PA pennsylvania

AssetWORKS
Integrated Workplace Management Systems

INVENTORY

WAREHOUSE END USER TRAINING GUIDE

July 23, 2019

Table of Contents

Navigation

Logging into AiM

Logging into the system:

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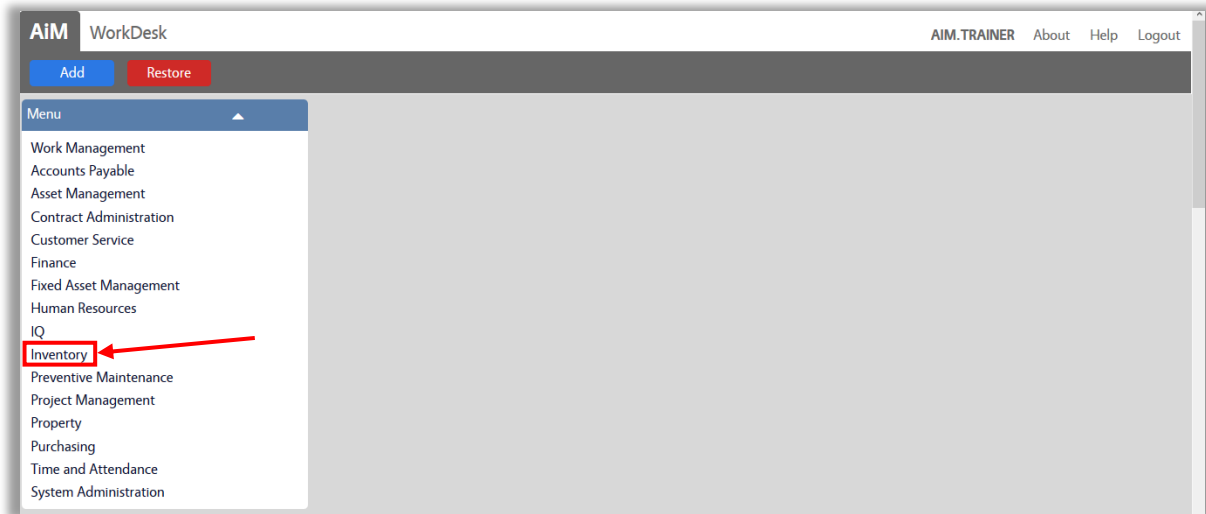
Password: This field is populated with the password.

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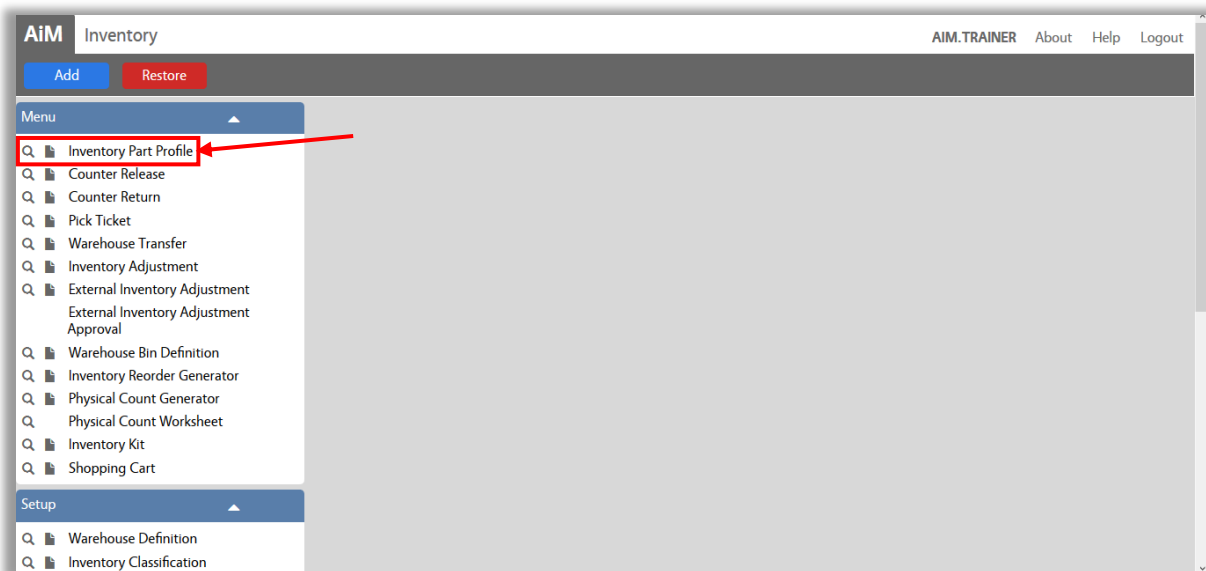
Inventory

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.

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

5) Provide a detailed Description.

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

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

AiM ≡	Inventory Class	
Done	Search	Cancel
Class ⇓	Description	
ELECTRICAL	ELECTRICAL ITEMS	
JANITORIAL	JANITORIAL SUPPLIES	
OFFICE SUPPLY	OFFICE SUPPLIES	
PLUMBING	PLUMBING SUPPLIES	
SAFETY & HEALTH	SAFETY SUPPLIES	

8) Select the Commodity. Click the Commodity link.
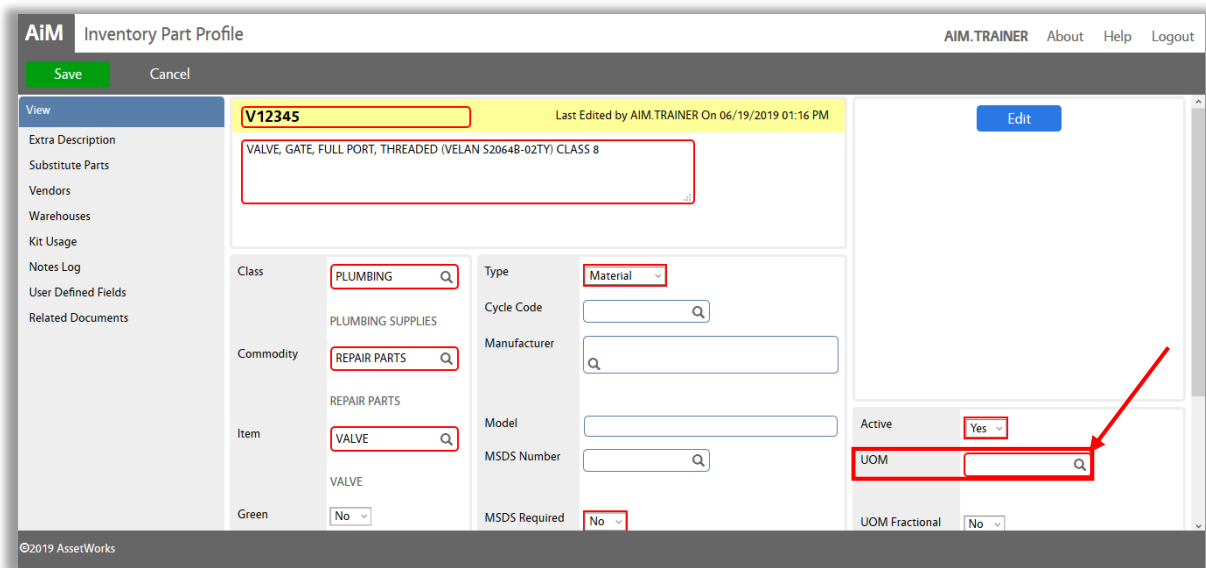
AiM ≡	Commodity		
Done	Search	Show All	Cancel
Inventory Class : PLUMBING			
Commodity ⇓	Description		
REPAIR PARTS	REPAIR PARTS		

9) Select the Item. Click the Item link.

AiM ≡	Inventory Item		
Done	Search	Show All	Cancel
Inventory Class : PLUMBING	Commodity : REPAIR PARTS		
Inventory Item ⇓	Description		
VALVE	VALVE		

10) Click the UOM (Unit of Measure) 'Zoom' 🔍 icon.
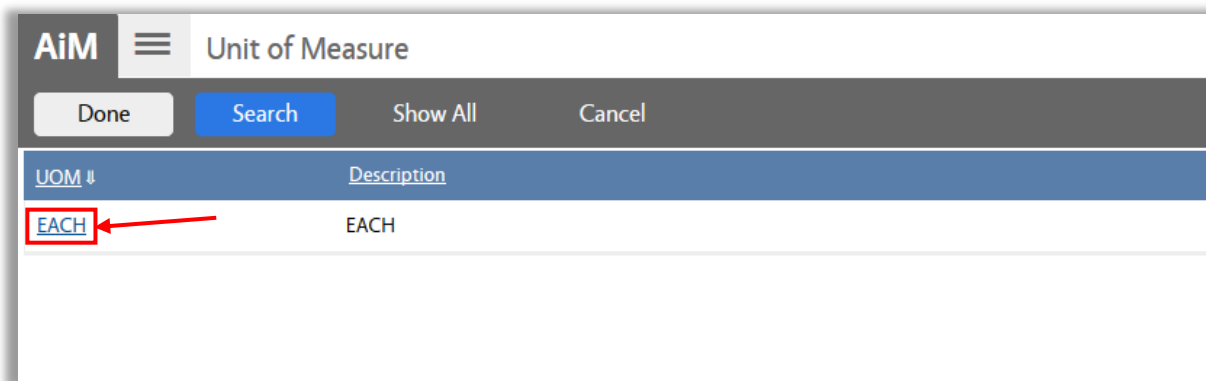
11) Select the appropriate Unit of Measure.

12) Select the 'Save' button.

