



CREATE AND MANAGE MOVEMENT REQUESTS

INV

QUICK REFERENCE GUIDE INV-19

Purpose

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step explanation of how to Create and Manage Movement Requests in the North Carolina Financial System (NCFS).

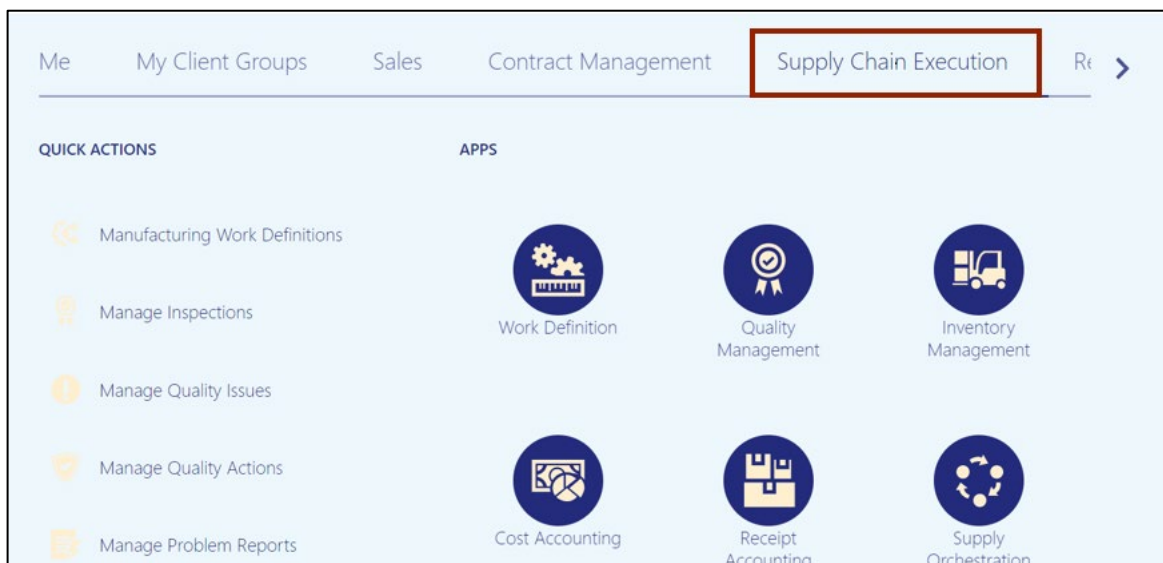
Introduction and Overview

This QRG covers the procedure of creation and management of movement requests in NCFS which will enable you to create movement requests.

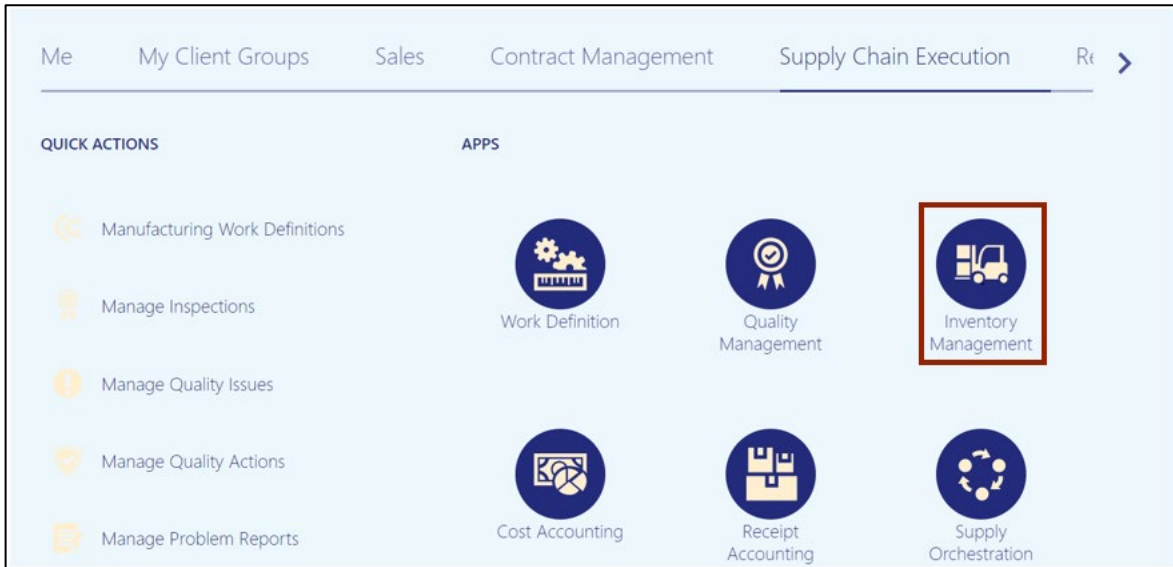
Create Movement Requests

To create movement requests in NCFS, please follow the steps below:

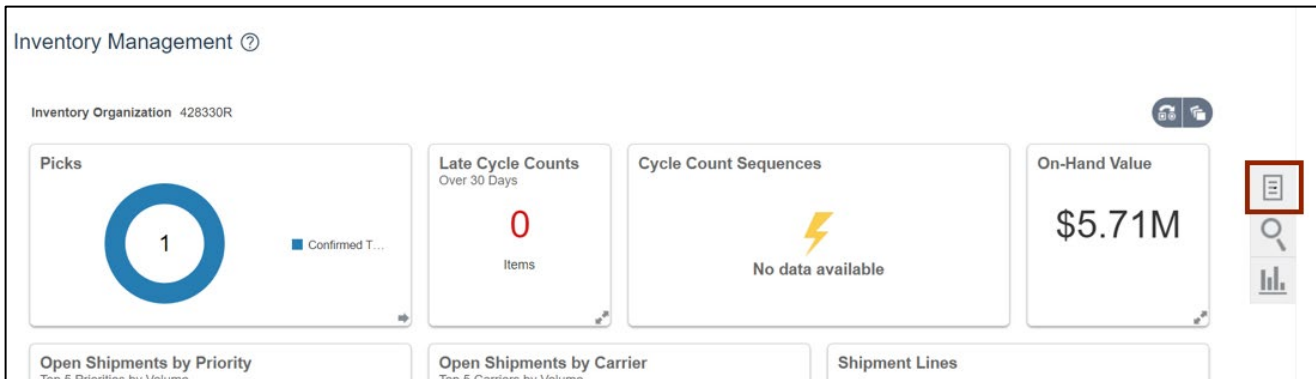
1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **Supply Chain Execution** tab.



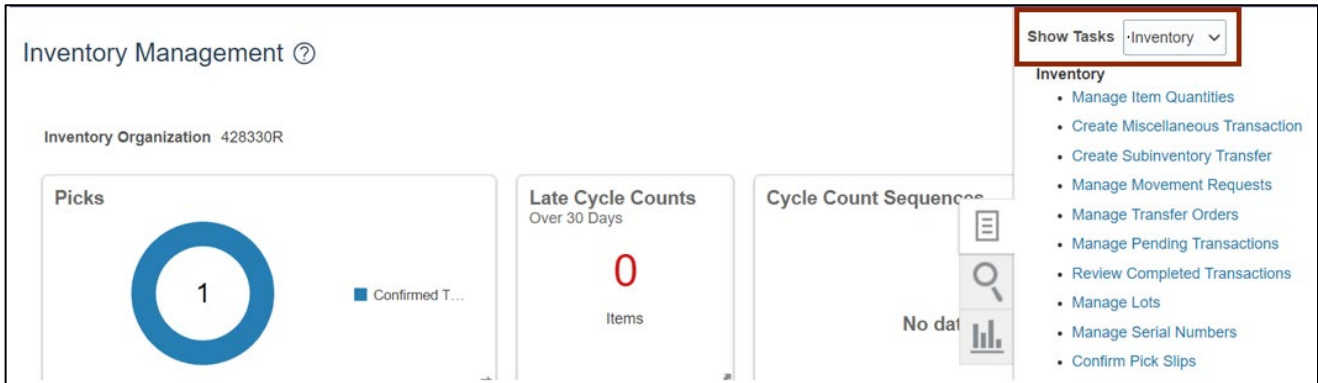
3. Click the **Inventory Management** app.



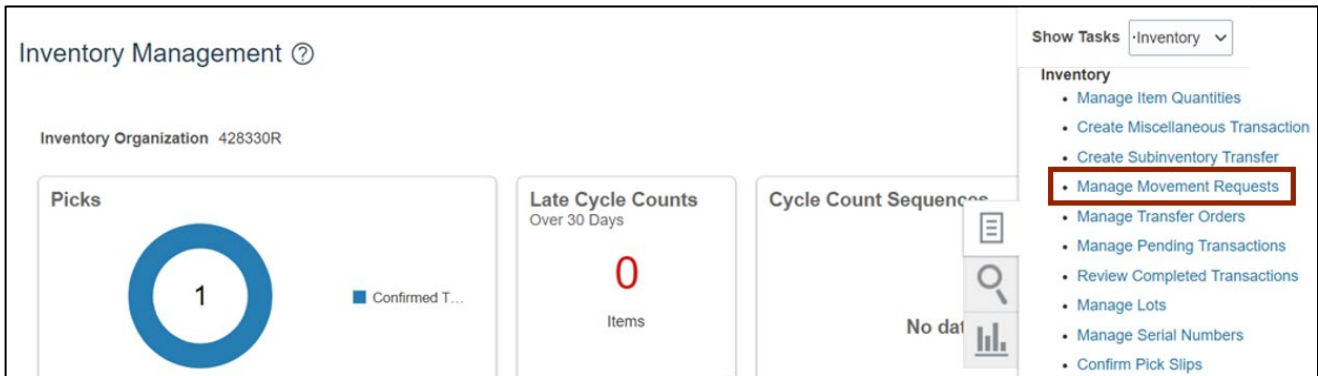
4. On the **Inventory Management** dashboard, click the **Tasks** [] icon.



5. Click the *Show Tasks* drop-down choice list, then select **Inventory**.



6. Click **Manage Movement Requests**.



- The **Manage Movement Requests** page opens. On the **Search Results** section, click the **+** icon.

Inventory Organization 428330R Change Organization

Manage Movement Requests Done

Advanced Search

** Movement Request: Between [] - []
 ** Created By: []
 ** Movement Request Type: []
 ** Transaction Type: []
 ** Item: []

Saved Search: All Movement Requests
 ** At least one is required
 ** Line Status: []
 Source Subinventory: []
 Destination Subinventory: []

Search Reset Save... Add Fields Reorder

Search Results

Actions View +

Movement Request	Line Number	Movement Request Type	Required Date	Transaction Type	Item	Requested Quantity	Delivered Quantity	UOM Name	Line Status	Cre
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- Select **Movement Request Issue** from the *Transaction Type* drop-down choice list.

Inventory Organization 428330R Change Organization

Create Movement Request Save Submit Cancel

Movement Request

* Movement Request: 66001
 Description: []
 Required Date: 5/13/23 5:37 PM
 Transaction Type: Movement Request Issue

Movement Request Type: Requisition
 Status: Incomplete
 Source Subinventory: []
 Destination Subinventory: []
 Destination Account: []

Additional Information

Lines

Actions View + × Details

Line Number	* Item	* Transaction Type	* Required Date	* Requested Quantity	* UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destin Locator
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9. On the *Destination Account* field, click the magnifying glass [🔍] icon.

