



# **MATERIAL MASTER REQUEST FORM – INSTRUCTIONS**

**Department of General Services**

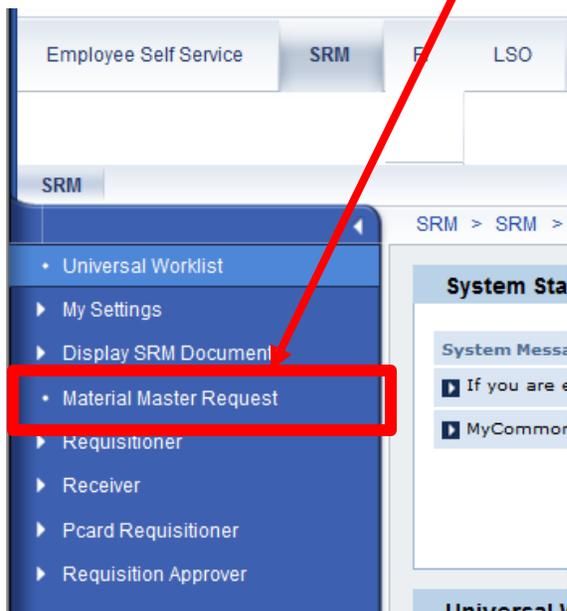
**Bureau of Procurement**

**Quality Assurance**

1. Click on the **SRM** tab on the next screen.



2. Look for and click on **Material Master Request**.



3. The following screen will display

## SEARCH for a Material

1. To search for a material that has been created in the system or to verify a like item already exists you select **SEARCH** from the drop down selections menu.

The screenshot shows the 'Material Master Request Form' with a 'Request Type' dropdown menu. The menu is open, showing options: 'Search', 'Create', 'Search', and 'Change'. A red arrow points to the 'Search' option in the second row of the dropdown. Below the dropdown is a section labeled 'Existing Material'.

2. Enter a material number or description and select the search button 

Example of a description search

The screenshot shows the 'Existing Material Search' form. It has two input fields: 'Material No.' and 'Description:'. The 'Description:' field contains the text 'BOLT\*'. To the right of the 'Description:' field is a 'Search' button with a magnifying glass icon.

3. Search results

Material	Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty
121078	BOLT,CLOSET,JOHNNY,1/4"X2-1/4",2/PK	ZOPS	31161600	EA	PAC	2	1
122720	BOLT,CARRIAGE,5,16"X2 1,2"	ZOPS	31161600	EA	EA	1	1
122721	BOLT,U,1,4"C1 3,4"X3",W,NUTS,07848070	ZOPS	31161600	EA	EA	1	1
122722	BOLT,5/8"X1-1/2",2WASHER,1 NUT,HEX HEAD	ZOPS	31161600	EA	EA	1	1
122723	BOLT,6",FT SPRING ACTION,STEEL,31056	ZOPS	31161600	EA	EA	1	1
122724	BOLT,CARRIAGE,1,4"X1",RND HD,ALL THREAD	ZOPS	31161600	EA	EA	1	1
122725	BOLT,CARRIAGE,3,8"X1",RND HD,ALL THREAD	ZOPS	31161600	EA	EA	1	1
122726	BOLT,CARRIAGE,3,8"X9",RND HD,ALL THREAD	ZOPS	31161600	EA	EA	1	1
122727	BOLT,CARRIAGE,ROUNDHEAD,1/4THREAD,3/8X9"	ZOPS	31161600	EA	EA	1	1
122728	BOLT,LAG,3,8"X4",HEX HD	ZOPS	31161600	EA	EA	1	1
122729	BOLT,CARRIAGE,3,8"X10",RND HD,QTR THREAD	ZOPS	31161600	BOX	BOX	1	1
122730	BOLT,EYE,3,8"X6",W,HEX NUTS	ZOPS	31161600	EA	PAC	10	1

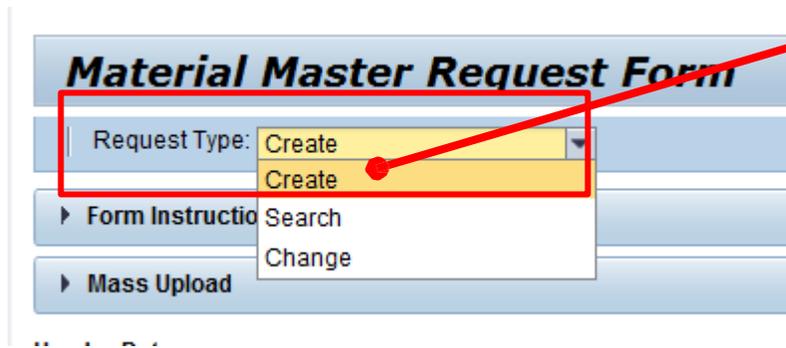
4. Result list will display the Material number, Description, Material Type, Material Group, Base Unit of Measure and any Alternate Unit of Measure.