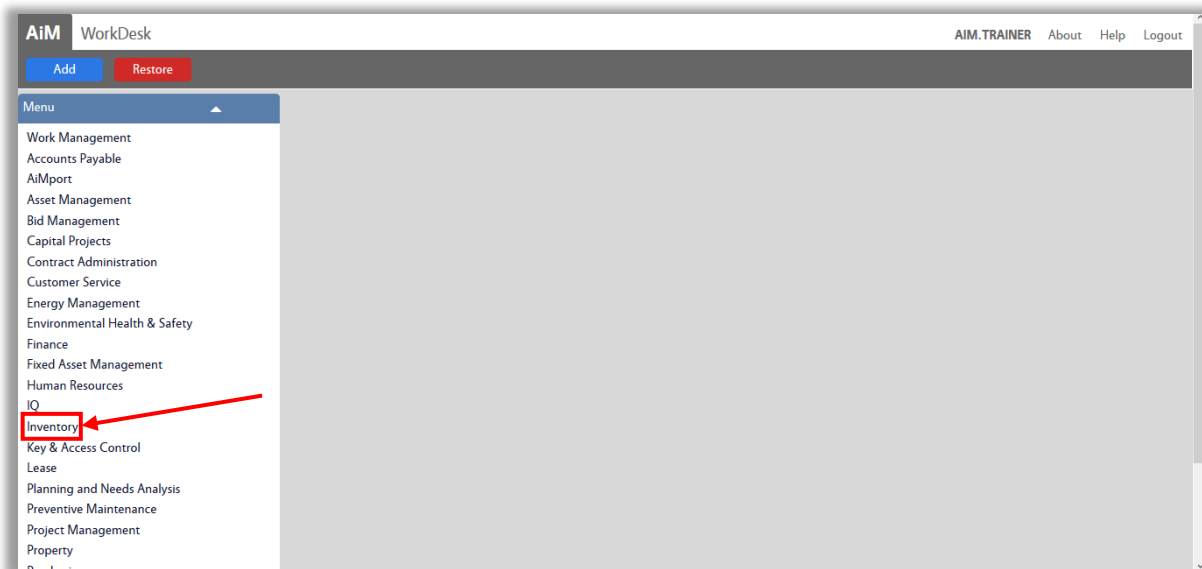13) Click the AiM™ logo to return to the main Work Desk.
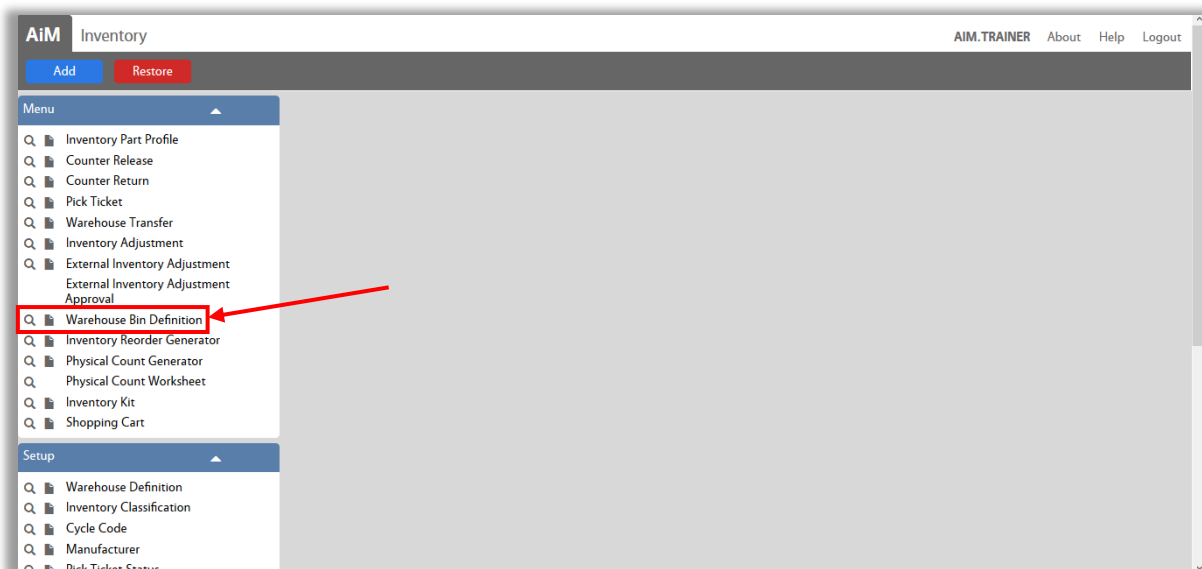
14) The main Work Desk. The Process is complete.
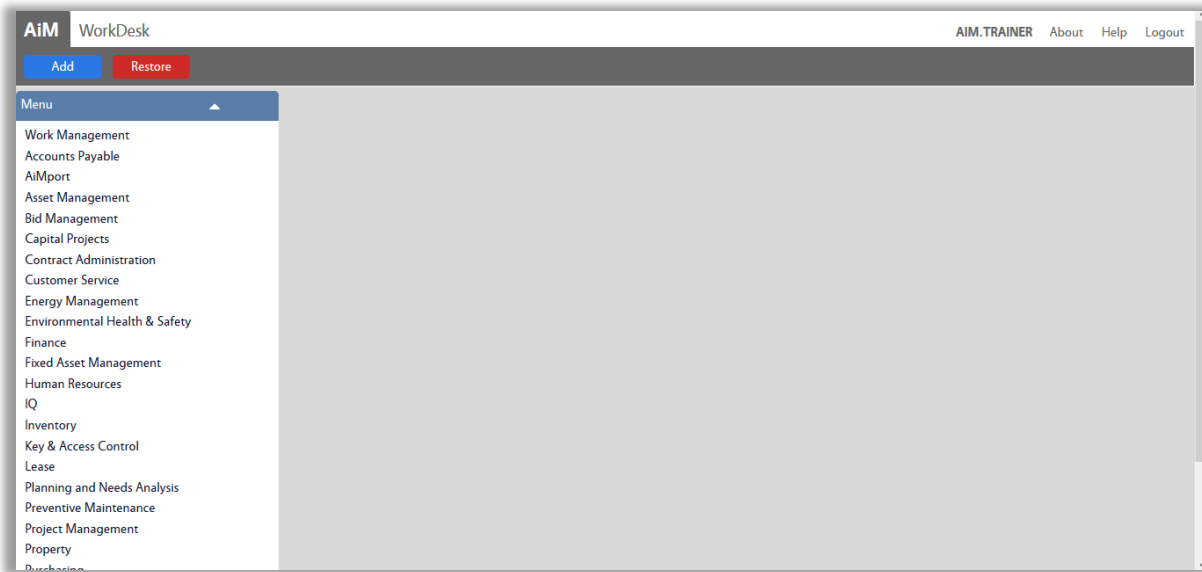
Warehouse Bin Definition
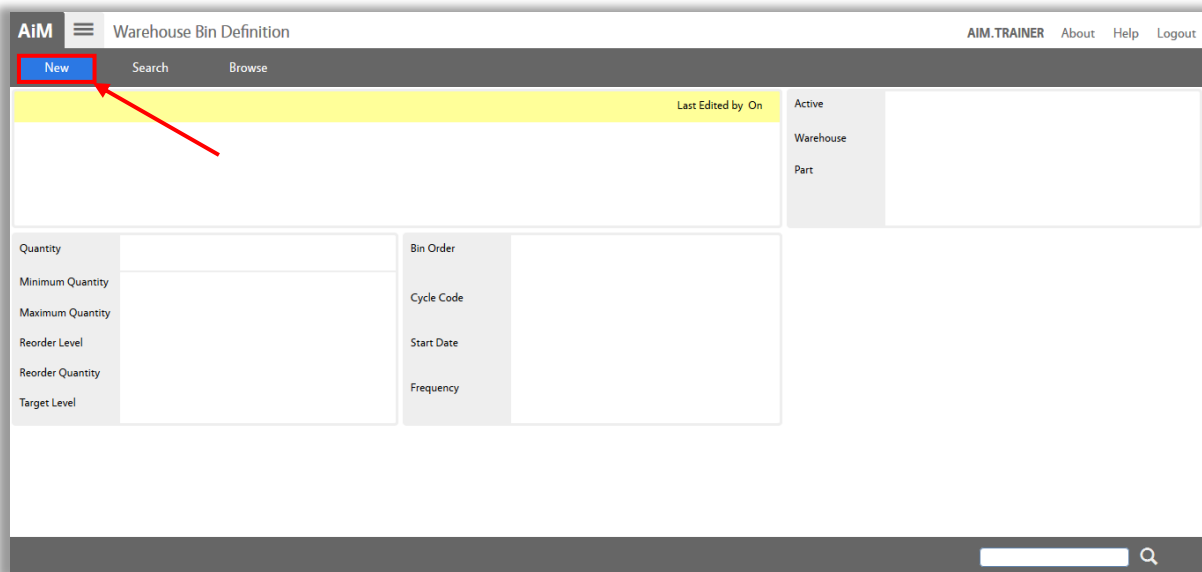
This method is used to define a Warehouse Bin.

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

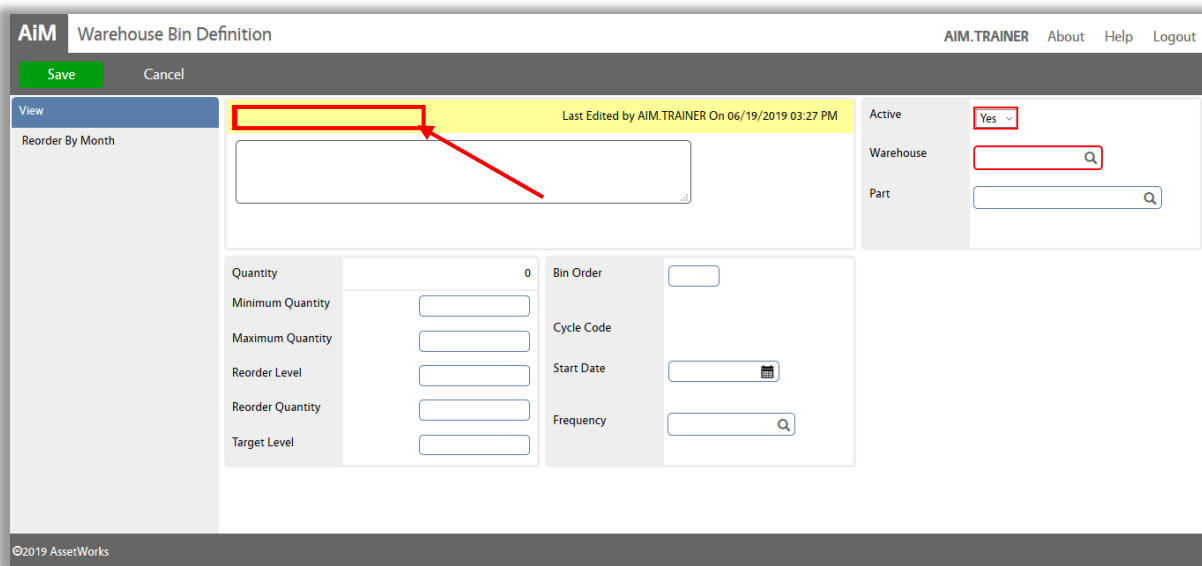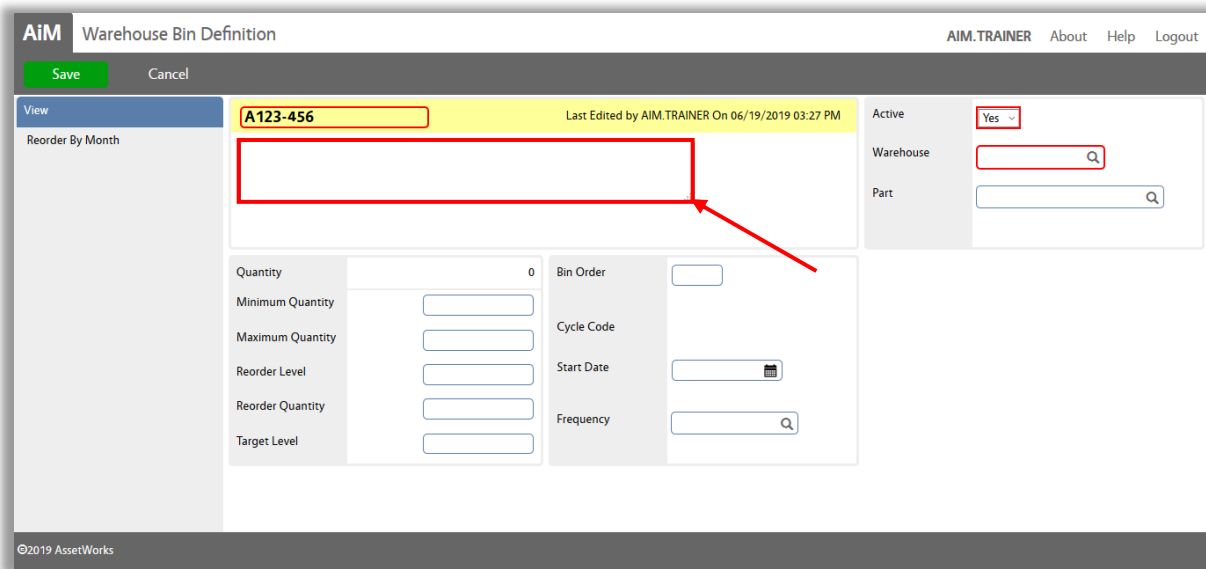2) From the 'Inventory' menu channel, click the 'Warehouse Bin Definition' link.

