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# PeopleSoft FSCM 9.2: Mobile Inventory Management

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December 2013

**ORACLE®**

PeopleSoft FSCM 9.2: Mobile Inventory Management  
CDSKU fscm92pbr2  
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# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| <b><i>Typographical Convention</i></b> | <b><i>Description</i></b>  |
|--|--|
| Key+Key                                | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.              |
| ... (ellipses)                         | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.   |
| { } (curly braces)                     | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).   |
| [ ] (square brackets)                  | Indicate optional items in PeopleCode syntax.  |
| & (ampersand)                          | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables.   |
| ⇒                                      | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

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## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
  - PeopleSoft Online Help accessibility.
  - Accessing, navigating, and searching the PeopleSoft Online Help.
  - Managing a locally installed PeopleSoft Online Help website.
- 

## PeopleSoft FSCM Related Links

Financial and Supply Chain Management information for Secure Enterprise Search (SES) can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components (*PeopleSoft FSCM 9.2: Application Fundamentals*)" topic.

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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## Contact Us

[Send us your suggestions](#) Please include release numbers for the PeopleTools and applications that you are using.

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# Understanding PeopleSoft Mobile Inventory Management

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## Common Elements Used in Mobile Inventory Management

|                                  |   |
|----------------------------------|---|
| <b>As of Date</b>                | The first date for which a report or process includes data.   |
| <b>BU or Business Unit</b>       | An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.  |
| <b>Description</b>               | Text up to 256 characters.  |
| <b>Short Description</b>         | Text up to 15 characters.   |
| <b>Effective Date</b>            | <p>Date that a table row becomes effective; the date that an action begins. For example, if you want to close a ledger on June 30, the effective date for the ledger closing would be July 1.</p> <p>This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row.</p> <p>See documentation <i>PeopleTools : Using PeopleSoft Applications</i>.</p> |
| <b>Language or Language Code</b> | The language of the field labels and report headings of reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.  |
| <b>Process Frequency</b>         | <p>Designates the appropriate frequency to process:</p> <p><i>Once</i>: Executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i>.</p> <p><i>Always Executes</i>: Executes the request every time the batch process runs.</p> <p><i>Don't Run</i>: Ignores the request when the batch process runs.</p>                                 |
| <b>Process Monitor</b>           | <p>View the status of submitted process requests.</p> <p>See documentation <i>PeopleTools : PeopleSoft Process Scheduler</i>.</p>   |
| <b>Report ID</b>                 | The report identifier.  |

|   |   |
|---|---|
| <b>Report Manager</b>   | View report content, check the status of a report, and see detailed messages.<br><br>See documentation <i>PeopleTools : PeopleSoft Process Scheduler</i> .      |
| <b>Run Control ID</b>   | A request identification that represents a set of selection criteria for a report or process.   |
| <b>Run</b>  | Specify the location where a process or job runs and the process output format.   |
| <b>Status</b>   | Check the progress of a report or process. A valid status is <i>Posted, Not Posted, Generated, Processing, or Scheduled</i> .                                   |
| <b>User ID</b>  | The system identifier for the individual who generates a transaction.   |
| <b>Instance or Prcs Instance (instance or process instance)</b> | The number that represents where the request is in the queue.<br><br>See the product documentation for <i>PeopleTools: PeopleSoft Applications User's Guide</i> |

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## Mobile Inventory Management Overview

The FSCM Mobile Inventory Management application provides tools to integrate mobile devices to the PeopleSoft Supply Chain Management system. This enables you to take advantage of the cost savings and efficiency improvements inherent in processes driven by mobile devices. Oracle ADF Mobile is used along with the PeopleSoft Integration Broker and PeopleSoft Web Services (including Component Interfaces).

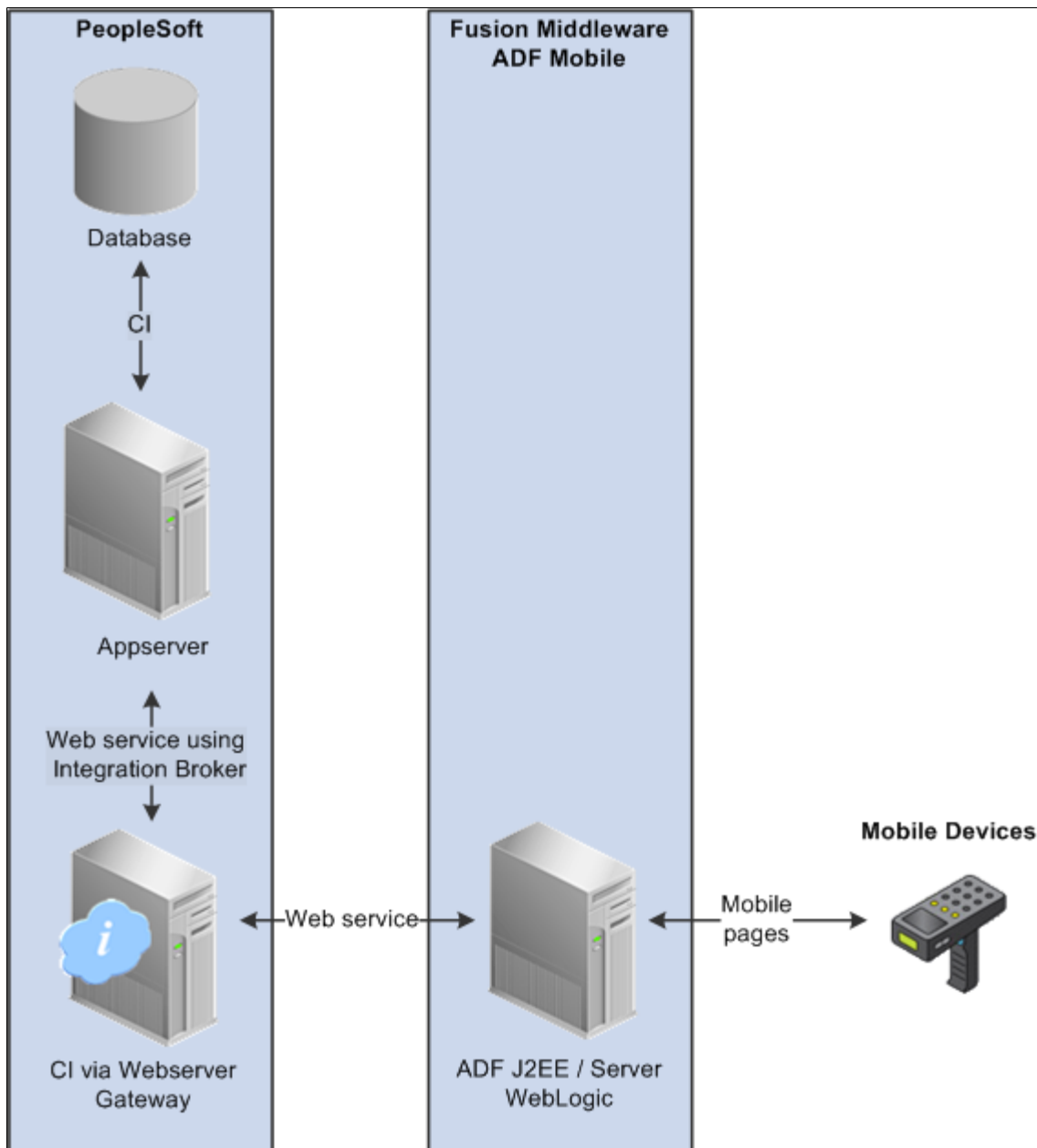
Use this documentation for common information about:

- Setting up PeopleSoft Mobile Inventory Management.
- Performing item stock inquiries using Mobile Inventory Management.
- Using mobile receiving.
- Using mobile delivery.
- Counting par locations using a mobile device.
- Counting inventory stock using a mobile device.

- Using mobile express issue.

**Image: Overview of the interface between PeopleSoft and mobile devices**

This diagram illustrates the flow of information from PeopleSoft to mobile devices:



The PeopleSoft system includes the:

- Database housing the PeopleSoft Financial Supply Chain Management applications. For PeopleSoft Mobile Inventory Management you must have also installed the PeopleSoft Inventory application.
- The application server which runs business logic and submits SQL to the database server.
- The webserver gateway is a platform that manages the receipt and delivery of messages passed among systems through PeopleSoft Integration Broker. PeopleSoft Integration Broker enables you to provide web services to other PeopleSoft systems and external integration partners.

The PeopleTools web service is identified in the Oracle Application Development Framework Mobile (ADF Mobile) software. The Oracle ADF Mobile software is a part of the Oracle Fusion Middleware. Oracle ADF Mobile browser extends Oracle ADF to browsers running on mobile devices. The Oracle ADF Mobile contains the mobile pages to display on the mobile device along with the login page and navigation breadcrumbs. The mobile pages are linked to the PeopleTools web service.

Oracle ADF Mobile provides AJAX features to support client-side data validation and partial page refresh. Pages on the mobile device are displayed with the ability to search for PeopleSoft data, include default values in a field, view additional details using links, view error messages, and use field prompts.

The mobile devices need to:

- Contain a bar code scanner.
- Use Microsoft Windows Mobile version 6.0 or higher.
- Run the Oracle ADF Mobile client web browser.

For more information on setting up PeopleSoft application servers and web servers, see documentation PeopleTools : System and Server Administration guide.

---

## Prerequisites and Considerations

This section discusses prerequisites and considerations to review prior to implementing the PeopleSoft Mobile Inventory Management 9.1 application.

These are prerequisites for the implementation of PeopleSoft Mobile Inventory Management for release 9.1:

- PeopleSoft Inventory 9.1 is installed and PeopleSoft FSCM Resolution ID 825837 is applied.

The setup of PeopleSoft Inventory 9.1 must be complete.

- (optional) PeopleSoft Purchasing 9.1 is installed.

To use the mobile receiving and mobile delivery features, the setup of PeopleSoft Purchasing 9.1 must be complete.

- The PeopleTools release must be 8.50 or greater.
- Oracle ADF (Application Development Framework) Mobile version 11.1.1.4 is installed and its initial setup tasks are completed.
- Security has been applied to your PeopleSoft user IDs to enable access to the PeopleSoft Mobile Inventory Management pages on the mobile devices.
- The mobile devices have been configured for optimal viewing of the PeopleSoft Mobile Inventory Management pages.

For more information on the prerequisites to using PeopleSoft Mobile Inventory Management, see the *PeopleSoft FSCM 9.1 Mobile Inventory Management Installation Guide* posted on My Oracle Support.

## Chapter 2

# Setting Up PeopleSoft Mobile Inventory Management

## Understanding Mobile Inventory Management Setup in PeopleSoft

In order to use PeopleSoft Mobile Inventory Management you must complete setup steps within your PeopleSoft environment. These steps customize PeopleSoft Mobile Inventory Management to your specific needs by setting up default values and mobile screen settings at the installation level and user level.

PeopleSoft Mobile Inventory Management uses web services to integrate your mobile devices with PeopleSoft. The following table lists the web services used for each of the mobile tasks and the component interface used with the service:

| <b>Service Operations</b>   | <b>Description</b>            | <b>Used by Mobile Tasks</b>  | <b>Component Interface</b> |
|-----------------------------|-------------------------------|--|----------------------------|
| MIN_ADJUSTMENT              | Adjustments                   | Adjustments  | ADJUSTMENT_INV             |
| MIN_ALT_TYPES_GET           | Alternate Item Type           | All  | N/A                        |
| MIN_BIN_TRANSFER            | Bin to Bin Transfers          | Bin to Bin Transfers   | MIN_NONCI_TRANS            |
| MIN_CART_COUNT_GET          | Get Par Locations for Mobile  | Par Count Par<br>Count Ad Hoc                                      | CART_COUNT_INV             |
| MIN_CART_COUNT_SAVE         | Save Par Locations for Mobile | Par Count Par<br>Count Ad Hoc                                      | CART_COUNT_INV             |
| MIN_COUNTING_EVENT_VALIDATE | Counting Event Validate       | Guided Count<br>Count By Item<br>Count By Location<br>Manual Count | N/A                        |
| MIN_COUNTING_EVENT_GET      | Inventory Counting Event Get  | Guided Count<br>Count By Item<br>Count By Location<br>Manual Count | N/A                        |

| <b>Service Operations</b>  | <b>Description</b>                         | <b>Used by Mobile Tasks</b>  | <b>Component Interface</b>   |
|----------------------------|--|--|--|
| MIN_COUNTING_EVENT_SET     | Inventory Counting Event Set               | Guided Count<br>Count By Item<br>Count By Location<br>Manual Count | COUNT_INV_CI used by Guided Count, Count by Item and Count by Location<br><br>COUNT_INV_INF used by Manual Count |
| MIN_EXPRESS_ISSUE          | Express Issue for Mobile                   | Express Issue  | EXPRESS_ISSUE_INV_CI   |
| MIN_EXPRESS_ISSUE_VALIDATE | Express Issue for Mobile Validation        | Express Issue  | N/A  |
| MIN_FUL_INQ_INV_DTL        | Fulfillment Inquiry for detail information | Fulfillment Inquiry  | MIN_FUL_INQ_INV_CI   |
| MIN_FUL_INQ_INV_HDR        | Fulfillment Inquiry for detail information | Fulfillment Inquiry  | MIN_FUL_INQ_INV_CI   |
| MIN_ITEM_STK_INQ           | Item Stock Inquiry for Mobile              | Item Stock Inquiry   | PUTAWAY_INQ_INV  |
| MIN_LOOKUP_GENERIC_GET     | Generic Lookup for Mobile                  | All  | N/A  |
| MIN_MENU                   | Mobile Menu Service                        | All  | N/A  |
| MIN_NPRCPT_SAVE            | Mobile Non-PO Receipt Service              | Receiving PO<br>Receiving Ad Hoc                                   | MIN_NPO_RECV_CI  |
| MIN_OPTIONS                | Mobile Inventory Options                   | All  | N/A  |
| MIN_PROMPT_EDIT            | Prompt table Edit Service                  | Receiving PO<br>Receiving Ad Hoc                                   | N/A  |
| MIN_RCPT_CNTR_GET          | Mobile Receiving Get                       | Receiving PO   | PO_RECEIPT_CI  |
| MIN_RCPT_CNTR_SAVE         | Mobile Receiving Save                      | Receiving PO   | MIN_PO_RECV_CI   |
| MIN_RECV_DELIVERY          | Mobile Delivery Get                        | Delivery   | RECV_DELIVERY_CI   |
| MIN_RECV_DELIVERY_SAVE     | Mobile Delivery Save                       | Delivery   | RECV_DELIVERY_CI   |
| MIN_STCK_FEEDBK_FIND       | Find Stockroom Find                        | Perform Putaway  | PUTAWAY_FEEDBK_MBL   |
| MIN_STCK_FEEDBK_GET        | Perform Putaway Get                        | Perform Putaway  | PUTAWAY_FEEDBK_MBL   |
| MIN_STCK_FEEDBK_SAVE       | Perform Putaway Save                       | Perform Putaway  | PUTAWAY_FEEDBK_MBL   |

Before working with the PeopleSoft Mobile Inventory Management pages on a mobile device, you will need to define options for the PeopleTools component interfaces.

A PeopleTools component interface (CI) enables exposure of a PeopleSoft component for synchronous access from another application. Component interfaces can be used to integrate one PeopleSoft application with another PeopleSoft application or with external systems. Component interfaces execute the business logic built into the PeopleSoft component and as a result, they provide a higher level of data validation.

A PeopleTools component interface (CI) has been created for each mobile page to be used on the mobile device. The CI is linked to a PeopleSoft component within the PeopleSoft application, such as PeopleSoft Inventory or PeopleSoft Purchasing. For example, the MIN\_NPO\_RECV\_CI has been created to interface a mobile device with the Receiving component in PeopleSoft Purchasing (Purchasing, Receipts, Add/Update Receipts).

PeopleTools component interfaces can be used to:

- Find data stored in the PeopleSoft application to display on the mobile device.
- Create new data in the PeopleSoft application by entering the data on the mobile device.
- Modify existing data in the PeopleSoft application by updating the data on the mobile device.
- Delete existing data in the PeopleSoft application using the mobile device.

The PeopleTools CIs are called through webservices to interact with Oracle ADF Mobile.

See the product documentation for

*PeopleTools: PeopleSoft Component Interfaces*

## Setting Up Component Interfaces for Mobile Inventory Management

This section discusses how to use the Setup Component Interfaces page.

### Page Used to Setup Component Interfaces for Mobile Inventory Management

| <i>Page Name</i>           | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|----------------------------|------------------------|---|---|
| Setup Component Interfaces | MIN_CMPINTFC           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Component Interfaces | Identify the component interface to be used for PeopleSoft Mobile Inventory Management functions. |

### Setup Component Interfaces Page

Use the Setup Component Interfaces page (MIN\_CMPINTFC) to identify the component interface to be used for PeopleSoft Mobile Inventory Management functions.

## Navigation

Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Component Interfaces

### Image: Setup Component Interfaces page (PO Receiving)

This example illustrates the fields and controls on the Setup Component Interfaces page (PO Receiving). You can find definitions for the fields and controls later on this page.

| Setup Component Interfaces            |         |   |                                  |
|---------------------------------------|---------|---|----------------------------------|
| Portal Object Name EPMIN_PO_RECEIVING |         | Receiving PO  |                                  |
| Setup Component Interfaces            |         | Personalize   Find   View All   [Grid Icon]   [Calendar Icon] |                                  |
|                                       |         | First [Dropdown] 1-4 of 4 [Dropdown] Last                     |                                  |
| *Component Interface Name             | *Method | Auth Actn   | User Defined                     |
| MIN_PO_RECV_CI                        | Create  | 4   | <input type="checkbox"/> [+] [-] |
| MIN_PO_RECV_CI                        | Save    | 4   | <input type="checkbox"/> [+] [-] |
| PO_RECEIPT_CI                         | Create  | 4   | <input type="checkbox"/> [+] [-] |
| PO_RECEIPT_CI                         | Save    | 4   | <input type="checkbox"/> [+] [-] |

The Setup Component Interfaces page displays the authorized actions for the component interfaces used by PeopleSoft Mobile Inventory Management. This is a display-only page. All settings have been defined for each component interface.

#### Portal Object Name

Identifies the Portal Content Reference where the menu is defined for the mobile transactions.

#### Component Interface Name

Identifies the name of the component interface used by the mobile transaction.

#### Method

Identifies the method that performs a specific function on a component interface at runtime. Methods include:

- *Create*: Creates a new instance of a component interface. This is equivalent to creating a new record in Add mode online. Returns True on success, and False on failure.
- *Save*: Saves an instance of a component interface. This is equivalent to clicking the Save button in the online system. Returns True on success, and False on failure.

#### Auth Actn (authorize action)

Identifies the Component Interface Method Access against the permission list. The method is authorized when this field displays 4 (Full Access).

#### User Defined

Identifies the component interface data for the mobile transactions. If this check box is selected then the CI data is user

defined and can be modified. If this check box is deselected then the CI data is system defined and cannot be modified.

## Setting Up Service Operations for Mobile Inventory Management

This section provides an overview of Mobile Inventory Management services operations and discusses how to:

- Access the Setup Mobile Services page.
- Activate service operations for Mobile Inventory Management.

### Pages Used to Setup Service Operations for Mobile Inventory Management

| <i>Page Name</i>              | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|-------------------------------|------------------------|--|--|
| Setup Mobile Services         | MIN_SERVICES           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Mobile Services   | Identify the service operations to be used for PeopleSoft Mobile Inventory Management functions. |
| Service Operations-General    | IB_SERVICE             | PeopleTools, Integration Broker, Integration Setup, Service Operations, General  | Define and activate a service operation.   |
| Service Operations-Handlers   | IB_SERVICEHDLR         | PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers   | Activate one or more service operation handlers.   |
| Service Operations - Routings | IB_SERVICERTNGS        | PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings   | Define and activate routing definitions on the service operation.                                |
| Routings - Parameters         | IB_ROUTINGDEFNDOC      | <ul style="list-style-type: none"> <li>• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the Details link attached to the routing.</li> <li>• PeopleTools, Integration Broker, Integration Setup, Routings, Parameters</li> </ul> | Verify the external service alias names used by this routing.                                    |
| Node Definitions              | IB_NODE                | PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions  | Activate node used by the service operation.   |

## Understanding Mobile Inventory Management Service Operations

Before working with the PeopleSoft Mobile Inventory Management pages on a mobile device, you will need to define settings for the service operations used by Mobile Inventory Management. These service operations are located within the PeopleTools Integration Broker.

The component interfaces (CI) created for Mobile Inventory Management are called from web service in the PeopleTools Integration Broker. Web Services are services published through the PeopleSoft Integration Broker that can pass transaction data between a PeopleSoft application and a third-party application, such as Oracle ADF Mobile. Each service contains one or more service operations.

In the case of PeopleSoft Mobile Inventory Management, the service and service operations are synchronous which provide a two-way communication to the PeopleSoft system. For example, the MIN\_NPO\_RECV\_CI is called from a MIN\_NPRCPT\_SAVE synchronous service and the MIN\_NPRCPT\_SAVE service operation to enable two-way communication between the Mobile Receiving Ad Hoc pages on the mobile device and the Receiving component in PeopleSoft Purchasing.

See the product documentation for

*PeopleTools: PeopleSoft Integration Broker*

## Setup Mobile Services Page

Use the Setup Mobile Services page (MIN\_SERVICES) to identify the service operations to be used for PeopleSoft Mobile Inventory Management functions.

### Navigation

Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Mobile Services

### Image: Setup Mobile Services page

This example illustrates the fields and controls on the Setup Mobile Services page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Setup Mobile Services' page. At the top, it displays 'Portal Object Name' as 'EPMIN\_PO\_RECEIVING' and 'Receiving PO'. Below this is a table with the following data:

| *Service           | *Service Operation | *Version | Active Flag |   |   |
|--------------------|--------------------|----------|-------------|---|---|
| MIN_RCPT_CNTR_GET  | MIN_RCPT_CNTR_GET  | v1       | Active      | + | - |
| MIN_RCPT_CNTR_SAVE | MIN_RCPT_CNTR_SAVE | v1       | Active      | + | - |

Use the Setup Mobile Services page to identify the service and service operation to be used for a specific Mobile Inventory Management task flow, such as displaying the Mobile Inventory Receiving pages on the mobile device.

**Service** Identifies the service within the PeopleSoft Integration Broker used for this mobile page.

**Service Operation** Identifies the service operation within the PeopleSoft Integration Broker used for this mobile page.

|  |   |
|--|---|
| <b>Service Operation Version</b>           | Identifies the version of the service operation used in this task flow.   |
| <b>Active Flag</b>                         | Displays the current status (active/disabled) of this service operation.  |
| <b>Control Flow Case</b>                   | Identifies the transaction flow for each mobile task in ADF mobile application.   |
| <b>Image Name</b>                          | Identifies the image file name and its location on the mobile server, This is the image that is displayed on the mobile menu for each transaction.  |
| <b>Authorized Actn (authorized action)</b> | Identifies the Component Interface Method Access against the permission list. The method is authorized when this field displays 4 (Full Access).  |
| <b>User Defined</b>                        | Identifies the component interface data for the mobile transactions. If this check box is selected then the CI data is user defined and can be modified. If this check box is deselected then the CI data is system defined and cannot be modified. |

## Activating Service Operations for Mobile Inventory Management

To activate the synchronous service operations for PeopleSoft Mobile Inventory Management, complete the following steps in PeopleSoft Integration Broker:

1. Activate the service operation.

On the General tab of the Service Operations component, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

2. Activate the service operation handlers.

On the Handlers tab of the Service Operations component, select the value of *Active* in the Status field for all needed handlers.

3. Activate the service operation routings.

On the Routings tab of the Service Operations component, activate a routing definition for each node that will send or receive data. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. You must activate at least one routing if the data is being sent in an XML format. Activate an inbound routing to receive data into PeopleSoft.

4. Verify the routing definition parameters.

On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.

5. Verify the node from the routing is active.

Go to the Node Definitions page and verify the Active Node check box has been selected for the node used in the routings that you activated on your Service Operations-Routings page.

## Setting Up Installation Options and User Preferences

PeopleSoft Mobile Inventory Management uses many of the fields within the PeopleSoft system to determine the default values or features available on a mobile page. These options and default setting are entered at the installation level or the individual user level.

### Pages Used to Setup Installation Options and User Preferences

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|---|------------------------|--|---|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory                                    | At the installation level, define default values or features available on a mobile page.  |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory    | At the individual user level, define default values or features available on a mobile page. These entries override the same fields on the Installation Options - Mobile Inventory page. |
| User Preferences - Overall Preferences  | OPR_DEF_TABLE_FS1      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Overall Preferences | Use the Business Unit field to identify the business unit to be displayed as the default value on the mobile page.  |

### Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to at the installation level, define default values or features available on a mobile page.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory

### Image: Installation Options - Mobile Inventory page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory page. You can find definitions for the fields and controls later on this page.

This page enables you to customize PeopleSoft Mobile Inventory Management to your specific needs at the installation level.

#### Key Concatenation Separator

Defines the symbol used to separate the values displayed on the mobile device. For example if a "\" is selected in this field then a material storage location consisting of the Zone B storage area and Aisle 2 storage level would display as "Zone B \ Aisle 2".

#### Role Name

Enter a role name. The role name entered here may be used for customization purposes in the Mobile Inventory Management application and may be a layer value that defines a specific user view of certain pages. The use of this value is optional.

#### Task Options (group box)

Define the default values or features available for a specific task flow. Use the Next Row icons to view and set up additional task flows.

#### Task Flow

Identifies the business process to be performed on the mobile device; examples include, entering an express issue, receiving stock, or counting inventory in par locations. A task flow can contain one or more mobile pages.

The task flow selected in this field determines the additional fields on this page.

---

**Note:** For the remaining field definitions that are on this page, please see the topic and section in this documentation for the specific task flow.

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## User Preferences - Mobile Inventory Page

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to at the individual user level, define default values or features available on a mobile page.

These entries override the same fields on the Installation Options - Mobile Inventory page.

### Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory

### Image: User Preferences - Mobile Inventory page.

This example illustrates the fields and controls on the User Preferences - Mobile Inventory page.

The screenshot displays the 'User Preferences - Mobile Inventory' page. At the top, there are tabs for 'User Preferences' and 'Mobile Inventory'. Below the tabs, the user's details are shown: 'User ID' is VP1, 'Supplier' is Default Operator, and 'Role Name' is MIN Administrator. The main section is titled 'Task Options' and contains several controls: a dropdown menu for 'Task Flow' set to 'Par Count', a checkbox for 'Use Installation Values', a text input for 'Rows Displayed' with the value '10', a dropdown for 'Initial Display Mode' set to 'All Items', and a dropdown for 'Alternate Item Display' set to 'Item Only'. Below these are a list of checkboxes, all of which are checked: 'Expert Mode', 'Display Lookups', 'Display Description', 'Collapse Header', 'Display Filter Related Fields', 'Display Prior Entry Caption', 'Display Show/Hide in tables', 'Suppress Unique Compartments', and 'Filter All Alternate Items'. Navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last' are also visible.

This page enables you to customize PeopleSoft Mobile Inventory page for an individual user. The fields displayed in this component are the same as the Installation Options - Mobile Inventory page. This page is optional; the Installation Options - Mobile Inventory page is used when a user ID does not have this page defined or when the Use Installation Values check box is selected.

To review field definitions for this page, see the topics in this document for the specific task flow identified in the Task Flow field.

## Setting Up Alternative Item Identifiers

This section provides an overview of the Alternative Item Identifiers feature and discusses how to define alternate item groups.

### Pages Used to Set Up Alternate Item Identifiers

| <i>Page Name</i>                       | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|--|------------------------|--|--|
| Manufacturers                          | MANUFACTURER           | Items, Define Controls, Manufacturers  | Set up manufacturers to be used with universal item IDs and with manufacturer's item IDs.  |
| Define Item - Manufacturer's Item      | ITM_MFG_SP             | Items, Define Items and Attributes, Define Item, General.<br><br>Click the Manufacturers link on the Define Item - General: Common page. | Define items identification codes used by one or more manufacturers of this item. This page links the manufacturer's item ID to the item ID (MASTER_ITEM_TBL).   |
| Supplier - Identifying Information     | VNDR_ID1               | Suppliers, Supplier Information, Add/Update, Supplier, Identifying Information   | Define suppliers used in your PeopleSoft system.   |
| Purchasing Attributes - Item Supplier  | ITM_VENDOR             | Items, Define Items and Attributes, Purchasing Attributes, Item Supplier   | Define item identification codes used by one or more suppliers of this item. This page links the supplier's item ID to the item ID (MASTER_ITEM_TBL).  |
| Product Definition - Definition        | PROD_DEFN              | Products, Identify Product Details, Definition   | Define a product ID to be used in the Customer Fulfillment Management applications such as PeopleSoft Order Management, PeopleSoft Billing and PeopleSoft Product Configurator. The product ID can be linked to an item ID (MASTER_ITEM_TBL) on this page. |
| Define Item - General: Classifications | INV_ITEMS_DEFIN4       | Items, Define Items and Attributes, Define Item, General<br><br>Click the Classifications link.  | Enter the Universal Product Code (UPC) to be linked with the item ID (MASTER_ITEM_TBL).  |

| <b>Page Name</b>                             | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>   |
|--|------------------------|--|--|
| Universal Item ID Types                      | UPN_TYPE_CD            | Items, Define Controls, Universal Item ID Types  | <p>Set up universal item identifier types.</p> <p>See documentation PeopleSoft Managing Items , Working with Items, Using Universal Item Identifiers.</p>  |
| Universal Item Identifiers                   | ITM_MFG_UPN            | Items, Define Items and Attributes, Universal Item Identifiers   | <p>Set up universal item IDs.</p> <p>See documentation PeopleSoft Managing Items , Working with Items, Using Universal Item Identifiers.</p>   |
| Alternate Item Groups                        | IN_ALT_ITEM_GROUPS     | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Alternate Item Groups                                   | <p>Create and maintain alternate item groups to define the alternate item types used.</p> <p>Valid alternate types include <i>Mfg Item ID, Product ID, UPC Code, UPN</i> , or <i>Supplier Item ID</i>.</p>   |
| Inventory Definition - Business Unit Options | BUS_UNIT_INV5          | Set Up Financials/Supply Chain, Business Unit Related, Inventory, Inventory Definition, Business Unit Options              | <p>Identify an alternate item group for an inventory business unit in the Mobile Inventory group box.</p> <p>The business unit for each mobile inventory task flow determines if alternate item identifiers are being used. The business unit for the task flow can be an Inventory business unit. If a value is selected in the Alternate Group field for the Inventory business unit, then the task flow uses alternate items.</p> |
| Purchasing Definition - Mobile Receiving     | BU_OPT_MOBILE_REC      | Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition. Click the Mobile Receiving link. | <p>Identify an alternate item group for an purchasing business unit.</p> <p>The business unit for each mobile inventory task flow determines if alternate item identifiers are being used. The business unit for the task flow can be a Purchasing business unit. If a value is selected in the Alternate Group field for the Purchasing business unit, then the task flow uses alternate items.</p>                                 |

| <b>Page Name</b>                        | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>   |
|---|------------------------|---|--|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory                                 | For each task flow, you can select the options for the Alternate Item Display field or the Filter All Alternate Items check box.   |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory | (optional) At the individual user level and for each task flow, you can select the options for the Alternate Item Display field or the Filter All Alternate Items check box. |

## Understanding Alternative Item Identifiers

This section provides reviews about:

- Identifying items.
- Using Alternative Item Identifiers on the main transaction pages.
- Using Alternative Item Identifiers on the Look Up Item ID page.
- Setting up the Alternative Item Identifiers feature.

### Identifying Items

When entering or selecting items, a user doesn't always know the item ID stored in the MASTER\_ITEM\_TBL record. The Alternative Item Identifiers feature within PeopleSoft Mobile Inventory Management can use alternate item IDs to determine a specific item ID. Within PeopleSoft Mobile Inventory Management, item identifiers include:

**Item ID (MASTER\_ITEM\_TBL)** The item ID required to identify any item in the PeopleSoft system and used as the primary search key in the PeopleSoft system. This core item ID is located in the item master ( MASTER\_ITEM\_TBL) record and can be displayed on the Define Items component (Items, Define Items and Attributes, Define Item). The fields in the MASTER\_ITEM\_TBL record are the basic setup to add a new item to the PeopleSoft system.

### Alternate Item

A different item identification recorded within the PeopleSoft system. The alternate item IDs that can be used by the Alternative Item Identifiers feature are:

- *Product ID:* This code is used to identify items sold in your enterprise using the Customer Fulfillment Management applications such as PeopleSoft Order Management. The product ID (in the PROD\_ITEM record) can be linked to an item ID (MASTER\_ITEM\_TBL).
- *Manufacturers Item ID:* This code is used to identify the item ID used by the manufacturer of the item. Manufacturers item IDs are recorded in the ITEM\_MFG record. Multiple

manufacturer item IDs can be linked to one item ID (MASTER\_ITEM\_TBL).

- *Supplier Item ID*: This code is used to identify the item ID used by the supplier who supplies the item. Suppliers are mainly used by the Supplier Relationship Management applications such as PeopleSoft Purchasing. Supplier item IDs are recorded in the ITM\_VENDOR record. Multiple supplier item IDs can be linked to one item ID (MASTER\_ITEM\_TBL).
- *UPC Code*: The Universal Product Code (in the INV\_ITEMS record) can be entered on the Define Item - General: Classifications page for a specific item ID (MASTER\_ITEM\_TBL).
- *Universal Item IDs (UPN)*: The universal item ID feature enables you to maintain and store Universal Product Numbers (UPN), Global Trade Item Numbers (GTIN), and other industry item identifiers within the PeopleSoft system. All UPN IDs are recorded in the ITEM\_MFG\_UPN\_FS record.

## Using Alternative Item Identifiers on the Main Transaction Pages

For many task flows, the main transaction page includes an Item field to search for information. For example, the main transaction page for the Bin to Bin Transfer task flow contains the Item field to search for an item ID (MASTER\_ITEM\_TBL) that is being transferred.

**Image: The main transaction page for the Bin to Bin Transfer task flow.**

This example illustrates the fields and controls on the The main transaction page for the Bin to Bin Transfer task flow.

### Item

If the Alternative Item Identifiers feature has not been enabled for the task flow, then this field can only be used to enter an item ID from the MASTER\_ITEM\_TBL record.

If the Alternative Item Identifiers feature has been enabled for the task flow, then this field can be used to enter an alternative item ID as well as an item ID from the MASTER\_ITEM\_TBL

record. For example, if the user enters MED00871 in the Item field, the system determines that this is a manufacturer's item ID and locates the item ID (MASTER\_ITEM\_TBL) linked to MED00871. Using the Alternative Item Identifiers feature, the system performs the following search steps when a value is entered in the Item field:

1. If the value is a valid item ID (MASTER\_ITEM\_TBL), then the system uses the item ID and does not search for an alternate item identifier.
2. If the value is not a valid item ID (MASTER\_ITEM\_TBL), then the system looks for a match for an alternate identifier type.
3. If the value entered is not a valid item ID (MASTER\_ITEM\_TBL) and the system finds only one match to an alternate item identifier, then the system displays the item ID (MASTER\_ITEM\_TBL), the alternate item ID, or both.
4. If the value entered is not a valid item ID (MASTER\_ITEM\_TBL) and the system finds more than one item matched to an alternate item identifier, then the system displays an error that indicates that multiple matches were found. The user can then use the other fields located in the *Alternate* collapsible region of the Look Up Item ID page to do a specific look up using just one of the alternate item value fields.
5. If no item ID (MASTER\_ITEM\_TBL) or alternate item ID is found for the task flow, then the system displays an error.

### Fetch

Click this button to perform a search for the value in the Item field. On the main transaction page, the system can only return one item and displays only the item ID (MASTER\_ITEM\_TBL).



**(Look Up Icon)**

Click the Look Up icon beside the Item field to access the Look Up Item ID page where you can perform additional searches based on the item ID (MASTER\_ITEM\_TBL) or an alternate item ID.

## Using Alternative Item Identifiers on the Look Up Item ID Page

On the main transaction page, use the Look Up icon beside the Item field to access the Look Up Item ID page.

### Image: Look Up Item ID page

This example illustrates the fields and controls on the Look Up Item ID page. You can find definitions for the fields and controls later on this page.

| Item     | Descr    |
|----------|----------|
| TEST_LOT | TEST_LOT |

If alternate item identifiers are enabled for a task flow in PeopleSoft Mobile Inventory Management, then additional fields appear in the Look Up Item ID page. These additional fields are located within a collapsible region with the title *Alternate*. This region contains these additional fields: Alternate, MFG Item, Supplier Item, UPN, Product, and UPC.

### Alternate

Enter any type of item ID (MASTER\_ITEM\_TBL) or alternate item ID. When the user clicks the Look Up button the system searches for the item ID (MASTER\_ITEM\_TBL) that is linked to the value entered. For example, if the user enters MED00871 in the Alternate field, the system determines that this is a manufacturer's item ID and locates the item ID (MASTER\_ITEM\_TBL) linked to MED00871. When a user enters a value in the Alternate field, the system performs the following search steps:

1. If the value is a valid item ID (MASTER\_ITEM\_TBL), then the system displays the item ID in the search results and does not search for an alternate item identifier.
2. If the value is not a valid item ID (MASTER\_ITEM\_TBL), then the system looks for a match for an alternate identifier type. The search results are displayed on the bottom of the page and can include multiple matches to the value.
3. If no item ID (MASTER\_ITEM\_TBL) or alternate item ID is found, then the search results section is blank.

|                             |   |
|-----------------------------|---|
| <b>MFG Item</b>             | The system searches for only a manufacturer's item ID matching the value in this field.   |
| <b>Supplier Item</b>        | The system searches for only a supplier item ID matching the value in this field.   |
| <b>UPN</b>                  | The system searches for only a universal item ID matching the value in this field. UPN identifiers can include Universal Product Numbers (UPN), Global Trade Item Numbers (GTIN), and other industry item identifiers within the PeopleSoft system. |
| <b>Product</b>              | The system searches for only a product ID matching the value in this field.   |
| <b>UPC</b>                  | The system searches for only a UPC code matching the value in this field.   |
| <b>Look Up</b>              | Click this button to perform a search based on the criteria entered above.  |
| <b>Item and Description</b> | Displays the search results. Only the item ID and description from the MASTER_ITEM_TBL record are displayed.  |

---

**Note:** The Item field located in the Look Up Item ID page only searches for item IDs located in the MASTER\_ITEM\_TBL record. It does not use alternate item IDs.

---

**Note:** If the Filter All Alternate Items check box is not selected for the Par Count task flow, then the Alternate region does not appear on the Look Up Item ID page. Only the fields that are in the Standard region appear. This can improve performance.

---

## Setting Up the Alternative Item Identifiers Feature

The setup of the Alternative Item Identifiers feature within PeopleSoft Mobile Inventory Management determines:

- If alternate item IDs can be used with the main transaction page or the Look Up Item ID page of the task flow.
- Which alternate item ID are used and which alternate item IDs are excluded. For example, manufacturer's item ID might be included but supplier item ID is excluded from the search. If a field is excluded, then it does not display in the *Alternate* collapsible region of the Look Up Item ID page.
- How the search results are displayed on the main transaction page of a task flow. The alternate item ID, the item ID (MASTER\_ITEM\_TBL), or both can be displayed in the search results.
- If you allow alternate item IDs to be searched when filtering a table.

To set up alternative items to be used with the Alternate Item Identifiers feature:

### 1. Define alternate item IDs:

- *Product ID:* This code is used identify items sold in your enterprise using the Customer Fulfillment Management applications such as PeopleSoft Order Management. The product ID can be linked to an item ID (MASTER\_ITEM\_TBL) on the Product Definition - Definition page.

- *Manufacturers Item ID*: This code is used to identify the item ID used by the manufacturer of the item. Define each manufacturer used on the Manufacturers page, then use the Define Item - Manufacturer's Item page to enter the manufacturer's item ID for a specific item ID (MASTER\_ITEM\_TBL). Multiple manufacturers can be linked to one item ID (MASTER\_ITEM\_TBL).
  - *Supplier Item ID*: This code is used to identify the item ID used by the supplier of the item. Suppliers are mainly used by the Supplier Relationship Management applications such as PeopleSoft Purchasing. Define each supplier on the Supplier - Identifying Information page, then use the Purchasing Attributes - Item Supplier page to enter the supplier's item ID for a specific item ID (MASTER\_ITEM\_TBL). Multiple suppliers can be linked to one item ID (MASTER\_ITEM\_TBL).
  - *UPC Code*: The Universal Product Code (UPC) can be entered on the Define Item - General: Classifications page for a specific item ID (MASTER\_ITEM\_TBL).
  - *Universal Item IDs (UPN)*: The universal item ID feature enables you to maintain and store Universal Product Numbers (UPN), Global Trade Item Numbers (GTIN), and other industry item identifiers within the PeopleSoft system. To define universal item ID types, universal item identifiers, and manufacturers, use the Universal Item ID Types page (UPN\_TYPE\_CD), Universal Item Identifiers page (ITM\_MFG\_UPN), and the Manufacturers page (MANUFACTURER).
2. Create alternate item groups. Use the Alternate Item Groups page to define the alternate item IDs to be used within PeopleSoft Mobile Inventory Management. Only the alternate items IDs listed on this page are used when searching for the matching item ID.
  3. Assign alternate item groups to the Inventory or Purchasing business units. The business unit for each mobile inventory task flow determines if alternate item identifiers are being used. The business unit for the task flow can be a Purchasing or an Inventory business unit. If a value is selected in the Alternate Item Group field for the Purchasing or Inventory business unit, then the task flow uses alternate items. This impacts what is displayed when looking up items. Use the Inventory Definition - Business Unit Options page to update the Inventory business unit and use the Purchasing Definition - Mobile Receiving page to update the Purchasing business unit.
  4. Update alternate item options on the Installation Options - Mobile Inventory page. Within each task flow:
    - The Alternate Item Display field enables you to determine how the search results are displayed on the main transaction page. The item ID from the (MASTER\_ITEM\_TBL) record can be displayed, the alternate item ID can be displayed, or both can be displayed. When displaying both, you can choose if the item ID or the alternate item ID is displayed as the primary item.
    - The Filter All Alternate Items check box allows alternate item IDs to be searched when filtering a table. Note that selecting the Filter All Alternate Items check box can impact system performance.
  5. (Optional) For an individual user, you can use the User Preferences - Mobile Inventory page to change the Alternate Item Display field or the Filter All Alternate Items check box. These options are set at the overall level on the Installation Options - Mobile Inventory page.

## Alternate Item Groups Page

Use the Alternate Item Groups page (IN\_ALT\_ITEM\_GROUPS) to create and maintain alternate item groups to define the alternate item types used.

Valid alternate types include Mfg Item ID, Product ID, UPC Code, UPN , or Supplier Item ID.

### Navigation

Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Alternate Item Groups

### Image: Alternate Item Groups page

This example illustrates the fields and controls on the Alternate Item Groups page. You can find definitions for the fields and controls later on this page.

### Alternate Item Groups

**SetID:** SHARE

**Group:** JIMAIG

**Description:**

| Alternate Types |                  | Personalize    | Find | First                               | 1-8 of 8 | Last  |
|-----------------|------------------|----------------|------|-------------------------------------|----------|---|
| #               | *Alternate Type  | UPII Type Code |      |                                     |          |   |
| 1               | UPN              | GTIN           |      | <input checked="" type="checkbox"/> |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 2               | UPN              | HI             |      | <input type="checkbox"/>            |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 3               | UPN              | SKU            |      | <input checked="" type="checkbox"/> |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 4               | UPN              | UK             |      | <input type="checkbox"/>            |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 5               | Mfg Item ID      |                |      | <input type="checkbox"/>            |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 6               | Supplier Item ID |                |      | <input type="checkbox"/>            |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 7               | Product ID       |                |      | <input type="checkbox"/>            |          | <input type="button" value="+"/> <input type="button" value="-"/> |
| 8               | UPC Code         |                |      | <input type="checkbox"/>            |          | <input type="button" value="+"/> <input type="button" value="-"/> |

Use the Alternate Item Groups page to define the alternate item IDs to be used within PeopleSoft Mobile Inventory Management. Only the alternate items IDs listed on this page are used when searching for the matching item ID. For example, if you do not include Product ID in the Alternate Types column then the system does not retrieve the item ID based on a valid product ID.

### Alternate Type

Select the type of alternate item. Options include *Mfg Item ID*, *Product ID*, *UPC Code*, *UPN* (Universal Product Number), or *Supplier Item ID*.

