Infor Warehouse Mobility for LN User Guide

Release 6.01.10

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About Warehouse Mobility

Infor Warehouse Mobility is a comprehensive and robust data collection system that simplifies operations by streaming real-time information between the shop floor and your ERP system. Infor Warehouse Mobility handles all communications with your ERP system. Users select transactions and scan bar-coded data by using mobile radio frequency (RF) scanners. Infor Warehouse Mobility formats the data and transmits it to your ERP system. Any feedback from ERP is presented to the user exactly as it was received.

See "Using Warehouse Mobility on a Mobile Scanner".

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Overview

1

This module includes topics that describe Infor Factory Track LN features for warehouse mobility and how to use the transactions and forms.

Transaction processing

2

This chapter describes the transactions processes related to warehouse mobility of Factory Track LN.

Using Warehouse Mobility on a Mobile Scanner

You can use Infor Warehouse Mobility on mobile scanner devices to perform inventory, production, labor collection, picking, put away, receiving, and shipping transactions. To perform Time Track time and attendance transactions on a mobile scanner device, you must have the Time Track module implemented. For information about performing time, attendance, and team transactions using Time Track, see Using Time Track on a Mobile Scanner. When Time Track is implemented, these Warehouse Mobility transactions are replaced by Time Track transactions and are unavailable:

- Elapsed Hours
- Job Booking
- Manage Team
- Reset Employee
- Start/Stop Shift

You can access Warehouse Mobility transactions using a Web-based menu.

These mobile scanner transactions are available using Warehouse Mobility:

- Allocate Release
- Approvals
- As Built
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- Change Printer
- Change Warehouse
- Close Handling Unit
- Consignment Receipt
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- Crossdocking

- Customer Returns
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- Split Handling Unit
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- Unlink Handling Unit
- Unplanned Material Issue
- View Message
- Write Off
- Write On

Warehouse Mobility Transaction Summary Descriptions

Based on the LN Warehouse mobility transaction types as displayed in the Icon or menu list the categories can be further divided into groups:

Inbound Transactions

This section includes these transcations:

Receipts

Use the Receipts transaction to receive items into a warehouse. You can assign lot numbers, inventory dates, serial numbers, certificate numbers, and handling units to items. You can also print barcode labels as soon as items are received.

Note: If the item is serial-in-inventory, each serial number is received on a separate line in ERP LN.

To streamline your inventory management processes, you can opt to put away inventory from within this transaction. Additionally, when items are needed urgently for an order, you can perform cross docking from within this transaction.

See "Receiving Items" on page 38.

Approvals

Use the Approvals transaction to approve, reject, or destroy inspected items.

To streamline your inventory management processes, you can opt to put away inventory from within this transaction. Additionally, when items are needed urgently for an order, you can perform cross docking from within this transaction. You can only put away or cross dock items that have been approved.

See "Approving and Rejecting Inspected Items" on page 49.

Putaway

Use the standalone Putaway transaction to put away items if you have not opted to combine put away with another transaction, such as Receipts. You can put away items using a receipt number, order number, or storage list.

The Putaway transaction provides built-in consolidation logic. Instead of putting an item away to a random or empty location, you can select from a list of locations where the item is already available, thereby consolidating items into a smaller pool of locations.

See "Putting Away Items" on page 46.

Receipt Label Print

Use this transaction form to print labels for a warehouse receipt. The labels include the inbouding data entered on the scanner.

See "Printing Warehouse Receipt Labels"

ASN Receipt

Use the ASN Receipts transaction to receive items using an advanced shipment notice (ASN). You can use the ASN number, packing list number, or packing slip number to receive items. You can choose to receive all items on the receipt or select individual lines to receive.

To streamline your inventory management processes, you can opt for immediate put away inventory which is only available when specific lines are being received.

See "Receiving ASN Items" on page 41.

Consignment Receipt

You can use the Consignment Receipt transaction to receive items that are not part of a purchase order into a consignment warehouse.

See "Receiving Items Into Consignment Warehouses" on page 45.

Customer Returns

Use the Customer Returns transaction to receive items that customers have returned without an RMA.

See "Receiving Customer Returns without an RMA" on page 43.

Inventory Transactions

This section includes these transcations:

Inventory Transfer

You can use the Inventory Transfer transaction to move unallocated items from one location to another, either within a warehouse or between warehouses. Only use this transaction for unplanned item transfers. For planned transfers, where separate picking and receiving processes are required, use the Picking and Receiving transactions.

See "Picking Items" on page 51 and "Receiving Items" on page 38.

If you are moving items in containers or from containers, as opposed to "loose" inventory items, you must specify handling units. See "Relocating Containers".

See "Relocating Items" on page 34.

Item Inquiry

Use the Item Inquiry transaction to look up the on-hand, allocated, and free inventories of a specified item. When applicable, you can view item serial numbers, lot numbers, inventory dates, and handling units. The Item Inquiry transaction shows a list of all locations with free quantities, based on item and warehouse inputs.

See "Viewing Inventory Status".

Location Inquiry

Use the Location Inquiry transaction to view the inventory quantities at a location. You can view on-hand, allocated, and free quantities in addition to, when applicable, item serial numbers, lot numbers, inventory dates, and handling units.

See "Viewing Inventory at a Stock Point" on page 37.

Cycle Count

Use the Cycle Count transaction to verify inventory quantities of specified items. After cycle count sheets are generated in ERP LN, you can view the count list on the scanner by specifying the warehouse order number. You can then verify the item quantities at stock points and record your physical counts in ERP LN within this transaction.

To ensure that the correct items and stock points are counted, you can use the transaction parameters to require users to scan the item number, location, and lot number. If there is a mismatch between the scanned values and the selected count item, an error message is displayed.

See "Counting Items" on page 30.

Physical Inventory

Use the Physical Inventory transaction to verify the inventory at specified locations in your warehouse. Scan item quantities at warehouse locations to create accurate physical counts. Any variances between these counts and the records in ERP LN are recorded for investigation. Inventory records for locations in ERP LN are automatically adjusted to match the physical counts.

See "Counting Items" on page 30.

Global Transfer

Use the Global Transfer transaction to move the contents of all stock points at one location to another location within a warehouse. For example, if a location is damaged or affected by an environmental hazard, such as moisture, you may need to move all inventory out of that location. Both available and allocated items are relocated when you use this transaction. You can only use this transaction within a location-controlled warehouse. To relocate from one warehouse to another, you must move each stock point individually using the Inventory Transfer transaction.

See "Relocating Items" on page 34.

Inventory Adjustment

Use the Inventory Adjustment transaction to adjust inventory quantities at a stock point.

See "Adjusting Inventory at a Stock Point" on page 29.

Write Off

You can use the Inventory Write Off transaction to decrease an item's quantity at a stock point.

See "Decreasing Inventory at a Stock Point" on page 25.

Write On

You can use the Inventory Write On transaction to increase an item's quantity at a stock point.

See "Increasing Inventory at a Stock Point" on page 27.

Outbound Transactions

This section includes these transcations:

Picking

Use the Picking transaction to pick items allocated for usage. Using the outbound advice logic of ERP LN, the scanner directs you as to which item quantities to pick and from which stock points. You can sort these stock points by location to improve picking efficiency.

Using the transaction parameters, you can require that item number, lot number, inventory date, location, and handling unit be scanned for verification to improve operational discipline.

See "Picking Items" on page 51.

Allocate Release

Use the Allocate Release transaction to pick items for orders that are not associated with a pick list. With this transaction, you can decide from which locations items should be picked. You can configure the transaction to automatically generate and release outbound allocations when items are picked.

See "Picking Items for Orders Without a Pick List" on page 57.

Release Outbound

Use the Release Outbound transaction to release order lines for shipment or to confirm a pick list.

See "Releasing Outbound Order Lines" on page 60.

Shipment Handling

Use the Shipment Handling transaction to manage shipments. You can use this transaction to:

- confirm shipments
- freeze shipments
- unfreeze shipments
- print packing slips
- print bills of lading

See "Managing Shipments" on page 60.

Return From Staging

Use the Return from Staging transaction to return items from the staging area back into inventory when a shipment has been canceled or modified. You can only return items from staging that have previously been released by a Picking or Release Outbound transaction.

See "Returning Items from Staging" on page 62.

Packing Transactions

This section includes these transcations:

Packing By Order

Use the Packing by Order transaction to pack items for an order before releasing the outbound or confirming picking. There are two ways that you can pack items using this transaction:

- Using pre-packed items:

  Use this packing method if the items on the order line are already packed in a container structure that meets the shipping requirements. You can confirm that the container structure is correct, or, if there are problems with the container structure, you can break it up and rebuild the structure manually.

- Packing items without a pre-defined structure

  Use this packing method if the items on the order line do not need to match a specific container structure. Using your own discretion, you can create any container structure that is appropriate for the situation.

You may need to use multiple packing methods for an order.

See "Packing Items by Order" on page 93.

Packing By Shipment

Use the Packing by Shipment transaction to pack items for a shipment. There are three ways that you can pack items using this transaction:

- Using pre-packed items:

  Use this packing method if the items on the shipping line are already packed in a container structure that meets the shipping requirements. You can confirm that the container structure is correct, or, if there are problems with the container structure, you can break it up and rebuild the structure manually.

- Packing items using a pre-defined structure:

  Use this packing method if the items on the shipping line must be packed in a pre-defined container structure that does not match the current structure of the picked items. You can create a container structure for the items that meets the shipping requirements.

- Packing items without a pre-defined structure:

  Use this packing method if the items on the shipping line do not need to match a specific container structure. Using your own discretion, you can create any container structure that is appropriate for the situation.

You may need to use multiple packing methods for a shipment.

See "Packing Items by Shipment" on page 96.

Repacking

Use the Repacking transaction to modify the container structure of a package. You can use this transaction to perform these actions:

- add a package to another package
- remove a package from another package
- unpack a package

See "Repacking Items" on page 101.

Sealing

Use the Sealing transaction to seal packages. After sealing a package, you can also choose to freeze shipment lines associated with that package.

See "Sealing Packages" on page 102.

Loading

Use the Loading transaction to load packages. You can only load sealed packages that are associated with a shipment.

See "Loading Packages" on page 105.

Packing Inquiry

Use the Packing Inquiry transaction to view the packaging structure for a shipment or order.

See "Viewing Packages" on page 104.

Handling UnitTransactions

This section includes these transcations:

Create Handling Unit

When you put inventory into a new container, such as a box, you can use the Create Handling Unit transaction to create a handling unit for that container to track the contents and location of the container.

See "Creating Handling Units for New Containers" on page 77.

Split Handling Unit

When you take items out of a container, you can add them to another container or designate them as loose inventory using the Split Handling Unit transaction.

See "Removing Items from a Container" on page 80.

Link Handling Unit

To add a container to a group of containers, you must link the container handling unit to the group handling unit using the Link Handling Unit transaction. For example, if you add a box to a pallet, you must link the box handling unit to the pallet handling unit.

See "Adding Containers to Groups" on page 79.

Unlink Handling Unit

Use the Unlink Handling Unit transaction to remove a container from a container structure. For example, if you remove a box from a pallet, you must unlink the box handling unit to the pallet handling unit.

See "Removing Containers from Container Structures" on page 80.

Close Handling Unit

When you remove all items from a container, you can use the Close Handling Unit transaction to close or delete the handling unit assigned to that container. If you keep the container, close the handling unit instead of deleting the handling unit, so you can re-use the handling unit in the future.

See "Emptying a Container" on page 81.

Handling Unit Inquiry

You can use the HU Inquiry transaction to view details about a container.

See "Viewing Container Details" on page 82.

Labor Transactions

This section includes these transcations:

Start/Stop Shift

Use the Start/Stop Shift transaction to start or stop your shift.

This transaction is only available when the Time Track module is not implemented.

See "Starting Shifts" on page 92 and "Stopping Shifts" on page 92.

Job Booking

Use the Job Booking transaction to report hours and completed quantities to jobs. You can start and stop individual jobs, or, if you are a workset-enabled employee, you can start and stop multiple jobs using a workset. You can use this transaction as an individual employee or as a team.

This transaction is only available when the Time Track module is not implemented.

See "Starting Jobs" on page 82 and "Stopping Jobs" on page 87.

Elapsed Hours

Use the Elapsed Hours transaction to report labor and quantities to jobs. You can use this transaction as an individual employee or as a team.

This transaction is only available when the Time Track module is not implemented.

See "Reporting Elapsed Hours" on page 88.

Manage Team

Use the Manage Team transaction to add and remove members from a team and to view the employees currently assigned to a team.

This transaction is only available when the Time Track module is not implemented.

See "Joining Teams" on page 91, "Leaving Teams" on page 91, and "Viewing Teams" on page 93.

Reset Employee

Use the Reset Employee transaction to return an employee to an idle state. The employee's shift will be ended, and the employee will be removed from any teams and unassigned from any activities. If employee information is entered using ERP LN, you can use this transaction to reset the employee's information in Factory Track to match the new information in ERP LN.

This transaction is only available when the Time Track module is not implemented.

See "Resetting the Status of an Employee" on page 92.

Production Transactions

This section includes these transcations:

Report Operation

Use the Report Operation transaction to track production progress by reporting the completion of items for operations.

See "Reporting Completed Operations" on page 64.

Report Production

Use the Report Production transaction to track production progress by reporting the completion of production items.

To streamline your inventory management processes, you can opt to put away inventory from within this transaction. Additionally, when items are needed urgently for an order, you can perform cross docking from within this transaction.

See "Reporting Completed Production" on page 65.

Unplanned Material Issue

Use the Unplanned Material Issue transaction to pick items for a production order in addition to those listed on the pick list. These additional items are added to the order on a new line. This transaction provides you flexibility to decide the locations from which items should be picked. You can configure the transaction to automatically generate and release outbound allocations when items are picked.

See "Issuing Unplanned Material" on page 69.

As Built Maintenance

Use the As-Built Maintenance transaction to link serial-controlled or lot-controlled component items to end items. Linking these items helps you to track, by serial or lot number, the components that are used to build items on a production order. You can link each end item serial number to the specific component serial or lot number that is used to build that end item.

See "Linking Component Items to End Items" on page 67.

Return Material

Use the Return Material transaction to return items to inventory that were previously issued to a production order.

See "Returning Items from Production" on page 67.

Report Scrap/Quarantine

You can use this transaction to dispose of previously-rejected quantities against a production order operation.

