Inventory Maintenance - BWH3000

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Warehouse > Maintenance > Inventory Maintenance

This page allows you to establish a file of items available through the district warehouse. When campuses submit stock item requisitions, they must specify the desired items by entering the inventory ID numbers of those items. Those ID numbers must correspond to the item numbers in the inventory records established on this page.

Add or update inventory records:

Add	Add an item. Click to add a new inventory item.	OR	**Retrieve an existing record**	Search for a record. Type the **Item Number** and click **Retrieve**. Type an inventory **Item Description**. As you type the data, a drop-down list of corresponding data is displayed. Select the item you wish to select and click **Retrieve**. Click **Directory**. To search for a specific item, type data in one or more of the search fields. Click **Search**. A list of inventory items that match the search criteria is displayed. Select an inventory item from the list. Otherwise, click **Cancel**.

Field	Description
Item Number	Type an item number to represent the new inventory item. Leading zeros are not required. This field can be a maximum of six alphanumeric characters. If the item number is alphanumeric, the field is not zero-filled. If you retrieved an existing record, this field is display only. When using alphanumeric item numbers, the **Auto Assign Inventory Item Number** field must be unselected on the Warehouse > Tables > Warehouse Options page.
Item Description	Type the “internal use” description of the inventory item. This description is printed on the shipping order. The description can be a maximum of 30 characters.
Long Description	Type a more detailed description of the inventory item. This description is often the official item name needed by the vendor. The description can be a maximum of 200 characters.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Catalog Number</td><td>Type the catalog number from which the item may be purchased. This field can be a maximum of 16 digits.

An association between the catalog number and the item number is established.

If an association exists between the catalog number and the item number, the catalog number is displayed on other pages when the item number is entered.

Not every item number has an associated catalog number.</td></tr>
<tr><td>Reorder Level</td><td>Type the level of warehouse inventory at which the item should be reordered. This number is represented in units of issue. For example, if your reorder level for paper is 10, that means your LEA would need to place a reorder for paper when there are 10 cases of paper left in your warehouse stock.
You can generate the Warehouse > Reports > Warehouse Reports > BWH1100 - Reorder Report to view a list of warehouse items with additional reorder information.</td></tr>
<tr><td>Reorder Quantity</td><td>Type the quantity of the item to be ordered when placing a reorder. This number is represented in units of issue (e.g., cases of paper).</td></tr>
<tr><td>Quantity on Hand</td><td>Type the total quantity of this item on hand at all LEAs.</td></tr>
<tr><td>Free Item</td><td>Select to indicate that the item has no cost. Otherwise, leave the field blank.

If selected, the Unit Cost field is disabled.

A free item needs to have a different item number if the same item is also available at a cost.</td></tr>
<tr><td>Unit Cost</td><td>Type the dollar value which represents the cost of one unit of issue of the item. This number is used to compute the total cost for a campus stock requisition.</td></tr>
<tr><td>Unit of Issue</td><td>Click ⌄ to select the unit on which the unit price is based such as each, case, box, etc.</td></tr>
<tr><td>Category Code</td><td>Click ⌄ to select a five-character code to indicate any district-defined categorization.</td></tr>
<tr><td>Capital Outlay</td><td>Select to indicate that the item is a capital outlay item. Otherwise, leave the field blank.</td></tr>
<tr><td>Audit Reason</td><td>Type the reason the inventory item is being added, deleted, or updated. This field is displayed when a new item is added or deleted, or when the Quantity on Hand or Unit Cost field is updated. This is a required field.</td></tr>
<tr><td>Used to Date</td><td>The number (units of issue) of this item ordered from the warehouse to date is displayed.</td></tr>
<tr><td>Last Requested</td><td>The most recent date on which an order was submitted for this item is displayed.</td></tr>
<tr><td>Back Ordered</td><td>The total number of units of issue of this item which have been back-ordered is displayed.</td></tr>
<tr><td>Last Restock</td><td>The most recent date on which an item was restocked is displayed.</td></tr>
<tr><td>Last Restock PO Nbr</td><td>The last purchase order number that was issued for the item restock order is displayed.</td></tr>
<tr><td>Inventory Location</td><td><table>
<tr><td>Location Description</td><td>Type a detailed description of the location where the item is stored.</td></tr>
<tr><td>Aisle</td><td>Type the aisle where the item is stored. The field can be a maximum of three characters.</td></tr>
<tr><td>Bin Code</td><td>Type the bin code where the item is stored. The field can be a maximum of four characters.</td></tr>
</table></td></tr>
</table>

Click **Save**.

