

eTurns

Material staging

Help documentation



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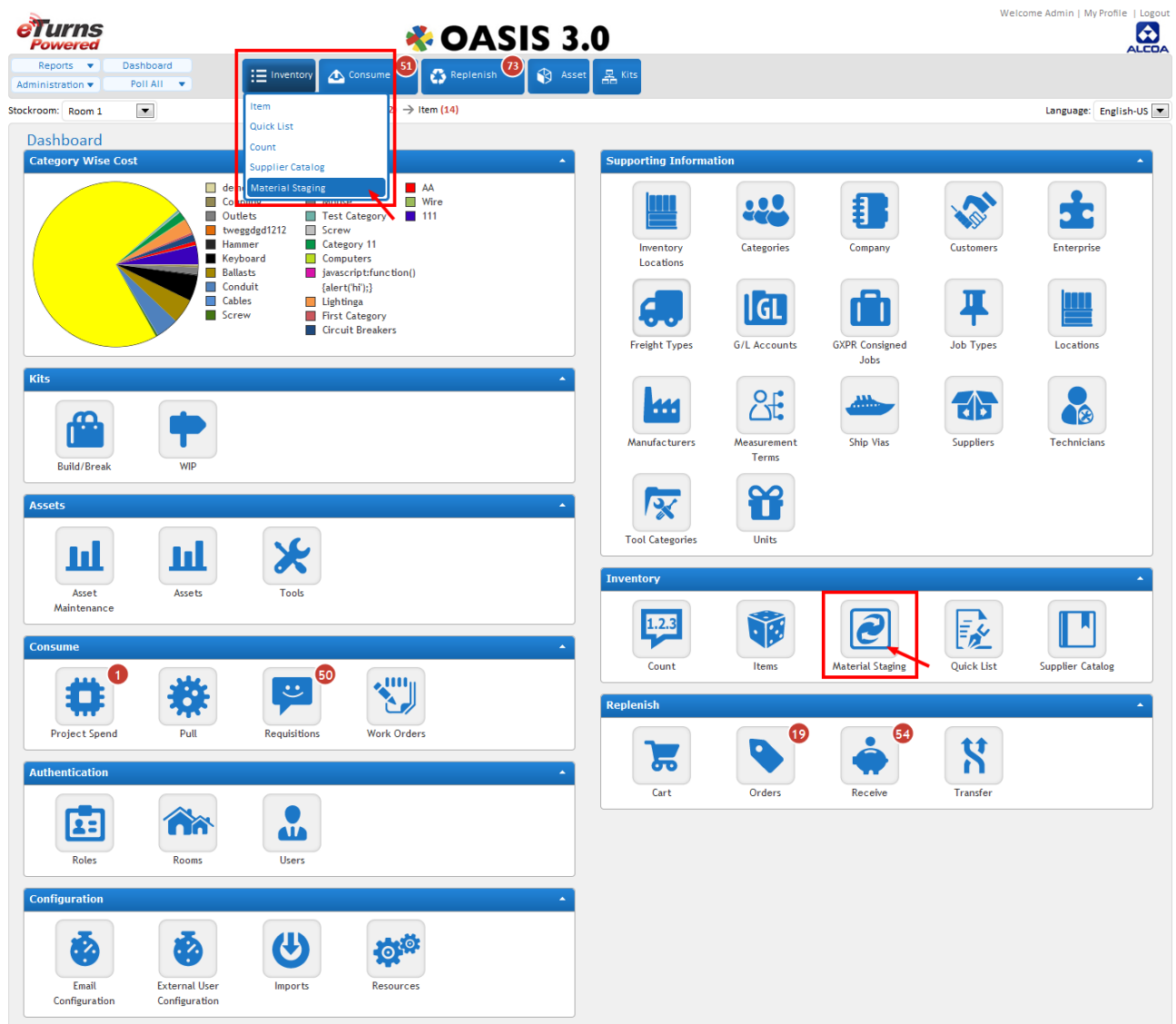
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A Material staging is used to pull items for internal working of the organization. A Material staging consists of list of items grouped together to be pulled by user having relevant authorization. General inventory resides at bin location and may eventually staged / moved to staging location using Material staging interface.

