

DataSplice®

Mobile Computing

Remote Client User Manual

Inventory Views

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DataSplice, LLC
414 E. Oak Street
Fort Collins, CO 80524
Web: <http://www.datasplice.com>
Email: datasplice@datasplice.com
Phone: 800.377.1974
Fax: 970.484.0965

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Introduction

Purpose

This manual details the usage and behavior of the DataSplice Remote Client. The views examined in this guide represent a typical set of inventory views for a Computerized Maintenance Management System (CMMS) environment. This guide will discuss the typical behavior of these views when used under normal conditions.

It is important to remember that other implementations may require completely different views. All views can be completely customized to fulfill the specific needs of any application. Modifications made to the views by administrators are not reflected in this document.

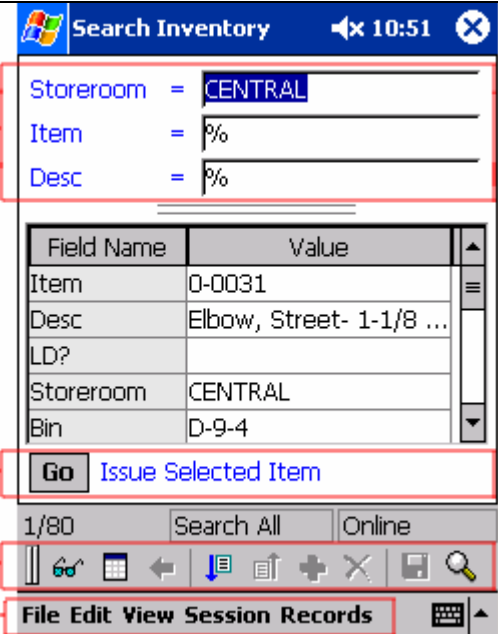
For additional documentation and support resources, please visit <http://support.datasplice.com>.

Version Information

The information in this document is valid and current with DataSplice version **2.3.10.0**.






User Interface

The first step in learning how to successfully use the DataSplice Remote Client is to familiarize yourself with the user interface of the program. The user interface can be broken down into a few important general sections:

User Interface													
<ol style="list-style-type: none"> 1. Toolbar Buttons 2. Menus 3. Navigation 4. Filters 	 <p>The screenshot shows the 'Search Inventory' application window. At the top, there is a title bar with the Windows logo, the text 'Search Inventory', a volume icon, the time '10:51', and a close button. Below the title bar are three input fields: 'Storeroom = CENTRAL', 'Item = %', and 'Desc = %'. A red box labeled '4' encompasses these three fields. Below the input fields is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Field Name</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Item</td> <td>0-0031</td> </tr> <tr> <td>Desc</td> <td>Elbow, Street- 1-1/8 ...</td> </tr> <tr> <td>LD?</td> <td></td> </tr> <tr> <td>Storeroom</td> <td>CENTRAL</td> </tr> <tr> <td>Bin</td> <td>D-9-4</td> </tr> </tbody> </table> <p>Below the table is a 'Go' button and the text 'Issue Selected Item', which is highlighted with a red box labeled '3'. At the bottom of the window, there is a status bar showing '1/80', 'Search All', and 'Online'. A red box labeled '1' encompasses the toolbar area containing various icons. At the very bottom, a menu bar contains the items 'File Edit View Session Records', which is highlighted with a red box labeled '2'.</p>	Field Name	Value	Item	0-0031	Desc	Elbow, Street- 1-1/8 ...	LD?		Storeroom	CENTRAL	Bin	D-9-4
Field Name	Value												
Item	0-0031												
Desc	Elbow, Street- 1-1/8 ...												
LD?													
Storeroom	CENTRAL												
Bin	D-9-4												

Toolbar Buttons

The user interface of the DataSplice Remote Client has numerous components. One of these components is the toolbar, which is composed of a series of buttons. The following is a brief explanation of these toolbar buttons.

Show View List	
	This button displays the list of views available to the user. Changes made to the view display or records while in a view are not affected by navigating to the view list. For example, a user has set a view to sort in descending order and then navigates off the view. When the user returns to the view, the sort will appear as the user left it.
Toggle Display	
	This button switches the view between grid display and vertical display for the current view. Grid mode displays <i>multiple</i> records at one time. Records are displayed horizontally, one record per line. Grid mode is especially useful while searching through records. Vertical mode displays <i>one</i> record at a time. Field names are displayed in a column on the left side of the screen. The corresponding values are displayed on the right. Vertical mode is optimal for editing records.
Back	
	This button navigates the user through previous views. This is similar to using the Back button in a web browser.
Next	
	This button displays the next record(s). When in vertical display mode, tapping this button will take you to the next record in the current set. When in grid display mode, tapping this button will show you the next <i>set of records</i> .
Previous	
	This button displays the previous record(s). When in vertical display mode, tapping this button will take you to the previous record in the current set. When in grid display mode, tapping this button will show you the previous <i>set of records</i> .

New Record



This button creates a new record in the designated view. The new record may be blank, may have some fields populated with default values, or may have all values from an originating record duplicated.

Delete Record



This button removes the selected record *permanently*. **Note:** Items deleted are not sent to the Recycle Bin, and the **Delete** command cannot be reversed.

Commit Changes



This button saves all record modifications. Records are committed in the order in which they are modified. To view the list of modifications, select **Modification History** from the **View** menu.

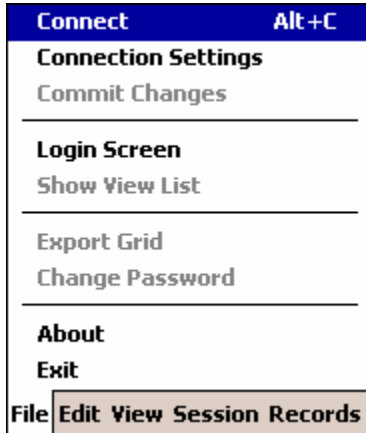
Search

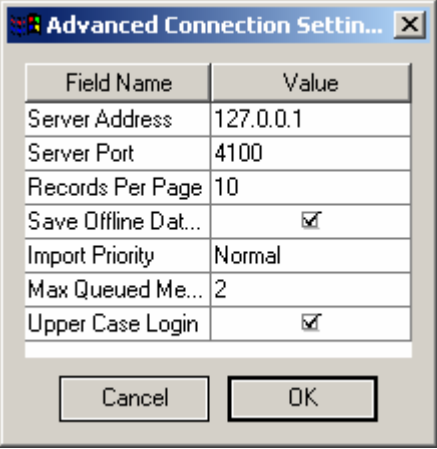


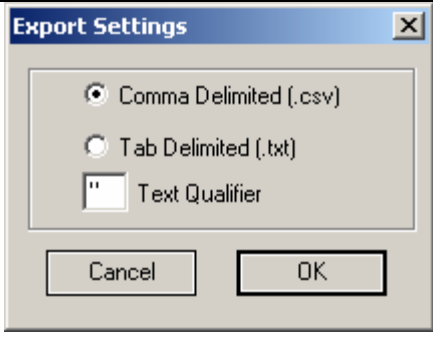
This button retrieves specified records. Filter fields define the criteria upon which the records will be searched.

