



## Storeroom Module

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

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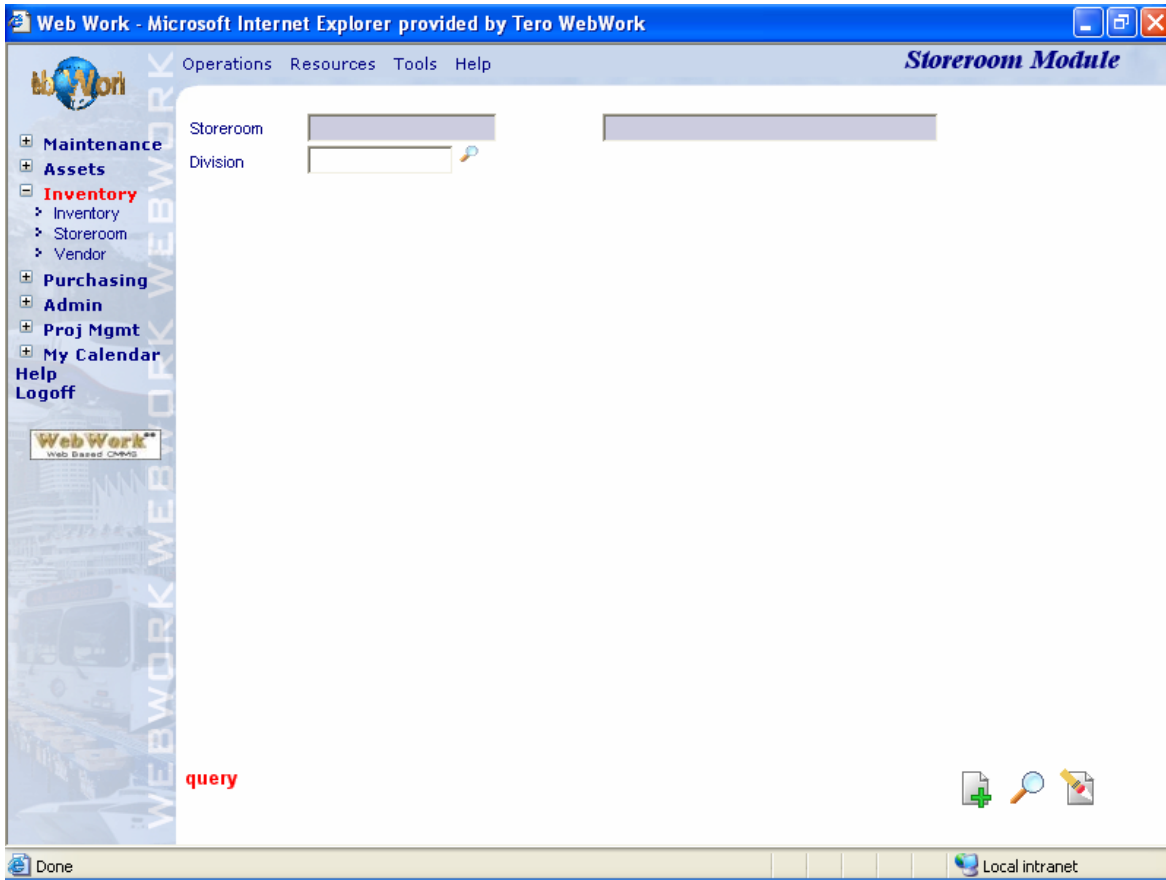
## 16.1 Overview of the Storeroom Module

The Storeroom module is where storerooms 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 Storeroom on the left hand side of the screen to access the Storeroom module.