Other functions and features:

Delete	Delete the inventory record. A message is displayed asking you to confirm the item deletion. Click **Yes** to delete the inventory item number. Click **No** to not delete the inventory item number. **Note**: An **Audit Reason** must be entered when an item is deleted, and you must click **Delete** again.
Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Documents View or attach supporting documentation.

Document Attachments

The Document Attachments feature allows you to upload and view documents by application, school year, folder, and document type. **This feature is not available in all districts.**

If you are logged on as a user assigned to a Document Attachments-enabled role, the **Documents** button is displayed on various pages in the ASCENDER Business system. If a document is attached, the **Documents** button displays a note icon.

If you have full access, you can upload and download files. If you have read-only access, you can download existing files, but you cannot upload files. Some pages contain read-only files.

If you are logged on with a role that does *not* have security access to Document Attachments, the **Documents** button is *not* displayed on any pages.

Document Attachment-enabled pages

Application	Menu	Folder	Document Type
Accounts Receivable	Tables > Customer Information	Customers	Other
Accounts Receivable	Maintenance > Create/Modify Invoice	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Approval	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Voids/Adjustments (read-only)	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Inquiry/Customer Notes > Inquiry	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Status Inquiry (read-only)	Invoices	Invoices
Asset Management	Maintenance > Inventory Maintenance	Asset	Other, Warranty
Bank Reconciliation	Maintenance > Bank Reconciliation	Reconciliation	Reconciliation
Finance	Maintenance > Vendor Information	Vendor Vendor Catalog	Bid Contract Other Quote Setup Form Sole Source W-9 Catalog
Finance	Maintenance > Postings > Journal Budget	Journal Entry	Journal Entry
Finance	Maintenance > Postings > Journal Inquiry	Journal Entry	Journal Entry
Finance	Maintenance > Postings > Purchase Order	Encumbrances	Encumbrances
Finance	Maintenance > Postings > Cash Receipt	Cash Receipt	Cash Receipt
Finance	Maintenance > Postings > Credit Memo	Invoices	Invoices
Finance	Maintenance > Postings > Check Processing - PA	Invoices	Invoices
Finance	Maintenance > Postings > Check Processing - PO	Invoices	Invoices
Finance	Maintenance > Postings > Journal Actual	Journal Entry	Journal Entry
Finance	Maintenance > Pending Payables	Purchasing - Requisition Finance - Invoices	Purchasing - Receiving Finance - Invoices
Finance	Maintenance > Credit Card > Posting - PA	Invoices	Invoices
Finance	Maintenance > Credit Card > Posting - PO	Invoices	Invoices
Finance	Inquiry > GL Inquiry > GL Inquiry (read-only)	Accounts Receivable - Invoices Finance - Journal Entry Finance - Encumbrances Finance - Cash Receipt Finance - Invoices Purchasing - Requisition	Accounts Receivable - Invoices Finance - Journal Entry Finance - Encumbrances Finance - Cash Receipt Finance - Invoices Purchasing - Receiving
Finance	Inquiry > Vendor Inquiry > Vendor PO Inquiry (read-only)	Encumbrances	Encumbrances
Finance	Inquiry > Vendor Inquiry > Vendor Payment Inquiry (read-only)	Invoices	Invoices
Finance	Inquiry > Travel Reimbursement Inquiry (read-only)	TRVL	Other
Finance	Budget Amendment > Budget Amendment Maintenance	BAR	Other
Finance	Budget Amendment > Approve Budget Amendment	BAR	Other
Finance	Budget Amendment > Budget Amendment Inquiry (read-only)	BAR	Other
Grants and Projects	Maintenance > Member Grants > Grant Maintenance	NOGA	Other
Grants and Projects	Maintenance > Member Grants > Object Maintenance	NOGA	Other
Grants and Projects	Maintenance > Approval Dashboard	Budget Reimburse	Other Other
Personnel	Maintenance > Staff Demo > Demographic Information	Demographic	Application, Driver License, I-9, Other, Resume, SSN Card
Personnel	Maintenance > Staff Demo > Credentials	Credentials	Certification, Education
Personnel	Maintenance > Staff Demo > Verification	Verification	Contract, Signed Agreement
Personnel	Maintenance > Staff Demo > Service Record	Service Record	Service Record
Payroll	Maintenance > Staff Job/Pay Data	Payroll	Deduction, Other, W-4
Payroll	Maintenance > Leave Account Transaction > Staff Leave Maint	Leave	Leave
Payroll	Maintenance > Leave Account Transaction > Leave Adjustment	Leave	Leave
Payroll	Maintenance > Leave Account Transaction > Employee Substitute	Leave	Leave
Purchasing	Maintenance > Vendor Order Addresses (read-only)	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Create/Modify Requisition Vendor Directory (read-only)	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Create/Modify Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Create/Modify Contract Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Approve Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Bundle Requisitions (read-only)	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Receiving	Receiving	Receiving Invoice
Purchasing	Inquiry > Requisition Status Inquiry	Requisition	Supporting Forms, Vendor Documents
Purchasing	Inquiry > Contract Requisition Status Inquiry	Requisition	Supporting Forms, Vendor Documents
Purchasing	Next Year > Maintenance > Create/Modify Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Next Year > Maintenance > Create/Modify Contract Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Next Year > Maintenance > Approve Requisition	Requisition	Supporting Forms, Vendor Documents
Warehouse	Maintenance > Inventory Maintenance	Items	Other