Menus

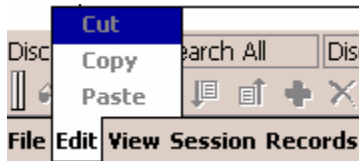
File Menu



<p>Connect</p>	<p>Tapping on this menu item connects the Remote Client to the DataSplice Server. When connected, this menu item changes to Disconnect, at which time tapping it will <i>disconnect</i> the Remote Client from the DataSplice Server.</p>
<p>Connection Settings</p>	<p>Tapping this item opens the Advanced Connection Settings dialog box:</p>  <p>This area specifies the address of the DataSplice Server, along with other properties like the number of records to view per page.</p>
<p>Commit Changes</p>	<p>Tapping this menu item saves all record modifications. Records are committed in the order in which they are modified. To view the list of modifications, select Modification History from the View menu.</p>
<p>Login Screen</p>	<p>Tapping this selection opens the Login screen. This action does not affect the connection status.</p>
<p>Show View List</p>	<p>Tapping this option opens the list of views available to the user logged in. The view list displayed is based on the class of the most recent view. To view another view class or all available views, select the appropriate option from the Select View dropdown box.</p>
<p>Export Grid</p>	<p>Tapping this item opens the Export Settings dialog box:</p>

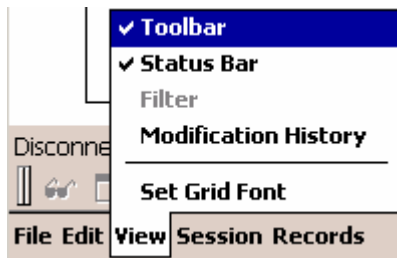
	 <p>Exporting a grid sends all visible information from the current view to an external file.</p>
<p>Change Password</p>	<p>This opens the Change Password dialog box. DataSplice users can change their passwords at any time. Additionally, some users may be required to change their password by the DataSplice Administrator. Contact the DataSplice Administrator if your password is lost or compromised.</p>
<p>About</p>	<p>This opens the About DataSplice dialog box. This box contains read-only information about the current version of the Remote Client application.</p>
<p>Exit</p>	<p>This closes the DataSplice Remote Client application. If the Save Offline Data to Disk option is selected and the user has an offline session, record modifications will be cached. The user is asked to commit data upon disconnect and reconnect.</p>

Edit Menu



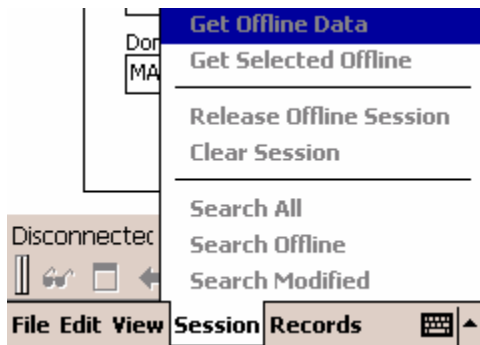
<p>Cut</p>	<p>The Cut command places the selected data into the clipboard and deletes it from its current position. Copying, cutting and pasting information reduces the likelihood of data entry errors and keeps information in the same format. Some underlying databases are case-sensitive, which means that filtering on <i>Joe Smith</i> will provide a different set of records than filtering on <i>JOE SMITH</i>.</p>
<p>Copy</p>	<p>The Copy command places the selected data into the clipboard without affecting the data itself.</p>
<p>Paste</p>	<p>The Paste command places information currently in the clipboard into the selected field.</p>

View Menu



Toolbar	When checked, the Toolbar is visible.
Status Bar	When checked, the Status Bar is visible.
Filter	When checked, the Filter fields are visible. This option will appear grayed out for users who have had this option removed by an Administrator with the <i>DS_NO_FILTER</i> attribute.
Modification History	Modification History displays all record modifications in the order in which they were completed.
Set Grid Font	Changes the type size of the characters within the data grid. You may choose from any fonts installed on your Windows platform.

Session Menu



Get Offline Data	Retrieve records marked as Offline . A green circle indicates the records that are available offline. This circle is viewable in both online and offline mode. View definitions determine which records are marked as Offline by default. The user can select which offline views they wish to download by checking the box next to the view in the Offline Views dialog. This allows static views, views that don't change, to be skipped, which reduces the time it takes to download offline data.
Get Selected Offline	Add records that are not marked as Offline records to the set of records available offline.
Release Offline Session	This return offline license to the license pool. After an offline session is released, the session becomes online-only until new offline records are retrieved.
Clear Session	This clears the current session.
Search All	The Search All option queries all the records that have been committed to the database. This option is only available while online. Uncommitted modifications will not be reflected in the query. Therefore, to avoid inaccurate searches, it is a good idea to commit all changes before searching.
Search Offline	The Search Offline option queries local records that have been marked as <i>Offline</i> records.
Search Modified	The Search Modified option queries only local records which have uncommitted modifications.

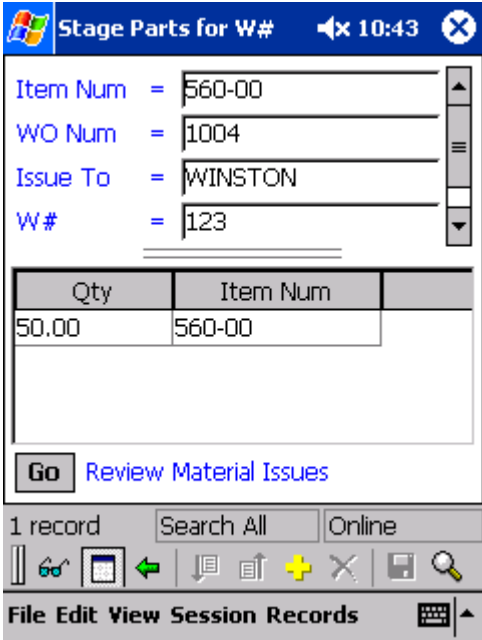
Records Menu



Narrow Search	Adds the currently highlighted field to the filter.
Clear Screen	The Clear Screen command resets the filter to the default criteria and clears any displayed records.
Reset Record Changes	The Reset Changes command reverts the record to the last committed version.
Apply Record Changes	The Apply Record Changes command commits changes to the selected record only.
Delete Record	The Delete Record command deletes an entire record from the database.
New Record	The New Record command creates a new blank record. Fields with default values will be auto-populated.
Edit Complex Filter	Opens the filter in grid mode. Conditions inserted in the same column are run with the <i>AND</i> operator. Different columns are concatenated together in the filter using an <i>OR</i> condition.

Navigation

On certain views, it may be possible to navigate to other views which have a special relationship to the one you are currently looking at. In such instances, you can use the navigation links towards the bottom of the window to move to that other related view.

Navigation	
	<p>To navigate to the associated view for the current record:</p> <ol style="list-style-type: none"> 1. Tap the navigation menu. It is displayed in blue next to the Go button. 2. From the navigation links, select the work process of interest, such as Review Material Issues. 3. Tap the Go button. This will navigate you to the selected screen, such as Review Staged Parts, and automatically filter the record selection based on the record you are navigating from.

Filters

As you are looking at views in the DataSplice Remote Client, you may want to search for particular items in the view that meet specific criteria. The filter field determines the criteria used to retrieve records from the database. The records returned from the query will have the same value in the specified field.

Filter Operators

Filter operators allow you to choose how you would like to compare the field in question and the value of that field you want to find.

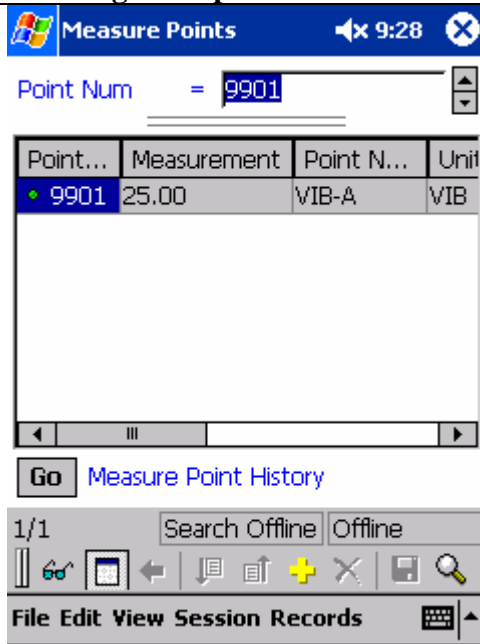
=	Equal to
<	Less than
>	Greater than
<=	Less than or equal to
>=	Greater than or equal to
<>	Not equal to
IS NULL	Returns values which are null
IS NOT NULL	Returns values which are not null

Wildcards


A wildcard is a placeholder for characters that do not have to be specified. Wildcards can be used in the filter field. For example, the records for all employees whose employee numbers begin with 27 can be retrieved by using a wildcard. In this case, the filter field would be **Employee Number**, and the value in the field would be 27%. The percent sign indicates that anything can follow the 27. In this particular case, all of the following numbers could be returned: 27, 270, and 27462983.

