

Go Inventory

Training Guide

July 23, 2019

Table of Contents

Navigation	3
Logging into AiM Go Inventory Management	3
Navigating Screens – Inventory Management.....	4
Pick Ticket	4
Counter Release	9
Counter Returns.....	14
Cycle Counts.....	20
More/Parts/Settings	28

Navigation

Logging into AiM Go Inventory Management

Logging into the system: <https://copdgsaimapp.assetworks.com:8443/fmax>

User Name: This field is populated with the user login.

Password: This field is populated with the password.

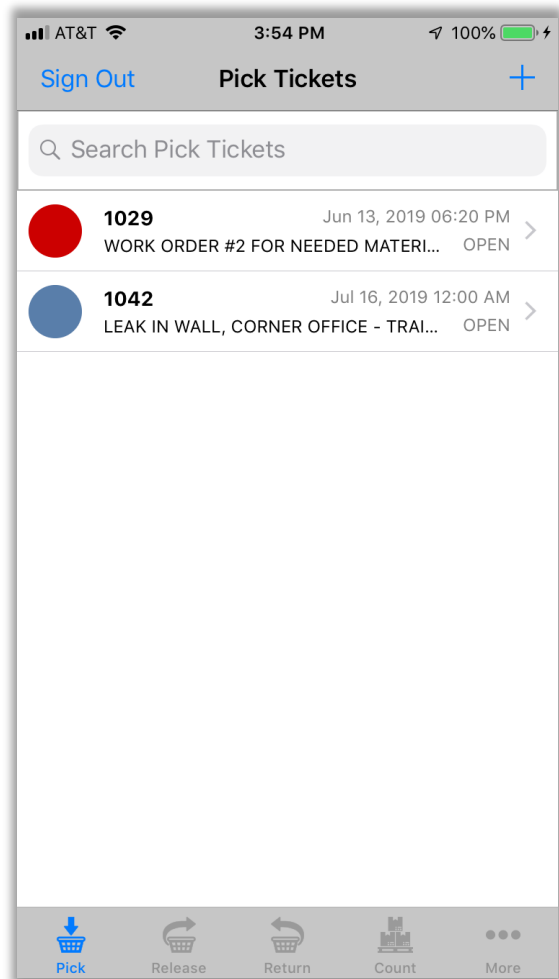
System: This field is populated with the system URL.

Login: Clicking the login button passes the user login and password information to the system.


Navigating Screens – Inventory Management

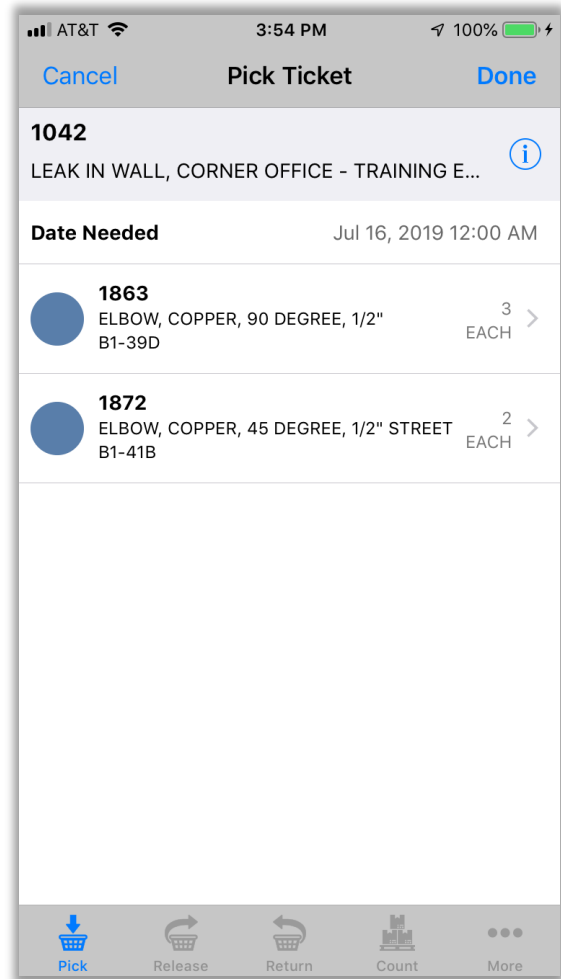
Pick Ticket

1. The app will default to the open pick tickets screen.
 - a. Clicking on a pick ticket will take you to that pick ticket.
 - b. The colors represent whether there is enough of the parts on hand to fulfill the request.
 - i. Blue – when all items have null Drawn quantities
 - ii. Green - when all items have Request quantities = Drawn quantities.
 - iii. Red – when there is any item on the Pick ticket where you are requesting a quantity greater than in-stock quantity.
 - iv. Yellow – Any other case (i.e., 1 line may have Requested 5 parts, which is less than in-stock for that part, but only 3 have been drawn).

