pennsylvania

AssetWORKS
Integrated Workplace Management Systems

Go Inventory
Training Guide

July 23, 2019

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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).
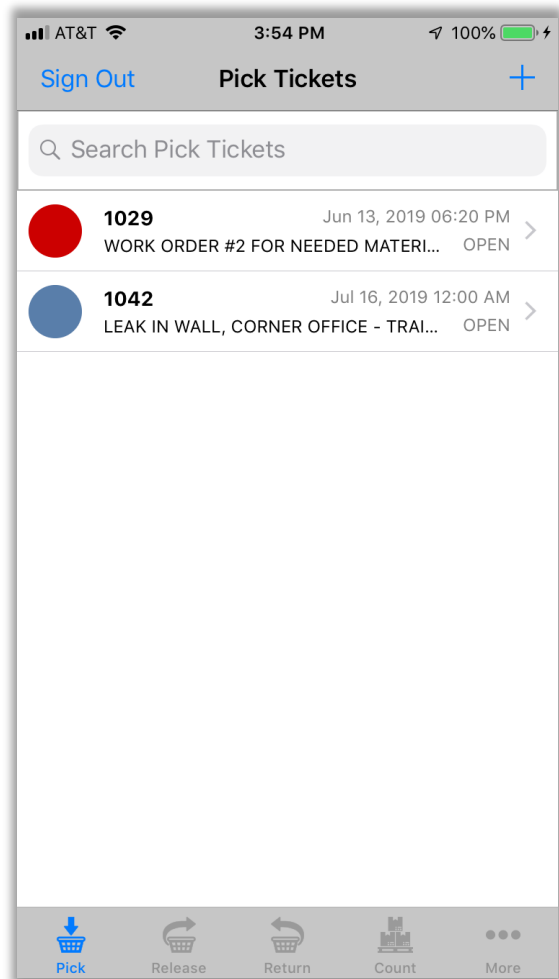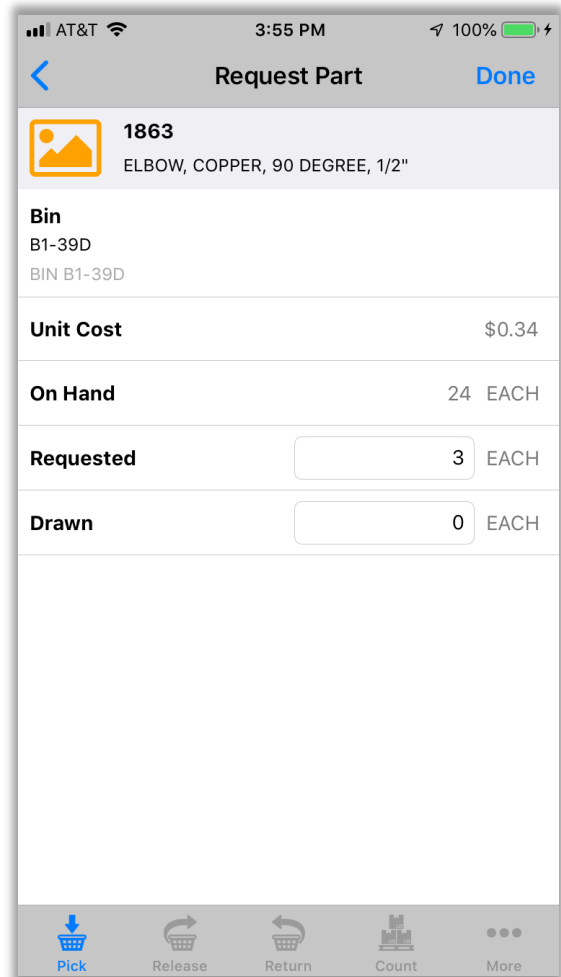
2. The pick ticket screen.