If you select *UPN* in this field, then you must select an option in the UPN Type Code field. The universal item identifiers feature within PeopleSoft enables you to maintain and store Universal

Product Numbers (UPN), Global Trade Item Numbers (GTIN), and other industry item identifiers.

**UPN Type Code (universal product number type code)**

If you are using the universal item identifiers feature within PeopleSoft, use this field to select the UPN type code (universal item identifiers ID) for the row. This code is defined on the Universal Item ID Types page.

**Default UOM (default unit of measure)**

Select to indicate that the associated UOM should be used by the system as a default for the transaction. This option is only available when *UPN* is selected in the Alternate Type field. The UOM is defined on the Universal Item Identifiers page.

---

## Accessing Mobile Inventory Management from a Mobile Device

To access PeopleSoft Mobile Inventory Management using a mobile device:

1. On your mobile device, open the PeopleSoft Mobile Inventory Management application by selecting Start – Internet Explorer.
2. Enter the URL for the PeopleSoft Mobile Inventory Management application. You could also add the URL as a favorite for access through the Menu - Favorites menu.
3. Log in to the PeopleSoft Mobile Inventory Management application using your PeopleSoft user name and password.

## Chapter 3

# Performing Item Stock Inquiries Using Mobile Devices

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## Understanding Mobile Inventory Management Item Stock Inquiries

Use the Item Stock Inquiry page on a mobile device to check the stock quantities of items within a PeopleSoft Inventory business unit. Using the Item Stock Inquiry page, enter the PeopleSoft Inventory business unit and the item ID to display the stock quantities within the material storage locations of the business unit.

Additional information can also be displayed including; serial IDs, lot IDs, any storage containers that hold the stock, the item status of the stock (Open, Restricted, Hold, or Rejected), staged date, nettable status, and if the stock is non-owned.

To review item stock levels using a mobile device:

1. Select the Item Stock Inquiry component on the PeopleSoft Mobile Inventory main menu.
2. Verify the business unit is the correct inventory business unit on the Item Stock Inquiry page.
3. Scan or enter the item ID in the Item field.
4. Click the Fetch button.

The system provides inventory information about the item that you selected including the total quantity of the item, all of its locations, and the quantities at each location.

### Additional Fields Available for the Item Stock Inquiry Page

The following fields from PeopleSoft Inventory can be displayed on the Item Stock Inquiry page of the mobile device if you customize your display. These fields are provided through the web service.

- The Last Transaction and Last Transaction Date fields can display the type of transaction and the date of the last activity performed on this item stock.
- The Available Quantity field includes all item stock in an open inventory status that has not been reserved, allocated, promised, backordered or pegged. The Available Quantity value can help you determine the stock available to fulfill orders or transfer requests.

---

## Defining Setup and Installation Options for Item Stock Inquiries

You use the PeopleSoft system to define options that determine how PeopleSoft Mobile Inventory Management is used on mobile devices. These options determine the default values or features available

on the Item Stock Inquiry page. The following PeopleSoft pages are used to define component interfaces, services, default values, and features for the Item Stock Inquiry page displayed on a mobile device.

This section discusses how to:

- Define installation options for Item Stock inquiries.
- Define user preferences for Item Stock inquiries.

## Pages Used to Define Setup and Installation Options for Item Stock Inquiries

| <b>Page Name</b>                       | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>   |
|--|------------------------|---|--|
| Setup Component Interfaces             | MIN_CMPINTFC           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Component Interfaces | Define the component interface for the Item Stock Inquiry mobile page.   |
| Setup Mobile Services                  | MIN_SERVICES           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Mobile Services      | Identify and setup the PeopleSoft Integration Broker services to be used with the Item Stock Inquiry mobile page.  |
| Mobile Inventory Installation          | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory               | Define Mobile Inventory installation options at the system level. These options determine what features are available on the mobile devices and how the mobile page should appear. For the Item Stock Inquiry page, use the value of <i>Item Stock Inquiry</i> in the Task Flow field. |
| User Preferences – Overall Preferences | OPR_DEF_TABLE_FS1      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Overall Preferences     | Use the Business Unit field to define the default Inventory business unit for the user. The unit is used on the Item Stock Inquiry page on the mobile device.  |
| Mobile User Task Options               | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences                          | Define user preferences for Item Stock inquiries. For individual users, you define options to determine what features are available on the mobile devices and how the mobile page should appear.   |

### Mobile Inventory Installation Page

Use the Mobile Inventory Installation page (INSTALLATION\_MIN) to define Mobile Inventory installation options at the system level.

These options determine what features are available on the mobile devices and how the mobile page should appear. For the Item Stock Inquiry page, use the value of Item Stock Inquiry in the Task Flow field.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory

### Image: Installation Options - Mobile Inventory page (Item Stock Inquiry)

This example illustrates the fields and controls on the Installation Options - Mobile Inventory page (Item Stock Inquiry). You can find definitions for the fields and controls later on this page.

Use this page to define default values for Mobile Inventory Item Stock Inquiry page.

#### Task Flow

Identifies the Mobile Inventory page or menu option that uses the settings on this page. Enter the value of *Item Stock Inquiry* to define installation-level options for the Item Stock Inquiry page.

#### Rows Displayed

Enter the maximum number of items to display in the search results of the Item Stock Inquiry page. You can scroll through additional data by using the Next link.

#### Alternate Item Display

Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: Alternate Only, Alternate as Primary, Item Only, and Item as Primary.

See [Setting Up Alternative Item Identifiers](#).

#### Display Lookups

Select this check box to display the Lookup icon for the business unit and item fields at the top of the Item Stock Inquiry page on the mobile device. The Lookup icon enables you to view a list of values and select one.

#### Display Filter Related Fields

Select this check box to display the Filter field and Filter button on the Item Stock Inquiry page. Deselect the check box to remove the filter functionality from the Item Stock Inquiry page.

**Display Show/Hide in tables**

Select to display the Show/Hide icon in the storage locations area of the Item Stock Inquiry page. This option enables you to expand or collapse additional location information.

See [Installation Options - Mobile Inventory Page](#).

**Mobile User Task Options Page**

Use the Mobile User Task Options page (MIN\_USER\_TASK\_OPT) to define user preferences for Item Stock inquiries.

For individual users, you define options to determine what features are available on the mobile devices and how the mobile page should appear.

**Navigation**

Set Up Financials/Supply Chain, Common Definitions, User Preferences

This page enables you to customize Item Stock Inquiry page for an individual user. The fields displayed in this component are the same as the Mobile Inventory Installation page. Select the Use Installation Values check box to use the values defined for installation options. When you select the check box the remaining check boxes are no longer available for entry, and the system uses the installation values for Item Stock inquiries.

**Related Links**

[Defining Setup and Installation Options for Item Stock Inquiries](#)

**Performing Mobile Inventory Management Item Stock Inquiries**

This section discusses how to:

- Use the Item Stock Inquiry page.
- View additional item stock details.

**Pages Used to Perform Mobile Inventory Item Stock Inquiries**

These Mobile Inventory pages are used for Item Stock inquiries:

| <b>Page Name</b>                                  | <b>Navigation</b>  | <b>Usage</b>                        |
|---|--|-------------------------------------|
| Item Stock Inquiry                                | Mobile Inventory, Item Stock Inquiry   | Use the Item Stock Inquiry page.    |
| Item Stock Inquiry (with additional item details) | Mobile Inventory, Item Stock Inquiry and click the Expand icon in the search results | View additional item stock details. |

## Item Stock Inquiry Page

### Navigation

Mobile Inventory, Item Stock Inquiry

### Image: Item Stock Inquiry page

This example illustrates the fields and controls on the Item Stock Inquiry page. You can find definitions for the fields and controls later on this page.

You can use a mobile device to check the current stock levels of an item within a PeopleSoft Inventory business unit.

### Unit

Displays the PeopleSoft Inventory business unit where the item stock is located. A default value displays in this field based on your user login ID. This is a required field.

### Item

Scan or enter the PeopleSoft inventory item ID for the stock you want to review. Based on setup at the installation level, you can enter other item identification numbers such as alternate item identifiers.

After entering an item in this field, you can tab out of the field or click the fetch button. The system clears the item field and displays the entered item, alternate item, of both (depending on the Alternate Display option) in the Item Information group box.

In addition, the system lists the location, quantity and UOM in the grid below.

See [Setting Up Alternative Item Identifiers](#).



**(Lookup icon)**

Click the Lookup icon to access the Lookup page where you can search for field values. On the Item Stock Inquiry page, the Lookup icon enables you to search for business units and items.

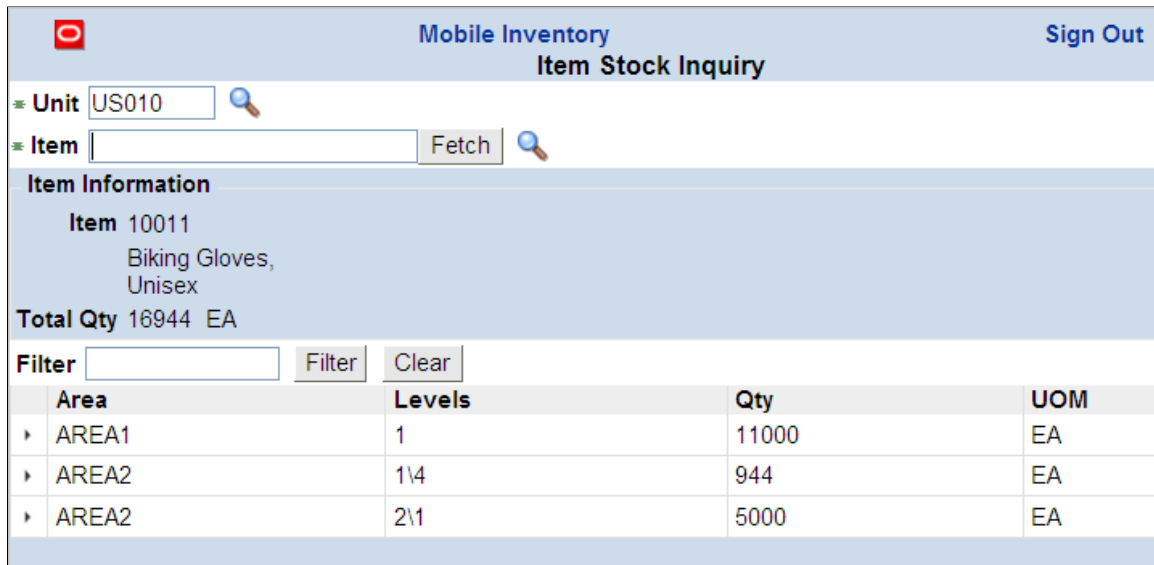
### Fetch

Click to initiate a search for the business unit and item combination. The results are displayed below in the Item

Information area. The fetch is also initiated when you tab out of the Item field.

**Image: The Item Stock Inquiry page with search results**

This example illustrates the fields and controls on the The Item Stock Inquiry page with search results. You can find definitions for the fields and controls later on this page.



**Item (within the Item Information group box)**

Displays the PeopleSoft Inventory item ID and item description. The Item Information table displays item stock information at the PeopleSoft Inventory business unit level.

A description of the item appears below the item ID.

**Total Qty (total quantity in the Item Information group box)**

Displays the total item quantity within the PeopleSoft Inventory business unit expressed in the standard unit of measure for the item. The total quantity will vary based on the filtered locations.

---

**Note:** The Available Quantity value (reflecting the total item quantity that you can use to fulfill demand) can be displayed on this page if needed.

---

**Filter (field and button)**

Use the Filter feature to limit your existing search results to rows that meet your criteria. This feature reduces the original search results to a smaller number of rows so that you can focus on your area of interest.

Use the Filter field to enter a value, such as storage area, to compare to the existing search results. The filter will search the following fields; Storage Area, Levels, Units of Measure, Serial ID, Lot ID, and Container.

Click the Filter button to apply your filter value to the existing search results and display only the rows that match your filter. The filter feature is also initiated when you tab out of the Filter field. For example, if you enter AREA1, then the search results

are reduced to display only the rows with the storage area name AREA1.

---

**Note:** The Filter feature is applied to the existing search results and does not perform another search on data within PeopleSoft.

---

#### Clear

Click the Clear button to restore your original search results after applying a filter. This button removes the filter and displays all search rows.

---

**Note:** The Clear button does not perform another search on data within the PeopleSoft system.

---



#### Expand

Click the Expand icon to display additional information about the row of item stock; including a storage container that holds the stock, the item status of the stock (Open, Restricted, Hold, or Rejected), staged date, nettable status, and if the stock is non-owned.



#### Collapse

Click the Collapse icon to hide additional information about the row of item stock.

#### Area

Displays the storage area containing the stock.

#### Levels

Displays the storage levels containing the stock. Item stock is stored in a material storage location that consists of a storage area and storage levels.

A storage area can be divided into a maximum of four storage levels, with each level representing a physical subdivision of the area. For example, you might have a three-level warehouse area consisting of 15 aisles, with 10 cabinets per aisle and 5 shelves per cabinet.

#### QTY (quantity)

Displays the item quantity currently in the material storage location. This quantity is the entire item quantity within the location regardless of the stock state; it includes stock that is in various fulfillment states as well as stock in all the item statuses (Open, Restricted, Hold, or Rejected).

#### UOM (unit of measure)

Displays the unit of measure for the storage location.

#### Serial ID

Displays the serial identification numbers for the item stock in this location. This field only displays if the item is serial-controlled.

#### Lot ID

Displays the lot identification numbers for the item stock in this location. This field only displays if the item is lot-controlled.

## Viewing Additional Item Information

Use the additional item information section to view additional item stock details.

## Navigation

Mobile Inventory, Item Stock Inquiry and click the Expand icon in the search results

### Image: The Item Stock Inquiry page with additional information in the search results

This example illustrates the fields and controls on the The Item Stock Inquiry page with additional information in the search results. You can find definitions for the fields and controls later on this page.

**Mobile Inventory** Sign Out

**Item Stock Inquiry**

Unit

Item

**Item Information**

Item 10011  
Biking Gloves,  
Unisex

Total Qty 16944 EA

Filter

| Area   | Levels | Qty   | UOM |
|--|--------|-------|-----|
| AREA1  | 1      | 11000 | EA  |
| <b>Status</b> Open                           |        |       |     |
| <b>Staged Date</b> 01/01/1900                |        |       |     |
| <input checked="" type="checkbox"/> Nettable |        |       |     |
| <input type="checkbox"/> NonOwned            |        |       |     |
| AREA2  | 1/4    | 944   | EA  |
| AREA2  | 2/1    | 5000  | EA  |

Use the expanded section to view additional information about the item in this location. To collapse the section, click the Collapse icon for the row of data.

#### Container

Displays the storage container holding the stock. If the stock is not in a storage container, this field does not display.

#### Status

Displays the item status of the stock. The options are: Open, Restricted, Hold, or Rejected.

#### Staged Date

Displays the stage date of the stock. Staged-date tracking enables you to track all stocked items according to the date that they were put into inventory.

If stage date tracking is not used in the environment, then the value of *01/01/1900* is displayed.

#### Nettable

This check box is selected if the stock in this location can be used to fulfill demand from stock requests or other orders.

#### NonOwned

This check box is selected if the stock is not-owned or consigned. This check box is deselected if the PeopleSoft Inventory business unit owns the items stored in this material storage location.

## Chapter 4

# Using Mobile Receiving

## Understanding How to Receive Stock in PeopleSoft Inventory Using Mobile Receiving

The Mobile Receiving task flow integrates with the PeopleSoft Purchasing system to receive and put away received goods. Receiving rules are defined in the PeopleSoft system business processes leading up to the actual receipt. These processes include setting up items and creating requisitions and purchase orders. Mobile Receiving leverages this base information, and makes the process of receiving goods more efficient and accurate and moves data into the PeopleSoft system in real time.

**Note:** To make changes to a receipt after an item has been received, you need to use the PeopleSoft system online Receiving pages.

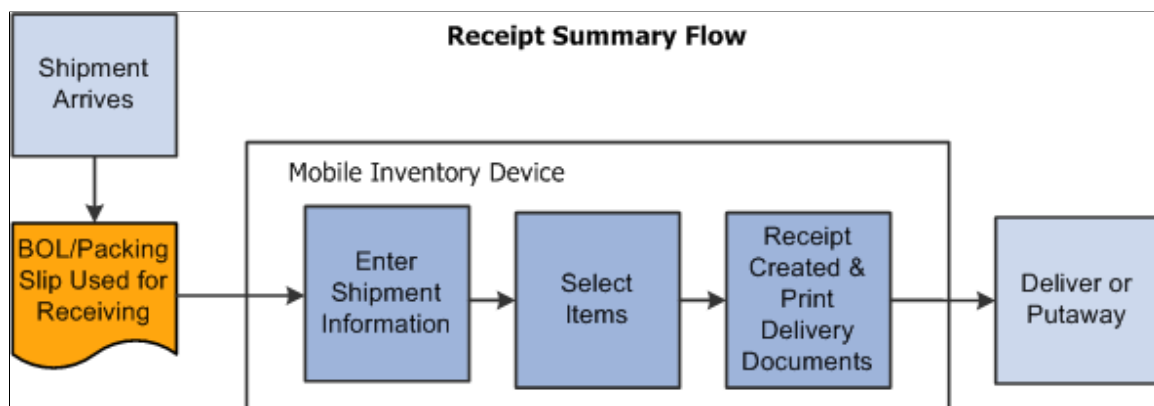
When stock arrives at the receiving location, you receive it using a mobile device with the Mobile Receiving task flow. You can receive inventory or non-inventory items, with or without associated purchase orders. Receipts with a purchase order can be for items that will be stocked in inventory, for items that will go directly to par locations, or for items that will go directly to various departments. A receipt without a purchase order (ad hoc receipt) can be interfaced to the same products as a purchase order receipt. Only non-inventory items can be received without a purchase order.

If the source of a receipt is not a current *supplier* the PeopleSoft system, then you can enter it during Mobile Inventory Receiving.

If the *attention to* or *location* information for delivery is not in the PeopleSoft system, then you can enter it during Mobile Inventory Delivery.

### Image: Receipt Summary Flow

This diagram illustrates the flow of information through the Mobile Receiving process beginning with when the shipment arrives at the ship to location:



When a shipment arrives at the receiving location, it typically arrives with a bill of lading or packing slip. These documents can be used to gather information needed to record the receipt. Using a mobile

device at the receiving location, you can enter shipment information. You select items to be received and determine if there are additional items in the shipment that need to be received. After determining all of the items that have been received, you can create and print a receipt. The information is relayed back to the PeopleSoft system where you can perform the downstream receipt processes.

---

**Note:** Entering shipment information is optional.

---

You can also select to print delivery documents. Delivery information becomes available only after the item has been received. When you select to print delivery documents, the system uses the receipt information and initiates the RECV\_DEL multi-process job. The job gathers receiving data for the Receipt Delivery Detail report.

See [Understanding How to Record Deliveries in PeopleSoft Purchasing Using Mobile Inventory Management](#).

### Simple and Advanced Selection of Items for Receipt

The difference between a simple and an advanced search for receipt items is the number of input fields that you can use. After you enter information in the selection fields, the rest of the search is the same. The search produces a list of purchase order lines and you select the lines to include in the receipt.

You use a simple search when the shipment is for one purchase order ID. You enter the purchase order ID and the mobile device displays a list of items for that purchase order that match the default ship to location and the due dates that are in the date range selection. You select the purchase order lines and schedules that are in the shipment and enter or adjust the quantity received.

An advanced search is used if you need to refine the selection criteria beyond just the purchase order and default ship to. Some examples include receiving a past due purchase order in which the due date is prior to the Days +/- field value.

Another example might be when a shipment includes items from multiple purchase orders. In this case you have several options. First, you can create one receipt for each purchase order using a simple search. Second, you can use the advanced selection to create a list of purchase order lines that you can receive in one shipment. To do this, you enter selection criteria to find matches in the shipment's purchase order lines.

A final example might be when a packing slip does not include the purchase order ID. In this case you can search for the purchase order by entering a supplier, manufacturing item ID and so on.

## Purchase Order Receipts

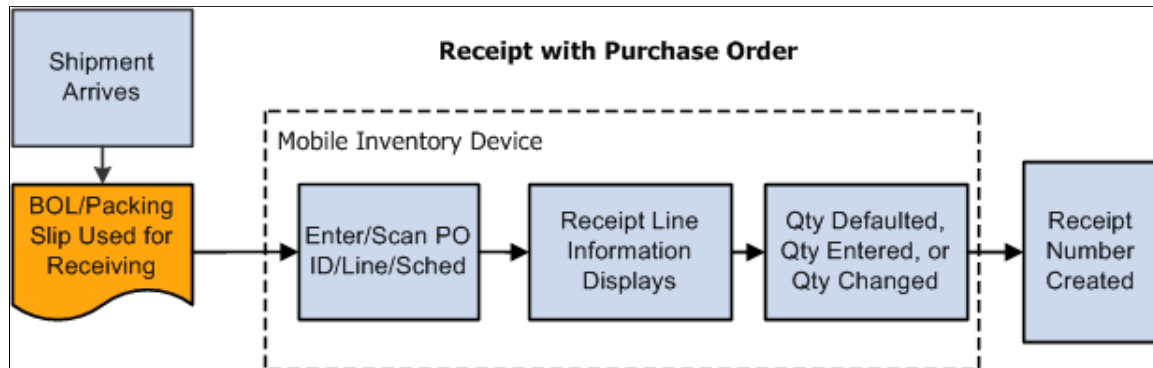
To take advantage of the purchasing authorizations established during the requisition and purchasing process, goods and services that you receive need to be referenced against a purchase order. With Mobile Receiving, the purchase order must exist; however, lines and schedules might not be known by the person recording the receipt.

The system provides default receiving and purchase order business units, derived from User Preferences, but you can override the values. The Mobile Receiving application automatically assigns a number to the receipt, but you can override the number. A component interface built on top of the Add/Update Receiving page processes the transaction from Mobile Receiving. Component interfaces for Mobile Receiving include MIN\_PO\_RECV\_CI and PO\_RECEIPT\_CI.

See [Understanding Mobile Inventory Management Setup in PeopleSoft](#).

### Image: Receipt with purchase order flow

This diagram illustrates the flow for how a purchase order shipment is received and a receipt is created for the transaction. It also highlights the Mobile Receiving part of the flow:



When a purchase order is defined and the shipment arrives at the receiving location, you use a mobile device to enter or scan the purchase order ID, if the purchase order ID is bar coded on the packing slip. Upon reading the purchase order, the mobile device displays the purchase order receipt line information including the supplier item description ID and default quantity, if it exists.

A setup option is available to control which item ID displays on the mobile page. You can select to display the item by:

- Purchase order line item.
- Supplier item.
- Manufacturing item.

If your user preferences are set to provide a default purchase order quantity or quantity remaining for receiving, the mobile device displays the quantity for you. However, if your user preferences are set for blind receiving or not to provide default quantities, then the system does not provide a quantity.

These user preferences are defined on the Receiver Setup page. To access the page, select: Set Up Financials/Supply Chain, Common Definitions, User Preferences Define User Preferences, click the Procurement link, and then the Receiver / RTV Setup link. Select the Blind Receiving Only check box to not display a quantity. Or, select the No Order Qty button to not display the purchase order quantity.

You can view additional details about individual items by clicking the Show link. Select the lines included in this receipt, enter or change the receipt quantity and save. When saving the receipt, you can trigger the RECV\_DEL multi-process job to create the Receipt Delivery Detail report. Repeat the receiving process to receive more purchase order lines. After receiving the items, you can then use the mobile device with Mobile Delivery to complete the delivery verification of the items. When you save the receipt, the system provides the option to close short purchase order lines that are being received.

Other processes that the system can trigger are based on user preferences. For example: interface receipts and streamline subcontract. However, for this release we are not providing the ability to change these triggers and these triggers receive their default values from user preferences.

---

**Note:** You can add receipts for lot-controlled and serial-controlled items, device tracked items, and asset items. You cannot enter values for the receipt until you access the PeopleSoft system's Receiving page to enter the values after you save the mobile receipt.

---

## Ad Hoc Receipts

Ad hoc receipts are receipts without a purchase order and provide you the capability to track a package from receipt to delivery. For example, if a salesperson ships samples to a doctor's office, a purchase order or accounts payable transaction is not generated, but the samples are received and delivered.

Another example might be when a department orders supplies using a credit card. In this case, there is not a purchase order and an invoice is not sent to accounts payable. When these items arrive, the receipt needs to be recorded and the items delivered to the appropriate person or department.

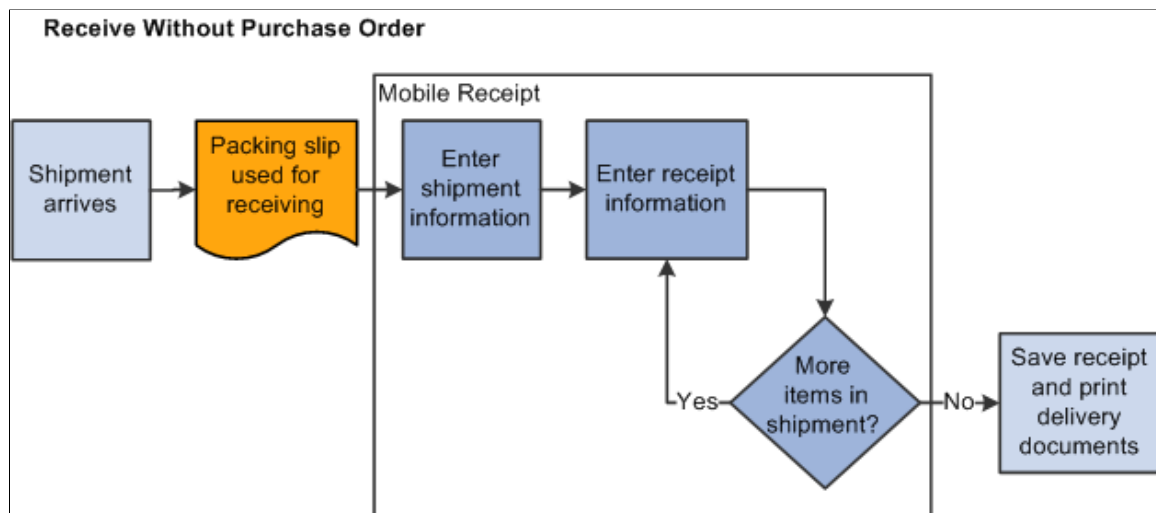
---

**Note:** To use the ad hoc receipt transaction, ensure that the Change Non PO Receipt Price check box is selected on the Receive Setup page for your user preferences. To access the check box, select: Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, click the Procurement link, and then click the Receiver / RTV Setup link.

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### Image: Ad hoc receipt process flow

This diagram illustrates the process flow to receive an item and create an ad hoc receipt. It highlights the part of the flow where you use Mobile Receiving:



Using ad hoc receipts, you can provide basic information about the receipt, add multiple items to the receipt, and save the receipt into the PeopleSoft system where you can review and update the receipt. The receipt is also available to a mobile device so that Mobile Delivery can complete the delivery of the received items.

### Related Links

[Setting Up Component Interfaces for Mobile Inventory Management](#)

## Setting Up the PeopleSoft System for Use with Mobile Receiving

This section discusses how to:

- Establish Mobile Receiving installation options for purchase orders with receipts.
- Establish Mobile Receiving installation options for ad hoc receipts.
- Define user preferences for Mobile Receiving.
- Define Mobile Receiving purchasing options.
- Establish printer defaults for the Mobile Receiving Delivery report.

### Pages Used to Set Up the PeopleSoft System for Mobile Receiving

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---|------------------------|--|--|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, and select either the Receiving PO or Receiving Ad Hoc task flow                  | Establish Mobile Receiving options for purchase orders with receipts.<br><br>Establish Mobile Receiving options for ad hoc receipts. |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences Inventory  | Define user preferences for Mobile Receiving.  |
| Mobile Receiving                        | BU_OPT_MOBILE_REC      | Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition, and click the Mobile Receiving link                    | Establish Mobile Receiving Ad Hoc default values.  |
| Receiver Setup                          | OPR_DEF_RECV_SEC       | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Procurement. Click the Receiver / RTV Setup link. | Establish printer defaults for the Mobile Receiving Delivery report.   |

### Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to establish Mobile Receiving options for purchase orders with receipts.

Establish Mobile Receiving options for ad hoc receipts.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, and select the Receiving PO flow

### Image: Installation Options - Mobile Inventory: Receiving PO task flow page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Receiving PO task flow page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It has two main sections: 'System Options' and 'Task Options'.  
 In 'System Options':  
 - 'Key Concatenation Separator' is an empty text field.  
 - 'Role Name' is a text field containing 'MIN User' with a search icon.  
 - 'Delivery Signature Required' is a checked checkbox.  
 In 'Task Options':  
 - 'Task Flow' is a dropdown menu set to 'Receiving PO'.  
 - 'Rows Displayed' is a text field containing '10'.  
 - 'Initial Display Mode' is a dropdown menu set to 'Single Item'.  
 - 'Display Item' is a dropdown menu set to 'PO Item ID'.  
 Below these are several checkboxes:  
 -  Display Lookups  
 -  Display Description  
 -  Display Filter Related Fields  
 -  Display Show/Hide in tables  
 -  Expand Comments  
 -  Print Delivery Report  
 -  Set Select Checkbox  
 -  Display Storage Location  
 -  Display Warning Messages  
 -  Filter All Alternate Items

You use installation options to define default values for Mobile Receiving pages in the PeopleSoft system and to control the behavior of the transaction.

### Delivery Signature Required

Select to indicate that the mobile application requires a signature of the person receiving a delivery. When this option is selected, the Perform Delivery page requires a signature.

See [Perform Delivery Page](#).

### Rows Displayed

Enter the maximum number of rows that you want to display in the tables for the Mobile Receiving application.

### Display Item

Select the item ID value that you want to display for the receipt line when it is displayed in Mobile Receiving. Values include:

- Mfg Item ID
- PO Item ID
- Supplier Item ID

The display value that you select will be the item ID displayed in the Mobile Receiving page. You can view the other item ID values by opening the Show table.

|   |   |
|---|---|
| <b>Display Lookups</b>  | Select this check box to display the Lookup icons for fields in this transaction. The Lookup icon enables you to view a list of values and select one.  |
| <b>Display Description</b>  | Select to display the item descriptions. If this option is selected, the description always displays for description only lines.  |
| <b>Display Filter Related Fields</b>  | Select to display the Filter field and Filter button on the page. Deselect the check box to remove the filter functionality from the page.  |
| <b>Display Show/Hide in Tables</b>  | Select to display the Show and Hide icons in tables.  |
| <hr/>   |   |
| <b>Note:</b> When you use the PeopleSoft system, values in a grid are equivalent to values in an Application Development Framework (ADF) table. |   |
| <hr/>   |   |
| <b>Expand Comments</b>  | Select to indicate that if comments are entered for a purchase order at the header level, at the line lever, or for the ship to location, then the comments section of the Mobile Inventory - Receiving pages is expanded in the comments section.                  |
| <b>Print Delivery Report</b>  | Select to run a Delivery report when you create the receipt. The system initiates the RECV_DEL multi-process job in the same business event in the PeopleSoft system.   |
| <b>Set Select Checkbox</b>  | Select to set the default value for the Sel check box to selected when you access the Receiving - Receive Lines page.   |
| <b>Filter All Alternate Items</b>   | Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID ( MASTER_ITEM_TBL) that matches the alternate is shown in the table. |
|   | Deselect to indicate that only the item ID is to be used for filtering, which also improves system performance.   |

See [Installation Options - Mobile Inventory Page](#).

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to establish Mobile Receiving options for ad hoc receipts

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, and select Receiving Ad Hoc task flow

### Image: Installation Options - Mobile Inventory: Receiving Ad Hoc task flow page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Receiving Ad Hoc task flow page.

You use the installation options to define default values for Mobile Receiving pages in the PeopleSoft system and to define page values available on a mobile device.

Each field on this page is also on the Installation Options - Mobile Inventory: Receiving PO task flow page.

## Related Links

[Installation Options - Mobile Inventory Page](#)

[Receiving Purchase Order Receipt Items Using a Mobile Device](#)

## User Preferences - Mobile Inventory Page

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to define user preferences for Mobile Receiving.

## Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences Inventory

---

**Note:** Select the Receiving Ad Hoc task flow to define ad hoc receiving user preferences.

---

The User Preferences - Mobile Inventory: Receiving PO task flow and Receiving Ad Hoc task flow pages use the same values as the corresponding Installation - Mobile Inventory pages. When you are setting up user preferences, you can select the Use Installation Values check box to use installation values instead of defining user preferences. When you select the check box, user preferences values are no longer available.

## Related Links

[Receiving Purchase Order Receipt Items Using a Mobile Device](#)

## Receiving Items by Ad Hoc Receipt Using a Mobile Device

### Mobile Receiving Page

Use the Mobile Receiving page (BU\_OPT\_MOBILE\_REC) to establish Mobile Receiving Ad Hoc default values.

#### Navigation

Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition, and click the Mobile Receiving link

#### Image: Mobile Receiving page

This example illustrates the fields and controls on the Mobile Receiving page. You can find definitions for the fields and controls later on this page.

The screenshot shows a window titled "Mobile Receiving" with a sub-section "Mobile Options". Inside this section, there are four fields, each with a magnifying glass icon to its right, indicating they are searchable:

- Supplier ID:** Contains the value "SCM0000001". To its right, the text "BIKE-001" is visible.
- Category:** Contains the value "MISC".
- Unit of Measure:** Contains the value "EA".
- Alternate Item Group:** Is currently empty.

At the bottom of the window, there are two buttons: "OK" and "Cancel".

You use this page to define default values that will be used by the Receiving Ad Hoc component.

- |                             |   |
|-----------------------------|---|
| <b>Supplier ID</b>          | Select a supplier ID that will be used as the default value when creating an ad hoc receipt.  |
| <b>Category ID</b>          | Select an item category that will be used as the default value when creating an ad hoc receipt and the item ID is blank.  |
| <b>Unit of Measure</b>      | Select a unit of measure that will be used as the default value when creating an ad hoc receipt and the item ID is blank. The system uses the UNITS_TBL record to validate the unit of measure. |
| <b>Alternate Item Group</b> | Select an option that determines the alternate item group to which the system should use if you are using the Alternate Item feature.   |
- For additional information about alternate items:
- See [Setting Up Alternative Item Identifiers](#).

## Receiver Setup Page

Use the Receiver Setup page (OPR\_DEF\_RECV\_SEC) to establish printer defaults for the Mobile Receiving Delivery report.

### Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Procurement. Click the Receiver / RTV Setup link.

### Image: Receiver Setup page

This example illustrates the fields and controls on the Receiver Setup page. You can find definitions for the fields and controls later on this page.

### Receiver Setup

User: VP1 James Bond

Unit

Change Non PO Receipt Price  
 Interface Receipt  
 Run Close Short  
 Subcontract Streamline  
 Blind Receiving Only   
  No Order Qty   
  Ordered Qty   
  PO Remaining Qty

Receiving Business Unit:   PLEASANTON HEALTH

Days +/- Today:

RTV Dispatch Option:

RTV Inventory Ship Option:

RTV Inventory Destroy Option:

Mobile Receiving Printer

Server Name:

Output Destination Type:

Output Destination Format:

Output Destination:

Use this page to set up printer default values in the Mobile Receiving Printer section of the page. These values are used by the Receiving PO and Receiving Ad Hoc components when printing the Mobile Receipt Delivery report.

|                                  |   |
|----------------------------------|---|
| <b>Server Name</b>               | Select a Process Scheduler Server Name that will be used for running the print delivery report. |
| <b>Output Destination Type</b>   | Select an output destination type as printer to direct the delivery report to the printer.      |
| <b>Output Destination Format</b> | Select a output destination format for printing the delivery report.                            |
| <b>Output Destination</b>        | Select the Printer to print the receipt delivery report .                                       |

See "User Preferences – Receiving and RTV Page (*PeopleSoft FSCM 9.2: Application Fundamentals*)".

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## Receiving Purchase Order Receipt Items Using a Mobile Device

This section discusses how to:

- Search for purchase order items to receive.
- Select purchase order items to include in the receipt and input the quantity received.
- Enter purchase order receipt line information.
- Enter multiple pro numbers for a purchase order receipt line.
- Update purchase order receipt header information.
- Confirm the creation of a purchase order receipt.

### Pages Used to Receive Purchase Order Receipt Items Using a Mobile Device

| <b>Page Name</b>                   | <b>Navigation</b>  | <b>Usage</b>   |
|------------------------------------|--|--|
| Receiving PO Selection             | Mobile Inventory, Receiving PO   | Search for purchase order items to receive.                                    |
| Receiving PO - Receive lines       | Mobile Inventory, Receiving PO. Click the Lookup icon on the Receiving page                          | Select purchase order schedules to receive and define the quantity to receive. |
| Receiving PO - Line Details        | Mobile Inventory, Receiving PO. Click the expand icon next to an item.                               | Enter purchase order receipt line information.                                 |
| Receiving PO - Multiple Pro Number | Mobile Inventory, Receiving PO. Click the expand icon next to an item, then click the Multiple link. | Enter multiple pro numbers for a purchase order receipt line.                  |
| Receiving PO - Header Details      | Mobile Inventory, Receiving PO. Click the Header link on the Select Items page.                      | Update purchase order receipt header information                               |

| <b>Page Name</b> | <b>Navigation</b>                                  | <b>Usage</b>                       |
|------------------|--|------------------------------------|
| Receipt Created  | Click the Add Item button on the Receive Item page | Confirm the creation of a receipt. |

## Receiving Page

Use the Receiving page to search for purchase order items to receive.

### Navigation

Mobile Inventory, Receiving PO

### Image: Receiving PO page

This example illustrates the fields and controls on the Receiving PO page. You can find definitions for the fields and controls later on this page.

When you access the Receiving PO page, the system provides default values from the PeopleSoft system Purchasing set up pages, including user preferences setup. To view all of the default settings, click the Advanced Search and the Options links.

You can change the values which will become the default values on the mobile device until you exit the transaction. The changes that you make are only recognized by the receiving transaction and not recognized by other mobile transactions. The changes do not update the user preferences settings in the PeopleSoft system.

#### Unit

Displays the receiving business unit from the user's default business unit. You can change the business unit. The field is required.

#### Receiver

Enter the receipt number that you want to use to create the receipt. The system assigns the number when you save the receipt. The default value for the field is *Next*. You do not have to enter a number if you use the default value. The assigned number is based on the autonumbering sequence defined in the PeopleSoft system for receipts. This field is required.

#### PO Unit (purchase order unit)

Enter a purchase order business unit. The system defaults the value from user preferences. You can also use the Receipts page in the PeopleSoft system to record the receipt.

**Order ID**

Enter the purchase order number or purchasing contract number. Entering a contract ID retrieves all of the purchase order schedules associated with the contract.

If you enter a value in this field and tab out of the field, the system immediately initiates the search to find the purchase orders that matched the value. If there is at least one row that matches the search, the system displays the Receive Lines page.

**Search**

Click to initiate the search for an order ID. The search feature is also initiated when you tab out of the Order ID field. The system searches for a purchase order ID or purchase order IDs that have the entered contract ID on the purchase order schedule. The returned search displays the purchase order schedules that can be received. You can receive one or all of the schedules.

The search results include the values that match the selection criteria of the advanced search. The values included in the Advanced Search table are included when the search is initiated.

**Advanced Search**

Click to expand the Advanced Search table where you can define additional purchase order search criteria.

**Options**

Click to expand the Options table where you can change processing options for purchase order item receipts for the session.

**Advanced Search**

Use the Receiving PO: Advanced Search table

## Navigation

Click the Advanced Search link on the Receiving PO page

### Image: Receiving PO: Advanced Search table

This example illustrates the fields and controls on the Receiving PO: Advanced Search table. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mobile Inventory Receiving PO' interface. At the top, there is a 'Sign Out' link. Below the title, there are search criteria fields: 'Unit' (US001), 'Receiver' (NEXT), 'PO Unit' (US001), and 'Order ID' (with a 'Search' button). A section titled 'Advanced Search' is expanded, showing additional search criteria: 'Ship To' (US001), 'Item', 'Vendor', 'Vendor Item ID', 'Mfg ID', 'Mfg Item', 'Days +/-' (30), 'Start Date' (08/28/2011), and 'End Date' (10/27/2011). At the bottom of the 'Advanced Search' section, there are 'Search' and 'Reset to Dflts' buttons.

When you click the Advanced Search link or the Expand button, you can view and update additional search criteria for purchase orders. Values in these fields are used to qualify the list of purchase orders.

### Ship To

Enter the ship to location for the purchase order schedules. This field defaults from the User Preferences - Procurement setting for the Ship To Location field. You can override the value. The business unit and ship to unit do not need to have the same value.

### Item

Enter an item ID to which you want to limit the purchase order search.

After entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.

See [Setting Up Alternative Item Identifiers](#).

### Supplier

Enter a supplier short name to which you want to limit the purchase order search. When you perform the search, the system

retrieves only those purchase orders for the supplier short name that you enter.

**Supplier Item ID**

Enter a supplier item ID to which you want to limit the purchase order search. When you perform the search, the system retrieves only those purchase orders for the supplier item that you enter.

When entering a value in the Supplier Item ID field, a supplier is required in the Supplier field.

**Mfg ID (manufacturer ID)**

Enter a manufacturer's ID to limit the purchase order search results to only those purchase orders with that manufacturer's ID.

**Mfg Item ID (manufacturer item ID)**

Enter the manufacturer's item ID to limit the search to just that item ID for the manufacturer.

**Days +/-**

Enter the number of days plus or minus from the current date.

The system searches for purchase orders that have a due date within this range of days. This value defaults from the Receiver Setup page in the User Preference - Receiver Setup component.

You might need to change this value if an older purchase order is being received and the initial default value is too small so that the purchase order lines to be received do not appear.

By increasing the number of days, you can find the lines and receive them.

You enter a value to further restrict or expand the number of purchase order schedules that appear within the start date and end date range. This value is added or subtracted from the current date to calculate the start date and end date values.

The default value appears from the User Preferences - Procurement: Receiver Setup page. You can also enter the start date and end date. The system selects all schedules with due dates that are on or within the two dates you enter.

**Start Date and End Date**

Enter the start and end days that are used as a comparison against the purchase order due date to determine which schedules to retrieve. If you change the start or end date values, the system does not change the Days +/- field value.

**Reset to Dflt (reset to defaults)**

Click to reset the Ship To and Days +/- field search values in the Advanced Search table to the default values.

The system also clears other input fields such as Item, Supplier, Supplier Item ID, Mfg ID and Mfg Item because these fields do not have default values.

**Options**

Use the Receiving PO: Options table

## Navigation

Click the Options link on the Receiving PO page.

### Image: Receiving PO: Options table

This example illustrates the fields and controls on the Receiving PO: Options table. You can find definitions for the fields and controls later on this page.

| Mobile Inventory  |   | Sign Out                              |
|---|---|---------------------------------------|
| <b>Receiving PO</b>   |   |                                       |
| Unit  | <input type="text" value="US001"/>        |                                       |
| Receiver  | <input type="text" value="NEXT"/>         |                                       |
| PO Unit   | <input type="text" value="US001"/>        |                                       |
| Order ID  | <input type="text"/>                      | <input type="button" value="Search"/> |
| <a href="#">Advanced Search</a> - <a href="#">Options</a>   |   |                                       |
| <b>Options</b>  |   |                                       |
| Rows To Display   | <input type="text" value="10"/>           |                                       |
| Display Item  | <input type="text" value="PO Item ID"/>   |                                       |
| Initial Display   | <input type="text" value="Single Item"/>  |                                       |
| <input checked="" type="checkbox"/> Display Lookups<br><input checked="" type="checkbox"/> Display Description<br><input checked="" type="checkbox"/> Display Filter<br><input checked="" type="checkbox"/> Display Show/Hide in tables<br><input checked="" type="checkbox"/> Set Select Checkbox<br><input type="checkbox"/> Run Close Short<br><input type="checkbox"/> Expand Comments<br><input checked="" type="checkbox"/> Print Delivery Report<br><input checked="" type="checkbox"/> Display Storage Location<br><input checked="" type="checkbox"/> Display Warning Message<br><input type="checkbox"/> Filter All Alternate Items |   |                                       |
| Print Server  | <input type="text" value="PSNT"/>         |                                       |
| Output Type   | <input type="text" value="Printer"/>      |                                       |
| Output Format   | <input type="text" value="XMLP"/>         |                                       |
| Output Destination  | <input type="text" value="PLS2-5035MFD"/> |                                       |

Use this page to change processing and display options for receiving purchase order items. Most of the settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

|                                    |  |
|------------------------------------|--|
| <b>Rows to Display</b>             | Enter the number of rows to display.   |
| <b>Display Item</b>                | Select how you want to display items in Receiving: Receive Lines page. You can display items by: <p><i>PO Item ID</i>: Select to display the list based on the PeopleSoft system ID for the purchase order item.</p> <p><i>Mfg Item</i> (manufacturer item): Select to display the list based on the manufacturer's item ID.</p> <p><i>Supplier Item</i>: Select to display the list based on the supplier's item ID.</p>  |
| <b>Display Lookups</b>             | Select to display the Look Up icons.   |
| <b>Display Description</b>         | Select to display the item descriptions. The description always displays for description only lines.   |
| <b>Display Filter</b>              | Select to enable filtering on the Receiving: Select Items page. When selected, the Filter By field appears where you can limit the list of items based on character strings.   |
| <b>Display Show/Hide in tables</b> | Select to display the Hide and Show links on the Receiving: Select Items page. You can expand and collapse additional item information tables using the links. <hr/> <p><b>Note:</b> Depending on the mobile device and its view settings, the Show and Hide links might appear as Expand and Collapse icons. The Expand icon (right arrow) shows the additional information, while the Collapse icon (down arrow) hides the additional information.</p> <hr/>   |
| <b>Set Select Checkbox</b>         | Select to set the default value for the Sel check box to selected when you access the Receiving PO: Receive Lines page.  |
| <b>Run Close Short</b>             | Select to indicate that you want to include this receipt when the Close Short process is run. When you save the receipt and the Receipt Push process runs, the process calls the Close Short process to create the close short transactions for the purchase orders. <p>This process is completed when you initiate the Close Short process.</p> <p>This valued comes from the Receiver Setup page (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Procurement, Receiver/RTV Setup).</p> |
| <b>Expand Comments</b>             | Select to indicate that you always want the purchase order header and line comments section expanded when comments exist for the item.   |

**Print Delivery Report**

Click to run a Delivery report when you create the receipt. The system initiates the RECV\_DEL multi-process job in the same business event in the PeopleSoft system.

