

# I.Inventory

Note: Objectives:

1. To understand how to receive materials
2. To understand how to change material's status and who has authority
3. To add material inventory needed for the training project
4. Overview of material use screen

## A. Material Receipt:

1. **SAY:** Click the + icon next to Inventory in the main Menu to open the sub-menus. Click on the Material Receipt menu. Now you are on the Material Receipt screen. All the items that you requisitioned will show up on this list. When the material is received and processed through this function, it will disappear from this list and will appear on the next Inventory screens. When a material arrives at your facility, you can come to this menu to receive it.
2. Click the update icon next to the Training Liquid. I'll go through the fields on this screen before you start using it.
  - The Receipt Number is assigned when the material is requisitioned.
  - The Part # was assigned by the system when the material was created.
  - The Material Name is what you used to first enter the material into the system.
  - The Material Id is blank for now. This is something you would have entered from your own internal material numbering system when the material was created.
  - The Version Number is the specifications version that you selected when you requisitioned the material.
  - The Vendor Name and Vendor # come from your selection and entries when you created the requisition. If you requested an MSDS on your requisition, the MSDS Required box will be checked. If you receive an MSDS you can check the MSDS Received box. Likewise, for the COA Req. and COA Received boxes. The Quantity Ordered will show how much was ordered in what unit. Below this you can enter the amount received in the quantity. Received field. Always make sure to select the correct unit. You will enter the Vendor Lot Number and the Date Received. The Use by date is optional.
3. If you have any paperwork that came in with the material like a COA, you can attach it to this record. Once the form is completed, you will sign it with your digital signature. This will remove the material from the receipt screen and it will appear on the next inventory screens.

4. Enter the following information into this screen. Click the COA Received box to indicate that a Certificate of Analysis was received. Enter the Quantity Received as 30 and the unit as Liter. The Vendor Lot # is Training-1 and the Date Received is today's date. Click the Sign button and enter your credentials. Click Confirm to complete your signature and Confirm on the Receipt screen to complete this receipt. This will take you to a summary screen where you can print a label for this material.

Note: Demonstrate a material label being printed.

5. Click on the Material Receipt menu, select the update arrow next to 1 oz. Amber Bottle and then enter the following information. Click the MSDS Received check box. Enter the quantity received as 1,000, the unit as ea., the Vendor Lot # is Training-2, and the Date received is today's date. Click the Sign button and enter your digital signature. Click confirm on the Receipt screen to see the summary.
6. Now we can take a look at some of the other inventory screens.

## B. Inventory Status

7. SAY: Click on the Inventory Status menu item. The Inventory Status screen shows all the received materials and their statuses such as Quarantine or Approved. When each material is received and goes into inventory, it is given a default status of "Quarantine".
8. Use the scroll bar at the bottom if you need to see the rest of the table. We are going to need to change the status of both raw materials to "Approved." If we don't do this, the raw materials cannot be used in batch manufacturing. Only a person with the Quality Manager role can change a status. Project Manager has to log out and then the Quality Manager has to log in. Project Manager – please log out now and Quality Manager – please log in.

Note: Give the trainees time to log out and log back in.

9. SAY: Quality Manager – please click the Inventor Status menu item and then select the update arrow for the "Training Liquid. If you try to get to this page while in the PM role you will see the message "you are not authorized."
10. Select the drop status down and select "Approved". This opens a new signature popup for extra security. Sign and confirm. You can then enter comments such as "all tests pass, see attachments," you can attach COAs, results, etc. or you can enter a Use by date. Select confirm at the bottom of the screen to complete this transaction.

11. Now do the same process for 1 oz. Amber Bottle and change the status to Approved. Select the update arrow for 1 oz. Amber Bottle. Select Approved from the drop down box and sign with your credentials. Now press Confirm.
12. Click the Inventory Status menu. Find the Print icon next to Training Liquid. This will let you create a material label with a bar code. Click the icon now to see a print preview of the label. When you bar code scan this label from the Inventory Status screen, it will bring you directly to the screen where you can update the status.
13. At this point we need to change the roles again. Quality Manager – please log out. Project Manager – please log in.