



Process Documentation

Department:

Customer Support

Last Updated:

1/27/2026 1:22 PM

NAME OF PROCESS

Requesting Items Through Item Submission

Use Case / Objectives

The purpose of this procedure is to define the process for submitting, reviewing, approving, and creating new items in the Item Master. This process allows users in the field to request new items while ensuring appropriate controls, approvals, and notifications are enforced prior to the item being added to the system.

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

Security Setup (8-80-11) System File Maintenance > Security Authorizations > Item Submission Security

Item Submission Processing (2-39) Purchasing Operations > Other > Item Submission

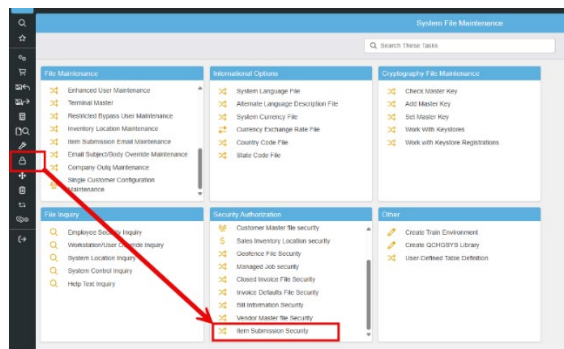
Requisitions (2-7) Purchasing Operations > Purchase Order Functions > Requisitions

Item Submission Security

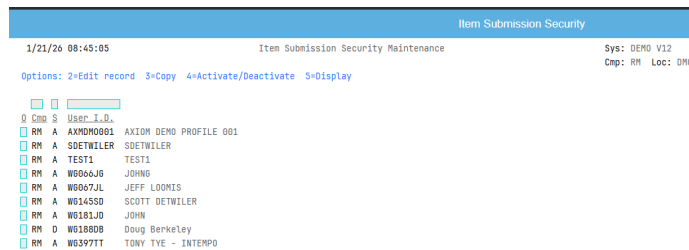
Process Steps

The Item Submission functionality enables controlled creation of new items through an approval workflow. Item requests must be reviewed and approved before they are added to the Item Master. The process integrates with Requisitions and supports email notifications and escalation.

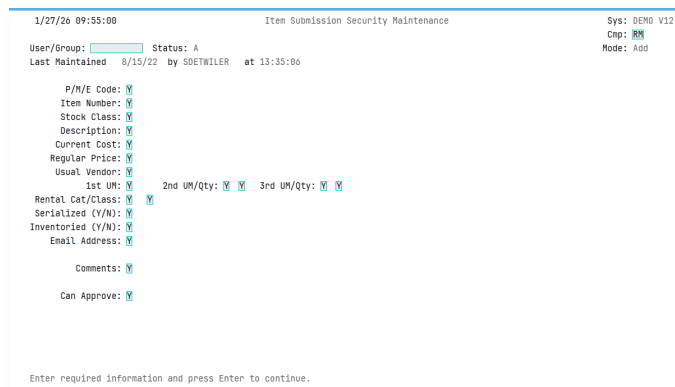
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **System File Maintenance** menu option on the left side of the screen.
3. In the **Security Authorization** section, click on the **Item Submission Security** option.



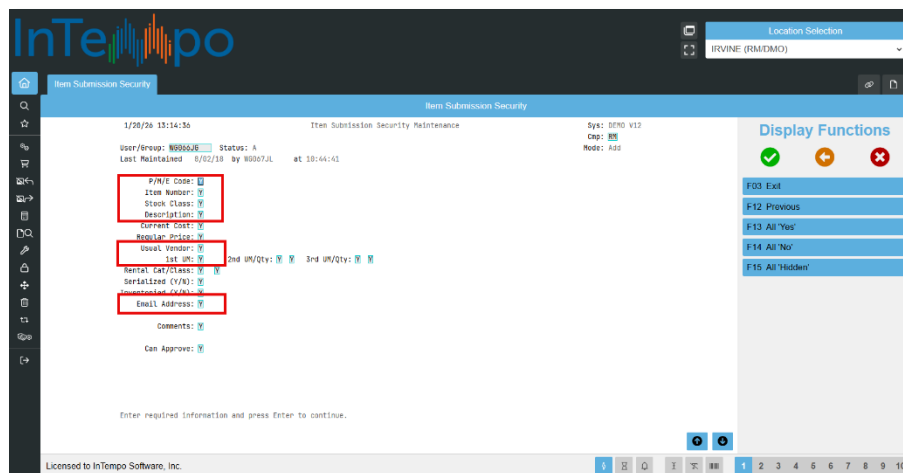
- a. The **Item Submission Security Maintenance - Launch** screen opens.



