

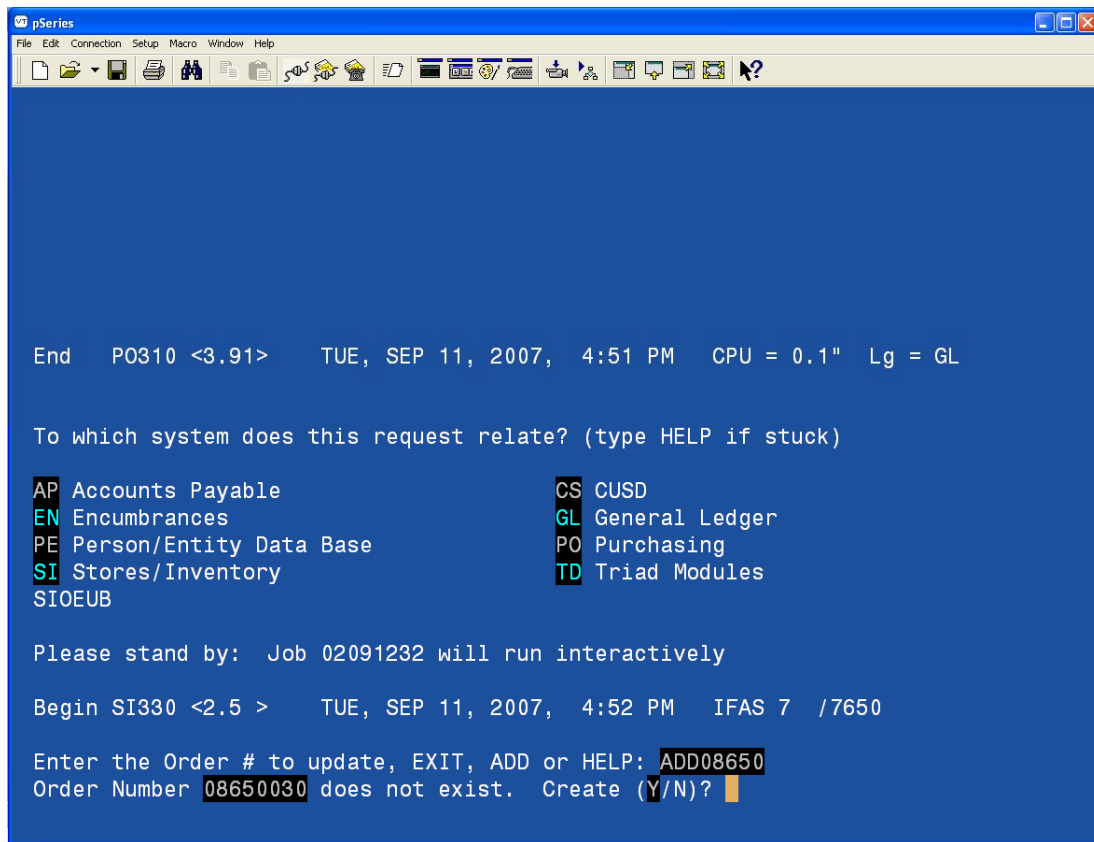
# **User Guide for On-line Stores Inventory Ordering**

**November 2007**

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## ORDER ENTRY



```
pSeries
File Edit Connection Setup Macro Window Help

End P0310 <3.91> TUE, SEP 11, 2007, 4:51 PM CPU = 0.1" Lg = GL

To which system does this request relate? (type HELP if stuck)

AP Accounts Payable          CS CUSD
EN Encumbrances              GL General Ledger
PE Person/Entity Data Base   PO Purchasing
SI Stores/Inventory          TD Triad Modules
SIOEUB

Please stand by: Job 02091232 will run interactively

Begin SI330 <2.5 > TUE, SEP 11, 2007, 4:52 PM IFAS 7 /7650

Enter the Order # to update, EXIT, ADD or HELP: ADD08650
Order Number 08650030 does not exist. Create (Y/N)?
```

After logging in to Bitech

Type **SIOEUB** then press <ENTER>

For a new order: Type **ADD** <fiscal year> <your 3 digit site code> then press <ENTER>

<p>Example: <b>ADD08650</b> <b>08</b> Represents the 2007-2008 School Year. <b>650</b> Represents the site code for Purchasing.</p>
---

After pressing <ENTER> press **Y** to create the new order, then press <ENTER> again.

