

# INVENTORY

## WAREHOUSE END USER TRAINING GUIDE

July 23, 2019

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## Navigation

### Logging into AiM

*Logging into the system:*



The screenshot shows the login interface for AssetWORKS AiM Enterprise IWMS. At the top, the AssetWORKS logo and the URL [www.assetworks.com/iwms](http://www.assetworks.com/iwms) are displayed. The main heading is 'AiM Enterprise IWMS'. On the left is a large blue square icon with the letters 'Ai' inside. To the right of the icon are two input fields: 'User Name' with the text 'aim.trainer' and 'Password' with masked characters. A blue 'Login' button is positioned below the password field. The background features a faint image of a warehouse interior. The footer contains the text 'Copyright 2019, AssetWorks LLC'.

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

Password: This field is populated with the password.

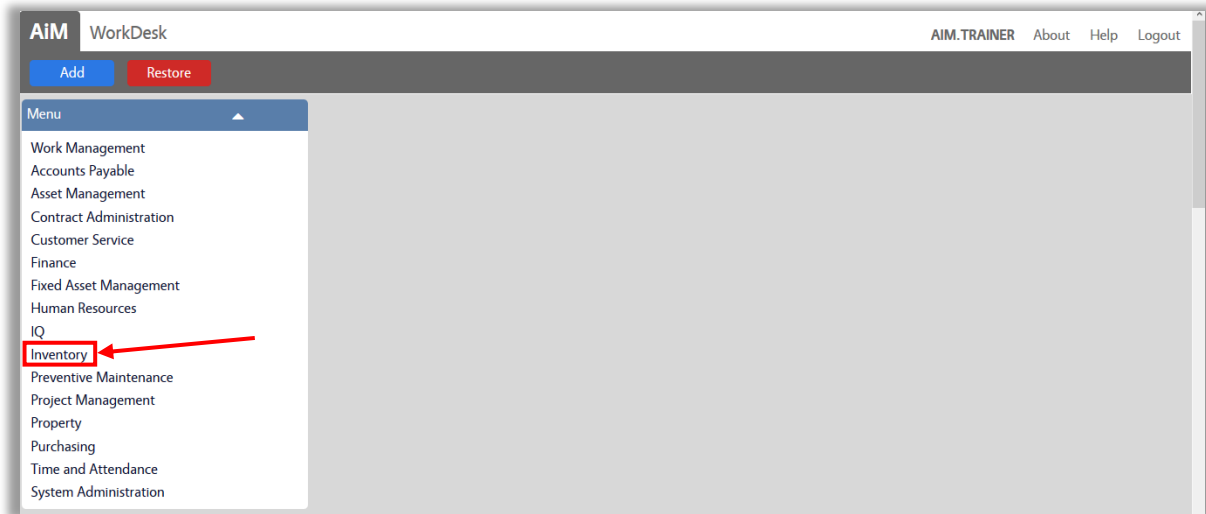
Login: Clicking the login button passes the user login and password information to the system.

## Inventory

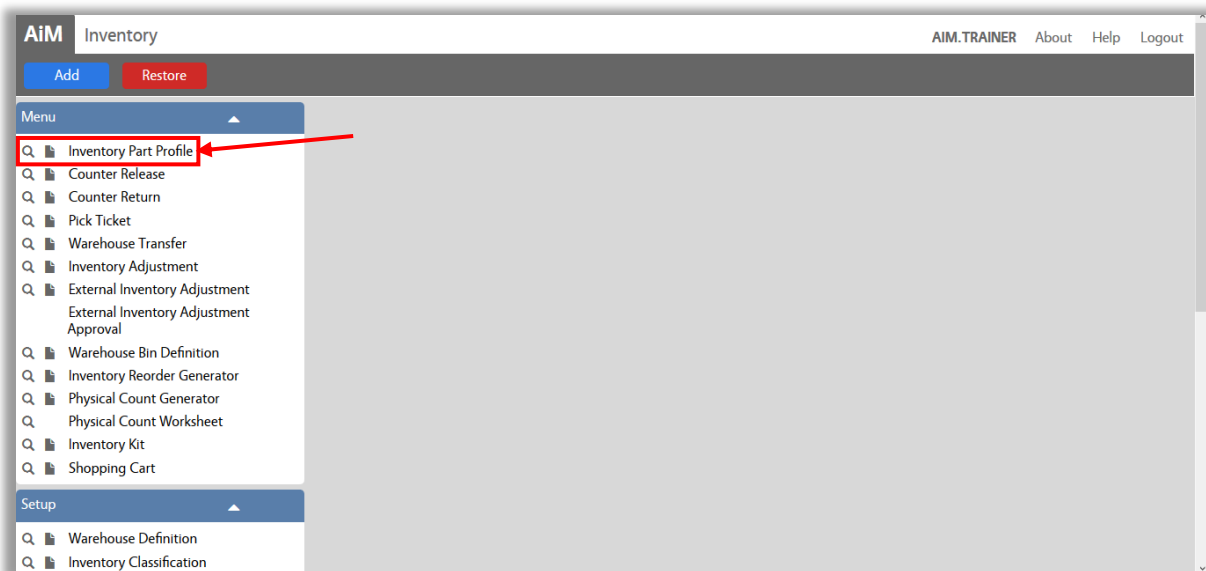
### New Part Entry

This method is used to Create Inventory Parts.

- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click the 'Inventory Part Profile' link.



- 3) Click the 'New' button.

AIM Inventory Part Profile AIM.TRAINER About Help Logout

New Search

Last Edited by On

Class

Commodity

Item

Green

Type

Cycle Code

Manufacturer

Model

MSDS Number

MSDS Required

Active

UOM

UOM Fractional

Search

- 4) Provide an Inventory Part identification. The identification can consist of numbers and/or letters.

AIM Inventory Part Profile AIM.TRAINER About Help Logout

Save Cancel

View

Extra Description

Substitute Parts

Vendors

Warehouses

Kit Usage

Notes Log

User Defined Fields

Related Documents

Last Edited by AIM.TRAINER On 06/19/2019 01:05 PM

Edit

Class

Commodity

Item

Green

Type

Cycle Code

Manufacturer

Model

MSDS Number

MSDS Required

Active

UOM

UOM Fractional

Search

5) Provide a detailed Description.

**AiM Inventory Part Profile** AIM.TRAINER About Help Logout


Save Cancel

**View** V12345 Last Edited by AIM.TRAINER On 06/19/2019 01:10 PM Edit

Extra Description  
Substitute Parts  
Vendors  
Warehouses  
Kit Usage  
Notes Log  
User Defined Fields  
Related Documents

Class  Type Material  
Cycle Code   
Commodity  Manufacturer   
Item  Model   
MSDS Number   
Green No MSDS Required No Active Yes  
UOM   
UOM Fractional No

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6) Click the Class 'Zoom'  icon. Follow the prompts.

**AiM Inventory Part Profile** AIM.TRAINER About Help Logout

Save Cancel

**View** V12345 Last Edited by AIM.TRAINER On 06/19/2019 01:10 PM Edit

Extra Description  
Substitute Parts  
Vendors  
Warehouses  
Kit Usage  
Notes Log  
User Defined Fields  
Related Documents

Class  Type Material  
Cycle Code   
Commodity  Manufacturer   
Item  Model   
MSDS Number   
Green No MSDS Required No Active Yes  
UOM   
UOM Fractional No

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- 7) Select the appropriate Class. Click the 'Class' link.

The screenshot shows the 'Inventory Class' selection interface. At the top, there's a header with 'AiM' and a menu icon, followed by 'Inventory Class'. Below this is a navigation bar with 'Done', 'Search', and 'Cancel' buttons. The main area is a table with two columns: 'Class #' and 'Description'. The table lists five classes: ELECTRICAL, JANITORIAL, OFFICE SUPPLY, PLUMBING, and SAFETY & HEALTH. The 'PLUMBING' class is highlighted with a red box, and a red arrow points to it from the left.

Class #	Description
<a href="#">ELECTRICAL</a>	ELECTRICAL ITEMS
<a href="#">JANITORIAL</a>	JANITORIAL SUPPLIES
<a href="#">OFFICE SUPPLY</a>	OFFICE SUPPLIES
<b><a href="#">PLUMBING</a></b>	PLUMBING SUPPLIES
<a href="#">SAFETY &amp; HEALTH</a>	SAFETY SUPPLIES

- 8) Select the Commodity. Click the Commodity link.


The screenshot shows the 'Commodity' selection interface. At the top, there's a header with 'AiM' and a menu icon, followed by 'Commodity'. Below this is a navigation bar with 'Done', 'Search', 'Show All', and 'Cancel' buttons. Above the table, there's a breadcrumb trail: 'Inventory Class : PLUMBING'. The main area is a table with two columns: 'Commodity #' and 'Description'. The table lists one commodity: REPAIR PARTS. The 'REPAIR PARTS' commodity is highlighted with a red box, and a red arrow points to it from the left.

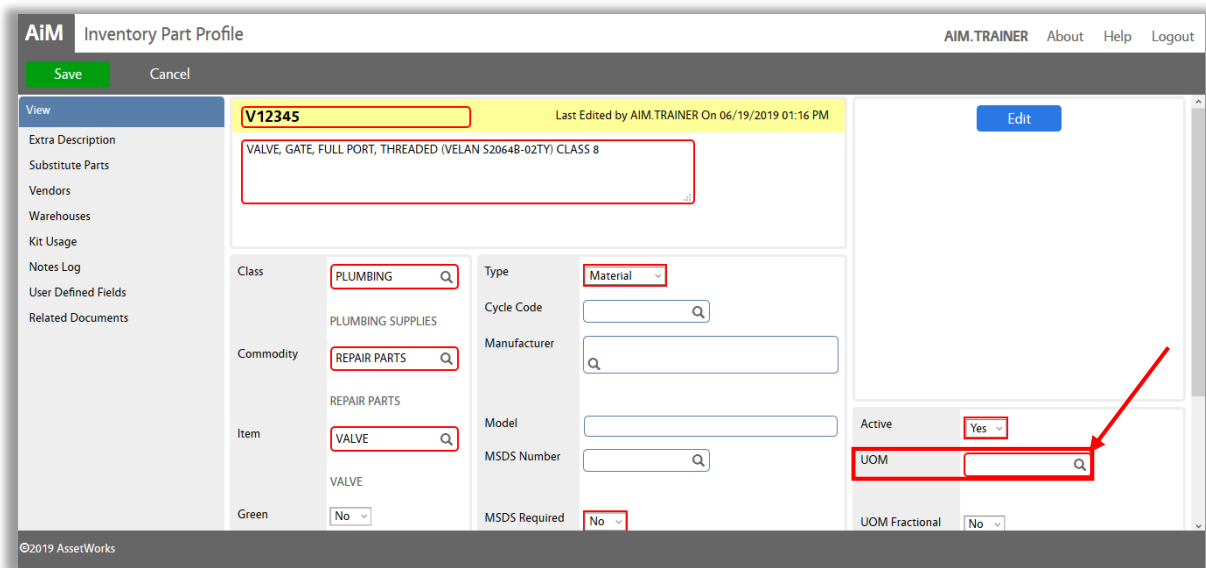
Commodity #	Description
<b><a href="#">REPAIR PARTS</a></b>	REPAIR PARTS

- 9) Select the Item. Click the Item link.

The screenshot shows the 'Inventory Item' selection interface. At the top, there's a header with 'AiM' and a menu icon, followed by 'Inventory Item'. Below this is a navigation bar with 'Done', 'Search', 'Show All', and 'Cancel' buttons. Above the table, there's a breadcrumb trail: 'Inventory Class : PLUMBING' and 'Commodity : REPAIR PARTS'. The main area is a table with two columns: 'Inventory Item #' and 'Description'. The table lists one item: VALVE. The 'VALVE' item is highlighted with a red box, and a red arrow points to it from the left.

Inventory Item #	Description
<b><a href="#">VALVE</a></b>	VALVE

10) Click the UOM (Unit of Measure) 'Zoom'  icon.



**AiM Inventory Part Profile** AIM.TRAINER About Help Logout

Save Cancel

**View** V12345 Last Edited by AIM.TRAINER On 06/19/2019 01:16 PM Edit

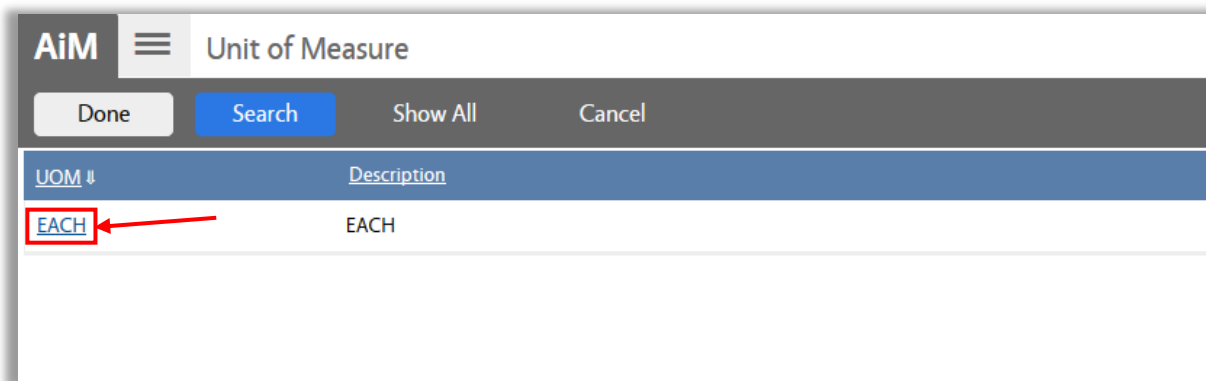
Extra Description  
Substitute Parts  
Vendors  
Warehouses  
Kit Usage  
Notes Log  
User Defined Fields  
Related Documents

Class: PLUMBING (Zoom) Type: Material (Zoom)  
PLUMBING SUPPLIES  
Commodity: REPAIR PARTS (Zoom)  
REPAIR PARTS  
Item: VALVE (Zoom)  
VALVE  
Green: No (Zoom)  
MSDS Required: No (Zoom)

Active: Yes (Zoom)  
UOM: (Zoom)  
UOM Fractional: No (Zoom)

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11) Select the appropriate Unit of Measure.



**AiM Unit of Measure**


Done Search Show All Cancel

UOM ↓	Description
EACH	EACH

12) Select the 'Save' button.

The screenshot shows the 'Inventory Part Profile' form. The 'Save' button is highlighted with a red box and a red arrow. The form contains the following data:

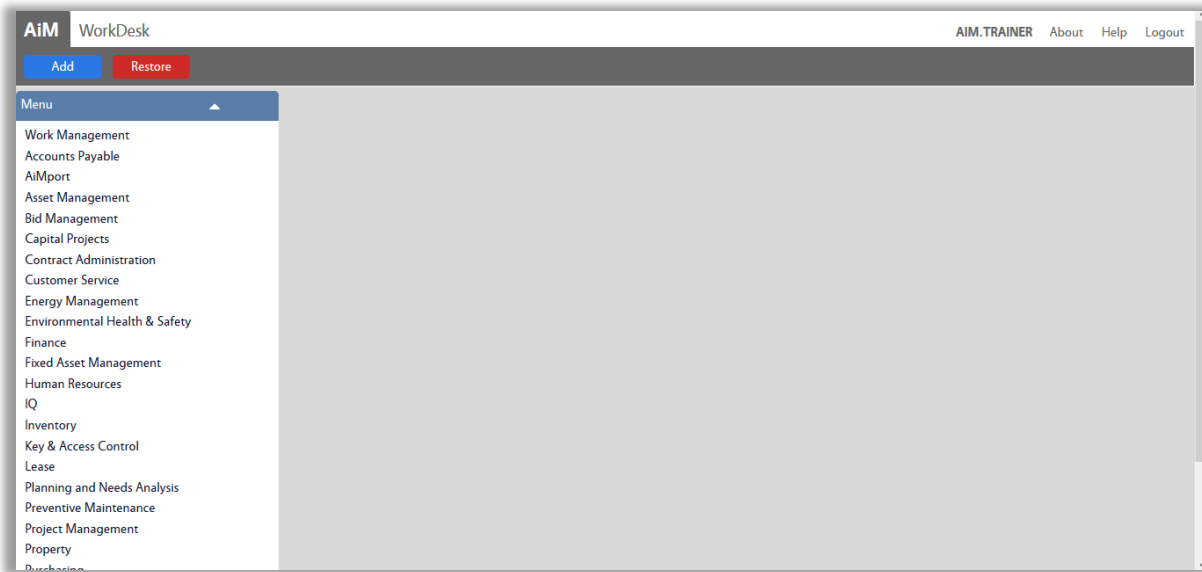
Field	Value
Part Number	V12345
Description	VALVE, GATE, FULL PORT, THREADED (VELAN S20648-02TY) CLASS 8
Class	PLUMBING
Commodity	REPAIR PARTS
Item	VALVE
Type	Material
Active	Yes
UOM	EACH
MSDS Required	No

13) Click the AiM™  logo to return to the main Work Desk.

The screenshot shows the 'Inventory Part Profile' form. The 'AiM' logo is highlighted with a red box and a red arrow. The form contains the following data:

Field	Value
Part Number	V12345
Description	VALVE, GATE, FULL PORT, THREADED (VELAN S20648-02TY) CLASS 8
Class	PLUMBING
Commodity	REPAIR PARTS
Item	VALVE
Type	Material
Active	Yes
UOM	EACH
MSDS Required	No

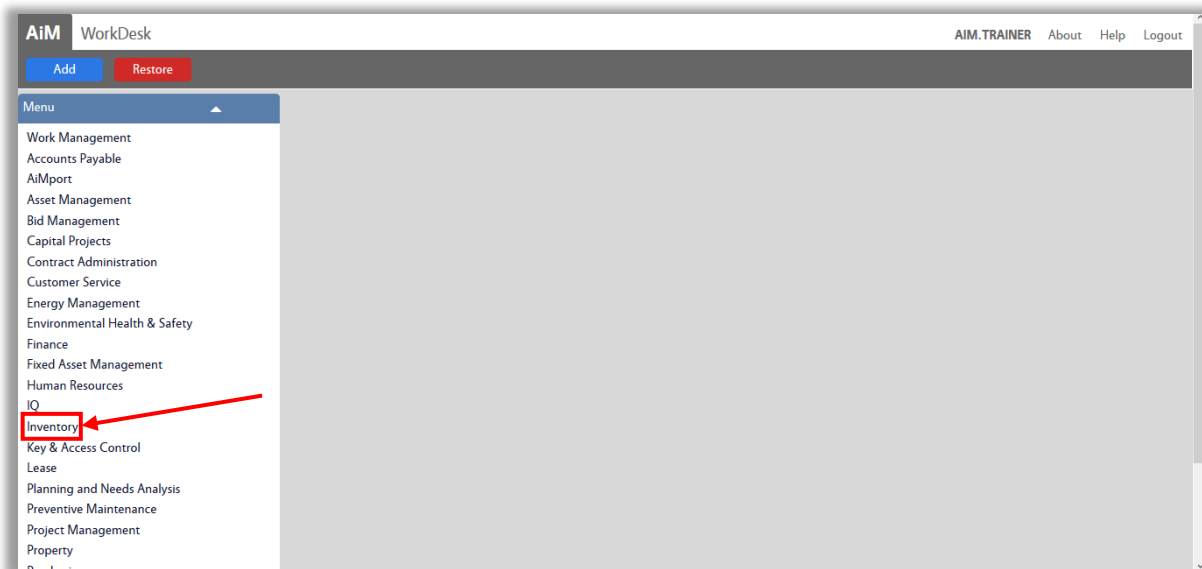
14) The main Work Desk. The Process is complete.



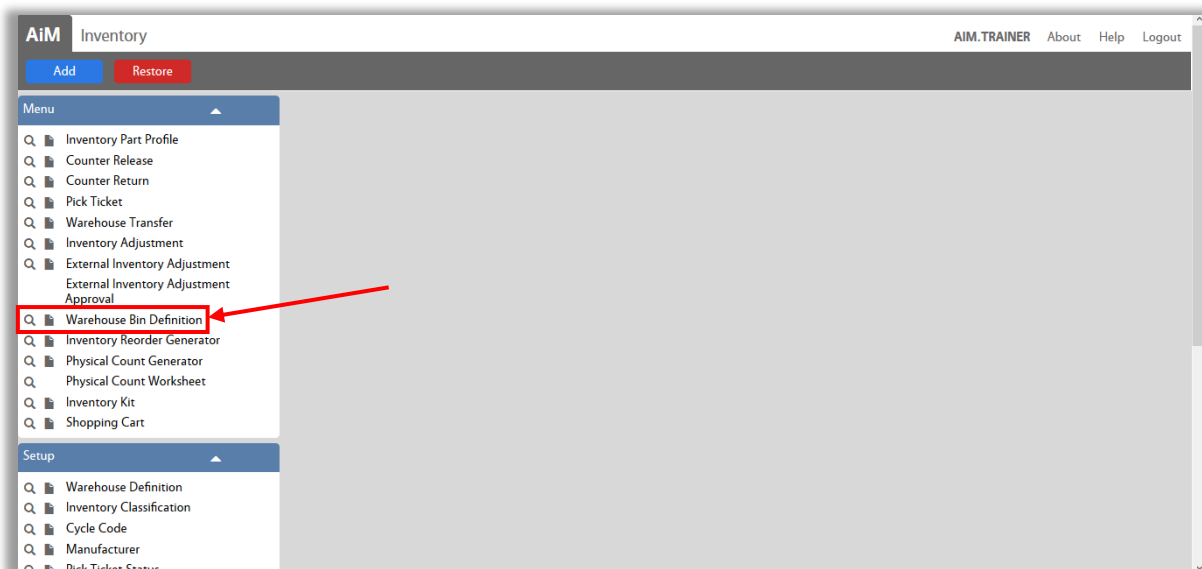
## Warehouse Bin Definition

This method is used to define a Warehouse Bin.

