

# Inventory Module

The Inventory module is used to record and track inventory and storeroom information. This Chapter describes how to use the Web Work Inventory module.

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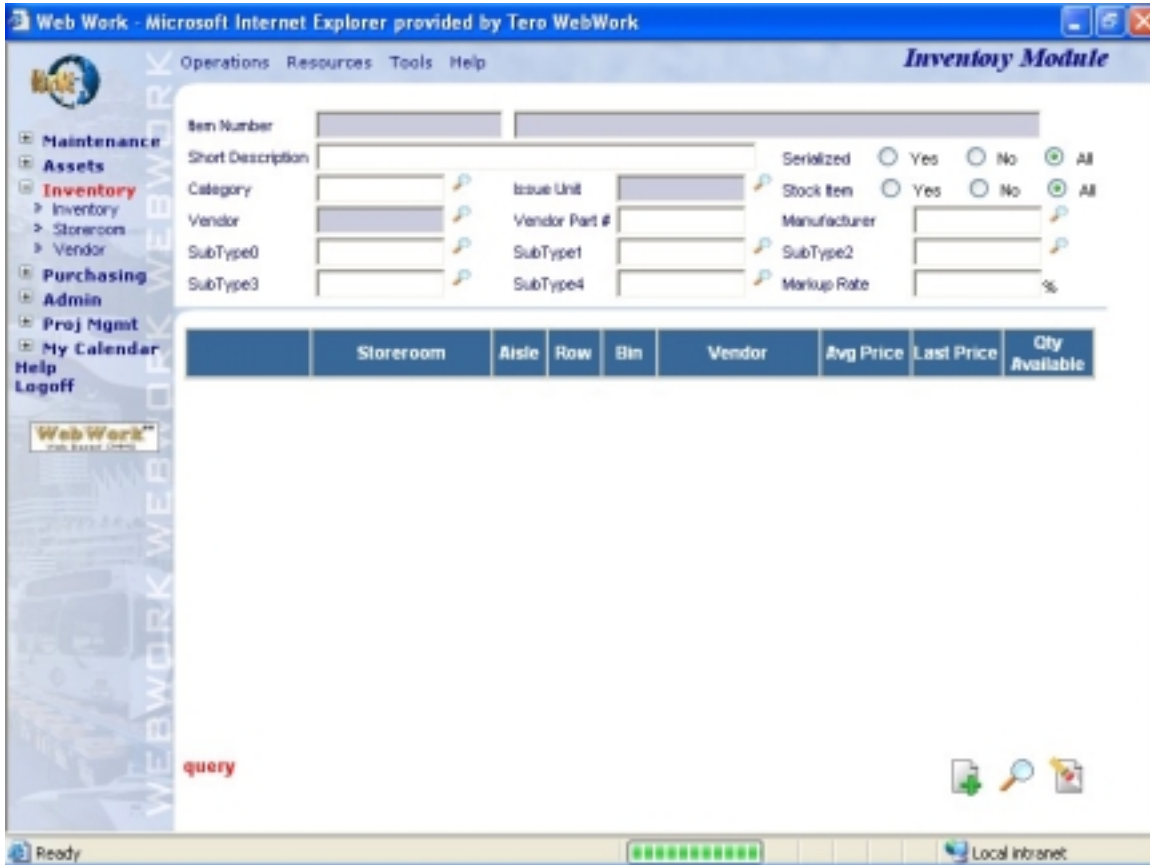
## 8.1 Overview of the Inventory Module

The Inventory module is where inventory items are entered into the Web Work system, where inventory items are assigned to the storerooms, and where inventory items are issued out of the storerooms.

Click on Inventory on the left hand side of the screen to access the Inventory module.



When you enter the Inventory module you will be in Query mode as shown in the screen below:



The **Operations Resources Tools Help** drop down menus contain the various features available in the Inventory module.




Web Work includes “help files” for all field labels. To access these help files, click on the field label. A pop up window will open displaying help for that field.

## 8.2 Adding New Items

The inventory module is used to record and track inventory items. There are three types of items Web Work tracks – inventory stock items, inventory non-stock items and non-inventory items. Identify all of your organization's inventory stock and non-stock items in the Inventory module.


To add a new inventory item:

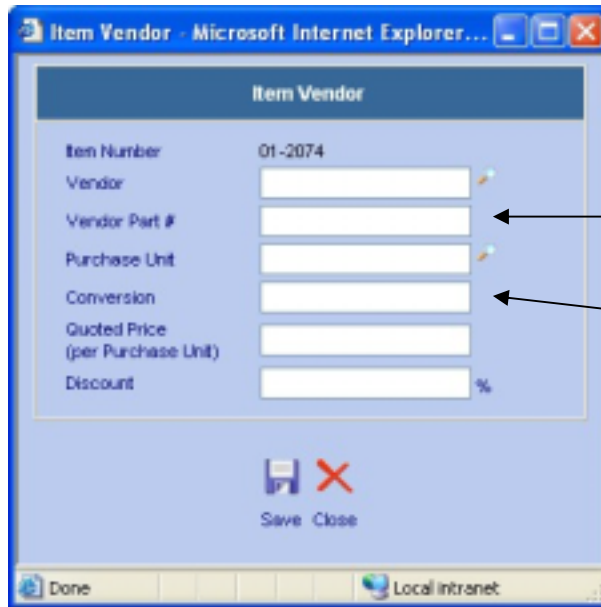


- Click on Inventory to access the Inventory module.
- Move the mouse over the Operations menu option to display the list of options.
- Select New Inventory Item from the drop down menu. Alternatively you may choose New Item (Auto Number) or click on the  button at the bottom of the screen.



A policy should be set to define how each new inventory item will be coded. If intelligent coding is the standard, then the New Inventory Item option should be used. If auto-numbering of new codes is the standard, then use the New Item (Auto Number) option.

- Enter information into the fields displayed on the screen. Note: *Item #, Description, Issue Unit and Vendor* are the required fields, all other fields are optional.
- Markup Rate: Used for charging the cost of materials to requesters. It is the percentage markup on the issue price of the inventory item.
- Click on the  button to save the new Item record. Item Vendor screens comes up as result of Save.
- An inventory item can be supplied by more than one vendor and each vendor may have its own supply price and unit of purchase. The Item Vendor screen is used to set up each vendor's unique information for that inventory item.
- The Item # and Vendor fields are populated by the Web Work system.
- Enter the Vendor Part Number.



Enter the Vendor Part #, this is the number the supplier uses to identify this part.

The Conversion Factor is the number of issue units for one purchase unit.



Item must be associated to at least one vendor. To associate additional vendors to an item, see section 8.3 Adding More Vendors to an Item of this chapter.

- Enter the Purchase Unit or click on the button to select the purchase unit from the Web Work database. (I.e. box, dozen, ton, etc.)
- Enter the Conversion Factor. The conversion factor is the number of issue units of an inventory item that is equivalent to one purchase unit of the same item.
- Enter the Quoted Price per purchase unit.
- Enter any applicable discount.



It is recommended that Vendor Part #'s are not used as Inventory Item Numbers in the Web Work system. This will avoid duplication of items with the same part number and will also avoid the need to change your inventory item # when a vendor changes their numbering system.

- Click on the button to save the vendor information and return to the main screen of the inventory record.
- Now on the main Inventory screen, you are in edit mode. You can edit the record or click on the button to add another inventory item.

### 8.2.1 Adding Inventory Item to Storerooms

Stock items are items within storerooms. Storerooms must first be created before making the association. Please refer to the Storeroom chapter on how to create new storerooms.

To add an inventory item to a storeroom:

- Go to query mode. When you are in the Inventory module move the mouse over the Operations menu at the top of the Inventory Screen to display the drop down menu and select Inventory Item Query or click on the button.

Perform query to retrieve existing item record of your choice.