Inventory Organization 428330R Change Organization

Create Movement Request ? Save Submit Cancel

Movement Request

* Movement Request 66001

Description

Required Date 5/13/23 5:37 PM

Transaction Type Movement Request Issue

Movement Request Type Requisition

Status Incomplete

Source Subinventory

Destination Subinventory

Destination Account 🔍

Additional Information

Lines

Actions View + Details

Line Number	Item	Transaction Type	Required Date	Requested Quantity	UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destination Locator
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10. The *Destination Account* pop-up appears. Enter the fields on the *Destination Account* window as required for your agency, item, and inventory organization.

Create Movement Request ? Save Submit Cancel

Destination Account

Hide Segments

Agency 1900 DEPARTMENT OF PUBLIC SAFETY

Budget Fund 700200 DPS 7100 ENTERPRISE FUND

Account 53800001 PFR-MANUFACTURING-DIRECT

Agency Mgmt Unit 1905830 CALEDONIA WAREHOUSE

Agency Program 0000000 DEFAULT Agency Program NC CASH

Funding Source 0000 UNDESIGNATED

Project 0000000000 DEFAULT Project NC CASH

Inter Fund 000000 DEFAULT Inter Fund NC CASH

Future 1 0000 DEFAULT Future 1 Test

Future 2 000000 DEFAULT Future 2

Future 3 000000 DEFAULT Future 3 NC CASH

Search Reset | OK Cancel

11. Click the **OK** button.

Destination Account ✕

▲ Hide Segments

Agency 1900 DEPARTMENT OF PUBLIC SAFETY

Budget Fund 700200 DPS 7100 ENTERPRISE FUND

Account 53800001 PFR-MANUFACTURING-DIRECT

Agency Mgmt Unit 1905830 CALEDONIA WAREHOUSE

Agency Program 0000000 DEFAULT Agency Program NC CASH

Funding Source 0000 UNDESIGNATED

Project 0000000000 DEFAULT Project NC CASH

Inter Fund 000000 DEFAULT Inter Fund NC CASH

Future 1 0000 DEFAULT Future 1 Test

Future 2 0000000 DEFAULT Future 2

Future 3 000000 DEFAULT Future 3 NC CASH

12. On the **Lines** section, click the + icon.

Inventory Organization 428330R

Create Movement Request Save Submit Cancel

▲ Movement Request

* Movement Request 67001

Description

Required Date 5/13/23 5:52 PM

Transaction Type Movement Request Issue

Movement Request Type Requisition

Status Incomplete

Source Subinventory

Destination Subinventory

Destination Account 1900-700200-53800001-1905830-0000

▶ Additional Information

Lines

Actions View + Details

Line Number	* Item	* Transaction Type	* Required Date	* Requested Quantity	* UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destination Locator

13. Enter the **Item Number** in the *Item* field.

Inventory Organization 428330R Change Organization

Create Movement Request ? Save Submit Cancel

Movement Request
 * Movement Request: 67001
 Description:
 Required Date: 5/13/23 5:52 PM
 Transaction Type: Movement Request Issue

Movement Request Type: Requisition
 Status: Incomplete
 Source Subinventory:
 Destination Subinventory:
 Destination Account: 1900-700200-53800001-1905830-000C

Additional Information

Lines

Actions View + X Details

Line Number	* Item	* Required Date	* Requested Quantity	* UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destination Locator	Destination Account
1	0001910	5/13/23 6:07			Incomplete					1900-700200-5380

14. Enter the **Required Date** in the *Required Date* field.

Inventory Organization 428330R Change Organization

Create Movement Request ? Save Submit Cancel

Movement Request
 * Movement Request: 67001
 Description:
 Required Date: 5/13/23 5:52 PM
 Transaction Type: Movement Request Issue

Movement Request Type: Requisition
 Status: Incomplete
 Source Subinventory:
 Destination Subinventory:
 Destination Account: 1900-700200-53800001-1905830-000C

Additional Information

Lines

Actions View + X Details

Line Number	* Item	* Required Date	* Requested Quantity	* UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destination Locator	Destination Account
1	0001910	5/13/23 6:07			Incomplete					1900-700200-5380

15. Enter the **Required Quantity** in the *Requested Quantity* field.

Inventory Organization 428330R Change Organization

Create Movement Request ? Save Submit Cancel

Movement Request
 * Movement Request: 67001
 Description:
 Required Date: 5/13/23 5:52 PM
 Transaction Type: Movement Request Issue

Movement Request Type: Requisition
 Status: Incomplete
 Source Subinventory:
 Destination Subinventory:
 Destination Account: 1900-700200-53800001-1905830-000C

Additional Information

Lines

Actions View + X Details

Line Number	* Item	* Transaction Type	* Required Date	* Requested Quantity	* UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destination Locator	De Ac
1	...	Movement Req	5/13/23 6:07	<input type="text" value="1"/>	C/	Incomplete	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1

16. Click the **Submit** button.

Inventory Organization 428330R Change Organization

Create Movement Request ? Save Submit Cancel

Movement Request
 * Movement Request: 67001
 Description:
 Required Date: 5/13/23 5:52 PM
 Transaction Type: Movement Request Issue

Movement Request Type: Requisition
 Status: Incomplete
 Source Subinventory:
 Destination Subinventory:
 Destination Account: 1900-700200-53800001-1905830-000C