**\*\*Make sure to write down the order number displayed by the system\*\***  
**\*\* (08650030 in this case) \*\***

## ORDER ENTRY SCREEN (Sometimes referred to as Page 1)

BI-TECH Software CLOVIS UNIFIED SCH DIST Copyright (C) 2006  
ORDER ENTRY

Order No: 07350039 Description: OFFICE SUPPLIES Order Total: 0.00  
Status: NW Sec Cd: Aprv Cd:

Requested By: PURCHASING/B.COTHAM Date: Approved by: Date: Contact: End Use: DO/PURCH/79475

Required Date: Primary Warehouse: 62 Secondary: Price Calc Code: Prep ID: PT3 Trns Format: Misc Code: Customer ID: 650 Code: Customer PO #: Address: Order Codes: Pick Ticket # Purchasing PR#

f4 for HELP GOTO Items: [ ] Print: [ ] Customer Lookup: [ ]  
SI330 <2.1 > SI\_ORDER\_M01 Purchasing Technician 3 COLLECT  
HEAD FORM REFRESH FORM PRINT FORM HELP FORM PREVIOUS FORM NEXT FORM BROWSE FORM EXIT FORM

**DESCRIPTION:** Type a Description of the items to be ordered in UPPER CASE  
(Example: SUPPLIES or ADMIN or OFFICE)

**REQUESTED BY:** Enter the **SITE**/and the **END USER** name.

**REQUESTED BY DATE:** This date is **IMPORTANT!** It is used for budget checking and determines the fiscal year that the order will be charged to. For example, if you want to charge this order to next year's budget, enter 07/01/08. If you leave this field blank, it will default to today's date and this year's budget.

**END USE:** Type your Department Name and Extension.

**CUSTOMER ID:** Type your 3-digit Site Code. (Example: **650** – Purchasing)

- a) Press <ENTER>  
Notice the flashing “Verify entry and press ENTER key again” message.
- b) If the information is correct, Press <ENTER> again.
- c) If the information is **NOT CORRECT:**
  - Make your corrections
  - Then press <ENTER> twice
- c) Press the <F6> key to go to the **Next Form.**

## ORDER ENTRY ITEM SCREEN (Sometimes referred to as Page 2)

BI-TECH Software CLOVIS UNIFIED SCH DIST ORDER ENTRY ITEM Copyright (C) 2006

Order No: 07650039 Desc: OFFICE SUPPLIES Status: NW Order Total: 0.00

Line	Whse	Quantity	Units	Product ID/Description	Account	Ledger	Unit Price	Total	Pr	St
0001		1		1540154	4300096500000600	GL				
0002		10		1540036						
0003										
0004										
0005										
0006										
0007										

GOTO Line: [ ] Order Def: [ ] Print: [ ] Pr Look: [ ] Exc: [ ]

SI330 <2.1 > SI ITEMS2 D01 Purchasing Technician 3 COLLECT

HEAD FORM REFRESH FORM PRINT FORM HELP PREVIOUS FORM NEXT FORM BROWSE EXIT

407, 25 | VT400-7 -- pseries via TELNET | Num Caps

**Note:** The Order Number and Description are carried forward to this screen automatically.

**QUANTITY:** Type in the Quantity desired for the first item.

**PRODUCT ID:** Type in the Product ID of the first item.  
To look up Product ID #'s type a <?> then press <ENTER>  
(Go to page 10 for more details)

**ACCOUNT:** Type in the Object and Org Key that this item will be charged to.  
Example: **430009 6500000600**  
The first 6 digits is the object, the next 10 digits are the org key.