Guidelines

a. Open Material staging:

To open Material staging, user may either select Material staging from Inventory dropdown or simply click the Material staging icon listed under Inventory on Dashboard.



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Figure 1

The following page appears on screen:

OASIS 3.0

Material staging

ID	Staging Name	Description	Bin name	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By	Created By
12	staging121112121			op1	op3	1	1	1	5/2/2013 02:00:48 PM	5/2/2013 02:00:48 PM	Rock	Rock
13	Staging A		Locati M5	op1	op3	1	1	1	5/2/2013 02:51:44 PM	5/2/2013 02:51:44 PM	Rock	Rock
14	staging 23			op1	op3	1	1	1	5/2/2013 04:33:03 PM	5/2/2013 04:33:03 PM	Rock	Rock
16	abcvirat123		Staging new 1	op1	op3	1	1	1	5/3/2013 07:17:12 AM	5/3/2013 07:17:12 AM	Rock	Rock
17	DA1		here	op1	op3	1	1	1	5/3/2013 07:40:27 AM	5/3/2013 07:40:27 AM	Donald	Donald
18	Rock		test	op1	op3	7	1	1	5/3/2013 07:42:20 AM	5/3/2013 07:42:20 AM	Rock	Rock
19	DA			op1	op3	1	1	1	5/3/2013 07:42:47 AM	5/3/2013 07:42:47 AM	Donald	Donald
20	viratetest			op1	op3	1	1	1	5/3/2013 08:11:24 AM	5/3/2013 08:11:24 AM	Rock	Rock
21	Visalia		123456	op1	op3	1	1	1	5/3/2013 08:11:41 AM	5/3/2013 01:59:44 PM	Rock	Rock
22	Test		Select Staging location	op1	op3	1	1	1	5/4/2013 05:40:27 PM	5/4/2013 05:40:27 PM	Admin	Admin

Figure 2

b. Add new Item in Material staging:

To add new item in Material staging, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- Enter the particulars and hit "Save" button, then click on "Add New" button and a pop up appears on screen, displaying Add Items for Material staging grid on screen.

Material staging

New

Staging Name*

Description

Bin name

UDF1*

UDF2*

UDF3

UDF4

UDF5

*Indicates required field(s).

☒ Check before the textbox or dropdowns if you want to save this value preserved when you visit this page next time.

Figure 3

Note: As user enters Bin name, the system suggests Bin names previously stored. User may enter any suggested location or enter a new one.