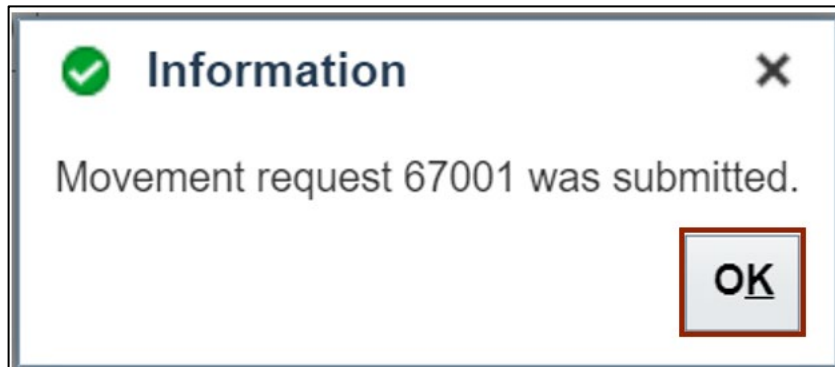
Additional Information

Lines

Actions View + X Details

Line Number	* Item	* Transaction Type	* Required Date	* Requested Quantity	* UOM Name	Status	Source Subinventory	Source Locator	Destination Subinventory	Destination Locator	De Ac
1	...	Movement Req	5/13/23 6:07	<input type="text" value="1"/>	C/	Incomplete	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1

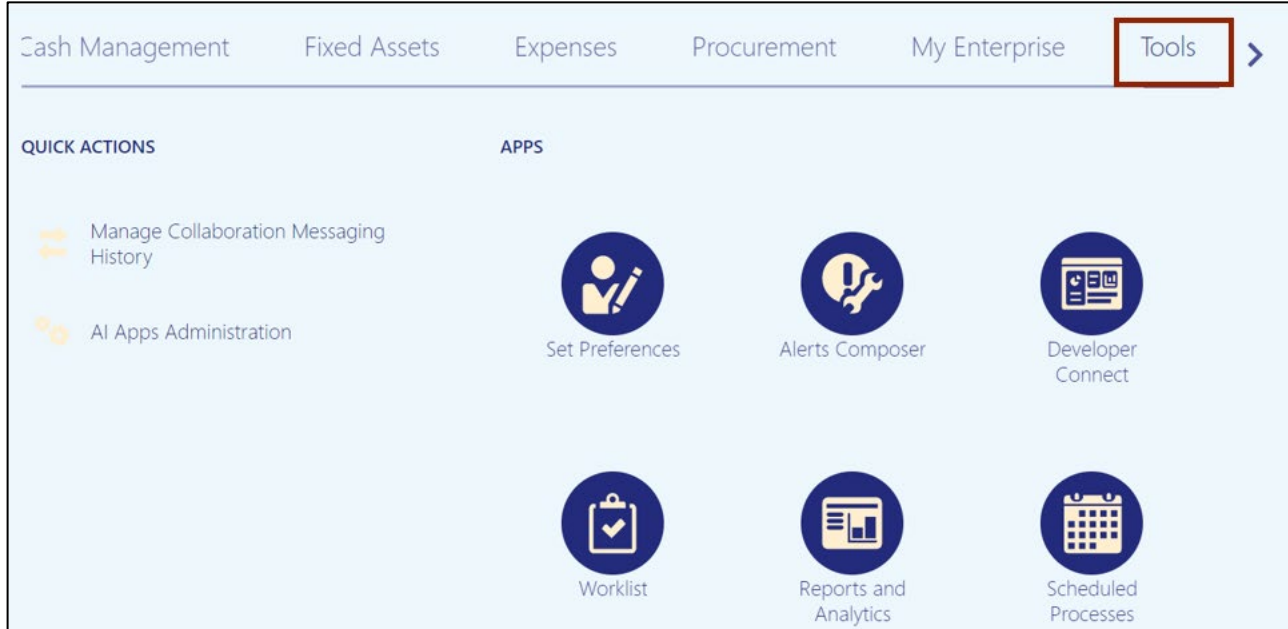
- The *Information* message pop-up appears. Click the **OK** button. This will lead you to the **Manage Movement Requests** page. Now you have completed the creating movement process.



