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Deltek Costpoint Inventory Transfer

This application transfers parts between projects and has the option to use a reservation.

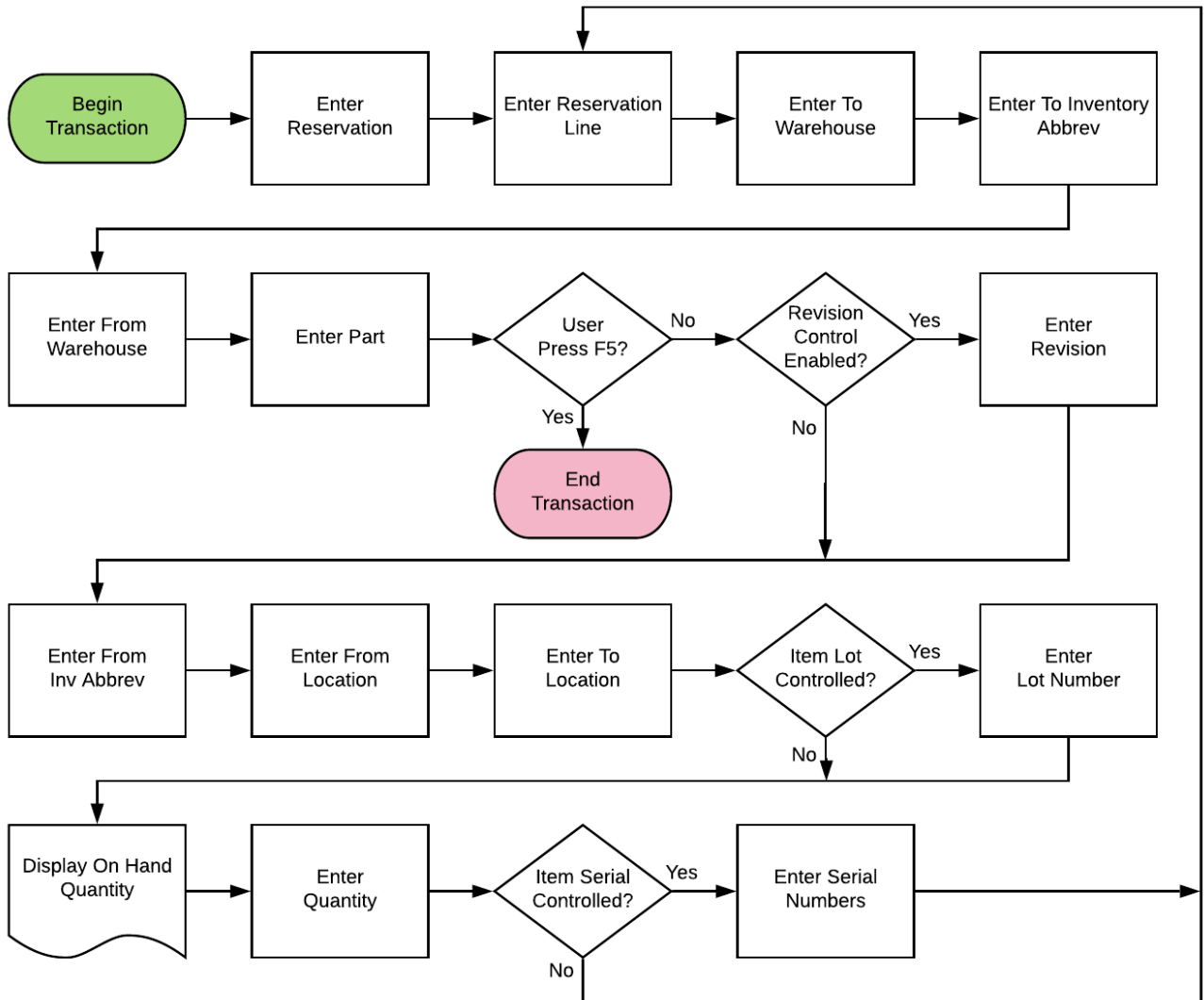


RFgen Functional Documentation 2019

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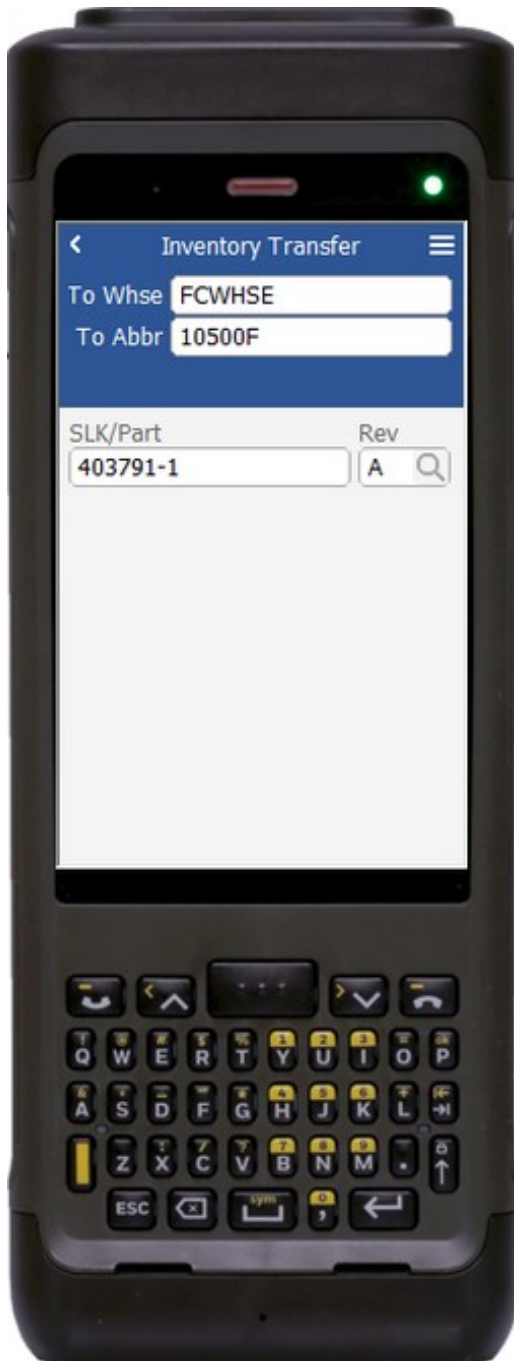
This document describes the business workflow and technical information used in this application.

Costpoint: Inventory Transfer Workflow



FIMIT0300 – Inventory Transfer

This application transfers parts between projects and has the option to use a reservation.



Description of Workflow (1 of 2)

First, if the configuration requires reservations, the user scans, searches, or enters a reservation. If reservations are not enabled, the field will not show.

The user will scan, enter, or search for a destination warehouse if one is not defaulted from the user properties. If a warehouse is defaulted, it can be changed if required.

The user scans, enters, or searches for a destination abbreviation.

If reservations are enabled, the user will scan or enter a reservation line, otherwise the field will not show.

The user scans, enters, or searches for a part. Optionally, the user could enter a Serial Lot Key value.

If the part only has one revision value, it will be auto populated, and the user taken to page 2.

