Infor SCM Warehouse Management 2000 Introduction and Navigation Guide

Important Notices

Trademark Acknowledgements

Publication Information

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Contents

About this guide

The *Introduction and Navigation Guide* is intended as an overview. You can find specific information about transactions and database editing functions in the Infor SCM Warehouse Management 2000 Reference Guides.

Each chapter describes a set of related transactions. This information includes a screen representation of the transaction, as well as a description of:

- How to execute a transaction.
- Each of the fields on the screen.
- How to execute certain options from the command buttons, such as add, browse, delete, and modify.

Intended audience

Any user can find the Infor SCM Warehouse Management 2000 guides useful, whether an associate working in a warehouse, a manager or supervisor, or a system administrator. Each manual is organized by task type, such as Shipping or Receiving. Some tasks might overlap, depending on the organization of your business.

Note: This manual assumes the reader has a general knowledge of warehouse operations.

Related documents

- You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in "*All Infor SCM Warehouse Management 2000 Guides*

Contacting Infor" on page 6.

- *All Infor SCM Warehouse Management 2000 Guides*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

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

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

Chapter 1 Accessing Infor SCM Warehouse Management 2000

1

Components

Application Administration

Application Administration allows you to:

- Set up basic system information, such as menus, language, and defaults.
- Set up basic user information, such as user ID and associate ID.
- Manage and control printing and reporting functions.
- Send data between the host computer and Infor SCM Warehouse Management 2000.

Inventory Control

Inventory Control allows you to:

- View and maintain location information, including: location status information, location history information, and product location assignments.
- View and maintain product information, including: information about the relationship between products and locations, product movement and product movement history information, and product warehouse assignment information.
- Perform inventory adjustments and pallet moves.
- Adjust for warehouse markouts.
- Take physical inventory of products and locations.

Labor Control

Labor Control allows you to:

- Review and edit associate time records.

- Print badges.
- Log and monitor work exceptions.
- Maintain work schedules.
- View and maintain assignment information.
- Suspend and restart assignments.

Paperless Productivity

Paperless Productivity allows you to strategically assign replenishment and putaway work to forklift drivers. It also enables supervisors to inquire on and react to the amount of work left to complete; the areas within the facility that contain the work; and the priority of the work.

Receiving

Receiving allows you to:

- View information about products, purchase orders, and vendors.
- Set and maintain appointments.
- Enter receipts and perform receipt verification.
- Generate license plates.

Reporting

The *Reporting* process generates reports about shipping, receiving, inventory control, locations, products, labor control, and application administration, including purges, interfaces, and batch processes.

Shipping

Shipping allows you to:

- Prepare the system for the inventory reduction process.
- Manage the shipment and billing of customer orders.
- Replenish selection locations.
- Pick products for movement to the shipping area.
- Control the shipment of inventory.
- Maintain customer information and work assignments.

Logging on to Infor SCM Warehouse Management 2000

The Infor SCM Warehouse Management 2000 is a very powerful and flexible system. You can access it using a Web browser, such as Internet Explorer, or by a hand-held or fork-mounted RF terminal.

When you log on to the system with your user ID, Infor SCM Warehouse Management 2000, knows the type of work you perform and if you use a Web browser or RF terminal to perform it.

Note: When using the system, you see only the functions you need to perform your job.

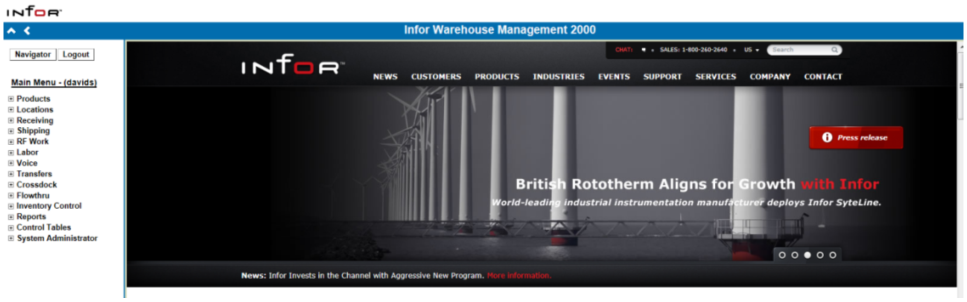
Browser logon

To log on using a Web browser:

1 If you have the Infor SCM Warehouse Management 2000 application added to your Favorites menu, click the Infor SCM Warehouse Management 2000 link to launch the application.