The screenshot shows the SRM interface for the Material Master Request Form. The breadcrumb trail is SRM > SRM > Material Master Request. The page title is "Material Master Request Form" with a "View Status Report" button. A "Request Type" dropdown menu is set to "Search". Below this is an "Existing Material Search" section with input fields for "Material No." and "Description", and a "Search" button. A "Form Instructions" section is also visible. At the bottom, a table displays search results with the following columns: Material, Description, Material Type, Material Group, Base Unit, Alt. UOM, Base Qty, and Alt UOM Qty. The first row in the table has a yellow background and shows "0" in the "Base Qty" and "Alt UOM Qty" columns.

Material	Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty
						0	0

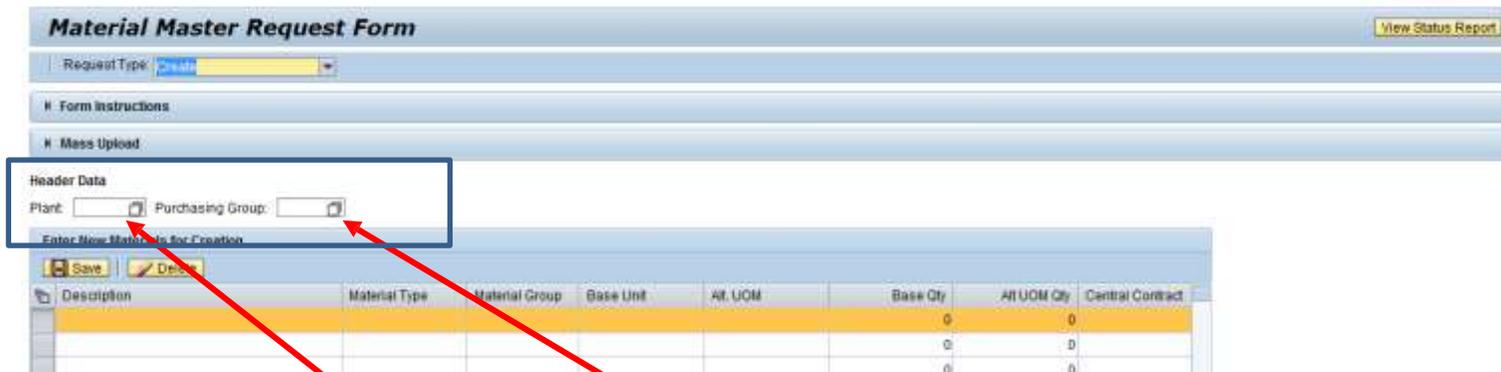
## Create a Material

1. Requestor will need to use the drop down under the Request Type and select CREATE



The screenshot shows the 'Material Master Request Form' interface. A red box highlights the 'Request Type' dropdown menu, which is currently set to 'Create'. A red arrow points from the word 'CREATE' in the text above to the 'Create' option in the dropdown menu. Below the dropdown, there are two expandable sections: 'Form Instructions' and 'Mass Upload'.

2. The screen will change to the following



The screenshot shows the 'Material Master Request Form' interface after the 'Request Type' has been set to 'Create'. A blue box highlights the 'Header Data' section, which contains two dropdown menus: 'Plant' and 'Purchasing Group'. Red arrows point from the text 'Plant Number (i.e. 6700)' and 'Purchasing Group (i.e. 279)' below to these respective dropdown menus. Below the header data, there is a table with columns: Description, Material Type, Material Group, Base Unit, Alt UOM, Base Qty, Alt UOM Qty, and Central Contract. The table is currently empty.

Required entry:

**Plant Number (i.e. 6700)**

**Purchasing Group (i.e. 279)**

3. If you do not know your Plant, you can use the drop down search capability.

Plant:  

Plant: All Values

Personal Value List Settings

Search Term 2:

Search Term 1:

Postal Code:

City:

Name 2:

Company name:

Address Version:

Plant:

Restrict Number of Value List Entries To: 500

Start Search Reset

OK Cancel

Remove the check mark at the left of the “Restrict Number of Value List Entries To” to clear the number listed.

Start Search

4. Select the Start Search button to display the list of Plants.
5. You can scan the list to find your plant number, then click in the box at the left of the line to highlight the line and then OK.

Plant: All Values

Personal Value List Settings

Search Term 2:

Search Term 1:

Postal Code:

City:

Name 2:

Company name:

Address Version:

Plant:

Restrict Number of Value List Entries To: 500

Start Search Reset

Pl.	Search Term 2	Search Term 1	Postal Code	CITY	Name 2	Name	Address Version
6400	6400	90	17602-3113	Lancaster		Thaddeus Stevens Coll Tech	
6500	6500	GAMING	17128	Harrisburg		PA Gaming Control Board	
6600	6600	PSC	17120-1410	Harrisburg		PSC	
6700	6700	HLTH	17108	Harrisburg		HLTH	
6800	6800	AGR	17110	Harrisburg		AGR	
6801	6801	AO	17110	Harrisburg		AO Vet Lab	
7000	7000	SERS	17108-1147	Harrisburg		SERS	
7100	7100	PMRD	17108-1185	Harrisburg		PMRD	
7200	7200	PSERS	17101-1905	Harrisburg		PSERS	
7400	7400	DRUG	17104	Harrisburg		Department of Drug/Alcohol Progr...	

