SDCOE MITI Finance Refresher Activity
Printing Pick Plans

This activity details the steps required to create a pick plan from a material stock request sourced from a requisition.

Navigation: Main Menu > Inventory>Fulfill Stock Orders>Picking>Order Release Request

Step	Action
1.	Click the **Add a New Value** tab.
2.	Click in the **Run Control ID** field. Enter the desired information into the Run Control ID field. **“PICKING_PLAN”**
3.	Click the **Add** button.
4.	You can use the **Order Release Request** page to set parameters for which orders will be included in the pick plan.
5.	The **Request ID** field is used to identify the requestor. Best practice is to use your initials.
6.	You can use the **Business Unit** and **To Business Unit** fields to indicate which business units' information will be included in the Pick Plan. You can select either a single business unit or a range of business units.
7.	Click the **Action** list. Choose **Create Allocations**.
8.	Select **Picking Plan** in the **Output Options** section.
9.	Click the **Run** button.
10.	Click the **Select** option for **Order Release w/reports**. Click the **OK** button.
11.	Click the **Process Monitor** link.
12.	Once the **Run Status** displays **Success** click the **INORDLS** in the **Process Name column**. You may need to click the **Refresh** button.
13.	Click the **INS6000 Success link**.
14.	Click the **View Log/Trace link**.
15.	Click the **INS6000** entry on the **Name** column. Notice you can Save a Copy or Print using the links provided to you.

SDCOE MITI Finance Refresher Activity
Material Picking Feedback

This activity details the steps required to identify a pick plan and allow you to enter feedback.

Navigation: Main Menu > Inventory>Fulfill Stock Orders>Picking>Material Picking Feedback

Step	Action
1.	Confirm your **Unit** is populated and click **Search**.
2.	Click the **Look up Pick Batch ID** button.
3.	The **Search Results** contains all available Pick Batches for the business unit you selected. Select the **Pick Batch ID** for the order which you are entering feedback. Click **OK** button.
4.	Confirm **Order Qty Picked** matched what was physically pulled. If different make changes **Order Qty Picked** field. Confirm/make changes to all lines.
5.	Select **Pick Line Action** for each line, this can be done in mass with buttons above **Order Detail** box.
6.	Click the **Run Picking Confirmation** link.

SDCOE MITI Finance Refresher Activity
Stockroom Feedback

This activity details the steps required to complete putaway from a PO receipt.

Navigation: Main Menu > Inventory>Putaway Stock>Stockroom Feedback

Step	Action
1.	Confirm your **Unit** is populated, click **Search**.
2.	Select the **Putaway Staging ID** for the receipt which is desired.
3.	Review the putaway information, click the **Select All** icon.
4.	Click the **Putaway Items** icon.

SDCOE MITI Finance Refresher Activity
Packing Slip

This activity details the steps required to generate a Packing Slip from the orders which have had Picking Feedback entered.

Navigation: Main Menu > Inventory>Fulfill Stock Orders>Shipping Reports>Packing Slip

Step	Action
1.	Click the **Add a New Value** tab.
2.	Click in the **Run Control ID** field. Enter the desired information into the Run Control ID field. **"PACKING_SLIP"**
3.	You can use the **Packing Slip** page to set parameters for which orders will be included in the packing slip.
4.	Click the **Add** button.
5.	The **Request ID** field is used to identify the requestor. Best practice is to use your initials.
6.	Confirm your **Unit** is populated.
7.	Select **All Orders** for the **Printing Selection**.
8.	Click **Run**.
9.	Click **OK**.
10.	Click the **Process Monitor** link.
11.	Once the **Run Status** displays **Success** click the **Details** link for the INS6500 process. You may need to click the **Refresh** button.
12.	Click the **View Log/Trace link**.
13.	Click the **INS6500** entry on the **Name** column. Notice you can Save a Copy or Print using the links provided to you.

SDCOE MITI Finance Refresher Activity
Cancel/Hold Stock Request

This activity details the steps required to cancel or hold an entire order or just a line of an order.

Navigation: Main Menu > Inventory>Fulfill Stock Orders>Stock Requests>Cancel/Hold Stock Requests

Step	Action
1.	Confirm your **Unit** is populated.
2.	Click the **Search** link.
3.	Select **Purchasing Requisition** from **Demand Source** dropdown.
4.	Confirm/populate **Source Bus Unit** is populated.
5.	Enter **Order No** and click **OK**, or click **OK** for list of all pending orders.
6.	If cancelling/holding entire order select the **Cancel** or **Hold** checkbox, click **Save**. Go to step 9.
7.	If only selecting partial order click the **Details** link.
8.	Select the **Cancel** or **Hold** checkbox for desired lines, click **OK**.
9.	Click **Save**.