4. To create a new user, type 3 in the **O** field to copy an existing user and press Enter.
 - a. The **Item Submission Security Maintenance - Details** screen opens showing the settings of the user selected and can be used as a template for the new user.

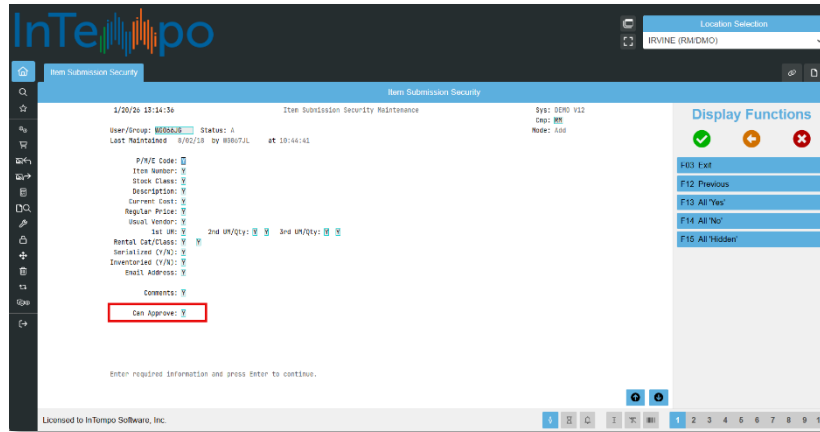


5. **Item Submission Security** must be configured for all users who will request or approve new items.
6. Type in the user's ID in the *User/Group* field.
7. To successfully submit a new item request, users must have access to the following minimum fields. Fields marked with **(XX)** are system-defaulted during item creation and may not require edit access.
 - **(XX)** *P/M/E Code*
 - P = Part
 - M = Merchandise
 - E = Equipment
 - *Item Number*
 - Unique identifier for the item being purchased.
 - *Stock Class*
 - Classification code used for analysis and reporting.
 - *Description*
 - Brief description of the requested item.
 - *Vendor*
 - Vendor or manufacturer account number from the Vendor Master.
 - **(XX)** *Unit of Measure*
 - Base unit in which the item is stocked, sold, or purchased.
 - **(XX)** *Email Address*
 - Defaults from the User System Security File (SYSSECFIL).
 - Must be manually entered if blank.



8. The following fields may be protected but are not required to submit an item:
 - Current Cost
 - Regular Price
 - Secondary and Tertiary Units of Measure
 - Category / Class
 - Serialized Indicator
 - Inventoried Indicator
 - Comments (recommended to assist approvers)

9. Only users flagged with *Can Approve* authority may approve or reject submissions. If you do not want your user to have this authority, type N in the *Can Approve* field. **NOTE:** Approvers will see an enhanced display within the **Item Submission** screen (see section below).



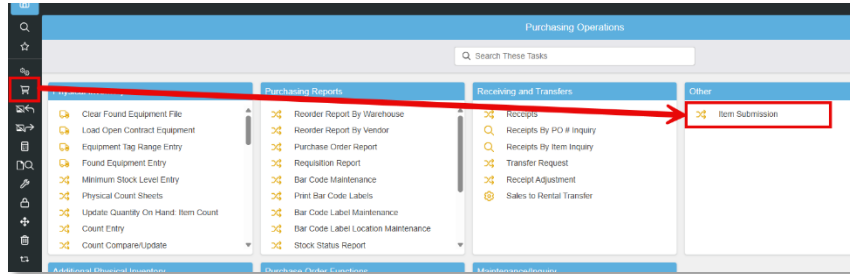
10. Review the information and press Enter to save the record.
 - a. The **Item Submission Security Maintenance - Details** screen closes, the **Item Submission Security Maintenance - Launch** screen displays and the new user's record displays in the list.