Note: The account number will be carried forward to all subsequent items ordered, so group items with the same Account Number together.

## ORDER ENTRY SCREEN (Continued)

Line	Whse	Quantity	Units	Product ID/Description	Account	Ledger	Unit Price	Total	Pr	St
0001		1		1540154	4300096500000600					
0002	62	10	CS	PAPER, BOND, WHITE 20#, LETTER	4300096500000600		20.02	20.02	NW	
0003	62		BOX	ENVELOPE, CLASP, NATRL, 10"X12			4.97	49.70	NW	
0004										
0005										
0006										
0007										

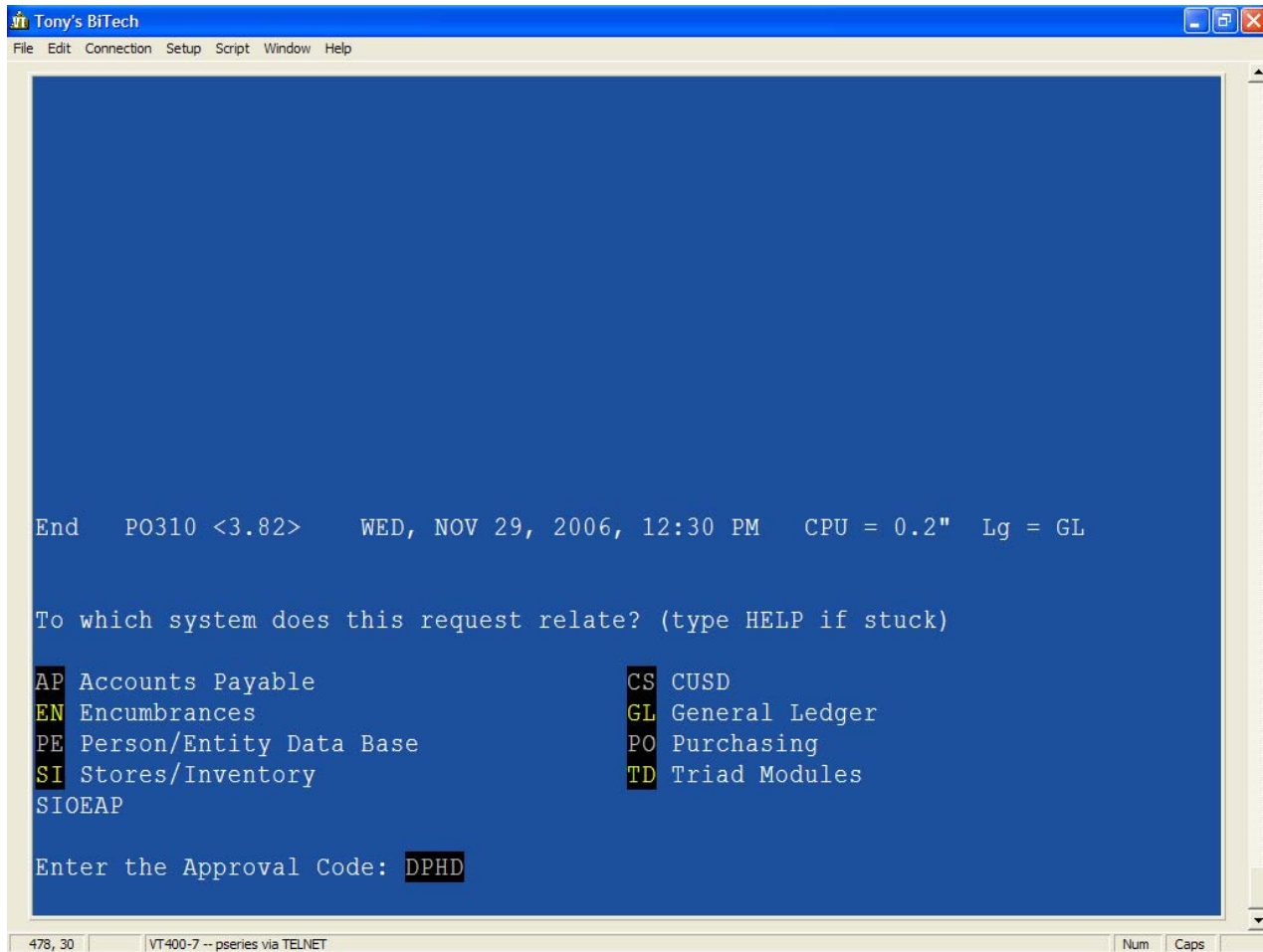
### After each screen is complete:

- Press <ENTER>
- All Units, Descriptions, Unit Cost, and Totals will be filled in
- Verify information on the screen
- Then press <ENTER> again
- The screen will clear and go to the next item in line to be entered

If finished, press the <F8> key to Exit

Then type EXIT to get to the Main Menu

## APPROVAL PROCESS



```
Tony's BiTech
File Edit Connection Setup Script Window Help

End PO310 <3.82> WED, NOV 29, 2006, 12:30 PM CPU = 0.2" Lg = GL

To which system does this request relate? (type HELP if stuck)

AP Accounts Payable          CS CUSD
EN Encumbrances              GL General Ledger
PE Person/Entity Data Base  PO Purchasing
SI Stores/Inventory         TD Triad Modules
SIOEAP

Enter the Approval Code: DPHD
```

478, 30 | VT400-7 -- pseries via TELNET | Num Caps

- a) At the Main Menu type **SIOEAP**
- b) Enter your Approval Code (DPHD or PRIN)
- c) Then press <ENTER>

## APPROVAL PROCESS (Continued)

The screenshot shows a terminal window titled "Tony's BiTech" with a menu bar (File, Edit, Connection, Setup, Script, Window, Help). The main screen displays the following information:

- BI-TECH Software | CLOVIS UNIFIED SCH DIST ORDER ENTRY | Copyright (C) 2006
- Order No: 07650039 | Description: OFFICE SUPPLIES | Order Total: 69.72
- Status: NW New | Sec Cd: [redacted] | Aprv Cd: DPHD
- Requested By: PURCHASING/B.COTHAM | Date: 11/29/2006
- Approved by: [redacted] | Date: [redacted]
- Contact: [redacted] | End Use: DO/PURCH/79475
- Required Date: [redacted] | Primary Warehouse: 62 | Secondary: [redacted]
- Price Calc Code: [redacted] | Prep ID: PT3 | Trns Format: NB | Misc Code: [redacted]
- Customer ID: 650 | Code: OE | Customer PO #: [redacted]
- Address: PO PURCHASING DEPARTMENT | Pick Ticket # [redacted]
- Order Codes: 1450 HERNDON AVE | Purchasing PR# [redacted]
- [redacted] CLOVIS CA 93611

At the bottom, there is a navigation bar with the following options:

- f4 for HELP | GOTO Items: [ ] | Print: [ ] | Customer Lookup: [ ]
- SI330 <2.1 > SI\_ORDER\_M01 Purchasing Technician 3
- FIRST RECORD | DELETE RECORD | PRINT | HELP | PREVIOUS RECORD | NEXT RECORD | COLLECT | EXIT

A green circle highlights the "Aprv Cd: DPHD" field, and a green arrow points from the "HELP" button in the navigation bar to the "GOTO Items: [ ]" field.

The Order Entry screen will appear with the first order to approve. The cursor will be blinking in the Approval Code field.