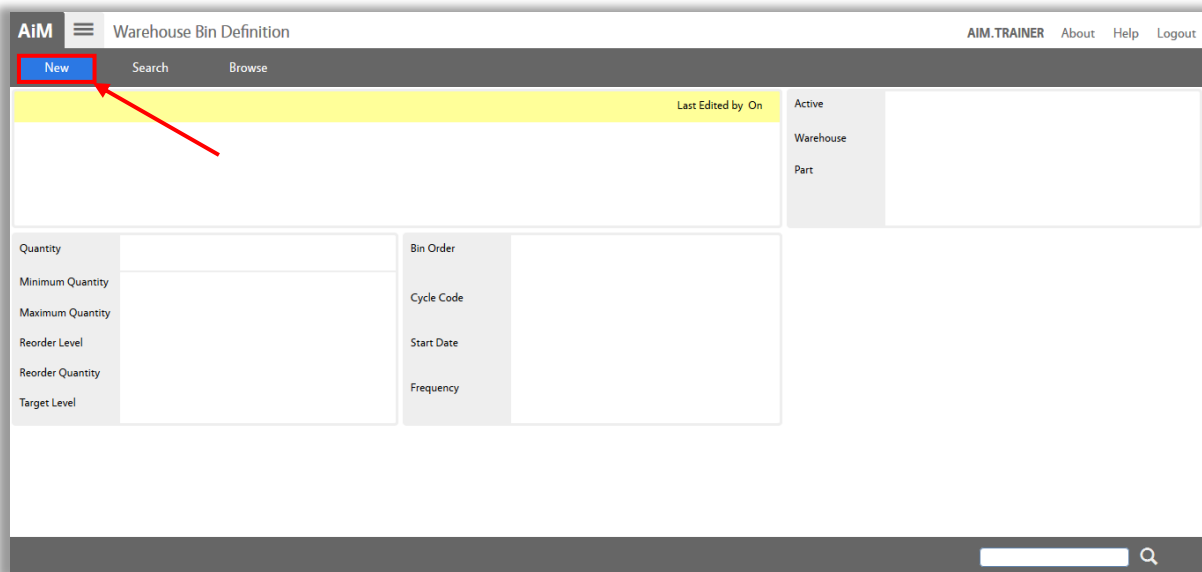
- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click the 'Warehouse Bin Definition' link.

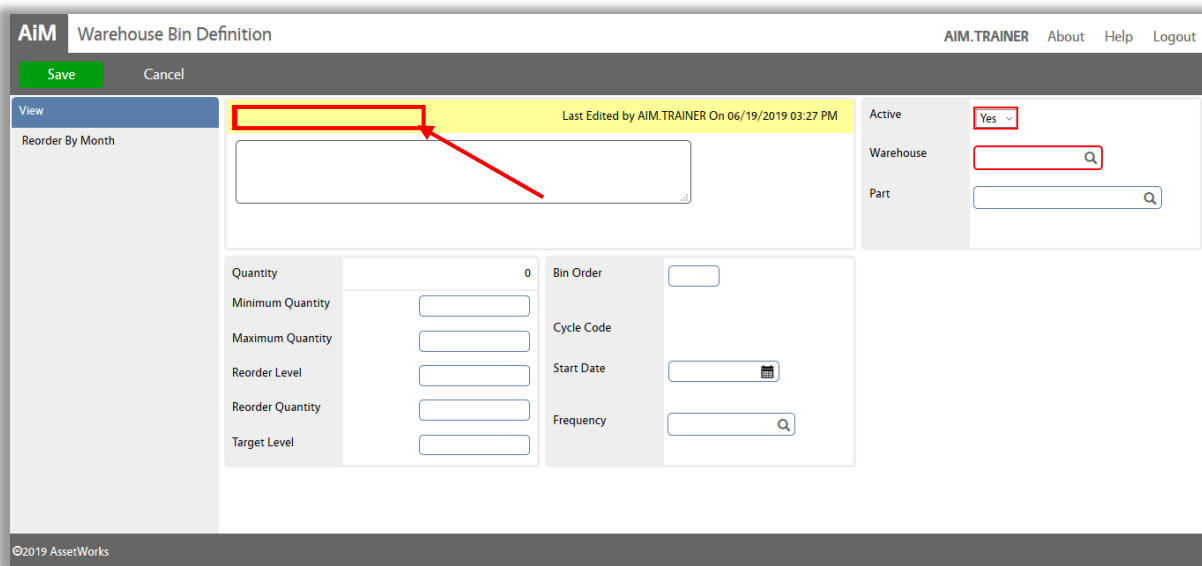


3) Click the 'New' button.



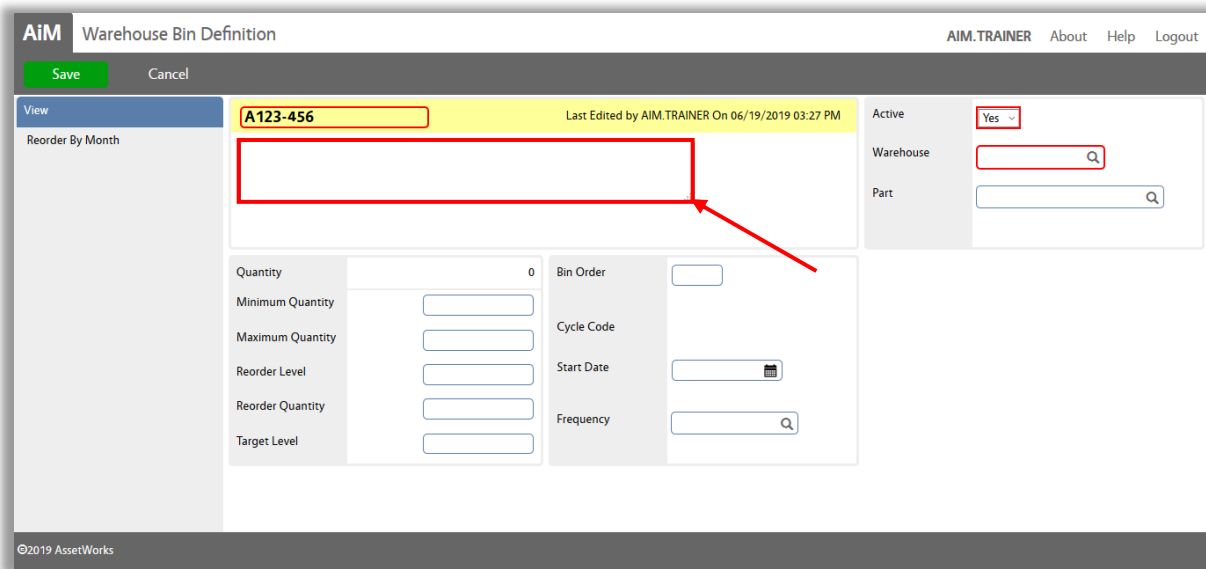
The screenshot shows the 'Warehouse Bin Definition' form in the AiM system. The 'New' button is highlighted with a red box, and a red arrow points to it. The form includes a header with 'AiM' and 'Warehouse Bin Definition', and a sub-header with 'AIM.TRAINER', 'About', 'Help', and 'Logout'. The main area contains a table with columns for 'Quantity', 'Minimum Quantity', 'Maximum Quantity', 'Reorder Level', 'Reorder Quantity', 'Target Level', 'Bin Order', 'Cycle Code', 'Start Date', and 'Frequency'. The 'New' button is located in the top left corner of the form.

4) Provide a Bin Identification Code.




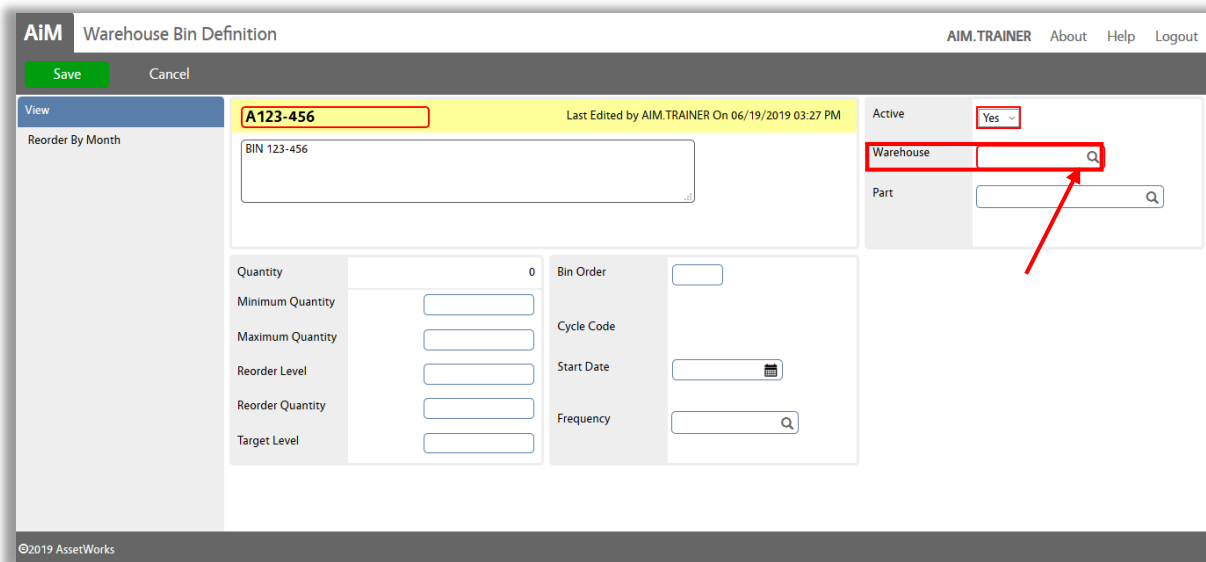
The screenshot shows the 'Warehouse Bin Definition' form in the AiM system. The 'Bin Identification Code' field is highlighted with a red box, and a red arrow points to it. The form includes a header with 'AiM' and 'Warehouse Bin Definition', and a sub-header with 'AIM.TRAINER', 'About', 'Help', and 'Logout'. The main area contains a table with columns for 'Quantity', 'Minimum Quantity', 'Maximum Quantity', 'Reorder Level', 'Reorder Quantity', 'Target Level', 'Bin Order', 'Cycle Code', 'Start Date', and 'Frequency'. The 'Bin Identification Code' field is located in the top left corner of the form.

- 5) Optional: Provide a detailed Description.



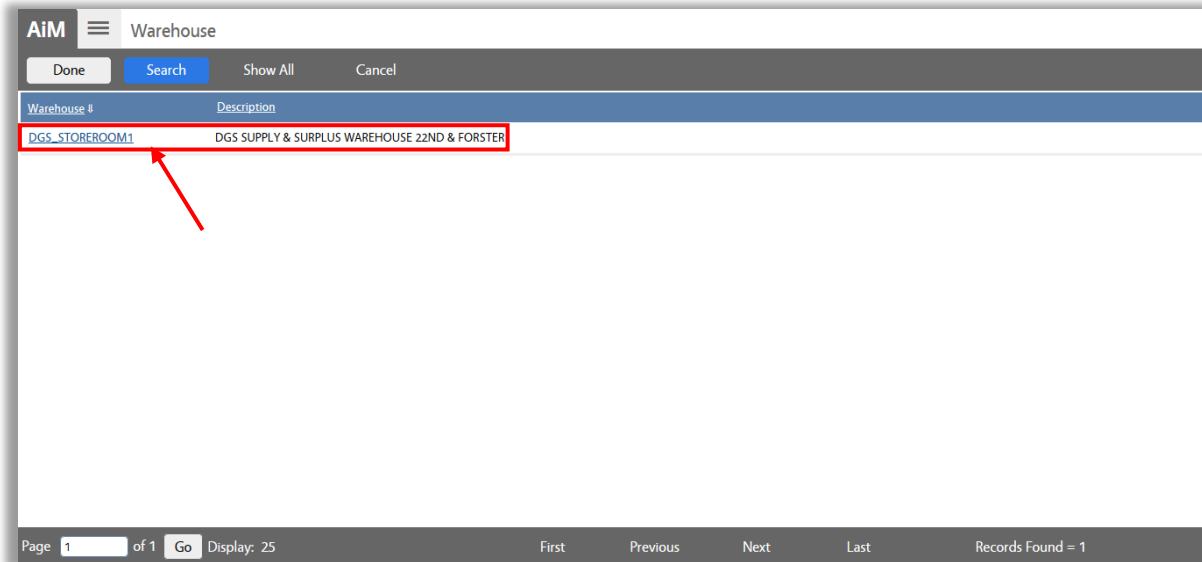
The screenshot shows the 'Warehouse Bin Definition' form. The 'Bin ID' field is highlighted with a yellow box and contains the value 'A123-456'. The 'Last Edited by' field shows 'AIM.TRAINER On 06/19/2019 03:27 PM'. The 'Active' checkbox is checked. The 'Warehouse' and 'Part' fields have search icons. The 'Description' field is highlighted with a red box, and a red arrow points to it. The 'Quantity' field is set to 0. The 'Bin Order' field is empty. The 'Cycle Code' field is empty. The 'Start Date' field has a calendar icon. The 'Frequency' field has a search icon. The 'Minimum Quantity', 'Maximum Quantity', 'Reorder Level', 'Reorder Quantity', and 'Target Level' fields are empty.

- 6) Click the 'Warehouse' Zoom  icon.



The screenshot shows the 'Warehouse Bin Definition' form. The 'Bin ID' field is highlighted with a yellow box and contains the value 'A123-456'. The 'Last Edited by' field shows 'AIM.TRAINER On 06/19/2019 03:27 PM'. The 'Active' checkbox is checked. The 'Warehouse' field is highlighted with a red box, and a red arrow points to the 'Zoom' icon (magnifying glass) next to it. The 'Part' field has a search icon. The 'Description' field contains the text 'BIN 123-456'. The 'Quantity' field is set to 0. The 'Bin Order' field is empty. The 'Cycle Code' field is empty. The 'Start Date' field has a calendar icon. The 'Frequency' field has a search icon. The 'Minimum Quantity', 'Maximum Quantity', 'Reorder Level', 'Reorder Quantity', and 'Target Level' fields are empty.

7) Select the 'Warehouse', click the associated Warehouse link.



8) Insert your Bin Levels by entering the numeric values in the associated boxes.

The screenshot shows the 'Warehouse Bin Definition' form in the AssetWorks application. The bin ID is 'A123-456' and the warehouse is 'DGS\_STOREROOM'. The 'Quantities' section is highlighted with a red box, and a red arrow points to the 'Quantity' field. The 'Quantities' section includes the following fields:

- Quantity: 0
- Minimum Quantity: [ ]
- Maximum Quantity: [ ]
- Reorder Level: [ ]
- Reorder Quantity: [ ]
- Target Level: [ ]

The 'Bin Order' section includes the following fields:

- Bin Order: [ ]
- Cycle Code: [ ]
- Start Date: [ ]
- Frequency: [ ]

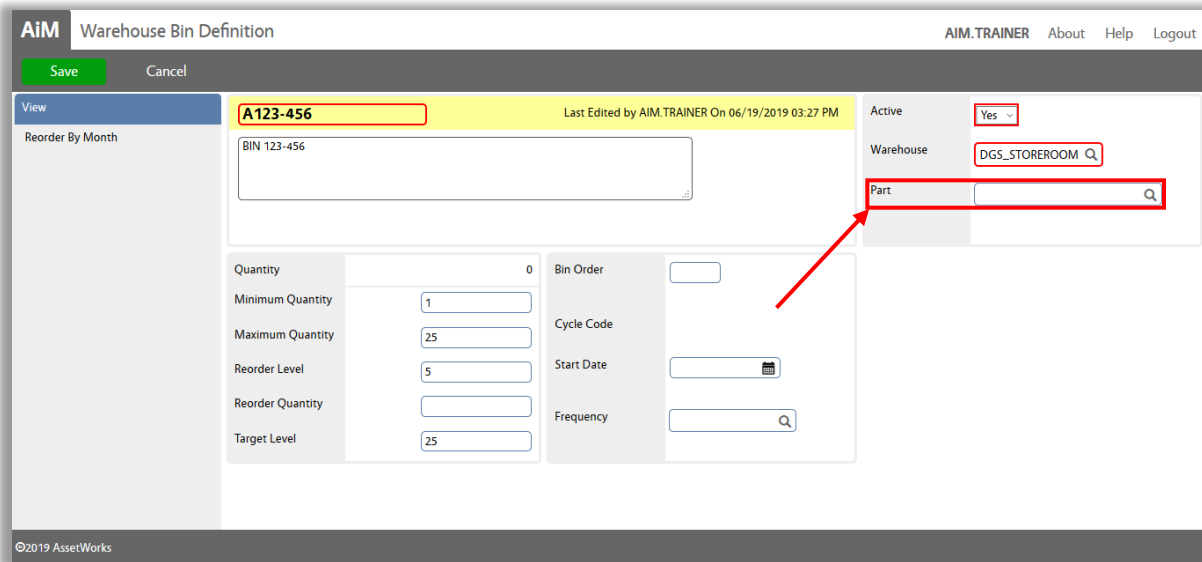
The Quantities Block displays the on-hand quantity currently in the bin, as well as inventory control quantities for minimum/maximum levels, reorder level and reorder quantity (or a target level). These quantities are by warehouse/bin and will be used by the automated inventory reorder generator to determine when to order parts and how many to order. If the target level is being used, the part will be reordered every time the on-hand quantity is below the target level. Alternatively, the reorder level triggers a reorder of a defined reorder quantity once reached. The reorder quantity will only be order once the on-hand inventory level is equal or less than the reorder level. The target level and reorder level methods cannot be used simultaneously.

The target level now allows a reorder point to be set. If a reorder level is set to only order once it is reached, users can now continue burn down to the reorder level. The validation is relaxed on the reorder level plus the reorder quantity versus the target level and allows the user to enter a third way to handle the reorder that is to set the reorder level and target level.

Now Three Methods:

1. Reorder + Reorder Quantity
2. Target Level Only
3. Target Level + Reorder Level (New in AiM 8.0)

- 9) If you have an Inventory Part that belongs in this bin, add it by clicking the 'Zoom' icon and selecting the appropriate part.



**AiM Warehouse Bin Definition** AIM.TRAINER About Help Logout

Save Cancel

View Reorder By Month

**A123-456** Last Edited by AIM.TRAINER On 06/19/2019 03:27 PM

BIN 123-456

Active Yes

Warehouse DGS\_STOREROOM

Part

Quantity 0

Minimum Quantity 1

Maximum Quantity 25

Reorder Level 5

Reorder Quantity

Target Level 25

Bin Order

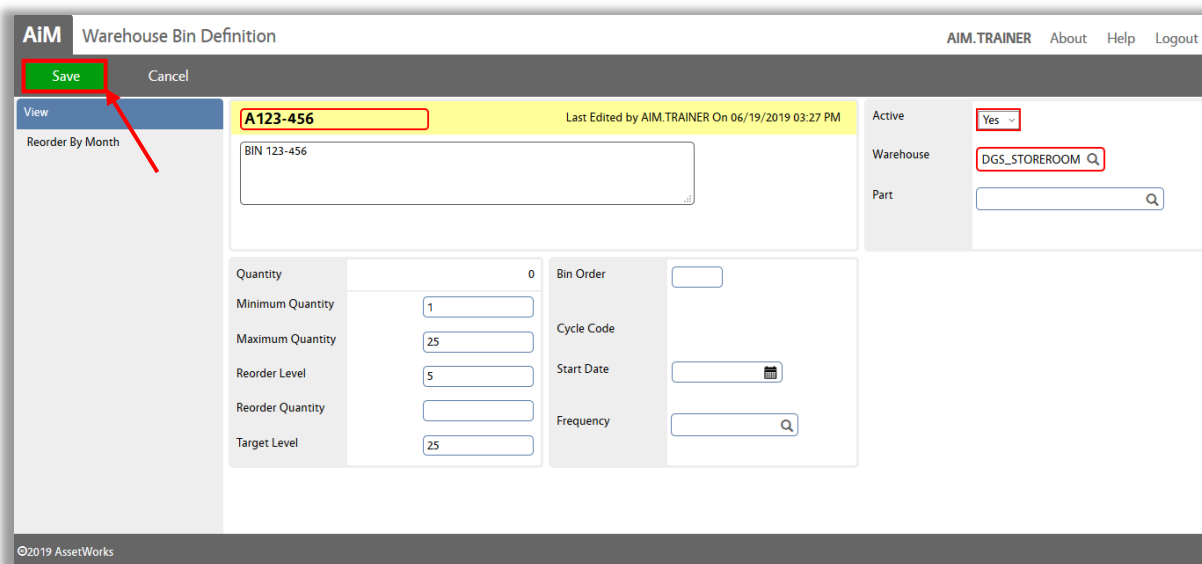
Cycle Code

Start Date

Frequency

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- 10) Click the 'Save' button.