List of permissible file types

File Extension	Document Type
.doc	application/msword
.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document
.gif	image/gif
.jpeg	image/jpeg
.jpg	image/jpeg
.pdf	application/pdf
.png	image/png
.pps	application/vnd.ms-powerpoint
.ppt	application/vnd.ms-powerpoint
.pptx	application/vnd.openxmlformats-officedocument.presentationalml.presentation
.tif	image/tiff
.tiff	image/tiff
.txt	text/plain
.xls	application/vnd.ms-excel
.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

Notes:

- There is a 10MB maximum upload size.
- All changes made in the Document Options window are saved when you close the window. You do not have to click Save after you close the dialog box.

Upload or view documents:

Under **Document List:**

Field	Description
Application	The application you are currently logged on to is displayed (e.g., Finance).
Folder	Select the folder for which you want to view or attach a document. Different types of documents must be uploaded to specific folders. Changing the folder will change the document type options in the **Select Type** field.

Existing documents are displayed according to specified criteria.

Under **Document Upload:**

Field	Description
Select File to Upload	Click **Choose File**. Locate and select the document on your computer or network. The file name is displayed next to **Choose File**.
Select Type	Select the type of document you are uploading. The list varies according to your selection in the Folder field.
Description	Type an optional description of the document.
Upload File	Click to upload the file. • The document is listed in the **Document List** section. • The date-time stamp and user ID display the date and time the document was uploaded and the user ID of the user who uploaded the document.

Other Functions and Features:

Type	Click the link in the **Type** column to download the file to your computer to view it.
Choose File	Click again to add another document, and repeat the steps for uploading a document.
	Click to delete the document from the record. You are prompted to confirm that you want to delete the document.

NOTES

- Deleted documents are not actually deleted from the Document Attachments server. You can retrieve deleted files using the Document Attachments File Recovery utility in District Administration.
- If a user deletes a requisition from the Purchasing > Maintenance > Create/Modify Requisition or Create/Modify Contract Requisition pages, the attached documents are deleted.
- Only users who are approvers can upload documents for a requisition on the Purchasing > Maintenance > Approve Requisition page.
- If a user uses the Purchasing > Utilities > Mass Delete Requisition Records page to delete requisitions, all associated document attachments are deleted.