See "Disposition of Rejects reported against Production Operations" on page 71

Report Repetitive

You can use this transaction to report quantities against Repetitive Orders.

See "Reporting Quantities against Repetitive Orders" on page 72

Repetitive Time

You can use this transaction to record time activities against a Work Cell Shift in a repetitive scenario.

See "Reporting Time against Repetitive Orders (Repetitive Time)" on page 73

Kanban Transactions

This section includes these transcations:

Kanban Cancel

Use the Kanban Cancel transaction to remove a Kanban from use. If you need to use the Kanban again at a later time, you can use the Kanban Reinstate transaction.

See "Canceling Kanbans" on page 75.

Kanban Create

Use the Kanban Create transaction to create Kanbans. Kanbans that you create using this transaction are based on existing Kanban loops that have been configured in ERP LN.

See "Creating Kanbans" on page 73.

Kanban Delivery

Use the Kanban Request transaction to deliver items to a Kanban location that have been received to fill a Kanban request.

See "Delivering Kanban Items" on page 75.

Kanban Reinstate

Use the Kanban Reinstate transaction to return a previously canceled Kanban to use.

See "Reinstating Kanbans" on page 76.

Kanban Request

Use the Kanban Request transaction to request the replenishment of a Kanban when it has been depleted. The type of order that is generated for the request is determined by the Kanban loop defined for the Kanban.

See "Requesting Kanban Replenishments" on page 74.

Kanban Reset

Use the Kanban Reset transaction to reset the status of a Kanban to **In Stock**.

See "Resetting Kanbans" on page 76.

Kanban Status

Use the Kanban Status transaction to view the status of a Kanban.

See "Viewing the Status of Kanbans" on page 77.

Utilities

This section includes these transcations:

Change Warehouse

Use the Change Warehouse transaction to temporarily change the warehouse which the user is working in.

Change Printer

Use the Change Printer transaction to temporarily change the printer assigned to the user for label printing purposes.

Label Reprint

Use the Label Reprint transaction to reprint any previously-reprinted barcode label.

Device Allocation

Use the Device Allocation transaction to issue and return devices.

See "Issuing and Returning Devices".

View Message

Use the View Message transaction to view and acknowledge any Factory Track messages sent to you by the system or your administrator.

Process Descriptions

3

This chapter describes in detail the transactions related to the warehouse mobility module of Factory Track for LN.

Inventory Handling Capabilities

This section prodvides transaction processing:

Adjusting Inventory

Three transactions allow the operator to adjust the levels of inventory at a stock point. These are the Inventory Write Off (to reduce the inventory of a specific stock point), the Inventory Write On (to increase the inventory of a specific stock point or create a new stock point) and the Inventory Adjustment (to change the current inventory quantity of a specific stock point). This third transaction allows the inventory level to be increased or decreased and is used primarily when the stock point is held by weight or volume.

Note: If the item and warehouse has any project pegging, the relevant peg(s) must be specified.

Decreasing Inventory at a Stock Point

You can use the Inventory Write Off transaction to decrease an item's quantity at a stock point.

The warehouse mobility icon based menu and list based menu comprises of the Inventory Transactions. Inventory Write Off is listed as a transaction under the Inventory Transactions.

On the Inventory Transactions:

1 Select **Inventory Write Off**.
2 Specify this information:

Employee
Specify your employee badge number.

Warehouse
Specify the warehouse location of the item.

Reason Code
Specify the reason code for the write off.

Item
Scan the item number.

Serial
If you are performing this transaction using a single serial-in-inventory time, scan the serial number. Otherwise, leave this field blank.

Location
Scan the location for which to decrease the item quantity.

Lot
Scan the lot number, if applicable.

Inventory Date
Scan the item inventory date, if applicable.

On Hand
The recorded on-hand quantity is displayed.

Quantity
Specify a number to subtract from the item's quantity.

Note: An additional write off form is displayed, to display the inventory with the pegged items for the projects. The user can select the appropriate pegged item for transferring.

3 Select **Process**. If the item is not serial-controlled and does not need to be assigned a lot number, the item quantity is decreased in ERP LN. If the item is serial-controlled or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

   a On the Serial/Lot Entry screen, specify or review this information:

   Item number
   The item number and description are displayed.

   Quantity remaining
   The quantity that needs to be assigned serial or lot numbers is displayed.

   Generate Serials?
   To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

   All Serials?
   Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

b Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. If all needed serial and lot numbers have been scanned, the item quantity is decreased in ERP LN. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Increasing Inventory at a Stock Point

The warehouse mobility icon based menu and list based menu comprises of the Inventory Transactions. Inventory Write On is listed as a transaction under the Inventory Transactions.

On the Inventory Transactions:

1. Select **Inventory Write On**.
2. Specify this information:

Employee
Specify your employee badge number.

Warehouse
Specify the warehouse location of the item.

Reason Code
Specify the reason code for the write off.

Item
Scan the item number.

Serial
If you are performing this transaction using a single serial-in-inventory time, scan the serial number. Otherwise, leave this field blank.

Location
Scan the location for which to decrease the item quantity.

Lot
Scan the lot number, if applicable.

Inventory Date
Scan the item inventory date, if applicable.

On Hand
The recorded on-hand quantity is displayed.

Quantity
Specify a number to subtract from the item's quantity.

Note: An additional write on form is displayed, to display the inventory with the pegged items for the projects. The user can select the appropriate pegged item for transferring.

3 Select **Process**. If the item is not serial-controlled and does not need to be assigned a lot number, the item quantity is increased in ERP LN. If the item is serial-controlled or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

   a On the Serial/Lot Entry screen, specify or review this information:

   Item number
   The item number and description are displayed.

   Quantity remaining
   The quantity that needs to be assigned serial or lot numbers is displayed.

   Generate Serials?
   To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

   All Serials?
   Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

   Lot Number
   If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

   Serial Number
   Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

   Quantity
   Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

   b Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. If all needed serial and lot numbers have been scanned, the item quantity is increased in ERP LN. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Adjusting Inventory at a Stock Point

Use the Inventory Adjustment transaction to adjust inventory quantities at a stock point.

The warehouse mobility icon based menu and list based menu comprises of the Inventory Transactions. Inventory Adjustment is listed as a transaction under the Inventory Transactions.

On the Inventory Transactions:

1. Select **Inventory Adjustment**.
2. Specify this information:

   Employee
   Specify your employee badge number.

   Warehouse
   Specify the warehouse location of the item.

   Reason Code
   Specify the reason code for the write off.

   Item
   Scan the item number.

   Serial
   If you are performing this transaction using a single serial-in-inventory item, scan the serial number. Otherwise, leave this field blank.

   Location
   Scan the location for which to decrease the item quantity.

   Lot
   Scan the lot number, if applicable.

   Inventory Date
   Scan the item inventory date, if applicable.

   On Hand
   The recorded on-hand quantity is displayed.

   Quantity
   Specify a new quantity for the item at this stock point.

   Note: An additional inventory adjustment form is displayed, to display the inventory with the pegged items for the projects. The user can select the appropriate pegged item for transferring.

3. Select **Process**. If the item is not serial-controlled and does not need to be assigned a lot number, the item quantity is adjusted in ERP LN. If the item is serial-controlled or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.
4. On the Serial/Lot Entry screen, specify or review this information:

   Item number
   The item number and description are displayed.

   Quantity remaining
   The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

5. Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. If all needed serial and lot numbers have been scanned, the item quantity is adjusted in ERP LN. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Counting Inventory

You can count inventory by item or by location. Count by item to verify the quantity and location of items. When counting by item, you verify information for items on a count list. Count by location to verify the contents of warehouse locations. When counting by location, you can add stock points to the count as needed.

Two transactions allow the operator to perform these actions. Counting by Item is the Cycle Count. Counting by Location is the Physical Inventory. Once the counts have taken place, the standard Infor LN processing is required to process the counted quantities and adjust the inventory levels.

See "Counting Items by Item" on page 31.

See "Counting Items by Location" on page 33.

Note: If the item and warehouse has any project pegging, the relevant peg(s) must be specified.

Counting Items by Item

The warehouse mobility icon based menu and list based menu comprises of the Inventory Transactions. Cycle Count is listed as a transaction under the Inventory Transactions.

On the Inventory Transactions:

1 Select **Cycle Count**.
2 Specify this information:

   Count
   To recount items, specify a new count number. When you specify a new count number, the count list is refreshed. Use the default value of **1** for your initial count.

   Handling Unit
   Specify a handling unit for the item.

   Warehouse
   Specify the warehouse.

   From Location and To Location
   Optionally, specify a from and to location to only include items within, and including, those two locations in the count list.

   Cycle Count Order
   If applicable, specify a cycle count order number. If you are using handling units, the cycle count order number is displayed and cannot be changed.

3 Select **Next**. The count list is displayed.
4 Select an item to count.
5 Specify or review this information:

   Cycle Count Order
   The cycle count order you are counting is displayed.

   Location
   The item location is displayed. If the stock point is not location-controlled, this field is blank. This field is only displayed if the **Display Location** parameter is selected for this transaction.

   Scan Location
   If applicable, scan the item location. This field is only displayed if the stock point is location-controlled and the **Scan Location** parameter is selected for this transaction.

   Item
   The item number is displayed. This field is only displayed if the **Display Item** parameter is selected for this transaction.

   Scan Item
   Scan the item number. This field is only displayed if the **Enter Item** parameter is selected for this transaction.

   Inventory Date
   The inventory date is displayed. If the item is not date-controlled, this field is blank. This field is only displayed if the **Display Date** parameter is selected for this transaction.

Scan Date
If applicable, scan the inventory date. This field is only displayed if the item is date-controlled and the **Enter Date** parameter is selected for this transaction.

Lot
The lot number is displayed. If the item is not lot-controlled, this field is blank. This field is only displayed if the **Display Lot** parameter is selected for this transaction.

Scan Lot
If applicable, scan the lot number. This field is only displayed if the item is lot-controlled, and the **Enter Lot** parameter is selected for this transaction.

Quantity
Specify the counted quantity.

Note: An additional cycle count form is displayed, to display the inventory with the pegged items for the projects.

6 Select **Process**. The cycle count is processed and the specified project, element and activity fields are displayed in the new form.

7 Select **Process**. If the item is not serial-controlled, the item is removed from the count list, and the count quantity is recorded in ERP LN. If the item is serial-controlled, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if you are performing a transaction using all the items in a stock point.

Serial Number
Scan a serial number. This field is only displayed if you did not select **Yes** in the **All Serials?** field.

b Select **Process**. The scanned serial number is processed. If there are additional serial numbers to scan, scan them. If all needed serial numbers have been scanned, the item is removed from the count list, and the count quantity is recorded in ERP LN. Optionally, press **X** to view serial numbers that you have scanned. Optionally, press **Y** to reset all scanned serial numbers, so you can re-scan them.

Counting Items by Location

The warehouse mobility icon based menu and list based menu comprises of the Inventory Transactions. Physical Inventory is listed as a transaction under the Inventory Transactions.

On the Inventory Transactions:

1 Select **Physical Inventory**.
2 Specify this information:

   Accumulate
   Specify **Yes** to add the counted quantity to a previously counted quantity, if the item and stock point combination you are counting has already been counted for this order. Specify **No** to receive an error message if you mistakenly count an item and stock point combination more than once within an order.

   Count
   To recount items, specify a new count number. When you specify a new count number, the count list is refreshed. Use the default value of **1** for your initial count.

   Warehouse
   Specify a warehouse.

   Cycle Count Order
   If applicable, specify a cycle count order number. If you are using handling units, the cycle count order number is displayed and cannot be changed.

   Item
   Scan the item number. The item description and unit of measure are displayed.

   Location
   If applicable, scan the item location. This field is only displayed if the stock point is location-controlled.

   Lot
   If applicable, scan the lot number. This field is only displayed if the item is lot-controlled, and the **Enter Lot** parameter is selected for this transaction.

   Quantity
   Specify the counted quantity.

   Note: An additional physical inventory form is displayed, to display the inventory with the pegged items for the projects.

3 Select **Process**. If the item is not serial-controlled, the item is removed from the count list, and the count quantity is recorded in ERP LN. If the item is serial-controlled, the Serial/Lot Entry screen is displayed.

   a On the Serial/Lot Entry screen, specify or review this information:

      Item number
      The item number and description are displayed.

      Quantity remaining
      The quantity that needs to be assigned serial or lot numbers is displayed.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if you are performing a transaction using all the items in a stock point.

Serial Number
Scan a serial number. This field is only displayed if you did not select **Yes** in the **All Serials?** field.

4 Select **Process**. The scanned serial number is processed. If there are additional serial numbers to scan, scan them. If all needed serial numbers have been scanned, the item is removed from the count list, and the count quantity is recorded in ERP LN. Optionally, press **X** to view serial numbers that you have scanned. Optionally, press **Y** to reset all scanned serial numbers, so you can re-scan them.

Transferring Inventory

You can use the Inventory Transfer transaction to move items from one location to another, either within a warehouse or between warehouses. Use this transaction only for unplanned item transfers. For planned transfers, where separate picking and receiving processes are required, use the Picking and Receiving transactions. See "Picking Items" on page 51 and "Receiving Items" on page 38 for instructions on using those transactions.

If you are moving items in containers or from containers, as opposed to "loose" inventory items, you must specify handling units. See "Relocating Containers" for instructions.

You can move items from one location to another location by performing transfer transaction for one stock points at a time, or you can move the contents of all stock points at one location to another location in single transaction. For example, if location is damaged or affected by an environmental hazard, such as moisture, you may need to move all inventory out of that location. To relocate items from an individual stock point, use the Inventory Transfer transaction. To relocate all items from all stock points at a location, use the Global Transfer transaction. You can only use the Global Transfer transaction for location-controlled warehouses.

See "Relocating Items from One Location to Another Location" on page 34.

See "Relocating All Stock Points at a Location" on page 36.

Transferring Items from One Location to Another (Inventory Transfer)

Inventory Transfer is a transaction belonging to the Inventory Sub-Menu on the Warehouse Mobility icon based and list based menus.

Note: If the item and warehouse has any project pegging, the relevant peg(s) must be specified.

On the Inventory Transactions:

1 Select **Inventory Transfer**.

2 Specify or review this information:

Reference ID
If Reference IDs are being used, a Handling Unit, Serial Number or Lot Number can be entered in this field. If this field is used, the relevant information is prefilled on the main form.

