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# PeopleSoft FSCM 9.2: PeopleSoft Mobile Inventory Management

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**March 2024**

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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.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

### Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). 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 families 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 family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, 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: 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>
<b>Key+Key</b>	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 <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> 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.  Ampersands also precede all PeopleCode variables.

<b>Typographical Convention</b>	<b>Description</b>
⇒	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)

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

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## PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the “Understanding Keyword Search within Components” (Application Fundamentals) topic.

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

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## Contact Us

Send your suggestions to [psoft-infodev\\_us@oracle.com](mailto:psoft-infodev_us@oracle.com).

Please include the applications update image or PeopleTools release that you're using.

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## Follow Us

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	<a href="#">Follow @PeopleSoft_Info on X.</a>
	<a href="#">Read PeopleSoft Blogs</a>
	<a href="#">Connect with PeopleSoft on LinkedIn</a>



## Chapter 1

# Understanding PeopleSoft Mobile Inventory Management

## Common Elements Used in Mobile Inventory Management

<b>Field or Control</b>	<b>Description</b>
<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. 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>Field or Control</b>	<b>Description</b>
<b>Process Monitor</b>	View the status of submitted process requests.  See documentation <i>PeopleTools : PeopleSoft Process Scheduler</i> .
<b>Report ID</b>	The report identifier.
<b>Report Manager</b>	View report content, check the status of a report, and see detailed messages.  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</b> (instance or process instance)	The number that represents where the request is in the queue.

See the product documentation for *PeopleTools: Applications User's Guide*

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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 capability enables you to take advantage of the cost savings and efficiency improvements inherent in processes driven by mobile devices.

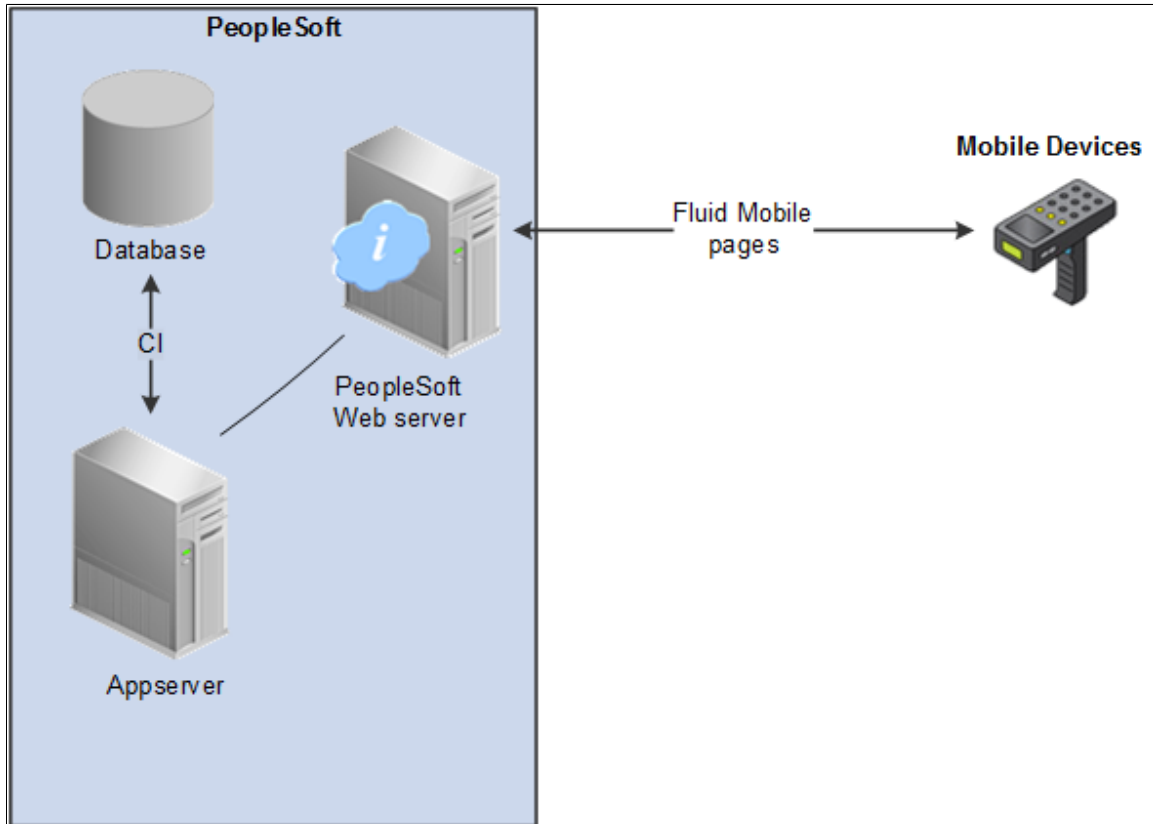
Use this documentation for common information about:

- Setting up PeopleSoft Mobile Inventory Management.
- Performing Item Stock Inquiries using Mobile Inventory Management.
- Using Mobile Receiving.
- Using Mobile Delivery.
- Setting up GS1 and HIBC Barcode Support.



- Counting Par Locations using a mobile device.
- Counting Inventory Stock using a mobile device.
- Using Mobile Express Issue.

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 also have installed the PeopleSoft Inventory application.
- Application server that runs business logic and submits SQL to the database server.

Pages on the mobile device provide 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.

PeopleSoft Mobile Inventory Management supports the GS1 barcode format; a single such barcode contains multiple data elements. You may therefore scan, identify, and separate data elements from a GS1 barcode and use them in separate entry fields on the Mobile Inventory page.

To effectively operate PeopleSoft Mobile Inventory, associated mobile devices must be equipped with a hardware barcode scanner and a touch screen display. Use of a hardware keyboard is optional but makes data entry efficient.

All PeopleSoft Mobile Inventory transactions are now also available using the PeopleSoft Fluid User Interface.

PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop.

With the introduction of PeopleSoft PeopleTools 8.55, Fluid navigation is the default navigation approach for PeopleSoft applications. Users can navigate to application pages from Fluid homepages. Additionally, application pages can be accessed using classic PeopleSoft navigation paths by selecting Navigator from the Fluid NavBar.

The PeopleSoft application reads the type of device you are using and renders the page accordingly. However, some pages are not designed for smart phones at this time.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Fluid User Interface Developer's Guide.*
- *PeopleTools: Applications User's Guide, Working With PeopleSoft Fluid User Interface.*

A PeopleSoft Fluid User Interface home page appears when you log into the system. From this home page you can view notifications, access applications, and navigate throughout the PeopleSoft system by selecting individual tiles.

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## Prerequisites and Considerations

This topic discusses prerequisites and considerations to review prior to implementing the PeopleSoft Mobile Inventory Management 9.2 application.

These are prerequisites for the implementation of PeopleSoft Mobile Inventory Management for release 9.2:

- The setup of PeopleSoft Inventory 9.2 must be complete.
- (Optional) PeopleSoft Purchasing 9.2 is installed.

To use the mobile receiving and mobile delivery features, the setup of PeopleSoft Purchasing 9.2 must be complete.

- The PeopleTools release must be 8.54 or greater to work with the PeopleSoft Fluid User Interface based mobile transactions.
- 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 9.2 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.

The following table lists the Component Interfaces used by the Fluid User Interface Architecture:

**Note:** The PeopleSoft Fluid User Interface Architecture based Mobile Inventory transactions though, do not need the web services but continue to use the Component Interfaces.

<i><b>Component Interface</b></i>	<i><b>Description</b></i>	<i><b>Used by Mobile Tasks</b></i>
ADJUSTMENT_INV	Adjustments	Adjustments
MIN_NONCI_TRANS	Bin to Bin Transfers	Bin to Bin Transfers
CART_COUNT_INV	Get Par Locations for Mobile	Par Count Par Count Ad Hoc
CART_COUNT_INV	Save Par Locations for Mobile	Par Count Par Count Ad Hoc
COUNT_INV_CI	Inventory Counting Event Set	Guided Count Count By Item Count By Location
COUNT_INV_INF	Inventory Counting Event Set	Manual Count
EXPRESS_ISSUE_INV_CI	Express Issue for Mobile	Express Issue
MIN_FUL_INQ_INV_CI	Fulfillment Inquiry for detail information	Fulfillment Inquiry

<b>Component Interface</b>	<b>Description</b>	<b>Used by Mobile Tasks</b>
MIN_FUL_INQ_INV_CI	Fulfillment Inquiry for detail information	Fulfillment Inquiry
PUTAWAY_INQ_INV	Item Stock Inquiry for Mobile	Item Stock Inquiry
MIN_NPO_RECV_CI	Mobile Non-PO Receipt Service	Receiving PO Receiving Ad Hoc
PO_RECEIPT_CI	Mobile Receiving Get	Receiving PO
MIN_PO_RECV_CI	Mobile Receiving Save	Receiving PO
RECV_DELIVERY_CI	Mobile Delivery Get	Delivery
RECV_DELIVERY_CI	Mobile Delivery Save	Delivery
PUTAWAY_FEEDBK_MBL	Find Stockroom Find	Perform Putaway
PUTAWAY_FEEDBK_MBL	Perform Putaway Get	Perform Putaway
PUTAWAY_FEEDBK_MBL	Perform Putaway Save	Perform Putaway

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.

See the product documentation for  
*PeopleTools: Component Interfaces*

## Setting Up Component Interfaces for Mobile Inventory Management

This topic 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>Usage</i>
<u>Setup Component Interfaces Page</u>	MIN_CMPINTFC	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

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.

The screenshot shows the 'Setup Component Interfaces' page for the 'Receiving PO' portal object. The page title is 'Setup Component Interfaces'. Below the title, the 'Portal Object Name' is 'EPMIN\_PO\_RECEIVING' and the object is 'Receiving PO'. There are navigation links for 'Personalize', 'Find', 'View All', and a grid icon. The page shows a table with 4 rows of component interfaces. Each row has columns for 'Component Interface Name', 'Method', 'Auth Actn', and 'User Defined'. The 'User Defined' column has a checkbox and '+'/'-' buttons.

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.

<b>Field or Control</b>	<b>Description</b>
<b>Portal Object Name</b>	Identifies the Portal Content Reference where the menu is defined for the mobile transactions.
<b>Component Interface Name</b>	Identifies the name of the component interface used by the mobile transaction.
<b>Method</b>	Identifies the method that performs a specific function on a component interface at runtime. Methods include: <ul style="list-style-type: none"> <li>• <i>Create</i>: 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.</li> <li>• <i>Save</i>: 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.</li> </ul>
<b>Auth Actn</b> (authorize action)	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.

## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Installation Options Mobile Inventory - Fluid Page</a>	INSTALLATION_MIN_N	Define default values or features available on a Fluid mobile page at the installation level,

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define default values or features available on a Fluid mobile page at the individual user level. These entries override the same fields on the Installation Options - Mobile Inventory - Fluid page.
User Preferences - Overall Preferences Page	OPR_DEF_TABLE_FS1	Use the Business Unit field to identify the business unit to be displayed as the default value on the mobile page.
<u>Setup Delivery Cart Page</u>	DELIVERY_CART	Use the Setup Delivery Cart page to define delivery carts in PeopleSoft.
<u>Display Options - Mobile Inventory - Fluid Page</u>	MIN_OPTION_SCF	Modify display options on a Fluid mobile page for Mobile Inventory transactions and a given task flow

## Installation Options Mobile Inventory - Fluid Page

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

Navigation:

**Set Up Financials/ Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

This example illustrates the fields and controls on the Installation Options - Mobile Inventory Fluid 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 for a particular transaction.

<b>Field or Control</b>	<b>Description</b>
<b>Key Concatenation Separator</b>	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".
<b>Role Name</b>	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.
<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.
<b>Use Barcode Symbology ID</b>	Select to indicate use of the GS1 parsing logic in PeopleSoft Mobile Inventory Management.  <b>Note:</b> It is mandatory to use this setup configuration to parse a GS1 barcode; the system throws an error else.



<b>Field or Control</b>	<b>Description</b>
<b>Parse Barcode to Multi-Fields</b>	Select to populate parsing results to multiple fields on the Mobile Inventory page.
<b>Task Options</b> (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.
<b>Task Flow</b>	<p>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.</p> <p>The task flow selected in this field determines the additional fields on this page.</p>
<b>Filter All Alternate Items</b>	<p>Select this option to enable the system to search for alternate items in the <b>Find</b> and all duplicate alternate items in the <b>Item ID</b> fields respectively, on associated pages.</p> <hr/> <p><b>Note:</b> If you do not select this option the system does not search for and identify alternate items in the <b>Find</b> field. Also in such case the system stops when the first alternate item in the <b>Item ID</b> field is identified and does not search further to identify duplicate alternate items.</p> <hr/>
<b>Entry UOM Enabled</b>	Select to indicate that the Entry UOM (entry unit of measure) field is displayed, else you can only use the Stor UOM (storage unit of measure) field.
<b>MFG Item ID</b>	The system searches for only a manufacturer's item ID matching the value in this field.
<b>Supplier Item ID</b>	The system searches for only a supplier's item ID matching the value in this field.
<b>Default Stocking UOM</b>	Select to define one unit of measure as the default stocking UOM.
<b>Auto Add Search Results</b>	Select to indicate that all matching receipt distribution lines, from a search performed on a task flow, are automatically added to the delivery.
<b>Save Delivery Document</b>	Select to indicate that the Delivery Document field is to remain populated after items are added to a delivery cart.
<b>Default Delivered To</b>	Select to indicate that the Mobile Delivery task flow should attempt to provide a default value for the <b>Delivered To</b> field that is based on a hard-coded hierarchy of fields.

<b>Field or Control</b>	<b>Description</b>
<b>Use Default Delivery Cart</b>	Select to indicate use of the delivery cart that the system assigns as default. <hr/> <b>Note:</b> You can define the default delivery cart on the cart definition page. <hr/>
<b>Display Show/Hide information</b>	Select to display additional item information.
<b>Auto Expand Detail</b>	Select to automatically expand additional item information and is available when the Display Show/ Hide Information is selected.
<b>Allow Multiple BUs in Cart</b>	Select to input multiple receipt data from different business units.
<b>Demand Source</b>	Select a demand source. The available options include Material Request, Material Return, Planning Requisition, Purchasing Requisition and Sales order.
<b>Sched Date Option</b>	Select a date option from the drop-down list. The available options are Date Range, Specific and Today.
<b>Sched Days +/- Today</b>	Select a scheduled day from the drop-down list.
<b>Ship Date Option</b>	Select a date option from the drop-down list. The available options are Date Range, Specific and Today.
<b>Ship Days +/- Today</b>	Select a ship day from the drop-down list.
<b>Prior Entry Display</b>	Select to enable the display of the last item 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>Count ID</b>	Select to display the unit of measure used to count event detail line items. When you select the check box, the Count UOM field is enabled on manual count pages.
<b>Find</b>	Select this option to allow the cursor to move to the Find field immediately post a count.
<b>Order UOM Conversion</b>	Select to indicate conversion of an ordering unit of measure.
<b>Expand Comments</b>	Select to expand the comments area.
<b>Print Delivery Report</b>	Select to run a Delivery report when you create the receipt.

<b>Field or Control</b>	<b>Description</b>
<b>Set Select Checkbox</b>	Select to set the default value to selected when you access the Receiving PO pages.
<b>Display Storage Location</b>	Select to control the visibility of the storage location in the distribution line.
<b>Display Warning Messages</b>	Select to control the validation of the saving process  <b>Note:</b> In case of a Receiving PO transaction, a warning message is triggered when a lot, serial or tag number is missing. This does not block the saving process.

**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.

## User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) to define default values or features available on a Fluid mobile page at the individual user level.

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

Navigation:

**Set Up Financials /Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid**

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

The screenshot displays the 'User Preferences - Mobile Inventory - Fluid' page. At the top, there are tabs for 'User Preferences' and 'Mobile Inventory - Fluid'. Below the tabs, the 'User ID' is set to 'VP1', the 'Name' is 'Default Operator', and there is a search field for 'Role Name'. The 'Task Options' section includes a 'Task Flow' dropdown set to 'Par Count', a checkbox for 'Use Installation Values', and dropdowns for '\*Initial Display Mode' (All Items Grid) and '\*Alternate Item Display' (Item Only). A 'Show on Page' section contains a list of checkboxes: Expert Mode (checked), Lookups (checked), Description (checked), MFG Item ID (unchecked), Count ID (unchecked), Find (checked), Prior Entry Display (checked), Unique Compartments (unchecked), Filter All Alternate Items (unchecked), and Display Par/Max Qty (unchecked).

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 - Fluid page. This page is optional; the Installation Options - Mobile Inventory - Fluid 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.

## 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 > Inventory Mobile > Setup Delivery Cart**

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.

The screenshot shows the 'Setup Delivery Cart' page with the following fields and values:

- Unit:** US001
- Delivery Cart ID:** DC001
- Status:** Active (dropdown menu)
- Description:** Delivery Cart 1 (text input)
- Long Description:** (empty text area)
- Character count:** 254 characters remaining
- Owner:** VP1 (text input with search icon)
- Default Cart:**  (checkbox)

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.

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	Select a status of <i>Active</i> or <i>Inactive</i> . 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 <i>Active</i> .
<b>Cart Owner</b>	Select the User ID of the individual who owns the cart. This field defaults to the user who is signed into the system.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Default Cart</b>	Select to mark this delivery cart as default.

---

**Note:** You must setup delivery carts to process deliveries or use delivery carts.

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## **Display Options - Mobile Inventory - Fluid Page**

Use the Display Options - Mobile Inventory - Fluid page (MIN\_OPTION\_SCF) to modify display options on a Fluid mobile page for Mobile Inventory transactions and a given task flow.

Navigation:

Fluid Home, Mobile Inventory, Par Count, Display Options

This example illustrates the fields and controls on the Display Options - Mobile Inventory - Fluid page.

Cancel
Display Options
Done

\*Quantity Options

\*Display Options

\*Initial Display Mode

\*Alternate Item Display

**Show on Page**

---

Expert Mode  Yes

Lookups  Yes

Description  Yes

MFG Item ID  No

Count ID  No

Find  Yes

Prior Entry Display  Yes

Unique Compartments  No

Filter All Alternate Items  No

Display Par/Max Qty  No

Use this page to change processing and display options for a Mobile Inventory transaction. The settings on this page are provided by default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory—Fluid page for the task flow. Most fields can be changed for the session.

<b>Field or Control</b>	<b>Description</b>
<b>Quantity Options</b>	Select an option to saved in the par location. The available options are : <ul style="list-style-type: none"> <li>• Count</li> <li>• Request</li> </ul>
<b>Display Options</b>	Select an option to indicate which rows appear in grid view. The available options are : <ul style="list-style-type: none"> <li>• All</li> <li>• Counted</li> <li>• Not Counted</li> </ul>
<b>Initial Display Mode</b>	Select a view to indicate how items display immediately after the search page. The available views are: <ul style="list-style-type: none"> <li>• All Items Grid</li> <li>• All Items List</li> <li>• 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: <i>Alternate Only</i> , <i>Alternate as Primary</i> , <i>Item Only</i> , and <i>Item as Primary</i> .  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.
<b>Lookups</b>	Select provided Lookup icons for fields that are available for searches.
<b>Description</b>	Select whether to display item descriptions in the search results for Grid and List Item page.
<b>MFG Item ID</b>	The system searches for only a manufacturer's item ID matching the value in this field.
<b>Supplier Item ID</b>	The system searches for only a supplier's item ID matching the value in this field.
<b>Entry UOM Enabled</b>	Select to indicate that the Entry UOM (entry unit of measure) field is displayed, else you can only use the Stor UOM (storage unit of measure) field.

<b>Field or Control</b>	<b>Description</b>
<b>Count ID</b>	Displays the numerical count value if header selected.
<b>Find</b>	Select to enable the Go or Search button.
<b>Run Close Short</b>	Select to enable the Go or Search button.
<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>Auto Add Search Results</b>	Select to indicate that all matching receipt distribution lines, from a search performed on a task flow, are automatically added to the delivery.
<b>Save Delivery Document</b>	Select to indicate that the Delivery Document field is to remain populated after items are added to a delivery cart.
<b>Print Delivery Report</b>	Select to run a Delivery report when you create the receipt.
<b>Set Select Checkbox</b>	Select to set the default value to selected when you access the Receiving PO pages.
<b>Display Storage Location</b>	Select to control the visibility of the storage location in the distribution line.
<b>Display Warning Messages</b>	Select to control the validation of the saving process. <hr/> <b>Note:</b> In case of a Receiving PO transaction, a warning message is triggered when a lot, serial or tag number is missing. This does not block the saving process. <hr/>
<b>Default Delivered To</b>	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.
<b>Use Default Delivery Cart</b>	Select to indicate use of the delivery cart that the system assigns as default <hr/> <b>Note:</b> You can define the default delivery cart on the cart definition page. <hr/>
<b>Prior Entry Display</b>	Select to enable the display of the last item 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>Field or Control</b>	<b>Description</b>
<b>Entry UOM</b>	Select to indicate that the Entry UOM (entry unit of measure) field is displayed, else you can only use the Stor UOM (storage unit of measure) field.
<b>Default Stocking UOM</b>	Select to define one unit of measure as the default stocking UOM.
<b>Pre-Load Serial IDs</b>	<p>Select to pre-load serial IDs for a particular item and location when the Serial ID page is displayed. The default value is selected.</p> <p>If the item being counted is a serial-controlled item, then when the item is loaded, the mobile application disables the <b>Count Quantity</b> field and adds a field from which to add serials. The <b>Count Quantity</b> field is automatically set to display the number of serials that are counted and places the cursor in the <b>Serial</b> field.</p> <hr/> <p><b>Note:</b> The existing serials in the count are loaded automatically if the <b>Pre-Load Serials</b> check box is selected.</p> <hr/> <p>If the <b>Pre-Load Serials</b> 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.</p>
<b>Count UOM Enabled</b>	Select to display the unit of measure used to count event detail line items. When you select the check box, the Count UOM field is enabled on manual count pages.
<b>Unique Compartments</b>	Select to display one item per compartment only in Single Item Enter mode of the current Par Location. If a single item is present in multiple compartments, they do not display
<b>Filter All Alternate Items</b>	<p>Select this option to enable the system to search for alternate items in the <b>Find</b> and all duplicate alternate items in the <b>Item ID</b> fields respectively, on associated pages.</p> <hr/> <p><b>Note:</b> If you do not select this option the system does not search for and identify alternate items in the <b>Find</b> field. Also in such case the system stops when the first alternate item in the <b>Item ID</b> field is identified and does not search further to identify duplicate alternate items.</p> <hr/>
<b>Order UOM Conversion</b>	Select to indicate conversion of an ordering unit of measure.
<b>Display Par/ Max Qty</b>	Select to display or hide an optimized or maximum quantity in Grid mode.

<b>Field or Control</b>	<b>Description</b>
<b>Set Cursor on Find Box</b>	Select this option to allow the cursor to move to the Find field immediately post a count.
<b>Display Show/Hide information</b>	Select to display the <b>Show/Hide</b> icon on Par Count pages. You can use this icon to manually expand and collapse additional line information.  <b>Note:</b> When not selected the system only displays basic information for each row in the table.
<b>Auto Expand Detail</b>	Select to automatically expand additional item information and is available when the Display Show/ Hide Information is selected.
<b>Allow Multiple BUs in Cart</b>	Select to input multiple receipt data from different business units.
<b>Signature Required</b>	Select to indicate that the mobile application requires a signature of the person receiving a delivery.

## Setting Up Alternative Item Identifiers

This topic 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Manufacturers Page	MANUFACTURER	Set up manufacturers to be used with universal item IDs and with manufacturer's item IDs.
Define Item - Manufacturer's Item Page	ITM_MFG_SP	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 Page	VNDR_ID1	Define suppliers used in your PeopleSoft system.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Purchasing Attributes - Item Supplier Page	ITM_VENDOR	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 Page	PROD_DEFN	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 Page	INV_ITEMS_DEFIN4	Enter the Universal Product Code (UPC) to be linked with the item ID (MASTER_ITEM_TBL).
Universal Item ID Types Page	UPN_TYPE_CD	Set up universal item identifier types.  See documentation PeopleSoft Managing Items , Working with Items, Using Universal Item Identifiers.
Universal Item Identifiers Page	ITM_MFG_UPN	Set up universal item IDs.  See documentation PeopleSoft Managing Items , Working with Items, Using Universal Item Identifiers.
<u>Alternate Item Groups Page</u>	IN_ALT_ITEM_GROUPS	Create and maintain alternate item groups to define the alternate item types used. Valid alternate types include <i>Mfg Item ID</i> , <i>Product ID</i> , <i>UPC Code</i> , <i>UPN</i> , or <i>Supplier Item ID</i> .
Inventory Definition - Business Unit Options Page	BUS_UNIT_INV5	Identify an alternate item group for an inventory business unit in the Mobile Inventory group box.  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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Purchasing Definition - Mobile Receiving Page	BU_OPT_MOBILE_REC	Identify an alternate item group for an purchasing business unit.  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.
Installation Options - Mobile Inventory Page	INSTALLATION_MIN_N	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 Page	OPR_DEF_TABLE_MIN	(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 topic 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

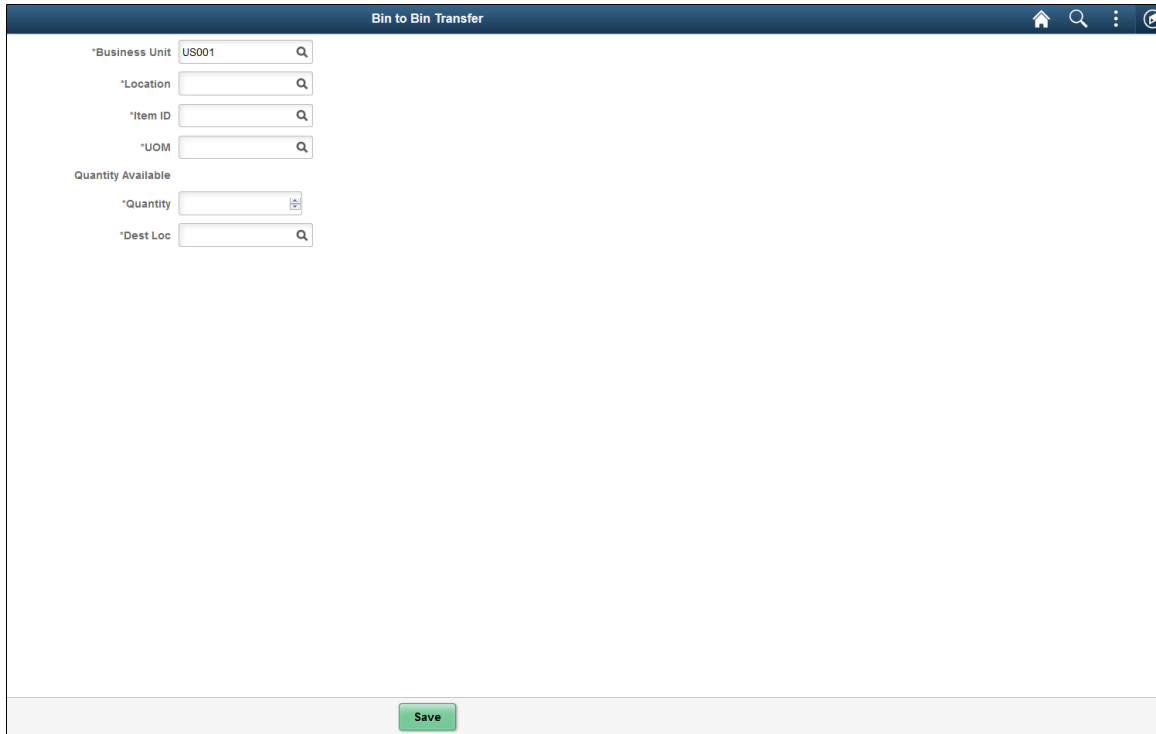
When entering or selecting items, a user doesn't always know the item ID stored in the MASTER\_ITEM\_TBL record. The Alternative Item Identifiers feature within PeopleSoft Mobile Inventory Management can use alternate item IDs to determine a specific item ID. Within PeopleSoft Mobile Inventory Management,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

<b>Term</b>	<b>Definition</b>
Item ID (MASTER_ITEM_TBL)	<p>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.</p>
Alternate Item	<p>A different item identification recorded within the PeopleSoft system. The alternate item IDs that can be used by the Alternative Item Identifiers feature are:</p> <ul style="list-style-type: none"> <li>• <i>Product ID</i>: 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).</li> <li>• <i>Manufacturers Item ID</i>: 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).</li> <li>• <i>Supplier Item ID</i>: 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).</li> <li>• <i>UPC Code</i>: 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).</li> <li>• <i>Universal Item IDs (UPN)</i>: 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.</li> </ul>

## 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.


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



The screenshot displays the 'Bin to Bin Transfer' main transaction page. The page features a dark blue header with the title 'Bin to Bin Transfer' and navigation icons (home, search, menu, and refresh). Below the header, there are several input fields for data entry:

- 'Business Unit' with the value 'US001' and a search icon.
- 'Location' with a search icon.
- 'Item ID' with a search icon.
- 'UOM' with a search icon.
- 'Quantity Available' section containing:
  - 'Quantity' with a numeric input field and a search icon.
  - 'Dest Loc' with a search icon.

A green 'Save' button is located at the bottom center of the page.

<b>Term</b>	<b>Definition</b>
<p><b>Item ID</b></p>	<p>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.</p> <p>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:</p> <ol style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>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.</li> <li>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 <i>Alternate</i> collapsible region of the Look Up Item ID page to do a specific look up using just one of the alternate item value fields.</li> <li>5. If no item ID (MASTER_ITEM_TBL) or alternate item ID is found for the task flow, then the system displays an error.</li> </ol>
<p> (Look Up Icon)</p>	<p>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.</p>

## 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.

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.

**Lookup**

Search for: Item ID

▼ Search Criteria Show Operators

Business Unit US001

Item ID (begins with)

Description (begins with)

Item Group (begins with)  🔍

Family (begins with)  🔍

▼ Search Results

14 rows

Item ID	Description	Item Group	Family
001-0294	36F1C PORTABLE CRYOSURGICAL SY	SURGERY	
043250	CORTARA BURDUCK BASELINE HALTE	DIAGNOSTIC	
22700	Tape Electrode, Non-Radiolucen	DIAGNOSTIC	
30807732G	ECG Electrode, Resting, 5500 Q	DIAGNOSTIC	
31433538	ECG Electrode, Resting, 5400 Q	DIAGNOSTIC	
3SS01D2313	Syringe, 1cc, 23G x 1/2" Fixed N	NEEDLES	
4123903	X-Protection Gloves, Medium 7	GLOVES	
8881833510	Syringe, 3mL, 25G x 1" Needle	NEEDLES	
AM4000	Laptop Computer	ADMIN	LAPTOP

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.



<b>Term</b>	<b>Definition</b>
<b>Alternate</b>	<p>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:</p> <ol style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>3. If no item ID (MASTER_ITEM_TBL) or alternate item ID is found, then the search results section is blank.</li> </ol>
<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>Search</b>	Click this button to perform a search based on the criteria entered above.

<b>Term</b>	<b>Definition</b>
<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.

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**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.