   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.
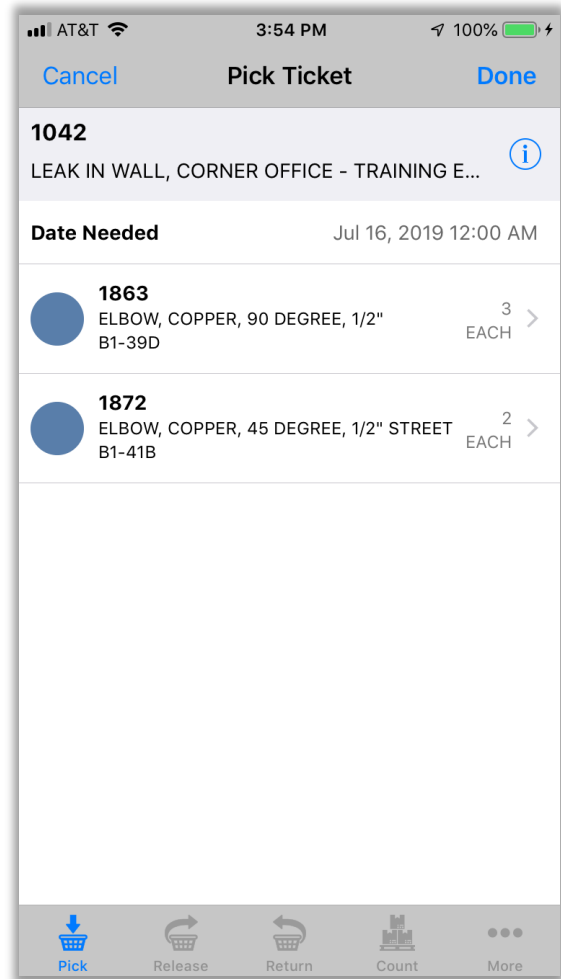
3. The request part screen.
   a. Enter the amount drawn on this screen.
   b. Any less than the requested amount will generate a prompt later asking if you'd like to create a second pick ticket for the undrawn amounts.
   c. Click **Done** to return to the pick ticket screen, with the drawn amount
   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.