From Warehouse
The warehouse where the item is located.

Handling Unit
The Handling Unit to be transferred, if applicable.

Item
Scan the item number. The item description and default unit of measure are displayed.

Serial Number
If you are performing this transaction using a single serial-in-inventory item, scan the serial number. Otherwise, leave this field blank.

From Location
If applicable, scan the current location of the item. This field is only displayed if the item is in a location-controlled warehouse.

Lot Number
If the item is lot-controlled, this field is displayed. Scan the lot number.

Inventory Date
If the item is date-controlled, this field is displayed. Scan the item inventory date.

On Hand Qty
The on-hand item quantity is displayed.

Free Qty
The item quantity available for transfer is displayed.

Qty To Transfer
Specify the quantity of items to transfer. The default unit of measure is displayed.

To Warehouse
Specify a warehouse to which to transfer the item.

To Location
Scan a location to which to transfer the item. This field is only displayed if the item is transferring to a location-controlled warehouse.

3 Select **Process**. If the item is not serial-controlled, the specified quantity is transferred. If the item is serial-controlled, or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed. On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

4. Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. If all needed serial and lot numbers have been scanned, the specified quantity is transferred. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Moving All Stock Points at a Location (Global Transfer)

Global Transfer is a transaction belonging to the Inventory Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inventory Transactions:

1. Select **Global Transfer**.
2. Specify or review this information:

   Warehouse
   Specify the warehouse number

   From Location
   Scan the location containing the inventory to be moved.

   To Location
   Scan a location to which to transfer the inventory.

   Note: Global Transfer only works within the same warehouse. There is no global transfer from one warehouse to another.

3. Select **Process**.

Viewing Inventory

You can use the Item Inquiry transaction to view all inventory for a specific item. You can use the Location Inquiry transaction to view all inventory in a specific location.

Viewing Inventory at a Stock Point (Location Inquiry)

Use the Location Inquiry to view a list of all items in a specific location.

Location Inquiry is a transaction belonging to the Inventory Sub-Menu on the Warehouse Mobility icon based and list based menus.

Note: If the item and warehouse has any project pegging, the relevant peg(s) must be specified.

On the Inventory:

1. Select **Location Inquiry**.
2. Specify a warehouse and location.
3. Select **Loc Details**. The description, quantity on hand, and allocated quantity are displayed.
4. To view more details, such as quantities categorized by lot or date, select a location and select **Item Details**.
5. Click **Peg Details**, to view the Peg Details form for the item. This button is displayed and enabled only if the item is pegged in the combined warehouse.

   The page displays these information:

   - Project
   - Element
   - Activity
   - Extension
   - Cost Component
   - Inventory Quantity associated with each peg item.

Viewing Inventory by Item (Item Inquiry)

Use the Item Inquiry transaction to view the status of items.

Item Inquiry is a transaction belonging to the Inventory Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inventory Sub-Menu:

1. Select **Inquiries > Item Inquiry**.
2. Scan or select an item number. This information about the item is displayed:

   - unit of measure
   - lot-control status
   - lot attribute group

- serial-control status
- attribute group
- type
- status

3 Optionally, in the **Whse** field, select a warehouse at which to view item quantities at specified locations. Leave this field blank to display the total quantities for all warehouses at your site.

4 Optionally, in the **Loc** field, select a location at which to view item quantities. Leave this field blank to view quantities at all locations in the selected warehouse.

5 Press **Enter**. The item number, quantity on hand, reserved quantity, and quantity in containers are displayed.

6 If you left the **Whse** and **Loc** fields blank, the total item quantities at all warehouses at your site are displayed. Optionally, to view quantities and location ranks at individual locations in a warehouse, select the warehouse and tap **Next**. If you selected a warehouse in the **Whse** field but left the **Loc** field blank, the item quantities and location rank for each location in the warehouse are displayed. If you select a warehouse and a location, the item quantities and location rank for the selected location are displayed.

7 Optionally, if the item is lot-controlled, select a location and tap **Next** to view the quantities for each lot number at that location.

Inbounding Capabilities

This section prodvides transaction processing:

Receiving Items (Receipts)

Use the Receipts transaction to receive items.

Receipts is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **Receipts**.

2 Specify or review this information:

Order Type
Select the type of order you are receiving.

Receipt Date
Specify the date that the item is being received. This field is only displayed if the **Allow Entry of Receipt Date** parameter is selected for this transaction.

Warehouse
Specify the receiving warehouse.

Packing Slip
Scan the packing slip.

Kanban ID
If applicable, scan the Kanban number. This field is only displayed if the **Allow Entry of Kanban ID** parameter is selected for this transaction.

Order Number
Optionally, scan the order number.

Item
Optionally, scan an item number to receive only lines containing that item.

Position
Optionally, specify a position number to receive only items in that position. This field is only available if you scanned an order number and did not scan a Kanban ID.

3. Select **Next**. Items to receive are displayed.
4. Select an item to receive. The order number, position, warehouse, item number, item description, and quantity to receive are displayed.
5. Specify or review this information:

Inspect?
If applicable, specify whether to inspect the items you are receiving. If the **Allow Entry of Inspection** parameter is not selected for this transaction, this field is display only.

Supplier Lot
If applicable, scan the supplier lot.

Certificate No
Optionally, to link a document to the lot number, specify a certificate number. This field is only displayed if the item is lot-controlled and the **User Input Lot Certificate Code** parameter is selected for this transaction.

Lot Number
If applicable, scan the lot number.

Pack Slip Quantity
Specify the quantity listed on the packing slip.

Received Quantity
If applicable, specify the quantity to receive. If the **User Inputs Received Quantity** parameter is not selected for this transaction, this field is display only.

Inventory Date
If applicable specify an inventory date. If the **Allow User Input of Inventory Date** parameter is not selected for this transaction, this field is display only.

Final Receipt?
If applicable, specify whether there are more items to receive for this order line on the current shipment. For example, if the open quantity is 100, and you are receiving a box of 50 on this shipment and a box of 50 on a future shipment, specify **Yes**. If you are receiving both boxes of 50

on this shipment, specify **No** when receiving the first box and **Yes** when receiving the second box. If the **User Input Final Receipt** parameter is not selected for this transaction, this field is display only.

Serial/Lot Entry?
To generate new serial numbers for the received items, select **No**. To manually scan existing serial numbers, select **Yes**.

Enter HU
This field is only displayed if you are using handling units. Specify **Yes**to assign a handling unit to the items you are receiving. To receive the items as loose inventory, specify **No**. See "Receiving Items Into Containers".

6 Select **Process**. If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

   a On the Serial/Lot Entry screen, specify or review this information:

   Item number
   The item number and description are displayed.

   Quantity remaining
   The quantity that needs to be assigned serial or lot numbers is displayed.

   Generate Serials?
   To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

   All Serials?
   Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

   Lot Number
   If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

   Serial Number
   Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

   Quantity
   Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

7 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

8 If you are asked to cross dock the items, and you wish to cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.

9 If prompted, specify a putaway location in the **Actual Location** field.

10 If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To print labels using the Label Printing screen, see "Printing Labels" on page 108.

Receiving ASN Items (ASN Receipt)

Use the ASN Receipt transaction to receive items using an advanced shipment notice. The advanced shipment notice must be in the**Open** status to perform the receipt.

ASN Receipt is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **ASN Receipt**.

2 In the**ID** field, scan the ASN number, packing list number, or packing slip number.

3 Specify or review this information:

ID
The number you scanned for the ID is displayed.

ASN
The shipment number is displayed.

No of Items
The number of lines to receive is displayed.

No of Lots
The number of lots to receive is displayed.

Action
To receive all lines and quantities as they are listed on the packing list, specify **A** and press **Enter**. Ensure that the items and quantities received match those listed on the packing list before performing this action.

To receive one line at a time, press **X**. A list of lines to receive is displayed.

4 Select a line to receive.

5 Specify or review this information:

Inspect?
If applicable, specify whether to inspect the items you are receiving. If the **Allow Entry of Inspection** parameter is not selected for this transaction, this field is display only.

Supplier Lot
If applicable, scan the supplier lot number.

Certificate Number
Optionally, to link a document to a lot number, specify a certificate number. This field is only displayed if the item is lot-controlled and the **User Input Lot Certificate Code** parameter is selected for this transaction.

Lot Number
If applicable, scan the lot number.

Pack Slip Quantity
Specify the quantity listed on the packing slip.

Received Quantity
Specify the quantity you are receiving.

Inventory Date
If applicable, specify the inventory date.

Final Receipt?
If applicable, specify whether there are more items to receive for this order line on the current shipment. For example, if the open quantity is 100, and you are receiving a box of 50 on this shipment and a box of 50 on a future shipment, specify **Yes**. If you are receiving both boxes of 50 on this shipment, specify **No** when receiving the first box and **Yes** when receiving the second box. If the **Allow User to Enter Final Receipt** parameter is not selected for this transaction, this field is display only.

Serial/Lot Entry?
To generate new serial numbers for the received items, select **No**. To manually scan existing serial numbers, select **Yes**.

6. Select **Process**. If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.
   a. On the Serial/Lot Entry screen, specify or review this information:

      Item number
      The item number and description are displayed.

      Quantity remaining
      The quantity that needs to be assigned serial or lot numbers is displayed.

      Generate Serials?
      To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

      All Serials?
      Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

      Lot Number
      If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

b. Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

7. If you are asked to cross dock the items, and you wish to cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.
8. If prompted, specify a putaway location in the **Actual Location** field.
9. If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To print labels using the Label Printing screen, see "Printing Labels" on page 108.

Receiving Customer Returns without an RMA (Customer Returns)

Use the Customer Returns transaction to receive items that customers have returned without an RMA. To receive customer return items that have an RMA, see "Receiving Items" on page 38.

Customer Returns is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1. Select **Customer Returns**.
2. Specify this information:

   Customer
   Specify the number of the customer who is returning items.

   New Order?
   To create new sales order for the return, specify **Yes**. To add the return to an existing order, specify **No**.

   Order Number
   Specify the order number to which to add the return. This field is only displayed if you are adding the return to an existing order.

3. Select **Next**.
4. Specify or review this information:

   Order Number
   If you are adding the return to an existing order, the order number is displayed. If you are creating a new order, this field is blank.

Item Number
Scan the item number.

Lot Number
If applicable, scan the lot number.

Quantity
Specify the quantity to return.

Warehouse
Specify the receiving warehouse.

Location
If applicable, specify the location to which to receive the items.

Generate Handling Unit
If applicable, specify whether to create a handling unit for the returned items. This field is only enabled if your organization is using handling units, and the item is handling unit-controlled.

Handling Unit
Specify the handling unit into which to receive the returned items.

5. Select **Process**. If the item is serial-controlled or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

   On the Serial/Lot Entry screen, specify or review this information:

   Item number
   The item number and description are displayed.

   Warehouse
   The warehouse is displayed.

   Quantity remaining
   The quantity that needs to be assigned serial or lot numbers is displayed.

   Generate Serials?
   To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

   All Serials?
   Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

   Lot Number
   If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

   Serial Number
   Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

6 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.
7 If prompted, specify a putaway location in the **Actual Location** field.
8 If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To print labels using the Label Printing screen, see "Printing Labels" on page 108.

Receiving Items Into Consignment Warehouses (Consignment Receipt)

You can use the Consignment Receipt transaction to receive items that are not part of a purchase order into a consignment warehouse. To receive items on a purchase order, see "Receiving Items" on page 38.

Consignment Receipt is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **Consignment Receipt**.
2 Specify or review this information:

Warehouse
Specify the consignment warehouse.

Purchase Order
Specify the purchase order to which to add the received items. If a blanket purchase order is assigned to the specified warehouse, this field is read only.

Packing Slip
Scan the packing slip.

Item Number
Scan the item number.

Unit of Measure
The unit of measure is displayed.

Lot Number
If applicable, scan the lot number. Optionally, leave blank to generate a lot number. This field is only displayed if the item is lot-controlled.

Quantity
Specify the quantity of items to receive.

Location
Specify the location to which to receive the items. This field is only displayed if the warehouse is location-controlled.

3 Select **Process**.
4 If applicable, you are prompted to put away the items. This information is displayed on the Putaway screen:

- order number and position
- warehouse
- item number and description
- serial number, if applicable
- lot number, if applicable
- quantity to be put away
- recommended put away location

In the **Actual Location** field, specify a put away location.

5 If applicable, print labels. If the this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. See "Printing Labels" on page 108 for information about printing labels using the Label Printing screen.

Putting Away Items

Items can be put away using a receipt number, order number, or storage list. If the **Putaway by Receipt No** or **Putaway by Storage List** parameters are selected for this transaction, you will put away items using those methods. If those parameters are cleared, you will put away items using the order number.

See "Putting Away Items Using a Receipt Number" on page 46.

See "Putting Away Items Using an Order Number" on page 47.

See "Putting Away Items Using a Storage List" on page 48.

Putting Away Items Using a Receipt Number

Putaway is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **Putaway**.
2 Scan the receipt.
3 Select **Process**.
4 Select a line to putaway.

Note: If you are putting away a container linked to a handling unit, you are not prompted to select a line to put away.

5 Specify this information:

Actual Location
Specify a put away location.

Quantity
Specify the quantity to put away.

Note: If you are using handling units, you can specify **Yes** in the **Enter HU** field to assign a handling unit to the items you are receiving. To receive the items as loose inventory, specify **No**. See "Assigning Handling Units to Received Items" for more information.

6 Select **Process**.

7 If applicable, you are asked to cross dock the items. To cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.

Putting Away Items Using an Order Number

Putaway is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **Putaway**.

2 Specify this information:

Order Type
Specify the order type.

Order Number
Scan the order number.

Item Number
Optionally to show only lines containing a certain item, scan the item number. Leave blank to show all lines awaiting put away.

3 Select **Process**.

4 Select a line to put away.

Note: If you are putting away a container linked to a handling unit, you are not prompted to select a line to put away.

5 Specify this information:

Actual Location
Specify a put away location.

Quantity
Specify the quantity to put away.

Note: If you are using handling units, you can specify **Yes** in the **Enter HU** field to assign a handling unit to the items you are receiving. To receive the items as loose inventory, specify **No**. See "Assigning Handling Units to Received Items" for more information.

6 Select **Process**.
7 If applicable, you are asked to cross dock the items. To cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.

Putting Away Items Using a Storage List

Putaway is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **Putaway**.
2 Specify this information:

Warehouse
Specify a warehouse into which to receive the items.