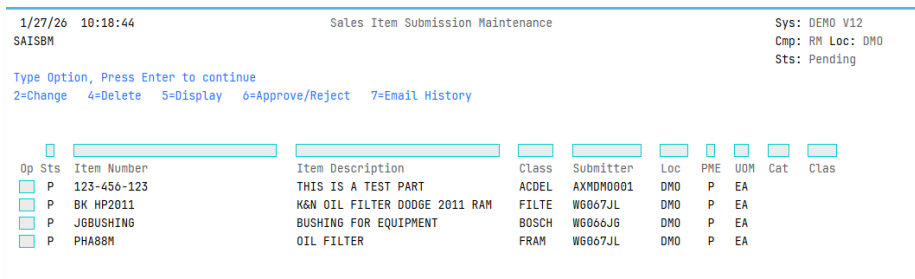
Item Submission Processing

Process Steps

1. From the **Purchasing Operations** menu, in the **Other** section, click on Item Submission.

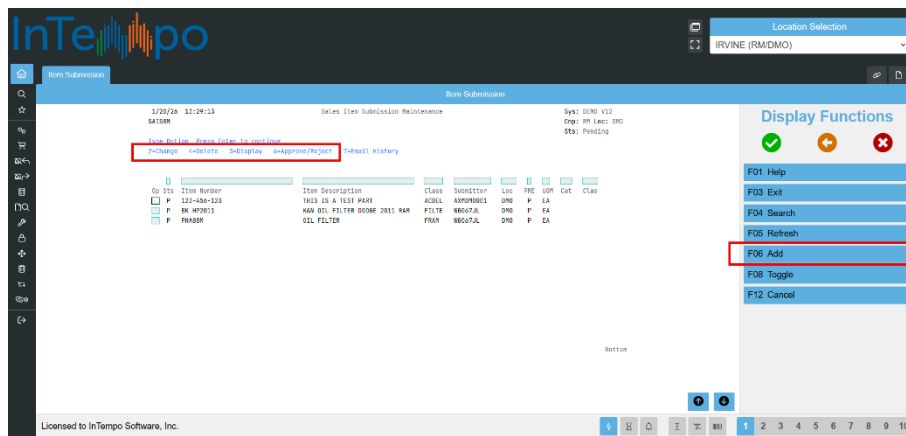


- a. The **Sales Item Submission Maintenance - Launch** screen opens.



2. User capabilities (actions available) depend on **Item Submission Security**:

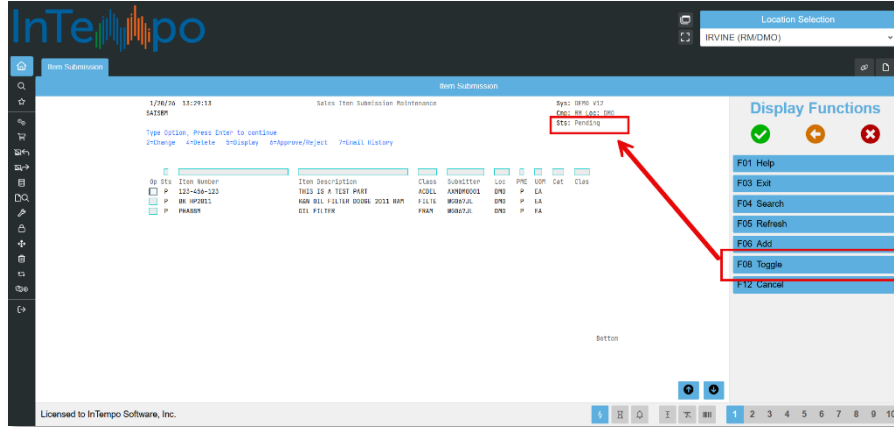
- Users with menu access only may **inquire** on submissions.
- Users with submission security may **add, change, or delete** requests.
- Users with approval authority may **approve or reject** submissions.