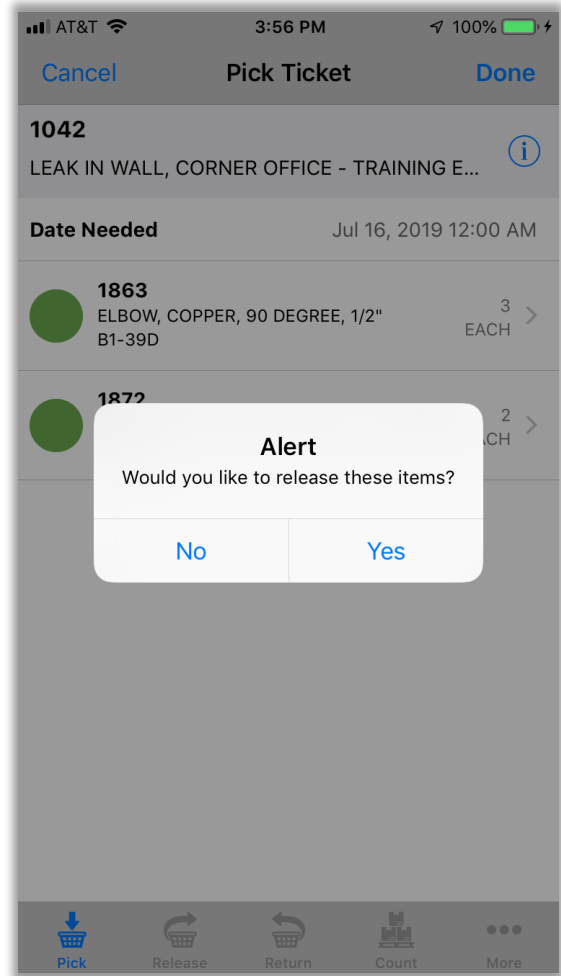
4. Clicking **Done** on the pick ticket screen will prompt whether you have completed this pick ticket. Clicking yes, will change the status of the pick ticket to "**Finalized**" and ask if you are ready to generate the release to the customer.
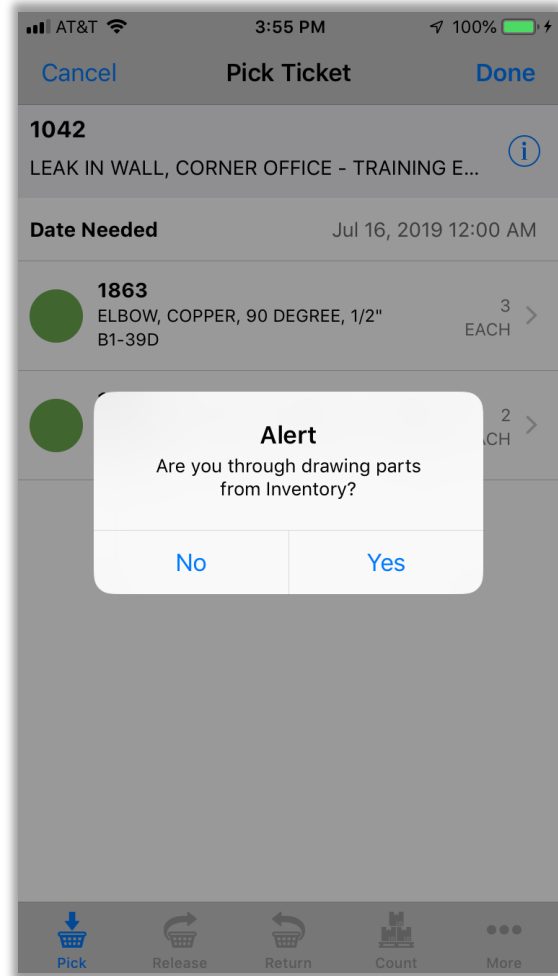
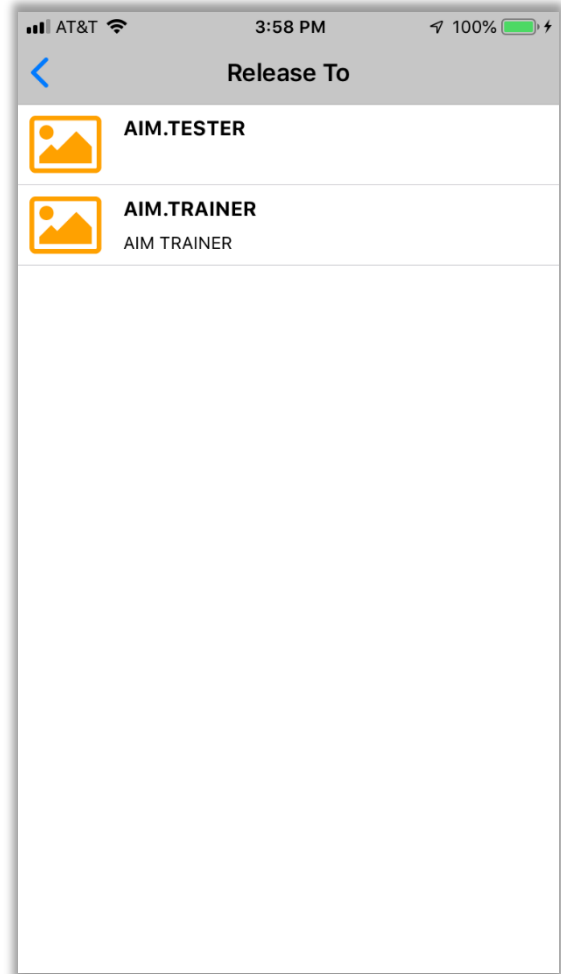5. The prompt asking whether you would like to generate the counter release now.

