

STO 124 Requesting Stock Items from Product Store (Chem Students)

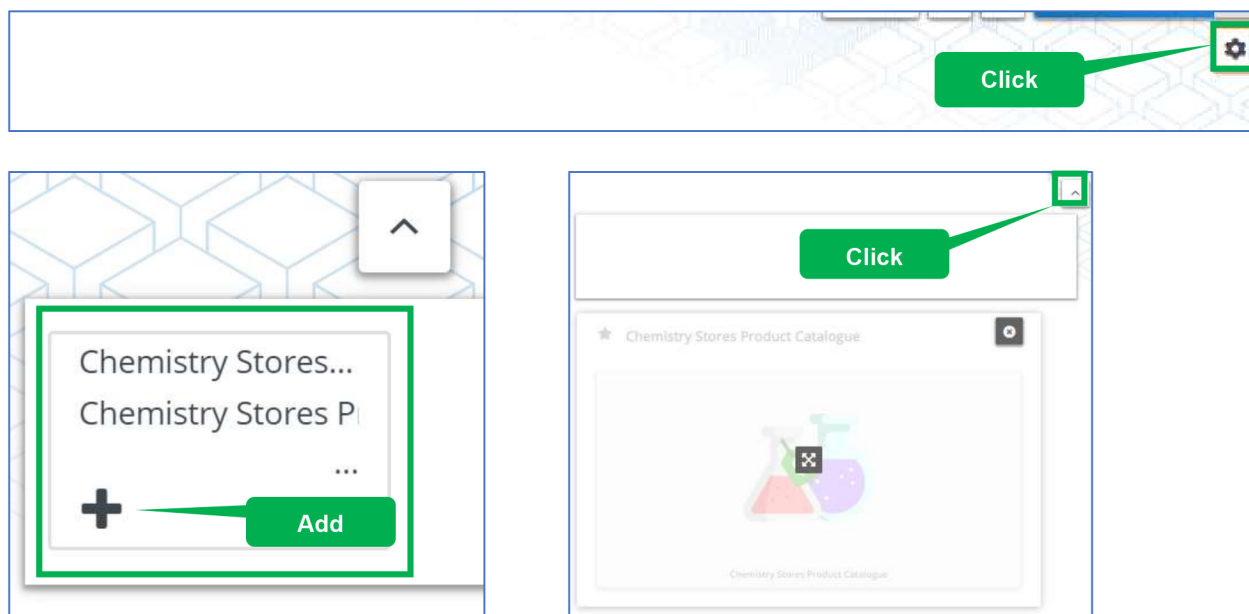
Navigation: Home Screen Planon > 'Chemistry Stores Product Catalogue' Gadget

Planon Step-by-Step Instructions

Step 1 – Click 'Edit mode' icon, to add Product Store to Homepage.

If the Product Store is not visible on the Home Page, it must be added by locating it via 'Edit mode' & Clicking '+' beneath 'Chemistry Stores Product Catalogue'. Once it has been added Click on the 'Close edit mode' icon.

Note: This is only required the first time Requestor logs in.



Step 2 – Click on the 'Chemistry Stores Product Catalogue' Gadget.

The 'My requisitions' screen will present all Orders created for the Chemistry Stores Warehouse by the Requestor who is logged in. Each Order will detail the following:

- **Number** - Order # which is to be provided to the Chemistry Stores Employee when collecting items at Store. They will use this # to locate Order.
- **Description** - Will detail the description of the Order submitted which will be detailed at **Step 7**.
- **Delivery Address (Ship to Address)** - This will always be 'CHEM-Room B170, Chemistry Stores Warehouse'. See **Step 7** for more detail.



- **Start Date & time** - Preferred date & time which Requestor would like to collect the Products requested. See **Step 7** for more detail **Note:** This is a preferred collection time; however, this is only a suggestion to Stores Employees, and not a guarantee Products will be ready for pickup at this time.
- **Status** - Status of Order. Statuses for Orders include the following:
 - *Reported:* Order has been submitted, but not seen or actioned by the Chemistry Store yet. While in the 'Reported' status, Order can still be Cancelled or Edited. (See **Step 9** for detail)
 - *Accepted:* The Store have reserved the items for Requestor, and are preparing Order. **Note:** An email will be sent to Requestor once Order is ready for pickup (See **Step 10**).
 - *Technically Complete:* Order has been received by Requestor.