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## 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 > Define Alternate Search Groups**

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="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	UPN	HI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	UPN	SKU	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	UPN	UK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Mfg Item ID		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Supplier Item ID		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Product ID		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	UPC Code		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

<b>Field or Control</b>	<b>Description</b>
<b>Alternate Type</b>	Select the type of alternate item. Options include <i>Mfg Item ID</i> , <i>Product ID</i> , <i>UPC Code</i> , <i>UPN</i> (Universal Product Number), or <i>Supplier Item ID</i> .  If you select <i>UPN</i> in this field, then you must select an option in the <b>UPII Type Code</b> 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.
<b>UPII Type Code</b> (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.

<i>Field or Control</i>	<i>Description</i>
<b>Default UOM</b> (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 <i>UPN</i> is selected in the <b>Alternate Type</b> field. The UOM is defined on the Universal Item Identifiers page.

## Setting Up GS1 and HIBC Barcode Support

This topic describes the pages you use to set up GS1 Barcode support in PeopleSoft Mobile Inventory.

### Pages Used to Set Up HIBC and GS1 Barcode Support

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Barcode Symbology Type Page</u>	MIN_BARCD_SYM	Enter the Barcode Symbology Identifier type page details.
<u>Barcode Symbology Identifier Page</u>	MIN_BARCD_SI	Enter the Barcode Symbology Identifier page details.
<u>Barcode Application Identifier Page</u>	MIN_BARCD_AI	Enter the Barcode Application Identifier page details.
<u>Barcode Rule Setting Page</u>	MIN_BARCD_RULE	Enter the HIBC Barcode Rule Setting page details.

### Barcode Symbology Type Page

Use the Barcode Symbology Type page (MIN\_BARCD\_SYM) to enter the Barcode Symbology Identifier type page details.

Navigation:

**Set Up Financials/ Supply Chain > Product Related > Inventory Mobile > Barcode Symbology Type**

This example illustrates the fields and controls on the GS1 Barcode Symbology type page. You can find definitions for the fields and controls later on this page.

This example illustrates the fields and controls on the HIBC Barcode Symbology Type page. You can find definitions for the fields and controls later on this page.

This page enables you to describe the Barcode Symbology Identifier details.

<b>Field or Control</b>	<b>Description</b>
<b>Set ID</b>	Displays the associated Set ID information.
<b>Barcode Type</b>	Displays the barcode information type.
<b>Short Description</b>	Enter a short description for the barcode type.
<b>Description</b>	Enter a description for the barcode type.

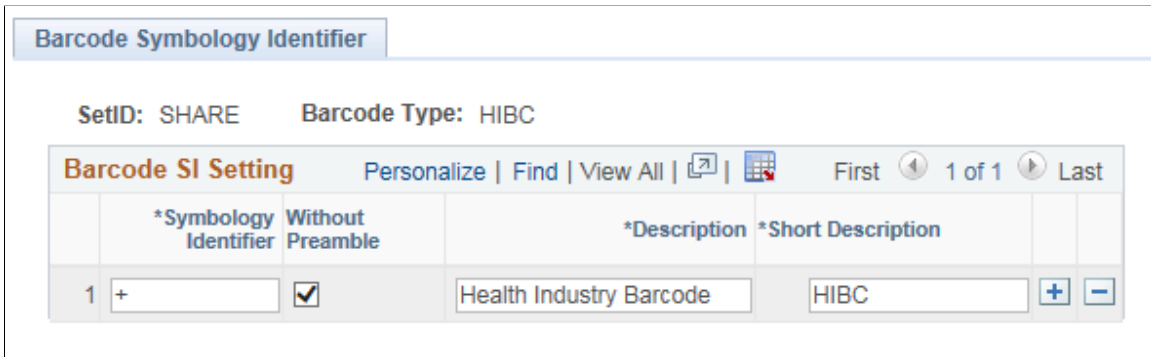
## Barcode Symbology Identifier Page

Use the Barcode Symbology Identifier page (MIN\_BARCD\_SI) to enter the Barcode Symbology Identifier page details.

Navigation:

**Set Up Financials/ Supply Chain > Product Related > Inventory Mobile > Barcode Symbology Identifier**

This example illustrates the fields and controls on the HIBC Barcode Symbology Identifier page. You can find definitions for the fields and controls later on this page.



This page enables you to describe the Barcode Symbology Identifier details.

<i>Field or Control</i>	<i>Description</i>
<b>SetID</b>	Displays the associated Set ID information.
<b>Barcode Type</b>	Displays the barcode information type.
<b>Symbology Identifier</b>	Enter the barcode symbology identifier.
<b>Without Preamble</b>	Select to indicate if a character preamble is present on the scanner or not.  <b>Note:</b> This check box is not selected by default.
<b>Description</b>	Enter a description for the barcode symbology identifier.
<b>Short Description</b>	Enter a brief description for the barcode symbology identifier.

**Barcode Application Identifier Page**

Use the Barcode Application Identifier page (MIN\_BARCD\_AI) to enter the Barcode Application Identifier page details.

Navigation:

**Set Up Financials/ Supply Chain > Product Related > Inventory Mobile > Barcode Application Identifier**

This example illustrates the fields and controls on the Barcode Application Identifier page. You can find definitions for the fields and controls later on this page.

Barcode Application Identifier

SetID: SHARE

\*Barcode Type

\*Application Identifier

Identifier Prefix

\*Identifier Type  ▼

\*Identifier Length

\*Identifier Value Type  ▼

\*Identifier Value Length Type  ▼

\*Identifier Value Length

Record Name

Field Name

Description

This page enables you to describe the Barcode Application Identifier details.

<b>Field or Control</b>	<b>Description</b>
<b>Set ID</b>	Displays the associated Set ID information.
<b>Barcode Type</b>	Enter the barcode information type.
<b>Application Identifier</b>	Enter the alphanumeric value of the application identifier.
<b>Identifier Prefix</b>	Displays the application identifier prefix.
<b>Identifier Type</b>	Select an identifier type from the drop-down list.
<b>Identifier Length</b>	Enter numeric digits to indicate the length of the identifier in characters.
<b>Identifier Value Type</b>	Select an identifier value type from the drop-down list.
<b>Identifier Value Type Length</b>	Select an identifier value length type from the drop-down list.
<b>Identifier Value Length</b>	Enter the identifier value.



<b>Field or Control</b>	<b>Description</b>
<b>Record Name</b>	Enter the record name.
<b>Field Name</b>	Enter the field name.
<b>Description</b>	Enter a description for the barcode application identifier.

## Barcode Rule Setting Page

Use the Barcode Rule Identifier page (MIN\_BARCD\_RULE) to enter HIBC Barcode Rule Setting page details.

Navigation:

**Set Up Financials/ Supply Chain > Product Related > Inventory Mobile > Barcode Rule Setting**

This example illustrates the fields and controls on the Barcode Rule Setting Page. You can find definitions for the fields and controls later on this page.

Barcode Rule Setting										
SetID: SHARE										
HIBC Barcode Rules Setting										
	Date Format	Date Usage	Data Usage	Identifier Type	Identifier Length	Link Char	Mod Check Char	Customize Flag	Type	Description
1								<input type="checkbox"/>	P	<input type="text"/>
2	YYJJJ	EXP				L	C	<input type="checkbox"/>	S	<input type="text"/>
3			LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
4	MMYY	EXP	LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
5	MMDDYY	EXP	LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
6	YYMMDD	EXP	LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
7	YYMMDDHH	EXP	LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
8	YYJJJ	EXP	LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
9	YYJJHH	EXP	LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
10			LOT	Variable	18	L	C	<input type="checkbox"/>	S	<input type="text"/>
11						L	C	<input type="checkbox"/>	S	<input type="text"/>

This page enables you to describe the Barcode Rule Setting details.

<b>Field or Control</b>	<b>Description</b>
<b>Application Identifier</b>	Displays the alphanumeric value of the application identifier.
<b>Qty Format</b>	Displays a character to indicate the quantity type.
<b>Qty Length</b>	Displays the length of the quantity value.

<b>Field or Control</b>	<b>Description</b>
<b>Date Flag</b>	Displays a character to indicate the date type.
<b>Date Format</b>	Displays the appropriate date type. <b>Note:</b> Formats like DD, YY, YYYY ,MM, JJJ and HH are supported but D, YYY, and HM are not.
<b>Date Usage</b>	Indicate the date type (expiry or manufacture) from the drop-down menu.
<b>Data Usage</b>	Indicate data type (Lot or Serial ID) from the drop-down menu.
<b>Identifier Type</b>	Indicate the data length (variable or fixed) from the drop-down menu.
<b>Identifier Length</b>	Displays the maximum data length .
<b>Link Char</b>	Displays the link character. <b>Note:</b> This is the checksum control character as calculated for the product ID barcode.
<b>Mod Check Char</b>	Displays the mod check character <b>Note:</b> This is the checksum control character for the secondary barcode using the modulus 43 algorithm.
<b>Customize Flag</b>	Select to indicate the barcode rule is customized by the customer and is not system assigned.
<b>Type</b>	Displays the current barcode rule type; the customized rule type is always S.
<b>Description</b>	Enter a description for the transaction rule. <b>Note:</b> You may add a new rule, but it may not always be recommended to do so; the page design is for the HIBC rule to loads automatically

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## 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 from the web browser.
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.

- 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.

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## 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, default values, and features for the Item Stock Inquiry page that appears on a mobile device.

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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Setup Component Interfaces Page	MIN_CMPINTFC	Define the component interface for the Item Stock Inquiry mobile page.
<u>Mobile Inventory Installation - Fluid Page</u>	INSTALLATION_MIN_N	Define Mobile Inventory — Fluid 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 <b>Task Flow</b> field.
User Preferences – Overall Preferences Page	OPR_DEF_TABLE_FS1	Use the Business <b>Unit</b> 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.
<u>Mobile User Task Options - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for Item Stock inquiries in Fluid. 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 - Fluid Page

Use the Mobile Inventory Installation - Fluid page (INSTALLATION\_MIN\_N) 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 - Fluid**

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid 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 the Mobile Inventory - Fluid Item Stock Inquiry page.

<b>Field or Control</b>	<b>Description</b>
<b>Key Concatenation Separator</b>	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".
<b>Role Name</b>	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.
<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.
<b>Use Barcode Symbology ID</b>	Select to indicate use of the GS1 parsing logic in PeopleSoft Mobile Inventory Management.
<b>Parse Barcode to Multi-Fields</b>	Select to populate parsing results to multiple fields on the Mobile Inventory page.
<b>Task Flow</b>	Identifies the Mobile Inventory page or menu option that uses the settings on this page. Enter the value of <i>Item Stock Inquiry</i> to define installation-level options for the Item Stock Inquiry page.

<b>Field or Control</b>	<b>Description</b>
<b>Alternate Item Display</b>	Select an option that indicates how an item or item as primary are displayed when specified for the transaction. Options include: <i>Item Only</i> , and <i>Item as Primary</i> .
<b>Lookups</b>	Select this check box to display the <b>Lookup</b> icon for the business unit and item fields at the top of the Item Stock Inquiry page on the mobile device. The <b>Lookup</b> icon enables you to view a list of values and select one.

## Mobile User Task Options - Fluid Page

Use the Mobile User Task Options - Fluid page (OPR\_DEF\_TABLE\_MIN) 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 > Mobile Inventory - Fluid**

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

This page enables you to customize the Item Stock Inquiry - Fluid page for an individual user. The fields displayed in this component are the same as those in 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.

## Performing Mobile Inventory Management Item Stock Inquiries Using the PeopleSoft Fluid User Interface

This topic discusses ways to perform item stock inquiries.



## Pages Used to Perform Mobile Inventory Management Item Stock Inquiries Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Item Stock Inquiry - Fluid Search Page</u>	MIN_ITMST_IN_SR_FL	Define Item Stock Inquiry search criteria.
<u>Item Stock Inquiry - Fluid Page</u>	MIN_ITMST_IN_RS_FL	Define Item Stock Inquiry information.
<u>Item Stock Inquiries - Display Options Fluid Page</u>	MIN_OPTION_SCF	Define page parameters.

### Item Stock Inquiry - Fluid Search Page

Use the Item Stock Inquiry - Fluid Search page to define Item Stock Inquiry search criteria.

Navigation:

**Mobile Inventory > Item Stock Inquiry > and enter search criteria**

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

<i>Field or Control</i>	<i>Description</i>
<b>Business Unit</b>	Select a 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.
<b>Item ID</b>	Scan or enter the PeopleSoft inventory item ID for the stock you want to review.

<i>Field or Control</i>	<i>Description</i>
<b>Description</b>	Displays the item description below the Item ID.

## Item Stock Inquiry - Fluid Page

Use the Item Stock Inquiry page to define Item Stock Inquiry information.

Navigation:

**Mobile Inventory > Item Stock Inquiry**

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

The screenshot shows a mobile application interface for an Item Stock Inquiry. At the top, there is a navigation bar with a back arrow, the text 'US010\10000', a flag icon, and a menu icon. Below the navigation bar, there are two icons: a grid icon and a list icon. To the right of these icons is a search box labeled 'Find' with a right-pointing arrow. The main content area displays the following information:

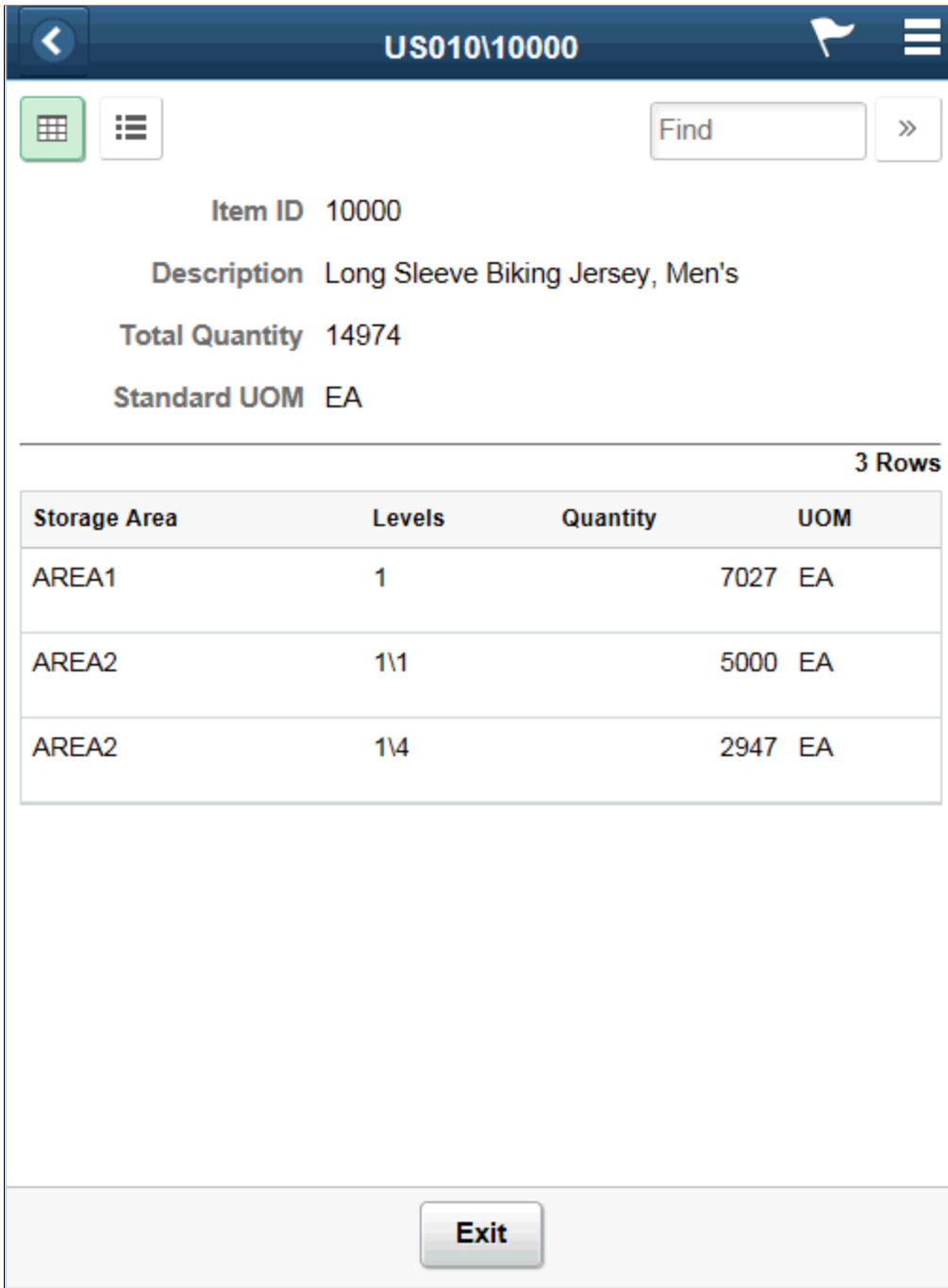
- Item ID** 10000
- Description** Long Sleeve Biking Jersey, Men's
- Total Quantity** 14974
- Standard UOM** EA



Below this information is a section titled '3 Rows' with a vertical scrollbar. This section contains two rows of storage area data:

Storage Area	Levels	Quantity	UOM	Status	Nettable	Non-Owned
AREA1	1	7027	EA	Open	Yes	No
AREA2	11	5000	EA	Open	Yes	No

At the bottom of the screen, there is an 'Exit' button.

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



<i>Field or Control</i>	<i>Description</i>
	Displays the item ID and storage areas in a grid.
	Displays the item ID and storage areas in a list.

<b>Field or Control</b>	<b>Description</b>
<b>Item ID</b>	Displays the PeopleSoft Inventory item ID and item description. The Item Information table displays item stock information at the PeopleSoft Inventory business unit level.
<b>Description</b>	Displays a description of the item below the Item ID.
<b>Total Quantity</b>	<p>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.</p> <hr/> <p><b>Note:</b> The <b>Available Quantity</b> value (reflecting the total item quantity that you can use to fulfill demand) can be displayed on this page if needed.</p> <hr/>
<b>Standard UOM</b>	Displays the standard unit of measure.
<b>Storage Area</b>	Displays the storage area containing the stock.
<b>Levels</b>	<p>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.</p> <p>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.</p>
<b>Quantity</b>	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).
<b>UOM</b>	Displays the unit of measure for the storage location.
<b>Serial ID</b>	Displays the serial identification numbers for the item stock in this location. This field only displays if the item is serial-controlled.
<b>Lot ID</b>	Displays the lot identification numbers for the item stock in this location. This field only displays if the item is lot-controlled.
<b>Availability Date and Expiration Date</b>	Displays the lot availability and expiration date.

## Item Stock Inquiries - Display Options Fluid Page

Use the Item Stock Inquiries- Display Options Fluid page to define page parameters.

Navigation:

**Mobile Inventory > Item Stock Inquiries > Menu > Display Options**

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

**Cancel** **Display Options** **Done**

\*Alternate Item Display

---

**Show on Page**

Lookups  Yes

Description  Yes

Find  Yes

Use this page to change processing and display options for item stock inquiry. The settings on this page are provided by default from the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory—Fluid page for the task flow. Most fields can be changed for the session.



## Chapter 4

# Using Inquiry by All Units

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## Setting Up Options for the Inquiry by All Units Task Flow

This topic discusses how to setup options for the Inquiry by All Units task flow.

### Pages Used to Set up Options for the Inquiry by All Units Task Flow

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Define installation options for the Inquiry by All Units task flow.
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for the Inquiry by All Units task flow.

### Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define installation options for the Inquiry by All Units task flow.

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory- Fluid**

Select Inquiry by All Units in the Task Flow field.

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid page for the Inquiry by All Units task flow.

Use this page to set up default options for Inquiry by All Units at the installation level.

## User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page to define user preferences for the Inquiry by All Units task flow.

Navigation:

**Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid.**

Select Inquiry by All Units in the Task Flow field.

Use this page to define Inquiry by All Units 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 - Fluid 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.

For additional information, see [Setting Up Installation Options and User Preferences](#)

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## Performing Mobile Inventory Inquiry by All Units Using the PeopleSoft Fluid User Interface

This topic discusses how to perform Mobile Inventory Inquiry by All Units.

## Page Used to Perform Mobile Inventory Inquiry by All Units Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Inquiry By All Units Page</u>	MIN_ITMALLBU_SR_FL	Display the stock availability of an item across business units.

### Inquiry By All Units Page

Use the Inquiry By All Units page to display the stock availability of an item across business units for different Set IDs.

Navigation:

**Mobile Inventory > Inquiry By All Units**

This example illustrates the fields and controls on the Inquiry By All Units Page.

## Inquiry By All Units

\*Item ID

Exclude Zero Qty Business Unit

This example illustrates the fields and controls on the Inquiry By All Units Search Results Page.

Business Unit	Qty Available	Qty Reserved	In-Transit Qty	Qty On Hand
FRA05	3430	19970	0	23400
GBR02	25024	15976	0	41000
US010	5792	1517	0	7309
US011	3418	15982	0	19400

**Line Totals**

Total Qty Available 37664 EA  
 Total Qty Reserved 53445 EA  
 Total Qty In-Transit 0 EA

Click the Business unit link to view the item balance by location page.

This example illustrates the fields and controls on the Item Balance by Location page

Storage Area	Location	Nettable	Qty Reserved	Qty Storage	UOM	Qty Reserved Base	Qty Storage Base
AREA1	1	Y	2	1066	EA	2	1066
AREA2	1/1	Y	0	3569	EA	0	3569
AREA2	1/2	Y	20	1382	EA	20	1382

Field or Control	Description
<b>Item ID</b>	Enter the PeopleSoft inventory item ID for the stock you want to check availability.  <b>Note:</b> You can view stock availability of an item across business units for different Set IDs.
<b>Exclude Zero Qty Business Unit</b>	Select the check box to exclude the following: <ul style="list-style-type: none"> <li>Business unit rows with quantity 0 for all columns</li> <li>SetIDs with no business units</li> <li>SetIDs with all business units with quantity 0 in all columns</li> </ul>

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Business Unit</b>	Click a PeopleSoft Inventory business unit to view location specific stock available in a particular business unit.

**Related Links**

“Viewing Item Balances” (PeopleSoft Inventory)

## Chapter 5

# 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.

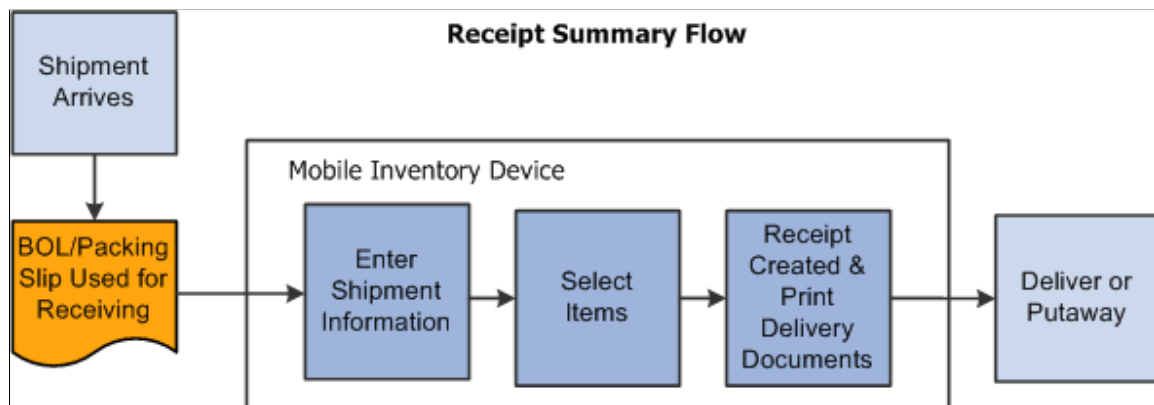
**Note:** To make changes to a receipt after an item has been received, you need to use the PeopleSoft system online Receiving pages.

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.

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.

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**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

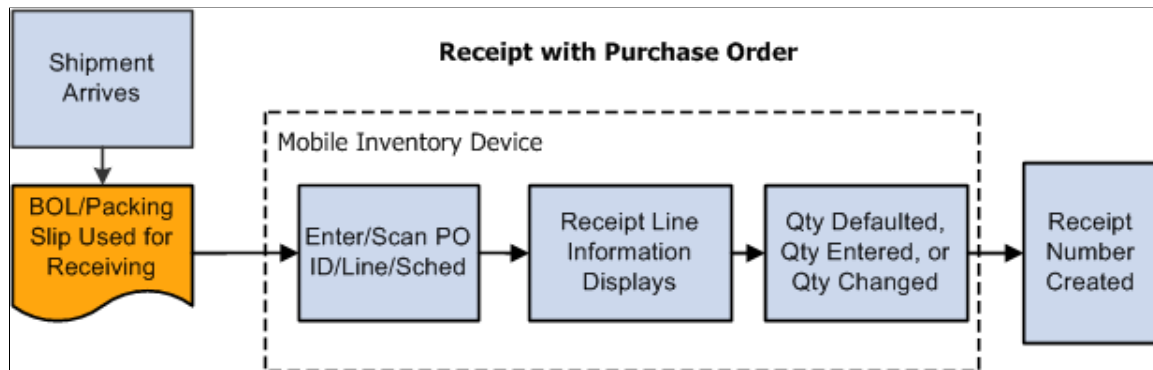
To take advantage of the purchasing authorizations established during the requisition and purchasing process, goods and services that you receive need to be referenced against a purchase order. With Mobile Receiving, the purchase order must exist; however, lines and schedules might not be known by the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



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, the ability to change these triggers are not always provided but receive default values from user preferences.

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**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.

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## 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.

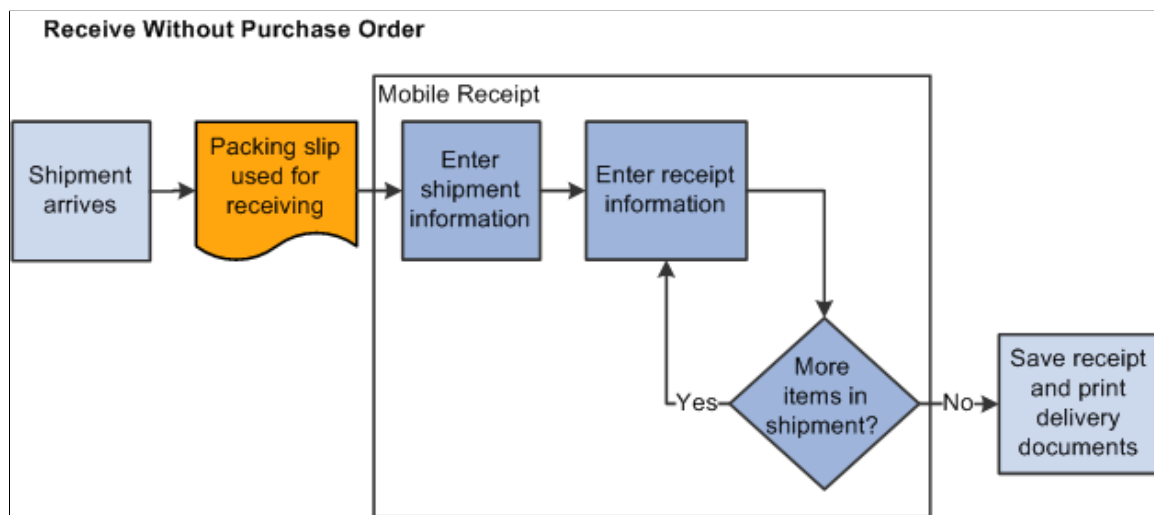
Another example might be when a department orders supplies using a credit card. In this case, there is not a purchase order and an invoice is not sent to accounts payable. When these items arrive, the receipt needs to be recorded and the items delivered to the appropriate person or department.

---

**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.**

---

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](#)

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

This topic discusses ways to setup PeopleSoft for use with mobile receiving.

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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Establish Mobile Receiving options for purchase orders with receipts.
<u>Installation Options - Mobile Inventory - Fluid Page</u>		Establish Mobile Receiving options for ad hoc receipts.
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for Mobile Receiving.
<u>Mobile Receiving Page</u>	BU_OPT_MOBILE_REC	Establish Mobile Receiving Ad Hoc default values.
<u>Receiver Setup Page</u>	OPR_DEF_RECV_SEC	Establish printer defaults for the Mobile Receiving Delivery report.

### Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) 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 > Mobile Inventory - Fluid**

Select the Receiving PO task flow.

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid: 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 - Fluid' 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
- Use Barcode Symbology ID
- Parse Barcode to Multi-Fields

**Task Options:**

- Task Flow: Receiving PO
- \*Initial Display Mode: All Items Grid
- \*Display Item: PO Item ID
- \*Alternate Item Display: Item Only
- Server Name: [Searchable]
- Output Destination Type: [Dropdown]
- Output Destination Format: [Dropdown]
- Output Destination: [Text Field]

**Show on Page:**

- Lookups
- Description
- Find
- Expand Comments
- Print Delivery Report
- Set Select Checkbox
- Display Storage Location
- Display Warning Messages
- Filter All Alternate Items

At the bottom, there are buttons for Save, Notify, and Refresh. The page title is 'Installation Options | Mobile Inventory - Fluid'.

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

<b>Field or Control</b>	<b>Description</b>
<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.
<b>Rows Displayed</b>	Enter the maximum number of rows that you want to display in the tables for the Mobile Receiving application.

<b>Field or Control</b>	<b>Description</b>
<b>Display Item</b>	<p>Select the item ID value that you want to display for the receipt line when it is displayed in Mobile Receiving. Values include:</p> <ul style="list-style-type: none"> <li>• Mfg Item ID</li> <li>• PO Item ID</li> <li>• Supplier Item ID</li> </ul> <p>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.</p>
<b>Lookups</b>	Select this check box to display the <b>Lookup</b> icons for fields in this transaction. The <b>Lookup</b> icon enables you to view a list of values and select one.
<b>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 <b>Filter</b> field and <b>Filter</b> 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 <b>Show/Hide</b> icon necessary to expand or collapse additional information sections in associated tables.
<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 <b>Sel</b> check box to selected when you access the Receiving - Receive Lines page.
<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 only the item ID is to be used for filtering, which also improves system performance.</p>

## Installation Options - Mobile Inventory - Fluid Page

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

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

Select the Receiving Ad Hoc task flow.

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

The screenshot displays the 'Installation Options - Mobile Inventory - Fluid' 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
- Use Barcode Symbology ID
- Parse Barcode to Multi-Fields

**Task Options:**

Task Flow: Receiving Ad Hoc

\*Alternate Item Display: Item Only

Server Name: [Searchable text field]

Output Destination Type: [Dropdown menu]

Output Destination Format: [Dropdown menu]

Output Destination: [Text field]

**Show on Page:**

- Lookups
- Description
- Find
- Print Delivery Report
- Filter All Alternate Items
- Display Show/Hide information

At the bottom, there are buttons for Save, Notify, and Refresh. The page title is 'Installation Options | Mobile Inventory - Fluid'.

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.

## User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) to define user preferences for Mobile Receiving.

Navigation:

## Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid

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

The User Preferences - Mobile Inventory - Fluid: Receiving PO task flow and Receiving Ad Hoc task flow pages use the same values as the corresponding Installation - Mobile Inventory - Fluid 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.

## 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

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". It contains four input fields, each with a magnifying glass icon for search:

- Supplier ID:** Contains the value "SCM0000001" and is associated with "BIKE-001".
- Category:** Contains the value "MISC".
- Unit of Measure:** Contains the value "EA".
- Alternate Item Group:** Is currently empty.

At the bottom of the window 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>Field or Control</b>	<b>Description</b>
<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>Field or Control</b>	<b>Description</b>
<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 <a href="#">Setting Up Alternative Item Identifiers</a> .

