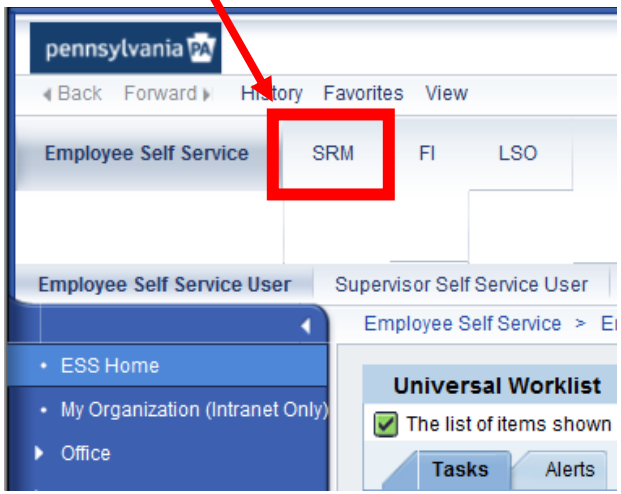
MATERIAL MASTER REQUEST FORM – INSTRUCTIONS

Department of General Services

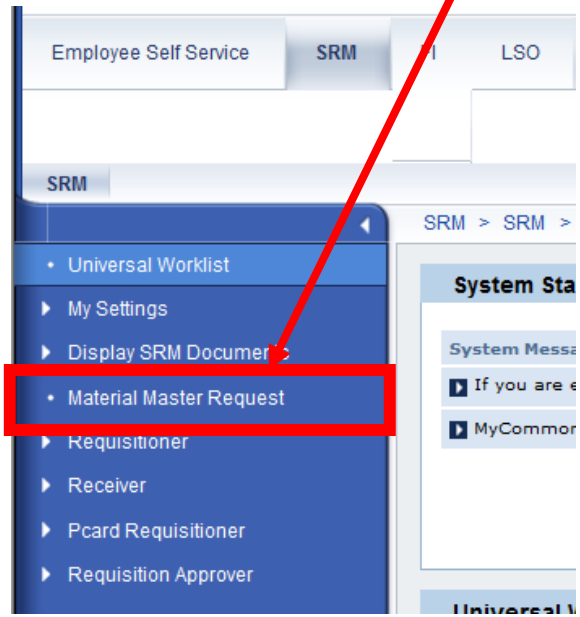
Bureau of Procurement

Quality Assurance

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



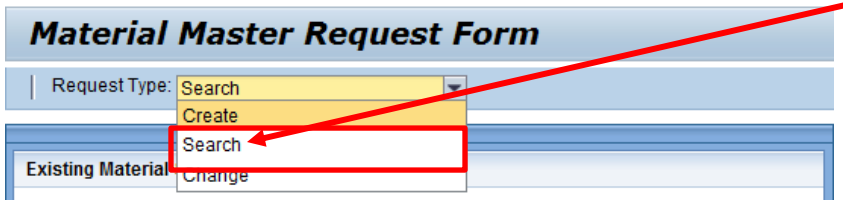
Look for and click on **Material Master Request**.