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

7. Select the employee that is receiving the parts.

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

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.
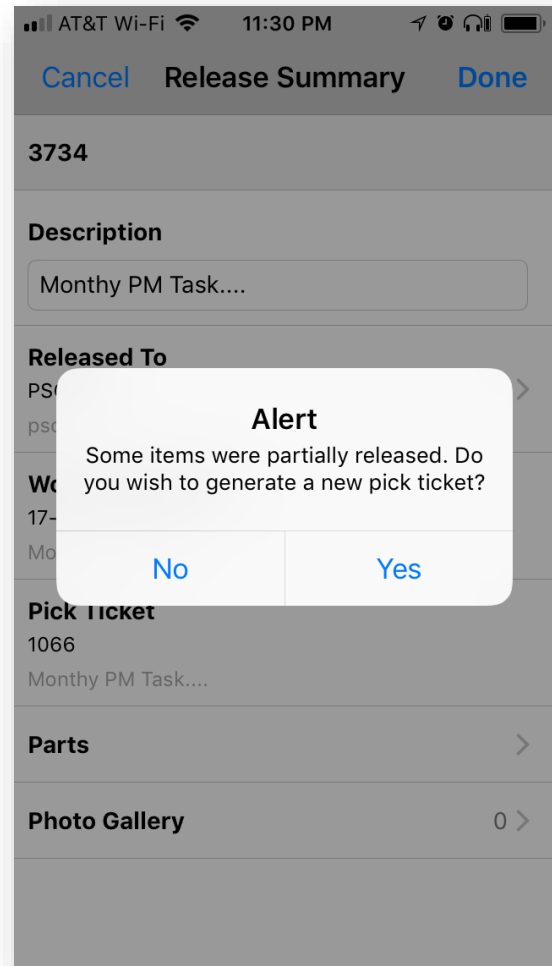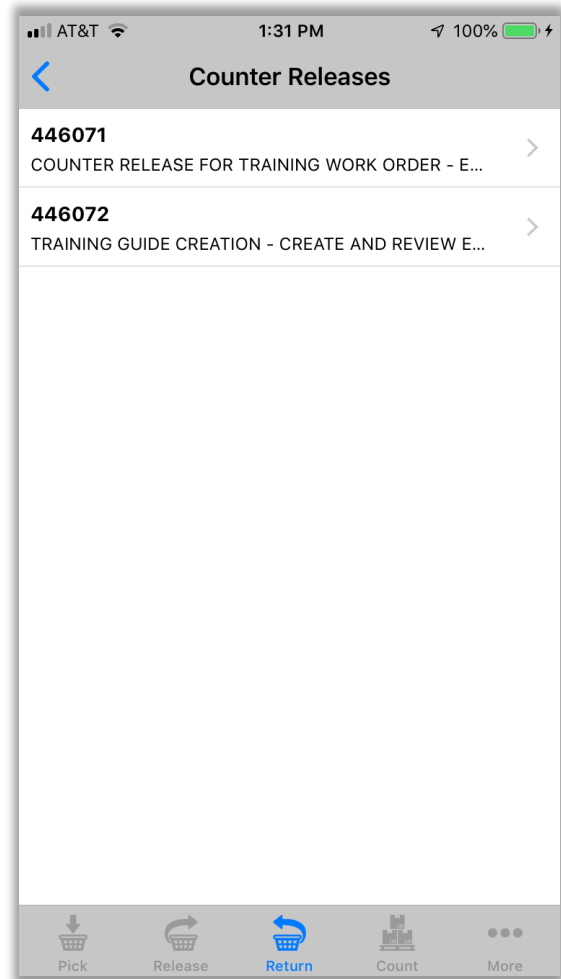
Counter Returns