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




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

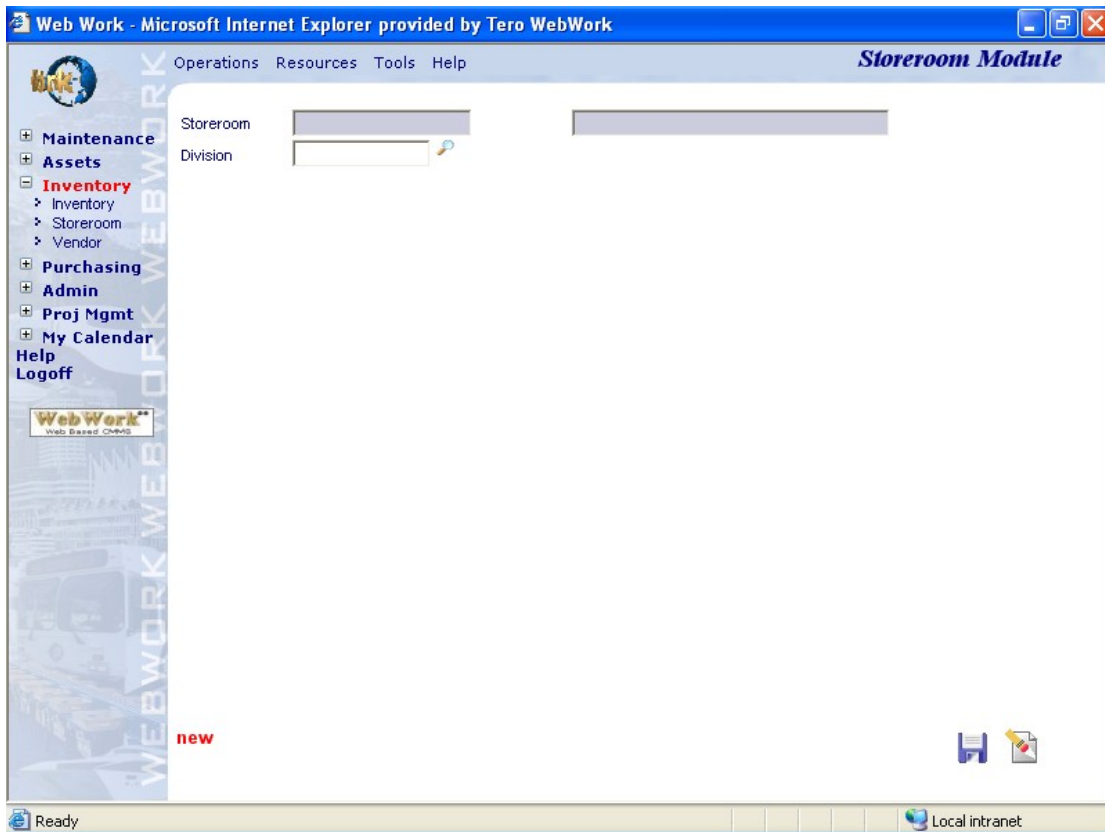
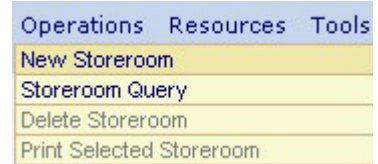




Web Work includes “help files” for all field labels. To access these help files, click on the field label. A popup window will open displaying help for that field.

## 16.2 Adding New Storerooms

To create a storeroom:

- Click on **Storeroom** on the left hand side to access the Storeroom module.
- The Storeroom module will open in query mode.
- Move the mouse over the Operations menu at the top of the screen and select New Storeroom or click on the  button at the bottom of the screen.
- The Storeroom module will open in New mode as pictured below:



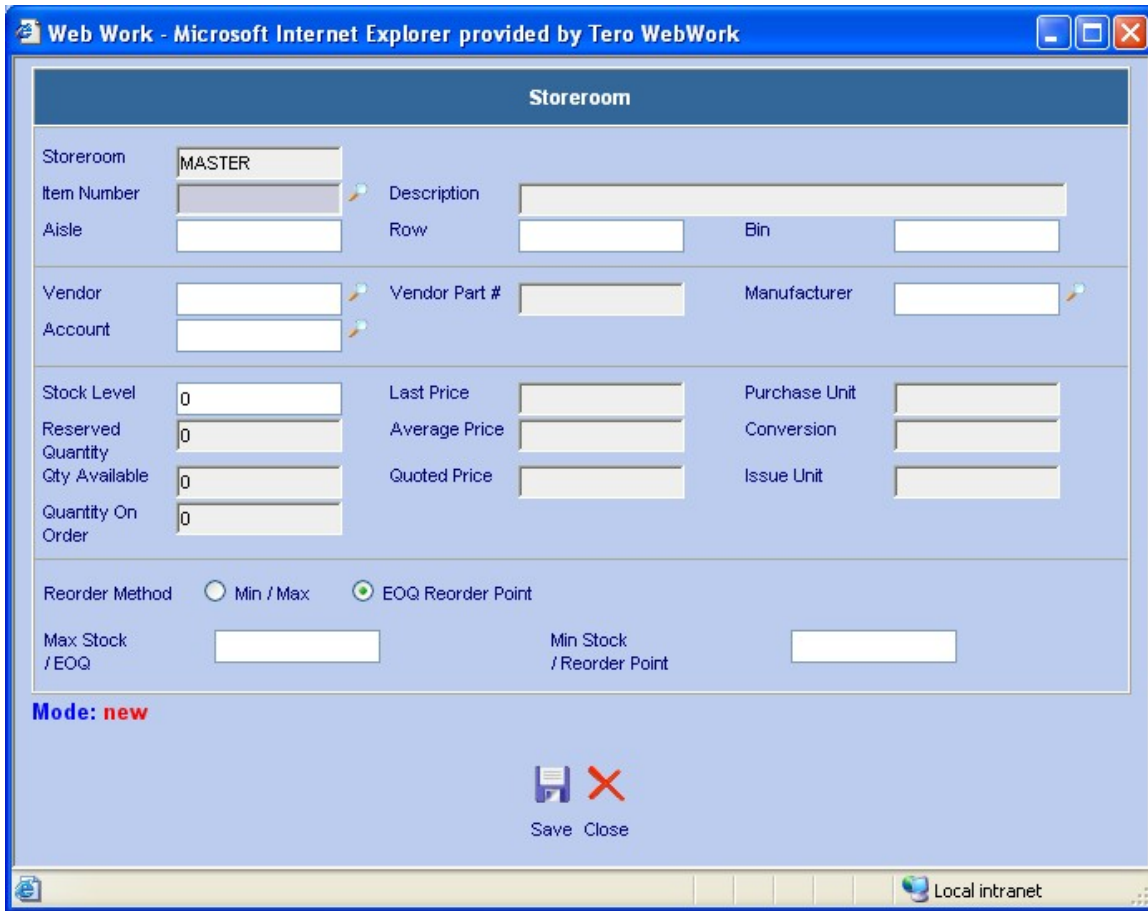
- Enter a new code and a description for the new storeroom into applicable fields.
- Click on the  button to save the new storeroom.
- You can edit the record, click on the  button to add another storeroom or add inventory items to this storeroom.


### 16.3 Adding Items to Storerooms

Inventory Items can be added to a storeroom from the Storeroom module.

To add an inventory item to a storeroom:


- In the Storeroom module, perform query to retrieve existing storeroom records of your choice.
- Move the mouse over the Resources menu option at the top of the screen to display the drop down menu.
- Select [Add Inventory Item](#) from the drop down menu.
- The Storeroom window will open. See example for reference:



- The Storeroom field is populated by the Web Work system.
- Enter an inventory item or click on the  button to select an item from the Web Work database. If a manufacturer was entered when you created the inventory item, this information will be populated on the storeroom screen.
- Enter 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.

- Once the Item is selected, 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 based upon the vendor entered.
- 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 on what method were chosen.
- Click on the  button to save the item to this Storeroom and return to the Storeroom record.

### 16.4 Editing Storeroom Information

Storeroom information can be edited in the Storeroom module.


To edit storeroom information:


- Perform query to retrieve existing storeroom record of your choice.
- Use the item filter and Item Description to display the applicable inventory items in this storeroom.