OK Cancel

## Material Master Request Form

Request Type: Create

Form Instructions

Mass Upload

### Header Data

Plant: 6700 Purchasing Group:

### Enter New Materials for Creation

Save Delete

6. If you do not know your **Purchasing Group**, you can use the drop down search capability.

Purchasing Group:

Purchasing Group: All Values

Show Filter Criteria Personal Value List Settings

Purch. Group	Description	Tel.no.purch_gp	Fax Number
271	PGC Ligonier	724-238-9523	724-238-5127
272	PGC Reading	610-926-3136	610-926-8835
273	PGC Dallas	570-675-1143	570-675-2394
274	PGC Huntingdon	814-643-1831	814-643-2952
275	DGS PW non-CPA	717-787-7842	717-705-2244
277	DGS Admin Central	717-787-1356	717-783-0570
278	DGS Warehouse	717-787-6148	717-772-2491
279	DGS Central	717-787-5566	717-783-6241
280	DGS Philadelphia S	215-560-1055	215-560-2759
281	DGS Pittsburgh SOB	412-565-5373	412-565-7717

OK Cancel

7. You can scan the list to find your **Purchasing Group number**, then click in the box at the left of the line to highlight the line and then **OK**.

**NOTE:** If you are requesting more than 19 new materials refer to the **MASS Upload** instructions (Page 10).

**Material Master Request Form**

Request Type:

▶ Form Instructions

▶ Mass Upload

Header Data

Plant:  Purchasing Group:

Enter New Materials for Creation

Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
					0	0	
					0	0	
					0	0	
					n	n	

8. After entering required information, select SAVE to submit your request to DGS/QA.

**IMPORTANT:**

**You will receive a final notice allowing you to go back to add or change your request.**



9. Select: Yes to submit your request. After submission any new changes will have to be performed by DGS/QA.

**Recommendation:** Open and review the Form Instructions panel to review the needed items for the remainder of the form.

☰ Form Instructions

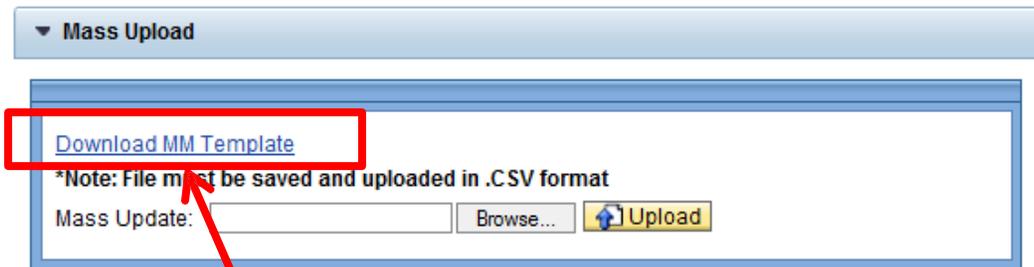
1. If any of the items are on a statewide contract, please **FIRST** review your request with the Commodity Specialist who manages the contract. Also indicate in the comment box the name of the Commodity Specialist who approved your request, as well as the state contract number.
  2. Item descriptions are limited to forty (40) total characters.
    - \_a. Begin the description with a **NOUN** that identifies the item. (i.e. FILTER). **DO NOT** abbreviate.
    - \_b. Use a comma, not a space, to separate the noun, adjective and attribute. (i.e. FILTER,AIR,12345)
  3. Material Types most commonly utilized are :
    - \_a. ZOPS - Operating Stocks (will have a dollar value and quantities, if placed into a plant's storage)
    - \_b. ZNVL - Non-valuation Stock (will not have a dollar value, only a quantity, if placed into a plant's storage)
    - \_c. ZSRV - Services (Material Masters created with this type will not go into a plant's storage)
  4. Do **NOT** enter a supplier's name, brand, or reference number in the short text. Use the PO Text area.
  5. Each unique Material Master will be assigned a number after it is approved.
  6. All information submitted is subject to change upon DGS/QA review.
- Note : Your request will not allow you to save (send for approval consideration) if entered items are incorrect or if a required field is left blank.