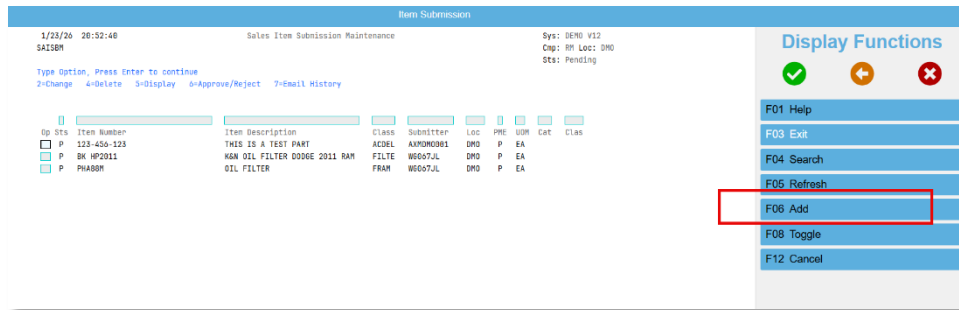
3. **Submission Status Review**

- The default display shows items pending approval.
- Press F8 on your keyboard or click on F08 Toggle in the **Display Functions** menu to toggle between the following statuses:

- Pending
- Approved
- Rejected
- All



4. To add a request press F6 on your keyboard or click on F6 Add in the Display Functions menu.



a. The Sales Item Submission Maintenance pop-up window opens where you will populate the item information you are requesting.

Emp: RM Loc: DMO

Sales Item Submission Maintenance

P/N/E Code:

Item Number:

Stock Class:

Description:

Current Cost:

Regular Price:

Usual Vendor:

1st UM: EA 2nd UM/Qty: 3rd UM/Qty:

Rental Cat/Class:

Serialized (Y/N):

Inventoried (Y/N):

Email Address:

Comments:

Last Maintained By:

5. Type in the details for your item and press Enter to save the entry.

a. The **Item Submission Location Selection** screen displays where you will need to select the location for your item by typing 1 in the **O** field next to the desired location and pressing Enter.

```

1/27/26 10:51:01                               Item Submission Location Selection                               Sys: DEMO V12
                                                Cmp: RM Loc: DMO

Item number: 987-654-321
Description: TESTING ITEM SUBMISSION
Options: 1-Select Location
O Loc_ Name                               O Loc_ Name                               O Loc_ Name
 0049 SAN MARCOS                     RG3 IRVINE
 BAT RENTALMAN CORP                       TES2 DEMO LOCATION
 BRAZ BRAZIL LOCATION                           TEST DEMO LOCATION
 BSM BIRMINGHAM LOCATION
 DMO IRVINE
 EURO EURO LOCATION
 EXEB LOCATION NAME
 FTN RENTALMAN FOUNTAIN VALLEY
 HHT DP NICOLI CORP
 HOU HOUSTON
 HTB HUNTINGTON BEACH
 LGB LONG BEACH
 LSV DP NICOLI
 MAS DETROIT
 RAMI SWEDEN
    
```

b. The **Sales Item Submission Maintenance - Launch** screen displays and the new entry is in the table with a *Status* of **P** (pending).

```

1/27/26 10:54:37                               Sales Item Submission Maintenance                               Sys: DEMO V12
SAISBM                                                Cmp: RM Loc: DMO
                                                Sts: Pending

Type Option, Press Enter to continue
2=Change 4=Delete 5=Display 6=Approve/Reject 7=Email History
    
```

Op	Sts	Item Number	Item Description	Class	Submitter	Loc	PME	UOM	Cat	Clas
<input type="checkbox"/>	P	123-456-123	THIS IS A TEST PART	ACDEL	AXMDM0001	DMO	P	EA		
<input checked="" type="checkbox"/>	P	987-654-321	TESTING ITEM SUBMISSION	ACBAT	RM0001DA	DMO	E	EA	9	100
<input type="checkbox"/>	P	BK HP2011	K&N OIL FILTER DODGE 2011 RAM	FILTE	W6067JL	DMO	P	EA		
<input type="checkbox"/>	P	JGBUSHING	BUSHING FOR EQUIPMENT	BOSCH	W6066J6	DMO	P	EA		
<input type="checkbox"/>	P	PHA88M	OIL FILTER	FRAM	W6067JL	DMO	P	EA		