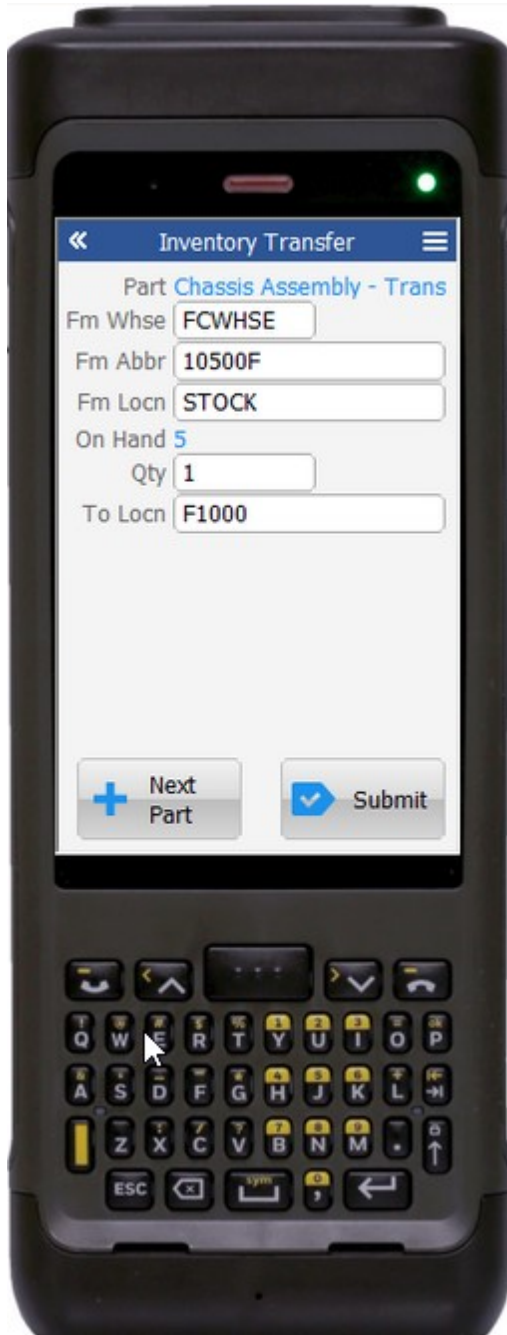
Otherwise, the user scans, searches, or enters for the part's revision.

A **Submit** button displays on page 1 if part details were entered on page 2 and after parts have been accumulated for issue. The user taps the **Submit**



button to posts the list of parts to Costpoint and restart the application.

The arrow in the upper left corner takes the user back to the menu.



Description of Workflow (2 of 2)

On page 2, the part selected from page 1 is displayed and the user is taken to the Warehouse field.

The user scans searches, or enters a From Warehouse value if one is not defaulted automatically from the user properties.

The user scans, searches, or enters a From Abbreviation.

The user scans, searches, or enters a From Location.

The on-hand quantity for that part and location display.

The user enters the quantity of the part they wish to transfer.

The user scans, searches, or enters a To Location.

If the part is lot-controlled, the user scans, searches, or enters a lot number.

Optionally, the user can enter a Serial Lot Key value. The on-hand quantity will be recalculated including the lot value and display.

The user enters the Lot Quantity. The lot quantity can be less than or equal to the total quantity to

be transferred.



If the part is serial-controlled, the user scans, searches, or enters a serial number. A counter to the right of the serial field will accumulate how many serials are entered. The focus stays in the Serial field until the same number of entries match the quantity to transfer.

If the user taps the **Next Part** button, the entered values will be stored and accumulated with other parts until the **Submit** button is tapped on either page 1 or page 2. The application will reset back to the Part or Reservation Line field.

If the user taps the **Submit** button, the application posts all the parts to Costpoint and restarts the application.

The double arrows in the upper left corner will take the user back to page 1.

Technical Information

The following describes the tables used for validation, search lists, or functions for a given prompt in this application. If applicable, the default property is also included.

Prompt	Validation / Search – Tables / Web Method	Defaults
Res	RES_HDR / RES_LN	
To Whse	WHSE	User Property "WarehouseId"
To Abbr	PART / ITEM	
ResLine	PART / ITEM	
SLK/Part	PART / ITEM / INVT_WHS_LOC_SR_LT	
Rev	PART / ITEM	
Fm Whse	WHSE	
Fm Abbr	INVT_ABBRV_CD / INVT_WHSE_LOC	
Fm Locn	WHSE_LOC / INVT_WHSE_LOC	
Qty	NA	
To Locn	WHSE_LOC	
SLK / Lot	INVT_WHS_LOC_SR_LT	
Lot Qty	NA	
Serial	INVT_WHS_LOC_SR_LT	
App Update	INMPAXFR web service	