Send questions to:[ra-material@pa.gov](mailto:ra-material@pa.gov)

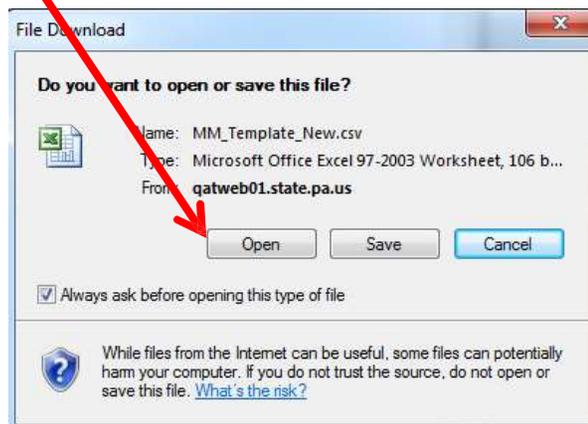
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## MASS UPLOAD

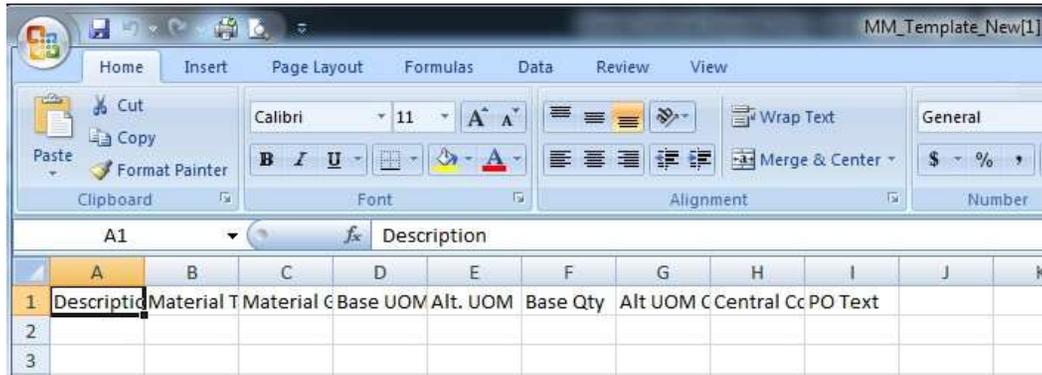
**NOTE:** If you are requesting more than 19 new materials, open and follow the instructions below:



1. Click on **Download MM Template**.
2. Select **Open**

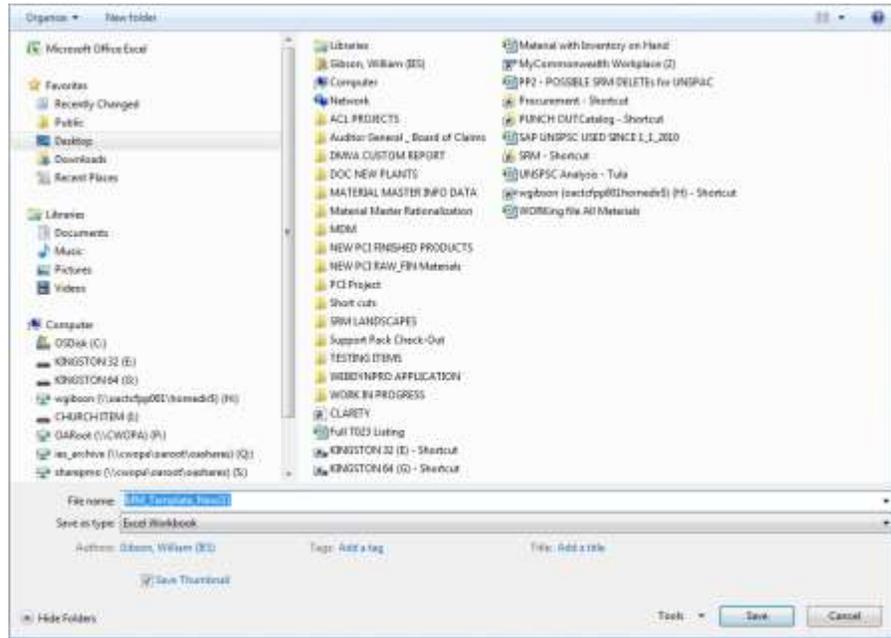


3. You will see the form layout as displayed in the subsequent screenshot



4. Expand the cells to allow for data enter.
5. If you need to search for Material Type and/or Material Group – minimize the worksheet to view the request screen
  - a. Use the drop down search capability.
6. Select **SAVE AS** an Excel Workbook to your Desktop.





- a. Open the Excel Workbook and expand the columns. Fill in the information for your material master request.