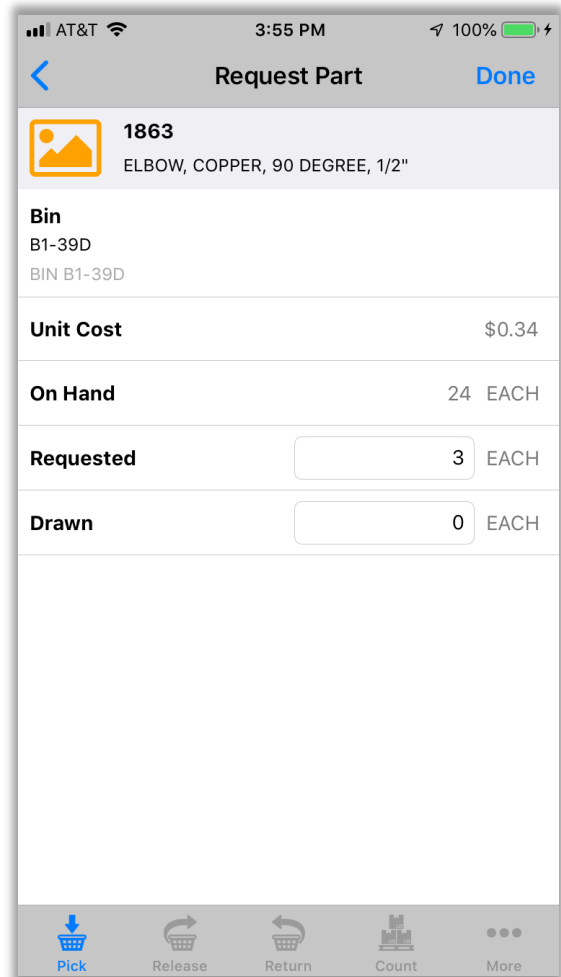


2. The pick ticket screen.

- a. Click the  button to review details about the pick ticket, such as the associated work order/phase and location of the request
- b. Click a part to go to the part request (draw) screen.
 - i. Colors indicate whether there is enough quantity on hand to fulfill the request.
- c. Clicking **Done** will prompt to submit/finalize the pick ticket.
- d. Clicking **Cancel** will return to the pick tickets screen.




3. The request part screen.
 - a. Enter the amount drawn on this screen.
 - b. Any less than the requested amount will generate a prompt later asking if you'd like to create a second pick ticket for the undrawn amounts.
 - c. Click **Done** to return to the pick ticket screen, with the drawn amount
 - d. Click < to return to the pick ticket screen without keeping the drawn amount entered
 - e. Note 1: You cannot draw more than what is currently in stock. This may require you to hold the ticket until you order more parts, only draw a partial pick ticket, or cancel the ticket (in AiM).
 - f. Note 2: you can draw more than requested, this will change the color of the pick ticket to yellow.