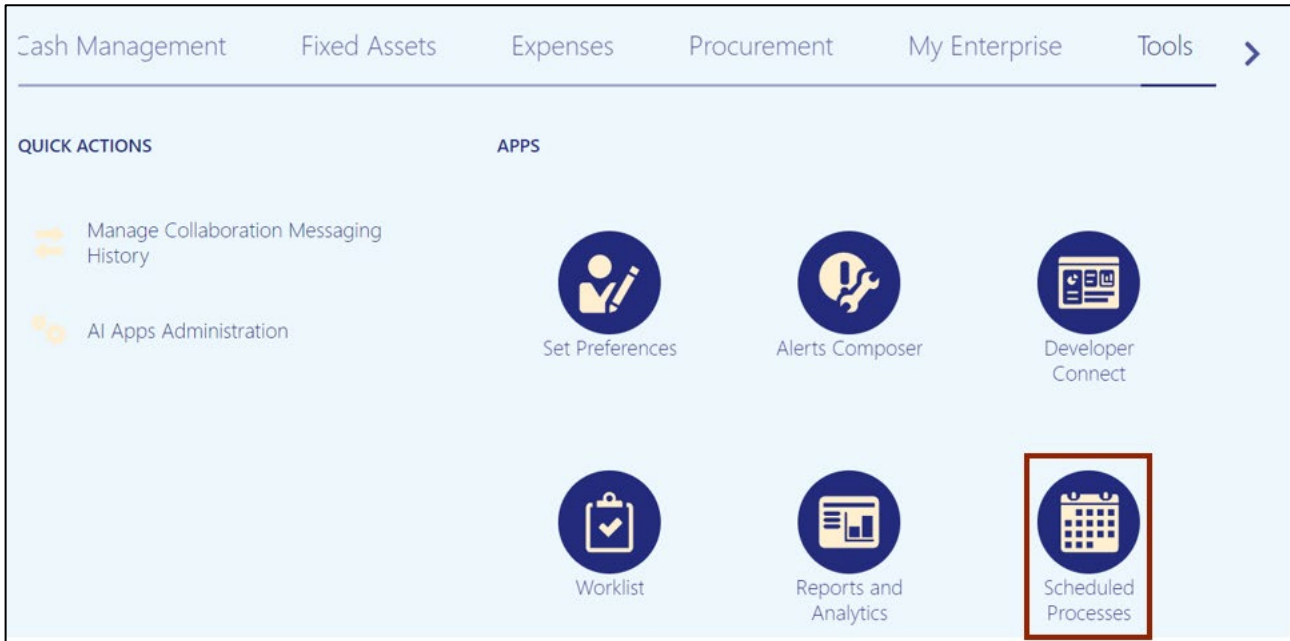
Manage Movement Requests

To manage movement requests in NCFCS, please follow the steps below:

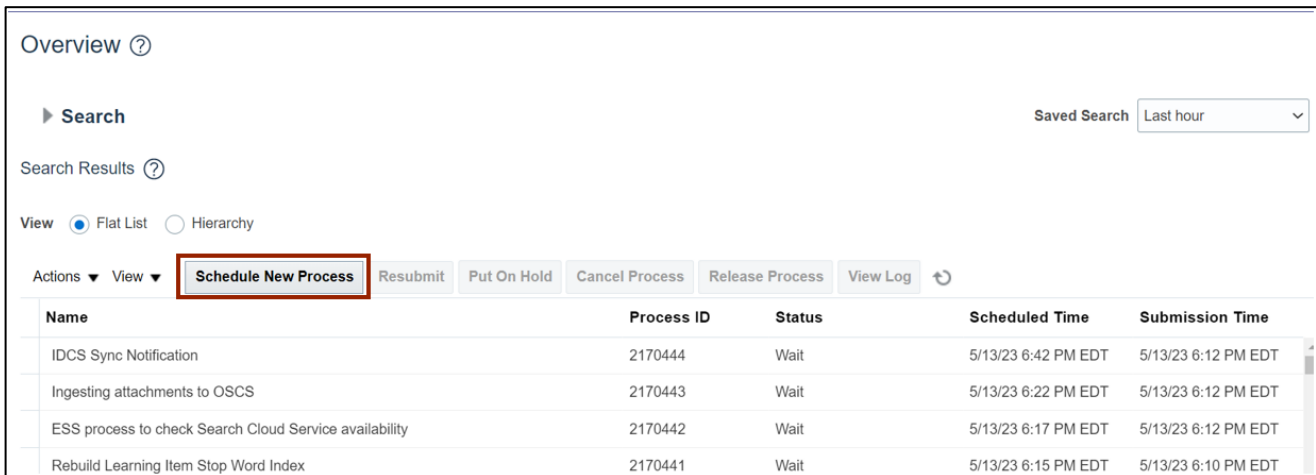
- Navigate to the **Home** page, click the **Tools** tab.



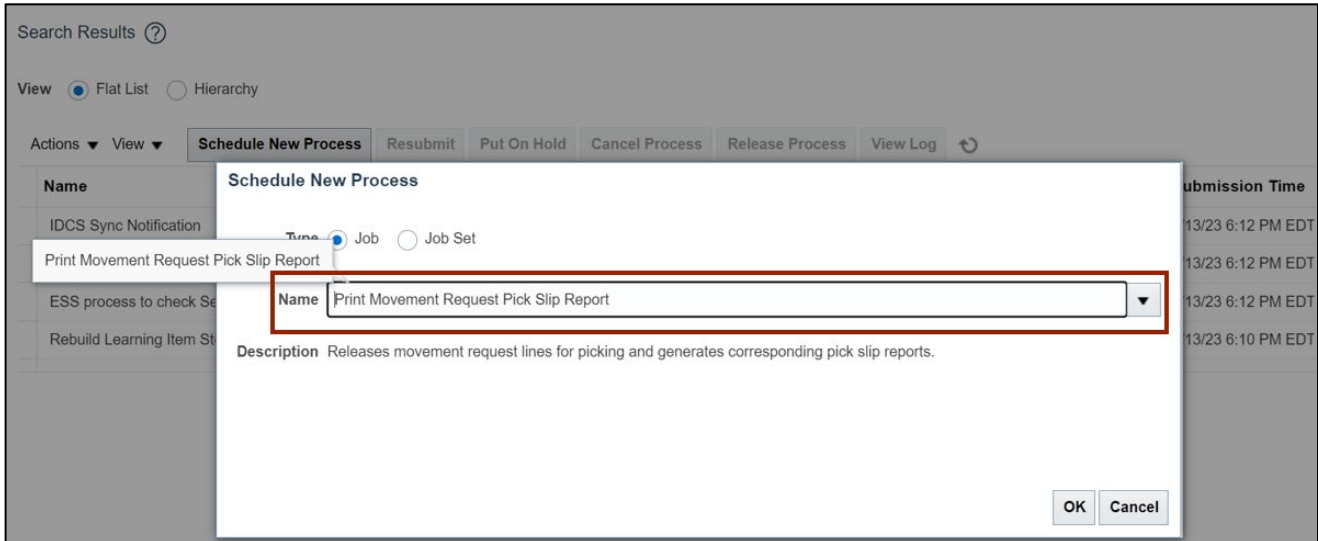
2. Click the **Scheduled Processes** app.