3) Click the 'New' button.

4) Provide a Bin Identification Code.

5) Optional: Provide a detailed Description.

6) Click the 'Warehouse' Zoom 🔍 icon.

7) Select the 'Warehouse', click the associated Warehouse link.
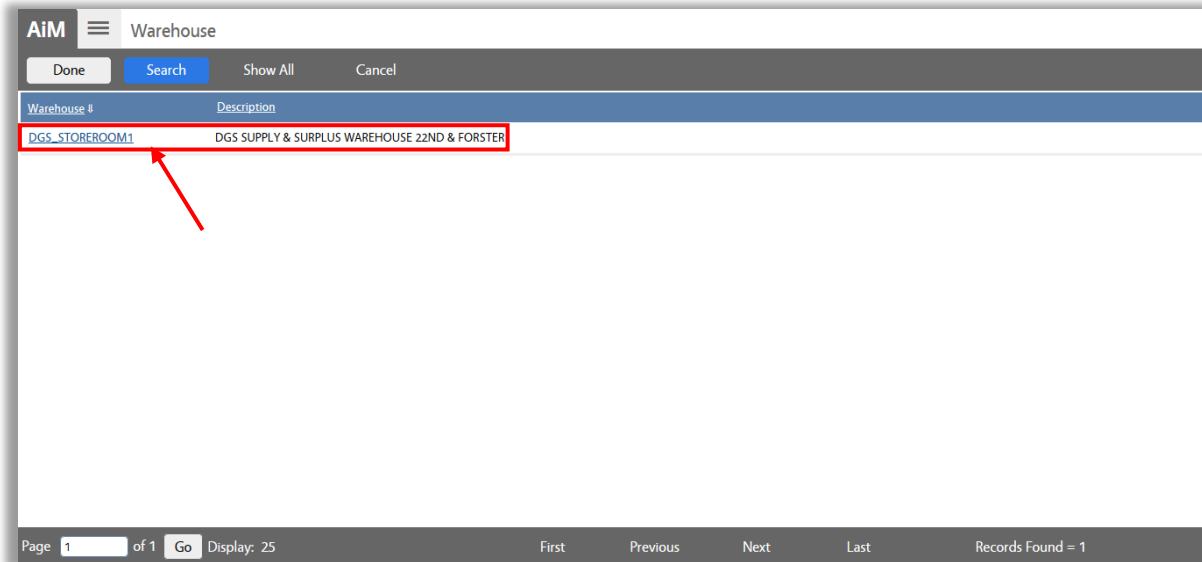
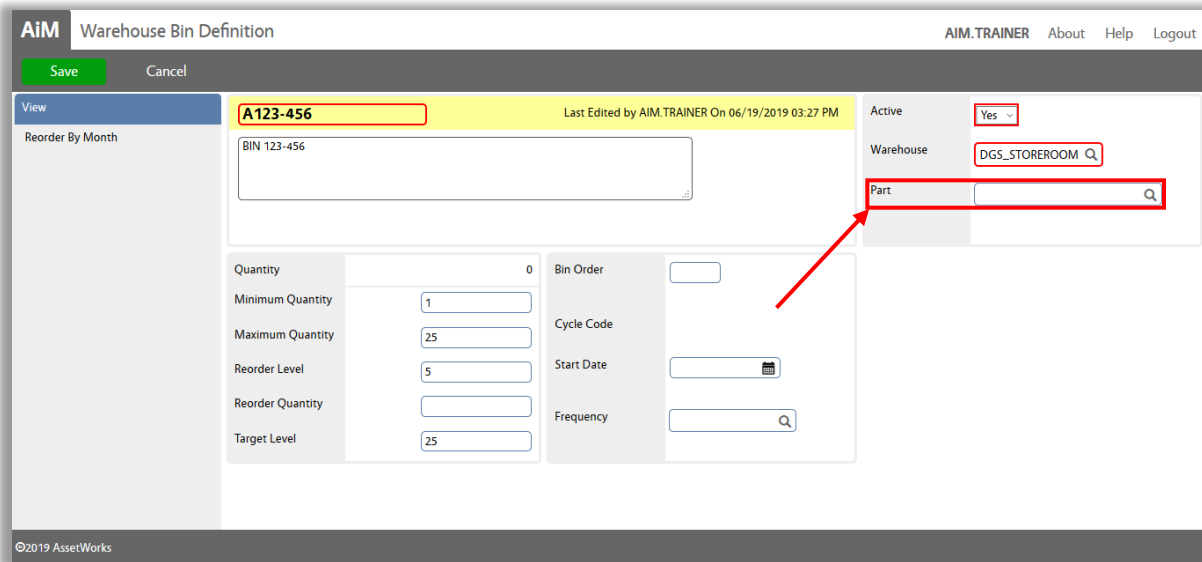8) Insert your Bin Levels by entering the numeric values in the associated boxes.

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.

10) Click the 'Save' button.

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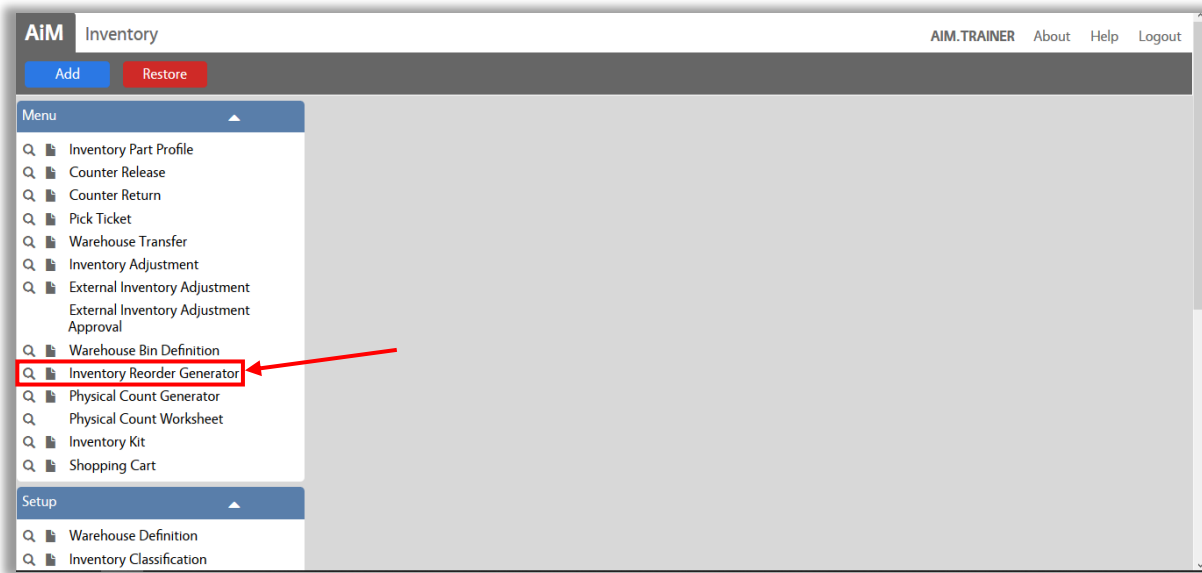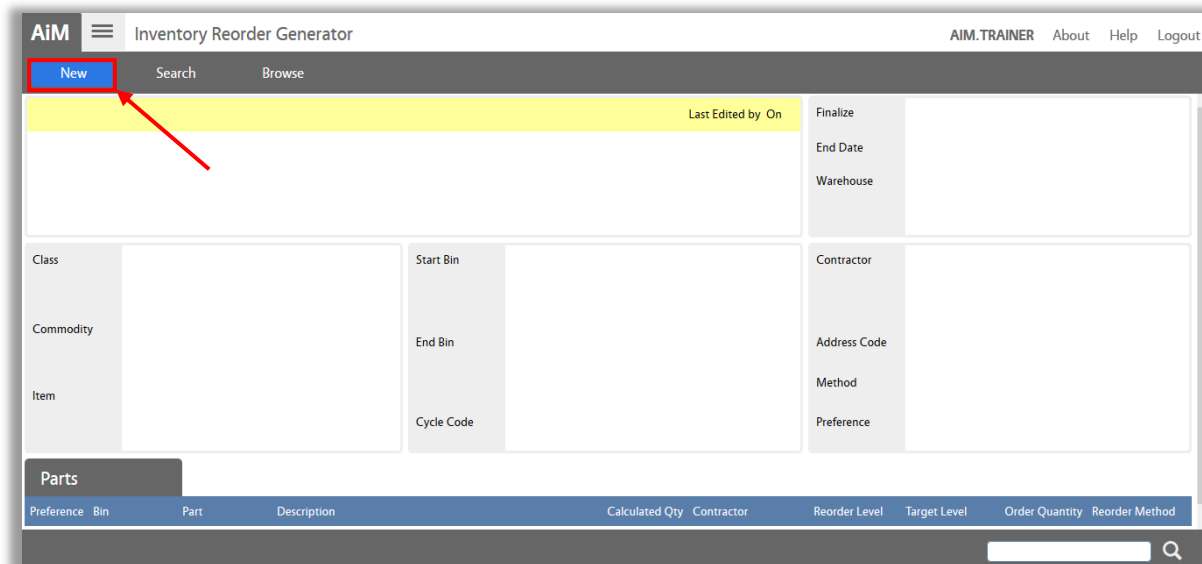

12) The Main Work Desk. The Process is complete.

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.