**Filter All Alternate Items**

Displays the option selected on the Installation Options – Mobile Inventory page or the User Preferences – Mobile Inventory page.

If this option is selected, then the system searches through all possible alternate item identifiers when filtering a table. If an alternate item identifier is entered in the Filter field, then the item ID that matches the alternate is displayed in the table.

If this option is not selected, then alternate item identifiers cannot be used to filter the table.

**Print Server**

Enter the server to which you want to send the Delivery report.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

**Output Type**

Select the type of output for the Delivery report. Currently the only option is *Printer*.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

**Output Format**

Select a format for the Delivery report. Options include *HP format (\*.lis)*, and *Line Printer Format (\*.lis)*.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

**Output Destination**

Enter the system name of the printer to which you want to print the Delivery report.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

## Receiving PO - Receive Lines Page

Use the Receiving PO - Receive Lines page to receive and define the quantity to receive.

## Navigation

Mobile Inventory, Receiving PO. Click the Lookup icon on the Receiving page

### Image: Receiving PO - Receive Lines page

This example illustrates the fields and controls on the Receiving PO - Receive Lines page. You can find definitions for the fields and controls later on this page.

| Sel                                 | PO Item ID                                | * Qty     | Dist |
|-------------------------------------|---|-----------|------|
| <input checked="" type="checkbox"/> | 10000<br>Long Sleeve Biking Jersey, Men's | 100<br>EA |      |

The Receive Lines page provides a list of the purchase order items that met the purchase order search and Advanced Search that you entered. Using the page you can select all or individual items to receive.

**Note:** You can select multiple purchase order lines to add to the receipt as long as the supplier is the same for each purchase order. You cannot select multiple purchase order lines if the suppliers are different.

The business unit and the receipt number appear at the top of the page. If you did not assign a receipt number, *Next* appears in the header, and the system assigns the next receipt number when you save the receipt.

The system retrieves purchase orders lines that have open purchase order schedules. The search results are sorted in descending order by:

- Purchase order business unit.
- Purchase order ID.
- Purchase order line.
- Purchase order line schedule.

### Filter (field)

Enter a value on which to search the list of purchase order items.

You can reduce the list by entering a string of characters on which to search. For example, if you want to reduce the list by an item name, such as mask, enter the value and the system limits the list to just those items with mask in their description.

The system searches these fields:

- PO Item ID
- Supplier Item ID
- Mfg ID
- Mfg Item ID

- Item Description
- PO ID
- Supplier Name
- Item Category
- Pro Number
- Packing Slip
- Invoice

**Filter (button)**

Click to filter the list of items based on the value that you enter in the Filter By field. The filter feature is also initiated when you tab out of the Filter field.

**Clear**

Click to clear the filter results. After clearing the results, you can enter a new filter value.

**Pro Number (progressive number) progressive number**

Enter the tracking number assigned to the shipment in which the material arrived.

---

**Note:** If you enter a Pro number in the Header page, that value displays on this page.

---

**Apply**

Click to apply the value in the Pro Number field to all of the receipt lines with a blank pro number. The apply action is also initiated when you tab out of the Pro Number field. The system does not replace the Pro number on receipt lines that already have a Pro number assigned to them.

**Header**

Click to view and maintain header information for the purchase order receipt.

See [Header Details Page](#).

**Expand Mobile Receiving expand table**

Click to show additional information about the receipt line.

These options are available if you selected the Display Show/Hide in tables check box in the Options table.

When you click to show additional line information, the item information appears depending on the value that you selected in the Display Item field for the Options table. For example, if the supplier item is displayed in the main table, then the purchase order item and the manufacturing item display in the table.

Also, if any representations of the item ID are blank, the system does not display the field. For example if the manufacturing item ID is blank, the system does not display the Mfg Item ID field in the expanded table.

Here is a list of item IDs that might display in the Show table:

- *Vndr Item* (supplier item): Displays the item ID that the supplier uses to track the item. The field appears empty if a supplier item doesn't exist. If you selected to display the search results by supplier ID, this information appears at the item level.
- *PO Item ID*: Displays the purchase order line's item ID. If you selected to display the search results by PO item ID, this information appears at the item level.
- *Mfg Item* (manufacturer item): Displays the manufacturer item ID if one exists. If you selected to display the search results by manufacturer ID, this information appears at the item level.

Other fields that are displayed in the Show table include:

- *PO ID* (purchase order ID): Displays the purchase order, line number, and schedule using the defined separator (\) for Mobile Inventory Management.
- *Due Dt* (due date): Displays the requested due date.
- *Pro Number*: Enter the tracking number assigned to the shipment in which the material arrived. This progressive number appears by default from the receipt header if a Pro number value exists for the header.

If there are multiple pro numbers entered for the receipt line, then this field is display only.

- *Multiple* Click this link to access the Multiple Pro Number page, where you can record multiple pro numbers for a receipt line.
- *Packing Slip*: Enter the packing slip ID for the received merchandise. The packing slip appears by default from the receipt header.
- *Invoice*: Enter the invoice ID assigned by the supplier. The invoice ID from the receipt header appears by default to the receipt lines

Click to hide additional information.



**Collapse**

**Sel**

Click to select or deselect an individual item to add to the receipt. The initial default value of the check box depends on the Set Select Checkbox setting in the Options table.

If the Set Select Checkbox check box is selected, the default value for the check box is selected. If the Set Select Checkbox check box is not selected, the default value for the Sel check box is deselected.

If the Sel check box in the table is deselected and you enter or change the quantity, the system will select the Sel check box. You will not immediately see the change. When you refresh the page, the system selects the check box.

Refreshes for the page happen when you:

- Click a button such as the Filter, Clear, View All or View Sel buttons.
- Click an icon such as Deselect All, Show, or Hide.

The system deselects the Sel check box if you clear or change the item quantity to 0.

---

**Note:** If you do not want to receive a specific line, you should manually deselect the Sel check box.

---

**PO Item ID, Mfg Item (manufacturing item), and Vndr Item (supplier item)**

Displays the items that met the search criteria you entered. The column value depends on the value that you selected in the Display Item field in the Options table.

The description is displayed below this field if you selected the Display Description check box on the Options table.

Purchase order header, line, and ship to comments are displayed if the Expand Comments check box is selected on the Options table. If the Expand Comments check box is not selected on the Options table, then the Comments link is displayed in the collapsed state. The Comments link is not displayed if comments do not exist for the receipt line.

**Qty (quantity)**

Enter the quantity delivered. A default value is based on user preferences values for blind receiving and receipt quantity options. The unit of measure appears with the quantity.

**UOM (unit of measure)**

Displays the purchase order line's unit of measure.

**Save**

Click to receive the items that you selected on this page. When you save the selections, the system performs similar logic as it does for the PeopleSoft system's online Receiving page to process the receipt. If the save is successful, the system displays the receipt number that it generated.

See "Understanding the Receiving Business Process (*PeopleSoft FSCM 9.2: Purchasing*)".

---

**Note:** If an error prevents the receipt from saving, the system provides an error message with information about the error.

When an error occurs, the Receive Lines page displays only the lines that are being received. Lines with the Sel check box deselected will not be displayed.

You can use the View All button to see all lines for the original selection.

---

See [Receipt created Page](#).



**Select All** Select All button

Click to select all of the items in the list. The system places a check mark in the Sel check box for each item. The system adds these items to the receipt when you click the Save button.



**Deselect All** Deselect All button

Click to deselect all of the items in the list. The system removes the check mark from the Sel check box.

**Return to Add**

Click to access the Receiving PO page. When you click the link, you are indicating that you want to cancel the current receipt and start over with a new receipt. The system provides a warning message for you to save any changes that you made to the receipt. Click the Continue button to proceed to the Receiving PO page without saving changes. Click the Return button to return to the Receiving PO selection page.

**View Sel (view selected) View All** View Sel button View All button

Click the View Sel button to display the receipt rows that have been selected to be received.

Click the View All button to view all rows from the original purchase order line selections.

When you click either button, the system toggles to the other button. For example, when you initially access the Receiving PO selection page, the system displays all purchase order rows and makes the View Sel button available. Then, after selecting or deselecting rows to include on the receipt, you can click the View Sel button to display just the rows that you've selected.

When you access the list, the system displays the View All button that you can click to return to the original list.

This feature is useful when the purchase order receiving quantity option is set to blind receiving or there is not a default quantity. In this case, as you enter receipt quantities, the system selects the Sel check box for you, and because that selection isn't immediate, you can use the View Sel button to view the selected rows immediately.

## Receiving PO: Line Details Page


Use the Receiving PO: Line Details page to enter purchase order receipt line information

## Navigation

Mobile Inventory, Receiving PO. Click the expand icon next to an item.

### Image: Receiving PO - Line Details

This example illustrates the fields and controls on the Receiving PO - Line Details. You can find definitions for the fields and controls later on this page.

| Sel   |  | PO Item ID                                | * Qty     | Dist  |
|---|--|---|-----------|---|
| <input checked="" type="checkbox"/>   |  | 10000<br>Long Sleeve Biking Jersey, Men's | 100<br>EA |  |
| <b>PO ID</b> POSBI-05\111<br><b>Vendor</b> PLANTINSUL-001<br><b>Due Dt</b> 03/16/2001<br><b>Category</b> CYCLING<br><b>Pro Number</b> <input type="text"/><br><b>Pro Number</b> <a href="#">Multiple</a><br><b>Packing Slip</b> <input type="text"/><br><b>Invoice</b> <input type="text"/> |  |   |           |   |

Use this page to enter line details for the purchase order receiving line.

### Multiple

Click to enter multiple tracking numbers for a receipt line.

## Receiving PO - Multiple Pro Number Page

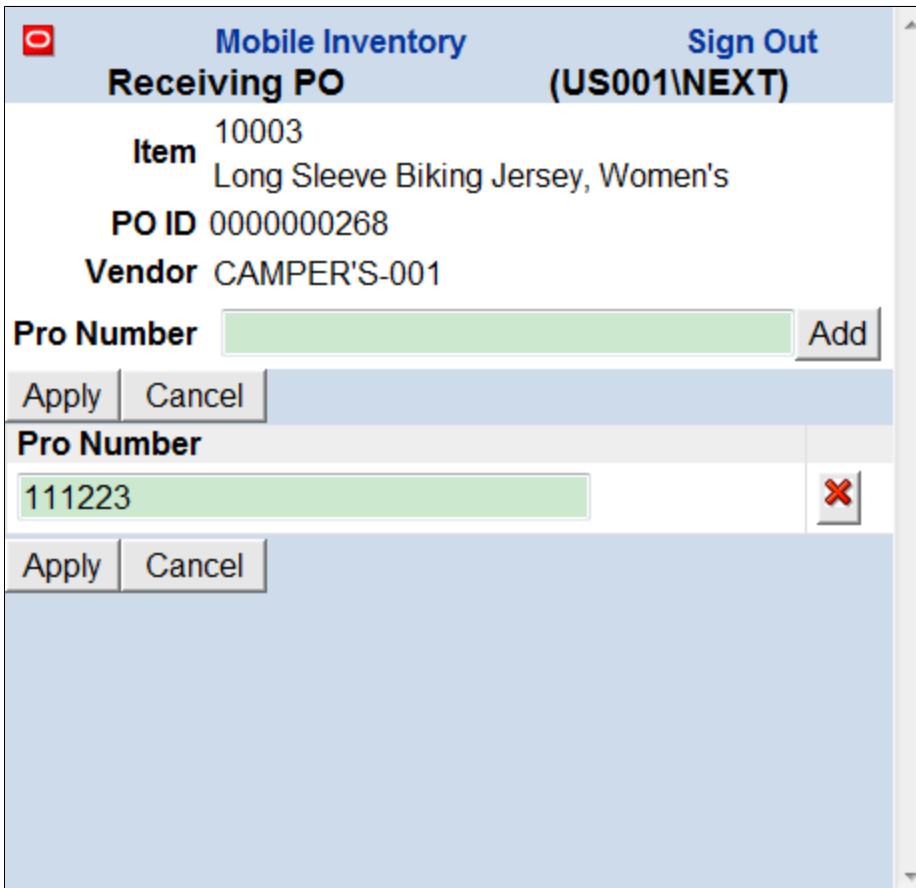
Use the Receiving PO - Multiple Pro Number page to enter multiple pro numbers for a purchase order receipt line.

### Navigation

Mobile Inventory, Receiving PO. Click the expand icon next to an item, then click the Multiple link.

### Image: Receiving PO - Multiple Pro Number page

This example illustrates the fields and controls on the Receiving PO - Multiple Pro Number page.



Use this page to enter multiple pro numbers for a purchase order receipt line.

To enter multiple pro numbers for a purchase order receipt line:

1. Enter a pro number in the Pro Number field.
2. Click the Add button.

The system displays the pro number as an open field. A delete icon is available to the right of the pro number.

3. Click the Apply button to apply the pro numbers to the receipt line.

### Header Details Page

Use the Header Details page to update purchase order receipt header information.

## Navigation

Mobile Inventory, Receiving PO. Click the Header link on the Select Items page.

### Image: Receiving PO - Header Details page

This example illustrates the fields and controls on the Receiving PO - Header Details page. You can find definitions for the fields and controls later on this page.

Use this page to view or define shipping information for the purchase order receipt.

|  |  |
|--|--|
| <b>Carrier</b>                         | Select the freight carrier that delivered the shipment. To locate a carrier, click the Look Up icon.   |
| <b>Pro Number (progressive number)</b> | Enter the tracking number assigned to the shipment in which the material arrived. When you add the number and click the OK button, the system updates the Pro Number field on the Receiving - Select Items page and also updates the Pro number for all receipt lines with a blank Pro number. |
| <b>Packing Slip</b>                    | Enter the packing slip. This value is typically listed on the packing slip provided by the supplier.   |
| <b>Invoice</b>                         | Enter the invoice ID. If this receipt is processed through a supplier's Evaluated Receipts Settlement process, this field value may be the same as the Packing Slip field value.   |
| <b>OK</b>                              | The system applies the Pro number, packing slip, and invoice values to all receipt lines that have a blank value.  |
| <b>Cancel</b>                          | Click to cancel any changes that you made to this page and return to the Receiving - Select Items page.  |

## Receipt created Page

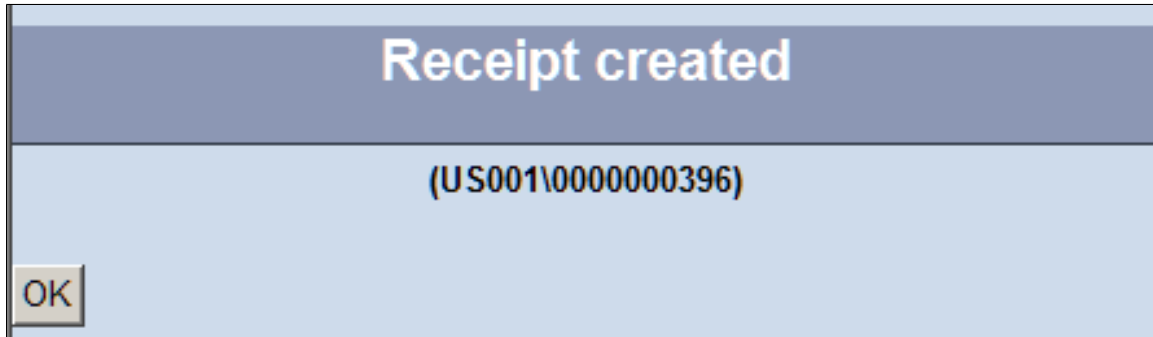
Use the Receipt created page to confirm the creation of a receipt.

## Navigation

Click the Add Item button on the Receive Item page

### Image: Receipt created page

This example illustrates the fields and controls on the Receipt created page.



The system displays this page after you successfully create a purchase order receipt. The information includes the business unit in which the receipt was created and the receipt number. You can now access the receipt information using the PeopleSoft system. Receipts created using Mobile Receiving and Receiving Ad Hoc will have a Receive Source field value of *Mobile* on the Receiving - Header Details page in the PeopleSoft system. Click the OK button to access the Receiving page. The system clears the previous receipt information and enables you to create another receipt.

---

**Note:** If an error prevents the receipt from saving, the system provides an error message with information about the error. When an error is encountered the system displays the error and the Receive Lines page will display only the lines that are being received. All the lines with the Sel check box deselected will not be display.

Also, the system suppresses some warning messages, such as early receipts. Warning messages that are suppressed by the system are not displayed and are not errors, and do not prevent the creation of the receipt.

---

If user preferences have been define for additional processing of the receipt, the system triggers the additional processes. These include:

- Process receipts will be triggered if user preferences value Interface receipts is selected.
- If the Run Close Short check box is selected the Close Short process will run when the Process Receipts process is run.
- If a receipt line is an inventory item then items will be putaway based on the inventory putaway rules defined.
- Streamline subcontract will be triggered if the user preferences value is selected.

To enter serial, lot, device tracking, or asset information, you must use the online PeopleSoft system Receiving page. You can also maintain receipt rejection information in the PeopleSoft system Receipt Lines page - More Details tab.

## Receiving Items by Ad Hoc Receipt Using a Mobile Device

This section discusses how to:

- Define information for ad hoc receipts.
- Select items to receive using ad hoc receipts.
- Update ad hoc receipt header information.
- Confirm ad hoc receipt creation.

### Pages Used to Receive Items by Ad Hoc Receipt on a Mobile Device

| <i>Page Name</i>                  | <i>Navigation</i>  | <i>Usage</i>                                   |
|-----------------------------------|--|--|
| Receiving Ad Hoc                  | Mobile Inventory, Receiving Ad Hoc   | Define information for ad hoc receipts.        |
| Receiving Ad Hoc - Receive Items  | Mobile Inventory, Receiving Ad Hoc, and click the Add button                         | Select items to receive using ad hoc receipts. |
| Receiving Ad Hoc - Header Details | Mobile Inventory, Receiving Ad Hoc, click the Add button, and click the Header link. | Update ad hoc receipt header information.      |
| Receipt Created                   | Click the Save button on the Receiving Ad Hoc page.                                  | Confirm receipt creation.                      |

### Receiving Ad Hoc Page

Use the Receiving Ad Hoc page to define information for ad hoc receipts

## Navigation

Mobile Inventory, Receiving Ad Hoc

### Image: Receiving Ad Hoc page

This example illustrates the fields and controls on the Receiving Ad Hoc page. You can find definitions for the fields and controls later on this page.

Use this page to define basic information about an ad hoc receipt and to establish processing options for ad hoc receiving.

---

**Note:** To use this transaction, ensure that the Change Non PO Receipt Price check box is selected on the Receive Setup page for your user preferences. To access the check box, select: Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, click the Procurement link, and then click the Receiver / RTV Setup link.

---

**Note:** The Receipt Accrual process does not include ad hoc receipts in its processing because the Receipt Accrual skips these receipts.

---

|                       |  |
|-----------------------|--|
| <b>Unit</b>           | Displays the user's default business unit. You can change the business unit. A business unit is required.  |
| <b>Receiver</b>       | Enter the receipt number that you want to use to create the ad hoc receipt. The system assigns the number when you save the receipt. The default value for the field is Next. You do not have to enter a number if you use the default value. The number is based on the autonumbering sequence defined in the PeopleSoft system for receipts. This field is required. |
| <b>Supplier</b>       | Enter the supplier short name from whom the shipment was received. The default value for the field is based on the business unit's default supplier for Mobile Receiving Ad Hoc. The field is required.  |
| <b>Receipt Source</b> | Enter the source of the receipt if the source is not a valid supplier ID in your PeopleSoft system.  |
| <b>Carrier</b>        | Enter the freight carrier that delivered the shipment.   |

**Ship To**

Enter the ship to location. The default value from user preferences initially appears in the field. You can override the value. The field is required.

**Add**

Click the Add button to add items to receive using this ad hoc receipt. The Add feature is also initiated when you tab out of the Ship To field. For more information about the Add feature, see "Selecting Items to Receive Using Ad Hoc Receipts."

See [Receiving Ad Hoc - Receive Item Page](#).

**Options**

Use the Options table

### Navigation

Click the Options link on the Receiving Ad Hoc page

### Image: Receiving Ad Hoc - Options page

This example illustrates the fields and controls on the Receiving Ad Hoc - Options page. You can find definitions for the fields and controls later on this page.

Use this page to change processing and display options for ad hoc receiving items. Most of the settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

- Rows to Display** Enter the number of rows to display on the Receiving Ad Hoc - Receive Item page.
- Display Lookups** Select to display the Lookup icons used for ad hoc receiving searches.
- Display Description** Select to display the item descriptions. The description will always display for description only lines.

**Display Show/Hide in tables**

Select to display the Hide and Show links on the Receiving Ad Hoc - Receive Item page. You can expand and collapse additional item information tables using the links.

**Print Delivery Report**

Select to run a Delivery report when you create the receipt. The system initiates the RECV\_DEL multi-process job in the same business event in the PeopleSoft system.

**Print Server**

Enter the server to which you want to send the Delivery report.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

**Output Type**

Select the type of output for the Delivery report. Currently the only option is *Printer*.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

**Output Format**

Select a format for the Delivery report. Options include *HP format (\*.lis)*, and *Line Printer Format (\*.lis)*.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

**Output Destination**

Enter the system name of the printer to which you want to print the Delivery report.

This setting defaults from the Receiver Setup page. (Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Procurement link, and then click the Receiver/RTV Setup link.

## Receiving Ad Hoc - Receive Item Page

Use the Receiving Ad Hoc - Receive Item page to select items to receive using ad hoc receipts.

## Navigation

Mobile Inventory, Receiving Ad Hoc, and click the Add button

### Image: Receiving Ad Hoc - Receive Item page

This example illustrates the fields and controls on the Receiving Ad Hoc - Receive Item page. You can find definitions for the fields and controls later on this page.

The screenshot shows a mobile application interface for receiving items. The top bar is blue and contains a red square icon, the text 'Mobile Inventory', and a 'Sign Out (US015\NEXT)' link. Below this is a white area with several input fields: 'Pro Number', 'Attn To', 'Location' (containing 'COR-1'), 'Item', 'Descr', and 'Qty'. A magnifying glass icon is next to the 'Attn To', 'Location', and 'Item' fields. An 'Add Item' button is positioned to the right of the 'Qty' field. At the bottom of the form area are three buttons: 'Save', 'Header', and 'Return'. Below these buttons is a table with two columns: 'Item' and 'Qty'.

You use this page to enter items for receipt. The page displays the business unit and either the receipt ID that you entered or *Next*, indicating the system assigns a receipt ID when you save the mobile transaction.

When you click the Add Item button, the system adds the item and the quantity to receive in the lower section of the page. You can change the quantity and unit of measure in the section. For description only lines, the unit of measure and item category defaults from the purchase order business unit Mobile Receiving page fields.

You can also expand the Show icon to view additional information about receipt lines. The values in Show information table can vary depending on the Options settings for ad hoc receiving. You can view additional receipt line information if the Display Hide/Show in table check box is selected in the search options.

You can change the quantity of the item to receive and use the Delete button to remove the item from the ad hoc receipt. As you add items to the list, the most recent item appears at the top of the table list.

Click the Add Item button to continue adding items to the receipt. Each item that you add creates a new receipt line. When you finish adding items to the receipt, click the Save button. The system creates the new ad hoc receipt and updates the PeopleSoft system with the information.

**Pro Number (progressive number)** Enter the tracking number assigned to the shipment in which the material arrived.

**Attn To (attention to)** Enter the person to whom, and/or place to where the services or goods are to be delivered. The system adds the value that you enter to the RECV\_LN\_DISTRIB record.

If the person selected is a valid value in the PeopleSoft system, then the system populates the Location field. However, you can enter an value in this field that is not in the PeopleSoft system.

|                            |   |
|----------------------------|---|
| <b>Location</b>            | Enter a location to indicate where the item is to be delivered. If a default value exists for the field, you can override the value. The Location field is required.  |
| <b>Item</b>                | Enter the item ID that you are receiving. You must enter either an item ID or an item description. The item is added to the receipt as a receipt line. If you enter the item ID, the system populates the Descr field with the item's description and the UOM with the item's standard UOM.   |
| <b>Descr (description)</b> | <p>Enter a value that describes the item being received. If an item is entered, the system provides the default value for the item's description. You cannot change the description. If you do not enter an item, the Descr field is required so you must enter a description.</p> <p>When you enter an item the system does not immediately display the item's description. After you click the Add Item button, the system adds the item to the table and the item description appears with the item.</p>   |
| <b>Qty (quantity)</b>      | Enter the quantity of the item that you are receiving for this ad hoc receipt line. The Qty field is required. When you enter a quantity and tab out of the field, the system triggers the Add Item functionality.  |
| <b>Add Item</b>            | <p>Click the Add Item button to add an item to a list of items that are being received. The Add Item feature is also initiated when you tab out of the Qty field. Once you have performed the Add Item feature, the most recent item added appears at the top of the list of items and the cursor is placed on the Pro Number field.</p> <p>For the Receiving Ad Hoc - Receive Item page, the Save button, Header link, and Return to Search link appear at the top of the table. When there are two or more rows, these fields appear at the top and at the bottom of the table.</p> |

After you enter an item description, and click the Add Item button, the system updates the page as shown in this example:

**Image: Receiving Ad Hoc - Add Item page**

This example illustrates the fields and controls on the Receiving Ad Hoc - Add Item page. You can find definitions for the fields and controls later on this page.

**Header**

Click to update receipt header information such as Receipt Source, Carrier, and Pro Number.

See [Receiving Ad Hoc - Header Details Page](#).

**Return to Add**

Click to access the Receiving Ad Hoc - Add page where you can begin another receipt. You will receive a warning message if you click this button prior to saving the receipt you are processing.

**Qty (quantity)**

Enter the quantity of the item that you are receiving. The unit of measure appears with the quantity. You can change the unit of measure.

 **(Delete icon)**

Click to delete an item from the table list. The system removes the item and refreshes the list.

**Receiving Ad Hoc - Header Details Page**

Use the Receiving Ad Hoc - Header Details page to update ad hoc receipt header information.

## Navigation

Mobile Inventory, Receiving Ad Hoc, click the Add button, and click the Header link.

### Image: Receiving Ad Hoc - Header Details page

This example illustrates the fields and controls on the Receiving Ad Hoc - Header Details page. You can find definitions for the fields and controls later on this page.

| Mobile Inventory |                      | Sign Out     |
|------------------|----------------------|--------------|
| Header Details   |                      | (US015\NEXT) |
| Vendor           | SCM0000003           |              |
| Ship To          | US001                |              |
| Receipt Source   | <input type="text"/> |              |
| Carrier          | <input type="text"/> |              |
| Pro Number       | <input type="text"/> |              |
| OK Cancel        |                      |              |

Use this page to view or define header information for an ad hoc receipt.

#### Receipt Source

Enter the source of the receipt if the supplier does not exist in the PeopleSoft system.

#### Carrier

Enter the freight carrier that delivered the shipment.

#### Pro Number (progressive number)

Enter the tracking number assigned to the shipment in which the material arrived. When you add the number and click the OK button, the system updates the Pro Number field on the Receiving Ad Hoc - Receive Item page and also updates the Pro number for all receipt lines with a blank Pro number

## Receipt Created Page

Use the Receipt Created page to confirm receipt creation.

### Navigation

Click the Save button on the Receiving Ad Hoc page.

The system displays this page after you successfully create ad hoc receipts. The information includes the business unit in which the receipt was created and the receipt number. You can now access the receipt information using the PeopleSoft system.

Click the OK button to access the Receiving Ad Hoc page, where you can add another ad hoc receipt.

Receipts that you create using Mobile Receiving and Receiving Ad Hoc components will have a Receive Source field value of Mobile. Also, if you selected the Print Delivery Flag check box, when you save the receipt, the system triggers the Print Delivery process, RECV\_DEL multi-process job.

## Chapter 5

# Using Mobile Inventory Putaway

## Understanding PeopleSoft Mobile Inventory Putaway

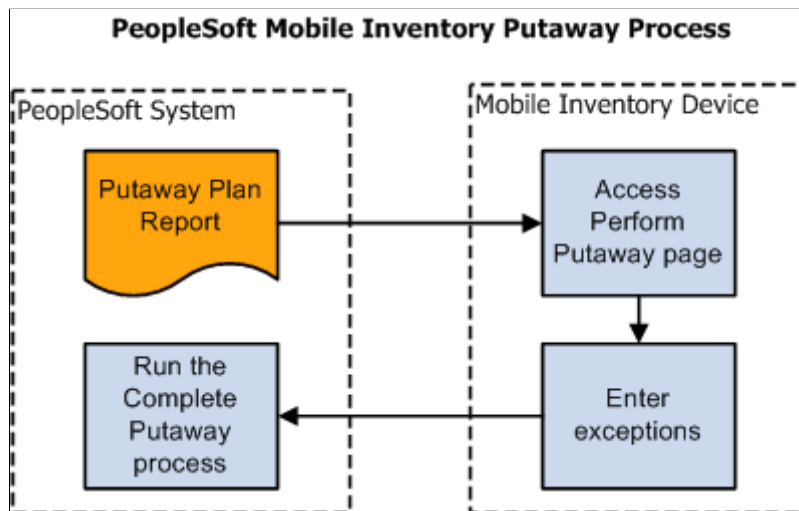
This section discusses how to putaway stock using a mobile device.

The mobile inventory task flow for this feature is Perform Putaway.

The Mobile Inventory Putaway feature is designed for organizations who use a paper-based report to move items from the receiving area to their proper storage location. The mobile device is used to record the transaction after the physical movement.

### Image: PeopleSoft Mobile Inventory Putaway process

This diagram illustrates the PeopleSoft Mobile Inventory Putaway process:



## How to Putaway Stock Using a Mobile Device

This section lists the steps to putaway stock using a mobile device in PeopleSoft Mobile Inventory Management:

1. Print or obtain a Material Putaway Plan Report.

This report lists the plan ID and line numbers of the items that need to be placed into their storage locations.

2. Putaway material (Mobile Inventory, Perform Putaway).
  - a. Sign into your mobile device and select Mobile Inventory, Perform Putaway.
  - b. Using the Perform Putaway page.

- c. Enter a plan ID and fetch.
  - d. Using the Perform Putaway - Select page, to verify the lines of the putaway plan and to indicate that they are ready to complete.  
  
Use the Include check box to indicate that the location and quantity that is displayed on your mobile device is correct.  
  
Use the Edit link to access the Perform Putaway - Edit page to change the location, quantity, lot ID, or unit of measure (UOM).
  - e. Click the OK button to return to the Perform Putaway - Select page.
  - f. Click the Save button to record the putaway transaction.
3. Run the Complete Putaway process in the PeopleSoft system (Inventory, Putaway Stock, Complete Putaway).

---

## Setting Up Options for Mobile Putaway

This section discusses how to:

- Define installation options for mobile putaway.
- Define user preferences for mobile putaway.

### Pages Used to Set Up Options for Mobile Putaway

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---|------------------------|---|---|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select Perform Putaway in the Task Flow field.               | Define installation options for the Perform Putaway task flow |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, Define User Preferences, Mobile Inventory. Select Perform Putaway in the Task Flow field. | Define user preferences for the Perform Putaway task flow.    |

### Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to .

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select Perform Putaway in the Task Flow field.

### Image: Installation Options - Mobile Inventory page for the Perform Putaway task flow

This example illustrates the fields and controls on the Installation Options - Mobile Inventory page for the Perform Putaway task flow. You can find definitions for the fields and controls later on this page.

Use this page to set up default options for the Perform Putaway task flow at the installation level for mobile devices. These values can be overridden for a specific user on the User Preferences - Mobile Inventory page. During the task flow session some values can override the installation values, the user preferences values, or both .

#### Task Flow

Identifies the Mobile Inventory Management task flow that uses the settings on this page. Select *Perform Putaway* to define installation-level options for the Perform Putaway task flow.

#### Rows Displayed

Enter the maximum number of items to display on the Perform Putaway page. You can update this value using the Options table on the Perform Putaway page.

#### Display Lookups

Select to display the Lookup icon for the fields on the Perform Putaway page. The Lookup icon enables you to view a list of values and select one.

#### Display Description

Select to display the item descriptions on the Perform Putaway page when using a mobile device.

#### Collapse Header

Select to indicate that the header should be collapsed. You can also change the setting using the Options table on the Perform Putaway page.

#### Display Filter Related Fields

Select this check box to display the Filter field and Filter button on the Perform Putaway page. Deselect this check box to remove the filter functionality from the pages.

**Display Show/Hide in tables**

Select to display the Show and Hide options for Perform Putaway pages. The options make it possible for you to expand and collapse extra line information in tables.

**Filter All Alternate Items**

Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID ( MASTER\_ITEM\_TBL) that matches the alternate is shown in the table.

Deselect to indicate that the system should not use alternate item identifiers to filter the table. This can improve system performance for the task flow.

## User Preferences - Mobile Inventory Page

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to define user preferences for the Perform Putaway task flow.

**Navigation**

Set Up Financials/Supply Chain, Common Definitions, Define User Preferences, Mobile Inventory. Select Perform Putaway in the Task Flow field.

Use this page to override the options selected on the Installation Options - Mobile Inventory page, for a specific user ID.

The values on this page are the same as those on the installation options page.

**Use Installation Values**

Select to apply the values from the Installation Options - Mobile Inventory page for the same task flow. When you select this option, the display options on this page are no longer available.

See [Installation Options - Mobile Inventory Page](#).

## Performing Putaway Using a Mobile Device

This section discusses how to:

- Select a putaway plan.
- Change putaway options.
- Select items for putaway.
- Edit putaway details.

## Pages Used to Perform Putaway Using a Mobile Device

Use these pages to perform putaway using a mobile device:

| <b>Page Name</b>          | <b>Navigation</b>   | <b>Usage</b>            |
|---------------------------|---|-------------------------|
| Perform Putaway           | Mobile Inventory, Perform Putaway   | Select a putaway plan.  |
| Perform Putaway - Options | Mobile Inventory, Perform Putaway.<br>Click the Options link  | Change putaway options. |
| Perform Putaway - Detail  | Mobile Inventory, Perform Putaway.<br>Enter a business unit and plan ID and click the Fetch button. To the right of an item, click the Edit link. | Edit putaway details.   |

## Perform Putaway: Header Page

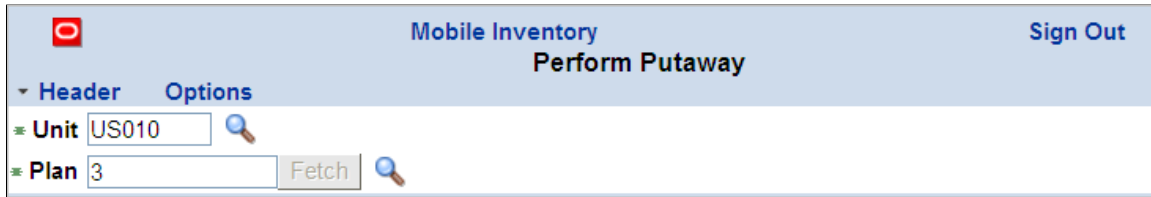
Use the Perform Putaway: Header page to select a putaway plan

### Navigation

Mobile Inventory, Perform Putaway

### Image: Perform Putaway: Header page

This example illustrates the fields and controls on the Perform Putaway: Header page. You can find definitions for the fields and controls later on this page.



Use this page to select a putaway plan. You must enter a business unit and a plan ID.

### Plan

Enter or look up a putaway plan ID. The system select the plan ID when you tab out of the field or click the Fetch button.

---

**Note:** It is required to enter a plan ID.

---

## Perform Putaway: Options Page

Use the Perform Putaway: Options page to change putaway options

## Navigation

Mobile Inventory, Perform Putaway. Click the Options link

### Image: Perform Putaway: Options page

This example illustrates the fields and controls on the Perform Putaway: Options page.

Use this page to change processing and display options for the perform putaway task flow. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

## Perform Putaway - Select Page

### Navigation

Mobile Inventory, Perform Putaway. Enter a business unit and plan ID and click the Fetch button.

### Image: Perform Putaway - Select page

This example illustrates the fields and controls on the Perform Putaway - Select page. You can find definitions for the fields and controls later on this page.

| Incl                                | Item                                  | Location       | Qty        | Edit |
|-------------------------------------|---------------------------------------|----------------|------------|------|
| <input checked="" type="checkbox"/> | 10009<br>Mountain Bike Gloves, Mens   | AREA3\A1\R1\B1 | 4800<br>EA | Edit |
| <input type="checkbox"/>            | 10010<br>Mountain Bike Gloves, Womens | AREA3\A1\R1\B1 | 4800<br>EA | Edit |

Use this page to indicate that an item has been placed in the appropriate storage location.

### Display

Select a display option that limits or expands the number of items viewed in the Options table.

Options include:

- *All*: Display all items that are stored in the putaway plan.

- *Exclude*: Display only items in the locations that are not yet included in the putaway plan.
- *Include*: Display only items that are included in the current putaway plan.

## Filter

Use the Filter field and button to limit your existing search results (items in the results section below) to rows that meet your criteria. This field reduces the original search results to a smaller number of rows so you can focus on an area of interest.

The filter options are available if you selected Display Filter check box on the Perform Putaway - Options page.

Use the Filter field to enter a value to compare to the existing search results. Filter criteria can include item ID, item description, unit of measure, location, manufacturer ID, and manufacture item ID.

Click the Filter button to apply your filter value to the existing search results and display only the rows that match your filter.

The filter feature is also initiated when you tab out of the Filter field. For example, if you enter 10009, then the search results are reduced to display only item 10009.

---

**Note:** The Filter feature is applied to the existing fetch results and does not perform another search on data in the PeopleSoft Inventory system.

---



---

**Note:** After a filter has been applied, any future actions are performed on the filtered results not the original search results.

---

## Incl (include)

Select to indicate that this item should be included or excluded in the Complete Putaway transaction. This check box is automatically selected if the putaway line has been edited.

## Edit

Click this link to access the Perform Putaway - Detail page where you can change the storage location, quantity, unit of measure, and enter comments.

## Save

Click to indicate that the selected putaway lines are ready to be processed by the Complete Putaway process.



(select all)

Click to select all of the items that are currently displayed on the Perform Putaway page. Items that do not appear on the page, due to the Filter, are not selected.



(deselect all)

Click to deselect all of the items that are currently displayed on the Perform Putaway page. Items that do not appear on the page, due to the Filter, are not deselected.

## Editing Putaway Details

Use the Perform Putaway - Select page to edit putaway details

### Navigation

Mobile Inventory, Perform Putaway. Enter a business unit and plan ID and click the Fetch button. To the right of an item, click the Edit link.

### Image: Perform Putaway - Detail page

This example illustrates the fields and controls on the Perform Putaway - Detail page.

The screenshot shows the 'Perform Putaway' detail page in the Mobile Inventory application. The page header includes a red square icon, the text 'Mobile Inventory', and a 'Sign Out' link. Below the header, there is a breadcrumb trail 'US010 \ 3' and an 'Options' menu. The main content area contains the following fields and controls:

- Include**: A checked checkbox.
- Item**: The value '10009' with the description 'Mountain Bike Gloves, Mens' below it.
- Location**: A text input field containing 'AREA3\A1\R1\B1' with a magnifying glass icon to its right.
- Qty**: A text input field containing '4800' and a unit of measure dropdown menu set to 'EA' with a magnifying glass icon to its right.
- Comments**: A text area with up and down arrow icons on the right side.

At the bottom of the form, there are three buttons: 'OK', 'Cancel', and 'Add'.

Use this page to change the storage location, quantity, or unit of measure, and to enter comments for an item on the putaway plan.

## Chapter 6

# Using Mobile Delivery

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## Understanding How to Record Deliveries in PeopleSoft Purchasing Using Mobile Inventory Management

Using the PeopleSoft Purchasing receiving business process you can receive, inspect, return, and deliver received goods. Receiving and delivery rules are defined in the business processes leading up to the actual receipt. These processes include setting up items and creating requisitions and purchase orders.

When stock arrives at the receiving location, you can receive it using the PeopleSoft Purchasing Receiving component or the Mobile Receiving task flow. After receiving the stock, you can use the Mobile Delivery task flow to record the final destination for delivered items, view location and ship to information relevant to the delivery of the items, and to whom the items were delivered. Delivery information exists at the receipt distribution level and originates from either a requisition or purchase order. The recorded results of deliveries are sent back to the PeopleSoft system using a Component Interface based on the RECV\_DELIVERY component.

Mobile deliveries can include purchase receipts, non-inventory receipts that include description only receipts, and inventory receipts. A delivery can include both purchase receipts and material stock requests and their delivery can be to a person or delivery location.

As part of Mobile Delivery, you can create mobile transactions to record:

- The delivery of a purchase order receipt.
- The delivery of an ad hoc receipt that is not associated with a supplier ID.
- The delivery of an ad hoc receipt that is associated with a supplier ID.
- The delivery of an item from a delivery cart.
- The person who delivered the items and the person who accepted the delivery, along with the date and time of delivery.
- Delivery feedback for the delivery transaction.

Along with Mobile Delivery task flow transactions, you can use the PeopleSoft system to:

- Maintain the Delivery Information PeopleSoft component displays and enter data in fields provided in the Mobile Delivery application.
- Perform an inquiry to review complete and incomplete deliveries.

The Mobile Delivery task flow requires the existence of a receipt; the receipt can be either a purchase order or an ad hoc receipt. Delivery information becomes available only after an item has been received.

As part of the receipt process, delivery documents are printed and attached to the received shipments. These shipments are then directed to their appropriate locations, such as an office, storage area, delivery

cart, or a person. Upon receiving the shipment, users can select items to be delivered using Mobile Delivery.

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**Note:** Using Mobile Delivery, you cannot deliver items to an inspection area first and then to their final destination. The system assumes that inspections are performed at receipt time or that if inspections take place later than receipt time, then the delivery represents the delivery to the final destination.

---

## Process Flow for Mobile Delivery

As part of the Mobile Delivery task flow, you begin with a search page that also provides advanced search criteria so you can better define the receipt lines that you want to deliver. The advanced search criteria enables you to enter additional search criteria that refines the search for receipt lines. For example, if you enter a business unit and a delivery document, and then you enter an item ID, the search results provide only receipt distribution lines that match all three criteria.

