



Infor EAM Inventory Management User Guide

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Introduction

Welcome to the **Infor EAM Inventory Management Handheld Device User Guide**. This document is intended to help you use the **Inventory** mobile application that is included in the **Advanced Mobile for Enterprise Asset Management** solution.

Typographical Conventions

Bold type represents on-screen items. For example:

Click the **Build Report** tab.

Courier font indicates text to be typed exactly as shown. For example:

Run the following script: upg550.sql

Italic type indicates emphasis or variables. For example:

To restrict the row to the product category, type 1100, [CATEGORY]

NOTE: *In the above example, CATEGORY is a variable.*

Cascaded menu items are **Bold and separated by arrows (>)**. For example:

Select **File > Save**

Contacting Infor Global Solutions

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Overview

Advanced Mobile for EAM Inventory is a comprehensive mobile solution that extends EAM Inventory functionality to the mobile workforce.

The Mobile Inventory application can be deployed on a wide variety of Windows Mobile-powered handheld computing devices to facilitate the creation, receipt, review and modification of EAM Inventory data in the field.

Synchronization of data for this application is handled seamlessly by SOA (Services-Oriented Architecture) services hosted within the Advanced Mobile Integration Engine and by the standard EAM Web Services. As such, the host EAM system can be on-premises or a hosted SaaS (Software as a Service) solution.

The following document provides comprehensive data flows, screen shots and step-by-step instructions on using the handheld version of Advanced Mobile for EAM Inventory.

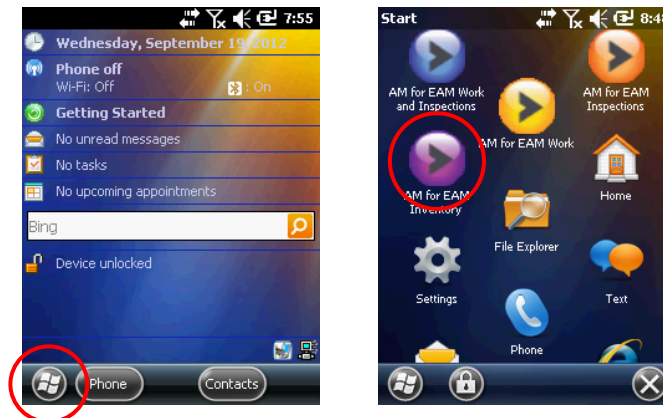
System Requirements

The following components are required to run the Advanced Mobile for EAM Inventory solution:

- Infor EAM 8.5 (or later) Enterprise Edition.

Starting the Mobile Application

Once the **Inventory for EAM** application has been installed on the device, click the **Windows Mobile Start Menu** button and select **AM for EAM Inventory**



Windows Mobile Start & Programs Menu

- ☞ To start the mobile application, click the application icon once
- ☞ A screen titled **Advanced Mobile Inventory** should appear within 10 to 20 seconds

Application Loading

- ☞ The first time you run Inventory, you will see the **Application Loading Screen**,



Inventory App Loading Screen

NOTE: This can remain for thirty seconds or more depending on your connection and the amount of data involved

- When the **Login** screen appears, enter the same **User ID** and **Password** to log into the mobile application as used to log into Infor EAM

Application
Version Number



Inventory Login Screen

- Click the **Login** button to submit your credentials to the system

NOTES: The credentials are authenticated against Infor EAM, therefore, the device must be connected to the network the first time you log into the device in order to authenticate your credentials.

Successfully authenticated credentials will be securely stored on the device for use in authentication when an active network is not available.

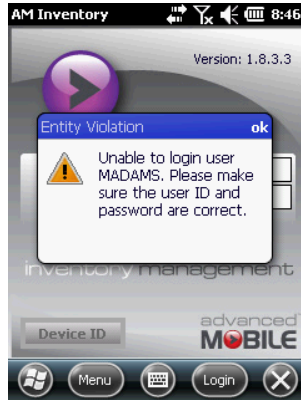
Any time your credentials change in EAM, the device must be connected to the network prior to making changes in order to authenticate your user account and store the updated credentials on the device.

Failure to do so will result in the rejection of all submitted transactions.

- A successful login will allow you to view the organizations for that user – proceed to the **Main Screen Options** on page 12

Login Failure

- ☞ If you see the **Login Failure**, try log in again or contact your System Administrator



Work Management User Login Failure

NOTE: Your Inventory application may not be configured to connect to the proper EAM web service. Please see **Configuration** on page 10 below.

Login Screen Menu Options

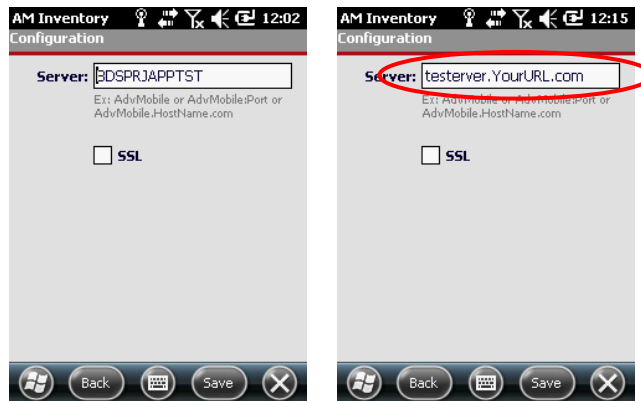
Configuration

- ☞ From the **Login** screen, click the **Menu** button



Login Screen Main Menu

- ☞ Select **Configuration**
- ☞ Enter the appropriate web service **URL** in the **Server** field



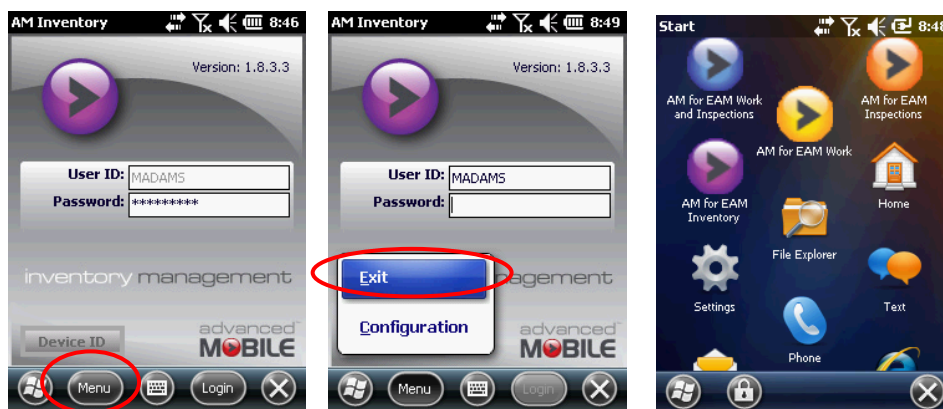
Inventory Connection Configuration

- ☞ Check the **SSL** box if your organization uses **HTTPS** to serve up its data

NOTE: Check with your System Administrator if you don't know about the use of SSL or if you cannot connect

Exit

- ☞ Click on the **Inventory Login Screen Menu** button



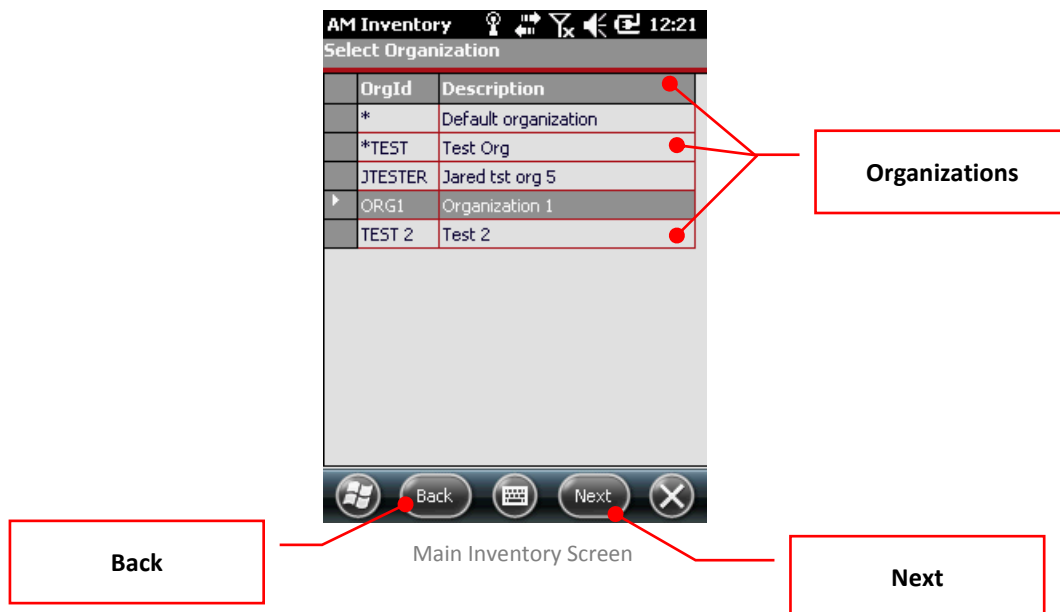
Exit Inventory Menu Item

- ☞ Select **Exit**
- ☞ The system will return you to your device main screen

Inventory Main Screen

Main Screen Options

- Once successfully authenticated, you will be taken to the **Select Organization** screen (also referred to as the **Inventory Main Screen**)



Organization List

- The device will display all organizations that you have been granted access to
- Select an **Organization** to start working with the **Inventory** application

Back (Logging Out)

- The **Back** button from the **Inventory** main screen allows you to log out of the application and return to the **Windows Mobile OS** screen where you started

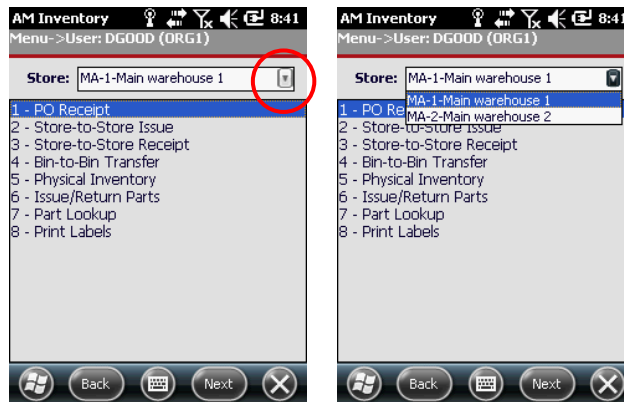
Next

- The **Next** button on the **Inventory** main screen allows you access and work with the selected organization's inventory

Inventory Basic Functionality

Store Selector

- Click the **Store Selector** dropdown to access stores for that organization



Main Inventory Screen

- Select the desired **Store**
- Proceed with whatever operation is needed from this list of options

Device Locked

If left unattended, the application locks itself down to prevent unauthorized access. Only the logged-in user can unlock the application.



Device Locked Message

- ☞ Click **OK**
- ☞ Enter the existing user's **Password**

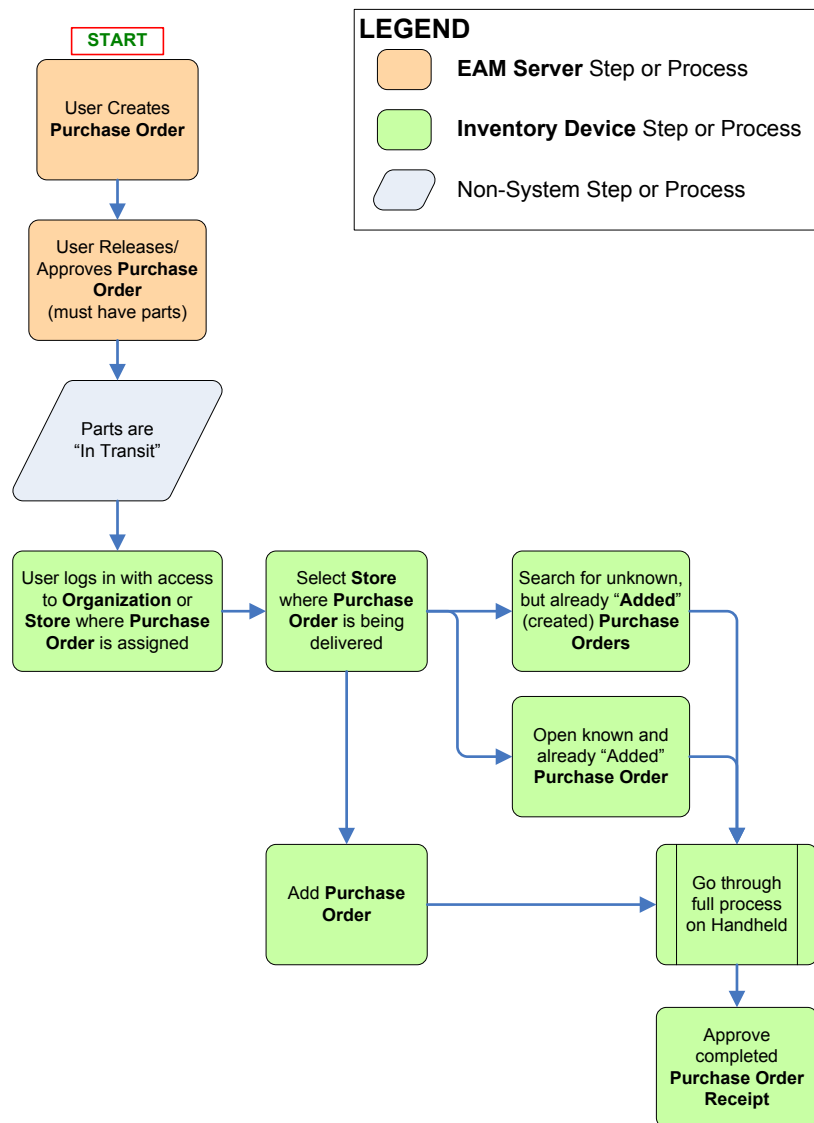


- ☞ Click **Login**
- ☞ You should be returned to the screen where you left off

1 - PO Receipt

☞ See **Inventory Main Screen** on page 12 for how to get to the Organizational Inventory Management screen

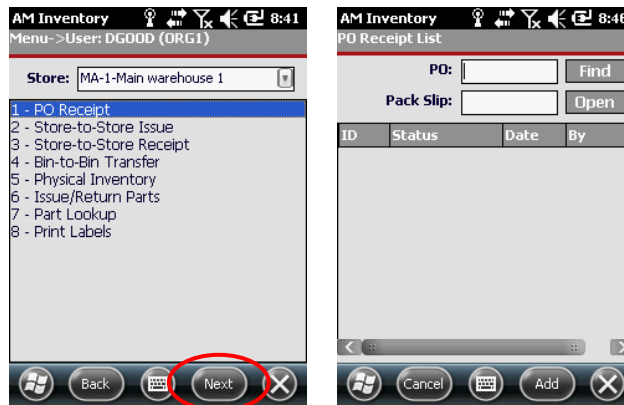
Overall Workflow from EAM Server to Device



1 – PO Receipt Workflow

Accessing 1 – PO Receipt Functionality

- Click the **1 - PO Receipt** option

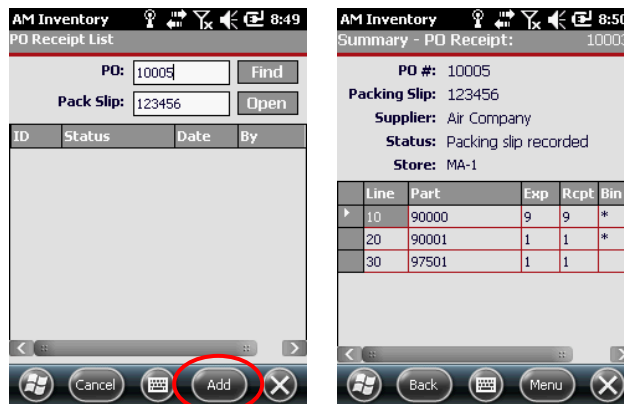


1 - PO Receipt List Screen

- Select **Next**
- Wait for the **PO Receipt List** screen to load

Adding New Receipts

- Enter the **PO** number you have and include a **Pack Slip ID** if there is one