AT&T 3:55 PM 100%

< Request Part Done

 **1863**
ELBOW, COPPER, 90 DEGREE, 1/2"

Bin
B1-39D
BIN B1-39D

Unit Cost \$0.34

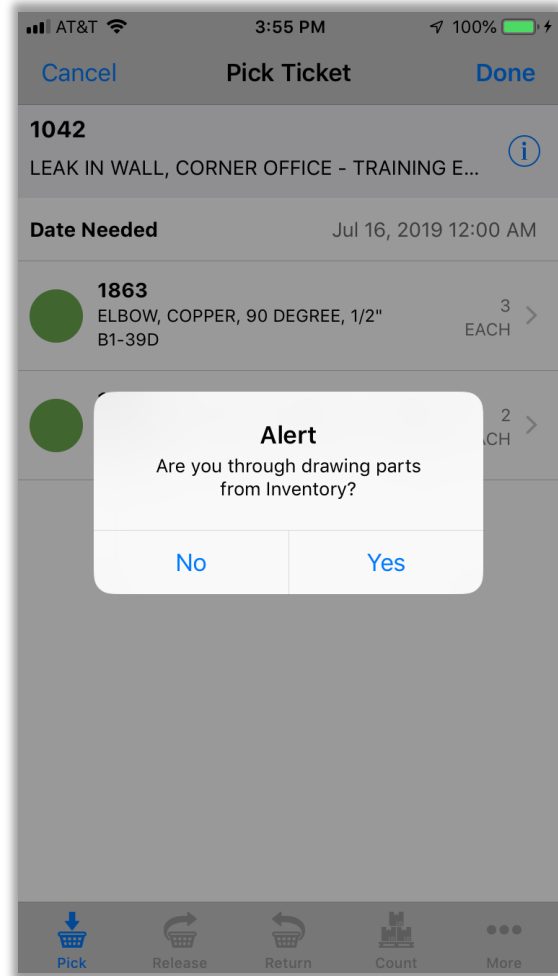
On Hand 24 EACH

Requested EACH

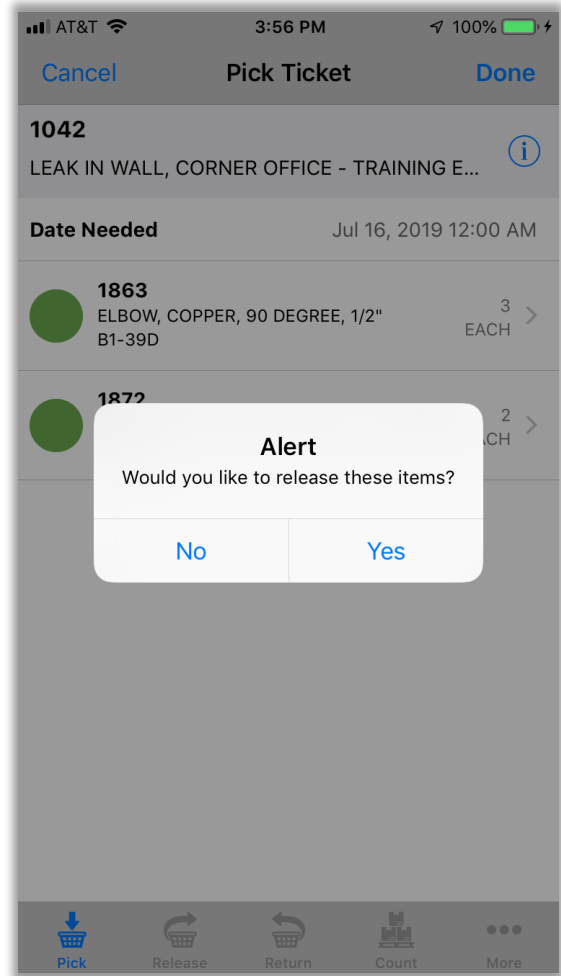
Drawn EACH

Pick Release Return Count More

4. Clicking **Done** on the pick ticket screen will prompt whether you have completed this pick ticket. Clicking yes, will change the status of the pick ticket to **"Finalized"** and ask if you are ready to generate the release to the customer.



5. The prompt asking whether you would like to generate the counter release now.



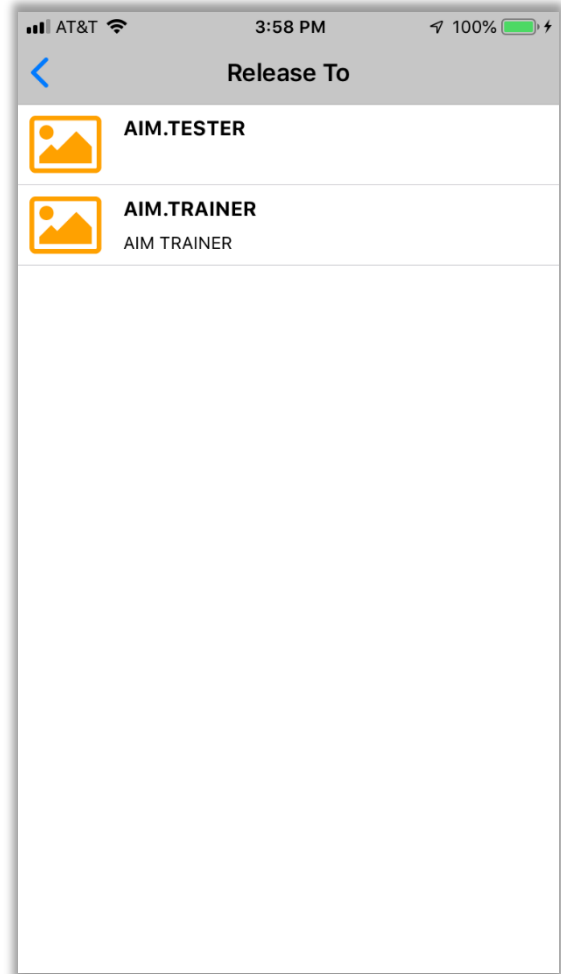
Counter Release

6. The counter release screen
 - a. Clicking the Release icon will take you to a barcode scanner/lookup screen. From here you can find the counter release.
 - b. If you asked the pick ticket to generate a counter release for you, the app will take you directly to that counter release.
 - c. On the counter release, click the released to field to take you to an employee search screen.
 - i. You may scan the employee's badge barcode or look up the employee by name/ID

The screenshot shows the 'Release Summary' screen in the AssetWorks app. The status bar at the top indicates AT&T service, 3:56 PM, and 100% battery. The screen has a 'Cancel' button on the left and a 'Done' button on the right. The main content area is divided into several sections:

- 1034**: The release ID.
- Description**: A text field containing 'LEAK IN WALL, CORNER OFFICE - TRAINING EXA...'.
- Released To**: A field with a right-pointing arrow, indicating a link to an employee search screen.
- Work Order/Phase**: A section containing the work order number '190712-117907 / 001' and the description 'LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE'.
- Pick Ticket**: A section containing the pick ticket number '1042' and the description 'LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE'.
- Parts**: A field with a right-pointing arrow.
- Photo Gallery**: A field showing '0' photos with a right-pointing arrow.

