

Need to Order Report

Overview

This process provides the end user the suggested order quantity for items, which are recommended to be reordered.

Required Set-up must be complete before the report can be generated.

- Populate the Buyer Number in Item Branch/Plant – Item/Branch Plant Info screen
- Item Branch/Plant Quantities must be defined

 To have the system automatically calculate the Reorder Point (ROP), a minimum of twelve periods of history must exist in the Item History file. If there is not enough history, enter a reorder point in the “Reorder Point” field in the Item Branch Quantities screen. **If a value in the Reorder Point field exists, it will override the system calculated reorder point.**

The suggested reorder quantity is based on the pre-defined reorder point for the inventory item assigned to a Branch/Plant and open orders.

- Reorder Quantity – The estimated reorder quantity for an item. You can enter this quantity if there is not enough sales history available for the system to accurately calculate a reorder quantity.
- Maximum Reorder Qty – The maximum order quantity for an item. You can base the quantity on factors other than usage, such as perishability, storage capacity, and so forth.
- Minimum Reorder Qty – The minimum order quantity for an item. . You can base the quantity on factors other than usage, such as perishability, storage capacity, and so forth.

Reorder Point – A quantity for an item that specifies when replenishment occurs. Typically, this occurs when the total quantity on-hand plus the quantity on order equal or do not meet a specified quantity. You can enter this quantity or the system can calculate it if there is sufficient sales history.

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.

(Citrix users – right click on the menu, choose Apply Roles, choose Inventory.)

Inventory > Inquiries & Reports > Inventory Reports > Stock Need to Order Report

Steps

Need to Order Report

Start this instruction from the Stock Need to Order Report – Work with Stocked Item Reorder Point window

The screenshot displays the PeopleSoft interface for the 'Stock Need to Order Report - Work With Stocked Item Reorder Point' window. The window title is 'Stock Need to Order Report - Work With Stocked Item Reorder Point'. The interface includes a search criteria form with the following fields and options:

- Radio buttons: Reorder Point, All Items
- Branch/Plant: *
- Category Codes: * *
- Stocking Type: *
- Supplier: [Text Field]
- Buyer Number: [Text Field]
- Requested Date: 04/06/2006
- Display Supplier Item

Below the form, a table header is visible with the following columns: Suggested Order Quantity, UOM, 2nd Item Number, Unit Cost, Supplier Number, Requested Date, and Item Description. The table currently displays 'No records fetched.'

1. Enter the criteria for information you want to view in the appropriate field(s), including:

- Branch/Plant – The Branch/Plant that you will be replenishing stock in

 This report can be run by either the Buyer Number or the Supplier Number. It is recommended to populate the Buyer Number once the setup is complete on the Item Branch Plant.

Populate the Field for Either Buyer Number or Supplier:

- Buyer Number – Individual who is primarily responsible for purchasing inventory stock for a Branch/Plant
- Supplier Number - If known you may use this; however, it is recommended to use Buyer Number
- Select a radio button for either:
 - Reorder Point
 - All Items

2. Click **Find**.

PeopleSoft
Stock Need to Order Report - Work With Stocked Item Reorder Point

Reorder Point (selected) / All Items
Branch/Plant: 2505002W
Category Codes: * *
Stocking Type: *
Supplier: GERDES, PAMELA S
Buyer Number: 113820
Requested Date: 04/06/2006
 Display Supplier Item

Records 1 - 10	Suggested Order Quantity	UOM	2nd Item Number	Unit Cost	Supplier Number	Requested Date	Item Description
<input type="checkbox"/>	3.0000	BX	20019-141157	2.6400	503076	04/06/2006	aprons, disposable
<input type="checkbox"/>	2.0000	EA	20725-292005	4.3000	539930	04/06/2006	keyboard cleaner canned air
<input type="checkbox"/>	290.0000	EA	31030-632454			04/06/2006	envelopes, plain, brown 10x13
<input type="checkbox"/>	10.0000	EA	34564-304805	2.5200	535688	04/06/2006	earplugs waxy moldable
<input type="checkbox"/>	46.0000	EA	45006-110451			04/06/2006	batteries aaa alkaline
<input type="checkbox"/>	7.0000	EA	45006-110857			04/06/2006	batteries aa alkaline
<input type="checkbox"/>	4.0000	CS	47509-730801	65.8800	535688	04/06/2006	sponges, drain 4x4 sterile

3. To View the List: Click Tools, Export Grid Data

PeopleSoft
Stock Need to Order Report - Work With Stocked Item Reorder Point

Tools menu: Data Browser, **Export Grid Data**, Grid Formats, AutoPopulate, Send Shortcut, Refresh

Branch/Plant: 2505002W
Category Codes: * *
Stocking Type: *
Supplier: GERDES, PAMELA S
Buyer Number: 113820
Requested Date: 04/06/2006
 Display Supplier Item

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4. Define the Cell Range and select **CONTINUE**

The Standard Export will allow the user to export all fields without selecting any other criteria.