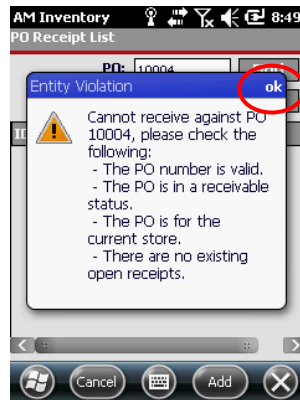
Add New Receipt to PO

- Click the **Add** button, and the application will display all parts included in the selected purchase order

NOTE: If there is already a packing slip, you cannot create a new one

Entity Violation Warning

☞ If you attempt to **Add** a **PO** that has already been added on the device, you will get an **Entity Violation Warning**

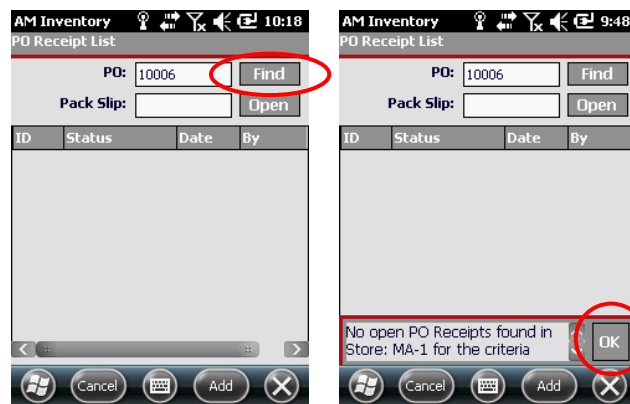


New PO Entity Violation

☞ Click **OK** and check your purchase order number

Searching for Purchase Orders

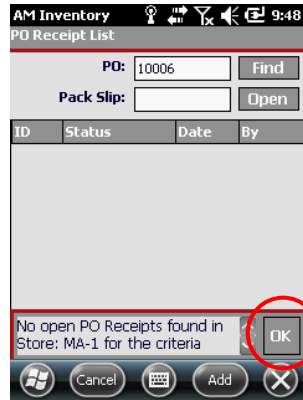
☞ Enter the **PO#** into the **PO** field and click the **Find** button



Checking Pos for Existing Receipts

☞ If there are no existing receipts, you'll get the **No open PO Receipts...** warning

- ☞ Wait for the warning message to disappear or click the **OK** button

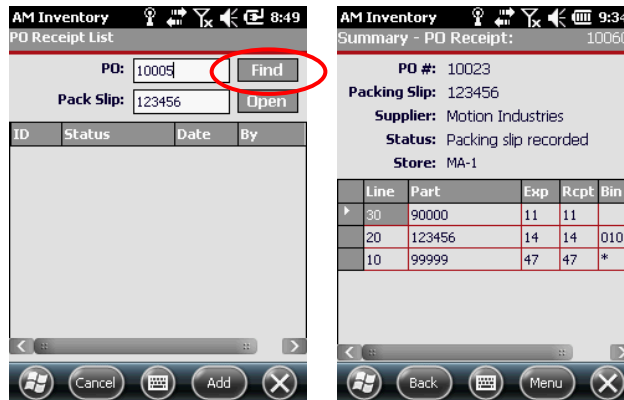


Checking Pos for Existing Receipts

- ☞ If there are receipts, see **Open Existing PO Receipts** on page 18 (below)

Open Existing PO Receipts

- ☞ Enter a valid, already processed **PO Number** into the **PO** field and/or a valid **Pack Slip ID** in the **Pack Slip** field if one exists



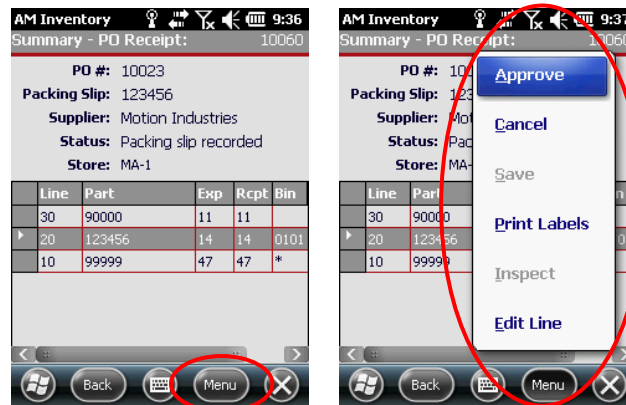
PO Receipt List Screen

- ☞ Click the **Find** button to display all items under that **PO**

NOTE: *If there is already a packing slip, you will not be able to create a new one, you will have to open the existing one and work with it.*

Main Menu Options - PO Receipt

Once you create a new receipt or open an existing one, the **PO Receipt Main Menu** has six options that may be accessible during the PO receiving process.



PO Receipt Main Menu

- **Approve** – Approves a purchase order once all line items have been received
- **Cancel** – Cancel all current edits to the **PO** and loose any changes
- **Save** – Save all existing changes to the **PO** without approving it
- **Print Labels** – Print labels for the existing line items included in the **PO**
- **Inspect** – Some parts are set up in the **EAM Server** to require an inspect prior to receiving them, and this function allows for the inspection process
- **Edit Line** – Allows editing (receiving) of the parts within a specific line item on a **PO**

Approve

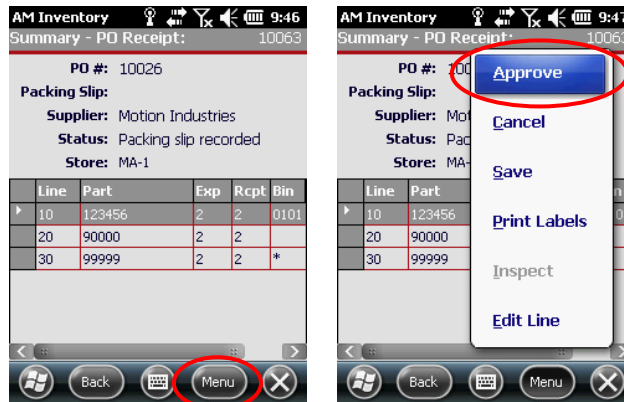
☞ Navigate to the Parts List of the desired PO

NOTE: See 1 - **PO Receipt** on page 15 for how to reach this UI

☞ Receive all parts for the **PO**

NOTE: See *Edit Line (Receive Parts)* on page 28 for how to complete PO Receipts

☞ Click the **Menu** button



PO Receipt Approval Option

☞ From the main menu, select **Approve**

NOTE: You must receive parts (and inspect wherever applicable) before approving a PO Receipt

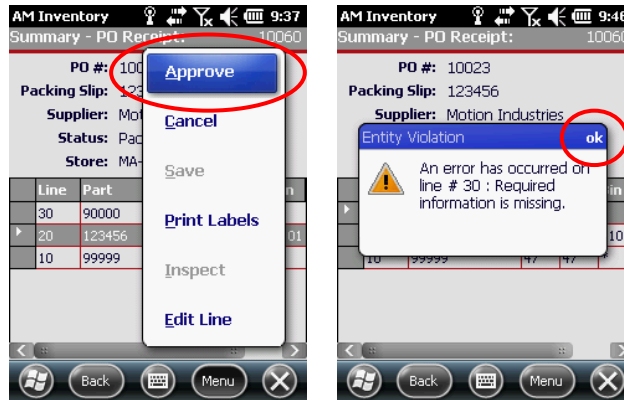
☞ Upon a successful **Approval**, the application returns back to the main UI



Returned to Main UI

Approval Entity Violation

- Selecting **Approve** before receiving (and inspecting where applicable) all parts will prompt an **Entity Violation**



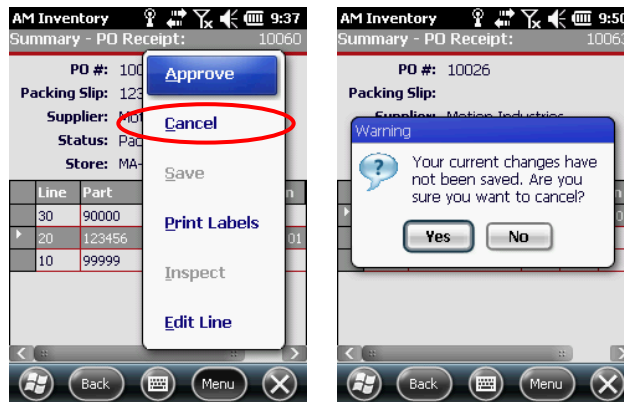
PO Approval Entity Violation

- Click **OK** and ensure that all parts have been received

Cancel

Cancels all changes made to the **PO Receipt** during that session.

- You can select **Cancel** at any point during processing

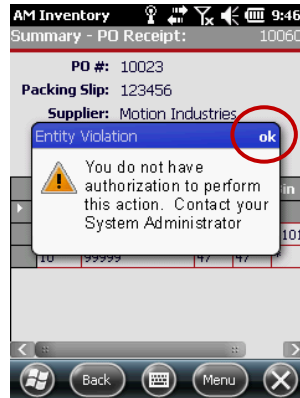


PO Receipt Cancel Confirmation

- At the confirmation prompt, select **Yes** and lose some or all of your changes

NOTE: In some cases cancellation of changes won't be possible and if all parts are listed as received, **Cancel** will still close out the PO

- ☞ If you receive the **Entity Violation** warning, some or all changes may be lost



Entity Violation Warning

- ☞ Click **OK** and proceed accordingly

Save

Save progress when you intend to go back and finish completing the existing **PO Receipt** without creating a new **PO Receipt** for the purchase order.

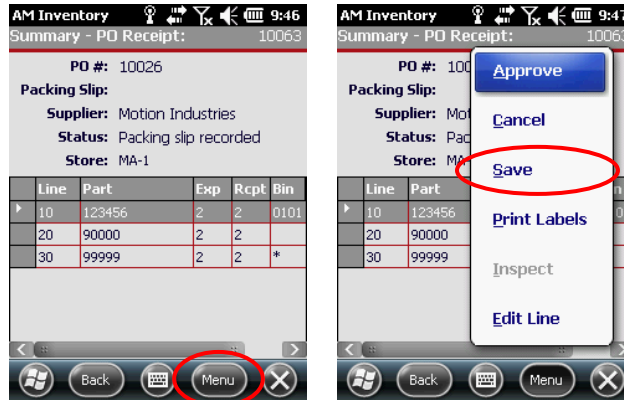
- ☞ Navigate to the **Parts List** of the desired **PO**

NOTE: See **1 - PO Receipt** on page 15 for how to reach this UI

- ☞ Receive all parts for the PO

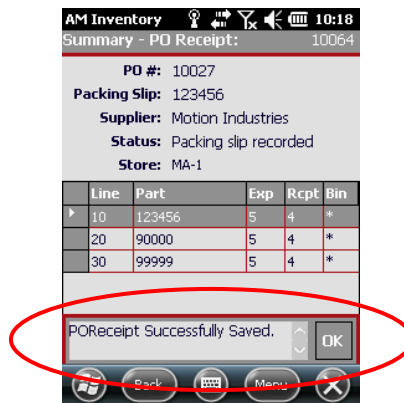
NOTE: See **Edit Line (Receive Parts)** on page 28 for how to complete PO Receipts

☞ Click Menu



PO Receipt Save Option

- ☞ From the main menu, select **Save**
- ☞ Wait for the screen to display the **POReceipt Successfully Saved** notification



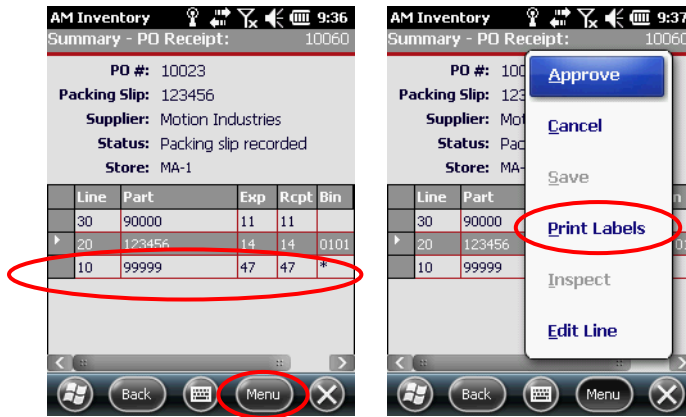
PO Receipt Successfully Saved Notification

- ☞ This notification will disappear automatically, or you can click the **OK** button

Print Labels

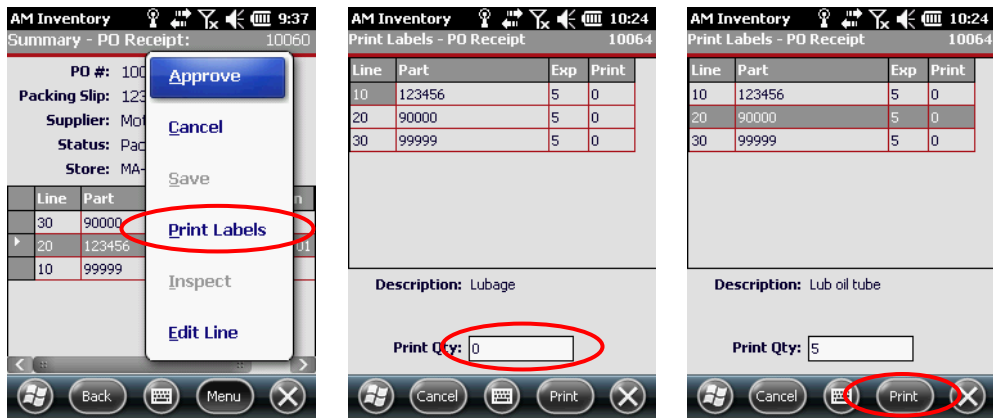
Print labels for the products that have been received into a specific bin.

Select the part for which you want to print one or more labels



Print Labels Screens

Select **Print Labels** from the menu



Print Labels Screens

Specify the **Print Qty**

Click **Print**

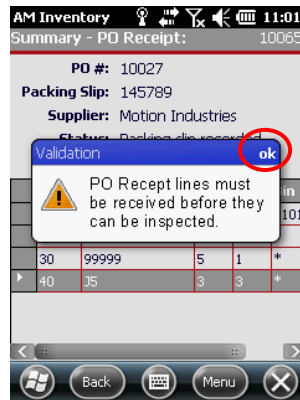
NOTE: In the event of printing issues, contact your System Administrator

Inspect

Receipt Validation Warning

Some inventory items (but not all) must be received before inspecting them.

☞ If you see the a **Validation** warning, click **OK** and receive the inventory first

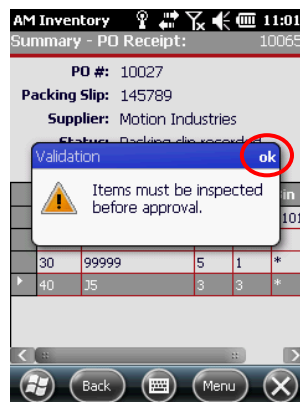


Must Be Received Validation Warning

Approval Validation Warning

Some inventory items (but not all) must be approved before inspecting them.