## 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.**

This example illustrates the fields and controls on the Receiver Setup page.

**Receiver Setup**

User VP1 Default Operator

**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  US001 NEW YORK OPERATIONS

Days +/- Today

RTV Dispatch Option  ▼

RTV Inventory Ship Option  ▼

RTV Inventory Destroy Option  ▼

OK Cancel Refresh



Use the Processes page (PO\_RECVPUSH) to establish printer defaults for the Mobile Receiving Delivery report.

Navigation:

**PeopleTools > Process Scheduler > Processes > Search by Process Name**

This example illustrates the fields and controls on the Processes page.

See “User Preferences – Receiving and RTV Page” (Application Fundamentals).

## Receiving Purchase Order Receipt Items Using the PeopleSoft Fluid User Interface on Mobile Devices

This topic discusses how to receive purchase order receipt items using a mobile device.

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

<i>Page Name</i>	<i>Usage</i>
<a href="#">Receiving PO - Fluid Search Page</a>	Search for purchase order items to receive.
<a href="#">Receiving PO - Fluid Receipt Main Page</a>	Select purchase order schedules to receive and define the quantity to receive.
<a href="#">Receiving PO - Fluid Receipt Line Details Page</a>	Enter purchase order receipt line information.
<a href="#">Receiving PO - Fluid Receipt Distribution Page</a>	View distribution line detail information of a receipt line.

## Receiving PO - Fluid Search Page

Use the Receiving PO - Fluid Search page to search for purchase order items to receive.

Navigation:

Mobile Inventory, Receiving PO

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

The screenshot displays the 'Receiving PO' search interface. At the top, there is a dark blue header with a back arrow on the left, the title 'Receiving PO' in the center, and a flag icon and a menu icon on the right. Below the header, the form contains several search fields:

- \*Business Unit**: Text input with 'US001' and a magnifying glass icon.
- \*Receipt ID**: Text input with 'NEXT'.
- PO Business Unit**: Text input with 'US001' and a magnifying glass icon.
- Order ID**: Text input with a magnifying glass icon.

A section titled **Advanced** is expanded, showing additional search fields:

- Ship To**: Text input with 'US001' and a magnifying glass icon.
- Item ID**: Text input with a magnifying glass icon.
- Supplier**: Text input with a magnifying glass icon.
- Supplier Item ID**: Text input with a magnifying glass icon.
- Mfg ID**: Text input with a magnifying glass icon.
- Mfg Item ID**: Text input with a magnifying glass icon.
- Days +/- Today**: Text input with '30'.
- Start Date**: Date input with '03/07/2016' and a calendar icon.
- End Date**: Date input with '05/06/2016' and a calendar icon.

At the bottom of the form, there are two buttons: a green 'Search' button and a grey 'Reset' button.

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.

Expand the **Advanced** section to view and update additional search criteria for purchase orders. Values in these fields are used to qualify the list of purchase orders.

<b>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	Displays the receiving business unit from the user's default business unit. You can change the business unit. The field is required.
<b>Receipt ID</b>	Enter the receipt ID that you want to use to create the receipt. The system assigns the ID or number when you save the receipt. The default value for the field is <i>Next</i> . 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.
<b>PO Business Unit</b> (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.
<b>Order ID</b>	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.
<b>Advanced</b>	Click to expand the Advanced table where you can define additional purchase order search criteria.
<b>Ship To</b>	Enter the ship to location for the purchase order schedules. This field defaults from the User Preferences - Procurement setting for the <b>Ship To Location</b> field. You can override the value. The business unit and ship to unit do not need to have the same value.

<b>Field or Control</b>	<b>Description</b>
<b>Item ID</b>	<p>Enter an item ID to which you want to limit the purchase order search.</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> <hr/> <p><b>Note:</b> Barcode scanning is supported if the corresponding switch is enabled.</p>
<b>Supplier</b>	<p>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.</p>
<b>Supplier Item ID</b>	<p>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 <b>Supplier Item ID</b> field, a supplier is required in the <b>Supplier</b> field.</p>
<b>Mfg ID</b> (manufacturer ID)	<p>Enter a manufacturer's ID to limit the purchase order search results to only those purchase orders with that manufacturer's ID.</p>
<b>Mfg Item ID</b> (manufacturer item ID)	<p>Enter the manufacturer's item ID to limit the search to just that item ID for the manufacturer.</p>
<b>Days +/- Today</b>	<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Start Date</b>	<p>Enter the start day 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 <b>Days +/- Today</b> field value.</p> <hr/> <p><b>Note:</b> If an Order ID is entered, this field is disabled.</p>
<b>End Date</b>	<p>Enter the end day 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 <b>Days +/- Today</b> field value.</p> <hr/> <p><b>Note:</b> If an Order ID is entered, this field is disabled.</p>
<b>Search</b>	<p>Click to initiate the search for an order ID. 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.</p> <p>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.</p>
<b>Reset</b>	<p>Click to reset the <b>Ship To</b> and <b>Days +/- Today</b> field search values in the Advanced Search table to the default values.</p> <p>The system also clears other input fields such as <b>Item, Supplier, Supplier Item ID, Mfg ID</b> and <b>Mfg Item</b> because these fields do not have default values.</p>

## Receiving PO - Fluid Receipt Main Page

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

Navigation:

Mobile Inventory, Receiving PO. Click the **Search** button on the Receiving page

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

**Receiving PO (US001\NEXT)**

▶ **Header**

Find  >>

View Selected 20 rows

<input checked="" type="checkbox"/> Item ID	Quantity	Dist
<input checked="" type="checkbox"/> 10009 Mountain Bike Gloves, Men's <input checked="" type="checkbox"/> 0000000015 1\2	<input type="text" value="4800"/>	
<input checked="" type="checkbox"/> 10009 Mountain Bike Gloves, Men's <input checked="" type="checkbox"/> 0000000015 1\3	<input type="text" value="4800"/>	
<input checked="" type="checkbox"/> 10009 Mountain Bike Gloves, Men's <input checked="" type="checkbox"/> 0000000015 1\4	<input type="text" value="4800"/>	
<input checked="" type="checkbox"/> 10009 Mountain Bike Gloves, Men's <input checked="" type="checkbox"/> 0000000015 1\5	<input type="text" value="4800"/>	

The Receiving PO - Fluid Receipt Main page provides a list of the purchase order items that met the purchase order search and Advanced Search that you entered. Use this page to select all or individual items to receive, and view or define shipping information for the purchase order receipt.

**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.

<b>Field or Control</b>	<b>Description</b>
<b>Carrier ID</b>	Enter or select the freight carrier identification that delivered the shipment
<b>Pro Number</b> (progressive number)	Enter the tracking number assigned to the shipment in which the material arrived and click the Apply button to apply changes to all receipt lines, if empty. <hr/> <b>Note:</b> If you enter a Pro number in the Header page, that value displays on this page. <hr/>
<b>Packing Slip</b>	Enter the packing slip. This value is typically listed on the packing slip provided by the supplier. Click the Apply button to apply changes to all receipt lines, if empty.
<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. Click the Apply button to apply changes to all receipt lines, if empty.
<b>Find</b>	Enter data to filter by.
<b>Header</b>	Click to view and maintain header information for the purchase order receipt.

<b>Field or Control</b>	<b>Description</b>
<b>View Selected and View All</b>	<p>Click the <b>View Selected</b> link to display the receipt rows that have been selected to be received.</p> <p>Click the <b>View All</b> link to view all rows from the original purchase order line selections.</p> <p>When you click either link, the system toggles to the other button. For example, when you initially access the Receiving PO — Fluid Receipt Main page, the system displays all purchase order rows and makes the <b>View Selected</b> link available. Then, after selecting or deselecting rows to include on the receipt, you can click the <b>View Selected</b> button to display just the rows that you've selected. When you access the list, the system displays the <b>View All</b> link that you can click to return to the original list.</p> <p>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, you can use the <b>View Selected</b> link to view the selected rows immediately.</p> <hr/> <p><b>Note:</b> If the Set Select Checkbox is selected, all receipt rows on the search results page are also selected.</p> <hr/>
<b>Save</b>	<p>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.</p> <p>See “Understanding the Receiving Business Process” (PeopleSoft Purchasing).</p> <hr/> <p><b>Note:</b> 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 Set Select Checkbox deselected will not be displayed. You can use the <b>View All</b> button to see all lines for the original selection.</p> <hr/> <p><b>Note:</b> After saving the items, the receipt processed fetches the UPN Type and UPN ID in purchasing.</p> <hr/>
<b>Exit</b>	Click to discard changes and exit to the Delivery search page.

## Receiving PO - Fluid Receipt Line Details Page

Use the Receiving PO - Fluid Receipt Line Details page to enter purchase order receipt line information

Navigation:



Mobile Inventory, Receiving PO, and click the Item ID link.

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

Cancel
Detail
Done

Item ID 10009

Description Mountain Bike Gloves, Men's

PO ID 0000000015\1\2

Supplier CAMPER'S-001

Due Date 09/30/2000

Category CYCLING

Packing Slip

Invoice

▼ **Pro Number**

---

Pro Number

Add

1 row

Pro Number	Remove
<input style="width: 90%; height: 20px;" type="text" value="Adhoc"/>	-

---

**Note:** Comments in a purchase order are displayed in a grid on the Receiving PO - Fluid Receipt Line Details 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.

---

**Note:** Duplicate Pro Numbers are not permitted.

---

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

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**Note:** When PO receiving is made for items that are marked *for inspection* in the item purchasing attributes, there will be a warning message on save, if the inspection is not completed for such items. The user will not be stopped from completing the receipt.

---

## Receiving PO - Fluid Receipt Distribution Page

Use the Receiving PO - Fluid Receipt Distribution page to view distribution line detail information of a receipt line.

Navigation:

Mobile Inventory, Receiving PO, and click the distribution icon on the receipt main page.

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







<
Receiving PO (US001\NEXT)
☰

**Schedule**

PO ID 0000000015\1\2  
 Item ID 10009  
 Description Mountain Bike Gloves, Men's  
 Line Qty 4800  
 Recv UOM EA  
 Standard UOM EA

☰
+

6 rows

Dist Seq	Quantity	Split
1\1	<input type="text" value="800"/>	
1\2	<input type="text" value="900"/>	
1\3	<input type="text" value="700"/>	
1\4	<input type="text" value="850"/>	
1\5	<input type="text" value="950"/>	
1\6	<input type="text" value="600"/>	

Apply
Cancel

The distribution button displays if one of the following conditions are met:




1. An Inventory BU is defined in a PO distribution line.
2. An Asset BU is defined in a PO distribution line.
3. The item is a device tracking one.

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

**Receiving PO (US001\NEXT)**

▼ **Schedule**

PO ID 0000000015\1\2  
Item ID 10009  
Description Mountain Bike Gloves, Men's  
Line Qty 4800  
Recv UOM EA  
Standard UOM EA

6 rows

Dist Seq 1\1  
Inventory Unit US010  
Quantity

Dist Seq 1\2  
Inventory Unit US010  
Quantity

Dist Seq 1\3  
Inventory Unit US010  
Quantity

**Apply** **Cancel**

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

<
Receiving PO (US001\NEXT)
🚩
☰

---

**▼ Schedule**

PO ID 0000000015\12  
 Item ID 10009  
 Description Mountain Bike Gloves, Men's  
 Line Qty 4800  
 Recv UOM EA  
 Standard UOM EA

📊
☰
+

Dist Seq 1\7

Quantity

Update

---

**▼ Prior Entry**

Dist Seq 1\1

Inventory Unit US010 Modify

Quantity 500

⏪
⏩
Dist Row (2 of 7)
▶
▶

Apply
Cancel

<i>Field or Control</i>	<i>Description</i>
<b>Split, Update and Modify</b>	Enter a quantity and click Split to break into smaller distribution sequences.  Enter a value and click Update for single entry and click Modify to change the value for a Prior Entry.

<i>Field or Control</i>	<i>Description</i>
<b>Apply</b>	Click to finalize the changes made on page.
<b>Cancel</b>	Click to cancel any changes that you made to this page and return to the Receiving PO - Fluid Receipt Main page.

### Related Links

[Setting Up Installation Options and User Preferences](#)

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## Receiving Items by Ad Hoc Receipt Using the PeopleSoft Fluid User Interface on a Mobile Device

This topics discusses how to receive items by adhoc receipt using a mobile device.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Receiving Ad Hoc - Fluid Page</a>	MIN_NPO_RCV_SEH_FL	Define information for ad hoc receipts.
<a href="#">Receiving Ad Hoc - Add Item Fluid Page</a>	MIN_NPO_RECV_FL	Select items to receive using ad hoc receipts.

### Receiving Ad Hoc - Fluid Page

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

Navigation:

**Mobile Inventory** > **Receiving Ad Hoc**

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

The screenshot shows the 'Receiving Ad Hoc' mobile application interface. The header is dark blue with a back arrow on the left, the title 'Receiving Ad Hoc' in the center, and a flag icon and a menu icon on the right. The main content area contains several input fields:

- \*Business Unit: US015 (with a magnifying glass icon)
- \*Receipt ID: NEXT
- \*Supplier ID: 0000000044 (with a magnifying glass icon)
- Receipt Source: (empty)
- Carrier ID: (empty) (with a magnifying glass icon)
- \*Ship To: US001 (with a magnifying glass icon)
- Pro Number: (empty)

At the bottom center of the page is a green 'Add' button.

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>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	Displays the user's default business unit. You can change the business unit. A business unit is required.
<b>Receipt ID</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 <b>Next</b> . 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 ID</b>	Enter the supplier identification number 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 ID</b>	Enter the freight carrier identification that delivered the shipment.
<b>Ship To</b>	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.
<b>Pro Number</b>	Enter the tracking number assigned to the shipment in which the material arrived.
<b>Add</b>	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."

## Receiving Ad Hoc - Add Item Fluid Page

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

Navigation:

**Mobile Inventory > Receiving Ad Hoc > and click the Add button**



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

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.

<b>Field or Control</b>	<b>Description</b>
<b>Pro Number</b> (progressive number)	<p>Enter the tracking number assigned to the shipment in which the material arrived.</p> <hr/> <p><b>Note:</b> When this field is left blank, the default value is derived from the header page for an added item and on an added line.</p>
<b>Attention To</b> (attention to)	<p>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.</p> <p>If the person selected is a valid value in the PeopleSoft system, then the system populates the <b>Location</b> field. However, you can enter an value in this field that is not in the PeopleSoft system.</p>
<b>Location</b>	<p>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 <b>Location</b> field is required.</p>
<b>Category</b>	<p>Enter the category of the items to add.</p>
<b>Item ID</b>	<p>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 <b>Description</b> field with the item's description and the UOM with the item's standard UOM.</p> <hr/> <p><b>Note:</b> The Item ID field and associated filters support GSI barcode parsing such that the system automatically populates the Item ID when a barcode is scanned.</p>
<b>Description</b> (description)	<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 <b>Description</b> field is required so you must enter a description. This requires you to select the Change Non PO Receipt Price option on the Receiver Setup page.</p> <p>When you enter an item the system does not immediately display the item's description. After you click the <b>Add Item</b> button, the system adds the item to the table and the item description appears with the item.</p>
<b>UOM</b>	<p>Enter the unit of measure used to count items to add.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Receipt Qty</b> (quantity)	Enter the quantity of the item that you are receiving for this ad hoc receipt line. The <b>Qty</b> 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 <b>Pro Number</b> field.</p> <p>For the Receiving Ad Hoc - Receive Item page, the <b>Save</b> button, <b>Header</b> link, and <b>Return to Search</b> 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>
<b>Save</b>	<p>Click to save count of items added.</p> <hr/> <p><b>Note:</b> The system displays a receipt created message at the top of the page briefly.</p> <hr/>
<b>Exit</b>	Click to return to the header page.

You can view item information in a grid and list views and also modify any if necessary.

This example illustrates the fields and controls on the Receiving Ad Hoc - Grid View Fluid Page.

The screenshot displays the 'Receiving Ad Hoc' mobile application interface. The top navigation bar is dark blue with a back arrow, the title 'Receiving Ad Hoc', a flag icon, and a menu icon. Below the navigation bar is a toolbar with icons for adding (+), grid view (selected), list view, and edit (pencil). To the right of the toolbar is a search field labeled 'Find' and a right arrow button. Below the toolbar, it indicates '4 rows'.

Item ID	Receipt Qty	UOM
10000 Long Sleeve Biking Jersey, Men	2	EA
043250 CORTARA BURDUCK BASELINE HALTE	1	EA
001-0294 36F1C PORTABLE CRYOSURGICAL SY	4	BOX
10036 3 Season Mummy Bag, Regular	5	EA

At the bottom of the screen, there are two buttons: a green 'Save' button and a grey 'Exit' button.

This example illustrates the fields and controls on the Receiving Ad Hoc - List View Fluid Page.

The screenshot shows a mobile application interface for 'Receiving Ad Hoc'. At the top, there is a dark blue header with a back arrow, the title 'Receiving Ad Hoc', a flag icon, and a menu icon. Below the header is a toolbar with icons for adding (+), grid view, list view (highlighted in green), and edit (pencil). To the right of the toolbar is a 'Find' search box and a right-pointing arrow button. Below these is a '4 rows' indicator and a minus sign button. The main form area contains several fields: '\*Item ID' with the value '10000', 'Description' with 'Long Sleeve Biking Jersey, Men', '\*Category' with 'CYCLING', 'Attention To' with an empty search box, '\*Location' with 'US001' and a search box, 'Pro Number' with an empty search box and a 'Multiple' label, '\*Receipt Qty' with a spinner set to '2', and '\*UOM' with 'EA' and a search box. At the bottom, there are two buttons: a green 'Save' button and a grey 'Exit' button.

This example illustrates the fields and controls on the Receiving Ad Hoc - Multiple Pro Numbers Fluid Page.

Cancel	Pro Numbers	Done
Item ID	10000	
Description	Long Sleeve Biking Jersey, Men	
Vendor ID	0000000044	
Pro Number	<input type="text"/>	
	<input type="button" value="Add"/>	
4 rows		
Pro Number		Remove
<input type="text" value="12587"/>		<input type="button" value="−"/>
<input type="text" value="14569"/>		<input type="button" value="−"/>
<input type="text" value="478598"/>		<input type="button" value="−"/>
<input type="text" value="125478"/>		<input type="button" value="−"/>

This example illustrates the fields and controls on the Receiving Ad Hoc - Edit View Fluid.

The screenshot shows a mobile application interface for editing a Receiving Ad Hoc record. The title bar at the top is dark blue with a back arrow, the text "Receiving Ad Hoc", a flag icon, and a menu icon. Below the title bar are four icons: a plus sign, a grid, a list, and a pencil. The main content area is divided into two sections. The top section contains pre-filled text: "Business Unit US001", "Receipt ID NEXT", "Supplier ID 0000000045", and "Ship To US001". The bottom section contains three input fields: "Receipt Source" (empty), "Carrier ID" (empty with a search icon), and "Pro Number" (empty). At the bottom of the screen are two buttons: a green "Save" button and a grey "Exit" button.

This example illustrates the fields and controls on the Receiving Ad Hoc - Receipt Creation Fluid Page.

The screenshot displays a mobile application interface for creating a receipt. At the top, a dark blue header contains a back arrow, the title "Receiving Ad Hoc", a flag icon, and a menu icon. Below the header is a green notification bar with the text "Receipt Created(US001/0000000074) X". The main form area contains several input fields:

- \*Receipt ID: A text input field containing "NEXT".
- \*Supplier ID: A text input field containing "0000000044" with a magnifying glass search icon to its right.
- Receipt Source: An empty text input field.
- Carrier ID: An empty text input field with a magnifying glass search icon to its right.
- \*Ship To: A text input field containing "US001" with a magnifying glass search icon to its right.
- Pro Number: An empty text input field.

At the bottom of the form is a green "Add" button.



## Chapter 6

# Using Mobile Inventory Putaway

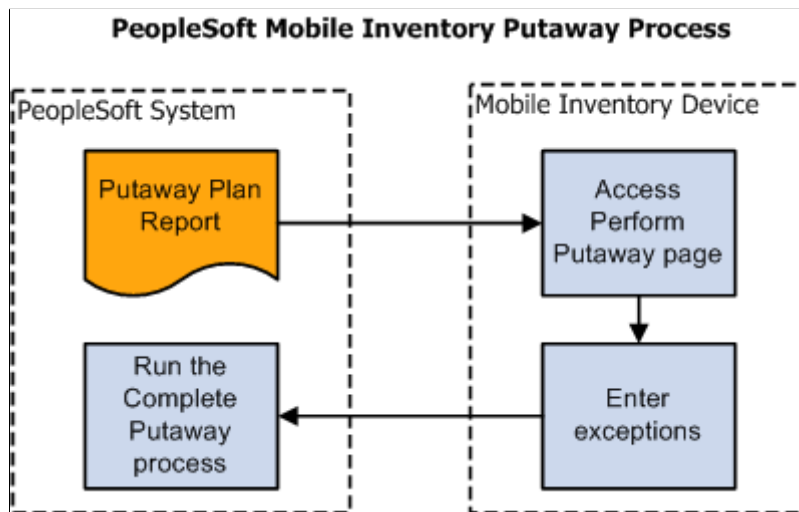
## Understanding PeopleSoft Mobile Inventory Putaway

This topic 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.

This diagram illustrates the PeopleSoft Mobile Inventory Putaway process:



## How to Putaway Stock Using a Mobile Device

This topic 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 topic discusses how to setup options for mobile putaway.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Define installation options for the Perform Putaway task flow
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for the Perform Putaway task flow.

### Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define installation options for the Perform Putaway task flow.

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory - Fluid.**

Select Perform Putaway in the Task Flow field.

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

The screenshot shows the 'Mobile Inventory - Fluid' configuration page. Under 'System Options', there is a 'Key Concatenation Separator' field with a backslash character, a 'Role Name' dropdown set to 'MIN User', and three checkboxes: 'Delivery Signature Required' (unchecked), 'Use Barcode Symbology ID' (checked), and 'Parse Barcode to Multi-Fields' (checked). The 'Task Options' section features a 'Task Flow' dropdown set to 'Perform Putaway', '\*Initial Display Mode' dropdown set to 'All Items Grid', and '\*All Item Filter' dropdown set to 'Display All'. Below these are 'Show on Page' checkboxes: 'Lookups' (checked), 'Description' (checked), 'MFG Item ID' (unchecked), 'Find' (checked), 'Filter All Alternate Items' (unchecked), and 'Enable Auto Kick off Putaway' (unchecked).

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 - Fluid page. During the task flow session some values can override the installation values, the user preferences values, or both .

<b>Field or Control</b>	<b>Description</b>
<b>Task Flow</b>	Identifies the Mobile Inventory Management task flow that uses the settings on this page. Select <i>Perform Putaway</i> to define installation-level options for the Perform Putaway task flow.
<b>Rows Displayed</b>	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.
<b>Lookups</b>	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.
<b>Description</b>	Select to display the item descriptions on the Perform Putaway 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 Perform Putaway page.

<b>Field or Control</b>	<b>Description</b>
<b>Display Filter Related Fields</b>	Select this check box to display the <b>Filter</b> field and <b>Filter</b> button on the Perform Putaway page. Deselect this check box to remove the filter functionality from the pages.
<b>Display Show/Hide in tables</b>	Select to display the <b>Show/Hide</b> icon on Perform Putaway pages. You can use this icon to manually expand and collapse extra line information.  <b>Note:</b> When not selected the system only displays basic information for each row in the table.
<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 the system should not use alternate item identifiers to filter the table. This can improve system performance for the task flow.
<b>Enable Auto Kick off Putaway</b>	Select this check box to enable the complete putaway process for all the selected items on the <u>Perform Putaway - Fluid Page</u> .  By default, the Enable Auto Kick off Putaway is unchecked.

## User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) to define user preferences for the Perform Putaway task flow.

Navigation:

**Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid**

Select Perform Putaway in the Task Flow field.

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

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

<b>Field or Control</b>	<b>Description</b>
<b>Use Installation Values</b>	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 <a href="#">Installation Options - Mobile Inventory - Fluid Page</a> .

## Performing Putaway Using the PeopleSoft Fluid User Interface on a Mobile Device

This topic discusses how to perform a putaway using a mobile device:

### Pages Used to Perform Putaway Using a Mobile Device

Use these pages to perform putaway using a mobile device:

<b>Page Name</b>	<b>Usage</b>
<a href="#">Perform Putaway - Fluid Search Page</a>	Search for putaway plans.
<a href="#">Perform Putaway - Fluid Page</a>	Confirm stock to putaway.

### Perform Putaway - Fluid Search Page

Use the Perform Putaway- Fluid Search page to search for putaway plans.

Navigation:

**Mobile Inventory > Perform Putaway. Enter a business unit and plan ID and click the Search button.**

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

The screenshot shows a mobile application interface for 'Perform Putaway'. The header is dark blue with a back arrow on the left, the title 'Perform Putaway' in the center, and a flag icon and a menu icon on the right. Below the header, there are two input fields. The first field is labeled '\*Business Unit' and contains the text 'US010'. The second field is labeled '\*Plan ID' and contains the text '1'. Both fields have a magnifying glass icon on the right side. At the bottom center of the page, there is a green button with the text 'Search'.

Use this page to select a putaway plan.

<b>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	Displays the putaway business unit from the user's default business unit. You can change the business unit. The field is required.

<i>Field or Control</i>	<i>Description</i>
<b>Plan ID</b>	Enter or look up a putaway plan ID. <hr/> <b>Note:</b> It is required to enter a plan ID. <hr/>

## Perform Putaway - Fluid Page

Use the Perform Putaway- Fluid page to confirm stock to putaway.

Navigation:

**Mobile Inventory > Perform Putaway. Enter needed criteria and click Save.**

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

<
Plan ID US010\1
🚩
☰

📊
☰

Find

Confirm All
 11 rows

Item ID	Quantity	Conf
10100 Weight Forward Fly Line, Sinking AREA3\A1\R2\B1	<input style="width: 60px;" type="text" value="9600"/> EA	<input type="checkbox"/>
10101 Rocket Taper Fly Line, Sinking AREA1\11	<input style="width: 60px;" type="text" value="9600"/> EA	<input type="checkbox"/>
10103 Hot Pink Sparkler AREA1\11	<input style="width: 60px;" type="text" value="9600"/> EA	<input type="checkbox"/>
10104 Orange Wiggle Tail AREA1\11	<input style="width: 60px;" type="text" value="9600"/> EA	<input type="checkbox"/>
10105 All-Round Dry Flies and Nymphs AREA1\11	<input style="width: 60px;" type="text" value="800"/> DOZ	<input type="checkbox"/>
10106 Bonefish and Permit Flies AREA1\11	<input style="width: 60px;" type="text" value="800"/> DOZ	<input type="checkbox"/>

Save

Exit



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

The screenshot displays a mobile application interface for 'Plan ID US0101'. At the top, there is a navigation bar with a back arrow, a flag icon, and a menu icon. Below the navigation bar, there are icons for a grid and a list view, and a search box labeled 'Find'. A 'Confirm All' checkbox and '11 rows' indicator are present. The main content area lists three items, each with the following fields: Item ID, Description, Storage Location, Quantity (input field), UOM, a 'Confirmed' checkbox, and a 'More Information' link. At the bottom, there are 'Save' and 'Exit' buttons.

Item ID	Description	Storage Location	Quantity	UOM	Confirmed	More Information
10100	Weight Forward Fly Line, Sinking	AREA3\A1\R2\B1	9600	EA	<input type="checkbox"/>	<a href="#">More Information</a>
10101	Rocket Taper Fly Line, Sinking	AREA1\1	9600	EA	<input type="checkbox"/>	<a href="#">More Information</a>
10103	Hot Pink Sparkler	AREA1\1	9600	EA	<input type="checkbox"/>	<a href="#">More Information</a>

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

Plan ID US010\1

Find

Item ID 10100

Description Weight Forward Fly Line, Sinking

Storage Location AREA3\A1\R2\B1

Container ID

Quantity 9600

UOM EA

Confirmed

Comments

Staging ID 1

Line 75

Receipt No. 0000000011

PO ID 0000000016





Supplier SCM0000003

Item 1 of 11

Save Exit

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

<b>Field or Control</b>	<b>Description</b>
<b>Conf</b>	Click to confirm the item displayed on the selected row .

<b>Field or Control</b>	<b>Description</b>
<b>Confirm All</b>	Click to confirm all of the items displayed on the Perform Putaway page.
	Click to split the current line.
	Click to assign a given quantity among cross dock and default putaway locations.
	Click to change the storage location of the current line,
	Displayed for lines split in the current operation. Click to delete.
<b>Save</b>	<p>Click to indicate that the selected putaway lines are ready to be processed by the Complete Putaway process.</p> <hr/> <p><b>Note:</b> If Auto Kick off Putaway is enabled on the <a href="#">Installation Options - Mobile Inventory - Fluid Page</a>, a confirmation message appears on clicking <b>Save</b>. Click <b>Yes</b> to kick off the complete Putaway process. Click <b>No</b> to save the putaway transaction and return to the search page.</p> <hr/>
<b>Exit</b>	Click to discard changes and exit to the Putaway search page.

## Related Links

[Setting Up Installation Options and User Preferences](#)



## Chapter 7

# 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.

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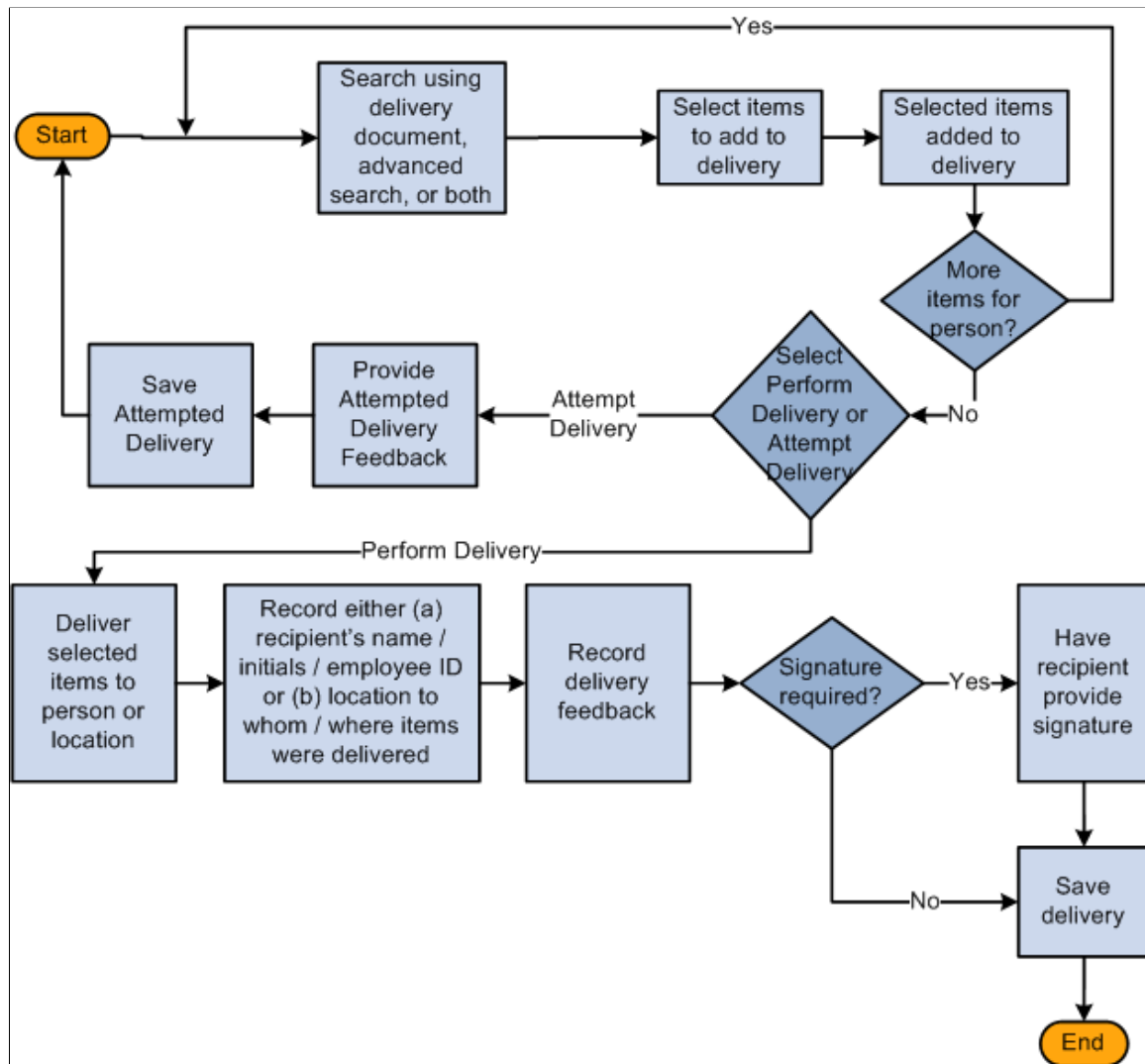
## Process Flow for Mobile Delivery

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).