- Move the mouse over the Resources menu at the top of the screen to display the drop down menu.
- Select Add to Storeroom from the drop down menu. The Storeroom window will open as pictured below:

Resources	Tools	Help
Main		
Add To Storeroom		
Specifications		
Where Used		
Vendors		
Show Open PO		
Related Equipment		

The screenshot shows a web browser window titled "Web Work - Microsoft Internet Explorer provided by Tero WebWork". The main content area is a form titled "Storeroom". The form has several sections:

- Item Information:** Item Number (01-2074), Description (GLASS THERMOPANE 27-5/8 X 45-7/8 X 1), Storeroom (dropdown), Aisle (input), Row (input), Bin (input).
- Vendor Information:** Vendor (GE), Vendor Part # (GLASS THERMOPA), Manufacturer (dropdown), Account (input).
- Price and Unit Information:** Last Price (80.00), Average Price (80.00), Quoted Price (80.00), Purchase Unit (EA), Conversion (1), Issue Unit (EA).
- Stock and Quantity Information:** Stock Level (0), Reserved Quantity (0), Qty Available (0), Quantity On Order (0).
- Reorder Method:** Radio buttons for "Min / Max" (unselected) and "EOQ Reorder Point" (selected).
- Stock Levels:** Max Stock / EOQ (input), Min Stock / Reorder Point (input).


At the bottom of the form, it says "Mode: new" and has "Save" and "Close" buttons. The browser's status bar at the bottom right shows "Local intranet".

- The Item Number and item description fields get populated by the Web Work system.
- Default Vendor information populates automatically. If more than one vendor is associated with the Item, the vendor information may be changed in at this time. The Vendor Part #, Last Price, Average Price, Quoted Price, Purchase Unit, Conversion and Issue Unit fields will be also populated automatically on entering a new vendor.
- Enter a storeroom or click on the storeroom  button to select a storeroom from the Web Work database.
- Enter an Aisle, Row and Bin locators if applicable.



Tero Consulting Ltd. provides services to assist with the setup and labeling of storerooms. Contact our head office for more information on this service.

- Enter the current Stock Level.
- Select the reorder method: EOQ or Min/Max.
- Enter appropriate values into the [Max Stock / EOQ](#) and [Min Stock / Reorder Point](#) fields depending what method was chosen.

- Click on the  button to save the item to this Storeroom and return to the Inventory record.




Items can be added to more than one storeroom by following the instructions above and changing the storeroom information.

### 8.2.2 Editing Storeroom information

- In Inventory module perform query to retrieve existing item record of your choice.
- A table listing the storerooms where the item is located will be displayed.

	Storeroom	Aisle	Row	Bin	Vendor	Avg Price	Last Price	Qty Available
ISSUE ITEM	MASTER				GE	\$80.00	\$80.00	0
ISSUE ITEM	EAST	4	12	7	GE	\$80.00	\$80.00	0
TOTAL								0

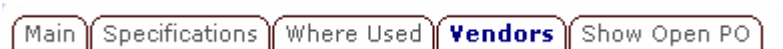
- Within the [Storeroom](#) column, highlight and click on the applicable storeroom in the table. The [Storeroom](#) screen opens.
- Edit Information as required.
- Click on the  button to save the updated information.

### 8.3 Adding More Vendors to an Item

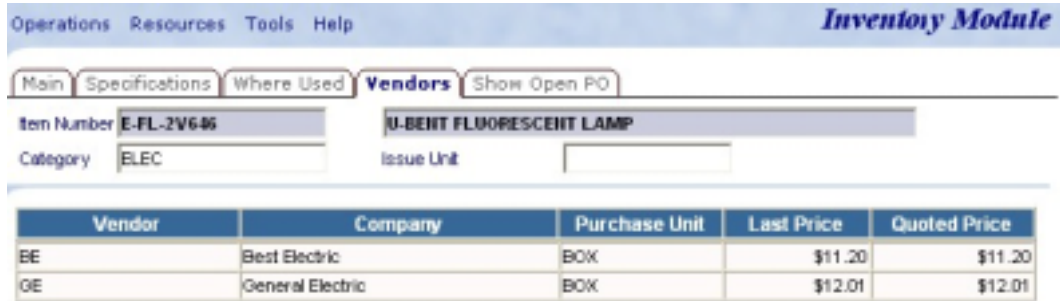
Your organization may have a preferred vendor for an inventory item and also a number of additional vendors for the same item, in case the preferred vendor does not have the stock or price you require.



To add an additional vendor for an inventory item:

- In Inventory module perform query to retrieve existing Item record you want to add more Vendors to.
- Move the mouse over the Resources menu and select Vendors from the drop down menu or click on the Vendors tab.



- The inventory record will open in Vendors mode. See sample picture below:




- Click on the  button to open the New Item Vendor window. The [New Item Vendor](#) screen pops up.
- Enter information about the vendor.
- Click on the  button to save the vendor information. The newly added vendor will be displayed in the table on the lower half of the inventory record.
- To add more vendors to the Item, repeat the last three steps.

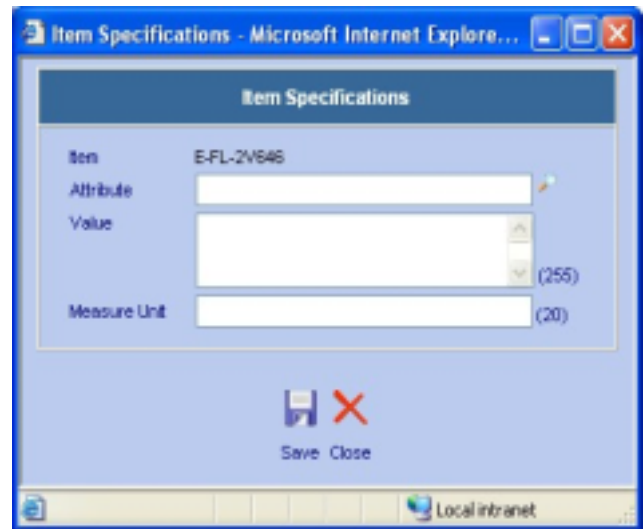
## 8.4 Inventory Specifications

Additional details about an inventory item can be added using the Specifications feature. You can later do searches on Inventory specifications to find Items with similar attributes.

### 8.4.1 Adding Item Specifications

To add specifications for an inventory item:

- In Inventory module perform query to retrieve existing item record you wish to add specifications to.
- Move the mouse over the Resources menu at the top of the screen and select [Specifications](#) from the drop down menu or click on the Specifications tab. The Specification screen populates.
- Click on the  button at the bottom of the screen to open the [Add Item Specifications](#) screen as pictured below:
- The Item field will fill in automatically with a current Item number. This is a Read Only field and cannot be edited.
- Enter an [Attribute](#). Attribute is the name of this specification (i.e.: Voltage, Weight, Dimensions, Colour)










- Enter a **Value**. Value is how much of the attribute name (i.e.: 110, 56, 1000, Dark Gray).
- Enter a **Measure Unit**. Measure Unit is a unit used to track the Value (i.e.: V or Volts, Kg or Kilograms, Ft<sup>2</sup> or Square Feet, leave blank for Color).



### 8.4.2 Adding Specifications by Template

You may also add specifications to an inventory item by first creating a template and adding the template of specifications to the item. This is beneficial if many items entered are similar in nature and therefore share same specification attributes and a template needs to be re-used on new items.

- In the Specifications screen, click on the  button at the bottom to open the Specification Template window as pictured to the right:
- Click the  button to create a new template.
- The Create Template window opens as pictured below:







- Enter a template name that identifies this template.
- Enter the Attribute, Value and Unit. Only the Attribute is mandatory. Click on  to save the attribute.
- Continue adding attributes to the template by repeating the step above.
- When done, click the  button to close the screen and return to the Specifications screen.
- The new template just created will become available in the Template pop-up list by clicking on the  button.