2 Enter your **User Name** and **Password.**

3 To proceed, click **Accept**. A configurable Website splach screen is displayed. The Infor SCM Warehouse Management 2000 Main Tree Menu is on the left side of the screen



Hand-held login

To log in to a hand-held terminal, a screen similar to the one below displays.

```
AIX Version 7
Copyright IBM Corporation, 1982, 2011.
login:
```

4 Enter your **user ID** and **password**. Once the system validates your user ID and password, the Terminal Select Menu displays. The Terminal Select Menu offers a list of numbered choices that can display slightly different depending on the type of terminal you use.

If you use different types of terminals, the Terminal Select Menu asks which type of terminal you are logging in to. The hand-held Terminal Select Menu displays.

```
Terminal Select Menu

  1. Full Screen
  2. Handheld
  3. Fork-mounted
  4. Quit

 Pick a terminal: _
```

5 At *Pick a terminal*, type the number of the hand-held option you want to use and press Enter.

6 You must also choose which environment to log in to. Depending on the permissions assigned to you by your UNIX Administrator, the Instance Menu, or the Receiver HH Menu displays.

```
====================
Instance Menu -- V4.0
====================
dev2000  (F) 01/18/02

1. C4GL Develo (Rdy)
2. C4GL Accept (N/A)
3. 5.2 Patch D (N/A)
4. 3.20.1a Ora (Off)
5. D4GL Develo (Rdy)
6. D4GL Accept (N/A)
7. Oracle Acce (Off)

   Select one: _
====================
```

The Instance Menu lists instances on the host machine where Infor SCM Warehouse Management 2000 resides. Several instances can display, such as a production instance, a training instance, and a development instance. The status of the instance, such as *Rdy* (ready), displays to the right of each selection.

7 Type the number of the instance you want to access and press Enter. The Receiver HH Menu displays.

```
RECEIVER HH MENU
  [1] RF Receive
  [2] RF Verify
  [3] Build MPP's
  [4] Stocker Recv
  [5] XDock Maint
  [6] RF Unload
  [7] Inquiry Menu
```

Notes:

- The items on the Main Menu can vary from these examples, since the flexibility of Infor SCM Warehouse Management 2000 allows only those items you use to display. From the Main Menu, you can select to work with either the functional area or transaction.
- Command messages display on the top line of each RF transaction. Online help is not available on RF transactions.

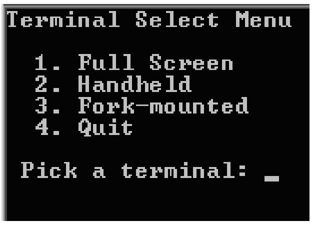
Fork-mount terminal login

To log in to a fork mount terminal, begin with the login screen.

1 Enter your **user ID** and **password**. Once the system validates your user ID and password, the Main Menu displays.

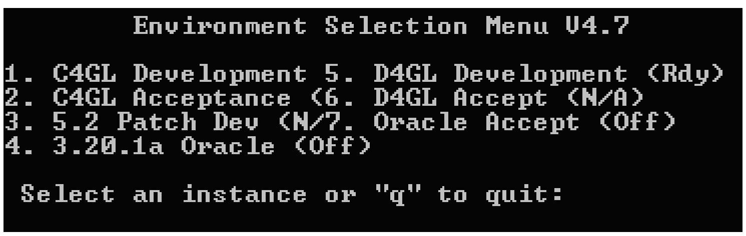
```
AIX Version 7
Copyright IBM Corporation, 1982, 2011.
login:
```

2 Select the type of terminal you are logging in to (If you use different types of terminals, the system asks you to select the type of terminal). The hand-held Terminal Select Menu displays. The Terminal Select Menu offers a list of numbered choices, slightly different depending on the type(s) of terminal(s) you usually use.

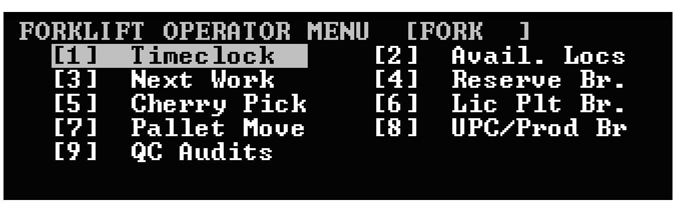


3 Type the number of the Fork-mounted option and press Enter.

Depending on the permissions assigned to you by your UNIX Administrator, the Fork Mount Environment Selection Menu, or the Forklift Operator Menu displays.