- If you do NOT want to approve this order Press <F6> to go to the next order.
- If you DO want to approve this order
  - <TAB> to the **GOTO Items:** field at the bottom of the screen
  - Type a “Y” in the brackets [ ] and press <ENTER>

## APPROVAL PROCESS (Continued)

BI-TECH CLOVIS UNIFIED SCH DIST Copyright  
Software ORDER ENTRY ITEM (C) 2006

Order No: 07650039 Desc: OFFICE SUPPLIES Status: NW  
Order Total: 69.72

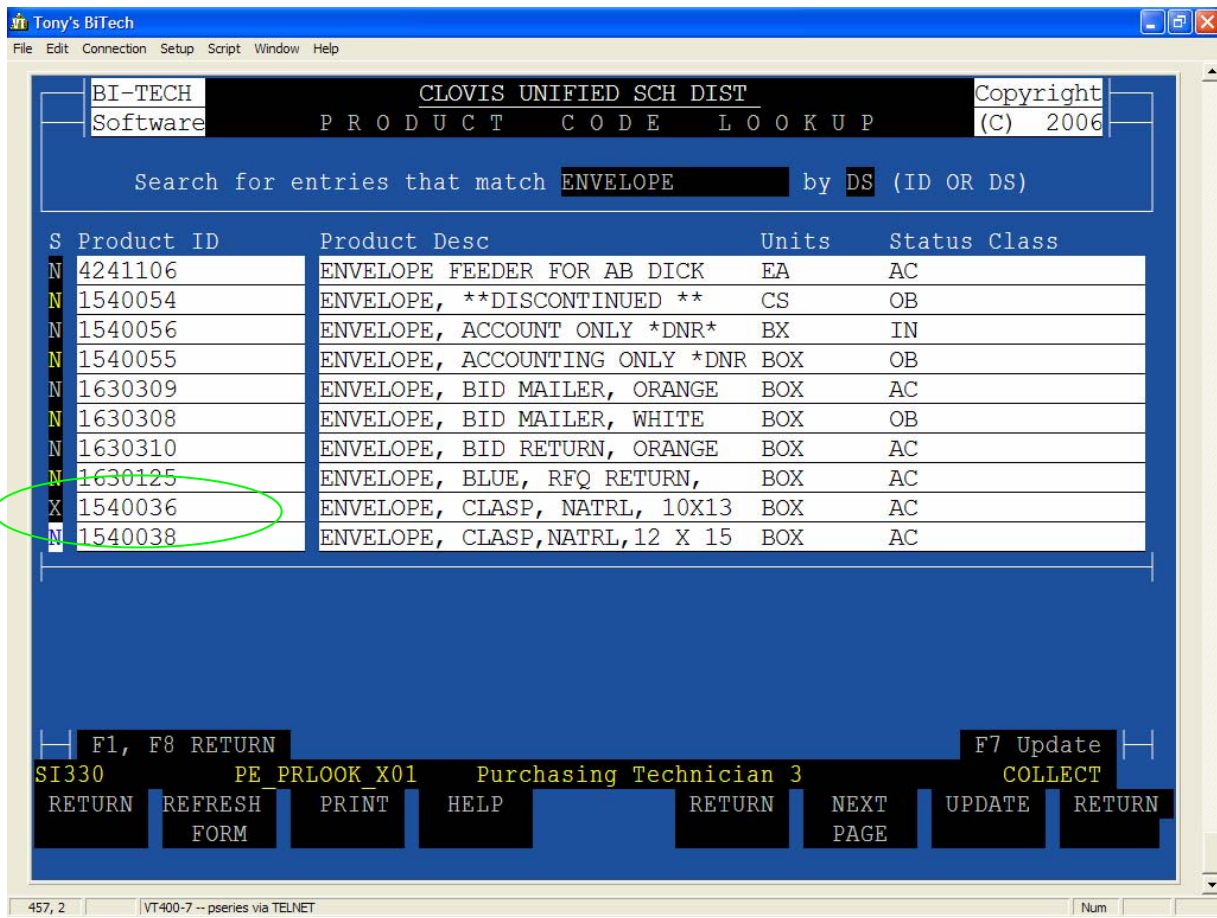
Line	Quantity	Product ID/	Account	Ledger	GL	--	Pr
Whse	Units	Description		Unit Price	Total		St
0001	1	1540154	4300096500000600				
62	CS	PAPER, BOND, WHITE 20#, LETTER		20.02	20.02		NW
0002	10	1540036	4300096500000600				
62	BOX	ENVELOPE, CLASP, NATRL, 10"X12		4.97	49.70		NW

