Department of Administrative Services

PROCUREMENT TRAINING 2014

Inventory

Core-CT

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Agenda

- Best practices when using the inventory module
- Identifying agencies inventory item requirements
- Tools available to assist identify and maintain the items
- Reporting

Best Practices

- Items carried in inventory should turn over several times a year
- Minimums and Maximums of items should be reviewed and updated to support the inventory needs of the agency
- Be proactive when establishing new inventory needs

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Item Requirements

- Identify
- Review & Analyze
- Communicate

Tools to identify your requirements

- EPM Queries have been created to assist with this task including:

  CT_DAS_PO_BY_CONTRACT_ITEMS_1

  CT_CORE_FIN_INV_REQUIREMENT

Inventory Reporting

- Delivered PeopleSoft reports include Item Balance & Negative Balance report
  - Navigation: Core-CT Financials > Inventory > Manage Inventory > Reports > Inventory Balances
  - Navigation: Core-CT Financials > Inventory > Manage Inventory > Reports > Negative Balances
- Custom reports include the Core Inventory Min/Max & Manual Replenishment reports
  - Navigation: Core-CT Financials > Inventory > Manage Inventory > Reports > Core Inventory Min/Max
  - Navigation: Core-CT Financials > Inventory > Manage Inventory > Reports > Manual Replenishment

EPM Inventory Queries

- Are typically developed to meet an agency specific reporting requirements.
  - Example: CT_DOC_INV_USAGE_INFO_DEPT_ID
  - Example: CT_DOC_INV_USAGE_INFO_ITEM_ID
- Several queries, such as an ***Agency Item Catalog,*** can be used by all agencies
  - Example: DOTOTH_11_STORES_CATALOG

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Any Questions?

http://footprints.ct.gov/footprints

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