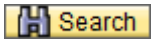


The following screen will display

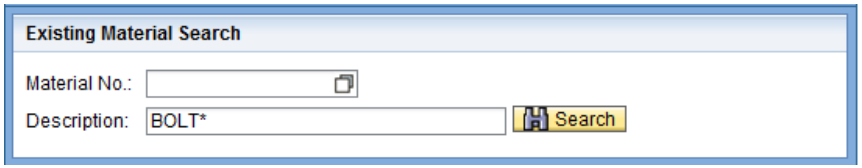
SEARCH for a Material

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 

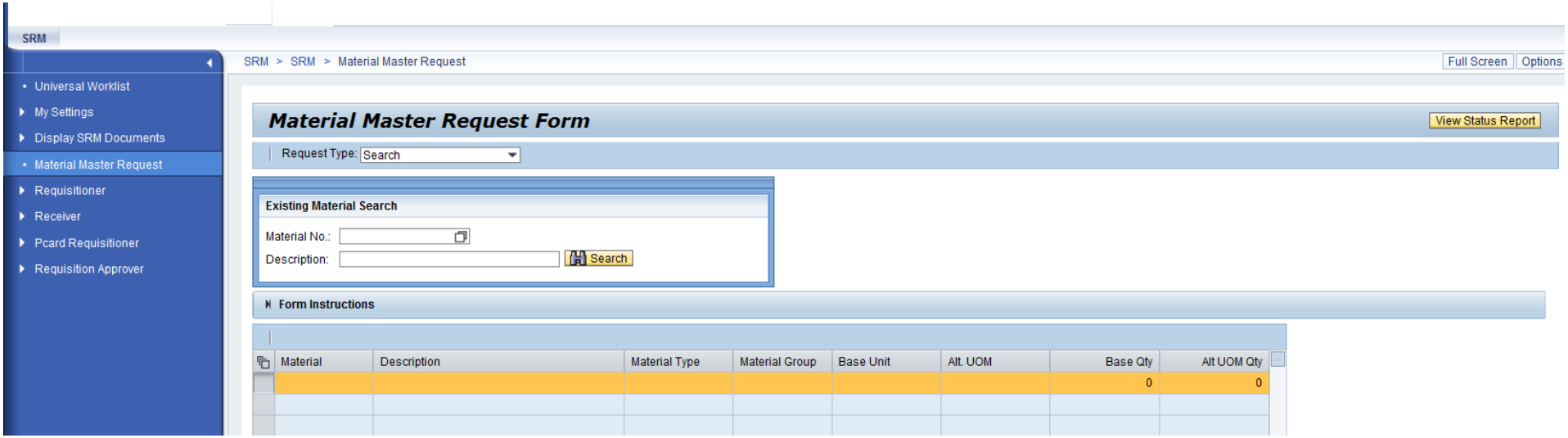
Example of a description search



Search results

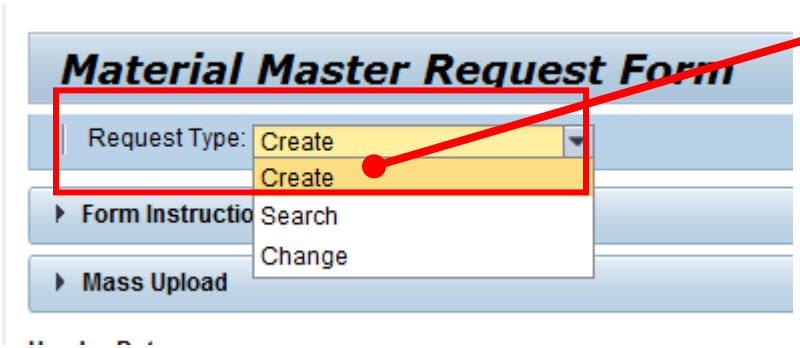
Material	Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty
121078	BOLT,CLOSET,JOHNNY,1/4"X2-1/4",2/PK	ZOPS	31161600	EA	PAC	2	1
122720	BOLT,CARRIAGE,5,16"X2 1,2"	ZOPS	31161600	EA	EA	1	1
122721	BOLT,U,1,4"C1 3,4"X3",W,NUTS,07848070	ZOPS	31161600	EA	EA	1	1
122722	BOLT,5/8"X1-1/2",2WASHER,1 NUT,HEX HEAD	ZOPS	31161600	EA	EA	1	1
122723	BOLT,6",FT SPRING ACTION,STEEL,31056	ZOPS	31161600	EA	EA	1	1
122724	BOLT,CARRIAGE,1,4"X1",RND HD,ALL THREAD	ZOPS	31161600	EA	EA	1	1
122725	BOLT,CARRIAGE,3,8"X1",RND HD,ALL THREAD	ZOPS	31161600	EA	EA	1	1
122726	BOLT,CARRIAGE,3,8"X9",RND HD,ALL THREAD	ZOPS	31161600	EA	EA	1	1
122727	BOLT,CARRIAGE,ROUNDHEAD,1/4THREAD,3/8X9"	ZOPS	31161600	EA	EA	1	1
122728	BOLT,LAG,3,8"X4",HEX HD	ZOPS	31161600	EA	EA	1	1
122729	BOLT,CARRIAGE,3,8"X10",RND HD,QTR THREAD	ZOPS	31161600	BOX	BOX	1	1
122730	BOLT,EYE,3,8"X6",W,HEX NUTS	ZOPS	31161600	EA	PAC	10	1

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

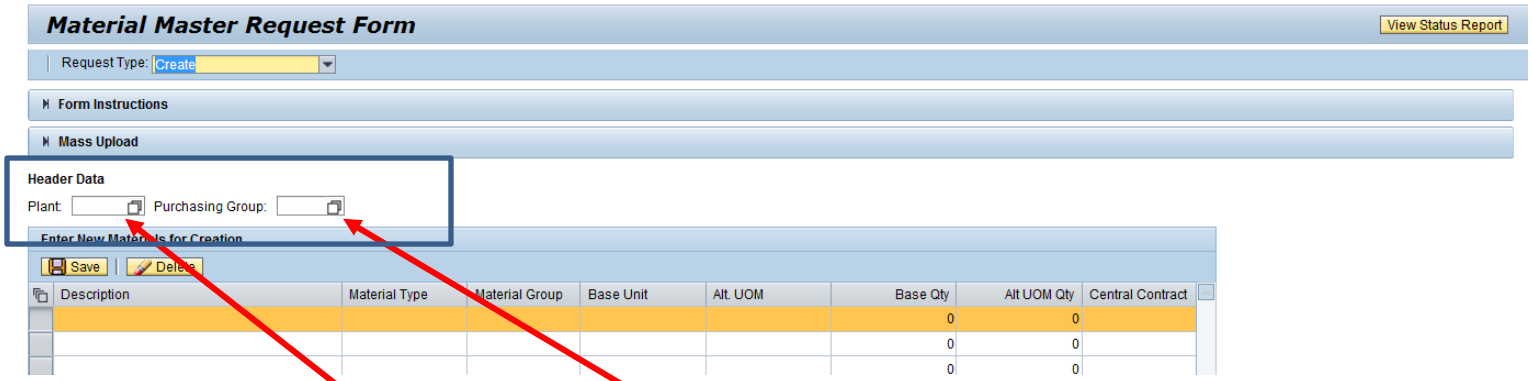

SRM
SRM > SRM > Material Master Request
Full Screen
Options
Universal Worklist
My Settings
Display SRM Documents
Material Master Request
Requisitioner
Receiver
Pcard Requisitioner
Requisition Approver
Material Master Request Form
View Status Report
Request Type: Search
Existing Material Search
Material No.:
Description:
Search
Form Instructions
Material
Description
Material Type
Material Group
Base Unit
Alt. UOM
Base Qty
Alt UOM Qty
0
0

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

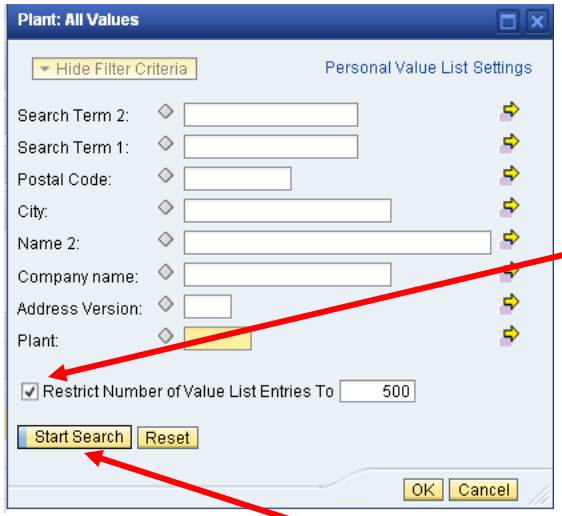


Required entry:

Plant Number (i.e. 6700)

Purchasing Group (i.e. 279)

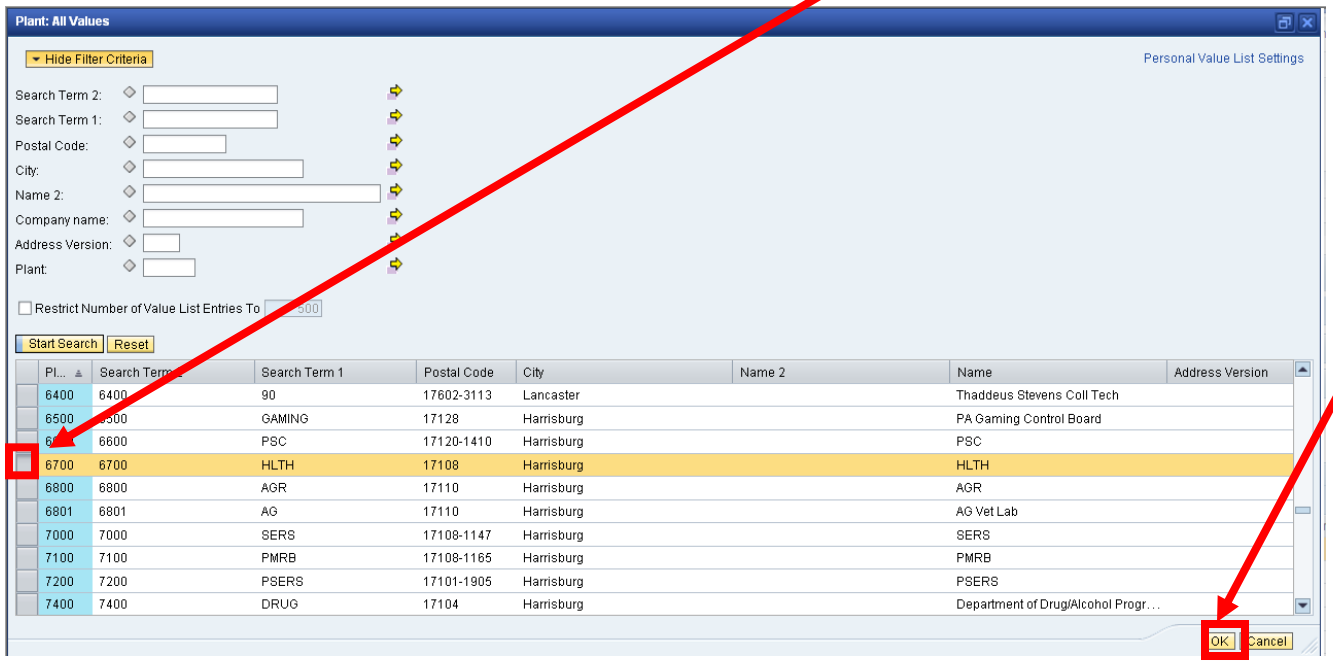
If you do not know your **Plant**, you can use the drop down search capability.