7. Select the employee that is receiving the parts.



8. Once the “Released to” is selected, you can click Done to process the release.

The screenshot shows the 'Release Summary' screen in the AssetWorks IWMS mobile app. The screen is titled 'Release Summary' and has 'Cancel' and 'Done' buttons at the top. The main content area displays the following information:

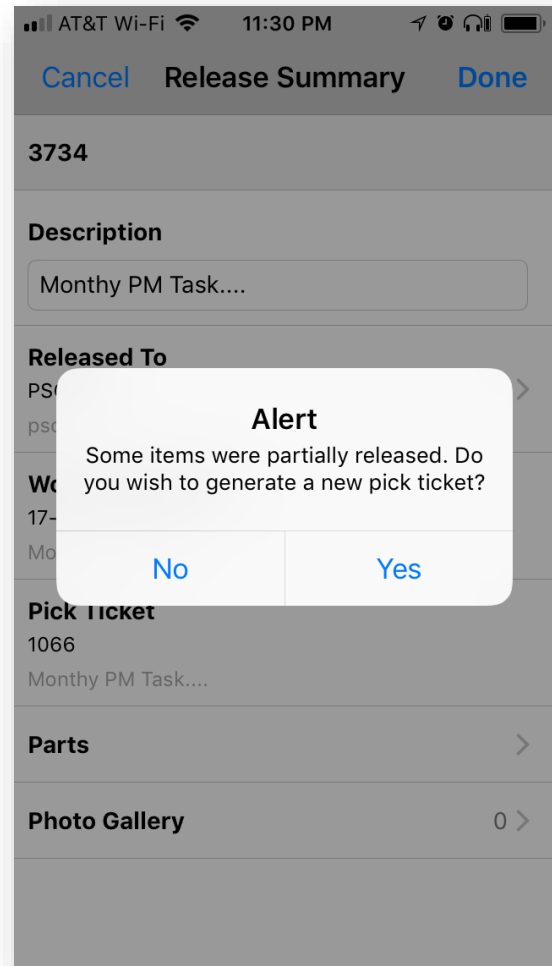
- 1034**: Item ID
- Description**: LEAK IN WALL, CORNER OFFICE - TRAINING EXA...
- Released To**: AIM.TRAINER (with a right arrow icon)
- Work Order/Phase**: 190712-117907 / 001 (with a right arrow icon)
- Pick Ticket**: 1042 (with a right arrow icon)
- Parts**: (with a right arrow icon)
- Photo Gallery**: 0 (with a right arrow icon)

9. Go Inventory 9.3 and above may then prompt you for the customer's signature. Once signed, click **Release**.

Cancel
Sign for release
Release

X
By signing above, I certify that all items have been released to me in acceptable condition.

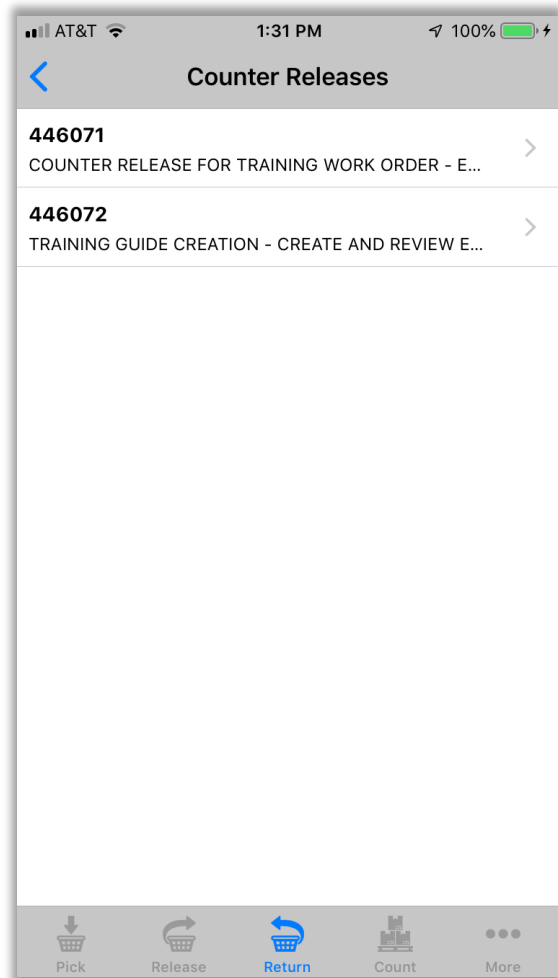
10. If the drawn parts does not match the requested parts (partial release), the app will prompt you asking whether you want to generate another pick ticket for the remaining requested parts.



