PICKING PLAN		Run Date 07/22/2014							
		Picking Plan Only		Run Time 11:11:01							
		Picking Plan Sorted by Location (Rank) / Lev1 / Lev2									
		Pick Batch ID: 3737									
LN	Order No.	Line	Location	Item ID	Area	Levl	Levl2	Levl3	Levl4	Qty Avail.	Released
1	DEFO1 00R13200	1	0379000094	CH_2157_1219838	WHSE	AE9	054			1.00EA	EA
			DEP Oxtorendale State Park	BRCAL, DEP 1000, 11 INCH DIA.-						1.00EA	EA
Line	Location	Item ID	Area	Levl	Levl2	Levl3	Levl4	Qty Avail.	Released		
2	0379000094	CH_2157_1520585	WHSE	AE9	054			1.00EA	EA		
	DEP Oxtorendale State Park	SIDS - 820 822R 190M18 SEC-23	WHSE	AE9	054			1.00EA	EA		

At this point the status of the MSR has gone from Unfulfilled to Released.



# Approving and Processing a Material Stock Request (MSR)



Enter the Pick Batch ID that is noted on the Picking Plan or search for one using the look up. A range of Pick Batch ID's can also be entered to view multiple orders at the same time. After entering the Pick Batch click OK.

## Picking Feedback Selection

**Pick Batch Selection**

Pick Batch ID:  Pick Line Number:  [Multiple Line Number Entry](#)

From Pick Batch ID:

To Pick Batch ID:

---

Source:  Src BU:  Order No:  Line:

---

Ship To:  Location:

Load ID:  Carrier ID:

Route:  Route Group:

---


Return Non-Picked Demand Lines

---



# Approving and Processing a Material Stock Request (MSR)



The items and picked amounts for the orders associated with the Pick Batch ID are displayed. Verify the quantities are correct and select the Confirm box for each line that is ready to process (or use the  icon to confirm all lines). Once the Pick Line Actions are selected the page can be saved. The process that runs confirms and then finally depletes the quantities from the business unit's stock.

Note – Quantities on this page can be decreased but not increased. If the quantity is decreased then the remaining balance is canceled after the page is saved (unless the BU is set up for backorders). If the requested quantity needs to be increased then a new MSR would have to be created for the additional amount.

## Material Picking Feedback

Unit:   [Zoom To Line](#) Sort By:   Ascending  Descending

---

**Order Detail** Find | View: 1 First 1-2 of 2 Last

Source: IN Src BU: DEP01 Order Number: MSR13290 Order Line: 1 Schedule: 1

Pick Batch ID: 5737 Pick Line: 1 Item ID: CM\_2157\_1219830 [Substitute](#)

Ship ID: DECAL, DEP LOGO, 11 INCH DIA-

Delivery ID:

Quantity Requested: 1.0000  Quantity Reserved: 0.0000 EA

Quantity Backordered: 0.0000 EA Quantity Picked: 1.0000 EA

[Details](#) [View Stock Request](#)

**Pick Line Action**  
 Confirm  
 Zero Picked  
 Remove

---

**Pick Location Detail** Find | View All: First 1 of 1 Last

Storage Location:

Container ID:

\*Location UOM:  Order Qty Picked:  EA Allocation:

Stocking Qty Picked:  EA

---

Source: IN Src BU: DEP01 Order Number: MSR13290 Order Line: 2 Schedule: 1

Pick Batch ID: 5737 Pick Line: 2 Item ID: CM\_2157\_1520585 [Substitute](#)

Ship ID: SIGN - KEG BEER PROHIB SEC-23

Delivery ID:

Quantity Requested: 1.0000  Quantity Reserved: 0.0000 EA

Quantity Backordered: 0.0000 EA Quantity Picked: 1.0000 EA

[Details](#) [View Stock Request](#)

**Pick Line Action**  
 Confirm  
 Zero Picked  
 Remove

---

**Pick Location Detail** Find | View All: First 1 of 1 Last

Storage Location:

Container ID:

\*Location UOM:  Order Qty Picked:  EA Allocation:

Stocking Qty Picked:  EA

---

**Shipping Override**

Shipping ID:  \*Auto Process: Advance to Depleted

Carrier ID:  Ship Date:  Time:

Ship Via:  Pro Number:

Freight Amount:  Amount Action:

[Run Picking Confirmation](#) [Assign Load](#) [Manage Loads](#)

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# Approving and Processing a Material Stock Request (MSR)



\*\*\*When the Picked Quantity is Zero

When the picked quantity is zero for an item select Confirm and Zero Picked for the Pick Line Action. Selecting those options will process and cancel the specific line when the page is saved. Also by doing this it will display the items that have no stock on the Packing Slip so the users receiving the orders will see the item wasn't shipped.

Note – If you only select Confirm for an item with no stock then the line doesn't process and just remains on the Material Picking Feedback page.

