Create Inventory Item

PURPOSE: Use this job aid to learn how to create an Inventory Item

1. From the Facilities Connect Home screen, click on:
   - Inventory
   - Items

2. The Item screen displays. Click on:
   - Add
Complete all required (marked with *) and applicable fields on the **General** tab. Scroll the screen down to see all the required fields.

1) **ID** (auto-generate when entry is “activated”)
2) **Name**
   - Fit, Form, Function/Category 3, Category 2, and Size Specifications
3) **Description** [(same as Name + any information relevant for the part (e.g., Vendor, part #, Manufacturer # etc.))]
4) Update **Units** section
5) **Specification (Stock Item)** section:
   - Click on Find
   - Enter Spec Name - click radio button - click OK
6) **Primary Inventory Location (Storeroom)** section:
   - Click on Find
   - Enter Inv Location Name - click radio button - click OK
7) **Inventory Location (bin, shelf, cabinet,...)** section:
   - Click on Find
   - Enter Inventory Location ID - click radio button - click OK
8) **Details** section:
   - ABC Class – Enter if information is available
   - Service Class – information pulled over from Spec ID
   - **Inventory Valuation Method**
     - Average = does not require UOM conversion
     - LIFO = requires UOM conversion
   - **Inventory Type**
     - Asset (Assignable) – Direct parts
     - Asset (Reservable) – Stock parts
     - Consumable - Benchstock
     - Vendor Managed – Vending machine
   - Contains Hazardous Material – Required to answer
   - **Storeroom Type:**
     - Self-Managed - Warehouse
     - Managed - Vendor

For more information, visit the Facilities Connect website at www.northwestern.edu/fm/connect
4. Continued from 3.... complete all required (marked with *) and applicable fields on the General tab. Scroll the screen down to see all the required fields.

9) Critical – Required
10) Seasonal – Required:
   • Select Month(s)
11) Lead Time: Enter if information is available
12) Unit of Measure Quantity: Required
13) Unit of Purchase Quantity: Required
14) Purchasing Reorder Logic: Defaults to ROP
15) Purchasing Reorder Point (ROP): Required
16) Stock Category:
   • Stocked = Stock
   • Non Stocked = Direct Part

5. Optional: Click on any of the other tabs (Asset Details, Contacts, Notifications, Notes & Documents) and enter desired information.
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6. When you have completed all required and optional fields, click on:
   - 5. Create Draft

7. Click on:
   - 6. Activate