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.

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**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 topic discusses how to setup PeopleSoft for use with mobile delivery.



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

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Establish Mobile Delivery installation options.
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	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 Page	BUS_UNIT_TBL_PM2	Determine if a signature is required from the individual receiving a delivery for the receiving business unit.
<u>Delivery Feedback Page</u>	MIN_DLV_FEEDBACK	Set up delivery feedback codes and descriptions.

### Installation Options - Mobile Inventory - Fluid Page

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

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

Select Delivery in the Task Flow field.

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

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.

<b>Field or Control</b>	<b>Description</b>
<b>Delivery Signature Required</b>	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.
<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>Field or Control</b>	<b>Description</b>
<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> <ul style="list-style-type: none"> <li>• <i>Item ID</i>: Select to sort the items and locations on the Perform Delivery page by item ID. This is the default value for the installation options.</li> <li>• <i>Deliver To</i>: Select to sort the items and locations on the Perform Delivery page by the requester.</li> </ul>
<b>Rows Displayed</b>	Enter the maximum number of rows that you want to display in the tables for the Mobile Delivery task flow.
<b>Lookups</b>	Select this check box to display the <b>Lookup</b> icon for all the search fields Delivery pages on the mobile device. The <b>Lookup</b> icon enables you to view a list of options and select one.
<b>Description</b>	<p>Select to display the item descriptions on the Delivery pages on the mobile device.</p> <hr/> <p><b>Note:</b> The system ignores this setting when an item is a description only item.</p> <hr/>
<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 <b>Delivery Document</b> field is to remain populated after a delivery is saved.

<b>Field or Control</b>	<b>Description</b>
<b>Default Delivered To</b>	<p>Select to indicate that the Mobile Delivery task flow should attempt to provide a default value for the <b>Delivered To</b> field that is based on a hard-coded hierarchy of fields.</p> <p>If this check box is selected, the system defaults the <b>Delivered To</b> field to:</p> <ul style="list-style-type: none"> <li>• The <b>Attention To</b> field, if the <b>Attention To</b> value is the same across all receipt distribution lines in the delivery.</li> <li>• The <b>Requester Name</b> field, if the <b>Attention To</b> field value is not the same across all delivery lines, and the <b>Requester Name</b> field value is the same across all receipt distribution lines in the delivery.</li> <li>• The <b>Location</b> field, if the Requester Name field value is not the same across all delivery lines, and the Location field value is the same across all receipt distribution lines in the delivery.</li> <li>• If none of the three fields are the same, the system does not provide a default value for the <b>Delivered To</b> 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>Display Filter Related Fields</b>	Select to display the <b>Filter</b> field and <b>Filter</b> and <b>Clear</b> buttons on Mobile Delivery pages. Deselect the check box to remove the filter functionality from the pages.
<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>
<b>Display Show/Hide information</b>	<p>Select to display the <b>Show/Hide</b> icon on Delivery pages. You can use this icon to manually expand and collapse additional item information sections.</p> <hr/> <p><b>Note:</b> When not selected the system only displays basic information for each row in the table.</p> <hr/>

## User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) 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 > Define User Preferences > Mobile Inventory - Fluid**

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 - Fluid Page](#) .

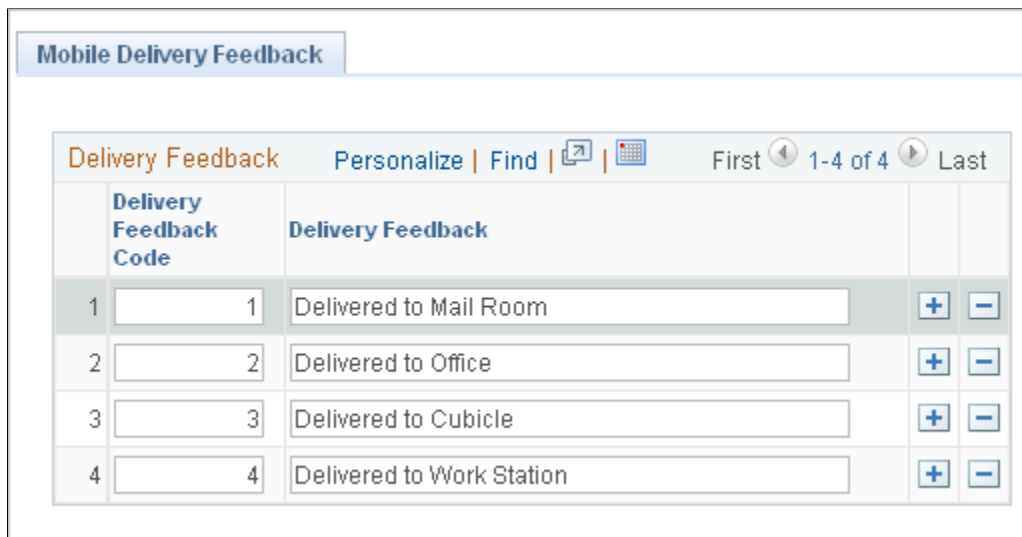
## Delivery Feedback Page

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

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.



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

<b>Field or Control</b>	<b>Description</b>
<b>Feedback Code</b>	Enter a feedback code for use with the Mobile Delivery task flow. The field value must be numeric and is limited to three numbers.

<i>Field or Control</i>	<i>Description</i>
<b>Delivery Feedback</b>	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.

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## Processing Deliveries Using the PeopleSoft Fluid User Interface on Mobile Devices

This topic discusses how to process deliveries using mobile devices.

### Pages Used to Process Mobile Delivery Using Mobile Devices

Use these pages to process mobile deliveries.

<i>Page Name</i>	<i>Usage</i>
<u>Delivery - Fluid Search Page</u>	our repository Search for items to add to a delivery.
<u>Delivery - Fluid Add Item to Delivery Page</u>	Search for and add more Items for delivery.
<u>Delivery - Fluid Perform Delivery Page</u>	Perform or attempt delivery of items.

### Delivery - Fluid Search Page

Use the Delivery - Fluid Search page to search for items to add to a delivery.

Navigation:

**Mobile Inventory > Delivery > and enter search criteria**

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

**Delivery** ⋮

\*Business Unit

Delivery Document

▼ **Advanced Search**

---

Receipt Number

Delivery Cart

Item ID

PO Unit

PO Number

Ship To

Received Date

Attention To

Location

Requester

Pro Number

Delivery Done?  No

**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>Field or Control</b>	<b>Description</b>
<b>Business 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>Field or Control</b>	<b>Description</b>
<b>Delivery Document</b>	<p>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.</p> <p>If the <b>Save Delivery Document</b> 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.</p>
<b>Search</b>	<p>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.</p>
<b>Advanced Search</b>	<p>Click to enter advanced search criteria for receipt lines. For example you can define specific item IDs, receipt dates, and requesters.</p> <hr/> <p><b>Note:</b> Searches are not case sensitive and partial searches are possible for all of the advanced search fields, except for the <b>Unit</b> and <b>PO Unit</b> (purchase order business unit) fields, which must be exact, and the <b>Receipt Date</b> field. If the system does not find results based on the advanced search criteria, the Advanced Search area remains expanded.</p> <hr/>
<b>Receipt Number</b>	<p>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.</p>
<b>Delivery Cart</b>	<p>Select a delivery cart on which to base the search. On searching, the system displays all active delivery carts for the receiving business unit.</p> <hr/> <p><b>Note:</b> You can define the default delivery cart on the Setup Delivery Cart page to display on this page.</p> <hr/>



<b>Field or Control</b>	<b>Description</b>
<b>Item ID</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> <hr/> <p><b>Note:</b> This field also supports barcode scanning.</p> <hr/> <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</b> (purchase order unit)	<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 <b>Lookup</b> icon to locate and select a business unit.</p>
<b>PO Number</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 Number <b>Lookup</b> icon to work. You can use the <b>Lookup</b> icon to locate and select a purchase order number.</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 <b>Lookup</b> icon to locate and select a ship to location.</p>
<b>Received 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 <b>Lookup</b> 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 <b>Lookup</b> icon.</p>
<b>Requester</b>	<p>Select the requester for whom you want to search for receipt lines to deliver. You can use the <b>Lookup</b> icon.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Pro Number</b> (progressive number)	<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>
<b>Delivery Done?</b>	<p>Set this toggle button to Yes or No to search for items by their delivery status.</p> <p>If <b>Delivery Done?</b> is yes, the search result displays the items that were delivered. If No is selected, the search result displays the items that were not delivered.</p>

## Delivery - Fluid Add Item to Delivery Page

Use the Delivery - Fluid Add Item to Delivery page to search for and add more Items for delivery.

Navigation:

**Mobile Inventory > Delivery > select items for delivery and click the Add to Delivery button.**

This example illustrates the fields and controls on the Delivery - Fluid Add Item to Delivery page. You can find definitions for the fields and controls later on this page.

**Delivery** ⋮

\*Business Unit

Delivery Document

[Advanced Search](#)

Find

580 rows

Item ID	Receipt Qty	Delivered To
<input type="checkbox"/> 10000 Long Sleeve Biking Jersey, Men's	100 EA	Calvin Roth
<input type="checkbox"/> 10000 Long Sleeve Biking Jersey, Men's	100 EA	Kenneth Schumacher
<input type="checkbox"/> 10000 Long Sleeve Biking Jersey, Men's	100 EA	Kenneth Schumacher
<input type="checkbox"/> 10000 Long Sleeve Biking Jersey, Men's	20 EA	
<input type="checkbox"/> 10000 Long Sleeve Biking Jersey, Men's	100 EA	Kenneth Schumacher
<input type="checkbox"/> 10000 Long Sleeve Biking Jersey, Men's	500 EA	Kenneth Schumacher
<input type="checkbox"/> 10002 Long Sleeve T-Shirt, Mens	25 EA	Kenneth Schumacher

2

**Note:** If no matching search results is found, the Find function is not available and the field is not displayed.

<b>Field or Control</b>	<b>Description</b>
<input checked="" type="checkbox"/>	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.
<input type="checkbox"/>	Click to deselect all of the items in the list.

<b>Field or Control</b>	<b>Description</b>
<b>Add To Delivery</b>	<p>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 View Delivery button with the number of items added to the delivery, and then resets the Delivery page.</p> <hr/> <p><b>Note:</b> If you sign on the Delivery page to add or delete an item, a pop up message seeks confirmation of changes.</p> <hr/>
<b>View Delivery</b>	Click to open the Delivery — Fluid Perform Delivery page.
<b>Exit</b>	Click to discard changes and exit to the Delivery — Fluid Search page.

## Delivery - Fluid Perform Delivery Page

Use the Delivery Cart - Fluid Perform Delivery page to perform or attempt delivery of items.

Navigation:

**Mobile Inventory > Delivery > View Delivery button**

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

**Delivery** ⋮

Find

Action Delivery

Delivered To

USA - New York

[> Feedback Signature](#)  
[Comments & Attachments](#)

**2 rows**

☰
☰
✖

Item ID	Quantity	Delivered To	Remove
<a href="#">10000</a> Long Sleeve Biking Jersey, Men's	50 EA	US001	<input style="width: 30px; height: 20px;" type="button" value="−"/>
<a href="#">10002</a> Long Sleeve T-Shirt, Men's	100 EA	US001	<input style="width: 30px; height: 20px;" type="button" value="−"/>

Save
Add Item
Exit

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

**Delivery** ⋮

Find

Action Delivery

Delivered To

USA - New York

[> Feedback Signature](#)  
[Comments & Attachments](#)

**2 rows**

☰
☰
✕

Item ID 10000

Description Long Sleeve Biking Jersey, Men's

Quantity 50 -

UOM EA

Delivered To US001

[> More Information](#)

---

Item ID 10002

Description Long Sleeve T-Shirt, Men's

Quantity 100 -

UOM EA

Delivered To US001

[> More Information](#)

Save
Add Item
Exit

<b>Field or Control</b>	<b>Description</b>
<b>Find</b>	Enter data to filter by.
<b>Action</b>	<p>Use the toggle the switch to modify the option. The available actions are :</p> <ol style="list-style-type: none"> <li>1. Delivery</li> <li>2. Attempt Delivery</li> </ol> <hr/> <p><b>Note:</b> Delivery is the system assigned default value. Also if Attempt Delivery is selected, Delivered To and Signature functions are not available and the associated fields do not display.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Delivered To</b>	<p>Enter the employee name. The employee information needs to be entered manually, since the MIN_ATTN_TO table searches for only the Employee ID and Badge details.</p> <p>You can also scan a bar code, such as an employee badge number or a location bar code. If you change this value all lines in the delivery change accordingly.</p> <hr/> <p><b>Note:</b> The system populates the <b>Delivered To</b> field if the <b>Default Delivered To</b> 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.</p> <hr/> <p><b>Note:</b> Mobile Inventory Delivery has not integrated the Deliver To field with HR tables directly. It only searches for the Employee ID and Employee Badge Number in the MIN_ATTN_TO table. You must manually populate the table with the employee information.</p>
<b>Code</b>	<p>Select a code that automatically updates the <b>Feedback</b> field. Codes are defined in the PeopleSoft system Delivery Feedback component.</p>
<b>Feedback</b>	<p>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.</p> <p>The <b>Code</b> field is not required to enter free-form text into the <b>Feedback</b> field.</p>
<b>Signature</b>	<p>Click to open the signature area where you can capture and record a signature for the delivery.</p> <hr/> <p><b>Note:</b> If you sign using this option to add or delete an item, a pop up message also seeks confirmation of changes.</p>
<b>Comments &amp; Attachments</b>	<p>Click this link to enter delivery comments and upload attachments. For more details, see <a href="#">Delivery Comments &amp; Attachments - Fluid Page</a>.</p>
<b>Add Item</b>	<p>Click to add one or more items to the delivery.</p>
<b>Save</b>	<p>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.</p>

<i>Field or Control</i>	<i>Description</i>
<b>Exit</b>	Click to discard changes and exit to the Delivery search page.

## Related Links

[Setting Up Installation Options and User Preferences](#)

## Delivery Comments & Attachments - Fluid Page

Use the Delivery Comments & Attachments - Fluid Page to enter comments and upload the attachments.

Navigation:

**Mobile Inventory > Delivery > View Delivery button > Comments & Attachments**

This example illustrates the fields and controls on the Delivery - Comments & Attachments Page.

**Comments & Attachments**

Business Unit US001

**Comments**

Comments

246 characters remaining

**Attachments** 2 rows

View ↑↓	Description ↑↓	User ID ↑↓	Date/Time Stamp ↑↓	Name ↑↓	
Attachment_2.txt	Description	VP1	12/01/2023 9:50:37AM	Kenneth Schumacher	—
Attachment_1.txt	Description	VP1	12/01/2023 9:50:37AM	Kenneth Schumacher	—

Add Attachment

For fields and definitions, see [Comments & Attachments - Fluid Page](#).

To configure attachment upload limit, see “Installation Options - Multiple Attachments Page” (Application Fundamentals).

## Comments & Attachments for Delivered Items

If the items are delivered with comments and attachments, search for them by selecting the *Delivery Done?* toggle button Yes. Click the *Comments & Attachments* link on the [Delivery - Fluid Perform Delivery Page](#) to only view the added comments and attachments for the delivered items.

For multiple line items, comments and attachments appear in sequence one after another with the Item ID.



This example illustrates the fields and controls on the Delivery - Comments & Attachments Page for Delivered Items.

Cancel
Comments & Attachments
Done

**Comments**

Business Unit US001  
 Receipt Number 000000023  
 Item ID 10000  
 Receiver Shipping Sequence 1  
 Distribution Line 1  
 Receipt Line 1

Add Attachment

**Attachments** 2 rows

	View	Attached File	Description	Last Update User ID	Last Update Date/Time	Name
1	<a href="#">View</a>	Attachment_2.txt	Description	VP1	12/01/2023 9:50:37AM	Kenneth Schumacher
2	<a href="#">View</a>	Attachment_1.txt	Description	VP1	12/01/2023 9:50:37AM	Kenneth Schumacher

**Comments**

Business Unit US001  
 Receipt Number 000000012  
 Item ID 10002  
 Receiver Shipping Sequence 1  
 Distribution Line 1  
 Receipt Line 1

Add Attachment

**Attachments** 2 rows

	View	Attached File	Description	Last Update User ID	Last Update Date/Time	Name
1	<a href="#">View</a>	Attachment_2.txt	Description	VP1	12/01/2023 9:50:37AM	Kenneth Schumacher
2	<a href="#">View</a>	Attachment_1.txt	Description	VP1	12/01/2023 9:50:37AM	Kenneth Schumacher

**Note:** You can only view the comments and attachments on this page. You cannot modify or delete it. To delete the comments and attachments, deselect the *Delivered* check box for that specific line item ID on the “Maintain Delivery Information - Delivery Location Page” (PeopleSoft Purchasing). It will delete the comments and attachments and make the line item undelivered. If the same comments and attachments are added for multiple items, then deselecting the *Delivered* check box will delete the comments and attachments only for the selected line item. Other items will contain the same comments and attachments.

## Viewing Delivery History

This topic discusses how to view delivery history.

### Pages Used to View Delivery History

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Delivery Detail Page</a>	RECV_DEL_INQ_DTL	Review delivery information for a receipt.
<a href="#">Life Cycle Inquiry Page</a>	RECV_DEL_INQ_CYCLE	View the life cycle of a delivery.
<a href="#">Delivery Location Page</a>	RECV_DELIVERY1	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.**

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

Delivery Detail

Unit US001      Receipt No 0000000003      Ship To

**Receipt Lines**

Line	Item ID	Description	Due Date	Ship To	Distribution Qty	EA
2	EX2009	Calculator, Electric	07/13/2000	US001	25.0000	EA

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

Delivered Flag      Date 04/06/2014 10:38PM

Deliverer Kenneth Schumacher      Attention To  
Delivered To  
Requester Kenneth Schumacher      Delivery Cart ID  
Location US001 USA - New York      Distribution Line 1  
Address 1 144 North Street      Distribution Qty 25.0000  
Address 2      Building #  
Address 3      Floor #  
Address 4      Telephone  
City New York      Extension  
County      Fax  
Postal Code 10168      State NY

Delivery Feedback Item Delivered      Delivery Life Cycle

Delivery Signature

See “Delivery Detail Page” (PeopleSoft 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.**

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

Life Cycle Inquiry

<b>Business Unit:</b> US001	<b>Due Date:</b> 07/11/2000
<b>Receipt Number:</b> 0000000001	<b>Ship To:</b> US001
<b>Distribution:</b> 1/1/1	<b>Item ID:</b> 10000 Long Sleeve Biking Jersey, Men's
<b>Requester:</b>	<b>Location:</b>
<b>Delivery Status:</b> Received	<b>Distribution Qty:</b> 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**

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.

**Delivery Location** | Location Comments | Ship To Comments

Unit US001    Receipt No POAP-TOL    Ship To US001

---

**Receipt lines** Find | View All | First 1 of 1 Last

Line 1	Item ID	Flower Pot	Due Date 05/06/2005	Ship To US001	Supplier Accept Qty 500.0000 EA
--------	---------	------------	---------------------	---------------	---------------------------------

---

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

<input type="checkbox"/> Delivered    Date <input type="text"/> <input type="text"/> Delivered Time <input type="text"/> Deliverer <input type="text"/> Requester Kenneth Schumacher Location US001 USA - New York Address 1 144 North Street Address 2 Address 3 Address 4 City New York County Postal Code 10168    State NY Delivery Feedback <input style="width: 100%;" type="text"/>	Delivered To <input style="width: 100%;" type="text"/> Attention To Delivery Cart ID Distribution Line 1 Distribution Qty 500.0000 Building # Floor # Telephone Extension Fax
---	--

<i>Field or Control</i>	<i>Description</i>
<b>Delivered</b>	If this check box is cleared, the system clears the Delivery Signature fields as well as other delivered fields.

See “Accessing Delivery Information” (PeopleSoft Purchasing).

---

## Setting Up and Using Mobile Delivery Carts in the PeopleSoft Fluid User Interface

This topic provides an overview of how to add items to a delivery cart and discusses how to setup and use mobile delivery carts.

### Pages Used to Set up and Use Mobile Delivery Carts in the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Usage</i>
<u>Delivery Cart - Fluid Search Page</u>	Search for delivery carts.
<u>Delivery Cart - Fluid Add Item To Cart Page</u>	Search for and add items to the delivery cart.
<u>Delivery Cart - Fluid Maintain Items in Cart Page</u>	View or remove items present in the delivery cart

### Delivery Cart - Fluid Search Page

Use the Delivery Cart - Fluid Search page to search for delivery carts.

Navigation:

**Mobile Inventory > Delivery Cart.**

This example illustrates the fields and controls on the Delivery Cart - Fluid Search page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Delivery Cart' page with the following elements:

- Header: Back arrow, 'Delivery Cart' title, flag icon, and menu icon.
- Search Fields:
  - \*Business Unit: Input field containing 'US015' with a search icon.
  - Delivery Cart: Input field with a search icon.
- Search Results:
  - Section title: 'Search Results'.
  - Indicator: '2 rows'.
  - Table:
 

Delivery Cart	Description
CARTA	CART A >
CARTB	Cart B >
- Bottom: A green 'Search' button.

Use this page to search for active delivery carts.

---

**Note:** If you define a business unit all delivery carts under that are displayed.

---

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.

<b>Field or Control</b>	<b>Description</b>
<b>Business 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 Cart</b>	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.
<b>Search</b>	Click this button to search for active delivery carts that match the criteria that you enter. The system displays the matching carts.

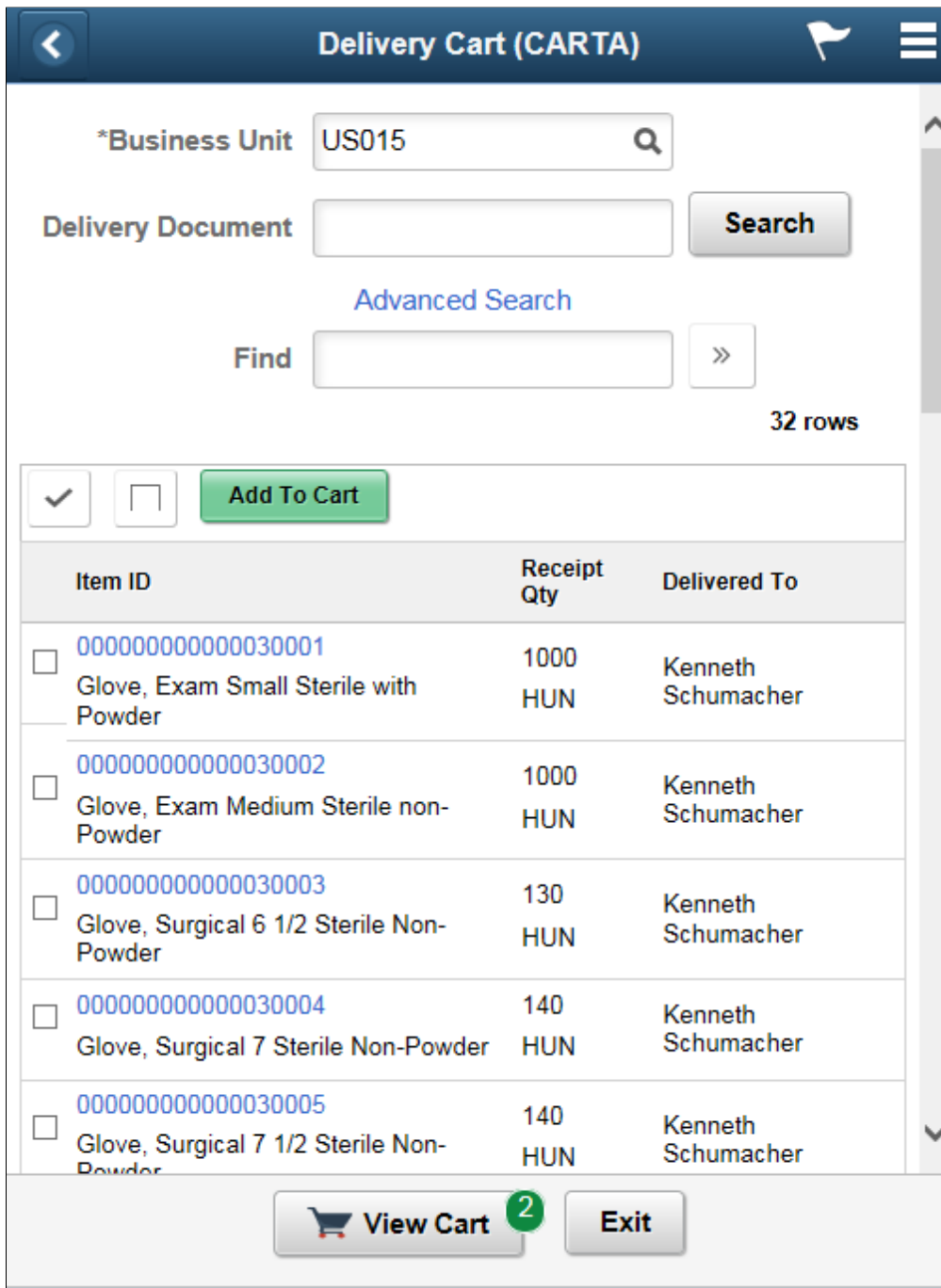
## Delivery Cart - Fluid Add Item To Cart Page

Use the Delivery Cart - Fluid Add Item To Cart page to search for and add items to the delivery cart.


Navigation:


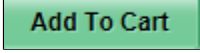
**Mobile Inventory > Delivery Cart > and enter search criteria**

This example illustrates the fields and controls on the Delivery Cart - Fluid Add Item to Cart Page. You can find definitions for the fields and controls later on this page.



**Note:** Click an Item ID link to view the item details page.

<i>Field or Control</i>	<i>Description</i>
	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.

<b>Field or Control</b>	<b>Description</b>
	Click to deselect all of the items in the list.
	<p>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 View Delivery button with the number of items added to the delivery, and then resets the Delivery page.</p> <hr/> <p><b>Note:</b> If you sign on the Delivery page to add or delete an item, a pop up message seeks confirmation of changes.</p> <hr/>
<b>View Cart</b>	Click to open the Delivery Cart — Fluid Maintain Items in Cart page.
<b>Exit</b>	Click to discard changes and exit to the Delivery — Fluid Search page.

## Delivery Cart - Fluid Maintain Items in Cart Page

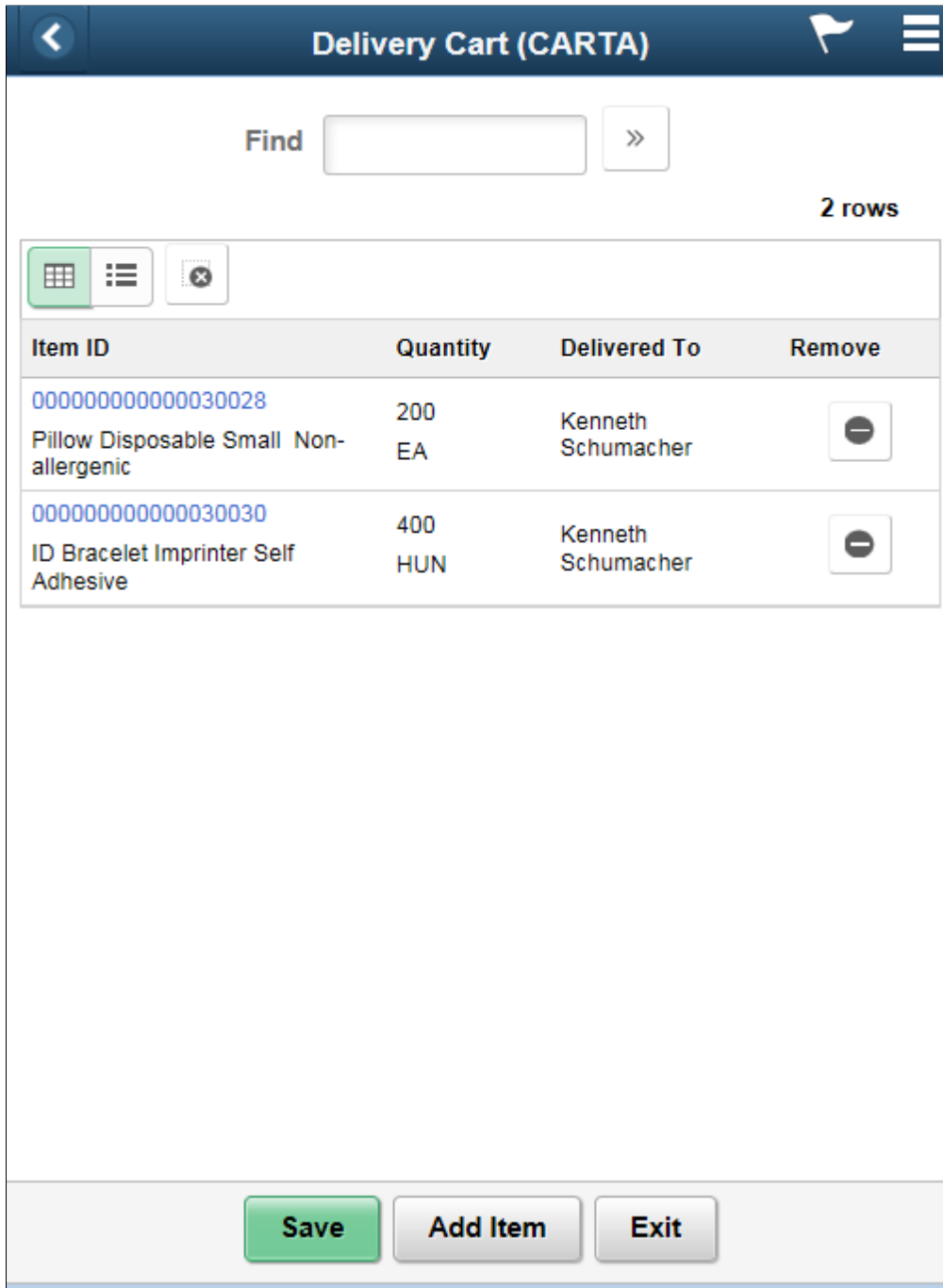
Use the Delivery Cart - Fluid Maintain Items in Cart page to view or remove items present in the delivery cart .