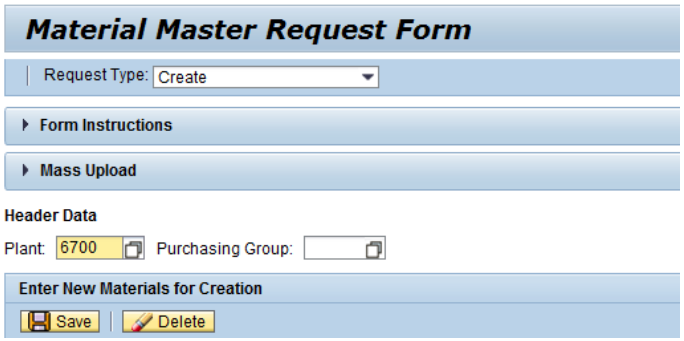


Remove the check mark at the left of the "Restrict Number of Value List Entries To" to clear the number listed.

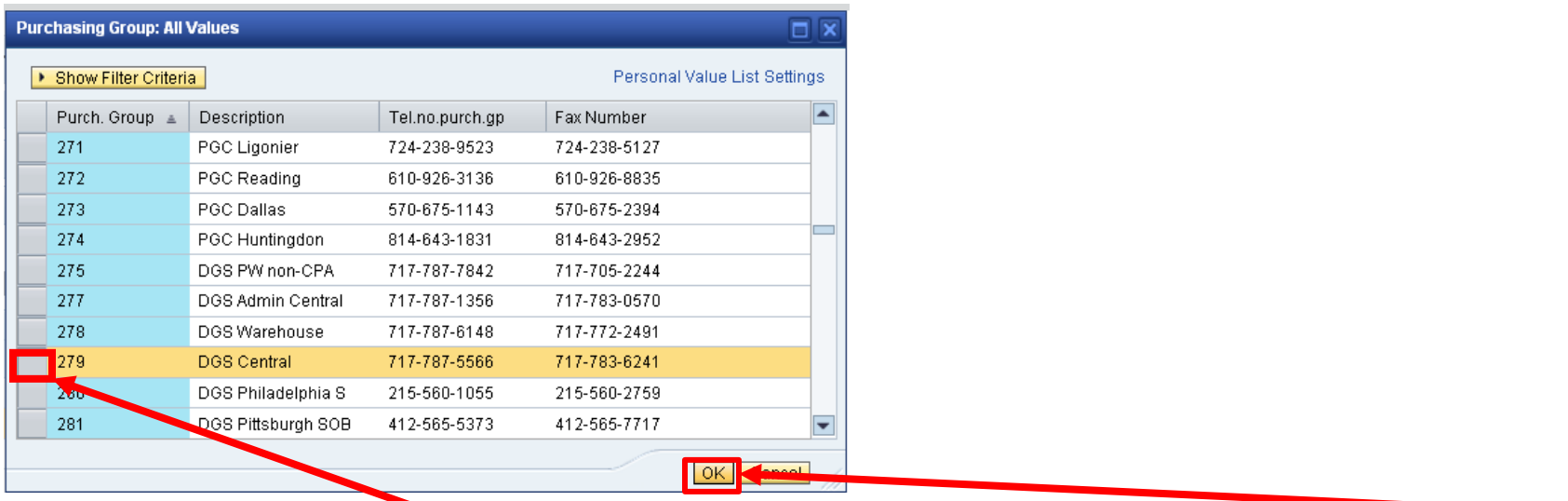
Select the Start Search button to display the list of Plants.

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.



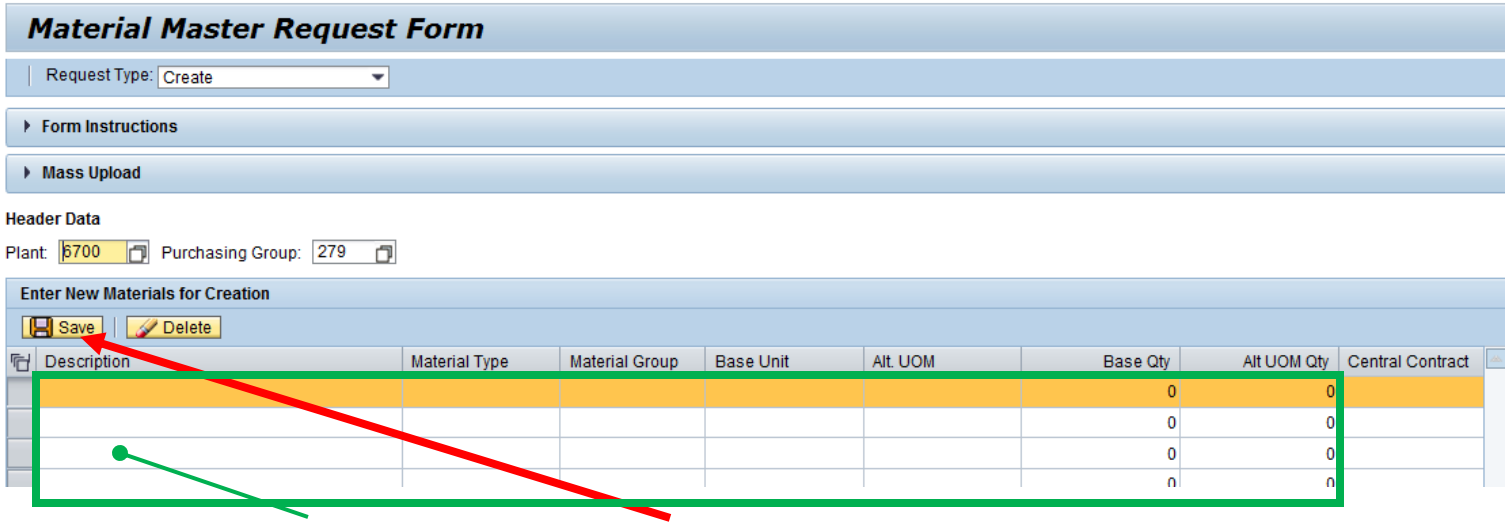


If you do not know your **Purchasing Group**, you can use the drop down search capability.



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).