Run Number
Scan an inbound run number.

Mission From and Mission To
Specify a range of mission numbers to process. The mission numbers specified in these fields, and all mission numbers in between, are included in the range.

Item Number
Scan the item number.

3 Select **Process**.
4 Select a line to put away.

Note: If you are putting away a container linked to a handling unit, you are not prompted to select a line to put away.

5 Specify this information:

Actual Location
Specify a put away location.

Quantity
Specify the quantity to put away.

Note: If you are using handling units, you can specify **Yes** in the **Enter HU** field to assign a handling unit to the items you are receiving. To receive the items as loose inventory, specify **No**. See "Receiving Items into Containers" for more information.

6 Select **Process**.

7 If you are asked to cross dock the items, and you wish to cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.

Approving and Rejecting Inspected Items (Approvals)

Approvals is a transaction belonging to the Inbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Inbound Transactions Sub-Menu:

1 Select **Approvals**.
2 Specify this information:

Order Type
Specify an order type.

Warehouse
Specify the warehouse in which the item will be inspected.

Order Number
Scan the order number.

Item Number
Optionally, to show only lines containing a certain item, scan the item number. Leave blank to show all lines awaiting inspection.

3 Press **Enter**. The list of lines awaiting inspection is displayed.
4 Scan an item to inspect.
5 If you are inspecting a parent handling unit, you must either approve or reject the entire handling unit structure, including its children. Specify this information:

Approved Quantity
Specify the quantity of items to approve. Include destroyed items in this quantity, unless they failed inspection, and you are rejecting them.

Quantity Rejected
Specify the quantity of items to reject.

Reason Code
If you reject any items, specify a reason code for the rejections.

Quantity Destroyed
Specify the quantity of items that were destroyed. Only approved items can be destroyed, so the destroyed quantity must be equal to or less than the approved quantity.

Reason Code
If you destroy any items, specify a reason code for the destruction. This field is only displayed if a quantity above zero is specified in the **Quantity Destroyed** field.

Scrap Quantity
If applicable, specify the quantity of rejected items to scrap. Any rejected items that are not scrapped will be quarantined. This field is only displayed if you are rejecting items and if the item is designated for scrap, quarantine, or both in ERP LN.

Reason Code
If applicable, specify a reason code for the items scrapped. This field is only displayed if a quantity above zero is specified in the **Scrap Quantity** field.

6. Select **Process**. If the item is serialized, the Serial Entry screen is displayed. If you scanned the serial number as the reference ID, or the item is part of a handling unit, you do not need to scan serial numbers, so the Serial Entry screen will not display.
   a. If the Serial Entry screen is displayed, scan each serial number.
   b. Specify or review this information:

      Action
      Specify whether the scanned serial number is approved (**A**), rejected (**R**), or destroyed (**D**).

      Quantity Remaining
      The number of serial number you have scanned is displayed. Optionally, press **X** to view serial numbers you have scanned. If you scan a serial number incorrectly, you can press **Y** to delete all scanned serial numbers within the current transaction. The **Quantity Remaining** field resets, and you can then scan the correct serial numbers.

7. If you are asked to cross dock the items, and you wish to cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.
8. If prompted, specify a putaway location in the **Actual Location** field.
9. If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To print labels using the Label Printing screen, see "Printing Labels" on page 108.

Cross Docking Items (Cross-Docking)

For all material inbound transactions, Factory Track supports cross docking. This feature is based on the cross-docking parameter configuration, allowing the system to determine open requirements for the item and present a consolidated list to the user so that the user can perform the next action instead of just putting it back in inventory. This works like a dynamic cross referencing for the item at the time of receipt.

1. When prompted to cross dock, specify **Yes**.
2. Select **Process**.
3. If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. See "Printing Labels" on page 108 for information about printing labels using the Label Printing screen.

   A list of outbound orders available for cross docking is displayed.
4. Select an order to which to cross dock. This information is displayed:

- Order type
- Order number
- Order position
- Item number
- Quantity needed for the order
- Quantity available for cross docking

5 In the **XDockQty** field, specify the number of items to cross dock to the specified order, and specify the unit of measure. This number cannot exceed the quantity needed nor the quantity available.

6 In the **Loc** field, specify a temporary location status for the items before they are delivered to the staging location.

7 Select **Process**. The items are cross docked to the order. If the quantity needed for the orders has been filled, the order is removed from the cross docking list.

8 If there is still an available quantity, the list of outbound orders available for cross docking is displayed. You can select another order to cross dock the remaining item quantity. Optionally, press **Esc** to exit the cross docking transaction. You can put away the remaining items either using the standalone Putaway transaction or from within the current transaction, depending upon the configuration of your system.

Outbounding Capabilities

This section prodvides transaction processing:

Picking Items (Picking)

You can pick items by order, mission, or run.

See "Picking Items by Order" on page 51.

See "Picking Items by Mission" on page 53.

See "Picking Items by Run" on page 55.

Picking Items by Order

Picking is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1 Select **Picking**.

2 In the **Pick By** field, select **Order**.

3 Specify this information:

Order Type
Select the order type.

Order
Scan the order number.

Stage Location
Specify the location status for the item during the time between when the item is picked and when it is delivered.

Cart Location
Scan the cart location.

New Run Number
The run to which picked items are assigned if they are not on the pick list is displayed.

4 Select **Next**.

5 Select an item to pick.

6 If applicable, specify this stock point information:

Item Number
Scan the item number. You are only required to scan the item number if the **Scan Item Number** parameter is selected for this transaction.

Handling Unit
Scan the item number. You are only required to scan the item number if the **Scan Handling Unit** parameter is selected for this transaction.

Location
Scan the item number. You are only required to scan the item number if the **Scan Location** parameter is selected for this transaction.

Lot Number
Scan the item number. You are only required to scan the item number if the **Scan Lot Number** parameter is selected for this transaction.

Inventory Date
Scan the item number. You are only required to scan the item number if the **Scan Inventory Date** parameter is selected for this transaction.

7 In the **Quantity** field, specify the quantity of items to pick.

8 If you are picking for a Kanban transfer order, specify the Kanban replenishment location in the **To Location** field.

9 Select **Process**.

If you are using handling units and are picking a quantity of items from a container that is less than the total quantity in that container, the Handling Unit form is displayed. In the **Add to Another HU** field, specify whether to add the items to an existing handling unit. If you select **Yes**, scan the handling unit number in the **Handling Unit?** field.

If the quantity you specified is less than the amount on the pick list, you are asked whether you are conducting a partial pick. If you will return to pick more items from this stock point, specify **Yes**. If you will not pick more items from this stock point, specify **No**. You may also be asked whether there is lost material. If items are missing, specify **Yes**. The missing items are transferred to a hold location. If items are not missing, specify **No**.

If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

10 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Picking Items by Mission

Picking is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1 Select **Picking**.
2 In the **Pick By** field, select **Mission**.
3 Specify this information:

Run Number
Scan the run number for this request

Mission From and Mission To
Optionally, specify a range of mission numbers to only display items for those missions. The mission numbers specified in these fields, and all position numbers in between, are included in the range.

Picking Seq From and Picking Seq To
Optionally, specify a range of sequences to only display items for those sequences. The sequence numbers specified in these fields, and all position numbers in between, are included in the range.

Stage Location
Specify the location status for the item during the time between when the item is picked and when it is delivered.

Cart Location
Scan the cart location.

New Run Number
The run to which picked items are assigned if they are not on the pick list is displayed.

4. Select **Next**. A list of items to pick is displayed.
5. Select an item.
6. If applicable, specify this stock point information:

   Item Number
   Scan the item number. You are only required to scan the item number if the **Scan Item Number** parameter is selected for this transaction.

   Handling Unit
   Scan the item number. You are only required to scan the item number if the **Scan Handling Unit** parameter is selected for this transaction.

   Location
   Scan the item number. You are only required to scan the item number if the **Scan Location** parameter is selected for this transaction.

   Lot Number
   Scan the item number. You are only required to scan the item number if the **Scan Lot Number** parameter is selected for this transaction.

   Inventory Date
   Scan the item number. You are only required to scan the item number if the **Scan Inventory Date** parameter is selected for this transaction.

7. In the **Quantity** field, specify the quantity of items to pick.
8. If applicable, specify the Kanban replenishment location in the **To Location** field. You are only required to specify this location if you are picking for a Kanban transfer order.
9. Select **Process**.

   If you are using handling units and are picking a quantity of items from a container that is less than the total quantity in that container, the Handling Unit form is displayed. In the **Add to Another HU** field, specify whether to add the items to an existing handling unit. If you select **Yes**, scan the handling unit number in the **Handling Unit?** field.

If the quantity you specified is less than the amount on the pick list, you are asked whether you are conducting a partial pick. If you will return to pick more items from this stock point, specify **Yes**. If you will not pick more items from this stock point, specify No. You may also be asked whether there is lost material. If items are missing, specify **Yes**. The missing items are transferred to a hold location. If items are not missing, specify **No**.

If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

10 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Picking Items by Run

Picking is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1 Select **Picking**.

2 In the **Pick By** field, select **Run**.

3 Specify this information:

Run Number
Scan the run number for this request

Stage Location
Specify the location status for the item during the time between when the item is picked and when it is delivered.

Cart Location
Scan the cart location.

New Run Number
The run to which picked items are assigned if they are not on the pick list is displayed.

4 Select **Next**. A list of items to pick is displayed.

5 Select an item.

6 If applicable, specify this stock point information:

Item Number
Scan the item number. You are only required to scan the item number if the **Scan Item Number** parameter is selected for this transaction.

Handling Unit
Scan the item number. You are only required to scan the item number if the **Scan Handling Unit** parameter is selected for this transaction.

Location
Scan the item number. You are only required to scan the item number if the **Scan Location** parameter is selected for this transaction.

Lot Number
Scan the item number. You are only required to scan the item number if the **Scan Lot Number** parameter is selected for this transaction.

Inventory Date
Scan the item number. You are only required to scan the item number if the **Scan Inventory Date** parameter is selected for this transaction.

7 In the **Quantity** field, specify the quantity of items to pick.

8 If applicable, specify the Kanban replenishment location in the **To Location** field. You are only required to specify this location if you are picking for a Kanban transfer order.

9 Select **Process**.

If you are using handling units and are picking a quantity of items from a container that is less than the total quantity in that container, the Handling Unit form is displayed. In the **Add to Another HU** field, specify whether to add the items to an existing handling unit. If you select **Yes**, scan the handling unit number in the **Handling Unit?** field.

If the quantity you specified is less than the amount on the pick list, you are asked whether you are conducting a partial pick. If you will return to pick more items from this stock point, specify **Yes**. If you will not pick more items from this stock point, specify **No**. You may also be asked whether there is lost material. If items are missing, specify **Yes**. The missing items are transferred to a hold location. If items are not missing, specify **No**.

If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

10 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Picking Items for Orders Without a Pick List (Allocate Release)

Allocate Release is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1 Select **Allocate Release**.

2 Specify this information:

Warehouse
Specify a warehouse.

Order Type
Specify an order type.

Zone
Optionally, specify a zone to only display items located in that zone. This field is only available if the **Enter Zone** parameter is selected for this transaction.

From Order and To Order
In the **From Order** and **To Order** fields, specify an order number to only display items on that order. Optionally, specify a different order number in the **To Order** field to specify a range of orders, including both specified order numbers and all order numbers in between.

Parent HU
This field is enabled, if the parent parameter pick_and_pack is selected in the transaction set maintenance form. The related parent HU for the entered Projected Shipment must be used.

Handling Unit
If the match_hu parameter is selected in the transaction set maintenance form, user can specify the HU without any validation process.

Note:

- If the parameter is not selected, the contents of the HU is validated for the Projected Shipment/Order.
- If the Handling unit is not specified, the standard LN process is used.

Shipment HU
This field is enabled only if the match_hu parameter is selected in the transaction set maintenance form. You can specify the value for this field in the following scenarios:

- The specified value must match with the contents of the Handing Unit used and is required to be the part of the Projected Shipment.
- This field is optional, if no parent parameter exists for the Shipment.
- The application validates for one time use of both the **Shipment HU** and the **Handling Unit** fields.

Work Center
Specify the work center. This field is only available if you are picking items for a production order and the **Pick By Work Center** parameter is selected for this transaction.

Cart Location
Scan the cart location.

HUs Scanned
This field is enabled if the Scan Handling Unit parameter is selected in the transactions set maintenance form.

3. Select **Process**. The pick list is displayed.
4. Select an order line to pick. A list of stock points containing the needed item are displayed. The available quantity at each stock point is also displayed.

5 Select a stock point from which to pick. This information is displayed:

- order number
- order position
- needed quantity
- item number and description
- location
- lot number, if applicable
- inventory date, if applicable

6 In the **Quantity** field, specify the quantity to receive.

7 Select **Process**.

If you are using handling units and are picking a quantity of items from a container that is less than the total quantity in that container, the Handling Unit form is displayed. In the **Add to Another HU** field, specify whether to add the items to an existing handling unit. If you select **Yes**, scan the handling unit number in the **Handling Unit?** field.

If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

b Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Note: Items must be picked from pick or bulk locations. If items have to be returned to the supplier or a rework is required, the items must be picked from the quarantine locations.

Releasing Outbound Order Lines and Confirming Pick Lists

Use the Release Outbound transaction to release order lines for shipment or to confirm pick lists. You can only release order lines that have been picked and packed; the transaction will verify the status of order lines before releasing them for shipment.

Release Outbound is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1. Select **Release Outbound**.
2. Specify this information:

   Release By
   Select whether to release lines by **Order Number**, **Run Number**, or **Mission Number**.

   Run Number
   Specify a run number. This field is only displayed if you are releasing lines by run number or by mission number.

   Mission
   Specify a mission number. This field is only displayed if you are releasing lines by mission number.

   Order Type
   Select an order type. This field is only displayed if you are releasing lines by order number.

   Order Number
   Specify an order number. This field is only displayed if you are releasing lines by order number.

   Position From and Position To
   Specify a range of position numbers to release on the order line. The position numbers specified in these fields, and all position numbers in between, are included in the range. This field is only displayed if you are releasing lines or confirming pick lists by order number.

3. Select **Process**. The specified outbound order lines are released, or the items on those lines are marked as picked in ERP LN.