Simple Filters

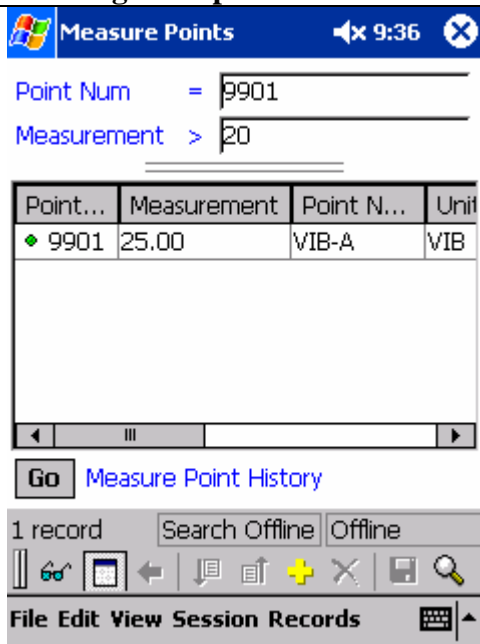
Creating a Simple Filter




To create a simple filter:

1. Tap the blue filter field. A dropdown box will appear.
2. From the dropdown list, choose the field you would like to search on, such as **Point Num**.
3. Tap on the blue “=” character to choose which operator you would like to use. For more information, please see the **Filter Operators** section above.
4. In the text field, enter the value you would like to find.
5. Tap the **Search** button  to retrieve the records.

Creating Multiple Filters



To create multiple filters:

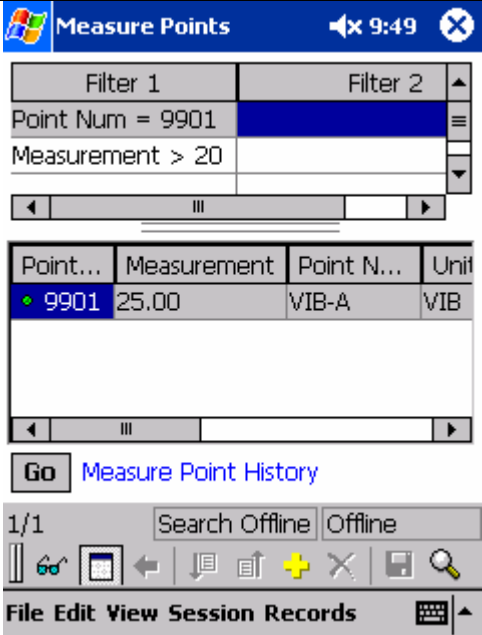
1. Tap the blue filter field. A dropdown box will appear.
2. From the dropdown list, choose **Add New Field**. Another filter field will appear below the original one.
3. Tap the new filter field. The same dropdown box will appear. From the dropdown list, select the field of interest.
4. Tap on the blue “=” character next to each filter field to choose which operator you would like to use for each of the filter fields. For more information, please see the **Filter Operators** section above.
5. In the text fields, enter values to search on for both filter fields.
6. Tap the **Search** button  to retrieve the records.

Complex Filters

Complex filters are more powerful than simple filters because they can be combined to further refine the data displayed.

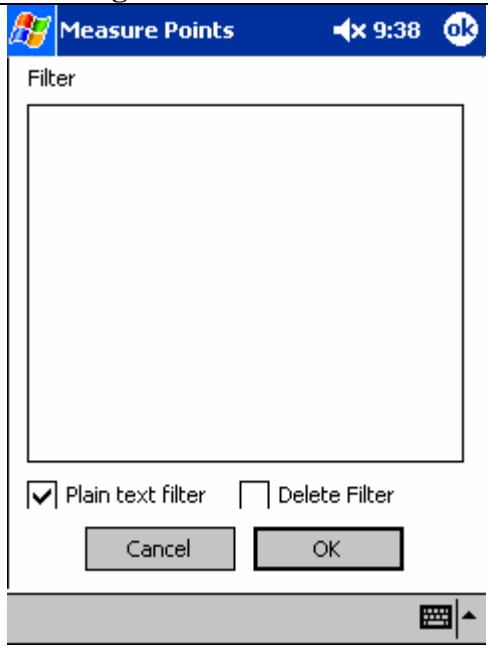
Filters in the same *column* are joined with an *AND* operation. The records retrieved must meet all of the conditions of *all of the filters* in that row.

Filters in the same *row* are joined by an *OR* operation. The records retrieved must meet all of the conditions of *at least one of the filters*.

Creating Complex Filters	
	<p>To create a complex filter:</p> <ol style="list-style-type: none"> 1. From the Records menu at the bottom of the screen, choose Edit Complex Filter. This will change the filter area to two columns, titled Filter 1 and Filter 2. 2. Double tap in a field to create a filter. You will be shown a screen with value fields for Display Name, Test, and Value. 3. Fill in the Display Name, Test, and Value fields as desired. The Display Name and Test fields are both dropdown lists. 4. Tap OK. 5. The new filter will now appear in the filter grid.

Advanced Filters

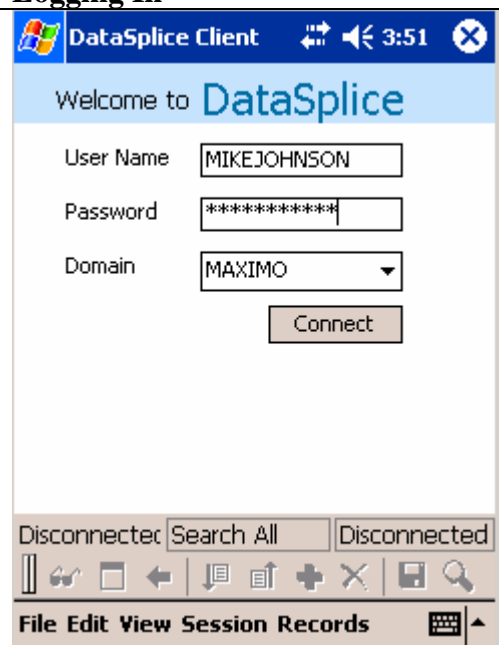
The basic filtering technique (selecting field, test, and value) works for most situations and is preferred because it ensures correct syntax in the query statements. More advanced filters may be created by checking the **Plain Text Filter** box on the **Edit Filter Item** dialog box and entering a custom SQL statement. This provides the opportunity to create unique filters based on the syntax of the particular database view by inputting text that will be inserted into the *where* clause without modification.

Creating Advanced Filters	
	<p>To create an advanced filter:</p> <ol style="list-style-type: none"> 1. From the menu at the bottom of the screen, tap Records > Edit Complex Filter. This will change the filter area to two columns, titled Filter 1 and Filter 2. 2. Double tap in a field to create a filter. You will be shown a screen with value fields for Display Name, Test, and Value. 3. Select the Plain text filter checkbox at the bottom of the screen. This will change the screen into a large text area. 4. Type your custom filter into the text area. 5. Tap OK. 6. The new filter will now appear in the filter grid.

Beginning a Session

When you start the DataSplice Remote Client application, you will first be prompted to log in and begin your session. DataSplice can function in two different modes – *online* and *offline*. The process of beginning a session is slightly different, depending on which mode you are going to use.