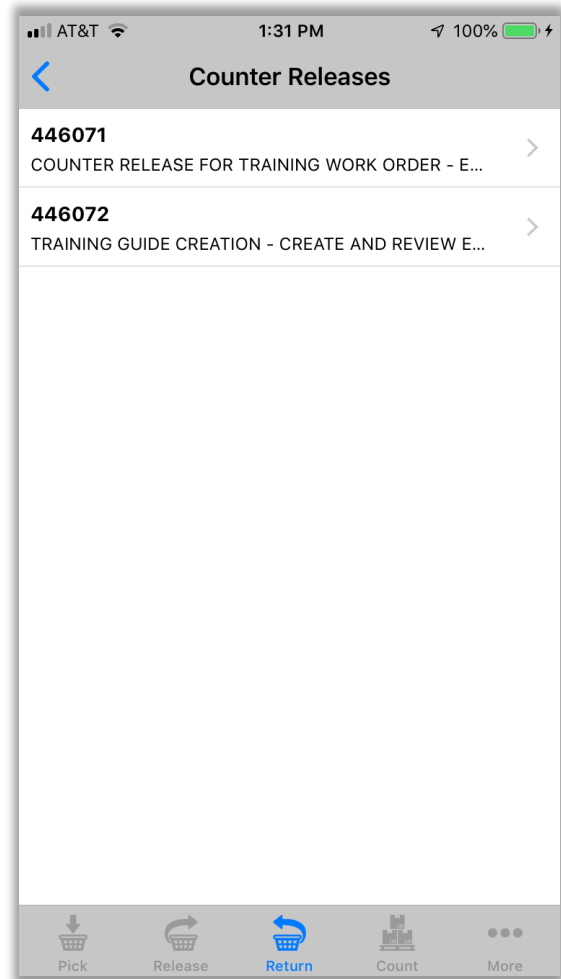
Counter Returns

11. The counter return screen

- a. Clicking on the Return icon will take you to a barcode scanner where you can scan the QR Code of the work/order phase (from Go Work Management) or search for the work order phase.
- b. Click on the phase to view all processed inventory releases for the phase.
 - i. Click counter release to search by counter release
 - ii. Click part to scan or search for counter releases related to that part



12. The processed counter releases:
 - a. Click on a counter release to view the released parts.



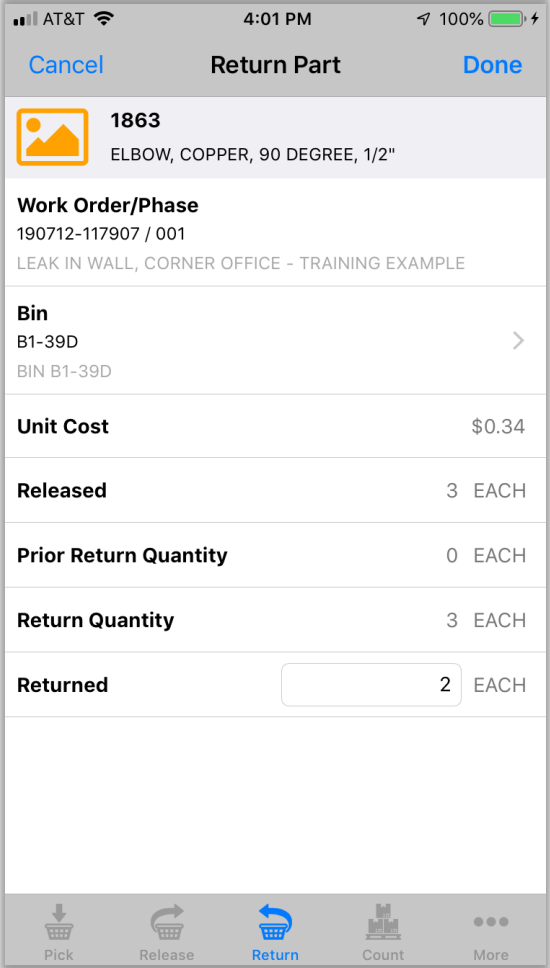
13. The return summary screen.

- a. Click Returned by to scan/search for the employee who is returning the parts. Select the employee.
- b. Click on parts to review all parts listed on the original counter release.
- c. Select a part that is being returned.