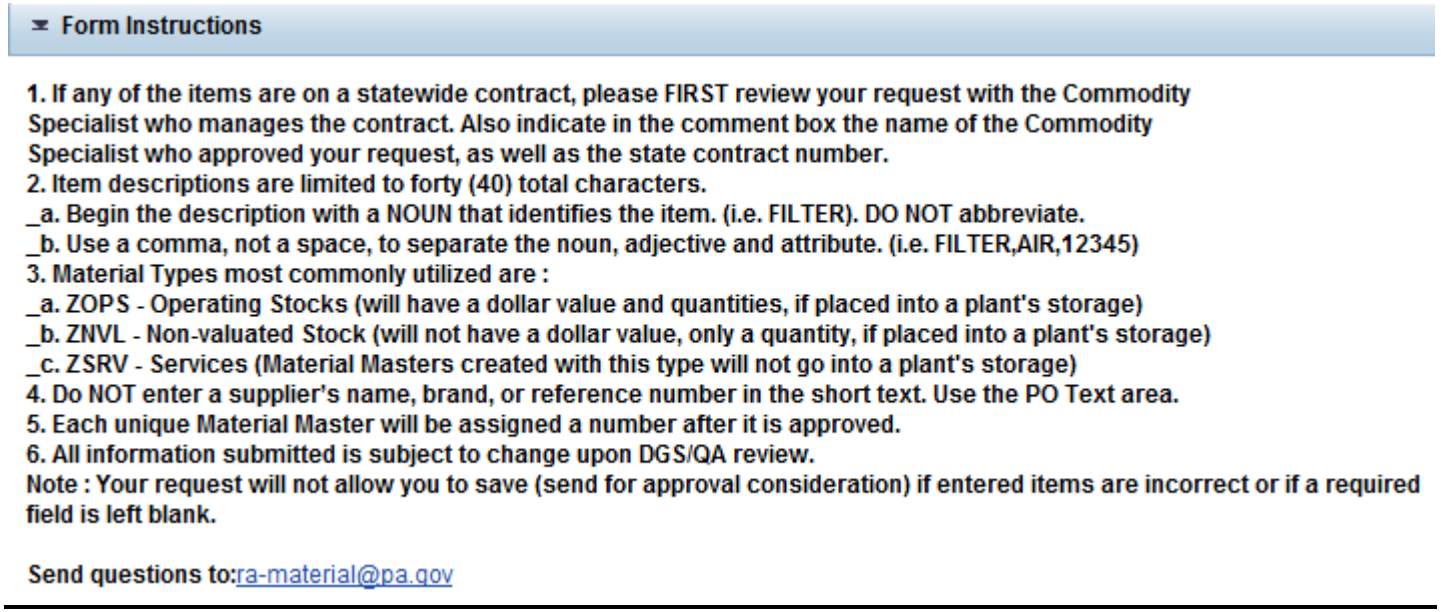
After entering required information, select <u>SAVE</u> to submit your request to DGS/QA.

IMPORTANT:

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

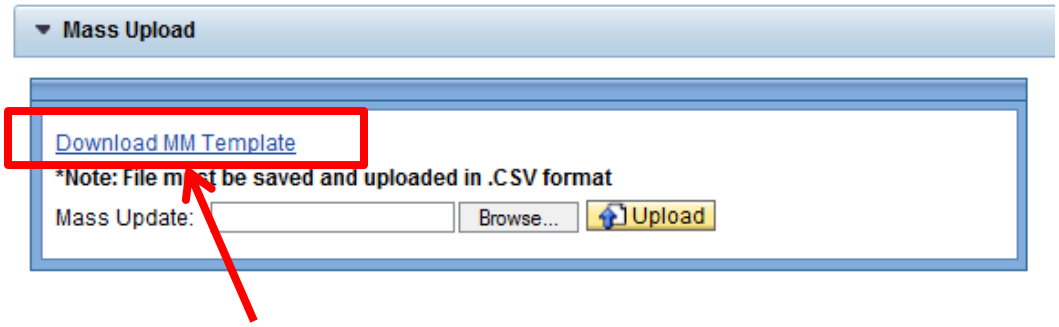
Select: Yes to submit your request. **After submission any new changes will have to be performed by DGS/QA.**

Recommendation: Open and review the Form Instructions panel to review the needed items for the remainder of the form.