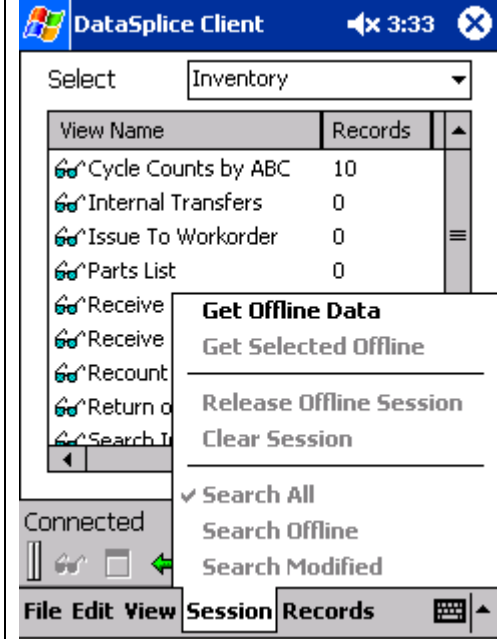
Logging In

Logging In	
	<p>The first screen you will see when starting the DataSplice Remote Client is the login screen. To log in, enter your user name and password in the corresponding fields. Select your correct domain from the Domain dropdown list. If the domain you are looking for does not appear in the list, open the virtual keypad and enter it into the domain text field using the stylus. After your login information has been entered, tap the Connect button.</p> <p>Note: Please keep in mind that all user name, password, and domain information in DataSplice is case-sensitive.</p>

Once you have successfully logged in, you will be taken to the list of views. If you are going to use DataSplice in *online* mode, you can continue on to using the views. For an explanation of the views, please refer to the **Views** section later in this document. If you are going to use DataSplice in *offline* mode, you will first need to obtain an offline session. Please refer to the following **Obtaining an Offline Session** section for more information.

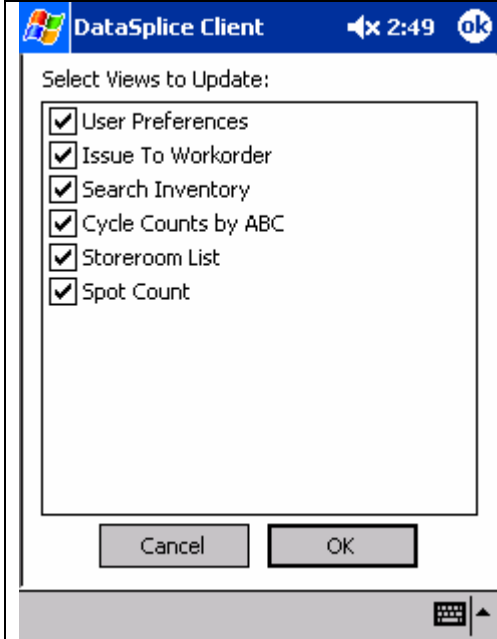
Obtaining an Offline Session

If you wish to use DataSplice in offline mode, you must first obtain an offline session after you have logged in. This process caches the necessary offline data directly onto the handheld device. This allows you to use the device in the same way that you would if you were in a normal online session. The difference is that DataSplice will use and update the data that is actually stored on the handheld device, since an actual connection to the DataSplice Server is not possible without connectivity.

Getting Offline Data


To get offline data, tap **Session > Get Offline Data**.

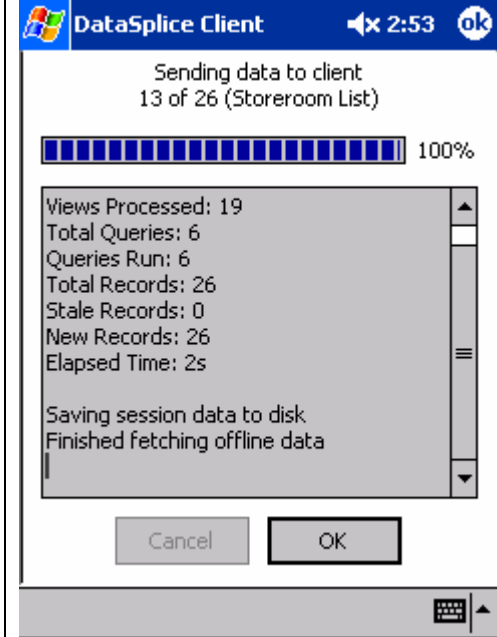
This tells the DataSplice Server that you want to take your data from the Server and copy it to the handheld device so you can work offline.

Selecting the Views to Download


You will be shown a list of views. Place a check mark beside each view for which you would like to download data to the handheld device. By default, all of the views should be checked.

Tap **OK** to continue.

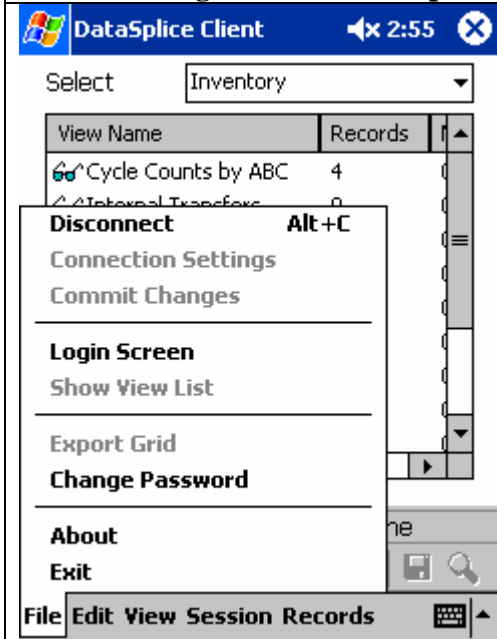
Downloading Offline Data



Based on your login name, the DataSplice Server will determine all of the necessary data to download to the handheld device.

When the download is complete, the screen will display summary information about the data received. To continue, tap **OK**.

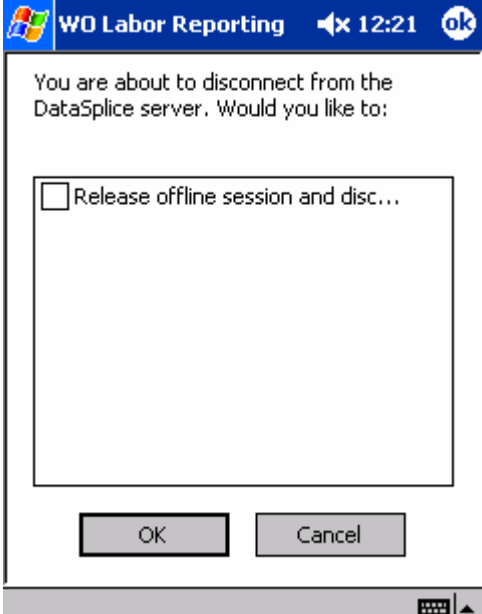
Disconnecting from the DataSplice Server



Now that the necessary data has been cached on the handheld device, you can disconnect from the DataSplice Server and go offline.

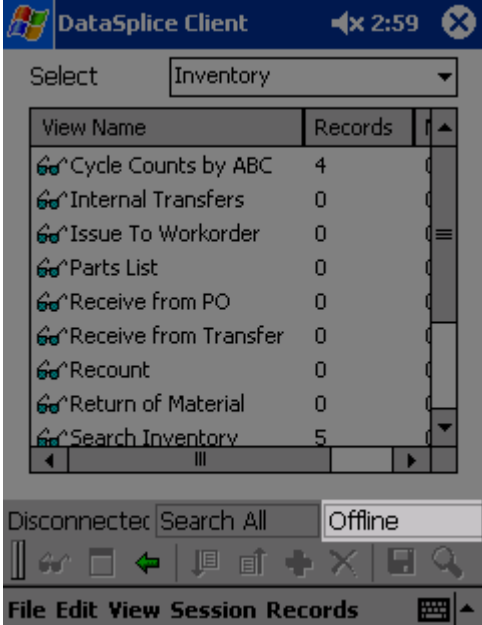
To disconnect from the DataSplice Server, tap **File > Disconnect**.