- To assign a specification template to an inventory item, click on the  button and select the template name from the Available Template drop down list followed by clicking on the  button.

### 8.4.3 Editing and Deleting Existing Templates


To edit or delete an existing Specification template:

- Select the template name from the Available Template drop down list and click the  button.
- You can change the value and measure unit of an attribute in the template.
- You can also add additional attributes to the template and then click the Save button  on the line.
- To remove an attribute from the template, click on the Delete button  of that attribute.
- When all attributes of a template are removed, the template itself will be deleted as well.
- You can also delete a template and all its attributes by clicking on the Delete button  at the bottom of the screen.



### 8.4.4 Editing and Deleting Existing Specifications

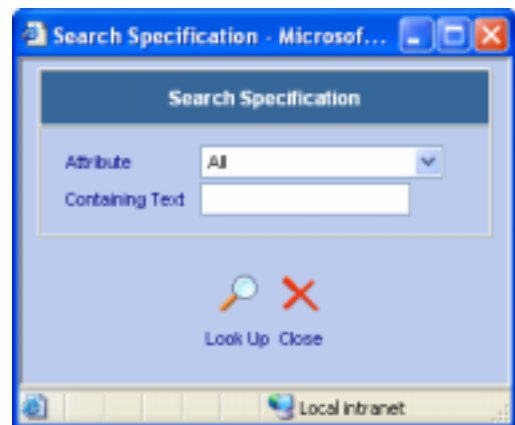
To edit specifications of an inventory item:


- By moving the mouse over the different specification lines, highlight appears over each line. Click on the line you wish to edit or delete. Edit Item Specification screen appears.
- You may edit the **Value** or the **Measuring Unit** only. If you wish to edit the **Attribute**, the whole line has to be deleted and started as a new Specification (see step below).
- To delete a specification, click on the  button. That specification gets deleted, you are now at the Specification screen.

### 8.4.5 Searching Specifications

The Search Specifications feature in Web Work permits you to query the Web Work database to locate inventory records with similar specifications.


- Click on the Operations menu to display the drop down menu.
- Select **Search Specifications** from the drop down menu. The Search Specification screen will open (see graphic):



- Select the Attribute by clicking on the drop down menu and choose an Attribute from list provided.
- Enter the text of the Attribute into the Containing Text field to further filter the Specification search. If Containing Text field is left blank, items with the selected attribute will be returned by the query.
- Click on the  button to perform the search. Query Result List comes up with matching Item Records:




The SELECT \* FROM Items...is an SQL statement, showing you what the criteria the query was using. For some, it may seem confusing at first, but it is useful to verify what exactly the query was looking for.



- Check off  any records you wish to retrieve. Click on [Select All](#) to retrieve all records. Then click on Retrieve Records or click on the  button at the bottom of the page to retrieve the records in edit mode. To retrieve only one particular record, place the mouse cursor over the line and click on the record.
- The selected Item record(s) appear in Inventory edit screen.

#### 8.4.4 Searching Vendor Part Number

The Search Specifications feature in Web Work permits you to query the Web Work database to locate inventory by using the vendor's part number.

- Click on the Operations menu to display the drop down menu.
- Select [Search Vendor Part Number](#) from the drop down menu. The Search Vendor Part Number screen will open:
- Enter the vendor in the Vendor field or click on the  button to select a vendor.
- Enter the portion or whole vendor part number you search for. If this field is left blank, the query will return all items whose primary vendor is the vendor entered in the field in the previous step.



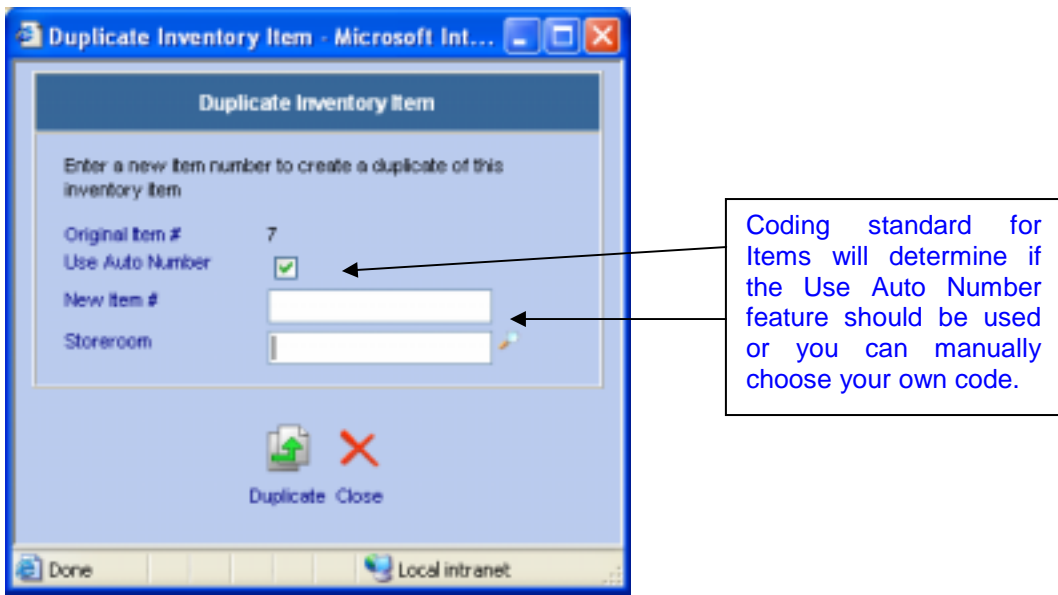
- Click on the  button to perform the search. Query Result List comes up with matching Item Records.
- Click off the check box beside each record you wish to retrieve. Click on [Select All](#) to retrieve all records. Then click on Retrieve Records or click on the  button at the bottom of the page to retrieve the records in edit mode. To retrieve only one particular record, place the mouse cursor over the line and click on the record.
- The selected Item record(s) appear in Inventory edit screen.



## 8.5 Duplicating Inventory Items

When creating new item records that are similar in nature, a duplicate inventory feature may be used to save on repetitious data entry.

To duplicate an inventory item:

- Perform query to retrieve existing item record you wish to duplicate.
- Place mouse cursor over the Operations menu to display the drop down list.
- Select Duplicate Item from the drop down menu. The Duplicate Inventory Item screen will open:



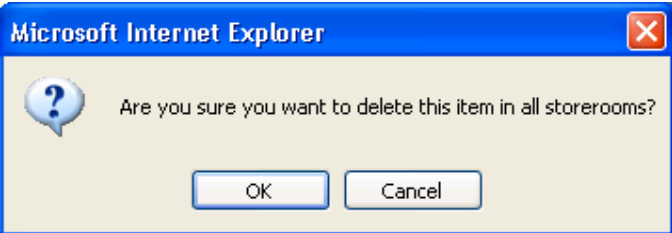
- To let Web Work generate a new unique code for the new item, click on the [Use Auto Number](#) checkbox. To specify the new code manually, uncheck Use Auto Number checkbox and type the new code into the [New Item #](#):
- Enter a Storeroom or click on the  button to select a Storeroom from the Web Work database. Note: the storeroom can be setup at a later time.
- Click on the  button to duplicate the inventory item and view the new record in edit mode.
- Edit information on the newly duplicated item as required.

## 8.6 Deleting Inventory Items

Caution should be taken when deleting any records from the Web Work database. However, there may be times when this is necessary. Web Work will not allow deletion of any items that are currently on approved Work Order or Item Request asking for that item or on an approved Purchase Order ordering that item.

To delete an Inventory item:

- Perform query to retrieve existing item record you wish to delete.
- Click on the Operations menu to display the drop down menu.
- Select [Delete Item](#) from the drop down menu.
- A message box confirming you want to delete the item from all storerooms will be displayed.