**AiM Warehouse Bin Definition** AIM.TRAINER About Help Logout

Save Cancel

View Reorder By Month

**A123-456** Last Edited by AIM.TRAINER On 06/19/2019 03:27 PM

BIN 123-456

Active Yes

Warehouse DGS\_STOREROOM

Part

Quantity 0

Minimum Quantity 1

Maximum Quantity 25

Reorder Level 5

Reorder Quantity

Target Level 25


Bin Order

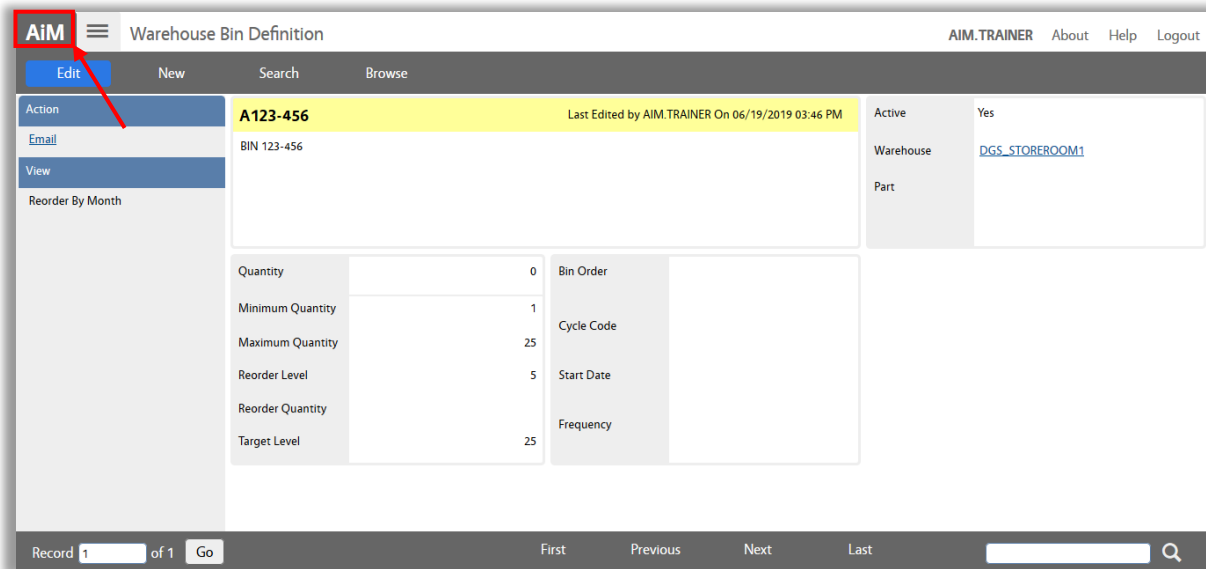
Cycle Code

Start Date

Frequency

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11) Click the AiM™  logo to return to the main Work Desk.



**AiM** Warehouse Bin Definition AIM.TRAINER About Help Logout

Edit New Search Browse

**Action** **A123-456** Last Edited by AIM.TRAINER On 06/19/2019 03:46 PM Active Yes

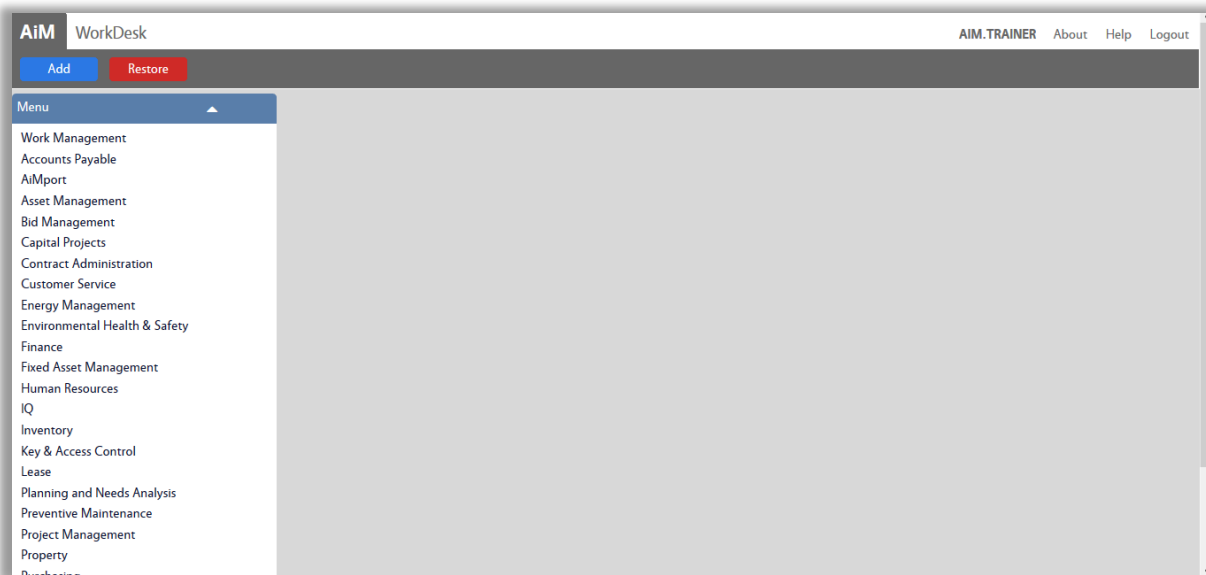
Email BIN 123-456 Warehouse [DGS\\_STOREROOM1](#)

View Reorder By Month Part

Quantity	0	Bin Order	
Minimum Quantity	1	Cycle Code	
Maximum Quantity	25	Start Date	
Reorder Level	5	Frequency	
Reorder Quantity			
Target Level	25		

Record 1 of 1 Go First Previous Next Last

12) The Main Work Desk. The Process is complete.



**AiM** WorkDesk AIM.TRAINER About Help Logout

Add Restore

Menu

- Work Management
- Accounts Payable
- AiMport
- Asset Management
- Bid Management
- Capital Projects
- Contract Administration
- Customer Service
- Energy Management
- Environmental Health & Safety
- Finance
- Fixed Asset Management
- Human Resources
- IQ
- Inventory
- Key & Access Control
- Lease
- Planning and Needs Analysis
- Preventive Maintenance
- Project Management
- Property
- Purchasing

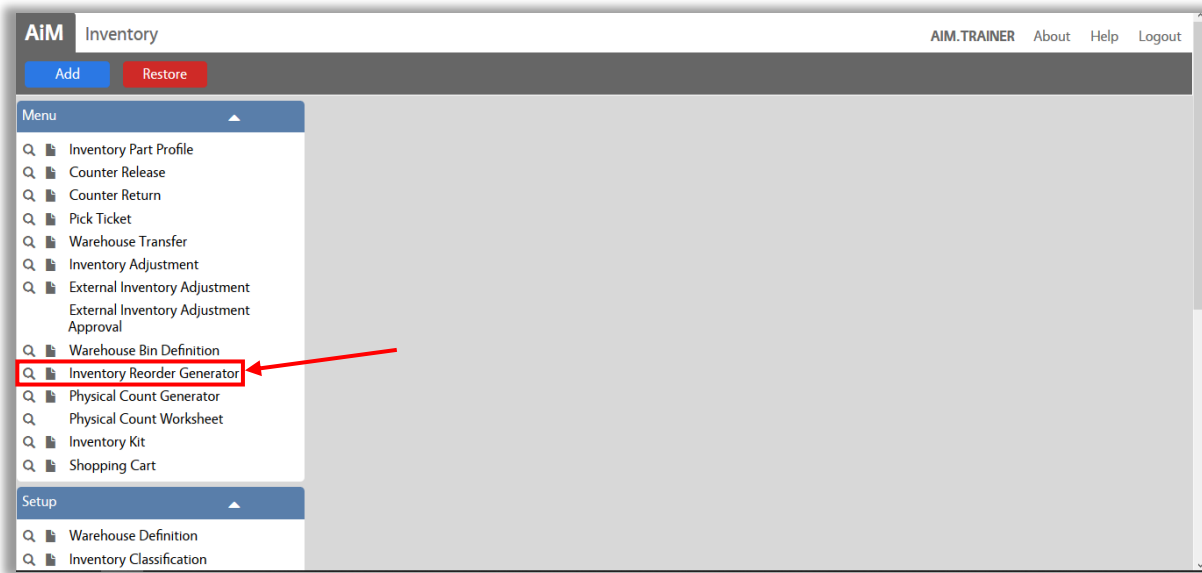
## Inventory Reorder Generation

This method is used to reorder stocked Inventory Parts.

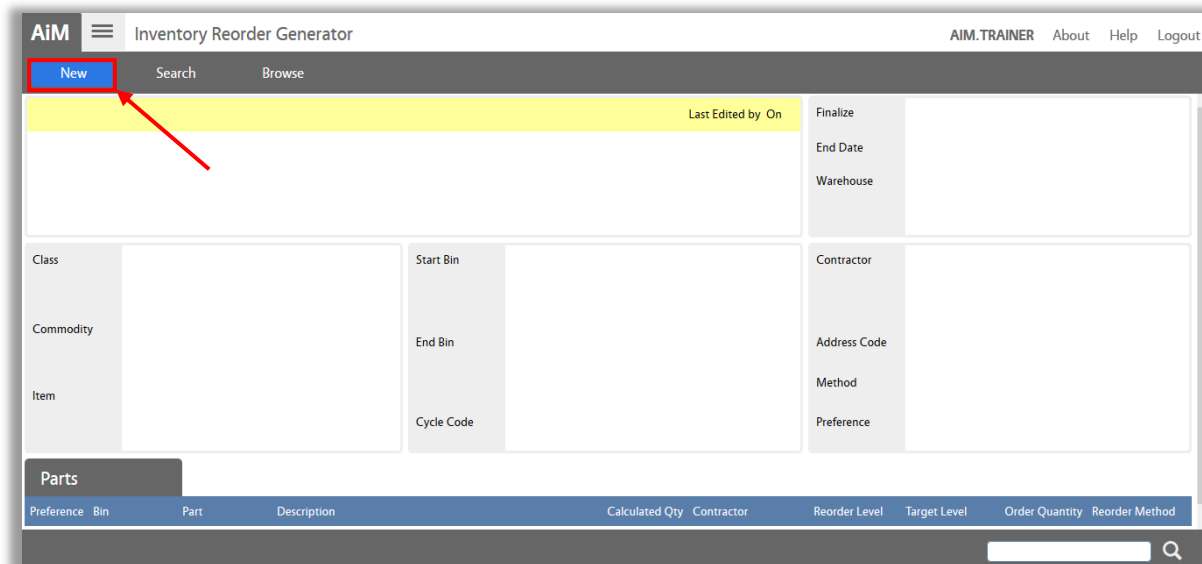
- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click the 'Inventory Reorder Generator' link.



3) Click the 'New' Button.



4) Provide a detailed description.

**AiM Inventory Reorder Generator** AIM.TRAINER About Help Logout

Save Cancel

**1005** Last Edited by AIM.TRAINER On 06/21/2019 09:52 AM

Finalize No

End Date

Warehouse

Contractor

Address Code

Method

Preference

Class

Commodity

Item

Start Bin

End Bin

Cycle Code

Parts

Preference Bin Part Description Calculated Qty Contractor Reorder Level Target Level Order Quantity Reorder Method

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- 5) Optional: Use one of the filters to select which Bins, Contractor, or Class/Commodity/Item's to reorder.

**AiM Inventory Reorder Generator** AIM.TRAINER About Help Logout

Save Cancel

**1005** Last Edited by AIM.TRAINER On 06/21/2019 09:52 AM

Finalize No

End Date

Warehouse

Contractor

Address Code

Method

Preference

Class

Commodity

Item

Start Bin

End Bin


Cycle Code

Parts

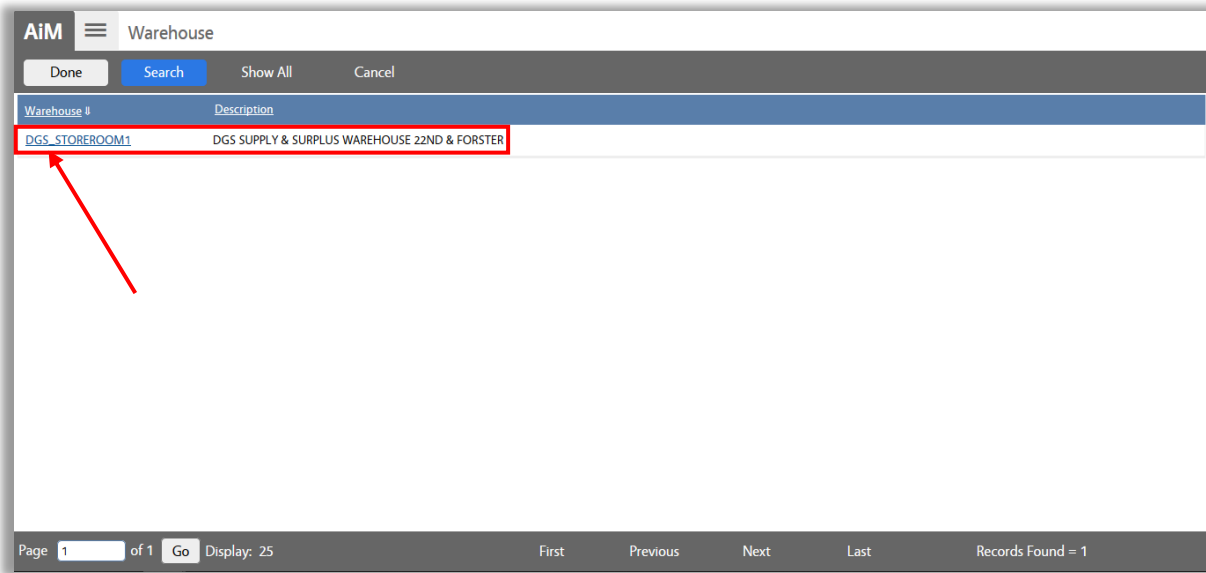
Preference Bin Part Description Calculated Qty Contractor Reorder Level Target Level Order Quantity Reorder Method

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- 6) Optional: Click the 'End Date' Calendar Icon . Select the appropriate Date.

7) Click the 'Warehouse' Zoom  icon.

8) Select the appropriate Warehouse by clicking the associated link.



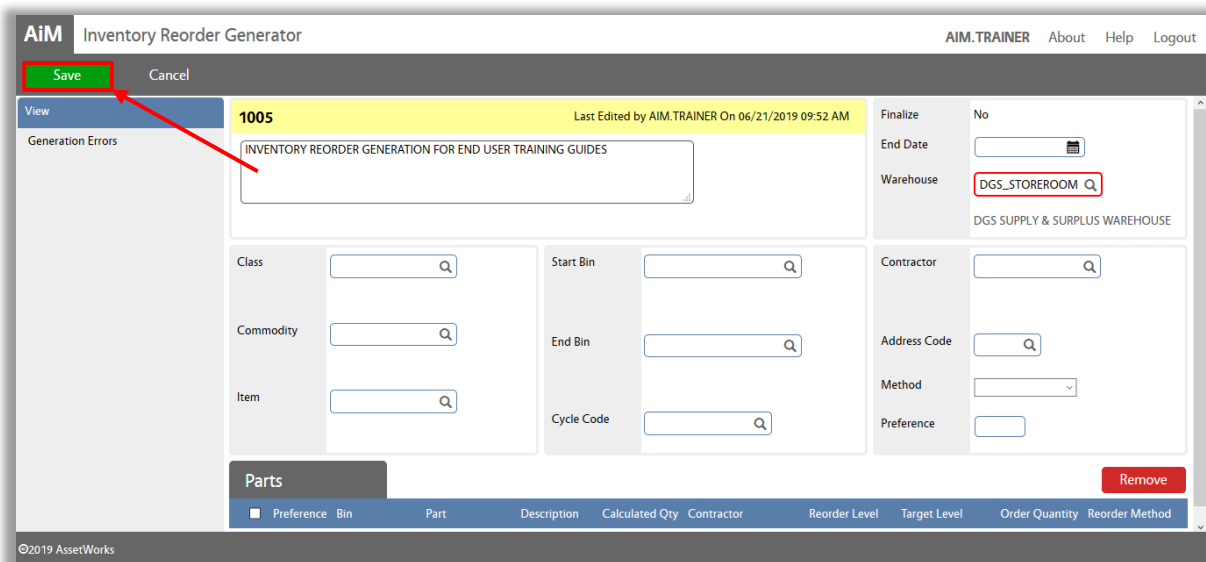
**AiM Warehouse**

Done Search Show All Cancel

Warehouse #	Description
DGS_STOREROOM1	DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FORSTER

Page 1 of 1 Go Display: 25 First Previous Next Last Records Found = 1

9) Click the 'Save' button.



**AiM Inventory Reorder Generator**

AIM.TRAINER About Help Logout

Save Cancel

View  
Generation Errors

**1005** Last Edited by AIM.TRAINER On 06/21/2019 09:52 AM

INVENTORY REORDER GENERATION FOR END USER TRAINING GUIDES

Finalize No

End Date

Warehouse DGS\_STOREROOM1

DGS SUPPLY & SURPLUS WAREHOUSE

Contractor

Address Code

Method

Preference

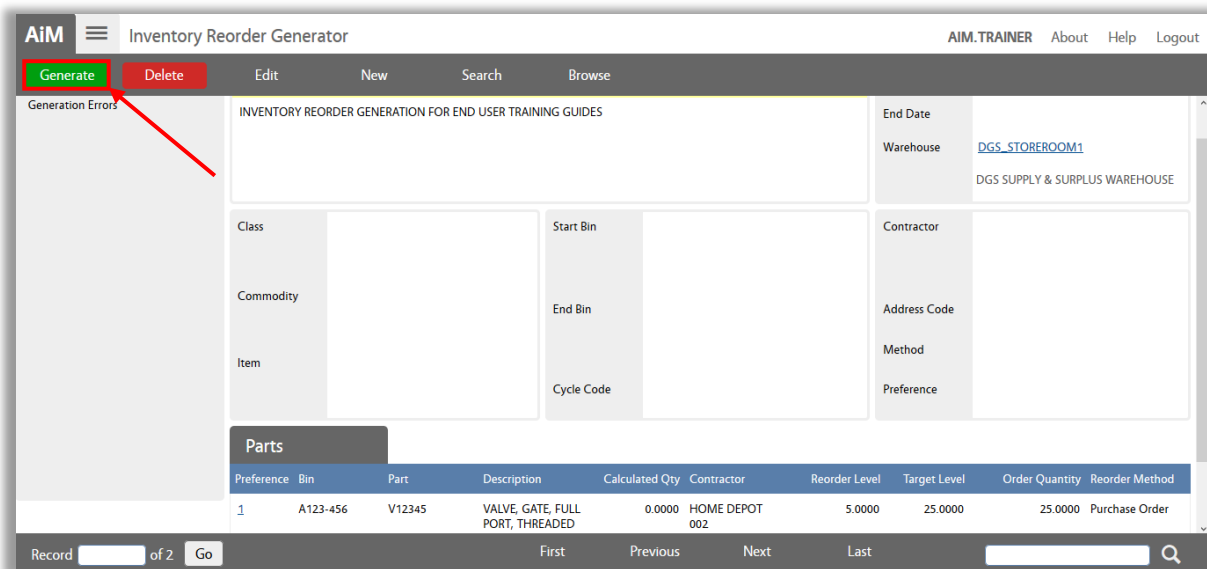
Remove

Parts

Preference	Bin	Part	Description	Calculated Qty	Contractor	Reorder Level	Target Level	Order Quantity	Reorder Method
------------	-----	------	-------------	----------------	------------	---------------	--------------	----------------	----------------

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10) Click the 'Generate' button to generate the Purchase Orders.



AIM Inventory Reorder Generator AIM.TRAINER About Help Logout

**Generate** Delete Edit New Search Browse

Generation Errors

INVENTORY REORDER GENERATION FOR END USER TRAINING GUIDES

End Date

Warehouse [DGS\\_STOREROOM1](#)  
DGS SUPPLY & SURPLUS WAREHOUSE

Class

Commodity

Item

Start Bin

End Bin

Cycle Code

Contractor

Address Code

Method

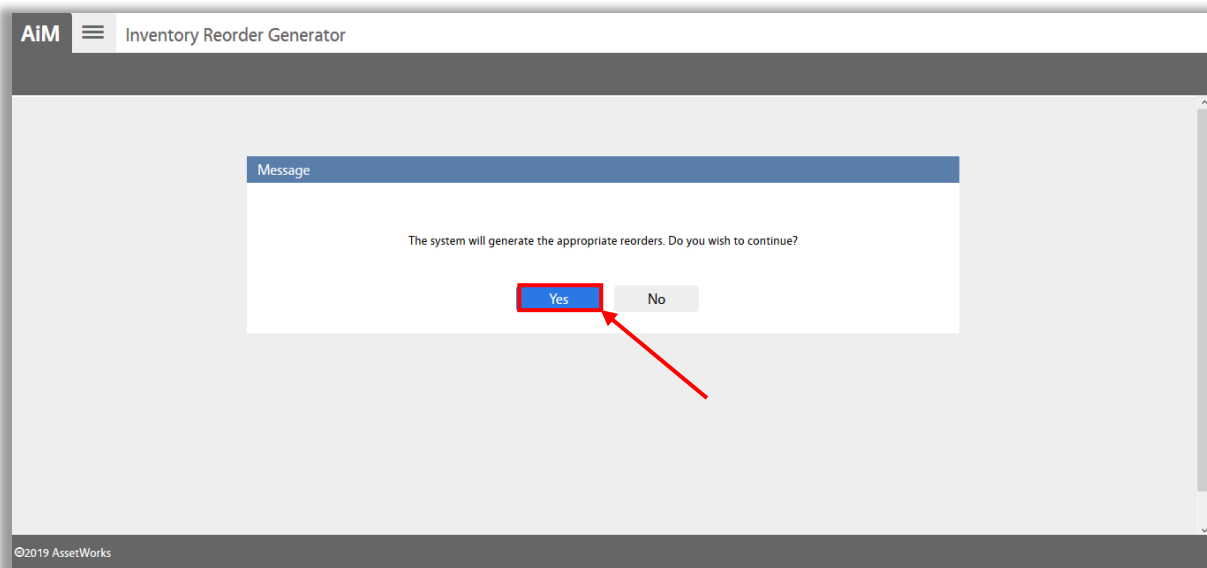
Preference

**Parts**

Preference	Bin	Part	Description	Calculated Qty	Contractor	Reorder Level	Target Level	Order Quantity	Reorder Method
1	A123-456	V12345	VALVE, GATE, FULL PORT, THREADED	0.0000	HOME DEPOT 002	5.0000	25.0000	25.0000	Purchase Order

Record 1 of 2 Go First Previous Next Last

11) Information note appears. Click the 'Yes' button.




