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.

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• **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.

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**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.

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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-butane (Methyl Ethyl Ketone), 1L’, search for the Product using: ‘2’, or, ‘butane’, or ‘Methyl’, etc. or any combination of those words, by inserting ‘%’ between each key word. Example ‘butane%methyl’ which locate ‘2-butane (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.
Step 5 – Click on the Product under ‘Items’ to view availability.

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

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.

**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**.
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.