6. To editing an entry, type 2 (change) in the **Op** field next to the desired item and press Enter.

```

Item Submission
Sales Item Submission Maintenance                               Sys: DEMO V12
SAISBM                                                Cmp: RM Loc: DMO
                                                Sts: Pending

Type Option, Press Enter to continue
2=Change 4=Delete 5=Display 6=Approve/Reject 7=Email History
    
```

Op	Sts	Item Number	Item Description	Class	Submitter	Loc	PME	UOM	Cat	Clas
<input checked="" type="checkbox"/>	P	123-456-123	THIS IS A TEST PART	ACDEL	AXMDM0001	DMO	P	EA		
<input type="checkbox"/>	P	BK HP2011	K&N OIL FILTER DODGE 2011 RAM	FILTE	W6067JL	DMO	P	EA		
<input type="checkbox"/>	P	PHA88M	OIL FILTER	FRAM	W6067JL	DMO	P	EA		

- a. This will open the **Sales Item Submission Maintenance** pop-up window for the item selected.

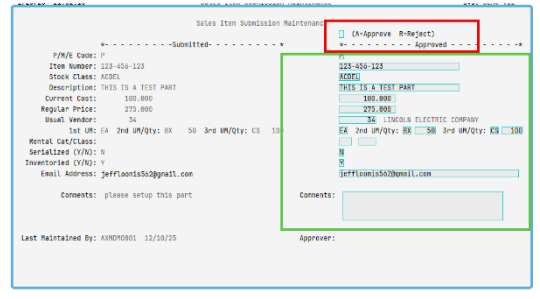
- 7. Users may enter or update only the fields to which they have access. **NOTE:** This is determined during **Item Submission Security** (see section above).
- 8. Enter or update the desired information and press Enter to save changes.
 - a. The **Sales Item Submission Maintenance** pop-up window closes and the entry displays in the table as updated on the **Sales Item Submission Maintenance - Launch** screen.

Op	Sts	Item Number	Item Description	Class	Submitter	Loc	PNE	UOM	Cat	Clas
P		123-456-123	THIS IS A TEST PART - EDITED	ACDEL	AXMDM0001	DMO	P	EA	9	100
P		987-654-321	TESTING ITEM SUBMISSION	ACBAT	RR0001DA	DMO	E	EA		
P		BK HP2011	K&N OIL FILTER DODGE 2011 RAM	FILTE	W6067JL	DMO	P	EA		
P		JGBUSHING	BUSHING FOR EQUIPMENT	BOSCH	W6066J6	DMO	P	EA		
P		PHABBN	OIL FILTER	FRAM	W6067JL	DMO	P	EA		

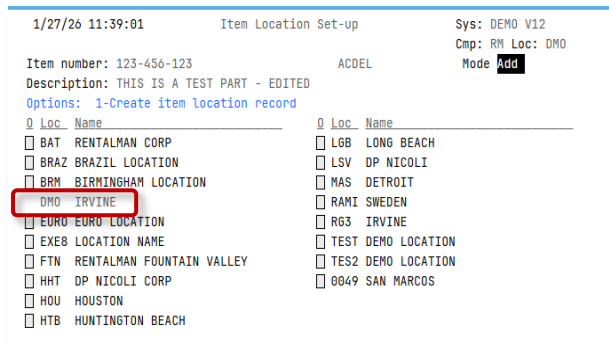
- b. Upon submission, notification emails can be sent to designated approvers indicating an item is pending approval.
- 9. Once the item is submitted for approval, the approver can select and either approve or reject the entry by typing 6 (Approve/Reject) in the **Op** column next to the entry and pressing Enter.