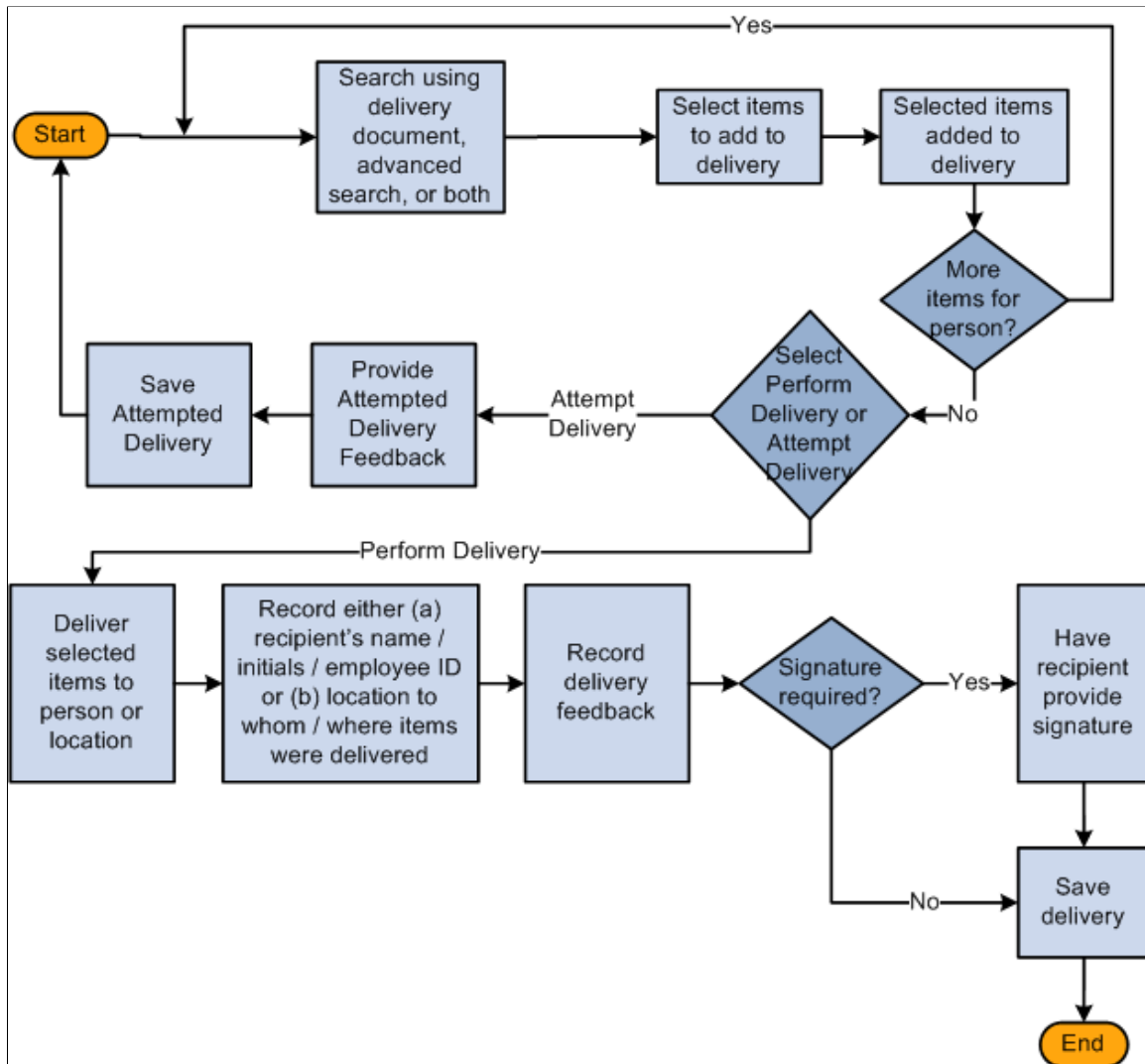
You can search for deliveries based on:

- Receipt number.
- Purchase order number.

- Tracking number (progressive number) that is stored as a child table of the receipt line (RECV\_LN\_PRO).

### Image: Delivery process flow

The next example illustrates the beginning of the Mobile Delivery task flow where you perform the search and continues through the process until you save the delivery:



Using the Mobile Delivery application, you cannot perform ad hoc deliveries; however, you can create an ad hoc receipt either in the PeopleSoft system or using a Mobile Receiving transaction. And, then perform a delivery using the Mobile Delivery transaction based on that receipt.

The process for the Mobile Delivery task flow is as follows:

1. Sign into the Mobile Inventory Management application and select Delivery.
2. Using the Delivery page, perform a search using the delivery document, advanced search criteria, or both.

The system provides the default business unit defined for the Mobile Delivery user. Using the Delivery: Advanced Search page, you can search on fields such as receipt number, item ID, attention

to person, and so on. Using the Delivery: Options page, you can define how information is displayed on Delivery pages.

3. Using the Select Items for Delivery page, select items to add to the delivery.

After adding receipt line items, you can add additional items.

4. Using the Select Delivery Option page, select *Perform Delivery* or *Attempt Delivery*.
5. If you selected Perform Delivery, use the Perform Delivery page to record the delivery of the selected items to the persons or locations.

From the Perform Delivery page, you can:

- Delete items from the delivery
- Record delivery feedback.
- Record a delivery signature.

If you selected Attempt Delivery, go to step 8.

6. Save the delivery.

After you click the Save button, the system provides a delivery confirmation page.

7. Click OK on the delivery confirmation page.

The system takes you to the Delivery page to begin another delivery.

8. If you selected Attempt Delivery, use the Delivery: Attempt Feedback page to record why the delivery could not be completed in the Attempt Feedback section.
9. Click the Save Attempt button.

After you save the delivery attempt, the system provides confirmation page.

10. Click OK on the attempt delivery confirmation page.

The system updates the PeopleSoft system with the new delivery information by recording the recipient's name, initials, or ID or the location to whom or where the items were delivered.

In addition to providing the default date, the system defaults the time and the user name of the person who performed the delivery.

---

**Note:** The Mobile Delivery task flow also supports the business process flow where an employee goes to a location, such as a mail room, to pick up a package that has been received for them.

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## Setting Up the PeopleSoft System for Use with Mobile Delivery

This section discusses how to:

- Establish Mobile Delivery installation options.

- Define Mobile Delivery user preferences.
- Set up delivery feedback codes.

## Pages Used to Set Up the PeopleSoft System for Mobile Delivery

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---|------------------------|---|---|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options   | Establish Mobile Delivery installation options.   |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Mobile Inventory                          | Establish Mobile Delivery user preferences options. You can use this page to default all user preferences to those defined in the installation options. |
| Business Unit Options                   | BUS_UNIT_TBL_PM2       | Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition, Business Unit Options | Determine if a signature is required from the individual receiving a delivery for the receiving business unit.  |
| Delivery Feedback                       | MIN_DLV_FEEDBACK       | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Delivery Feedback                      | Set up delivery feedback codes and descriptions.  |

### Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to establish Mobile Delivery installation options.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options

### Image: Installation Options - Mobile Inventory: Delivery task flow page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Delivery task flow page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It has two main sections: 'System Options' and 'Task Options'.  
 In 'System Options':  
 - 'Key Concatenation Separator' is an empty text field.  
 - 'Role Name' is a text field containing 'MIN User'.  
 - 'Delivery Signature Required' is a checked checkbox.  
 In 'Task Options':  
 - '\*Task Flow' is a dropdown menu set to 'Delivery'.  
 - 'Rows Displayed' is a text field containing '10'.  
 - Checkboxes: 'Display Lookups', 'Display Description', 'Display Filter Related Fields', 'Save Delivery Document', 'Default Delivered To', and 'Filter All Alternate Items' are all checked. 'Auto Add Search Results' and 'Display Show/Hide in tables' are unchecked.  
 - 'Select Items Sort By' and 'Perform Delivery Sort By' are dropdown menus both set to 'Item ID'.  
 - At the top right of the 'Task Options' section, there are navigation links: 'Find | View All | First 9 of 15 | Last'.

You use the installation options to define default values for Mobile Delivery pages in the PeopleSoft system and to define page values available on a mobile device.

### Delivery Signature Required

Select to indicate that the mobile application requires a signature of the person receiving the delivery. When this option is selected, the Perform Delivery page requires a signature.

See [Perform Delivery Page](#).

### Rows Displayed

Enter the maximum number of rows that you want to display in the tables for the Mobile Delivery task flow.

### Display Lookups

Select this check box to display the Lookup icon for all the search fields Delivery pages on the mobile device. The Lookup icon enables you to view a list of options and select one.

### Display Description

Select to display the item descriptions on the Delivery pages on the mobile device.

---

**Note:** The system ignores this setting when an item is a description only item.

---

### Display Filter Related Fields

Select to display the Filter field and Filter and Clear buttons on Mobile Delivery pages. Deselect the check box to remove the filter functionality from the pages.

|  |  |
|--|--|
| <b>Display Show/Hide in tables</b>               | Select to display the Hide and Show links or icons on delivery pages. You can expand and collapse additional item information sections using the links.  |
| <b>Auto Add Search Results</b>                   | Select to indicate that when a search is performed for the task flow, then all matching receipt distribution lines are automatically added to the delivery.  |
| <b>Save Delivery Document</b>                    | Select to indicate that the Delivery Document field is to remain populated after a delivery is saved.  |
| <b>Default Delivered To default delivered to</b> | <p>Select to indicate that the Mobile Delivery task flow should attempt to provide a default value for the Delivered To field that is based on a hard-coded hierarchy of fields.</p> <p>If this check box is selected, the system defaults the Delivered To field to:</p> <ul style="list-style-type: none"> <li>• The Attention To field, if it is the same across all receipt distribution lines in the delivery, then;</li> <li>• If the Attention To field value isn't the same across all delivery lines, the system defaults the Delivered To field to the Requester Name field, if the field is the same across all receipt distribution lines in the delivery, then;</li> <li>• If the Requester Name field isn't the same across all delivery lines, the system defaults the Delivered To field to the Location field, if it is the same across all receipt distribution lines in the delivery, then;</li> <li>• If none of the three fields are the same, the system does not provide a default value for the Delivered To field. Select how you want to define the ascending order in which items and locations are sorted on the Select Items for Delivery page in the Mobile Delivery task flow.</li> </ul> |
| <b>Select Items Sort By</b>                      | <p>Select how you want to define the ascending order in which items and locations are sorted on the Select Items for Delivery page in the Mobile Delivery task flow.</p> <p>Valid values include:</p> <ul style="list-style-type: none"> <li>• <i>Item ID</i>: Select to sort items and locations on the Select Items for Delivery page by item ID. This is the default value for the installation options.</li> <li>• <i>Deliver To</i>: Select to sort items and locations on the Select Items for Delivery page by the requester.</li> </ul>  |
| <b>Perform Delivery Sort By</b>                  | <p>Select how you want to define the ascending order in which items and locations are sorted on the Perform Delivery page in the Mobile Delivery task flow.</p> <p>Valid values include:</p>   |

- *Item ID*: Select to sort the items and locations on the Perform Delivery page by item ID. This is the default value for the installation options.
- *Deliver To*: Select to sort the items and locations on the Perform Delivery page by the requester.

### **Filter All Alternate Items**

Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID ( MASTER\_ITEM\_TBL) that matches the alternate is shown in the table.

Deselect to indicate that the system should not use alternate item identifiers to filter the table. This can improve system performance for the task flow.

See [Installation Options - Mobile Inventory Page](#).

## **User Preferences - Mobile Inventory Page**

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to establish Mobile Delivery user preferences options.

You can use this page to default all user preferences to those defined in the installation options.

### **Navigation**

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Mobile Inventory

This page uses the same values as the corresponding Installation - Mobile Delivery page. When you are setting up user preferences, you can select the Use Installation Values check box to use installation values instead of defining user preferences. When you select the check box, user preferences values are not longer available.

See [Installation Options - Mobile Inventory Page](#).

## **Delivery Feedback Page**

Use the Delivery Feedback page (MIN\_DLV\_FEEDBACK) to set up delivery feedback codes and descriptions.

## Navigation

Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Delivery Feedback

### Image: Mobile Delivery Feedback page

This example illustrates the fields and controls on the Mobile Delivery Feedback page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mobile Delivery Feedback' page. At the top, there is a title bar with the text 'Mobile Delivery Feedback'. Below this, there is a navigation bar with the text 'Delivery Feedback' and 'Personalize | Find |' followed by icons for a document and a calendar. To the right of the navigation bar, there are controls for 'First', '1-4 of 4', and 'Last'. The main content area is a table with the following structure:

|   | Delivery Feedback Code         | Delivery Feedback                                      |                                  |                                  |
|---|--------------------------------|--|----------------------------------|----------------------------------|
| 1 | <input type="text" value="1"/> | <input type="text" value="Delivered to Mail Room"/>    | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 2 | <input type="text" value="2"/> | <input type="text" value="Delivered to Office"/>       | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 3 | <input type="text" value="3"/> | <input type="text" value="Delivered to Cubicle"/>      | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 4 | <input type="text" value="4"/> | <input type="text" value="Delivered to Work Station"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Use this page to provide delivery feedback codes when you use a mobile device to record the delivery of receipt line items.

### Feedback Code

Enter a feedback code for use with the Mobile Delivery task flow. The field value must be numeric and is limited to three numbers.

### Delivery Feedback

Enter a description for the feedback code. When mobile device users make the deliveries, they can select the Delivery Feedback link to view and select the codes and their descriptions that you define on this page.

The next example is how the mobile device page appears with a code entered:

**Image: Delivery page with feedback**

This example illustrates the fields and controls on the Delivery page with feedback.

The screenshot shows the 'Mobile Inventory Delivery' page. At the top, there is a header with a red 'O' icon, the text 'Mobile Inventory Delivery', and a 'Sign Out' link. Below the header, the 'Delivered To' field contains 'CALVIN ROTH'. A 'Delivery Feedback' section is expanded, showing a 'Code' field with a magnifying glass icon and a 'Feedback' text area. Below this are 'Signature' and 'Options' sections. A 'Filter' section includes a text input, a 'Filter' button, and a 'Clear' button. A table lists items for delivery:

| Item                | Qty     | Deliver To  |   |
|---------------------|---------|-------------|---|
| Data Network Cables | 1<br>EA | Calvin Roth | ✘ |

At the bottom, there are 'Save' and 'Return to Select Items' buttons.

## Processing Deliveries Using Mobile Devices

This section discusses how to:

- Search for items to add to a delivery.
- Select items for delivery.
- Select a delivery option.
- View delivery comments.
- Perform delivery of Mobile Inventory items.
- Provide delivery feedback.
- Add a signature to a delivery.
- Record delivery attempts.

## Pages Used to Process Mobile Delivery Using Mobile Devices

Use these pages to process mobile deliveries.

| <b>Page Name</b>                    | <b>Navigation</b>  | <b>Usage</b>                                |
|-------------------------------------|--|---|
| Delivery                            | Mobile Inventory, Delivery   | Search for items to add to a delivery.      |
| Select Items for Delivery           | Mobile Inventory, Delivery, and click the Search button on the Select Items for Delivery page  | Select items for delivery.                  |
| Select Delivery Option              | From the select items for Delivery page, click the Add to Delivery button  | Select a delivery option.                   |
| Select Items for Delivery: Comments | Mobile Inventory, Delivery. Click the Comments icon from one of these pages: <ul style="list-style-type: none"> <li>• Select Items for Delivery</li> <li>• Perform Delivery</li> <li>• Delivery: Attempt Feedback</li> </ul> | View delivery comments.                     |
| Perform Delivery                    | Mobile Inventory, Delivery. Click the Add to Delivery link on the Select Items for Delivery page, and then click the Perform Delivery link.  | Perform delivery of Mobile Inventory items. |
| Delivery - Delivery Feedback        | Click the Delivery Feedback link on the Delivery page  | Provide delivery feedback.                  |
| Perform Delivery - Signature        | Mobile Inventory, Delivery. Click the Add to Delivery link on the Select Items for Delivery page, click the Perform Delivery link, and then click the Signature link.  | Add a signature to a delivery.              |
| Perform Delivery - Attempt Feedback | Mobile Inventory, Delivery. Click the Add to Delivery link on the Select Items for Delivery page, and then click the Attempt Delivery link.  | Record delivery attempts.                   |

### Select Items for Delivery Page

Use the Select Items for Delivery page to search for items to add to a delivery.

## Navigation

Mobile Inventory, Delivery

### Image: Delivery page (1 of 3)

This example illustrates the fields and controls on the Delivery page (1 of 3). You can find definitions for the fields and controls later on this page.

**Note:** You must select the business unit and it is recommended that you select at least one other search option to retrieve receipt lines for delivery. When searching for only a business unit, it might result in slow performance and result in returning more than 300 rows of data.

|   |   |
|---|---|
| <b>Unit</b>                                 | Displays the user's default business unit. Depending on the search criteria that you entered, the unit could be the receiving or purchasing business unit.  |
| <b>Delivery Document</b><br><b>document</b> | Enter a delivery document on which to base the search. The document could be, for example, a receipt number, purchase order number, a pro number, such as a tracking number, or a delivery cart number. You can enter a receipt or purchase order without the leading zeros and the system can find the value; for example, to find the receipt number 000000115 you can enter 115.<br><br>If the Save Delivery Document check box is selected on the Installation Options - Mobile Inventory page, or the User Preferences - Mobile Inventory page. for the task flow, then this field remains populated after clicking the Save button. |
| <b>Search</b>                               | Click to search for items matching the criteria that you enter. The system displays the matching receipt distribution lines. Receipts in a Closed or Cancelled status are not included in the returned lines. The Search feature is also initiated when you tab out of the Delivery Document field.   |
| <b>Advanced Search</b>                      | Click to enter advanced search criteria for receipt lines. For example you can define specific item IDs, receipt dates, and requesters.   |
| <b>Options</b>                              | Click to expand the Options table where you can define processing display options for receipt delivery searches.  |

## Advanced Search

Use the Advanced Search table

### Navigation

Click the Advanced Search link on the Delivery page

### Image: Delivery: Advanced Search page (2 of 3)

This example illustrates the fields and controls on the Delivery: Advanced Search page (2 of 3). You can find definitions for the fields and controls later on this page.

Use the Advanced Search table to define more specific information to find receipts. If the system does not find results based on the advanced search criteria, the Advanced Search area remains expanded.

**Note:** Searches are not case sensitive and partial searches are possible for all of the advanced search fields, except for the Unit and PO Unit (purchase order business unit) fields, which must be exact, and the Receipt Date field.

### Receipt

Enter a receipt number on which to base a search for receipts. A receipt must exist in order to deliver items. You can enter a receipt without the leading zeros and the system can find the value; for example, to find the receipt number 000000115 you can enter 115.

### Delivery Cart

Select a delivery cart on which to base the search. When doing a search for this field, the system displays all active delivery carts for the receiving business unit.

|  |  |
|--|--|
| <b>Item</b>                            | <p>Select a PeopleSoft system item ID on which to base the receipt search. You can use the Lookup icon to locate and select an item ID.</p> <p>After entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.</p> <p>See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>   |
| <b>PO Unit (purchase order unit)</b>   | <p>Enter a purchase order business unit on which to base a receipt search. The business unit and purchase order business unit must be setup as matching. You can use the Lookup icon to locate and select a business unit.</p>   |
| <b>PO ID (purchase order ID)</b>       | <p>Select a purchase order on which to base a search for receipts. The search result will include receipts for the purchase order that you enter. You can enter a purchase order without the leading zeros and the system can find the value; for example, to find the purchase order 000000115 you can enter 115.</p> <p>A purchase order unit is required for the PO ID Lookup icon to work. You can use the Lookup icon to locate and select a purchase order ID.</p> |
| <b>Ship To</b>                         | <p>Select a ship to location to reduce the search to just that location and any other selection criteria that you enter. You can use the Lookup icon to locate and select a ship to location.</p>  |
| <b>Receipt Date</b>                    | <p>Enter a specific receipt date on which to base the item search. The date must be entered in the correct format. The system only displays the receipts created on or before the date that you enter.</p>   |
| <b>Attention To</b>                    | <p>Enter the person on which to base your search for items to deliver. The system retrieves the purchase order receipt lines that match the attention to person you enter. You can also use the Lookup icon to locate and select the attention to user</p>   |
| <b>Location</b>                        | <p>Select the location for which you want to search for receipt lines to deliver. You can use the Lookup icon.</p>   |
| <b>Requester</b>                       | <p>Select the requester for whom you want to search for receipt lines to deliver. You can use the Lookup icon.</p>   |
| <b>Pro Number (progressive number)</b> | <p>Select the progressive number on which to base the search for receipt lines to deliver. The system provides the receipt line with that progressive number. It's possible to have multiple Pro numbers on a receipt.</p> <p>If you perform a search based on the Pro number, the Mobile Delivery component retrieves all the receipt distribution lines that have a parent line with that Pro number associated to it.</p>   |

## Options

Use the Select Items for Delivery - Options page to select a delivery option

### Navigation

From the select items for Delivery page, click the Add to Delivery button

### Image: Delivery: Options page (3 of 3)

This example illustrates the fields and controls on the Delivery: Options page (3 of 3). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mobile Inventory Delivery' interface. At the top, there is a 'Sign Out' button. Below the header, there is a search bar with 'Unit US015' and a magnifying glass icon. A 'Delivery Document' field with a 'Search' button is also present. The main section is titled 'Advanced Search Options' and contains several settings:

- Rows To Display:** A text input field containing '10'.
- Select Items Sort By:** A dropdown menu set to 'Item ID'.
- Perform Delivery Sort By:** A dropdown menu set to 'Item ID'.
- Default Delivery Cart:** A list of checkboxes:
  - Default Delivered To
  - Display Description
  - Display Show/Hide in tables
  - Display Filter
  - Display Lookups
  - Auto Add Search Results
  - Save Delivery Document
  - Use Default Delivery Cart
  - Signature Required
  - Filter All Alternate Items

Use this page to change processing and display options for receipt line searches. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page and most fields can be changed for this session.

The values that you select control what information appears in the Select Items for Delivery and the Perform Delivery pages.

#### Rows to Display

Enter the number of rows that you want to display for the current session. When you collapse the Options table, the system saves the information you entered and uses it for this session.

#### Select Items Sort By

Select how you want to define the ascending order in which items and locations are sorted on the Select Items for Delivery and Advanced Search Results pages in the Mobile Delivery application.

Valid values include:

- *Item ID*: Select to sort items and locations on the Select Items for Delivery page by item ID. This is the default value for the installation options.
- *Deliver To*: Select to sort items and locations on the Select Items for Delivery page by the requester.

### **Perform Delivery Sort By**

Select how you want to define the ascending order in which items and locations are sorted on the Perform Delivery page in the Mobile Delivery application.

Valid values include:

- *Item ID*: Select to sort the items and locations on the Perform Delivery page by item ID. This is the default value for the installation options.
- *Deliver To*: Select to sort the items and locations on the Perform Delivery page by the value in the Deliver To field.

### **Default Delivered To**

Click to indicate that the Mobile Delivery application should attempt to provide a default value for the Delivered To field that is based on a hard-coded hierarchy of fields.

See [Installation Options - Mobile Inventory Page](#) .

### **Display Description**

Select to display the item description on the Delivery pages for the session.

### **Display Show/Hide in tables**

Select to display the Show and Hide links on the Select Items for Delivery page after you perform the search. These values enable you to expand and collapse additional information sections for items.

### **Display Filter**

Select to display the Filter field and the Filter and Clear buttons on the Select Items for Delivery page after you perform the search and on the Perform Delivery page. Deselect the check box to remove the filter functionality from the Delivery pages.

### **Display Lookups**

Select to show Lookup icons on the Delivery pages.

### **Auto Add Search Results**

Select to indicate that when a search is performed for the task flow, then all matching receipt distribution lines are automatically added to the delivery.

### **Save Delivery Document**

Select to indicate that:

- In the Delivery mobile application, the Delivery Document field is to remain populated after a delivery is saved.
- In the Delivery Cart mobile application, the Delivery Document field is to remain populated after items are added to a delivery cart.

### **Signature Required**

Displays the option selected in the Delivery Signature Required field on the Installation Options – Mobile Inventory or the

Business Unit Options page for the Purchasing Business Unit.  
This field cannot be changed.

### **Filter All Alternate Items**

Displays the option selected on the Installation Options – Mobile Inventory or the User Preferences - Mobile Inventory page. This field cannot be changed.

If this option is selected, then the system searches through all possible alternate item identifiers when filtering a table. If an alternate item identifier is entered in the Filter field, then the item ID that matches the alternate is displayed in the table.

If this option is not selected, then the system does not use alternate item identifiers to filter the table. This can improve system performance for the task flow.

## **Select Items for Delivery Page**

Use the Select Items for Delivery page to select items for delivery

## Navigation

Mobile Inventory, Delivery, and click the Search button on the Select Items for Delivery page

### Image: Select Items for Delivery page

This example illustrates the fields and controls on the Select Items for Delivery page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mobile Inventory Delivery' interface. At the top, there is a 'Sign Out' button. Below it, the 'Unit' is set to 'US001'. The 'Delivery Document' is 'WAB06R' with a 'Search' button. There are links for 'Advanced Search' and 'Options'. A 'Filter' field is present with 'Filter' and 'Clear' buttons. The main table lists items with columns for selection, item details, quantity, and delivery location. Below the table, distribution details are shown: 'Distrib 3\1\1', 'Requester Kenneth Schumacher', 'Due Date 08/14/2011', 'Stock UOM EA', 'Ship To US001 USA - New York', and 'Location US001 USA - New York'. At the bottom, there is an 'Add to Delivery' button.

|   | Sel                                 | Item                             | Qty     | Deliver To  |  |
|---|-------------------------------------|----------------------------------|---------|-------------|--|
| ▼   | <input checked="" type="checkbox"/> | 10016<br>TC8799 Cyclometer       | 1<br>EA | Duke Otoshi |  |
| <b>Distrib 3\1\1</b><br><b>Requester</b> Kenneth Schumacher<br><b>Due Date</b> 08/14/2011<br><b>Stock UOM</b> EA<br><b>Ship To</b> US001<br>USA - New York<br><b>Location</b> US001<br>USA - New York |                                     |                                  |         |             |  |
| ▶   | <input checked="" type="checkbox"/> | 10024<br>Stainless Steel Padlock | 1<br>EA | Duke Otoshi |  |

After loading items from the initial search, you can further limit the contents of this page by filtering the data. To perform another search, enter a delivery document or click the Advanced Search link to define additional search criteria for the search, or both. Then click Search button or tab out of the Delivery Document field to initiate the search.

### Filter (field)

Enter a value by which to filter receipt distribution lines. You can filter by item ID, manufacturer item ID, supplier item ID, item description, delivery document, deliver to, attention to, or

location fields. You can enter a complete or a partial value. The Filter field is not case sensitive.

**Filter (button)**

Click to filter the list based on the Filter field value.

**Clear**

Click to remove the effects of the filter. Or, you can delete the filtering criteria from the Filter field and tab out of the field.



**Expand (right arrow)**

Click the Expand icon to view additional details about a receipt distribution line. The details include the distribution date, requester, due date, stocking UOM, ship to, and specific location information. Click the arrow icon again to hide the additional details.

If the Attention To value from the receipt distribution line is displayed in the Deliver To field, then the Requestor is displayed in the expanded section.

---

**Note:** Depending on mobile device view or screen settings, Show and Hide links can appear as right and down arrows.

---



**Collapse (down arrow)**

Click the Collapse icon to hide additional details about a receipt distribution line.

**Sel (select)**

Select to choose an item to add to the delivery. The default value is selected. When you click the Add to Delivery button, the system disables the Sel check box.

**Item ID**

Displays the item that was returned from the search. If you selected the Display Description check box, the description also appears with the item. If the item is configured, the configuration code is displayed instead of the description.

Also, if the item is a description only item, such as the item does not have an ID, then the description is displayed, regardless of the display description option.

**Qty (quantity)**

Displays the distribution quantity and the supplier's unit of measure.

**Deliver To**

Displays the name in which the item should be delivered.

If the Attention To field is populated on the receipt distribution line, then this field is populated with the value in the Attention To field.

If the Attention To field is not populated on the receipt distribution line, then this field is populated with the value in the Requester field.



**Comments**

Click to view any purchase order or receipt comments associated with the receipt line. Comments exist when the icon appears.



**Select All**

Click to select all of the items in the list. The system adds all selected items to the delivery when you click the Add to Delivery button.



**Deselect All**

Click to deselect all of the items in the list.

**Add to Delivery**

Click to add the selected items to deliver and disable them in the search results. When you add items to the delivery, the system displays the Perform Delivery link, which indicates how many items were added to the delivery, and then resets the Select Items for Delivery page.

If no items were selected when the Add to Delivery button is used, then the system displays a warning message that no items were selected.

To perform the delivery, click the Perform Delivery link and the system provides the Perform Delivery page where you can add delivery feedback and select to deliver the items.

---

**Note:** If a receipt distribution line is selected, but it is hidden based on the value in the Filter field, the line is not added to the delivery when you click the Add to Delivery button.

---

## Comments Page

Use the Comments page to view delivery comments


## Navigation

Mobile Inventory, Delivery. Click the Comments icon from one of these pages:

- Select Items for Delivery
- Perform Delivery
- Delivery: Attempt Feedback

### Image: Delivery Comments page

This example illustrates the fields and controls on the Delivery Comments page.

|  | Mobile Inventory<br><b>Comments</b><br>US001\WAB06R13 | <a href="#">Sign Out</a> |
|---|---|--------------------------|
| <b>Item 10016</b><br>TC8799 Cyclometer  |   |                          |
| <b>Quantity 1 EA</b>  |   |                          |
| <b>Deliver To Duke Otoshi</b>   |   |                          |
| <b>Comments</b>   |   |                          |
| Deliver to Duke's cube  |   |                          |
| Duke's bike computer  |   |                          |
| <a href="#">Return</a>  |   |                          |

When a receipt distribution line with a purchase order or receipt line comment associated with it, you can view the comments using this page. Comments for purchase order lines appear when the Show at Receipt check box is selected on the PO Line Comments page. The page displays all receipt line comments.

When you select an item for which to review comments, the system displays the item information, quantities to be delivered, and the name in the Deliver To field.

If a configuration code exists, then the system displays the configuration code instead of the item description.

If the Display Description check box is not selected on the Options page, then the item description is not displayed.

If there is no item ID, then the description is displayed, regardless of the option selected for the Display Description check box.

Click the Return link to navigate to the previous page.

## Select Items for Delivery - Options Page

Use the Select Items for Delivery - Options page to select a delivery option

## Navigation

From the select items for Delivery page, click the Add to Delivery button

### Image: Select Delivery Option page

This example illustrates the fields and controls on the Select Delivery Option page. You can find definitions for the fields and controls later on this page.

Use this page to select a delivery option.

### Perform Delivery

Click to access the Perform Delivery page where you can complete the delivery process. The link also indicates how many items have been added to the delivery after you add items to the delivery.

You can return to this page and add more items to the delivery list. The system updates the Perform Delivery link to count the additional items.

See [Perform Delivery Page](#).

### Attempt Delivery

Click to access the Attempt Delivery page where you can record a delivery that was not successful. The link also indicates how many items have been added to the delivery attempt after you add items to the delivery.

You can return to this page and add more items to the delivery and attempt delivery list. The system updates the Attempt Delivery link to count the additional items.

See [Perform Delivery: Attempt Feedback Page](#).

## Perform Delivery Page

Use the Perform Delivery page to perform delivery of Mobile Inventory items

**Navigation**

Mobile Inventory, Delivery. Click the Add to Delivery link on the Select Items for Delivery page, and then click the Perform Delivery link.

**Image: Perform Delivery page**

This example illustrates the fields and controls on the Perform Delivery page. You can find definitions for the fields and controls later on this page.

| Item                    | Qty    | Deliver To         |   |
|-------------------------|--------|--------------------|---|
| ▶ TEST SBI AND GLN      | 10 EA  | Kenneth Schumacher | ✘ |
| ▶ JW_TEST_ITEM          | 11 EA  | Kenneth Schumacher | ✘ |
| ▶ TEST                  | 100 EA | Kenneth Schumacher | ✘ |
| ▶ CGFLOT CGF TEST       | 3 EA   | Kenneth Schumacher | ✘ |
| ▶ CGFLOT CGF TEST       | 13 EA  | Kenneth Schumacher | ✘ |
| ▶ CGFSERIAL TEST        | 12 EA  | Kenneth Schumacher | ✘ |
| ▶ MT_SR1 TEST FOR SERIA | 10 BOX | Kenneth Schumacher | ✘ |
| ▶ SKY TEST ITEM         | 96 EA  | Kenneth Schumacher | ✘ |

Use this page to define the delivery items and details.

**Delivered To**

Enter a value to define an employee name, employee ID, employee initials or a location to which the items are being delivered. You can type this information or scan a bar code, such as an employee badge number or a location bar code.

---

**Note:** The system populates the Delivered To field if the Default Delivered To check box is selected and the lines added to the delivery meet the necessary criteria, such as having the same attention to, requester or location. The description of the Delivered To field is displayed below if it is in the system.

---

### **Delivery Feedback**

Click to enter feedback about the delivery.

See [Delivery Feedback Page](#).

### **Signature**

Click to open the signature area where you can capture and record a signature for the delivery.

See [Perform Delivery Page](#).

### **Options**

Click to access task flow options that were defined on the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page. Any changes applied to the Options page are temporary and only for the current session.

### **Filter (field and button) Filter (field and button)**

Use the Filter feature to limit your existing search results to rows that meet your criteria. This feature reduces the original search results to a smaller number of rows so that you can focus on your area of interest.

Click the Filter button to apply your filter value to the existing search results and display only the rows that match your filter.

The filter feature is also initiated when you tab out of the Filter field.

---

**Note:** The Filter feature is applied to the existing search results and does not perform another search on data within PeopleSoft.

---

### **Save**

Click to deliver the items that appear in the list at the bottom of this page. As part of saving the delivery, the current date, time, and user ID of the person performing the delivery are recorded in the delivery transaction history table. When the delivery is complete, the system displays the Delivery Saved page.

Click the OK button to return to the Select Items for Delivery page where you can search for another receipt.

If the Save Delivery Document check box is selected on the Installation Options - Mobile Inventory page, or the User Preferences - Mobile Inventory page for the task flow, then the Delivery Document field remains populated after clicking the Save button.

### **Return to Select Items**

Click to return to the Select Items for Delivery page where you can add more items to the delivery.

**Show icon (right arrow)**

Click Show icon to view additional details about a receipt distribution line. The details include the due date, specific location information, and the stocking unit of measure.

**Hide icon (down arrow)**

Click Hide icon to hide additional details about a receipt distribution line.

**Item ID**

Displays the item that was returned from the search. If you selected the Display Description check box, the description also appears with the item.

If the item is configured, the configuration code is displayed instead of the description. Also, if the item is a description-only item, such as not having an item ID, then the description is displayed, regardless of the display description option.

**Qty (quantity)**

Displays the distribution quantity and the supplier's unit of measure.

**Deliver To**

Displays the name in which the item should be delivered.

If the Attention To field is populated on the receipt distribution line, then this field is populated with the value in the Attention To field.

If the Attention To field is not populated on the receipt distribution line, then this field is populated with the value in the Requester field.

**Comments**

Click to view any purchase order or receipt comments associated with the receipt line. Comments exist when the icon is displayed.

**Delete**

Click to delete the current item from the delivery.

## Delivery Feedback Page


Use the Delivery Feedback table to provide delivery feedback

## Navigation

Click the Delivery Feedback link on the Delivery page

### Image: Delivery Feedback page

This example illustrates the fields and controls on the Delivery Feedback page. You can find definitions for the fields and controls later on this page.

| Mobile Inventory           |                        | Sign Out  |       |
|----------------------------|------------------------|---|-------|
| Delivery                   |                        |   |       |
| Delivered To               |                        | KENNETH SCHUMACHER  |       |
| ▾ Delivery Feedback        |                        |   |       |
| Code                       | <input type="text"/>   |  |       |
| Feedback                   | <input type="text"/>   |   |       |
| ▶ Signature<br>▶ Options   |                        |   |       |
| Filter                     | <input type="text"/>   | Filter  | Clear |
| Save                       | Return to Select Items |   |       |
| Item                       | Qty                    | Deliver To  |       |
| ▶ TEST SBI AND GLN         | 10<br>EA               | Kenneth Schumacher  | ✘     |
| ▶ JW_TEST_ITEM             | 11<br>EA               | Kenneth Schumacher  | ✘     |
| ▶ TEST                     | 100<br>EA              | Kenneth Schumacher  | ✘     |
| ▶ CGFLOT<br>CGF TEST       | 3<br>EA                | Kenneth Schumacher  | ✘     |
| ▶ CGFLOT<br>CGF TEST       | 13<br>EA               | Kenneth Schumacher  | ✘     |
| ▶ CGFSERIAL<br>TEST        | 12<br>EA               | Kenneth Schumacher  | ✘     |
| ▶ MT_SR1<br>TEST FOR SERIA | 10<br>BOX              | Kenneth Schumacher  | ✘     |
| ▶ SKY<br>TEST ITEM         | 96<br>EA               | Kenneth Schumacher  | ✘     |
| Save                       | Return to Select Items |   |       |

Use this section to provide information to the PeopleSoft system about the delivery of the receipt line.

**Delivery Feedback Code**

Select a code that automatically updates the Delivery Feedback field. Codes are defined in the PeopleSoft system Delivery Feedback component.

**Delivery Feedback**

If you selected a feedback code for the delivery, the text appears in this field. You can also enter additional comments that you have related to the delivery of the receipt line items.

After you deliver the item, the comments are recorded in the Delivery Feedback field in the Maintain Delivery Component in the PeopleSoft system. To view the comments, select Purchasing, Receipts, Maintain Delivery Information.

**Related Links**

"Understanding Delivery Information (*PeopleSoft FSCM 9.2: Purchasing*)"

**Perform Delivery Page**

Use the Perform Delivery page to add a signature to a delivery

**Navigation**

Mobile Inventory, Delivery. Click the Add to Delivery link on the Select Items for Delivery page, click the Perform Delivery link, and then click the Signature link.

---

**Note:** The signature capture only works with browsers that support HTML5.

---

Use the Signature area to capture a signature for the delivery. The signature is captured and stored as an attachment.

A signature is required if:

- The Delivery Signature Required check box is selected on the Installation Options - Mobile Inventory page.
- The Delivery Signature Required field is selected on the Installation Options - Mobile Inventory page, and the *Default to Installation value* option is selected in the Delivery Signature Required field on the Purchasing Definition - Business Unit Options page for the receiving business unit.
- The *Yes* option is selected in the Delivery Signature Required field on the Purchasing Definition - Business Unit Options page for the receiving business unit.

If a signature is required at the installation level, business unit level, or both and a user clicks the Save button on the Perform Delivery page without obtaining a signature, the application displays an error.

After a signature is entered, if the person performing the delivery tries to modify the delivery (such as returning to the Select Items page to add more items), then the application displays a warning asking the user to confirm the modification. If the user confirms that they want to modify the delivery, the signature is automatically cleared and will have to be entered after the modification.

After a signature is entered, and no modifications are needed, the user clicks the Save button to accept the signature and save the delivery. The signature is stored as a file attachment and displays on multiple PeopleSoft pages such as the: Deliver Location page and the Delivery Detail page.

**(signature area)**

The person accepting the delivery uses this area to enter their signature.

**Clear**

Click this button to clear a signature.

## **Perform Delivery: Attempt Feedback Page**

Use the Perform Delivery: Attempt Feedback page to record delivery attempts.

### Navigation

Mobile Inventory, Delivery. Click the Add to Delivery link on the Select Items for Delivery page, and then click the Attempt Delivery link.

### Image: Delivery: Attempt Feedback page

This example illustrates the fields and controls on the Delivery: Attempt Feedback page. You can find definitions for the fields and controls later on this page.

| Save Attempt               |           | Return to Select Items |   |
|----------------------------|-----------|------------------------|---|
| Item                       | Qty       | Deliver To             |   |
| ▶ TEST SBI AND GLN         | 10<br>EA  | Kenneth<br>Schumacher  | ✘ |
| ▶ JW_TEST_ITEM             | 11<br>EA  | Kenneth<br>Schumacher  | ✘ |
| ▶ TEST                     | 100<br>EA | Kenneth<br>Schumacher  | ✘ |
| ▶ CGFLOT<br>CGF TEST       | 3<br>EA   | Kenneth<br>Schumacher  | ✘ |
| ▶ CGFLOT<br>CGF TEST       | 13<br>EA  | Kenneth<br>Schumacher  | ✘ |
| ▶ CGFSERIAL<br>TEST        | 12<br>EA  | Kenneth<br>Schumacher  | ✘ |
| ▶ MT_SR1<br>TEST FOR SERIA | 10<br>BOX | Kenneth<br>Schumacher  | ✘ |
| ▶ SKY<br>TEST ITEM         | 96<br>EA  | Kenneth<br>Schumacher  | ✘ |

Use this page to record a delivery attempt. You can enter feedback indicating why you were not able to deliver the items.

The system records the date and time of the delivery attempt, the User ID performing the delivery attempt, and any feedback entered in the Feedback field.

|                     |   |
|---------------------|---|
| <b>Code</b>         | Select a code that automatically updates the Feedback field. Codes are defined in the PeopleSoft system Delivery Feedback component.  |
| <b>Feedback</b>     | If you selected a feedback code for the attempted delivery, the text appears in this field. You can also enter additional comments that you have related to the attempted delivery.<br><br>The Code field is not required to enter free-form text into the Feedback field.  |
| <b>Save Attempt</b> | Click to record the attempted delivery. When deliveries attempts are saved, the system displays a message indicating that the attempt is saved. Click the OK button to return to the Select Items for Delivery page.<br><br>Delivery attempts are saved to the delivery transaction history table with a transaction type of <i>Delivery Attempted</i> . Delivery attempts can be viewed on the Delivery Life Cycle page. |

---

## Viewing Delivery History

This section discusses how to:

- Review delivery information for a receipt.
- View the life cycle of a delivery.
- Review and maintain delivery information.

### Page Used to View Delivery History

| <b>Page Name</b>   | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>                               |
|--------------------|------------------------|--|--|
| Delivery Detail    | RECV_DEL_INQ_DTL       | Purchasing, Receipts, Review Receipt Information, Delivery Inquiry.  | Review delivery information for a receipt. |
| Life Cycle Inquiry | RECV_DEL_INQ_CYCLE     | Purchasing, Receipts, Review Receipt Information, Delivery Inquiry. From the Delivery Detail page, click the Delivery Life Cycle link. | View the life cycle of a delivery.         |
| Delivery Location  | RECV_DELIVERY1         | Purchasing, Receipts, Maintain Delivery Information  | Review and maintain delivery information.  |

### Delivery Detail Page

Use the Delivery Detail page (RECV\_DEL\_INQ\_DTL) to review delivery information for a receipt.

### Navigation

Purchasing, Receipts, Review Receipt Information, Delivery Inquiry.

### Image: Delivery Detail page

This example illustrates the fields and controls on the Delivery Detail page.

**Delivery Detail**

Unit: US001    Receipt No: WAB06R    Ship To:

**Receipt Lines**

|           |            |          |       |                   |           |
|-----------|------------|----------|-------|-------------------|-----------|
| Line:     | 3          | Item ID: | 10016 | TC8799 Cyclometer |           |
| Due Date: | 08/14/2011 | Ship To: | US001 | Distribution Qty: | 1.0000 EA |

**Delivery Information** Find | View All | First 1 of 1 Last

Delivered Flag    Date: 08/17/2011 7:49AM    Attention To: Duke Otoshi

Deliverer: Kenneth Schumacher    Delivered To: DUKE OTOSHI

Requester: Kenneth Schumacher    Delivery Cart ID: ANDY\_PM

Location: US001 USA - New York    Distribution Line: 1

Address 1: 144 North Street    Distribution Qty: 1.0000

Address 2:    Building #:    Floor #:

Address 3:    City: New York    Telephone:

Address 4:    County:    Extension:

Postal Code: 10168    State: NY    Fax:

Delivery Feedback:  [Delivery Life Cycle](#)

Delivery Signature:

See "Delivery Detail Page (*PeopleSoft FSCM 9.2: Purchasing*)".

## Life Cycle Inquiry Page

Use the Life Cycle Inquiry page (RECV\_DEL\_INQ\_CYCLE) to view the life cycle of a delivery.

### Navigation

Purchasing, Receipts, Review Receipt Information, Delivery Inquiry. From the Delivery Detail page, click the Delivery Life Cycle link.

### Image: Life Cycle Inquiry: Delivery Details page

This example illustrates the fields and controls on the Life Cycle Inquiry: Delivery Details page.

**Life Cycle Inquiry**

Business Unit: US001    Due Date: 07/11/2000

Receipt Number: 0000000001    Ship To: US001

Distribution: 1/1/1    Item ID: 10000    Long Sleeve Biking Jersey, Men's

Requester:    Location:

Delivery Status: Received    Distribution Qty: 20.0000 EA

**Delivery Life Cycle** Personalize | Find | First 1 of 1 Last

| Transaction | Source | Updated By     | Date Timestamp             | Delivery Feedback |
|-------------|--------|----------------|----------------------------|-------------------|
| 1 Received  | Online | Theresa Monroe | 07/11/00 11:03:36.000000AM |                   |

## Delivery Location Page

Use the Delivery Location page (RECV\_DELIVERY1) to review and maintain delivery information.