GOTO Line: [ ] Order Def: [ ] Print: [ ] Pr Look: [ ] Exc: [ ]  
SI330 <2.1 > SI ITEMS2\_D01 Purchasing Technician 3 BROWSE

FIRST DELETE PRINT HELP PREVIOUS NEXT COLLECT EXIT  
RECORD RECORD RECORD RECORD RECORD RECORD

- The first page of items ordered appears on the screen.
  - Use <F6> and <F5> to view all the pages of this order. Make changes as necessary.
  - When ready to approve, <TAB> to the “Order Def:” field at the bottom of the screen and type a “Y” in the brackets [ ].
  - Press <ENTER>.
  - You will then be returned to the Order Entry Screen.
- a) Type in your **Approval Code** (DPHD, PRIN or SPPR) and press <ENTER>
  - b) The next warehouse order to be approved will appear on the screen.
  - c) If you have finished approving orders, press the <F8> (Exit) key to exit to the Main Menu.
- NOTE: If the principal or department head that has the ability to Approve Orders actually enters the order, the Approval Code can be entered at the time the order is created. This means they do NOT have to go through SIOEAP step.
  - If approving an order at the time the order is created, enter all of the information on the first screen, then enter the information on the Order Entry Item Screen...THEN go back <F5> to the first screen then <F7> to see the requisition and enter your approval code.

## PRODUCT LOOKUP SCREEN



- Type the first few letters of the item you are searching for at the “**Search for entries that match**” prompt. Then press <ENTER>
- Use the arrow keys or <TAB> to find the product you’re looking for, remember you can also <F6> to see more items.
- Once you find the item you’re looking for put an “X” in the column to the left of it. Then press <ENTER>

The program will now return to the Order Entry Item Screen and will automatically fill in the information for the item you selected.

## STORES ORDER INQUIRY

At the main menu:

- Type **SIHQ**, then <ENTER>
- Then type **IT** then <ENTER>
- Type **N**, then <ENTER> (Do you want a Hard Copy of selections?)
- Type **N**, then <ENTER> (Would you like the short format?)
- Now type **01** for your selection criteria, then <ENTER>
- Enter the order number that you would like to look up.  
(In our example we will be using order # **07650039**)

```
Tony's BiTech
File Edit Connection Setup Script Window Help

User: Purchasing Technician 3      Order Item Information      11/29/06

SELECT  Order No: 07650039

Order No: 07650039  Desc: OFFICE SUPPLIES      Status: FL

Line   Qnty Ord  Product ID      Account      Ledger GL  --  PR
Date   Units  Description      Unit Price   Total      St
Whse   Qnty Shpd  Dist Amt      Tax Amt      Chrg Amt   Disc Amt   PC
-----
0001   1  1540154      430009  6500000600
11/29/06 CS  PAPER, BOND, WHITE 20#, LETTER      20.02      20.02 FL
62     1          20.02      0.00      0.00      0.00 01

0002   10 1540036      430009  6500000600
11/29/06 BOX ENVELOPE, CLASP, NATRL, 10"X12      4.97      49.70 FL
62     10         49.70      0.00      0.00      0.00 01

Hit RETURN when done with this screen or PRINT: █

482, 49      VT400-7 -- pseries via TELNET      Num
```

Status Codes for your order could be:

- **FL Filled:** This means your order has been printed at the warehouse and is in the process of being picked and delivered. It does not necessarily mean that the order has been delivered.
- **PN Pending:** This indicates that some of the items on your order are out of stock and will be on back order.
- **NW New:** The indicates that your order has not been processed. If you see that an order has not been processed after a few days, there may be a problem with the way it was entered and you should call purchasing to check up on it.