	A	B	C	D	E	F	G	H	I
1	Description	Material Type	Material Group	Base UOM	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract	PO Text
2									
3									

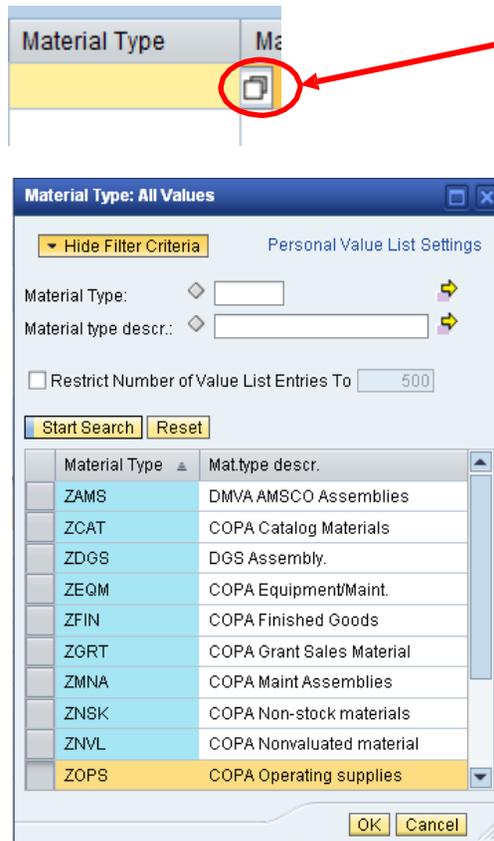
7. Select the entire Workbook and format the cells as TEXT. Fill in the needed data for your request(s) (Description, Material Type etc.).

**The following fields are required:**

**DESCRIPTION** (40 characters maximum): Describe the material (Noun, adjective, adjective etc.) Upper or lower case will be accepted.

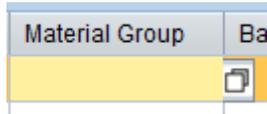
**Note:** DO NOT start your description with a number or blank space – you will receive an error message and you will not be able to submit your request until corrected.

**MATERIAL TYPE:** If you do not know the material type – use the search capability



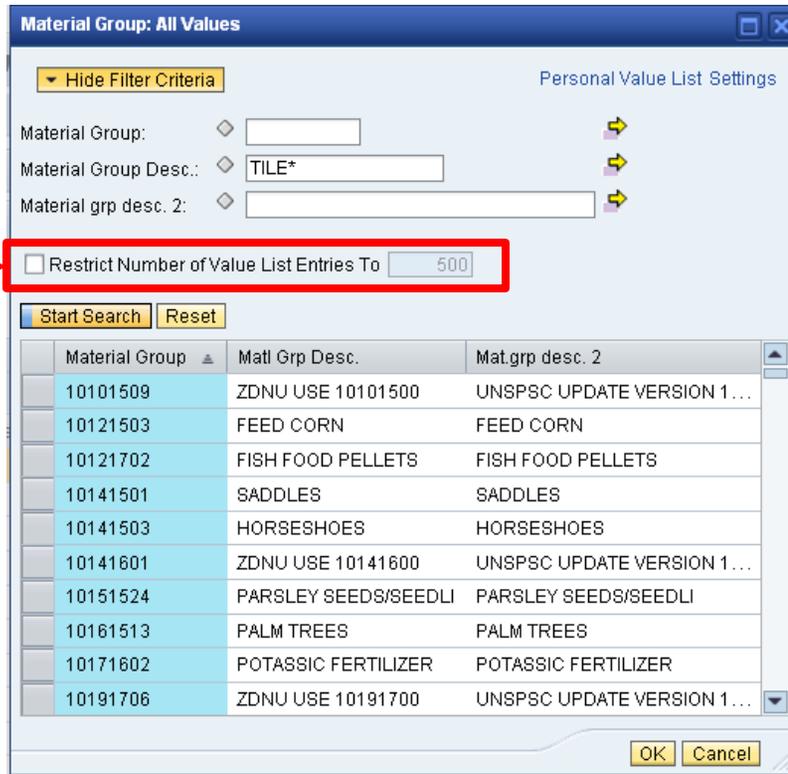
You can scan the list to find your Material Type list, then click in the box at the left of the line to highlight the line and then OK.

## MATERIAL GROUP:



If the Show Filter Criteria is hidden click on the button to open 

This will allow you to search for the material group.



Material Group: All Values

Hide Filter Criteria Personal Value List Settings

Material Group:

Material Group Desc.:

Material grp desc. 2:

Restrict Number of Value List Entries To

Start Search Reset

Material Group	Matl Grp Desc.	Mat.grp desc. 2
10101509	ZDNU USE 10101500	UNSPSC UPDATE VERSION 1...
10121503	FEED CORN	FEED CORN
10121702	FISH FOOD PELLETS	FISH FOOD PELLETS
10141501	SADDLES	SADDLES
10141503	HORSESHOES	HORSESHOES
10141601	ZDNU USE 10141600	UNSPSC UPDATE VERSION 1...
10151524	PARSLEY SEEDS/SEEDLI	PARSLEY SEEDS/SEEDLI
10161513	PALM TREES	PALM TREES
10171602	POTASSIC FERTILIZER	POTASSIC FERTILIZER
10191706	ZDNU USE 10191700	UNSPSC UPDATE VERSION 1...