Disconnecting from the DataSplice Server (cont'd)



You will see a checkbox to **Release offline session and disconnect**. Leave this box *unchecked* and tap **OK** to continue.

Successfully Obtained an Offline Session



You have now successfully obtained an offline session and are working in offline mode. You can easily tell which mode you are in by referring to the far right section of the status bar. This should now say *Offline*.

Once you have successfully obtained an offline session, the data is cached on the handheld device, allowing you to perform the desired tasks in offline mode. Notice that the far right section of the status bar now says *Offline*. This indicates that you are now in offline mode. Another aspect to note is that offline data appears on the handheld with a green dot on the left of each record. This signifies that the record data you are viewing is actually stored on the handheld.

Completing a Session

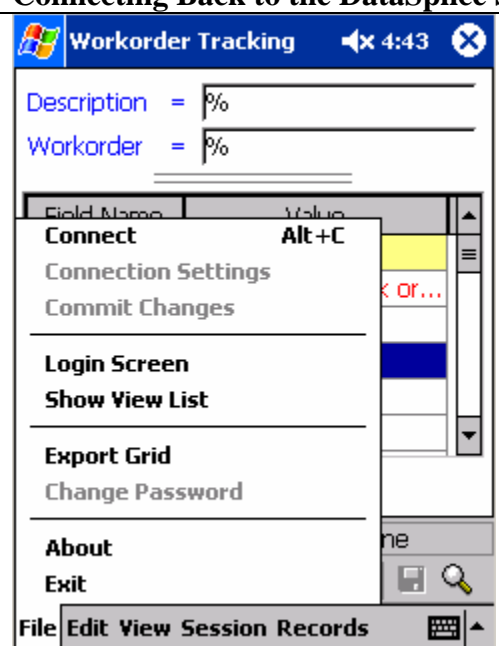
After you have performed all of the desired tasks in the DataSplice Remote Client, you will want to end your session. This process frees up the license you were using, and ensures that all of the changes you have made throughout your session have been successfully updated in the DataSplice Server. The process of completing a session differs depending on whether you are working in an *online* or an *offline* session.

Completing an Online Session

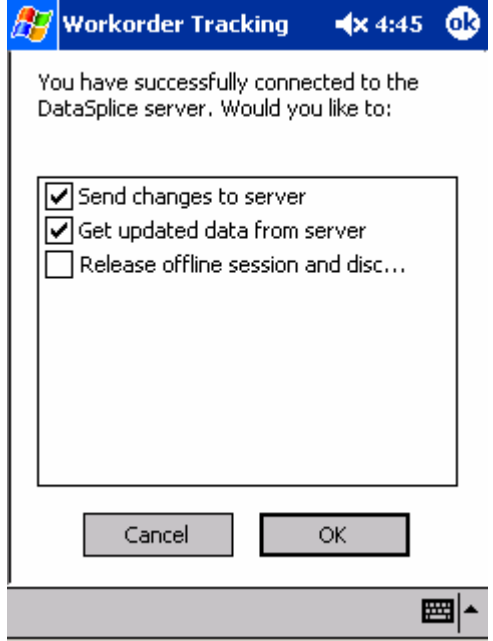
To complete a session when you are working online, the process is very simple. This is due to the fact that record modifications are synchronized with the DataSplice Server in real-time, since you are working *online*. To complete an online session, simply tap **File > Disconnect**. When you return to the login screen, your session and license have successfully been released.

Completing an Offline Session

The process of completing an offline session is slightly more involved. It is important to remember that, during an offline session, all of the modifications you have made are stored on the handheld, not on the DataSplice Server. To successfully complete the session, you need to reconnect and synchronize your modifications with the DataSplice Server.

Connecting Back to the DataSplice Server	
 <p>The screenshot shows the 'Workorder Tracking' application interface. At the top, there are two input fields: 'Description = %' and 'Workorder = %'. Below these is a table with columns 'Field Name' and 'Value'. A 'File' menu is open, listing several options: 'Connect' (with a keyboard shortcut 'Alt+C'), 'Connection Settings', 'Commit Changes', 'Login Screen', 'Show View List', 'Export Grid', 'Change Password', 'About', and 'Exit'. The 'Connect' option is highlighted in yellow. At the bottom of the screen, a navigation bar contains 'File', 'Edit', 'View', 'Session Records', and a keyboard icon.</p>	<p>When you are ready to connect back up with the DataSplice Server to synchronize your changes, tap the File menu and select the Connect menu option.</p> <p>Note: The handheld device must have a TCP/IP network connection to be able to communicate with the server, i.e. through the cradle using an Ethernet cable or ActiveSync (PC) connection, or a wireless network connection, etc.</p>

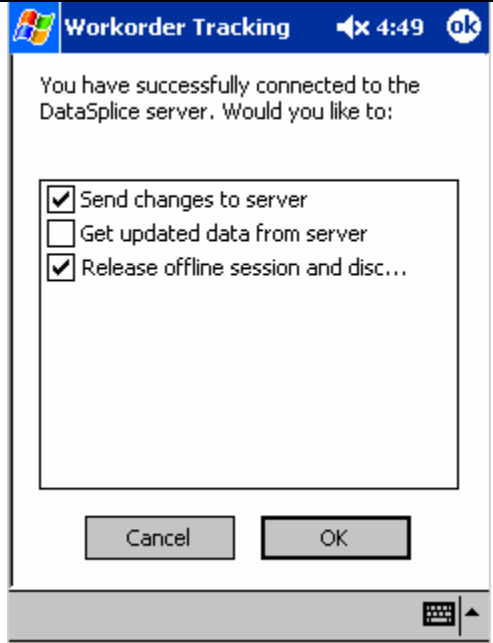
Synchronizing Data and Continuing to Work Offline



When you want to synchronize your record modifications and then continue to perform additional work offline, select the following options:

1. Check **Send changes to server**
2. Check **Get updated data from server**. The **Release offline session and disconnect** box will automatically be unchecked.
3. Tap the **OK** button

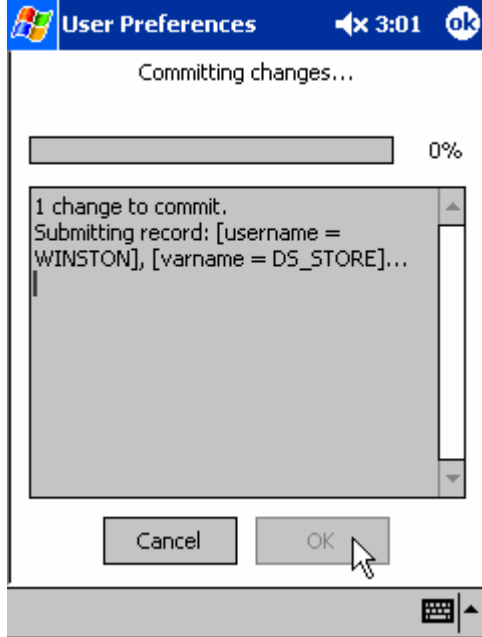
Synchronizing Data and Releasing Your Offline Session



To synchronize your data when you are finished working:

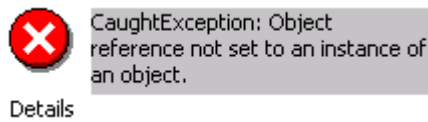
1. Check **Send changes to server**
2. Check **Release offline session and disconnect**. The **Get updated data from server** box will automatically be unchecked.
3. Tap the **OK** button.