4 On the Instance Menu, the items listed are instances on the host machine where Infor SCM Warehouse Management 2000 resides. Several instances can display, such as a production instance, a training instance, and a development instance. The status of the instance, such as *Rdy* (ready), displays to the right of each selection. Type the number of the instance you want to access and press Enter. The Forklift Operator Menu displays.

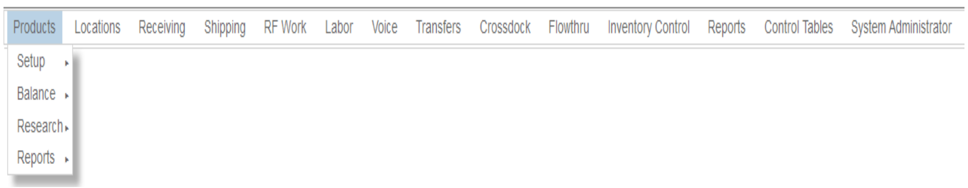


Notes:

- Since the flexibility of Infor SCM Warehouse Management 2000 allows only those items you use to display, the items on the Main Menu can vary from these examples. From the Main Menu, you can select to work with either the functional area or transaction.
- Command messages display on the top line of each RF transaction. Online Help is not available on RF transactions.

Menus

Drop Down menus provide a list of menu options. The Infor SCM Warehouse Management 2000 Main Menu is a drop down menu. You can expand by clicking on the top level menu options. Then change the expanded menu by either rolling over the top level menus or roll over a sublevel menu option.



Sub-menus

Sub-menus are secondary tree menus that are in the expanded tree offered on the primary menus.

Command buttons

Command buttons, located at the top of the transaction screen, represent commands for transaction screens. The following displays the most common buttons:

You can use these options to work with the data for the maintenance transaction. For more information, refer to *Chapter 2 - Using Infor SCM Warehouse Management 2000*.

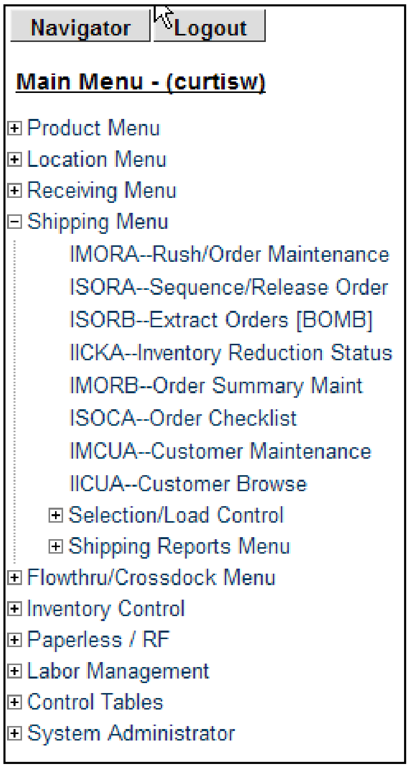
Selecting Transactions

To access a transaction screen:

- Manually select a transaction from a drop down menu

Selecting transactions from menus

You can access transaction screens from a series of menus, each consisting of a list of related transactions. These menus are organized in a drop-down manner to allow you to navigate through the various menu levels to a specific transaction. The example below shows the Shipping Main Menu.



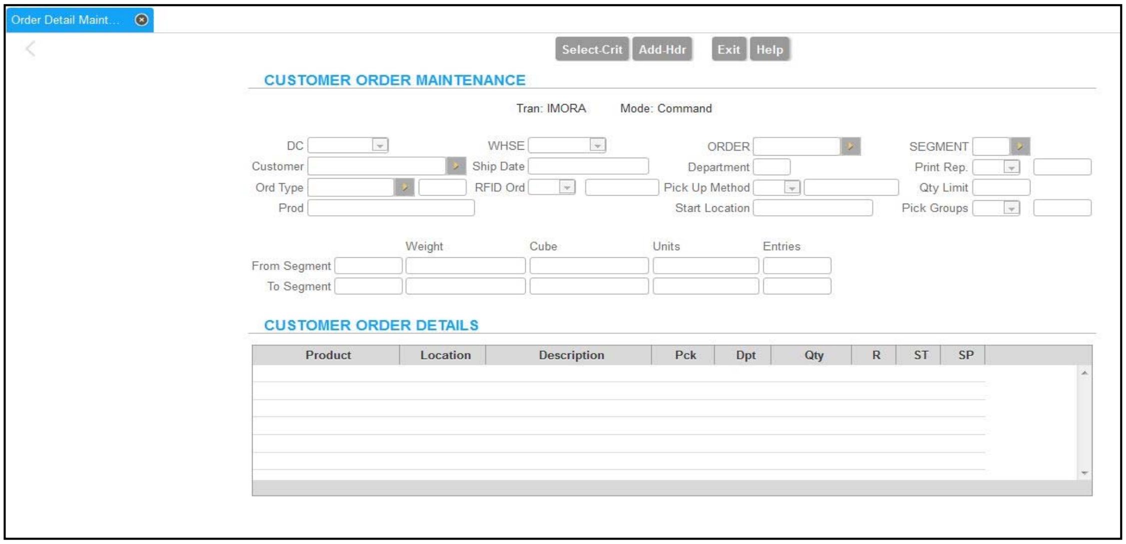
A menu displays a list of all of the transaction associated with your selection.