- To confirm you want to delete the inventory item, click on the OK button, to cancel this action and return back to the inventory record click on the Cancel button.

## 8.7 Item Issues and Returns

The Web Work Issuing feature is used to issue materials to a Work Order, Equipment, a Location, an Employee or an Account.

### 8.7.1 Issuing Single Inventory Item

- Perform query to retrieve existing item record you wish to issue.
- Click on [ISSUE ITEM](#) beside the storeroom from which you want the Item to be issued from.

	Storeroom	Aisle	Row	Bin	Vendor	Avg Price	Last Price	Qty Available
ISSUE ITEM	ELEC	4	4	4		\$507.60	\$507.60	21
ISSUE ITEM	MASTER					\$0.00	\$0.00	30
							TOTAL	51

- The [Issue Inventory](#) screen comes up:

The screenshot shows a web browser window titled "Issue Inventory - Microsoft Internet Explorer provided by Tero WebWork". The main content area is a form titled "Issue Inventory" with the following fields and values:

- Item No.: E-FL-2V646
- Serialized:
- Issue Date: 8/3/2005
- Issue Price: 507.6
- Add. Cost: 0
- Tax2: (empty)
- Charge Back:
- Markup: (empty)
- ChargeBack Tax2: (empty)
- Storeroom: ELEC
- Serial #: (empty)
- Picked Up By: (empty)
- Issue Qty: (empty)
- Tax1: (empty)
- Total Cost: (empty)
- ChargeBack Tax1: (empty)
- ChargeBack: (empty)
- Issue To: Workorder (dropdown)
- Deliver To: (empty)
- WO Number: (empty)
- Address: (empty)
- Equipment: (empty)
- Location: (empty)
- Account: (empty)
- Ship Phone: (empty)

At the bottom of the form, there is a button labeled "Issue Close" with a red X icon.

- The Item Number and Storeroom fields get filled in automatically.
- The Serialized checkbox will be checked if the item to be issued is a serialized item. For serialized item, the Serial # field has to be filled or selected from the serial number selection window.
- Enter the Issue Qty.
- Enter optional information into the Issue Date, Picked-up By, Add Cost, Deliver To and Address fields.
- Check the Charge Back checkbox if the material cost of the issue is charged to the requestor of the goods.




There is an option in the Admin module, Chargeback Material Expense, to configure if material costs are charged to the requesters. If the option is set to YES, the Charge Back checkbox will be checked automatically.

- Select what the item will be issued against in the Issue To Drop Down list. Options include Work Order, Equipment, Location, Account, and Employee. For work orders option, only approved work orders will appear on the selection list.



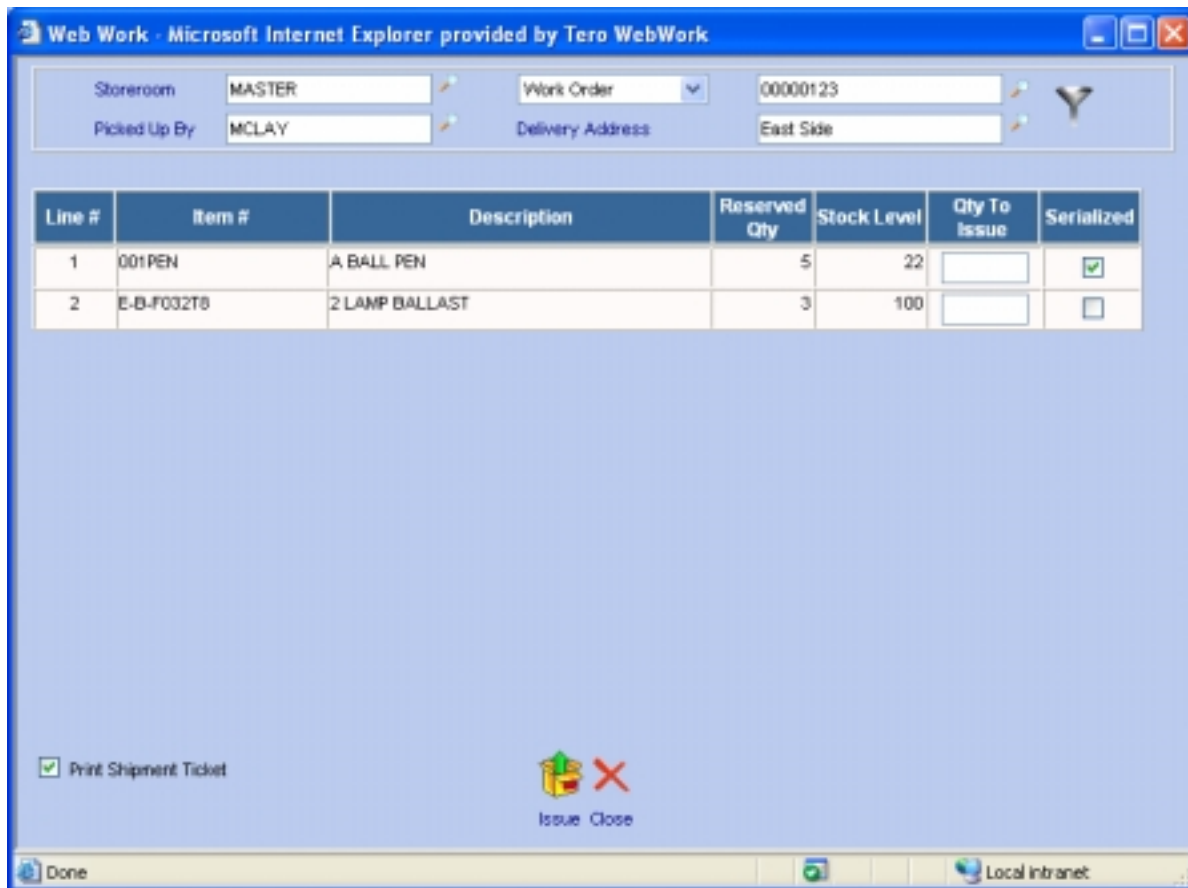
There is an option in the Admin module, Issue Reserved Items Only, to limit item issues only to items that are reserved by a work order! Contact your Web Work administrator to make appropriate changes.

- Account code may be specified all by itself or along with another selection like employee or location.
- Enter the Issue Quantity. The quantity specified in the Issue Qty field will be deducted from the current stock level. Fill in any other relevant information.
- Click on the  button to perform the issue.

### 8.7.2 Issuing Reserved Inventory Items


While the Single Inventory Issue does issues one item at a time, Issuing Reserved Inventory Items screen is used to issue multiple materials to Work Orders and Item requests asking for it. Only reserved items by Work Orders or Item Requests can be issued via this screen! Reserved items are items both estimated and approved.