Bin name

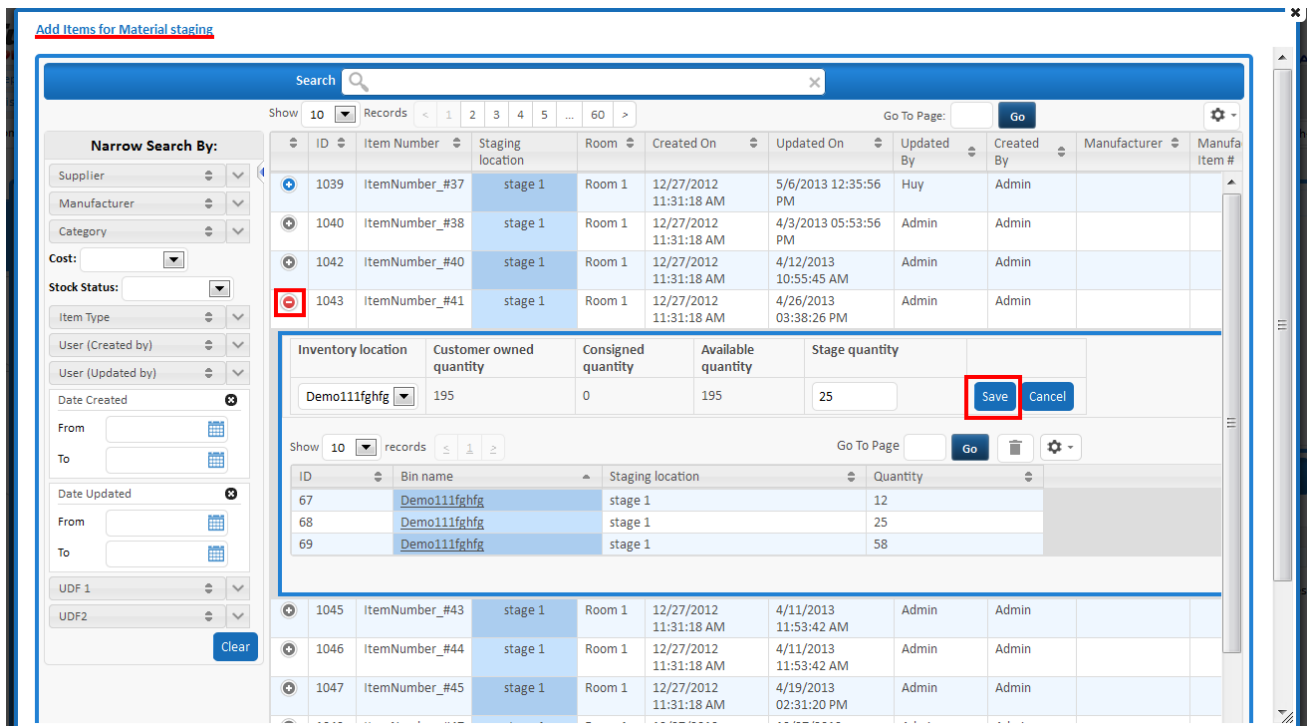
Stag

- stage 1
- Staged
- STAGED
- Staged One
- staged three
- Staged Three
- Staged Two
- Staging loc 1
- STAGING

ates required field(s).
Check before the textbox or dropdowns if

The Add Items for Material staging grid has two forms:

- When Staging location is defined: At the time of creating a new Staging name, if the user specifies the bin name for staging location, then the following screen appears:




ID	Item Number	Staging location	Room	Created On	Updated On	Updated By	Created By	Manufacturer	Manufa Item #
1039	ItemNumber_#37	stage 1	Room 1	12/27/2012 11:31:18 AM	5/6/2013 12:35:56 PM	Huy	Admin		
1040	ItemNumber_#38	stage 1	Room 1	12/27/2012 11:31:18 AM	4/3/2013 05:53:56 PM	Admin	Admin		
1042	ItemNumber_#40	stage 1	Room 1	12/27/2012 11:31:18 AM	4/12/2013 10:55:45 AM	Admin	Admin		
1043	ItemNumber_#41	stage 1	Room 1	12/27/2012 11:31:18 AM	4/26/2013 03:38:26 PM	Admin	Admin		

Inventory location	Customer owned quantity	Consigned quantity	Available quantity	Stage quantity
Demo111fghfg	195	0	195	25

ID	Bin name	Staging location	Quantity
67	Demo111fghfg	stage 1	12
68	Demo111fghfg	stage 1	25
69	Demo111fghfg	stage 1	58

Figure 4

- The above grid is displayed on screen, click on  icon of Item number to enter details for material staging.
 - Choose Inventory location from the drop down and then enter quantity to be staged in the Stage quantity text box and hit "Save".
 - The record saved is reflected in the grid below.
- When Staging location is not defined: At the time of creating a new Staging name, if the user does not specifies the bin name for staging location, then the following screen appears:
 - In this screen the Staging location appears as a Text box. User first needs to enter the Staging location, then and only then the "Expand" icon works.
 - The rest of the process is done same as mentioned above.