### Navigation

Purchasing, Receipts, Maintain Delivery Information

### Image: Delivery Location page

This example illustrates the fields and controls on the Delivery Location page. You can find definitions for the fields and controls later on this page.

### Delivered

If this check box is cleared, the system clears the Delivery Signature fields as well as other delivered fields.

See "Accessing Delivery Information (*PeopleSoft FSCM 9.2: Purchasing*)".

## Setting Up and Using Mobile Delivery Carts

This section provides an overview of how to add items to a delivery cart and discusses how to:

- Establish mobile delivery cart installation options.
- Establish mobile delivery cart user preferences.
- Define delivery carts.
- Search for delivery carts.
- Modify delivery cart options.
- Maintain delivery carts
- Add items to a delivery cart.

- View delivery cart comments.

## Pages Used to Set up and Use Mobile Delivery Carts

| <b>Page Name</b>                        | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>   |
|---|------------------------|---|--|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select the Delivery Cart task flow.  | Establish mobile delivery cart installation options. |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory. Select the Delivery Cart task flow.  | Establish mobile delivery cart user preferences.     |
| Setup Delivery Cart                     | DELIVERY_CART          | Set Up Financials/Supply Chain, Product Related, Mobile Inventory, Setup Delivery Cart  | Define delivery carts in PeopleSoft.                 |
| Delivery Cart: Search                   | (not applicable)       | Mobile Inventory, Delivery Cart.  | Search for delivery carts.                           |
| Delivery Cart - Options                 | (not applicable)       | Mobile Inventory, Delivery Cart. Click the Options link   | Modify delivery cart options.                        |
| Delivery Cart                           | (not applicable)       | Mobile Inventory, Delivery Cart   | Maintain delivery cart items.                        |
| Add Items                               | (not applicable)       | <p>Mobile Inventory, Delivery Cart. On the Delivery Cart: Search page, search for and select a cart. If items exist on the cart, click the Add Items link from the Delivery Cart page. If items do not exist on the cart, the system displays the Add Items page</p> <p>From the Delivery Cart page, use the Advanced Search, the Delivery Document, or both features to search for items to add to the delivery cart.</p> <p>From the Add Items page, search for a delivery document that contain the items that you want to add to the delivery cart.</p> | Add items to a delivery cart.                        |

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>                 |
|------------------|------------------------|---|------------------------------|
| Comments         | (not applicable)       | Mobile Inventory, Delivery Cart.<br><br>From the Add Items page or the Delivery Cart page, click the Comments icon. | View delivery cart comments. |

## How to Add Items to a Delivery Cart

These steps list the basic steps to add items to a delivery cart:

1. Log into your PeopleSoft Mobile Inventory application.
2. From the Mobile Inventory main menu, select Delivery Cart.
3. From the Delivery Cart: Search page, verify or enter the business unit to which you want to access.
4. In the Delivery Cart field, you can enter a cart ID and tab out of the field, or click the Search button.

Alternatively, you can click the lookup icon to search for an active cart ID. Or, you can leave the Delivery Cart field blank and click the Search button.

5. (Optional) If you'd like to change your Delivery Cart options, click the Options link to access the Delivery Cart: Options page.

Any changes applied to this page are temporary and only for the current session.

6. From the Delivery Cart: Search Results page, select a cart.

---

**Note:** If there are no items on the cart, then the mobile application takes you to the Add Items: Search page.

---

7. From the Delivery Cart page, click the Add Items link.
8. From the Add Items: Search page, you can:
  - Enter a value in the Delivery Document field and tab out of the field or click the Search button.

This option returns all items that are associated with the delivery document and takes you to the Add Items page where the items are selected.

- Click the Advanced Search link to search for items to add to the cart and then click the Search button.

This option enables you to search on multiple fields such as Receipt, Item, Receipt Date, and so on.

9. From the Add Items page, where the items are automatically selected, click the Add to Cart button.

The system takes you to the Add Items: Search page where the View Cart link is updated with the added items.

10. From the Add Items: Search page, click the View Cart link to access the Delivery Cart page.
11. From the Delivery Cart page, click the Save button to save the added items to the cart.

The system displays a confirmation message. When you see this message, click the OK button. The system returns to the Delivery Cart: Search page.

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to establish mobile delivery cart installation options.

### Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select the Delivery Cart task flow.

### Image: Installation Options - Mobile Inventory: Delivery Cart task flow page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Delivery Cart task flow page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It is divided into two main sections: 'System Options' and 'Task Options'.

**System Options:**

- Key Concatenation Separator: \
- Role Name: MIN User
- Delivery Signature Required

**Task Options:**

- Task Flow: Delivery Cart
- Rows Displayed: 10
- Display Lookups
- Display Description
- Display Filter Related Fields
- Display Show/Hide in tables
- Auto Add Search Results
- Save Delivery Document
- Add Items Sort By: Item ID
- Delivery Cart Sort By: Item ID
- Filter All Alternate Items

Navigation links: Find | View All | First | 10 of 15 | Last

Use this page to define default values for Mobile Delivery Cart page defaults on a mobile device.

### Rows Displayed

Enter the maximum number of rows that you want to display in the tables for the Mobile Delivery Cart task flow.

### Display Lookups

Select this check box to display the Lookup icon for all the search fields on Delivery Cart pages on the mobile device. The Lookup icon enables you to view a list of options and select one.

### Display Description

Select to display the item descriptions on the Delivery Cart pages on the mobile device.

---

**Note:** The system ignores this setting when an item is a description only item.

---

**Display Filter Related Fields**

Select to display the Filter field and Filter and Clear buttons on Mobile Delivery Cart pages. Deselect the check box to remove the filter functionality from the pages.

**Display Show/Hide in tables**

Select to display the Hide and Show links or icons on Delivery Cart pages. You can expand and collapse additional item information sections using the links.

**Auto Add Search Results**

Select to indicate that when a search is performed for the task flow, then all matching receipt distribution lines are automatically added to the delivery.

**Save Delivery Document**

Select to indicate that the Delivery Document field is to remain populated after items are added to a delivery cart.

**Add Items Sort By**

Select how you want to define the ascending order in which items and locations are sorted on the Add to Cart page in the Mobile Delivery Cart task flow.

Valid values include:

- *Item ID*: Select to sort items and locations by item ID.
- *Deliver To*: Select to sort items and locations by the value in the Deliver To field.

**Delivery Cart Sort By**

Select how you want to define the ascending order in which items and locations are sorted on the Delivery Cart page in the Mobile Delivery Cart task flow.

Valid values include:

- *Item ID*: Select to sort items and locations by item ID.
- *Deliver To*: Select to sort items and locations by the value in the Deliver To field.

**Filter All Alternate Items**

Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID that matches the alternate is shown in the table.

Deselect to indicate that only the item ID is to be used for filtering, which also improves system performance.

## User Preferences - Mobile Inventory Page

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to establish mobile delivery cart user preferences.

**Navigation**

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory. Select the Delivery Cart task flow.

This page uses the same values as the corresponding Installation Options - Mobile Delivery page for the Delivery Cart task flow. When you are setting up user preferences, you can select the Use Installation Values check box to use installation values instead of defining user preferences. When you select this check box, user preferences values are not longer available.

## Setup Delivery Cart Page

Use the Setup Delivery Cart page (DELIVERY\_CART) to define delivery carts in PeopleSoft.

### Navigation

Set Up Financials/Supply Chain, Product Related, Mobile Inventory, Setup Delivery Cart

### Image: Setup Delivery Cart page

This example illustrates the fields and controls on the Setup Delivery Cart page. You can find definitions for the fields and controls later on this page.

Use this page to define delivery carts for your mobile device. You must setup this page before accessing the delivery cart on your mobile device.

### Status

Select a status of *Active* or *Inactive*. Active carts can be used with a mobile device. Inactive carts do not appear on mobile devices.

When setting up a new delivery care, this field automatically defaults to *Active*.

### Cart Owner

Select the User ID of the individual who owns the cart. This field defaults to the user who is signed into the system.

## Delivery Cart: Search Page

Use the Delivery Cart: Search page (not applicable) to search for delivery carts.

## Navigation

Mobile Inventory, Delivery Cart.

### Image: Delivery Cart: Search page

This example illustrates the fields and controls on the Delivery Cart: Search page. You can find definitions for the fields and controls later on this page.

Use this page to search for active delivery carts.

The behavior of the application depends on whether receipt distribution lines exist for the delivery cart:

- If receipts distribution lines exist for the delivery cart, then the mobile application:
  - Displays the Delivery Cart page.
  - Lists all receipt distribution lines that exist and have not been delivered.
- If receipt distribution lines do not exist for the delivery cart, then the mobile application displays the Add Items page.

### Delivery Cart

Enter an active delivery cart on which to base the search. Then, tab out of the field or click the Search button to display a list of carts that match your search criteria. If you leave this field blank and click the Search button, then the system returns all delivery carts for the business unit.

### Search

Click this button to search for active delivery carts that match the criteria that you enter. The system displays the matching carts. The search is also initiated when you tab out of the Delivery Cart field.

## Delivery Cart - Options Page

Use the Delivery Cart - Options page (not applicable) to modify delivery cart options.

**Navigation**

Mobile Inventory, Delivery Cart. Click the Options link

**Image: Delivery Cart: Options page**

This example illustrates the fields and controls on the Delivery Cart: Options page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Delivery Cart: Options' page in the Mobile Inventory application. At the top, there is a navigation bar with a red 'O' icon, the text 'Mobile Inventory', and a 'Sign Out' button. Below this, the page title 'Delivery Cart' is centered. There are two search fields: 'Unit' with the value 'US001' and 'Delivery Cart' with the value 'CART1', each with a magnifying glass icon. A 'Search' button is located to the right of the 'Delivery Cart' field. Below these fields is a section titled 'Options' with a dropdown arrow. This section contains several settings: 'Rows To Display' is a text input with '10'; 'Delivery Cart Sort By' and 'Add Items Sort By' are dropdown menus both set to 'Item ID'; and a list of seven checkboxes: 'Display Description', 'Display Show/Hide in tables', 'Display Filter', 'Display Lookups', 'Auto Add Search Results', 'Save Delivery Document', and 'Filter All Alternate Items'. At the bottom of the page is a 'Search Results' section with a table. The table has two columns: 'Delivery Cart' and 'Description'. The first row contains the values 'CART1' and 'Cart 1', both of which are underlined and appear to be hyperlinks.

Use this page to change processing and display options for delivery carts. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page and most fields can be changed for this session.

**Filter All Alternate Items**

Displays the option selected on the Installation Options – Mobile Inventory page or the User Preferences – Mobile Inventory page.

If this option is selected, then the system searches through all possible alternate item identifiers when filtering a table. If an

alternate item identifier is entered in the Filter field, then the item ID that matches the alternate is displayed in the table.

If this option is not selected, then alternate item identifiers cannot be used to filter the table.

For more information about the definition of each field:

See [Installation Options - Mobile Inventory Page](#).

## **Delivery Cart Page**

Use the Delivery Cart page (not applicable) to maintain delivery cart items.

**Navigation**

Mobile Inventory, Delivery Cart

**Image: Delivery Cart page**

This example illustrates the fields and controls on the Delivery Cart page. You can find definitions for the fields and controls later on this page.

**Mobile Inventory** **Sign Out**

**Delivery Cart (ANDY\_PM)**

Options

Filter

[Add Items](#)

[Return to Search](#)

| Item   | Qty     | Deliver To         |  |  |
|--|---------|--------------------|--|--|
| 10016<br>TC8799 Cyclometer   | 1<br>EA | Duke Otoshi        |  |  |
| <b>Receipt WAB06R</b><br><b>Distrib 3\1\1</b><br><b>Requester Kenneth Schumacher</b><br><b>Due Date 08/14/2011</b><br><b>Stock UOM EA</b><br><b>Ship To US001</b><br>USA - New York<br><b>Location US001</b><br>USA - New York |         |                    |  |  |
| 10024<br>Stainless Steel Padlock   | 1<br>EA | Duke Otoshi        |  |  |
| C0002<br>Portable Stove  | 1<br>EA | Kenneth Schumacher |  |  |
| C0002<br>Portable Stove  | 1<br>EA | Kenneth Schumacher |  |  |

[Add Items](#)

[Return to Search](#)

Use this page to maintain delivery carts such as deleting items from the cart.

This page is displayed after selecting a cart from the Delivery Cart: Search page and receipts distribution lines exist for the delivery cart.

**Filter (field)**

Enter a value by which to filter items on the cart. You can filter by the Item ID, Manufacturer Item ID, Supplier Item ID, and Delivery To fields. You can enter complete or a partial value. This field is not case sensitive.

**Filter (button)**

Click to filter the list based on the value entered in the Filter field.

**Clear**

Click to remove the effects of the filter. Or, you can delete the filtering criteria from the Filter field and tab out of the field.

**Comments**

Click to view any purchase order or receipt comments associated with the receipt line. Comments exist when the icon appears.

**Delete**

Click to remove one item from the cart.

**Delete All**

Click to remove all items from the cart.

**Add Items**

Click to access the Add Items page where you can add items by delivery document or search for items to add to the cart.

**Save**

Click to save item modifications to a cart. When item modifications are saved, the system displays a message indicating that the cart is saved. Click the OK button to return to the Delivery Cart: Search page.

After adding items to a cart, you must return to this page and click the Save button to save the items to the cart.

A transaction is written to the delivery transaction history table:

- If items are added to a delivery cart, then the transaction type is *Added to Delivery Cart*, and can be viewed on the Life Cycle Inquiry page.
- If items are removed from a delivery cart, then the transaction type is *Removed from Delivery Cart*, and can be viewed on the Life Cycle Inquiry page.

If the Save Delivery Document check box is selected on the Installation Options - Mobile Inventory page, or the User Preferences - Mobile Inventory page. for the task flow, then the Delivery Document field remains populated after items are added to the delivery cart.

**Return to Search**

Click to access the Delivery Cart: Search page if returning from the cart saved confirmation message, or to access the Delivery Cart: Search Results page if returning from the Delivery Cart page.

## Add Items Page

Use the Add Items page (not applicable) to add items to a delivery cart.

### Navigation

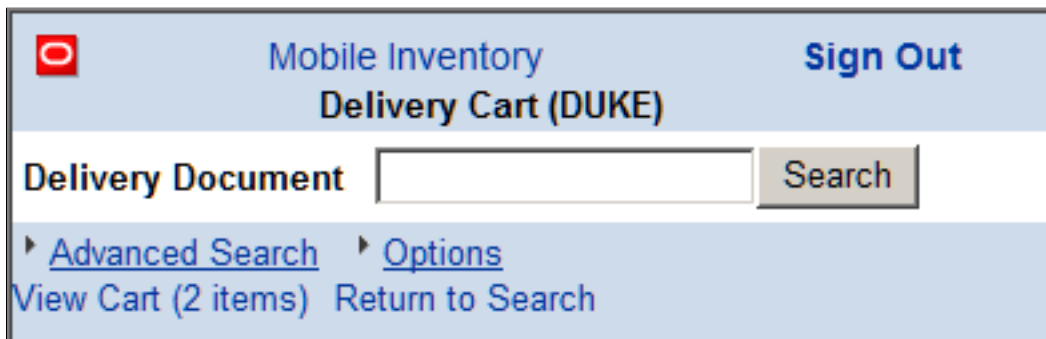
Mobile Inventory, Delivery Cart. On the Delivery Cart: Search page, search for and select a cart. If items exist on the cart, click the Add Items link from the Delivery Cart page. If items do not exist on the cart, the system displays the Add Items page

From the Delivery Cart page, use the Advanced Search, the Delivery Document, or both features to search for items to add to the delivery cart.

From the Add Items page, search for a delivery document that contain the items that you want to add to the delivery cart.

### Image: Add Items page (no items selected)

This example illustrates the fields and controls on the Add Items page (no items selected). You can find definitions for the fields and controls later on this page.



Use this page to search for items to add to a delivery cart.

### Delivery Cart

Displays the cart in which you selected from the Delivery Cart: Search page.

### Delivery Document

Enter or scan a bar code for a delivery document on which to base the search. Then tab out of the field or click the Search button.

The document can be a receipt number, purchase order number, or a pro number such as a tracking number. Receipt or purchase order numbers can be entered without leading zeros. For example, to find receipt number 000000115, you can enter 115.

If the Auto Add Search Results check box is selected on the Delivery Cart: Options page, the system adds all receipt distribution lines from receipts that have a status other than *Closed* or *Cancelled*, match the selection criteria, and are not assigned to another delivery cart.

If the Save Delivery Document check box is selected on the Installation Options - Mobile Inventory page, or the User Preferences - Mobile Inventory page. for the task flow, then this

field remains populated after items are added to the delivery cart.

### Advanced Search

Click to enter advanced search criteria for receipt lines. For example, you can define specific item ID's, receipts dates, and requesters. This page works the same as the advanced search feature for Mobile Inventory Deliveries.

### Options

Click to access the Delivery Cart: Options page.

See [Delivery Cart - Options Page](#).

### View Cart

Select to view items that exist on a cart. The number in parenthesis indicates the number of items that exist on the cart. This link is not displays if no items exist on the cart.

### Return to Search

Click to return to the Delivery Cart: Search page, that displays the Search Results.

After you have searched for items to add to a delivery cart, the Add Items page displays the results:

### Image: Add Items page (items selected)

This example illustrates the fields and controls on the Add Items page (items selected). You can find definitions for the fields and controls later on this page.

| Sel                                 | Item                           | Qty        | Deliver To         |
|-------------------------------------|--------------------------------|------------|--------------------|
| <input checked="" type="checkbox"/> | 10042<br>Single Outdoor Cooker | 2400<br>EA | Kenneth Schumacher |

Use this page to select the items that you want to add to the cart.

### Filter (field)

Enter a value by which to filter receipt distribution lines. You can filter by item ID, manufacturer item ID, supplier item ID, item description, delivery document, deliver to, attention to, or location fields. You can enter a complete or a partial value. The Filter field is not case sensitive.

**Filter (button)**

Click to filter the list based on the Filter field value.

**Clear**

Click to remove the effects of the filter. Or, you can delete the filtering criteria from the Filter field and tab out of the field.

**Expand (right arrow)**

Click to display additional item information.

**Collapse (down arrow)**

Click to close the additional item information.

**Sel (select)**

Select to choose an item to add to the delivery. The default value is selected. When you click the Add to Cart button, the system disables the Sel check box.

**(select all)**

Click to select all of the items in the list. The system adds all selected items to the cart when you click the Add to Cart button.

**(deselect all)**

Click to deselect all of the items in the list.

**Add to Cart**

Click this button to add selected items to the cart and update the View Cart link to reflect the number of items on the delivery cart.

---

**Important!** This does not save the items to the cart.

---

To save items to a cart, you must click the View Cart link, which displays the Deliver Cart page. On the Delivery Cart page, you must click the Save button to save the items to the cart.

## Comments Page

Use the Comments page (not applicable) to view delivery cart comments.

## Navigation

Mobile Inventory, Delivery Cart.

From the Add Items page or the Delivery Cart page, click the Comments icon.

### Image: Delivery Cart: Comments page

This example illustrates the fields and controls on the Delivery Cart: Comments page.

| Mobile Inventory       |                        | Sign Out |
|------------------------|------------------------|----------|
| <b>Comments</b>        |                        |          |
| <b>US001\WAB06R\3</b>  |                        |          |
| <b>Item</b>            | 10016                  |          |
|                        | TC8799 Cyclometer      |          |
| <b>Quantity</b>        | 1 EA                   |          |
| <b>Deliver To</b>      | Duke Otoshi            |          |
| <b>Comments</b>        |                        |          |
|                        | Deliver to Duke's cube |          |
|                        | Duke's bike computer   |          |
| <a href="#">Return</a> |                        |          |

Use this page to view comments for receipt distribution lines that has:

- Purchase order line comments where the Show at Receipt check box is selected on the PO Line Comments page.
- Receipt line comments.

When you select an item for which to review comments, the system displays the item information, quantities to be delivered, and the name in the Deliver To field.

If a configuration code exists, then the system displays the configuration code instead of the item description.

If the Display Description check box is not selected on the Options page, then the item description is not displayed.

If there is no item ID, then the description is displayed, regardless of the option selected for the Display Description check box.

Click the Return link to navigate to the previous page.

## Printing a Delivery Report

This section discusses how to print a delivery report.

### Page Used to Print a Delivery Report

| Page Name        | Definition Name | Navigation                                      | Usage                    |
|------------------|-----------------|---|--------------------------|
| Receipt Delivery | RUN_POY5030     | Purchasing, Receipts, Reports, Receipt Delivery | Print a delivery report. |

### Receipt Delivery Page

Use the Receipt Delivery page (RUN\_POY5030) to print a delivery report.

#### Navigation

Purchasing, Receipts, Reports, Receipt Delivery

#### Image: Receipt Delivery page

This example illustrates the fields and controls on the Receipt Delivery page.

The screenshot shows the 'Receipt Delivery' page interface. At the top, there is a title 'Receipt Delivery' and a 'Run' button. Below the title, there are several controls: 'Run Control ID' set to 'RECV-DLY-DVP1', 'Report Manager' and 'Process Monitor' links, and a 'Language' dropdown menu set to 'English'. A section titled 'Report Request Parameters' contains several input fields: 'Business Unit' with the value 'US001', 'Receipt No' with the value 'SBIPOREC', 'Location', 'From Date', and 'Through Date'.

Use this page to create a Receipt Delivery Detail Report (POY5030 for a BI Publisher report).



## Chapter 7

# Counting Par Locations Using a Mobile Device

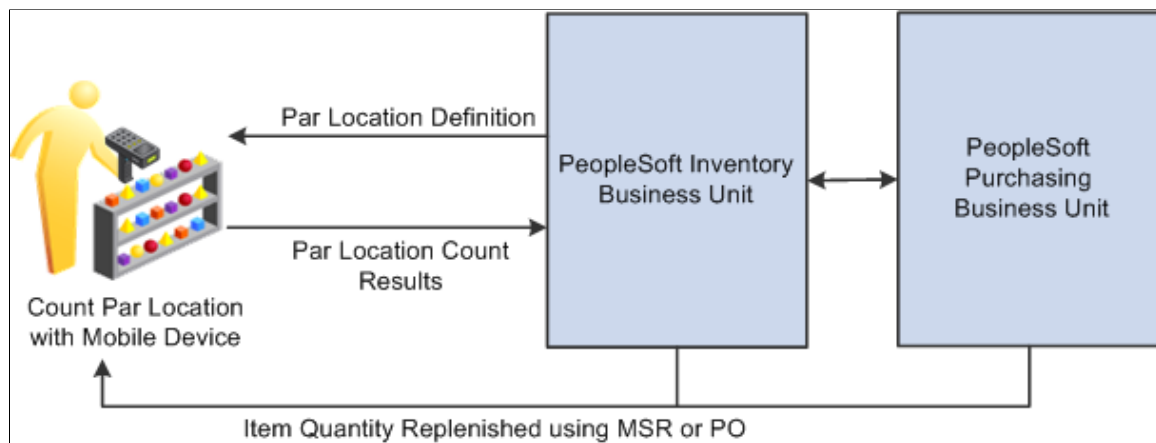
## Understanding Mobile Par Location Counts

The par location functions in PeopleSoft Inventory enable you to establish stock locations that can be replenished without tracking item on-hand quantities and material movement transactions. The par locations might be stockrooms in a warehouse or on a hospital floor, supply closets, exchange carts, moving carts that contain items, automated point-of-service dispensing machines, or trucks that are equipped with the supplies for handling service calls. You can use mobile devices to conduct periodic inventory counts to determine replenishment needs for each par location.

The following diagram illustrates the par location counting process when using mobile devices and PeopleSoft Mobile Inventory Management:

**Image: The process flow for counting the stock in a par location using a mobile device**

This example illustrates the process flow for counting the stock in a par location using a mobile device.



The sequence of events in the par location count using PeopleSoft Mobile Inventory Management is:

1. The par locations should be defined in the PeopleSoft Inventory business unit including the items in each par location, the optimal quantity for each item, and how each item should be replenished.
2. Use your mobile devices to count the par locations.

Based on your setup for the par location in PeopleSoft Inventory, you can:

- a. Enter the current item quantity in the par location (count quantity) or enter the quantity needed in the par location (requested quantity).
- b. Count just the items that you choose or those items that are required to be counted.

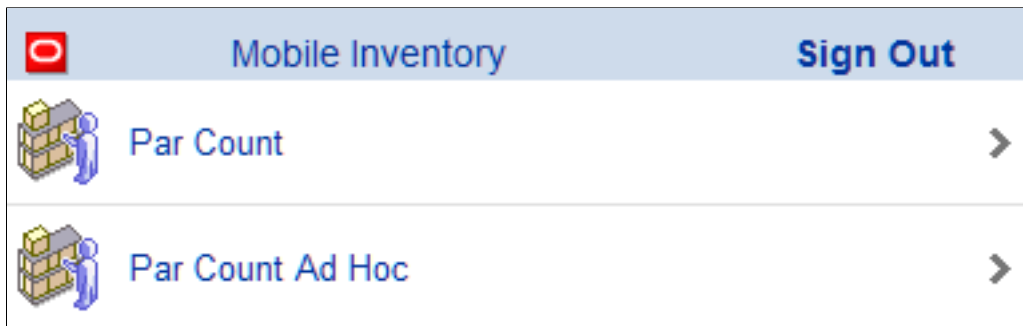
- c. Accept or adjust an estimated count quantity that can be displayed to save input steps or conduct a blind count by entering each item quantity in a blank field. The default count quantity is calculated by the Calculate Average Usage process in PeopleSoft Inventory.
3. In PeopleSoft Inventory, run the Create Par Replenishment Requests process to generate orders for items that fall below optimal quantity levels. Based on your par location setup, this process replenishes the par locations using material stock requests, requisitions, or purchase orders.

See "Understanding Par Location Management (*PeopleSoft FSCM 9.2: Inventory*)".

PeopleSoft Mobile Inventory provides two separate task flows to enter count quantities for par locations as shown in the next example:

### Image: Par Count task flows

This example illustrates the controls on the Par Count task flows.



Par count task flows include:

- The Par Count task flow that enforces the Count Required check box for each item within the par location. If it is necessary to count all required items in the par location, then use the Par Count task flow. The Count Required check box is defined for each item on the Define Par Location - Line page in PeopleSoft Inventory (Inventory, Replenish Par Locations, Define Par Location, Line). If the Count Required check box is selected, then you must enter a value in the Qty field for this item or an error occurs when you save this page.
- The Par Count Ad Hoc task flow that does not use the Count Required check box. It is used only for informational purposes. The Par Count Ad Hoc task flow enables you to count one or more items within a par location without counting all required items in the location.

Both task flows options display the same input screen.

To count par locations using the Par Count page and a mobile device:

1. On the PeopleSoft Mobile Inventory main menu, select the Par Count task flow or the Par Count Ad Hoc task flow.
2. On the Par Count page or the Par Count Ad Hoc, verify the Unit field is the correct inventory business unit.
3. Scan or enter the par location in the Location field.
4. Click the Fetch button or tab out of the Location field.

5. Enter the item quantities in the Qty column.
6. Click the Save button.

## Additional Fields Available for Mobile Par Location Counts

The following fields from the PeopleSoft Inventory system can be displayed on the par count pages on the mobile device if you customize your display. The fields are shown with the pages on which they appear in the PeopleSoft system and are provided through the web service.

- The par location group defined on the par location (Define Par Location - Header page).
- The item's count order and optimal quantity within the par location (Define Par Location - Line page).
- The compartment ID where the item is located within the par location (Define Par Location - Line page).
- The item's average usage within the par location (Define Par Location - Line Details page).
- The count status of the par location count ID (the header level of the Count Par Location Levels page).
- The Sufficient Stock, Last User ID, and Last Changed fields of the par location count ID (the line level of the Count Par Location Levels page).

---

## Common Elements Used to Understand Mobile Par Location Counts

### Alternate Item Display

Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: *Alternate Only*, *Alternate as Primary*, *Item Only*, and *Item as Primary*.

See [Setting Up Alternative Item Identifiers](#).

### All Item Filter

Select a value to define how you want the mobile device to display items.

Values include:

- *Display All*: Select to include all items in a filtered search.
- *Display Counted Only*: Select to display only those items that have been counted when you perform a filtered search for items.
- *Display Uncounted Only*: Select to display only those items that have not been counted when you perform a filtered search.

### Count Status to Include

Use this section to define which count statuses will be included in the mobile count pages. The system provides these values as

default values on mobile devices. You can override the default values using a mobile device.

Count statuses include:

- *New*: Select to return the detail lines in a non-blind, system-defined counting event for which you have not run the Counting Sheet process.
- *Counting*: Select to return the detail lines in a blind system-defined counting event.
- *Quantity Entered – Hold*: Select to return counting event detail lines with statuses that you changed manually on the Item Counts page to prevent the Stock Quantity Update process from updating the stock quantity of an item.
- *Ready to Update Stock Quantity*: Select to return counting event detail lines with quantities that are to be used to update the system tables when you run the Stock Quantity Update process.

|  |   |
|--|---|
| <b>Count UOM Enabled (count unit of measure enabled)</b> | Select to set mobile device pages to enable an item's count unit of measure. You can change the value using the Options link on Inventory Count pages   |
| <b>Delivery Signature Required</b>                       | Select to indicate that the mobile application requires a signature of the person receiving a delivery. When this option is selected, the Perform Delivery page requires a signature prior to saving the page.<br><br>See <a href="#">Perform Delivery Page</a> .   |
| <b>Display Description</b>                               | Select to display the item descriptions on the count pages on the mobile device.  |
| <b>Display Filter Related Fields</b>                     | Select to display the Filter field and Filter button on the Mobile Inventory Management count pages. Deselect the check box to remove the filter functionality from the pages.  |
| <b>Display Prior Entry Caption</b>                       | Select to display the last item counted for the current mobile count page. When selected, the system displays the Last Item Counted table. When you count an item, the table is updated with that item. The table displays one item at a time. As you add to the count, only the most recent item appears |
| <b>Display Lookups</b>                                   | Select to display the Lookup icon for the business unit and item fields at the top of Mobile Inventory count page on the mobile device. The Lookup icon enables you to view a list of options and select one.   |
| <b>Display Show/Hide in tables</b>                       | Select to display the Show and Hide menu options in count item lists for Mobile Count pages. The options make it possible for   |

you to expand and collapse item description sections in count pages.

### **Filter All Alternate Items**

Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID ( MASTER\_ITEM\_TBL) that matches the alternate is shown in the table.

Deselect to indicate that only the item ID is to be used for filtering, which also improves system performance.

### **Group**

A distinct set of event detail line items. You can divide a counting event into groups in the PeopleSoft system so that multiple users can simultaneously update the same counting event using the Mobile Inventory Management count applications.

You can divide the event based on item IDs or storage locations using a certain number of groups or a certain number of items or locations for each group.

### **Group by**

Select how you want to group items on the mobile device. This will group like items and locations on the display all page. The groups are displayed in the page navigation. The Group by field is not enabled for counts by location and counts by item

Values include:

- *Group by Item:* Select to sort groups by item.
- *Group by Location:* Select to sort groups by location.
- *No Grouping:* Select to not sort groups.

### **Initial Display Mode**

Select to define the initial display setting for mobile count pages. The system provides these values as default values on mobile devices. You can override the default values using a mobile device. This value is only applicable to guided counts.

Initial display values include:

- *Single Item:* Select to initially display count pages with a single item.
- *All Items:* Select to initially display count pages with all items in the search. You can then scroll the list using the Next and Previous buttons.

### **Pre-Load Serial IDs**

Select to preload serial IDs for Mobile Count pages. This setting is for event detail line items that are serial-controlled items. This check box is not available for manual counts.

### **Rows Displayed**

Enter the maximum number of items to display in the tables for the Mobile Inventory Management count pages. When there

are more rows of data than the value you enter, you can scroll through additional rows by using the Next link on the Mobile Inventory Management count pages. You can also change the number of rows displayed using mobile devices.

### Sort By

Select to define the initial display setting for mobile count pages when you are displaying all items. The system provides these values as default values on mobile devices. You can override the default values using a mobile device.

Sort option values include:

- *Sort By Item*: Select to display count pages for an item or items, depending on the value that you selected in the Initial Display Mode field. This value is not available for counts by item that already have been grouped by item.
- *Sort By Location*: Select to display items on count pages sorted by storage location. This value is not available for counts by location that have already been grouped by location.
- *Sort By Order Entered*: Select to display items on count pages sorted by the order in which the item was added to the count. New items are placed at the end.

### Task Flow

Identifies the Mobile Inventory Management task flow that uses the settings on this page. When you select a task flow, you can then use the lower portion of the Mobile Inventory Installation Options page to define default values and search and display options. Mobile devices use the information defined for the task flow as default values. Select a value to define installation-level options for these tasks:

- *Guided Count*: This count is when you are provided a list of items and locations to be counted, one by one, and count each one in the order that it is provided.
- *Count by Location*: This count is when you are provided a unique list of item locations that exist in the count, and then you manually enter the item and their counts for each location.
- *Count by Item*: This count is when you are provided a unique list of items that exist in the count, and then you manually enter the location and their counts for each item.
- *Manual Count*: This count is when items are counted manually. The count creates a manual cycle counting event for count quantity data loaded from an electronic data collection device or entered using the Manual Counting Entry page. Because the manual counting event is restricted to the specified items, selecting this option makes the Zero

Qty Count Options (zero quantity count options) field unnecessary and unavailable for entry.

If task flows already exist for user preferences and installation options, use the Show previous Row and Show Next Row buttons to locate the type of count you want to maintain. If you are adding task flow setting, select the task flow from the Task Flow field list of values.

---

## Defining Installation Options and User Preferences for Mobile Par Location Counts

Within PeopleSoft Inventory, you define parameters to determine how PeopleSoft Mobile Inventory Management performs on mobile devices. These parameters include settings and default values defined at an installation level and a user ID level. The following PeopleSoft pages are used to define parameters for the par counts on a mobile device.

This section discusses how to:

- Define installation options for par counts.
- Define user preferences for par counts.

## Pages Used to Define Installation Options and User Preferences for Mobile Par Location Counts

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---|------------------------|---|---|
| Setup Component Interfaces              | MIN_CMPINTFC           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Component Interfaces                       | Define the component interface for the Par Count mobile page and the Par Count Ad Hoc mobile page.  |
| Setup Mobile Services                   | MIN_SERVICES           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Mobile Services                            | Identify and setup the PeopleSoft Integration Broker services to be used with the Par Count mobile page and the Par Count Ad Hoc mobile page.   |
| Installation Options – Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain. Install, Installation Options, Mobile Inventory, and select the Par Count task flow | At the system level, define options to determine what features are available on the mobile devices and how the mobile page should appear.<br>For the par count pages, use the value of <i>Par Count</i> in the Task Flow field. |

| <b>Page Name</b>                              | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|---|------------------------|--|---|
| User Preferences – Mobile Inventory           | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Mobile Inventory, and select the <i>Par Count</i> task flow | For the individual user, define options to determine what features are available on the mobile devices and how the mobile page should appear. This page is optional; the Mobile Inventory Installation page is used when a user ID does not have this page defined or when the Use Installation Values check box is selected. |
| Define User Preferences - Overall Preferences | OPR_DEF_TABLE_FS1      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Overall Preferences   | Create par locations to be used by the Par Count page in PeopleSoft Mobile Inventory Management. In addition, this page defines the default value for the Default Quantity Option (count quantity or request quantity) in the Options table of the mobile Par Count page.   |
| Define Par Location - Header                  | CART_HEADER_INV        | Inventory, Replenish Par Locations, Define Par Location  | Create par locations to be used by the Par Count page in PeopleSoft Mobile Inventory Management. In addition, this page defines the default value for the Default Quantity Option (count quantity or request quantity) in the Options table of the mobile Par Count page.   |
| Define Par Location - Line                    | CART_REPLEN_OPT        | Inventory, Replenish Par Locations, Define Par Location, Line  | Identify each item located in a par location. Settings for each item that are displayed in the mobile device include unit of measure and the Count Required check box.<br><br>The Count Required check box is not used in the Par Count Ad Hoc task flow.   |
| Define Par Location - Line Details            | CART_TEMPLATE_INV      | Inventory, Replenish Par Locations, Define Par Location, Line Details  | Displays the average usage quantity for each item in the par location. This value can be displayed in the Par Count page and the Par Count by Item page.  |

| Page Name               | Definition Name    | Navigation  | Usage   |
|-------------------------|--------------------|---|---|
| Calculate Average Usage | CART_USAGE_REQ_INV | Inventory, Replenish Par Locations, Calculate Average Usage | This process calculates the average usage for items in a par location. The average usage quantity can be displayed on the mobile device by default or by clicking the Use Average button on the Par Count page. |

## Installation Options – Mobile Inventory Page

Use the Installation Options – Mobile Inventory page (INSTALLATION\_MIN) to at the system level, define options to determine what features are available on the mobile devices and how the mobile page should appear.

For the par count pages, use the value of Par Count in the Task Flow field.

### Navigation

Set Up Financials/Supply Chain. Install, Installation Options, Mobile Inventory, and select the Par Count task flow

### Image: Installation Options - Mobile Inventory page for the Par Count task flow

This example illustrates the fields and controls on the Installation Options - Mobile Inventory page for the Par Count task flow. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It has two tabs: 'Installation Options' and 'Mobile Inventory'. The 'Mobile Inventory' tab is active. The page is divided into two main sections: 'System Options' and 'Task Options'.  
**System Options:**  
 - Key Concatenation Separator: [ ]  
 - Role Name: [ MIN User ]  
 -  Delivery Signature Required  
**Task Options:** (with 'Find | View All' links)  
 - \*Task Flow: [ Par Count ]  
 - Rows Displayed: [ 10 ]  
 - \*Initial Display Mode: [ Single Item ]  
 - Alternate Item Display: [ Item as Primary ]  
 -  Expert Mode  
 -  Display Lookups  
 -  Display Description  
 -  Collapse Header  
 -  Display Filter Related Fields  
 -  Display Prior Entry Caption  
 -  Display Show/Hide in tables  
 -  Suppress Unique Compartments  
 -  Filter All Alternate Items  
 -  Allow Interim Save

The installation options defined on this page apply to the Par Count and Par Count Ad Hoc task flows. If needed, you can change these default settings on the mobile device.

|                               |   |
|-------------------------------|---|
| <b>Task Flow</b>              | Identifies the Mobile Inventory Management task flow that uses the settings on this page. Enter the value of <i>Par Count</i> to define installation-level options for the Par Count and Par Count Ad Hoc pages for mobile devices  |
| <b>Rows Displayed</b>         | Enter the maximum number of items to display on the Par Count page. You can scroll through additional rows of data on Par Count pages by using the Next link.   |
| <b>Initial Display Mode</b>   | Select to define the initial display setting for par count pages.<br><br>Initial display values include: <ul style="list-style-type: none"> <li>• <i>All Items</i>: Select to initially display par count pages with all items in the search. You can then scroll the list using the Next and Previous buttons.</li> <li>• <i>Single Item</i>: Select to initially display par count pages with a single item.</li> </ul>   |
| <b>Alternate Item Display</b> | Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: Alternate Only, Alternate as Primary, Item Only, and Item as Primary.<br><br>For more information about alternate items:<br><br>See <a href="#">Setting Up Alternative Item Identifiers</a> .  |
| <b>Expert Mode</b>            | Select to enable users to have quick access to data and quicker data entry. By not displaying certain fields, the system has to perform minimal page updates resulting in faster processing.<br><br>Values that are not displayed when entering item data include the item description, unit of measure, search prompts for items and compartments. The system does not verify the item and compartment until you click the Count button. The purpose of this mode is to enable you quick data entry with minimal page updates. |
| <b>Display Lookups</b>        | Select to display the Lookup icon for the Business Unit and Location fields on the Par Count and Par Count Ad Hoc mobile pages. The Lookup icon enables you to view a list of values and select one.  |
| <b>Display Description</b>    | Select to display the item descriptions on par count and par count ad hoc pages on a mobile device.   |
| <b>Collapse Header</b>        | Select to indicate that the header should be collapsed after you fetch the initial values. The header is initially expanded on the Par Count and Par Count Ad Hoc pages.  |

|                                      |   |
|--------------------------------------|---|
| <b>Display Filter Related Fields</b> | Select this check box to display the Filter field and Filter button on the Par Count and Par Count Ad Hoc pages. Deselect this check box to remove the filter functionality from the pages.   |
| <b>Display Prior Entry Caption</b>   | Select to display your last count transaction in the Prior Entry box at the bottom of the mobile count page.  |
| <b>Display Show/Hide in tables</b>   | Select to display the Show and Hide links for par count pages. The options make it possible for you to expand and collapse extra line information in count pages.   |
| <b>Suppress Unique Compartments</b>  | Select to remove the Compartment field from the page in this specific circumstance when all items in a location appear in only one compartment each, including a blank compartment, there is not a need to prompt for a compartment on the Item Entry page.   |
| <b>Filter All Alternate Items</b>    | Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID ( MASTER_ITEM_TBL) that matches the alternate is shown in the table.<br><br>Deselect to indicate that the system should not use alternate item identifiers to filter the table. This can improve system performance for the task flow. |
| <b>Allow Interim Save</b>            | Select to provide the ability to allow intermediate saves of par count records midstream during mobile par count activity.  |

See [Installation Options - Mobile Inventory Page](#).

## User Preferences – Mobile Inventory Page

Use the User Preferences – Mobile Inventory page (MIN\_USER\_TASK\_OPT) to for the individual user, define options to determine what features are available on the mobile devices and how the mobile page should appear.

This page is optional; the Mobile Inventory Installation page is used when a user ID does not have this page defined or when the Use Installation Values check box is selected.

### Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Mobile Inventory, and select the *Par Count* task flow

Use this page to establish individual user preferences for display options on the Par Count and Par Count Ad Hoc mobile pages. The values you define are applied to mobile pages for the specified user and override installation options settings.

---

**Note:** You do not have to add a task flow using this page as long as the flow is defined for installation options.

---

The values on this page are the same as those on the installation options page. Select the Use Installation Values check box to apply the values from the Installation Options – Mobile Inventory page for the Par Count task flow. When you click the check box, the display options on this page are no longer available.

**Related Links**

[Installation Options – Mobile Inventory Page](#)

## Performing Par Location Counts Using Mobile Devices

This section discusses how to:

- Enter Par Count page information and define page options.
- Enter item counts for a par location.
- Enter a count for a single item.

## Pages Used to Perform Par Location Counts Using Mobile Devices

Use these page to perform par location counts.

| <i>Page Name</i>       | <i>Navigation</i>  | <i>Usage</i>   |
|------------------------|--|--|
| Par Count              | Mobile Inventory, Par Count  | Enter Par Count page information and define page options.  |
| Par Count - Item Entry | <ul style="list-style-type: none"> <li>• Mobile Inventory, Par Count, enter the par location, and click the Fetch button</li> <li>• Click the Enter Items link on the Par Count page.</li> </ul> | <ul style="list-style-type: none"> <li>• Enter item counts for a par location.</li> </ul> <hr/> <p><b>Note:</b> This page appears automatically when the Display All option is selected.</p> <hr/> <ul style="list-style-type: none"> <li>• Enter a count for a single item</li> </ul> |

## Par Count Page

Use the Par Count page to enter Par Count page information and define page options

## Navigation

Mobile Inventory, Par Count

### Image: Par Count page

This example illustrates the fields and controls on the Par Count page. You can find definitions for the fields and controls later on this page.

Use your mobile device to count par locations within a PeopleSoft Inventory business unit.

#### Header

Click to collapse and expand header details.

#### Unit

Displays the PeopleSoft Inventory business unit where the item stock is located. A default value displays in this field based on your user login ID. This is a required field.

#### Location

Scan or enter the PeopleSoft Inventory par location. This is a required field.

#### Fetch

Click to initiate a search for the business unit and par location combination. The results are displayed below in the Details table.

The fetch is also initiated when you tab out of the Location field.

#### Lookup icon

Click the Lookup icon to access the Lookup page where you can search for field values. On the Par Count page, the Lookup icon enables you to search for business units and par locations.

#### Count ID

Displays the par count ID. The system populates the field when you enter a location and click the Fetch button.

For more information about the field:

See [Par Count - Display All Page](#).

**Options**

Click to view display and processing options for par count pages. You can click the Options link at any time to update optional settings, regardless of the transaction you are performing.

After updating the options, and clicking the Return button, the system navigates to the page from which you selected the Options link.

**Options**

Use the Par Count – Options page

**Navigation**

Click the Options link on the Par Count page.