OK Cancel

You can scan the list to find your Material Group list, or use the filter criteria,

- Enter a description (partial) followed by an asterisk “\*”.
- Uncheck** “Restrict Number of Value List Entries To”.

c. Click on 'Start Search'

Material Group: All Values

Hide Filter Criteria Personal Value List Settings

Material Group:

Material Group Desc.:  TILE\*

Material grp desc. 2:

Restrict Number of Value List Entries To

Start Search Reset

Material Group	Matl Grp Desc.	Mat.grp desc. 2
30131700	TILES & FLAGSTONES	TILES & FLAGSTONES
72152200	TILE/MARBLE/MOS SVC	TILE/MARBLE/MOS SVC

OK Cancel

d. View the result screen list.

5. To select the material group, click in the box at the left of the line to highlight the line and then OK.

**BASE UNIT OF MEASURE (Base Unit):** The unit of measure you will be stocking/issuing the material by. (I.e. EACH, PAC, CS)

**ALTERNATE UNIT OF MEASURE (Alt. UOM):** *OPTIONAL* - The unit of measure that you will be using to purchase the material from your vendor. (I.e. PAC, BOX, CASE etc.)

**BASE UNIT OF MEASURE QUANTITY (Base Qty):** The quantity in the selected base unit of measure you entered above will be “1”, **unless** you have entered an Alt.UOM, in which case it will be the amount/quantity in that unit. (I.e. PAC = 12, BOX = 24, CASE = 144 etc.)

Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
tile,floor,white,3x3	ZOPS	30131700	ea	cs	144	1	

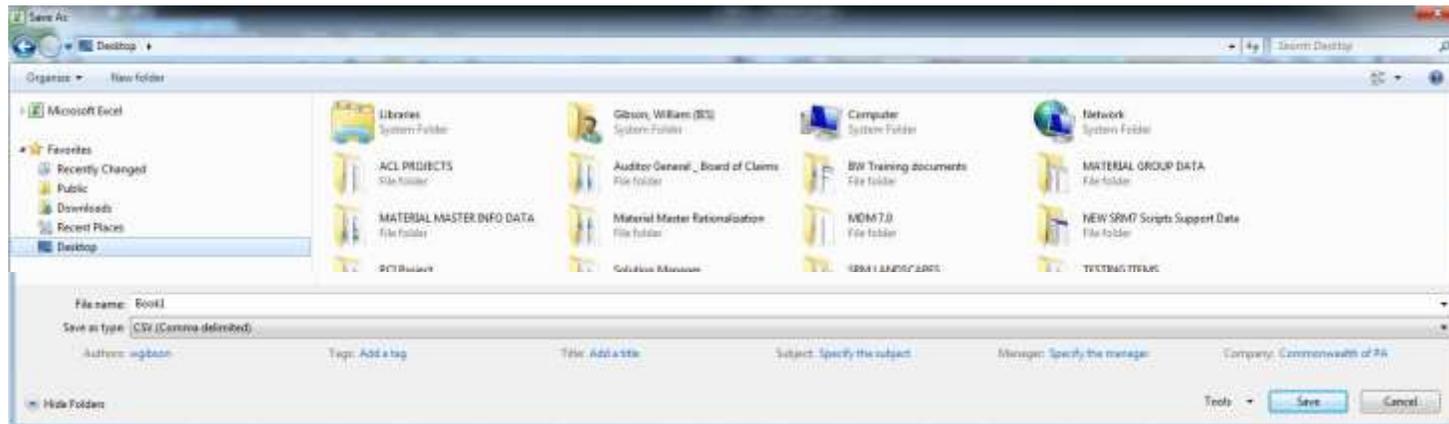
**ALTERNATE UNIT OF MEASURE QUANTITY (Alt. UOM Qty):** **ONLY NEEDED WHEN** an Alt.UOM is entered this will be “1”.