Note: At any point the Requestor can click on an Order to see a summary of Product Requested, Quantities & Prices & print a copy of confirmation.

My requisitions

Number	Description	Delivery address (Ship to Address)	Start date & time	Status
529.00	Product Requisition CHEM	CHEM-Room B170, Chemistry Stores Warehouse	06/08/2020 09:34	42, Accepted
668.00	Product Requisition CHEM	CHEM-Room B170, Chemistry Stores Warehouse	12/08/2020 13:31	44, Technically completed
721.00	Product Requisition CHEM	CHEM-Room B170, Chemistry Stores Warehouse	13/08/2020 15:47	42, Accepted
724.00	Product Requisition CHEM	CHEM-Room B170, Chemistry Stores Warehouse	13/08/2020 16:39	42, Accepted

Chemistry Stores Product Catalogue

Step 3 – Click on 'Chemistry Stores Product Catalogue'.

Requestor will be directed to a full list of Products which can be requested from the Chemistry Stores, which are displayed in alphabetical order.

My requisitions

Number	Description	Delivery address (Ship to Address)	Start date & time	Status
529.00	Product Requisition CHEM	CHEM-Room B170, Chemistry Stores Warehouse	06/08/2020 09:34	42, Accepted

Chemistry Stores Product Catalogue

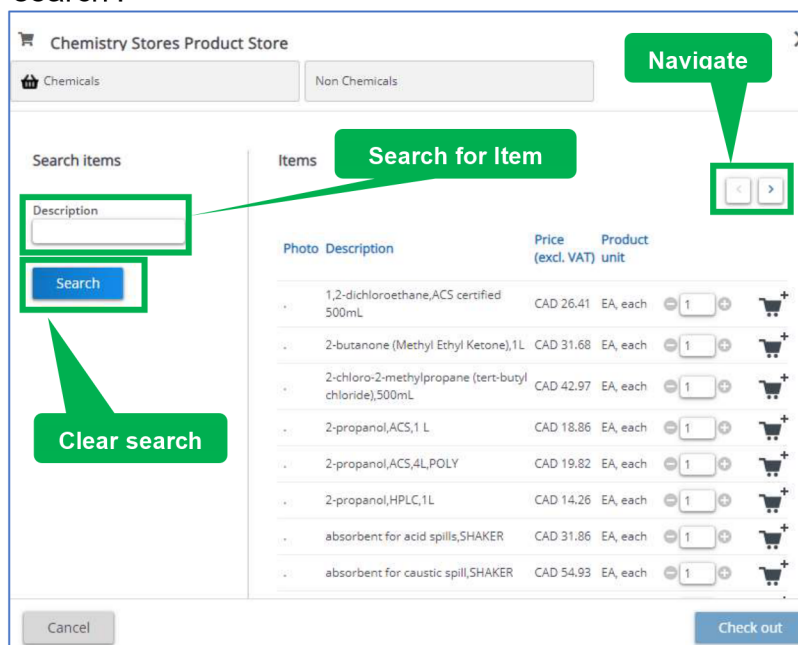


Step 4.0 – Search by Product by Description

In the 'Description' search field, search for Product by any key word which is in the Description. Using the example, '2-butanone (Methyl Ethyl Ketone), 1L', search for the Product using: '2', or, 'butanone', or 'Methyl', etc. or any combination of those words, by inserting '%' between each key word. Example 'butanone%methyl' which locate '2-butanone (Methyl Ethyl Ketone), 1L'.

Navigate through Products using the < (left arrow) or > (right arrow).

Note: To clear search, and return it to full list of Product, empty the search field & click 'search'.



Step 4.1 – Click on the Product Category, to filter list the list by chosen category.

To filter the entire list by a Category of Products, example, 'Compressed or Cryogenic Gases', select 'Chemical' & the sub-category of 'Compressed or Cryogenic Gases'. Only Products associated with the chosen Category will be visible.

Navigate through Products using the < (left arrow) or > (right arrow).

Note: To remove the Category filter, click 'All Categories' underneath the Product Category names.