Selecting a transaction from the main menu

An item is current when highlighted. To select an item, you can:

- Single-click the menu item

On the Shipping Main Menu, IMORA is the transaction ID associated with the highlighted menu item *Rush/Order Maintenance.* The following screen shows a sample of the Customer Order Maintenance screen that displays when you select this transaction.



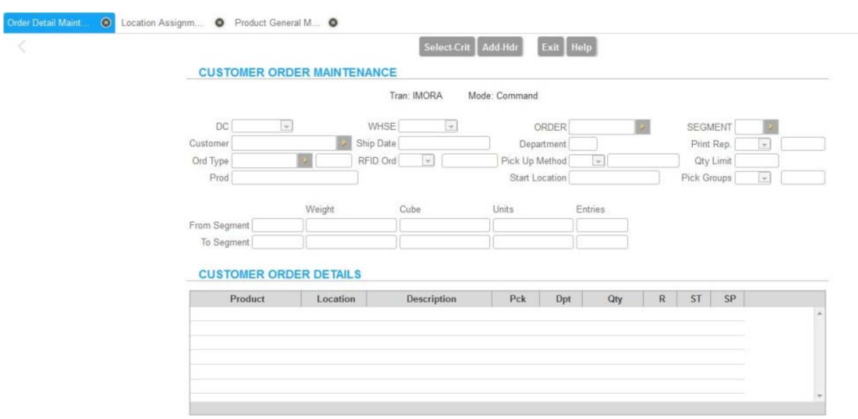
Returning to the previous menu

To return to a menu, click **Cancel or Exit**.

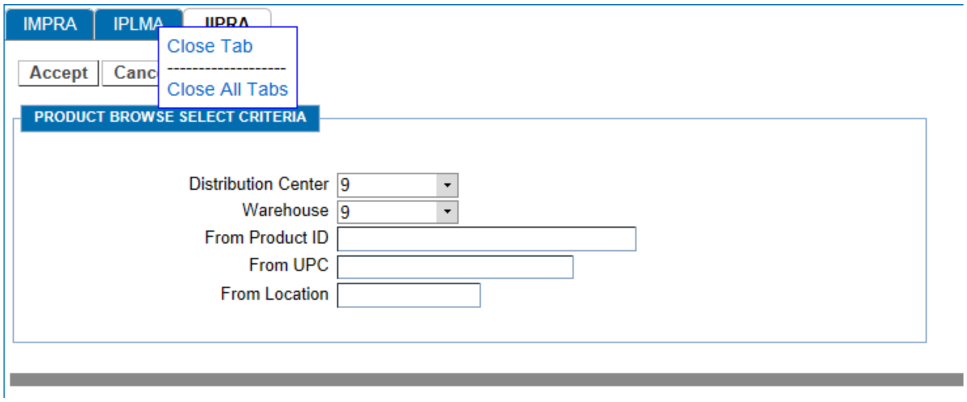
Note: To logout of the Infor SCM Warehouse Management 2000 application, click the Logout icon which is centered at the bottom of your screen.

Transaction Screens and Browser Tabs

Each time you open a new transaction screen, a new tab is displayed in the browser. These browser tabs appear in a row near the top of the display. The tab/transaction which is currently open will be highlighted. If you open enough transactions, the tabs will wrap and form a second row.



To go to a previously opened screen from your current screen, click the tab for the screen. If you exit a transaction, the tab and transaction screen will disappear.



You can close the active tab or close all the open tabs. After you select a close option, confirm your choice. If you select Close All Tabs, you return to the initial tree menu screen. You are not logged out.