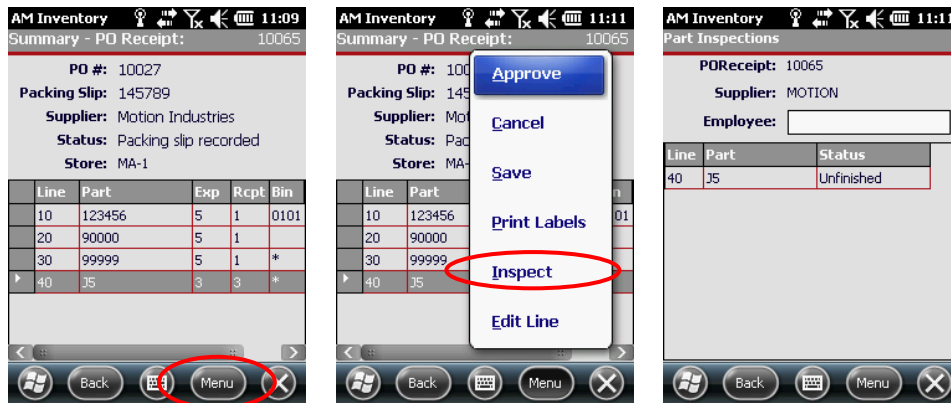
☞ If you see the a **Validation** warning, click **OK** and receive all of the inventory first



Must Be Received Validation Warning

Inspection

Select the Line Item you need to inspect

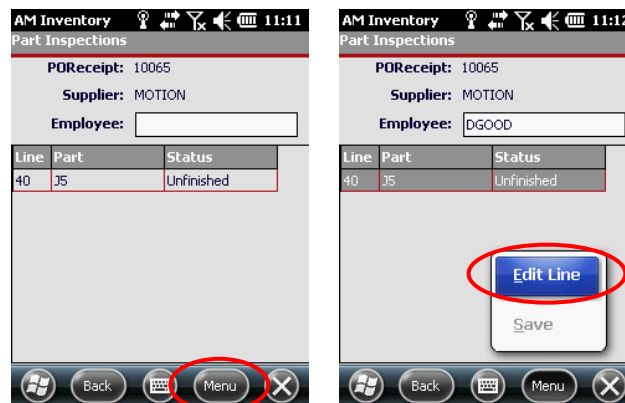


Inspection Screen

Click the **Menu** button and select **Inspect**

NOTE: Not all line items can be inspected. Also, clicking **Menu > Inspect** will take you to the same screen that includes all items to be inspected.

Enter your **Employee** name and **select** the line item you are inspecting

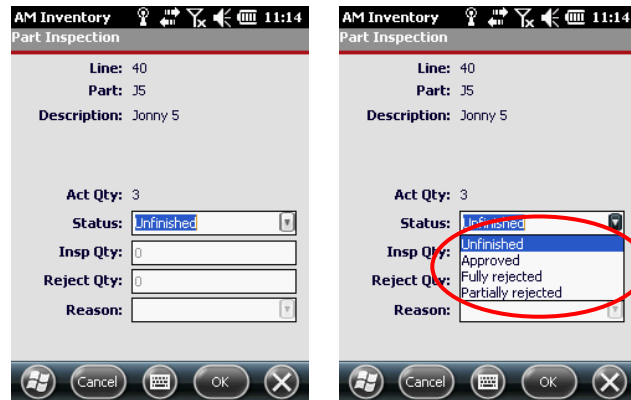


Inspecting Inventory

Click the **Menu** button

Select **Edit Line**

☞ Select the proper status for that part from the **Status** dropdown menu



Inspection Dropdown Options

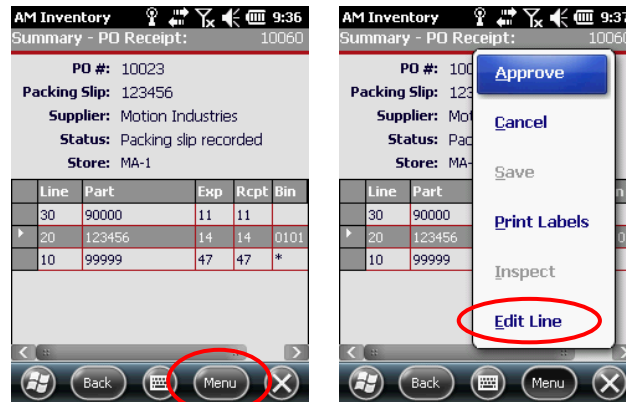
- **Unfinished** – Not all parts have been inspected, and the remaining number will need to be inspected before the PO can be approved in full
 - Select **Unfinished**
 - Click **OK**
- **Approved** – All parts have been inspected and are approved for being placed in inventory
 - Select **Approved**
 - Specify the **Insp Qty**
 - Click **OK**
- **Fully rejected** – All of the parts in the line item are rejected
 - Select **Fully rejected**
 - Specify the **Insp Qty**
 - Specify the **Reason**
 - Click **OK**
- **Partially rejected** – Some of the parts in the selected line item are rejected while some are accepted
 - Select **Partially rejected**
 - Specify the **Insp Qty**

- Specify the **Reject Qty**
- Specify the **Reason**
- Click **OK**

NOTE: Some parts will not have the *partially rejected* option, because there is only one part to inspect

Edit Line (Receive Parts)

☞ Select the line item you wish to receive



PO Receipt Main Menu

☞ Click **Menu** and select **Edit Line**

- ☞ Scan the **Product Bar Code** or enter the **Product ID** into the **Scan Part** field (*REQUIRED*)
- ☞ Specify the **Bin** (*REQUIRED*)

AM Inventory 10:16
PO Receipt: 10064 Line: 10
Desc: Lubage
Part: 123456
Bin: *,0101
Exp Qty: 5 Store Qty: 10307
Scan Part: 123456
Scan Bin: *
Receipt Qty: 4
Asset Id:
Serial #:
Take Photo
Cancel Ok

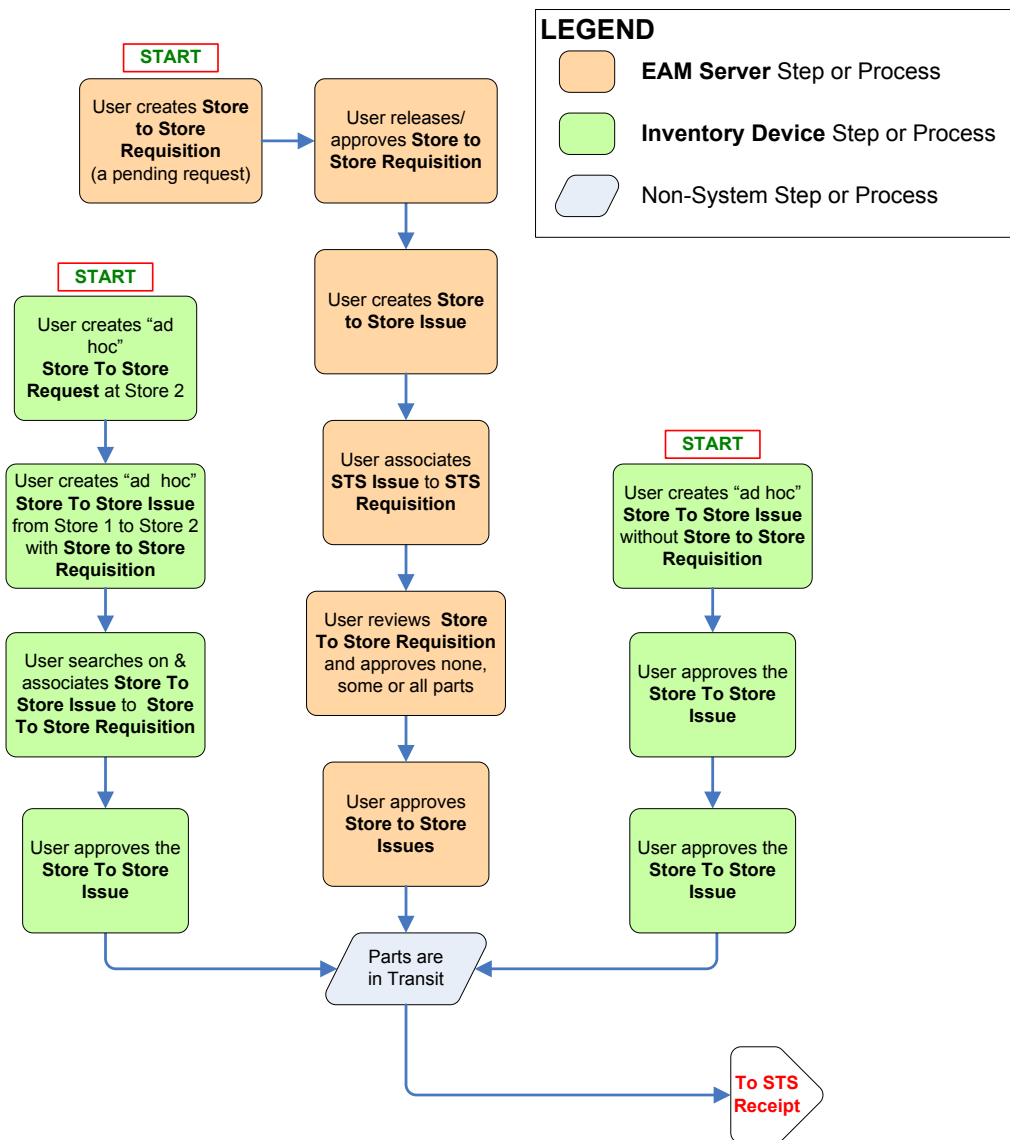
Edit Line Screen

- ☞ Enter the **Receipt Qty** (*REQUIRED*) and click the **OK** button
- ☞ The screen will return to the parts list, so repeat this process for each line item in the **PO**
- ☞ When all line items are updated, see **Approve** on page 19

2- Store-to-Store Issue

☞ See **Inventory Main Screen** on page 12 for how to get to the **Organizational Inventory Management** screen

Overall Workflow from EAM Server to Device



2 – Store to Store Issue Workflow

Accessing 2 – Store to Store Issue

- ☞ From the Main Menu select **2 – Store-to-Store Issue** and click **Next**

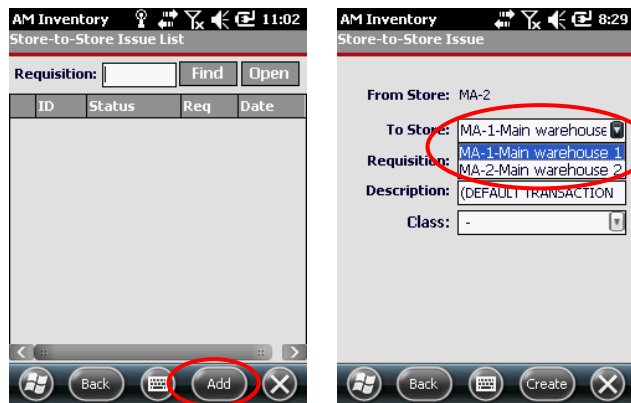


Store-to-Store Issue Main Screen

Adding New Store-to-Store Issues

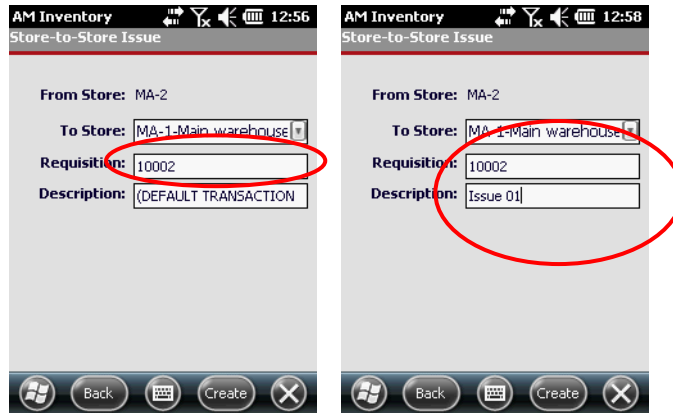
With an Existing Requisition Number

- ☞ Access the **2 – Store-to-Store Issue** as detailed above
- ☞ Click the **Add** button and select a location from the **To Store** dropdown



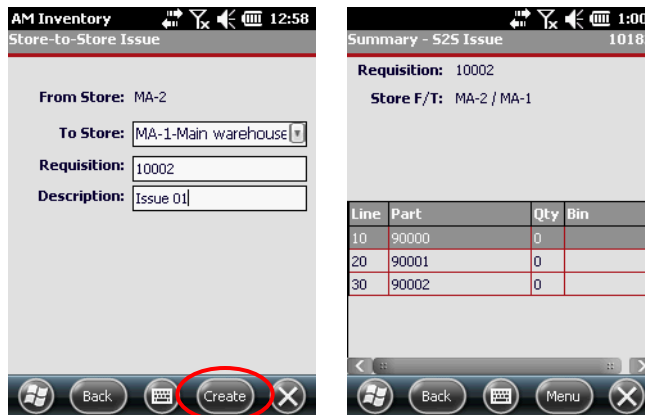
Selecting the Store for a Transfer

- Enter the existing **Requisition** number in the **Requisition** field and update the **Description** field as needed



Creating a Store To Store Transfer

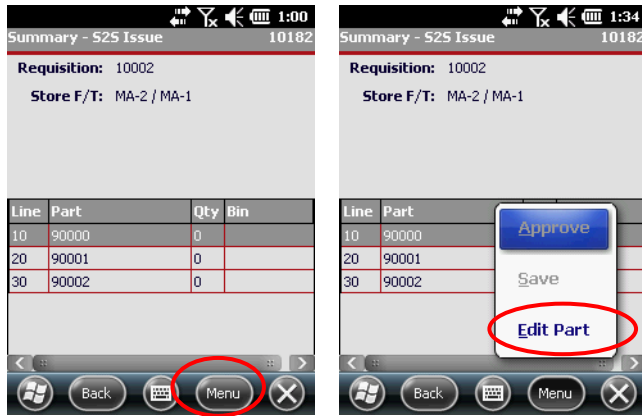
- Input an appropriate **Description**
- Click **Create**



Creating a Store To Store Transfer

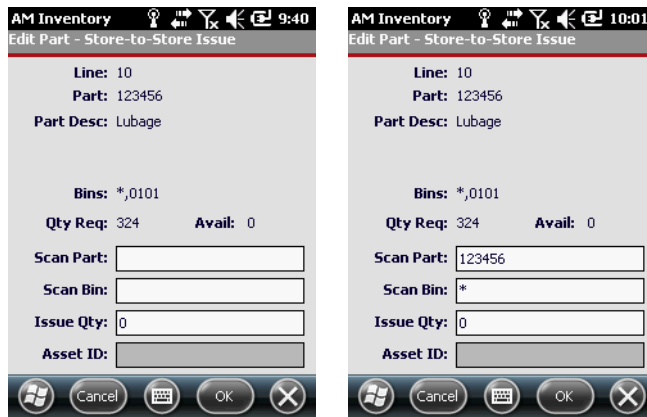
- The system will create the new requisition and display the parts' status

- Enter the recipient's name in the **Issue To ID** field and select the line you wish to issue



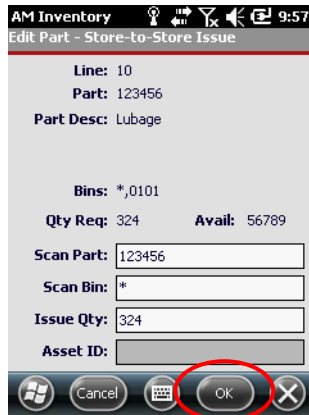
Editing Store To Store Parts

- Click the **Menu** button and select **Edit Part**
- Scan or enter the part number into the **Scan Part** field



Store to Store Issue Part Definition

- ☞ Scan or enter the **Bin** number into the **Scan Bin** field
- ☞ When you click on the **Issue Qty** field, the **Avail** and **Bin** number should update with the actual quantity of parts available



Submitting the Quantity

- ☞ Enter the **Issue Qty**, and click **OK**

NOTE: The system may indicate that an **Asset ID** is required. If so, provide one and resubmit

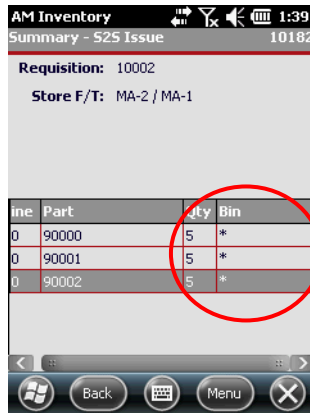
- ☞ Once the part is issued, click the **Menu** button and select **Edit Part**



Store to Store Issue Part Definition

NOTE: The **Approve** option will be available once one of the line items has been edited and saved. This allows the user to save partial receipts or receipts that will have multiple deliveries.