5) Optional: Use one of the filters to select which Bins, Contractor, or Class/Commodity/Item's to reorder.
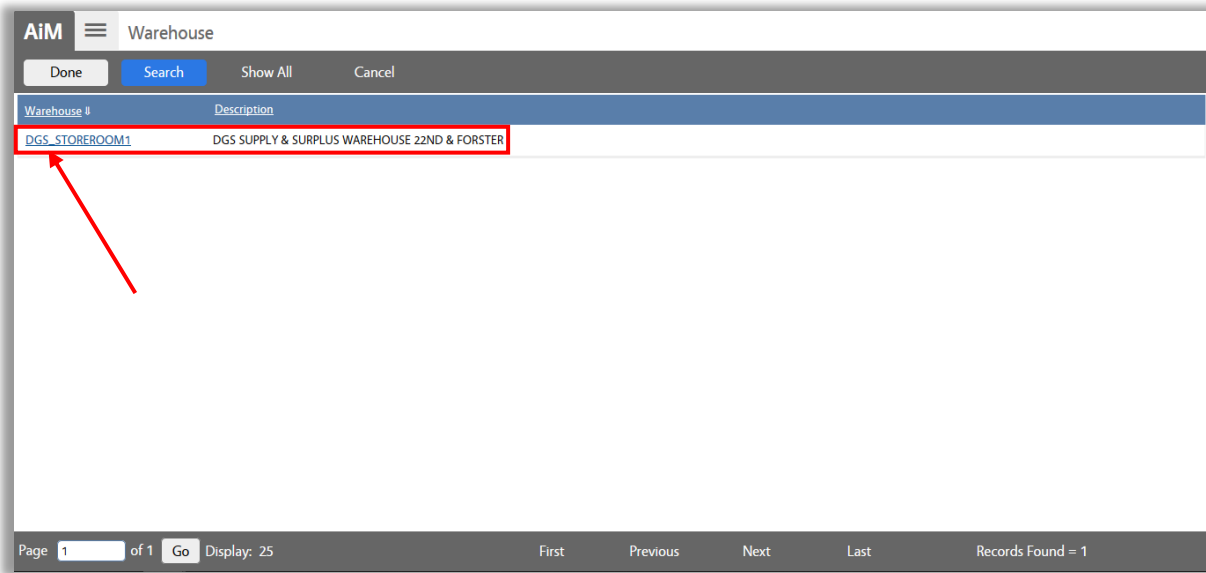
6) Optional: Click the 'End Date' Calendar Icon 📅.   Select the appropriate Date.

7) Click the 'Warehouse' Zoom 🔍 icon.

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

9) Click the 'Save' button.

10) Click the 'Generate' button to generate the Purchase Orders.
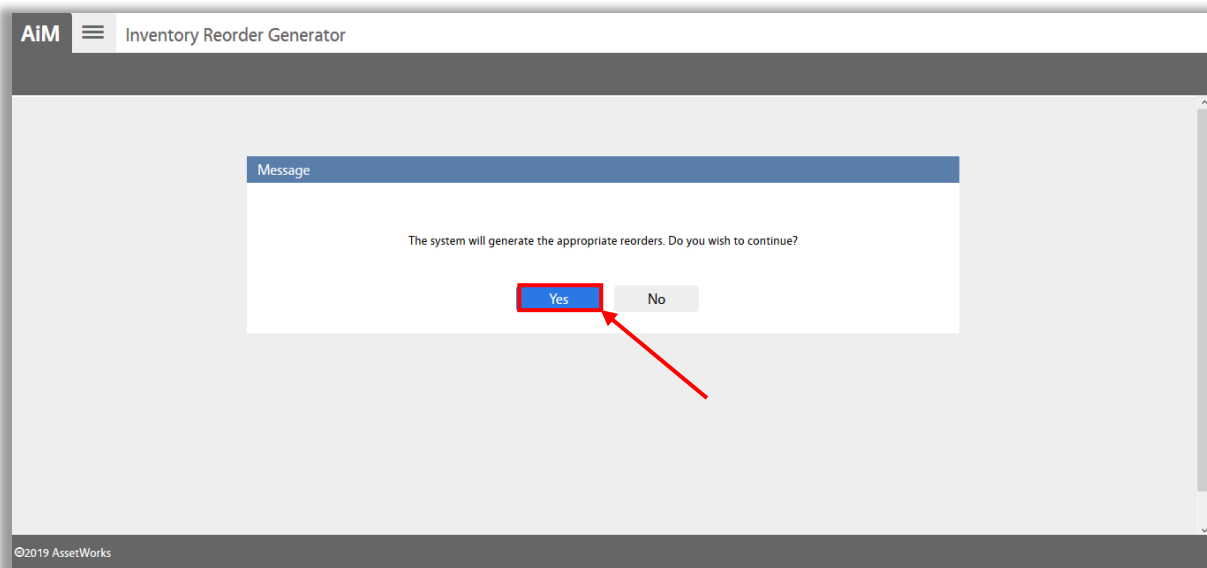
11) Information note appears. Click the 'Yes' button.
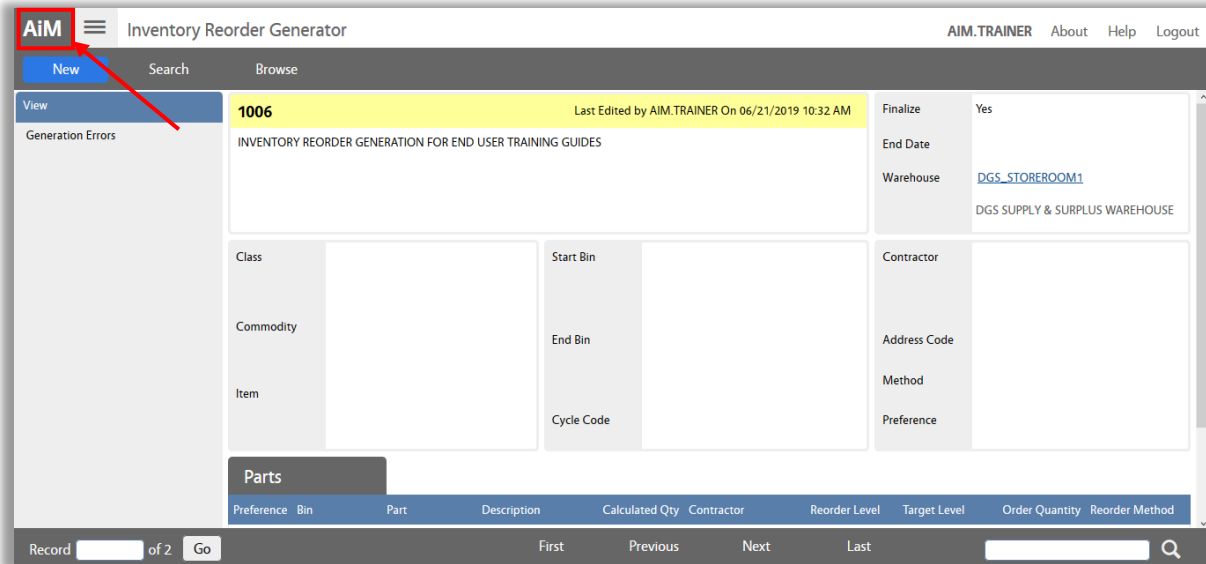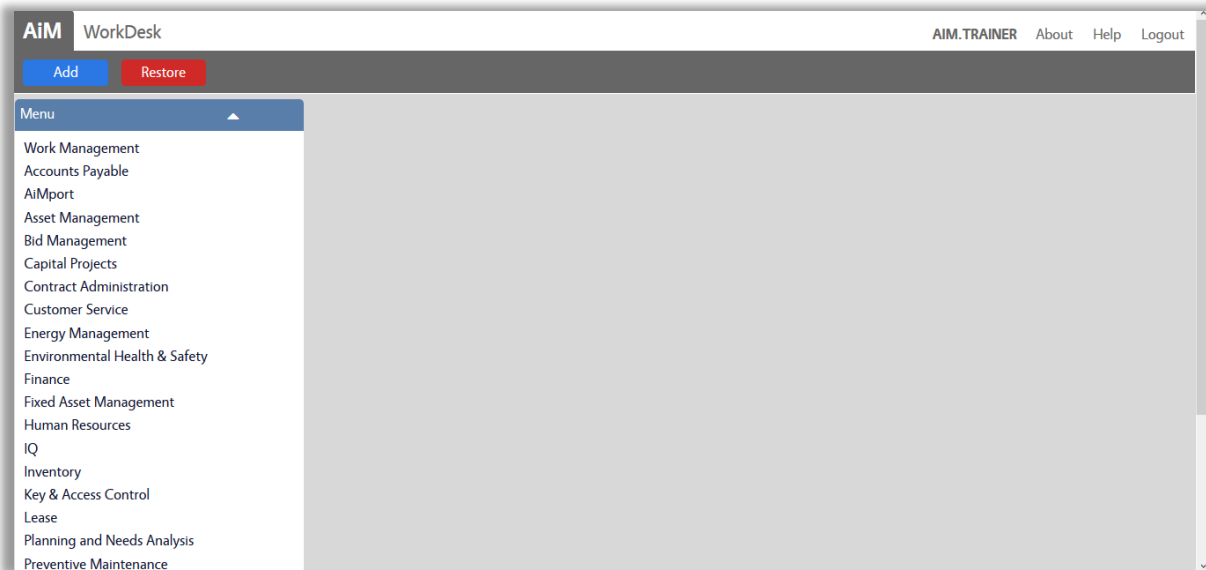
12) Click the AiM™ [AiM] logo to return to the main Work Desk.

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.
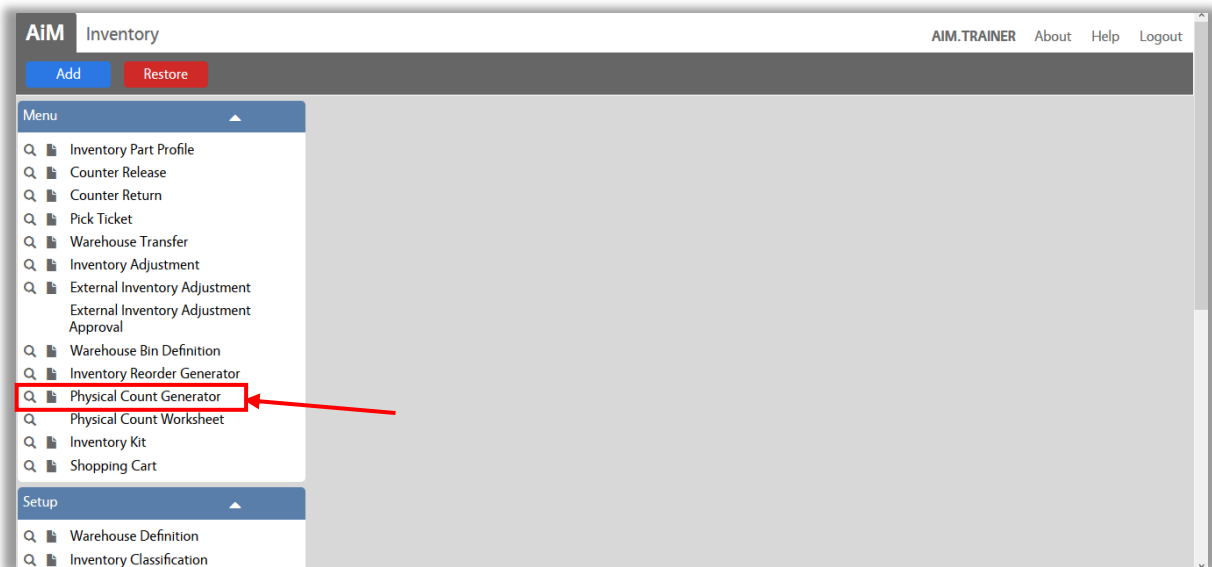
3) Click the 'New' Button