Transaction screens

Transaction screens have three major sections:

- Command buttons display at the top of the screen.
- The middle of the screen displays the fields with data tied to the system database. Occasionally, data can be separated into header data and detail data.
    - Header data is usually the distribution center, warehouse, and product ID associated with a record.
    - Detail data is information such as quantity, condition code, and product description.
- The status line is located at the bottom of the screen. Prompts and error messages display in the browser's notification area.

Logging Off

To log off Infor SCM Warehouse Management 2000:

1 Click **Logout at the top of the tree menu**.

2 On the confirmation message click Y to logout of the system; click N to stayed logged in

Note: We recommend that you avoid other methods to log out. In a web browser, you can click the X close the browse or you can leave the browser open and close the application tab for WM2000. Both of these methods should be avoided because neither is a clean logout from the system. The

WM2000 processes that had been open will continue to run for some time in the background before they time out.

Chapter 2 Using Infor SCM Warehouse Management 2000

2

This section discusses functions that allow you to maintain your database information.

Editing records

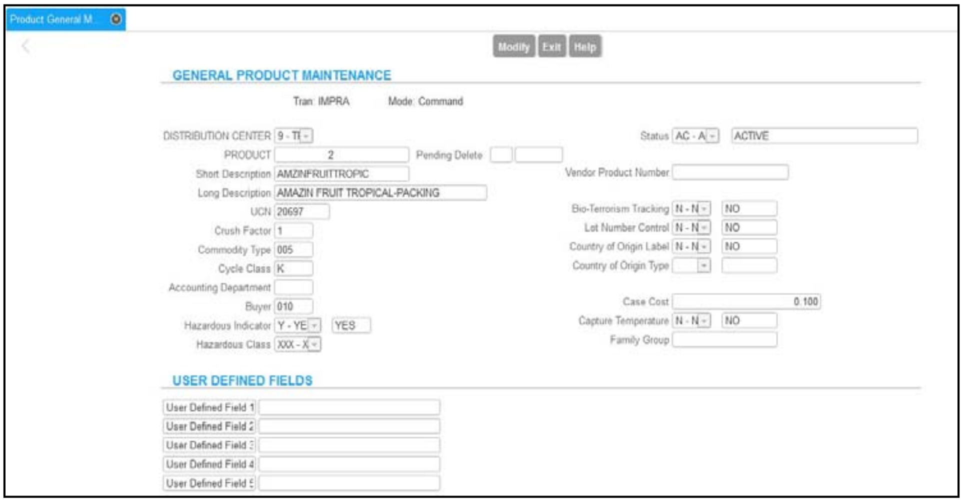
Records are the increments of data that contain information used by Infor SCM Warehouse Management 2000. System transactions allow you to pull up records based on the selection criteria you specify, such as distribution center, warehouse, product ID, and dates. Once you pull up a series of records, you can:

- Add data to a record
- Browse records
- Modify certain portions of a record
- Delete a record.

The following section describes these options.

Command buttons

You can edit a record once you access the transaction screen. Below displays a sample of the *General Product Maintenance* screen. Note the command buttons at the top of the screen.

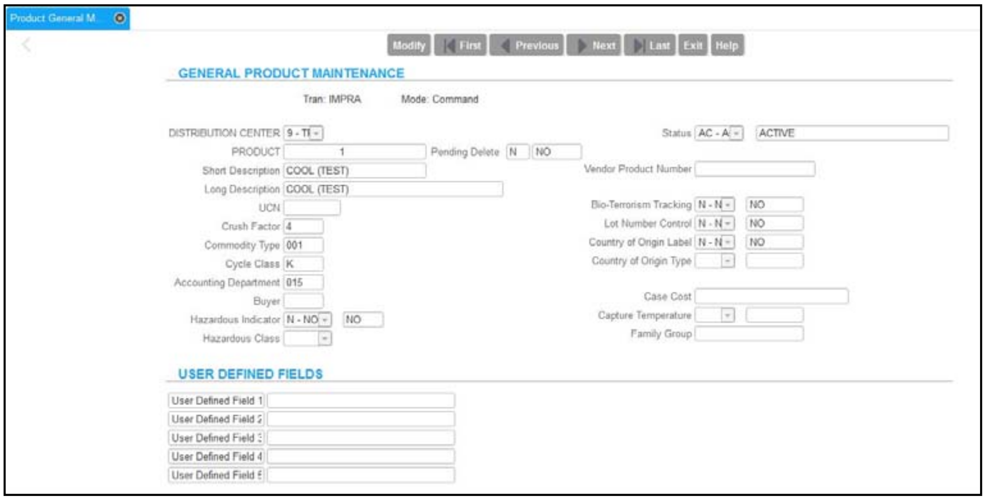


Note: After accessing the transaction, click **Cancel** to see the primary command buttons.