☞ Repeat the **Edit Part** process for each line-item that will be placed in transit

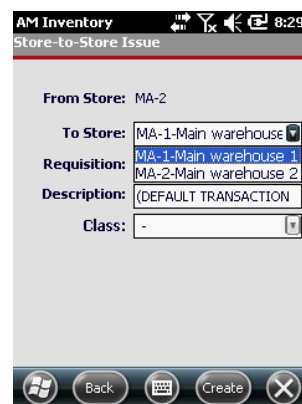
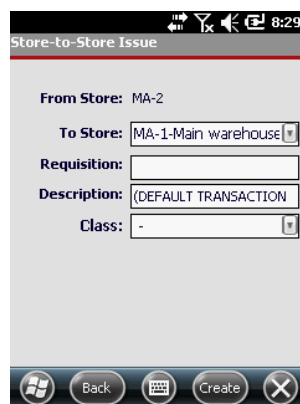


Quantity of Parts Displayed

☞ Some or all **Line Items** will have updated quantities and bins

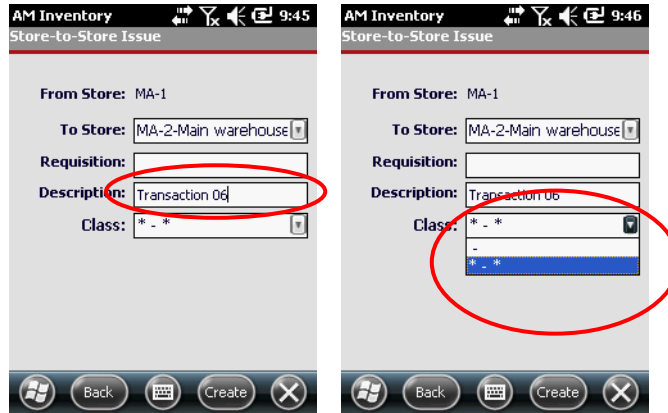
Without an Existing Requisition Number

☞ Click the **Add** button and select a location from the **To Store** dropdown



Selecting the Store

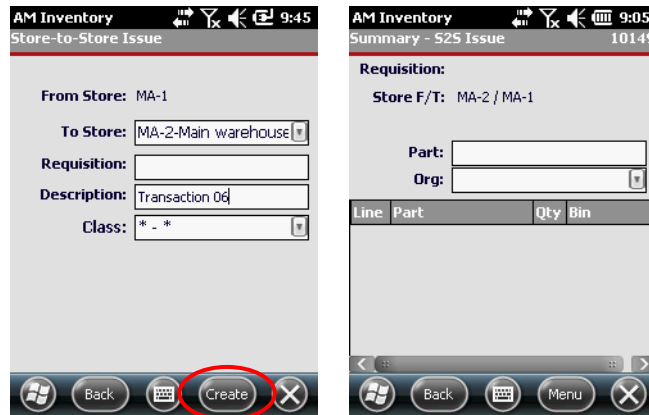
☞ Update the **Description** field as needed



Adding Description & Class

☞ Select the appropriate **Class** from the dropdown

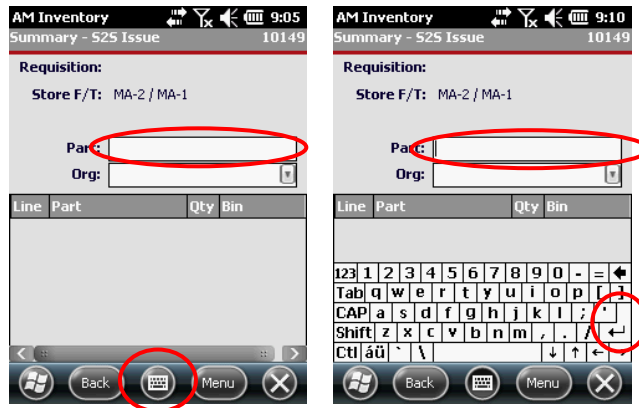
☞ Click **Create**



Creating a Store To Store Transfer

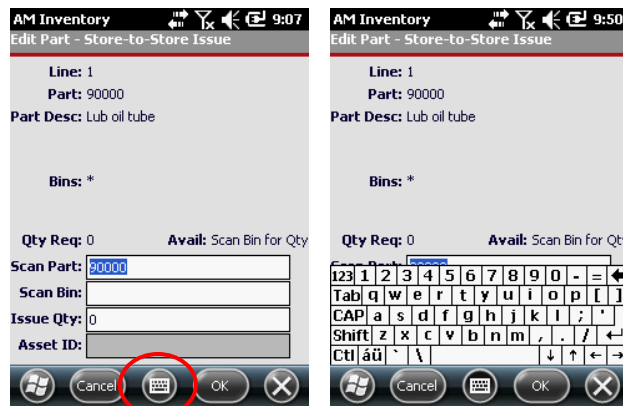
☞ The system will create the new requisition and display the part entry screen

☞ To manually enter the part number, click in the **Scan Part Field**



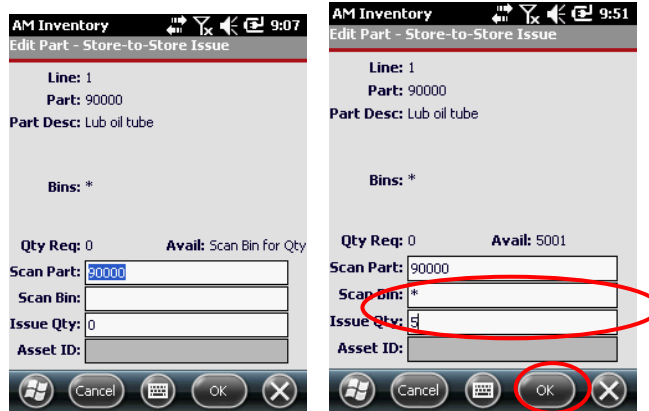
Manually Enter Part

- ☞ Click the keyboard button, enter the part number and press the **Enter** button or click on another field
- ☞ The system will automatically go to the **Edit Part** screen
- ☞ Click the keyboard button again to remove the keyboard



Using the UI Keyboard

- ☞ Scan or enter the **Bin** number into the **Scan Bin** field

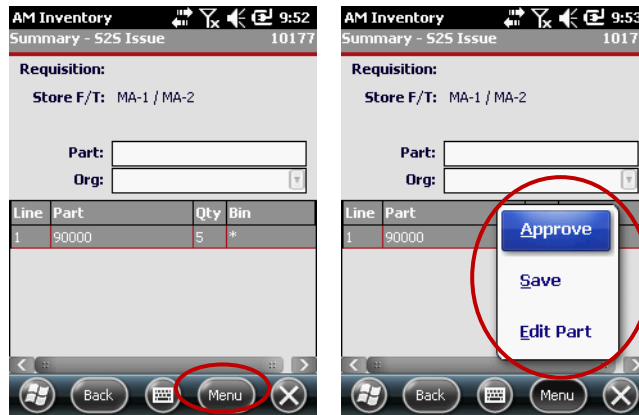


Entering the Part

- ☞ Enter the **Issue Qty**, enter the **Asset ID** if it is applicable and click **OK**

NOTE: The system may indicate that an **Asset ID** is required. If so, provide one and resubmit

- ☞ Once back at the **Summary** screen, either enter another part or click on the **Menu** button



Store to Store Issue Summary Screen Main Menu

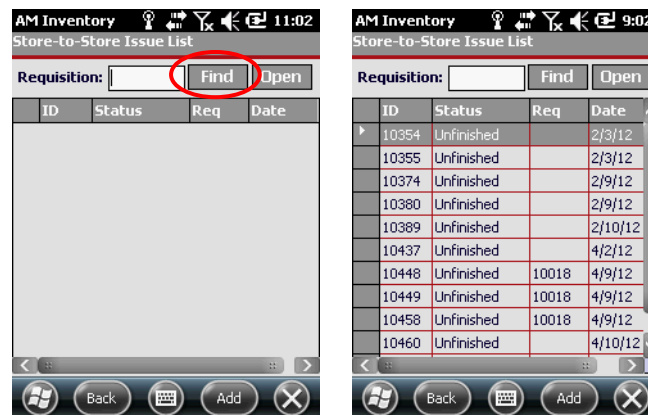
- ☞ Select one of the three available options

- **Approve** – Approves the **Store-to-Store Issue** and then returns you to the **Requisition Summary** screen where you can search for other requisitions to be processed
- **Save** – Saves all changes made to the requisition and allows you to approve the requisition and move on
- **Edit Part** – Takes you to the **Part Definition** screen where you can change the part data and re-save

NOTE: Depending on where you are in the process, one or more of these options may be disabled

Working With Existing Store-to-Store Issue Requisitions

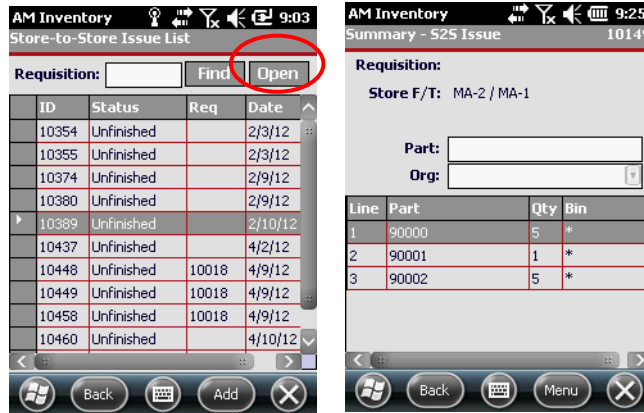
- ☞ Enter your **Requisition Number** in the Requisition field or leave it blank



Finding Existing Store-to-Store Issues

- ☞ Click the **Find** button to see all requisitions that match your search criteria

- Click on the desired **Requisition** and click the **Open** button



Select a Store to Store Issue

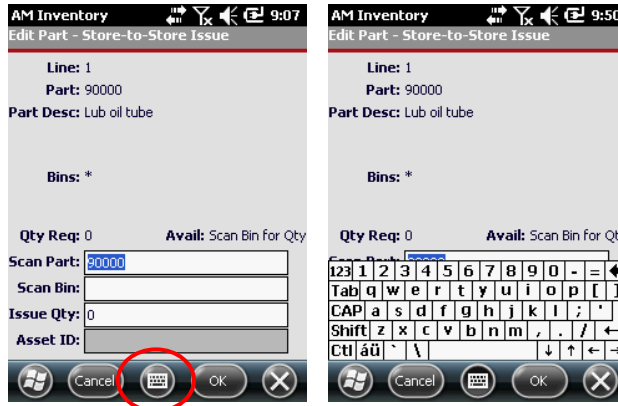
- Scan the Part # or click the keyboard button, to expose the keyboard and enter it manually



Select a Store to Store Issue

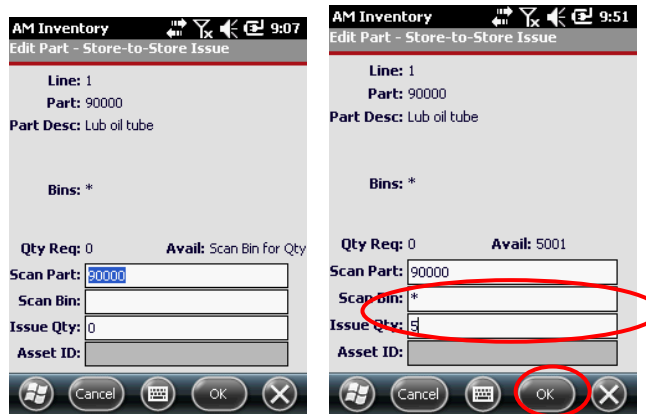
- Click away from the part number or click the Enter button on the keypad
- The system will automatically go to the **Edit Part** screen

☞ Click the keyboard button again to remove the keyboard



Using the UI Keyboard

☞ Scan or enter the **Bin** number into the **Scan Bin** field

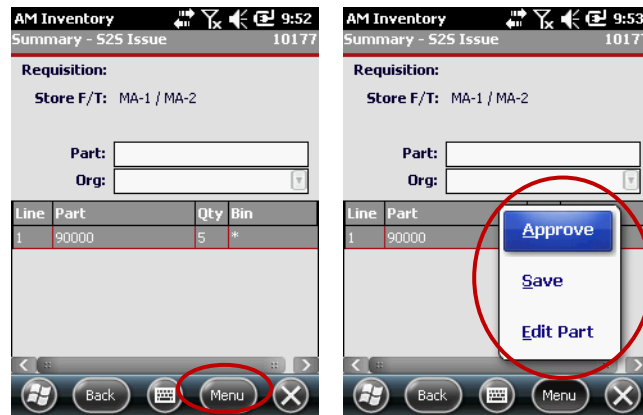


Entering the Part

☞ Enter the **Issue Qty**, enter the **Asset ID** if it is applicable and click **OK**

NOTE: The system may indicate that an **Asset ID** is required. If so, provide one and resubmit

- Once back at the **Summary** screen, either enter another part or click on the **Menu** button

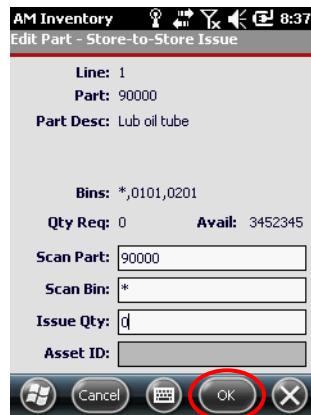


Store to Store Issue Summary Screen Main Menu

- Select one of the three available options
 - Approve** – Approves the **Store-to-Store Issue** and then returns you to the **Requisition Summary** screen where you can search for other requisitions to be processed
 - Save** – Saves all changes made to the requisition and allows you to approve the requisition and move on
 - Edit Part** – Takes you to the **Part Definition** screen where you can change the part data and re-save

NOTE: Depending on where you are in the process, one or more of these options may be disabled

- ☞ Scan or enter or update the **Bin** number into the **Scan Bin** field and enter or update the **Issue Qty**,

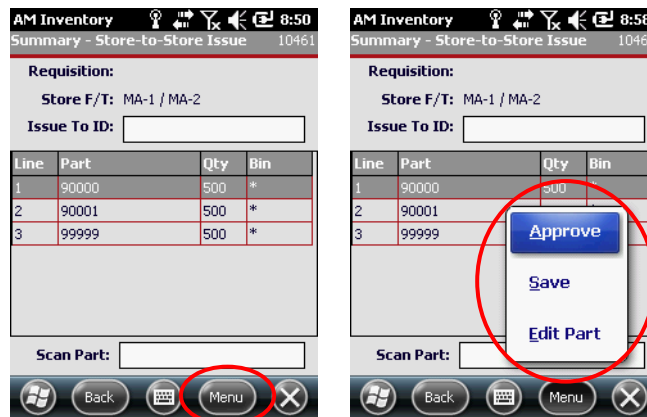


Store to Store Issue Part Definition

- ☞ Enter the **Asset ID** if applicable and click **OK**

NOTE: The system may indicate that an **Asset ID** is required. If so, provide one and resubmit

- ☞ Once back at the **Summary** screen, either enter another part or click on the **Menu** button