Chemistry Stores Product Store

Chemicals Non Chemicals

Choose Category

Photo	Description	Price (excl. VAT)	Product unit	
	1,2-dichloroethane,ACS certified 500mL	CAD 26.41	EA, each	- 1 +
	2-butanone (Methyl Ethyl Ketone),1L	CAD 31.68	EA, each	- 1 +

Chemistry Stores Product Store

Chemicals Non Chemicals

All categories Chemicals > Compressed or Cryogenic Gases

Click to clear category filter

Search items

Description

Search

Photo	Description	Price (excl. VAT)	Product unit	
	air,compressed (AIBR-K),USP	CAD 50.22	EA, each	- 1 +

Step 5 – Click on the Product under ‘Items’ to view availability.

Search items

Description

Search

Click Product

Photo	Description	Price (excl. VAT)	Product unit	
	air,compressed (AIBR-K),USP	CAD 50.22	EA, each	- 1 +
	nitrogen (NI-T),99.995%	CAD 21.62	EA, each	- 1 +

Check if quantity desired is available in stores by looking at the quantity below ‘free available’.



Product details

Code GS64230T

Description nitrogen (NI-T),99.995%

Price (excl. VAT) CAD 21.62

Comments

Stock information

Code	Name	Quantity - in stock	Free available stock
GS64230T	nitrogen (NI-T),99.995%	10	10

[Check out](#) [Back to store](#)

Price per unit

Quantity available

Note: If the quantity required is not available, it can still be requested, but there will be a longer delay before it is ready for pickup.

Step 6 – Select the Quantity desired & add to Cart.

To add the desired quantity, click the '+' beside the shopping cart icon & it will increase the quantity. To decrease, click '-'.

The quantity can also be entered directly into the quantity field.

Note: To add the Product & Quantity to your shopping cart, click on the shopping cart icon.

If this is the only Product being requested, click 'Check out' & proceed to Step 6.

If Products are required, Click 'Back to Store' & follow Steps 3-5 again.



Product details

Code: GS64230T
Description: nitrogen (NI-T),99.995%
Price (excl. VAT): CAD 21.62
Comments:

Adjust Quantity

Add to Cart

Proceed to checkout

Continue Shopping

Check out **Back to store**

Stock information

Code	Name	Quantity - in stock	Free available stock
GS64230T	nitrogen (NI-T),99.995%	10	10

Quantity: 1

Step 7 – Review Product added to Shopping Cart, & adjust if necessary.

On checkout screen, review each Product, Quantity, & total price before submitting Order. If Order is correct, proceed to **Step 8**.

If changes are required, the Requestor can do any of the following:

- **Delete requisition line:** Click the trash can which will remove it from your order.
- **Increase/decrease quantity requested:** Click '+' to increase, or '-' to decrease.
- **Add new Products:** Click 'Add Products' to back to Product Catalogue.

Add product requisition

Requisition lines

Add Products

Delete Product

Adjust Quantity

Name	Price excl. VAT	Quantity	Total costs excl. VAT
absorbent for acid spills,SHAKER	CAD 31.86	2	CAD 63.72
nitrogen (NI-T),99.995%	CAD 21.62	2	CAD 43.24

Total excl. VAT: CAD106.96

Add products

Requisition

* Requestor: 5757886 Patrick O'Connell

Cost centre: CC00965, Administration and Operations | Faculty of Science
Department: Research | Bertram Lab | Department of Chemistry | Faculty of Science
Property: VBL10328, Chemistry Building (CHEM)
Phone number:



Step 8 – Review & Populate all Mandatory fields & submit.

Note: Mandatory fields are denoted with a red * to the left of the field description.

Mandatory fields should be populated as follows:

- **Requestor:** Populated with Requestors Person ID & Name. The Requestor cannot request on behalf of someone else.
- **Property:** Auto-populated to the property linked to Person record.
- **Description:** Auto-populated to 'Product Requisition Chem'. Populate with a unique identifier so Request can locate in future. For example, Project name.
- **Comments:** Enter any additional instructions or comments needed to bring to the attention of the Stores Employee.
- **Start date & time:** This field will auto-populate to the following day. Please enter the preferred date & time for collection of order. **Note:** The date entered cannot be a weekend, if it is, an error message will appear when submitting & will be forced to change to a weekday. The date & time entered are **not** a guarantee the Order will be ready for that date & time.
- **Delivery Address (Ship to Address):** This field will be auto-populated to 'CHEM-Room B170, Chemistry Stores Warehouse'. If another delivery address has been populated here, please change to 'CHEM-Room B170, Chemistry Stores Warehouse' by clicking on the blue square on the right of the field.