AIM Inventory Reorder Generator

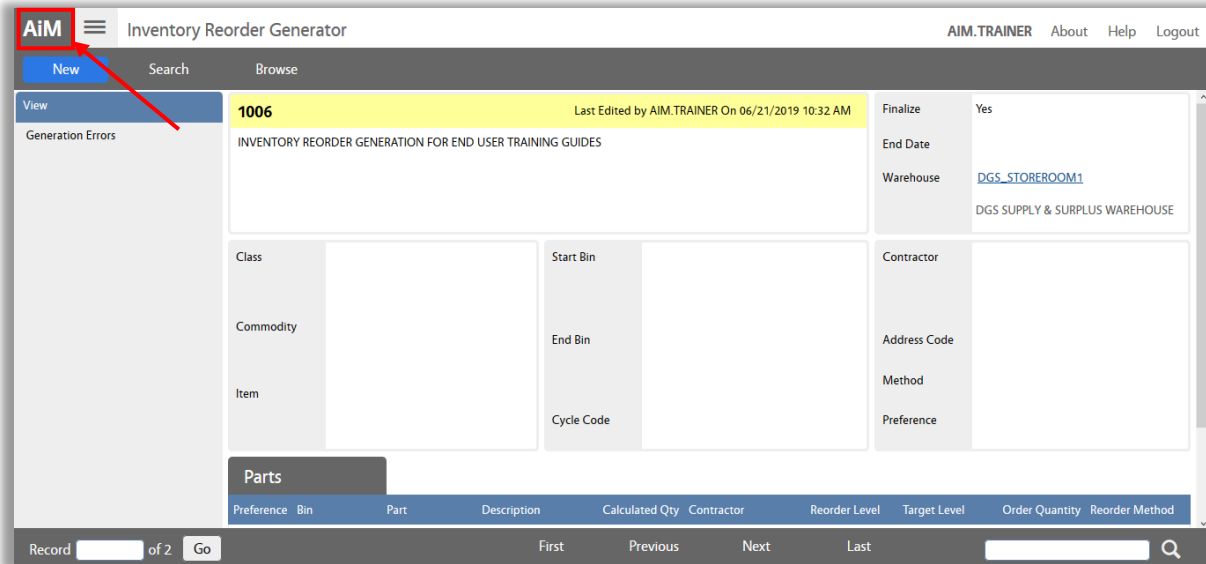
Message

The system will generate the appropriate reorders. Do you wish to continue?

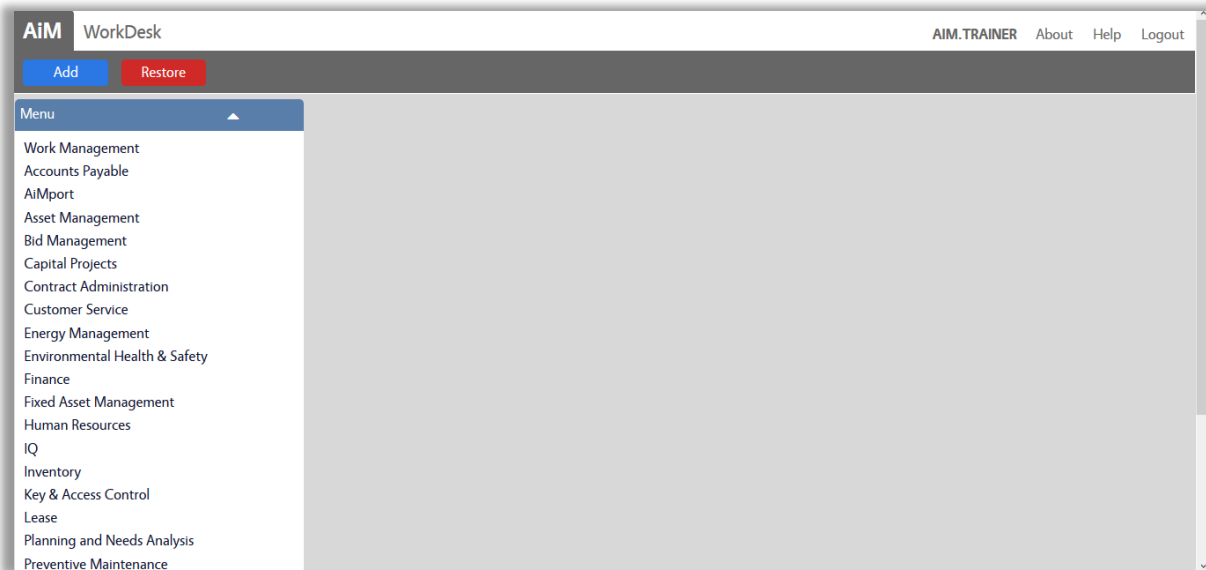
**Yes** No

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12) Click the AiM™  logo to return to the main Work Desk.



13) The main Work Desk. The Process is complete.



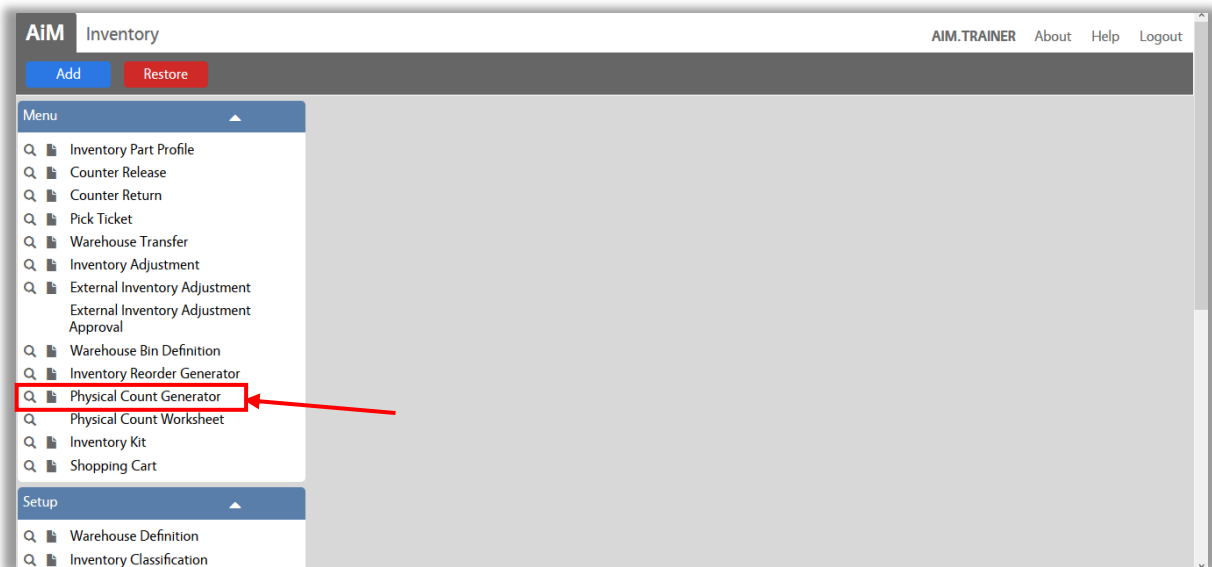
### Physical Count Generation

This method is used to create a Physical Count.

- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click the 'Physical Count Generator' link.



- 3) Click the 'New' Button

**AIM** Physical Count Generator AIM.TRAINER About Help Logout

**New** Search

Created By On  
Last Edited by On

Warehouse

End Date

Start Bin

End Bin

Cycle Code

Class

Commodity

Item

Bins to Count

Bins per Set

Sets Generated

**Physical Set**

Set	Count Sequence	Warehouse	Start Bin	End Bin	Total Bins	Status
-----	----------------	-----------	-----------	---------	------------	--------

4) Add a detailed description in the Description box.

**AIM** Physical Count Generator AIM.TRAINER About Help Logout

**Save** **Cancel**

**1005** Created By AIM.TRAINER On 06/21/2019 10:38 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:38 AM

Warehouse

End Date

Start Bin

End Bin

Cycle Code

Class

Commodity

Item

Bins to Count


Bins per Set

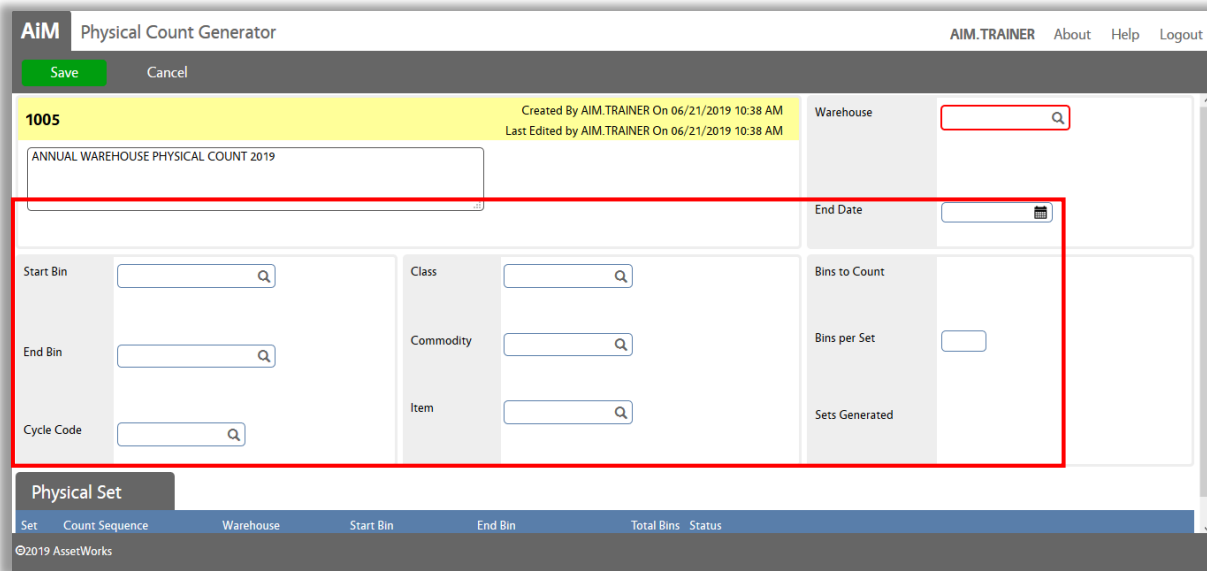
Sets Generated

**Physical Set**


Set	Count Sequence	Warehouse	Start Bin	End Bin	Total Bins	Status
-----	----------------	-----------	-----------	---------	------------	--------

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- 5) Optional: Click the 'End Date' Calendar Icon . Select the appropriate Date. You can also choose to count only certain Bins or Class/Commodity/Items by using the associated filters.

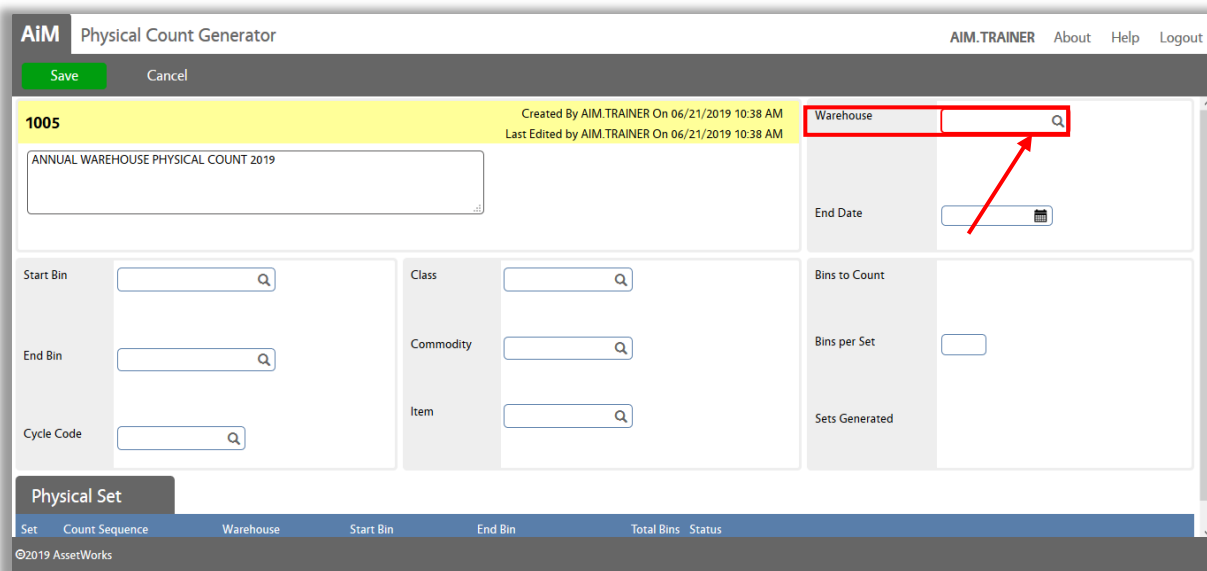


The screenshot shows the 'Physical Count Generator' form. A red box highlights the filters section, which includes the following fields:

- Start Bin:
- End Bin:
- Cycle Code:
- Class:
- Commodity:
- Item:
- End Date:  
- Bins to Count:
- Bins per Set:
- Sets Generated:

The form also includes a 'Warehouse' field at the top right, a 'Save' button, and a 'Cancel' button. The title bar shows 'AiM Physical Count Generator' and the user 'AIM.TRAINER'.

- 6) Click the Warehouse 'Zoom'  icon.



The screenshot shows the 'Physical Count Generator' form. A red box highlights the 'Warehouse' field, and a red arrow points to the 'Zoom' icon (a magnifying glass) next to it. The form also includes the 'End Date' field with a calendar icon, and the same filter fields as in the previous screenshot.

- 7) Select the appropriate Warehouse by clicking the associated link.

AiM Warehouse

Done Search Cancel

Warehouse #	Description
DGS_STOREROOM1	DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FORSTER

Page 1 of 1 Go Display: 25 First Previous Next Last Records Found = 1

- 8) Click the 'Save' button.

AiM Physical Count Generator

AIM.TRAINER About Help Logout

Save Cancel

1005 Created By AIM.TRAINER On 06/21/2019 10:38 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:38 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Warehouse: DGS\_STOREROOM1  
DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FORSTER

End Date: [Calendar Icon]

Start Bin: [Search] Class: [Search]  
End Bin: [Search] Commodity: [Search]  
Cycle Code: [Search] Item: [Search]

Bins to Count: [Search]  
Bins per Set: [Search]  
Sets Generated: [Search]

Physical Set

Set	Count Sequence	Warehouse	Start Bin	End Bin	Total Bins	Status
-----	----------------	-----------	-----------	---------	------------	--------

©2019 AssetWorks

- 9) Click the 'Generate' button to generate the Physical Count Worksheet(s).

**Physical Count Generator**

AIM:TRAINER About Help Logout

**Generate** Delete Edit New Search Browse

Action: [Email](#)

**1005** Created By AIM:TRAINER On 06/21/2019 10:38 AM  
Last Edited by AIM:TRAINER On 06/21/2019 10:46 AM

Warehouse: [DGS\\_STOREROOM1](#)  
DGS SUPPLY & SURPLUS

End Date:

Start Bin: End Bin: Class: Commodity: Item:

Cycle Code:

Bins to Count: 8  
Bins per Set:  
Sets Generated: 0

**Physical Set**

Set	Count Sequence	Warehouse	Start Bin	End Bin	Total Bins	Status
-----	----------------	-----------	-----------	---------	------------	--------

10) The Physical Count Worksheet is generated.

**Physical Count Generator**

AIM:TRAINER About Help Logout

**Generate** Delete Edit New Search Browse

Action: [Email](#)

**1005** Created By AIM:TRAINER On 06/21/2019 10:38 AM  
Last Edited by AIM:TRAINER On 06/21/2019 10:46 AM

Warehouse: [DGS\\_STOREROOM1](#)  
DGS SUPPLY & SURPLUS WAREHOUSE

End Date:


Start Bin: End Bin: Class: Commodity: Item:

Cycle Code:

Bins to Count: 8  
Bins per Set:  
Sets Generated: 1

**Physical Set**

Set	Count Sequence	Warehouse	Start Bin	End Bin	Total Bins	Status
1	1	DGS_STOREROOM1	A123-456	T-9	8	GENERATED

11) Click the AiM™  logo to return to the main Work Desk.

**Physical Count Generator**

AIM TRAINER About Help Logout

Generate Delete Edit New Search Browse

Action: [Email](#)

**1005** Created By AIM.TRAINER On 06/21/2019 10:38 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:46 AM

Warehouse: [DGS\\_STOREROOM1](#)  
DGS SUPPLY & SURPLUS WAREHOUSE

End Date

Start Bin: End Bin: Cycle Code:

Class: Commodity: Item:

Bins to Count: 8  
Bins per Set:  
Sets Generated: 1

**Physical Set**

Set	Count Sequence	Warehouse	Start Bin	End Bin	Total Bins	Status
1	1	DGS_STOREROOM1	A123-456	T-9	8	GENERATED

12) The main Work Desk. The Process is complete.

**WorkDesk**

AIM.TRAINER About Help Logout

Add Restore

Menu

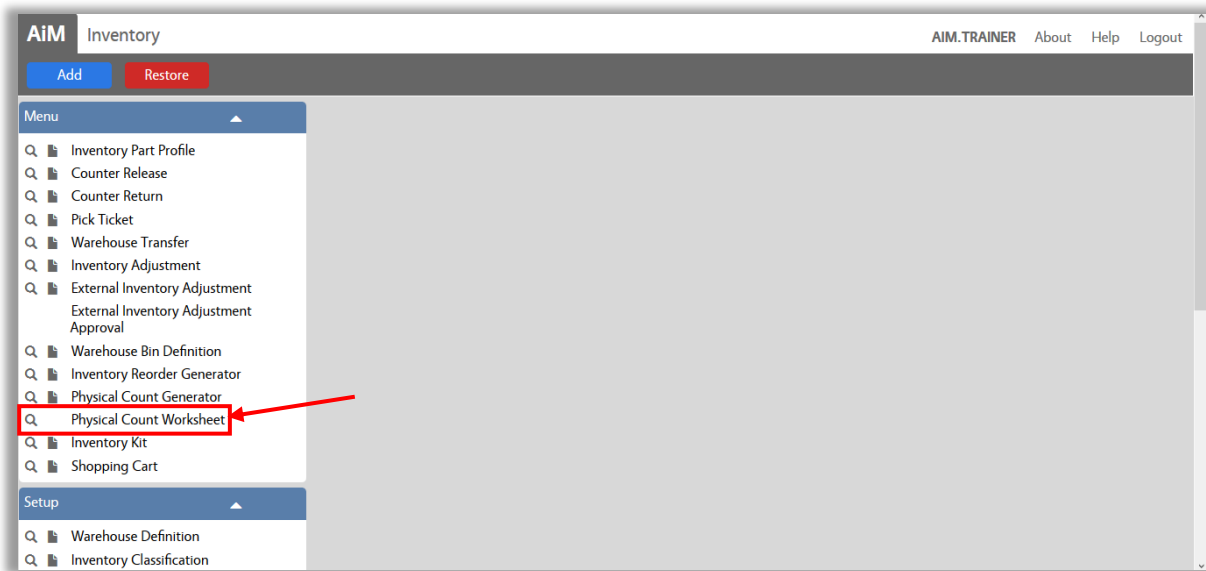
- Work Management
- Accounts Payable
- AIMport
- Asset Management
- Bid Management
- Capital Projects
- Contract Administration
- Customer Service
- Energy Management
- Environmental Health & Safety
- Finance
- Fixed Asset Management
- Human Resources
- IQ
- Inventory
- Key & Access Control
- Lease
- Planning and Needs Analysis
- Preventive Maintenance

**Review and Approve Physical Count Worksheets.**  
This method is used to process a Physical Count Worksheets.

- 1) From the main WorkDesk, click the Inventory module link.



- 2) From the Inventory module main WorkDesk, click the 'Physical Count Worksheet' link.



- 3) Click the 'Search' icon.