Navigation:

**Mobile Inventory > Delivery Cart > View Delivery button**

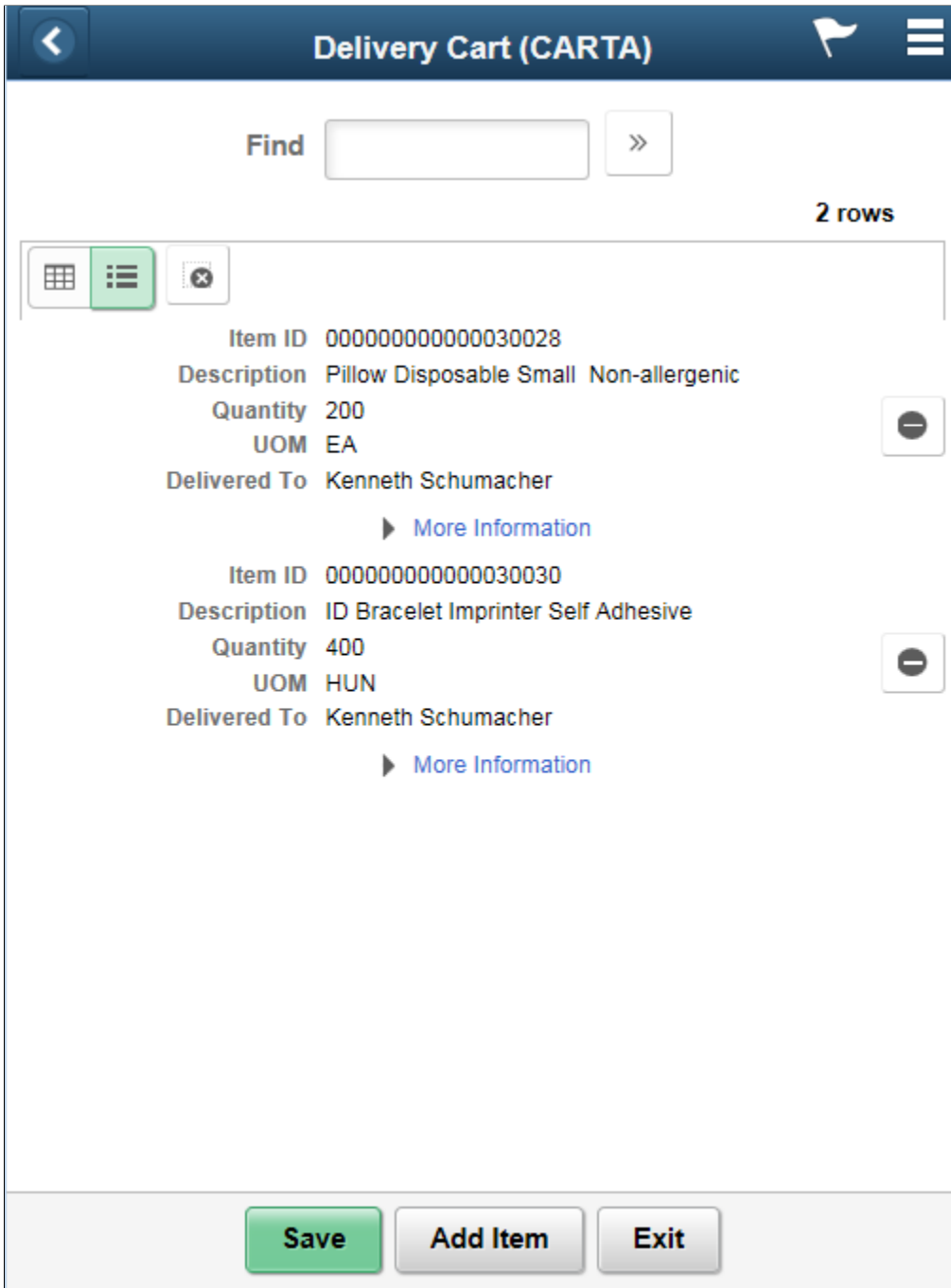


This example illustrates the fields and controls on the Delivery Cart- Fluid Maintain Items in Cart Grid Mode page. You can find definitions for the fields and controls later on this page.





**Note:** Click an Item ID link to view the item details page.

This example illustrates the fields and controls on the Delivery Cart - Fluid Maintain Items in Cart List Mode Page. You can find definitions for the fields and controls later on this page.



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.

<b>Field or Control</b>	<b>Description</b>
	Click to remove one item from the cart.
	Click to remove all items from the cart.
<b>Add Item</b>	Click to access the Add Items page where you can add items by delivery document or search for items to add to the cart.
<b>Save</b>	<p>Click to save item modifications to a cart. When item modifications are saved, the system displays a message indicating that the cart is saved.</p> <p>After adding items to a cart, you must return to this page and click the <b>Save</b> button to save the items to the cart.</p> <p>A transaction is written to the delivery transaction history table:</p> <ul style="list-style-type: none"> <li>• If items are added to a delivery cart, then the transaction type is <i>Added to Delivery Cart</i>, and can be viewed on the Life Cycle Inquiry page.</li> <li>• If items are removed from a delivery cart, then the transaction type is <i>Removed from Delivery Cart</i>, and can be viewed on the Life Cycle Inquiry page.</li> </ul> <p>If the <b>Save Delivery Document</b> 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.</p>
<b>Exit</b>	Click to discard changes and exit to the Delivery search page.

## Related Links

[Setting Up Installation Options and User Preferences](#)

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## Printing a Delivery Report

This topic discusses how to print a delivery report.

## Page Used to Print a Delivery Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Receipt Delivery Page	RUN_POY5030	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**

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

**Receipt Delivery**

Run Control ID: RECV-DLY-DVP1    Report Manager    Process Monitor    **Run**

Language: English

**Report Request Parameters**

Business Unit: US001

Receipt No: SBIPOREC

Location:

From Date:

Through Date:

Use this page to create a Receipt Delivery Detail Report (POY5030 for a BI Publisher report).

## Chapter 8

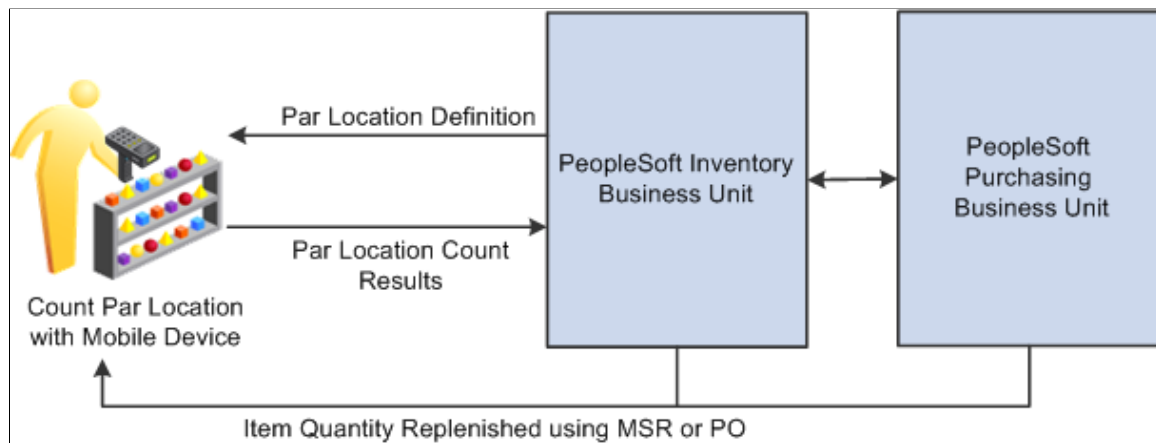
# Counting Par Locations Using a Mobile Device

## 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:

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 Inventory).

PeopleSoft Mobile Inventory provides two separate task flows to enter count quantities for par locations.

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 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).

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## Common Elements Used to Understand Mobile Par Location Counts

<i>Field or Control</i>	<i>Description</i>
<b>Alternate Item Display</b>	<p>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>.</p> <p>See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>
<b>All Item Filter</b>	<p>Select a value to define how you want the mobile device to display items.</p> <p>Values include:</p> <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>Field or Control</b>	<b>Description</b>
<b>Count Status to Include</b>	<p>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.</p> <p>Count statuses include:</p> <ul style="list-style-type: none"> <li>• <i>New</i>: Select to return the detail lines in a non-blind, system-defined counting event for which you have not run the Counting Sheet process.</li> <li>• <i>Counting</i>: Select to return the detail lines in a blind system-defined counting event.</li> <li>• <i>Quantity Entered – Hold</i>: 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.</li> <li>• <i>Ready to Update Stock Quantity</i>: 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.</li> </ul>
<b>Count UOM Enabled</b> (count unit of measure enabled)	<p>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</p>
<b>Delivery Signature Required</b>	<p>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.</p>
<b>Display Description</b>	<p>Select to display the item descriptions on the count pages on the mobile device.</p>
<b>Display Filter Related Fields</b>	<p>Select to display the <b>Filter</b> field and <b>Filter</b> button on the Mobile Inventory Management count pages. Deselect the check box to remove the filter functionality from the pages.</p>
<b>Display Prior Entry Caption</b>	<p>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</p>
<b>Display Lookups</b>	<p>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.</p>



<b>Field or Control</b>	<b>Description</b>
<b>Display Show/Hide in tables</b>	<p>Select to display the <b>Show/Hide</b> icon in count item lists for Mobile Count pages. You can use this icon to manually expand and collapse item description sections.</p> <hr/> <p><b>Note:</b> When not selected the system only displays basic information for each row in the table.</p> <hr/>
<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 only the item ID is to be used for filtering, which also improves system performance.</p>
<b>Group</b>	<p>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.</p> <p>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.</p>
<b>Group by</b>	<p>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 <b>Group by</b> field is not enabled for counts by location and counts by item.</p> <p>Values include:</p> <ul style="list-style-type: none"> <li>• <i>Group by Item:</i> Select to sort groups by item.</li> <li>• <i>Group by Location:</i> Select to sort groups by location.</li> <li>• <i>No Grouping:</i> Select to not sort groups.</li> </ul>
<b>Initial Display Mode</b>	<p>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.</p> <p>Initial display values include:</p> <ul style="list-style-type: none"> <li>• <i>Single Item:</i> Select to initially display count pages with a single item.</li> <li>• <i>All Items:</i> Select to initially display count pages with all items in the search. You can then scroll the list using the <b>Next</b> and <b>Previous</b> buttons.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Pre-Load Serial IDs</b>	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.
<b>Rows Displayed</b>	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 <b>Next</b> link on the Mobile Inventory Management count pages. You can also change the number of rows displayed using mobile devices.
<b>Sort By</b>	<p>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.</p> <p>Sort option values include:</p> <ul style="list-style-type: none"> <li>• <i>Sort By Item:</i> Select to display count pages for an item or items, depending on the value that you selected in the <b>Initial Display Mode</b> field. This value is not available for counts by item that already have been grouped by item.</li> <li>• <i>Sort By Location:</i> 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.</li> <li>• <i>Sort By Order Entered:</i> 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.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Task Flow</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• <i>Guided Count:</i> 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.</li> <li>• <i>Count by Location:</i> 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.</li> <li>• <i>Count by Item:</i> 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.</li> <li>• <i>Manual Count:</i> 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 <b>Zero Qty Count Options</b> (zero quantity count options) field unnecessary and unavailable for entry.</li> </ul> <p>If task flows already exist for user preferences and installation options, use the <b>Show previous Row</b> and <b>Show Next Row</b> buttons to locate the type of count you want to maintain. If you are adding task flow setting, select the task flow from the <b>Task Flow</b> field list of values.</p>

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## 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 .

## Pages Used to Define Installation Options and User Preferences for Mobile Par Location Counts

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Setup Component Interfaces Page	MIN_CMPINTFC	Define the component interface for the Par Count mobile page and the Par Count Ad Hoc mobile page.
<u>Installation Options – Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	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 <i>Par Count</i> in the <b>Task Flow</b> field.
<u>User Preferences – Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	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 <b>Use Installation Values</b> check box is selected.
Define User Preferences - Overall Preferences Page	OPR_DEF_TABLE_FS1	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 Page	CART_HEADER_INV	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 Page	CART_REPLEN_OPT	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 <b>Count Required</b> check box.  The <b>Count Required</b> check box is not used in the Par Count Ad Hoc task flow.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Define Par Location - Line Details Page	CART_TEMPLATE_INV	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.
Calculate Average Usage Page	CART_USAGE_REQ_INV	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 <b>Use Average</b> button on the Par Count page.

## Installation Options – Mobile Inventory - Fluid Page

Use the Installation Options – Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) 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 - Fluid**

Select the Par Count task flow.

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

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>Field or Control</b>	<b>Description</b>
<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 <b>Next</b> link.

<b>Field or Control</b>	<b>Description</b>
<b>Initial Display Mode</b>	<p>Select to define the initial display setting for par count pages.</p> <p>Initial display values include:</p> <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 <b>Next</b> and <b>Previous</b> 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>	<p>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.</p> <p>For more information about alternate items:</p> <p>See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>
<b>Expert Mode</b>	<p>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.</p> <p>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 <b>Count</b> button. The purpose of this mode is to enable you quick data entry with minimal page updates.</p>
<b>Lookups</b>	<p>Select to display the <b>Lookup</b> icon for the <b>Business Unit</b> and <b>Location</b> fields on the Par Count and Par Count Ad Hoc mobile pages. The <b>Lookup</b> icon enables you to view a list of values and select one.</p>
<b>Description</b>	<p>Select to display the item descriptions on par count and par count ad hoc pages on a mobile device.</p>
<b>Collapse Header</b>	<p>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.</p>
<b>Display Filter Related Fields</b>	<p>Select this check box to display the <b>Filter</b> field and <b>Filter</b> button on the Par Count and Par Count Ad Hoc pages.</p> <p>Deselect this check box to remove the filter functionality from the pages.</p>
<b>Prior Entry Display</b>	<p>Select to display your last count transaction in the Prior Entry box at the bottom of the mobile count page.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Display Show/Hide in tables</b>	Select to display the <b>Show/Hide</b> icon for Par Count pages. You can use this icon to manually expand and collapse extra line information. <hr/> <b>Note:</b> When not selected the system only displays basic information for each row in the table. <hr/>
<b>Unique Compartments</b>	Select to remove the <b>Compartment</b> 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.  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.
<b>Source Option</b>	Select to display the source against a line. The source options are Stock, non-Stock, and Stockless.
<b>Last Activity</b>	Select to display the last count date and time on the Par Location Count page.

## User Preferences – Mobile Inventory - Fluid Page

Use the User Preferences – Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) 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 - Fluid**

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.

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**Note:** You do not have to add a task flow using this page as long as the flow is defined for installation options.

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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 - Fluid 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 - Fluid Page](#)

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## Performing Par Location Counts Using The PeopleSoft Fluid User Interface for Mobile Devices

This topic discusses how to perform par location counts using mobile devices.

### Pages Used to Perform Par Location Counts Using The PeopleSoft Fluid User Interface for Mobile Devices

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Par Count - Fluid Search Page</a>	MIN_CART_CT_SEH_FL	Define Par Count search criteria.
<a href="#">Par Count - Fluid Page</a>	MIN_CART_COUNT_FL	Enter Par Count page information.
<a href="#">Par Location Count - Display Options Fluid Page</a>	MIN_OPTION_SCF	Define or modify processing and display options for par location counts.

### Par Count - Fluid Search Page

Use the Par Count - Fluid Search page to define Par Count search criteria.

Navigation:

**Mobile Inventory > Par Count > and enter search criteria**

This example illustrates the fields and controls on the Par Count- Fluid Search 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.

<b>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	Enter 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.
<b>Location</b>	Scan or enter the PeopleSoft Inventory par location. This is a required field.

## Par Count - Fluid Page

Use the Par Count page to enter item counts for a par location.

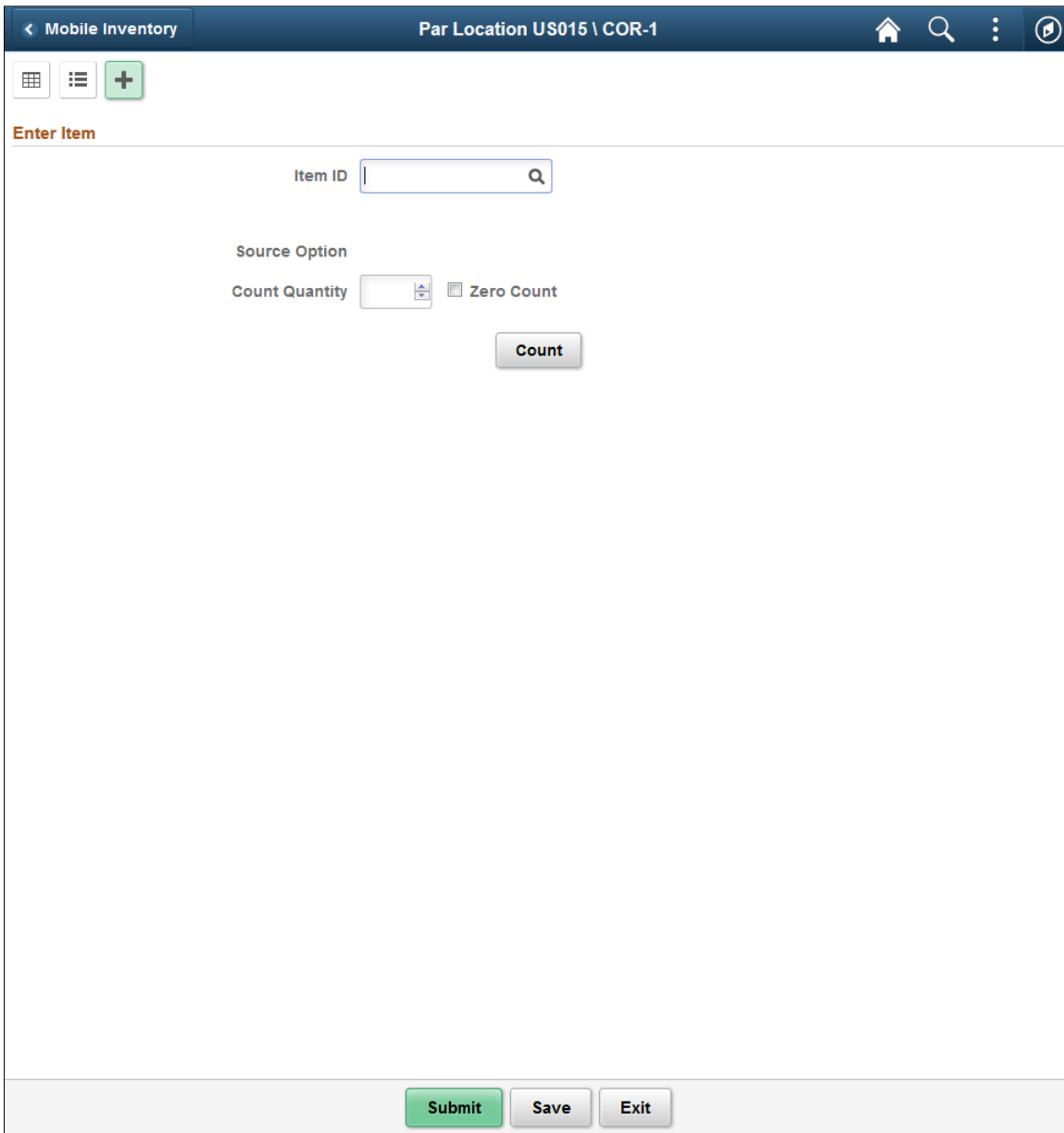
Navigation:

**Mobile Inventory > Par Count**

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

The screenshot shows a mobile application interface for 'Par Location US015 \ ICU-1'. At the top, there is a dark blue header with a back arrow, the title 'Par Location US015 \ ICU-1', a flag icon, and a menu icon. Below the header, there are three icons: a grid, a list, and a green plus sign. The main section is titled 'Enter Item' in orange. It contains an 'Item ID' text label next to a search input field with a magnifying glass icon. Below that is a 'Count Quantity' text label next to a numeric spinner control and a 'Zero Count' checkbox. A 'Count' button is positioned below the spinner. At the bottom of the screen, there is a light gray bar with three buttons: 'Submit' (green), 'Save' (gray), and 'Exit' (gray).

This example illustrates the fields and controls on the Par Count — Fluid Page as seen on a tablet.



Mobile Inventory Par Location US015 \ COR-1

Enter Item

Item ID

Source Option

Count Quantity   Zero Count

Count

Submit Save Exit

This example illustrates the fields and controls on the Par Location Count - Grid View Page.

Par Location US015 \ ICU-1

Find >>

15 rows

Item ID	Count Quantity
000000000000030022 EA Thermometer, Electronic Oral	<input type="text"/> <input type="checkbox"/> Zero Count
000000000000030024 EA Thermometer, Electronic Oral and Case Dip	<input type="text"/> <input type="checkbox"/> Zero Count
000000000000030026 HUN Thermometer, Probe Covers	<input type="text"/> <input type="checkbox"/> Zero Count
000000000000030015 HUN Sheaths Sterile	<input type="text"/> <input type="checkbox"/> Zero Count

Submit Save Exit

This example illustrates the fields and controls on the Par Location Count - Grid View Fluid Page as seen on a tablet.

Mobile Inventory Par Location US015 \ COR-1

Last Count VP1 on 04/24/2018 12:44 AM 13 rows

Item ID	Count Quantity
00000000000030022 EA Thermometer, Electronic Oral Stock	* 1 <input type="checkbox"/> Zero Count
00000000000030024 EA Thermometer, Electronic Oral and Case Dip Stock	* 1 <input type="checkbox"/> Zero Count
00000000000030026 HUN Thermometer, Probe Covers Stock	* 1 <input type="checkbox"/> Zero Count
00000000000030015 HUN Sheaths Sterile Stock	<input type="checkbox"/> Zero Count
00000000000030001 HUN Glove, Exam Small Sterile with Powder Stock	* 1 <input type="checkbox"/> Zero Count
00000000000030002 HUN Glove, Exam Medium Sterile non-Powder Stock	* 2 <input type="checkbox"/> Zero Count
00000000000030007 HUN Glove, Exam Large Sterile with Powder Stock	* 1 <input type="checkbox"/> Zero Count
00000000000030029	

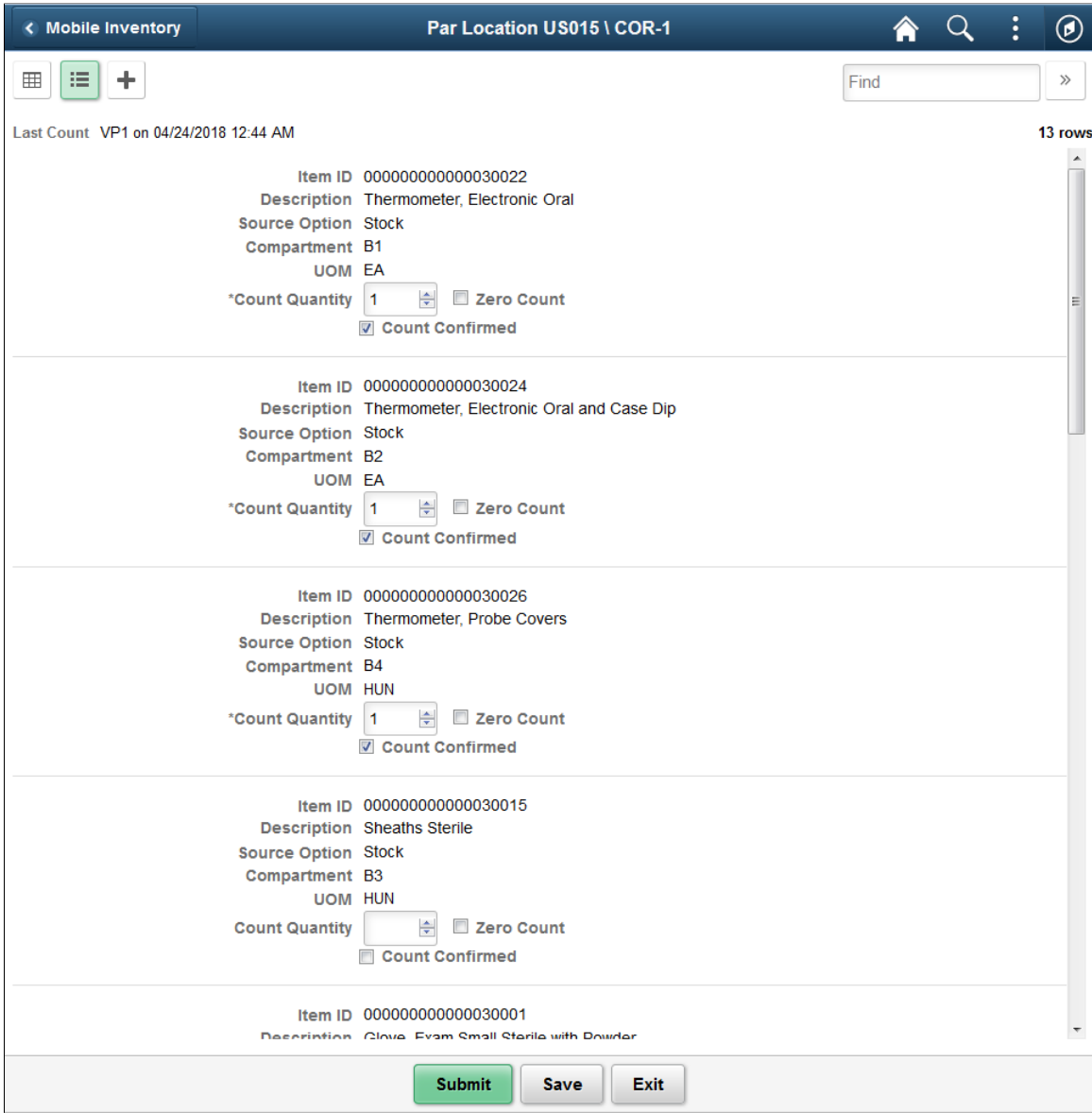
Submit Save Exit




This example illustrates the fields and controls on the Par Location Count - List View Fluid.

The screenshot displays a mobile application interface for 'Par Location US015 \ ICU-1'. At the top, there is a navigation bar with a back arrow, the title 'Par Location US015 \ ICU-1', a flag icon, and a menu icon. Below the navigation bar, there are three icons: a grid, a list view (highlighted in green), and a plus sign. To the right of these icons is a 'Find' search box with a right-pointing arrow. Below the search box, it indicates '15 rows'. The main content area shows two rows of item information, each with a 'Count Quantity' field and checkboxes for 'Zero Count' and 'Count Confirmed'. The first row has Item ID 000000000000030022, Description 'Thermometer, Electronic Oral', Compartment B1, UOM EA, and Par/Max 20/0. The second row has Item ID 000000000000030024, Description 'Thermometer, Electronic Oral and Case Dip', Compartment B2, UOM EA, and Par/Max 15/0. At the bottom of the screen, there are three buttons: 'Submit' (highlighted in green), 'Save', and 'Exit'.

Item ID	Description	Compartment	UOM	Par/Max	Count Quantity	Zero Count	Count Confirmed
000000000000030022	Thermometer, Electronic Oral	B1	EA	20/0	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
000000000000030024	Thermometer, Electronic Oral and Case Dip	B2	EA	15/0	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

This example illustrates the fields and controls on the Par Location Count - List View Fluid as seen on a tablet.



<b>Field or Control</b>	<b>Description</b>
	Displays the counting event or group ID in a grid.
	Displays the counting event or group ID in a list.
	Enter counting event or group ID as individual items.



<b>Field or Control</b>	<b>Description</b>
<b>Item ID</b>	<p>Scan or enter the PeopleSoft Inventory item ID to be counted. You can use the <b>Lookup</b> 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.</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>Count Quantity</b>	<p>Enter the item count.</p> <hr/> <p><b>Note:</b> If the Par Count Quantity exceeds 9999999, the system displays a warning message.</p> <hr/>
<b>Zero Count</b>	Select this check box if the item count is zero.
<b>Count</b>	Click to count the item entered.
<b>Prior Entry</b>	Displays item information entered.
<b>Modify</b>	Click to modify the item information entered.
<b>Submit</b>	Click to save the component.
<b>Save</b>	<p>Click to complete an interim save to the par location.</p> <hr/> <p><b>Note:</b> The system displays a receipt created message at the top of the page briefly when saved.</p> <hr/>
<b>Exit</b>	Click to return to the previous page.

## Par Location Count - Display Options Fluid Page

Use the Par Location Count - Display Options page to define or modify processing and display options for par location counts.

Navigation:

**Mobile Inventory > Par Count > Display Options**

This example illustrates the fields and controls on the Par Location Count - Display Options Fluid Page. You can find definitions for the fields and controls later on this page.

Cancel
Display Options
Done

\*Initial Display Mode All Items Grid

\*Alternate Item Display Item as Primary

Show on Page

Expert Mode  Yes  No

Lookups  Yes  No

Description  Yes  No

MFG Item ID  Yes  No

Count ID  Yes  No

Find  Yes  No

Prior Entry Display  Yes  No

Unique Compartments  Yes  No

Filter All Alternate Items  Yes  No

Display Par/Max Qty  Yes  No

Source Option  Yes  No

Last Activity  Yes  No

Reset Search Location  Yes  No

Use this page to change processing and display options for par location counts. The settings on this page are as set on the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Quantity Options</b>	Select an option to saved in the par location. The available options are : <ul style="list-style-type: none"> <li>Count</li> <li>Request</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Display Options</b>	<p>Select an option to indicate which rows appear in grid view. The available options are :</p> <ul style="list-style-type: none"> <li>• All</li> <li>• Counted</li> <li>• Not Counted</li> </ul>
<b>Initial Display Mode</b>	<p>Select a view to indicate how items display immediately after the search page. The available views are:</p> <ul style="list-style-type: none"> <li>• All Items Grid</li> <li>• All Items List</li> <li>• Single Item</li> </ul>
<b>Alternate Item Display</b>	<p>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>.</p> <p>See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>
<b>Expert Mode</b>	Select to skip validation and display of Description and UOM fields during data entry in Single Item Enter mode.
<b>Lookups</b>	Select to provide Lookup icons for fields that are available for searches.
<b>Description</b>	Select to display item descriptions in the search results. To view the description, click the expand button next to the <b>Item ID</b> field on the Guided Count page after performing the search.
<b>MFG Item ID</b>	Select to display the Manufacture Item ID on the grid view or item entry page.
<b>Count ID</b>	Displays the numerical count value if header selected.
<b>Find</b>	Select to enable the Go or Search button.
<b>Prior Entry Display</b>	Select to enable the display of the last item 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>Unique Compartments</b>	Select to display one item per compartment only in Single Item Enter mode of the current Par Location. If a single item is present in multiple compartments, they do not display

<b>Field or Control</b>	<b>Description</b>
<b>Filter All Alternate Items</b>	Select to search through all possible Alternate Items for a given item.
<b>Display Par/Max Quantity</b>	Select to display or hide an optimized or maximum quantity in Grid mode.
<b>Source Option</b>	Select to display the source against a line. The source options are Stock, non-Stock, and Stockless.
<b>Last Activity</b>	Select to display the last count date and time on the Par Location Count page.
<b>Reset Search Location</b>	Select to clear the Location field on the Par Count page. If you select the Submit or Exit buttons on the Par Location page, the Par Count page leaves the Location field blank.