This command panel provides the same functionality system-wide. This includes:

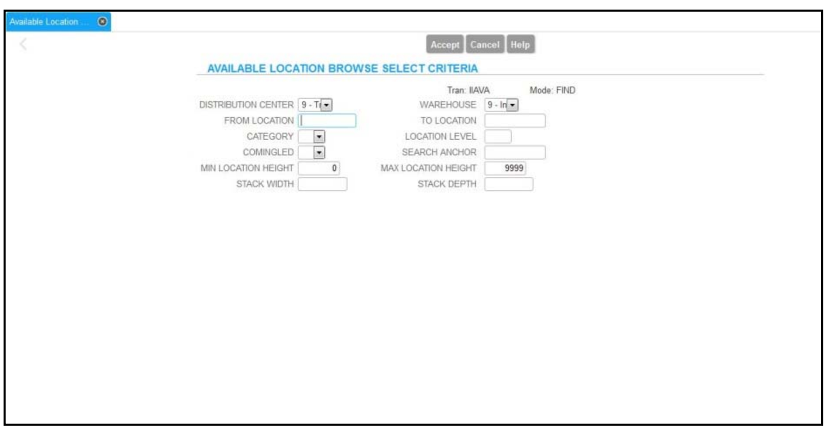
- Finding a record
- Querying the database for a record or group of records
- Adding a record
- Going to the Navigator screen directly from a transaction
- Exiting a transaction
- Accessing online Help.

If you perform a *Find* or a *Query*, a different set of command buttons display, often including a *Modify* option. You must perform a *Find* or a *Query* on a record before you can modify or delete it. Refer to the *General Product Maintenance* screen shown below. It displays when you select the *Find* menu item from the command buttons.



Executing commands using the command buttons

To execute a command from a command button, click it once.



If a specific command button, such as *Lookup* is required, a message displays at the bottom of the screen.

Note: A message specific to the field, where the cursor is located, displays additional instructions. A short description of the field or a required action displays as a message.

Editing notables

When editing system records, the following information is helpful to know:

- Some fields display default values. If the system automatically populates a field, the value is considered a default value. If you want to enter a value other than the default, type over it.
- Key field names use capital letters, making it easy for you to know which fields are key fields. Key fields are required when adding or displaying a record using the *Find* menu option.

Listing field values

Some fields require that you enter or select a value that has been pre-defined in the program. These values can be found in a list box or a screen of options that allow you to choose the data for that field.

You can make your selections by either pressing *Lookup* to select a value from a list box, or from a list of options that can be used as data for that field.

Selecting a list value

To select a value from a list box:

1 Click **Lookup** to display your options.

2 Highlight your selection.

3 Click **Accept**. The value you chose displays in the field.

In some fields, another list box displays in which you can type a specific entry, such as a vendor name. To see if the entry is contained in the database:

1 Click **Lookup**.

2 Type the entry name

3 Press **Enter**. If a match is found, it displays; if a match is not found, a list of options displays, as described above.

4 Click Cancel to exit the list without making a selection.

Notes:

- If the list is longer than the space available in the display screen, use the Arrow keys to scroll up and down through the list.
- If you enter an invalid value in a field that has a list, an error message displays. When you click *Accept* to clear the error message, the list of valid values automatically displays.

Adding records

The process of adding records is consistent, by functionality (Shipping, Receiving, and so on), from transaction to transaction. To add a record:

1. Access the transaction screen.
2. Click **Add** to begin adding a record.
3. Type the information for the record you are adding. Use the Tab key or Arrow keys to move to each field.
4. Click **Accept** to add the information to create the record. If the information you added is valid, and all the required fields are complete, a confirmation message displays.
5. If you decide that you do not want to add the record, click **Cancel** to cancel the *Add* option.

Notes:

- Occasionally, the system provides an *Add* function from the *Modify* button. This is always noted in the description of the transaction.
- If required information is missing or invalid data is entered, the system detects this as you type each field. You cannot move from one field to the next until the information you typed is validated and entered if required.
- Certain fields, such as record keys are required when you add a record. You must populate these fields before the *Add* is accepted.
- If you have done other work with this transaction screen (for example, added some other records), the screen could display field values from the last record you used.

Browsing records

The *Browse* option allows you to review data assigned to a record in the system. To browse a record:

1. Access the transaction screen.
2. Click **Browse**. The records you requested display for browsing. Navigate through the records using the scroll arrows on the right side of the screen.
3. After you finish browsing the records, click **Accept** to end the browse and return to the primary command buttons.