**AiM** Physical Count Worksheet AIM.TRAINER About Help Logout

Search Browse

Created By On  
Last Edited by On

Status  
Transaction  
Warehouse  
Count Sequence

Schedule Date Bin Part UOM Count Date Counted By Item Count Recount

Search

4) Click 'Execute'. Note: enter any appropriate search criteria to narrow down the search results.

**AiM** Physical Count Worksheet AIM.TRAINER About Logout

Execute Advanced Search Reset

Action  
New Query  
View

Display Order Sort Operator

Transaction - =  
Set - =  
Description - contains

Status - = FINALIZED  
Warehouse - =  
Count Sequence - =  
Edit Date - =  
Editor - =

Notes Log Select

Operator

Sequence =  
Record ID =  
Note Type =  
Notes contains

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5) Select the Count Worksheet you wish to review/approve.

**AiM** Physical Count Worksheet AIM.TRAINER About Logout

[Search](#)

Action	Transaction #	Description	Status	Set	Count Sequence	Warehouse	Cycle Code	Class	Commodity	Item
<a href="#">Export</a>	<b>1005</b>	ANNUAL WAREHOUSE PHYSICAL COUNT 2019	FINALIZED	1	1	DGS_STOREROOM1				
<a href="#">View</a>										

Page **1** of 1 [Go](#) Display: 25 [First](#) [Previous](#) [Next](#) [Last](#) Records Found = 1

6) Click the 'Edit' icon.

**AiM** Physical Count Worksheet AIM.TRAINER About Help Logout

[Edit](#) [Search](#) [Browse](#)

Action	Transaction #	Description	Status	Set	Count Sequence	Warehouse	Cycle Code	Class	Commodity	Item
<a href="#">Email</a>	<b>1</b>	ANNUAL WAREHOUSE PHYSICAL COUNT 2019	FINALIZED	1	1	DGS_STOREROOM1				
<a href="#">Print</a>										
<a href="#">View</a>										
<a href="#">Notes Log</a>										
<a href="#">Status History</a>										

Created By AIM.TRAINER On 06/21/2019 10:47 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:59 AM

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRAINER	1.0000	1.0000	\$0.00	Yes
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRAINER	3.0000	-16.0000	\$(79.84)	No
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, LUTRON, 120V,	EA	Jun 21, 2019	AIM.TRAINER	4.0000	2.0000	\$175.50	No

Record **1** of 1 [Go](#) [First](#) [Previous](#) [Next](#) [Last](#)

7) Review the counts, note the adjustment value for any changes between the expected count and the actual count.

**AiM** Physical Count Worksheet AIM.TRAINER About Help Logout

Save Cancel

**View**

Notes Log

[Status History](#)

**1** Created By AIM.TRAINER On 06/21/2019 10:47 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:59 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Status: FINALIZED Q

Transaction: 1005

Warehouse: DGS\_STOREROOM1

Count Sequence: 1

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S20648-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRAINER	1.0000	1.0000	0	<input checked="" type="checkbox"/>
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRAINER	3.0000	-16.0000	-79.84	<input type="checkbox"/>
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, ...	EA	Jun 21, 2019	AIM.TRAINER	4.0000	2.0000	175.5	<input type="checkbox"/>

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8) Mark any bins for recount as appropriate.

**AiM** Physical Count Worksheet AIM.TRAINER About Help Logout

Save Cancel

**View**

Notes Log

[Status History](#)

**1** Created By AIM.TRAINER On 06/21/2019 10:47 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:59 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Status: FINALIZED Q

Transaction: 1005

Warehouse: DGS\_STOREROOM1

Count Sequence: 1

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S20648-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRAINER	1.0000	1.0000	0	<input checked="" type="checkbox"/>
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRAINER	3.0000	-16.0000	-79.84	<input type="checkbox"/>
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, ...	EA	Jun 21, 2019	AIM.TRAINER	4.0000	2.0000	175.5	<input type="checkbox"/>

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9) Select the status zoom icon.

**AiM Physical Count Worksheet**

AIM.TRainer About Help Logout

Save Cancel

View

Notes Log  
[Status History](#)

1 Created By AIM.TRainer On 06/21/2019 10:47 AM  
Last Edited by AIM.TRainer On 06/21/2019 10:59 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Transaction: 1005  
Warehouse: DGS\_STOREROOM1  
DGS SUPPLY & SURPLUS  
Count Sequence: 1

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRainer	1.0000	1.0000	0	<input checked="" type="checkbox"/>
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRainer	3.0000	-16.0000	-79.84	<input type="checkbox"/>
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, (VETRO-1000)	EA	Jun 21, 2019	AIM.TRainer	4.0000	2.0000	175.5	<input type="checkbox"/>

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10) Select the 'Approved' status.

**AiM Physical Count Status**

Done Search Show All Cancel

Status	Description
CANCELED	CANCELED
APPROVED	APPROVED

Page 1 of 1 Go Display: 10 First Previous Next Last Records Found = 2

11) Click the 'Save' icon.

**Save** Cancel

**View**  
Notes Log  
[Status History](#)

**1** Created By AIM.TRAINER On 06/21/2019 10:47 AM  
Last Edited by AIM.TRAINER On 06/21/2019 10:59 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRAINER	1.0000	1.0000	0	<input checked="" type="checkbox"/>
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRAINER	3.0000	-16.0000	-79.84	<input type="checkbox"/>
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, LUTRON, 120V,	EA	Jun 21, 2019	AIM.TRAINER	4.0000	2.0000	175.5	<input type="checkbox"/>

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12) The Inventory adjustments have been made. If any Bins were marked for recount, an additional Count Sheet has been generated.

**Search** Browse

**Action**  
[Email](#)  
[Print](#)

**View**  
Notes Log  
[Status History](#)

**1** Created By AIM.TRAINER On 06/21/2019 10:47 AM  
Last Edited by AIM.TRAINER On 06/21/2019 11:06 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRAINER	1.0000	1.0000	\$0.00	Yes
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRAINER	3.0000	-16.0000	<span style="color: red;">\$(79.84)</span>	No
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, LUTRON, 120V,	EA	Jun 21, 2019	AIM.TRAINER	4.0000	2.0000	\$175.50	No

Record 1 of 1 Go First Previous Next Last

13) Click the AiM Icon to return to the main WorkDesk.

**AiM** Physical Count Worksheet AIM.TRAINER About Help Logout

Search Browse

**Action**  
Email  
Print

**View**  
Notes Log  
Status History

**1** Created By AIM.TRAINER On 06/21/2019 10:47 AM  
Last Edited by AIM.TRAINER On 06/21/2019 11:06 AM

ANNUAL WAREHOUSE PHYSICAL COUNT 2019

Status: APPROVED  
Transaction: 1005  
Warehouse: DGS\_STOREROOM1  
Count Sequence: 1  
DGS SUPPLY & SURPLUS

Schedule Date	Bin	Part	UOM	Count Date	Counted By	Item Count	Adjustment	Adjustment Value	Recount
Jun 21, 2019	A123-456	V12345 - VALVE, GATE, FULL PORT, THREADED (VELAN S20648-02TY) CLASS 8	EACH	Jun 21, 2019	AIM.TRAINER	1.0000	1.0000	\$0.00	Yes
Jun 21, 2019	A3-22	0032 - GLOVES, LEATHER, THERMAL LINED - LARGE (PAIR)	EA	Jun 21, 2019	AIM.TRAINER	3.0000	-16.0000	\$ (79.84)	No
Jun 21, 2019	A7-2	3039 - BALLAST, DIMMING, LUTRON, 120V,	EA	Jun 21, 2019	AIM.TRAINER	4.0000	2.0000	\$175.50	No

Record 1 of 1 Go First Previous Next Last

14) The main WorkDesk, the process is complete.

**AiM** WorkDesk AIM.TRAINER About Help Logout

Add Restore

**Menu**

- Work Management
- Accounts Payable
- AiMport
- Asset Management
- Bid Management
- Capital Projects
- Contract Administration
- Customer Service
- Energy Management
- Environmental Health & Safety
- Finance
- Fixed Asset Management
- Human Resources
- IQ
- Inventory
- Key & Access Control
- Lease
- Planning and Needs Analysis
- Preventive Maintenance

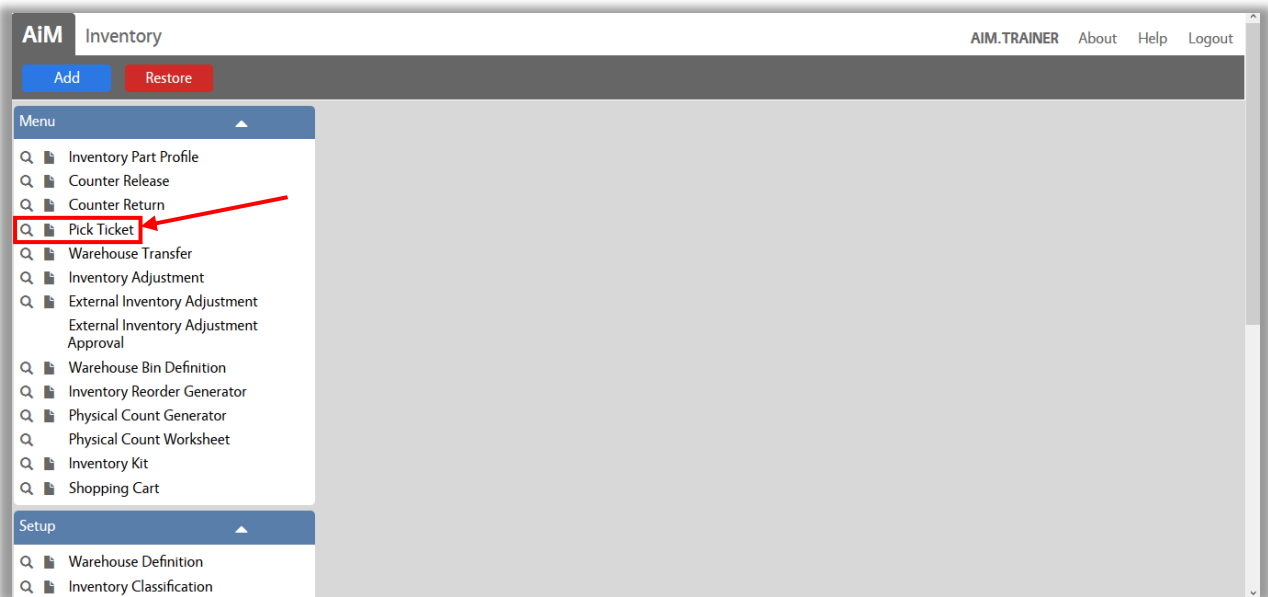
## Pick Ticket

This method is used to create a Pick Ticket from a finalized Purchase Request.

- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click the 'Pick Ticket' link.



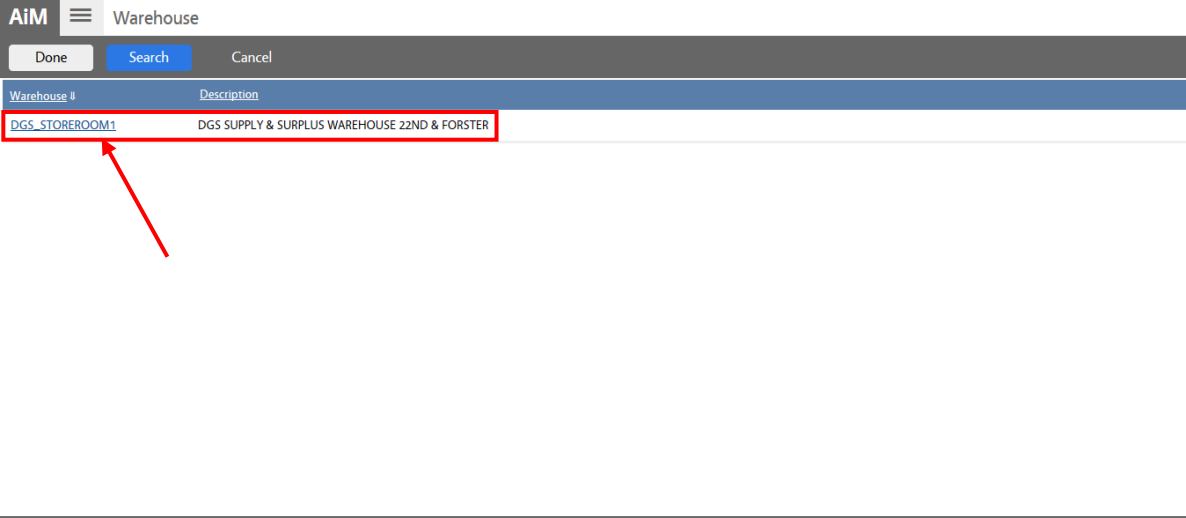
- 3) Click 'New' button.

The screenshot shows the 'Pick Ticket' form in the AssetWorks IWMS application. The 'New' button is highlighted with a red box, and a red arrow points to it. The form includes fields for 'Created By', 'On', 'Last Edited by', 'On', 'Status', 'Warehouse', 'Date Needed', 'Work Order', 'Region', 'Facility', 'Property', 'Location', and 'Phase'.

4) Select the appropriate Warehouse. Click the Warehouse zoom icon to search.

The screenshot shows the 'Pick Ticket' form in the AssetWorks IWMS application. The 'Warehouse' field is highlighted with a red box, and a red arrow points to it. The form includes fields for 'Status', 'Date Needed', 'Work Order', 'Region', 'Facility', 'Property', 'Location', and 'Phase'.

5) Select the Warehouse ID.



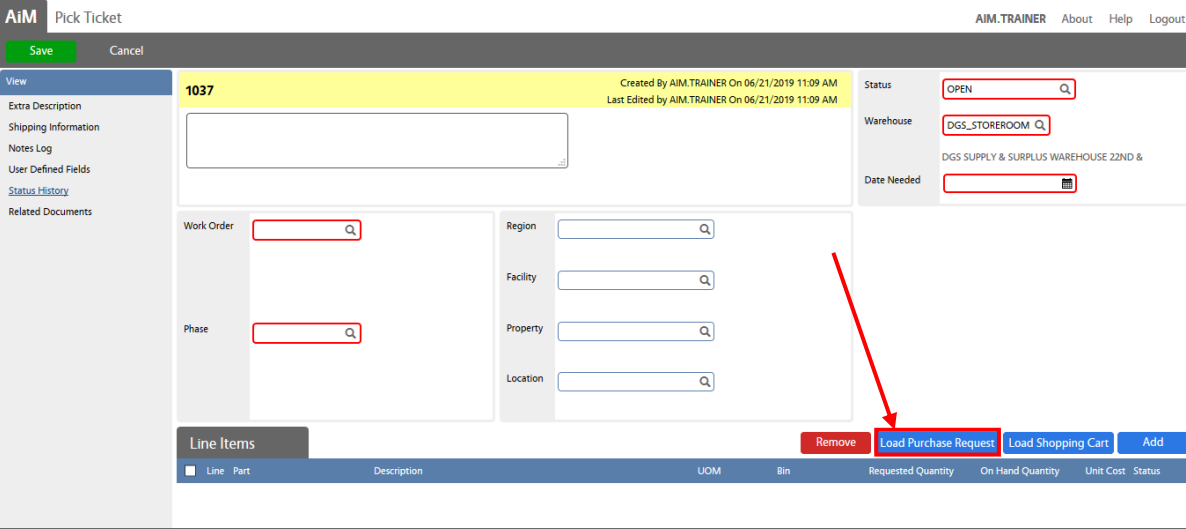
**AiM** Warehouse

Done Search Cancel

Warehouse #	Description
DGS_STOREROOM1	DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FORSTER

Page 1 of 1 Go Display: 25 First Previous Next Last Records Found = 1

6) Click the 'Load Purchase Request' button to load finalized Purchase Requests for this warehouse.



**AiM** Pick Ticket AIM.TRAINER About Help Logout

Save Cancel

**1037** Created By AIM.TRAINER On 06/21/2019 11:09 AM  
Last Edited by AIM.TRAINER On 06/21/2019 11:09 AM

Status: OPEN Warehouse: DGS\_STOREROOM Date Needed: [Calendar Icon]

Work Order: [Search] Region: [Search]  
Phase: [Search] Facility: [Search]  
Property: [Search]  
Location: [Search]

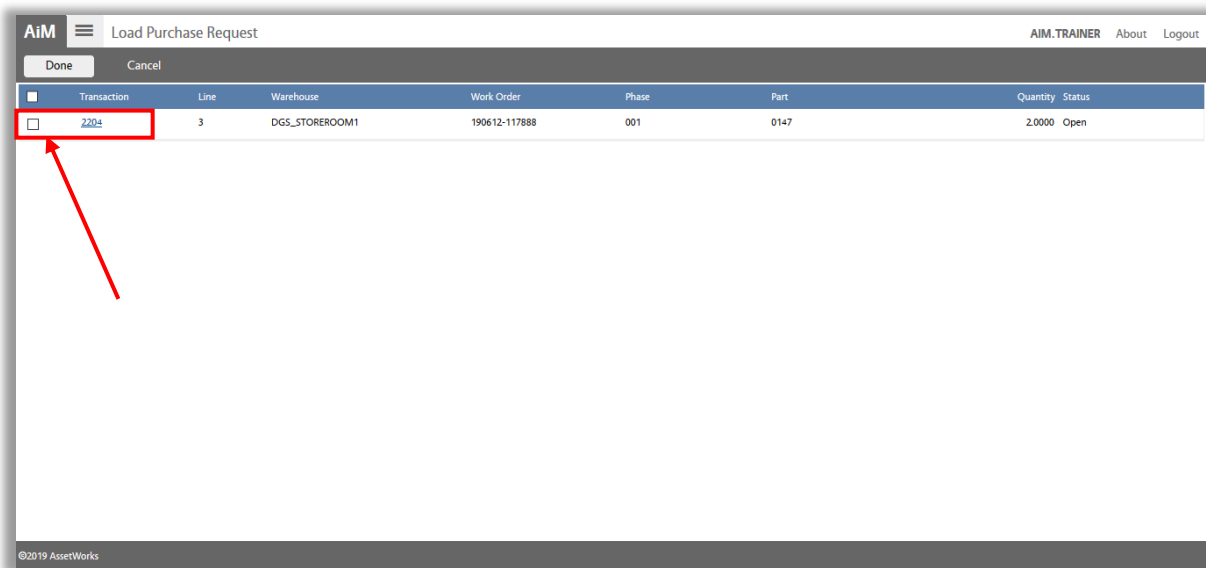
Line Items

Line	Part	Description	UOM	Bin	Requested Quantity	On Hand Quantity	Unit Cost	Status
------	------	-------------	-----	-----	--------------------	------------------	-----------	--------

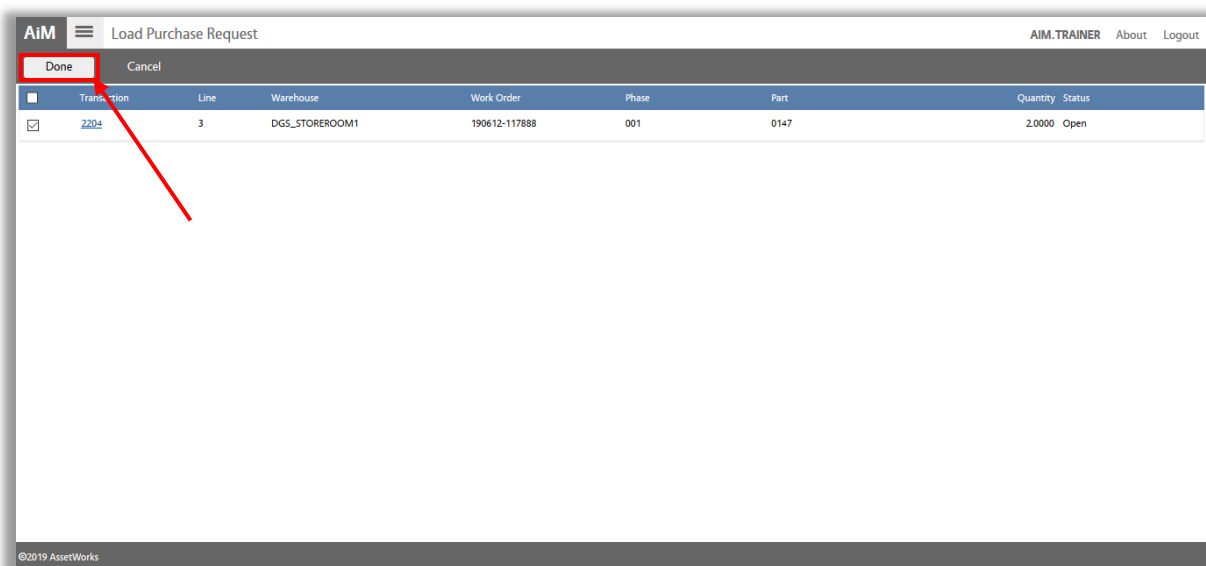
Remove Load Purchase Request Load Shopping Cart Add

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7) Check the box next to the Purchase Request(s) you wish to load.



8) Click the 'Done' button.



9) Note: When loading a Purchase Request, the related fields are automatically populated.