Uploading and Committing Changes




After tapping the **OK** button from the previous screen, DataSplice begins the process of synchronizing your modifications on the handheld device with the DataSplice Server. If you selected **Get updated data from server**, then after the synchronization is complete, you will be returned to the view to continue working. If you selected **Release offline session and disconnect**, you will be taken to the login screen.

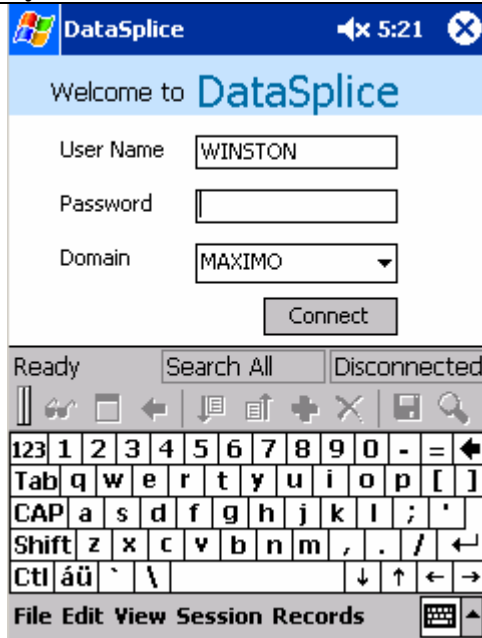
Note: If there is a problem with one of the record changes you are trying to upload, you will receive an error:



Tap **OK** to close the error dialog box. You will be taken directly to the record that caused the error, where you can fix the problem. Once you have corrected the problem, tap the **Commit**

Changes button  and you will be taken back to the screen where your data is being uploaded to the server.

Synchronization Finished

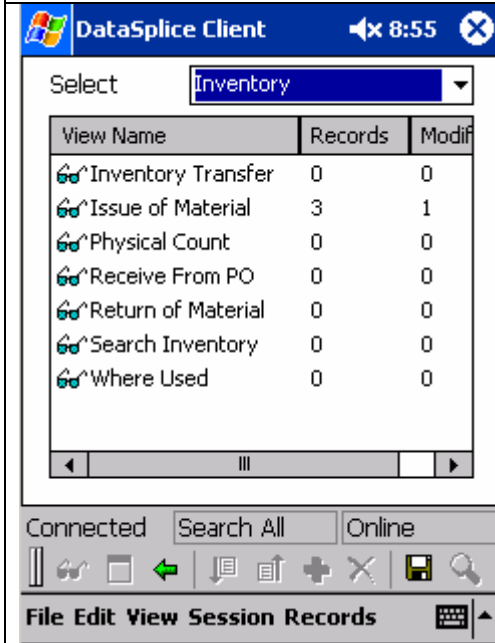



If you selected **Release offline session and disconnect**, then after the synchronization is complete, the Remote Client will release its offline session and license, and return to the login screen. The handheld device is now ready to be used by a different user.

Views

After you have successfully logged in and begun your session, you will be presented with the view list.

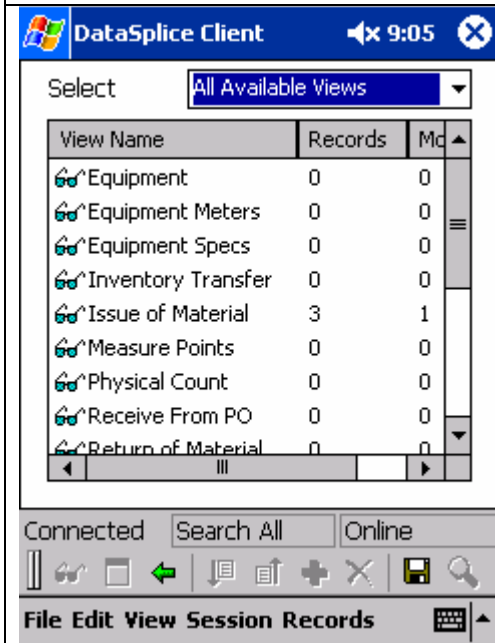
View List



The initial view list will only include a few views. To access a particular view, tap on the view name with your stylus. To return to the view list screen, tap the **Show View List** button .

To perform some functions, you may need to change the view list to display all available views. See the next table titled **All Available Views** for more information.

All Available Views



While this manual concentrates on only those views that are directly related to inventory, you may, at any time, see a list of all available views. To do this, simply tap the **Select** drop-down list and select **All Available Views** from the list. The DataSplice Remote Client will then show you a listing of all of the available views that you may choose from.

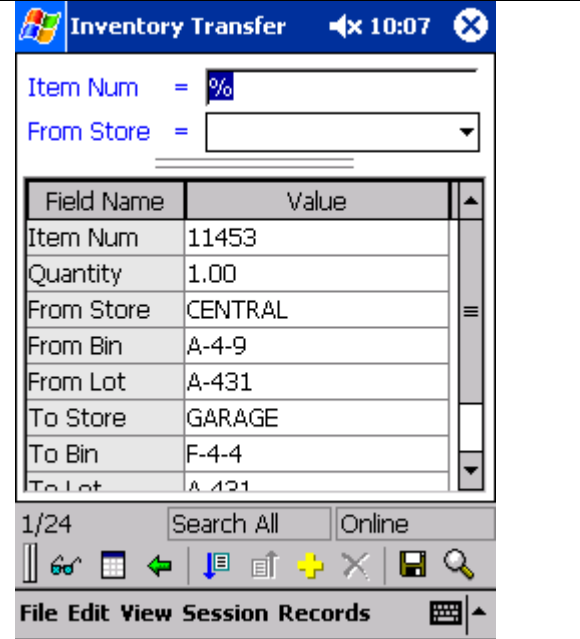


For more information on the other available views not discussed in this manual, please refer to the other user manuals for those modules.

Inventory Transfer

To get to the **Inventory Transfer** screen, you can tap its name from the main view list. You may also get to it by selecting the **Transfer Selected Item** link from the navigation menu at the bottom of the client window, and then tapping **Go**:

Go [Transfer Selected Item](#)

Items can be transferred between locations by creating a transfer record. The record contains an item number, quantity to be moved, original location, and final destination. This record is then automatically used by DataSplice to adjust the inventory balances at both locations.

Inventory Transfer																			
 <p>The screenshot shows the 'Inventory Transfer' screen. At the top, there's a title bar with 'Inventory Transfer' and a clock showing '10:07'. Below the title bar, there are two input fields: 'Item Num' with a filter icon and a dropdown arrow, and 'From Store' with a dropdown arrow. Below these is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Field Name</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Item Num</td> <td>11453</td> </tr> <tr> <td>Quantity</td> <td>1.00</td> </tr> <tr> <td>From Store</td> <td>CENTRAL</td> </tr> <tr> <td>From Bin</td> <td>A-4-9</td> </tr> <tr> <td>From Lot</td> <td>A-431</td> </tr> <tr> <td>To Store</td> <td>GARAGE</td> </tr> <tr> <td>To Bin</td> <td>F-4-4</td> </tr> <tr> <td>To Lot</td> <td>A-431</td> </tr> </tbody> </table> <p>At the bottom of the screen, there's a navigation bar with icons for 'File', 'Edit', 'View', 'Session Records', and a keyboard icon. The text '1/24 Search All Online' is also visible.</p>	Field Name	Value	Item Num	11453	Quantity	1.00	From Store	CENTRAL	From Bin	A-4-9	From Lot	A-431	To Store	GARAGE	To Bin	F-4-4	To Lot	A-431	<p>To transfer inventory items:</p> <ol style="list-style-type: none"> 1. In the filter field at the top, enter the Item Num to transfer. 2. Tap the New Record button . 3. Many of the fields will be automatically filled in with default values. Complete the remaining fields accordingly, such as the quantity to transfer in the Quantity field. 4. When you have completed the fields, tap the Commit Changes button  to save the record and complete the transfer.
Field Name	Value																		
Item Num	11453																		
Quantity	1.00																		
From Store	CENTRAL																		
From Bin	A-4-9																		
From Lot	A-431																		
To Store	GARAGE																		
To Bin	F-4-4																		
To Lot	A-431																		