Store to Store Issue Summary Screen Main Menu

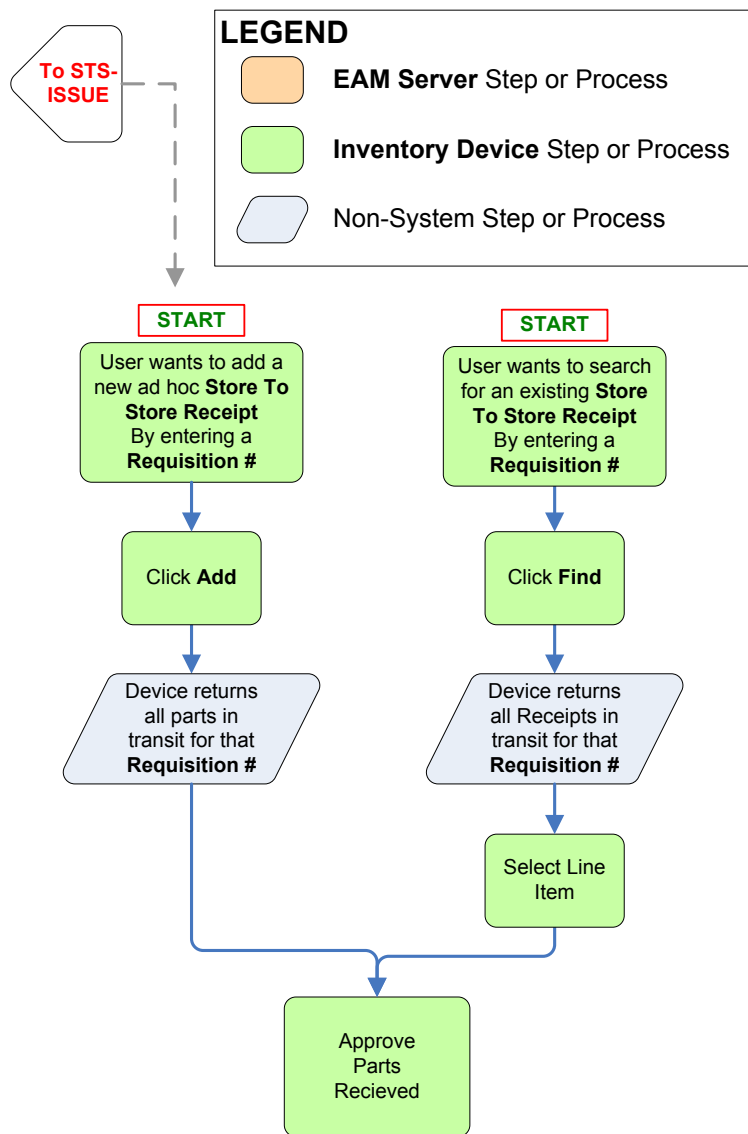
- ☞ Select one of the three available options

- **Approve** – Approves the **Store-to-Store** issue and then returns you to the **Requisition Summary** screen
- **Save** – Saves all changes made to the requisition and allows you to approve the requisition and move on
- **Edit Part** – Takes you to the Part Definition screen where you can change the part data and re-save

3 - Store-to-Store Receipt

☞ See Inventory Main Screen on page 12 for how to get to the Organizational Inventory Management screen

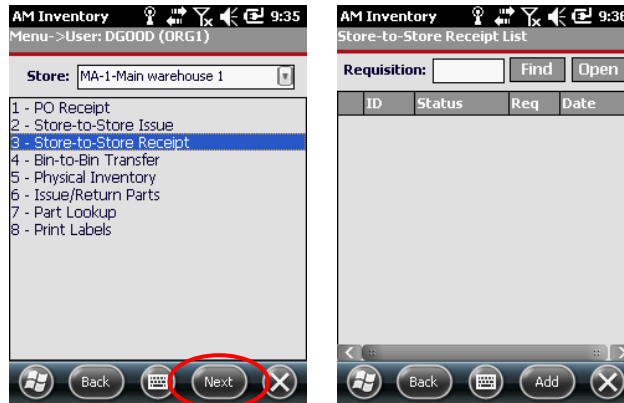
Overall Workflow from EAM Server to Device



3 – Store to Store Receipt Workflow

Accessing 3 – Store to Store Receipt

- Select **3-Store-to-Store Receipt** and click Next

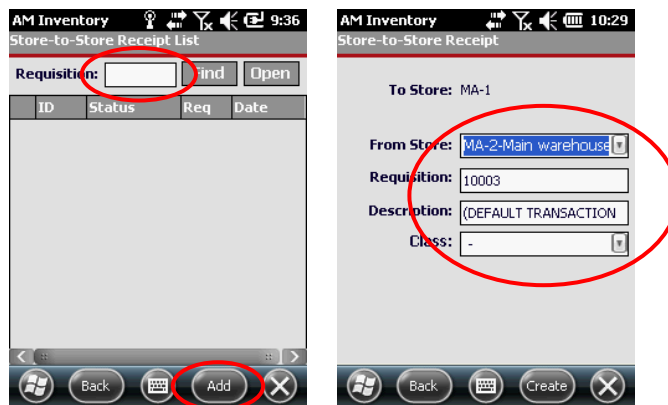


Store-to-Store Receipt

Adding New Store-to-Store Receipts

Inputting a Known Requisition Number

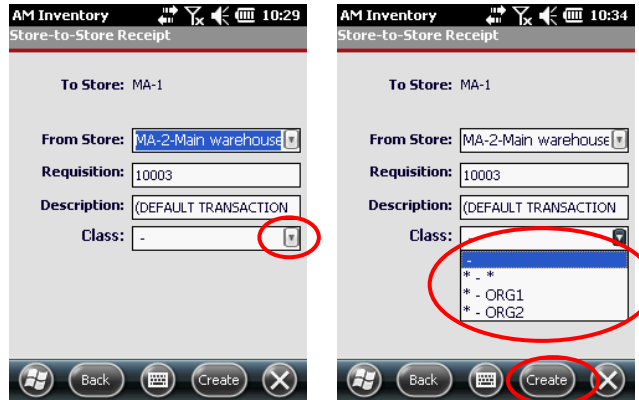
- Enter the Requisition number



Adding New Store-to-Store Issues

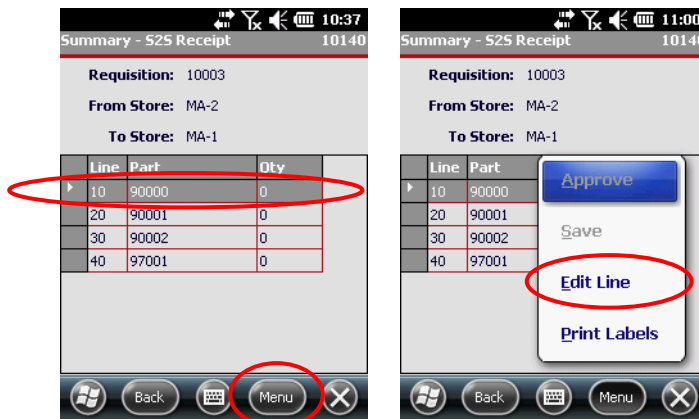
- The system will resolve to the Store-to-Store Receipt screen, and the **To Store**, **From Store**, and **Requisition** fields will already be selected

- Select the appropriate Class value from the dropdown menu



Adding New Store-to-Store Issues

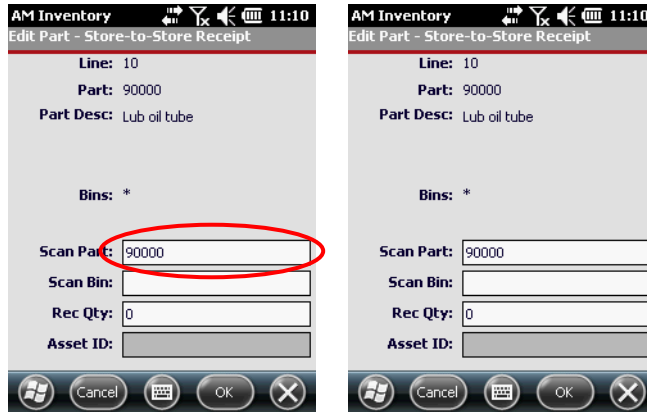
- Click the **Create** button
- When the system resolves to the **Requisition** screen, select the line item you wish to receive and click the **Menu** button



Populated Store-to-Store Issue Screen

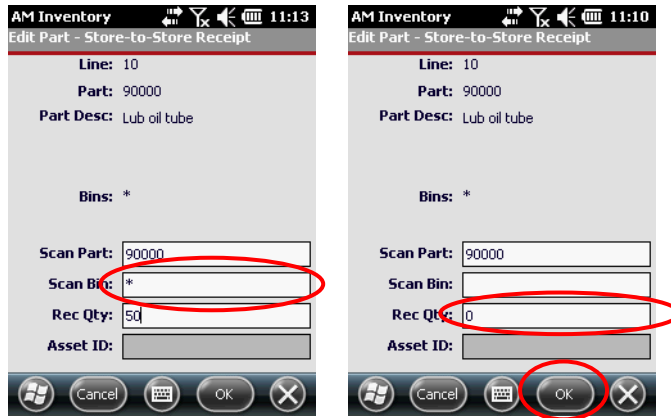
- Select **Edit Line**

☞ Scan or enter the **Part** number in the **Scan Part** field



Receiving Part & Bin Numbers

☞ Scan or enter the **Bin** number in the **Scan Bin** field



Receiving Part & Bin Numbers

☞ Enter the quantity being received and click the **OK** button

Finding Existing Store-to-Store Receipts

- ☞ Leave the **Requisition Number** field blank or enter a known number and click the **Find** button to see all existing requisitions

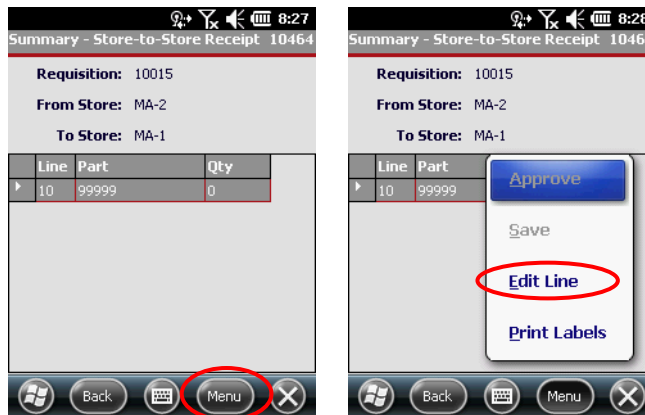


Finding Existing Store-to-Store Receipts

- ☞ Select the desired **Requisition** and click the **Open** button

Receiving Parts

- ☞ Select the **Part(s)** you wish to receive

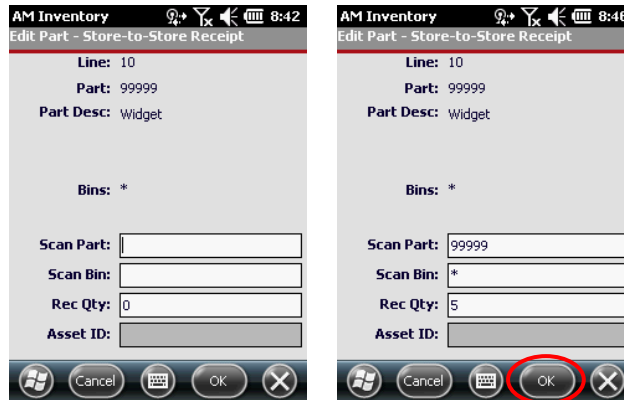


Scan / Enter Store to Store Part

- ☞ Click the main **Menu** button and select **Edit Line**

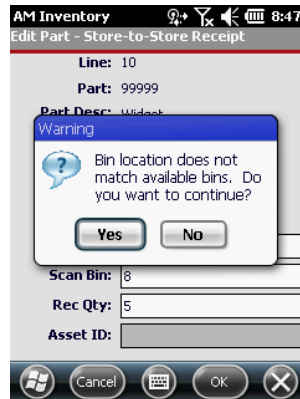
NOTE: You can see a description of all **Store-to-Store Receipt Main Menu** options on page 51

- ☞ The **Scan Part**, **Scan Bin** and **Rec Qty** text fields should already be populated for you
- ☞ Scan or enter the data into the **Scan Part**, **Scan Bin** and **Rec Qty** text boxes



Existing Requisition Part

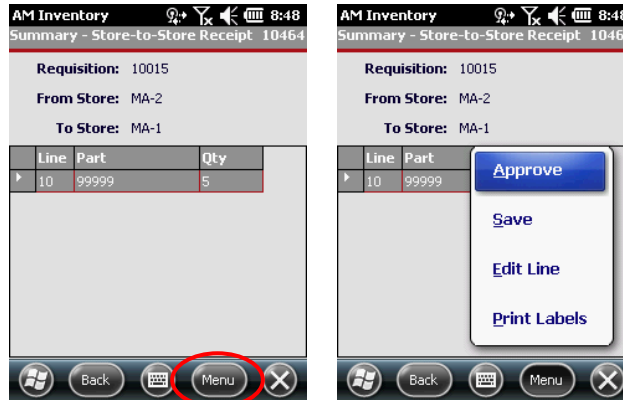
- ☞ Click **OK**
- ☞ If you see the **Bin Warning**, check the bin number and either click **Yes** to accept the number or click **No** to correct it



Store-to-Store Receipt Bin Warning

NOTE: If “Yes,” notify your System Admin that you would like to add the Bin to the EAM Server

☞ Once at the **Summary** screen, enter another part or click the **Menu** button



Store to Store Issue Summary Screen Main Menu

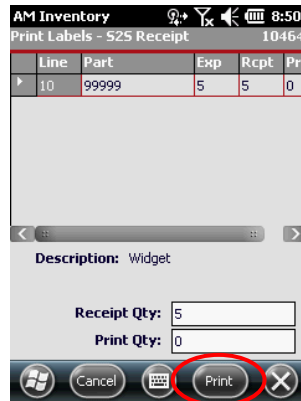
☞ Select one of the four available **Store-to-Store Receipt Main Menu** options

- **Approve** – Approves the Store to Store issue and then returns you to the Requisition Summary screen
- **Save** – Saves all changes made to the requisition and allows you to approve the requisition and move on
- **Edit Line** – Takes you to the Part Definition screen where you can change part data and re-save
- **Print Labels** – Prints labels for the parts within a **Store-to-Store Receipt**



Store-to-Store Receipt Print Labels

- From the **Store-to-Store Receipt Print labels** main screen, select the part you want to print labels for



Store-to-Store Print Labels Main Screen

- In the **Print Qty** field, enter the number of labels needed and click **Print**
- The screen should return you to the **Store-to-Store Receipt** parts summary page

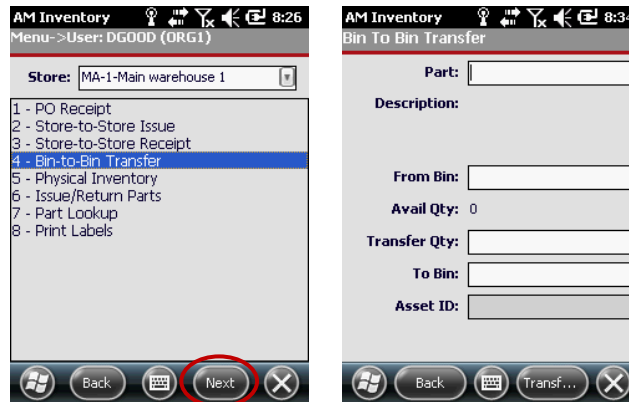
NOTE: Contact your System Administrator if you encounter any printing errors

4 - Bin-to-Bin Transfer

- ☞ See Inventory Main Screen on page 12 for how to get to the Organizational Inventory Management screen

