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MATERIAL REQUEST

Version 3



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Description

The Material Request Process manages the lifecycle of material requests within the organization, from the initial request submission through to the fulfillment of those requests, either from existing inventory or via external procurement. This process ensures that materials are available to the requester when needed, streamlining inventory management and procurement actions.

Purpose:

The Material Request Process ensures that employees or departments can request and receive materials quickly and efficiently. It determines whether the requested materials are available in stock and, if not, triggers a purchase order. This process aims to optimize the flow of materials, reduce delays, and improve internal and external coordination in fulfilling material needs.

Key Roles and Responsibilities:

- Requestor (Request Processing Pool):
The Requestor initiates the process by submitting a request for materials. They provide the necessary information (e.g., material type, quantity, urgency) and are responsible for confirming the requested items.
- Warehouse (Request Processing Pool):
The Warehouse team checks the availability of the requested materials. If the materials are in stock, they fulfill the request. If not, they trigger the procurement process.
- Purchasing Staff (Purchase Process Pool):
The Purchasing Staff is responsible for sourcing materials that are out of stock. They handle the ordering process, coordinate with suppliers, and ensure timely delivery of the materials to the Warehouse.

Key Steps:

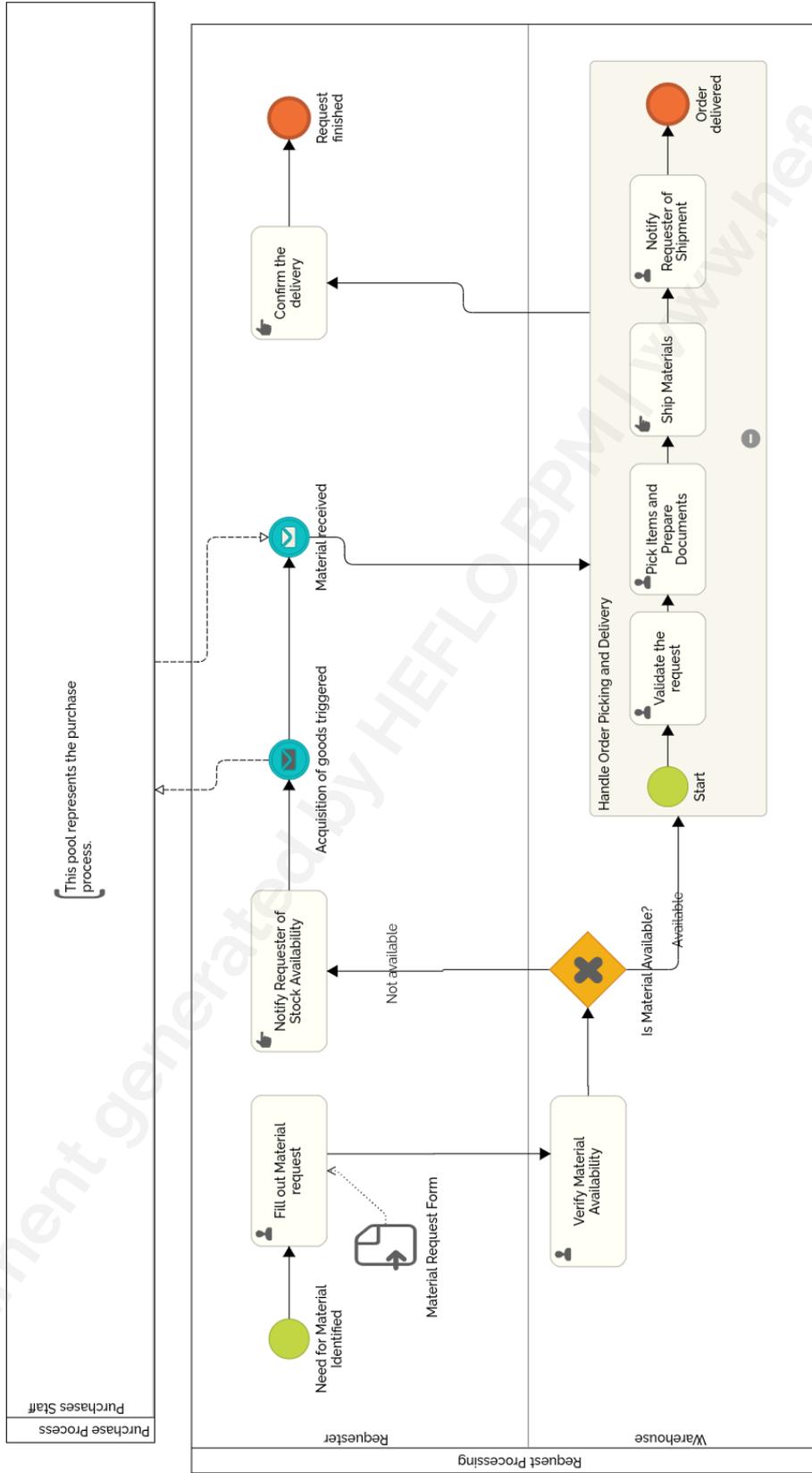
1. **Material Request:** The Requestor submits a request for materials.
2. **Stock Check:**
The Warehouse checks if the requested items are available.
 - If available, the request is fulfilled.
 - If not available, the **Purchasing Staff** is notified.
3. **Procurement:** The **Purchasing Staff** orders the materials from external suppliers.
4. **Material Arrival:** Upon receiving the materials, the Warehouse confirms the delivery and fulfills the request.
5. **Completion:** The Requestor is notified when the materials have been delivered.