The screenshot displays the 'Return Summary' screen in the AssetWorks IWMS mobile application. At the top, the status bar shows 'AT&T', signal strength, time '4:01 PM', and battery level '100%'. The app header includes 'Cancel', 'Return Summary', and 'Done' buttons. The main content area shows the item ID '1034' and a 'Description' field containing 'LEAK IN WALL, CORNER OFFICE - TRAINING EXA...'. Below this is a 'Returned By' field with a right arrow. The 'Parts' section also has a right arrow. The 'Photo Gallery' section shows '0' photos with a right arrow. An 'Extra Description' text area is present. The bottom navigation bar features five icons: 'Pick' (down arrow), 'Release' (up arrow), 'Return' (blue up arrow), 'Count' (stack of blocks), and 'More' (three dots).


14. The parts screen:

- Enter the amount that is being **returned**.
- Click **Done** to return to the previous released parts screen, retaining the returned amount.
- Click **Cancel** to return to the previous released parts screen, without keeping the amount entered in the **returned** field.



AT&T 4:01 PM 100%

Cancel Return Part Done

 **1863**
ELBOW, COPPER, 90 DEGREE, 1/2"

Work Order/Phase
190712-117907 / 001
LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE

Bin
B1-39D
BIN B1-39D

Unit Cost \$0.34

Released 3 EACH

Prior Return Quantity 0 EACH

Return Quantity 3 EACH

Returned EACH

Pick Release Return Count More

15. Continue retuning parts on this release as needed.
 - a. Once completed, click **Done** to process the release.

The screenshot shows the 'Return Summary' screen in the AssetWorks mobile app. At the top, the status bar shows 'AT&T', signal strength, time '4:02 PM', and battery level '100%'. The app header has 'Cancel', 'Return Summary', and 'Done' buttons. The item ID '1034' is displayed. The 'Description' field contains 'LEAK IN WALL, CORNER OFFICE - TRAINING EXA...'. The 'Returned By' field shows 'AIM.TRAINER' with a right arrow and 'AIM TRAINER' below it. The 'Parts' field has a right arrow. The 'Photo Gallery' field shows '0' and a right arrow. The 'Extra Description' field is empty. At the bottom, a navigation bar includes icons for 'Pick', 'Release', 'Return' (highlighted in blue), 'Count', and 'More'.

16. 9.3 and above may prompt for the returner's signature. Once signed, click **Return**.

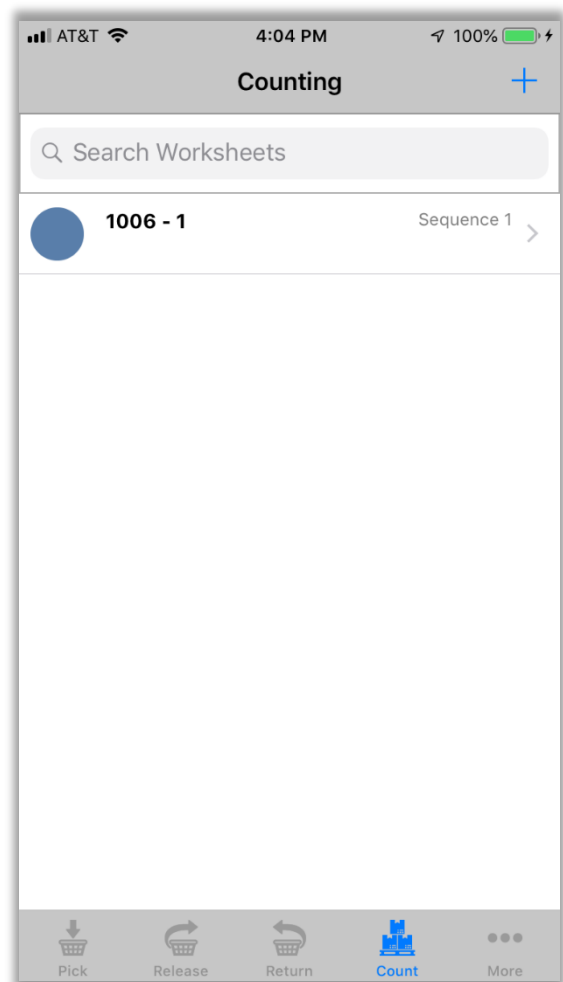
Cancel
Sign for return
Return

X
By signing above, I certify that all items have been returned to me in acceptable condition.