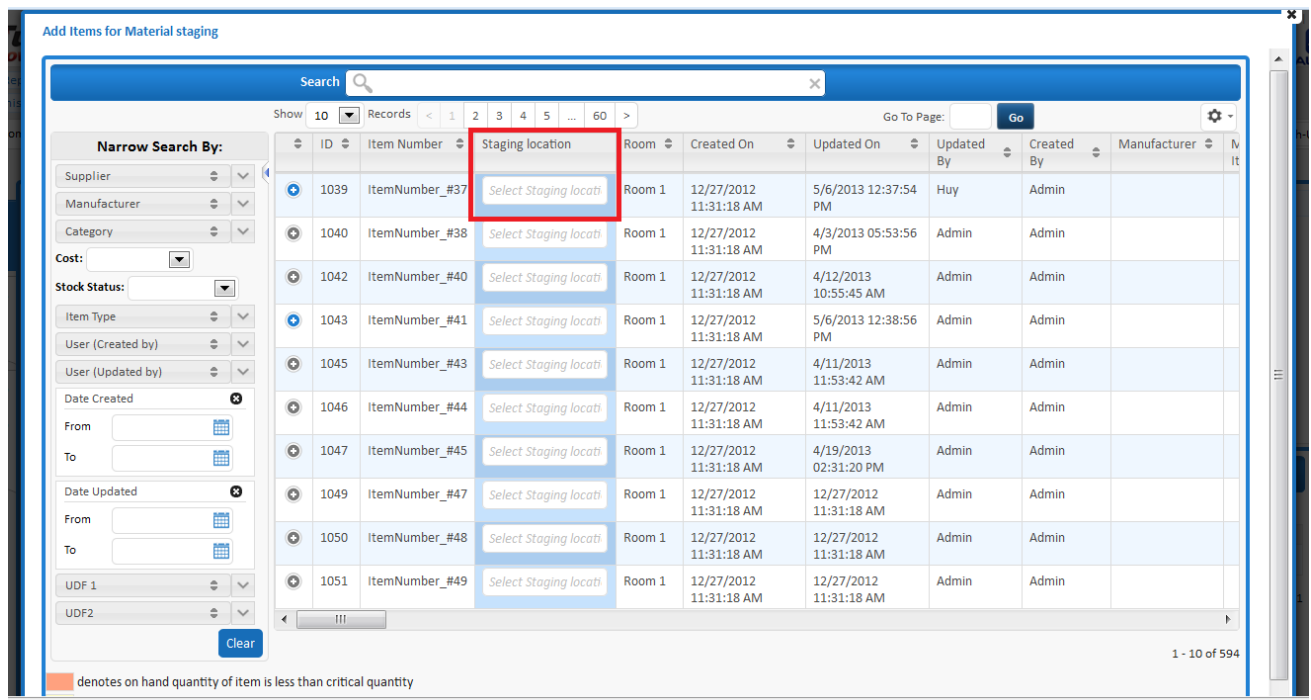



Figure 5


- The items to be viewed in the grid can be filtered by:
 - a. Supplier: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.
 - b. Manufacturer: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.
 - c. Category: This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.
 - d. Cost: This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.
 - e. Stock Status: This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.
 - f. Item Type: This filter allows filtering the type of item to be entered in the cart. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.
- Once the Close button is hit, only then the entries from the pop up grid are entered in the main New Items grid. The grid can also be closed by click on  icon.

Note: Material staging provides an option to preserve the values entered next time user visits the page, by checking the check box provided at end of new Material staging page. REFER Figure 3

c. Edit/Update Material staging:




To edit an existing Material staging record, click on the Material staging name and new screen appears on screen. The quantity limit of item may be updated; also new items can be added to project as well as deleted. To edit any item in list the user must have the required authorization.

d. Delete a record:

To delete a record, select it and then click on Delete icon  or press Delete key on your keyboard. The user may also delete the selected or multiple records. A pop up verifies your selection and then deletes the selected records.

Material staging

Search

Show 10 Records < 1 2 > Go To Page: Go   

ID	Staging Name	Description	Bin name	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By	Created By
12	staging121112121			op1	op3	1	1	1	5/2/2013 02:00:48 PM	5/2/2013 02:00:48 PM	Rock	Rock
13	Staging A		Locati M5	op1	op3	1	1	1	5/2/2013 02:51:44 PM	5/2/2013 02:51:44 PM	Rock	Rock
14	staging 23			op1	op3	1	1	1	5/2/2013 04:33:03 PM	5/2/2013 04:33:03 PM	Rock	Rock
16	abcvirat123		Staging new 1	op1	op3	1	1	1	5/3/2013 07:17:12 AM	5/3/2013 07:17:12 AM	Rock	Rock
17	DA1		here	op1	op3	1	1	1	5/3/2013 07:40:27 AM	5/3/2013 07:40:27 AM	Donald	Donald
18	Rock		test	op1	op3	7	1	1	5/3/2013 07:42:20 AM	5/3/2013 07:42:20 AM	Rock	Rock
19	DA			op1	op3	1	1	1	5/3/2013 07:42:47 AM	5/3/2013 07:42:47 AM	Donald	Donald
20	viratetest			op1	op3	1	1	1	5/3/2013 08:11:24 AM	5/3/2013 08:11:24 AM	Rock	Rock
21	Visalia		123456	op1	op3	1	1	1	5/3/2013 08:11:41 AM	5/3/2013 01:59:44 PM	Rock	Rock
22	Test		Select Staging location	op1	op3	1	1	1	5/4/2013 05:40:27 PM	5/4/2013 05:40:27 PM	Admin	Admin