4) Add a detailed description in the Description box.
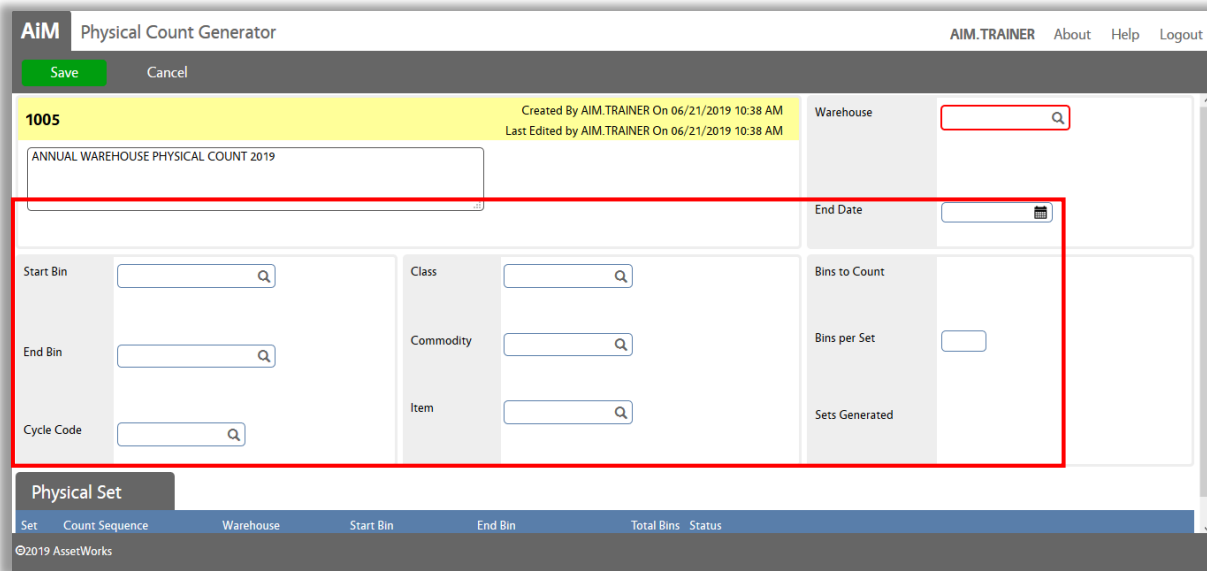
5) Optional: Click the 'End Date' Calendar Icon 📅. Select the appropriate Date. You can also choose to count only certain Bins or Class/Commodity/Items by using the associated filters.

6) Click the Warehouse 'Zoom' 🔍 icon.

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

8) Click the 'Save' button.

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

10) The Physical Count Worksheet is generated.

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

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

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.
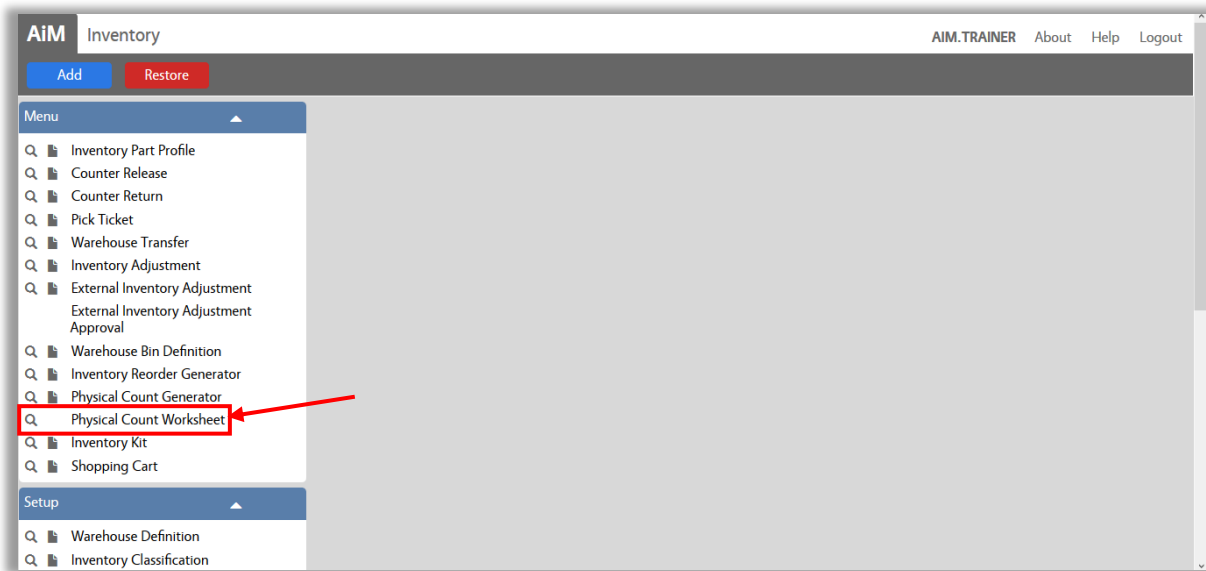
3) Click the 'Search' icon.

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

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

6) Click the 'Edit' icon.

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

8) Mark any bins for recount as appropriate.

9) Select the status zoom icon.

10) Select the 'Approved' status.

11) Click the 'Save' icon.

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

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

14) The main WorkDesk, the process is complete.

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.
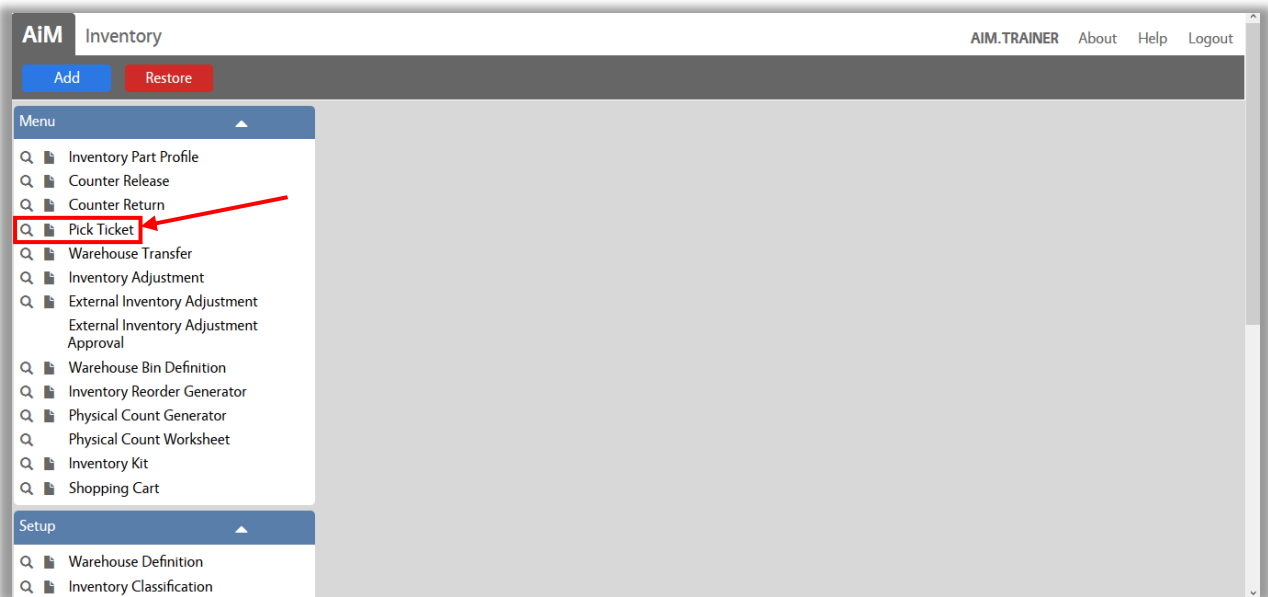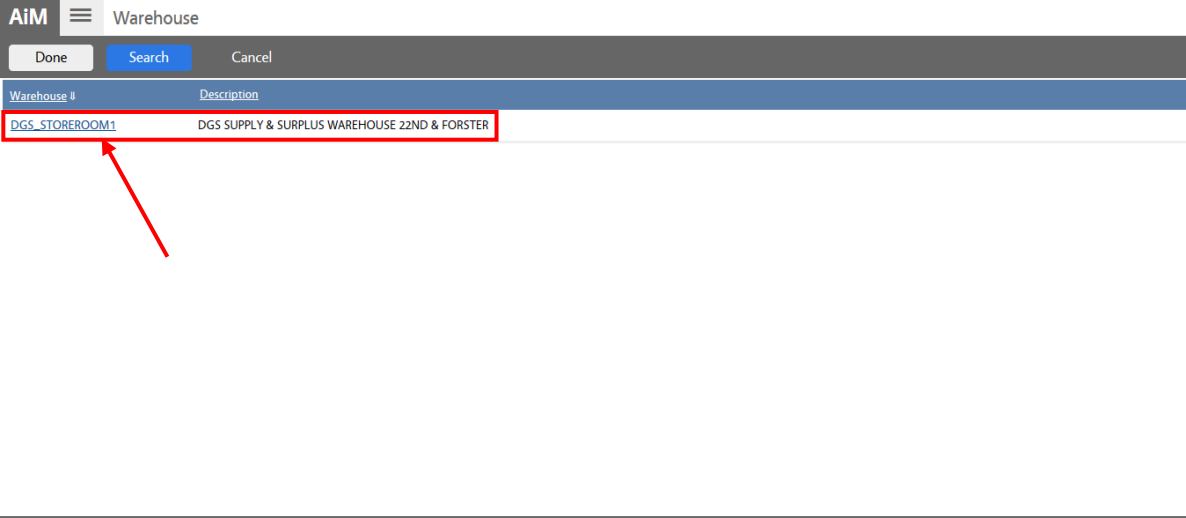
3) Click 'New' button.