## FINDING ORDERS WITHOUT THE KNOWING ORDER NUMBER

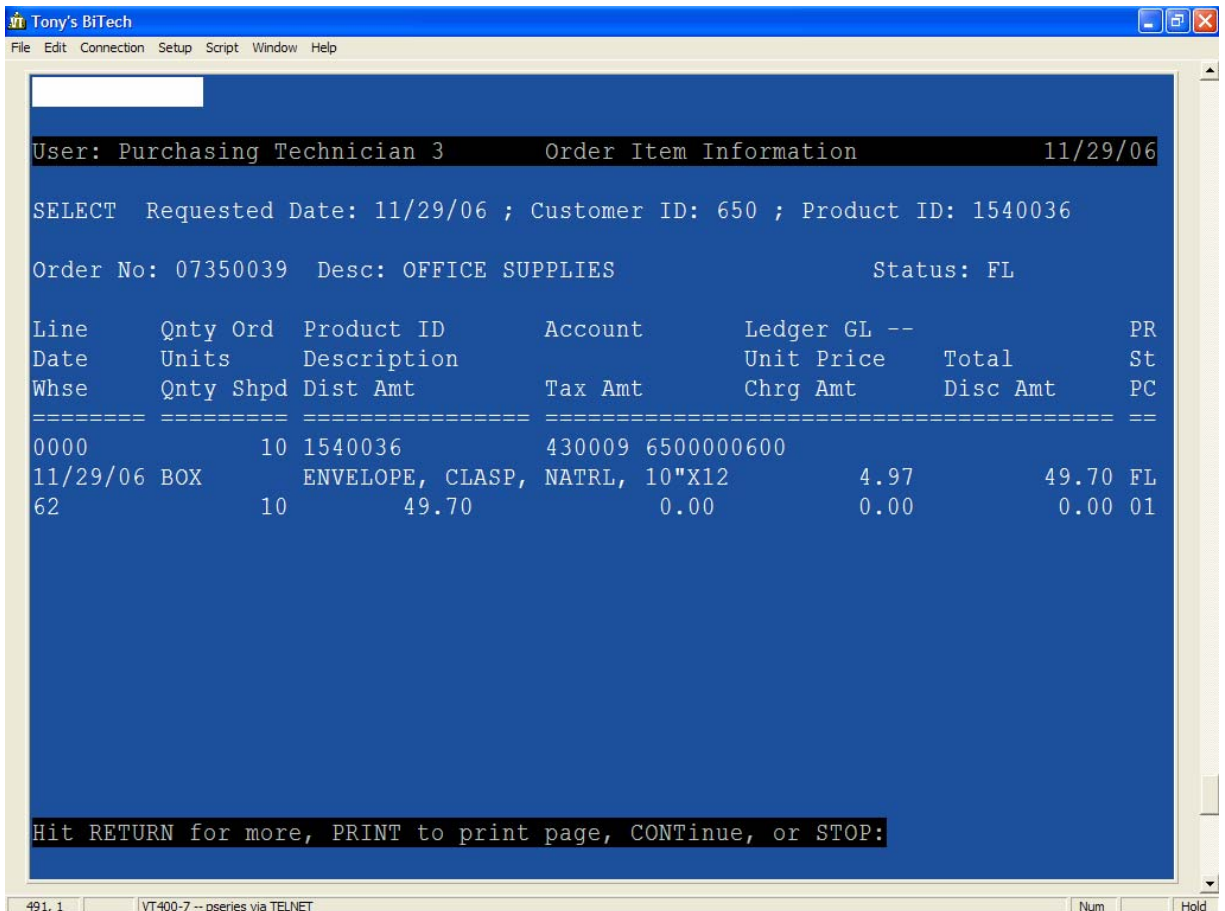
At the main Menu:

- 1) Type **SIHQ**, then <ENTER>
- 2) Then type **IT** then <ENTER>
- 3) Type **N**, then <ENTER> (Do you want a Hard Copy of selections?)
- 4) Type **N**, then <ENTER> (Would you like the short format?)
- 5) Now type **20,29** for your selection criteria, then <ENTER>
- 6) Type your site code for Customer ID (Example : **650** for Purchasing)
- 7) Type the Product ID for an item that was on your order.  
(In our example we will use **1540036** which are the envelopes that we ordered earlier)

This will bring up every order ever placed for this item at this site. You can use other selection criteria to narrow your search down.