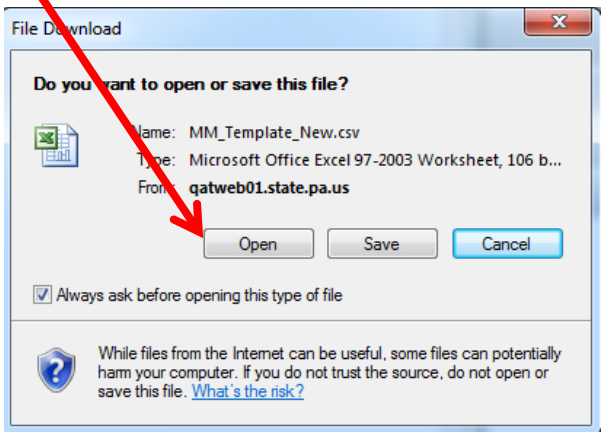
MASS UPLOAD

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

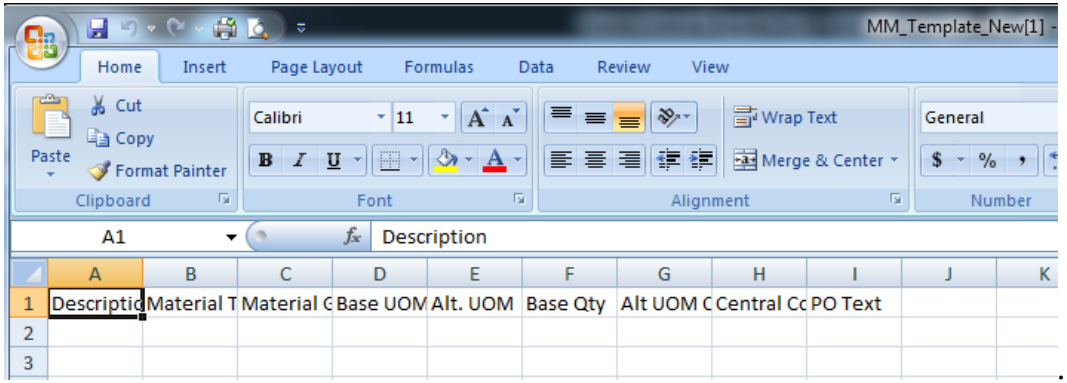


1. Click on **Download MM Template**.

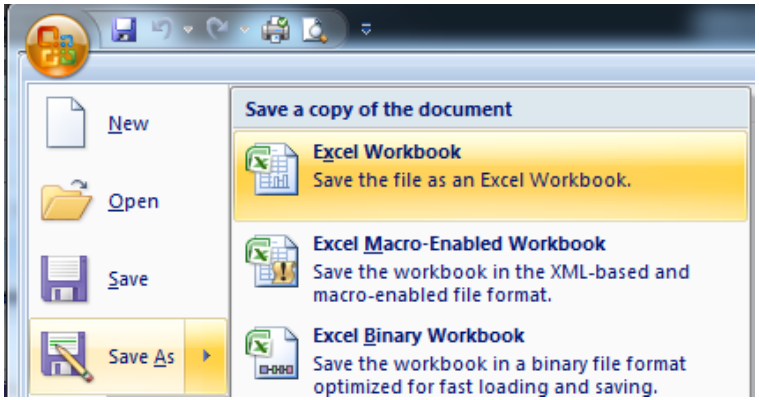
2. Select **Open**

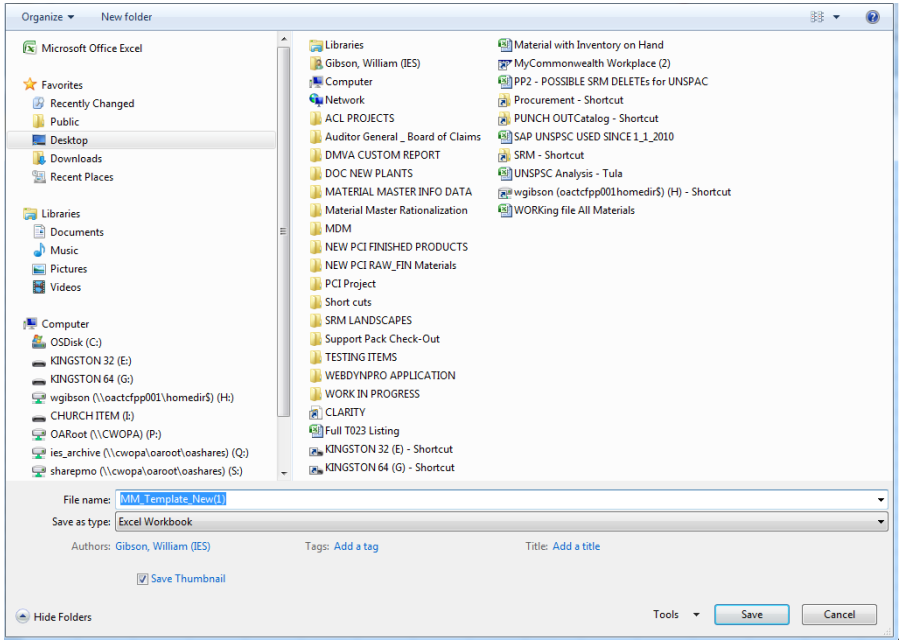


3. You will see the form layout as displayed in the subsequent screenshot

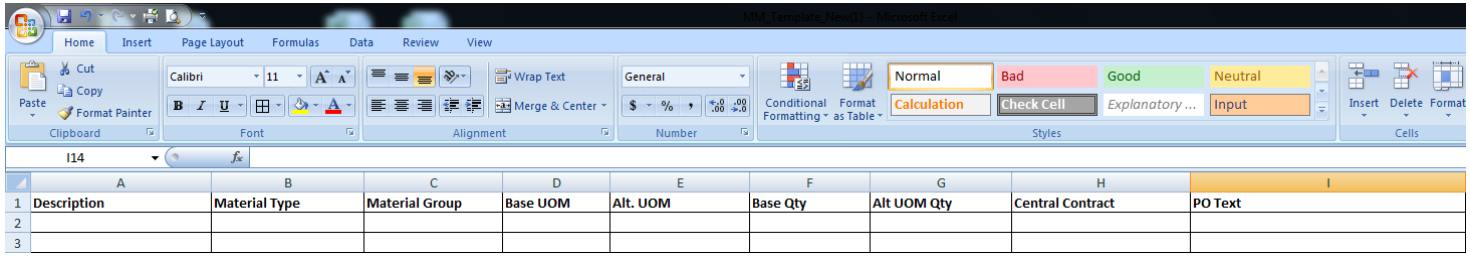


4. Expand the cells to allow for data enter.
5. If you need to search for Material Type and/or Material Group – minimize the worksheet to view the request screen
    a. Use the drop down search capability.
6. Select **SAVE <u>As</u>** an Excel Workbook <u>to your Desktop</u>.





a. Open the Excel Workbook and expand the columns. Fill in the information for your material master request.



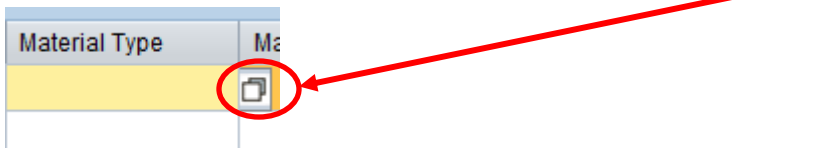
7. Select the entire Workbook and format the cells as TEXT. Fill in the needed data for your request(s) (Description, Material Type etc.).

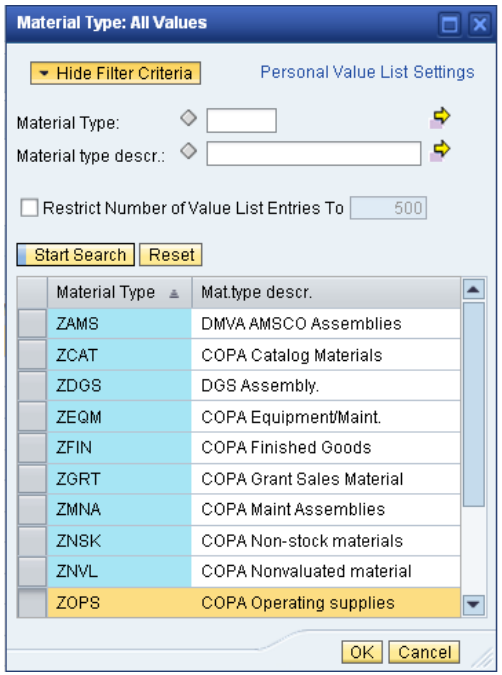
The following fields are required:

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.

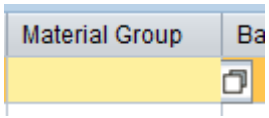
MATERIAL TYPE: If you do not know the material type – use the search capability