Item Number

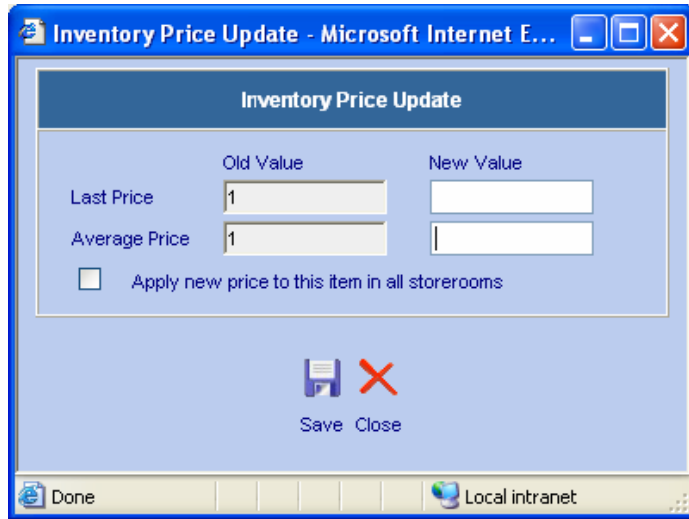
Item Description



 

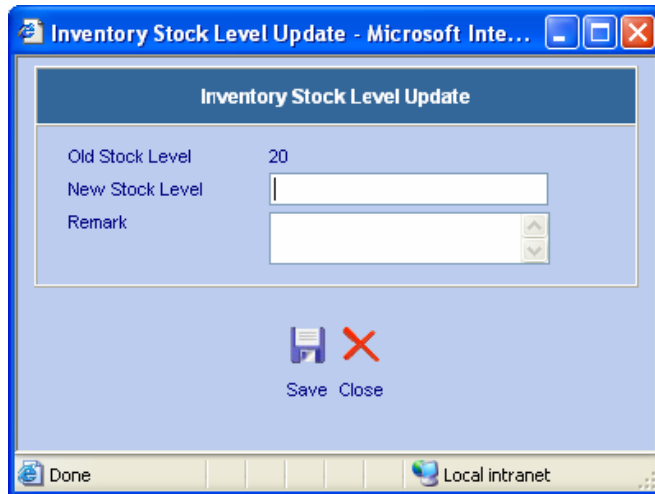
- Click the  button to display the inventory items.
- In the [Item Number](#) or [Item description](#) columns, highlight and click on the item line you wish to edit. The storeroom window opens.



	Item Number	Description	Vendor	Average Price	Last Price	Qty Available	
ISSUE	001PEN	A BALL PEN	AAAA	\$1.00	\$1.00	20	
ISSUE	101 102	Bearing	AAAA	\$2.00	\$3.00	99	
ISSUE	101-11	Bearing	ACE	\$0.95	\$0.95	2	

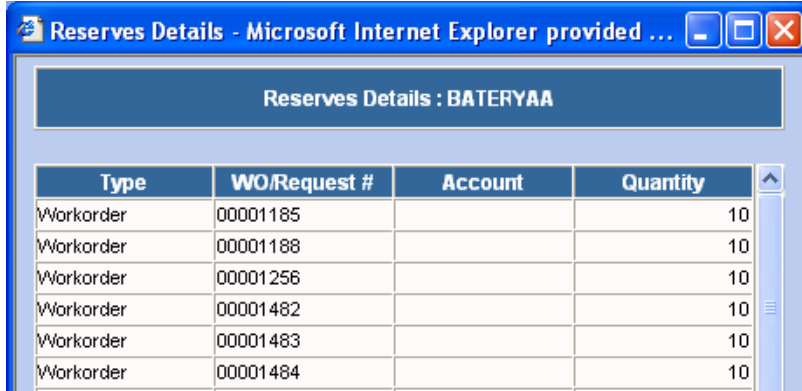
- Edit information as required.
- Adjust Last Price and Average Price by clicking on the  button next to Last Price and Average Price. A screen like below opens:



- Enter new price and click on the  button to save the updated information.
- Adjust inventory stock level by clicking on the  button next to Stock Level. A screen like below opens:



- Enter the new stock level and remark if necessary. Click the  button to save the updated information.
- You can view the reserve details of the item by clicking on the  button next to Reserved Quantity.