Benefits:

- **Efficiency:** Streamlines Material Request and fulfillment by clearly defining roles.
- **Stock Management:** Reduces the chances of running out of stock, as it integrates both internal stock checks and external procurement.
- **Transparency:** Provides visibility into the status of material requests and the procurement process.

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Diagram



TASKS AND EVENTS

Request Processing

This pool represents the team or department responsible for handling the Material Request process, including submitting, reviewing, and confirming requests for materials. It processes the initial request before moving it to the next stage.

Need for Material Identified

Performer
Requester

This is the starting point of the process, triggered manually by an employee who identifies the need for specific materials. At this stage, the employee takes the initiative to begin the request process, typically by accessing a form or system interface to provide the details of the materials required (e.g., item type, quantity, urgency, and justification). This action does not occur automatically or on a schedule — it depends entirely on human intervention.

Fill out Material request

Performer
Requester

In this task, the employee must fill out the Material Request Form to formally initiate the request. The form is typically accessed through the company's internal system (e.g., ERP or procurement portal).

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To complete the task correctly, the requester must:

1. **Access the request form** through the designated platform or system.
2. **Enter the following mandatory information**
:
 - **Material name or code** (must match inventory/catalog naming)
 - **Requested quantity** (units must be appropriate and measurable)
 - **Intended use or justification** for the request
 - **Urgency level** (e.g., low, normal, urgent)
 - **Cost center or department** responsible for the request
3. **Add any relevant supporting information**, such as preferred suppliers, technical specifications, or links to reference documentation (if applicable).
4. **Review the form** for completeness and accuracy before submitting.
5. **Save or submit** the request as required by the system to trigger the next step in the workflow.

Guidance:

- Ensure all information provided is clear and accurate to prevent delays.
- If uncertain about the material details, consult your department supervisor or the procurement team before submission.
- Incomplete or unclear requests may be rejected during approval.

Verify Material Availability

Performer
Warehouse

This task involves verifying whether the requested materials are available in stock. The goal is to determine if the request can be fulfilled directly from existing inventory or if procurement is required.

Instructions for Execution:

1. **Access the Material Request:**
Open the submitted request in the inventory or procurement system and review the list of requested items.
2. **Search Inventory Records:**

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For each requested item, consult the inventory database or stock management system to check:

- Current stock levels
- Storage location(s)
- Reserved quantities (if applicable)
- Batch or expiration details (if relevant)

3. Determine Availability Status:

- If **all items are available in sufficient quantity**, mark them as "Available".
- If **some or all items are unavailable**, note which ones are out of stock or have insufficient quantity.

4. Record the Results:

Update the request record to reflect stock availability. Include any relevant comments, such as partial availability, alternative items in stock, or expected restocking dates (if known).