**AiM Pick Ticket** AIM.TRAINER About Help Logout

**1037** Created By AIM.TRAINER On 06/21/2019 11:09 AM  
Last Edited By AIM.TRAINER On 06/21/2019 11:09 AM

Status:

Warehouse: DGS\_STOREROOM1  
DGS SUPPLY & SURPLUS WAREHOUSE 22ND &

Date Needed:

**PURCHASE REQUEST FOR END USER TRAINING GUIDE CREATION**

Work Order: 190612-117888  
MATT'S TEST WORK ORDER 6-12-2019

Phase: 001  
MATT'S TEST WORK ORDER 6-12-2019

Region:   
PENNSYLVANIA

Facility:   
HARRISBURG-CAPCMPLX

Property:   
CAPITOL BUILDING (REGION 2)

Location:

**Line Items** Remove Load Purchase Request Load Shopping Cart Add

Line	Part	Description	UOM	Bin	Requested Quantity	On Hand Quantity	Unit Cost	Status
1	0147	PLASTIC, MOBILE SHRINK WRAP	EA	88-15	2.0000	3.0000	\$36.1300	Open

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10) Click the corresponding line item(s) and enter the 'Drawn Quantity'.

**AiM Pick Ticket** AIM.TRAINER About Help Logout

**1037** Created By AIM.TRAINER On 06/21/2019 11:09 AM  
Last Edited By AIM.TRAINER On 06/21/2019 11:09 AM

Status:

Warehouse: DGS\_STOREROOM1  
DGS SUPPLY & SURPLUS WAREHOUSE 22ND &

Date Needed:

**PURCHASE REQUEST FOR END USER TRAINING GUIDE CREATION**

Work Order: 190612-117888  
MATT'S TEST WORK ORDER 6-12-2019

Phase: 001  
MATT'S TEST WORK ORDER 6-12-2019

Region:   
PENNSYLVANIA

Facility:   
HARRISBURG-CAPCMPLX

Property:   
CAPITOL BUILDING (REGION 2)

Location:

**Line Items** Remove Load Purchase Request Load Shopping Cart Add

Line	Part	Description	UOM	Bin	Requested Quantity	On Hand Quantity	Unit Cost	Status
1	0147	PLASTIC, MOBILE SHRINK WRAP	EA	88-15	2.0000	3.0000	\$36.1300	Open

©2019 AssetWorks

11) Select the appropriate Pick Ticket Status. Click the Status zoom icon.

The screenshot shows the 'AiM Pick Ticket' form. The 'Status' field is highlighted with a red box and contains the value 'OPEN'. A red arrow points to the 'Status' field. The form also displays a 'Warehouse' field with the value 'DGS\_STOREROOM1' and a 'Date Needed' field with the value 'Jun 14, 2019 12:00 AM'. The 'Line Items' table at the bottom shows a single item: 'PLASTIC, MOBILE SHRINK WRAP' with a quantity of 2,000.

Line	Part	Description	UOM	Bin	Requested Quantity	On Hand Quantity	Unit Cost	Status
1	0147	PLASTIC, MOBILE SHRINK WRAP	EA	B8-15	2,000	3,000	\$36.1300	Open

12) Choose the appropriate Pick Ticket status.

The screenshot shows the 'AiM Pick Ticket Status' selection screen. The 'Status' field is highlighted with a red box and contains the value 'DRAWN'. A red arrow points to the 'Status' field. The screen displays a list of status options: 'OPEN', 'DRAWN', 'CANCELED', and 'CLOSED'. The 'DRAWN' option is selected.

Status	Description
OPEN	OPEN PICK TICKET
<b>DRAWN</b>	DRAWN
CANCELED	CANCELED
CLOSED	CLOSED PICK TICKET

13) Click the 'Save' button to save the record.

**AiM** Pick Ticket AIM.TRAINER About Help Logout

**Save** Cancel

**1037** Created By AIM.TRAINER On 06/21/2019 11:09 AM  
Last Edited by AIM.TRAINER On 06/21/2019 11:09 AM

Status:

Warehouse: DGS\_STOREROOM1  
DGS SUPPLY & SURPLUS WAREHOUSE 22ND &

Date Needed:

Work Order: 190612-117888  
MATT'S TEST WORK ORDER 6-12-2019

Phase: 001  
MATT'S TEST WORK ORDER 6-12-2019

Region:   
PENNSYLVANIA

Facility:   
HARRISBURG-CAPCMPLX

Property:   
CAPITOL BUILDING (REGION 2)

Location:

**Line Items**

Line	Part	Description	UOM	Bin	Requested Quantity	On Hand Quantity	Unit Cost	Status
1	0147	PLASTIC, MOBILE SHRINK WRAP	EA	B8-15	2.0000	3.0000	\$36.1300	Open

©2019 AssetWorks

14) Click the AiM logo to return to the main WorkDesk.

**AiM** Pick Ticket AIM.TRAINER About Help Logout

**Edit** New Search Browse

**1037** Created By AIM.TRAINER On 06/21/2019 11:09 AM  
Last Edited by AIM.TRAINER On 06/21/2019 11:26 AM

Status: [DRAWN](#)

Warehouse: [DGS\\_STOREROOM1](#)  
DGS SUPPLY & SURPLUS WAREHOUSE 22ND &

Date Needed: Jun 14, 2019 12:00 AM

Work Order: [190612-117888](#)  
MATT'S TEST WORK ORDER 6-12-2019

Phase: [001](#)  
MATT'S TEST WORK ORDER 6-12-2019

Region: [PA](#)  
PENNSYLVANIA

Facility: [HBURG-CAPCMPLX](#)  
HARRISBURG-CAPCMPLX

Property: [CAPITOL BLD](#)  
CAPITOL BUILDING (REGION 2)

Location:

**Line Items**

Line	Part	Description	UOM	Bin	Requested Quantity	On Hand Quantity	Unit Cost	Status
1	0147	PLASTIC, MOBILE SHRINK WRAP	EA	B8-15	2.0000	3.0000	\$36.1300	Open

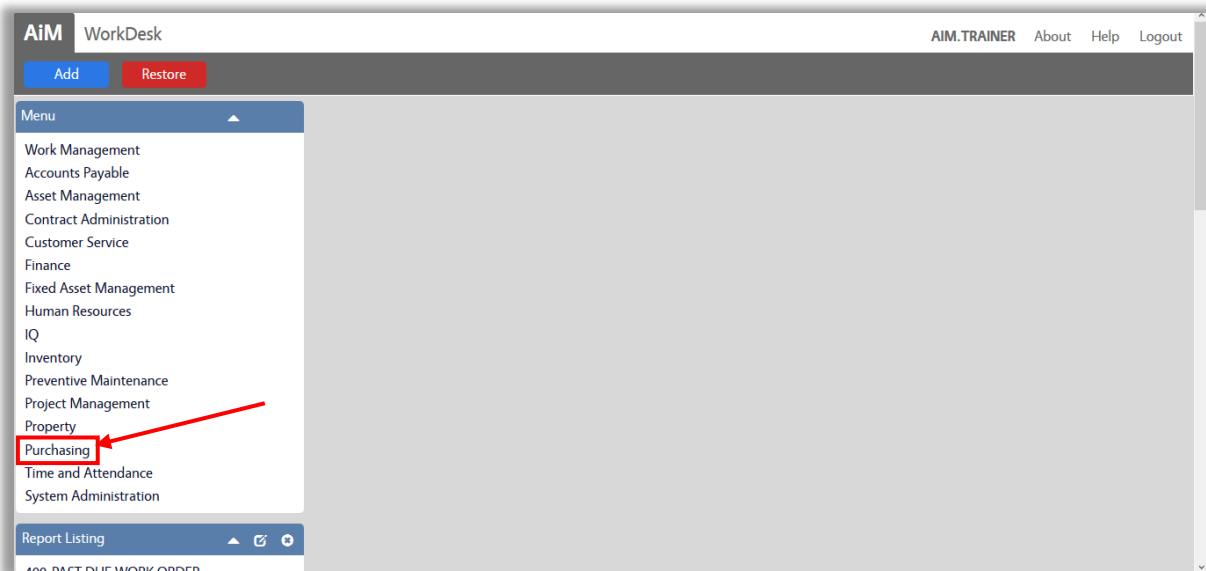
15) The main WorkDesk, the process is complete.



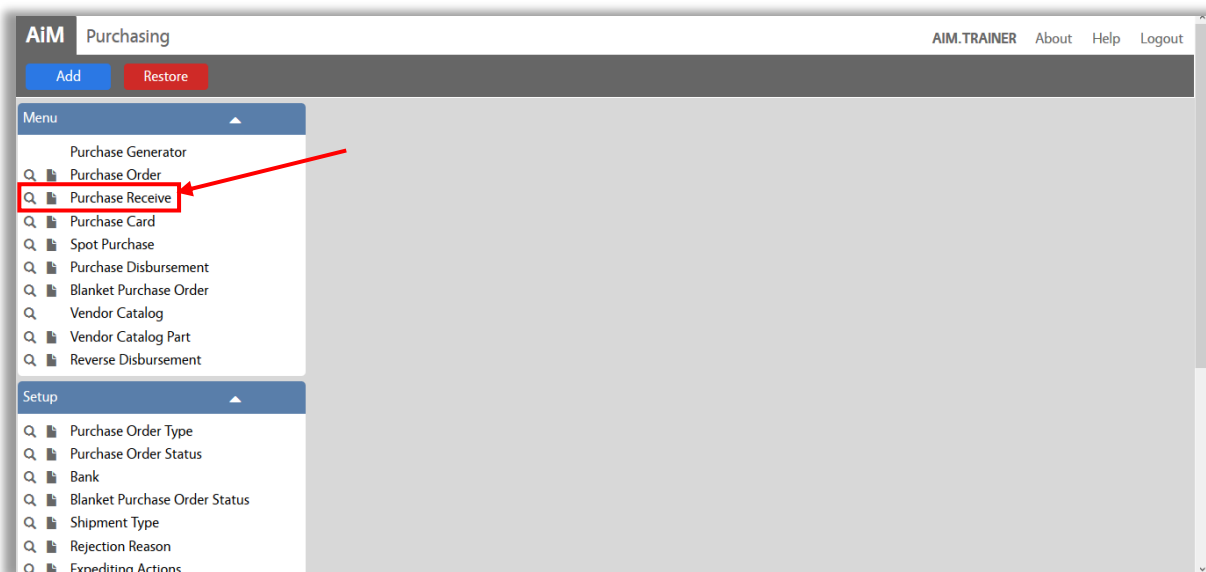
## Purchase Receive

This method is used to receive a purchase in AiM.

- 1) Login to AiM™ and click the 'Purchasing' link from the menu channel.



- 2) From the Purchasing module main WorkDesk, click the 'Purchase Receive' link.



3) Click 'New'

The screenshot shows the 'Purchase Receive' form in the AiM system. The 'New' button is highlighted with a red box and a red arrow pointing to it. The form includes fields for Contractor, Address Code, Blanket Number, Contact, Warehouse, Shipment Type, Ordered By, Reference Number, Status, PO Code, Type, Received By, Date Received, Packing Slip, and Packing Slip Date. A 'Line Item' tab is visible at the bottom.

4) Click 'Execute' to search for an eligible Purchase Order. Note: Enter search criteria to find a specific record.

The screenshot shows the 'Purchase Order' search form in the AiM system. The 'Execute' button is highlighted with a red box and a red arrow pointing to it. The form includes a table with columns for Action, Field, Operator, and Value. The 'Execute' button is highlighted with a red box and a red arrow pointing to it. The form includes a table with columns for Action, Field, Operator, and Value.

Action	Field	Operator	Value
New Query	Purchase Order	=	
View	PO Code	=	
	Description	contains	INVENTORY REORDER
	Contractor	=	
	Address Code	=	
	Blanket Number	=	
	Contact	=	
	Warehouse	=	
	Shipment Type	=	
	Ordered By	=	
	Editor	=	
	Edit Date	=	

- 5) Select the Purchase Order record you wish to receive items for.

The screenshot shows the AIM Purchase Order interface. At the top, there's a header with 'AIM' and a menu icon. Below it, a search bar contains 'Purchase Order'. A table lists one record with 'Purchase Order' in the first column and 'AUTOMATED INVENTORY REORDER' in the second. The ID '000001013' is highlighted in a red box, with a red arrow pointing to it. At the bottom, a footer shows 'Page 1 of 1', 'Go', 'Display: 25', and navigation buttons: 'First', 'Previous', 'Next', 'Last'. It also states 'Records Found = 1'.

- 6) Note the line items for the Purchase Order you are receiving. To receive in partial, click into the line item and adjust the receive amount. If you wish to only receive certain items and not all of them, you may also put a check in the box next to items you wish to remove, and click the 'Remove' button.

The screenshot shows the AIM Purchase Receive interface. The top header includes 'AIM', 'Purchase Receive', and user information 'AIM.TRAINER About Help Logout'. Below the header, there are 'Save' and 'Cancel' buttons. The main area is divided into several sections. On the left, a sidebar lists 'View', 'Extra Description', 'Shipping Information', 'Notes Log', 'Status History', and 'Related Documents'. The central part displays details for PO '1013', including 'Created By', 'Last Edited by', 'Status' (OPEN), 'PO Code' (1013), 'Type' (SAP), 'Contractor' (HOME DEPOT), 'Warehouse' (DGS\_STOREROOM), 'Received By' (AIM.TRAINER), 'Date Received' (Jun 21, 2019), and 'Packing Slip'. At the bottom, a 'Line Item' table is shown with columns: Line, PO Line, Vendor Part, Inventory Part, Description, UOM, Ordered, Received, Accepted, and Prior Received. A single line item is listed with a checkbox, Line 1, PO Line 1, Vendor Part 1234567890, Inventory Part V12345, Description VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8, UOM EACH, Ordered 25.0000, Received 25.0000, Accepted 25.0000, and Prior Received 0.0000. A 'Remove' button is at the end of the table.

- 7) Once you are ready to process the receive, click the status zoom icon and select the appropriate status.

**Purchase Receive**

AIM.TRAINER About Help Logout

Save Cancel

View

Extra Description  
Shipping Information  
Notes Log  
[Status History](#)  
Related Documents

**1013** Created By AIM.TRAINER On 06/21/2019 03:35 PM  
Last Edited by AIM.TRAINER On 06/21/2019 03:35 PM

AUTOMATED INVENTORY REORDER

Contractor HOME DEPOT  
HOME DEPOT  
Address Code 902  
Blanket Number  
Contact

Warehouse DGS\_STOREROOM  
DGS SUPPLY & SURPLUS WAREHOUSE 22ND &  
Shipment Type  
Ordered By  
Reference Number

Status OPEN  
PO Code 1013  
Type AUTOMATED INVENTORY REORDER  
SAP PURCHASE ORDER

Received By AIM.TRAINER  
Date Received Jun 21, 2019  
Packing Slip  
Packing Slip Date

Line Item

Line	PO Line	Vendor Part	Inventory Part	Description	UOM	Ordered	Received	Accepted	Prior Received
1	1	1234567890	V12345	VALVE, GATE, FULL PORT, THREADED (VELAN 52064B-02TY) CLASS 8	EACH	25.0000	25.0000	25.0000	0.0000

Remove

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- 8) Select the 'Finalized' status to finalize the Purchase Order.

**Purchase Receive Status**

Done Search Show All Cancel

Status	Description
<a href="#">OPEN</a>	OPEN PURCHASE RECEIVE
<b>FINALIZED</b>	FINALIZED PURCHASE RECEIVE
<a href="#">CLOSED</a>	CLOSED PURCHASE RECEIVE
<a href="#">CANCELED</a>	CANCELED PURCHASE RECEIVE

9) Click 'Save'.

**Purchase Receive**

AIM. TRAINER About Help Logout

**Save** Cancel

**1013** Created By AIM. TRAINER On 06/21/2019 03:35 PM  
Last Edited by AIM. TRAINER On 06/21/2019 03:35 PM

Status: **FINALIZED**

PO Code: **1013**  
AUTOMATED INVENTORY REORDER

Type: **SAP**  
SAP PURCHASE ORDER

Received By: **AIM. TRAINER**

Date Received: **Jun 21, 2019**

Packing Slip:

Packing Slip Date:

Contractor: **HOME DEPOT**

Warehouse: **DGS\_STOREROOM**

Shipment Type:

Ordered By:

Reference Number:

Address Code: **902**

Blanket Number:

Contact:

**Line Item**

Line	PO Line	Vendor Part	Inventory Part	Description	UOM	Ordered	Received	Accepted	Prior Received
1	1	1234567890	V12345	VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8	EACH	25.0000	25.0000	25.0000	0.0000

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10) The Purchase Receive is complete, click the AiM icon to return to the main WorkDesk.

**AiM** Purchase Receive

AIM. TRAINER About Help Logout

**Edit** New Search

**1013** Created By AIM. TRAINER On 06/21/2019 03:35 PM  
Last Edited by AIM. TRAINER On 06/21/2019 03:47 PM

Status: **FINALIZED**

PO Code: **1013**  
AUTOMATED INVENTORY REORDER

Type: **SAP**  
SAP PURCHASE ORDER

Received By: **AIM. TRAINER**

Date Received: **Jun 21, 2019**

Packing Slip:

Packing Slip Date:

Contractor: **HOME DEPOT**

Warehouse: **DGS\_STOREROOM1**

Shipment Type:

Ordered By:

Reference Number:

Address Code: **902**

Blanket Number:

Contact:

**Line Item**

Line	PO Line	Vendor Part	Inventory Part	Description	UOM	Ordered	Received	Accepted	Prior Received
1	1	1234567890	V12345	VALVE, GATE, FULL PORT, THREADED (VELAN S2064B-02TY) CLASS 8	EACH	25.0000	25.0000	25.0000	0.0000

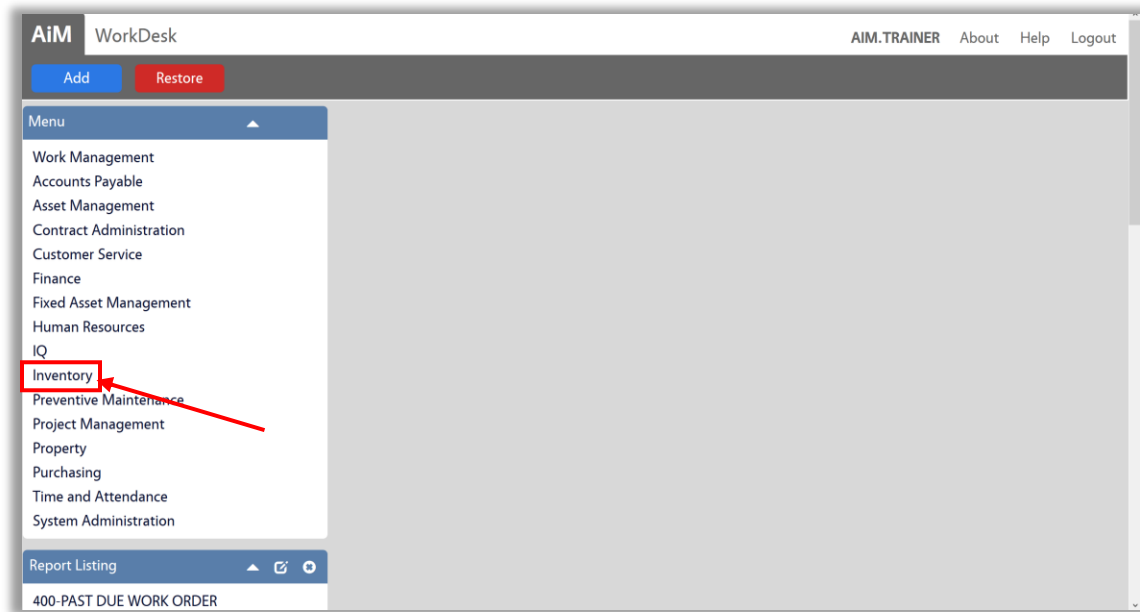
11) The main WorkDesk, the process is complete.



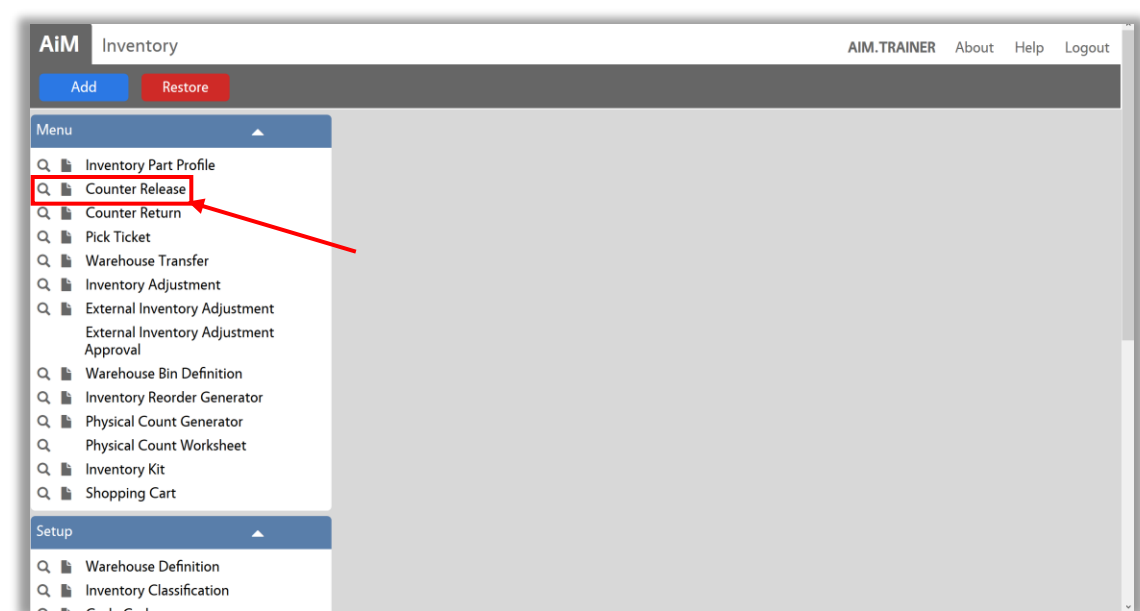
## Counter Release

This method is used to Process an Inventory Counter Release.

- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click the 'Counter Release' link.



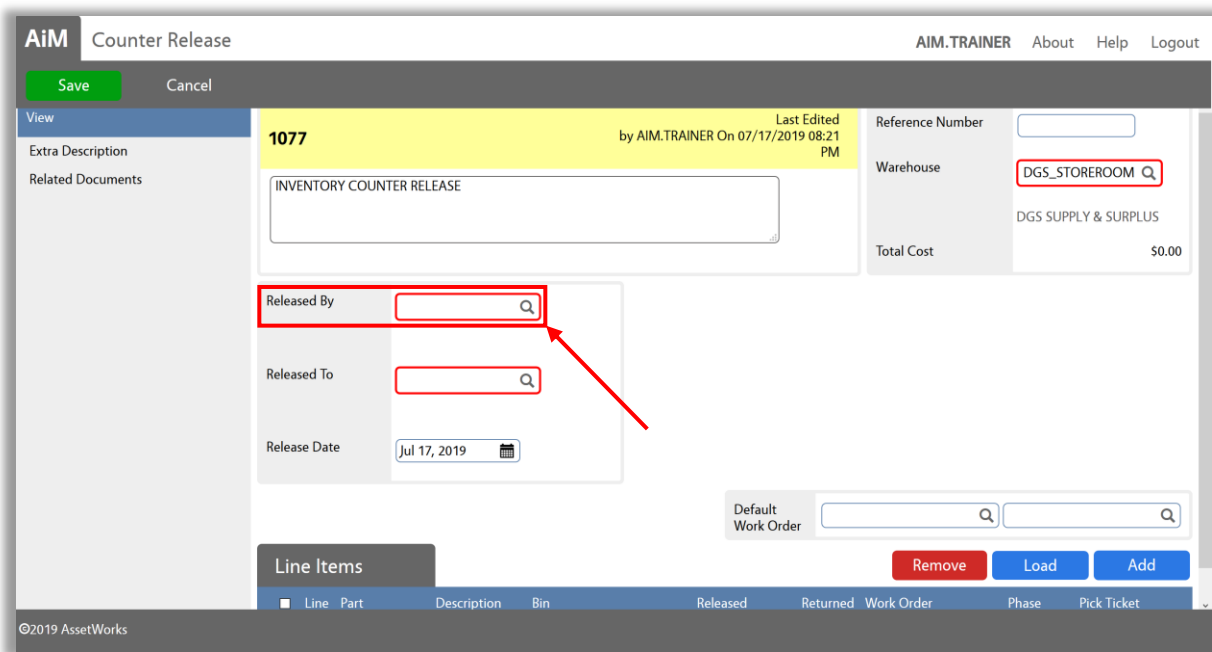
3) Click the 'New' button.

The screenshot shows the 'AiM Counter Release' form. The 'New' button is highlighted with a red box, and a red arrow points to it. The form includes fields for 'Reference Number', 'Warehouse', and 'Total Cost' (displaying \$0.00). There are also fields for 'Released By', 'Released To', and 'Release Date'. A 'Line Items' table is visible at the bottom with columns: Line, Part, Description, Bin, Released, Returned, Work Order, Phase, and Pick Ticket. The top navigation bar includes 'AIM', 'Counter Release', 'AIM.TRAINER', 'About', 'Help', and 'Logout'.

4) Add a detailed Description.

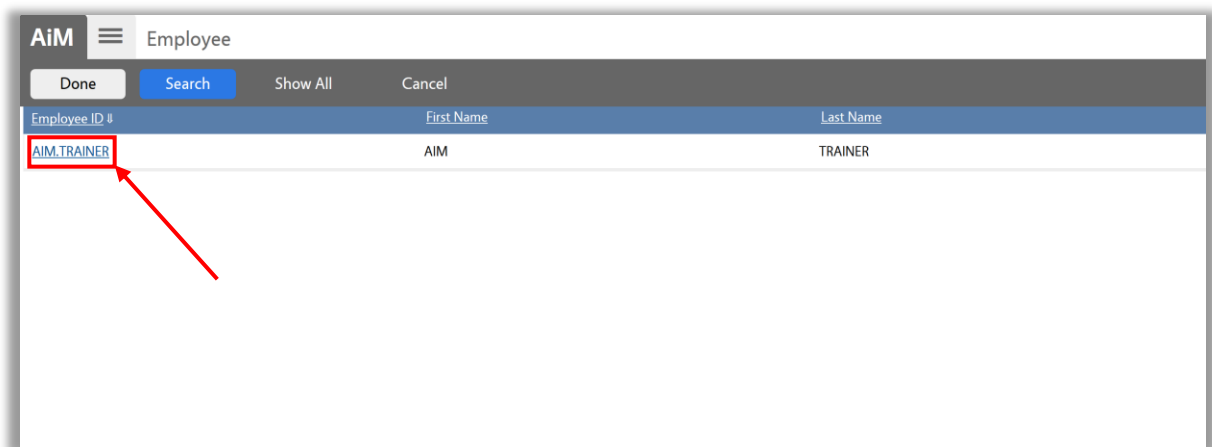
The screenshot shows the 'AiM Counter Release' form with the '1077' ID. A red box highlights the description field, and a red arrow points to it. The form includes fields for 'Reference Number', 'Warehouse' (displaying 'DGS\_STOREROOM'), and 'Total Cost' (displaying \$0.00). There are also fields for 'Released By', 'Released To', and 'Release Date' (displaying 'Jul 17, 2019'). A 'Line Items' table is visible at the bottom with columns: Line, Part, Description, Bin, Released, Returned, Work Order, Phase, and Pick Ticket. The top navigation bar includes 'AiM', 'Counter Release', 'AIM.TRAINER', 'About', 'Help', and 'Logout'. The bottom left corner shows '©2019 AssetWorks'.

- 5) Click the 'Released By' Zoom  icon.




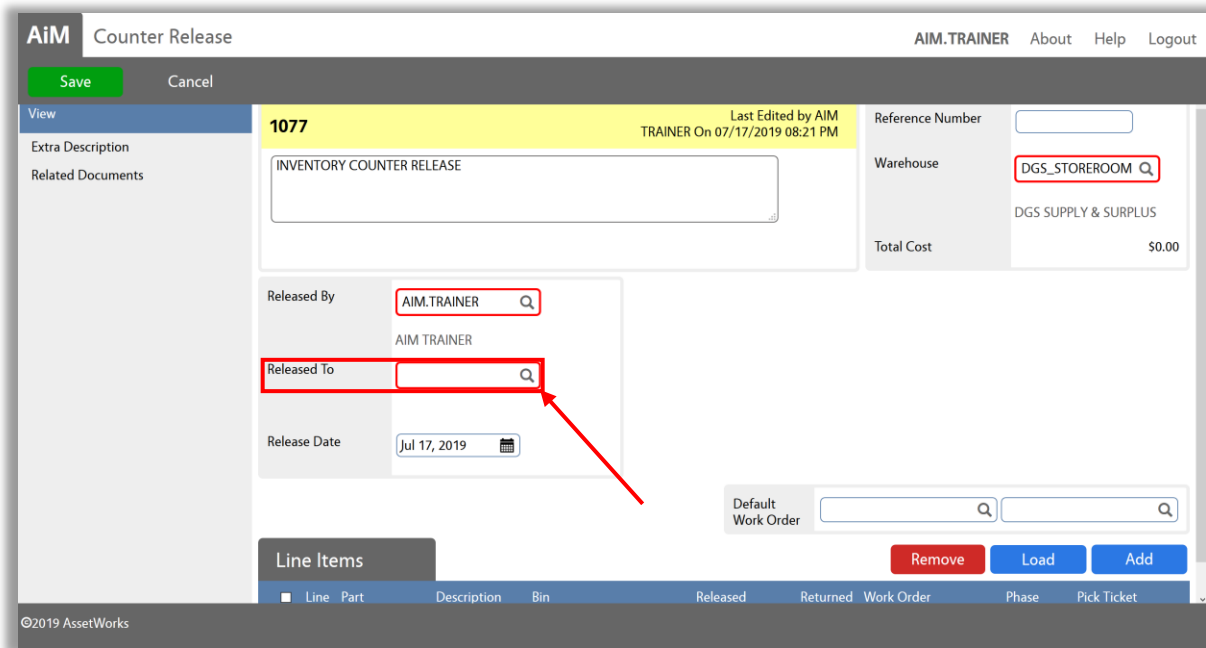
*Note: The only employee's shown in the selection list are assigned to the Warehouse.*

- 6) Select the appropriate Employee. Click the associated 'Employee ID' link.



Employee ID #	First Name	Last Name
AIM.TRAINER	AIM	TRAINER

- 7) Click the 'Released To' Zoom  icon. Follow the prompts.



**AiM Counter Release**

AIM.TRAINER About Help Logout

Save Cancel

View

Extra Description

Related Documents

**1077** Last Edited by AIM TRAINER On 07/17/2019 08:21 PM

INVENTORY COUNTER RELEASE

Reference Number


Warehouse **DGS\_STOREROOM**

DGS SUPPLY & SURPLUS

Total Cost \$0.00

Released By **AIM.TRAINER**

AIM TRAINER

Released To 

Release Date Jul 17, 2019

Default Work Order

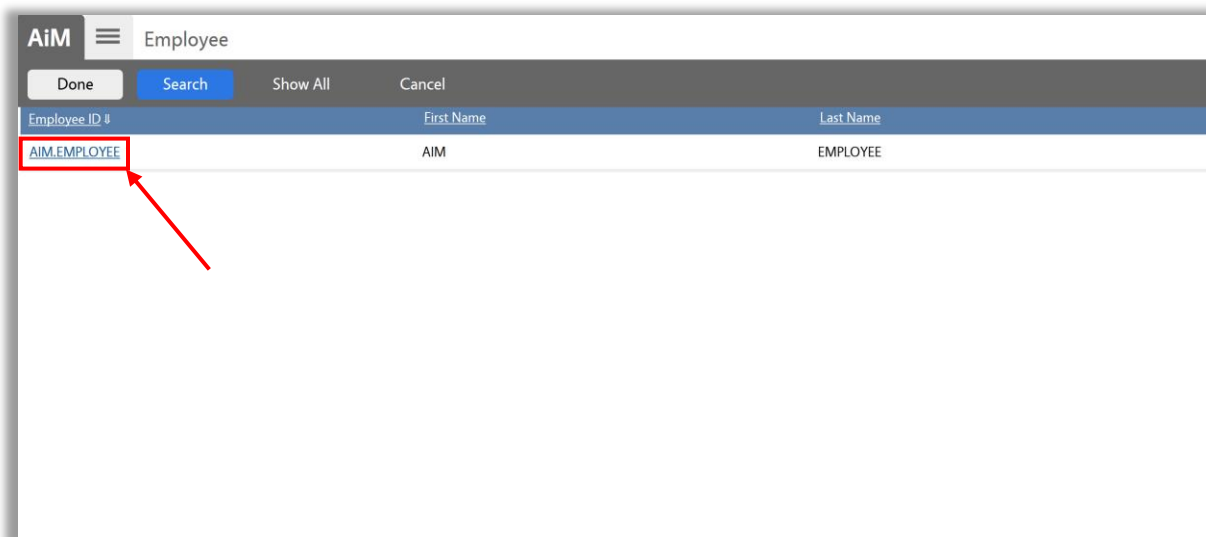
Remove Load Add

Line Items

Line	Part	Description	Bin	Released	Returned	Work Order	Phase	Pick Ticket
------	------	-------------	-----	----------	----------	------------	-------	-------------

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- 8) Select the employee by clicking the associated 'Employee ID' link.

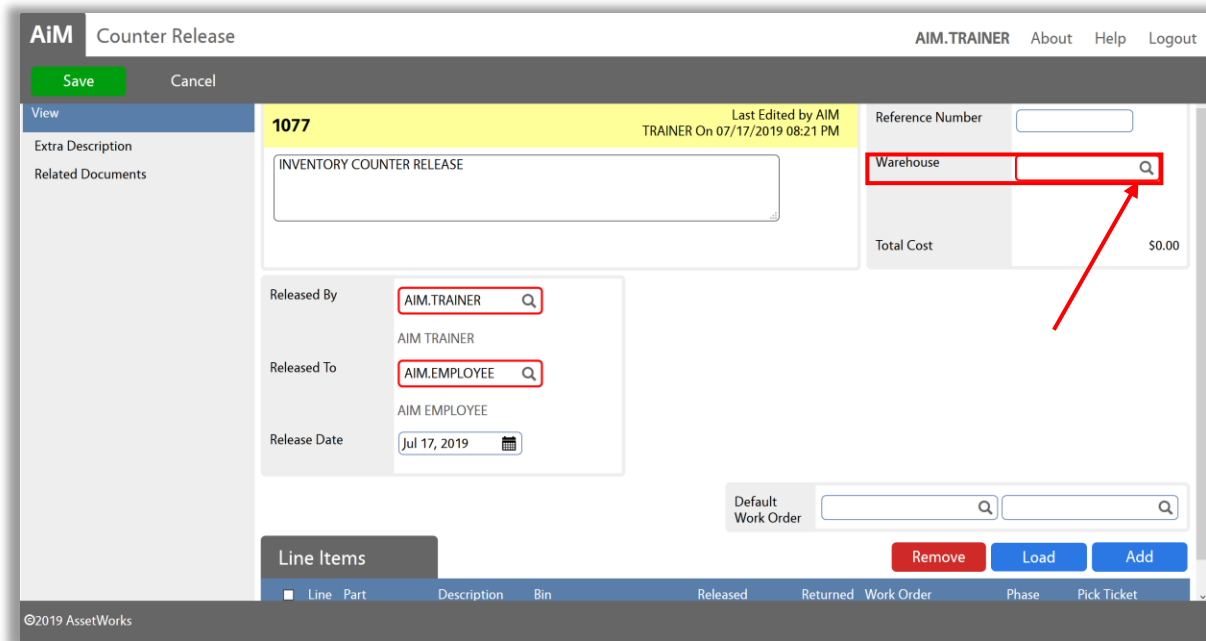


**AiM Employee**

Done Search Show All Cancel

Employee ID	First Name	Last Name
<b>AIM.EMPLOYEE</b>	AIM	EMPLOYEE

9) Click the 'Warehouse' the Zoom  icon. *Note: This may Autopopulate.*



**AiM Counter Release**

AIM.TRainer About Help Logout

Save Cancel

View

Extra Description

Related Documents

**1077** Last Edited by AIM TRAINER On 07/17/2019 08:21 PM

Reference Number

Warehouse

Total Cost \$0.00

Released By AIM.TRainer

Released To AIM.EMPLOYEE

Release Date Jul 17, 2019

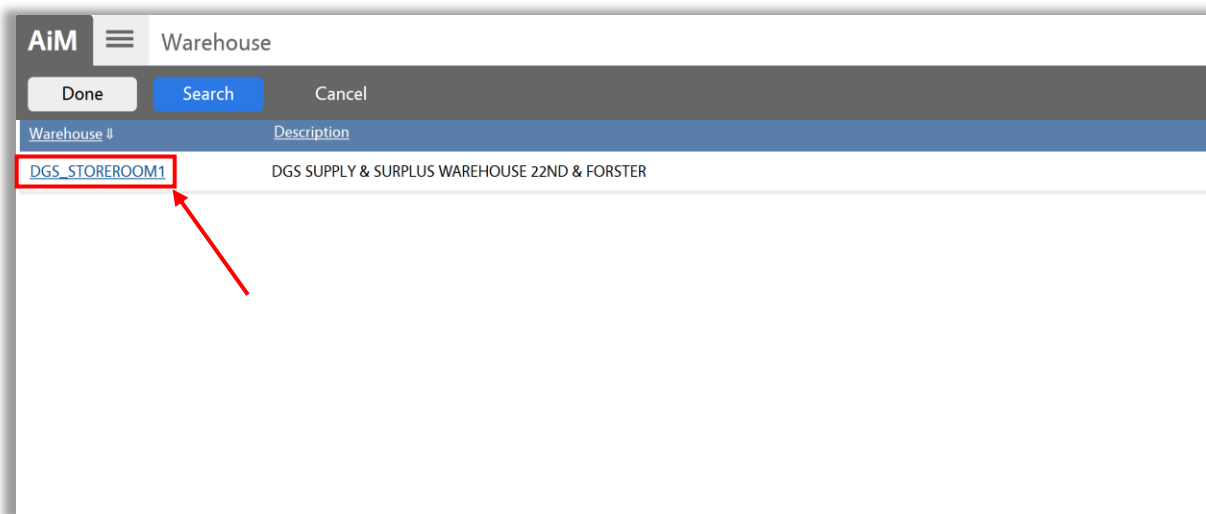
Default Work Order

Line Items

Remove Load Add

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10) Select the appropriate 'Warehouse' by clicking the associated link.



**AiM Warehouse**

Done Search Cancel

Warehouse	Description
DGS_STOREROOM1	DGS SUPPLY & SURPLUS WAREHOUSE 22ND & FORSTER

- 11) Click the 'Load' button. *Note: you may also click the 'Add' button if you are creating a release from scratch.*

The screenshot shows the 'Counter Release' form in the AiM system. The form is titled 'Counter Release' and shows a release number '1077'. It includes fields for 'Released By' (AIM.TRAINER), 'Released To' (AIM.EMPLOYEE), and 'Release Date' (Jul 17, 2019). A red arrow points to the 'Load' button in the bottom right corner of the form.

- 12) Click 'Execute' to find eligible Pick Tickets. *Note: You can enter search criteria to find specific records.*

The screenshot shows the 'Load Pick Tickets' form in the AiM system. The form has a search criteria section with fields for Transaction, Description, Work Order, Phase, Region, Facility, Property, and Location. A red arrow points to the 'Execute' button in the top left corner of the form.

13) Select a Pick Ticket you wish to release. Check the box next to the appropriate Pick Ticket record(s).

**AiM** Load Pick Tickets AIM.TRAINER About Logout

**Done** **Cancel**

	Transaction	Line	Work Order	Phase	Part	Bin	Requested Quantity	Drawn Quantity	Released Quantity
<input checked="" type="checkbox"/>	<a href="#">1022</a>	1	190612-117889	001	3039	A7-2	10.0000	8.0000	0.0000
<input type="checkbox"/>	<a href="#">1028</a>	1	190612-117884	001	3039	A7-2	2.0000	0.0000	0.0000
<input type="checkbox"/>	<a href="#">1028</a>	2	190612-117884	001	3058	S-40A	2.0000	2.0000	0.0000
<input type="checkbox"/>	<a href="#">1030</a>	1	190612-117885	001	3058	S-40A	1.0000	0.0000	0.0000
<input type="checkbox"/>	<a href="#">1030</a>	2	190612-117885	001	0032	A3-22	4.0000	4.0000	0.0000
<input type="checkbox"/>	<a href="#">1047</a>	1	190712-117907	001	0826	A-2	6.0000	6.0000	0.0000
<input type="checkbox"/>	<a href="#">1048</a>	1	190712-117907	001	1612	B1-36C	5.0000	5.0000	0.0000
<input type="checkbox"/>	<a href="#">1048</a>	2	190712-117907	001	1624	B1-36B	3.0000	3.0000	0.0000
<input type="checkbox"/>	<a href="#">1058</a>	1	190712-117907	001	1567	A-12B	8.0000	8.0000	0.0000
<input type="checkbox"/>	<a href="#">1058</a>	2	190712-117907	001	1561	A6-16	4.0000	4.0000	0.0000

14) Click the 'Done' button.

**AiM** Load Pick Tickets AIM.TRAINER About Logout

**Done** **Cancel**

	Transaction	Line	Work Order	Phase	Part	Bin	Requested Quantity	Drawn Quantity	Released Quantity
<input checked="" type="checkbox"/>	<a href="#">1022</a>	1	190612-117889	001	3039	A7-2	10.0000	8.0000	0.0000
<input type="checkbox"/>	<a href="#">1028</a>	1	190612-117884	001	3039	A7-2	2.0000	0.0000	0.0000
<input type="checkbox"/>	<a href="#">1028</a>	2	190612-117884	001	3058	S-40A	2.0000	2.0000	0.0000
<input type="checkbox"/>	<a href="#">1030</a>	1	190612-117885	001	3058	S-40A	1.0000	0.0000	0.0000
<input type="checkbox"/>	<a href="#">1030</a>	2	190612-117885	001	0032	A3-22	4.0000	4.0000	0.0000
<input type="checkbox"/>	<a href="#">1047</a>	1	190712-117907	001	0826	A-2	6.0000	6.0000	0.0000
<input type="checkbox"/>	<a href="#">1048</a>	1	190712-117907	001	1612	B1-36C	5.0000	5.0000	0.0000
<input type="checkbox"/>	<a href="#">1048</a>	2	190712-117907	001	1624	B1-36B	3.0000	3.0000	0.0000
<input type="checkbox"/>	<a href="#">1058</a>	1	190712-117907	001	1567	A-12B	8.0000	8.0000	0.0000
<input type="checkbox"/>	<a href="#">1058</a>	2	190712-117907	001	1561	A6-16	4.0000	4.0000	0.0000

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15) Note the Released quantity, this is defaulted from the 'Drawn' amount on the pick ticket.