Managing Shipments (Shipment Handling)

You can perform one or more of these actions in a single Shipment Handling transaction:

- confirm shipments
- freeze shipments
- unfreeze shipments
- print packing slips
- print bills of lading

Shipment Handling is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1 Select **Shipment Handling**.
2 Specify or review this information:

   Order Type
   Select an order type.

   Order Number
   Optionally, to specify a shipment using its order number, scan an order number.

   Shipment
   Optionally, to specify a shipment using its shipment number, scan a shipment number. If you scanned an order number, the associated shipment is displayed and this field is read only.

   Load
   The load number associated with the shipment is displayed.

   Freeze?
   Specify whether to freeze the shipment. If there are multiple shipments on the associated load, you are asked whether to freeze all shipments on the load. This field is only available if the shipment is not frozen and the **Freeze Allowed?** parameter is selected for this transaction.

   Unfreeze?
   Specify whether to unfreeze the shipment. If there are multiple shipments on the associated load, you are asked whether to unfreeze all shipments on the load. This field is only available if the shipment is not frozen and the **Unfreeze Allowed?** parameter is selected for this transaction.

   Confirm?
   Specify whether to confirm the shipment. If you confirm the shipment, and there are multiple shipments on the associated load, all shipments on the load will be confirmed. This field is only available if the **Confirm Allowed?** parameter is selected for this transaction.

   Print Packing Slip?
   Specify whether to print a packing slip for the shipment. If there are multiple shipments on the associated load, you are asked whether to print packing slips for all shipments on the load. This field is only available if the **Print Packing Slip?** parameter is selected for this transaction.

   Print BOL?
   Specify whether to print a bill of lading for the shipment. If there are multiple shipments on the associated load, you are asked whether to print bills of lading for all shipments on the load. This field is only available if the **Print BOL?** parameter is selected for this transaction.

3 Select **Process**.

Returning Items from Staging (Return from Staging)

Use the Return from Staging transaction to return items from the staging area back into inventory when a shipment has been canceled or modified. You can only return items from staging that have previously been released by a Picking or Release Outbound transaction.

Return from Staging is a transaction belonging to the Outbound Transactions Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Outbound Transactions Sub-Menu:

1 Select **Return from Staging**.
2 Specify or review this information:

   Warehouse
   Specify a warehouse from which items are being returned.

   Stage Location
   Specify a stage location from which items are being returned.

   Handling Unit
   If applicable, scan the handling unit to return. This field is only displayed if the **Allow Handling Unit Input** parameter is selected for this transaction.

   Item Number
   If applicable, scan the item number to return. If you are returning a handling unit, this field is read only.

   Serial Number
   If you are performing this transaction using a single serial-in-inventory time, scan the serial number. Otherwise, leave this field blank. If you are returning a handling unit, this field is read only. This field is only displayed if the item is serial-in-inventory controlled and the **Allow Serial Number Input** parameter is selected for this transaction.

   Lot Number
   If applicable, scan the lot number. If you are returning a handling unit, this field is read only. This field is only displayed if the item is lot-in-inventory controlled.

   Inventory Date
   If applicable, specify the inventory date. If you are returning a handling unit, this field is read only. This field is only displayed if the item is date-controlled.

   Free Quantity
   The staged quantity that is available to be returned is displayed.

   Quantity
   Specify the quantity to return to inventory. If you are returning a handling unit, this field is not displayed.

   To Location
   Specify the location to which to return the items.

3 Select **Process**.
4 If you are using handling units and are returning a quantity of items from a container that is less than the total quantity, the Handling Unit form is displayed. In the **Add to Another HU** field, specify

whether to add the items to an existing handling unit. If you select **Yes**, scan the handling unit number in the **Handling Unit?** field.

5 If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed. On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

6 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Production Capabilities

This section prodvides transaction processing:

Reporting Completed Operations

Report Operation is a transaction belonging to the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Production Sub-Menu:

1 Select **Report Operation**.
2 Optionally, in the **Serial Number** field, scan the serial number that is being reported.
3 Specify or review this information:

   Order Number
   Scan the order number. If you scanned a serial number on the previous screen, the associated order number is displayed and this field is read only.

   Item Number
   The item number is displayed.

   Operation Number
   Specify an operation number for which to report completed quantities.

   Serial Number
   Optionally, scan the serial number that is being reported. If you scanned a serial number on the previous screen, that serial number is displayed and this field is read only. This field is only available if the item is serial-controlled.

   Lot Number
   If applicable, scan the lot number. This field is only available if the item is lot-controlled, this is the last operation on the order, and you are reporting the order as complete.

   Open Quantity
   The remaining quantity to be completed for this operation is displayed.

   Quantity Complete
   Specify the quantity completed for this operation.

   Quantity Rejected
   If applicable, specify the quantity you are rejecting.

   Cumulative Rejected
   The cumulative quantity that has been rejected for this operation is displayed.

   Reject Code
   If applicable, specify the reason you are rejecting quantities.

   Complete?
   If you are not done working the current operation, select **No**. If you are done working on this operation and want to report it as completed, specify **Yes**. If you specify **Yes**, you will not be able to complete any more quantities for this operation. This field is only available if the **User to Input the Complete Flag** parameter is selected for this transaction.

4 Select **Process**.
5 Optionally, if this is the last operation on the order and the item uses handling units, specify this information:

Generate Handling Unit?
Specify whether to assign a handling unit to the reported quantity.

Handling Unit?
Scan the handling unit you are assigning to the reported quantity. Optionally, leave blank to generate a new handling unit. This field is only available is you are assigning a handling unit to the reported quantity.

6 If you are generating a new handling unit, print labels for the new handling unit. If this transaction is configured to print handling unit labels, labels are automatically printed or the Handling Unit Labels screen is opened. See "Printing Labels" on page 108 for information about printing labels for handling units.
7 If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To print labels using the Label Printing screen, see "Printing Labels" on page 108.

Reporting Completed Production (Report Production)

Report Production is a transaction belonging to the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Production Sub-Menu:

1 Select **Report Production**.
2 In the **Order Number** field, scan the production order. If you scanned a serial number as a reference ID for this transaction, the production order number is automatically specified.
3 Specify this information:

Complete
Specify the quantity produced. If the item is serial-controlled or lot-controlled, but not lot-in-inventory controlled, this field is not displayed.

Rejected
If applicable, specify the quantity rejected.

Reject Code
Specify the reason for the rejections. This field is only display if you are rejecting items.

Shift
Specify the shift during which the items were produced.

Complete
If all items have been produced for this order, specify **Yes**. If there are still more items to complete, specify **No**. This field is only displayed if the **User Input Complete Flag** parameter is selected for this transaction.

Location
If applicable, specify a put away location for the completed items. This field is only displayed if the item is location-controlled and the **Putaway** parameter is selected for this transaction.

4 Select **Process**. If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed. On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

5 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

6 If you are asked to cross dock the items, and you wish to cross dock, see "Cross Docking Items" on page 50. To skip cross docking, specify **No**.

7 Optionally, if this is the last operation on the order and the item uses handling units, specify this information:

Generate Handling Unit?
Specify whether to assign a handling unit to the reported quantity.

Handling Unit?

8 If you are generating a new handling unit, print labels for the new handling unit. If this transaction is configured to print handling unit labels, labels are automatically printed or the Create Handling Unit screen is opened. See "Printing Labels" on page 108 for information about printing labels for handling units.

9 If applicable, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To print labels using the Label Printing screen, see "Printing Labels" on page 108.

Linking Component Items to End Items (As-Built Maintenance)

Use the As-Built transaction to link serial-controlled or lot-controlled component items to serialized end items.

As-Built Maintenance is a transaction belonging to the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Production Sub-Menu:

1 Select **As-Built**.
2 Specify this information:

   ItemNumber
   Scan the number of the item being built.

   Serial Number
   Scan the serial number of the item being built.

   Order Number
   The order number associated with the scanned serial number is displayed.

   Component
   Scan the component item number.

   Serial Number
   If the component item is serial-controlled, scan the component serial number.

   Lot Number
   If the component item is lot-controlled, scan the component lot number.

   Quantity
   Specify the component quantity. If the component item is serial-controlled, a quantity of one is automatically specified.

3 Select **Process**. The components are linked to the end item in ERP LN.

Returning Items from Production (Return Material)

Use the Return Material transaction to return items to inventory that were previously issued to a production order.

Return Material is a transaction belonging to the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Production Sub-Menu:

1 Select **Return Material**.
2 Specify or review this information:

   Order Number
   Scan the number of the production order from which the material is being returned.

   Item Number
   Scan the item number to return. The item description is displayed.

   Position
   If applicable, specify the position of the item on the order. The position may be specified by default.

   Warehouse
   Specify the warehouse to which the items are being returned.

   Lot Number
   If applicable, scan the lot number.

   Quantity
   Specify the quantity to return to inventory.

   Location
   Specify the location to which to return the items.

   Generate HU?
   Specify whether to assign a handling unit to the returned items. This field is only displayed if the **Allow Handling Unit Input** parameter is selected for this transaction.

   Handling Unit
   Scan the handling unit to which to assign the returned items. Optionally, leave blank to generate a new handling unit. This field is only displayed if you specified **Yes** in the **Generate HU?** field.

3 Select **Process**.
4 If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed. On the Serial/Lot Entry screen, specify or review this information:

   Item number
   The item number and description are displayed.

   Quantity remaining
   The quantity that needs to be assigned serial or lot numbers is displayed.

   Generate Serials?
   To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

   All Serials?
   Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial

number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

5 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Issuing Unplanned Material (Unplanned Material Issue)

Unplanned Material Issue is a transaction belonging to the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Production Sub-Menu:

1 Select **Unplanned Material Issue**.
2 Specify or review this information:

Order Number
Scan a production order number.

Operation Number
Specify the operation for which you are issuing material.

Item Number
Scan the number of the item you are issuing. The item description is displayed.

Warehouse
Specify the warehouse.

Handling Unit
If applicable, scan the handling unit assigned to the items you are issuing.

Location
Specify the location from which the item is being issued.

Lot Number
If applicable, scan the lot number.

Inventory Date
If applicable, scan the inventory date.

Quantity Available
The quantity available for allocation is displayed.

Quantity
Specify the quantity to issue.

3 Select **Process**.

If you are using handling units and are issuing a quantity of items from a container that is less than the total quantity in that container, the Handling Unit form is displayed. In the **Add to Another HU** field, specify whether to add the items to an existing handling unit. If you select **Yes**, scan the handling unit number in the **Handling Unit?** field.

If you need to manually scan serial numbers, or the item needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

b Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

4 If prompted, print labels. If this transaction is configured to print labels, labels are automatically printed or the Label Printing screen is opened. To use the Label Printing screen, see "Printing Labels" on page 108.

Disposition of Rejects reported against Production Operations

Use the Report Scrap/Quarantine transaction to dispose of previously-rejected items against a production order operation.

The Report Scrap/Quarantine transaction is included in the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Production Sub-Menu:

1 Select **Report Scrap/Quarantine**.
2 Specify this information:

Order Number
Scan the order number.

Operation Number
The operation number against which the disposition must take place.

Quantity Rejected
The rejected quantity is displayed that can be disposed. If there is no quantity available, the user is not allowed to access this transaction for the operation.

UEF
The UEF Code of the item is displayed

Scrap Quantity
The quantity to be scrapped is entered in this field.

Note: This field is only enabled if the item is able to scrap (identified by the setting of the item on the item warehousing form in LN).

Quarantine Quantity
The quantity that must be moved to a quarantine location is provided in this field.

Note:

- This field is only enabled if the item is flagged as able to be quarantined (identified by the setting of the item on the item warehousing form in LN).
- The sum of the quantity scrapped and quarantined must not exceed the quantity available for disposition for this operation.

Quarantine Warehouse
This field must be provided if a quarantine quantity is entered.

Quarantine Location
This field must be provided, if a quarantine quantity is entered and the quarantine warehouse is location-controlled.

NCM Report
The NCM (Non-Conformance) Report to be printed if quarantining is to take place. This field is only enabled if a quarantine quantity is entered

3 Select **Process** to start the disposition of the quantities.

Reporting Quantities against Repetitive Orders (Report Repetitive)

The Report Repetitive transaction is included in the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

To report quantities on the Production Sub-Menu:

1 Select **Report Repetitive**.
2 Scan or Select **Work Cell**.
3 Select the Shift if the default value is not used.
4 Scan or Select **Item for reporting**.
5 Select **Next**.
6 Specify this information:

Lot Number
If the item is lot-controlled, specify or scan the lot number that is reported.

Transfer Quantity
This field displays the normal transfer quantity for the item.

Reported Quantity
The quantity reported to date against this production schedule.

Quantity
The quantity to be reported in this transaction.

Rejected
The quantity to be rejected in this transaction.

7 Select **Process**.
8 If the item is serial-controlled, specify the serial number(s) that is reported on the additional screen.
9 If applicable, Print labels. If this transaction is configured to print labels, labels are automatically printed or the Label printing session is displayed. To print labels using the Label printing screen, see "Printing Labels".

Reporting Time against Repetitive Orders (Repetitive Time)

The Repetitive Time transaction is included in the Production Sub-Menu on the Warehouse Mobility icon based and list based menus.

To record time, on the Production Sub-Menu:

1 Select **Repetitive Time**.
2 Scan or Select **Work Cell**.
3 Select the Shift if the default value is not used.
4 Select one of these options:
   - Setup: if starting the setup process for this shift.
   - Run: if starting the run time process for this shift.
   - Stop: if stopping the previous mode.
   - Down: if machine down time is required.
5 Select **Process**.

Kanban Capabilities

This section prodvides transaction processing:

Creating Kanbans (Kanban Create)

Kanban Create is a transaction belonging to the Kanban Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Kanban Sub-Menu:

1 Select **Kanban Create**.
2 Specify this information:

   Kanban ID
   If you are using pre-defined Kanban numbers, scan the Kanban number. If you are not using pre-defined Kanban numbers, this field is not displayed, and a Kanban number is automatically generated.

   Kanban Location
   Scan a location.

   Item Number
   Scan an item number.

   Number of Kanbans
   The number of Kanbans on the current Kanban loop is displayed.

Temporary?
Specify whether you are creating a temporary Kanban. If you are creating a temporary Kanban, you must specify a replenishment limit, an expiry date, or both.

Number of Loops
This field is only available for temporary Kanbans. Optionally, specify how many times this Kanban can be replenished before it is canceled.

Expiry Date
This field is only available for temporary Kanbans. Optionally, specify the date that the Kanban will be canceled.