Displaying records

Displaying records using *Find*

The *Find* option allows you to locate a specific record matching the specified criteria. To find a record:

1 Access the transaction screen.

2 Click **Find** and type the key information about the record you want to browse. (Use the Tab key or Arrow keys to move between fields.) The names of required fields are shown in capital letters. All key fields are required.

3 Certain fields, such as Distribution Center, display default values. If you want to change the value, type over the default.

4 To display the record, click **Accept**.

Note: If no record is found with the key data you entered, the system displays a message that reads: *No Records Found*. All fields are cleared and you are returned to the primary command buttons.

Displaying records using *Query*

Query allows you to locate all of the records on the system that match the specified criteria. For example, to select all products from a particular vendor:

1 Access the transaction screen and click **Query**.

2 Provide query criteria. Use the Tab key or the Arrow keys to move between fields.

3 If you are looking for specific information, enter the selection criteria in the fields you want to query. If you choose to query all fields, leave the fields blank.

4 Click **Accept**. The first record that meets your selection criteria displays.

Notes:

- If only one record meets your selection criteria, only the one record displays.
- To avoid having too many records display at once, the system has set a limit on the number of records that can be selected.
- If you do not find the information you need in the records that display, try entering another query with different selection criteria.

The Query function offers four options that allow you to look at all selected records. These options allow you to:

- View the *First* record in the selection group
- View the *Next* record in the selection group
- View the *Previous* record in the selection group

- View the *Last* record in the selection group.

If there are no records found that match the selection criteria you entered, a message displays that reads: *No Records Found.* All fields are then cleared and you are returned to the primary command buttons.

Query selection criteria

As mentioned in the previous section, selection criteria are information the system uses to select records. The *Query* option is a very powerful tool that can provide quick and easy access to a variety of data.

The *Query* option allows you to supply an exact value, a range of values, or a list of values. Additionally, Query selection criteria screens allow you to specify wildcard characters as part of the selection criteria. The symbols you use to specify wildcards and greater than or less than other values are listed below.

Symbol	**Use in Query to specify:**
>	Greater than
<	Less than
>=	Greater than or equal
<=	Less than or equal
<>	Not equal
=	Empty field (Use = by itself in the field)
:	A range between (1:7 means 1 through 7)
|	Or (2|4|9 means 2 or 4 or 9; use to list values)
*	More than one-character wildcard
?	One-character wildcard
[ ]	List character values ([Hh] means H or h)

Wildcards

A *wildcard* is a keyboard character that represents one or many characters. The asterisk (*****), for example, represents one or more characters, and the question mark (?) represents a single character. Wildcard characters are often used in operating systems as a means of specifying more than one file by name.

For example, suppose you want to find records for all Campbell’s products. You know that some product descriptions have Campbell, some have Campbells, and others have Campbl.

From the Product Inquiry transaction on the Database Maintenance menu, type **Campb*** as the product description when you query. This tells the system to find all product records that begin with

Campb, followed by any character string. All records that contain one of the three variations of Campbell (shown above) in the beginning of the product description are located.

If you want to use a wildcard, any value, for just one character in a field, or for a specified number of characters, use a question mark (?).

Example 1

To display information about a group of locations, you can type **A1014?2** or **A1014??** for the Location ID. This query would display locations A101402, A101412, A101422, A101432, and so on, or A101400, A101401, A101402, and so on.

Example 2

Assume that you want to find all Weber products, but you are not sure whether the description in the Products database is spelled *Weber* or *weber*. Typing **Weber|weber** as the selection criteria finds all records that have either description.

Note: When you enter selection criteria, the information you type could be longer than the data entry area for that field. If this occurs, continue to type information. When you reach the end of the field, the cursor automatically repositions itself. The information you are typing is moved up to the message line, and you can continue to type your query on the message line.

Modifying Records

The process of modifying records is consistent, by functionality (Shipping, Receiving, and so on). To modify a record:

1. Access the transaction screen.
2. Use the *Find* or *Query* functions to find the record you want to modify.
3. Once the record displays, click **Modify**.
4. Type the information about the record you want to modify. (Use the Tab key or the Arrow keys to move between fields

Notes:

- The system only allows you to move to fields that can be modified.
- To modify a record, click **Accept**. If you decide that you do not want to modify the record, click **Cancel**.
- If the information you modified is valid, and all the required fields are complete, a message, such as *Record Updated* displays.
- Required fields cannot be modified. If key information needs to be changed, you must delete the existing record, and add a new record with the new key information.