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## Performing Par Location Ad Hoc Counts Using the PeopleSoft Fluid User Interface on Mobile Devices

This topic discusses how to perform par location ad hoc counts.

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**Note:** The transactions, fields, and values on the par count ad hoc count pages are similar to the ones for par count pages.

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You use the Par Count Ad Hoc Fluid 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 The PeopleSoft Fluid User Interface for 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.

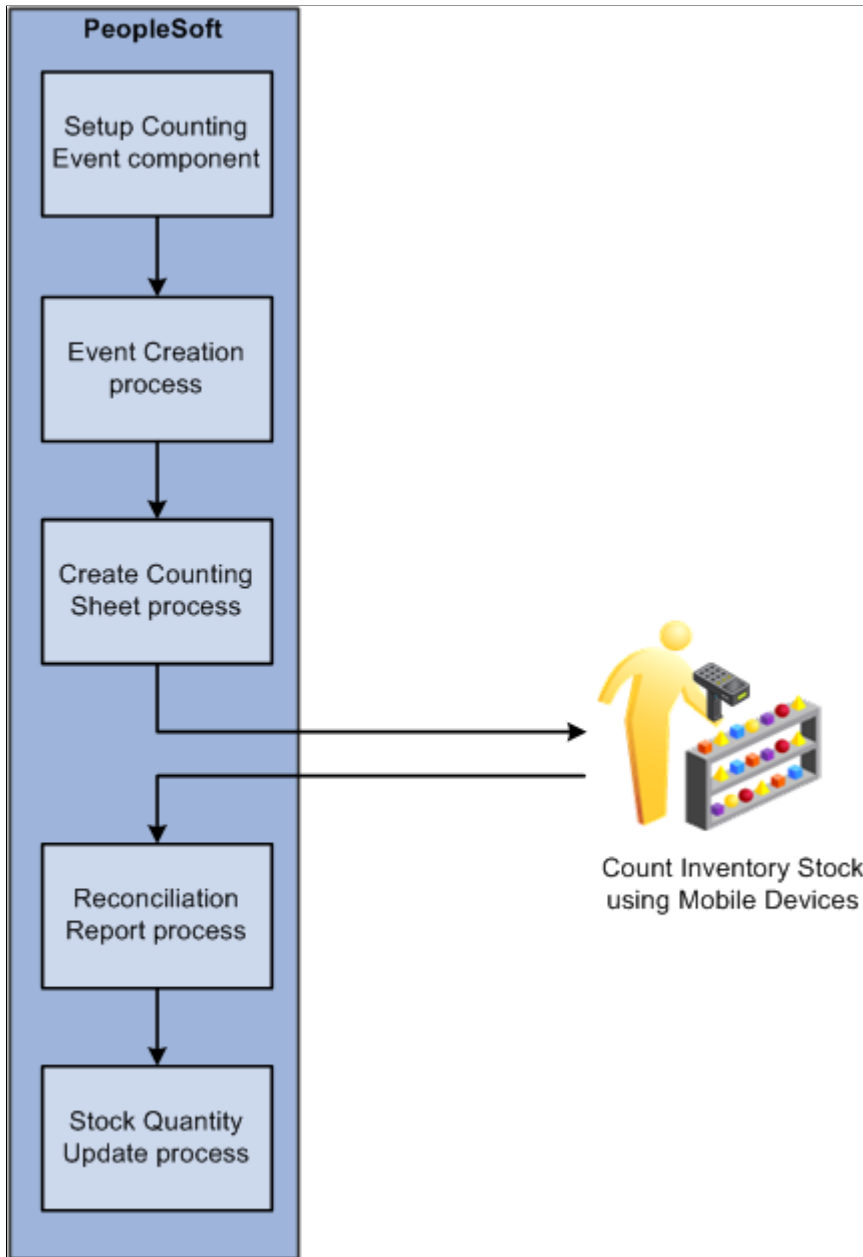
Using the PeopleSoft Inventory, you can perform two different types of counting events:

- 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.

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.
- Add items for counting based on their status. You can select the status of items from the Lookup prompt, while adding them for counting. The prompt displays the item Status field only if the *Use Status For Counting* options is enabled on the Business Unit Options page.

## 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. If required, you can specify the status of items while adding them for counting. You can select the status of items from the Lookup prompt, while adding them for counting. The prompt displays the item Status field only if the *Use Status For Counting* option is enabled on the Business Unit Options page. 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 measure. You can save the counting data at any time during the mobile transaction. If required, you can specify the status of items while adding them for counting. You can select the status of items from the Lookup prompt, while adding them for counting. The prompt displays the item Status field only if the *Use Status For Counting* option is enabled on the Business Unit Options page.

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**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.

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## 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 topic discusses how to define installation options and user preferences for Mobile Inventory Management counts.

### Pages Used to Define Installation Options and User Preferences for Mobile Inventory Management Counts`

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Setup Component Interfaces Page	MIN_CMPINTFC	Define the component interface for the inventory mobile pages.
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for Mobile Counts.
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	<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 - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) to define user preferences for Mobile Counts.

Navigation:

**Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid**

Select a task flow mode.

This example illustrates the fields and controls on the User Preferences - Mobile Inventory - Fluid: Guided Count page.

User ID VP1  
 Name Default Operator  
 Role Name

**Task Options** Find | View All First 1 of 1 Last

Task Flow   Use Installation Values

\*Initial Display Mode

\*Sort By

\*Group by

\*All Item Filter

\*Alternate Item Display

**Show on Page**

- Lookups
- Description
- MFG Item ID
- Find
- Prior Entry Display
- Pre-Load Serial IDs
- Count UOM Enabled
- Filter All Alternate Items
- Set Cursor on Find Box

**Count Status to Include**

New  Counting  Quantity Entered - Hold  Ready to Update Stock Quantity

User Preferences | Mobile Inventory - Fluid

This example illustrates the fields and controls on the User Preferences - Mobile Inventory - Fluid: Manual Count page.

User ID VP1  
 Name Default Operator  
 Role Name

**Task Options** Find | View All First 1 of 1 Last

Task Flow   Use Installation Values

\*Sort By

\*Group by

\*Alternate Item Display

**Show on Page**

- Lookups
- Description
- MFG Item ID
- Find
- Prior Entry Display
- Count UOM Enabled
- Filter All Alternate Items
- Set Cursor on Find Box

User Preferences | Mobile Inventory - Fluid

This example illustrates the fields and controls on the User Preferences - Mobile Inventory - Fluid: Count by Location page.

The screenshot displays the 'User Preferences - Mobile Inventory - Fluid' interface. At the top, there are tabs for 'User Preferences' and 'Mobile Inventory - Fluid'. Below the tabs, user details are shown: 'User ID' (VP1), 'Name' (Default Operator), and 'Role Name' (with a search icon). The main section is titled 'Task Options' and includes a search bar with 'Find | View All' and pagination '1 of 1'. The 'Task Options' section contains several dropdown menus: 'Task Flow' (set to 'Count by Location'), '\*Sort By' (set to 'Entered'), 'Group by' (set to 'Location'), and '\*Alternate Item Display' (set to 'Item Only'). There is a 'Show on Page' button and a list of checkboxes: 'Lookups' (checked), 'Description' (checked), 'MFG Item ID' (unchecked), 'Find' (checked), 'Prior Entry Display' (checked), 'Pre-Load Serial IDs' (checked), 'Count UOM Enabled' (unchecked), 'Filter All Alternate Items' (unchecked), and 'Set Cursor on Find Box' (unchecked). A 'Use Installation Values' checkbox is also present. Below this is the 'Count Status to Include' section with checkboxes for 'New' (checked), 'Counting' (checked), 'Quantity Entered - Hold' (unchecked), and 'Ready to Update Stock Quantity' (unchecked). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'. The footer shows 'User Preferences | Mobile Inventory - Fluid'.

Use the User Preferences - Mobile Inventory - Fluid 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 - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define guided count installation options.

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

Select the Guided Count task flow.

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

The screenshot shows the 'Mobile Inventory - Fluid' installation options page. It is divided into two main sections: 'System Options' and 'Task Options'.  
**System Options:**  
 - Key Concatenation Separator: \ (text input)  
 - Role Name: MIN User (text input with search icon)  
 - Delivery Signature Required:   
 - Use Barcode Symbology ID:   
 - Parse Barcode to Multi-Fields:   
**Task Options:**  
 - Task Flow: Guided Count (dropdown menu)  
 - \*Initial Display Mode: All Items Grid (dropdown menu)  
 - \*Sort By: Item (dropdown menu)  
 - \*Group by: Location (dropdown menu)  
 - \*All Item Filter: Display All (dropdown menu)  
 - \*Alternate Item Display: Item Only (dropdown menu)  
 - Show on Page section with checkboxes:  
    Lookups  
    Description  
    MFG Item ID  
    Find  
    Prior Entry Display  
    Pre-Load Serial IDs  
    Count UOM Enabled  
    Filter All Alternate Items  
    Set Cursor on Find Box  
 - Count Status to Include section with checkboxes:  
    New  
    Counting  
    Quantity Entered - Hold  
    Ready to Update Stock Quantity  
 At the bottom left, there are three buttons: Save, Notify, and Refresh. The breadcrumb 'Installation Options | Mobile Inventory - Fluid' is visible at the bottom.

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.

<b>Field or Control</b>	<b>Description</b>
Initial Display Mode	<p>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.</p> <p>Initial display values include:</p> <ul style="list-style-type: none"> <li>• <i>Single Item</i>: Select to initially display guided count pages with a single item.</li> <li>• <i>All Items</i>: Select to initially display guided count pages with all items in the search. You can then scroll the list using the <b>Next</b> and <b>Previous</b> links.</li> </ul>
Sort By	<p>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.</p> <p>Sort option values include:</p> <ul style="list-style-type: none"> <li>• <i>Item</i>: Select to display guided count pages for an item or items, depending on the value that you selected in the <b>Initial Display Mode</b> field.</li> <li>• <i>Location</i>: Select to display items on guided count pages sorted by storage location.</li> </ul>
Group by	<p>Select to group Guided Count task flow pages by the method that you use to perform the main sort.</p> <hr/> <p><b>Note:</b> This option toggles the page navigation and groups the items based on the option that is selected. When the <i>No Grouping</i> value is selected, then the group navigation is not displayed.</p> <hr/> <p>Select how you want to group items. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Item</i>: Select to sort groups by item.</li> <li>• <i>Location</i>: Select to sort groups by location.</li> <li>• <i>No Group</i>: Select to not sort groups.</li> </ul>

## Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN\_N) to define count by item installation options.

Navigation:

Select the Count by Item task flow on the Installation Options page.

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid: Count by Item page.

The screenshot shows the 'Installation Options - Mobile Inventory - Fluid' 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  
 -  Use Barcode Symbology ID  
 -  Parse Barcode to Multi-Fields  
**Task Options:**  
 - Task Flow: Count by Item (dropdown)  
 - \*Sort By: (Invalid Value) (dropdown)  
 - Group by: Item  
 - **Show on Page:**  
 -  Lookups  
 -  Description  
 -  MFG Item ID  
 -  Find  
 -  Prior Entry Display  
 -  Pre-Load Serial IDs  
 -  Count UOM Enabled  
 -  Filter All Alternate Items  
 -  Set Cursor on Find Box  
**Count Status to Include:**  
 -  New  
 -  Counting  
 -  Quantity Entered - Hold  
 -  Ready to Update Stock Quantity  
 At the bottom, there are buttons for Save, Notify, and Refresh. The breadcrumb trail at the bottom reads 'Installation Options | Mobile Inventory - Fluid'.

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

[Setting Up Installation Options and User Preferences](#)

## Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN\_N) to define count by item installation options.

Navigation:

Select the Count by Location task flow on the Installation Options page

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid: Count by Location page.

The screenshot shows the 'Installation Options - Mobile Inventory - Fluid' 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
- Use Barcode Symbology ID
- Parse Barcode to Multi-Fields

**Task Options:**

- Task Flow: Count by Location
- \*Sort By: Item
- Group by: Location
- \*Alternate Item Display: Item Only

**Show on Page:**

- Lookups
- Description
- MFG Item ID
- Find
- Prior Entry Display
- Pre-Load Serial IDs
- Count UOM Enabled
- Filter All Alternate Items
- Set Cursor on Find Box

**Count Status to Include:**

- New
- Counting
- Quantity Entered - Hold
- Ready to Update Stock Quantity

At the bottom, there are buttons for Save, Notify, and Refresh. The breadcrumb trail at the bottom left reads 'Installation Options | Mobile Inventory - Fluid'.

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.

## Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory page (INSTALLATION\_MIN\_N) to define manual count installation options.

Navigation:

Select the Manual Count task flow on the Installation Options page.

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid: Manual Count page.

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.

## Performing Guided Count Using The PeopleSoft Fluid User Interface

This topic discusses how to perform guided counts.

### Pages Used to Perform Counts by Item Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Guided Count - Search Fluid Page</u>	MIN_CT_GUID_SEH_FL	Define guided count search criteria.



<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Guided Count - Fluid Page</u>	MIN_CT_GUID_FL	Manage item counts using mobile devices.
<u>Guided Count - Display Options Fluid Page</u>	MIN_OPTION_SCF	Define or modify processing and display options for guided counts.

## Guided Count - Search Fluid Page

Use the Guided Count - Search page to define guided count search criteria.

Navigation:

**Mobile Inventory > Guided Count > and enter search criteria**

This example illustrates the fields and controls on the Guided Count - Search Fluid 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 Additional Options link. These options are predefined using user preferences and installation options in the PeopleSoft Inventory system.

<i>Field or Control</i>	<i>Description</i>
<b>Business Unit</b>	Select a PeopleSoft Inventory business unit in which counts have been defined. This field is required.

<b>Field or Control</b>	<b>Description</b>
<b>Counting Event ID</b>	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.
<b>Group ID</b>	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. You can search by Group ID alone or by Group ID and Event ID to derive appropriate search results.  <b>Note:</b> Zero is a valid value that you can enter. A value of blank does not mean zero.

### Additional Options

Using the Additional Options table, you can override default values that have been established in the Installation Options. This criteria is related to how the system processes count.

<b>Field or Control</b>	<b>Description</b>
<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.
<b>Search</b>	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.

## Guided Count - Fluid Page

Use the Guided Count page to manage item counts using mobile devices.

Navigation:

**Mobile Inventory > Guided Count**

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 screenshot shows the 'Guided Count US010\110' mobile application interface. At the top, there is a dark blue header with a back arrow, the title 'Guided Count US010\110', a flag icon, and a menu icon. Below the header, there are three icons: a grid, a list, and a green plus sign. The main content area is titled 'Enter Item' and contains several input fields and controls:

- \*Location: A text input field with a search icon.
- \*Item ID: A text input field with a search icon.
- Description: A text input field.
- Container ID: A text input field with a search icon.
- \*Storage UOM: A text input field with a search icon.
- Count UOM: A text input field.
- \*Count Quantity: A numeric input field with a spinner control.
- Count: A button next to the quantity field.
- Zero Count: A checkbox.

At the bottom of the screen, there are two buttons: 'Save' (green) and 'Exit' (grey).

This example illustrates the fields and controls on the Guided Count Grid View Page.

The screenshot displays the 'Guided Count US010\1\0' interface. At the top, there is a header bar with a flag icon and a menu icon. Below the header, there are three icons: a grid, a list, and a plus sign. A search bar labeled 'Find' with a right arrow is also present. The main content area shows a table with 90 rows. The table has two columns: 'Item ID' and 'Count Quantity'. Each row contains an item ID, a description, and a 'Count Quantity' field with a 'Zero Count' checkbox.

Item ID	Count Quantity
10000 AREA1\1 EA Long Sleeve Biking Jersey, Men's	<input type="text"/> <input type="checkbox"/> Zero Count
10002 AREA2\1\1 EA Long Sleeve T-Shirt, Mens	<input type="text"/> <input type="checkbox"/> Zero Count
10003 AREA2\1\1 EA Long Sleeve Biking Jersey, Women's	<input type="text"/> <input type="checkbox"/> Zero Count
10003 AREA2\1\1	<input type="text"/>

At the bottom of the screen, there are two buttons: 'Save' and 'Exit'.

This example illustrates the fields and controls on the Guided Count List View Page.

The screenshot shows a mobile application interface titled "Guided Count US010\1\0". At the top, there are navigation icons: a grid, a list view (highlighted in green), and a plus sign. A search bar labeled "Find" with a right arrow is also present. Below the search bar, it indicates "90 rows" and a minus sign icon. The main content area displays two item entries, each with the following fields:

- Item ID:** 10000 (for the first entry) and 10002 (for the second entry). Each ID is a clickable link.
- Location:** AREA1\11 and AREA2\11\1
- Description:** Long Sleeve Biking Jersey, Men's and Long Sleeve T-Shirt, Mens
- Storage UOM:** EA
- Count UOM:** EA
- Count Quantity:** A numeric input field with up/down arrows.
- Count Status:** A dropdown menu currently showing "New".
- Zero Count:** A checkbox next to the text "Zero Count".
- Counted:** A checkbox next to the text "Counted".

At the bottom of the screen, there are two buttons: a green "Save" button and a grey "Exit" button.

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**Note:** Click the Item ID link to access the Guided Count Single Item page.

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This example illustrates the fields and controls on the Guided Count Single Item 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 appears in Grid, List or Single Item mode as set on the Display Options page.

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**Note:** Click an Item ID while in list view to view it in Single Item mode.

---




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:

- 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 Enter Item page to include another item in the count.

<b>Field or Control</b>	<b>Description</b>
	Displays the counting event or group ID in a grid.
	Displays the counting event or group ID in a list.
	Enter counting event or group ID as individual items.
<b>Location</b>	Select a storage location for the item to add. You can either enter a location or select a value from the Lookup icon ; the system displays the Look Up Storage Location page then.
<b>Item ID</b>	Select an item to add to the count.
<b>Container ID</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>Storage UOM</b>	Displays the unit of measure in which the item is stored. For example <i>EA</i> or <i>BOX</i> . If this value changes then the count unit of measure also changes automatically to match the new value.
<b>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>Zero Count</b>	Select this check box if count quantity is zero. This is an optional field.
<b>Save</b>	Click to save the information entered for the guided count item. This records the count information into the PeopleSoft Inventory system.

## Guided Count - Display Options Fluid Page

Use the Guided Count - Display Options page to define or modify processing and display options for guided counts.

Navigation:

**Mobile Inventory > Guided Count > Display Options**



This example illustrates the fields and controls on the Guided Count - Display Options Page. You can find definitions for the fields and controls later on this page.

Cancel
Display Options
Done

**\*Initial Display Mode** All Items Grid ▼

**\*Sort By** Entered ▼

**\*Group by** No Group ▼

**\*All Item Filter** Display All ▼

**\*Alternate Item Display** Item Only ▼

Show on Page

---

- Lookups
- Description
- MFG Item ID
- Find
- Prior Entry Display
- Pre-Load Serial IDs
- Count UOM Enabled
- Filter All Alternate Items
- Set Cursor on Find Box

Use this page to change processing and display options for guided counts. The settings on this page are as set on the Installation Options - Mobile Inventory or the User Preferences - Mobile Inventory page for the task flow. Most fields can be changed for the session.

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<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.  See <a href="#">Installation Options - Mobile Inventory - Fluid Page</a> .

<b>Field or Control</b>	<b>Description</b>
<b>Group by</b>	<p>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 sort by event groups.</p> <p>See <a href="#">Installation Options - Mobile Inventory - Fluid Page</a>.</p>
All Item Filter	<p>Select a value to define how you want the mobile device to display items. Values include:</p> <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>	<p>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>.</p> <p>See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>
<b>Lookups</b>	<p>Select provide Lookup icons for fields that are available for searches.</p>
<b>Description</b>	<p>Select to display item descriptions in the search results on Grid, List, Single Item view or Item Entry pages.</p>
<b>MFG Item ID</b>	<p>Select to display the Manufacture Item ID on the grid view or item entry page.</p>
<b>Find</b>	<p>Select to enable the Go or Search button.</p>
<b>Prior Entry Display</b>	<p>Select to enable the display of the last item 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.</p>

<b>Field or Control</b>	<b>Description</b>
Pre-Load Serial IDs	<p>Select to pre-load serial IDs for a particular item and location when the Serial ID page is displayed. The default value is selected.</p> <p>If the item being counted is a serial-controlled item, then when the item is loaded, the mobile application disables the <b>Count Quantity</b> field and adds a field from which to add serials. The <b>Count Quantity</b> field is automatically set to display the number of serials that are counted and places the cursor in the <b>Serial</b> field.</p> <hr/> <p><b>Note:</b> The existing serials in the count are loaded automatically if the <b>Pre-Load Serials</b> check box is selected.</p> <hr/> <p>If the <b>Pre-Load Serials</b> 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.</p>
<b>Count UOM Enabled</b>	Select to display the unit of measure used to count event detail line items. When you select the check box, the <b>Count UOM</b> field is enabled on guided count pages.
<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 the system does not use alternate item identifiers to filter the table. This can improve system performance for the task flow.</p>
<b>Set Cursor on Find Box</b>	Select this option to allow the cursor to move to the Find field immediately post a count.

---

## Performing Counts by Location Using the PeopleSoft Fluid User Interface

This topic discusses how to perform counts by location.

## Pages Used to Perform Counts by Location Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Count by Location - Fluid Search Page</u>	MIN_CT_GUID_SEH_FL	Define count by location search criteria.
<u>Count by Location - Fluid Page</u>	MIN_CT_GUID_FL	Define count by location information .
<u>Count by Location - Display Options Fluid Page</u>	MIN_OPTION_SCF	Define page parameters.

### Count by Location - Fluid Search Page

Use the Count by Location - Fluid Search page to define count by location search criteria.

Navigation:

**Mobile Inventory > Count by Location > and enter search criteria**

This example illustrates the fields and controls on the Count by Location - Search Page. You can find definitions for the fields and controls later on this page.

Use this page to search for locations using a business unit, event, or group. To view additional search criteria, click the **Additional Options** 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 **Additional Options** 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.

## Count by Location - Fluid Page

Use the Count by Location - Fluid page to enter and count items for counts by location.

Navigation:

<Mobile Inventory> > <Count by Location> > and click Search

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

**Count by Location US010\1\0**

Find >>

**Enter Item**

\*Item ID  🔍

Description

Container ID  🔍

\*Storage UOM  🔍

Count UOM

\*Count Quantity

Zero Count

AREA1\1 (1 of 25)

This example illustrates the fields and controls on the Count by Location - Grid View Page.

Item ID	Count Quantity
10000 EA Cnt: 1000401 Long Sleeve Biking Jersey, Men's	1 <input type="checkbox"/> Zero Count
10002 EA Cnt: 1000402 Long Sleeve T-Shirt, Mens	2 <input type="checkbox"/> Zero Count
10003 EA Cnt: 1001301 Long Sleeve Biking Jersey, Women's	5 <input type="checkbox"/> Zero Count
10011 EA Cnt: 1001801 Biking Gloves, Unisex	6 <input type="checkbox"/> Zero Count
10004 EA Cnt: 1001901 Long Sleeve T-Shirt, Womens	1 <input type="checkbox"/> Zero Count

This example illustrates the fields and controls on the Count by Location - List View Page.

**Count by Location US010\1\0**

Find >>

3 rows

**Item ID** [10002](#)

**Location** AREA1\1

**Container ID** 1001301

**Description** Long Sleeve T-Shirt, Mens

**UOM** EA

**Count UOM** EA

**Count Quantity**   Zero Count

**\*Count Status**

Counted

---

**Item ID** [10008](#)

**Location** AREA1\1

**Container ID** 1001901

**Description** Switchback Mt. Biking Shorts, Women's

**UOM** EA

**Count UOM** EA

**Count Quantity**   Zero Count

**\*Count Status**

Counted

AREA1\1 (1 of 1)

**Save** **Exit**

**Note:** Click the Item ID link to access the Single Item page.



This example illustrates the fields and controls on the Count by Location - Single Item Page. You can find definitions for the fields and controls later on this page.

**Count by Location US010\1\0**

Find

**Enter Item**

Location AREA1\1

Item ID 10000

Description Long Sleeve Biking Jersey, Men's

\*Count Status Ready to Update

Container ID 1000401

UOM EA

Count UOM EA

\*Count Quantity 1 **Count**

Zero Count

**Prior Entry**

Location AREA1\1

Item ID 10004

Description Long Sleeve T-Shirt, Womens

Count Status Ready to Update

Container ID 1001901

UOM EA

Count UOM EA

Count Quantity 1 **Modify**

Item 1 of 5

**Save** **Exit**

Use this page to count the items within a location. You can filter and select locations, items, containers, and storage and count units of measure. The page functionality is similar to guided count pages except that you are not provided the items to count.

The system displays the business unit, event, and group IDs in the header. The initial page appears in Grid, List or Single Item mode as set on the Display Options page.

**Note:** Click an Item ID while in list mode to view it in Single Item mode.

After defining count information for the required fields for an item, click the **Count** button to add the item to the location count. As each item is added, the system provides the Prior Entry section, which displays the last item that was counted. After all items have been added, click the **Display All** link to view 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 **Exit** button to cancel any location counts that you added and to display the Count by Location page, where you can define another search.

---

**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 [Performing Guided Count Using The PeopleSoft Fluid User Interface](#)

<i>Field or Control</i>	<i>Description</i>
	Displays the counting event or group ID in a grid.
	Displays the counting event or group ID in a list.
	Enter counting event or group ID as individual items.

## Count by Location - Display Options Fluid Page

Use the Count by Location - Display Options Fluid page to define page parameters.

Navigation:

**Mobile Inventory > Count by Location > Menu > Display Options**

This example illustrates the fields and controls on the Count by Location - Display Options Fluid Page. You can find definitions for the fields and controls later on this page.

Cancel
Display Options
Done

\*Sort By Entered ▼

Group by Location

\*All Item Filter Display All ▼

\*Alternate Item Display Item Only ▼

Show on Page

---

- Lookups
- Description
- MFG Item ID
- Find
- Prior Entry Display
- Pre-Load Serial IDs
- Count UOM Enabled
- Filter All Alternate Items
- Set Cursor on Find Box

Use this page to change processing and display options for counts by location. The settings on this page are provided by 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>Field or Control</b>	<b>Description</b>
<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.  See <a href="#">Installation Options - Mobile Inventory - Fluid Page</a> .

<b>Field or Control</b>	<b>Description</b>
<b>All Item Filter</b>	<p>Select a value to define how you want the mobile device to display items. Values include:</p> <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 Filter</b>	<p>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>.</p> <p>See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>
<b>Lookups</b>	Select provide Lookup icons for fields that are available for searches.
<b>Description</b>	Select whether to display item descriptions in the search results for Grid, List and Single Item views or the Enter Item page.
<b>MFG Item ID</b>	Displays the manufacturer and the manufacturer's item ID on the Grid ,List view and Single Item views or the Enter Item page
<b>Find</b>	Select to enable the Go or Search button.
<b>Prior Entry Display</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>Field or Control</b>	<b>Description</b>
<b>Pre-Load Serial IDs</b>	<p>Select to pre-load serial IDs for a particular item and location when the Serial ID page is displayed. The default value is selected.</p> <p>If the item being counted is a serial-controlled item, then when the item is loaded, the mobile application disables the <b>Count Quantity</b> field and adds a field from which to add serials. The <b>Count Quantity</b> field is automatically set to display the number of serials that are counted and places the cursor in the <b>Serial</b> field.</p> <hr/> <p><b>Note:</b> The existing serials in the count are loaded automatically if the <b>Pre-Load Serials</b> check box is selected.</p> <hr/> <p>If the <b>Pre-Load Serials</b> 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.</p>
<b>Count UOM Enabled</b>	Select to display the unit of measure used to count event detail line items. When you select the check box, the <b>Counting UOM</b> field is enabled on guided count pages
<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 the system does not use alternate item identifiers to filter the table. This can improve system performance for the task flow.</p>
<b>Set Cursor on Find Box</b>	Select this option to allow the cursor to move to the Find field immediately post a count.

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## Performing Counts by Item Using the PeopleSoft Fluid User Interface

This topic discusses how to perform counts by item.

### Pages Used to Perform Counts by Item Using the PeopleSoft Fluid User Interface

Use these pages to perform counts by item.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Count by Item - Fluid Search Page</u>	MIN_CT_GUID_SEH_FL	Define count by item search criteria.
<u>Count by Item - Fluid Page</u>	MIN_CT_GUID_FL	Define count by Item information.
<u>Count by Item - Display Options Fluid Page</u>	MIN_OPTION_SCF	Define or modify processing and display options for count by item transactions.

## Count by Item - Fluid Search Page

Use the Count by Item - Fluid Search page to define count by item search criteria.

Navigation:

**Mobile Inventory > Count by Item**

This example illustrates the fields and controls on the Count by Item - Fluid Search Page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Count by Item' mobile application interface. At the top, there is a navigation bar with a back arrow, the title 'Count by Item', a flag icon, and a menu icon. Below the navigation bar, there are three search fields: '\*Business Unit' with the value 'US010', 'Counting Event ID' with the value '1', and 'Group ID' which is empty. Each field has a magnifying glass icon to its right. Below these fields is a section titled 'Additional Options' with a downward arrow. This section contains four checkboxes: 'New' (checked), 'Counting' (checked), 'Quantity Entered - Hold' (unchecked), and 'Ready to Update Stock Quantity' (unchecked). At the bottom of the screen, there is a large green button labeled 'Search'.

Use this page to search for items using a business unit, event, or group. To view additional search criteria, click the **Additional Options** link.

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 ID** field.

When you click the **Additional Options** 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.

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 Count Using The PeopleSoft Fluid User Interface](#)

## **Count by Item - Fluid Page**

Use the Count by Item - Fluid page to define count by item search criteria and add items.

Navigation:

**Mobile Inventory > Count by Item> > and click Search**

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

**Count by Item US010\110**

Find »

**Enter Item**

\*Location

Container ID

\*Storage UOM EA

Count UOM EA

\*Count Quantity  **Count**

Zero Count

10000 (1 of 81)

**Save** **Exit**



This example illustrates the fields and controls on the Count by Item - Grid View Fluid Page.

The screenshot displays the 'Count by Item US010\1\0' mobile application interface. The top header shows a back arrow, the title 'Count by Item US010\1\0', a flag icon, and a menu icon. Below the header, there are three icons: a grid view icon (highlighted in green), a list view icon, and a plus sign icon. A search bar labeled 'Find' with a right arrow is positioned to the right of these icons. Below the search bar, it indicates '3 rows'.

Location	Count	Quantity
AREA1\1 EA Cnt: 1000402 Long Sleeve T-Shirt, Mens	<input type="checkbox"/> Zero Count	2
AREA2\1\4 EA Cnt: 1001801 Long Sleeve T-Shirt, Mens	<input type="checkbox"/> Zero Count	1
AREA3\A1\R1\B1 EA Cnt: 1004601		2

At the bottom of the screen, there is a navigation bar with left and right arrows and the text '10002 (1 of 1)'. Below this bar are two buttons: a green 'Save' button and a grey 'Exit' button.

This example illustrates the fields and controls on the Count by Item - List View Fluid Page.