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

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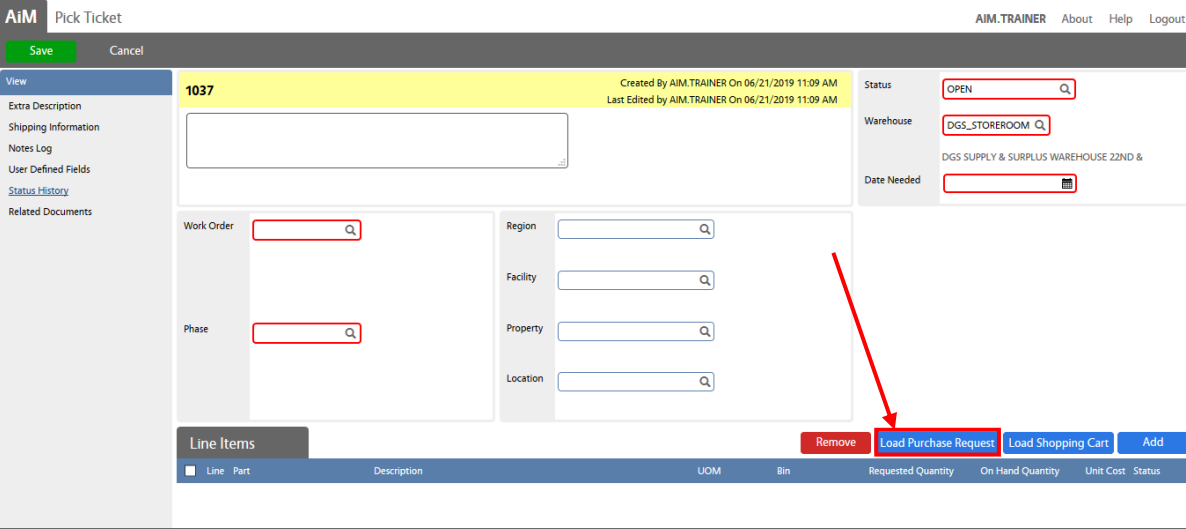
6) Click the 'Load Purchase Request' button to load finalized Purchase Requests for this warehouse.

7) Check the box next to the Purchase Request(s) you wish to load.
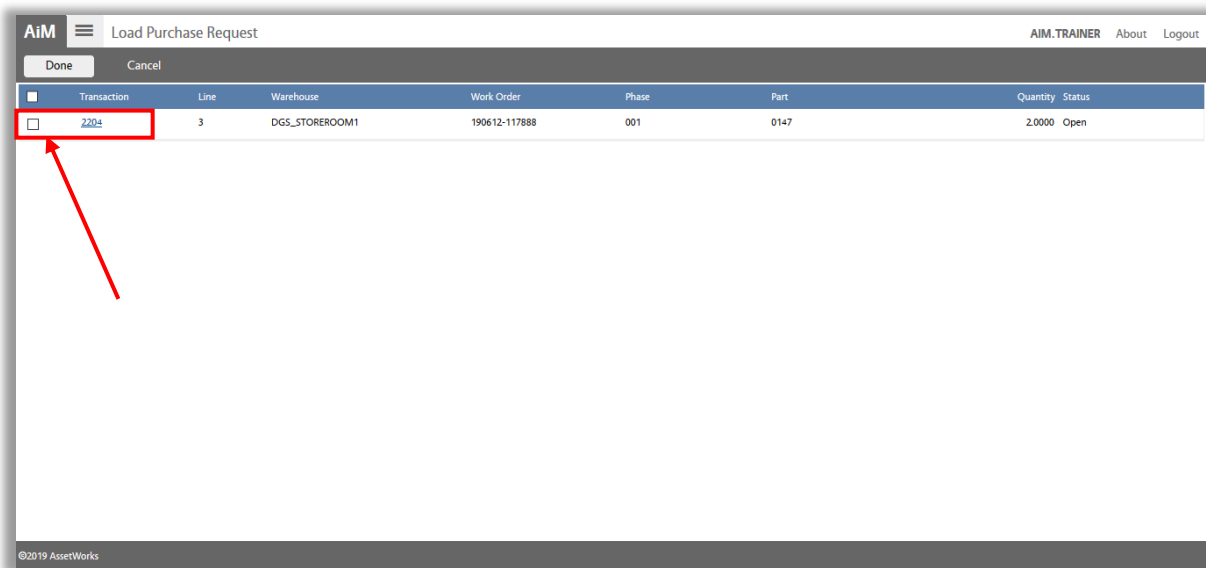
8) Click the 'Done' button.
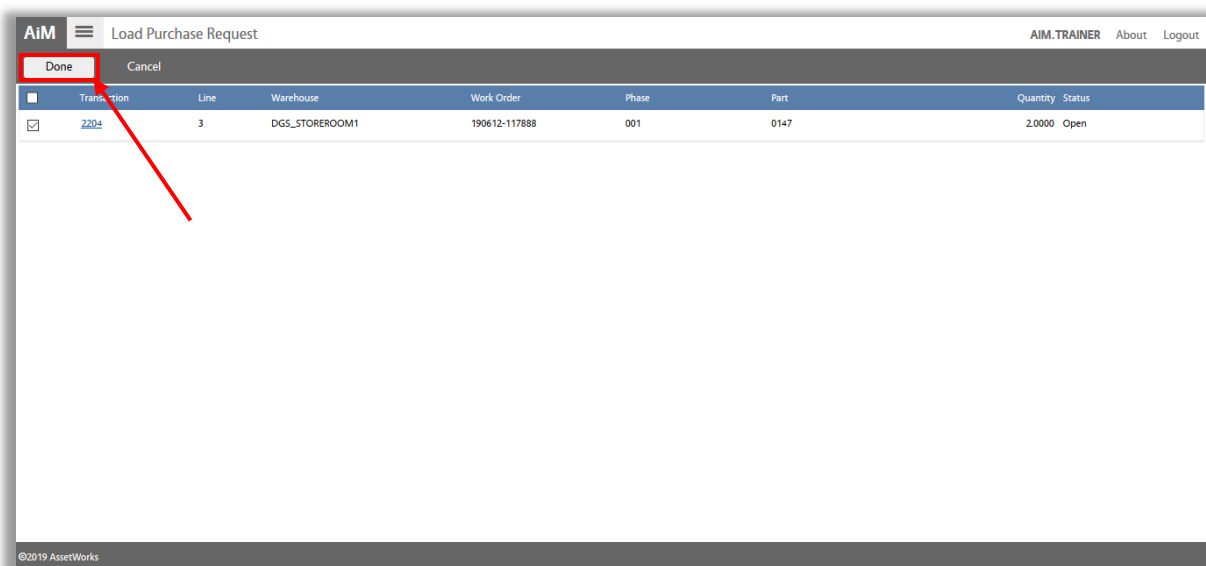
9) Note: When loading a Purchase Request, the related fields are automatically populated.

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

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

12) Choose the appropriate Pick Ticket status.

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

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

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.
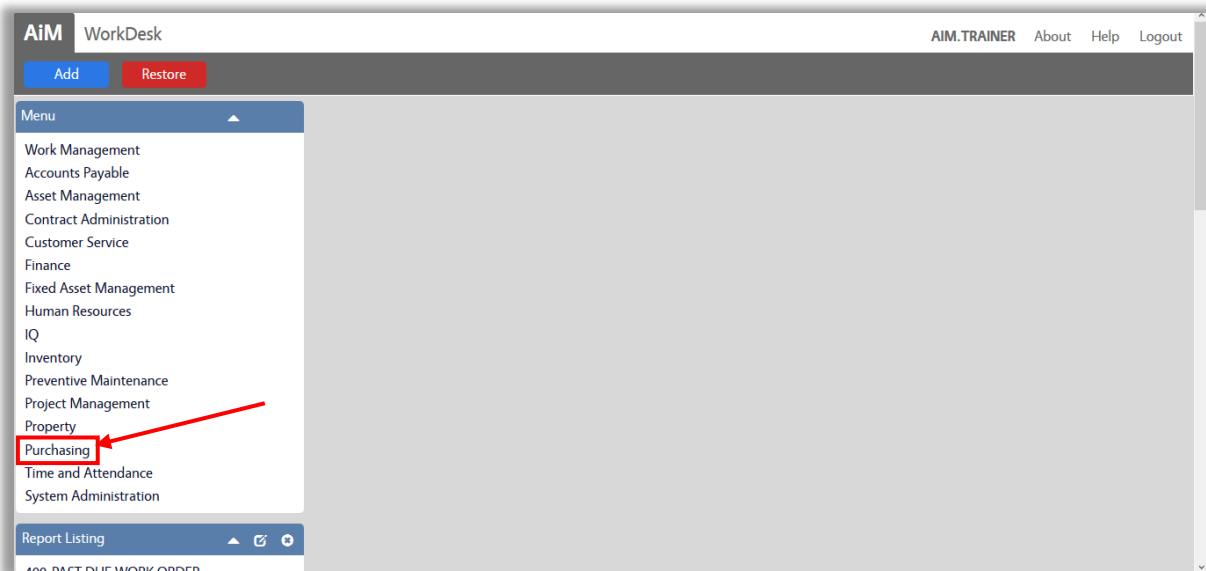
2) From the Purchasing module main WorkDesk, click the 'Purchase Receive' link.
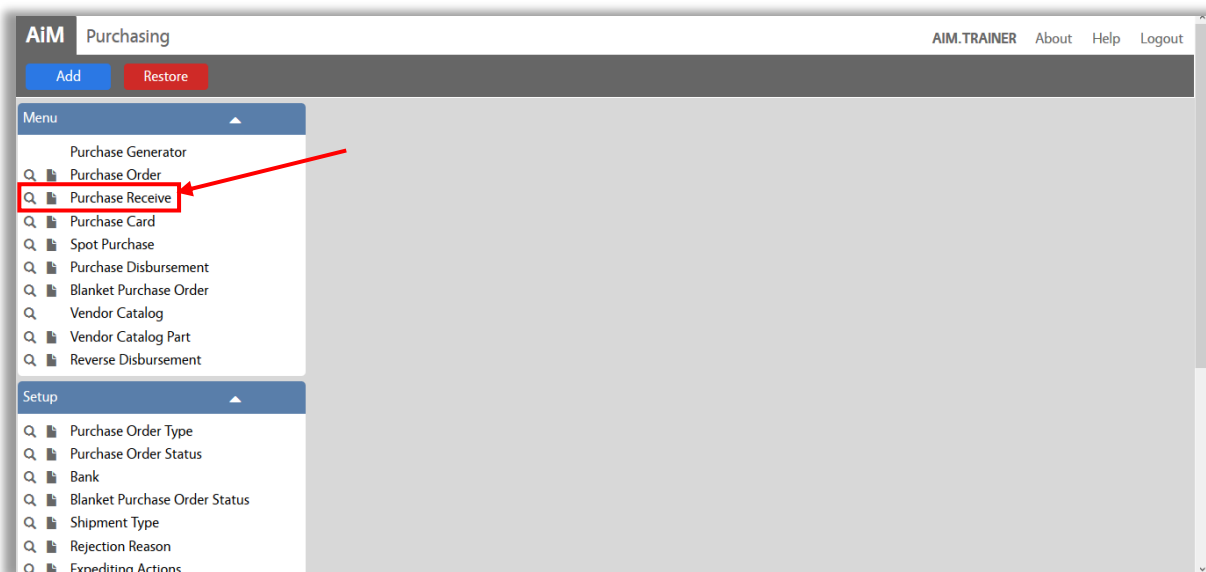
3) Click 'New'

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

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

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.

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

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

9)   Click 'Save'.