Cycle Counts

17. Clicking on the **Count** icon to process a physical count

- a. Note: The physical count process is initiated by running the physical count generator in AiM. Once the generator has run and produced physical count worksheets, the worksheets can be viewed and processed in Go Inventory Management.
- b. Any worksheets currently in a status of **"COUNTING"** will appear on this screen.
- c. Any worksheets that are currently in a status of **"GENERATED"** will not appear on this screen, but can be added by clicking the + icon.
- d. Note: The colors represent:
 - i. Blue: The sheet still has bins that need to be counted.
 - ii. Yellow: Some bins have been counted.
 - iii. Green: All bins have been counted and the worksheet is ready to be submitted for approval.



18. The worksheets that are currently in
"GENERATED" status
 - a. Click on the worksheet to modify its status.

The screenshot shows the 'Worksheet' screen in the AssetWorks mobile app. At the top, there are status bars for AT&T, 4:04 PM, and 100% battery. The screen has a header with 'Cancel', 'Worksheet', and 'Save' buttons. Below the header, the worksheet is titled '1007 - Set 1'. The main content area includes several sections: 'Description' with a text input field, 'Warehouse' with the value 'DGS_STOREROOM1' and a truncated address 'DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FOR...', 'Count Sequence' with the value '1', 'Status' with the value 'COUNTING' and a right arrow, 'Notes' with the value '0' and a right arrow, and 'Bins' with a right arrow. At the bottom, there is a navigation bar with icons for 'Pick', 'Release', 'Return', 'Count' (highlighted in blue), and 'More'.

19. The worksheet detail screen. Click the **Status** to change it from “**GENERATED**” to “**COUNTING**”. Then click **Save**.

The screenshot shows the 'Worksheet' detail screen for '1007 - Set 1'. The status is 'COUNTING'. The bottom navigation bar has icons for 'Pick', 'Release', 'Return', 'Count', and 'More'.

Field	Value
Description	
Warehouse	DGS_STOREROOM1 DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FOR...
Count Sequence	1
Status	COUNTING
Notes	0
Bins	

20. Back to the counting screen, the worksheet has been added. Click on a worksheet to review the worksheet summary.



21. The worksheet summary screen. Click on Bins to start the counting process.

The screenshot shows a mobile application interface for a worksheet summary. At the top, there's a status bar with 'AT&T', '4:05 PM', and '100%' battery. Below the status bar is a header with 'Cancel', 'Worksheet', and 'Done' buttons. The main content area is titled '1006 - Set 1'. It contains several sections: 'Description' with a text input field, 'Warehouse' with the text 'DGS_STOREROOM1' and 'DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FOR...', 'Count Sequence' with the value '1', 'Status' with the value 'COUNTING' and a right arrow, 'Notes' with the value '0' and a right arrow, and 'Bins' with a right arrow. The bottom of the screen features a navigation bar with five icons: 'Pick' (down arrow), 'Release' (up arrow), 'Return' (up arrow), 'Count' (blue building icon), and 'More' (three dots).

22. The Bins screen, click on a bin to count the bin.



23. The Bin Count screen.

- Enter the Item Count amount.
- Click the **Next** icon to move to the next bin to count.
- Click **Cancel** to return to the list of bins screen.