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
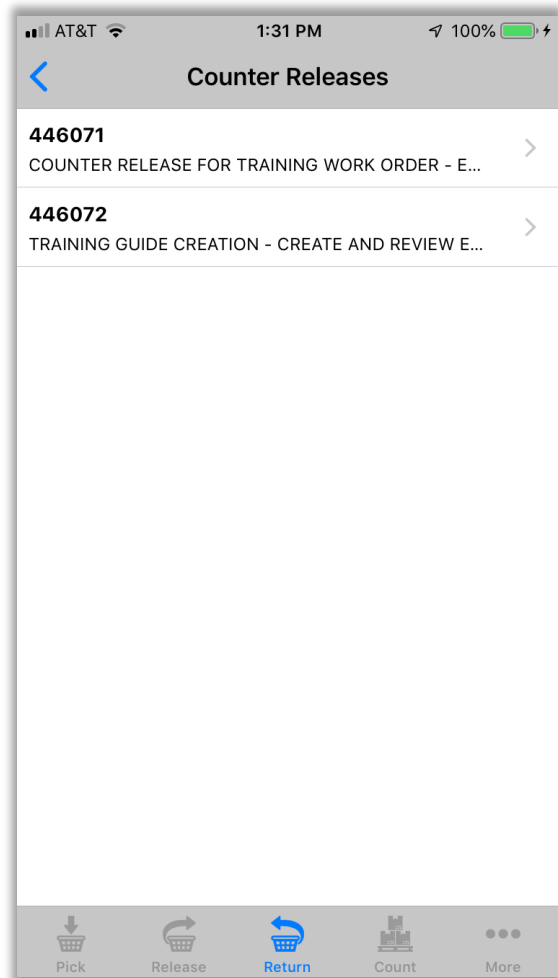
12. The processed counter releases:
    a. Click on a counter release to view the released parts.
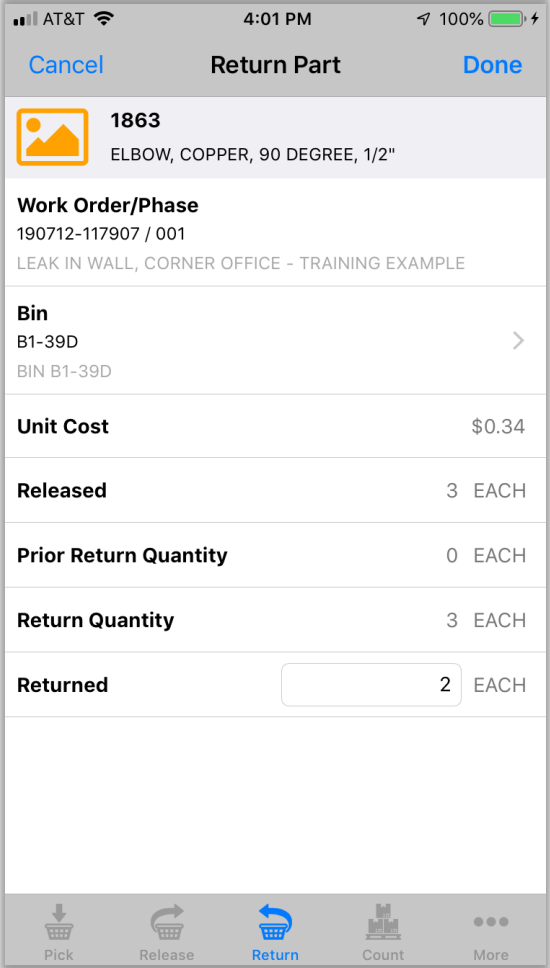
13. The return summary screen.
   a. Click Returned by to scan/search for the employee who is returning the parts. Select the employee.
   b. Click on parts to review all parts listed on the original counter release.
   c. Select a part that is being returned.

14. The parts screen:
   a. Enter the amount that is being **returned**.
   b. Click **Done** to return to the previous released parts screen, retaining the returned amount.
   c. Click **Cancel** to return to the previous released parts screen, without keeping the amount entered in the **returned** field.