Accessing 4 – Bin-to-Bin Transfer

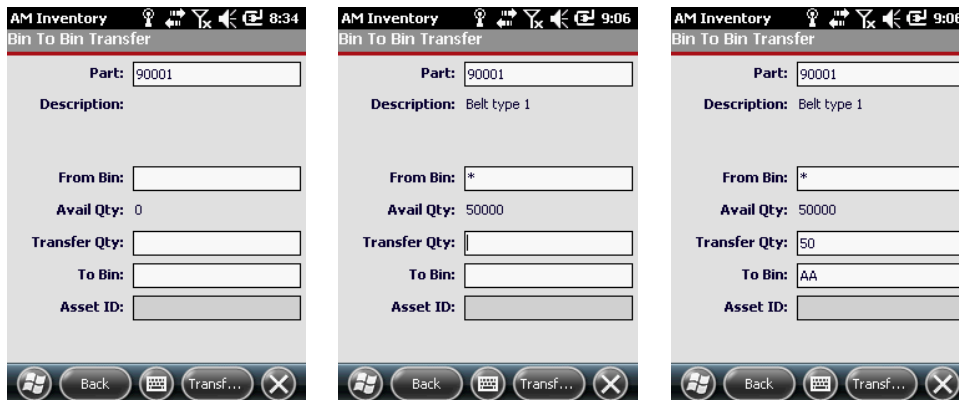
- ☞ Select **4 – Bin-to-Bin Transfer** and click the **Next** button



Bin-to-Bin Transfer

Transferring Parts

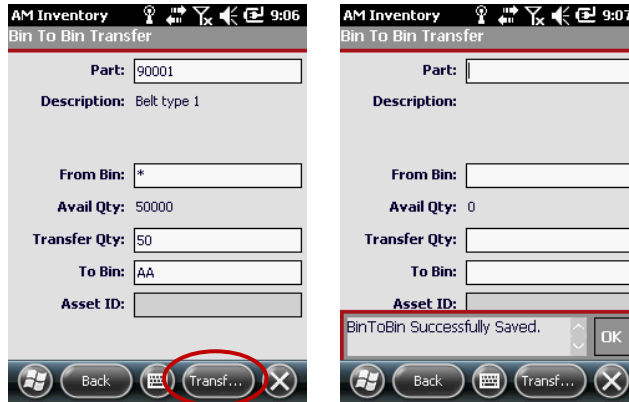
- ☞ Populate the **Part**, **From Bin**, **Transfer Qty** and **To Bin** fields



Populated Bin-to-Bin Screen

NOTE: Some values will auto-populate as you proceed through each field

☞ Click Transfer Part



Populated Bin to Bin Transfer Screen

☞ Either wait for **BinToBin Successfully Saved** to disappear or click **OK**

NOTE: You can either enter another part or click **Back** to go back to the **Inventory Main** page

5 - Physical Inventory

- ☞ See Inventory Main Screen on page 12 for how to get to the Organizational Inventory Management screen

Accessing 5 – Physical Inventory

- ☞ Be sure to select the proper **Store** then select **5 – Physical Inventory**

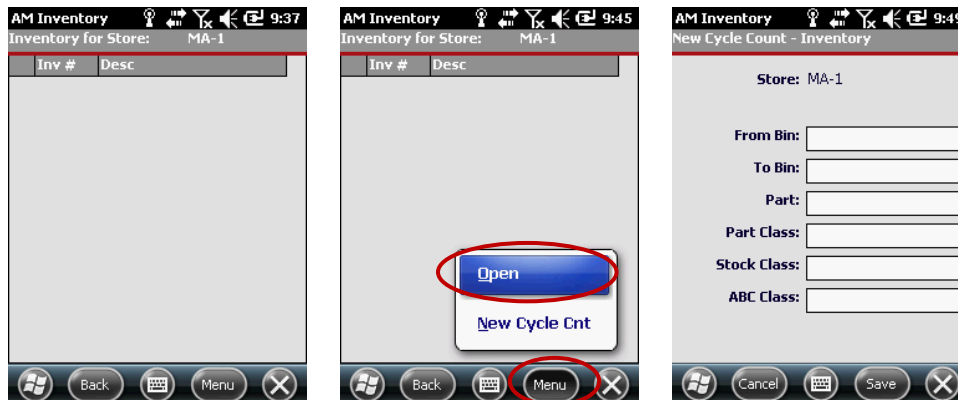


Physical Inventory

- ☞ Click **Next**
- ☞ If you see Inventory Counts, go to **Working with Existing Counts** on page 56

Creating New Cycle Counts

- ☞ If there are no counts, click the **Menu** button and select **Open**



Inventory Summary Main Menu

NOTE: The system will only allow you to create a new cycle count if there are no existing cycle counts listed

The image shows two side-by-side screenshots of a mobile application interface for 'AM Inventory'. Both screens display the 'New Cycle Count - Inventory' form. The form includes a 'Store' field set to 'MA-1' and several input fields: 'From Bin', 'To Bin', 'Part', 'Part Class', 'Stock Class', and 'ABC Class'. At the bottom of each screen are icons for 'Cancel', 'Save', and a close button. In the right-hand screenshot, a red circle is drawn around the 'From Bin' input field.

New Cycle Count Definition

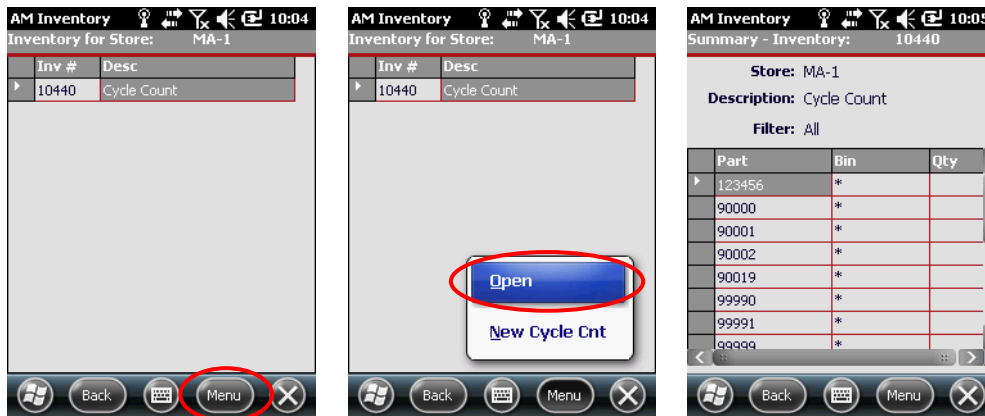
- ☞ Populate the appropriate fields and then click **Save**
 - **From Bin** – Which bin is the part coming from
 - **To Bin** – Which bin is the part going to
 - **Part** – The Part Number
 - **Part Class** – Defined in the EAM server to segregate parts into separate groups for ease of management
 - **Stock Class** – Defined in the EAM server to segregate parts into separate groups for ease of management
 - **ABC Class** – Defined in the EAM server to segregate parts into separate groups for ease of management

Working with Existing Counts

- ☞ See **Accessing 5 – Physical Inventory** on page 55 to see how to get here

Opening Physical Inventory Summary

Click the **Store List Main Menu** button

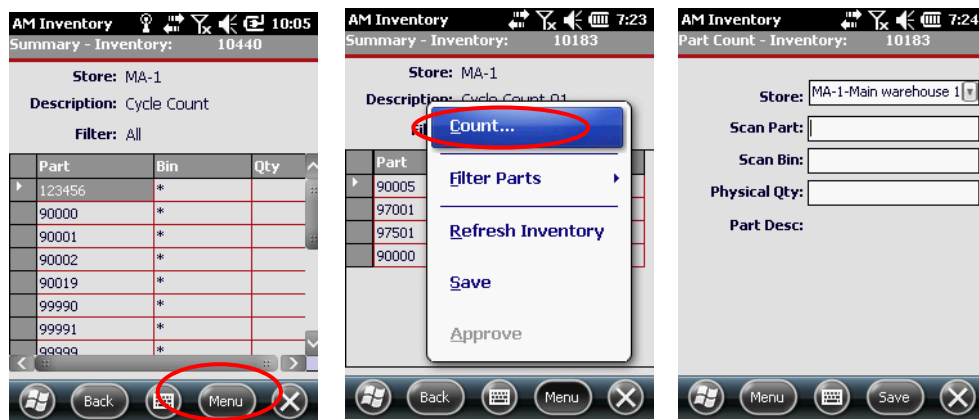


Inventory Summary Screen

Select **Open** and review the list on the **Inventory Summary Screen**

Part Count

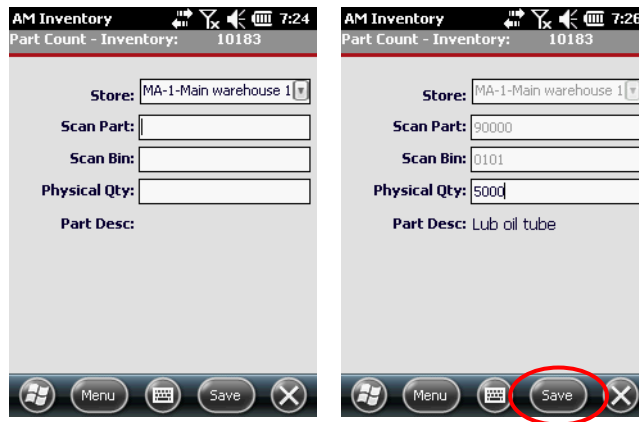
Click the **Main Menu** button from the **Inventory Summary Screen**



Inventory Summary Part Count

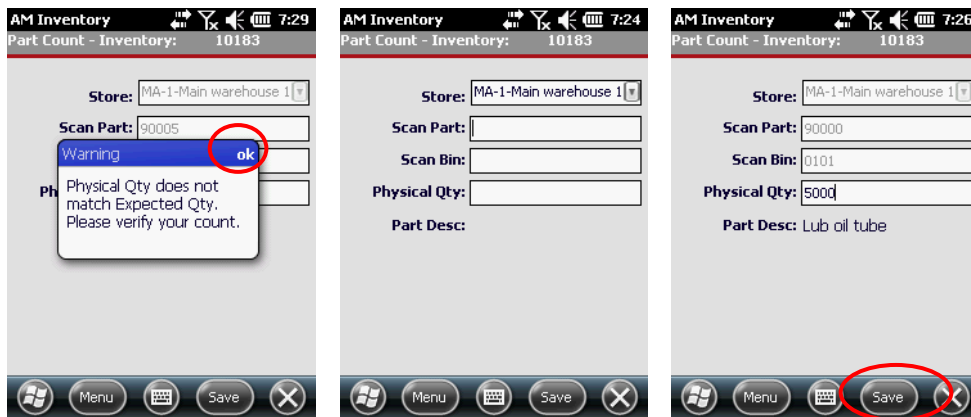
Select the desired part and select **Count...**

- ☞ Scan or enter the part number in the **Scan Part** field and scan or enter the bin number in the **Scan Bin** field



Inventory Summary Part Count

- ☞ Enter the **Physical Quantity** and click the **Save** button after each count
- ☞ Wait for the **Save Successful** confirmation
- ☞ Wait for the confirmation to disappear or click the **OK** button to remove it
- ☞ In the event that you get the **Physical Qty does not match...** warning, click the **ok** button



Physical Count Quantity Mismatch

- ☞ Double-check the expected quantity, re-enter it and click the **Save** button

NOTE: You can save without returning to the **Inventory Summary Screen**

☞ If you still get the warning, contact your System Administrator or Controller

Part Count Menu

NOTE: See **Opening Physical Inventory Summary** on page 57 on how to get to this point in the UI

☞ Click the **Part Count** main menu button to clear entries or when you are finished

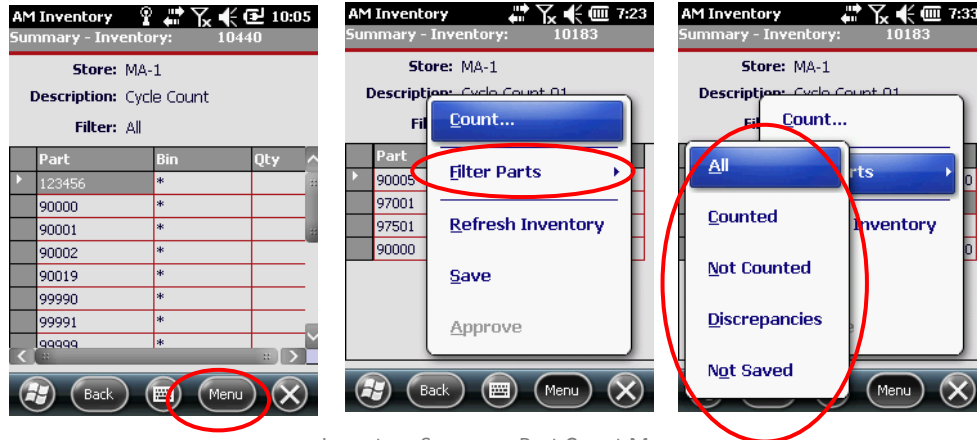


Inventory Part Count Menu

- **Clear** – Displays all parts included in the **Inventory Count**, regardless of their status
- **Back** – Displays only those parts in the **Inventory Count** that have already been counted

Filter Parts

☞ Click the **Main Menu** button from the **Inventory Summary Screen**



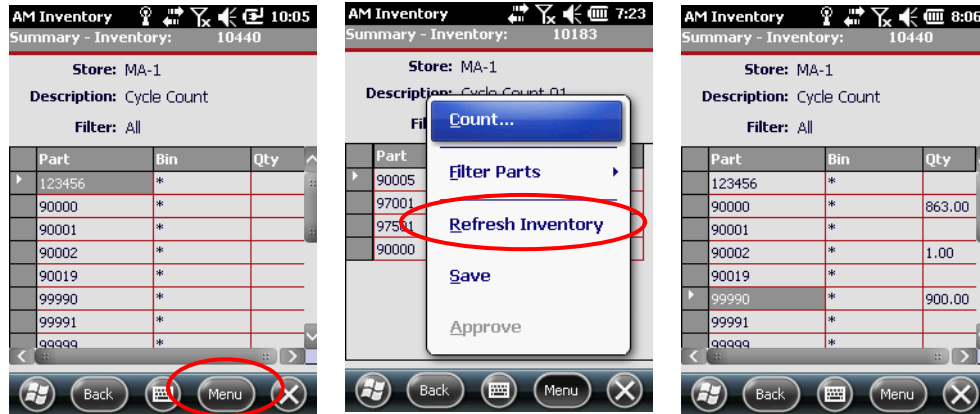
Inventory Summary Part Count Menu

- **All** – Displays all parts included in the **Inventory Count**, regardless of their status
- **Counted** – Displays only those parts in the **Inventory Count** that have already been counted
- **Not Counted** – Displays only those parts in the **Inventory Count** that have not been counted
- **Discrepancies** – Displays those parts where the **Inventory Count** has discrepancies or there are issues with the saved part
- **Not Saved** – Displays only those parts that have been counted but not saved back to the main server

Refresh Inventory

In environments where more than one person can be working on a **Summary Count**, it is best to refresh your view to see the latest information.