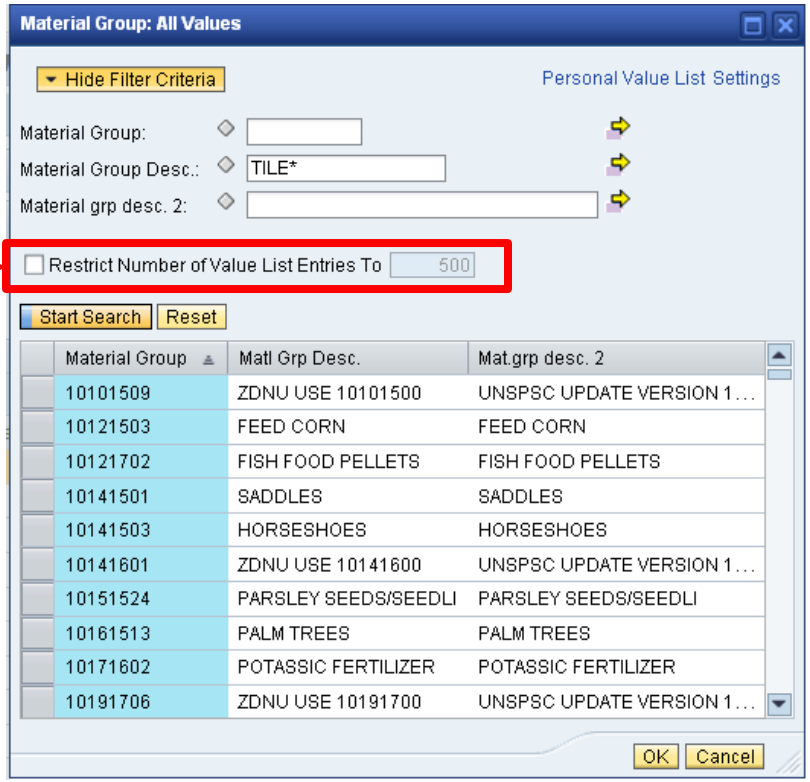
You can scan the list to find your Material Type list, then click in the box at the left of the line to highlight the line and then OK.

MATERIAL GROUP:



If the Show Filter Criteria is hidden click on the button to open

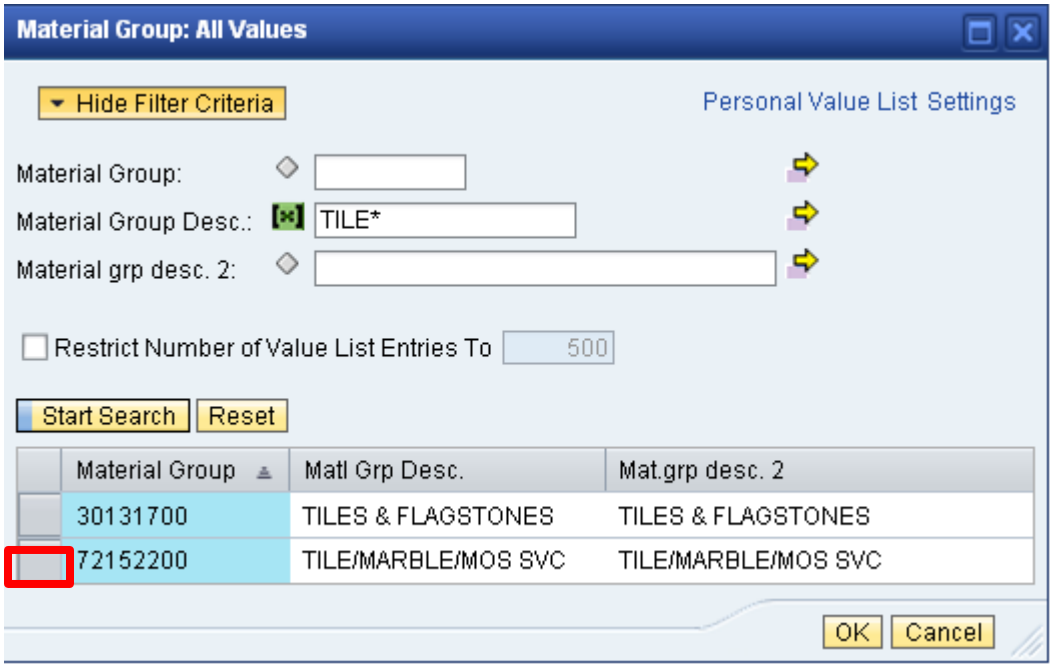
This will allow you to search for the material group.



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.)

Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
tile,floor,white,3x3	ZOPS	30131700	ea	cs	144	1	

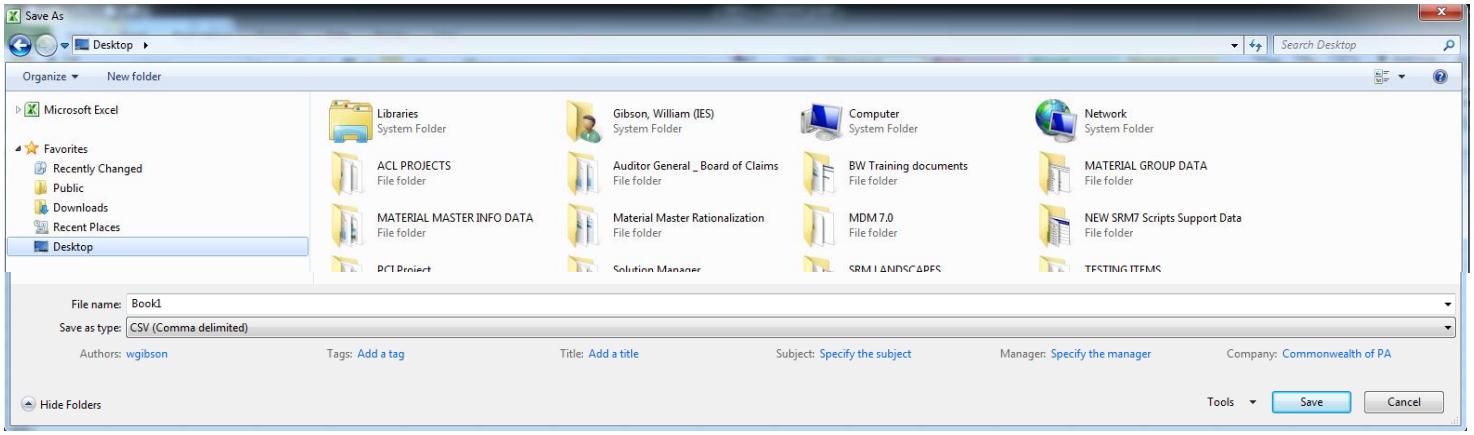
ALTERNATE UNIT OF MEASURE QUANTITY (Alt. UOM Qty): ***ONLY NEEDED WHEN*** an Alt.UOM is entered this will be "1".

CENTRAL CONTRACT: Not required at this time.