The screenshot shows the 'Requisition' form with the following fields and annotations:

- Requestor:** 5757886 Patrick O'Connell. A green box labeled 'Unique identifier' points to the ID number.
- Cost centre:** CC00965, Administration and Operations | Faculty of Science
- Department:** Research | Bertram Lab | Department of Chemistry | Faculty of Science
- Property:** VBL10328, Chemistry Building (CHEM)
- Phone number:**
- Property:** University Services Building (USB)
- Description:** Chem Module: CHE-0125. A green box labeled 'Additional Instructions' points to the text 'Required as soon as possible please for project due next week.' in the comment field.
- Comment:**
- Delivery:**
- * Start date & time:** 05/09/2020 09:39. A green box labeled 'Preferred collection date' points to the date and time.
- * Delivery address (Ship to Address):** CHEM-Room B170, Chemistry Stores Warehouse

Step 9 – Enter correct authorised cost center, to charge order to.

- **Cost Center:** The cost center (speed chart) associated with the Requestors Person Record will be auto-populated here. **Note:** This field needs to be populated with the Cost Center (speed chart) the Requestor is charging to. If they have multiple cost centers which they can charge to, for example, they are part of multiple projects, research studies, grad programs etc., please select the correct



cost center in this field. Do so by clicking on the blue box beside field, & searching for the cost center by code or description.

- **Customer Account Info:** Enter Person ID which is populated in the Requestor field. This will return each cost center (speed chart) which the Requestor is authorized to charge to. If there are multiple for the Requestor, choose the one they wish to charge this order to.
- **Note:**
 - The Cost Center code in the **Customer Account Info** field **must** match the code chosen in the **Cost Center** field.
 - If no record is returned for your name or employee ID, please contact the Chemistry Stores to set you up with the correct Authorization.

The screenshot shows a 'Requisition' form with the following fields and values:

- Requestor:** 5757886 Patrick O'Connell
- Cost centre:** CC00965, Administration and Operations | Faculty of Science
- Department:** Research | Bertram Lab | Department of Chemistry | Faculty of Science
- Property:** VBL10328, Chemistry Building (CHEM)
- Phone number:**
- Property:** University Services Building (USB)
- Description:** Chem Module: CHE-0125
- Comment:** Required as soon as possible please for project due next week.

Below the Requisition section is the **Delivery** section:

- Start date & time:** 05/09/2020 09:39
- Delivery address (Ship to Address):** CHEM-Room B170, Chemistry Stores Warehouse
- Cost centre:** Administration and Operations | Faculty of Science
- Customer Account Info:** CC00979 5757886, Patrick O'Connell

At the bottom are 'Submit' and 'Cancel' buttons.

Two green callout boxes provide instructions:

- A box pointing to the 'Cost centre' field in the Delivery section says: **Cost center must match Customer Account Info**
- A box pointing to the 'Customer Account Info' field in the Delivery section says: **Search by Person ID**

Step 10– Review Order & Personnel details, & submit.

An Order Confirmation screen will appear showing the Order #, example, 101.00. Keep a record of this # or print the confirmation screen.

The Order is now in the 'Reported' status, which means it has not been received yet. If changes are required, proceed to **Step 11**.



Product requisition details ✕

Order #

Print

✓

Thank you! Your requisition with requisition number 140,00 has been submitted.

Requisition lines

< >

Name	Price excl. VAT	Quantity	Total costs excl. VAT
absorbent for acid spills,SHAKER	CAD 31.86	2	CAD 63.72
nitrogen (NI-T),99.995%	CAD 21.62	2	CAD 43.24
Total excl. VAT:			CAD106.96

Requisition

Requestor

5757886 Patrick O'Connell

Property

Chemistry Building (CHEM)

Description

Chem Module: CHE-0125

Comment

Required as soon as possible please for project due next week.

Delivery

Start date & time

Saturday, 5 September 2020 09:39

Edit

Ok and close

Step 11 – Edit or Cancel Order.

Open the Product Store Gadget, & select the Order from the 'My requisitions' screen
Step 2.

To **Edit**: Click 'Edit' & follow Step 6-8.

To **Cancel**: Click 'Cancel this requisition'. Confirm the cancellation. Click 'Continue' if you this is your final decision. Once cancelled, you will not be able to re-open the order, and will have to start over from Step 1.

Step 12 – Receive notification & collect order.

Once your Order has been accepted by the Chemistry Stores, & it has been marked as ready for pickup. You will receive an email notification notifying you to pickup your Order.