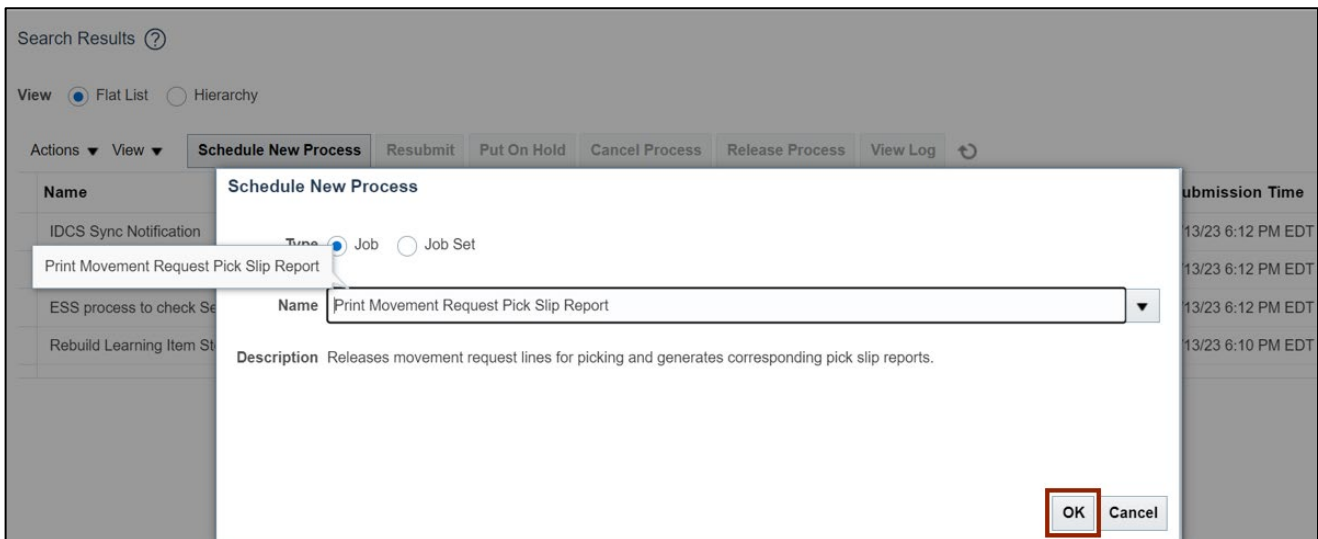
3. On the **Overview** page, click the **Schedule New Process** button.



4. Search in the **Name** field. From the **Name** drop-down choice list select **Print Movement Request Pick Slip Report**. The description is auto populated once the name is entered.



5. Click the **OK** button.



- The *Process Details* pop-up appears. Enter the **Organization** name in the *Organization* field.

In this example we choose **428330R**.

Process Details

This process will be queued up for submission at position 1

Process Options: [Advanced] [Submit] [Cancel]

Name: Print Movement Request Pick Slip Report Print output

Description: Releases movement request lines for picking and... Notify me when this process ends

Schedule: As soon as possible Submission Notes: [Text Box]

Basic Options

Parameters

* Organization: 428330R

From Movement Request: [Dropdown]

To Movement Request: [Dropdown]

From Pick Slip: [Dropdown]

To Pick Slip: [Dropdown]

Source subinventory: [Dropdown]

Source Locator: [Dropdown]

Destination subinventory: [Dropdown]

Scheduled Time	Submission Time
3/23 6:42 PM EDT	5/13/23 6:12 PM EDT
3/23 6:22 PM EDT	5/13/23 6:12 PM EDT
3/23 6:17 PM EDT	5/13/23 6:12 PM EDT
3/23 6:15 PM EDT	5/13/23 6:10 PM EDT

- Scroll down and select **Yes** from *Release Approved Lines* drop-down choice list.

Schedule: As soon as possible Submission Notes: [Text Box]

Basic Options

Parameters

From Required Date: m/d/yy

To Required Date: m/d/yy

Line Status to Print: Open picks

Movement Request Type: All

From Order: [Dropdown]

To Order: [Dropdown]

Carrier: [Dropdown]

Customer: [Dropdown]

Release Approved Lines: Yes

Pick Slip Grouping Rule: [Dropdown]

Project Number: [Text Box]

Task Number: [Dropdown]

8. Scroll up and click the **Submit** button.

Process Details

This process will be queued up for submission at position 1

Process Options Advanced **Submit** Cancel

Name Print Movement Request Pick Slip Report Print output

Description Releases movement request lines for picking and... Notify me when this process ends

Schedule As soon as possible Submission Notes

Basic Options

Parameters

* Organization 428330R

From Movement Request

To Movement Request

From Pick Slip

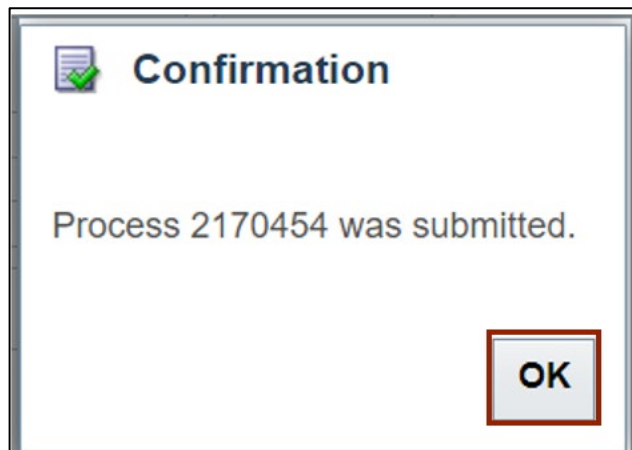
To Pick Slip

Source subinventory

Source Locator

Destination subinventory

9. The *Confirmation* pop-up appears. Click the **OK** button. This will lead you to the **Overview** dashboard.



10. Expand the **Search** section on the **Overview** dashboard.

Overview ?