- Click on [Operations](#) to display the drop down menu.
- Click on [Issue Reserved Items](#). The Issue Items screen comes up:

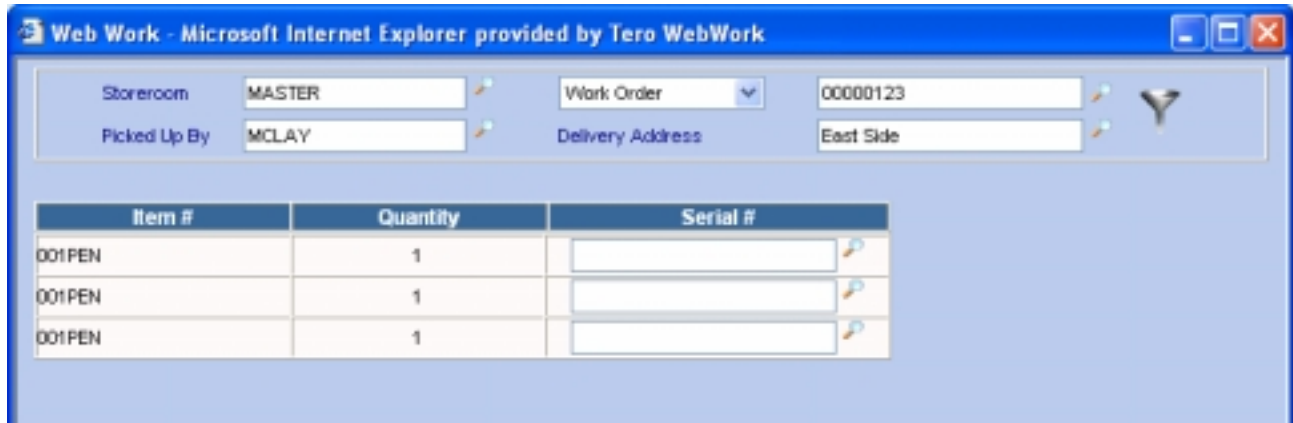





Line #	Item #	Description	Reserved Qty	Stock Level	Qty To Issue	Serialized
1	001PEN	A BALL PEN	5	22	<input type="text"/>	<input checked="" type="checkbox"/>
2	E-B-F032T8	2 LAMP BALLAST	3	100	<input type="text"/>	<input type="checkbox"/>

Print Shipment Ticket

 Issue Close

- Enter the storeroom name the items are to be issued from into the Storeroom field. Choose Item Request or Work Order from the drop down list, type in the work order / request number or pick it from a list by clicking on the  button.
- Perform the search by clicking onto the  button. Inventory items reserved for the selected work order / item request in the specified storeroom will be displayed.
- Note that reserved serialized items will have the Serialized checkbox checked. Serialized and non-serialized items cannot be issued at the same time.
- Enter the quantity you wish to issue from this storeroom to the work order / item request into the Qty To Issue field. Normally the Qty To Issue would match the Reserved Qty of that same work order / item request. Repeat for other lines if applicable. Leave the Qty To Issue field blank if you do not want to issue that item.
- Click on the  button to issue the selected items. For non-serialized items, if you issued only a portion of the requested amount, the Reserved Qty field will be updated to display the number reserved. If all requested items were issued the applicable row will no longer appear in this table.
- If the items being issued are serialized items, a new screen as pictured will come up:



- Enter the serial number of each item or click on the  button to select the serial number.
- Click on the  button to issue the selected items. If you issued only a portion of the requested amount, the Reserved Qty field will be updated to display the remaining reserve. If all requested items were issued, the applicable row will no longer appear.
- To print a shipment ticket, check off the Print Shipment Ticket checkbox. Once report prints to screen, click on File and select Print from the drop down menu to print the shipment ticket.
- When you are done issuing items, click on the  button to close the Issuing screen.




### 8.7.3 Issuing from Staging Area

In the Receiving module you there is an option upon doing a partial or full receipt to receive the goods to a temporary staging area. If the goods were received to this staging area, the Issues from Staging Area screen should be used to finish the issue transaction.

To issue from the Staging Area:

- Click on [Operations](#) to display the drop down menu, click on [Staging Area Issues](#). The Issue Items screen comes up:

	Issue To	Type	Item #	Description	Qty To Issue
<input type="checkbox"/>	REQ00000057	Item Request	X-007 D	Cement gun	1

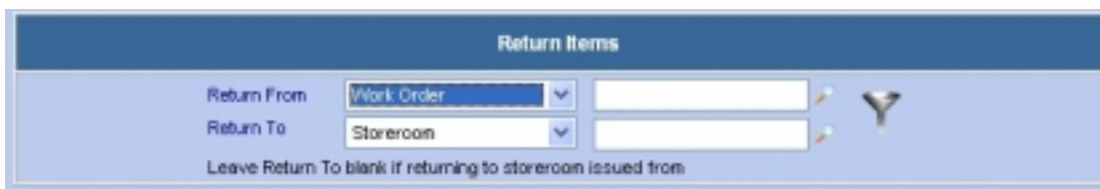
- Select the line to be issued by checking off  the box next to the line.
- To finalize the issue, click on the  button. The item is then issued from the staging area to the origin the item was bought for (work order, item request, account etc.)

### 8.7.4 Returning Non-Serialized Inventory Items

If items have been charged to a work order, item request, equipment, location, employee or account and were not used in the end, they may need to be returned to the issuing storeroom or to the vendor for repair. The Return Item Feature allows you to return the items back.

To return an item:

- Move the mouse over the [Operations](#) menu at the top of the Inventory Screen to display the drop down menu. Click on [Return Item](#). The following screen appears:

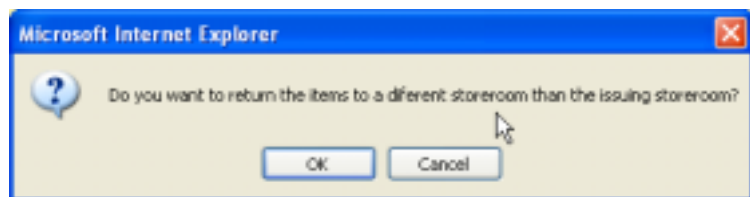


The 'Return Items' form contains the following fields:


- Return From:** A dropdown menu currently set to 'Work Order' and an adjacent text input field.
- Return To:** A dropdown menu currently set to 'Storeroom' and an adjacent text input field.

Below the fields is the instruction: "Leave Return To blank if returning to storeroom issued from".


- In the [Return From](#) drop down, select where you want the item to be returned from. Options include Work Order, Item Request, Equipment, Location, Employee, Account and Vendor/Repair Shop. Vendor/Repair Shop is used when an item has been returned to a vendor for repair and is now ready to ship back to the storeroom. Specify the code relevant to your selection in the field next to the drop down.
- In the [Return To](#) drop down, select where you want the item to be returned to. Options include Storeroom and Vendor/Repair shop. Then specify the code relevant to your selection in the field next to the drop down. When returning items to the issuing storeroom from sources other than the Vendor/Repair Shop, you can leave the Return To field blank. If the Return To field is filled out with different storeroom, a prompt message will come up asking if you



are returning the items to a different storeroom than the issuing storeroom. Click OK to return the items to another storeroom or Cancel to abort.

- Click on the  button to execute the search and the issued items will be listed as pictured:



Issue Date	Storeroom	Item #	Serial #	Quantity	Return Qty
8/8/2005	CENTRAL	MINIBULB (Mini Light Bulb 7W)		4	<input type="text"/>
8/8/2005	NORTH	BATTERYAA (AA Size Battery)		5	<input type="text"/>

- Specify the quantity of the item to be returned into the [Return Qty](#) column. Repeat this step until all relevant returns are entered.
- Click on the  button. All items are then moved from its origin and moved back to relevant storeroom or Vendor/Repair Shop.
- A list of items returned will be displayed.

Return To	Item #	Return Qty
TOOL	MINIBULB	Return failed. Item not set up in store.
TOOL	BATTERYAA	2




Note: you can return items to a different storeroom than the issuing storeroom only if the item has been set up in that storeroom or you will see a message in red as shown in the picture above.

- To return to Return Items screen, click  button, to close the Return items screen click on the  button.

### 8.7.5 Returning Serialized Items

Serialized items are items defined as both an Item within a storeroom and through the serial number it's also defined as a piece of equipment. Once this equipment is no longer needed in the field or has been broken and needs to be fixed, Web Work will track the equipment's move back to the storeroom (serialized Items) or the move to a repair shop and then back to the storeroom.

To return a serialized item from the field:

- Move the mouse over the [Operations](#) menu at the top of the Inventory Screen to display the drop down menu and click on [Return Item](#).
- Click on the  button to open up the Return Serialized Items screen:
- Enter the item number and the serial number of the item to be returned or enter the equipment representation of the item.