5. Route the Process Forward:

- If items are fully available → forward to fulfillment or delivery.
- If not → forward the request to the Procurement Department for sourcing.

Notes:

- Be sure to check for any item reservations or pending requests that may impact availability.
- Follow internal stock-checking procedures to ensure data accuracy.
- For items stored across multiple locations, check consolidated availability.
- If system integration is not available, coordinate with Warehouse personnel directly.

Notify Requester of Stock Availability

Performer
Requester

This task involves communicating to the requester that the requested materials are currently available in stock and will be processed without the need for additional purchasing.

Instructions for Execution:

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- Open the original Material Request and review the availability status.
- Use the internal messaging system or predefined email template to notify the requester.
- Include the following details in the message:
 - List of available items
 - Estimated timeline for delivery or pick-up
 - Contact person for any follow-up
- Mark the notification as sent in the system to ensure process continuity.

Note: This task may be automated in some systems. If so, ensure that message templates are configured correctly and include all required information.

Acquisition of goods triggered

Performer
Requester

This message event is responsible for sending a message to the **Purchase Process**, notifying it to begin sourcing materials that are unavailable in stock. It acts as a trigger to initiate procurement, ensuring the fulfillment of the Material Request.

Instructions for Execution:

- Once the flow reaches this event (after confirming items are unavailable), the system automatically sends a message to the **Purchase Process**.
- The message includes the following information:
 - **Material names or codes** for the missing items
 - **Required quantities**
 - **Urgency or delivery dates**
 - **Any specific procurement instructions** (e.g., preferred suppliers, specific conditions)
- The message ensures that the procurement team is immediately aware of the need to acquire the items.

Purpose:

- This event plays a crucial role in the continuous flow of the process, ensuring that procurement is initiated seamlessly when stock is insufficient, without manual intervention.

Material received

Performer
Requester

This intermediate event is triggered when the **Purchase Process** has successfully received the ordered materials and sends a message confirming their arrival. The event marks the point in the process where the materials are now available for further processing (such as inventory stocking or Order Fulfillment).

Instructions for Execution:

- When the materials are delivered to the Warehouse, the **Purchase Process** sends a message back to this intermediate event.
- This message includes the following information:
 - **List of received items** with item codes and quantities
 - **Date of receipt**
 - **Condition of the items** (if any quality check or inspection is required)
- The event listens for this message to confirm that materials have been received.

Purpose:

- It marks the point where the fulfillment process can continue, either by moving materials into inventory, starting the order picking process, or shipping the materials to the requester.
- This event ensures that the system is aware of the materials' arrival and can trigger subsequent actions, such as updating inventory records or preparing for order shipping.

Handle Order Picking and Delivery

Performer
Warehouse

This subprocess handles the internal logistics required to fulfill the Material Request when items are not available in stock. It ensures the requested materials are sourced, prepared,

and delivered to the requester.

Included Activities (High-Level):

1. **Initiate Purchase Order** – Trigger a procurement request to the appropriate supplier or purchasing department.
2. **Receive Items** – Confirm delivery of the ordered materials at the receiving location.
3. **Pick Items for Delivery** – Locate and separate the items from inventory or receiving for shipment.
4. **Ship Materials to Requester** – Organize internal or external delivery of the requested items to the requester's location.

Note: The subprocess may involve coordination between procurement, receiving, and Warehouse operations. Accurate tracking of steps and communication with stakeholders is essential for timely delivery.

Validate the request

The purpose of this task is to ensure that the Material Request contains all the required information for fulfillment. The validation includes checking the accuracy of item codes, quantities, requester details, and delivery instructions.

Instructions for Execution:

- Open the Material Request in the system.
 - Confirm that all required fields are complete and accurate.
 - Ensure that the request aligns with internal policies (e.g., authorization level, valid cost center).
 - If the request is valid, mark it as approved for fulfillment.
 - If issues are found, return the request for correction or escalate as needed.
-

Pick Items and Prepare Documents

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This task involves physically retrieving the requested items from stock and preparing the required shipping or transfer documentation (e.g., packing list, internal transfer note).