AT&T 4:06 PM 100%

Cancel Count Next

1507
TRAY, PAINT, LINER, 1 QT. CAPACITY

Scheduled Date
Jul 12, 2019

Count Date
Jul 12, 2019

Count By
AIM.TRAINER

Recount No

Item Count 5 EACH

Done

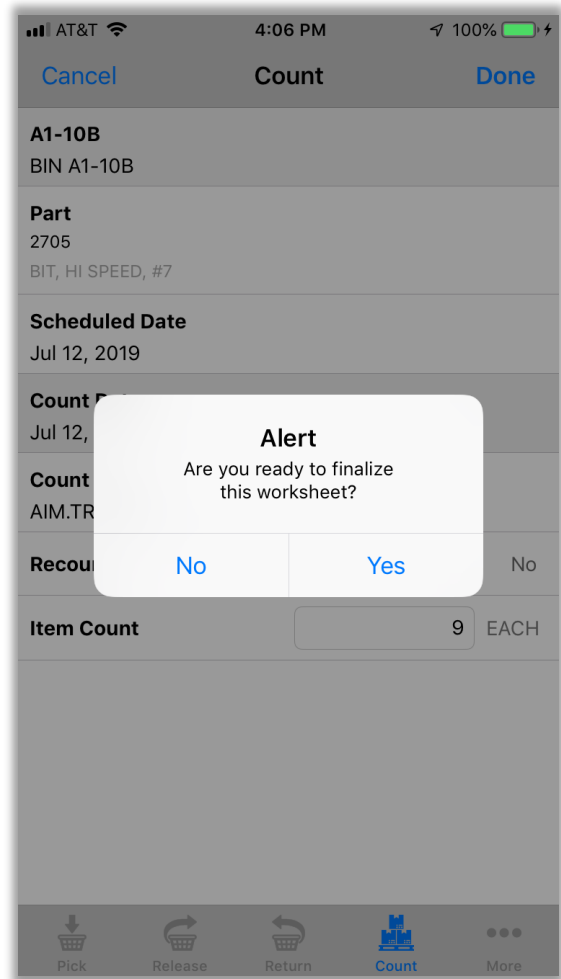
1 2 3
ABC DEF

4 5 6
GHI JKL MNO

7 8 9
PQRS TUV WXYZ

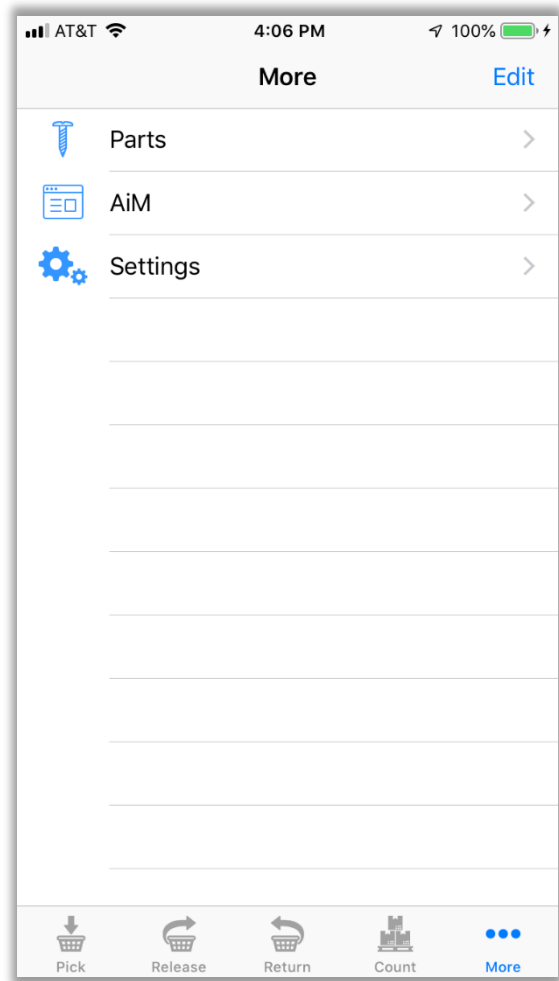
. 0

24. Once all bins have been counted, the app will prompt you whether you want to finalize the worksheet.
- Clicking **Yes** will clear the sheet from the counting screen.
 - Clicking **No** will leave it in the queue to be submitted later.

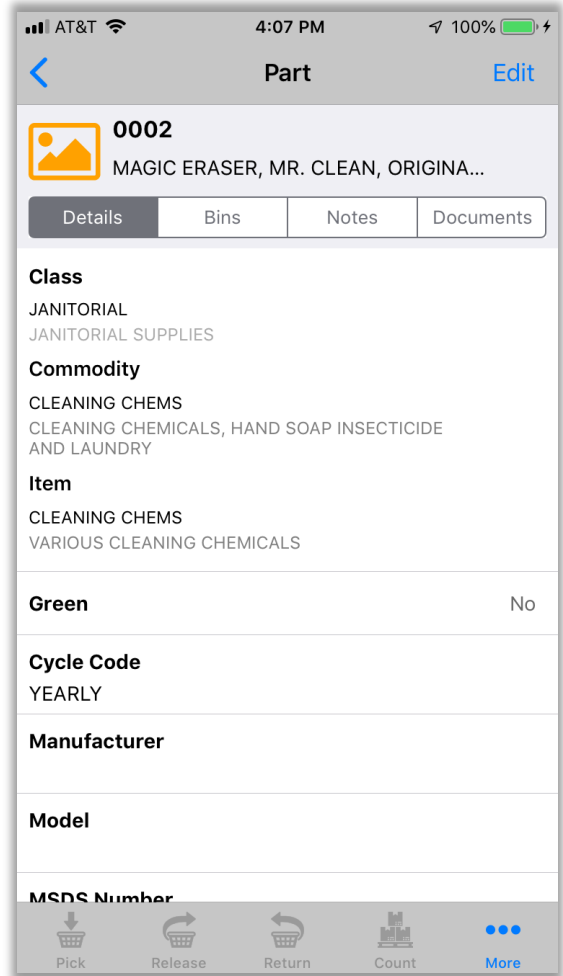


More/Parts/Settings

25. Clicking the More icon will take you to the More options screen.
 - a. Parts – this screen will take you to a barcode scan/search screens where you can look up a specific part. This will show you information about a specific part, including quantity on hand.
 - b. AiM – This will take you to the AiM application.
 - c. Settings – Login and Warehouse settings are set here.



26. Scanning or searching for a part will take you to the part profile screen.



27. Settings will take you to the warehouse and login settings screens.