- From the Return To drop-down list, select either Storeroom or Vendor/Repair Shop. Then specify the code relevant to your selection in the field next to the drop down.

- Click the return  button to return the serialized item.



Once item is in Vendor/Repair Shop you can return the item again, this time to a storeroom. A full tracking of the item movement gets recorded so you always know where your item is!

## 8.8 Storeroom Transfers


The Web Work system allows you to transfer items from one storeroom to another storeroom. Both storerooms must be setup with that item number as stock item before the transfer.

### 8.8.1 Transferring Non-Serialized Items

To transfer an item from one storeroom to another storeroom:

- Perform query to retrieve an existing non-serialized item record you wish to transfer.
- Highlight the Qty Available for the storeroom the item is to be issued from (see sample picture below).

	Storeroom	Aisle	Row	Bin	Vendor	Avg Price	Last Price	Qty Available
ISSUE ITEM	AAA	3	4	5	HITACHI	\$25.00	\$24.50	34
ISSUE ITEM	CARP	2	3	4	HERMAN	\$27.00	\$27.00	0
ISSUE ITEM	MASTER				GRAINGER	\$7.90	\$7.90	0
TOTAL								34

- Click into that highlighted area. The Storeroom Transfer screen comes up:
- Item No. and Transfer From information get filled in automatically by Web Work.
- Specify the receiving storeroom in Transfer to field.
- Specify the quantity – how many of these items are to be transferred.
- Click on the  button to perform the transfer.



Once a storeroom transfer is performed, a transaction gets created in the IssueTrans table of the Web Work database. See the Custom Reports chapter to learn how you can create a report showing you the inventory transfers and many other reports like it. Also you may access the

transactional history by clicking on the  button.


### 8.8.2 Transferring Serialized Items

The Web Work system allows you to transfer serialized items from one storeroom to another storeroom. Both storerooms must be setup with that serialized item number as stock item before the transfer.

To transfer a serialized item from one storeroom to another storeroom:

- Perform query to retrieve an existing serialized item record you wish to transfer.
- Highlight the Qty Available for the storeroom the item is to be issued from. Click into that highlighted area (see sample picture below).

	Storeroom	Aisle	Row	Bin	Vendor	Avg Price	Last Price	Qty Available	
ISSUE ITEM	AAA	3	4	5	HITACHI	\$25.00	\$24.50	34	
ISSUE ITEM	CARP	2	3	4	HERMAN	\$27.00	\$27.00	0	
ISSUE ITEM	MASTER				GRAINGER	\$7.90	\$7.90	0	
								TOTAL	34

- Click into that highlighted area. The Storeroom Transfer screen comes up:
- [Item No.](#) and [Transfer From](#) information get filled in automatically by Web Work.
- Specify the receiving storeroom in [Transfer to](#) field.
- Specify the serial number of the item to be transferred to the other storeroom.
- You can transfer serialized item only one at a time.
- Click on the  button to perform the transfer.




### 8.9 **Where Used**

To view a list of equipment and the accompanying location/equipment where an inventory item is used, use the [Where Used](#) menu option.

To view where an inventory item is used:

- Perform query to retrieve existing item record you wish to see what equipment the item is being used on.
- Move the mouse over the Resources menu at the top of the screen and select [Where Used](#) from the drop down menu, or click on the [Where Used](#) tab.
- A screen similar to the one pictured below will open:

Equipment	Description	Location	Description	Quantity
00000001	Transmission's system	EW	EAST WING	10
00000014	AIR HANDLER UNIT	EW	EAST WING	1
00000060	Transmission's system	EW	EAST WING	1
00000061	Transmission's system	EW	EAST WING	1
00000062	Transmission's system	EW	EAST WING	1
00000069	AIR HANDLER UNIT	EW	EAST WING	1
00000079	new equipment test	Q2	Quadrant 2'3	5
AHU-01	AIR HANDLER UNIT			1
AHU-01-1	AIR HANDLER UNIT	EW	EAST WING	1
Arthur1	AIR HANDLER UNIT	EW	EAST WING	1
WTR-COOLER-02	Water Cooler	MALL	BIG TENANT'S MALL	1

- The table shows what Equipment in which Location the part is being currently used in as well as how many of these items are being used in each instance.
- To print this information, click on the  button.



To change or add equipment where this inventory item is used you must do so in the Equipment Module by updating the Parts list for the applicable piece of Equipment.


### 8.10 Show Open Purchase Orders for an item

Sometimes there are items on order. If you want to see what Purchase Orders are currently awaiting a receipt of this item, use the [Show Open PO](#) feature.

To see open Purchase Orders for selected item:

- Perform query to retrieve existing item record you wish to see Open POs for.
- Move the mouse over the Resources menu at the top of the screen and select [Show Open PO](#) from the drop down menu or click on the [Show Open PO](#) tab.
- The Show Open PO screen opens up, see picture below:

PO Num	Vendor	Date	Storeroom	Status	Ordered	Received
00000197	BBBB	2/16/2001			2	0

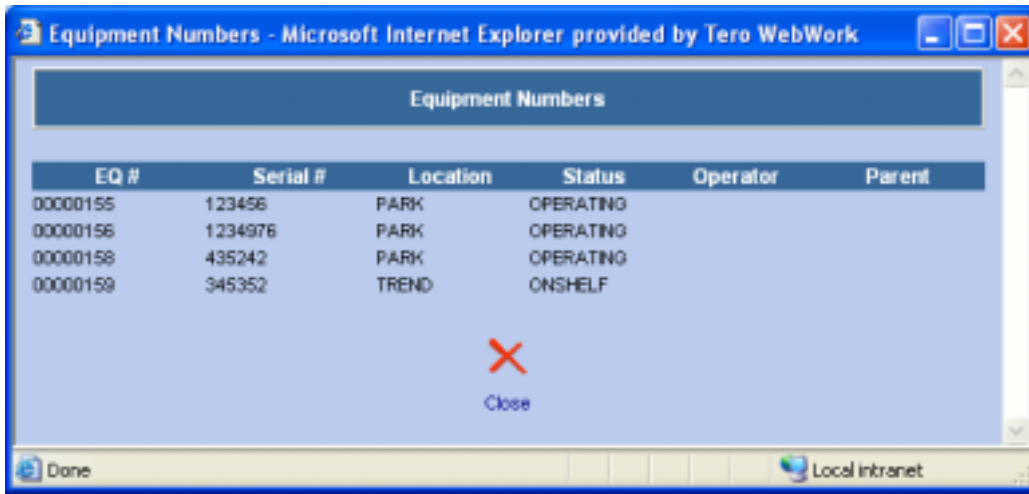
- If your system security permits you access to the Purchase Order module, you can view a single Purchase Order in the PO module just by highlighting the particular line and clicking upon it. The PO record opens up in the PO module.
- To print this information, click on the  button.

## 8.11 Related Equipment

For inventory items setup as serialized items, use the [Related Equipment](#) feature to see the item's representative equipment records.

To see serialized items as relevant equipment records:

- Move the mouse over the [Resources](#) menu at the top of the Inventory Screen to display the drop down menu.
- Select [Related Equipment](#) from the drop down menu. The Related Equipment window opens as pictured below.



## 8.12 Inventory Count

The Inventory Count feature allows you to make adjustments to stock levels for a group of inventory items within particular storeroom.

To print the Inventory Count sheet:


- Position the mouse over the Tools menu and select Inventory Count from the drop down menu.
- The Inventory Count screen opens. The upper portion of the Inventory Count screen is the filter area as pictured below:

The screenshot shows a filter area with the following elements:

- Storeroom:** A dropdown menu with the text '<Storeroom>'.
- Divergent records only:** A checkbox.
- Aisle From:** An input field.
- Row From:** An input field.
- Bin From:** An input field.
- To:** Three input fields corresponding to Aisle, Row, and Bin.
- Sort order:** Three input fields corresponding to Aisle, Row, and Bin.
- Saved Query:** A dropdown menu with the text '<Saved Query>' and a pencil icon.
- Query Name:** A text input field.
- Filter Button:** A funnel icon.