Print Labels
Specify whether or not to print labels for the Kanban.

Printer
Select a printer. This field is only available if you selected **Yes** in the **Print Labels** field.

Number of Labels
Specify how many labels to print. This field is only available if you selected **Yes** in the **Print Labels** field.

3. Select **Process**.

Requesting Kanban Replenishments (Kanban Request)

Use the Kanban Request transaction to request the replenishment of a Kanban when it has been depleted.

Kanban Request is a transaction belonging to the Kanban Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Kanban Sub-Menu:

1. Select **Kanban Request**.
2. In the **Kanban ID** field, scan the Kanban number. The Kanban location, item number, and item description are displayed.
3. In the **Complete?** field, specify whether you have scanned the correct Kanban for replacement.
   a. If you select **Yes**, a request order is created in ERP LN, and the corresponding number is displayed. The Kanban status is changed to, depending upon your organization's ERP LN settings, **Requested** or **Approved**.
   b. If you select **No**, scan the correct Kanban number in the **Kanban ID** field.
4. Select **Process**.

Delivering Kanban Items (Kanban Delivery)

Use the Kanban Request transaction to deliver items to a Kanban location that have been received to fill a Kanban request. You can only deliver Kanbans that have the **Received** status.

Kanban Delivery is a transaction belonging to the Kanban Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Kanban Sub-Menu:

1 Select **Kanban Delivery**.
2 In the **Kanban ID** field, scan the Kanban number. This information is displayed:
   - warehouse from which the items will be delivered
   - location from which the items will be delivered
   - item number
   - item description
   - item quantity and unit of measure
3 Specify this information:

   To Warehouse
   If applicable, specify the warehouse to which the items will be delivered. If the **To Warehouse** parameter is cleared for this transaction, this field is read only.

   To Location
   Scan the location to which the items will be delivered. If the **To Location** parameter is cleared for this transaction, this field is read only.

   Kanban Location
   Scan the location of the Kanban. If the **Kanban Location** parameter is cleared for this transaction, this field is read only.
4 Select **Process**. The Kanban status is changed to **On Hand**.

Canceling Kanbans (Kanban Cancel)

Kanban Cancel is a transaction belonging to the Kanban Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Kanban Sub-Menu:

1 Select **Kanban Cancel**.
2 In the **Kanban ID** field, scan the Kanban number. This information is displayed:
   - Kanban location
   - Item number
   - Number of Kanbans
3 In the **Cancel?** field, specify whether you have scanned the correct Kanban to remove from use.

If you select **Yes**, the Kanban status is changed to **Canceled**.

If you select **No**, scan the correct Kanban number in the **Kanban ID** field.

4 Select **Process**.

Reinstating Kanbans (Kanban Reinstate)

Use the Kanban Reinstate transaction to return a previously canceled Kanban to use.

Kanban Reinstate is a transaction belonging to the Kanban Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Kanban Sub-Menu:

1 Select **Kanban Reinstate**.
2 In the **Kanban ID** field, scan the Kanban number. This information is displayed:
   - Kanban location
   - Item number
   - Number of Kanbans
3 In the **Reinstate?** field, specify whether you have scanned the correct Kanban to return to use.
   a If you select **Yes**, the Kanban status is reinstated.
   b If you select **No**, scan the correct Kanban number in the **Kanban ID** field.
4 In the **Print Labels** field, specify whether to print labels for the Kanban. If you select **Yes**, specify this information:
   - Printer
   - Specify a printer to use.
   - Number of Labels
   - Specify the number of labels to print.
5 Select **Process**.

Resetting Kanbans (Kanban Reset)

Use the Kanban Reset transaction to reset the status of a Kanban to **In Stock**.

Kanban Reset is a transaction belonging to the Kanban Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Kanban Sub-Menu:

1 Select **Kanban Reset**.
2 In the **Kanban ID** field, scan the Kanban number.
3 In the **Reset?** field, specify whether you have scanned the correct Kanban to reset.

a If you select **Yes**, the Kanban status is changed to **In Stock**.

b If you select **No**, scan the correct Kanban number in the **Kanban ID** field.

4 In the **Print Labels** field, specify whether to print labels for the Kanban. If you select **Yes**, specify this information:

Printer
Specify a printer to use.

Number of Labels
Specify the number of labels to print.

5 Select **Process**.

Viewing the Status of Kanbans (Kanban Status)

The warehouse mobility icon based menu and list based menu comprises of the Kanban Menu. Kanban Reset is listed as a transaction under the Kanban Menu.

On the Kanban Menu:

1 Select **Kanban Status** transaction.

2 In the **Kanban ID** field, scan the Kanban number. This information is displayed:

- Kanban location
- Item number
- Order type
- Order number
- Position on order
- Status

Handling Unit Capabilities

This section prodvides transaction processing:

Creating Handling Units for New Containers (Create Handling Unit)

Create Handling Unit is a transaction belonging to the Handling Unit Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Handling Unit Sub-Menu:

1 Select **Create Handling Unit**.

2 In the **Create Parent** field, specify whether to create a parent for the new handling unit.

If you specify **Yes**, a new parent will be created.

If you specify **No**, specify the parent handling unit in the **Parent HU** field. Optionally, leave blank to create a handling unit without a parent.

3 Specify this information:

Item
Specify the item number of the handling unit. The item description is displayed.

Serial
If you are performing this transaction using a single serial-in-inventory time, scan the serial number. Otherwise, leave this field blank.

Whse
Specify the warehouse where the handling unit will be created. If you specified a parent handling unit or serial number, this field is pre-filled and unavailable.

Location
If applicable, specify the location where the handling unit will be created. If you specified a parent handling unit or serial number, this field is pre-filled and unavailable. This field is only displayed if the specified warehouse is location-controlled.

Lot
If applicable, specify a lot number for the items.

Inventory Date
If applicable, specify a lot number for the items.

Qty
Specify the item quantity for the handling unit.

4 If the **Input Package Definition** and **Input Packaging Item** parameters are selected for this transaction, the **Next** button is available. Select **Next**, and specify this package definition information:

Package Definition
Specify a package definition.

Packaging Item
Specify a packaging item.

Qty
Specify the quantity of packaging items.

5 Select **Process**. If the item is not serial-controlled and does not need to be assigned a lot number, the handling unit is created. If the item is serial-controlled or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed.

6 On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is displayed if the item is serial-controlled, if it is possible to generate serial numbers for this transaction, and if you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number is displayed after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

7 Select **Process**. If there are additional serial numbers or lot numbers to scan, scan them. If all needed serial and lot numbers have been scanned, the handling unit is created. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Creating Container Structures (Link Handling Unit)

To create container structures composed of multiple containers, you can add smaller containers to larger ones by linking the smaller container handling unit, called the child handling unit, to the larger container handling unit, called the parent handling unit. For example, if you add a box to a pallet, you must link the box handling unit to the pallet handling unit.

Link Handling Unit is a transaction belonging to the Handling Unit Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Handling Unit Sub-Menu:

1 Select **Link HU**.
2 Specify this information:

Create Parent
Specify whether to link the handling unit to a new parent handling unit or to assign an existing handling unit as its parent. If you specify **Yes**, a new parent will be created. If you specify **No**, specify the parent handling unit in the **Parent HU** field.

Handling Unit
Specify the child handling unit.

3 Select **Process**. If the child handling unit was linked to another parent handling unit before the transaction, it is now unlinked from that parent.

Removing Containers from Container Structures (Unlink Handling Unit)

Use the Unlink Handling Unit transaction to remove a container from a container structure. For example, if you remove a box from a pallet, you must unlink the box handling unit to the pallet handling unit.

Unlink Handling Unit is a transaction belonging to the Handling Unit Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Handling Unit Sub-Menu:

1. Select **Unlink HU**.
2. In the **Handling Unit** field, scan the handling unit of the container you are removing from the structure. The parent handling unit is displayed.
3. To unlink the handling unit from its parent, select **Process**.

Removing Items from a Container (Split Handling Unit)

When you take items out of a container, you can add them to another container or designate them as loose inventory.

Split Handling Unit is a transaction belonging to the Handling Unit Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Handling Unit Sub-Menu:

1. Select **Split Handling Unit**.
2. In the **Handling Unit** field, specify the handling unit from which the items are being removed. You can only specify handling units that have free inventory and have no children.
3. In the **Qty** field, specify the quantity to remove from the handling unit.
4. In the **Add to Another HU?** field, specify whether to add the removed items to another handling unit.
   a. If you specify **Yes**, specify the handling unit in the **Add to Handling Unit** field. Optionally, leave blank to create a new handling unit.
   b. If you specify **No**, the items will become loose inventory.
5. Select **Process**. If the item is not serial-controlled, the items are assigned to a new handling unit or become loose inventory in ERP LN. If the item is serial-controlled, or needs to be assigned a lot number, the Serial/Lot Entry screen is displayed. On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

6 Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. If all needed serial and lot numbers have been scanned, the items are assigned to a new handling unit or become loose inventory in ERP LN. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

Emptying a Container (Close Handling Unit)

When you remove all items from a container, you must close or delete the handling unit assigned to that container. If you keep the container, you should close the handling unit instead of deleting it, so you can re-use the container at a later time.

Close Handling Unit is a transaction belonging to the Handling Unit Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Handling Unit Sub-Menu:

1 Select **Close HU**.

2 In the **Handling Unit** field, specify a handling unit. If the specified handling unit has children, you are asked whether to also close the children.
3 In the **Delete HU** field, specify whether to delete or close the handling unit.
If you specify **Yes**, the handling unit will be deleted.
If you specify **No**, the handling unit will be closed.
4 Select **Close HU**.

Viewing Container Details (Handling Unit Inquiry)

Handling Unit Inquiry is a transaction belonging to the Handling Unit Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Handling Unit Sub-Menu:

1 Select **Handling Unit Inquiry**.
2 In the **Handling Unit** field, scan the handling unit of the container.
3 Optionally, select **Show Serial** to view serial and lot numbers, if applicable.
4 Optionally, select **Show HU** to view the children of the handling unit, if applicable. This information is displayed for the handling unit and each of its children:
   - Item number (not shown for multi-item handling units)
   - Item quantity (not shown for multi-item handling units)
   - Unit of measure

Labor Capabilities

This section prodvides transaction processing:

Starting Jobs (Job Booking)

You can start a single job, or, for workset-enabled employees, you can add jobs to a workset and start multiple jobs at once by starting the workset. You can use this transaction as an individual employee or as a team.

This transaction is only available when the Time Track module is not implemented.

See "Starting a Single Job" on page 83.

See "Adding an Indirect Job to a Workset" on page 84.

See "Adding a Job on an Order or Project to a Workset" on page 85.

See "Starting a Workset" on page 86.

Starting a Single Job

Job Booking is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select Job Booking.
2. Scan your employee ID or badge number and select **Next**.
3. Specify or review this information:

   Employee
   Your employee ID or badge number is displayed.

   Hours Today/This Week
   The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

   Current Job
   The current job you are working on is displayed.

   New Job Type
   Select the type of job to which you are reporting labor and, if applicable, quantities.

   Note: If the user specifies the job type as Production, the application checks if the labor set is backflushed. If the user posts labor to a job where labor is backflushed already, a warning or reject message is prompted. Based on the Backflush Option parameter setting the following types of action is performed:

   - If the parameter is set to **Warning**, the application gives a warning, if the employee tries to start or report time against a backflush job. The employee can choose to override this warning.
   - If the parameter is set to **Reject**, the application gives a rejection message, if the employee tries to start or report time against a backflush job. The employee cannot override this message.
   - If the parameter is set to **Ignore**, the application allows an employee to start or report time against a backflush job without any warning message.

   Order Number
   Scan the order or project number.

   Operation
   If applicable, specify the operation number, activity line, or labor line.

   Setup?
   Specify whether this job refers to a setup process.

   Task
   If applicable, specify the task. This field is only available if the **Input Task** parameter is selected for this transaction.

Machine
If applicable, specify the machine. This field is only available if the **Input Machine** parameter is selected for this transaction.

Work Center
If applicable, specify where the work was performed. This field is only available if the **Input Work Center** parameter is selected for this transaction.

Hourly Labor Type
If applicable, specify how to record hours. For example, **Regular**, **Overtime**, or **Double-time**. This field is only available if the **Input Hourly Labor Type** parameter is selected for this transaction.

Cost Component
If applicable, specify the cost component to use for the reported hours. This field is only available if the **Cost Component** parameter is selected for this transaction.

4. Select **Process**.

Adding an Indirect Job to a Workset

Job Booking is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select Job Booking.
2. Scan your employee ID or badge number and select **Next**.
3. Specify or review this information:

Employee
Your employee ID or badge number is displayed.

Jobs Started
The number of jobs that you and, if applicable, your team are currently working on are displayed.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Current Job
The current job you are working on is displayed. If you are working on more than one job, the number of jobs is displayed.

Stop Workset?
Specify whether to stop the current workset. If you select **Yes**, the current workset will be stopped, and the job you are adding will be added to a new workset.

New Job Type
Select **Indirect**.

4. Specify or review this information:

Employee
Your employee ID or badge number is displayed.

Jobs Started/Starting
The number of jobs that you and, if applicable, your team are currently working on are displayed to the left of the slash; the number of jobs that are queued for your workset but not yet started are displayed to the right of the slash.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Job Type
The type of job you are starting is displayed.

Setup?
Specify whether this job refers to a setup process.

Task
If applicable, the task is displayed.

Machine
If applicable, specify the machine. This field is only available if the **Input Machine** parameter is selected for this transaction.

Work Center
If applicable, specify where the work was performed. This field is only available if the **Input Work Center** parameter is selected for this transaction.

Hourly Labor Type
If applicable, specify how to record hours. For example, **Regular**, **Overtime**, or **Double-time**. This field is only available if the **Input Hourly Labor Type** parameter is selected for this transaction.

Cost Component
If applicable, specify the cost component to use for the reported hours. This field is only available if the **Cost Component** parameter is selected for this transaction.

5. To add the job to your workset, select **Add**. If the workset is currently running, the job is started.
6. Optionally, press **F2** to start the workset.

Adding a Job on an Order or Project to a Workset

Job Booking is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select Job Booking.
2. Scan employee ID or badge number and select **Next**.
3. Specify or review this information details:

Employee
The employee ID or badge number is displayed.

Jobs Started
The number of jobs that you or the team are currently working on.