The screenshot displays the 'Count by Item US010\1\0' mobile application interface. The top navigation bar includes a back arrow, the title 'Count by Item US010\1\0', a flag icon, and a menu icon. Below the navigation bar, there are three icons: a grid, a list view (highlighted in green), and a plus sign. A search field labeled 'Find' with a right arrow is also present. The main content area shows '3 rows' and a list item for 'Item ID 10002'. The item details are as follows:

- Item ID: 10002
- Location: AREA1\1
- Container ID: 1000402
- Description: Long Sleeve T-Shirt, Mens
- UOM: EA
- Count UOM: EA
- Count Quantity: 2 (with a spinner control)
- \*Count Status: Ready to Update
- Counted




At the bottom of the screen, there are navigation arrows and the text '10002 (1 of 1)'. Below this, there are two buttons: 'Save' (highlighted in green) and 'Exit'.

---

**Note:** Click the Item ID to access the Single Item page.

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This example illustrates the fields and controls on the Count by Item - Single Item Page.

<i>Field or Control</i>	<i>Description</i>
	Displays the counting event or group ID in a grid.
	Displays the counting event or group ID in a list.
	Enter counting event or group ID as individual items.

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.

The difference between the count by item and the count by location is that the system provides a unique list of items that exist in the count, and then you 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.

After defining count information for the required fields for an item, click the Count button to add the item to the location count. As each item is added, the system provides a table with the last item that was counted.

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.

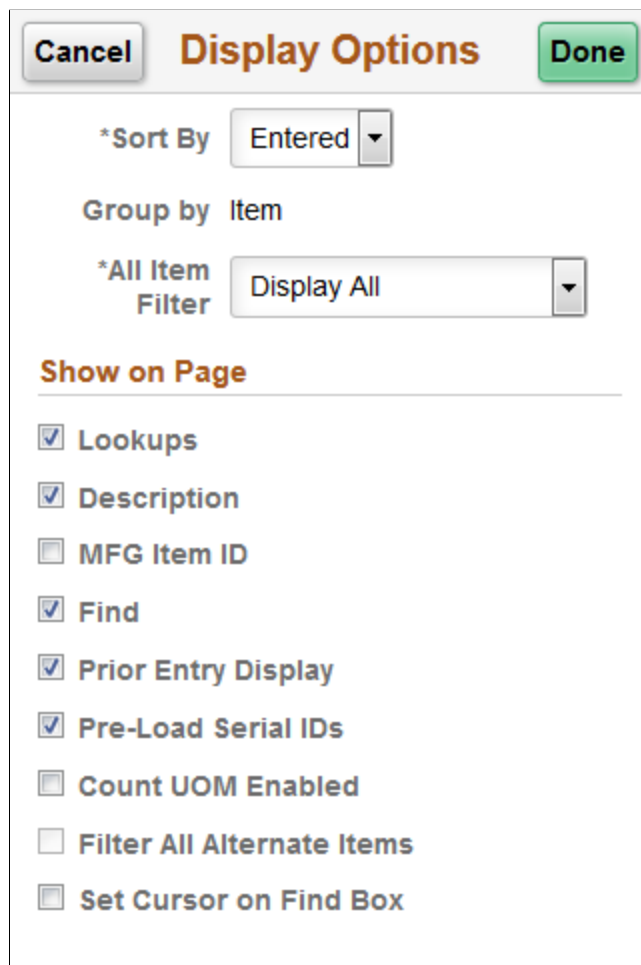
## Count by Item - Display Options Fluid Page

Use the Count by Item - Display Options page to define or modify processing and display options for Counts by Item transactions.

Navigation:

**Mobile Inventory > Count by Item > Display Options**

This example illustrates the fields and controls on the Count by Item - Display Options Fluid Page. You can find definitions for the fields and controls later on this page.



**Cancel** **Display Options** **Done**

\*Sort By Entered

Group by Item

\*All Item Filter Display All

**Show on Page**

- Lookups
- Description
- MFG Item ID
- Find
- Prior Entry Display
- Pre-Load Serial IDs
- Count UOM Enabled
- Filter All Alternate Items
- Set Cursor on Find Box

Use this page to change processing and display options for count by item transactions. The settings on this page are as set on 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>Field or Control</b>	<b>Description</b>
<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.  See <a href="#">Installation Options - Mobile Inventory - Fluid 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 sort by event groups.  See <a href="#">Installation Options - Mobile Inventory - Fluid Page</a> .
All Item Filter	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>Lookups</b>	Select provide Lookup icons for fields that are available for searches.
<b>Description</b>	Select to display item descriptions in the search results on Grid, List, Single Item view or Item Entry pages.
<b>MFG Item ID</b>	Select to display the Manufacture Item ID on the grid view or item entry page.
<b>Find</b>	Select to enable the Go or Search button.
<b>Prior Entry Display</b>	Select to enable the display of the last item 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>Field or Control</b>	<b>Description</b>
Pre-Load Serial IDs	<p>Select to pre-load serial IDs for a particular item and location when the Serial ID page is displayed. The default value is selected.</p> <p>If the item being counted is a serial-controlled item, then when the item is loaded, the mobile application disables the <b>Count Quantity</b> field and adds a field from which to add serials. The <b>Count Quantity</b> field is automatically set to display the number of serials that are counted and places the cursor in the <b>Serial</b> field.</p> <hr/> <p><b>Note:</b> The existing serials in the count are loaded automatically if the <b>Pre-Load Serials</b> check box is selected.</p> <hr/> <p>If the <b>Pre-Load Serials</b> 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.</p>
Count UOM Enabled	Select to display the unit of measure used to count event detail line items. When you select the check box, the <b>Count UOM</b> field is enabled on guided count pages.
Filter All Alternate Items	<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 the system does not use alternate item identifiers to filter the table. This can improve system performance for the task flow.</p>
Set Cursor on Find Box	Select this option to allow the cursor to move to the Find field immediately post a count.

### Related Links

[Setting Up Installation Options and User Preferences](#)

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## Performing Manual Counts Using the PeopleSoft Fluid User Interface

This topic discusses how to perform manual counts in the PeopleSoft Fluid User Interface.

## Page Used to Perform Manual Counts Using the PeopleSoft Fluid User Interface

Use these pages to perform counts by item.

<i>Page Name</i>	<i>Usage</i>
<u>Manual Count - Fluid Page</u>	Manually count items in a specific location.

### Manual Count - Fluid Page

Use the Manual Count page to manually count items in a specific location

Navigation:

**Mobile Inventory > Manual Count**

This example illustrates the fields and controls on the Manual Count Page. You can find definitions for the fields and controls later on this page.

The screenshot shows a mobile application interface for a 'Manual Count' page. At the top, there is a dark blue header with a back arrow on the left, the title 'Manual Count' in the center, and a flag icon and a menu icon on the right. Below the header, there are three icons: a grid, a list, and a green plus sign. The main content area is titled 'Enter Item' in orange text. It contains several input fields with search icons: '\*Business Unit' (with 'US010' entered), '\*Location', '\*Item ID', 'Description', 'Container ID', and '\*UOM'. Below these is a 'Count UOM' section with a '\*Count Quantity' input field and a 'Count' button. A checkbox labeled 'Zero Count' is positioned below the quantity field. At the bottom of the screen, there are two buttons: a green 'Save' button and a grey 'Exit' button.



This example illustrates the fields and controls on the Manual Count Grid Mode Page. You can find definitions for the fields and controls later on this page.

The screenshot shows a mobile application interface titled "Manual Count US010". At the top, there is a navigation bar with a back arrow, a flag icon, and a menu icon. Below the navigation bar, there are three icons: a grid, a list, and a plus sign. To the right of these icons is a search field labeled "Find" with a right-pointing arrow. Below the search field, it says "3 rows".

Item ID	Count Quantity
10002 EA Long Sleeve T-Shirt, Mens	<input type="text" value="2"/> <input type="checkbox"/> Zero Count
10000 EA Long Sleeve Biking Jersey, Men's	<input type="text" value="3"/> <input type="checkbox"/> Zero Count
10005 EA Switchback Mountain Biking Shorts, Men's	<input type="text" value="1"/> <input type="checkbox"/> Zero Count

At the bottom of the screen, there is a navigation bar with left and right arrows and the text "AREA1\1 (1 of 1)". Below this bar are two buttons: "Save" and "Exit".

This example illustrates the fields and controls on the Manual Count List Mode Page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Manual Count US010' mobile application interface. At the top, there is a navigation bar with a back arrow, the title 'Manual Count US010', a flag icon, and a menu icon. Below the navigation bar, there are three icons (grid, list, plus) and a search field labeled 'Find' with a right-pointing arrow. The main content area shows a list of three items, each with a minus icon to its right. The first item is Item ID 10002, Location AREA111, Description Long Sleeve T-Shirt, Mens, UOM EA, Count UOM EA, Count Quantity 2, and a checked 'Counted' checkbox. The second item is Item ID 10000, Location AREA111, Description Long Sleeve Biking Jersey, Men's, UOM EA, Count UOM EA, Count Quantity 3, and a checked 'Counted' checkbox. The third item is Item ID 10005, Location AREA111, Description Switchback Mountain Biking Shorts, Men's, UOM EA, Count UOM EA, Count Quantity 1, and an unchecked 'Zero Count' checkbox. At the bottom of the screen, there is a status bar showing 'AREA111 (1 of 1)' and two buttons: 'Save' and 'Exit'.

**Note:** Click the Item ID link to access the Manual Count Single Item page.

This example illustrates the fields and controls on the Manual Count - Single Item Page. You can find definitions for the fields and controls later on this page.

**Manual Count US010**

Find >>

**Enter Item**

Location AREA1\1

Item ID 10002

Description Long Sleeve T-Shirt, Mens

UOM EA

Count UOM EA

\*Count Quantity 2 **Count**

Zero Count

**Prior Entry**

Location AREA1\1

Item ID 10005

Description Switchback Mountain Biking Shorts, Men's

UOM EA

Count UOM EA

Count Quantity 1 **Modify**

Item 1 of 3

**Save** **Exit**

The Manual Count page is the basis for working with manual counts.




**Note:** Click an Item ID while in list view to view it in Single Item mode.

You can scroll through the items using the scrolling arrows.

Using the page, you can:

- Enter count quantities for individual items.

- Complete the item count.
- Change the count options.
- Navigate to the Enter Item page to include another item in the count.

<b>Field or Control</b>	<b>Description</b>
	Displays the counting event or group ID in a grid.
	Displays the counting event or group ID in a list.
	Enter counting event or group ID as individual items.
<b>Location</b>	Select a storage location for the item to add. You can either enter a location or select a value from the Lookup icon ; the system displays the Look Up Storage Location page then.
<b>Item ID</b>	Select an item to add to the count.
<b>Description</b>	Displays a description of the item below the Item ID.
<b>Container ID</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>UOM</b>	Enter the unit of measure in which the item is stored. For example <i>EA</i> or <i>BOX</i> . If this value changes then the count unit of measure also changes automatically to match the new value.
<b>Count UOM</b>	Display the unit of measure used to count event detail line items.
<b>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>Zero Count</b>	Select this check box if count quantity is zero. This is an optional field.
<b>Save</b>	Click to save the information entered for the manual count item. This records the count information into the PeopleSoft Inventory system.

## **Related Links**

[Setting Up Installation Options and User Preferences](#)

[Performing Guided Count Using The PeopleSoft Fluid User Interface](#)



# 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 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.

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## Setting Up the PeopleSoft System for Mobile Express Issue

This topic discusses how to setup the PeopleSoft system for mobile express issues. When you use Mobile Inventory to perform it, you use information that has been established in the PeopleSoft Inventory system.

### Pages Used to Set Up the PeopleSoft System for Mobile Express Issue

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Define express issue installation options.
<u>Express Issue Details Page</u>	OPR_DEF_TABLE_MIN	Set up express issue user preferences.
Define User Preferences - Overall Preferences Count by Location - Selection Criteria Page	OPR_DEF_TABLE_FS1	Use the <b>Business Unit</b> field to define the default Inventory business unit used on the Express Issue page.
Setup Component Interfaces Page	MIN_CMPINTFC	Define the component interface for the Express Issue mobile page.

### Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define express issue installation options.

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

Select the Express Issue task flow



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

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.

<b>Field or Control</b>	<b>Description</b>
<b>Task Flow</b>	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.
<b>Rows Displayed</b>	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.
<b>Lookups</b>	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.
<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> .  For more information about alternate items:  See <a href="#">Setting Up Alternative Item Identifiers</a> .

<b>Field or Control</b>	<b>Description</b>
<b>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 <b>Filter</b> field and <b>Filter</b> button on the Express Issue page. Deselect this check box to remove the filter functionality from the pages.
<b>Prior Entry Display</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 <b>Show /Hide</b> icon on Express Issue pages. You can use this icon to manually expand and collapse extra line information.  <b>Note:</b> When not selected the system only displays basic information for each row in the table.
<b>Default Stocking UOM</b> (default stocking unit of measure)	Select to display the unit of measure used to as the stocking unit of measure. When you select the check box, the <b>Default Stocking UOM</b> field appears on the Express Issue page. You can use the <b>Options</b> link on that page to change the setting.
<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 the system should not use alternate item identifiers to filter the table. This can improve system performance for the task flow.

## 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 > Define User Preferences > Mobile Inventory - Fluid**

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 - Fluid 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 - Fluid Page](#).

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## Processing Internal Express Issues Using the PeopleSoft Fluid User Interface on a Mobile Device

This topic discusses how to process internal express issues using the PeopleSoft Fluid User Interface.

### Pages Used to Process Internal Express Issues Using the PeopleSoft Fluid User Interface on a Mobile Device

Use these pages to process express issues.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Express Issue - Fluid Page</a>	MIN_EXP_ISS_SRH_FL	Enter Fluid Express Issue header details.
<a href="#">Express Issue with line information - Fluid Page</a>	MIN_EXP_ISS_ORD_FL	Define Fluid line information for express issues.
<a href="#">Comments &amp; Attachments - Fluid Page</a>	MIN_HD_CMNTATT_SCF MIN_LN_CMNTATT_SCF	Upload the header and line level attachments.
<a href="#">Express Issue Chartfield Overrides - Fluid Page</a>	MIN_CF_GRID_TM_SCF	Enter appropriate chartfield override values.
<a href="#">Express Issue - Display Options Fluid Page</a>	MIN_OPTION_SCF	Define or modify processing and display options for Express Issue transactions.

---

**Note:** Lot and serial capability is available for express issue transactions.

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### Express Issue - Fluid Page

Use the Express Issue - Fluid page to enter Fluid Express Issue header details.

Navigation:

**Mobile Inventory** > **Express Issue**

This example illustrates the fields and controls on the Express Issue - Fluid Page. You can find definitions for the fields and controls later on this page.

**Express Issue** ⋮

**\*Business Unit**  🔍

**\*Order No**  🔍

**\*Location Code**  🔍

∨ **Additional Options**

---

**Distrib. Type**  🔍

**Override GL**  🔍

**Ship To**

**Sold To**

**Use Default Location**

---


[ChartField Overrides](#)

[Comments & Attachments](#)

**Add**

When you access the Express Issue page, the system provides default values from the PeopleSoft Inventory system installation or user preferences set up pages.

Use the Express Issue page to initiate an internal express issue. After you add an item to the issue, the Prior Entry table appears on the page for informational purposes.

<b>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	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 <b>Business Unit</b> field becomes a display only field.
 <b>Lookup icon</b>	Click the <b>Lookup</b> icon to access the Look Up Business Unit page where you can search for a business unit.

<b>Field or Control</b>	<b>Description</b>
<b>Order No.</b>	Enter an order number. If you're using auto numbering, 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.
<b>Location Code</b>	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>Additional Options</b> (link)	Click to access more options to define for use with Express Issue pages.
<b>Distrib. Type</b> (distribution type)	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>Override GL</b>	<p>If this is an interunit expensed issue, you can enter a new General Ledger business unit against which the transaction is costed.</p> <p>The system validates the destination business unit's ChartFields against the new value and costs the issue using the defined interunit transfer price.</p>
<b>Ship To</b> (ship to customer)	Enter a ship-to customer.
<b>Sold To</b> (sold to customer)	Enter a sold-to customer. The field is used with the <b>Ship To Cust</b> field to define the correct shipping information.
<b>Use Default Location</b>	Select this check box to enable the system to select a <b>Storage Location</b> field value when you do not enter a value. The system attempts to pick from the item's default putaway location.

## Express Issue with line information - Fluid Page

Use the Express Issue Fluid page with line information to define fluid line information for express issues.

Navigation:

**Mobile Inventory > Express Issue > and Click Add**

This example illustrates the fields and controls on the Express Issue with line information Fluid Page. You can find definitions for the fields and controls later on this page.

**Express Issue US010 \ NEXT** ⋮

+ 📊 ☰ ✎

**Enter Item**

Distrib Type  🔍

\*Item ID  🔍

\*Storage Location  🔍

\*UOM  🔍 [Comments & Attachments](#)

\*Quantity  [ChartField Overrides](#)

Use the Line Information table to enter express issue order and item information.

---

**Note:** This page appears in Grid and List mode as set under display options.

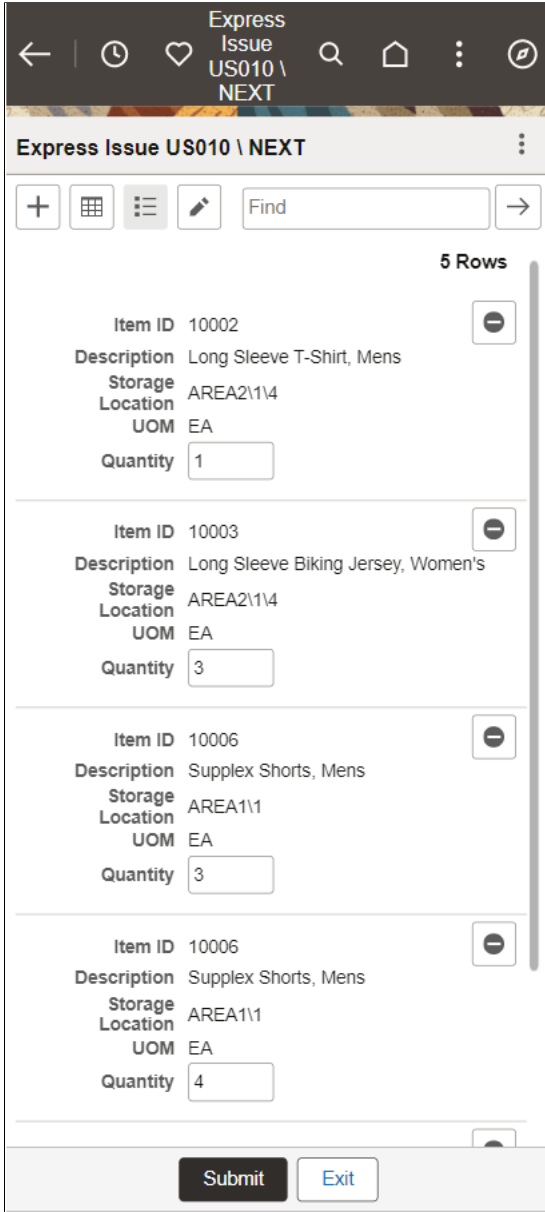
---




This example illustrates the fields and controls on the Express Issue - Grid View Page.

The screenshot shows a mobile application interface for 'Express Issue US010 \ NEXT'. The top navigation bar includes a back arrow, a clock icon, a heart icon, a search icon, a home icon, a menu icon, and a refresh icon. Below the navigation bar, the title 'Express Issue US010 \ NEXT' is displayed. A toolbar contains a plus icon, a grid icon, a list icon, an edit icon, a search box labeled 'Find', and a right arrow icon. Below the toolbar, the text '5 Rows' is shown. The main content area is a table with two columns: 'Item ID' and 'Quantity'. The table contains five rows of data, each with a unique Item ID, a description, and a quantity value in a text input field. At the bottom of the screen, there are two buttons: 'Submit' and 'Exit'.



Item ID	Quantity
10002 Long Sleeve T-Shirt, Mens EA AREA2\1\4	1
10003 Long Sleeve Biking Jersey, Women's EA AREA2\1\4	3
10006 Supplex Shorts, Mens EA AREA1\1	3
10006 Supplex Shorts, Mens EA AREA1\1	4
10007 Sidepocket Shorts, Womens OTHER EA AREA2\3\3	5

This example illustrates the fields and controls on the Express Issue - List View page.



<b>Field or Control</b>	<b>Description</b>
	Select to enter items.
	Displays information in a grid.
	Displays information in a list.



<b>Field or Control</b>	<b>Description</b>
	Select to edit header information.
<b>Distrib Type</b> (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.
<b>Item ID</b>	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 <b>Display Description</b> check box on the Options page for the task flow, 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 <a href="#">Setting Up Alternative Item Identifiers</a> .  <hr/> <b>Note:</b> The Item ID field and associated filters support GSI barcode parsing on the Enter Item page such that the system automatically populates the Item ID when a barcode is scanned.
<b>Find</b>	Enter to search for item information in List or Grid view.  <hr/> <b>Note:</b> The Find field and associated filters support GSI barcode parsing such that the system automatically populates the Item ID when a barcode is scanned.
 <b>Lookup</b>	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.

<b>Field or Control</b>	<b>Description</b>
<b>Serial ID</b>	<p>Select or enter a serial ID for which you want to create an internal express issue.</p> <hr/> <p><b>Note:</b> This field is available only for serial, or serial and lot controlled items.</p> <hr/> <p>Once you enter an item, the serial ID displays on page and the lot ID appears by default automatically if applicable.</p> <hr/> <p><b>Note:</b> The Serial ID field and associated filters support GSI barcode parsing on the Enter Item page such that the system automatically populates the Serial ID when a barcode is scanned.</p>
<b>Lot ID</b>	<p>Select or enter a lot ID for which you want to create an internal express issue.</p> <hr/> <p><b>Note:</b> This field is available only for lot, or serial and lot controlled items.</p> <hr/> <p>When you enter an item, the lot ID or the serial ID option is displayed.</p> <hr/> <p><b>Note:</b> The Lot ID field and associated filters support GSI barcode parsing on the Enter Item page such that the system automatically populates the Lot ID when a barcode is scanned.</p>
<b>Expiration Date</b>	Displays expiration date of the lot ID.
<b>Storage Location</b> (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.
<b>UOM</b> (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.
<b>Quantity</b>	Enter the amount that you want to issue.
<b>Comments &amp; Attachments</b>	Click this link to enter Express Issue line comments and upload attachments. For more details, see <a href="#">Comments &amp; Attachments - Fluid Page</a> .

<b>Field or Control</b>	<b>Description</b>
<b>ChartField Overrides</b>	<p>Click this link to override the ChartField values.</p> <p>Select an Accounting Tag. All the chartfields values will be populated from the accounting tag.</p> <p>For Inventory and Mobile Inventory Express Issue, delivered Accounting Tag is <b>DEMO_EXPRESS_ISSUE</b>.</p> <p>To select the Accounting Tag on the Express Issue page, enable <i>Inventory</i> and <i>Mobile Inventory</i> check boxes on the <b>Accounting Tag Products</b> page for <b>DEMO_EXPRESS_ISSUE</b> Accounting Tag. By default, these check boxes are enabled.</p> <p>To know more about configuring Accounting Tags and Accounting Tag Products, see “Accounting Tags - ChartFields Page” (Application Fundamentals) and “Accounting Tag Products Page” (Application Fundamentals).</p> <hr/> <p><b>Note:</b> After overriding the chartfields, run the Cost Accounting Creation process. Once the process is complete, whatever overridden at the mobile inventory line level those will get copied to the <b>Unposted to GL</b> and the remaining entries which were not there in the accounting tag level, these will get from the transaction accounting rules.</p> <hr/>
<b>Add Item</b>	<p>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 Quantity field.</p> <p>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.</p> <p>See <i>PeopleSoft Mobile Inventory Management, Using Mobile Express Issue, Processing Internal Express Issues on a Mobile Device, Adding Lines to Express Issues</i></p>
<b>Submit</b>	Click to submit entered order details.
<b>Exit</b>	Click to exit and return to the previous page.

See [Display Options - Mobile Inventory - Fluid Page](#)

## Comments & Attachments - Fluid Page

Use the Express Issue Comments and Attachments - Fluid Page to enter header and line level comments and upload the attachments.

Navigation:

**Mobile Inventory > Express Issue > click the Comments & Attachments link**

This example illustrates the fields and controls on the Express Issue - Header Comments & Attachments Page. You can find definitions for the fields and controls later on this page.

[Cancel](#) **Comments & Attachments** [Done](#) ×

Business Unit US010  
Order No NEXT

**Comments**

Header Comment

**Attachments**

View ↑↓	Description ↑↓	User ID ↑↓	Date
<a href="#">Header_Attachment.txt</a>	Attachment Description	VP1	08/

[Add Attachment](#)

This example illustrates the fields and controls on the Express Issue - Line Comments & Attachments Page. You can find definitions for the fields and controls later on this page.

Cancel
**Comments & Attachments**
Done ×

**Business Unit** US010

**Order No** NEXT

**Order Line** 1

**Schedule Line Number** 1

**Comments**


Line Comment

**Attachments**

View <span style="font-size: 0.8em;">↑↓</span>	Description <span style="font-size: 0.8em;">↑↓</span>	User ID <span style="font-size: 0.8em;">↑↓</span>	Date/Time <span style="font-size: 0.8em;">↑↓</span>
Line_Attachment.txt	Attachment Description	VP1	08/10/2024 10:30 AM

[Add Attachment](#)

<b>Field or Control</b>	<b>Description</b>
<b>Comments</b>	Enter the comments for Express Issue Header and Line.
<b>Attachments</b>	<p>Displays the list of added attachments along with upload date and time, user id, and name of the up-loader.</p> <p>Click the attachment file name link to view or download the attachments. You can also enter description for the added attachments.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Add Attachment</b>	Click <b>Add Attachment</b> button to select and upload the attachments. You can upload multiple files at a time depending on configured attachment upload limit.  To configure attachment upload limit, see “Installation Options - Multiple Attachments Page” (Application Fundamentals).
 (Delete)	Click Delete to remove that attachment from the list.

**Note:** You can add, view, and delete the attachments in Mobile Inventory Express Issue only before Save.

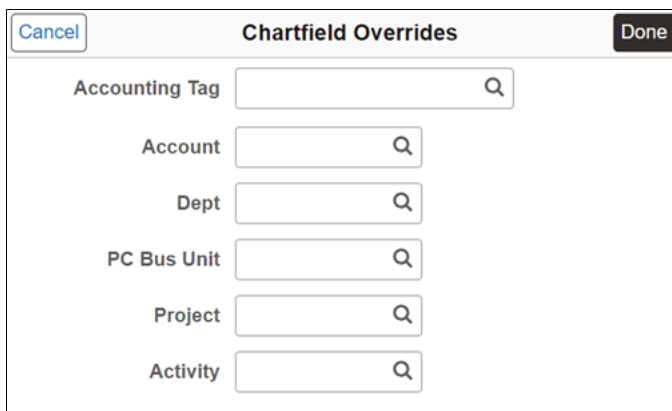
## Express Issue Chartfield Overrides - Fluid Page

Use the Express Issue Chartfield Overrides - Fluid page to enter appropriate chartfield values.

Navigation:

**Mobile Inventory** > **Express Issue** > **click the ChartField Overrides link**

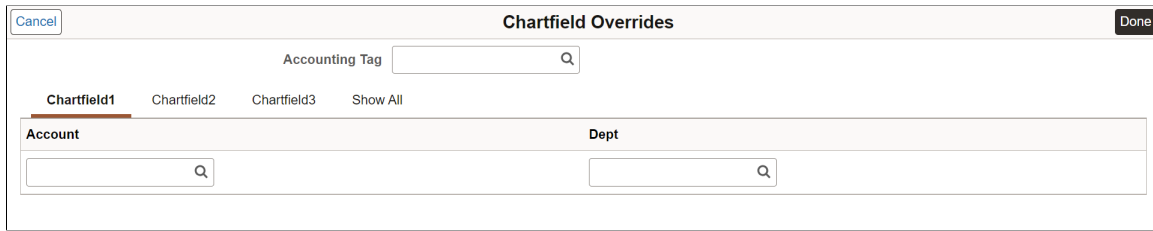
This example illustrates the fields and controls on the Express Issue - Chartfield Overrides Page (Mobile View). You can find definitions for the fields and controls later on this page.



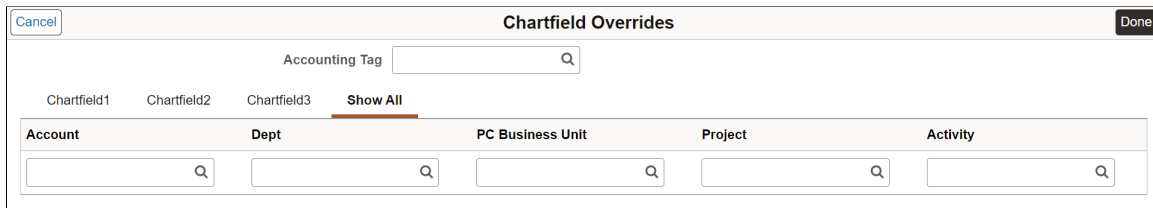
Once you enter values and click the **Done** button. The Override GL business unit then, also becomes the associated driving value.

All the chartfields displayed on the *Express Issue - Chartfield Overrides Page (Mobile View)* are also available on the desktop view under different tabs. **Account** and **Dept** fields are displayed under *Chartfield1* tab, **PC Business Unit** is under *Chartfield2*, and **Project** and **Activity** fields are displayed under *Chartfield3* tab. Click *Show All* tab to view all five default chartfields on the same tab.

This example illustrates the fields and controls on the Express Issue - Chartfield Overrides Chartfield1 tab (Desktop View).



This example illustrates the fields and controls on the Express Issue - Chartfield Overrides Show All tab (Desktop View).




Chartfield tab sequence number always starts from 1 (Chartfield1) and continues. If all the fields under any chartfield tab are hidden as per the CF Display template and to maintain the Chartfield sequence number, fields from other set of chartfields will be moved to the preceding tab.

The Chartfields displayed in the above screenshots are based on the CF Display template: **MIN\_EXPR\_ISSUE**. To know more about chartfield display options and assign CF Display Templates, see “ChartField Display Template Page” (Application Fundamentals) and “Assign CF Display Templates Page” (Application Fundamentals).

**Note:** ChartField values entered at the header level are applicable across all the lines in the express issue.

<b>Field or Control</b>	<b>Description</b>
<b>Accounting Tag</b>	<p>Select an Accounting Tag. All the chartfields values will be populated from the accounting tag.</p> <p>For Inventory and Mobile Inventory Express Issue, delivered Accounting Tag is <b>DEMO_EXPRESS_ISSUE</b>.</p> <p>To select the Accounting Tag on the Express Issue page, enable <i>Inventory</i> and <i>Mobile Inventory</i> check boxes on the <b>Accounting Tag Products</b> page for <b>DEMO_EXPRESS_ISSUE</b> Accounting Tag. By default, these check boxes are enabled.</p> <p>To know more about configuring Accounting Tags and Accounting Tag Products, see “Accounting Tags - ChartFields Page” (Application Fundamentals) and “Accounting Tag Products Page” (Application Fundamentals).</p>
<b>Account</b>	<p>Select or enter an account number as a chartfield value to override.</p>

<b>Field or Control</b>	<b>Description</b>
 <b>(Lookup icon)</b>	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.
<b>Department</b>	Select or enter a department as a chartfield value to override.
<b>PC Business Unit</b>	Select or enter a PC business unit as a chartfield value to override.
<b>Project</b>	Select or enter a project as a chartfield value to override.
<b>Activity</b>	Select or enter an activity as a chartfield value to override.

