

Transferring Items to Operations / Movement to Stock

Overview

The Receipt Route assigned to a Stock Item determines the series of operations through which the items are processed upon receipt. (For example, Purchasing Inspection (PINS) route: INSP (In Inspection), MRB (Material Review Board), STK (Receipt to Stock))

Once items are in Receipt Routing, the Movement & Disposition application is used to perform the transactions. The system enters a Stock Item into the first operation of the route upon receipt. Users must transfer the Stock Item to subsequent operation in the route.

When stock item(s) are transferred to the last operation in the Receipt Route, the system updates the items to a received (on hand) status.

The following transactions can be performed once an item is received into receipt routing:

- Movement to Stock
- Movement to MRB (QC)
- Returned with or without Replacement
- Split – Move to Stock, Return, and Replacement

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

Navigation

Click Roles, Inventory or Purchasing.

(Citrix users – right click on the menu, choose View by Role, choose Inventory.)

Inventory Purchasing – Statewide > Receive Purchases > Receipt Routing Stock Purchases > Movement

Dist & Mfg - CSI > Inventory – CSI > Receive Purchases > Receipt Routing Stock Purchases > Movement

Procurement > Dist & Mfg - CSI > Purchasing - CSI > Receive Purchases > Receipt Routing Stock Purchases > Movement

Steps

Movement and Disposition

Start this instruction from the Movement & Disposition – Work with Routing Statuses window.

PeopleSoft.
 Movement & Disposition - Work With Routing Statuses
 Select Find Close Form Row Tools
 Order Number * * * Branch/Plant *
 Inventory Number * * * Operation Code *
 Container I.D. * * * Shipment Number *
 Receipt Document * * * Tare Number *
 Previous Batch 991860 * * * Pack Number *
 No records fetched. Customize Grid

Or Num	Or Ty	Or Co	Ord Suf	Line Num	Ope Seq	Oper Code	Qty At Op	UM	2nd Item Number	Supplier	Supplier Description	Route Code	Rec Line
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1. Enter the criteria for information you want to view in the appropriate field(s), including:
 - **Order Number** –use an asterisk "*" to view all orders with a given document type.
 - **Order type** – defaults to ZP but can be overridden
2. Click **Find**.

PeopleSoft.
 Movement & Disposition - Work With Routing Statuses
 Select Find Close Form Row Tools
 Order Number 112817 * * * Branch/Plant *
 Inventory Number * * * Operation Code *
 Container I.D. * * * Shipment Number *
 Receipt Document * * * Tare Number *
 Previous Batch 991861 * * * Pack Number *
 Records 1 - 3. Customize Grid

Or Num	Or Ty	Or Co	Ord Suf	Line Num	Ope Seq	Oper Code	Qty At Op	UM	2nd Item Number	Supplier	Supplier Description	Route Code	Rec Line
<input type="checkbox"/>	112817	ZP	5251	000	1.000	10	INSP	100.000	EA	42506-TR-CP-105	506785	FURNITURE WORLD	PINS
<input type="checkbox"/>	112817	ZP	5251	000	2.000	10	INSP	100.000	EA	56515-TR-CP-145	506785	FURNITURE WORLD	PINS
<input type="checkbox"/>	112817	ZP	5251	000	3.000	10	INSP	100.000	EA	56515-TR-CP-144	506785	FURNITURE WORLD	PINS

3. Choose the Stock Item to move to stock by placing a checkmark to the left of the row.
4. Click **Row, Movement**. The Movement & Disposition - Receipt Routing Movement screen appears

OP	2nd Item Number	Oper Code	Quantity at Operation	UM	Move Oper	Move Quantity	Move UM	Secondary Qty Ordered	Sec UOM	Address Number	Container I.D.
	42506-TR-CP-105	INSP	100.0000	EA	MRB	100.0000	EA		EA	506785	

5. Complete the following fields:

- OP (Option Code) - enter "1"
 - The 1 indicates the intent to move quantity. The Quantity at Operations field shows how many can be moved.
- Move Quantity - enter the total quantity at operation
- Move Operation - enter either MRB or STK:
 - In the event the Stock Items require more review by Quality, Engineering, or Operations Departments, enter MRB (Material Review Board) DO NOT POPULATE LOCATION
 - In the event the Stock Items are ready to move to Inventory, enter STK (Receipt to Stock)
- When receiving a stock item into receipt routing, the count moved into stock (from INSP and/or MRB) must equal the original receipt. If these do not equal you must move the stock back to "INSP" (Inspection Operation) and Reverse Receipt the Purchase Order.

OP	2nd Item Number	Oper Code	Quantity at Operation	UM	Move Oper	Move Quantity	Move UM	Secondary Qty Ordered	Sec UOM	Address Number	Container I.D.
1	42506-TR-CP-105	INSP	100.0000	EA	STK	100.0000	EA		EA	506785	

6. Click **OK** to complete the movement.

- To put away Stock Items(s) in multiple locations, enter **4** in the OP (Option Code) field and click **Row, Multiple Locations**. Identify the locations in the grid and click **OK** to return to the Receipt Routing Movement window.

7. Click **Find**.

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Movement & Disposition - Work With Routing Statuses

Select Find Close Form Row Tools

Order Number 112817 * * Branch/Plant * *
 Inventory Number * * Operation Code * *
 Container I.D. * * Shipment Number * *
 Receipt Document 135389 Tare Number * *
 Previous Batch 991861 Pack Number * *

Records 1 - 3 Customize Grid

Or Num	Or Ty	Or Co	Ord Suf	Line Num	Ope Seq	Oper Code	Qty At Op	UM	2nd Item Number	Supplier	Supplier Description	Route Code	Rec Line
<input type="checkbox"/>	112817	ZP	5251 000	1.000	30	STK	100.00	EA	42506-TR-CP-105	506785	FURNITURE WORLD	PINS	
<input type="checkbox"/>	112817	ZP	5251 000	2.000	10	INSP	100.00	EA	56515-TR-CP-145	506785	FURNITURE WORLD	PINS	
<input type="checkbox"/>	112817	ZP	5251 000	3.000	10	INSP	100.00	EA	56515-TR-CP-144	506785	FURNITURE WORLD	PINS	

8. The line(s) has updated to the appropriate status and a Batch has been created. This batch must be posted.
9. Continue with steps 3 through 8 as needed to complete the movement of the received Stock Items.
10. Click **Close** to end the movement process.