Search Saved Search Last hour

Search Results ?

View Flat List Hierarchy

Actions View **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log

Name	Process ID	Status	Scheduled Time	Submission Time
IDCS Sync Notification	2170444	Wait	5/13/23 6:42 PM EDT	5/13/23 6:12 PM EDT
Ingesting attachments to OSCS	2170443	Wait	5/13/23 6:22 PM EDT	5/13/23 6:12 PM EDT
ESS process to check Search Cloud Service availability	2170442	Wait	5/13/23 6:17 PM EDT	5/13/23 6:12 PM EDT
Rebuild Learning Item Stop Word Index	2170441	Wait	5/13/23 6:15 PM EDT	5/13/23 6:10 PM EDT

11. Enter the **Process ID**.

Overview ?

Search Saved Search Last hour

Name

Process ID

Status

Submission Time After 5/13/23 5:14 PM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes Contains

Submitted By

Search **Reset** **Download Results**

12. Click the **Search** button.

Overview ?

Search Saved Search Last hour

Name

Process ID

Status

Submission Time After 5/13/23 5:14 PM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes Contains

Submitted By

Search **Reset** **Download Results**

13. Click the **Process** line.

Overview ?

Search

Name

Process ID

Status

Submission Time (UTC-05:00) New York - Eastern Time (ET)

Submission Notes

Submitted By

Search Reset Download Results

Search Results ?

View Flat List Hierarchy

Actions View Schedule New Process Resubmit Put On Hold Cancel Process Release Process View Log

Name	Process ID	Status	Scheduled Time	Submission Time
Print Movement Request Pick Slip Report	2170454	Succeeded	5/13/23 6:22 PM EDT	5/13/23 6:22 PM EDT

14. On the **Process Details** tab, click **Republish**.

Search Results ?

View Flat List Hierarchy

Actions View Schedule New Process Resubmit Put On Hold Cancel Process Release Process View Log

Name	Process ID	Status	Scheduled Time	Submission Time
Print Movement Request Pick Slip Report	2170454	Succeeded	5/13/23 6:22 PM EDT	5/13/23 6:22 PM EDT

Process Details Status Details

Print Movement Request Pick Slip Report, 2170454

Status Succeeded Schedule Start 5/13/23 6:22 PM EDT External Job Type BIP Job External Job Status NA