SDCOE MITI Finance Refresher Activity
Adjustment

This activity details the steps required to adjust a stock item.

Navigation: Main Menu > Inventory>Manage Inventory>Adjustments

Step	Action
1.	Confirm your **Unit** is populated.
2.	Click the **Search/Add** link.
3.	Select **Item ID** from **Item ID** lookup, click **OK**.
4.	Choose **Adjustment Type** from the **Adjustment Type** dropdown.
5.	Enter **Adjustment Quantity**.
6.	Enter **Comments**.
7.	Click **Save**.

SDCOE MITI Finance Refresher Activity
Replenishment Request

This activity details the steps required to generate a Replenishment Request for stock items.

Navigation: Main Menu > Inventory>Replenish Inventory> Create Replenishment Reqeust

Step	Action
1.	Click the **Add a New Value** tab.
2.	Click in the **Run Control ID** field. Enter the desired information into the Run Control ID field. **"REPLENISHMENT"**
3.	Change **Process Frequency** to **Always**.
4.	The **Request ID** field is used to identify the requestor. Best practice is to use your initials.
5.	Enter Warehouse Business Unit in the **Unit** field.
6.	Choose the **Replenishment Class** from the lookup.
7.	Click **Run**.
8.	Select **IN Replenishment Options** from the **Process List**, click **OK**.

SDCOE MITI Finance Refresher Activity
Load Requisitions

This activity details the steps required to load a Replenishment Request into a purchasing requisition.

Navigation: Main Menu > Purchasing>Requisitions>Load Requisitions

Step	Action
1.	Click the **Add a New Value** tab.
2.	Click in the **Run Control ID** field. Enter the desired information into the Run Control ID field. **"LOAD_REQ"**
3.	Select **IN BATCH** from the **System Source** lookup.
4.	Select **One Request** from the **Run Type** dropdown.
5.	Select Purchasing Business Unit from the **Requesting loader Bus Unit** lookup.
6.	Lookup the **Replenishment Request** which is to be turned into a purchasing requisition from the **Replenish ID** lookup.
7.	Click **Run**.
8.	Click **OK**.

SDCOE MITI Finance Refresher Activity
Manage Replenishment Request

This activity details the steps required to update a Replenishment Request.

Navigation: Main Menu > Inventory>Replenish Inventory> Manage Replenishment Request

Step	Action
1.	Confirm your **Unit** is populated, click **Search** link.
2.	Lookup and Select the **Replenishment ID** which is desired, click **OK**.
3.	Review/change **Reorder Quantity** for each item.
4.	If item is not to be reordered change **Status** dropdown to **Canceled**.
5.	Once all items are reviewed/changed click **Save**.

SDCOE MITI Finance Refresher Activity
RMA

This activity details the steps required to create a RMA request.

Navigation: Main Menu > Inventory>Manage Returned Material>RMA

Step	Action
1.	Confirm your **Business Unit** is populated, click **Add**.
2.	Choose **Reason Code** from lookup.
3.	Choose **Return From Location** from lookup.
4.	Enter **Return To** business unit.
5.	Click the **Internal Shipment History** link.
6.	Update the **Start Date** and **End Date**.
7.	Enter the Purchasing Business Unit in the **Source Business Unit** field.
8.	Enter the Order Number which is being returned in the **Order No** field.
9.	Click **OK**.
10.	**Select** the lines which are being returned.
11.	Click the **Return to RMA** link.
12.	Update the **Quantity Returned** if needed.
13.	Change the **RMA Status** dropdown to **Open**.
14.	Deselect the **Approval Required** check box.
15.	Change the line **Status** to **Open**.
16.	Click **Save**.

SDCOE MITI Finance Refresher Activity
RMA Receipt

This activity details the steps required to create a RMA receipt.

Navigation: Main Menu > Inventory>Putaway Stock>InterUnit and RMA Receiving

Step	Action
1.	Click the **Add a Receiver ID** tab.
2.	Change the **Receipt Type** dropdown to **Return Material Authorization**.
3.	Click **Add**.
4.	Click **Search** link.
5.	Click **OK**.
6.	**Select** the lines which are being received.
7.	Click the **Putaway Details** tab.
8.	Change **Putaway Action** dropdown to **Putaway at Receipt Save Time**.
9.	Click **Save**.