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

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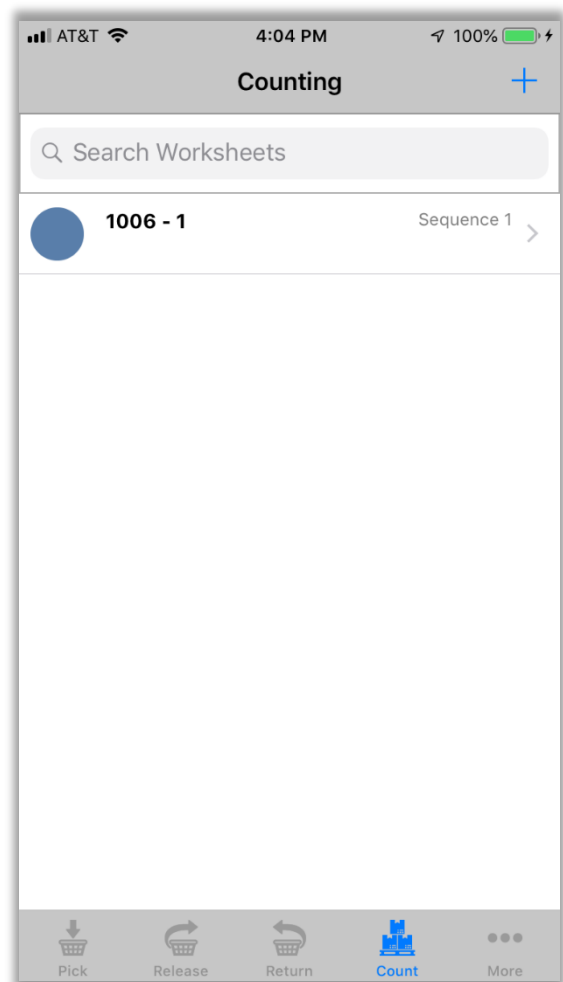
18. The worksheets that are currently in "**GENERATED**" status
    a. Click on the worksheet to modify its status.

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

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.

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

23. The Bin Count screen.
   a. Enter the Item Count amount.
   b. Click the **Next** icon to move to the next bin to count.
   c. Click **Cancel** to return to the list of bins screen.

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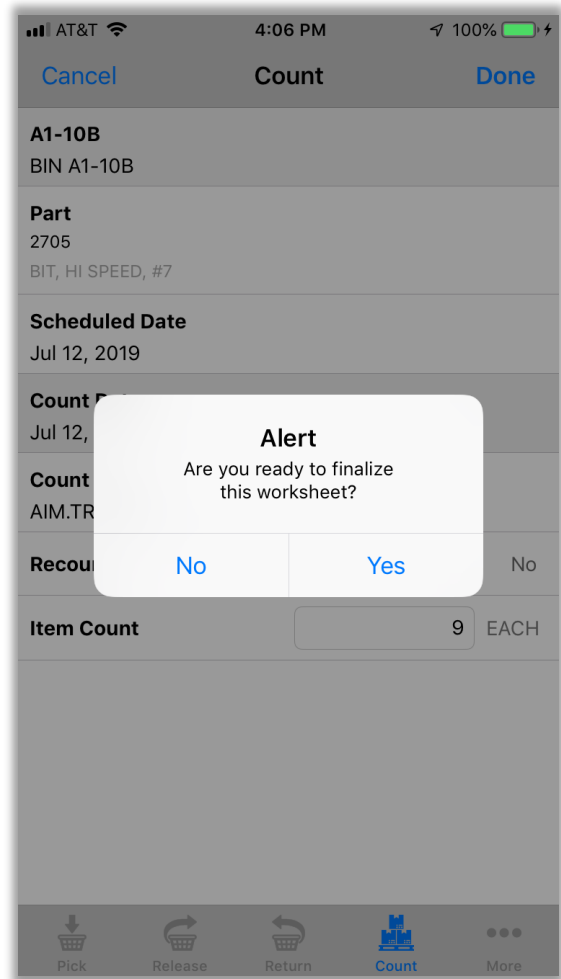
More/Parts/Settings