## Material Picking Feedback

Unit:   [Zoom To Line](#) Sort By:   Ascending  Descending

**Order Detail** Find | View All | First | 1 of 4 | Last

Source: IN Src BU: DEP01 Order Number: EP112419 Order Line: 1 Schedule: 1

Pick Batch ID: 5682 Pick Line: 1 Item ID: CM\_2157\_1520584 [Substitute](#)

Ship ID: SIGN - KEEP RIGHT

Delivery ID:

Quantity Requested: 1.0000  Quantity Reserved: 0.0000 EA

Quantity Backordered: 0.0000 EA Quantity Picked: 0.0000 EA

[Details](#) [View Stock Request](#)

**Pick Location Detail** Find | View All | First | 1 of 1 | Last

Storage Location:

Container ID:

\*Location UOM:  Order Qty Picked:  EA Allocation:

Stocking Qty Picked:  EA

**Shipping Override**

Shipping ID:   \*Auto Process: Advance to Depleted

Carrier ID:   Ship Date:   Time:

Ship Via:   Pro Number:

Freight Amount:  Amount Action:

[Run Picking Confirmation](#) [Assign Load](#) [Manage Loads](#)

# Approving and Processing a Material Stock Request (MSR)



## CREATE A PACKING SLIP FOR AN MSR

Navigation: Core-CT Financials>Inventory>Fulfill Stock Orders>Shipping Reports>Packing Slip

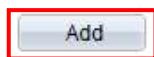
Select an existing Run Control ID from the Search Results or click on the Add a New Value tab to create a new one.



### Packing Slip



Run Control ID:



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

# Approving and Processing a Material Stock Request (MSR)



Enter the Report Request Parameters. For the Printing Selection select Specific and use the drop down menu to select how you want to run the report (by Pick Batch, Order Number, etc.). Depending on what option is selected under Print a Specific there may be additional fields that need to be entered. After the request parameters are entered save the page and click Run.

## Packing Slip

Run Control ID: PACKING\_SLIP\_INS6500

[Report Manager](#) [Process Monitor](#)

Language:   Specified  Recipient's

Report Request Parameters Find | View All First 1 of 1 Last

\*Request ID:  Unit:

**Printing Selection**

All Orders

**Specific**

**Print a Specific**

Pick Batch

\*Copies:

Print Bar Code on Report Flag

Print Parent Product Notes

Page Break by Delivery ID

Select the CTIN6500 process (this is the updated version of the Packing Slip) and click OK.

## Process Scheduler Request

User ID: COREGuarinoDu

Run Control ID: PACKING\_SLIP\_INS6500

Server Name:

Run Date:

Recurrence:

Run Time:

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	IN Packing Slip Custom Report	CTIN6500	SQR Report	Web	PDF	<a href="#">Distribution</a>
<input type="checkbox"/>	IN Packing Slip	INS6500	SQR Report	Web	PDF	<a href="#">Distribution</a>

# Approving and Processing a Material Stock Request (MSR)



Click on the Process Monitor link. After the process has run to Success click on the Details link to open the report.

Process List    Server List

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**Actions**

User ID: COREGuarinoof    Type: [ ]    Last: [ ]    1 Days    **Refresh**

Server: [ ]    Name: [ ]    Instance: [ ] to [ ]

Run Status: [ ]    Distribution Status: [ ]     Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1980		SQR Report	CTIN6500	COREGuarinoDu	07/22/2014 11:55:52AM EDT	Success	Posted	<b>Details</b>
<input type="checkbox"/>	1979		Application Engine	IN_FUL_CONF	COREGuarinoDu	07/22/2014 11:50:03AM EDT	Success	Posted	Details
<input type="checkbox"/>	1978		SQR Report	CTIN6000	COREGuarinoDu	07/22/2014 11:10:56AM EDT	Success	Posted	Details
<input type="checkbox"/>	1977		SQR Report	INS6400	COREGuarinoDu	07/22/2014 11:10:51AM EDT	Success	Posted	Details
<input type="checkbox"/>	1976		Application Engine	IN_FUL_RSV	COREGuarinoDu	07/22/2014 11:00:04AM EDT	Success	Posted	Details

The Packing Slip (CTIN6500) displays the information that was entered on the MSR along with the quantities that were shipped. If a requested item had zero shipped it will also display on the Packing Slip. If there are multiple orders on a Packing Slip it will have separate pages by order number.

State of Connecticut Inventory

Run Dt: 07/22/2014  
Run To: 11:57:06  
Page: 3

DEP 79 Elm Street  
79 Elm Street  
Hartford CT 06106  
United States

Ship To:  
DEP Osbornedale State Park  
381 Roosevelt Drive  
Dept. of Environmental Protection  
Osbornedale State Park  
Deddy CT 06418  
United States

Order Number: MSR1329D    Equip/Building No:    Work Order No:    Emp Id:    Emp Name:

Line-Seq#	Product Number Description	Actual Ship Date	Qty Ordered	Qty Shipped Date	Qty Backorder Comments	Pick Status Id
1-1	CM_2157_1718438 REGAL DEP LOGO, 11 TRCH DIA, -	07/22/2014	1 EA	1 EA		5737
2-1	CM_2157_1528585 SIGN - REG REGR P90HTB 50C-23	07/22/2014	1 EA	1 EA		5737