Fields

The **Inventory Transfer** view has multiple fields, as described below:

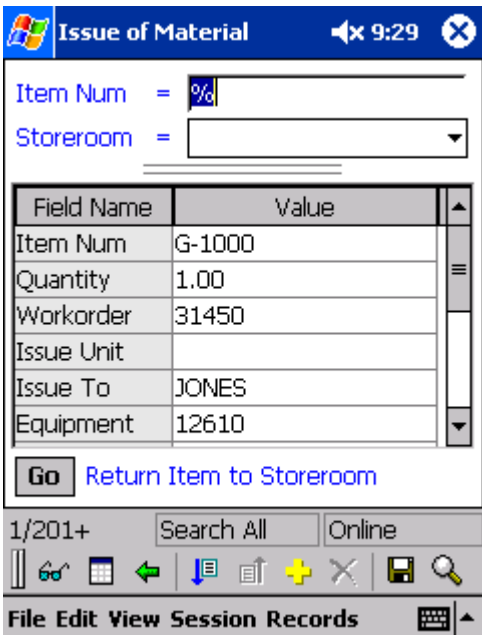


Field Name	Value
Item Num	The identification number of the item being transferred
Quantity	The quantity of the chosen item to be transferred
From Store	The store ID that the transfer is coming from
From Bin	The bin ID that the transfer is coming from
From Lot	The lot ID that the transfer is coming from
To Store	The store ID that the transfer is going to
To Bin	The bin ID that the transfer is going to
To Lot	The lot ID that the transfer is going to
Trans Date	The date and time of the transfer

Issue of Material

To get to the **Issue of Material** screen, you can tap its name from the main view list. You may also get to it by selecting the **Issue the Selected Item** link from the navigation menu at the bottom of the client window, and then tapping **Go**:

Go [Issue the Selected Item](#)

The **Issue of Material** view is used to issue material to a work order, equipment number, general ledger account, or location.

Issue of Material	
	<p>To issue material:</p> <ol style="list-style-type: none"> 1. In the filter field at the top, enter the Item Num you would like to issue. 2. Tap the New Record button . Some of the fields will be automatically populated with default values. 3. In the Quantity field, enter the quantity to issue. 4. Complete the remaining fields as desired. 5. When you have filled in the fields, tap the Commit Changes button  to complete the issue.

Fields

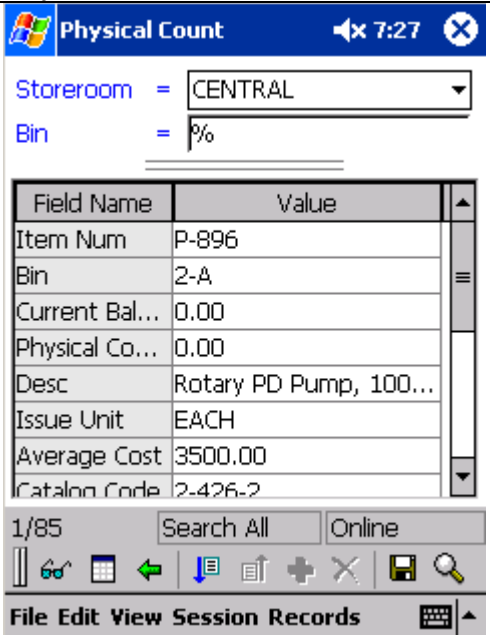
The **Issue of Material** view has multiple fields. The following is a brief description of each:

Field Name	Value
Item Num	The identification number of the item being issued
Quantity	The quantity of the chosen item to be issued
Workorder	The work order number
Issue Unit	The unit of measure of the item to be issued
Issue To	The person whom the item is issued to
Equipment	The equipment number to be issued
Location	The location of the material to be issued
GL Debit Acct	The general ledger debit account that will be affected by this transaction
Trans Date	The date of this transaction
Description	A description of the item
Storeroom	The store location of the item
Bin	The bin location of the item
Lot	The lot location of the item

Physical Count



To get to the **Physical Count** screen, you can tap its name from the main view list. This view allows you to take physical counts of items.

Physical Count



The screenshot shows the 'Physical Count' screen with a blue header bar. Below the header, there are filter fields for 'Storeroom' (set to 'CENTRAL') and 'Bin' (set to '%'). A table displays item details: Item Num (P-896), Bin (2-A), Current Bal... (0.00), Physical Co... (0.00), Desc (Rotary PD Pump, 100...), Issue Unit (EACH), Average Cost (3500.00), and Catalog Code (2-426-2). At the bottom, there are navigation icons and a status bar with 'File Edit View Session Records'.

To take a physical count:

1. In the filter fields at the top, enter criteria for the item you would like to count. You can also use wildcards, such as %, to retrieve multiple records.
2. Tap the **Search** button  to retrieve the records.
3. In the **Physical Count** field, enter the count for the item.
4. Tap the **Commit Changes** button  to save the record.

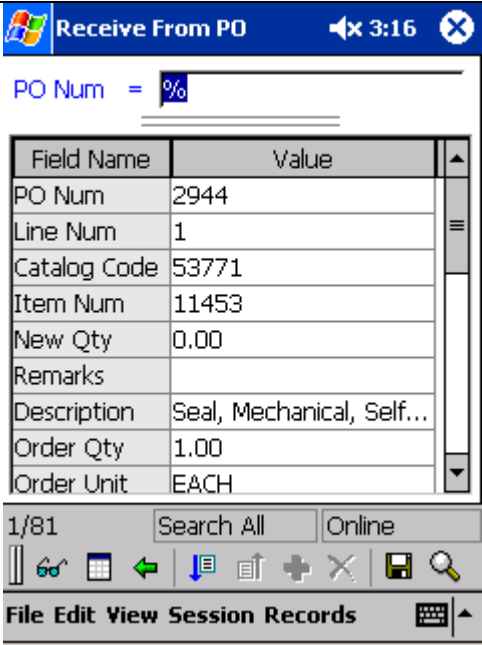



Fields

The **Physical Count** view has multiple fields. Here is a brief description of each:

Field Name	Value
Item Num	The identification number of the item being counted
Bin	The bin in which this item is located
Current Balance	The current balance of the item
Physical Count	The actual count of the item
Desc	A description of the item
Issue Unit	The unit of measure of the item
Average Cost	The average cost of the item
Catalog Code	The catalog code number of the item
Manufacturer	The manufacturer of the item
Model Num	The model number of the item
Vendor Name	The name of the item vendor
Count Date	The date and time that the count took place
Storeroom	The store location where the item resides
Min	The minimum acceptable value
Max	The maximum acceptable value
SiteID	The identifier for the site

Receive from PO

To get to the **Receive from PO** view, you can tap its name from the main view list. This view allows you to add items to inventory as they are received from a purchase order.

Receive from PO	
	
<p>To receive from a purchase order:</p> <ol style="list-style-type: none"> 1. Enter the purchase order number in the PO Num filter field. 2. Tap the Search button . The resulting records will show all of the remaining items that have yet to be received for that PO. 3. In the corresponding fields, enter the quantity being received, the bin location (if not already set to the appropriate bin), and the other optional fields. 4. When you have filled in the fields appropriately, tap the Commit Changes button  to finish the receipt. 	
<p>To reject items:</p> <ol style="list-style-type: none"> 1. Verify that the purchase order line has not been completed by examining the Complete field. A completed line cannot reject items. 2. In the Reject Qty field, enter the number of items rejected. 3. In the Reject Code field, enter the code that corresponds to the reason for rejection. 4. When you are done, tap the Commit Changes button . 	