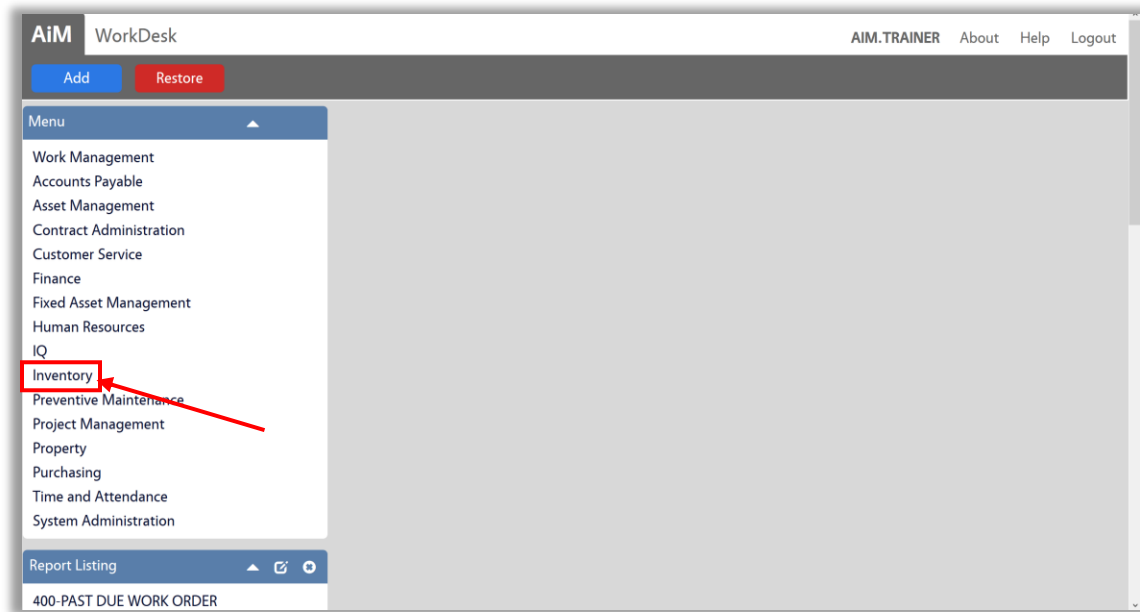10) The Purchase Receive is complete, click the AiM icon to return to the main WorkDesk.
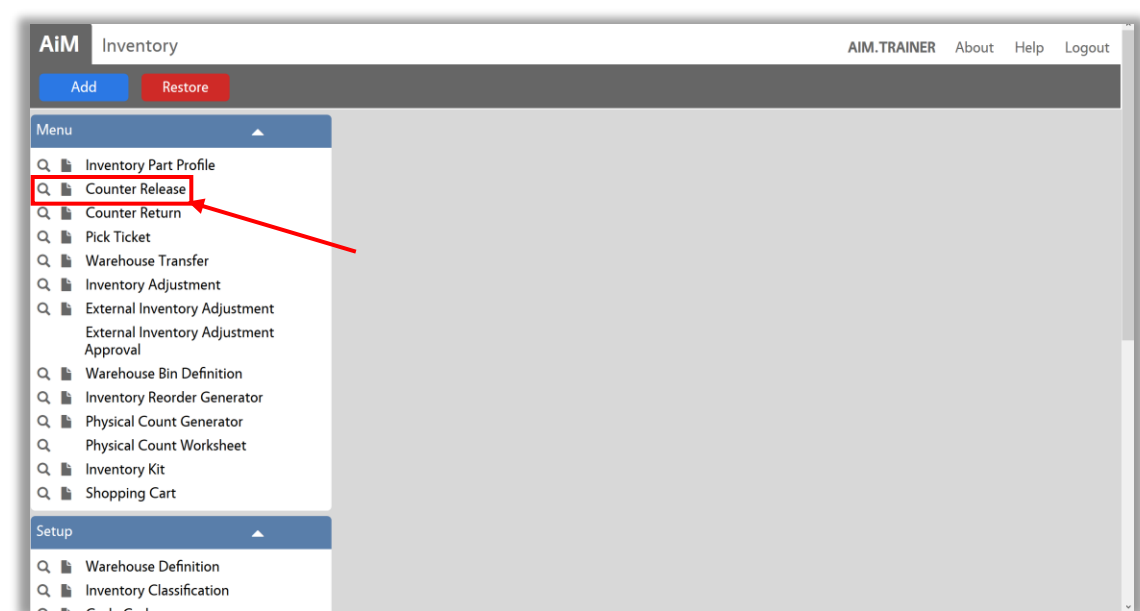
11) The main WorkDesk, the process is complete.

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.

4) Add a detailed Description.

5) Click the 'Released By' Zoom 🔍 icon.
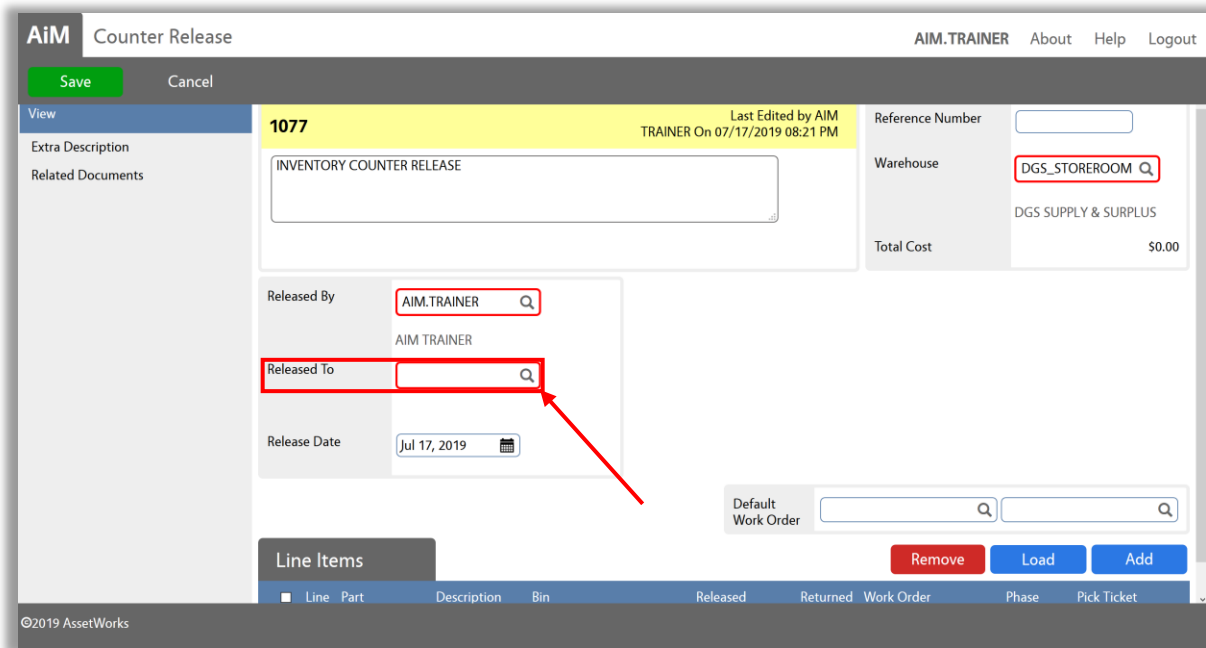
Note: The only employee's shown in the selection list are assigned to the Warehouse.

6) Select the appropriate Employee. Click the associated 'Employee ID' link.
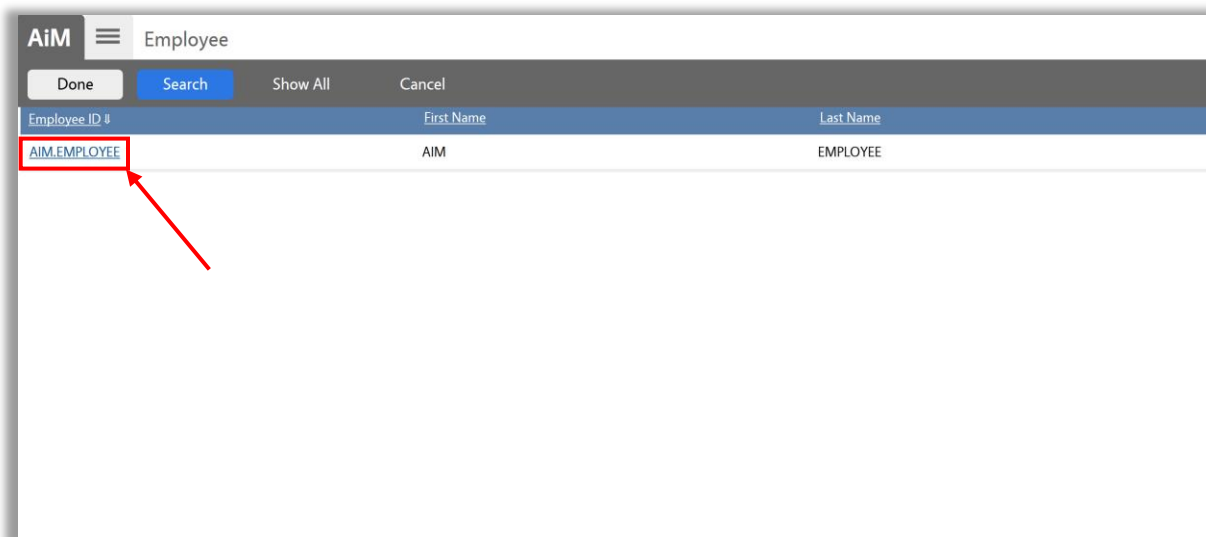
7) Click the 'Released To' Zoom 🔍 icon. Follow the prompts.