## Express Issue - Display Options Fluid Page

Use the Express Issue - Display Options page to define or modify processing and display options for Express Issue transactions.

Navigation:

**Mobile Inventory > Express Issue > Display Options**



This example illustrates the fields and controls on the Express Issue - Display Options Fluid Page. You can find definitions for the fields and controls later on this page.

Use this page to change processing and display options for count by item transactions. The settings on this page are as set on 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>Field or Control</b>	<b>Description</b>
<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> .  See <a href="#">Setting Up Alternative Item Identifiers</a> .
<b>Lookups</b>	Select provide Lookup icons for fields that are available for searches.
<b>Description</b>	Select to display item descriptions in the search results on Grid, List, Single Item view or Item Entry pages.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Find</b>	Select to enable the Go or Search button.
<b>Prior Entry Display</b>	Select to enable the display of the last item 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>Default Stocking UOM</b>	Select to populate the unit of measure (UOM) for an item as defined on the Unit of Measure page for the stocking UOM.
<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 the system does not use alternate item identifiers to filter the table. This can improve system performance for the task flow.</p>

# Using Mobile Inventory Adjustments

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## Setting Up Options for the Adjustment Task Flow

This topic discusses how to setup options for the adjustment task flow.

### Pages Used to Set up Options for the Adjustment Task Flow

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Define installation options for the adjustment task flow.
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for the adjustment task flow.

### Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define installation options for the adjustment task flow.

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory- Fluid**

Select Adjustment in the Task Flow field.

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

Use this page to set up default options for adjustments at the installation level for mobile devices.

<b>Field or Control</b>	<b>Description</b>
<b>Alternate Item Display</b>	<p>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>.</p> <p>For more information about alternate items: See <a href="#">Setting Up Alternative Item Identifiers</a>.</p>
<b>Lookups</b>	<p>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.</p>
<b>Entry UOM Enabled</b> (entry unit of measure enabled)	<p>Select this check box to indicate that the <b>Entry UOM</b> field is to be displayed on the Mobile Inventory - Adjustments page.</p>
<b>Default Stocking UOM</b>	<p>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.</p>

<b>Field or Control</b>	<b>Description</b>
<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 only the item ID is to be used for filtering, which also improves system performance.</p>

## User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page to define user preferences for the adjustment task flow.

Navigation:

**Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid.**

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 - Fluid 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 - Fluid Page](#).

---

## Performing Mobile Inventory Adjustments Using the PeopleSoft Fluid User Interface

This topic discusses how to perform Mobile Inventory adjustments.

### Pages Used to Perform Mobile Inventory Adjustments Using the PeopleSoft Fluid User Interface

<b>Page Name</b>	<b>Usage</b>
<a href="#">Adjustments - Fluid Search Page</a>	Define adjustments search criteria.
<a href="#">Adjustments - Fluid Page</a>	Perform Inventory adjustments.

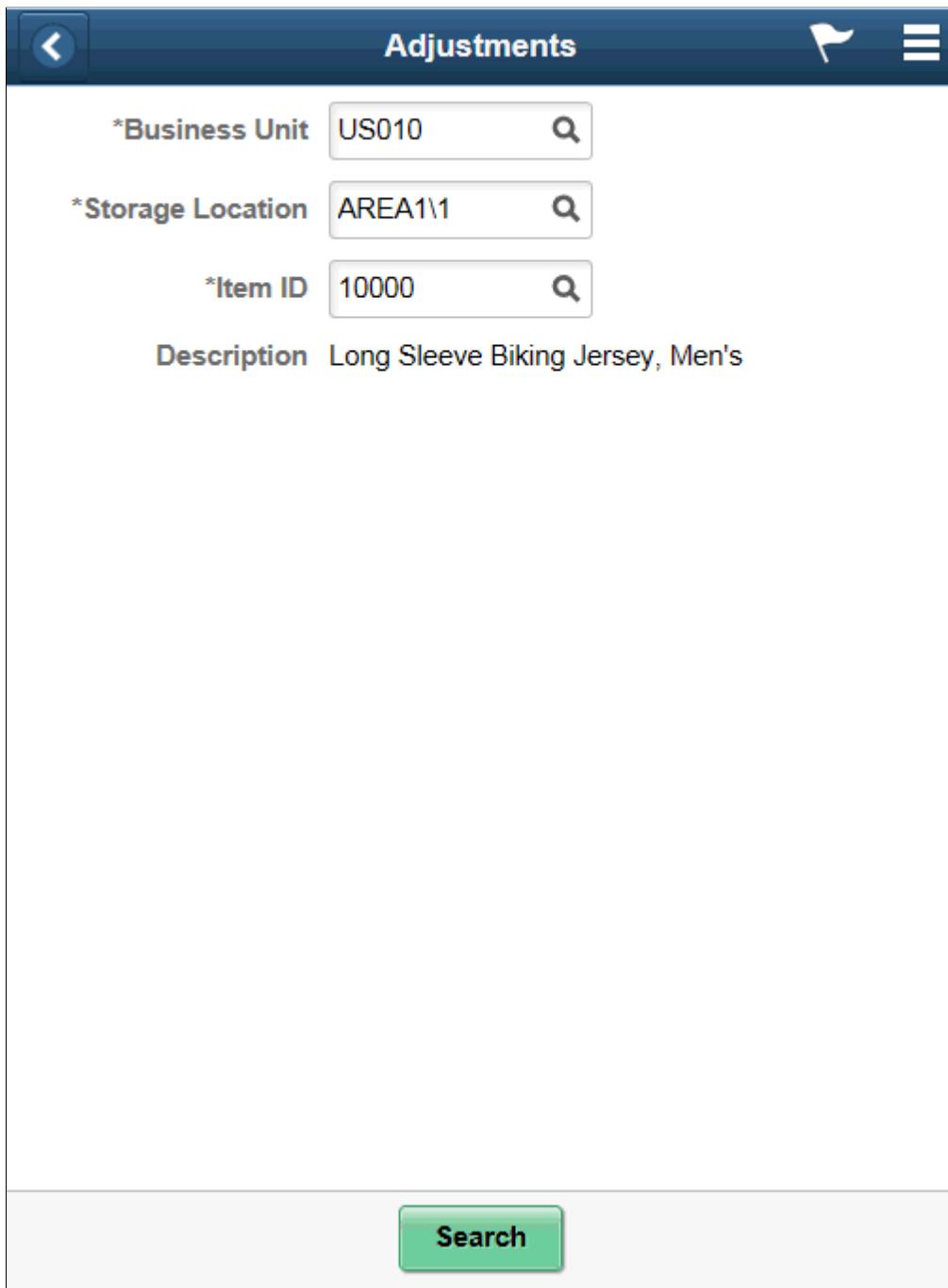
## Adjustments - Fluid Search Page

Use the Adjustments - Fluid Search page to define adjustments search criteria.

Navigation:

**Mobile Inventory > Adjustments > and enter search criteria**

This example illustrates the fields and controls on the Adjustments - Fluid Search Page. You can find definitions for the fields and controls later on this page.



The screenshot displays the 'Adjustments' mobile application interface. At the top, there is a dark blue header with a back arrow on the left, the title 'Adjustments' in the center, and a flag icon and a menu icon on the right. Below the header, there are three search criteria fields, each with a magnifying glass icon on the right:

- \*Business Unit: US010
- \*Storage Location: AREA1\1
- \*Item ID: 10000

Below these fields, the text 'Description Long Sleeve Biking Jersey, Men's' is displayed. At the bottom of the screen, there is a green 'Search' button.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Business Unit</b>	Enter the business unit to which the item belongs. The system automatically displays the default business unit from the operator ID, but it can be changed.
<b>Storage Location</b> (storage location)	Enter or search for a valid storage location for the item.
<b>Item ID</b>	Scan or enter the PeopleSoft inventory item ID for the stock you want to adjust for the business unit.
<b>Description</b>	Displays the item description below the Item ID.

## Adjustments - Fluid Page

Use the Adjustments - Fluid page to perform inventory adjustments.

Navigation:

**Mobile Inventory > Adjustments**

This example illustrates the fields and controls on the Adjustments - Fluid Page. You can find definitions for the fields and controls later on this page.

The screenshot shows a mobile application interface for 'Adjustments US010 \ 10000'. The interface includes the following fields and controls:

- \*Adjustment Type**: A dropdown menu with 'Scrap' selected.
- Storage Location**: Text field containing 'AREA1\1'.
- Item ID**: Text field containing '10000'.
- Description**: Text field containing 'Long Sleeve Biking Jersey, Men's'.
- Container ID**: Text field with a search icon.
- \*Stor UOM**: Text field with 'EA' and a search icon.
- Quantity Available**: Text field containing '7027'.
- Entry UOM**: Text field with 'EA' and a search icon.
- \*Adjust Quantity**: A numeric spinner field with 'EA' to its right.
- Distrib. Type**: Text field with a search icon.
- Reason Code**: Text field with a search icon.
- Comments**: A large text area for entering notes.

Below the fields is a link labeled 'ChartField Overrides'. At the bottom of the screen are two buttons: 'Submit' (green) and 'Exit' (grey).

---

**Note:** If you select the Allow ChartField Overrides check box for the Adjustment Task Flow on the Installation Options-Mobile Inventory Fluid page the ChartField Overrides link becomes available on the Adjustment-Fluid page.

---



This example illustrates the fields and controls on the Adjustments - ChartField Overrides Fluid Page.

Cancel**Chartfield Overrides**Done

Account	<input type="text"/>	Q
Alt Acct	<input type="text"/>	Q
Oper Unit	<input type="text"/>	Q
Fund	<input type="text"/>	Q
Dept	<input type="text"/>	Q
Program	<input type="text"/>	Q
Class	<input type="text"/>	Q
Bud Ref	<input type="text"/>	Q
Product	<input type="text"/>	Q
PC Bus Unit	<input type="text"/>	Q
Project	<input type="text"/>	Q
Activity	<input type="text"/>	Q
Source Type	<input type="text"/>	Q
Category	<input type="text"/>	Q
Subcategory	<input type="text"/>	Q
Affiliate	<input type="text"/>	Q
Fund Affil	<input type="text"/>	Q
Oper Unit Affil	<input type="text"/>	Q

---

**Note:** You can override ChartField values on the ChartField Overrides page and pass them on to the Accounting Line.

---

<b>Field or Control</b>	<b>Description</b>
<b>Adjustment Type</b>	<p>Enter or select an adjustment type. Valid values include:</p> <ul style="list-style-type: none"> <li>• <i>Decrease</i> (decrease inventory stock quantity)</li> <li>• <i>Increase</i> (increase inventory stock quantity)</li> </ul> <hr/> <p><b>Note:</b> When you increase inventory stock using this adjustment type, the new quantity is costed using the <b>Default Actual Cost</b> field on the Define Business Unit Item - General: Common page.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>Misc Issue</i> (miscellaneous issue)</li> <li>• <i>Misc Return</i> (miscellaneous return)</li> <li>• <i>Scrap</i> (destroy inventory stock quantity)</li> </ul>
<b>Storage Location</b>	Enter or search for a valid storage location for the item.
<b>Item ID</b>	Displays the PeopleSoft Inventory item ID and item description. The Item Information table displays item stock information at the PeopleSoft Inventory business unit level.
<b>Description</b>	Displays a description of the item below the Item ID.
<b>Container ID</b>	Display the PeopleSoft Inventory container ID.
<b>Lot ID</b>	<p>Select or enter a lot ID.</p> <hr/> <p><b>Note:</b> This field is available only for lot, or serial and lot controlled items.</p> <hr/> <p>When you enter an item, the lot ID or the serial ID option is displayed.</p>
<b>Expiration Date</b>	Displays expiration date of the Lot ID. This field is displayed when you enter the Lot ID which exists in the system.
<b>Stor UOM</b>	<p>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.</p> <p>The system displays the default stocking UOM if the <b>Default Stocking UOM</b> check box is selected on the Installation Options - Mobile Inventory page (or the User Preferences - Mobile Inventory page) for the adjustments task flow.</p> <p>The unit of measure that appears to the right of the <b>Qty</b> (quantity) field holds this value unless you enter a value in the <b>Entry UOM</b> field.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Quantity Available</b>	View the available quantity within the storage location selected. This field is display only.
<b>Entry UOM</b>	Displays the value of the entry unit of measure. You can modify this value.
<b>Adjust Quantity</b>	Enter the quantity you want to adjust.
<b>Distrib Type</b>	<p>Enter or search for a valid distribution type. The selected distribution type is validated when you save.</p> <p>If you leave this field blank, the system uses the default distribution type that is defined for the business unit when the Mobile Adjustment page is saved.</p>
<b>Reason Code</b>	Enter or select a valid reason code. This field defines the need for the adjustment. Reason codes are defined on the Reason Code page.
<b>Comments</b>	Enter a comment using up to 254 characters for the adjustment transaction. Comments are written to the TRANSACTION_INV table.
<b>Submit</b>	Click to confirm values and save.
<b>Exit</b>	Click to discard changes and exit to the Adjustments Search page.

## Related Links

[Setting Up Installation Options and User Preferences](#)



## Chapter 12

# Using Fulfillment Inquiry

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## Performing Fulfillment Inquiries Using the PeopleSoft Fluid User Interface

This topic discusses how to perform Fulfillment Inquiries.

## Pages Used to Performing Fulfillment Inquiries Using the PeopleSoft Fluid User Interface on a Mobile Device

This topic discusses how to perform Fulfillment Inquiries.

<i>Page Name</i>	<i>Usage</i>
<a href="#">Fulfillment Inquiry - Fluid Search Page</a>	Search for items to Fulfill.
<a href="#">Fulfillment Inquiry - Fluid Fulfillment Status Summary Page</a>	View the fulfillment status of available demand lines.
<a href="#">Fulfillment Inquiry - Fluid Specific Order Lines Page</a>	View available order lines.
<a href="#">Fulfillment Inquiry - Fluid Order Line Details Page</a>	View order line details.

## Fulfillment Inquiry - Fluid Search Page

Use the Fulfillment Inquiry - Fluid Search Page to search for items to fulfill.

Navigation:

**Mobile Inventory > Fulfillment Inquiry**

This example illustrates the fields and controls on the Fulfillment Inquiry - Fluid Search page. You can find definitions for the fields and controls later on this page.

Enter item search information for a particular fulfillment inquiry from the following:

<b>Field or Control</b>	<b>Description</b>
<b>Business Unit</b>	Displays the user's default business unit. You can change the business unit. The field is required.

<b>Field or Control</b>	<b>Description</b>
<b>Source</b>	Select a source from the drop-down list.
<b>Source Unit</b>	Enter a source business unit.
<b>Order No</b>	Enter the order number.
<b>State</b>	Select an available fulfillment state.
<b>Item ID</b>	Select a PeopleSoft system item ID on which to base the search. You can use the lookup icon to locate and select an item ID.
<b>Location</b>	Enter location information.
<b>Dest Unit</b>	Enter destination unit information.
<b>Ship To</b>	Enter the associated ship-to customer information.
<b>Sched Date</b>	Select a scheduled date option. The available values are Range, Specific and Today.  An additional option allows you to enter relative date values.
<b>Ship Date</b>	Select a ship date option. The available values are Range, Specific and Today.
<b>Additional Options</b>	Expand to use additional filters needed to find orders. The available options include Display total allocated quantity, Defer Deplete lines only, Hold and Backorders.

## Fulfillment Inquiry - Fluid Fulfillment Status Summary Page

Use the Fulfillment Inquiry - Fluid Fulfillment Status Summary page to view the fulfillment status of available demand lines.

Navigation:

**Mobile Inventory > Fulfillment Inquiry > and click an order number link.**

This example illustrates the fields and controls on the Fulfillment Inquiry - Fluid Grid Mode page. You can find definitions for the fields and controls later on this page.

## Fulfillment Inquiry ⋮

→

▼ **Line Totals**

0 Pending       0 Unfulfilled  
 0 Releasable     0 Released  
 0 Confirmed      1 Shipped  
 0 Depleted       0 Cancelled  
 0 On Hold

▼ **Stock Requests**

1 Rows

Order	Lines	Source Unit	Ship ID	Comments & Attachments
MSR0000039	1	US010	0000000030	Comments & Attachments

Return
Exit

---

**Note:** You can filter stock requests using keywords in the filter field on top of the page and selecting appropriate Line Totals check boxes.

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This example illustrates the fields and controls on the Fulfillment Inquiry - Fluid List Mode page. You can find definitions for the fields and controls later on this page.

US010\MSR0000039
⋮

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→

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∨ Line Totals

0 Pending

0 Unfulfilled

0 Releasable

0 Released

0 Confirmed

1 Shipped

0 Depleted

0 Cancelled

0 On Hold

---

∨ Stock Requests

1 Rows

Comments & Attachments

Order MSR0000039  
Lines 1  
Source IN  
Source Unit US010  
Ship ID 0000000030

Return

Exit

<i>Field or Control</i>	<i>Description</i>
<b>Return</b>	Click to navigate to the previous page.
<b>Exit</b>	Click to navigate to the Fulfillment Inquiry — Fluid Search page.
<b>Comments &amp; Attachments</b>	Click to view the comments and list of available attachments. On the <b>Comments &amp; Attachments</b> page, click any attachment file name link to view or download it.

## Fulfillment Inquiry - Fluid Specific Order Lines Page

Use the Fulfillment Inquiry - Fluid Specific Order Lines page to view available order lines.

Navigation:

**Mobile Inventory > Fulfillment Inquiry > and click an order line link.**

This example illustrates the fields and controls on the Fulfillment Inquiry - Fluid Specific Order lines page. You can find definitions for the fields and controls later on this page.

**US010\MSR0000039** ⋮

📊 ☰  ➔

∨ **Line Totals**

0 Pending     0 Unfulfilled  
 0 Releasable     0 Released  
 0 Confirmed     1 Shipped  
 0 Depleted     0 Cancelled  
 0 On Hold

∨ **Order Lines**

1 Rows

Line	State	Item ID	Comments & Attachments
1\1\1	Shipped	10000 Long Sleeve Biking Jersey, Men	<a href="#">Comments &amp; Attachments</a>

Return
Exit

## Fulfillment Inquiry - Fluid Order Line Details Page

Use the Fulfillment Inquiry - Fluid Order Lines Details page to view order line details .

Navigation:

**Mobile Inventory > Fulfillment Inquiry > and view details.**

This example illustrates the fields and controls on the Fulfillment Inquiry - Fluid Order Line Details page. You can find definitions for the fields and controls later on this page.

**US010\MSR0000039** ⋮

---

**Line** 1\1\1

**State** Shipped

**Resv Status** Reserved, All Rules Met

**Item ID** 10000

Long Sleeve Biking Jersey, Men

**Ship To** USA - Phoenix

**Location** US010

**Ship ID** 0000000030

**Ship Date** 08/10/2023

> **Quantities**

---

> **Dates**

---

> **Flags**

Lot/Expiration Date	Serial	Area	Qty
NONE	NONE	AREA1\1	1

Return
Exit

## Related Links

[Setting Up Installation Options and User Preferences](#)



# Using Mobile Inventory to Move Stock

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## Setting Up Options for Bin to Bin Transfers

This topic discusses how to setup bin to bin transfers.

### Pages Used to Set up Options for Bin to Bin Transfers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Define installation options for the bin to bin transfer task flow.
<u>User Preferences - Mobile Inventory - Fluid (Bin to Bin Transfers) Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for the bin to bin transfer task flow.

### Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define installation options for the bin to bin transfer task flow.

Navigation:

**Set Up Financials/Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

Select Bin to Bin Transfer in the Task Flow field.

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid page (Bin to Bin Transfer task flow). You can find definitions for the fields and controls later on this page.

Use this page to set up default options for bin to bin transfers at the installation level for mobile devices.

<b>Field or Control</b>	<b>Description</b>
<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> .  For more information about alternate items:  See <a href="#">Setting Up Alternative Item Identifiers</a> .
<b>Lookups</b>	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.
<b>Entry UOM Enabled</b> (entry unit of measure enabled)	Select this check box to indicate that the <b>Entry UOM</b> 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 <b>Stor UOM</b> (storage unit of measure) field on the Mobile Inventory - Bin to Bin Transfer page.
<b>Default Stocking UOM</b> (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.

<b>Field or Control</b>	<b>Description</b>
<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 only the item ID is to be used for filtering, which also improves system performance.</p>

## User Preferences - Mobile Inventory - Fluid (Bin to Bin Transfers) Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) 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 - Fluid.**

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 - Fluid 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 - Fluid Page](#).

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## Transferring Stock Using the PeopleSoft Fluid User Interface on a Mobile Device

This topic discusses how to transfer stock using a mobile device.

### Pages Used to Transfer Stock Using the PeopleSoft Fluid User Interface on a Mobile Device

Use these pages to transfer stock using a mobile device:

<b>Page Name</b>	<b>Usage</b>
<a href="#">Bin to Bin Transfer - Fluid Page</a>	Transfer stock using a mobile device.

### Bin to Bin Transfer - Fluid Page

Use the Bin to Bin Transfer - Fluid page to transfer stock using a mobile device

Navigation:

**Mobile Inventory > Bin to Bin Transfer**

This example illustrates the fields and controls on the Bin to Bin Transfer - Fluid page. You can find definitions for the fields and controls later on this page.

**Bin to Bin Transfer**

\*Business Unit

\*Location

\*Item ID

\*UOM

**Quantity Available**

\*Quantity

\*Dest Loc

**Save**



<b>Field or Control</b>	<b>Description</b>
<b>Location</b>	Select a storage location for the item to add. You can either enter a location or select a value from the Lookup icon ; the system displays the Look Up Storage Location page then.
<b>Item ID</b>	Select an item to add to the count.
<b>Description</b>	Displays a description of the item below the Item ID.
<b>Lot ID</b>	Select or enter a lot ID. <hr/> <b>Note:</b> This field is available only for lot, or serial and lot controlled items. <hr/> When you enter an item, the lot ID or the serial ID option is displayed.
<b>Expiration Date</b>	Displays expiration date of the Lot ID. This field is displayed when you enter the Lot ID which exists in the system.
<b>UOM</b>	Enter the unit of measure in which the item is stored. For example <i>EA</i> or <i>BOX</i> . If this value changes then the count unit of measure also changes automatically to match the new value.
<b>Quantity Available</b>	View the quantity of the available quantity within the storage location selected. This field is display only.
<b>Quantity</b>	Enter the item quantity which you want to transfer
<b>Dest Loc</b>	Enter the storage location to which you want to transfer items.
<b>Save</b>	Click to save the transfer. The system performs validations on the transaction. If no errors occur, 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.

## Related Links

[Setting Up Installation Options and User Preferences](#)



## Chapter 14

# Using Picking Feedback

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## Understanding Picking Feedback

Inventory Picking Feedback allows you to complete a mobile pick confirmation transaction. A Pick Batch ID is essentially a pick plan identifier with multiple pick lines associated with it.

A Picking Feedback transaction includes picking feedback search, batch line detail, and line update.

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## Defining Setup and Installation Options for Mobile Picking Feedback

This topic discusses how to define setup and installation options for mobile picking feedback.

### Pages Used to Define Installation Options and User Preferences for Mobile Inventory Picking Feedback

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>User Preferences - Mobile Inventory - Fluid Page</u>	OPR_DEF_TABLE_MIN	Define user preferences for Mobile Picking Feedback.
<u>Installation Options - Mobile Inventory - Fluid Page</u>	INSTALLATION_MIN_N	Define Mobile Picking Feedback installation options.

### User Preferences - Mobile Inventory - Fluid Page

Use the User Preferences - Mobile Inventory - Fluid page (OPR\_DEF\_TABLE\_MIN) to define user preferences for Mobile Picking Feedback.

Navigation:

**Set Up Financials/ Supply Chain > Common Definitions > User Preferences > Define User Preferences > Mobile Inventory - Fluid**

Select the Picking Feedback task flow.

This example illustrates the fields and controls on the User Preferences - Mobile Inventory - Fluid : Picking Feedback page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'User Preferences - Mobile Inventory - Fluid' interface. At the top, there are tabs for 'User Preferences' and 'Mobile Inventory - Fluid'. Below the tabs, user details are shown: 'User ID' is 'VP1', 'Name' is 'Default Operator', and 'Role Name' is an empty input field with a search icon. The main section is titled 'Task Options' and includes a 'Find | View All' header with 'First', '1 of 1', and 'Last' navigation. The 'Task Options' section contains several dropdown menus: 'Task Flow' is set to 'Picking Feedback', '\*Initial Display Mode' is 'All Items Grid', '\*Sort By' is 'Item', and '\*Group by' is 'Location'. There is a 'Show on Page' section with checkboxes for 'Lookups', 'Description', 'Find', 'Prior Entry Display', and 'Filter All Alternate Items'. A 'Use Installation Values' checkbox is also present. At the bottom, there are four buttons: 'Save', 'Return to Search', 'Notify', and 'Refresh'. The footer shows 'User Preferences | Mobile Inventory - Fluid'.

## Installation Options - Mobile Inventory - Fluid Page

Use the Installation Options - Mobile Inventory - Fluid page (INSTALLATION\_MIN\_N) to define Mobile Picking Feedback installation options.

Navigation:

**Set Up Financials/ Supply Chain > Install > Installation Options > Mobile Inventory - Fluid**

Select the Picking Feedback task flow.

This example illustrates the fields and controls on the Installation Options - Mobile Inventory - Fluid: Picking Feedback page.

### Related Links

“Setting Up Application-Specific Installation Options” (Application Fundamentals)  
[Setting Up Installation Options and User Preferences](#)

## Performing Picking Feedback Using the PeopleSoft Fluid User Interface in Mobile Inventory Management

This topic discusses how to perform a mobile picking feedback search, retrieve pick batch line details, and add or update pick lines.

### Pages Used to Perform Picking Feedback in Mobile Inventory Management

Use these pages to perform picking feedback.

<b>Page Name</b>	<b>Usage</b>
<a href="#">Picking Feedback - Fluid Search Page</a>	Perform a picking feedback search.
<a href="#">Picking Feedback - Fluid Single or Multi Item Page</a>	View, update or add, pick lines associated with a pick batch ID.

<b><i>Page Name</i></b>	<b><i>Usage</i></b>
<u>Picking Feedback - Fluid Add Item Page</u>	Pick items from a different storage location for the current item order line.

## **Picking Feedback - Fluid Search Page**

Use the Picking Feedback - Fluid Search page to perform a search.

Navigation:

**Mobile Inventory** > **Picking Feedback** and click the **Search** button.

This example illustrates the fields and controls on the Picking Feedback - Fluid Search page. You can find definitions for the fields and controls later on this page.

<i>Field or Control</i>	<i>Description</i>
<b>Business Unit</b>	Displays the default business unit established for the user. You can select another business unit in which to search for picking feedback.
<b>Pick Batch ID</b>	Enter a pick batch ID.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Demand Source</b>	Select a source from the drop-down list.
<b>Source Business Unit</b>	Enter a source business unit.
<b>Order No</b>	Enter the order number.
<b>Order Line</b>	Enter line information.
<b>Ship To Customer</b>	Enter the ship-to customer location associated with picking feedback.
<b>Location Code</b>	Enter location information.
<b>Load ID</b>	Enter the load ID.
<b>Carrier ID</b>	Enter carrier information.
<b>Route Code</b>	Enter route information.
<b>Route Group</b>	Enter route group information.

## Picking Feedback - Fluid Single or Multi Item Page

Use the Picking Feedback - Fluid Single or Multi Item page to view, update or add pick lines associated with a pick batch ID.

Navigation:

**Mobile Inventory > Picking Feedback** and select a **Pick Batch ID**.



This example illustrates the fields and controls on the Picking Feedback - Fluid Grid Mode Page . You can find definitions for the fields and controls later on this page.

Batch ID US01014

Confirm All 1 row

Item ID	Order Quantity	Location Quantity	Confirm
10000 Long Sleeve Biking Jersey, Men's	6 EA	6 EA	<input type="checkbox"/>

AREA1\1 (1 of 1)

Submit Exit

<i>Field or Control</i>	<i>Description</i>
<b>Item ID</b>	Displays the PeopleSoft Inventory item ID, Description and Serial or Lot ID information.
<b>Order Quantity</b>	Displays the requested quantity and order UOM as on order.

<b>Field or Control</b>	<b>Description</b>
<b>Location Quantity</b>	Displays the quantity picked and storage UOM for the given storage location. This is an editable field.
<b>Confirm</b>	Select to confirm the item on row.
<b>Confirm All</b>	Select to confirm items on all rows of the page. <hr/> <b>Note:</b> This option is displayed only when group by location is selected. <hr/>

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**Note:** Mark a Location Quantity lesser than the Order Quantity and select Confirm to access the Picking Feedback — Fluid Add Item Page.

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This example illustrates the fields and controls on the Picking Feedback - Fluid Single Item Mode page. You can find definitions for the fields and controls later on this page.

Batch ID US01014

Item ID 10000

Description Long Sleeve Biking Jersey, Men's

Batch ID\Line 4\1

Order No CEN0005\1\1

Storage Location AREA1\1

Order Quantity 6

Order UOM EA

Location Quantity

Location UOM EA

Confirm

Remove

**Prior Entry**

Item ID 10000

Storage Location AREA1\1

Order Quantity 6

Order UOM EA

Location Quantity 6

Location UOM EA

Picked

Item 1 of 1

**Note:** Click an Item ID link in grid view mode to display the item in Single Item mode. Click the Pick and Modify buttons to display prior entered data and modify such data respectively.

This example illustrates the fields and controls on the Picking Feedback - Fluid List Mode page . You can find definitions for the fields and controls later on this page.

Batch ID US0104

Confirm All    1 row

Item ID 10000  
 Description Long Sleeve Biking Jersey, Men's  
 Batch ID\Line 4\1  
 Order No CEN0005\1\1  
 Order Quantity 6  
 Order UOM EA  
 Location Quantity   
 Location UOM EA  
 Confirm  
 Remove

AREA1\1 (1 of 1)

## Picking Feedback - Fluid Add Item Page

Use the Picking Feedback - Fluid Add Item page to pick items from a different storage location for the current item order line.

Navigation:

**Mobile Inventory** > **Picking Feedback** and select the **Confirm** check box on the grid and list view pages or click the **Pick** button on the single item page.

**Note:** You must assign a lower value in the Location Quantity field as against that in Order Quantity.

This example illustrates the fields and controls on the Picking Feedback - Fluid Add Item page. You can find definitions for the fields and controls later on this page.

←
Batch ID US01014
🚩
☰

☰

☰

### Enter Item

---

Item ID 10000

Description Long Sleeve Biking Jersey, Men's

\*Storage Location  🔍

Remaining Quantity 3 EA

UOM Conversion

Order Quantity 6

Order UOM EA

\*Location Quantity

\*Location UOM  🔍

### Prior Entry

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Item ID 10000

Storage Location AREA111

Order Quantity 6

Order UOM EA

Location Quantity 3

Location UOM EA

Picked

Modify

Cancel

Add

<b>Field or Control</b>	<b>Description</b>
<b>Remaining Quantity</b>	Displays the Order Quantity that remains to be fulfilled.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>UOM Conversion</b>	Displays the Order UOM equivalent in Storage Location conversion type.

**Related Links**

[Setting Up Installation Options and User Preferences](#)