- To retrieve inventory records from a storeroom to adjust the stock level, you can do an ad hoc query or retrieve records from a saved query.



### 8.12.1 Perform an ad hoc query

- Select a storeroom from the drop down list.
- Enter the range of Aisle, Row, and Bin from which inventory records will be retrieved. (Optional)
- Indicate the sort order by Aisle, Row, or Bin by entering 1, 2 and 3 in the Sort order field. A smaller number means that column will be sorted first in the returned result set.
- To retrieve only those records whose current stock level in the database is not the same as the last stock level count, have the **Divergent records only** checked. Otherwise, all filtered records in the selected storeroom will be returned.
- Click the filter button  to retrieve the records.





### 8.12.2 Using a Saved Query

You can create a saved query that you can use repeatedly to retrieve records, without having to put in the filter criteria every time. To create a saved query:

- Select a storeroom from the drop down list.
- Enter the range of Aisle, Row, and Bin from which inventory records will be retrieved.
- Indicate the sort order by Aisle, Row, or Bin by entering 1, 2, and 3 in the sort order field.

- Enter a name to identify the saved query in the Query Name field. Note that the saved query name must be unique.
- Click the  button to save the query.
- Once the query is saved, the query name will appear in the [Saved Query](#) drop-down list.
- To retrieve only those records whose current stock level in the database is not the same as the last stock level count, have the [Divergent records only](#) checked. Otherwise, all filtered records in the selected storeroom will be returned.
- To execute the saved query, select the query from the Saved Query drop-down list and then click the  button.

### 8.12.3 Editing and Deleting a Saved Query

- Select the saved query to be edited or deleted from the Saved Query drop-down list.
- Click the  button.
- The saved [Edit Query](#) window opens:
- A saved query is changed by modifying the WHERE clause of the SQL statement. It is recommended that whoever changes the saved query should be well verse in SQL syntax.
- After the change, you can check the syntax of the modified SQL by clicking on the  button.
- Click the Save button  to save the changes or the Delete button  to delete the saved query.





### 8.12.4 Update Stock Level

- The new stock level of the retrieved inventory records can be updated in the lower portion of the Inventory Count screen as pictured below:



Item Number	Description	Stock Level	New Level	Remarks
MA901	Martz Parts	198		
ITEM2	Has Stock	38		
MOUSE 2	Mouse Two	0		
ITEM1	Has stock	556		
MOUSE 1	Mouse One	0		
E-B-P017T8	3 LAMP BALLAST	39		
Fiber01	Carbon Filter 01	6		
Widget01	Widget 01	7		
ITEM3	No Stock	39		
GRENADE	Hand Grenade	67		
BEARING01	bearing01	29		
BatteryAA	AA size alkaline battery	100		

- You may print an Inventory Count sheet by clicking on the  button.
- Enter the new stock level for items whose current stock level is not the same as the stock level recorded in the database.
- Put in remarks where necessary.
- Click the Save button  to save the new stock levels.

### 8.13 Checking Requested Items

Use the Check Requested Items screen to view and process a list of items requested by the Work Order or the Item Request modules. For Work Orders, requested items are items that are setup as Work Order material estimates and the status of the Work Order is approved. For Item Requests, requested items are items that are indicated as the Item Request line items and the Item Request record is approved.


To check for requested items:

- Move the mouse over the Operations menu at the top of the Inventory Screen to display the drop down menu.
- Select [Check Requested Items](#) from the drop down menu.




The Requested Items screen has a filter portion as pictured below:

Request Type	Both	Request #	
Open Date From	7/8/2005	To	8/8/2005

- The Request Type can be Work Order, Item Request, or Both.
- You may enter specific Work Order or Item Request number to the Request # field or leave the field blank and see a list of all requested items.

- Specify the range of Open Date for the work orders and/or item requests.
- Click on the filter button  to retrieve the records. The records will be listed like the picture below:

Res Item	Request #	Item #	Description	Req Qty	Storeroom	Create PO	Add To PO
<input type="checkbox"/>	R 00000098	Widget01	Widget 01	30	<input type="text"/>		
	R 1		po2	1	N.J.		
	R REQ00000095		test	1	N.J.		
	W 00003312	403-123	Pencil Sharpener	10	N.J.		
	W 00003312	RAZOR	test for deflt storeroom	6	N.J.		
	W 00003312	TEST1	test1 A*B*C*D	7	N.J.		

- A letter R to the left in the Request # column indicates the record is an item request, a W indicates a work order.
- Only inventory items from item requests can be reserved. Inventory items from work orders are reserved automatically when work orders are approved. Non-inventory items cannot be reserved but can be added to a new or existing purchase order via the Check Requested Items screen.
- To reserve inventory items for Item Requests, check off the box in the Res Item column. In the Storeroom column enter storeroom name for the item to be reserved or click on the  button to select a storeroom from the Web Work database. Click on the  button to reserve the items.
- To purchase new items instead of reserving, click on the  button under the Create PO or Add to PO columns. Create PO will create a brand new purchase order with that item. Add to PO will add the item to an existing purchase order of same vendor. A Purchase order selection screen comes up where you would then assign the existing purchase order (refer to Create PO for Requested Items or Add Requested Items to existing PO sections of this manual).






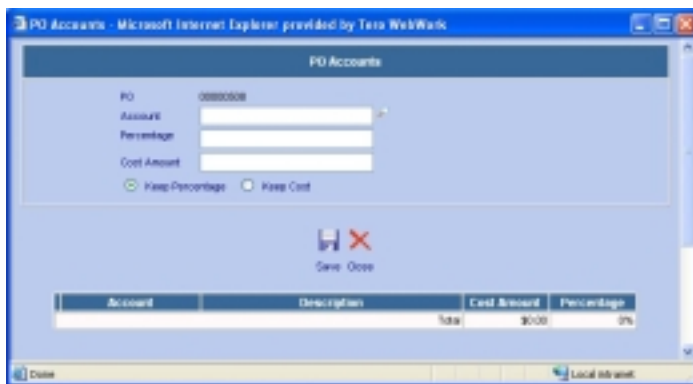
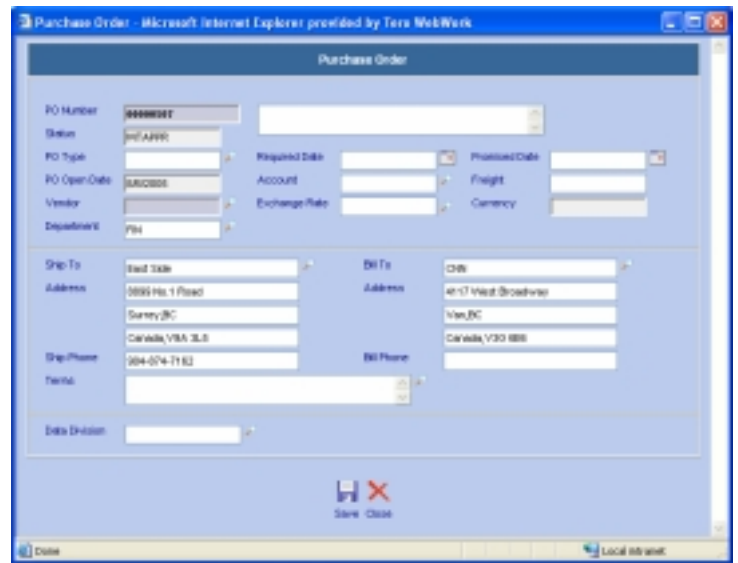
When an item is reserved it is added to a picklist and is ready for issuing. See Picklists and Issuing section of this manual for more information.


