MATERIAL MASTER REQUEST FORM – INSTRUCTIONS

Department of General Services

Bureau of Procurement

Quality Assurance
Click on the **SRM** tab on the next screen.

Look for and click on **Material Master Request**.

The following screen will display.
SEARCH for a Material

To search for a material that has been created in the system or to verify a like item already exists you select SEARCH from the drop down selections menu.

Enter a material number or description and select the search button.

Example of a description search

Search results

Result list will display the Material number, Description, Material Type, Material Group, Base Unit of Measure and any Alternate Unit of Measure.
### Material Master Request Form

#### Existing Material Search

<table>
<thead>
<tr>
<th>Material No.</th>
<th>Description</th>
<th>Material Type</th>
<th>Material Group</th>
<th>Base Unit</th>
<th>All UOM</th>
<th>Base Qty</th>
<th>All UOM Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>
Create a Material

Requestor will need to use the drop down under the Request Type and select CREATE.

The screen will change to the following:

**Required entry:**
- Plant Number (i.e. 6700)
- Purchasing Group (i.e. 279)

If you do not know your **Plant**, you can use the drop down search capability.
Select the Start Search button to display the list of Plants.

You can scan the list to find your plant number, then click in the box at the left of the line to highlight the line and then OK.
If you do not know your **Purchasing Group**, you can use the drop down search capability.

![Purchasing Group drop down search]

You can scan the list to find your **Purchasing Group number**, then click in the box at the left of the line to highlight the line and then **OK**.

**NOTE:** If you are requesting more than 19 new materials refer to the **MASS Upload** instructions (Page 10).
After entering required information, select **SAVE** to submit your request to DGS/QA.

**IMPORTANT:**

You will receive a final notice allowing you to go back to add or change your request.

Select: **Yes** to submit your request. After submission any new changes will have to be performed by DGS/QA.
**Recommendation**: Open and review the Form Instructions panel to review the needed items for the remainder of the form.

![Form Instructions](image)

1. If any of the items are on a statewide contract, please FIRST review your request with the Commodity Specialist who manages the contract. Also indicate in the comment box the name of the Commodity Specialist who approved your request, as well as the state contract number.
2. Item descriptions are limited to forty (40) total characters.
   - a. Begin the description with a NOUN that identifies the item. (i.e., FILTER). DO NOT abbreviate.
   - b. Use a comma, not a space, to separate the noun, adjective and attribute. (i.e., FILTER, AIR, 12345)
3. Material Types most commonly utilized are:
   - a. ZOPS - Operating Stocks (will have a dollar value and quantities, if placed into a plant's storage)
   - b. ZNVL - Non-valuated Stock (will not have a dollar value, only a quantity, if placed into a plant's storage)
   - c. ZSRV - Services (Material Masters created with this type will not go into a plant's storage)
4. Do NOT enter a supplier's name, brand, or reference number in the short text. Use the PO Text area.
5. Each unique Material Master will be assigned a number after it is approved.
6. All information submitted is subject to change upon DGS/QA review.

Note: Your request will not allow you to save (send for approval consideration) if entered items are incorrect or if a required field is left blank.

Send questions to: [ra-material@pa.gov](mailto:ra-material@pa.gov)
MASS UPLOAD

NOTE: If you are requesting more than 19 new materials, open and follow the instructions below:

1. Click on **Download MM Template**.

2. Select **Open**

3. You will see the form layout as displayed in the subsequent screenshot
4. Expand the cells to allow for data enter.
5. If you need to search for Material Type and/or Material Group – minimize the worksheet to view the request screen
   a. Use the drop down search capability.
6. Select **SAVE As** an Excel Workbook to your Desktop.
a. Open the Excel Workbook and expand the columns. Fill in the information for your material master request.

7. Select the entire Workbook and format the cells as TEXT. Fill in the needed data for your request(s) (Description, Material Type etc.).

**The following fields are required:**

**DESCRIPTION** (40 characters maximum): Describe the material (Noun, adjective, adjective etc.) Upper or lower case will be accepted.
Note: **DO NOT** start your description with a number or blank space – you will receive an error message and you will not be able to submit your request until corrected.