**Image: Par Count - Options page**

This example illustrates the fields and controls on the Par Count - Options page. You can find definitions for the fields and controls later on this page.

Use this page to change processing and display options for par counts. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

---

**Note:** Selections that you make on the Options page are immediately applied when you access the Par Count Item Entry or Display All pages. When you navigate away from a Par Count page and return to the page, the system replaces the setting with the option settings defined in the PeopleSoft system-defined settings.

---

**Quantity Option**

Identify the item quantity that you will enter for this par location. The default value for this field comes from the Define Par Location - Header page in the PeopleSoft Inventory system:

(Inventory, Replenish Par Locations, Define Par Location, Header).

You can change the option using this field. Field values are:

- *Count*: Enter the current item quantity in the par location
- *Request*: Enter the quantity needed in the par location to meet the optimal quantity for this item.

### Display Option

Select a display option to limit or expand the number of items viewed in the Options table.

The options are:

- *All*: Display all items that are stored in the par location.
- *Included*: Display only items that are included in the current count ID.
- *Excluded*: Display only items in the location that are not yet included in the current count ID.

### Rows to Display

Displays the number of rows the system will display when you select to display all items. This value is set using PeopleSoft system installation options and user preferences.

### Initial Display

Indicates whether a single item will be displayed or all items will be displayed when you complete a search.

Values include:

- *All Items*: Select to initially display par count pages with all items in the search. You can then scroll the list using the Next and Previous buttons.
- *Single Item*: Select to display par count pages with a single item.

### Display Alternate

Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified. Options include: *Alternate Only*, *Alternate as Primary*, *Item Only*, and *Item as Primary*.

For more information about alternate items:

See [Setting Up Alternative Item Identifiers](#).

### Expert Mode

Select to have quick access to data and quicker data entry. By not displaying certain fields, the system has to perform minimal page updates resulting in faster processing.

Values that are not displayed when entering item data include the item description, unit of measure, search prompts for items and compartments.

|                                     |  |
|-------------------------------------|--|
| <b>Display Lookups</b>              | Select to display the Lookup icon for the Business Unit and Location fields on the mobile Par Count page. The Lookup icon enables you to view a list of values and select one.   |
| <b>Display Description</b>          | Select to display the item descriptions on par count pages.  |
| <b>Collapse Headers</b>             | Select to indicate that the header should be collapsed after you fetch the initial values. The header is initially expanded on the Par Count page, but you can change the setting.   |
| <b>Display Filter</b>               | Indicates whether the Filter field and Filter button appear on the Par Count page. Deselect this check box to remove the filter functionality from the page.   |
| <b>Display Prior Entry Caption</b>  | Select or deselect this check box to indicate whether to display the last updated transaction for this par count page.   |
| <b>Display Show/Hide in tables</b>  | Select to display the Show and Hide links for par count pages. The options make it possible for you to expand and collapse additional line information in count pages. Depending on the mobile device and its settings, the Show and Hide value can appear as an Expand icon (right arrow) or Collapse icon (down arrow).  |
| <b>Suppress Unique Compartments</b> | Select this check box to remove the Cpmt (compartment) field from the page in the specific circumstance when all items in a location appear in only one compartment each, including a blank compartment. There will not be a need to prompt for a compartment on the Item Entry page.  |
| <b>Filter All Alternate Items</b>   | <p>Displays the option selected on the Installation Options - Mobile Inventory page or the User Preferences - Mobile Inventory page.</p> <p>If this option is selected, then the system searches through all possible alternate item identifiers when filtering a table. If an alternate item identifier is entered in the Filter field, then the item ID that matches the alternate is displayed in the table.</p> <p>If this option is not selected, then alternate item identifiers cannot be used to filter the table.</p> |
| <b>Allow Interim Save</b>           | Select to provide the ability to allow intermediate saves of par count records midstream during mobile par count activity.   |
| <b>Return</b>                       | Click to return to the Par Count page to continue with the transaction or search that you were performing when you accessed the Options table. The selections that you make are applied immediately to the page that you are using.  |
| <b>Cancel</b>                       | Click to cancel the page. The system returns to the Par Count page and does not record any of the selections that you made.  |

## Par Count - Display All Page

Use the Par Count - Display All page

### Navigation

Mobile Inventory, Par Count

### Image: Par Count - Display All page

This example illustrates the fields and controls on the Par Count - Display All page. You can find definitions for the fields and controls later on this page.

Mobile Inventory Sign Out

**Par Count**

▼ [Header](#)

≡ **Unit**  🔍

≡ **Location**   🔍

Intensive Care Unit - East

**Count ID NEXT**

[Options](#) [Enter Items](#)

**Filter**

[Previous 10](#) | 11-13 of 13 |

| Item   | Qty                          |
|--|------------------------------|
| ▶ 000000000000030034<br>Pacemaker Adj-Pace Adj-Voltage | * <input type="text"/><br>EA |
| ▶ 000000000000030036<br>Table Examination              | <input type="text"/><br>EA   |
| ▶ 000000000000030022<br>Thermometer, Electronic Oral   | * <input type="text"/><br>EA |

Use the Par Count – Display All page to count multiple items for a par location count.

---

**Note:** You can use the Display All page or Item Entry page to perform par counts. The page that you access depends on whether you select to display a single item or all items in the Detail Display check box for par count options. When you are working with multiple items, the Enter Items link is available. When you are working with a single item, the Display All link is available.

---

The items are automatically selected for counting when you are creating a new count ID; however, you can select to not include the item in the count. After entering a count location and clicking the Fetch button, you can begin the count transaction.



**Expand icon**

Click to expand the business unit and location value for additional information. The header information is displayed in this format as an example: (US015 \ COR - 1.)

After you click the Expand icon, the Header value appears with the Collapse icon (down arrow).

---

**Note:** When you initially access the page, the header is expanded. If you selected the Collapse Headers check box for Ad Hoc options, the header will collapse after you fetch a business unit and location. The Expand icon then becomes available for use.

---



**Collapse icon**

Click to collapse the header. You can also click the Header link to collapse the additional header information.

**Header**

Click to collapse the business unit and location information. You can use fields within the header to define and perform searches for another par location

**Unit**

Displays the PeopleSoft Inventory business unit entered on the Par Count page. This field is located in the expanded header.

**Location**

Displays the par location entered on the Par Count page. A description of the location appears below the location if you have selected to display the description. This field is located in the expanded header.

**Count ID**

Displays the par count ID. The system populates the field when you enter a location and click the Fetch button. This field is located in the expanded header.

The field indicates if the system is creating a new count or updating an existing count. When the value of the Count ID field is *NEXT*, then a new count is created when you click the Save button on this page.

If a count ID exists in this field, then an existing count file has already been created by entries saved within the Mobile Inventory Management pages or by the Create Par Location File process in the PeopleSoft Inventory system.

**Options**

Click to make changes to the Par Count page display options. After updating the options, you can return to this page.

**Enter Items**

Click the to access the Par Count – Item Entry page where you can enter the count quantity for an individual item within the par location. This page helps facilitate the entry of a large number of items within a par location.

---

**Note:** The Display All link appears instead of the Enter Items link when you select to enter a single item to the par location count.

---

See [Par Count - Item Entry Page](#).

**Filter (field and button)**

Use the Filter feature to limit your existing search results (items in the group box below) to rows that meet your criteria. This feature reduces the original search results to a smaller number of rows so that you can focus on an area of interest.

The filter options are available if you selected the Display Filters check box as an option.

Use the Filter field to enter a value to compare to the existing search results. Filter criteria includes item ID, item description, unit of measure, compartment ID, manufacturer ID, and manufacturer item ID.

Click the Filter button to apply your filter value to the existing search results and display only the rows that match your filter. The filter feature is also initiated when you tab out of the Filter field. For example, if you enter compartment A5, then the search results are reduced to display only the items located in compartment A5 of the par location.

If the Filter All Alternate Items check box is selected on the Options page, then the system also uses the alternate item identifier as search criteria. The item ID that is associated with the alternate item provided determines the rows that appear in the table.

---

**Note:** The Filter feature is applied to the existing fetch results and does not perform another search on data in the PeopleSoft Inventory system.

---



---

**Note:** After a filter has been applied, any future actions are performed on the filtered results not the original search results. For example, if you use the filter to reduce the search population from 10 rows to 7 rows and then the Use Average button, only 7 rows are populated with the average count.

---

**Clear**

Click to restore your original search results after applying a filter. This button removes the filter and displays all search rows.

In some cases, there might be reduced number of rows displayed due to an error condition, such as the display of count required items. When you click the Clear button, the system returns all rows to the display.

---

**Note:** The Clear button does not perform another search on data.

---

**Save**

Click to save your entries on this page. If there is not a value in the Count ID field, then when you save this page, the system creates a new ID.

---

**Note:** Depending on the number of count items on the page, the Save button might only appear at the bottom of this page. If you have to scroll down the page, another Save button appears for your convenience. The lower Save button performs the same as this button.

---

When you save a count, counts for the items that have been included in the count are updated in the PeopleSoft Inventory system.

The system sets all items in a par location count to be included in the count. When you click Save, and you have not counted an item, the system provides you a list of uncounted items.

Any count required items that do not have a quantity associated with them and do not have Include check box selected will cause an error. You can enter a zero (0) quantity for the count. You must enter quantities for listed items before you can save the transaction. The Par Count Ad Hoc task flow does not have this requirement.

**Expand Collapse**

Click to show or hide additional count information about the item row. This is the item within the par location.

Use the fields in this group box to scan or enter data about one item within the par location. Additional information and selections include:

- **Include check box:** Select this check box to include this item in the count. You can include as many items as needed. The initial setting for the field is selected. You can deselect the Include check box and the system will not include the item in the count when you click the Save button.

If an item is set to Count Required, then the Include check box must be set or an error appears when you save the count. Basically, the Count Required check box ensures that an item is included in the count.

- The Cpmt (compartment ID) within the par location where the item is stored. This is a display only description.
- The manufacturer ID and manufacturer item ID.
- Count Required check box: If this check box is selected, then you must enter a value in the Qty field for this item or an error occurs when you save this page. Zero is an acceptable value in the Qty field.

The Count Required check box defaults from the Define Par Location - Line page in PeopleSoft Inventory (Inventory, Replenish Par Locations, Define Par Location, Line). The check box cannot be changed on this page.

---

**Note:** The Count Required check box is not enforced when you use the Par Count Ad Hoc menu, enabling you to count single items without counting all required items.

---

### Item

Displays the PeopleSoft Inventory item ID and item description. To remove the item description, select the Options link and deselect the Display Descriptions check box.

### Qty (quantity)

Enter or review the quantity for this item within the par location. The unit of measure for the item quantity is displayed below this field. This is a required field.

Based on your entry in the Quantity Option field, the Qty field displays the current item quantity in the par location (count quantity) or the quantity needed in the par location to meet the optimal quantity for this item (requested quantity).

If the count quantity is used, then this field can be populated with the average par location count calculated by the Calculate Average Usage process in PeopleSoft Inventory. This saves input time by reducing the number of items that require an entry on the mobile device.

---

**Note:** The item's unit of measure appears next to the Qty field.

---

## Par Count - Item Entry Page

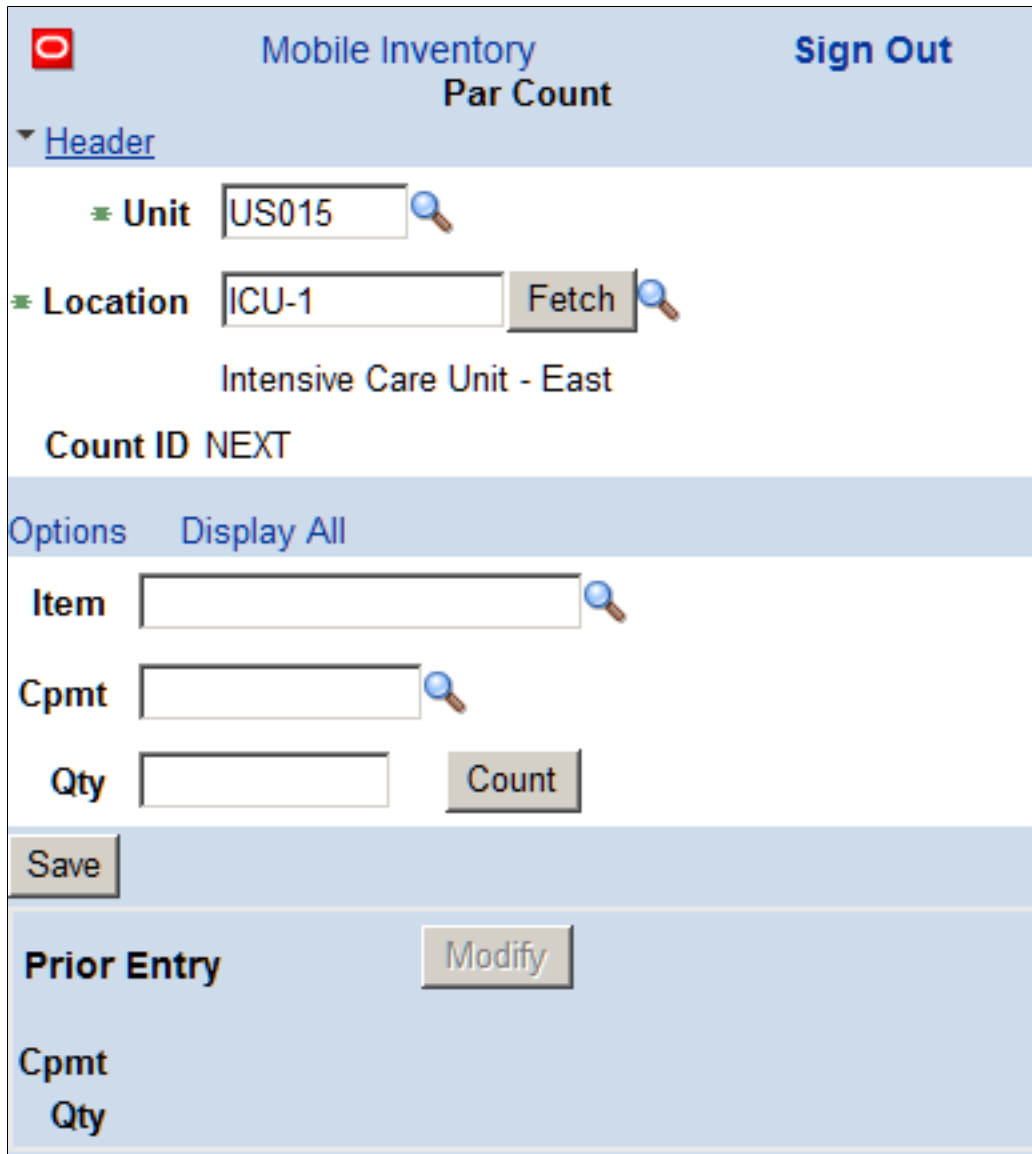
Use the Par Count - Item Entry page to enter item counts for a par location.

**Navigation**

- Mobile Inventory, Par Count, enter the par location, and click the Fetch button
- Click the Enter Items link on the Par Count page.

**Image: Par Count - Item page**

This example illustrates the fields and controls on the Par Count - Item page. You can find definitions for the fields and controls later on this page.



You use the Par Count - Item Entry page to add individual items and counts to a par location count. The page enables you to scan or enter the par location count data using one item at a time. This method is useful when you have a large number of items within the par location and the Par Count page would require you to scroll through many items to find the one you are currently counting.

Also the page enables you to scan the item ID, enter the item quantity, click the Count button, and then move on to the next item. This method requires no searching through lists of items within the par location. Fields and links on this page are similar to those on the Par Count - Display All page.

To count par locations using the Par Count - Item Entry page:

1. On the Par Count page, verify the Unit field is the correct inventory business unit.
2. Scan or enter the par location in the Location field.
3. Click the Fetch button.
4. Scan or enter the item ID.
5. Enter or review the quantity for this item within the par location.
6. Click the Count button.
7. Scan or enter the next item and repeat the above steps until all items are counted.
8. When all items have been entered, click the Save button.

**Display All**

Click the Display All link to return to the Par Count page where you can view and maintain count information for multiple items within the par location.

**Item**

Scan or enter the PeopleSoft Inventory item ID to be counted. You can use the Lookup icon to locate items that are available in the count ID for this location. After you enter the item, the system displays the item description, count information, and the Count button.

After entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.

See [Setting Up Alternative Item Identifiers](#).

**Qty (quantity)**

Enter or review the quantity for this item within the par location. Based on your entry in the Quantity Option field on the Par Count page, the Qty field displays the current item quantity in the par location (count quantity) or the quantity needed in the par location to meet the optimal quantity for this item (requested quantity).

If the count quantity is used, then this field can be populated with the average par location count calculated by the Calculate Average Usage process in PeopleSoft Inventory. This saves input time by reducing the number of items that require an entry on the mobile device.

**Count**

Click to complete the entry of an item count. The item information is moved to the Prior Entry table and the Item Information table is available to enter another item's quantity.

The system automatically activates the Count button. After you enter the count and tab out of the field, the system automatically performs the count. You do not have to click the button.

**Save**

Click the Save button to save your entries on this page. If there is not a count ID, then saving this page creates a new ID. When you click the Save button, the system saves the count ID in the PeopleSoft Inventory system.

**Prior Entry**

Displays the last item that was counted. As you count more items, the system updates this section with the last counted item. You can define whether the Prior Entry table appears using the Options link and deselecting the Display Prior Entry Caption check box.

**Modify (within the Prior Entry group box)**

Click the Modify button to change information about the last count displayed in the Prior Entry group box.

---

## Performing Par Location Ad Hoc Counts on Mobile Devices

This section discusses how to perform par location ad hoc counts.

---

**Note:** The transactions, fields, and values on the par count ad hoc count pages are similar to the ones for par count pages.

---

You use the Par Count Ad Hoc pages the same as the Par Count pages to perform par location count transactions. The Par Count Ad Hoc menu option does not adhere to the rule provided by the Count Required check box for the Par Count page. This enables you to count a single item in a location even though multiple items might be required. Ad hoc counts also make it possible for an administrator to force one user to count certain items while another user may not be required to do so.

**Related Links**

[Performing Par Location Counts Using Mobile Devices](#)

# Counting Inventory Stock Using Mobile Devices

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## Understanding Inventory Stock Counts Using Mobile Devices

Counting inventory stock within a location is a common use for mobile devices. Inventory stock is item stock that is currently recorded in a PeopleSoft Inventory business unit. Counting items can involve counting an entire business unit (such as a warehouse) or a section of a business unit (such as a stockroom on a hospital floor).

After the stock count quantities are recorded, PeopleSoft Inventory can produce a reconciliation report showing the differences between the counted item quantities and the item quantities currently recorded in the inventory business unit. After you have analyzed your count results, you can recount items as needed. When an inventory count is complete, you can run the Stock Quantity Update process in PeopleSoft Inventory to adjust your item quantities within the business unit to match your count results.

To count inventory stock, you must start in PeopleSoft Inventory by defining and creating a counting event. A counting event is a selection of items to be counted based on your criteria. A counting event is identified by a counting event ID.

Using the PeopleSoft Inventory, you can perform two different types of counting events:

- A physical inventory count performs a stock count of the entire PeopleSoft Inventory business unit. You must prohibit material movement for the business unit before performing this type of count.
- A cycle count performs a stock count on a portion of the PeopleSoft Inventory business unit. Cycle counts can be created to count selected material storage locations, items, item families, and other options.

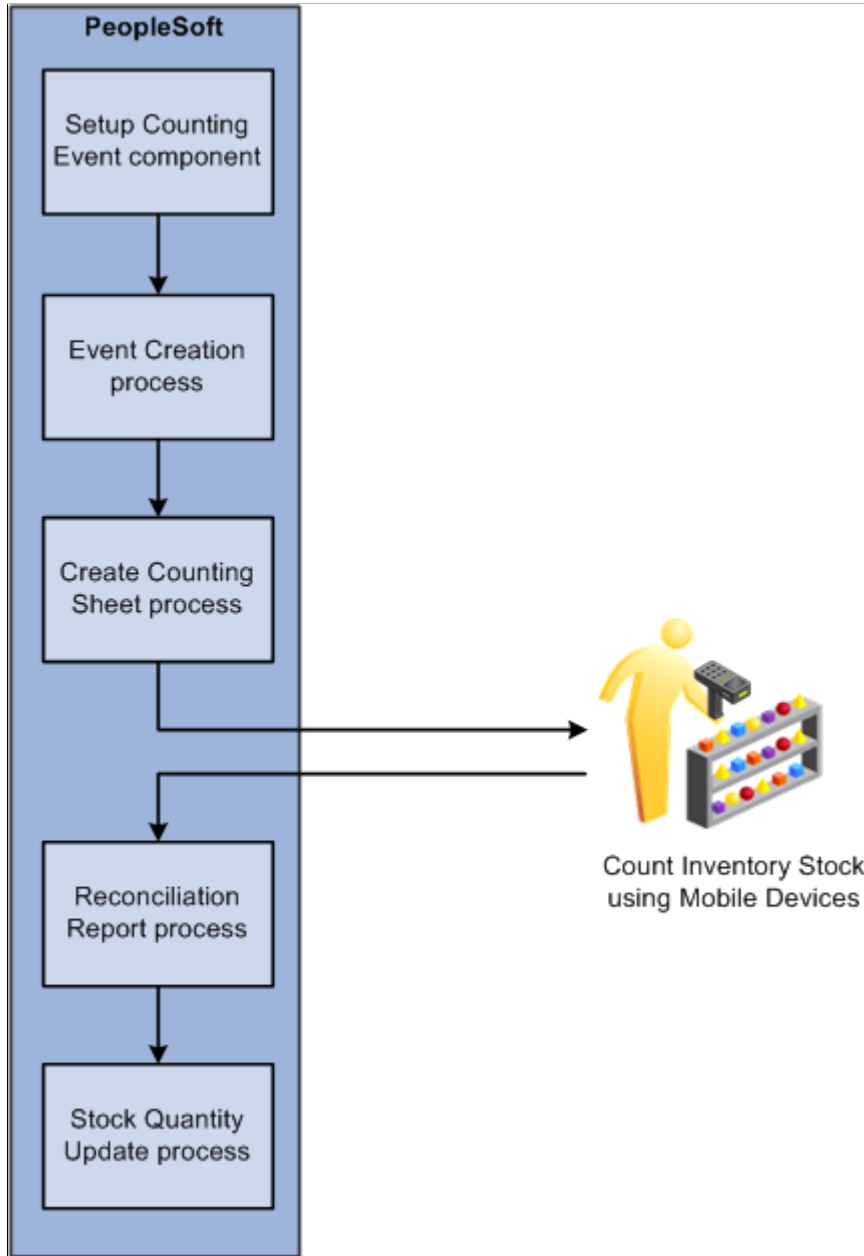
When counting inventory stock you have a number of options, including:

- Using blind counts. A blind count does not display the current quantity of the item within the location. A blind count forces the user to count each item quantity rather than assume the displayed quantity is correct. In contrast, a non-blind count displays the expected item quantity and the user only needs to override it for discrepancies discovered during the counting process.
- Not displaying zero-quantity items. Eliminating zero-quantity records from the count excludes material storage locations identified by the system as empty.

- Breaking up a count into groups. Counting groups enable multiple users to count different locations or items within the same counting event. One counting event can be broken up into multiple counting groups.

**Image: The inventory stock counting process with PeopleSoft Mobile Inventory Management**

The following diagram illustrates the inventory stock counting process when using mobile devices and PeopleSoft Mobile Inventory Management:



Using Mobile Inventory Management, you can count inventory using four types of mobile counts. These counts include:

- Guided count
- Count by location
- Count by item

- Manual count

These counts are described in the next sections.

## Guided Counts

Using the Guided Count application, the system provides you a list of items and locations to be counted. You use the list to count each item in the order they are given. You can perform physical inventory counts or cycle counts using a system-define (guided) count.

You can choose a counting event and group ID to perform from a list of business units that have a count header status of Open. The system enables you to file locations and items based on the item's status, sort location and items, view additional item information, and use default values defined in the PeopleSoft Inventory system.

Other guided count features enable you to:

- Enter a count quantity for an item ID, storage location and unit of measure, container, lot ID, serial ID, and count unit of measure.
- View errors from PeopleSoft on the mobile device.
- Default the count item status based on whether the counting event is blind or non-blind, and the ability to override the count item status.
- Display or hide expected count quantity, based on whether the counting event is blind or non-blind.

## Count by Location

You use the Count by Location feature to count items based on their locations and send the count information back to the PeopleSoft Inventory system. The system provides a unique list of locations that exist in the count, and you then manually enter the items for a given location and their counts. Counting by location is a mixed approach between a guided count and a manual count. You are guided through the locations to be counted, and then for each location you perform a manual count.

If an item is serial controlled, part of the counting event and pre-load serials are selected, then the serials are loaded when that item is selected.

This application can be used to perform either a physical inventory count or a cycle count, depending on how the selected counting event ID was defined. The count is recorded in the COUNT\_INV table.

## Count by Item

You use the Count by Item feature to count items and send the information back to the PeopleSoft Inventory system. The system provides a unique list of items that exist in the count, and you then manually enter the locations and their counts for each item. Counting by item is a mixed approach between a guided count and a manual count. You are guided through the items to be counted, and then for each item, you perform a manual count. The count is recorded in the COUNT\_INV table.

## Manual Count

Use the Manual Count feature to manually count items at a location and send the information back to the PeopleSoft Inventory system. The transaction is recorded in the COUNT\_INV\_INF table. Using manual

counts, you can select the business unit in which to perform the count. You can enter count quantities for an item ID, storage location and unit of measure, container, lot ID, serial ID, and count unit of. You can save the counting data at any time during the mobile transaction.

---

**Note:** Using the Mobile Count application, you can count zero quantities; whereas, with other count applications, the system displays an error for zero count quantities.

---

## Inventory Count Process

The sequence of events in the inventory stock counting process using PeopleSoft Mobile Inventory Management is:

1. Define the parameters for your counting event using the Setup Counting Event component in PeopleSoft Inventory. These parameters are defined at the business unit level and are used when the system creates the next counting event. In this component you define the parameters for:
  - a. Creating a physical inventory count or a cycle count.
  - b. Creating a blind count or a non-blind count.
  - c. Displaying or excluding zero-quantity items.
  - d. Defining the tolerance settings of the reconciliation report.
  - e. For a cycle count, determining what subsection of the business unit should be selected for counting.

This can be done by a number of options including; certain material storage locations, specific items or item families, items with a negative balance, or items that are due to be counted.

2. Create the counting event by running the Event Creation process in PeopleSoft Inventory.

A unique counting event ID is assigned to the counting event which includes a header and a list of the items being counted. The item information includes material storage location, lot ID, serial ID, container ID, quantity, and unit of measure (UOM). When using PeopleSoft Mobile Inventory Management to count inventory stock, the counting event is a system-defined count that obtains the item information from the PHYSICAL\_INV record.
3. Run the Create Counting Sheet process to sort the counting event by item or material storage location.

You can also use this process to break the counting event into counting groups to enable multiple users to count different sections of the same counting event.
4. Use mobile devices to count inventory items.
5. Run the Physical Accounting Reconciliation report to detect any recovery or shrinkage and to determine whether you need to correct any mistakes.
6. When you are satisfied with the count, run the Stock Quantity Update process to update PeopleSoft Inventory with the count data.

## Defining Installation Options and User Preferences for Mobile Inventory Management Counts

This section discusses how to:

- Define user preferences for Mobile Counts.
- Define guided count installation options.
- Define count by location installation options.
- Define count by item installation options.
- Define manual count installation options.

### Pages Used to Define Installation Options and User Preferences for Mobile Inventory Management Counts

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---|------------------------|---|--|
| Setup Component Interfaces              | MIN_CMPINTFC           | Setup Mobile Transactions,<br>Setup Component Interfaces  | Define the component interface for the inventory mobile pages.   |
| Setup Mobile Services                   | MIN_SERVICES           | Setup Mobile Transactions,<br>Setup Mobile Services   | Identify and setup the PeopleSoft Integration Broker services to be used with the Par Count mobile page and the Par Count Ad Hoc mobile page.  |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory, and select a task flow mode  | Define user preferences for Mobile Counts.   |
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | <ul style="list-style-type: none"> <li>• Set Up Financials/Supply Chain, Install, Installation Options and select the Guided Count task flow</li> <li>• Select the Count by Location task flow on the Installation Options page</li> <li>• Select the Count by Item task flow on the Installation Options page.</li> <li>• Select the Manual Count task flow on the Installation Options page.</li> </ul> | <ul style="list-style-type: none"> <li>• Define guided count installation options.</li> <li>• Define count by location installation options.</li> <li>• Define count by item installation options.</li> <li>• Define manual count installation options.</li> </ul> |

## User Preferences - Mobile Inventory Page

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to define user preferences for Mobile Counts.

### Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory, and select a task flow mode

#### Image: User Preferences - Mobile Inventory: Guided Count page

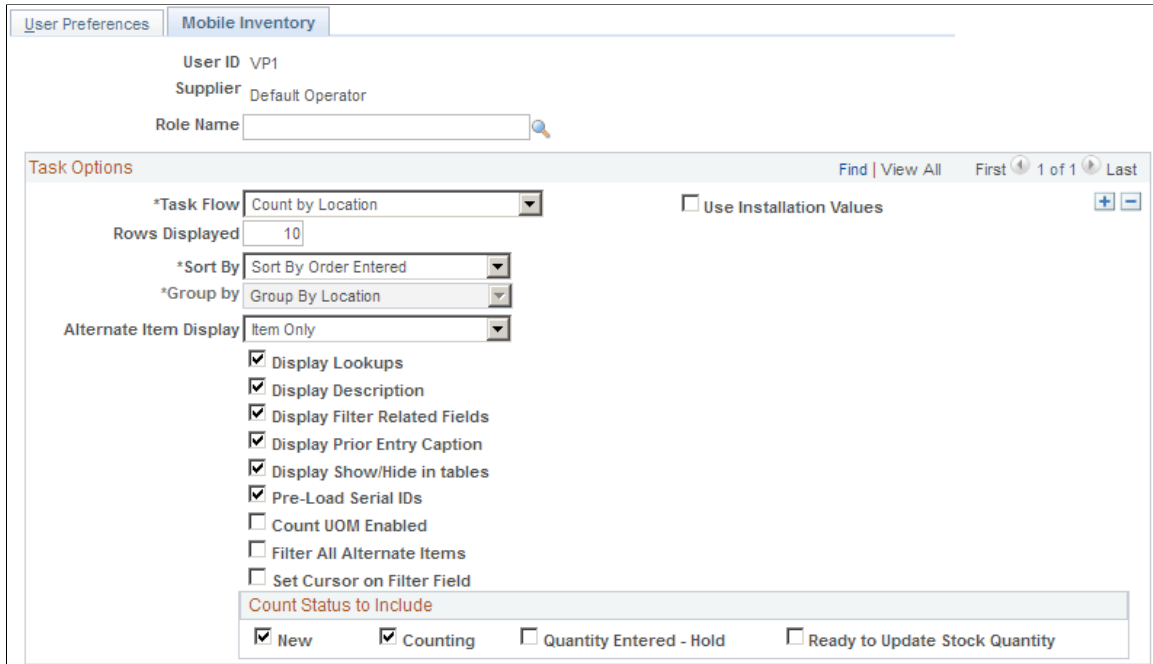
This example illustrates the fields and controls on the User Preferences - Mobile Inventory: Guided Count page.

#### Image: User Preferences - Mobile Inventory: Manual Count page

This example illustrates the fields and controls on the User Preferences - Mobile Inventory: Manual Count page.

**Image: User Preferences - Mobile Inventory: Count by Location page**

This example illustrates the fields and controls on the User Preferences - Mobile Inventory: Count by Location page.



Use the User Preferences - Mobile Inventory pages to define user preferences. If a user preference exists, it will be used instead of the Installation level definition. All task flows are required to have an installation-level definition. Some fields are not available on all counts based on the task requirements, for example, a guided count is the only task with the Initial Display Mode field.

Select the Use Installation Values check box if you want the value define for installation option to override values that you define on this page when you are using a mobile device to perform counts.

**Installation Options - Mobile Inventory Page**

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define guided count installation options.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options and select the Guided Count task flow

### Image: Installation Options - Mobile Inventory: Guided Count page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Guided Count page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory: Guided Count' page. It features two main sections: 'System Options' and 'Task Options'.  
**System Options:**  
 - Key Concatenation Separator: \\  
 - Role Name: MIN User  
 -  Delivery Signature Required  
**Task Options:**  
 - \*Task Flow: Guided Count  
 - Rows Displayed: 10  
 - \*Initial Display Mode: Single Item  
 - \*Sort By: Sort By Order Entered  
 - \*Group by: No Grouping  
 - \*All Item Filter: Display All  
 - Alternate Item Display: Item Only  
 -  Display Lookups  
 -  Display Description  
 -  Display Filter Related Fields  
 -  Display Prior Entry Caption  
 -  Display Show/Hide in tables  
 -  Pre-Load Serial IDs  
 -  Count UOM Enabled  
 -  Filter All Alternate Items  
**Count Status to Include:**  
 -  New  
 -  Counting  
 -  Quantity Entered - Hold  
 -  Ready to Update Stock Quantity

Guided counts are system-defined counts that provide the items for counting. The Guided Count task flow installation page is similar to other count Installation Options pages, except that you can define an initial display mode and have fewer sorting options.

Also, with guided counts, you are provided a list of items to count.

### Initial Display Mode

Select to define the initial display setting for mobile count pages. This setting only applies to the guided count task. The system provides these values as default values for guided counts on mobile devices. You can override the default values using a mobile device.

Initial display values include:

- *Single Item:* Select to initially display guided count pages with a single item.
- *All Items:* Select to initially display guided count pages with all items in the search. You can then scroll the list using the Next and Previous links.

**Sort By**

Select to define the initial display setting for mobile guided count pages when you are displaying all items. The system provides these values as default values on mobile devices. You can override the default values using a mobile device.

Sort option values include:

- *Item ID*: Select to display guided count pages for an item or items, depending on the value that you selected in the Initial Display Mode field.
- *Storage Location*: Select to display items on guided count pages sorted by storage location.

**Group by**

Select to group Guided Count task flow pages by the method that you use to perform the main sort.

---

**Note:** This option toggles the page navigation and groups the items based on the option that is selected. When the *No Grouping* value is selected, then the group navigation is not displayed.

---

Select how you want to group items. Values include:

- *Group by Item*: Select to sort groups by item.
- *Group by Location*: Select to sort groups by location.
- *No Grouping*: Select to not sort groups.

**Related Links**

[Installation Options - Mobile Inventory Page](#)

**Installation Options - Mobile Inventory Page**

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define count by item installation options.

## Navigation

- Select the Count by Item task flow on the Installation Options page.
- 

### Image: Installation Options - Mobile Inventory: Count by Item page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Count by Item page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It is divided into two main sections: 'System Options' and 'Task Options'.  
 In the 'System Options' section, there is a 'Key Concatenation Separator' field with a backslash character, a 'Role Name' field with 'MIN User', and a checked checkbox for 'Delivery Signature Required'.  
 The 'Task Options' section contains several dropdown menus: 'Task Flow' (set to 'Count by Item'), 'Rows Displayed' (set to '10'), 'Sort By' (set to 'Sort By Order Entered'), 'Group by' (set to 'Group By Item'), and 'Alternate Item Display' (set to 'Item Only'). Below these are several checked checkboxes: 'Display Lookups', 'Display Description', 'Display Filter Related Fields', 'Display Prior Entry Caption', 'Display Show/Hide in tables', 'Pre-Load Serial IDs', 'Count UOM Enabled', and 'Filter All Alternate Items'. At the bottom of the Task Options section, there is a 'Count Status to Include' section with checkboxes for 'New', 'Counting', 'Quantity Entered - Hold', and 'Ready to Update Stock Quantity'.

Counts by item are counts where you select an item and add the item to a location. The items are provided to you by the system, and you manually enter the count quantity. Count by item means that the available items are grouped; therefore, the Group By field is set to Group By Item and is not enabled. In addition, the Sort By Item is removed from the available list of Sort By options. Since it is already grouped by item, it would be a redundant grouping.

The installation options for the Count by Item task flow are similar to other Mobile Inventory Management count installation options.

## Related Links

[Installation Options - Mobile Inventory Page](#)

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define count by item installation options.

## Navigation

- Select the Count by Location task flow on the Installation Options page
- 

### Image: Installation Options - Mobile Inventory: Count by Location page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Count by Location page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It features two main sections: 'System Options' and 'Task Options'.  
 In the 'System Options' section, there is a 'Key Concatenation Separator' field, a 'Role Name' field containing 'MIN User', and a checked checkbox for 'Delivery Signature Required'.  
 The 'Task Options' section contains several dropdown menus: 'Task Flow' set to 'Count by Location', 'Rows Displayed' set to '10', 'Sort By' set to 'Sort By Order Entered', 'Group by' set to 'Group By Location', and 'Alternate Item Display' set to 'Item Only'. Below these are several checked checkboxes: 'Display Lookups', 'Display Description', 'Display Filter Related Fields', 'Display Prior Entry Caption', 'Display Show/Hide in tables', 'Pre-Load Serial IDs', 'Count UOM Enabled', and 'Filter All Alternate Items'. At the bottom of the 'Task Options' section, there is a 'Count Status to Include' section with checkboxes for 'New', 'Counting', 'Quantity Entered - Hold', and 'Ready to Update Stock Quantity'.

Counts by location are counts where you select a location and add items to a location. The locations are provided to you by the system, and you manually enter the count quantity for the items. Count by location means that the available items are grouped by location; therefore, the Group By field is set to *Group By Location* and not enabled. In addition, the *Sort By Location* is removed from the available list of Sort By options. Since it is already grouped by location, it would be redundant.

The installation options for the Count by Location task flow are similar to other Mobile Inventory Management count installation options.

## Related Links

[Installation Options - Mobile Inventory Page](#)

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define manual count installation options.

## Navigation

- Select the Manual Count task flow on the Installation Options page.
- 

### Image: Installation Options - Mobile Inventory: Manual Count page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Manual Count page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It features two main sections: 'System Options' and 'Task Options'.  
 In the 'System Options' section, there is a 'Key Concatenation Separator' field with a backslash character, a 'Role Name' field containing 'MIN User', and a checked checkbox for 'Delivery Signature Required'.  
 The 'Task Options' section is a table with various configuration options:  
 - 'Task Flow' is set to 'Manual Count'.  
 - 'Rows Displayed' is set to '10'.  
 - 'Sort By' is set to 'Sort By Location'.  
 - 'Group by' is set to 'Group By Location'.  
 - 'Alternate Item Display' is set to 'Item Only'.  
 Below the table, there are several checked checkboxes:  
 - Display Lookups  
 - Display Description  
 - Display Filter Related Fields  
 - Display Prior Entry Caption  
 - Display Show/Hide in tables  
 - Count UOM Enabled  
 - Filter All Alternate Items

Manual counts are counts where you select an item and add the item to a location. Unlike other counts, the system does not provide you a list of items or locations to be counted except that the Count Status field is removed. This count is based on the Manual Count Component in PeopleSoft. In addition, the Pre-Load Serial ID check box is also removed since there is no counting event on which to base the manual count. You manually enter the count quantity.

The installation options for the Manual Count task flow are similar to other Mobile Inventory Management count installation options.

## Related Links

[Installation Options - Mobile Inventory Page](#)

# Performing Guided Counts in PeopleSoft Mobile Inventory Management

This section discusses how to:

- Define guided count search criteria.

- Manage item counts using mobile devices.
- Add single items to guided counts.
- Look up guided count objects.
- Display all items in guided counts.
- Maintain count statuses for guided count items.
- Add lot-controlled items to guided counts.
- Add serial-controlled items to guided counts.

## Pages Used to Perform Guided Counts in PeopleSoft Mobile Inventory Management

Use these page to perform guided counts.

| <i>Page Name</i>                  | <i>Navigation</i>   | <i>Usage</i>  |
|-----------------------------------|---|---|
| Guided Count (search)             | Mobile Inventory, Guided Count, and enter search criteria   | Define guided count search criteria.  |
| Guided Count                      | Mobile Inventory, Guided Count, and select a search results value   | Manage item counts using mobile devices.  |
| Guided Count – Add Item           | Mobile Inventory, Guided Count, and click the Add Item button   | Add single items to guided counts.  |
| Look Up                           | Mobile Inventory, Guided Count , and click a Lookup icon  | Look up guided count objects.<br><hr/> <b>Note:</b> The Lookup example used in this section if for Storage Locations. <hr/> |
| Display All                       | Mobile Inventory, Guided Count, and click the Display All link.   | Display all items in guided counts.   |
| Guided Count (Count Status field) | Mobile Inventory, Guided Count, and click the Expand button for an item.  | Maintain count statuses for guided count items.   |
| Guided Count – Add Item           | Mobile Inventory, Guided Count, click the Add Item link and select to add a lot-controlled item to the count    | Add lot-controlled items to guided counts.  |
| Guided Count – Add Item           | Mobile Inventory, Guided Count, click the Add Item link and select to add a serial-controlled item to the count | Add serial-controlled items to guided counts.   |

### Guided Count - Selection Criteria Page

Use the Guided Count - Selection Criteria page to define guided count search criteria.

## Navigation

Mobile Inventory, Guided Count, and enter search criteria

### Image: Guided Count – Selection Criteria page

This example illustrates the fields and controls on the Guided Count – Selection Criteria page. You can find definitions for the fields and controls later on this page.

Use this page to search for a guided count using a business unit, event, or group. To view additional search criteria, click the Selection Criteria link. Click the Options link to view search options. These options are predefined using user preferences and installation options in the PeopleSoft Inventory system.

#### Unit

Select a PeopleSoft Inventory business unit in which counts have been defined. This field is required.

#### Event

Select an inventory counting event. You must start a count by defining and creating a counting event. This is a selection of items to be counted based on search criteria. A counting event is identified by a counting event ID.

#### Group

Select a counting group. A counting group enables multiple users to count different locations or items within the same counting event. One counting event can be broken up into multiple counting groups.

---

**Note:** Zero is a valid value that you can enter. A value of blank does not mean zero.

---

#### Search

Click to perform a search based on the criteria that you entered. The Search Results table displays the results of the search. If the search criteria results in one row being returned, the flow automatically loads that result. The search feature is also initiated when you tab out of the Group field.

## Selection Criteria

Using the Selection Criteria table, you can override default values that have been established in the Installation Options. This criteria is related to how the system processes counts.

|                                |   |
|--------------------------------|---|
| <b>New</b>                     | Select to search for detail lines in a non-blind, system-defined counting event for which you have not run the Counting Sheet process. Deselect the check box to not include these lines in the search results. |
| <b>Counting</b>                | Select to search for detail lines in a blind system-defined counting event.   |
| <b>Quantity Entered – Hold</b> | Select to search for items that have had their count quantities prevented from being applied to system tables by the Stock Quantity Update process.   |
| <b>Ready to Update</b>         | Select to search for counting event detail lines with quantities that are to be used to update the system tables when you run the Stock Quantity Update process.  |

## Option

Use the Options section

## Navigation

Click the Options link on the Guided Count page.

### Image: Guided Count - Options page

This example illustrates the fields and controls on the Guided Count - Options page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mobile Inventory Guided Count' options page. At the top, there is a header with a red 'X' icon, the text 'Mobile Inventory', and a 'Sign Out' link. Below the header, the title 'Guided Count' is centered. The page contains several input fields and controls:

- Unit:** A text box containing 'US010' with a magnifying glass icon.
- Event:** An empty text box with a magnifying glass icon.
- Group:** An empty text box with a 'Search' button and a magnifying glass icon.
- Selection Criteria:** A section with a blue arrow icon and the title 'Count Item Statuses'. It contains four checked checkboxes: 'New', 'Counting', 'Qty Entered-Hold', and 'Ready to Update'.
- Options:** A section with a blue arrow icon and several controls:
  - Rows To Display:** A text box containing '10'.
  - Detail Display:** A dropdown menu set to 'Single Item'.
  - Sort By:** A dropdown menu set to 'Sort By Order Entered'.
  - Group By:** A dropdown menu set to 'No Grouping'.
  - All Item Filter:** A dropdown menu set to 'Display All'.
  - Alternate Item Display:** A dropdown menu set to 'Item Only'.
- Display Options:** A list of checkboxes:
  - Display Lookups
  - Display Description
  - Display Filter
  - Display Prior Entry Caption
  - Display Show/Hide in tables
  - Pre-Load Serials
  - Enable Counting UOM
  - Filter All Alternate Items

Use this page to change processing and display options for guided counts. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

### Rows to Display

Enter the maximum number of items to display in the search results for guided count pages. The default value depends on the Mobile Inventory Installation Options page setting for guided counts.