Hours Today/This Week
The number of hours that you or the team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Current Job
The job you are currently working on. The number of jobs is displayed if you are working on more than one job.

Stop Workset?
Specify whether to stop the current workset. The current workset is stopped if you select**Yes** and the job you are adding is added to a new workset.

New Job Type
The type of order or project.

Order Number
The order or project number. The field is not displayed if you select **Indirect** in the **New Job Type** field.

Operation
The operation number, activity line, or labor line.

4. Select **Process**.

   Note: You can press **F2** to start the workset.

Starting a Workset

Job Booking is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Job Booking**.
2. Scan your employee ID or badge number and select **Next**.
3. Review this information:

Employee
Your employee ID or badge number is displayed.

Jobs Started
The number of jobs that you and, if applicable, your team are currently working on are displayed.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Current Job
The current job you are working on is displayed. If you are working on more than one job, the number of jobs is displayed.

4. To start the workset, press **F2**. All jobs that are queued to the workset are started.

Stopping Jobs

You can stop a single job, or, for workset-enabled employees, a workset. When stopping a single job, you can report completed quantities. You can use this transaction as an individual employee or as a team.

This transaction is only available when the Time Track module is not implemented.

See "Stopping a Single Job" on page 87.

See "Stopping a Workset" on page 88.

Stopping a Single Job

Job Booking is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Job Booking**.
2. Scan your employee ID or badge number and select **Next**.
3. Specify or review this information:

Employee
Your employee ID or badge number is displayed.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Job Type
The type of job you are stopping is displayed.

Order Number
The number of the order or project you are stopping is displayed.

Operation
The operation number, activity line, or labor line you are stopping is displayed.

Task
If applicable, the task is displayed.

Open Quantity
The quantity to be completed is displayed.

Qty Completed
Specify quantity you completed.

Qty Rejected
If applicable,specify the quantity you are rejecting.

Reason Code
If applicable specify the reason for the rejections.

Complete? (Y/N)
If the operation, activity line, or labor line is complete, specify **Y**. If more quantities need to be completed for this operation, activity line, or labor line, specify **N**.

4 Select **Process**.

Stopping a Workset

Job Booking is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1 Select **Job Booking**.
2 Scan your employee ID or badge number and select **Next**.
3 Specify or review this information:

Employee
Your employee ID or badge number is displayed.

Jobs Started
The number of jobs that you and, if applicable, your team are currently working on are displayed.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Current Job
The current job you are working on is displayed. If you are working on more than one job, the number of jobs is displayed.

Stop Workset?
Select **Yes**.

4 Select **Process**.

Reporting Elapsed Hours (Elapsed Hours)

Use the Elapsed Hours transaction to report labor and quantities to jobs. You can use this transaction as an individual employee or as a team.

This transaction is only available when the Time Track module is not implemented.

Elapsed Hours is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1 Select Elapsed Hours.
2 Scan your employee ID or badge number and select **Next**.
3 Specify or review this information:

Employee
Your employee ID or badge number is displayed.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Job Type
Select the type of job to which you are reporting labor and, if applicable, quantities.

Note: If the user specifies the job type as Production, the application checks if the labor set is backflushed. If the user posts labor to a job where labor is backflushed already, a warning or reject message is prompted. Based on the Backflush Option parameter setting the following types of action is performed:

- If the parameter is set to **Warning**, the application gives a warning, if the employee tries to start or report time against a backflush job. The employee can choose to override this warning.
- If the parameter is set to **Reject**, the application gives a rejection message, if the employee tries to start or report time against a backflush job. The employee cannot override this message.
- If the parameter is set to **Ignore**, the application allows an employee to start or report time against a backflush job without any warning message.

Order
Scan the order or project number.

Operation
If applicable, specify the operation number, activity line, or labor line.

Task
If applicable, specify the task. This field is only available if the **Input Task** parameter is selected for this transaction.

Machine
If applicable, specify the machine code. This field is only available if the **Input Machine** parameter is selected for this transaction.

Work Center
If applicable, specify where the work was performed. This field is only available if the **Input Work Center** parameter is selected for this transaction.

Hourly Labor Type
If applicable, specify how to record hours. For example, **Regular**, **Overtime**, or **Double-time**. This field is only available if the **Input Hourly Labor Type** parameter is selected for this transaction.

Cost Component
If applicable, specify the cost component to use for the reported hours. This field is only available if the **Cost Component** parameter is selected for this transaction.

Man Hours
Specify how many hours you worked on this job.

Machine Hours
Specify how many hours you used the machine for this job. This field is only available if you specified a value in the **Machine** field.

4. Select **Next**.
5. Specify or review this information:

Employee
Your employee ID or badge number is displayed.

Hours Today/This Week
The number of hours that you and, if applicable, your team have worked today is displayed to the left of the slash; the number of hours worked this week is displayed to the right of the slash.

Job Type
The job type is displayed.

Order
The order or project number is displayed.

Operation
If applicable, the operation number, activity line, or labor line is displayed.

Task
If applicable, the task is displayed.

Open Qty
The quantity to be completed is displayed.

Qty Completed
Specify the quantity that you completed.

Qty Rejected
If applicable, specify the quantity that you are rejecting.

Reason Code
If applicable, specify the reason code for the rejections.

Complete? (Y/N)
If the operation, activity line, or labor line is complete, specify **Y**. If more quantities need to be completed for this operation, activity line, or labor line, specify **N**.

6 Select **Process**.

Joining Teams (Manage Team)

Use the Manage Team transaction to join a team. You must start your shift before you can join a team.

This transaction is only available when the Time Track module is not implemented.

Manage Team is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Manage Team**.
2. In the **Team** field, specify a team. The current number of team members is displayed in the Team Count field. Optionally, select **Members** to view the employees on the team.
3. In the**Badge** field, scan your employee ID or badge number.
4. Select **Join Team**.

Leaving Teams

Use the Manage Teams transaction to leave a team. You must start your shift before you can leave a team.

This transaction is only available when the Time Track module is not implemented.

Manage Team is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Manage Teams**.
2. In the **Team** field, specify a team. The current number of team members is displayed in the **Team Count** field. Optionally, select **Members** to view the employees on the team.
3. In the**Badge** field, scan your employee ID or badge number.
4. Optionally, in the **New Team** field, select a new team to join. You will leave your current team and join the new team.
5. Select **Leave Team**.

Resetting the Status of an Employee (Reset Employee)

Use the Reset Employee transaction to return an employee to an idle state. The employee's shift will be ended, and the employee will be removed from any teams and unassigned from any activities.

This transaction is only available when the Time Track module is not implemented.

Reset Employee is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Reset Employee**.
2. In the **Employee** field, scan your employee ID or badge number.
3. Select **Reset Employee**.

Starting Shifts (Start/Stop Shift)

This transaction is only available when the Time Track module is not implemented.

Start/Stop Shift is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Start/Stop Shift**.
2. In the **Employee** field, scan your employee ID or badge number.
3. In the **Shift** field, specify a shift to start. Your default shift is specified by default.
4. Select **Start Shift**.

Stopping Shifts

This transaction is only available when the Time Track module is not implemented.

Start/Stop Shift is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1. Select **Start/Stop Shift**.
2. In the **Employee** field, scan your employee ID or badge number. Your shift and the time it started are displayed.
3. Select **Stop Shift**.

Viewing Teams

This transaction is only available when the Time Track module is not implemented.

Manage Team is a transaction belonging to the Labor Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Labor Sub-Menu:

1 Select **Manage Team**.
2 In the **Team** field, specify a team. The current number of team members is displayed in the Team Count field.
3 Select **Members**. The employees currently assigned to the team are displayed.

Packing Capabilities

This section prodvides transaction processing:

Packing Items by Order (Packing by Order)

Use the Packing by Order transaction to pack items for an order. There are two ways that you can pack items using this transaction:

- Using pre-packed items:

  Use this packing method if the items on the order line are already packed in a container structure that meets the shipping requirements. You can confirm that the container structure is correct, or, if there are problems with the container structure, you can break it up and rebuild the structure manually.

  See "Packing Items by Order Using Pre-packed Items" on page 93.

- Packing items without a pre-defined structure

  Use this packing method if the items on the order line do not need to match a specific container structure. Using your own discretion, you can create any container structure that is appropriate for the situation.

  See "Packing Items by Order Without a Pre-defined Structure" on page 94.

You may need to use multiple packing methods for an order.

Packing Items by Order Using a Pre-Defined Structure

Packing by Order is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Packing by Order**.
2 In the **Handling Unit** field, scan the handling unit to be packed.
3 Specify or review this information:

Handling Unit
The handling unit being packed is displayed.

Order Number
The order number associated with the handling unit is displayed.

Package Definition
The package definition of the handling unit is displayed.

Confirm?
Specify whether the handling unit structure is correct and should be confirmed as a package.

Break?
Specify whether to break up the handling unit for re-packing. If there is a problem with the handling unit, you should select **Yes**. This field is only displayed if you selected **Yes** in the **Confirm?** field.

4 Select **Process**. The handling unit is either confirmed as a package or broken up for re-packing.

If the handling unit is confirmed as a package, then any child handling units that handling unit contains are also confirmed as packages.

If the handling unit is broken up for re-packing, the handling unit is removed from the order line, and a placeholder handling unit is created to account for the item quantity.

Packing Items by Order Without a Pre-defined Structure

Packing by Order is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Packing by Order**.
2 Specify some or all of this information:

Handling Unit
Leave this field blank.

Order Type
Optionally, select the order type on the order.

Order Number
Optionally, scan the order number on the order.

Item Number
Optionally, scan the item number.

Lot Number
Optionally, if applicable, scan the lot number.

Serial Number
Optionally, if you are performing this transaction using a single serial-in-inventory item, scan the serial number. Otherwise, leave this field blank.

3 Select **Next**. Using the specified information, a search is performed to find associated order lines that need to be packed. If more than one order line is found, a list of order lines is displayed; select an order line to pack from this list.

4 Specify or review this information:

Order Number
The order you are packing is displayed.

Package
Specify a package to use for packing. The package must be unsealed. Optionally, leave blank to use a new package.

Packaging Item
Specify a packaging item to use for the package. If you are using an existing package, the correct packaging item might be specified by default.

Position Number
The order line you are packing is displayed. If the line you are packing is composed of multiple order lines with serial numbers at the same stock points, this field is blank.

Item Number
The item you are packing is displayed.

Lot Number
If applicable, the lot number is displayed.

Unpacked Quantity
The unpacked quantity on the order line is displayed.

Quantity
Specify the quantity to pack.

Enter Serials/Lots?
Specify whether to record the exact serial numbers and lots being packed. This field is only available if the items being packed are serial-controlled or lot-controlled.

5 Select **Process**.

If you selected **Yes** in the **Enter Serials/Lots?** field, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

b Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

The specified quantity of items on the order line are packed. If you are using a new package, a package label is printed.

Packing Items by Shipment

Use the Packing by Shipment transaction to pack items for a shipment. There are three ways that you can pack items using this transaction:

- Using pre-packed items:

  Use this packing method if the items on the shipping line are already packed in a container structure that meets the shipping requirements. You can confirm that the container structure is correct, or, if there are problems with the container structure, you can break it up and rebuild the structure manually.

  See "Packing Items by Shipment Using Pre-packed Items" on page 97.

- Packing items using a pre-defined structure:

  Use this packing method if the items on the shipping line must be packed in a pre-defined container structure that does not match the current structure of the picked items. You can create a container structure for the items that meets the shipping requirements.

  See "Packing Items by Shipment Using a Pre-defined Structure" on page 97.

- Packing items without a pre-defined structure:

  Use this packing method if the items on the shipping line do not need to match a specific container structure. Using your own discretion, you can create any container structure that is appropriate for the situation.

See "Packing Items by Shipment Without a Pre-defined Structure" on page 99.

You may need to use multiple packing methods for a shipment.

Packing Items by Shipment Using Pre-Packed Items

Packing by Shipment is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Packing by Shipment**.
2 In the **Handling Unit** field, scan the handling unit to be packed.
3 Specify or review this information:

   Handling Unit
   The handling unit being packed is displayed.

   Shipment Number
   The shipment number associated with the handling unit is displayed.

   Package Definition
   The package definition of the handling unit is displayed.

   Confirm?
   Specify whether the handling unit structure is correct and should be confirmed as a package.

   Break?
   Specify whether to break up the handling unit for re-packing. If there is a problem with the handling unit, you should select **Yes**. This field is only displayed if you selected **Yes** in the **Confirm?** field.

4 Select **Process**. The handling unit is either confirmed as a package or broken up for re-packing.

   If the handling unit is confirmed as a package, then any handling units it contains are also confirmed as packages.

   If the handling unit is broken up for re-packing, the handling unit is removed from the shipment line, and a placeholder handling unit is created to account for the item quantity.

Packing Items by Order Using a Pre-defined Structure

Packing by Shipment is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Packing by Shipment**.
2 Specify some or all of this information:

   Handling Unit
   Leave this field blank.

Shipment
Optionally, scan the shipment to be packed.

Order Type
Optionally, select the order type on the shipment.

Order Number
Optionally, scan the order number on the shipment.

Item Number
Optionally, scan the item number.

Lot Number
Optionally, if applicable, scan the lot number.

Serial Number
Optionally, if you are performing this transaction using a single serial-in-inventory item, scan the serial number. Otherwise, leave this field blank.

3 Select **Next**. Using the information you specified, a search is performed to find associated shipment lines that need to be packed. If more than one shipment line is found, a list of shipment lines is displayed; select a shipment line to pack from this list.

If the handling unit contains other handling units, the parent handling unit number, shipment number, and package definition are displayed along with a list of all the child handling units that need be packed. Select a child handling unit to pack.

If the handling unit does not contain other handling units, you do not need to select which handling unit to pack. For example, if you are packing a pallet (parent handling unit) containing five boxes (child handling units) of items, you must pack the five boxes, one-by-one, using the following steps before you can pack the pallet. However, if you are packing a pallet (only handling unit) holding items that are not contained in separate boxes assigned to handling units, then you can pack the pallet without having to pack other handling units first.

4 Specify or review this information:

Parent Handling Unit
The parent of the handling unit that you are packing is displayed. This field is only displayed if the handling unit you are packing is contained by other handling units.

Handling Unit
The handling unit being packed is displayed.

Order Number
The order number associated with the handling unit is displayed.

Package Definition
The package definition of the handling unit is displayed.

Item Number
The item number is displayed.