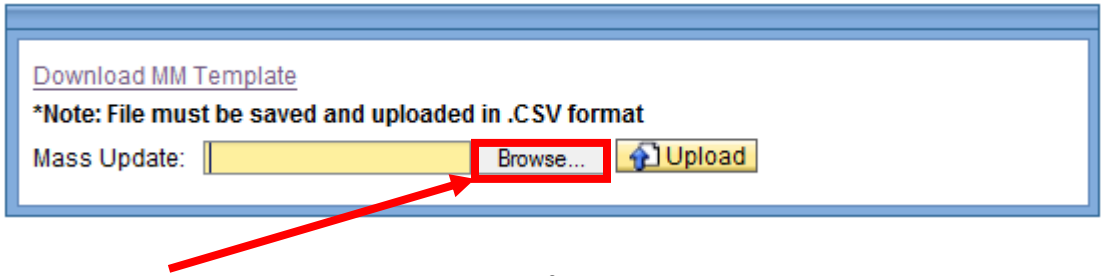
ADDITIONAL OPTIONAL FIELDS:

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

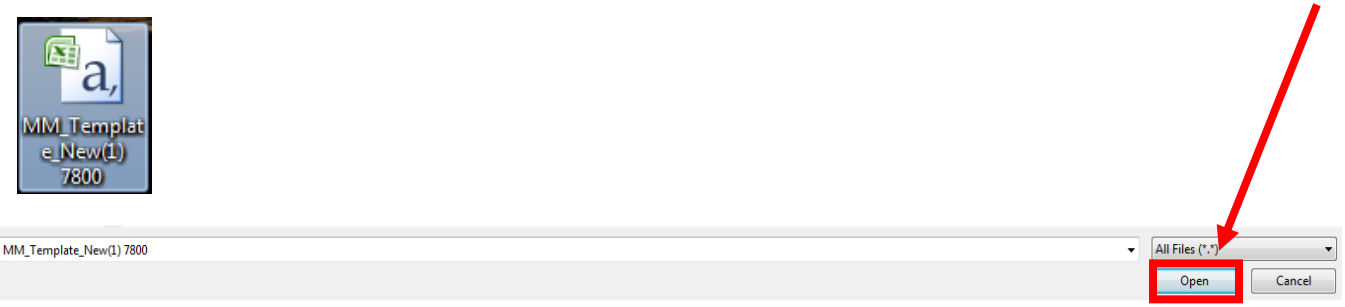
8. Select SAVE – Excel Workbook and rename the file to reflect your plant number.
9. Select your Desktop as the site to save the file to.
10. Change the FILE TYPE to .CSV (CSV (Comma delimited))



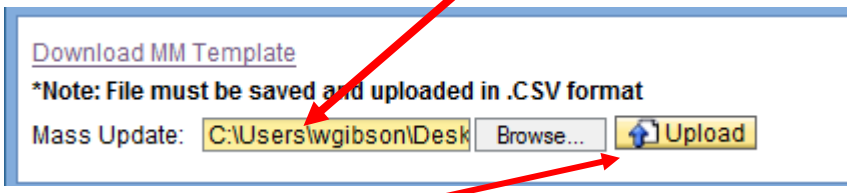
11. Return to the Material Master Create screen.



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.

Enter New Materials for Creation

Save | Delete

Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
JACK,TRUCK, HI-BOY 1	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 2	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 3	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 4	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 5	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 6	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 7	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 8	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 9	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 10	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 11	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 12	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 13	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 14	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 15	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 16	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 17	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 18	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 19	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 20	ZOPS	41100000	EA	BOX	4	1	

15. Select **SAVE** Save to submit your request(s).

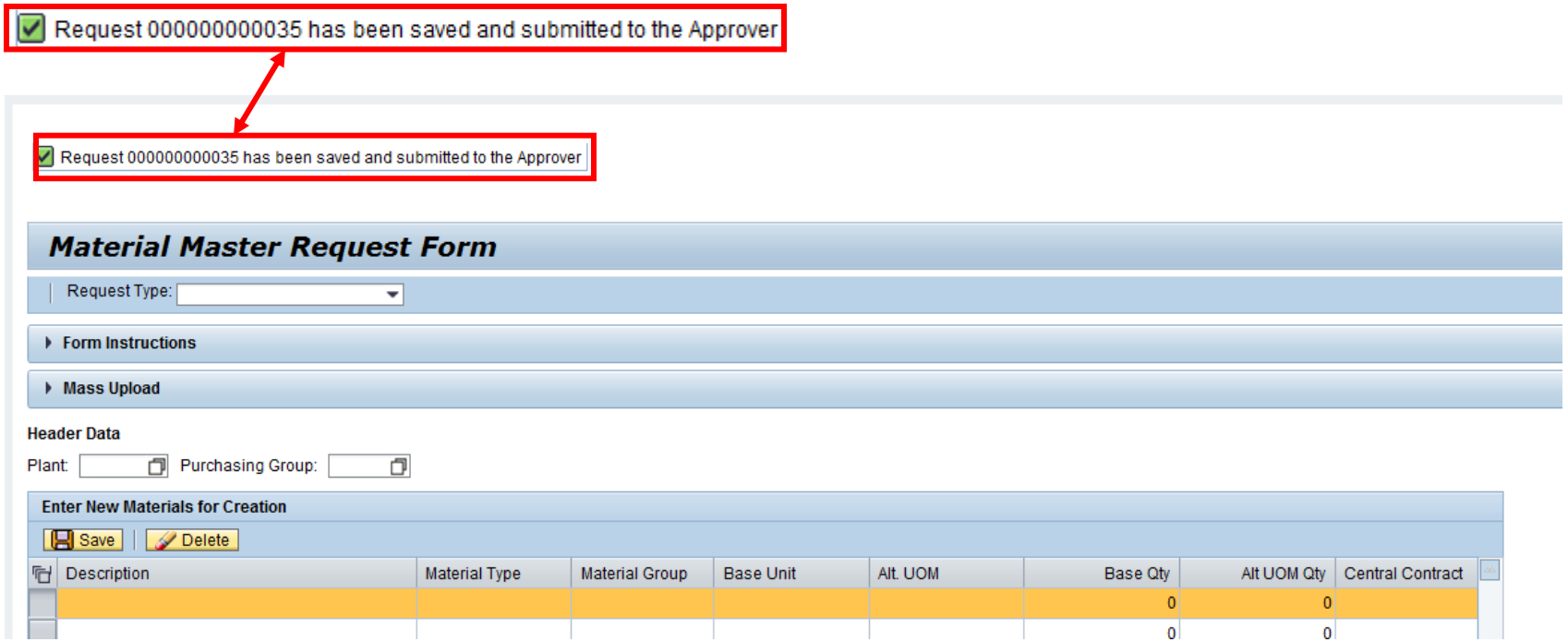
IMPORTANT:

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.

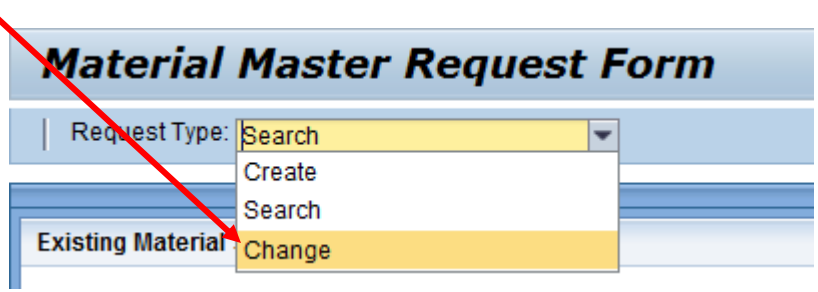
NOTE:

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.
.