Fields

The **Receive from PO** view has multiple fields. The following is a brief description of each:







Field Name	Value
PO Num	The purchase order identification number
Line Num	The line number of the purchase order
Catalog Code	The catalog code
Item Num	The identification number of the item
New Qty	The quantity acceptable in the delivery
Remarks	Any miscellaneous remarks
Description	A description of the item
Order Qty	The total quantity of the item ordered
Order Unit	The unit of measure of the item ordered
Received Qty	The quantity of the item actually received
Pack Slip	The pack slip
Model Num	The model number of the item
Mfg	The manufacturer of the item
Complete	This shows the status of the purchase order line (Y or N)
Storeroom	The storeroom that the item is being assigned to
Bin	The bin to which the item is assigned
Lot	The lot number of the item being received
Workorder	The number of the work order associated with the purchase order
Location	The location of the item being received
Equipment	The equipment number of the item
SiteID	The identifier for the site
POLineID	The ID for the purchase order line
Reject Qty	The quantity rejected in the delivery
Reject Code	The reason for the rejection of items

Return of Material

To get to the **Return of Material** screen, you can tap its name from the main view list. You may also get to it by selecting the **Return Item to Storeroom** link from the navigation menu at the bottom of the client window, and then tapping **Go**:

Go [Return Item to Storeroom](#)

The **Return of Material** view is used to return issued items back into inventory.

Return of Material																	
																	
Storeroom	= <input type="text"/>																
GL Credit Acct	= % <input type="text"/>																
Workorder	= <input type="text"/>																
<table border="1"> <thead> <tr> <th>Field Name</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Item Num</td> <td>11453</td> </tr> <tr> <td>Quantity</td> <td>1.00</td> </tr> <tr> <td>Storeroom</td> <td>CENTRAL</td> </tr> <tr> <td>Bin</td> <td>A-4-9</td> </tr> <tr> <td>Lot</td> <td>A-300</td> </tr> <tr> <td>Issue To</td> <td></td> </tr> <tr> <td>Workorder</td> <td>1004</td> </tr> </tbody> </table>		Field Name	Value	Item Num	11453	Quantity	1.00	Storeroom	CENTRAL	Bin	A-4-9	Lot	A-300	Issue To		Workorder	1004
Field Name	Value																
Item Num	11453																
Quantity	1.00																
Storeroom	CENTRAL																
Bin	A-4-9																
Lot	A-300																
Issue To																	
Workorder	1004																
<p>1/33 Search All Online</p> 																	
<p>File Edit View Session Records</p>																	
<p>To return issued material back into inventory:</p> <ol style="list-style-type: none"> 1. In the filter fields at the top, enter a Workorder of interest. 2. Tap the Search button  to retrieve the records. 3. To return an item from the existing list, edit the Qty Returning and Bin fields. Then tap the Commit Changes button . 4. To return an item that is not in the list, enter the item into the filter field, tap the New Record button  and enter the fields accordingly. Then tap the Commit Changes button  to complete the return. 																	

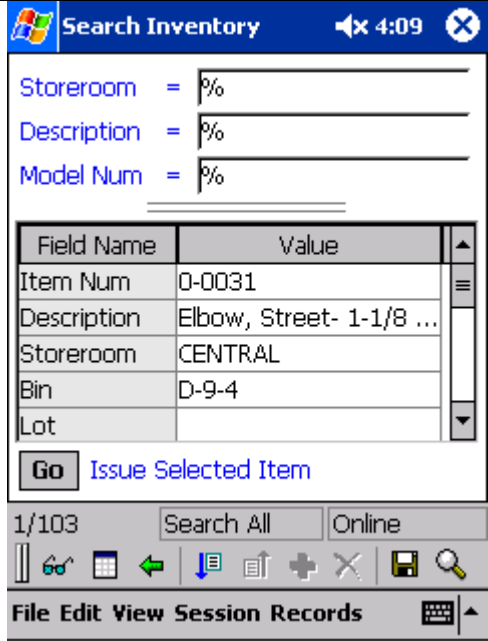

Fields

The **Return of Material** view has multiple fields. The following is a brief description of each:

Field Name	Value
Item Num	The identification number of the item being returned
Quantity	The quantity of the chosen item to be returned to inventory
Workorder	The work order number that the item being returned was originally issued to
Issue Unit	The unit of measure of the item to be returned
Issue To	The person whom the item is being returned to
Equipment	The equipment number to be returned
Location	The location of the material to be returned
GL Credit Acct	The general ledger debit account that will be credited by this item's return to inventory
Trans Date	The date of this transaction
Description	A description of the item being returned
Storeroom	The store location to return the item to
Bin	The bin location to return the item to
Lot	The lot location to return the item to

Search Inventory

Search Inventory is a read-only view that allows you to find specific items in inventory. To get to the **Search Inventory** screen, you can tap its name from the main view list.

Search Inventory	To search the inventory:
	<ol style="list-style-type: none"> 1. In the filter fields, enter the criteria you would like to search against. 2. Tap the Search button  to display the results of the search. <p>If you would like to issue an item once you have located it, you can do so by following the Issue the Selected Item navigation link. For more information about issuing an item, please refer to the Issue of Material view.</p>

Fields

The **Search Inventory** view has multiple fields. Here is a brief description of each:

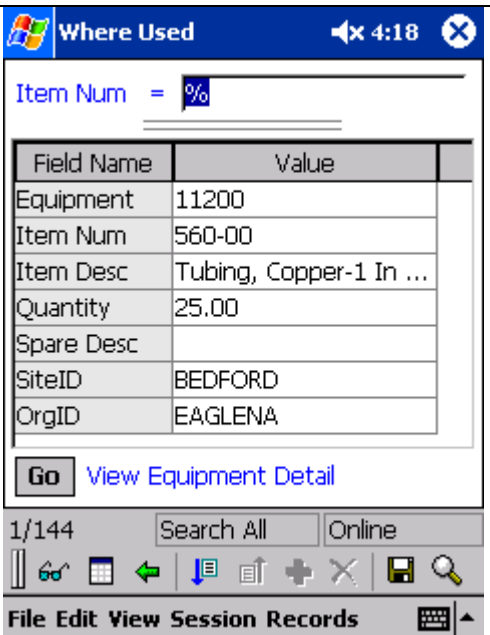

Field Name	Value
Item Num	The identification number of the item
Description	A description of the item
Storeroom	The storeroom or warehouse name
Bin	The bin number of the item
Lot	The lot number of the item
Current Balance	The current balance as reflected in bookkeeping
Category	The category of the item
Min	The minimum inventory level
Max	The maximum inventory level
Issue Unit	The unit of measure of the item
Vendor	The vendor of the item
Catalog Code	The vendor part number
Model Num	The manufacturer part number
Mfg	The manufacturer of the item
SiteID	The identifier for the site

Where Used

Where Used is a read-only view that shows you where an item is being used. To get to the **Where Used** screen, you can tap its name from the main view list. You may also get to it from the **Search Inventory** view by selecting the **Look-Up Where Used** link from the navigation menu at the bottom of the client window, and tapping **Go**:

Go [Look-Up Where Used](#)

This view shows you where the item is being used.

Where Used	
	<p>To see where an item is being used:</p> <ol style="list-style-type: none"> 1. In the filter fields, enter the criteria you would like to search against. If you arrived at this view by using the navigation link from another view, the filter field will already be filled in. 2. Tap the Search button  to display the results of the search.

Fields

The **Where Used** view has multiple fields. The following is a brief description of each:

Field Name	Value
Equipment	The equipment number
Item Num	The identification number of the item
Item Desc	A description of the item
Quantity	The quantity of the item
Spare Desc	Another description of the item
SiteID	The identifier for the site