### 8.13.1 Create PO for Requested Items

If the stock level for the item requested is too low for a reserve or the item is a non-inventory item and there is no current open Purchase Order of that vendor, a new purchase order can be created for this item. The new Purchase Order will then be used for purchasing more of this item.

To create a new Purchase Order for an Item:

- Under the column **Create PO**, click on the  button to create a new Purchase Order. The New Purchase Order window will open:
- Enter description of the PO into the description field, Specify Vendor, add any relevant information. See Creating New Purchase Orders section of the User manual for additional information.
- Click on the  button to create a new PO. The **Purchase Order Item** screen comes up with the item and pricing information already populated.
- Fill in needed information, including the quantity. See Creating New Purchase Orders section of the User manual for additional information.
- Click on the  button to save the requested item to the PO.
- Once the requested item is saved to the PO, you will be returned to the Purchase Order screen. There will be an **Add Resource Account** link. Clicking on the link will bring up the Add Resource Account screen.
- Enter or select an account and put in either the cost percentage or cost amount. Check either the Keep Percentage or Keep Cost radio button.




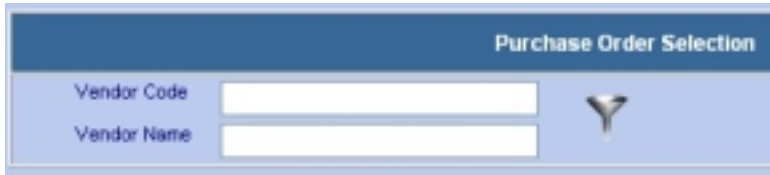
- Click on  button to add the resource account to the purchase order.
- You can repeat these steps to add more resource accounts to the purchase order.


### 8.13.2 Add Requested Items to Existing PO

If the stock level for the item requested is too low for a reserve or item is a non-inventory item but there is a current open Purchase Order of that vendor, the item requested may be added to an existing open Purchase Order rather than creating new Purchase Orders. The items can be purchased via an existing Purchase Order.

To add requested items to an existing purchase order:


- Under the column [Add to PO](#), click on the  Edit button. A [Select a Purchase Order](#) window will open:



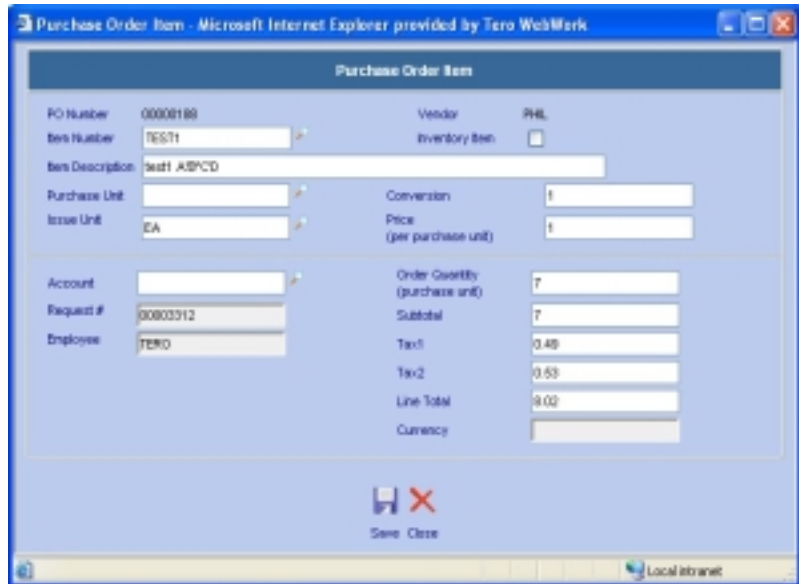
- Perform the search by the vendor or vendor name, click on the  filter button to see any available open POs for that vendor.
- Select a purchase order from the list. Note that only unapproved POs are available for selection unless Auto Approve PO system option is set to YES.

- The Purchase Order Item screen comes up:

- Fill in needed information, including the quantity. See [Creating New Purchase Orders](#) section of this manual for additional information.

- Click on the  button.

The existing open [Purchase Order](#) is updated with the requested item line.



## 8.14 Printing Request Pick List

A request picklist is the list of items requests that were reserved using the [View Requested Items](#) feature. Once printed, the list is used by the store keeper to make issuing of those items easier. The list provides the store keeper with the storeroom, location of the items in that storeroom, how many of these items are requested and more.

To print Request Picklist:

- Move the mouse over the [Operations](#) menu at the top of the Inventory Screen to display the drop down menu.
- Select [Print Requested Picklist](#) Items from the drop down menu.
- The Requested Picklist will open in a new browser window as pictured below:



## Request Picklist

7/29/2004

Storeroom: EAST


<u>Aisle</u>	<u>Row</u>	<u>Bin</u>	<u>Request #</u>	<u>Item Number</u>	<u>Item Description</u>	<u>Qty Req'd</u>	<u>Qty Taken</u>
			000020	0000001	15' iron bar	2	—
			000020	SUEME	testing for deleting	16	—
			000032	DISH HEATER	Dish Heater	2	—
			000038	TDT-C4	C4	7	—
4	2	18	000015	BALL	Round 12 inch	3	—
4	2	18	000020	BALL	Round 12 inch	40	—
4	2	18	000025	BALL	Round 12 inch	10	—
4	2	18	000076	BALL	Round 12 inch	2	—

## 8.15 Printing Inventory Records

There are two ways to print Inventory Records. You can print an individual Inventory record or print multiple Inventory records that you have selected and retrieved.

### 8.15.1 Printing Individual Inventory Records

To print only the Inventory record that is currently displayed on the Inventory screen:

- Perform query to retrieve existing item record you wish to print. The selected record will show in inventory Main screen in edit mode.
- Click on the  button. A few window with inventory Item report is displayed to the screen.
- In Internet Explorer, click on File and select Print from the drop down menu to proceed with printing to the printer.

### 8.15.2 Printing Multiple Inventory Records

To print a batch of inventory records:

- Perform an inventory query to retrieve the desired inventory records. The selected records will show in inventory Main screen in edit mode, showing 1 of x.
- Move the mouse over the [Operations](#) menu and choose [Print Selected](#) Items from the drop down menu. Inventory Item report is printed to the screen showing all selected items.
- In Internet Explorer, click on File and select Print from the drop down menu to proceed with printing to the printer.

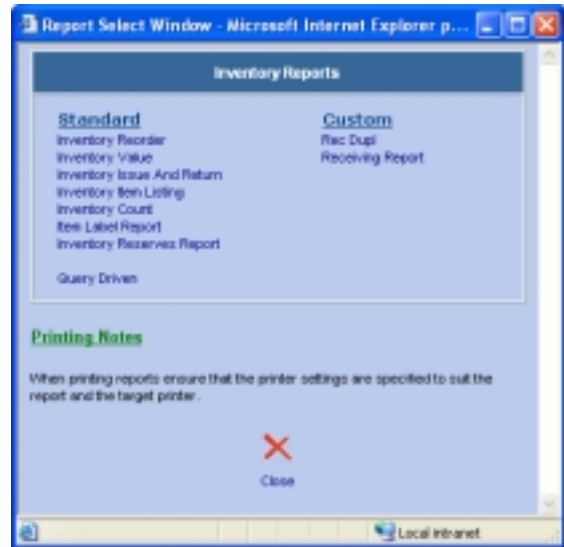
## 8.16 Inventory – Reports

To access Inventory reports move the mouse over the [Tools](#) menu and select [Reports](#) from the drop down menu.

- Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Inventory module will be displayed. To view all reports, click on the **REPORTS** module on the left hand side of the Web Work screen. For more information about custom reports, see the Reports section of this manual.



## 8.17 Links

When you are in the Inventory module and you select [Links](#) from the [Tools](#) menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.



You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