- If required information is missing, or invalid data is entered, the system detects this as you type each field. You cannot move from one field to the next until the information you typed is validated and entered if required.

Deleting records

The process of deleting records is consistent by functionality (Shipping, Receiving, and so on). To delete a record:

1 Access the transaction screen.

2 Find the record to delete by using the *Find* or *Query* functions.

3 Once the record displays, click **Delete**.

4 Before the record is deleted, the system prompts you to confirm the deletion. This ensures that records are not accidentally deleted. The following message displays on the screen:

If you want to delete the record, type **Y**. If you do not want to delete the record, type **N** then click **Accept**.

Notes:

- If the record is successfully deleted, the system displays a message that reads: *Record Deleted*.
- If this record cannot be deleted, for example, because information in the record is needed by another part of the system, a message displays that reads: *Unable to Delete Record.*

Chapter 3 Command Buttons

3

This section discusses key operations you can use when working with the Infor SCM Warehouse Management 2000.

Command buttons

Many of these command buttons make data entry faster and easier.

To:	Click:
View Help Information	Help
List values for a field that has a list	Lookup
Navigate to a transaction	Navigate
Zoom from a field	Zoom
Cancel the current function without saving any adds, updates, or deletes	Cancel
Save and accept adds, updates, or deletes	Accept
Delete one item in a list of detail items	Delete
Add details	Insert
View additional details for the screen	More Details
Switch between Header and Detail area of the screen. This can affect the program functions available to the user in the action panel	Header/Detail
Add a record	Add

Chapter 4 Messages

4

Chapter 4 explains several types of messages that could display in Infor SCM Warehouse Management 2000 Message types

Error messages

There are two types of error messages, alerts and system errors.

- An alert message notifies you when you have typed an invalid entry in a field, such as an Invalid job code, or if you have typed a job code that is not in the database. This type of error allows you to correct your mistake and continue to use the system.
- A system error occurs if a problem exists with the database, and the system cannot locate a record. If you get a system error, contact your system administrator.

Error messages display on the screen. To ensure that you read all of the messages, you must click **Accept** before you can continue to work. In the example mentioned earlier about the invalid job code, a list of valid job codes display after you click **Accept**. You can move the cursor to the code you want to use and click **Accept**. The code is inserted into the field.

Informational messages

Informational messages convey an occurrence that requires no action from you. For example, *Record Added* informs you that a record you added completed successfully. Informational messages display briefly and then automatically clear from the screen.

Field prompts display briefly on the second line of the screen, and then automatically clears from the screen.

Command messages

Command messages require an action from you, such as click **Accept** or **Lookup** for a list. These messages display in the status bar at the bottom of the screen.

Note: You do not have to click Accept to continue working after informational messages, field prompts, and command messages display.

Chapter 5 Online Help

5

Infor SCM Warehouse Management 2000 has a great deal of helpful information about the system available at the click of a button:

- Transaction screen help
- Field level help

Viewing help

Follow the previously described procedures in *Chapter 1 – Accessing Infor SCM Warehouse Management 2000, Logging on to Infor SCM Warehouse Management 2000* to select a transaction screen.

Transaction screen help

Online Help at the transaction screen level provides an overview of the purpose and functionality of a transaction screen.

The primary command buttons for each transaction include a Help option. When you select Help, a screen displays general information about the transaction, such as:

- Title of the transaction.
- Available command button options.
- General description of the transaction.
- Any specific instruction(s) necessary to execute the transaction.

To access Transaction screen Help, click Help.

Field level help

Field level Help provides specific information about a field, such as a definition of the contents, and the requirements for the field. To access Field level Help, select one of the following actions:

- Use the Tab key or Arrow keys to place the cursor in the field and click Help.
- Position your cursor in the field and click Help.

The Help message displays in a format similar to Transaction screen Help. Field level Help includes a:

- Field name.
- Definition of the field.
- Description of the field.
- Valid entry or an indication of available Lookup options.

Using help

After reading the Help information, return to the transaction screen by clicking **Resume**.

If more than one screen of Help information exists, scroll to additional screens using the scroll bars at right side.

Chapter 6 Printing

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This section explains how you can print various screens when you are working with the Infor SCM Warehouse Management 2000.

Printing screens

Printing the contents of a screen

Use the browser's print functions to print screens. The Print command is located on the File menu.

For information on printing reports, refer to *Chapter 7 – Reports*.