**MATERIAL TYPE:** If you do not know the material type – use the search capability

You can scan the list to find your Material Type list, then click in the box at the left of the line to highlight the line and then OK.
MATERIAL GROUP:

If the Show Filter Criteria is hidden click on the button to open Show Filter Criteria. This will allow you to search for the material group.

You can scan the list to find your Material Group list, or use the filter criteria,

1. Enter a description (partial) followed by an asterisk “*”.
2. **Uncheck** “Restrict Number of Value List Entries To”.
3. Click on ‘Start Search’

4. View the result screen list.

5. To select the material group, click in the box at the left of the line to highlight the line and then OK.
BASE UNIT OF MEASURE (Base Unit): The unit of measure you will be stocking/issuing the material by. (I.e. EACH, PAC, CS)

ALTERNATE UNIT OF MEASURE (Alt. UOM): OPTIONAL - The unit of measure that you will be using to purchase the material from your vendor. (I.e. PAC, BOX, CASE etc.)

BASE UNIT OF MEASURE QUANTITY (Base Qty): The quantity in the selected base unit of measure you entered above will be “1”, unless you have entered an Alt.UOM, in which case it will be the amount/quantity in that unit. (I.e. PAC = 12, BOX = 24, CASE = 144 etc.)

ALTERNATE UNIT OF MEASURE QUANTITY (Alt. UOM Qty): ONLY NEEDED WHEN an Alt.UOM is entered this will be “1”.

CENTRAL CONTRACT: Not required at this time.

ADDITIONAL OPTIONAL FIELDS:

PO TEXT – You may enter up to 255 characters (this includes spaces) Do not use any commas.

8. Select SAVE – Excel Workbook and rename the file to reflect your plant number.
9. Select your Desktop as the site to save the file to.
10. Change the FILE TYPE to .CSV (CSV (Comma delimited))
11. Return to the Material Master Create screen.

12. Use the **Browse** button. Locate your .CSV file on your desktop, click on it to highlight and then select **open**.

13. Verify your file name shows in the Mass Update: window

14. Select **Upload**

The upload file will populate the fields on the material master request form.
15. Select **SAVE** to submit your request(s).

**IMPORTANT:**

16. You will receive a final notice allowing you to go back to add or change your request.

17. Select: After submission any new changes will have to be performed by DGS/QA.
NOTE:

If there is data missing you will receive an error message indicating the area of the error. If all required field entries are complete and correct, you will receive a notice at the top of the screen. Make note of this number for future follow-up, if needed. The requestor will also receive an email notification of the completed transaction.
REQUEST A CHANGE TO A MATERIAL

Select **Change** from the drop down menu.

Enter the **Material Number** of the item you would like to have changed or utilize the search function.

Click on the **Search** button.
The material information will display

Enter your **Plant** and **Purchasing Group** Information

Click in the area you want to change

Make your changes
Requestor is required to supply a comment to justify the change request.

Request Comments:
Color of ball changed
Alt UoM of BOX added 12 each = 1 box

Select SAVE to submit your change request.

If all required field entries are complete and correct, you will receive a final notice allowing you to go back to add or change your request.

**IMPORTANT:**

You will receive a final notice allowing you to go back to add or change your request.

Select: Yes to submit your request. If you select yes, you will receive a notice at the top of the screen.

Make note of this number for future follow-up, if needed. The requestor will also receive an email notification.

After submission any new changes will have to be performed by DGS/QA.
Material Master Fact Sheet

- **Form Problem?**
  If you have an issue using the new electronic MM form, capture it with a screenshot and email to ra-material@pa.gov with a brief description so QA can determine if it is a business process or system issue.

- **Material Master Role Needed in Order to Use the Electronic Form**
  In order to use the electronic form, please ensure you have this role by checking with your HR Office:
  YBC: A_ML_SV_MSTR_REC_PROC_*
  Agency Material – Service Master Records Processor (RV0040)

- **Paper Version Phase-Out Date**
  While you should begin to use the electronic form immediately after training, the paper version will remain during a brief transition period. May 30, 2014, is the last day for the paper version. You will need to contact QA for any exceptions to use the paper version after May 30, 2014.

- **Quality Specialists**
  -- Riccardo Ayler, QA Specialist, rayler@pa.gov, (717) 346-8114
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