Op	Sts	Item Number	Item Description	Class	Submitter	Loc	PNE	UOM	Cat	Clas
6	P	123-456-123	THIS IS A TEST PART	ACDEL	AXMDM0001	DMO	P	EA		
		BK HP2011	K&N OIL FILTER DODGE 2011 RAM	FILTE	W6067JL	DMO	P	EA		
		PHABBN	OIL FILTER	FRAM	W6067JL	DMO	P	EA		

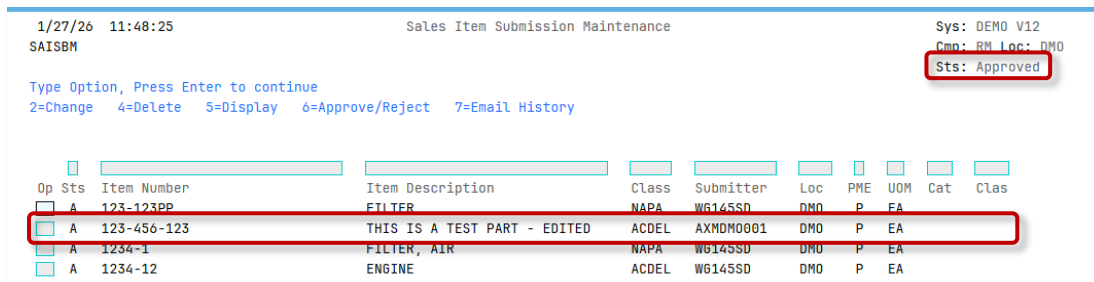
- a. The **Sales Item Submission Maintenance - Approval** pop-up window opens with the *Approve/Reject* field (in Red) and allow any changes for the approver to make before the item is created (In Green).



- 10. Make any desired changes and press Enter to save.
 - a. The **Sales Item Submission Maintenance - Approval** pop-up window closes, the **Sales Inventory Maintenance - Item Detail** screen displays in *Add Mode*.
- 11. If desired, add any additional information for the item and press Enter twice to save.
 - a. The **Item Location Set-up** screen displays where you can select the locations for your item by typing 1 in the *O* field next to the desired location and pressing Enter.
 - b. Any selected location(s) will be slightly grayed-out, and the *O* field will not be available. You can select additional locations or press Enter to continue.



- 12. The **Item Location Set-up** screen closes, the **Sales Item Submission Maintenance** screen displays in *Mode Pending* and the item no longer displays as pending. **NOTE:** To see your item in the master list, press F8 on your keyboard or click on F08 Toggle in the **Display Functions** menu until the status you selected above displays and your item will be in the table. **NOTE 2:** For my example, I entered **A (approved)**.

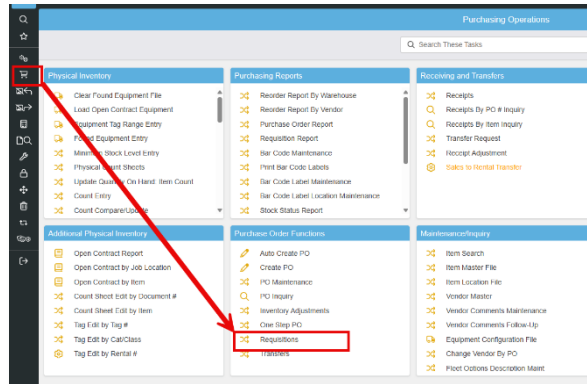


- 13. Upon completion, the requesting user receives an email notification indicating approval or rejection and notification history for the item is available for review.

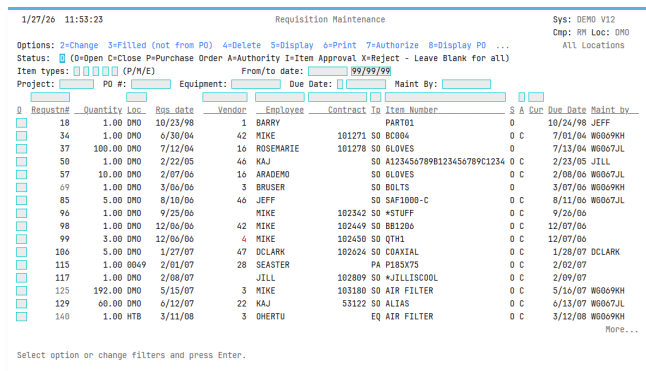
Requisitions Integrations

Process Steps

1. On the **Purchasing Operations** screen, in the **Purchase Order Functions** section, click on the Requisitions option.