Type	WO/Request #	Account	Quantity
Workorder	00001185		10
Workorder	00001188		10
Workorder	00001256		10
Workorder	00001482		10
Workorder	00001483		10
Workorder	00001484		10

## 16.5 Deleting Storerooms

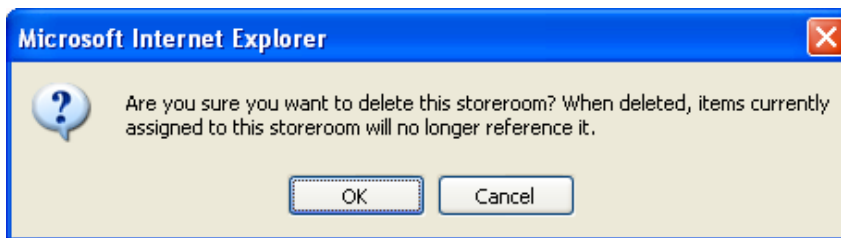
To delete a storeroom:

- Perform a storeroom query to retrieve the storeroom to be deleted.



Once a storeroom is deleted, all items that were assigned to the storeroom will no longer be referencing that storeroom. The items will lose the data unique to that storeroom like stock quantity, min/max levels, average and last price, aisle, row bin information and others. Deleting a storeroom will NOT delete any items, just the reference of the item to that storeroom.

- Click on the Operations menu and click on [Delete Storeroom](#) from the drop down menu.
- A message box will open confirming you want to delete the storeroom and all item references for that storeroom.



- Click on the OK button to delete the storeroom or the Cancel button to cancel this action and return to the storeroom record.

## 16.6 Item Issues

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

### 16.6.1 Issuing Single Inventory Item

- Perform query to retrieve the storeroom record from which items are to be issued.
- Click on **ISSUE** beside the Item Number which you want issued.

	Item Number	Description	Vendor	Average Price	Last Price	Qty Available
ISSUE	001PEN	A BALL PEN	AAAA	\$1.00	\$1.00	20
ISSUE	101 102	Bearing	AAAA	\$2.00	\$3.00	99

- The **Issue Inventory** screen comes up.

**Issue Inventory**

Item No. E-FL-2V646 Storeroom ELEC

Serialized  Serial #

Issue Date 8/3/2005 Picked Up By

Issue Price 507.6 Issue Qty

Add. Cost 0 Tax1

Tax2  Total Cost

Charge Back  ChargeBack Tax1

Markup  ChargeBack

ChargeBack Tax2

---

Issue To Workorder  Deliver To

WO Number  Address

Equipment

Location

Account  Ship Phone

Issue Close

Local intranet



- 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 requester.




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.



There is an option in the Admin module, Issue Reserved Items Only, to limit item issues to items that are reserved by a work order only! Contact your Web Work administrator to change this setting if items that are not reserved are to be issued.