Log

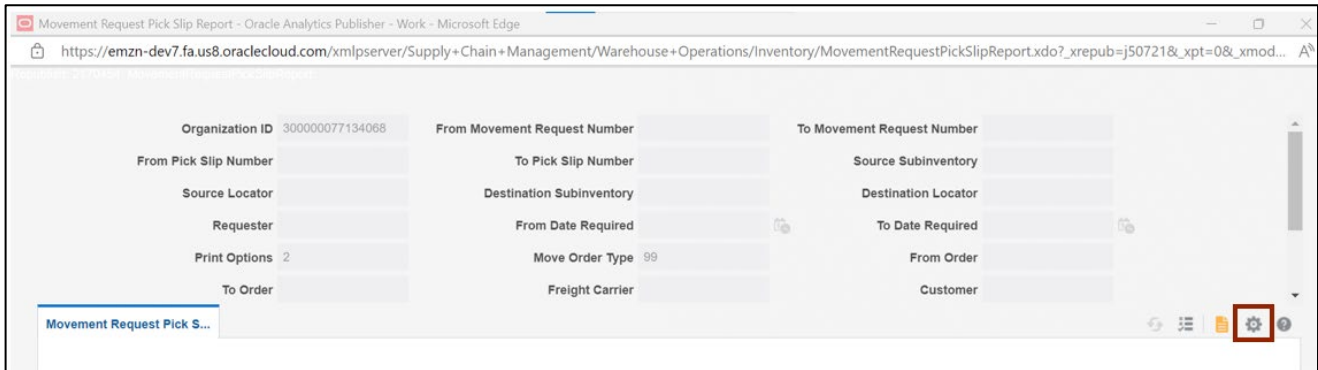
Attachment ESS_L_2170454

Output

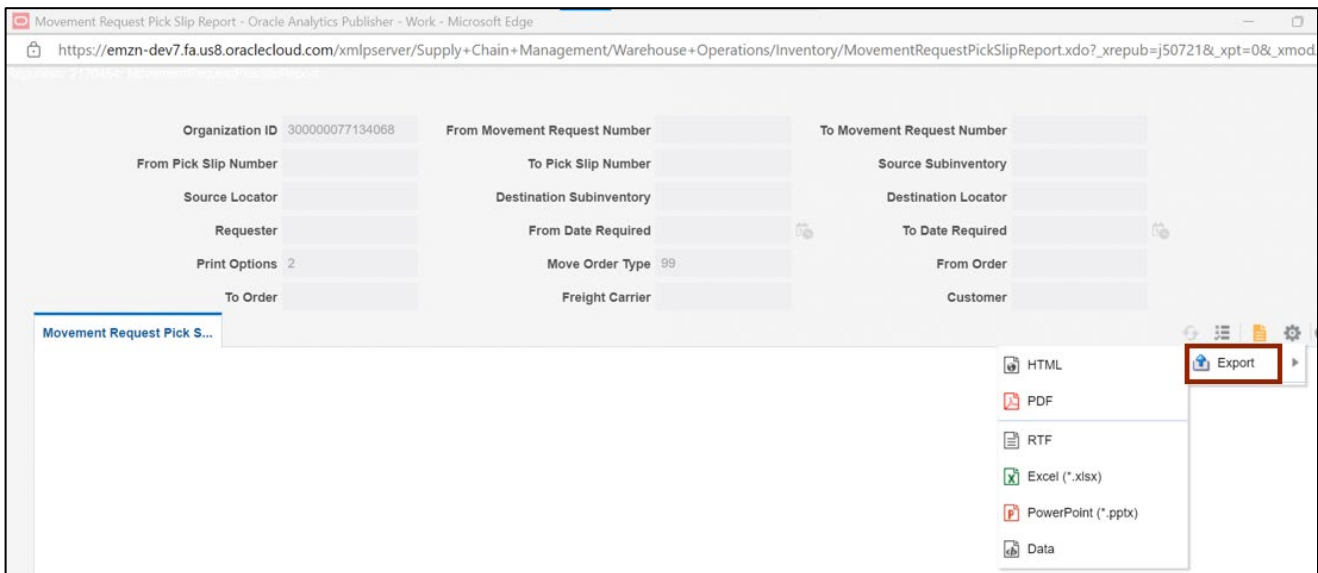
Output & Delivery

XML Data Diagnostic Log **Republish**

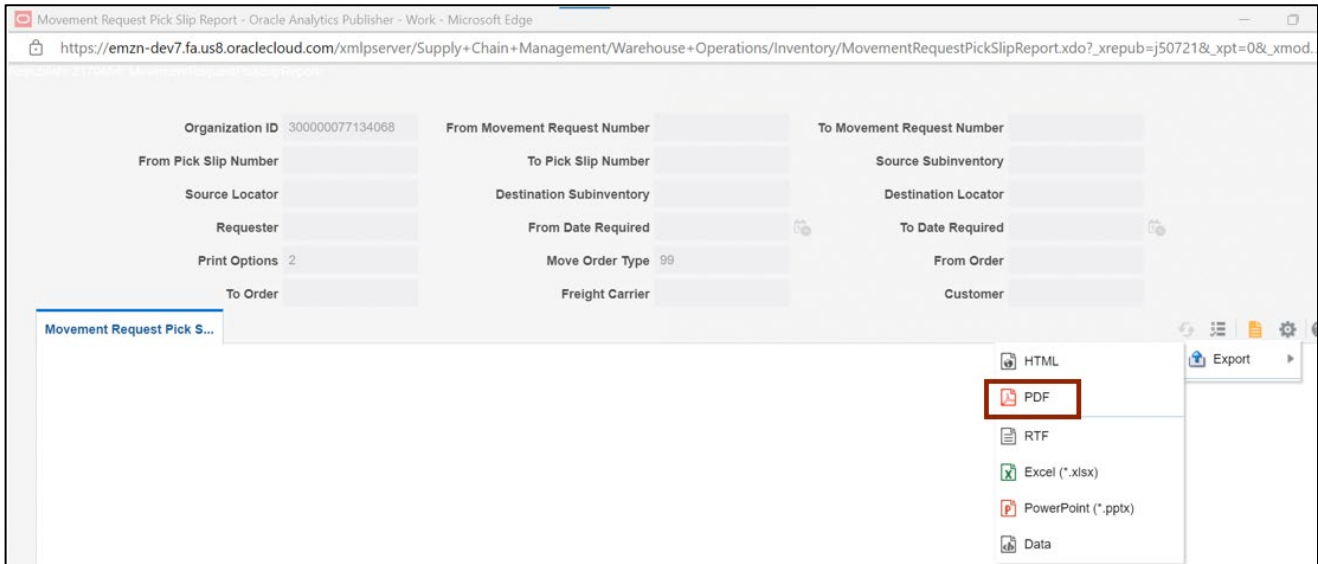
15. The **Movement Request Pick Slip Report** tab opens, click the **Actions** [] icon.



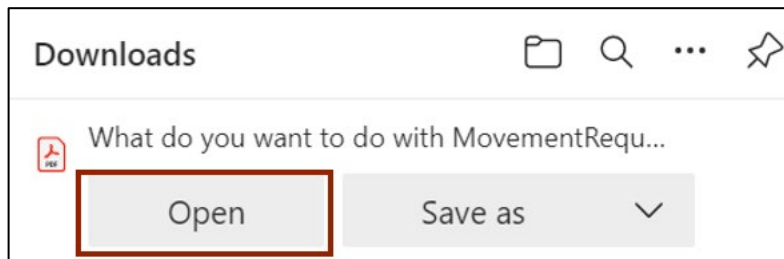
16. Click **Export**.



17. Click **PDF**.



18. Click the **Open** button.



19. View The Movement Request Pick Slip report.

ORACLE		Movement Request Pick Slip				Report Date		5/13/23 6:30 PM		
ENTERPRISE DST - PRODUCE								Page 1 of 1		
DISTRIBUTION - CENTER										
Pick Slip		31001				Pick Slip Page		1/1		
Movement Request	Movement Request Line	Pick Status	Item and Description	Revision	Source Subinventory and Locator	Destination Subinventory, Locator, and Account	Requester	Reference	UOM	Quantity
67001	1	Open picks	0001910		SUB428330R				CASE	1
			ALL GREEN LIMA BEANS, MEDIUM SIZE, 6/#10 CANS/CASE			1900-700200-53800001-1905830-0000000-0000-0000000000-000000-00000	TRSUPER 1			
ORACLE		Movement Request Pick Slip				Report Date		5/13/23 6:30 PM		
ENTERPRISE DST - PRODUCE								Page 1 of 1		
DISTRIBUTION - CENTER										
End of Report										

Wrap-Up

Using the steps above to create and manage movement requests and view movement request pick slip report.

Additional Resources

Virtual Instructor-Led Training (vILT)

- INV106: Warehouse Transactions