☞ Click **Menu** from the **Inventory Summary** screen

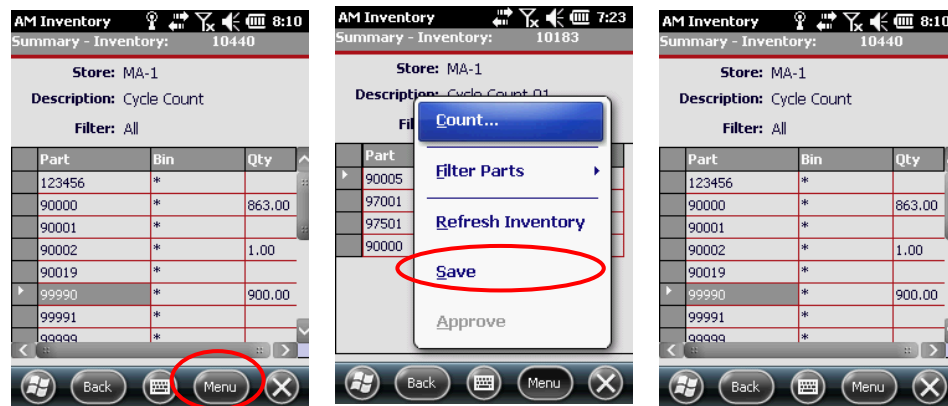


Inventory Summary Refresh Inventory

- ☞ Select **Refresh Inventory**
- ☞ Wait for the system to reload all counts for the selected list of parts

Save Inventory

- ☞ Click **Menu** from the Inventory Summary screen

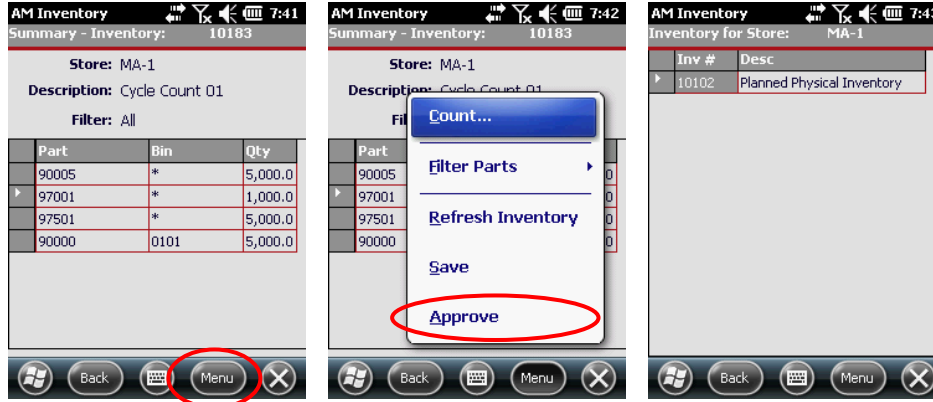


Inventory Summary Save Count

- ☞ Select **Save** and you will be returned to the **Inventory Summary Screen**

Approve Count

- ☞ When all parts have been counted, select the **Menu** button



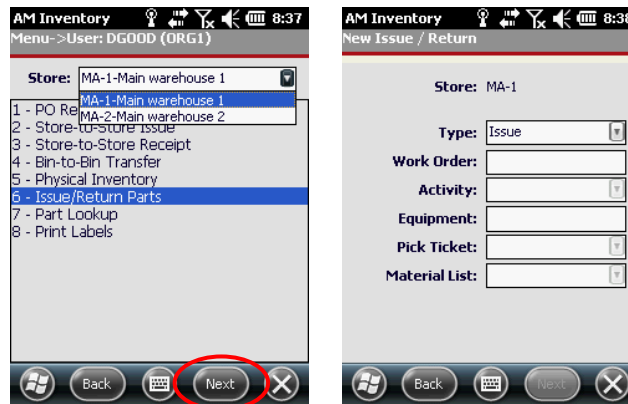
- ☞ Click the **Approve** option from the menu (it should now be an available option)
- ☞ The **Cycle Count** you were working on should no longer be in the list of **Counts**

6 - Issue/Return Parts

- ☞ See **Inventory Main Screen** on page 12 for how to get to the Organizational Inventory Management screen

Accessing 6 – Issue/Return Parts

- ☞ Select the **Store** from the **Store** dropdown and Select **6 – Issue/Return Parts**



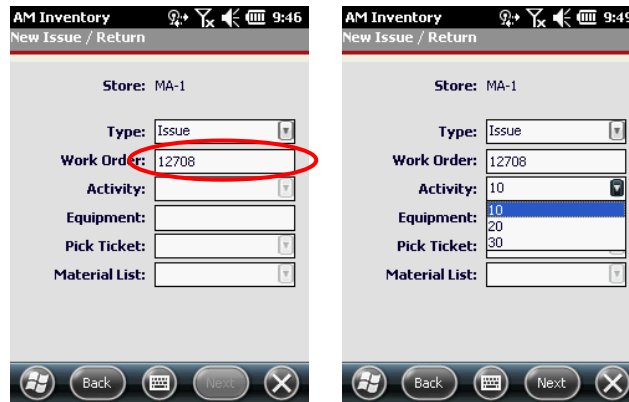
Issue/Return Parts

- ☞ Click **Next**

Issue Parts

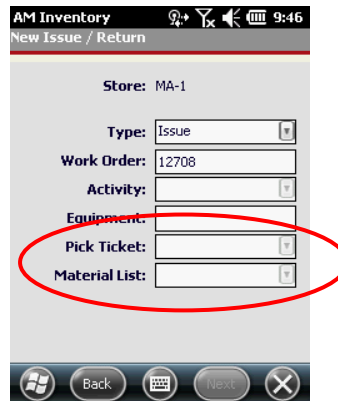
Issuing a New Part

- Enter the **Work Order** number and click on or tab to another field



Selecting Activities

- If there are multiple activities, select one from the **Activity** drop-down
- If available, select the appropriate **Pick Ticket** and **Material List** from their respective drop-downs



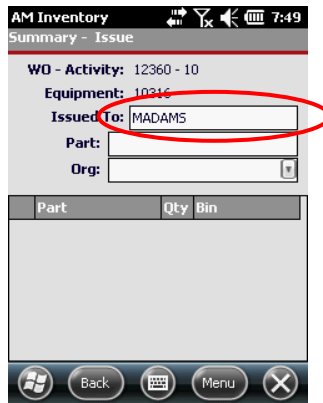
Selecting Pick Tickets & Material Lists

- Click **Next** once all fields have valid entries to get to the **Parts Summary** screen



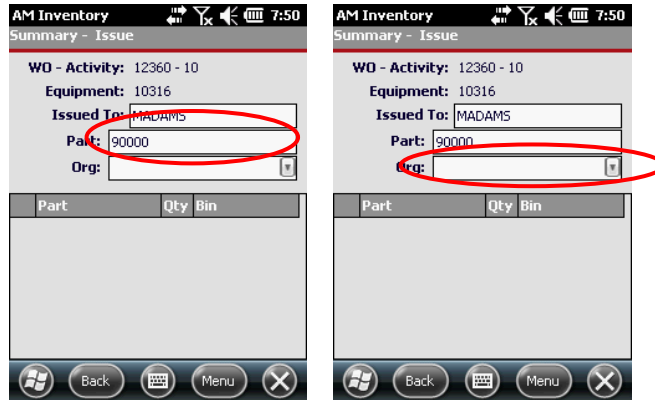
Issue Part Summary

- Enter the **USER** that the part or parts are being **Issued To**



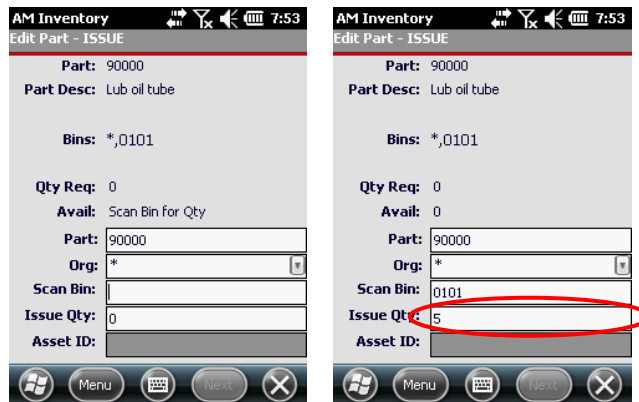
Issued To Field

- ☞ Scan or enter the part number



Populated Issued To Fields

- ☞ Select the **Organization** from the dropdown menu
- ☞ The UI should take you to the **Part Issue** screen
- ☞ Input the **Bin** number

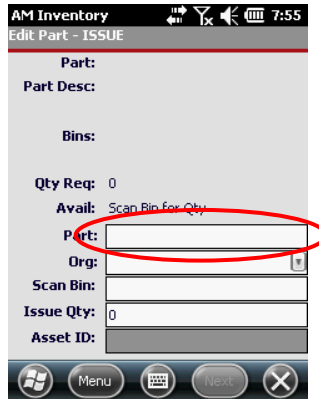


Populated Issued To Fields

- ☞ Input the **Quantity** to be issued in the **Issue Qty** field
- ☞ See **Saving the Record** on page 68 for options on saving the record

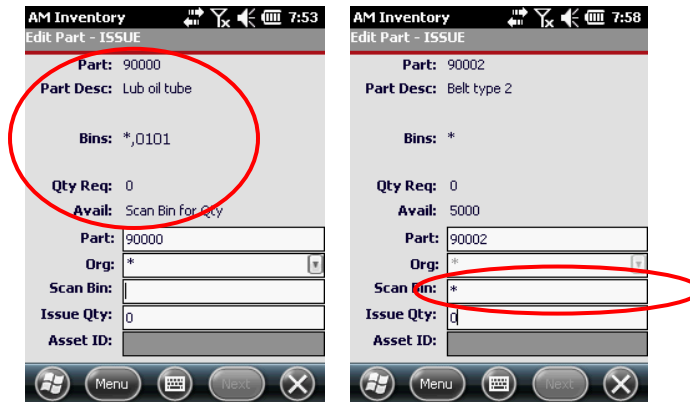
Entering Additional Parts

- ☞ If you have already entered and saved the first Part to the Issue record, the system will have refreshed to the following screen



Issue Part Screen

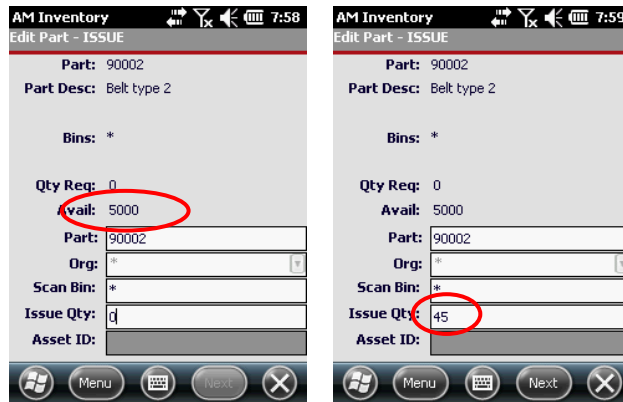
- ☞ **Scan** or enter the **Part Number** and either click in another field or press **Enter**
- ☞ The system will load the relevant data for that **Part**



Populating Issued To Fields

- ☞ If there are multiple selections for the bin, specify or scan the desired one

☞ The system will show the total **Available** quantity



Populated Issued To Fields

☞ Enter the **Issue Qty**

☞ See **Saving the Record** on page 68 (below) for options on saving the record

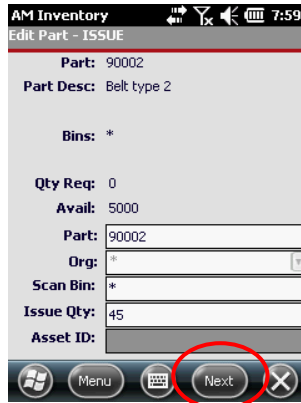
Saving the Record

There are two methods to committing the **Issue Part(s) / Return Part(s)** record to the system. You can either continue issuing additional parts or save the record and return to the main screen. This section applies to both issuing and returning parts, although only the **Issue Parts** screens are included.

☞ See **Issuing a New Part** on page 64 and **Entering Additional Parts** on page 67

Saving a Record with Next and Adding More Parts

- ☞ Enter all part information including **Part Number, Bin** and **Issue Quantity**

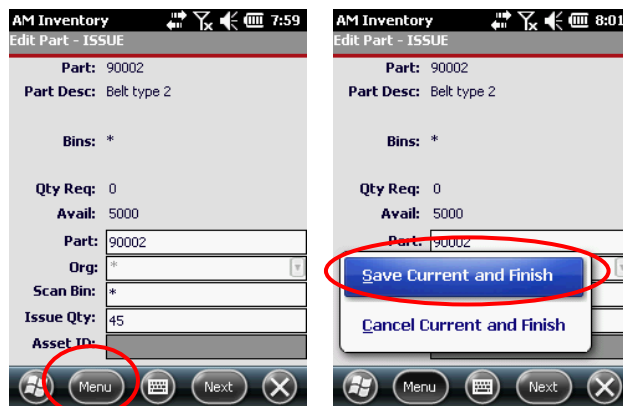


Populated Issue To Fields

- ☞ Click **Next** to commit the record to the **Issue**
- ☞ Repeat this process until all Parts are issued
- ☞ Proceed to **Saving a Record with the Menu and Exiting** below

Saving a Record with the Menu and Exiting

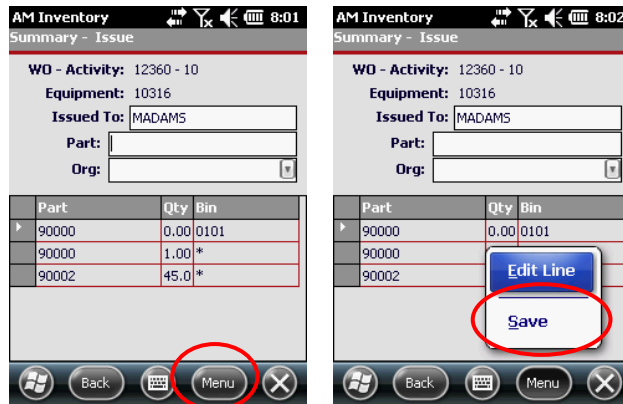
- ☞ Enter all part information including **Part Number, Bin** and **Issue Quantity**



Issued To Field

- ☞ Select **Menu** and **Save Current and Finish**

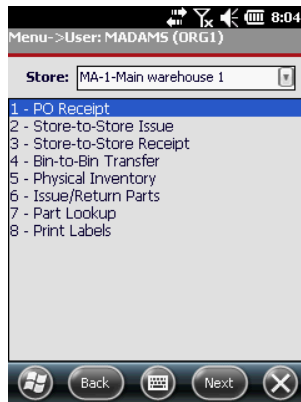
☞ The system will display all parts listed in the **Issue**



Save a Parts Issue

☞ Click **Menu** and select **Save**

☞ The screen will refresh to the Inventory **Main Menu**

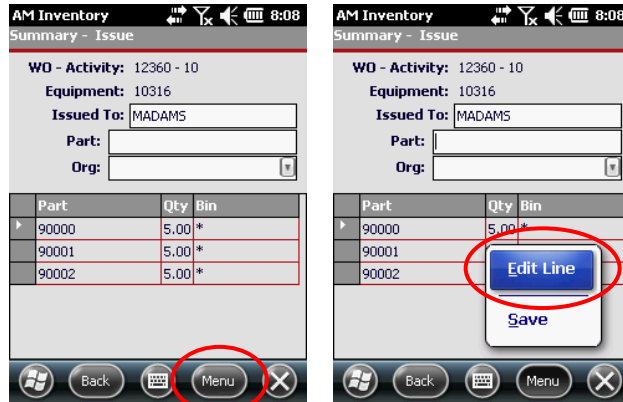


Clearing the Issue Return Saved Message

Editing Line Items in a Parts Issue

☞ See **Issue Parts** on page **64** for details on issuing parts

- ☞ Select the line item that you wish to edit

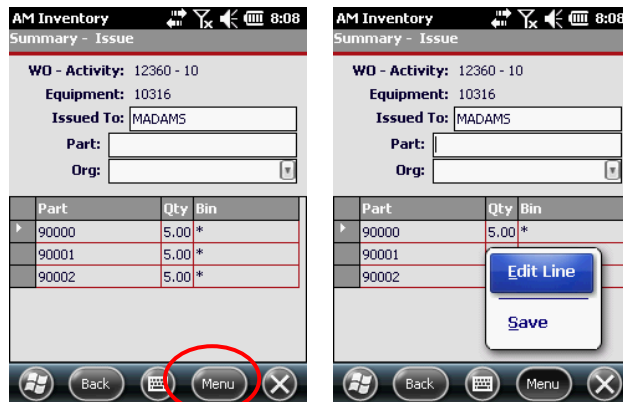


Editing Parts Line Items

- ☞ Click **Menu**
- ☞ Select **Edit Line**
- ☞ See **Entering Additional Parts** on page 67 for details on this process