- a. The **Requisition Maintenance** screen opens displaying a list of existing requisitions in the system.



2. To enter a new requisition, press F6 on your keyboard or click on F06 Add New Requisition in the **Display Functions** menu.



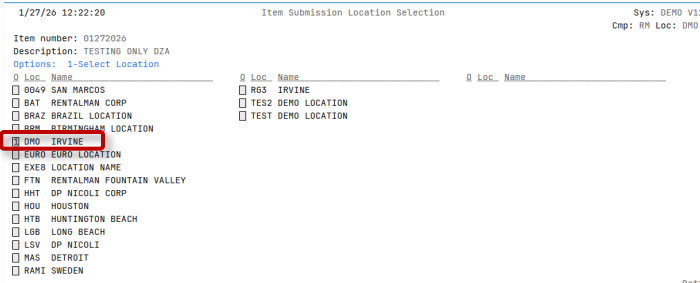
- a. The **Requisition Entry** screen opens in **Mode ADD**.

3. Type in the *Requisition type* field, pressing F4 to search if necessary.
4. Type in a unique *Item Number* and *Stock Class* combination.

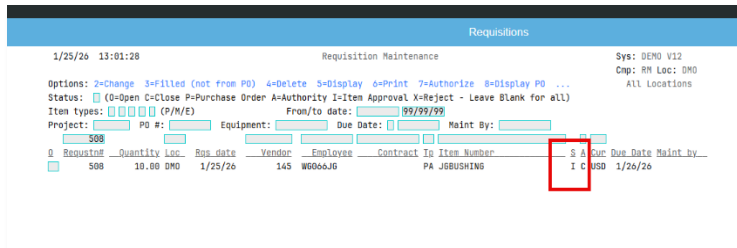
5. Type in any additional information desired and press Enter to continue.
 - a. The system will prompt the user to submit a new item request.

6. To submit the item request, type Y in the field and press Enter.
 - a. The **Sales Item Submission Maintenance** pop-up window displays.

7. Enter any additional information and press Enter.
 - a. The **Sales Item Submission Maintenance** pop-up window closes and the **Item Submission Location Selection** screen displays where you can select the locations for your item by typing 1 in the **O** field next to the desired location and pressing Enter.



- b. The **Item Submission Location Selection** screen closes and the **Requisition Entry** screen displays.
8. Complete required fields and press Enter to submit the request.
9. The requisition will be added, and you can either enter another item or press F12 to exit.
 - a. The **Requisition Maintenance** screen displays and the requisition displays in the table with a **Status of I (Item Submission Pending)**.



10. Once the item is approved:
 - a. The requisition status updates to:
 - i. A - Authorized
 - ii. O - Open

Reference Glossary

Field Definitions for Tasks

Requisition Maintenance

Filters

- **Status** - Enter the status code for the type of requisitions you want to review. Leave the field blank to review all requisitions. Valid codes are:
 - O=Open. Requisition is waiting to be authorized or put on a purchase order.
 - C=Closed. Requisition is closed. A requisition can be closed manually using Option 3 on this screen. It closes automatically when the item on the requisition is received.
 - P=Purchase Order. The requisition item has been added to a purchase order.
 - A=Authority. The requisition must be authorized by someone with the appropriate authorization level before it can be added to a purchase order.
- **Item Types** - Enter one or more type codes for the item requisitions you want to review. Leave the fields blank to review requisitions regardless of item type. Valid codes are:
 - P - Parts
 - M - Merchandise
 - E - Equipment
 - * - Non-stock items
- **From/To Date** - Enter a range of dates in which you want to review requisitions.
- **Project** - If applicable, enter the number of the project for which you want to review requisitions.
- **Purchase Order Number** - If applicable, enter the number of the purchase order for which you want to review requisitions.
- **Equipment** - If applicable, enter the number of the equipment for which you want to review requisitions.