### Detail Display

Select how you want to display search details, one item at a time or all items at a time, where you can scroll through the list to select items.

|                                    |   |
|------------------------------------|---|
|                                    | The default value depends on the Mobile Inventory Installation Options page or User Preferences page for guided counts.   |
| <b>Sort By</b>                     | Select the method by which you want to sort guided count pages. You can sort by item ID or storage location.<br><br>See <a href="#">Installation Options - Mobile Inventory Page</a> .  |
| <b>Group by</b>                    | Select the method by which you want to sort event groups for guided count pages. You can sort by item ID, location or select not to not sort event groups.<br><br>See <a href="#">Installation Options - Mobile Inventory Page</a> .  |
| <b>All Item Filter</b>             | Select a value to define how you want the mobile device to display items. Values include: <ul style="list-style-type: none"> <li>• <i>Display All</i>: Select to include all items in a filtered search.</li> <li>• <i>Display Counted Only</i>: Select to display only those items that have been counted when you perform a filtered search for items.</li> <li>• <i>Display Uncounted Only</i>: Select to display only those items that have not been counted when you perform a filtered search.</li> </ul> |
| <b>Alternate Item Display</b>      | Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: <i>Alternate Only</i> , <i>Alternate as Primary</i> , <i>Item Only</i> , and <i>Item as Primary</i> .<br><br>See <a href="#">Setting Up Alternative Item Identifiers</a> .   |
| <b>Display Lookups</b>             | Select provide Lookup icons for fields that are available for searches.   |
| <b>Display Description</b>         | Select whether to display item descriptions in the search results. To view the description, click the expand button next to the Item ID field on the Guided Count page after performing the search.   |
| <b>Display Filter</b>              | Select whether you want to have the Filter field and button on the Guided Count page. The feature enables you to filter the contents of a search to just those specific values you want.  |
| <b>Display Prior Entry Caption</b> | Select to enable the display of the last item that was counted. When you count or update an item count, the system provides the last item and count value in a table at the bottom of the count page.   |
| <b>Display Show/Hide in tables</b> | Select to display the Show and Hide menu options for guided count pages.  |

---

**Note:** Depending on the mobile device and its view settings, the Show and Hide links might appear as Expand (right arrow) and Collapse (down arrow) icons. The Expand icon shows the additional information, while the Collapse icon hides the additional information.

---

### **Pre-Load Serials**

Select to pre-load serial IDs for a particular item and location when the Serial ID page is displayed. The default value is selected.

If the item being counted is a serial-controlled item, then when the item is loaded, the mobile application disables the Count Quantity field and adds a field from which to add serials. The Count Quantity field is automatically set to display the number of serials that are counted and places the cursor in the Serial field.

---

**Note:** The existing serials in the count are loaded automatically if the Pre-Load Serials check box is selected.

---

If the Pre-Load Serials check box is selected, then the Serials table appears with the serial ID populated in the Serials table. The system only loads the serials that already exist in the counting event. If you do not select the check box, the Serials table does not appear until a serial is manually added.

### **Enable Counting UOM (enable counting unit of measure)**

Select to display the unit of measure used to count event detail line items. When you select the check box, the Counting UOM field is enabled on guided count pages.

### **Filter All Alternate Items**

Displays the option selected on the Installation Options – Mobile Inventory page or the User Preferences – Mobile Inventory page.

If this option is selected, then the system searches through all possible alternate item identifiers when filtering a table. If an alternate item identifier is entered in the Filter field, then the item ID that matches the alternate is displayed in the table.

If this option is not selected, then the system does not use alternate item identifiers to filter the table. This can improve system performance for the task flow.

## Search Results

After you click the Search button, the system returns the events and groups that match the search criteria that you entered. In the next example, the event ID was entered without a group ID. The system returned all groups within that event. You could narrow the search by entering a specific group.

### Image: Guided Count - Search Results page

This example illustrates the fields and controls on the Guided Count - Search Results page.

The screenshot shows the 'Mobile Inventory Guided Count' interface. At the top, there is a 'Sign Out' button. Below that, the search criteria are displayed: 'Unit' with the value 'US010', 'Event' with the value '1', and 'Group' which is empty. There are search icons next to each field and a 'Search' button. Below the search criteria, there are tabs for 'Selection Criteria' and 'Options'. The 'Search Results' section contains a table with the following data:

| Unit  | Event | Group | Start Date |
|-------|-------|-------|------------|
| US010 | 1     | 0     | 08/15/2000 |

The Search Results table displays the results of the search including the business unit, event, group, and the date on which the count was started. Click any of the Search Results links to access the Guided Count page with the guided count details for the event detail line.

---

**Note:** If the system returns only one row, then you are immediately provided access to the count.

---

If you selected to count individual items using the Options section, the Guided Count page displays the first item and location in the count. If you selected to display all the items in the count, the items are listed on the Guided Count page.

## Guided Count Page

Use the Guided Count page to manage item counts using mobile devices

## Navigation

Mobile Inventory, Guided Count, and select a search results value

### Image: Guided Count page

This example illustrates the fields and controls on the Guided Count page. You can find definitions for the fields and controls later on this page.

The Guided Count page is the basis for working with guided counts. The system displays the business unit, event, and group IDs in the header. The initial page also displays the first event detail line item for the system-defined count. You can scroll through the items using the scrolling arrows.

Fields that appear on the page are based on the PeopleSoft Inventory system installation settings and the search criteria and search options that you defined when access the Guided Count page.

Using the page, you can:

- Further filter count items.
- Enter count quantities for individual items.
- Complete the item count.
- Return to the Search page to define a different set of search options.
- Change the count options.
- Navigate to the Display All page to view a listing of all items in the count.
- Navigate to the Add Item page to include another item in the count.

### Options

Click to update the display options for the page. When you return to the page, the new display values are applied to the page.

### Display All

Click to view the entire list of items that have been defined for a guided count. The list also includes items that have been

added to the count. You can filter the list to just view the items that have already been added to the count, but have not been counted.

See [Guided Count Display All Page](#).

### Add Item

Click to access the Guided Count - Add Item page where you can select an item to count.

See [Guided Count - Add Item Page](#).

### Filter (field)

Enter a character string by which you want filter items in the list. The system searches for the string based on string values in the storage location ID, item ID and description, lot ID, container ID, manufacturer, or manufacturer's item ID. If you do not enter filter criteria, the filtered list contains all items.

### Filter (button)

Click to create a list that contains the items matching the filter string that you entered. The filter feature is also initiated when you tab out of the Filter field.

### Clear

Click to remove the filter criteria, clear the contents of list and replace it with the original list.



**double right arrow icon**

Click to advance to the last item ID/storage location in the count.



**single right arrow icon**

Click to advance to the next item ID/storage location in the count.



**double left arrow icon**

Click to advance to the first item ID/storage location in the count.



**single left arrow icon**

Click to advance to the previous item ID/storage location in the count.

### Location

Displays the location. The location changes when you scroll through the count list. The location provides the levels of a location starting with the area.

### Item

Displays the system-supplied item. Use the scroll arrows to change the item and click the Expand icon to view additional item details.



**Expand**

Click to expand additional information about the item. This information can include the item's description, the manufacturer, manufacturer's item ID, or the supplier's item description and count status.

The system provides count status values as default values on mobile devices. You can override the default values using a mobile device.

The system default value for the count status initially appears when you click the Expand button to view access the Count Status field.

See [Count Status Field](#).



**Collapse**

Click to collapse (hide) additional information about an item.

**Stor UOM (storage unit of measure)** Displays the unit of measure in which the item is stored. For example *EA* or *BOX*. If this value is changed, then the Count UOM field is automatically changed to match the new storage unit of measure value.

**Count UOM (count unit of measure)** Select the unit of measure in which you want to count the item. The count unit of measure default value is the storage unit of measure. You can override the value. This field is not enabled if the Enable Count UOM check box is deselected in the Options table.

**Count Qty (count quantity)** Enter a count quantity for the item. You can update the quantity before sending the count to the PeopleSoft Inventory system.

**Count** Click the Count button to add the item count that you just entered. You can also initiate the count feature by tabbing out of the Count Qty field. The Count feature adds the item count to the guided count that the system places into the PeopleSoft Inventory system when you click the Save button.

When you count an item, you add the count quantity, but the item isn't actually counted until you save the count transaction. Use the Display All button to view all items that have been added to the count.

When you count the item, the mobile device displays the item as the last item counted. You can update the count quantity after it is displayed or use the Delete button to delete the count. This does not delete the item, it only deletes the count.

**Serial** Enter a serial ID that you want to count. This field is only displayed if the item is serial controlled. If the serial being entered already exists in the Serial table, then a new row is not added and the existing serial is marked as counted.

**Lot** For lot-controlled items, use this field to enter or change the lot ID.

**Save** Click to save the information that you've entered for the guided count item. This completes the count for this transaction. Upon saving, the count information is recorded in the PeopleSoft Inventory system, and you can start a new mobile count.

**Return to Search**

Click to return to the search page where you can define search criteria and options to perform another search for a guided count.

When you access the Guided Count page again, the selection criteria and options retain any changes that you might have made using the initial search for a guided count.

When you navigate back to the Mobile Inventory task flow menu, the system will reset the search values back to the default values defined in the PeopleSoft Inventory system.

**Prior Entry**

Displays information about the last item count that you entered.

As you count more items, the system updates this section with the last counted item. You can define whether the Prior Entry group box appears using the Options link and deselecting the Display Prior Entry Caption check box.

**Modify (within the Prior Entry group box)** Click the Modify button to change information about the last count displayed in the Prior Entry group box.



**(Delete icon)**

Click to delete the last item count from the table list. The system removes the item and refreshes the list.

**Scrolling Among Locations and Items**

PeopleSoft provides an advanced scrolling feature for the Display All/All Items page based on your selection in the Group By field within the Options for guided counts:

- If you have selected the *Group by Location* value in the Group By field, then you can scroll by storage locations.
- If you have selected the *Group by Item* value in the Group By field, then you can scroll by items.

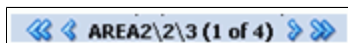
Mobile Counting provides the advanced scroll feature for accessing specific areas and specific items within those areas.

For example, for *Group by Location* you can use a combination of forward and backward scrolling arrows to navigate among locations and after accessing the location, navigate to specific sets of items within the location. To scroll forward from one area to another, click the double right arrows or to scroll backward from one item to another, click the left single arrow. The system updates location information as you scroll.

This scroll area illustrates the use of the double right arrow icon after you select to count items in a group:

**Image: Scroll example (1 of 3)**

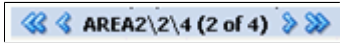
This example illustrates the controls on the Scroll example (1 of 3).



Note that the location has four sets of items. You can use the single right arrow icon to go to the next set in the location as shown in this example:

**Image: Scroll example (2 of 3)**

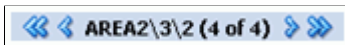
This example illustrates the controls on the Scroll example (2 of 3).



The system updates the page to indicate that the set item is the second of four item sets. Also, the system updated the location information to indicate that the item in storage location 4.

**Image: Scroll example (3 of 3)**

This example illustrates the controls on the Scroll example (3 of 3).



When you scroll to the beginning or end of the list, the system does not update the page.

## Guided Count - Add Item Page

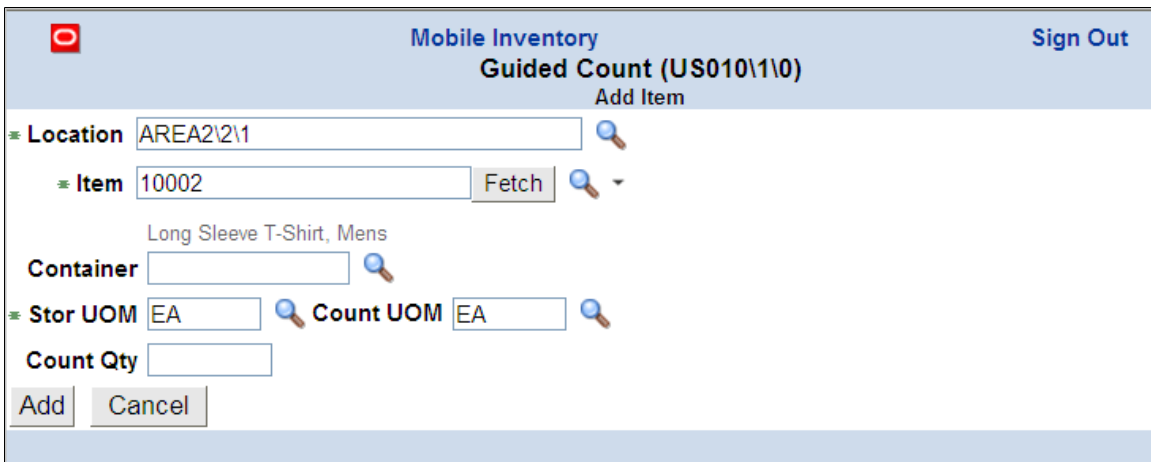
Use the Guided Count - Add Item page to add single items to guided counts

**Navigation**

Mobile Inventory, Guided Count, and click the Add Item button

**Image: Guided Count - Add Item page**

This example illustrates the fields and controls on the Guided Count - Add Item page. You can find definitions for the fields and controls later on this page.



Use this page to add a single item to a guided count. This page is used to count an item/storage location that did not previously exist in the count event. You complete the fields similar to how you add an item using the Guided Count page.

For more information about fields and serial information on this page, see the previous "Counting Items for Guided Counts" section.

Required fields for this page include the Location, Item, and Stor UOM fields. You can also provide the lot, configuration code, container, count unit of measure, count quantity, and serial items.

---

**Note:** If a location and item combination already exists, but in a different group, the system displays an error when you attempt to add the count.

---

|   |   |
|---|---|
| <b>Location</b>                           | Select a storage location for the item that you are adding. You can either enter a location or select a value from the Lookup icon. If you select to look up a location, the system displays the Look Up Storage Location page.   |
|   | See <a href="#">Guided Count - Add Item Page</a> .  |
| <b>Item</b>                               | Select an item to add to the count. This field is required. You can use the Lookup icon to search for items. The prompt is available if you selected the Display Prompts check box for guided count searches. You can view the item description by clicking Expand next to the Lookup icon.                           |
|   | After entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.   |
|   | See <a href="#">Setting Up Alternative Item Identifiers</a> .   |
| <b>Fetch</b>                              | Click to retrieve the item attributes for the item that you selected. The fetch is also initiated when you tab out of the Item field. The fetch feature retrieves the attributes of the item to determine what fields to display. For example, if the item is lot controlled, then the Lot field appears on the page. |
|   | Fetch is not a search function. The item Lookup icon also retrieves the item attributes so only one of these options is required. If you don't use either option, when you click the Add button, the system checks the item attributes and ensures that required fields are not missing.                              |
| <b>Mfg Item</b>                           | Displays the manufacturer and the manufacturer's item ID.   |
| <b>Lot</b>                                | Enter the lot ID if the item is lot-controlled. This field only appears if the item is lot controlled. The field appears after you use the Fetch or item Lookup icon.   |
| <b>Config Code</b>                        | Enter the configuration code if the item is a configured item. This field only appears if the item is configured. This field appears after you use the Fetch or item Lookup icon.   |
| <b>Container</b>                          | Enter the container ID that relates to how the item is stored. For example, it could be stored on a certain sized skid or in a certain sized box.   |
| <b>Stor UOM (storage unit of measure)</b> | Displays the unit of measure in which the item is stored. For example <i>EA</i> or <i>BOX</i> . If this value is changed then the count unit of measure is automatically changed to match the new value.  |

|  |   |
|--|---|
| <b>Count UOM (count unit of measure)</b> | Select the unit of measure in which you want to count the item. The count unit of measure default value is the storage unit of measure. You can override the value. This field is not enabled if the Enable Count UOM field is deselected page in the Options table.  |
| <b>Count Qty (count quantity)</b>        | Enter a count quantity for the item. You can update the quantity before sending the count to the PeopleSoft Inventory system.   |
| <b>Add</b>                               | <p>Click to add this item to the guided count. The Add feature is also initiated when you tab out of the Count Qty field. When you add an item, the system returns to the Guided Count page. Now, the Last Item Counted table displays the item that you just added along with the count quantity.</p> <p>The item will also display in the list of items defined for the guided count when you display all items. After adding the item, you can click the Add Item link to add another item to include in the guided count.</p> |
| <b>Cancel</b>                            | Click to cancel the addition of this detail line item to the current guided count. The system returns to the Guided Count page without adding the item information.   |

## Guided Count - Add Item Page

Use the Guided Count - Add Item page to look up guided count objects

## Navigation

Mobile Inventory, Guided Count , and click a Lookup icon

### Image: Look Up Storage Location page example

This example illustrates the fields and controls on the Look Up Storage Location page example. You can find definitions for the fields and controls later on this page.

The screenshot shows a mobile application interface for looking up storage locations. The title bar reads "Look Up Storage Location". Below the title, there are several input fields: "Unit" (US010), "Area" (AREA3), "Lev 1" (A1), "Lev 2" (R1), "Lev 3" (B1), and "Lev 4" (empty). Below these fields are three buttons: "Look Up", "Clear", and "Cancel". At the bottom of the form, there is a "Storage Location" field displaying the result "AREA3\A1\R1\B1".

Use this page to search for specific storage locations. The previous example illustrates the Storage Location lookup. All Lookup pages provide the appropriate fields based on the value that you are looking up. Lookup is supported for all non-quantity fields.

Using the storage location example, the page displays the business unit along with the Area field and Lev 1-4 (level) fields. You can search for locations using a variety of search options. For example, you can search for all locations in an area by entering the area ID and clicking the Lookup icon. The system displays all area locations for the business unit along with the storage levels.

Or, you can search for a specific location level by entering the number in the location, such as 2 in the Level 2 field. In this case, the system displays all level 2 storage locations for a business unit. The Lookup supports partial value lookup. For example, if you enter AREA in the area field it will return all storage locations where the area contains the value AREA. The lookup is not case sensitive, so lower or upper case characters will return the same result.

Click the location link to insert the value in the Location field and return to the Add Item page.

### Area

Enter a location on which you want to base a location search.

You can enter the first character of a location and the system will display the search results for all locations beginning with that character, along with all the storage levels in the locations.

After entering a location, click the Lookup icon to retrieve the search results. Using the search results, you can select a specific storage location in which to count the item.

**Lev (1 -4) (level 1-4)**

Enter a level value in one or more of the Lev fields. When you click the Lookup icon, the system retrieves the location name and the levels that match the levels you entered.

**Look Up**

Click to search for the locations that match the location and level criteria that you entered for the search.

**Clear**

Click to remove the results of the previous search and begin a new search.

**Cancel**

Click to cancel the search and return to the Guided Count page without selecting a location.

**Storage Location**

Click a link in the search results of this column to select the location in which you want to count items in a guided count. The Guided Count page reappears with the location that you selected. You can scroll through the list using the Previous and Next links.

## Guided Count Display All Page

Use the Guided Count display all page to display all items in guided counts.

**Navigation**

Mobile Inventory, Guided Count, and click the Display All link.

**Image: Guided Count page when the Display All link is selected**

This example illustrates the fields and controls on the Guided Count page when the Display All link is selected. You can find definitions for the fields and controls later on this page.

| Mobile Inventory                   |                          | Sign Out                   |   |
|------------------------------------|--------------------------|----------------------------|---|
| Guided Count (US010\1\10)          |                          |                            |   |
| Filter                             | <input type="text"/>     | Filter                     | Clear   |
| Save                               | Add Item                 | Search                     |   |
|                                    |                          | Previous                   | 1-10 of 90 <input type="button" value="Next 10"/> |
| Location                           |                          | Count Qty                  |   |
| AREA1\11<br>10000                  | <input type="checkbox"/> | <input type="text"/><br>EA | ✘   |
| AREA2\111<br>10002                 | <input type="checkbox"/> | <input type="text"/><br>EA | ✘   |
| AREA2\111<br>10003                 | <input type="checkbox"/> | <input type="text"/><br>EA | ✘   |
| AREA2\111<br>10003<br>Cntr BOX01   | <input type="checkbox"/> | <input type="text"/><br>EA | ✘   |
| AREA2\111<br>10004<br>Cntr 1000401 | <input type="checkbox"/> | <input type="text"/><br>EA | ✘   |

Use this page to view and work with all event detail items in the guided count. This page is used initially for a guided count if you have chosen the *All Items* value in the Detail Display field of your guided count Options page.

The Guided Count display all page provides you an overview of count items. You can update count quantities, display additional item information, update the count status for an item, or, if necessary, delete the item from the count. The page header provides the business unit, event ID, and group ID for the guided count.

The Display All feature provides the same functions as the page used for single items, but you can work with multiple items, reducing the time it takes to perform the inventory count. For example, you can insert count quantities for each of the items. As you add counts for each item, the system automatically advances the count to the next guided count item or item and location combination.

**Location**

Displays the location in which you are counting. The item ID that is being counted is also included in the table. Click the Expand icon to view additional details about the item.

**Count Qty**

Enter a count quantity. The system automatically selects the check box next to the Count Qty field when you enter a quantity and tab out of the field. When you display the item, and a count has been added, the check box will be selected.

**Delete**

Click to delete this item from the list of items to be counted.

## Count Status Field

Use the Count Status field to maintain count statuses for guided count items

## Navigation

Mobile Inventory, Guided Count, and click the Expand button for an item.

### Image: Count Status field drop-down list

This example illustrates the fields and controls on the Count Status field drop-down list. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Mobile Inventory' application interface. At the top, there is a 'Sign Out' button and the title 'Guided Count (US010\1\0)'. Below the title are navigation options: 'Options', 'Display All', and 'Add Item'. A search filter is present with a 'Filter' button and a 'Clear' button. The current item is 'Item 2 of 90'. The location is 'AREA2\1\1' and the item is 'Item 10002', described as 'Long Sleeve T-Shirt, Mens'. The 'Mfg Item' field is empty. The 'Count Status' field is a drop-down menu currently set to 'New'. Below this are fields for 'Stor UOM EA' and 'Count UOM EA'. A 'Count Qty' input field is followed by a 'Count' button. At the bottom, there are 'Save' and 'Search' buttons. A 'Prior Entry' section shows a 'Modify' button with a red 'X' icon. Below this, the 'Location' is 'AREA1\1', 'Item' is '10000', 'Count Qty' is '100 EA', and the 'Counted' checkbox is checked.

You use the Count Status field to update the count status of the counting event detail line. When you save the event detail line, the system applies your updates to the PeopleSoft Inventory system.

### New

Select to include an uncounted line in the Counting Sheet report or file when you run the Counting Sheet process. The Counting Sheet process changes the status to Counting for blind counts or to Ready to Update for non-blind counts. Events with new detail lines have a header status of Open.

### Counting

Select to place the detail line in a Counting status. Detail lines with a status of Counting are considered uncounted.

The Counting Sheet process changes the status of detail lines in a blind, system-defined counting event from New to Counting. When you enter a count quantity for items with a Counting

status, the status automatically changes to Ready to Update. Events with items in a Counting status have a header status of Open.

**Qty Entered-Hold (quantity entered-hold)** Select to prevent the count quantity of a detail line from being applied to system tables by the Stock Quantity Update process. Events with items in a Hold status have a header status of Open.

**Ready to Update** Select to use the quantities of a counting event detail line to update tables when you run the Stock Quantity Update process.

If you change the quantity of a detail line, the PeopleSoft Inventory system automatically changes the status to Ready to Update. Events with detail lines in a Ready to Update status have a status of Open.

## Guided Count: Add Item Page

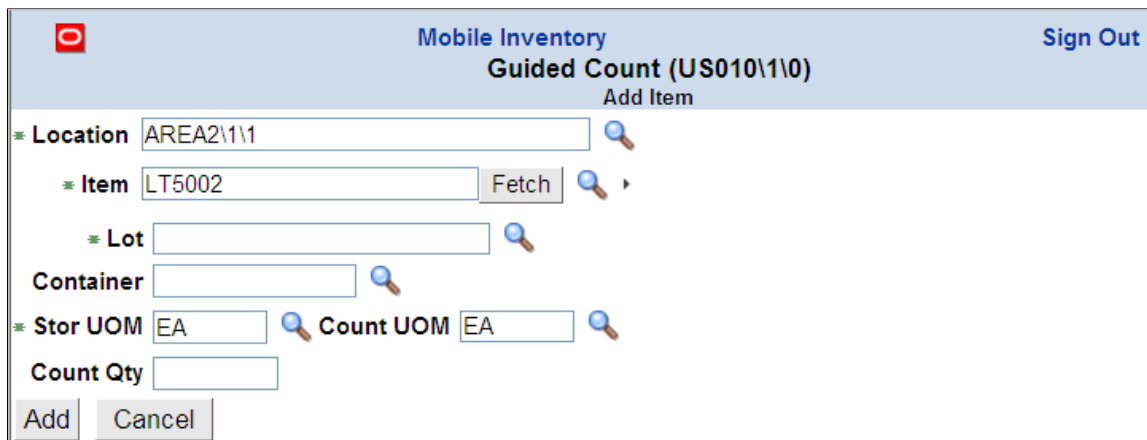
Use the Guided Count: Add Item page to add lot-controlled items to guided counts.

### Navigation

Mobile Inventory, Guided Count, click the Add Item link and select to add a lot-controlled item to the count

### Image: Guided Count - Add Item page for lot-controlled items

This example illustrates the fields and controls on the Guided Count - Add Item page for lot-controlled items. You can find definitions for the fields and controls later on this page.



Lot control is the process of using procedures such as assigning lot IDs, and tracking parameters, such as status and expiration date, for each lot (batch) as it moves through the system. Using mobile counts, you can count lot-controlled items and send the information to the PeopleSoft Inventory system.

**Lot** Select a lot value. This field appears when the item is lot controlled. When you are counting a lot-controlled item, the Lot is a required field.

**Count Qty (count quantity)** Enter the count quantity for this event detail line item.

**Add**

Click to add the lot-controlled item to the guided inventory count. When you click the button the item for which you added the count appears as the last item counted at the bottom of the page.

You can now add another item, delete the item you just added, display all items, cancel the count and return to the search page, or save the item count.

---

**Note:** The system provides a warning if you select to return the search without saving the count data you entered. Click the Return link to return to the Add Item page, or click the Continue link to access the Guided Count page.

---

**Cancel**

Click to cancel the addition of an item and return to the Guided Count Search Results page.

**Guided Count - Add Item Page**

Use the Guided Count - Add Item page to add serial-controlled items to guided counts.

## Navigation

Mobile Inventory, Guided Count, click the Add Item link and select to add a serial-controlled item to the count

### Image: Guided Count - Add Item page for serial-controlled items

This example illustrates the fields and controls on the Guided Count - Add Item page for serial-controlled items. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Mobile Inventory' application interface for a 'Guided Count (US010\1\0)'. The page title is 'Add Item'. The interface includes the following elements:

- Location:** A text field containing 'AREA1\1' with a magnifying glass icon.
- Item:** A text field containing 'MT\_SR1' with a 'Fetch' button and a magnifying glass icon.
- Container:** An empty text field with a magnifying glass icon.
- Stor UOM:** A text field containing 'BOX' with a magnifying glass icon.
- Count UOM:** A text field containing 'BOX'.
- Serial:** An empty text field with an 'Add Serial' button.
- Count Qty:** A label showing '57'.
- Buttons:** 'Add' and 'Cancel' buttons at the bottom left.

Serial control enables you to track an item as it moves from one material storage location to another. Using mobile counts, you can count serial-controlled items and send the information to the PeopleSoft Inventory system.

See [Guided Count - Add Item Page](#).

When an item is serial-controlled, the system provides a Serial field for you to add the item's serial ID. The system calculates the count quantity automatically, based on the number of serial IDs that you assign to the Serial table. Click the Add Serial button to add additional serial IDs to the count.

### Serial

Enter a serial ID to be counted. This field is only displayed if the item is serial controlled. If the serial being entered already

exists in the Serial table, than a new row is not added and the existing serial is marked as counted.

**Add Serial**

Click this button to add the entered serial to the count. This button is only displayed if the item is serial controlled.

**Count Qty (count quantity)**

Count quantity reflects the number of serials that have been counted for this item. This field is display-only.

**Add**

Click to add the serial-controlled item to the guided inventory count. When you click the button the item for which you added the count appears as the last item counted at the bottom of the page.

You can then add another item, delete the item you just added, display all items, cancel the count and return to the search page, or save the item count.

**Cnt (count)**

This check box is selected if the item with this serial ID has been counted. The check box is clear if this serial ID was not counted.

**Zero**

This check box is selected if the count quantity for this serial ID item was 1 or 0 (zero). If the serial ID was not found in this storage location, then this check box should be clear.

## Performing Counts by Location in PeopleSoft Mobile Inventory Management

This section discusses how to:

- Define count by location search criteria.
- Add and count items for counts by location.

## Pages Used to Perform Counts by Location in PeopleSoft Mobile Inventory Management

Use these pages to perform counts by location.

| <i>Page Name</i>  | <i>Navigation</i>  | <i>Usage</i>                                |
|-------------------|--|---|
| Count by Location | Mobile Inventory, Count by Location, and enter search criteria     | Define count by location search criteria.   |
| Add Item          | Mobile Inventory, Count by Location, and click the Add Item button | Add and count items for counts by location. |

## Count by Location Page

Use the Count by Location page to define count by location search criteria.

### Navigation

Mobile Inventory, Count by Location, and enter search criteria

### Image: Count by Location - Selection Criteria page

This example illustrates the fields and controls on the Count by Location - Selection Criteria page.

Use this page to search for locations using a business unit, event, or group. To view additional search criteria, click the Selection Criteria link.

The header section of the Count by Location page provides Lookup icons for the unit, event and group. Click the Search button to initiate a search for matching material storage locations. The search is also initiated when you tab out of the Group field.

When you click the Selection Criteria link, you can select the count item statuses to include in the location search. The options that you select remain selected for this transaction until you return to the main menu. Then when you access the selection criteria again, the system provides the default values from PeopleSoft Inventory installation options and user preferences.

See [Count Status Field](#).

Click the Options link to view and update how and which options the system will display when you are using count by locations pages.

### Image: Count by Location - Options page

This example illustrates the fields and controls on the Count by Location - Options page.

The screenshot shows the 'Mobile Inventory Count by Location' options page. At the top, there is a 'Sign Out' link. Below the title, there are three input fields: '\* Unit' (containing 'US001'), 'Event', and 'Group', each with a search icon. A 'Search' button is located next to the 'Group' field. The page is divided into two main sections: 'Selection Criteria' and 'Options'. Under 'Selection Criteria', there is a sub-section 'Count Item Statuses' with four checkboxes: 'New' (checked), 'Counting' (checked), 'Qty Entered-Hold' (unchecked), and 'Ready to Update' (unchecked). The 'Options' section contains several controls: 'Rows To Display' (input field with '10'), 'Sort By' (dropdown menu with 'Sort By Order Entered'), 'Group By' (dropdown menu with 'Group By Location'), 'Alternate Item Display' (dropdown menu with 'Item Only'), and a list of checkboxes: 'Display Lookups' (checked), 'Display Description' (checked), 'Display Filter' (checked), 'Display Prior Entry Caption' (checked), 'Display Show/Hide in tables' (checked), 'Pre-Load Serials' (checked), 'Enable Counting UOM' (unchecked), 'Filter All Alternate Items' (unchecked), and 'Set Cursor on Filter Field' (unchecked).

Use this page to change processing and display options for counts by location. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

### Related Links

[Performing Guided Counts in PeopleSoft Mobile Inventory Management](#)

## Count by Location Page

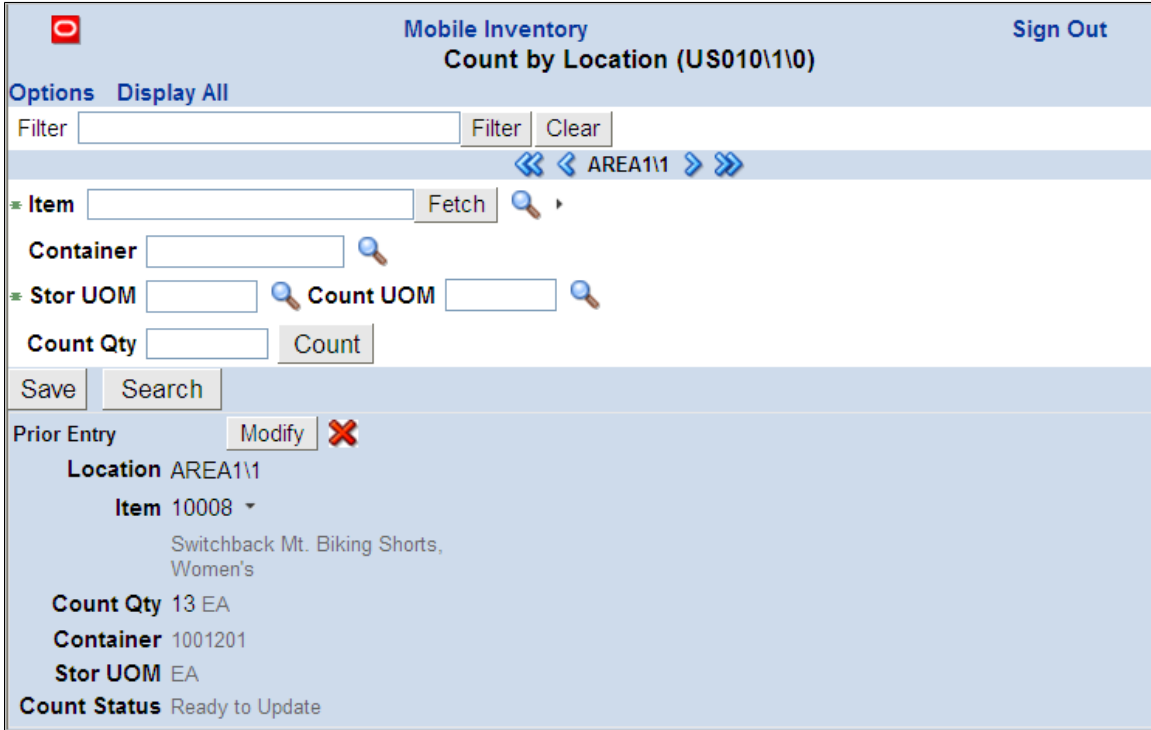
Use the Count by Location page to add and count items for counts by location

**Navigation**

Mobile Inventory, Count by Location, and click the Add Item button

**Image: Count by Location page**

This example illustrates the fields and controls on the Count by Location page.

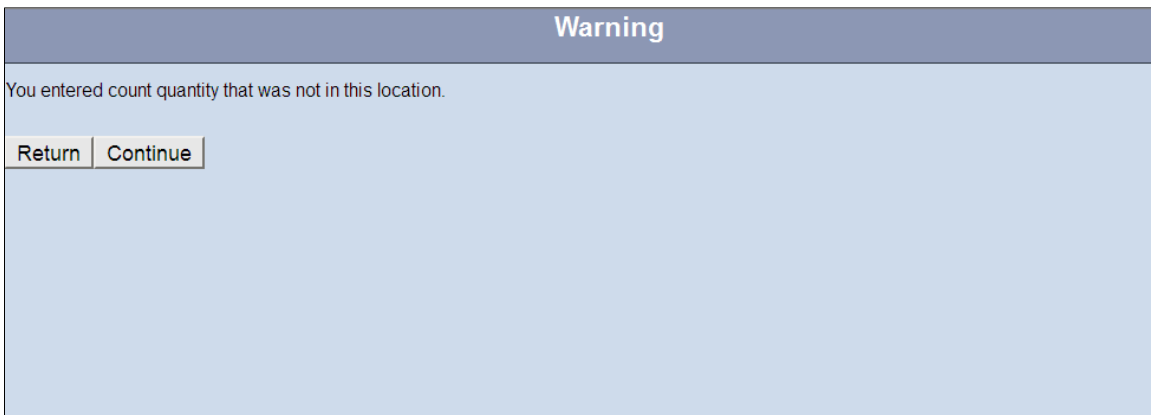


Use this page count the items within a location. You can filter and select locations, items, containers, and storage and count units of measure. The filter feature is initiated by clicking the Filter button or tabbing out of the Filter field. The page functionality is similar to guided count pages except that you are not provided the items to count.

A warning message appears if you enter a count quantity for an item which is new to that location. You can choose to return to the current item or continue, add to list and proceed.

**Image: Count by Location — Warning page**

This example illustrates the fields and controls on the Count by Location — Warning page.



Use the arrow icons beneath the Filter field to skip between storage locations that exist in the count event.

Click the Fetch button to retrieve the item attributes for the entered item. The fetch is also initiated when you tab out of the Item field.

After defining count information for the required fields for an item, click the Count button to add the item to the location count. The Count feature is also initiated when you tab out of the Count Qty field. As each item is added, the system provides Prior Entry section to display the last item that was counted. After all items have been added, you can select the Display All to view and item counts.

Click the Save button to add the item counts for the location to the PeopleSoft Inventory system. When you save the count, the system verifies the count data and displays any errors associated with the count. If errors occur, you need to resolve them and save the count again.

Click the Return to Search button to cancel any location counts that you've added and display the Count by Location page where you can define another search. The system displays the Save Warning page indicating that you have unsaved data on the page. Click the Continue button to continue to the Search page, or click the Return button to go back to the count page and continue with the count by location.

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**Note:** Counting a lot- or serial-controlled item behaves exactly the same as if you are counting an item in a guided count.

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See [Guided Count Page](#) .

See [Guided Count: Add Item Page](#).

See [Guided Count - Add Item Page](#).

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## Performing Counts by Item in PeopleSoft Mobile Inventory Management

This section discusses how to:

- Define count by item search criteria.
- Add and count items for counts by item.

## Pages Used to Perform Counts by Item in PeopleSoft Mobile Inventory Management

Use these pages to perform counts by item.

| <i>Page Name</i>             | <i>Navigation</i>  | <i>Usage</i>                            |
|------------------------------|--|---|
| Count by Item                | Mobile Inventory, Count by Item                                    | Define count by item search criteria.   |
| Count by Item - Add Location | Mobile Inventory, Count by Item, and click the Add Location button | Add and count items for counts by item. |

## Count by Item Page

Use the Count by Item page to define count by item search criteria .

### Navigation

Mobile Inventory, Count by Item

### Image: Count by Item - Options page

This example illustrates the fields and controls on the Count by Item - Options page.

The screenshot shows the 'Count by Item' options page in a mobile application. At the top, there's a blue navigation bar with 'Mobile Inventory' and a 'Sign Out' link. Below this, the page title 'Count by Item' is centered. The main area contains several input fields and controls:

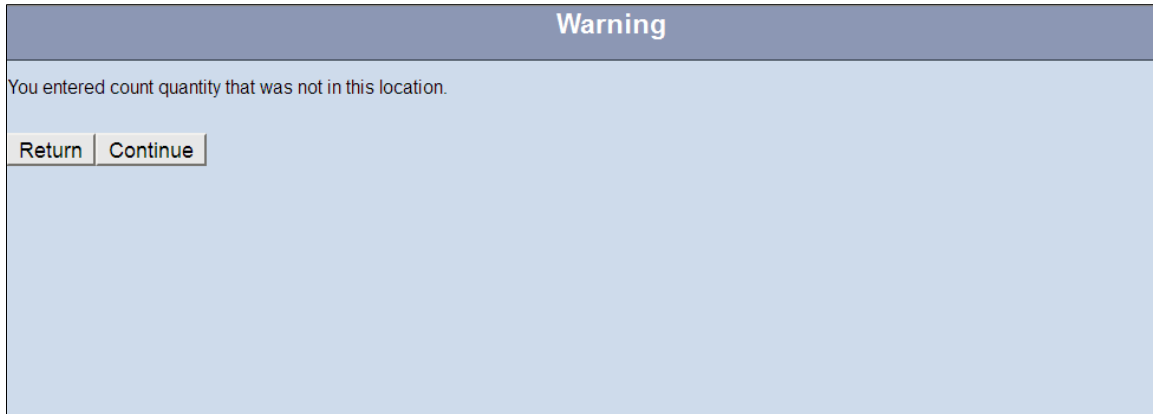
- Search Fields:** Three input fields labeled '\* Unit' (with 'US010' entered), 'Event', and 'Group'. Each has a magnifying glass icon to its right. A 'Search' button is positioned to the right of the 'Group' field.
- Selection Criteria:** A section with a dropdown arrow, currently expanded to show 'Count Item Statuses'.
- Count Item Statuses:** A list of checkboxes:
  - New
  - Counting
  - Qty Entered-Hold
  - Ready to Update
- Options:** A section with a dropdown arrow, currently expanded to show various display and sorting options:
  - Rows To Display:** A text input field containing '10'.
  - Sort By:** A dropdown menu showing 'Sort By Order Entered'.
  - Group By:** A dropdown menu showing 'Group By Item'.
  - Alternate Item Display:** A dropdown menu showing 'Item Only'.
  - Display Options (checkboxes):**
    - Display Lookups
    - Display Description
    - Display Filter
    - Display Prior Entry Caption
    - Display Show/Hide in tables
    - Pre-Load Serials
    - Enable Counting UOM
    - Filter All Alternate Items
    - Set Cursor on Filter Field

Use this page to search for items using a business unit, event, or group. To view additional search criteria, click the Selection Criteria link.

A warning message appears if you enter a count quantity for an item which is new to that location. You can choose to return to the current item or continue, add to list and proceed.

### Image: Count by Item — Warning page

This example illustrates the fields and controls on the Count by Item — Warning page.



The header section of the Count by Item page provides Lookup prompts for the unit, event and group. Click the Search button to initiate a search for matching items. The search is also initiated when you tab out of the Group field.

When you click the Selection Criteria link, you can select the count item statuses to include in the item search. The options that you select remain selected for this transaction until you return to the main menu. Then when you access the selection criteria again, the system provides the default values from PeopleSoft Inventory installation options and user preferences.

See [Count by Location Page](#).

Click the Options link to change processing and display options for counts by item. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

When you click the Search button, the system populates the Search Results table with the items that match the criteria you entered. The fields and processes on the Count by Item page are similar to the fields and processes on the Guided Count page. This section provides information unique to the Count by Location feature.

### Related Links

[Performing Guided Counts in PeopleSoft Mobile Inventory Management](#)

## Count by Item - Add Location Page

Use the Count by Item - Add Location page to add and count items for counts by item .

## Navigation

Mobile Inventory, Count by Item, and click the Add Location button

### Image: Count by Item - Add Location page

This example illustrates the fields and controls on the Count by Item - Add Location page.

Use this page count the items for a location. You can filter and select locations, items, containers, and storage and count units of measure. The filter feature is initiated by clicking the Filter button or tabbing out of the Filter field. The page functionality is similar to guided count pages except that you are not provided the items to count.

Use the arrow icons beneath the Filter field to skip between items that exist in the count event.

Click the Fetch button to retrieve the attributes for the entered item. The fetch is also initiated when you tab out of the Location field.

The difference between the count by item and count by location is that the system provides a unique list of items that exist in the count, and you then manually enter the locations and their counts for each item. Counting by item is a mixed approach between a guided count and a manual count.

---

**Note:** You can use the right and left arrow around the item number to navigate from one item to another and from one location to another.

---

See [Guided Count - Add Item Page](#).

After defining count information for the required fields for an item, click the Count button to add the item to the location count. The Count feature is also initiated when you tab out of the Count Qty field. As each item is added, the system provides a table with the last item that was counted. After all items have been added, you can select the Display All to view and item counts.

Click the Save button to add the item counts for the location to the PeopleSoft Inventory system. When you save the count, the system verifies the count data and displays any errors associated with the count. If errors occur, you need to resolve them and save the count again.

Click the Return to Search button to cancel any location counts that you've added and display the Count by Location page where you can define another search. The system displays the Save Warning page

indicating that you have unsaved data on the page. Click the Continue button to continue to the Search page, or click the Return button to go back to the count page and continue with the count by item.

After you have entered an item count, you can use the Display All link to update the count, count status, or delete the count before you save the count back to the PeopleSoft Inventory system.

---

**Note:** Counting a lot- or serial-controlled item behaves exactly the same as if you are counting an item in a guided count.

---

See [Guided Count: Add Item Page](#).

See [Guided Count - Add Item Page](#).

---

## Performing Manual Counts in PeopleSoft Mobile Inventory Management

This section discusses how to:

- Add an item to a manual count.
- Change manual count options.
- Display all items for a manual count.