**CENTRAL CONTRACT:** Not required at this time.

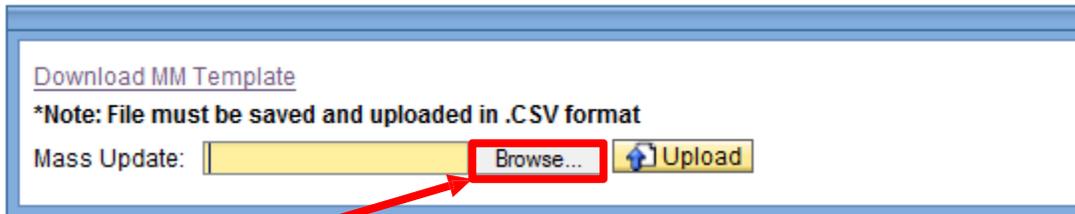
**ADDITIONAL OPTIONAL FIELDS:**

**PO TEXT** – You may enter up to 255 characters (this includes spaces) **Do not use any commas.**

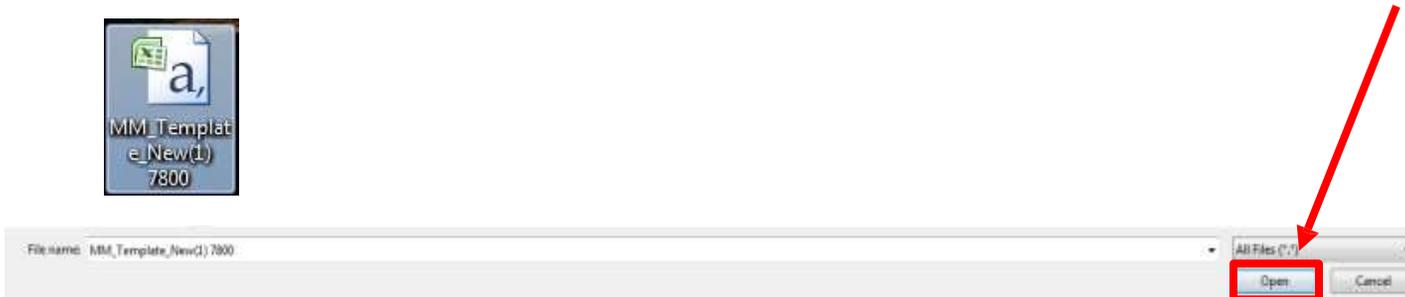
- Select SAVE – Excel Workbook and rename the file to reflect your plant number.
- Select your Desktop as the site to save the file to.
- Change the FILE TYPE to .CSV ( **CSV (Comma delimited)** )



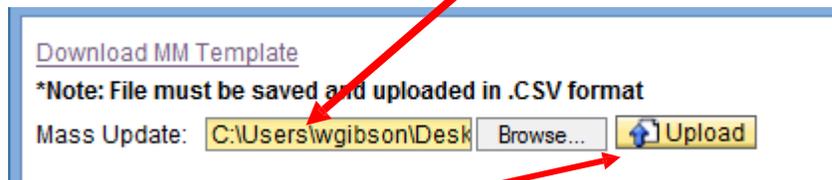
d. Return to the Material Master Create screen.



e. Use the **Browse** button. Locate your .CSV file on your desktop, click on it to highlight and then select **open**.



f. Verify your file name shows in the Mass Update: window



g. Select **Upload**

The upload file will populate the fields on the material master request form.

Enter New Materials for Creation

Save Delete

Description	Material Type	Material Group	Base Unit	Alt UOM	Base Qty	Alt UOM Qty	Central Contract
JACK,TRUCK, HI-BOY 1	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 2	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 3	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 4	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 5	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 6	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 7	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 8	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 9	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 10	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 11	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 12	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 13	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 14	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 15	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 16	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 17	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 18	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 19	ZOPS	41100000	EA	BOX	4	1	
JACK,TRUCK, HI-BOY 20	ZOPS	41100000	EA	BOX	4	1	

8. Select **SAVE**  Save to submit your request(s).

**IMPORTANT:**

9. **You will receive a final notice allowing you to go back to add or change your request.**



10. **Select Yes: After submission any new changes will have to be performed by DGS/QA.**

**NOTE:**

If there is data missing you will receive an error message indicating the area of the error.

If all required field entries are complete and correct, you will receive a notice at the top of the screen.

Make note of this number for future follow-up, if needed. The requestor will also receive an email notification of the completed transaction.

✓ Request 000000000035 has been saved and submitted to the Approver

✓ Request 000000000035 has been saved and submitted to the Approver

### Material Master Request Form

Request Type:

▶ Form Instructions

▶ Mass Upload

**Header Data**

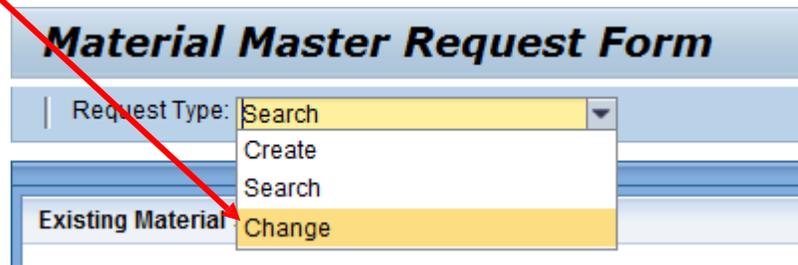
Plant:  Purchasing Group:

**Enter New Materials for Creation**

Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
					0	0	
					0	0	

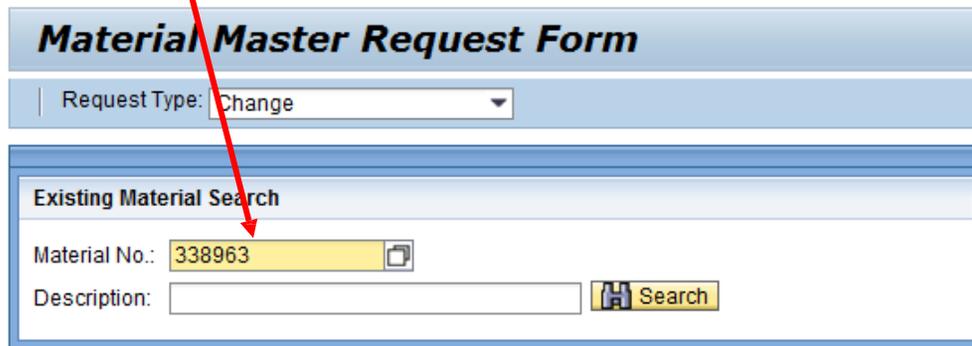
## REQUEST A CHANGE TO A MATERIAL

1. Select Change from the drop down menu



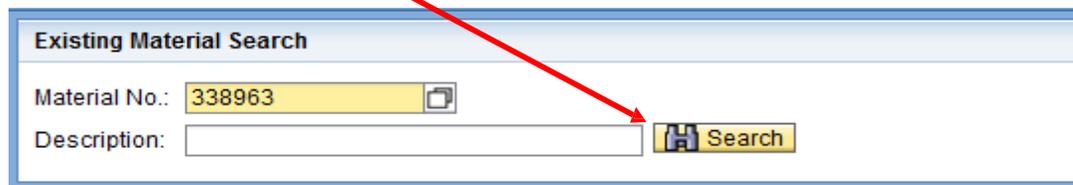
The screenshot shows the 'Material Master Request Form' with the 'Request Type' dropdown menu open. The menu options are 'Search', 'Create', 'Search', and 'Change'. The 'Change' option is highlighted in yellow. A red arrow points from the text 'Change' in the instruction to the 'Change' option in the dropdown menu.

2. Enter the Material Number of the item you would like to have changed or utilize the search function.



The screenshot shows the 'Material Master Request Form' with the 'Request Type' dropdown menu set to 'Change'. Below it is the 'Existing Material Search' section. The 'Material No.' field contains the text '338963'. A red arrow points from the text 'Material Number' in the instruction to the '338963' text in the 'Material No.' field.

3. Click on the Search  Search button.



The screenshot shows the 'Existing Material Search' section with the 'Material No.' field containing '338963'. The 'Search' button, which includes a magnifying glass icon, is highlighted in yellow. A red arrow points from the text 'Search' in the instruction to the 'Search' button.

4. The material information will display

Existing Material Search

Material No.: 338963  
Description:

Form Instructions  
Mass Upload

Header Data  
Plant:  Purchasing Group:

Change Materials

Material	Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
338963	BALL, ROUND,RED,	ZOPS	41100000	EA	EA	1	1	

5. Enter your **Plant** and **Purchasing Group** information

Header Data  
Plant: 1500  Purchasing Group: 279

Change Materials

Material	Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
338963	BALL, ROUND,RED,	ZOPS	41100000	EA	EA	1	1	

6. Click in the area you want to change. Make your changes.

Header Data  
Plant: 1500  Purchasing Group: 279

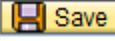
Change Materials

Material	Description	Material Type	Material Group	Base Unit	Alt. UOM	Base Qty	Alt UOM Qty	Central Contract
338963	BALL, ROUND,RED/WHITE	ZOPS	41100000	EA	BOX	12	1	

**Requestor is required to supply a comment to justify the change request.**

Request Comments:

Color of ball changed  
Alt UoM of BOX added 12 each = 1 box

7. Select **SAVE**  to submit your change request.

**IMPORTANT:**

**If all required field entries are complete and correct, you will receive a final notice allowing you to go back to add or change your request.**



8. Select: Yes to submit your request. If you select yes, you will receive a notice at the top of the screen.

**Make note of this number for future follow-up, if needed. The requestor will also receive an email notification.**

**After submission any new changes will have to be performed by DGS/QA.**

## Material Master Fact Sheet

- **Form Problem?**

If you have an issue using the new electronic MM form, capture it with a screenshot and email to [ra-material@pa.gov](mailto:ra-material@pa.gov) with a brief description so QA can determine if it is a business process or system issue.

- **Material Master Role Needed in Order to Use the Electronic Form**

In order to use the electronic form, please ensure you have this role by checking with your HR Office:

YBC: A\_ML\_SV\_MSTR\_REC\_PROC\_\*

Agency Material – Service Master Records Processor (RV0040)

- **Paper Version Phase-Out Date**

May 30, 2014, is the last day for the paper version. You will need to contact DGS Quality Assurance (QA) for any exceptions to use the paper version after May 30, 2014.

- **Quality Specialists**

-- Gerry Grecek, QA Specialist, [ggrecek@pa.gov](mailto:ggrecek@pa.gov), (717) 783-1161

-- Bill Hugendubler, QA Specialist, [whugendubl@pa.gov](mailto:whugendubl@pa.gov), (717) 525-5343

-- Brian Vulgaris, QA Specialist, [bvulgaris@pa.gov](mailto:bvulgaris@pa.gov), (717) 214-9506