Deltek Costpoint - Inventory Issue to Projects

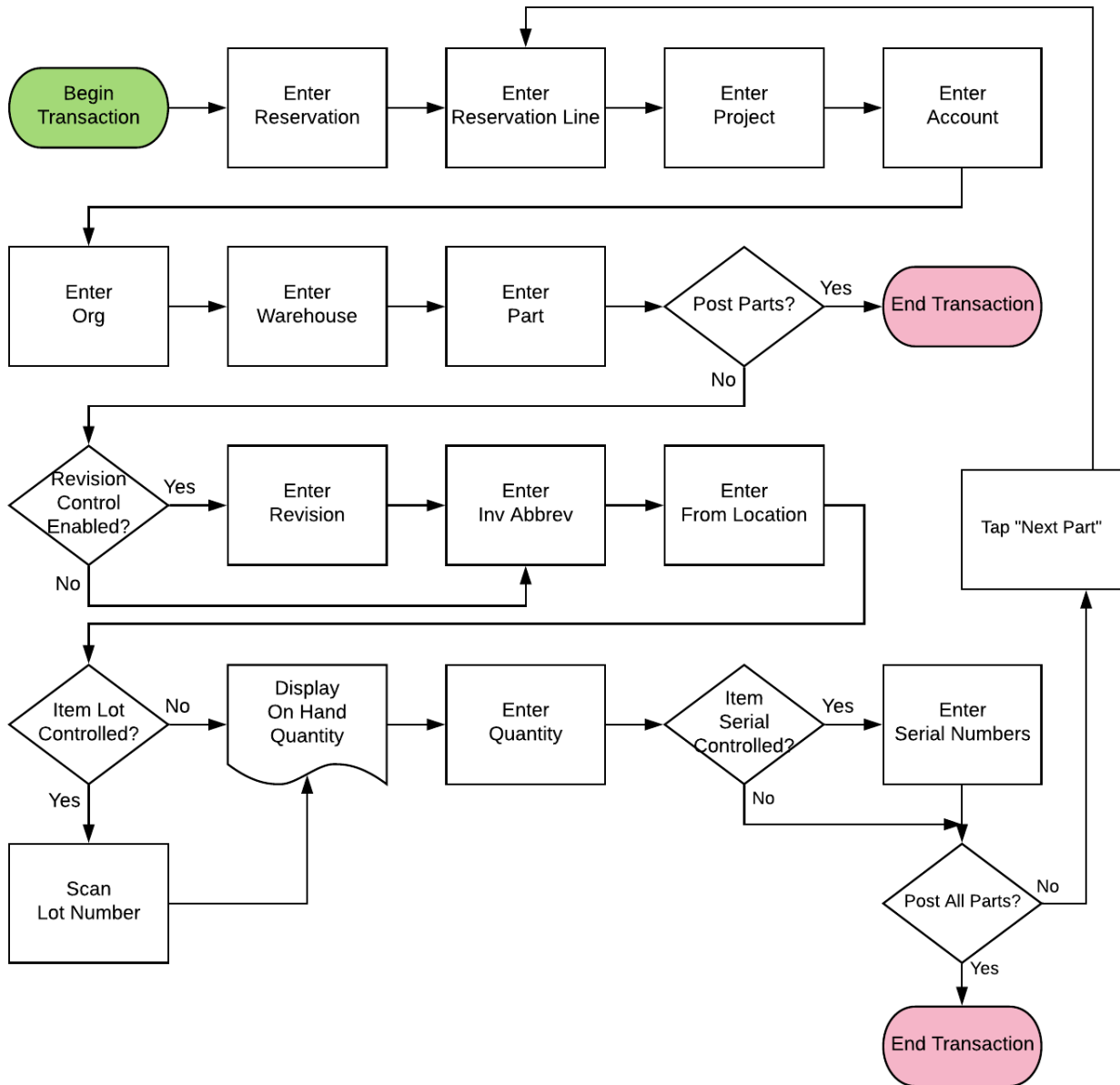This application issues parts to a project with the option of using a reservation.

RFgen Functional Documentation
2019

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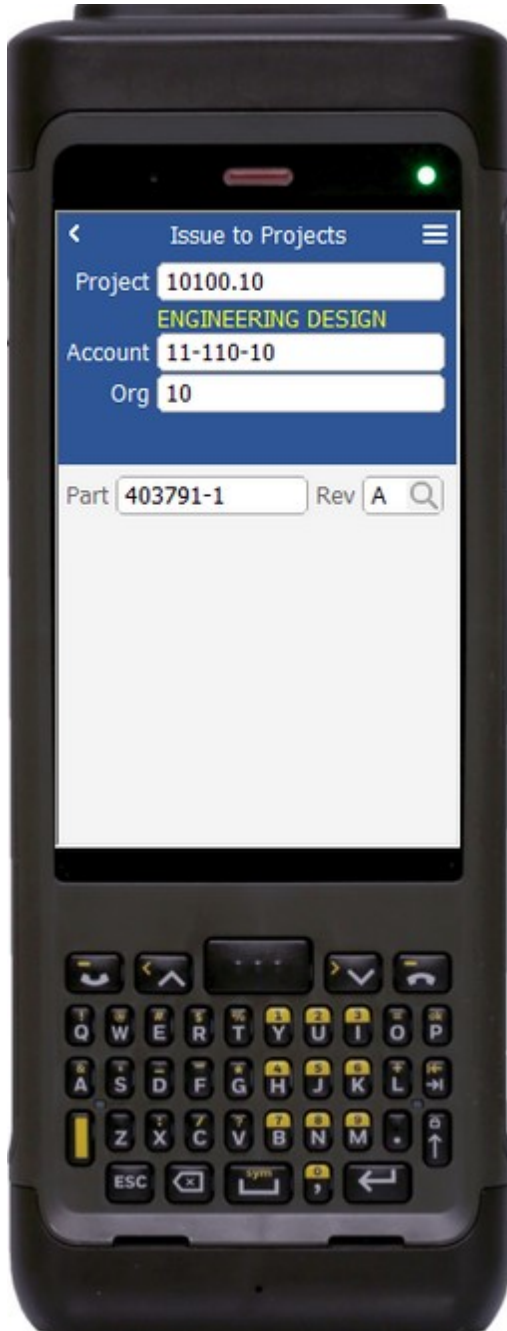
This document describes the business workflow and technical information used in this application.