## Pages Used to Perform Manual Counts in PeopleSoft Mobile Inventory Management

Use these pages to perform counts by item.

| <i>Page Name</i>           | <i>Navigation</i>  | <i>Usage</i>                          |
|----------------------------|--|---------------------------------------|
| Manual Count               | Mobile Inventory, Manual Count                                 | Add an item to a manual count.        |
| Manual Count (Options)     | Mobile Inventory, Manual Count, and click the Options link     | Change manual count options.          |
| Manual Count (Display All) | Mobile Inventory, Manual Count, and click the Display All link | Display all items for a manual count. |

### Manual Count - Add Item Page

Use the Manual Count - Add Item page to add an item to a manual count

## Navigation

Mobile Inventory, Manual Count

### Image: Manual Count page

This example illustrates the fields and controls on the Manual Count page.

Use this page to manually count items at a specific location and send the information back to the PeopleSoft Inventory system.

Click the Options link to view and update mobile device display options. Options for this page are initially defined using PeopleSoft installation options and user preferences options.

The fields and processes on the Manual Count page are similar to the fields and processes on the Guided Count page. This section provides information unique to the Manual Count feature

See [Performing Guided Counts in PeopleSoft Mobile Inventory Management](#).

To manually count an item:

1. Select the business unit, location, and item for the count. Click the Fetch button to retrieve the item attributes for the entered item. The fetch is also initiated when you tab out of the Item field.

This is required information for the page. After you count an item the system makes the Unit field unavailable. To change the business unit, save the count and then you can enter a different business unit.

2. Enter a count quantity.
3. Click the Count button or tab out of the Count Qty field to initiate the Count feature.

The system adds the item count and updates the Last Item Counted table. After defining all items for the count, you can review, update count quantities and delete items from the count using the Display All link.

4. Click the Save button.

To update a manual count that has been saved, you must use the Update Manual Count page within the PeopleSoft Inventory application.

**Image: Prior Entry section of the Manual Count page**

This example illustrates the fields and controls on the Prior Entry section of the Manual Count page.

The image shows a screenshot of the 'Prior Entry' section in a software application. At the top left, it says 'Prior Entry'. To the right of this is a 'Modify' button and a red 'X' icon. Below these are several fields: 'Unit US010', 'Location AREA2\1\1', 'Item 10003' with a dropdown arrow, and a description 'Long Sleeve Biking Jersey, Women's'. Further down are 'Count Qty 25 EA', 'Stor UOM EA', and 'Count Status Ready to Update'.

---

**Note:** Counting a lot- or serial-controlled item behaves exactly the same as if counting an item in a guided count. For more information about counting a lot- or serial-controlled item, see the "Adding Lot-Controlled Items to Guided Counts" or "Adding Serial-Controlled Items to Guided Counts" sections.

---

You use manual count to manually count items at a location and send the information back to the PeopleSoft Inventory system.

## Manual Count - Options Page

Use the Manual Count - Options page to change manual count options

## Navigation

Mobile Inventory, Manual Count, and click the Options link

### Image: Manual Count - Options page

This example illustrates the fields and controls on the Manual Count - Options page.

The screenshot shows the 'Manual Count' options page in the 'Mobile Inventory' application. The page title is 'Manual Count' and it includes a 'Sign Out' link. The configuration options are as follows:

- Rows To Display:** 10
- Sort By:** Sort By Location
- Group By:** Group By Location
- Alternate Item Display:** Item Only
- Display Lookups
- Display Description
- Display Filter
- Display Prior Entry Caption
- Display Show/Hide in tables
- Enable Counting UOM
- Filter All Alternate Items

Buttons at the bottom: Return, Cancel

Use this page to change processing and display options for manual counts. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

## Manual Count Display All Page

Use the Manual Count display all page to display all items for a manual count.

### Navigation

Mobile Inventory, Manual Count, and click the Display All link

#### Image: Manual Count page with Display All selected (1 of 2)

This example illustrates the fields and controls on the Manual Count page with Display All selected (1 of 2).

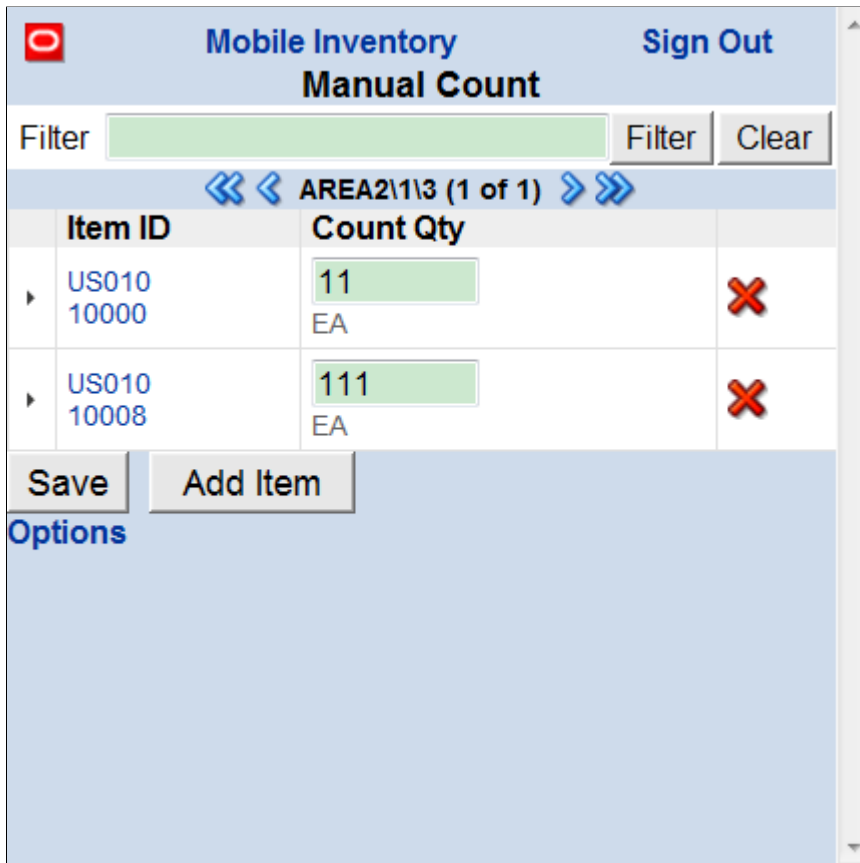
The screenshot shows the 'Mobile Inventory Manual Count' interface. At the top, there is a header with a red camera icon, the title 'Mobile Inventory Manual Count', and a 'Sign Out' button. Below the header is a filter section with a text input field, a 'Filter' button, and a 'Clear' button. A navigation bar shows 'AREA2\1\3 (1 of 1)' with left and right arrow buttons. The main content is a table with two columns: 'Item ID' and 'Count Qty'. The table contains three rows of data, each with a red 'X' icon in the right margin. The first row has Item ID 'US010 10000' and Count Qty '11'. The second row has Item ID 'US010 10008' and Count Qty '111'. The third row has Item ID 'US010 10011' and Count Qty '111'. Below the table, there is a text label 'Switchback Mt. Biking Shorts, Women's' and 'Stor UOM EA'. At the bottom, there are 'Save' and 'Add Item' buttons, and an 'Options' link.

| Item ID        | Count Qty |   |
|----------------|-----------|---|
| US010<br>10000 | 11<br>EA  | X |
| US010<br>10008 | 111<br>EA | X |
| US010<br>10011 | 111<br>EA | X |

The above page used the group by location feature on the Manual Count-Options page (the *Group By Location* option in the Group By field).

**Image: Manual Count page with Display All selected (2 of 2)**

This example illustrates the fields and controls on the Manual Count page with Display All selected (2 of 2).



The above page used the group by item feature on the Manual Count-Options page (the *Group By Item* option in the Group By field).

You use this page to view all items that have been selected for a manual count. When you work with a list of items you can review items and their locations that will be counted when you save the count.

You can also view additional item details, update item counts, and delete items from the count. In addition, you can click on the Business Unit or Location links for an item to access and update that item. This is useful when you are updating a serial-controlled item.

Click the Save button to save the count to the PeopleSoft Inventory system.

**Related Links**

[Guided Count Display All Page](#)

## Chapter 9

# Using Mobile Express Issue

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## Understanding Express Issue Using PeopleSoft Mobile Inventory Management

Mobile Inventory supports an internal express issue where you create an internal order online and reserve, pick, and ship the stock in one step. Internal orders are orders for a department or location within an organization. The mobile Express Issue task flow leverages the functionality of the Express Issue component in PeopleSoft Inventory.

Errors returned by the component interface display on the mobile device, but warnings and informational messages are not displayed. The express issue transaction is not meant for entering a high number of receipts in a single transaction.

See "Creating Online Orders Using Express Issue in PeopleSoft Inventory (*PeopleSoft FSCM 9.2: Inventory*)".

To perform an internal express issue using a mobile device:

1. On the PeopleSoft Mobile Inventory Management menu, select the Express Issue task flow.
2. Use the Express Issue page to initiate an internal express issue by defining the business unit, order number, location and issue quantity.
3. After entering issue information, click the Add Line button to add the line to the express issue.

The system adds the line, updates the Line Selection table with the next line number. If you have selected the Prior Entry Caption in the Options page, then the system displays your last transaction in the Prior Entry box at the bottom of the page.

4. After adding the line, click the Save button.

The system displays the Issue Created page. The page displays the business unit, the new order number, the new shipping ID, and whether the Inventory Depletion process has been scheduled and its process instance number.

5. Click the OK button on the Issue Created page.

The system processes the internal express issue and updates the PeopleSoft Inventory system with the order that you just created.

Transaction lines on the mobile device are available for update until you save the transaction. When you save the transaction, the device sends the information to the Component Interface, which formats the data for processing by the PeopleSoft Inventory system Express Issue component. The interface sends any error messages issued by the PeopleSoft Express Issue component back to the mobile device.

Lot and serial transactions are not currently supported by the Express Issue task flow transactions.

If an entry results in a negative inventory situation, and negative inventory is not allowed for the business unit, an error displays. If negative inventory is allowed, the system does not issue a message and saves the transaction.

After you save the transaction, the system:

- Displays a message on the device with the new order number.
- Displays a message indicating that the Inventory Depletion process has been scheduled and its process instance number, if the system has been set up to submit the depletions at save time.
- Displays the Express Issue page for input of a new transaction.

---

## Setting Up the PeopleSoft System for Mobile Express Issue

When you use Mobile Inventory to perform internal express issues, you use information that has been established in the PeopleSoft Inventory system. This section discusses how to:

- Define express issue installation options.
- Setup express issue user preferences.

### Pages Used to Set Up the PeopleSoft System for Mobile Express Issue

| <i>Page Name</i>                              | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---|------------------------|--|--|
| Installation Options - Mobile Inventory       | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, and select the Express Issue task flow                          | Define express issue installation options.   |
| User Preferences - Mobile Inventory           | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Mobile Inventory, and select the Express Issue task flow | Set up express issue user preferences.   |
| Define User Preferences - Overall Preferences | OPR_DEF_TABLE_FS1      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Overall Preferences             | Use the Business Unit field to define the default Inventory business unit used on the Express Issue page.  |
| Setup Component Interfaces                    | MIN_CMPINTFC           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Component Interfaces                                  | Define the component interface for the Express Issue mobile page.  |
| Setup Mobile Services                         | MIN_SERVICES           | Set Up Financials/Supply Chain, Product Related, Inventory Mobile, Setup Mobile Services                                       | Identify and setup the PeopleSoft Integration Broker services to be used with the Express Issue task flow. |

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define express issue installation options.

### Navigation

Set Up Financials/Supply Chain, Install, Installation Options, and select the Express Issue task flow

### Image: Installation Options - Mobile Inventory: Express Issue task flow page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory: Express Issue task flow page . You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It is divided into two main sections: 'System Options' and 'Task Options'.

**System Options:**

- Key Concatenation Separator: \
- Role Name: MIN User
- Delivery Signature Required

**Task Options:**

- 'Task Flow: Express Issue
- Rows Displayed: 10
- Alternate Item Display: Item as Primary
- Display Lookups
- Display Description
- Collapse Header
- Display Filter Related Fields
- Display Prior Entry Caption
- Display Show/Hide in tables
- Default Stocking UOM
- Filter All Alternate Items

Navigation controls at the top right of the Task Options section include: Find | View All | First 11 of 15 | Last.

You use installation options to define default values for Mobile Express Issue pages in the PeopleSoft system and to control the behavior of the transaction.

### Task Flow

Identifies the Mobile Inventory Management task flow that uses the settings on this page. Enter the value of Express Issue to define installation-level options for the Express Issue page.

### Rows Displayed

Enter the maximum number of items to display on the Express Issue page. You can update this value using the Options table on the Express Issue page.

### Display Lookups

Select to display the Lookup icon for the fields on the Express Issue page. The Lookup icon enables you to view a list of values and select one.

### Alternate Item Display

Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: *Alternate Only*, *Alternate as Primary*, *Item Only*, and *Item as Primary*.

For more information about alternate items:

See [Setting Up Alternative Item Identifiers](#).

|  |  |
|--|--|
| <b>Display Description</b>                                     | Select to display the item descriptions on the Express Issues page when using a mobile device.   |
| <b>Collapse Header</b>   | Select to indicate that the header should be collapsed. You can also change the setting using the Options table on the Express Issue page.   |
| <b>Display Filter Related Fields</b>                           | Select this check box to display the Filter field and Filter button on the Express Issue page. Deselect this check box to remove the filter functionality from the pages.  |
| <b>Display Prior Entry Caption</b>                             | Select this check box to display your last transaction in the Prior Entry box when you are adding items for an express issue.  |
| <b>Display Show/Hide in tables</b>                             | Select to display the Show and Hide options for express issue pages. The options make it possible for you to expand and collapse extra line information in tables.   |
| <b>Default Stocking UOM (default stocking unit of measure)</b> | Select to display the unit of measure used to as the stocking unit of measure. When you select the check box, the Default Stocking UOM field appears on the Express Issue page. You can use the Options link on that page to change the setting.   |
| <b>Filter All Alternate Items</b>                              | <p>Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID ( MASTER_ITEM_TBL) that matches the alternate is shown in the table.</p> <p>Deselect to indicate that the system should not use alternate item identifiers to filter the table. This can improve system performance for the task flow.</p> |

See [Installation Options - Mobile Inventory Page](#).

## Express Issue Details Page

Use the Express Issue Details page to set up express issue user preferences

### Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Mobile Inventory, and select the Express Issue task flow

The values on this page are the same as those on the installation options page. Select the Use Installation Values check box to apply the values from the Installation Options – Mobile Inventory page for the Express Issue task flow. When you click the check box, the display options on this page are no longer available.

See [Installation Options - Mobile Inventory Page](#).

## Processing Internal Express Issues on a Mobile Device

This section discusses how to:

- Enter header information for an internal express issue.
- Define line information for an internal express issue.
- View multiple lines in an internal express issue.
- Update express issue options.

### Pages Used to Process Internal Express Issues on a Mobile Device

Use these pages to process express issues.

| <b>Page Name</b>                    | <b>Navigation</b>   | <b>Usage</b>                                    |
|-------------------------------------|---|---|
| Express Issue                       | Mobile Inventory, Express Issue, and click the Header Expand button | Enter header internal express issue.            |
| Express Issue with line information | Mobile Inventory, Express Issue, and collapse the header            | Define line information for express issues.     |
| Express Issue with display all view | Mobile Inventory, Express Issue, and click the Display All link.    | View multiple lines on the express issue order. |
| Express Issue with options          | Mobile Inventory, Internal Issue, and click the Options link        | Update express issue options.                   |

### Express Issue Page

Use the Express Issue page with header information to enter header internal express issue

## Navigation

Mobile Inventory, Express Issue, and click the Header Expand button

### Image: Express Issue - Header page with header information

This example illustrates the fields and controls on the Express Issue - Header page with header information. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Express Issue' header page in the 'Mobile Inventory' system. The page has a blue header bar with the 'Express Issue' title and a 'Sign Out' button. Below the header, there are three tabs: 'Header' (selected), 'Options', and 'Display All'. The 'Header' tab contains several input fields with magnifying glass icons for lookup: 'Unit' (value: US010), 'Order' (value: NEXT), 'Location' (value: JS010), 'Dist Type' (value: 14000), 'Ovrd GL', 'Ship To' (value: USA - Phoenix), and 'Sold To'. At the bottom, there is a checked checkbox labeled 'Use Default Location'.

When you access the Express Issue page, the system provides default values from the PeopleSoft Inventory system installation or user preferences set up pages. To view all of the default settings, click the Options link.

**Note:** If the header is collapsed when you access the Express Issue page, click the Expand icon to view header information.

Use the Express Issue page to initiate an internal express issue. Depending on how user preferences and installation options are defined for the Express Issue task flow, the header can display as collapsed or expanded. Click the Collapse header icon if you want to close the Header table. After you add an item to the issue, the Prior Entry table appears on the page for informational purposes.

### Unit

Displays the default business unit established for the user. You can select another business unit in which to create an internal express issue. After you enter add a line, the Business Unit field becomes a display only field.



### Lookup icon

Click the Lookup icon to access the Look Up Business Unit page where you can search for a business unit.

### Order

Enter an order number. If you're using autonumbering, the order number is either NEXT or the starting sequence that you entered. The combination of inventory business unit, demand source, source business unit, and order number will identify a specific order in fulfillment.

### Location

Displays the location associated with the user's default business unit as defined in the PeopleSoft Inventory user preferences.

|                                      |   |
|--------------------------------------|---|
|                                      | If you change the business unit in the header information, the system changes the location to that business unit's location.  |
| <b>Dist Type (distribution type)</b> | Displays the distribution type if a default value is available. The distribution type is based on the transaction type. You can override the value.   |
| <b>Ovrd GL</b>                       | If this is an interunit expensed issue, you can enter a new General Ledger business unit against which the transaction is costed.<br><br>The system validates the destination business unit's ChartFields against the new value and costs the issue using the defined interunit transfer price.   |
| <b>Ship To(ship to customer)</b>     | Enter a ship-to customer.   |
| <b>Sold To (sold to customer)</b>    | Enter a sold-to customer. The field is used with the Ship To Cust field to define the correct shipping information.   |
| <b>Use Default Location</b>          | Select this check box to enable the system to select a Storage Location field value when you do not enter a value. The system attempts to pick from the item's default putaway location.  |
| <b>Options</b>                       | Click this link to access the display options that you can define for use with Express Issue pages. The values for express issue options are initially set using the installation values or user preferences. You can update the values.<br><br>The system immediately applies your selections when you return to this page.<br><br>See <a href="#">Express Issue with Options Page</a> . |
| <b>Display All</b>                   | Click this link to access the Express Issue display all page where you can view multiple order lines together.  |

## Express Issue Page

Use the Express Issue page with line information to define line information for express issues.

## Navigation

Mobile Inventory, Express Issue, and collapse the header

### Image: Express Issue page with line information

This example illustrates the fields and controls on the Express Issue page with line information. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Express Issue' page in the 'Mobile Inventory' application. The page has a blue header with 'Mobile Inventory' and 'Express Issue' text, and a 'Sign Out' button. Below the header, there are navigation links: 'US010 \ NEXT', 'Options', and 'Display All'. The main form area contains several input fields and buttons:

- Dist Type**: A text input field with a magnifying glass icon.
- Item**: A text input field containing '10002', followed by a 'Fetch' button and a magnifying glass icon.
- Stor Loc**: A text input field containing 'AREA2\1\1' with a magnifying glass icon.
- UOM**: A text input field containing 'EA' with a magnifying glass icon.
- Qty**: A text input field containing '1', followed by an 'Add Line' button.

At the bottom of the form, there is a 'Save' button and a section for 'Prior Entry' with fields for 'Stor Loc' and 'Qty'.

Use the Line Information table to enter express issue order and item information.

#### Dist Type (distribution type)

Enter a distribution type if you want to override the distribution type header-level value, otherwise, the system automatically tabs past this field. If a distribution type value does not exist in the header, this field appears blank.

#### Item

Select or enter an item ID for which you want to create an internal express issue.

The item's description appears below the item. When you deselect the Display Description check box, the item's description does not appear. Also, if an item's description is blank, a description does not appear.

After entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.

See [Setting Up Alternative Item Identifiers](#).

#### Fetch

Click this button to retrieve the item that you entered. When you click Fetch, the system verifies the item ID and refreshes the page and updates the item description. The fetch feature is also initiated when you tab out of the Item ID field.

The item's appropriate default unit of measure and default putaway storage location will also be updated when you click

the Fetch button. And, if the Display Description check box is selected the description will be updated.

 **(Lookup icon)**

Click the Lookup icon to access the Look Up Item ID page where you can locate and select an item to include in the express issue.

**Serial**

Select or enter a serial ID for which you want to create an internal express issue.

---

**Note:** This field is only available for serial, or serial and lot controlled items.

---

Once you enter an item, the serial ID displays on page and the lot ID defaults automatically if applicable.

**Lot**

Select or enter a lot ID for which you want to create an internal express issue.

---

**Note:** This field is only available for lot, or serial and lot controlled items.

---

Once you enter an item, the lot ID displays on page or the serial ID displays on page and lot ID defaults automatically as applicable to the item.

**Stor Loc (storage location)**

Enter a storage location or use the Lookup icon to select a location. You can select different storage locations for an express issue. This is a required field.

**UOM (unit of measure)**

Enter the unit of measure for the item that is being express issued. The system populates this field with the standard UOM if a standard UOM is defined for the item and storage location. You can change the value in this field by entering a new value or using the lookup icon.

**Qty**

Enter the amount that you want to issue.

**Add Line**

Click to add another item to this express issue. When you click the button, the system verifies and adds the current item to the internal issue, updates the Prior Entry table with the current item, and displays a new page where you can enter another item ID to this order. The Add Line feature is also initiated when you tab out of the Qty field.

When adding a line with the same item as the previous line, the previous UOM and storage location are automatically applied as default values to the new line.

See *PeopleSoft Mobile Inventory Management, Using Mobile Express Issue, Processing Internal Express Issues on a Mobile Device, Adding Lines to Express Issues*

**Save**

Click to save the current express issue transaction. An order number is assigned and the page is refreshed for you next order. Once an order has been saved, you cannot change the order since it has already started the shipping process in PeopleSoft Inventory.

**Prior Entry (group box)**

The Prior Entry group box displays information about the last order line entered into this order when you clicked the Add Line button. The line information includes the item ID, quantity ordered, item description, order line number, and picking storage location. Use the Modify button to retrieve this line and edit the information. Click the Delete icon to remove this line from the order.

**Express Issue Display All Page**

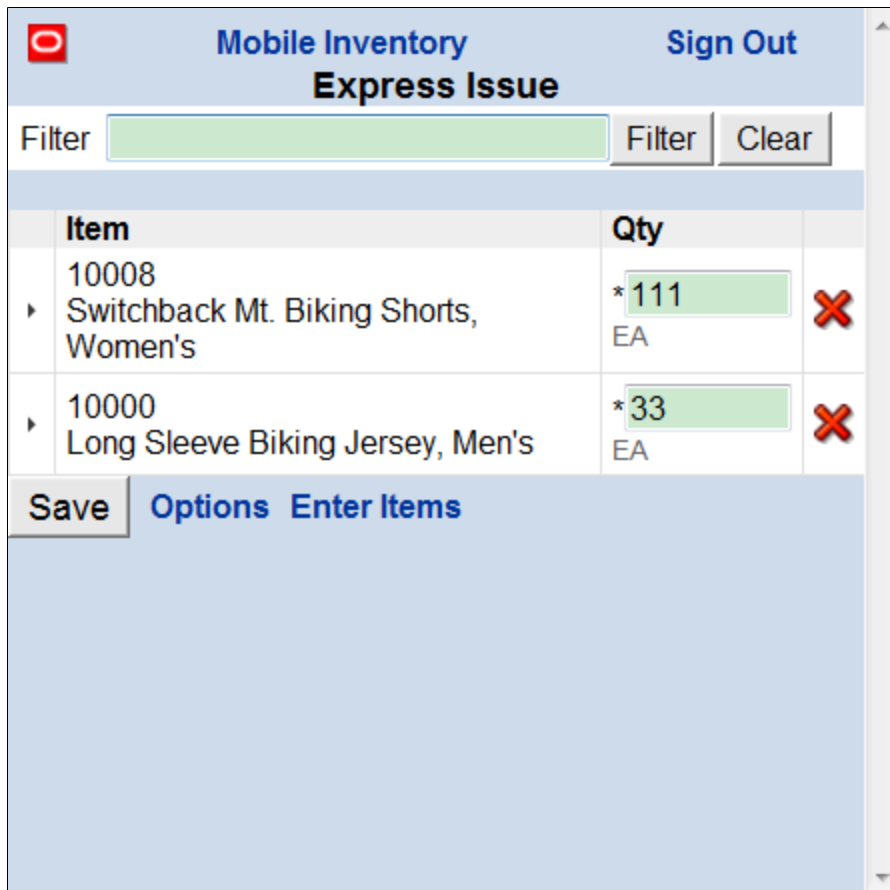
Use the Express Issue display all page to view multiple lines on the express issue order .

**Navigation**

Mobile Inventory, Express Issue, and click the Display All link.

**Image: Express Issue page when the Display All link is selected**

This example illustrates the fields and controls on the Express Issue page when the Display All link is selected. You can find definitions for the fields and controls later on this page.



Use this page to view and work with multiple order lines within your express issue order. The order quantity for a line can be changed on this page.

**Expand**

Click to view additional line details, including the order line number and the picking storage location.

**Delete**

Click to delete the item from the express issue.

**Save**

Click to submit your express issue order

**Enter Items**

Click to return to the primary Express Issue page.

**Express Issue with Options Page**

Use the Express Issue with Options page to update express issue options .

## Navigation

Mobile Inventory, Internal Issue, and click the Options link

### Image: Express Issue - Options page

This example illustrates the fields and controls on the Express Issue - Options page.

You use the Express Issues options page to update the display values for Express Issue task flow pages. The page initially appears with the default settings from the PeopleSoft system installation options or user preference settings.

You can select or deselect the check boxes as needed. Upon completing the current session using the Express Issue task flow and exiting the page, any updates that you make to the options are replaced by the system-defined options. When you select or deselect a check box, the update goes into effect immediately when you click the Return button.

To not make any updates that you may have selected or deselected, click the Cancel button. The system returns to the Express Issue page without applying the changes.

## Related Links

[Installation Options - Mobile Inventory Page](#)

## Express Issue ChartFields Overrides Page

Use the Express Issue ChartField Overrides page to enter appropriate chartfield values.

### Navigation

Mobile Inventory, Express Issue, and click the ChartField Overrides link

The system validates chartfield values once you enter values and click the OK button. The Override GL business unit then, also becomes the associated driving value.

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**Note:** ChartField values entered at the header level are applicable across all the lines in the express issue.

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## Chapter 10

# Using Mobile Inventory Adjustments

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## Setting Up Options for the Adjustment Task Flow

This section discusses how to:

- Define installation options for adjustments.
- Define user preferences for adjustments.

## Pages Used to Set up Options for the Adjustment Task Flow

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|---|------------------------|--|---|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select Adjustment in the Task Flow field.               | Define installation options for the adjustment task flow. |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, Define User Preferences, Mobile Inventory. Select Adjustment in the Task Flow field. | Define user preferences for the adjustment task flow.     |

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define installation options for the adjustment task flow.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select Adjustment in the Task Flow field.

### Image: Installation Options - Mobile Inventory page for the Adjustments task flow

This example illustrates the fields and controls on the Installation Options - Mobile Inventory page for the Adjustments task flow. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It has two main sections: 'System Options' and 'Task Options'.  
 In 'System Options':  
 - 'Key Concatenation Separator' is an empty text field.  
 - 'Role Name' is a text field containing 'MIN User' with a search icon.  
 - 'Delivery Signature Required' is a checked checkbox.  
 In 'Task Options':  
 - '\*Task Flow' is a dropdown menu set to 'Adjustments'.  
 - 'Alternate Item Display' is a dropdown menu set to 'Item Only'.  
 - There are four checked checkboxes: 'Display Lookups', 'Entry UOM Enabled', 'Default Stocking UOM', and 'Filter All Alternate Items'.  
 - 'Adjustment Type' is a dropdown menu set to 'Scrap'.  
 At the top right of the 'Task Options' section, there are navigation links: 'Find | View All', 'First', '14 of 15', and 'Last'.

Use this page to set up default options for adjustments at the installation level for mobile devices.

### Alternate Item Display

Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: *Alternate Only*, *Alternate as Primary*, *Item Only*, and *Item as Primary*.

For more information about alternate items:

See [Setting Up Alternative Item Identifiers](#).

### Display Lookups

Select this check box to indicate that Lookup icons for fields in this task flow are to be displayed on the Mobile Inventory - Adjustments page. The Lookup icon enables you to view a list of values and select one.

### Entry UOM Enabled (entry unit of measure enabled)

Select this check box to indicate that the Entry UOM field is to be displayed on the Mobile Inventory - Adjustments page.

### Default Stocking UOM

Select this check box to indicate that when item information is returned on the Mobile Inventory - Adjustments page, the default stocking UOM is to be used as the default UOM for the item, instead of the standard UOM.

### Filter All Alternate Items

Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID (MASTER\_ITEM\_TBL) that matches the alternate is shown in the table.

Deselect to indicate that only the item ID is to be used for filtering, which also improves system performance.

## User Preferences - Mobile Inventory Page

Use the User Preferences - Mobile Inventory page to define user preferences for the adjustment task flow

### Navigation

Set Up Financials/Supply Chain, Common Definitions, Define User Preferences, Mobile Inventory. Select Adjustment in the Task Flow field.

Use this page to define adjustment options for an individual user. The fields on this page are the same as the Installation Options - Mobile Inventory page for the same task flow. This page is optional; the Installation Options - Mobile Inventory page for the same task flow is used when a user ID does not have this page defined or when the Use Installation Values check box is selected.

See [Installation Options - Mobile Inventory Page](#).

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## Performing Inventory Adjustments

This section discusses how to:

- Perform inventory adjustments.
- Change adjustment options for the session.

## Pages Used to Perform Inventory Adjustments

Use these pages to perform inventory adjustments:

| <b>Page Name</b>    | <b>Navigation</b>                                      | <b>Usage</b>                               |
|---------------------|--|--|
| Adjustments         | Mobile Inventory, Adjustments                          | Perform inventory adjustments.             |
| Adjustment: Options | Mobile Inventory, Adjustments. Click the Options link. | Change adjustment options for the session. |

## Adjustments Page

Use the Adjustments page to perform inventory adjustments

## Navigation

Mobile Inventory, Adjustments

### Image: Adjustments page

This example illustrates the fields and controls on the Adjustments page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Mobile Inventory Adjustments' page. The header includes a red circle icon, the title 'Mobile Inventory Adjustments', and a 'Sign Out' link. The main content area is divided into sections: 'Options' with fields for Unit (US010), Adj Type (Misc Issue), Stor Loc, Item, and Stor UOM; 'Qty Available' with fields for Qty, Dist Type, and Reason; and a 'Comments' field. Each field has a search icon, and the Item and Stor UOM fields have a 'Fetch' button. A 'Save' button is located at the bottom left.

#### Options

Click to access the Options page.

#### Unit

Enter the business unit for which the item belongs. The system automatically displays the default business unit from the operator ID, but it can be changed.

#### Adj Type (adjustment type)

Enter or select an adjustment type. Valid values include:

- *Decrease* (decrease inventory stock quantity)
- *Increase* (increase inventory stock quantity) When you increase inventory stock using this adjustment type, the new quantity is costed using the Default Actual Cost field on the Define Business Unit Item - General: Common page.
- *Misc Issue* (miscellaneous issue)
- *Misc Return* (miscellaneous return)
- *Scrap* (destroy inventory stock quantity)

#### Stor Loc (storage location)

Enter or search for a valid storage location for the item.

#### Item

Enter the item to which you want to adjust for the business unit. After the Unit and Item Id fields are entered, you can click the Fetch button to display the description, Alternate Item, and Mfg Item fields.

If entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.

See [Setting Up Alternative Item Identifiers](#).

### **Serial ID**

Enter or search for a serial ID for serial-controlled items.

---

**Note:** This field is only available for serial, or serial and lot controlled items.

---

Once you enter an item, the serial ID displays on page and the lot ID defaults automatically if applicable.

### **Lot ID**

Enter or search for a lot ID for lot-controlled items.

---

**Note:** This field is only available for lot , or serial and lot controlled items.

---

Once you enter an item, the lot ID displays on page or the serial ID displays on page and lot ID defaults automatically as applicable to the item.

### **Stor UOM (storage unit of measure)**

Change or search for the UOM for which the item is stored in the business unit. This is the transaction unit of measure or the unit of measure for the physical storage location. This value automatically defaults when you tab out of the Item field or click the Fetch button.

The system displays the default stocking UOM if the Default Stocking UOM check box is selected on the Installation Options - Mobile Inventory page (or the User Preferences - Mobile Inventory page) for the adjustments task flow.

The unit of measure that is displayed to the right of the Qty ( quantity) field defaults to this value unless you enter a value in the Entry UOM field.

When you click the Fetch button next to this field, the system automatically displays the quantity available for the item in the Qty Available field, within the selected storage location.

### **Qty Available (quantity available)**

View the quantity of the available quantity within the storage location selected. This is a display only field.

### **Entry UOM (entry unit of measure)**

Change or search for the UOM for which you want to enter the quantity in the Qty field. This field defaults to the storage UOM and is used to change the UOM for the adjustment transaction for only this session. This field enables you to enter the adjustment quantity in a different unit of measure than the actual transaction UOM (storage UOM).

This field displays only when the Entry UOM Enabled field is selected on the Installation Options - Mobile Inventory page (or the User Preferences - Mobile Inventory page) for the task flow.

**Qty (quantity)**

Enter a positive number. The option in the Adjust Type field determines whether the system increases or decreases the quantity

**Dist Type (distribution type)**

Enter or search for a valid distribution type. The selected distribution type is validated when you save.

If you leave this field blank, then the system uses the default distribution type that is defined for the business unit when the Mobile Adjustment page is saved.

**Reason**

Enter or select a valid reason code. This field defines the need for the adjustment. Reason codes are defined on the Reason Code page.

**Comments**

Enter a comment using up to 254 characters for the adjustment transaction. Comments are written to the TRANSACTION\_INV table.

**Save**

Click to save the adjustment. The system performs validations on the transaction. If there are no errors, the system displays a confirmation message. If an error occurs, the system displays an error message allowing you to correct the error and save again.

## Adjustment: Options Page

Use the Adjustment: Options page to change adjustment options for the session

**Navigation**

Mobile Inventory, Adjustments. Click the Options link.

**Image: Adjustment: Options page**

This example illustrates the fields and controls on the Adjustment: Options page.

The screenshot shows the 'Mobile Inventory Adjustments' options page. At the top, there is a navigation bar with a red home icon, the text 'Mobile Inventory Adjustments', and a 'Sign Out' link. Below this, the 'Adj Type' dropdown is set to 'Misc Issue'. The 'Alternate Item Display' dropdown is set to 'Item as Primary'. There are four checkboxes: 'Display Lookups' (checked), 'Enable Entry UOM' (unchecked), 'Default Stocking UOM' (checked), and 'Filter All Alternate Items' (unchecked). At the bottom, there are 'Return' and 'Cancel' buttons.

Use this page to change processing and display options for adjustments . The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

To save changes, click the Return button.



## Chapter 11

# Using Mobile Inventory to Move Stock

---

## Setting Up Options for Bin to Bin Transfers

This section discusses how to:

- Define installation options for bin to bin transfers.
- Define user preferences for bin to bin transfers.

## Pages Used to Set up Options for Bin to Bin Transfers

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---|------------------------|---|--|
| Installation Options - Mobile Inventory | INSTALLATION_MIN       | Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select Bin to Bin Transfer in the Task Flow field.                                 | Define installation options for the bin to bin transfer task flow. |
| User Preferences - Mobile Inventory     | MIN_USER_TASK_OPT      | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory. Select Bin to Bin Transfer in the Task Flow field. | Define user preferences for the bin to bin transfer task flow.     |

## Installation Options - Mobile Inventory Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN) to define installation options for the bin to bin transfer task flow.

## Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Mobile Inventory. Select Bin to Bin Transfer in the Task Flow field.

### Image: Installation Options - Mobile Inventory page (Bin to Bin Transfer task flow)

This example illustrates the fields and controls on the Installation Options - Mobile Inventory page (Bin to Bin Transfer task flow). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Mobile Inventory' page. It is divided into two main sections: 'System Options' and 'Task Options'.  
 In the 'System Options' section, there is a 'Key Concatenation Separator' field with a backslash character, a 'Role Name' field with 'MIN User', and a checked checkbox for 'Delivery Signature Required'.  
 The 'Task Options' section is titled 'Bin to Bin Transfer' and includes a 'Task Flow' dropdown menu set to 'Bin to Bin Transfer', an 'Alternate Item Display' dropdown menu set to 'Alternate as Primary', and four checked checkboxes: 'Display Lookups', 'Entry UOM Enabled', 'Default Stocking UOM', and 'Filter All Alternate Items'. Navigation links for 'Find', 'View All', 'First', '12 of 15', and 'Last' are visible in the top right of the Task Options section.

Use this page to set up default options for bin to bin transfers at the installation level for mobile devices.

### Alternate Item Display

Select an option that indicates how an item, alternate item, or both are displayed when an alternate item is specified for the transaction. Options include: *Alternate Only*, *Alternate as Primary*, *Item Only*, and *Item as Primary*.

For more information about alternate items:

See [Setting Up Alternative Item Identifiers](#).

### Display Lookups

Select this check box to indicate that Lookup icons for fields in this task flow are to be displayed on the Mobile Inventory - Bin to Bin Transfer page. The Lookup icon enables you to view a list of values and select one.

### Entry UOM Enabled (entry unit of measure enabled)

Select this check box to indicate that the Entry UOM field is to be displayed on the Mobile Inventory - Bin to Bin Transfer page. If this option is not selected, you can only use the Stor UOM (storage unit of measure) field on the Mobile Inventory - Bin to Bin Transfer page.

### Default Stocking UOM (default stocking unit of measure)

Select this check box to indicate that when item information is returned on the Mobile Inventory - Bin to Bin Transfer page, the default stocking UOM is to be used as the default UOM for the item, instead of the standard UOM.

### Filter All Alternate Items

Select to indicate that you want the system to search through all possible alternate items when filtering a table. If an alternate item identifier is entered in the Filter field, the item ID (

MASTER\_ITEM\_TBL) that matches the alternate is shown in the table.

Deselect to indicate that only the item ID is to be used for filtering, which also improves system performance.

## Defining User Preferences for Bin to Bin Transfers

Use the User Preferences - Mobile Inventory page (MIN\_USER\_TASK\_OPT) to define user preferences for the bin to bin transfer task flow.

### Navigation

Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Mobile Inventory. Select Bin to Bin Transfer in the Task Flow field.

Use this page to define bin to bin transfer options for an individual user. The fields on this page are the same as the Installation Options - Mobile Inventory page for the same task flow. This page is optional; the Installation Options - Mobile Inventory page for the same task flow is used when a user ID does not have this page defined or when the Use Installation Values check box is selected.

See [Installation Options - Mobile Inventory Page](#).

## Transferring Stock Using a Mobile Device

This section discusses how to:

- Transfer stock using a mobile device.
- Change transfer options for the session.

## Pages Used to Transfer Stock Using a Mobile Device

Use these pages to transfer stock using a mobile device:

| <b>Page Name</b>             | <b>Navigation</b>  | <b>Usage</b>                             |
|------------------------------|--|--|
| Bin to Bin Transfer          | Mobile Inventory, Bin to Bin Transfer                          | Transfer stock using a mobile device.    |
| Bin to Bin Transfer: Options | Mobile Inventory, Bin to Bin Transfer. Click the Options link. | Change transfer options for the session. |

## Bin to Bin Transfer Page

Use the Bin to Bin Transfer page to transfer stock using a mobile device

## Navigation

Mobile Inventory, Bin to Bin Transfer

### Image: Bin to Bin Transfer page

This example illustrates the fields and controls on the Bin to Bin Transfer page. You can find definitions for the fields and controls later on this page.

Use this page to transfer stock from one storage location to another, using a mobile device.

### Options

Click to access the bin to bin transfer options that were defined on the Installation Options - Mobile Inventory page (or the User Preferences - Mobile Inventory page) for the task flow.

If you change any of these options, the change is valid for only this session.

### Location

Enter the storage location from which you want to transfer items.

### Item

Enter the item that you want to transfer to another location within the business unit.

If entering an alternate identifier in this field, the system may change the value depending on the option selected in the Alternate Item Display field on the Options page for the task flow.

The item description displays below this field when the system fetches the item information.

See [Setting Up Alternative Item Identifiers](#).

### Serial ID

Enter or search for a serial ID for serial-controlled items.

---

**Note:** This field is only available for serial, or serial and lot controlled items.

---

Once you enter an item, the serial ID displays on page and the lot ID defaults automatically if applicable.

**Lot**

Enter or select the lot ID for lot controlled items.

---

**Note:** This field is only available for lot , or serial and lot controlled items.

---

Once you enter an item, the lot ID displays on page or the serial ID displays on page and lot ID defaults automatically as applicable to the item.

**Stor UOM (storage unit of measure)**

Change or search for the UOM for which the item is stored in the business unit. This is the transaction unit of measure or the unit of measure for the physical storage location. This value automatically appears when you tab out of the Item field or click the Fetch button.

The system displays the default stocking UOM if the Default Stocking UOM check box is selected on the Installation Options - Mobile Inventory page (or the User Preferences - Mobile Inventory page) for the bin to bin transfer task flow.

The unit of measure that is displayed to the right of the Qty ( quantity) field defaults to this value unless you enter a value in the Entry UOM field.

See [Setting Up Options for Bin to Bin Transfers](#).

**Entry UOM (entry unit of measure)**

Change or search for the UOM for which you want to enter the quantity in the Qty field. This field defaults to the storage UOM and is used to change the UOM for the transfer transaction for only this session. This field enables you to enter the transfer quantity in a different unit of measure than the actual transaction UOM (storage UOM).

This field displays only when the Entry UOM Enabled field is selected on the Installation Options - Mobile Inventory page (or the User Preferences - Mobile Inventory page) for the task flow.

**Qty (quantity)**

Enter the item quantity to which you want to transfer.

**Dest Loc (destination location)**

Enter the storage location to which you want to transfer items.

**Save**

Click to save the transfer. The system performs validations on the transaction. If there are no errors, the system displays a confirmation message. If an error occurs, the system displays an error message allowing you to correct the error and save again.

## Bin to Bin Transfer: Options Page

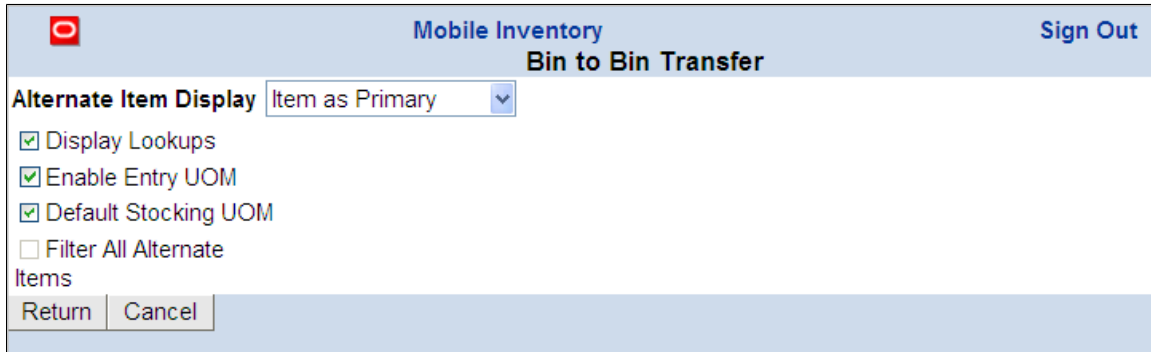
Use the Bin to Bin Transfer: Options page to change transfer options for the session

## Navigation

Mobile Inventory, Bin to Bin Transfer. Click the Options link.

### Image: Bin to Bin Transfer: Options page

This example illustrates the fields and controls on the Bin to Bin Transfer: Options page .



The screenshot shows the 'Bin to Bin Transfer' options page within the 'Mobile Inventory' application. The page has a light blue header with a red 'O' icon on the left, the text 'Mobile Inventory' in the center, and a 'Sign Out' link on the right. Below the header, the title 'Bin to Bin Transfer' is centered. The main content area contains the following controls:

- Alternate Item Display**: A dropdown menu currently set to 'Item as Primary'.
- Display Lookups
- Enable Entry UOM
- Default Stocking UOM
- Filter All Alternate Items

At the bottom of the page, there are two buttons: 'Return' and 'Cancel'.

Use this page to change processing and display options for bin to bin transfers. The settings on this page default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

To save changes, click the Return button.