Requisitions List

- **Requisition Number** - Displays the number assigned to the requisition.
- **Quantity** - Displays the quantity that was requisitioned for the item.
- **Location** - Displays the location where the requisition was entered.
- **Requisition Date** - Displays the date the requisition was entered.
- **Vendor** - Displays the number of the vendor entered on the requisition.
- **Employee** - Displays the name of the user who entered the requisition.
- **Contract** - If applicable, this field displays the contract associated with the requisition.
- **Type** - Displays the code that represents the type of requisition. These are user-defined codes set up using miscellaneous reason code type RT.

- *Item Number* - Displays the number of the item that was requisitioned.
- *Status* - Displays the current status of the requisition. Valid statuses are:
 - A - Authorized
 - C - Closed
 - D - Deleted
 - O - Open
- *Approval Level* - Displays the code that represents the approval level needed for the requisition. Valid codes are:
 - C - Corporate
 - D - District
 - L - Location
 - R - Region
- *Due Date* - Displays the date that the items on the requisition are needed.
- *Maintained By* - Displays the name of the user who last maintained the requisition.

Requisition Entry

- *Requisition Number* - Displays the number of the requisition when the program is in **CHANGE** mode, and you are updating an existing requisition. When you are adding a new requisition, and your system is not set to automatically assign requisition numbers, enter a unique number for the requisition.
- *Status* - Displays the status of the requisition when the program is in **CHANGE** mode, and you are updating an existing requisition.
- *Location* - Enter the location that is making the requisition.
- *Requisition Type* - Enter the code that represents the type of requisition you are entering. These are user-defined codes set up using miscellaneous reason code type RT.
- *Project Number* - If applicable, enter the number of the project for which the requisition is being made.
- *Contract Number* - If applicable, enter the sales or rental contract for which this requisition is being made. When a sales order is entered for an item, and there is insufficient quantity on hand to fill the order, the system automatically calls this **Requisition Entry** screen and populates this field with the sales contract number.
- *Requisition Date* - Enter or accept the date that the requisition was made.
- *Required Date* - Enter or accept the date that the item on the requisition is required to be delivered. Settings in control record **POREQ1** determine whether a date defaults in this field and how many days to add to the requisition date to determine this date.
- *Expire Date* - Enter or accept the date that the requisition expires. Settings in control record **POREQ1** determine whether a date defaults in this field and how many days to add to the requisition date to determine this date.
- *For Equipment Number* - If applicable, enter the number of the equipment for which you are requisitioning items. If you do not know the number, press F4 to search for it.

- *Vendor Requested* - Enter the number of the vendor from which the requisitioned items should be ordered. You can leave this blank, and if the master record or location record for the entered item contains a primary vendor, this field is populated with that vendor number.
- *Item Number* - Enter the number of the item you are requisitioning. If you do not know the item number, press F4 to search for it. If you want to enter more than one item on the requisition, press Enter when all other information is entered, and this *Item Number* field clears for additional entries.
- *Stock Class* - Enter or accept the stock class for the entered item.
- *Item Description* - Displays the description for the entered item.
- *Stock Class Description* - Displays the description for the entered stock class.
- *Quantity Requested* - Entered the quantity of the item needed on this requisition.
- *Unit of Measure* - Enter or accept the purchasing unit of measure for the item.
- *Cost* - Displays the cost of the item based on the entered unit of measure.
- *Order Unit of Measure Quantity* - Displays the unit of measure conversion quantity. For example, if the item is stocked in eaches, but you order it in boxes of 100, and you changed the Unit of Measure field to BX for boxes, this field would display 100. This information comes from the item's master or location record.
- *Total Quantity Requested* - Displays the total calculated quantity for the requisition based on the quantity requested, the unit of measure, and the unit of measure conversion quantity. This quantity is displayed in the item's stocking unit of measure.
- *Minimum Order Quantity* - Displays the lowest quantity to order from the vendor. This is the manufacturer's pack quantity from the item's master record.
- *PME Code* - Displays the item's Parts, Merchandise, Equipment code. This field might also display an asterisk (*), which indicates a non-stock item.
- *Comments* - Enter comments applicable to the requisition.