Example: If you know the date that the order was placed, you can search by that date as well. In the example above, on Step 5, you could type **08,20,29**

- 08** Will search by Requested at
- 20** Will search by Customer ID
- 29** Will search by Product ID



The screenshot shows a terminal window titled 'Tony's BiTech' with a menu bar (File, Edit, Connection, Setup, Script, Window, Help). The main display area has a blue background with white text. At the top, it shows 'User: Purchasing Technician 3', 'Order Item Information', and '11/29/06'. Below this, it displays search criteria: 'SELECT Requested Date: 11/29/06 ; Customer ID: 650 ; Product ID: 1540036'. The search results show 'Order No: 07350039', 'Desc: OFFICE SUPPLIES', and 'Status: FL'. A table follows with columns for Line, Qty, Ord, Product ID, Account, Ledger GL, Unit Price, Total, and PR. The table contains one main entry for line 0000, dated 11/29/06, for 10 boxes of 'ENVELOPE, CLASP, NATRL, 10"X12' at a unit price of 4.97 and a total of 49.70. A second line (62) shows a quantity of 10 with a total of 49.70. At the bottom, a prompt reads 'Hit RETURN for more, PRINT to print page, CONTINUE, or STOP:'. The status bar at the bottom shows '491, 1' and 'VT400-7 -- pseries via TELNET'.

```
User: Purchasing Technician 3      Order Item Information      11/29/06

SELECT Requested Date: 11/29/06 ; Customer ID: 650 ; Product ID: 1540036

Order No: 07350039  Desc: OFFICE SUPPLIES      Status: FL

Line   Qty  Ord  Product ID      Account      Ledger GL  --      PR
Date   Units  Description      Unit Price   Total      St
Whse   Qty  Shpd  Dist Amt      Tax Amt      Chrg Amt   Disc Amt   PC
=====
0000           10  1540036      430009 6500000600
11/29/06 BOX      ENVELOPE, CLASP, NATRL, 10"X12      4.97      49.70  FL
62           10      49.70      0.00      0.00      0.00  01

Hit RETURN for more, PRINT to print page, CONTINUE, or STOP:
```

**PURCHASING & WAREHOUSE  
STORES INVENTORY  
POLICY STATEMENT**

**WAREHOUSE CREDITS**

Item(s) to be returned for credit must be accompanied by a completed Warehouse Credit Requisition form, **and** a copy of the original warehouse requisition. Returns may only be made in the same school year as the original purchase.

Only items unused and in original packaging will be accepted for credit. No partial cases will be accepted.

The item(s) along with the completed Warehouse Credit Requisition form and a copy of the original warehouse requisitions should be given to the site custodian where it will be picked up by a warehouse driver. Upon receipt of the item at the Central Warehouse, Purchasing will issue a credit to the account number shown on the original requisition.

**EXCHANGE OF PRODUCT**

If you receive an item that you did not order contact the Purchasing Department for instruction on how to exchange it for the correct item.

If you ordered an incorrect item and want to return it and order the correct item, you must:

- 1) Return it for credit (see above) and
- 2) Process a new requisition for the correct item.

**WALK-THROUGH/EMERGENCY ORDERS**

Enter the warehouse requisition as normal, secure proper approval, **then** call the Purchasing Department with your order number. The order will be released immediately which will generate the Packing Slip at the Central Warehouse and you may proceed directly to the warehouse to get your order. Please limit Walk-Through orders to 1 or 2 items.

**BACKORDERS**

Backordered items will appear on your Packing List that accompanies all orders.

Backordered items will be filled immediately upon delivery of new stock.

If you wish to cancel a backordered item, send a memo to the Purchasing Department stating what item(s) you wish to cancel, and the Bi-Tech Order Number they were ordered on.