Deleting Line Items from an Issue

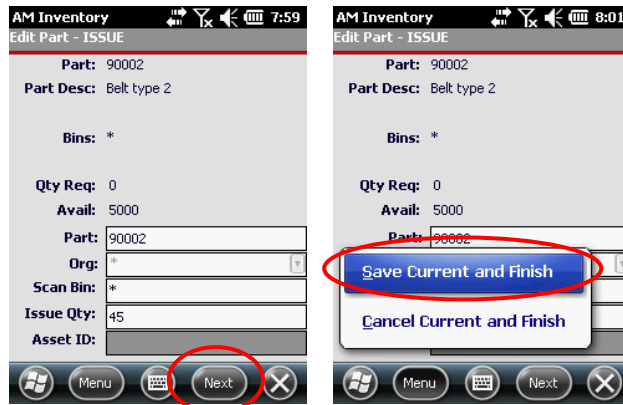
- ☞ See **Issue Parts** on page 64 for details on issuing parts
- ☞ Select the line item that you wish to delete



Deleting Parts Line Items

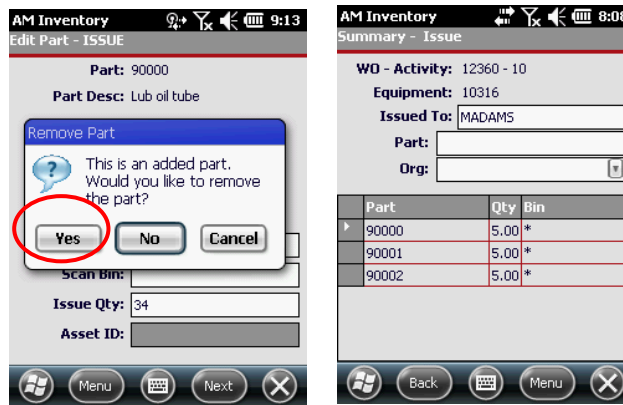
- ☞ Click **Menu**

- ☞ Select **Edit Line**
- ☞ Click **Menu**



Specify Zero on Qty

- ☞ Set value to zero (0), select **Cancel Current and Finish**
- ☞ When prompted if you wish to remove the part, select **Yes**



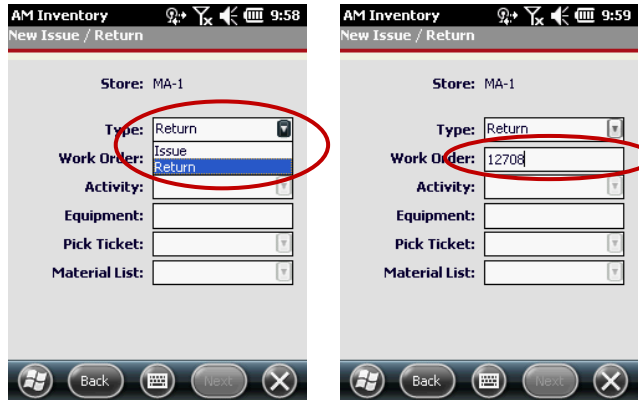
Confirm Removing Part

- ☞ The part will be removed from the issue
- ☞ Click **Back** to return to the main screen

Return Parts

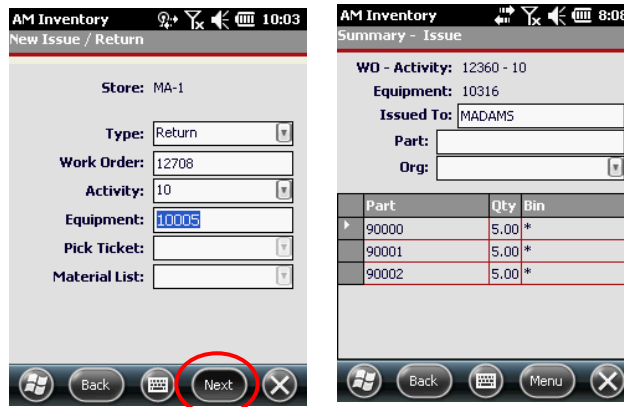
- ☞ See **Accessing 6 – Issue/Return Parts** on page **63** on how to get to this screen

- Click the **Type** dropdown and enter a valid **Work Order** number



Inventory Return Screen Population

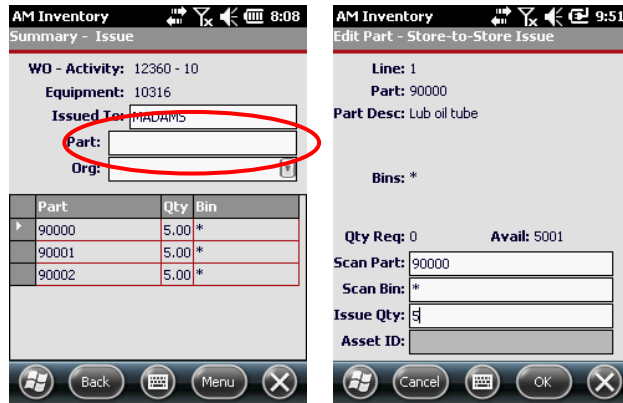
- Hit the **Enter** button on the device or click in another field
- Wherever applicable, select any values from the available dropdowns that are required to return parts, including **Activity**, **Pick Ticket** and **Material list**



Equipment List

- Click **Next**

- ☞ Scan or type in the part number you wish to return and hit **Enter** button on the device



- ☞ Specify the **Scan Bin** and the **Return Qty**
- ☞ See **Saving the Record** on page 68 on how to save records and complete the Return

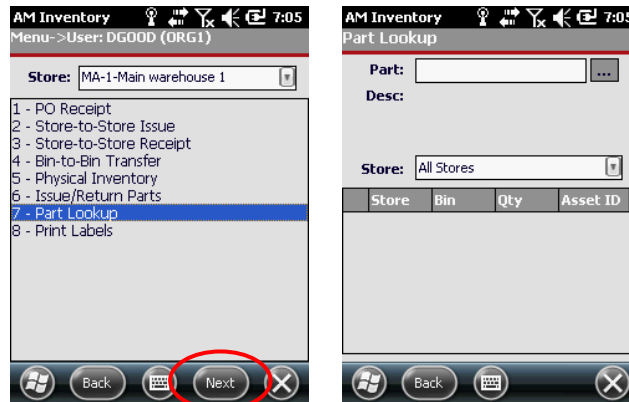
NOTE: The section **Saving the Record** is actually part of the **Issue** section of this document. However, the process and screens are identical except for the reference to either "ISSUE" or "RETURN" in the UI

7 - Part Lookup

- ☞ See Inventory Main Screen on page 12 for how to get to the Organizational Inventory Management screen

Accessing 7 – Part Lookup

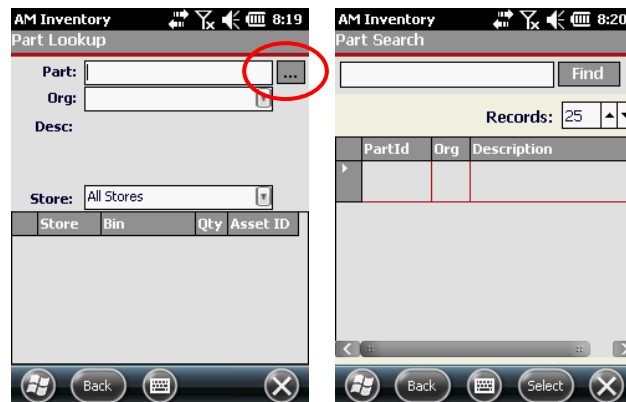
- ☞ Select **7 – Part Lookup** and click **Next**



Accessing the Part Lookup Screen

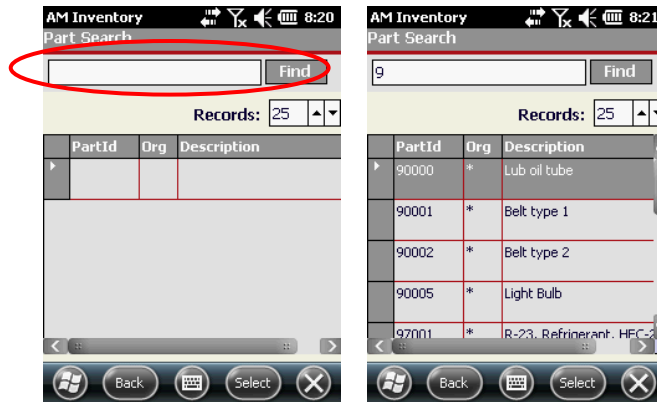
Searching For Unknown Part Numbers

- ☞ Click the **Search (...)** button



Part Lookup Screen

☞ Enter your search criteria

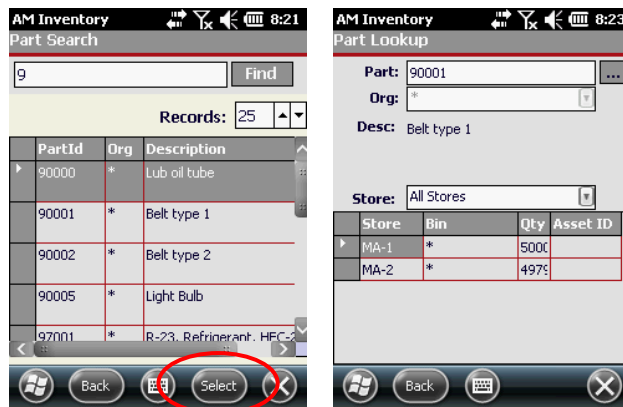


Searching for Parts

☞ Click **Find** and wait for the results to display

NOTE: Enter one or more characters in your search criteria and the system will match the character regardless of where it appears in a part number.

☞ Select the desired part



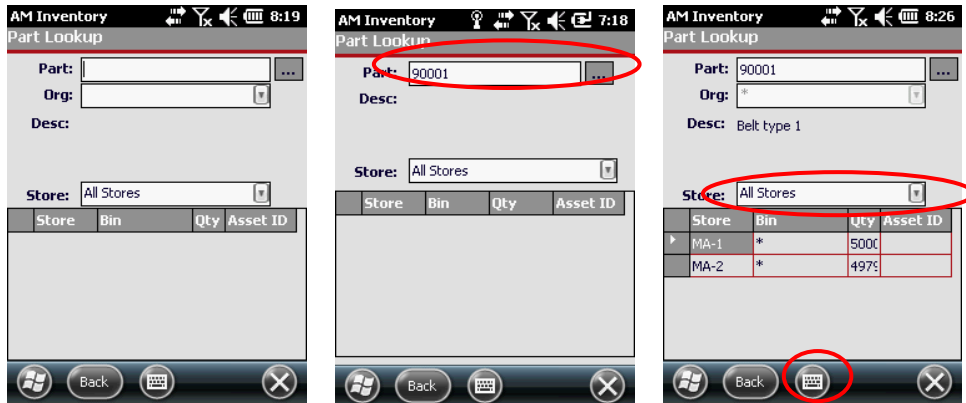
Selecting Parts

☞ Click the **Select** button

☞ The system will display all instances of that part in all store locations

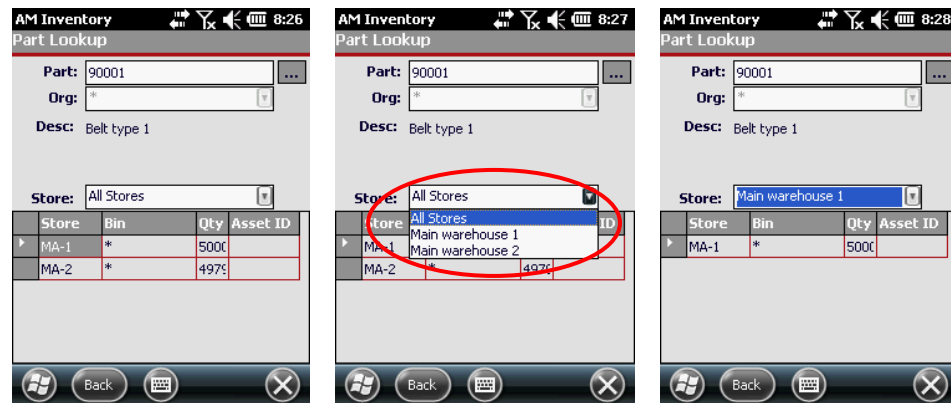
Searching Through Known Part Numbers

☞ Enter the known **Part Number**



Entering Known Part Numbers

- ☞ To submit the part number, click the **Store** dropdown
- ☞ Access the **Keypad** and hit **Enter** or click the physical **Enter** button on the device
- ☞ Review the **List**, use the **Store** dropdown to refine the search



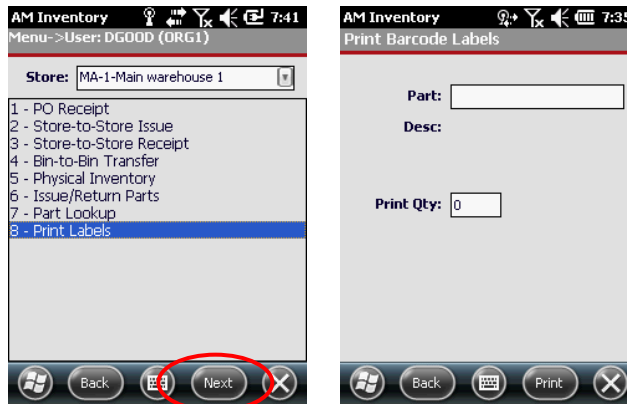
Part Filter Results Display

8 - Print Labels

- ☞ See **Inventory Main Screen** on page 12 for how to get to the **Organizational Inventory Management** screen

Accessing 8 – Print Labels

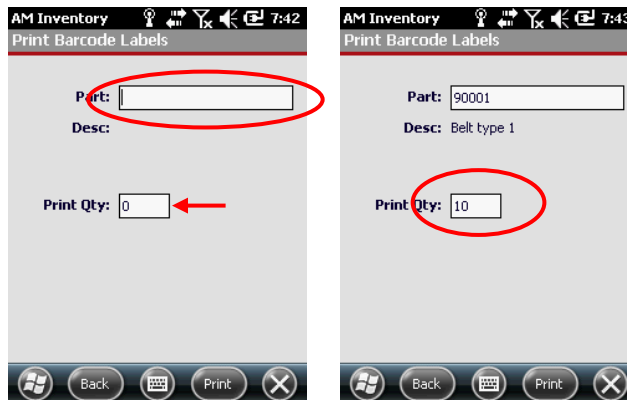
- ☞ Select **8 – Print Labels** and click **Next**



Print Labels

Printing Labels

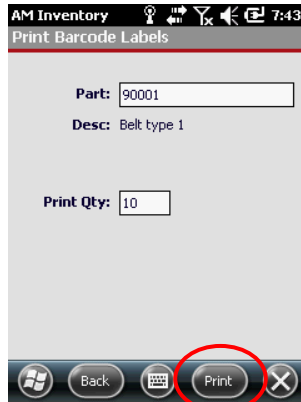
- ☞ Enter the **Part**: the number



Print Screen

- ☞ Enter the **Print Qty** and the **Desc** should populate automatically

☞ Click **Print**

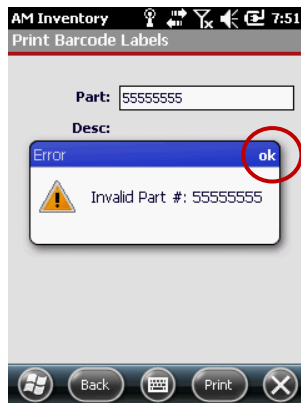


Text

☞ The system should begin printing labels. Please contact your **System Administrator** if this is not the case

Invalid Part Numbers

☞ If you see the following screen, the part number you've entered is not valid: click **OK**, verify your part number and re-enter



Invalid Part #

☞ Contact your System Administrator if the problem persists

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