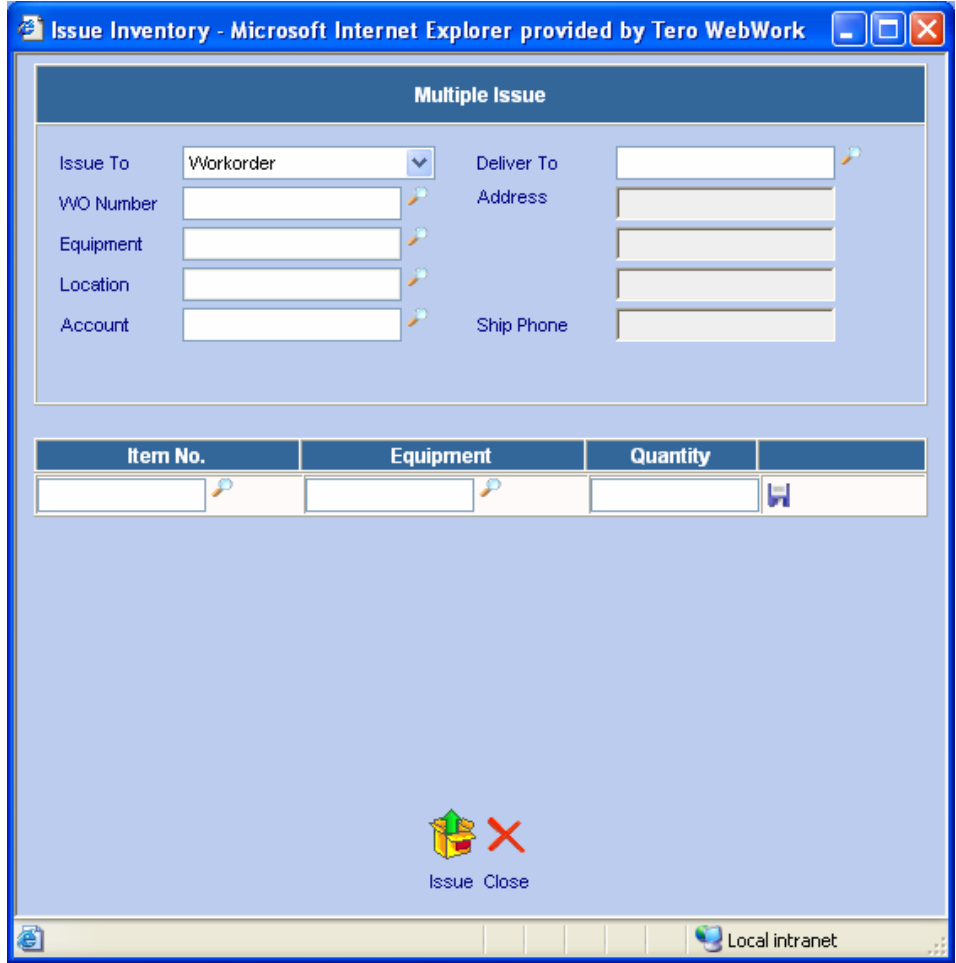
- Account information may be specified all by itself or with another selection.
- Click on the Issue button  to perform the action. The item quantity specified in the Issue Qty field will be deducted from the current stock level.

### 16.6.2 Issuing Multiple Inventory Items

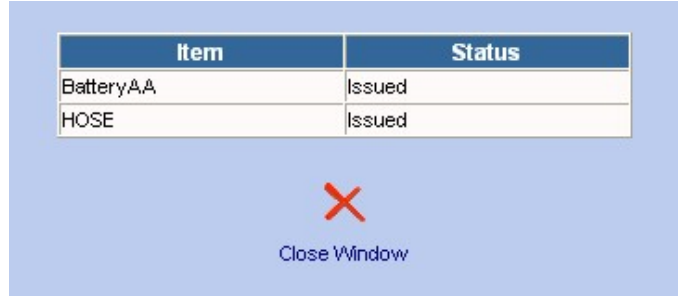
- Perform query to retrieve the storeroom record from which items are to be issued.
- Click the  button next to the item number and description filter.

Item Number	<input type="text"/>		
Item Description	<input type="text"/>		


- The multiple issue screen opens as pictured below:



- Select what the item will be issued against in the Issue To Drop Down list. Options include Work Order, Equipment, Location, Account, and Employee.
- Account information may be specified all by itself or with another selection.
- For non-serialized items, enter the item number and the quantity, then click button.
- For serialized items, enter the equipment number or click to look up the serialized items available in the storeroom. Click to save the items to be issued to memory.
- Note that items are not issued when you click the button. They are saved in memory to be issued in a batch. You can remove items from the to-be-issued list by click on the button on the same line.
- When you are ready to issue the items, click the button at the bottom of the screen.
- The issue confirmation screen will tell if the issues are successful, as pictured below:



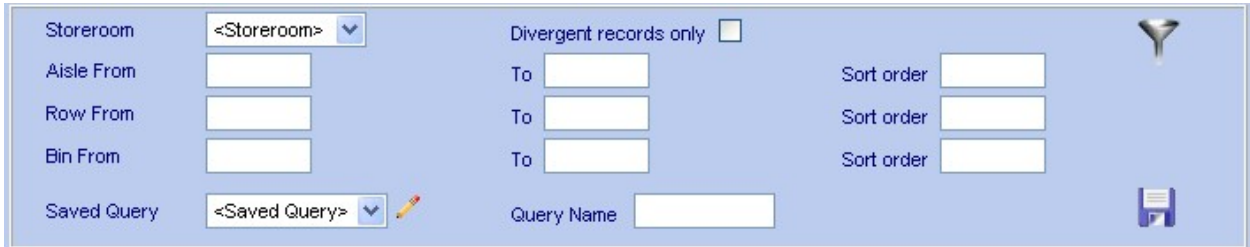
Item	Status
BatteryAA	Issued
HOSE	Issued

  
Close Window

## 16.7 Inventory Count

The Inventory Count feature allows you to make adjustments to stock level of an inventory item in a storeroom.


- 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:



Storeroom: <Storeroom> [dropdown]  
Aisle From: [text]  
Row From: [text]  
Bin From: [text]  
Saved Query: <Saved Query> [dropdown] [edit icon]  
Divergent records only:   
To: [text] [text] [text]  
Sort order: [text] [text] [text]  
Query Name: [text] [save 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.

### 16.7.1 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.

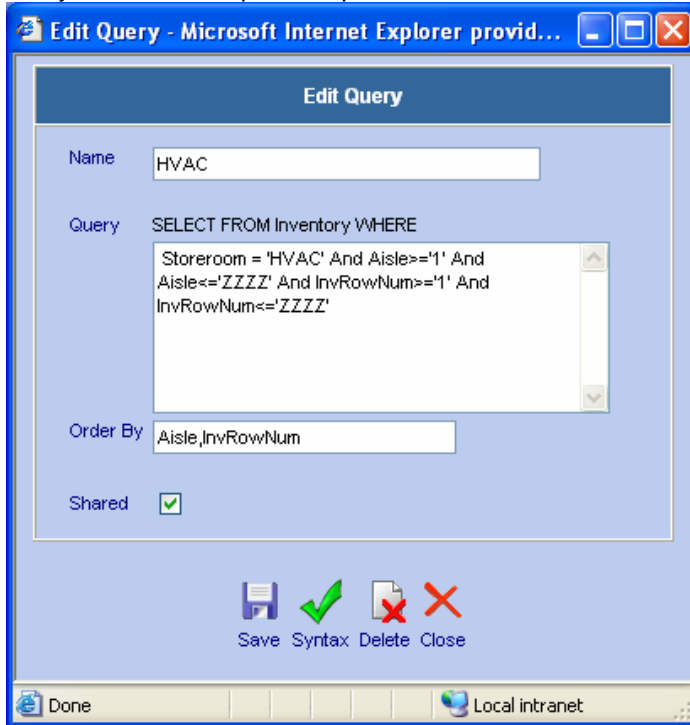
### 16.7.2 Using a Saved Query




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 records from a saved query, select the query from the Saved Query drop-down list and then click the  button.
- 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.

### 16.7.3 Editing and Deleting a Saved Query

- Select the saved query to be edited or deleted from the Saved Query drop-down list.
- Click the edit button .
- The Saved Query edit window opens as pictured below:








- 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 check syntax button .
- Click the Save button  to save the changes or the Delete button  to delete the saved query.

### 16.7.4 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
MARK1	Marks Parts	198	<input type="text"/>	
ITEM2	Has Stock	38	<input type="text"/>	
MOUSE 2	Mouse Two	0	<input type="text"/>	
ITEM1	Has stock	556	<input type="text"/>	
MOUSE 1	Mouse One	0	<input type="text"/>	
E-B-F017T8	3 LAMP BALLAST	39	<input type="text"/>	
Filter01	Carbon Filter 01	6	<input type="text"/>	
Widget01	Widget 01	7	<input type="text"/>	
ITEM3	No Stock	39	<input type="text"/>	
GRENADE	Hand Grenade	57	<input type="text"/>	
BEARING01	bearing01	29	<input type="text"/>	
BatteryAA	AA size alkaline battery	100	<input type="text"/>	

    
Save Close Print

- You may print an Inventory Count sheet by clicking on the Print button .
- Enter the new stock level of 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.