Quantity
The quantity of items in the handling unit are displayed.

Confirm?
Specify whether the handling unit has been packed correctly and should be confirmed as a package.

Break?
Specify whether to break up the handling unit for re-packing. If there is a problem with the handling unit, you should select **Yes**. This field is only displayed if you selected **Yes** in the **Confirm?** field.

5 Select **Process**. If there are additional handling units that need to be packed as part of the package structure for this shipment line, select another handling unit to pack using the instructions in the step above. If there is only one additional handling unit left to pack, it is automatically selected.

   All confirmed handling units on the shipment line are packed. If any handling units were broken up for re-packing, those handling units are removed from the shipment line, and placeholder handling units are created to account for the item quantity. Package labels for all packed handling units are printed.

Packing Items by Shipment Without a Pre-defined Structure

Packing by Shipment is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Packing by Shipment**.
2 Specify some or all of this information:

   Handling Unit
   Leave this field blank.

   Shipment
   Optionally, scan the shipment to be packed.

   Order Type
   Optionally, select the order type on the shipment.

   Order Number
   Optionally, scan the order number on the shipment.

   Item Number
   Optionally, scan the item number.

   Lot Number
   Optionally, if applicable, scan the lot number.

   Serial Number
   Optionally, if you are performing this transaction using a single serial-in-inventory item, scan the serial number. Otherwise, leave this field blank.

3 Select **Next**. Using the information you specified, a search is performed to find associated shipment lines that need to be packed. If more than one shipment line is found, a list of shipment lines is displayed; select a shipment line to pack from this list.
4 Specify or review this information:

   Shipment Number
   The shipment you are packing is displayed.

Package
Specify a package to use for packing. The package must be unsealed. Optionally, leave blank to use a new package.

Packaging Item
Specify a packaging item to use for the package. If you are using an existing package, the correct packaging item might be specified by default.

Position Number
The shipment line you are packing is displayed. If the line you are packing is composed of multiple shipment lines with serial numbers at the same stock points, this field is blank.

Item Number
The item you are packing is displayed.

Lot Number
If applicable, the lot number is displayed.

Unpacked Quantity
The unpacked quantity on the shipment line is displayed.

Quantity
Specify the quantity to pack.

Asset Tag
This field is enabled if the add_asset parameter is selected in the transaction set maintenance form.

Note:

- This field is mandatory if the asset_tag_mandatory child parameter is selected in the transaction set maintenance form.
- The Asset Tag is defaulted, if an existing Handling Unit is added to the transaction.
- If the validate_asset_tag child parameter is selected in the transaction set maintenance form, the parameter must validate that the specified asset tag is not related to an Open or Active Handing Unit.

Enter Serials/Lots?
Specify whether to record the exact serial numbers and lots being packed. This field is only available if the items being packed are serial-controlled or lot-controlled.

5 Select **Process**.

If you selected **Yes** in the **Enter Serials/Lots?** field, the Serial/Lot Entry screen is displayed.

a On the Serial/Lot Entry screen, specify or review this information:

Item number
The item number and description are displayed.

Quantity remaining
The quantity that needs to be assigned serial or lot numbers is displayed.

Generate Serials?
To generate new serial numbers for the items, select **Yes**. To scan existing serial numbers, select **No**. This field is only displayed if the item is serial-controlled, it is possible to generate serial numbers for this transaction, and you have not scanned any serial numbers.

All Serials?
Select **Yes** to indicate that all serial numbers for this item at the current stock point are being used in the transaction. Selecting **Yes** in this field removes the need to individually scan each serial number. This field is only displayed if the item is serial-controlled and you are performing a transaction using all the items in a stock point.

Lot Number
If applicable, scan a lot number to assign to the item. This field is only available if the item is not serial-controlled and needs to be assigned a lot number. If the item is serial-controlled, the item lot number displays in this field after you scan the first serial number.

Serial Number
Scan a serial number. This field is only displayed if the item is serial-controlled, you are not generating new serial numbers, and you did not select **Yes** in the **All Serials?** field.

Quantity
Specify a quantity to assign to the specified lot number. This field is only available if the item is not serial-controlled and needs to be assigned a lot number.

b Select **Process**. The scanned serial number or lot number is processed. If there are additional serial numbers or lot numbers to scan, scan them. Optionally, press **X** to view serial or lot numbers that you have scanned. Optionally, press **Y** to reset all scanned serial or lot numbers, so you can re-scan them.

The specified quantity of items on the shipment line are packed. If you are using a new package, a package label is printed.

Repacking Items (Repacking)

You perform one or more of these actions in a single Repacking transaction:

- add a package to another package
- remove a package from another package
- unpack a package

Repacking is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1. Select **Repacking**.
2. Scan the handling unit of the package that you are repacking. The package can be sealed or unsealed.
3. Specify or review this information:

Handling Unit
The handling unit is displayed.

Shipment Number
The shipment number associated with the handling unit is displayed.

Order Number
The order number associated with the handling unit is displayed.

Packaging Item
Optionally, specify a new packaging item for the package. The packaging item currently assigned to the package is displayed.

Add To?
Specify whether to add this package to another package. This field is only available if the package is not already contained by a parent package.

Remove From?
Specify whether to remove this package from its parent package. This field is only available if the package is contained by a parent package.

Parent HU
Specify the package to which you are adding this package. The package you specify must be unsealed. Optionally, leave blank to create a new package. This field is only available if you are adding the package to another package.

Packaging Item
Specify the packaging item to use. This field is only available if you are adding the package to another package.

Unpack?
Specify whether to unpack the package. The package must be unsealed before it can be unpacked. This field is only available if the package is not already contained by a parent package and is not currently being added to one.

4. Select **Process**.

Sealing Packages (Sealing)

After sealing a package, you can also choose to freeze shipment lines associated with that package.

Sealing is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1. Select **Sealing**.
2. Scan the handling unit of the package. The package must not be loaded.
3. Specify or review this information:

Handling Unit
The handling unit of the package is displayed. Based on the parameter setting in the transaction set maintenance form the following scenario is applicable:

- If the seal_by_shipment parameter is selected, the **Shipment** field is enabled and the user is able to scan the sealing packages using the **Handling Unit** field or the **Shipment number** field.
- If shipment is specified, a new form is displayed with the fowling information:

- Status/Line
- Item/Qty
- Handling Unit
- Pack Item/PD

The user must select one of the field and click **Next**.

A new Seal form is displayed and the user can scan the following fields using the applicable Handling Unit Number:

Order Number
The order number associated with the handling unit is displayed.

Packaging Item
Optionally, specify a new packaging item for the package. The packaging item currently assigned to the package is displayed.

Seal?
To seal the package, specify **Yes**. Any child packages contained by this package will also be sealed.

Asset Tag
This field is enabled if the add_asset parameter is selected in the transaction set maintenance form.

Note:

- This field is mandatory if the asset_tag_mandatory child parameter is selected in the transaction set maintenance form.
- The Asset Tag is defaulted, if an existing Handling Unit is added to the transaction.
- If the validate_asset_tag child parameter is selected in the transaction set maintenance form, the parameter must validate that the specified asset tag is not related to an Open or Active Handing Unit.

Unseal?
This field is unavailable when you are sealing a package.

Children?
This field is unavailable when you are sealing a package.

4 Select **Process**. You are asked whether to freeze the shipment lines associated with the package. To freeze these shipment lines, select **Yes**. To leave them unfrozen, select .

Unsealing Packages

After unsealing a package, you can also choose to unfreeze shipment lines associated with that package.

Sealing is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Sealing**.
2 Scan the handling unit of the package. The package must not be loaded.

3 Specify or review this information:

Handling Unit
The handling unit of the package is displayed.

Shipment Number
The shipment number associated with the handling unit is displayed.

Order Number
The order number associated with the handling unit is displayed.

Packaging Item
Optionally, specify a new packaging item for the package. The packaging item currently assigned to the package is displayed.

Seal?
This field is unavailable when you are sealing a package.

Unseal?
To unseal the package, specify **Yes**.

Children?
To also unseal any child packages contained in this package, specify **Yes**. To only unseal the parent package, specify **No**.

4 Select **Process**. You are asked whether to unfreeze the shipment lines associated with the package. To unfreeze these shipment lines, select **Yes**. To leave them frozen, select **No**.

Viewing Packages (Packing Inquiry)

Use the Packing Inquiry transaction to view the packaging structure for a shipment or order.

Packing Inquiry is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Packing Inquiry**.

2 Specify some or all of this information:

Handling Unit
Optionally, scan a handling unit associated with the shipment or order.

Shipment
Optionally, scan a shipment number.

Order Type
Optionally, select an order type.

Order Number
Optionally, scan an order number.

3 Select **Next**. Using the information specified above, a search is performed to find associated shipment or order lines. This information is displayed for each line:

- line status
- line number
- item number
- item quantity
- handling unit
- packaging definition

4 Optionally, if the package associated with a line contains child packages, select that line to view information for the child packages. This information is displayed for each child package:

- line status
- line number
- item number
- item quantity
- handling unit
- packaging definition

Loading Packages (Loading)

You can only load sealed packages that are associated with a shipment.

Loading is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1 Select **Loading**.

2 Scan the handling unit of the package.

3 Specify or review this information:

Handling Unit
The handling unit of the package is displayed.

Shipment Number
This field is enabled if the Load by Shipment parameter is selected in the transaction set maintenance form. The shipment number associated with the handling unit is displayed.

Note:

- If the Allow Unpicked Lines parameter is selected in thetransaction set maintenance form, the projected shipment is used for the transaction. However, if the Handling Unit is specified, then the project shipment is linked to the HU.
- If the shipment number is specified, a new form is displayed with these information
  - Status/Line
  - Item/Qty
  - Handling Unit

- Pack Item/PD

The user must select one of the field and click **Next**.

A new Loading form is displayed and the user can scan the following fields using the applicable Handling Unit Number:

Load Number
The load number associated with the shipment is displayed.

Packaging Item
Optionally, specify a new packaging item for the package. The packaging item currently assigned to the package is displayed.

Pre-Assigned Dock
The dock to which the load has been pre-assigned is displayed. This field is only displayed if you are using pre-assigned docks in ERP LN.

Load?
To load the package, specify **Yes**.

Dock
Specify the dock onto which you are loading the package. If you leave this field blank or specify a different dock from the one used for other packages on the same load, the load will be split. You can only split loads if the **Load** packing parameter is selected in ERP LN.

Note:

- If the Use Shipment as Dock parameter is selected in the transaction set maintenance form, the shipment number is defaulted in the **Dock** field. The user is not allowed to modify the field.
- If the Use Load as Dock parameter is selected in the transaction set maintenance form, the shipment's load number is defaulted in the**Dock** field. The user is not allowed to modify the field.
- If the Ignore Dock parameter is selected in the transaction set maintenance form, the dock field is defaulted with the Dock value. The user is not allowed to modify the field.

Handling Unit
The handling unit of the package is displayed.

Asset Tag
This field is enabled if the add_asset parameter is selected in the transaction set maintenance form.

Note:

- This field is mandatory if the asset_tag_mandatory child parameter is selected in the transaction set maintenance form.
- The Asset Tag is defaulted, if an existing Handling Unit is added to the transaction.
- If the validate_asset_tag child parameter is selected in the transaction set maintenance form, the parameter must validate that the specified asset tag is not related to an Open or Active Handing Unit.

4 Select **Process**.

Unloading Packages

Loading is a transaction belonging to the Packing Sub-Menu on the Warehouse Mobility icon based and list based menus.

On the Packing Sub-Menu:

1. Select **Loading**.
2. Scan the handling unit of the package.
3. Specify or review this information:

   Handling Unit
   The handling unit of the package is displayed.

   Shipment Number
   The shipment number associated with the handling unit is displayed.

   Load Number
   The load number associated with the shipment is displayed.

   Packaging Item
   Optionally, specify a new packaging item for the package. The packaging item currently assigned to the package is displayed.

   Pre-Assigned Dock
   The dock to which the load has been pre-assigned is displayed. This field is only displayed if you are using pre-assigned docks in ERP LN.

   Load?
   This field is unavailable when you are unloading a package.

   Dock
   This field is unavailable when you are unloading a package.

   Unload?
   To unload the package, specify **Yes**.

   New Shipment?
   This field is unavailable when you are unloading a package.

   Shipment Number
   This field is unavailable when you are unloading a package.

4. Select **Process**.

Utilities

This section includes these transcations:

Printing Labels

Many Warehouse Mobility transactions support label printing. If the **Print Labels** parameter is selected for a transaction, the label printing process will be initiated upon completion of the transaction. There are separate label printing processes for printing basic labels and for printing labels for handling units, Kanbans, multi-serial number items, and multi-lot number items.

See "Printing Basic Labels" on page 108.

See "Printing Handling Unit, Kanban, Multi-serial Number Item, and Multi-lot Number Item Labels" on page 108.

Printing Basic Labels

1 On the Label Printing screen, specify this information:

Printer
Select a printer.

Labels per Box
Specify the number of labels to print for each box.

Label Name
The name of the label to be printed is displayed. Optionally, select a different label name to print.

Qty Remaining
The number of remaining labels to be printed is displayed.

No of Boxes
Specify the number of boxes for which to print labels.

Qty per Box
Specify how many items are in each box.

Optionally, press **X** to clear the **No of Boxes** and **Qty Per Box** fields and to reset the **Qty Remaining** field.

2 Select **Print**.

Printing Handling Unit, Kanban, Multi-serial Number Item, and Multi-lot Number Item Labels

1 On the Label Printing screen, specify this information:

Printer
Select a printer.

Number of Labels
The number of labels to be printed is displayed. Optionally, select a different quantity.

Label Name
The name of the label to be printed is displayed. Optionally, select a different label name to print.

2 Select **Print**.

Reprinting Labels

1 Select the **Reprint Label** button from the toolbar.

2 Specify or review this information:

User ID
You user ID is displayed.

Date
The current date is displayed.

Request ID
Optionally, specify the request ID of the label you are reprinting.

Transaction Name
Optionally, specify a transaction name for which to search for labels to reprint.

3 Select **Search**. If more than one label is found in the search, select a label to reprint from the list and select **Next**.

4 Specify or review this information:

Printer
Select a printer.

Transaction Name
The name of the transaction for which the label was printed is displayed.

Label Name
The label name is displayed.

No Of Copies
Specify the number of copies of the label to print.

5 Select **Reprint**.