The screenshot shows the 'AiM Counter Release' form. The 'Released' quantity in the 'Line Items' table is highlighted with a red box and a red arrow pointing to it. The 'Released' column shows a value of 8.0000 for Line 1, Part 3039.

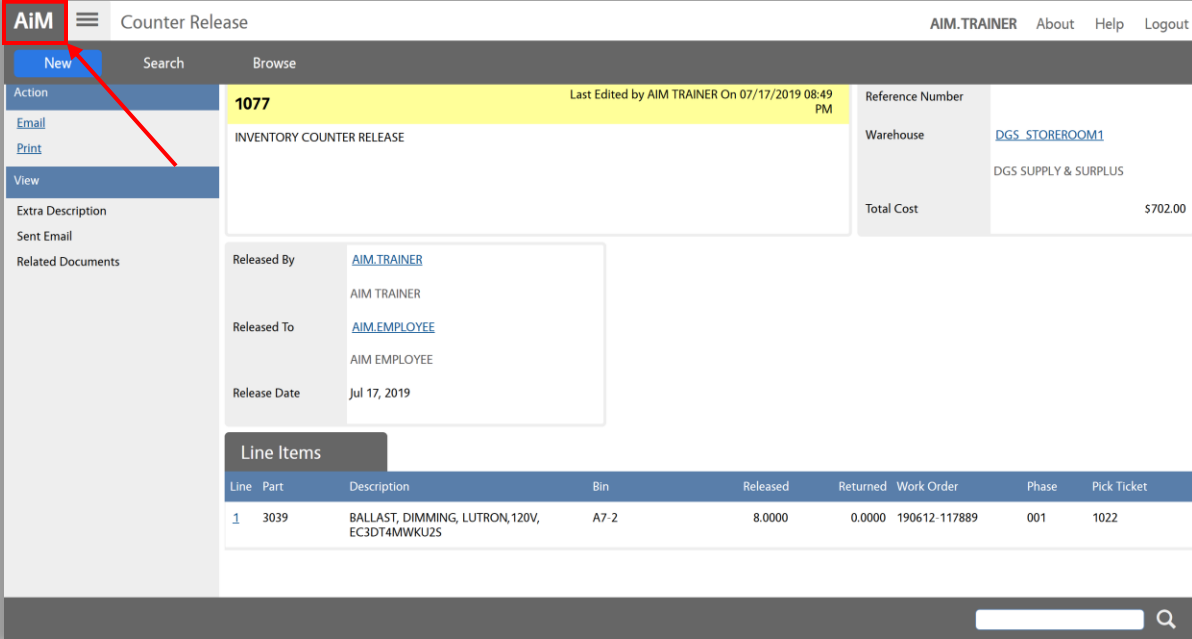
Line	Part	Description	Bin	Released	Returned	Work Order	Phase	Pick Ticket
1	3039	BALLAST, DIMMING, LUTRON, 120V, EC3DT4MWKU2S	A7-2	8.0000	0.0000	190612-117889	001	1022

16) Click the 'Save' button to finalize the release.

The screenshot shows the 'AiM Counter Release' form with the 'Save' button highlighted by a red box and a red arrow pointing to it. The 'Released' quantity in the 'Line Items' table is also visible.

Line	Part	Description	Bin	Released	Returned	Work Order	Phase	Pick Ticket
1	3039	BALLAST, DIMMING, LUTRON, 120V, EC3DT4MWKU2S	A7-2	8.0000	0.0000	190612-117889	001	1022

17) Click the AiM™  logo to return to the main Work Desk.



**AiM** Counter Release AIM.TRAINER About Help Logout

New Search Browse

**1077** Last Edited by AIM TRAINER On 07/17/2019 08:49 PM

INVENTORY COUNTER RELEASE

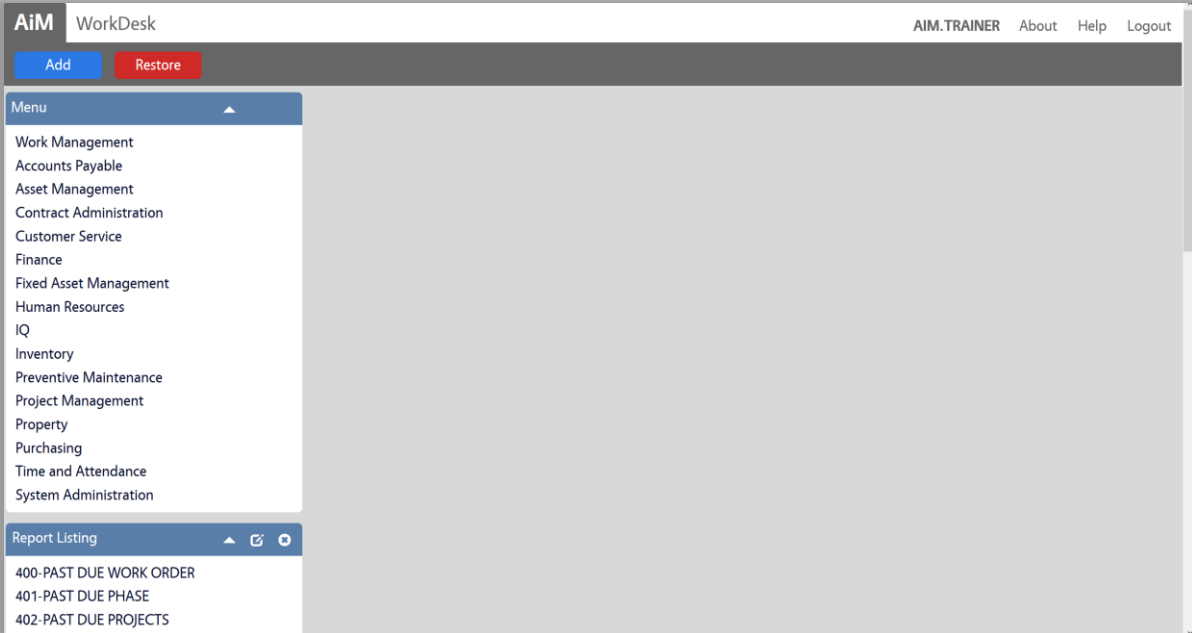
Reference Number  
Warehouse: [DGS\\_STOREROOM1](#)  
DGS SUPPLY & SURPLUS  
Total Cost: \$702.00

Released By: [AIM.TRAINER](#)  
AIM TRAINER  
Released To: [AIM.EMPLOYEE](#)  
AIM EMPLOYEE  
Release Date: Jul 17, 2019

**Line Items**

Line	Part	Description	Bin	Released	Returned	Work Order	Phase	Pick Ticket
1	3039	BALLAST, DIMMING, LUTRON, 120V, EC3DT4MWKU2S	A7-2	8.0000	0.0000	190612-117889	001	1022

18) The main Work Desk. The Process is complete.



**AiM** WorkDesk AIM.TRAINER About Help Logout

Add Restore

**Menu**

- Work Management
- Accounts Payable
- Asset Management
- Contract Administration
- Customer Service
- Finance
- Fixed Asset Management
- Human Resources
- IQ
- Inventory
- Preventive Maintenance
- Project Management
- Property
- Purchasing
- Time and Attendance
- System Administration

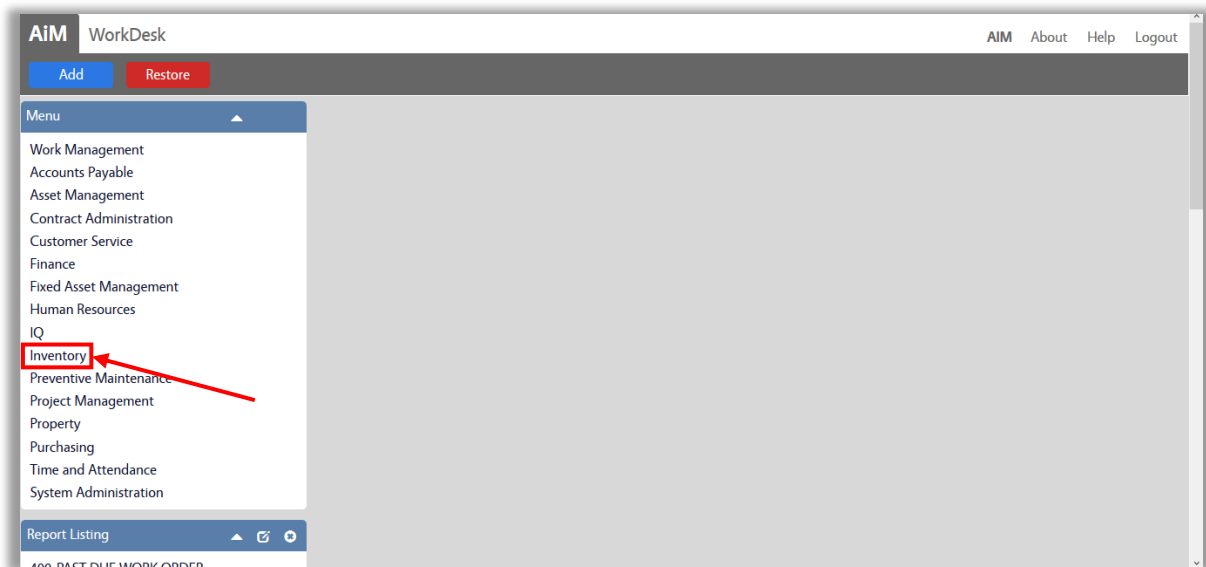
**Report Listing**

- 400-PAST DUE WORK ORDER
- 401-PAST DUE PHASE
- 402-PAST DUE PROJECTS

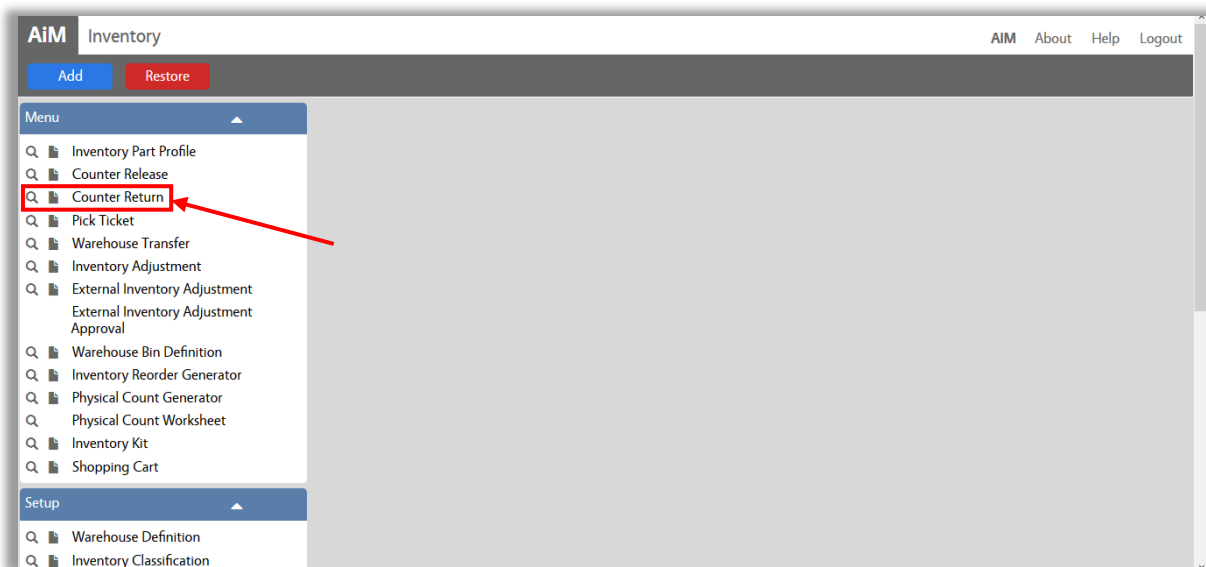
## Counter Return

This method is used to process a Counter Return.

- 1) Login to AiM™ and click the 'Inventory' link from the menu channel.



- 2) From the 'Inventory' menu channel, click 'Counter Return'.



3) Click the 'New' button.

The screenshot shows the 'Counter Return' form. At the top left, the 'New' button is highlighted with a red box and a red arrow. The form has a header bar with 'AiM' and 'Counter Return'. Below the header, there are input fields for 'Released By', 'Released To', and 'Release Date'. To the right, there are fields for 'Reference Number', 'Warehouse', and 'Total Cost' (showing \$0.00). At the bottom, there is a 'Line Items' table with columns: Line, Part, Description, Bin, Released, Returned, Work Order, Phase, Pick Ticket, and Adjustment. The footer shows '©2019 AssetWorks'.

4) Click the 'Execute' button.


The screenshot shows the 'Counter Release Transaction Search' form. At the top left, the 'Execute' button is highlighted with a red box and a red arrow. The form has a header bar with 'AiM' and 'Counter Release Transaction Search'. Below the header, there are buttons for 'Advanced Search' and 'Reset'. The main area contains a search criteria table with columns: Action, Display Order, Sort, Operator, and a search input field. The search criteria table has rows for Transaction, Trans Date, Description, Warehouse, Released By, Released To, Reference Number, Editor, Edit Date, and Extra Description. The search input field contains the text 'LEAK IN WALL'. The footer shows '©2019 AssetWorks'.

*Note: Add search criteria to find a specific transaction.*


5) Select the 'Transaction' by clicking the associated link.


Action	Transaction	Warehouse	Description
<a href="#">Export</a> <a href="#">View</a>	<a href="#">1040</a>	DGS_STOREROOM1	LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE


Page 1 of 1 Go Display: 25 First Previous Next Last Records Found = 1

6) Click the 'Returned By' Zoom  icon.

Warehouse: DGS\_STOREROOM1  
DGS SUPPLY & SURPLUS  
Total Cost: \$1.02

Returned By:  

Returned To:  


Return Date: Jul 22, 2019 

Return All

Bin	Released	Returned	Work Order	Phase	Pick Ticket	Adjustment
-----	----------	----------	------------	-------	-------------	------------

- 7) Choose the appropriate employee by clicking the associated 'Employee ID' link.

Employee ID #	First Name	Last Name
<a href="#">AIM.EMPLOYEE</a>	AIM	EMPLOYEE

- 8) Click the 'Returned To' Zoom  icon. Follow the prompts.

Warehouse
DGS\_STOREROOM1
DGS SUPPLY & SURPLUS
Total Cost
\$1.02

Returned By
  
AIM EMPLOYEE

Returned To

Return Date

Return All

Bin	Released	Returned	Work Order	Phase	Pick Ticket	Adjustment
-----	----------	----------	------------	-------	-------------	------------

- 9) Choose the appropriate employee by clicking the associated 'Employee ID' link.

Employee ID #	First Name	Last Name
AIM.TRAINER	AIM	TRAINER

- 10) Click the Line Items link.

Line	Part	Description	Bin	Released	Returned	Work Order	Phase	Pick Ticket	Adjustment
1	0165	COVER, BLANK, (1) GANG, F/UTILITY BOX	A9-1	3.0000	1.0000	190712-117907	001	1051	
2	0168	COVER, BLANK, SQUARE, 4"	A8-22	2.0000	0.0000	190712-117907	001	1051	

- 11) The Default Bin will automatically populate.

2

Last Edited by JERE DUNKLEBERGER On 07/15/2019 01:45 PM

Original Transaction: 1040

Part: 0168  
COVER, BLANK, SQUARE, 4"

Work Order: 190712-117907  
LEAK IN WALL, CORNER OFFICE - TRAINING

Phase: 001  
LEAK IN WALL, CORNER OFFICE - TRAINING

Bin: A8-22

UOM: EACH

Unit Cost: 50.2400

Quantity on Hand: 40.0000

Released: 2.0000

Prior Return Quantity: 0.0000

Return Quantity: 0.0000

Returned By: AIM.EMPLOYEE

Returned To: AIM.TRAINER

Return Date: Jul 22, 2019

Asset:

Equipment:

Pick Ticket: 1051

12) Add the quantity of items returned.

**AiM Counter Return Line Item** AIM About Logout

Done Cancel

2 Last Edited by JERE DUNKLEBERGER On 07/15/2019 01:45 PM

Part	0168 COVER, BLANK, SQUARE, 4"	Work Order	190712-117907 LEAK IN WALL, CORNER OFFICE - TRAINING	Returned By	AIM.EMPLOYEE <input type="text"/>
Bin	A8-22 <input type="text"/>	Phase	001 LEAK IN WALL, CORNER OFFICE - TRAINING	Returned To	AIM.TRAINER <input type="text"/>
UOM	EACH	Released	2.0000	Return Date	Jul 22, 2019 <input type="text"/>
Unit Cost	\$0.2400	Prior Return Quantity	0.0000		
Quantity on Hand	40.0000	Return Quantity	<input type="text" value="1.0"/>		
Asset		Equipment		Pick Ticket	1051

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13) Click the 'Done' button.

**AiM Counter Return Line Item** AIM About Logout

Done Cancel

2 Last Edited by JERE DUNKLEBERGER On 07/15/2019 01:45 PM

Part	0168 COVER, BLANK, SQUARE, 4"	Work Order	190712-117907 LEAK IN WALL, CORNER OFFICE - TRAINING	Returned By	AIM.EMPLOYEE <input type="text"/>
Bin	A8-22 <input type="text"/>	Phase	001 LEAK IN WALL, CORNER OFFICE - TRAINING	Returned To	AIM.TRAINER <input type="text"/>
UOM	EACH	Released	2.0000	Return Date	Jul 22, 2019 <input type="text"/>
Unit Cost	\$0.2400	Prior Return Quantity	0.0000		
Quantity on Hand	40.0000	Return Quantity	<input type="text" value="1.0"/>		
Asset		Equipment		Pick Ticket	1051

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14) Optional: To return all items on the Counter Release, click the 'Return All' button.

Returned By: AIM.EMPLOYEE

Returned To: AIM.TRAINER

Return Date: Jul 22, 2019

**Return All**

Bin	Released	Returned	Work Order	Phase	Pick Ticket	Adjustment
GANG, A9-1	3.0000	1.0000	190712-117907	001	1051	
SQUARE, 4* A8-22	2.0000	1.0000	190712-117907	001	1051	

15) Click the 'Save' button.

**Save** Cancel

**1040** Last Edited by JERE DUNKLEBERGER On 07/15/2019 01:45 PM

Reference Number: DGS\_STOREROOM1

Warehouse: DGS SUPPLY & SURPLUS

Total Cost: \$1.02

Released By: SMUTZABAUG

Released To: ABAER

Release Date: Jul 15, 2019

Returned By: AIM.EMPLOYEE


Returned To: AIM.TRAINER

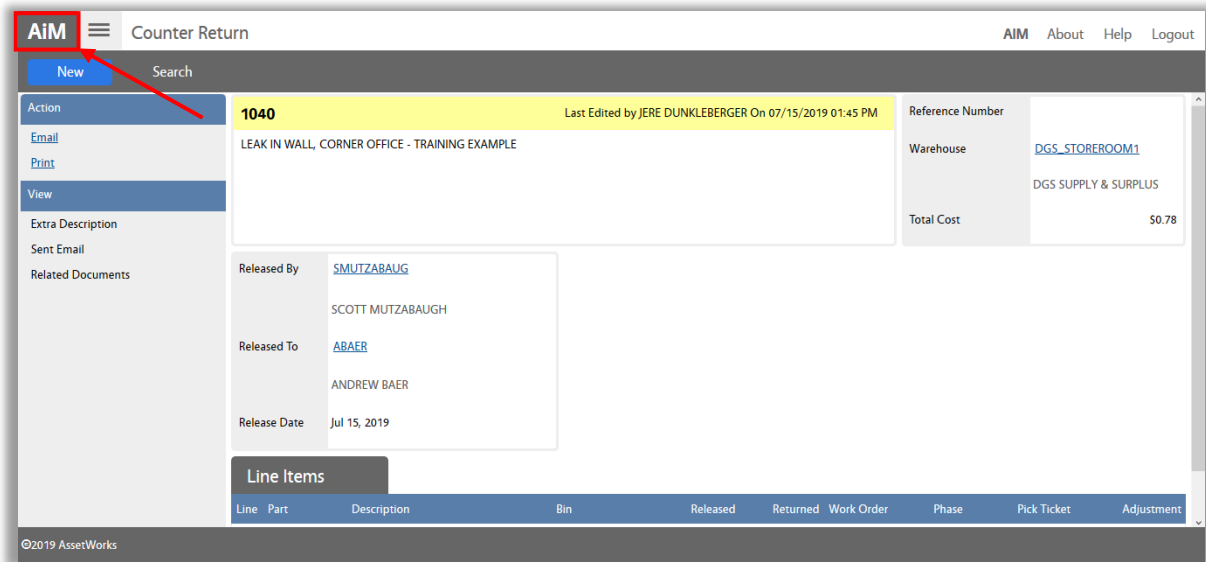
Return Date: Jul 22, 2019

**Line Items**

Line	Part	Description	Bin	Released	Returned	Work Order	Phase	Pick Ticket	Adjustment
		LEAK IN WALL, CORNER OFFICE - TRAINING EXAMPLE							

**Return All**

16) Click the AiM™  logo to return to the main Work Desk.



17) The main Work Desk. The Process is complete.