Costpoint: Inventory - Issue to Projects Workflow

```
Begin Transaction → Enter Reservation → Enter Reservation Line → Enter Project → Enter Account
→ Enter Org → Enter Warehouse → Enter Part → Post Parts?
  Post Parts? --Yes--> End Transaction
  Post Parts? --No--> Revision Control Enabled?
    Revision Control Enabled? --Yes--> Enter Revision → Enter Inv Abbrev → Enter From Location
    Revision Control Enabled? --No--> Item Lot Controlled?
      Item Lot Controlled? --No--> Display On Hand Quantity
      Item Lot Controlled? --Yes--> Scan Lot Number → Display On Hand Quantity
        Display On Hand Quantity → Enter Quantity → Item Serial Controlled?
          Item Serial Controlled? --Yes--> Enter Serial Numbers
          Item Serial Controlled? --No--> Post All Parts?
            Post All Parts? --No--> Tap "Next Part"
            Post All Parts? --Yes--> End Transaction
```

FIMII0310 Inventory – Issue to Projects

This application issues parts to a project, with the option of using 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 scans, searches, or enters a project.

The user scans, searches, or enters an account.

The user scans, searches, or enters an organization.

If reservations are enabled, the user will scan, search, or enter a reservation line, otherwise the field will not show.
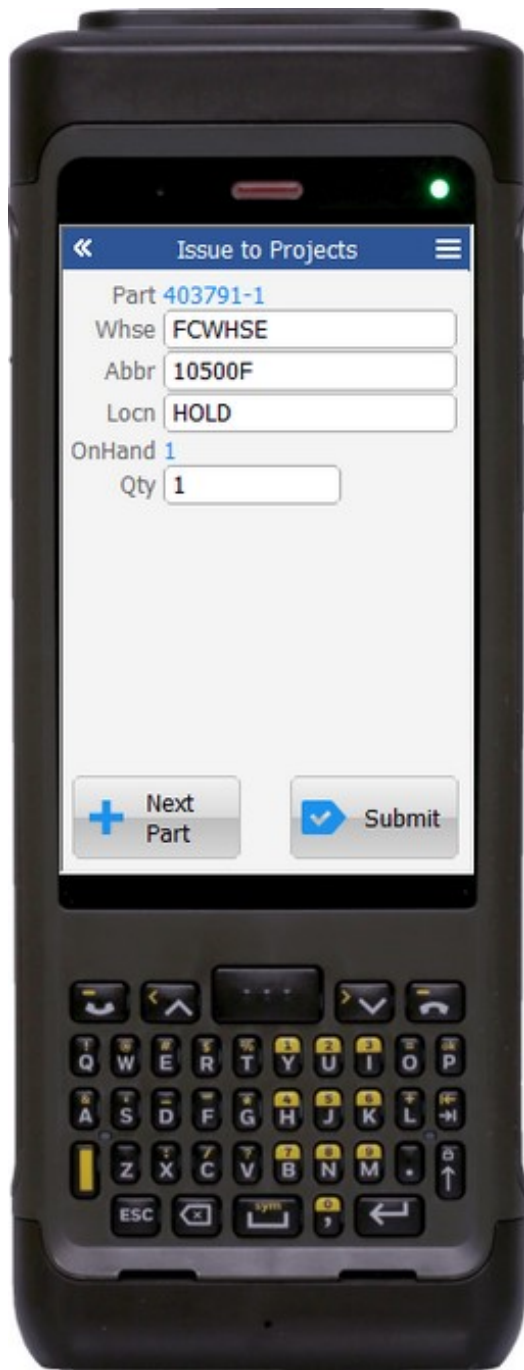
The user scans, enters, or searches for a part. If the part only has one revision value, it will be auto populated, and the user taken to page 2.

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

A **Submit** button may show on page 1 if coming back from page 2 and after accumulating parts to issue. It posts the list of parts to Costpoint and restarts the application.

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

Description of Workflow (2 of 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 warehouse value if one is not defaulted automatically from the user properties.

The user scans, searches, or enters an abbreviation.

The user scans, searches, or enters a location.

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

If the part is Lot controlled, the user scans, searches, or enters a lot number. The on-hand quantity will be recalculated including the lot value and display.

The user enters the quantity of the part they wish to issue to the project.

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 will stay in the Serial field until the same number of entries match the quantity to issue.

If the user presses **Enter** with the field blank, the application will reduce the issue quantity to the number of serials entered.

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 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	Default Property
Res	RES_HDR	
Project	PROJ	
Account	ACCT / ACCT_GRP_SETUP	
Org	ORG	
ResLine	RES_LN	
Part	PART / ITEM	
Rev	PART / ITEM	
Whse	WHSE	User Property "WarehouseId"
Abbr	PART / ITEM	
Locn	INVT_ABBRV_CD / INVT_WHSE_LOC / INVT_WHS_LOC_SR_LT	
Lot	INVT_WHS_LOC_SR_LT	
Qty	NA	
Serial	INVT_WHS_LOC_SR_LT	
App Update	INMPAISS web service	

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