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.
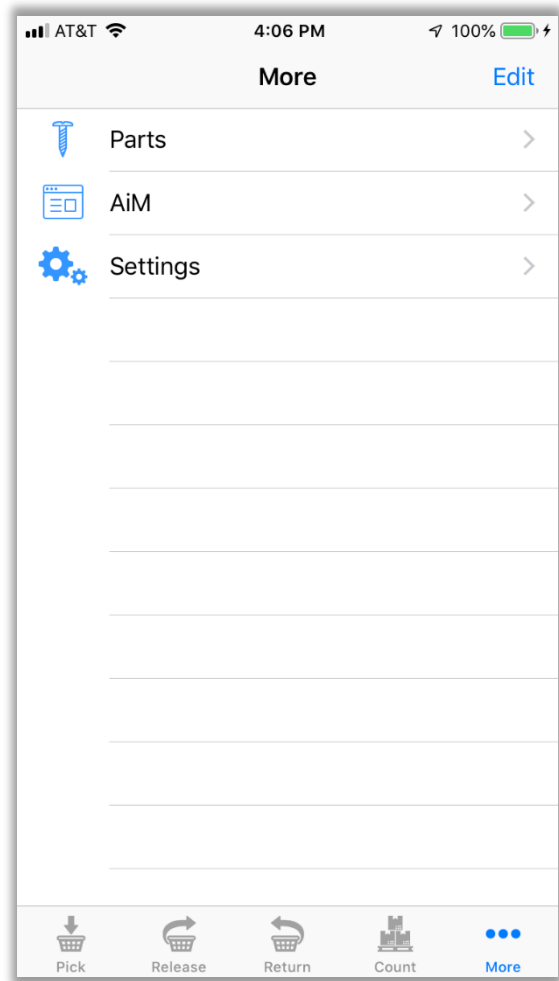
26. Scanning or searching for a part will take you to the part profile screen.
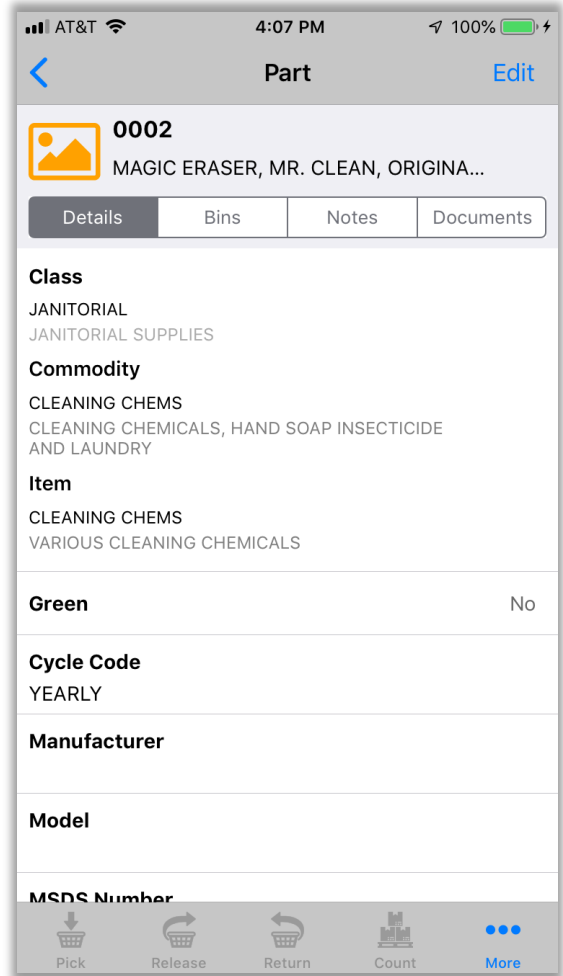
27. Settings will take you to the warehouse and
login settings screens.