Instructions for Execution:

- Access the validated request in the system.
- Locate and retrieve the items from their designated storage areas.
- Verify quantities and item codes against the request.
- Prepare necessary documentation, such as:
 - Packing slip
 - Internal delivery form
 - Barcode labels or tracking ID (if applicable)
- Place the items in the designated dispatch area and attach the documentation.

Note: If any item is missing or damaged, report it immediately to the supervisor.

Ship Materials

This task handles the physical dispatch of the picked items to the requester. It may involve internal transportation or external courier services depending on the organization's setup.

Instructions for Execution:

- Collect the prepared items and accompanying documents.
- Arrange transport to the requester's location, ensuring proper handling and tracking.
- If using a third-party courier, generate and attach the shipping label and tracking number.
- Update the system to reflect that the materials have been shipped, including date and time.

Notify Requester of Shipment

After the materials have been shipped, the requester must be informed. This task ensures

transparency and enables the requester to anticipate delivery.

Instructions for Execution:

- Send a notification to the requester using the standard communication method (e.g., email or internal messaging).
- Include the following details:
 - Shipment confirmation
 - Expected delivery date
 - Tracking number (if applicable)
 - Contact information for follow-up
- Log the communication in the request record.

Confirm the delivery

Performer
Requester

This task involves confirming that the delivered materials have reached the requester or intended recipient. It ensures that the delivery process has been successfully completed and that all necessary parties are notified.

Instructions for Execution:

- Upon receiving confirmation that the materials have been delivered (from the delivery team or courier), verify the details of the shipment.
- Ensure that the delivered items match the original order, including:
 - **Item names and quantities**
 - **Condition of the items** (e.g., no damage or discrepancies)
 - **Delivery time and location**
- If everything matches, record the confirmation in the system to update the status of the order.
- If there are any issues (e.g., missing items, incorrect delivery), immediately report them to the logistics team or the requester to resolve the problem.
- Notify the requester that the delivery has been confirmed, including any relevant tracking information or issues (if applicable).

Purpose:

- This task serves as a final step in the fulfillment process, ensuring that the requester is satisfied with the delivery and that the system is updated with the correct delivery status.
 - It prevents the process from being marked as complete until all aspects of the delivery are confirmed.
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Purchase Process

This pool represents the procurement team responsible for sourcing and purchasing materials when they are unavailable in stock. The purchasing process handles orders, suppliers, and the overall fulfillment of material requests.

PERFORMERS

Requester

The Requestor lane represents the individual or department that initiates the Material Request process. This person or team is responsible for submitting a request for materials and providing necessary information such as item codes, quantities, and required delivery details.

Key Responsibilities:

- Filling out the Material Request form
- Reviewing and confirming details for the requested items
- Communicating with the Warehouse regarding item availability and delivery expectations

Warehouse

The Warehouse lane represents the team or department responsible for managing stock and fulfilling the Material Request. This role typically involves verifying stock availability, picking items, and preparing shipments.

Key Responsibilities:

- Validating material requests and checking stock levels
- Picking requested items from inventory
- Preparing shipment documentation
- Coordinating with the purchasing team if items are not available in stock

Purchases Staff

The **Purchases Staff** lane represents the team or department responsible for handling

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procurement when items are out of stock. This team ensures that materials are ordered and delivered from external suppliers as needed.

Key Responsibilities:

- Ordering missing items from external suppliers
- Tracking the procurement and delivery status of items
- Communicating with the Warehouse once materials are received
- Ensuring the purchasing process aligns with internal procurement policies

GLOSSARY

Material Request

A formal request submitted by a **Requestor** to obtain specific materials needed for an activity, project, or operational requirement. This document outlines the material type, quantity, and required delivery details.

Requestor

The individual or department that submits a request for a necessary items. The **Requestor** is responsible for providing all relevant details about the items needed.

Warehouse

The department or team responsible for managing inventory, verifying the availability of materials, and fulfilling requests when items are available. They also play a role in coordinating procurement when materials are not in stock.

Order Fulfillment

The process by which the **Warehouse** picks and prepares the requested items for delivery to the **Requestor**. It includes ensuring that the items are properly documented and ready for shipping.



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