PeopleSoft
Stock Need to Order Report - Work With Stocked Item Reorder Point

Export Assistant

Export Options

- Export To Excel
- Export to a new Workbook
- Export to an existing Workbook
- Export To Word
- Export To Comma Separated Values (CSV)

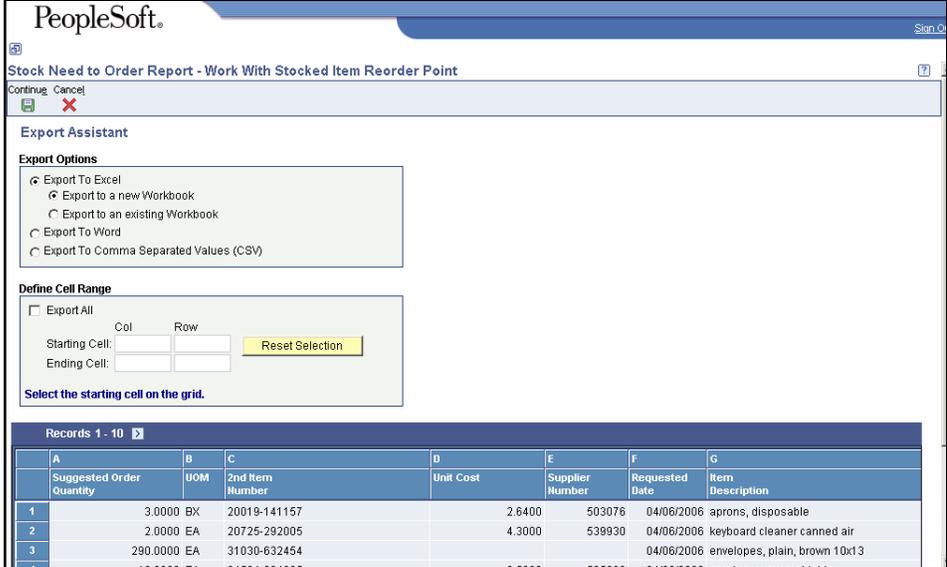
Define Cell Range

- Export All

Click Continue to export all rows and all columns.

- User wishing to export specific cells may unclick the DEFINED CELL RANGE - EXPORT ALL. Users will be able to identify specific cells to export

 To select the cell, place cursor in the starting cell (upper left) and click and ending cell (lower right) and click.



A	B	C	D	E	F	G
Suggested Order Quantity	UOM	2nd Item Number	Unit Cost	Supplier Number	Requested Date	Item Description
1	3.0000 BX	20019-141157		2.6400	503076	04/06/2006 aprons, disposable
2	2.0000 EA	20725-292005		4.3000	539930	04/06/2006 keyboard cleaner canned air
3	290.0000 EA	31030-632454				04/06/2006 envelopes, plain, brown 10x13

- The system will export the information into an excel document. The end user may use this report as a tool, to determine which inventory items need to have a purchase requisition created.

Suggested Order Quantity	UOM	2nd Item Number	Unit Cost	Supplier Number	Requested Date	Item Description	Buyer Number	Branch/Plant
3	BX	20019-141157	2.64	503076	4/6/2006	aprons, disposable	113820	2505002W
2	EA	20725-292005	4.3	539930	4/6/2006	keyboard cleaner canned air	113820	2505002W
290	EA	31030-632454			4/6/2006	envelopes, plain, brown 10x13	113820	2505002W
10	EA	34564-304805	2.52	535688	4/6/2006	earplugs waxy moldable	113820	2505002W
46	EA	45006-110451			4/6/2006	batteries aaa alkaline	113820	2505002W
7	EA	45006-110857			4/6/2006	batteries aa alkaline	113820	2505002W
4	CS	47509-730801	65.88	535688	4/6/2006	sponges, drain 4x4 sterile	113820	2505002W
12	EA	47509-840956	2.35	535688	4/6/2006	tape, adhesive 1" waterproof	113820	2505002W
3	BX	47527-601505	1.31	535688	4/6/2006	pads, alcohol ster 2-ply	113820	2505002W
1	PR	47544-755854	12.46	535688	4/6/2006	hose anti-embolism thigh	113820	2505002W

- Return to NIS from the excel document.
- Click **Close**