8) Select the employee by clicking the associated 'Employee ID' link.
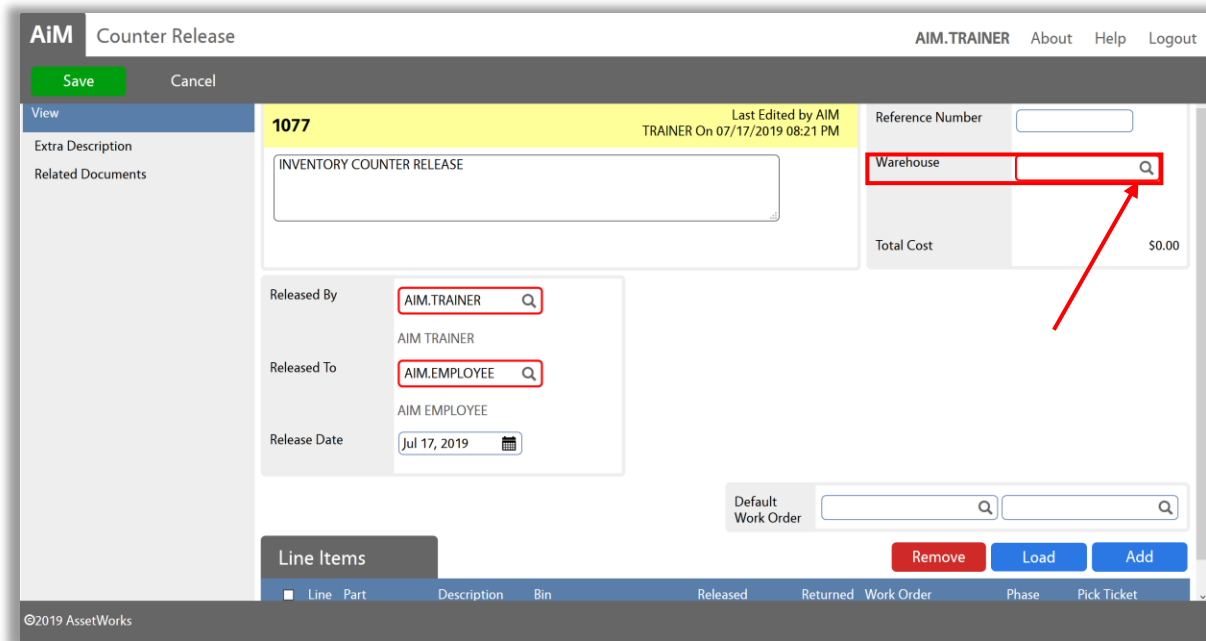
9) Click the 'Warehouse' the Zoom 🔍 icon. *Note: This may Autopopulate*.
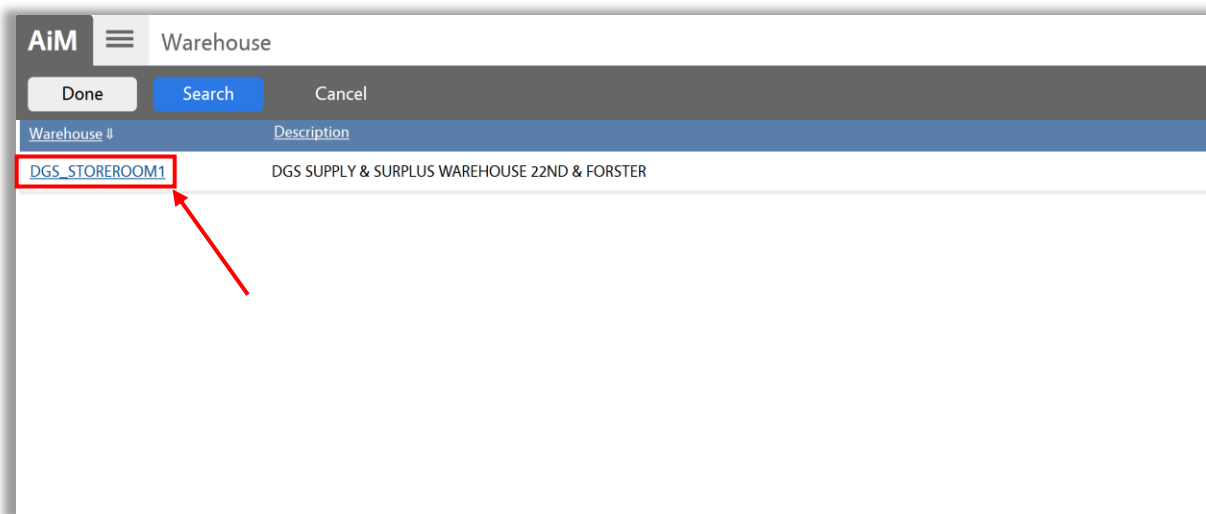
10) Select the appropriate 'Warehouse' by clicking the associated link.

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

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

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

14) Click the 'Done' button.

15) Note the Released quantity, this is defaulted from the 'Drawn' amount on the pick ticket.
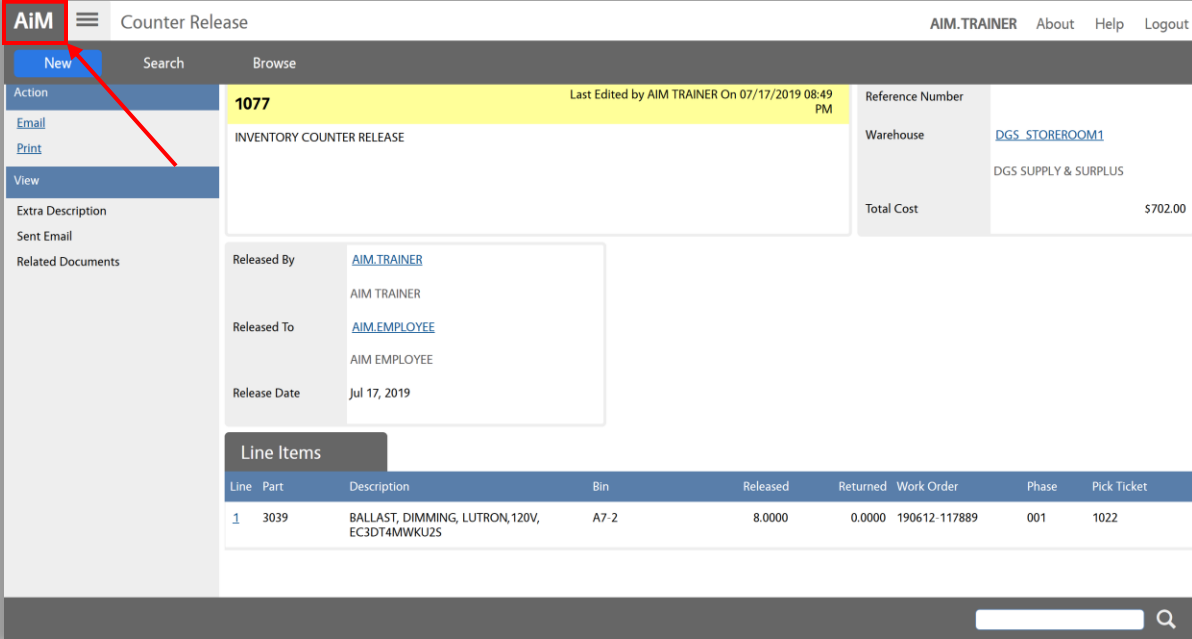
16) Click the 'Save' button to finalize the release.

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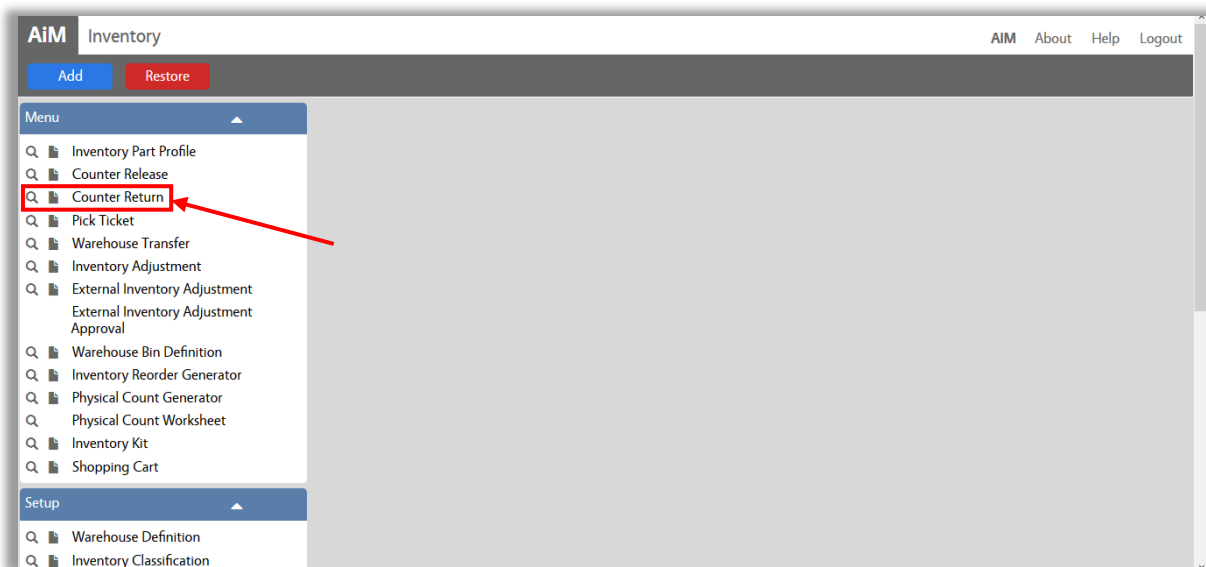

18) The main Work Desk. The Process is complete.

Counter Return

This method is used to process a Counter Return.

1)   Login to AiM™ and click the 'Inventory' link from the menu channel.
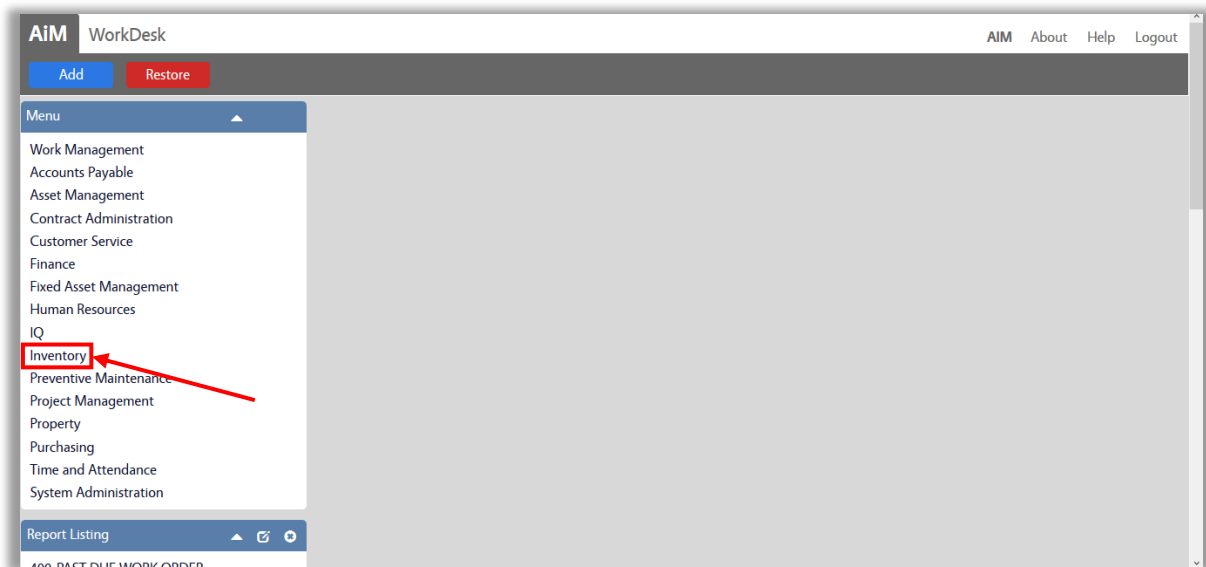
2)   From the 'Inventory' menu channel, click 'Counter Return'.

3) Click the 'New' button.

4) Click the 'Execute' button.

Note: Add search criteria to find a specific transaction.

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

6) Click the 'Returned By' Zoom 🔍 icon.

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

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

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

10) Click the Line Items link.

11) The Default Bin will automatically populate.

12) Add the quantity of items returned.

13) Click the 'Done' button.

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

15) Click the 'Save' button.

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

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