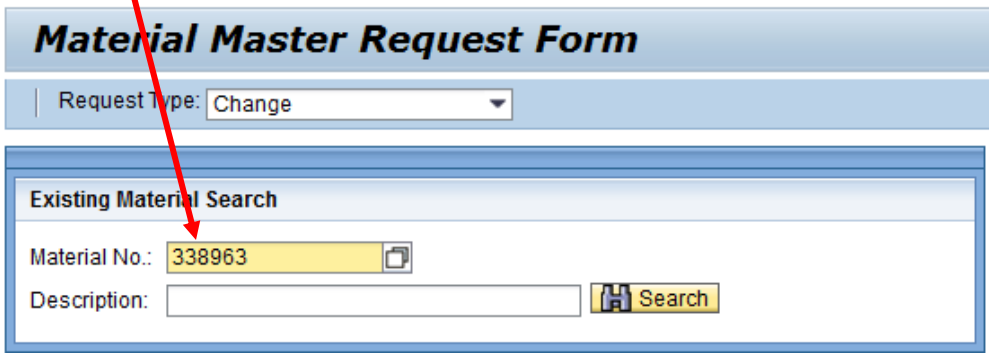


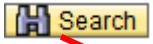
REQUEST A CHANGE TO A MATERIAL

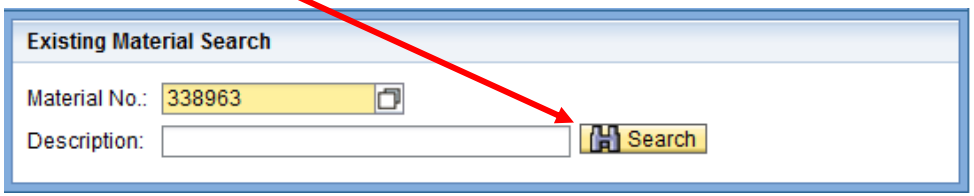
Select **Change** from the drop down menu



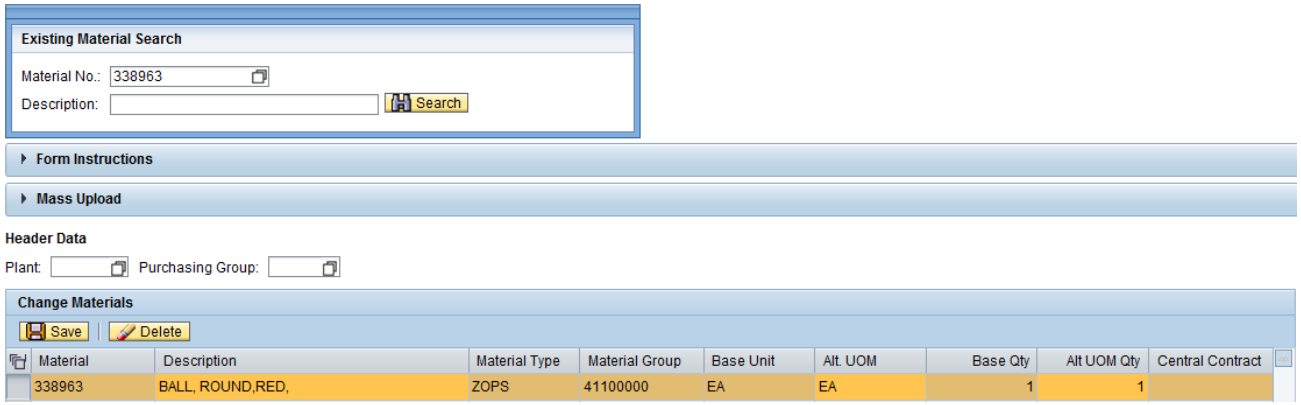
Enter the **Material Number** of the item you would like to have changed or utilize the search function.



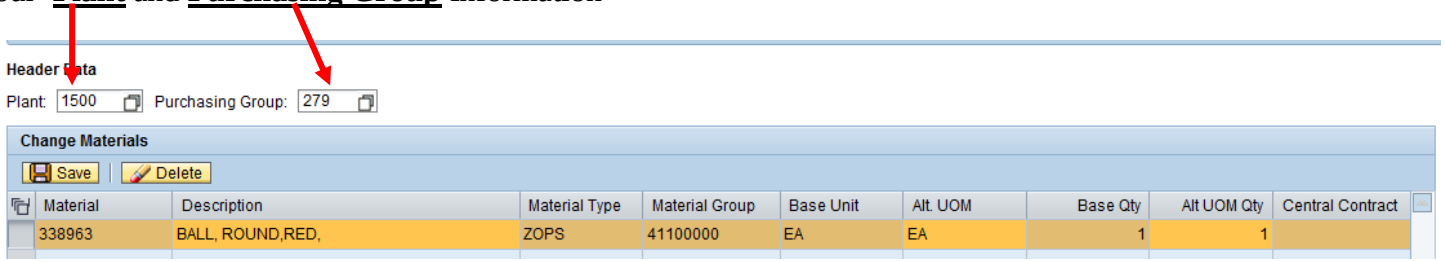
Click on the **Search**  button.



The material information will display

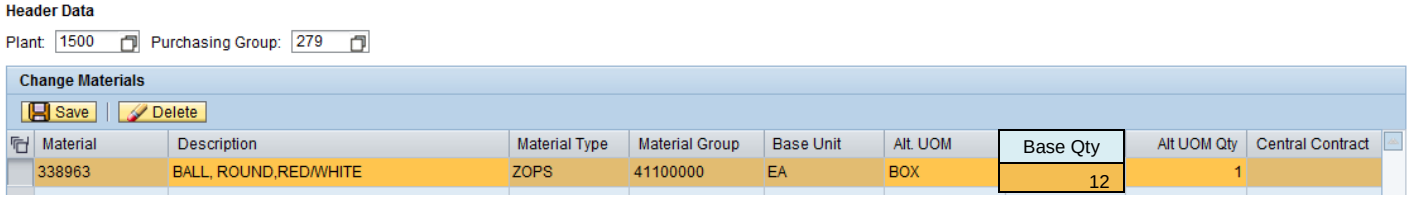


Enter your **Plant** and **Purchasing Group** Information

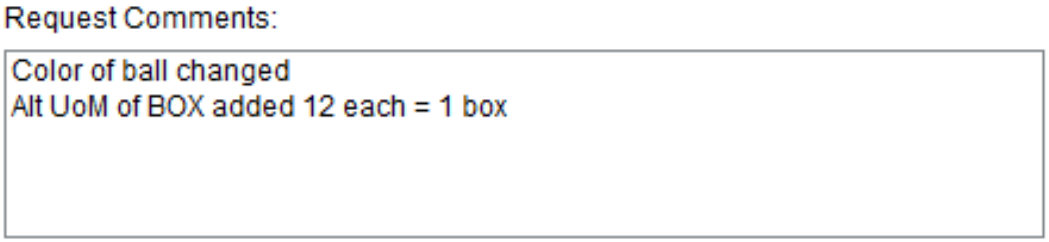


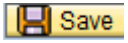
Click in the area you want to change

Make your changes



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



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 with 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
  -- Gerry Grecek, QA Specialist, ggrecek@pa.gov, (717) 783-1161
  -- Bill Hugendubler, QA Specialist, whugendubl@pa.gov, (717) 525-5343
  -- Brian Vulgaris, QA Specialist, bvulgaris@pa.gov, (717) 214-9506