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Figure 6




e. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- Print: It prints the selected page.
- Excel: It converts the page to excel sheet.
- CSV: It converts the page to CSV sheet.
- PDF: It converts the page to PDF document.
- Copy: It copies the page to Clipboard.

Material staging

Search

Show 10 Records < 1 2 > Go To Page: Go   

ID	Staging Name	Description	Bin name	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By	Created By
12	staging121112121			op1	op3	1	1	1	5/2/2013 02:00:48 PM	5/2/2013 02:00:48 PM	Rock	Rock
13	Staging A		Locati M5	op1	op3	1	1	1	5/2/2013 02:51:44 PM	5/2/2013 02:51:44 PM	Rock	Rock
14	staging 23			op1	op3	1	1	1	5/2/2013 04:33:03 PM	5/2/2013 04:33:03 PM	Rock	Rock
16	abcvirat123		Staging new 1	op1	op3	1	1	1	5/3/2013 07:17:12 AM	5/3/2013 07:17:12 AM	Rock	Rock
17	DA1		here	op1	op3	1	1	1	5/3/2013 07:40:27 AM	5/3/2013 07:40:27 AM	Donald	Donald
18	Rock		test	op1	op3	7	1	1	5/3/2013 07:42:20 AM	5/3/2013 07:42:20 AM	Rock	Rock
19	DA			op1	op3	1	1	1	5/3/2013 07:42:47 AM	5/3/2013 07:42:47 AM	Donald	Donald
20	viratetest			op1	op3	1	1	1	5/3/2013 08:11:24 AM	5/3/2013 08:11:24 AM	Rock	Rock
21	Visalia		123456	op1	op3	1	1	1	5/3/2013 08:11:41 AM	5/3/2013 01:59:44 PM	Rock	Rock
22	Test		Select Staging location	op1	op3	1	1	1	5/4/2013 05:40:27 PM	5/4/2013 05:40:27 PM	Admin	Admin

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Print
Excel
CSV
PDF
Copy

Figure 7

f. View change log:

To view the updated history of a Material staging, select the Material staging and click on Change log tab. It displays when the Material staging was created and the number of times it was updated.

Workorders

New

List

Change Log

History ID	ID	Action	Name	Status	Technician	Customer	Asset Name	Tool	Item Used	Total Cost	Created	Updated	Room	Created On	Updated On	UDF1	UDF2	UDC
35	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	8	1000	4/19/2013 04:36:41 PM	4/20/2013 03:34:55 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
31	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	9	820	4/19/2013 04:36:41 PM	4/20/2013 03:32:32 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
11	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	10	190	4/19/2013 04:36:41 PM	4/20/2013 12:48:07 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
10	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	10	190	4/19/2013 04:36:41 PM	4/20/2013 12:47:29 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
9	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	10	190	4/19/2013 04:36:41 PM	4/20/2013 12:47:11 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
8	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/20/2013 12:40:46 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
7	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/20/2013 12:25:08 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
6	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/20/2013 12:17:37 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
5	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/20/2013 12:14:09 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
4	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/20/2013 12:12:13 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
3	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/20/2013 12:12:01 PM	Room 1	Rock	Rock	adfsadfsa	WO2	
2	13	update	new Pull Test Update	Open	Computer Operator	alida	Lenovo Monitor	New Tool Testing	0	0	4/19/2013 04:36:41 PM	4/19/2013 06:42:56 PM	Room 1	Rock	Rock	adfsadfsa	WO2	

Figure 8

Note: The Change log is displayed in View only mode.

g. Search Material staging for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

- Main Search: To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

Material staging




New

History

Search

Show 10 Records < 1 2 >

Go To Page:




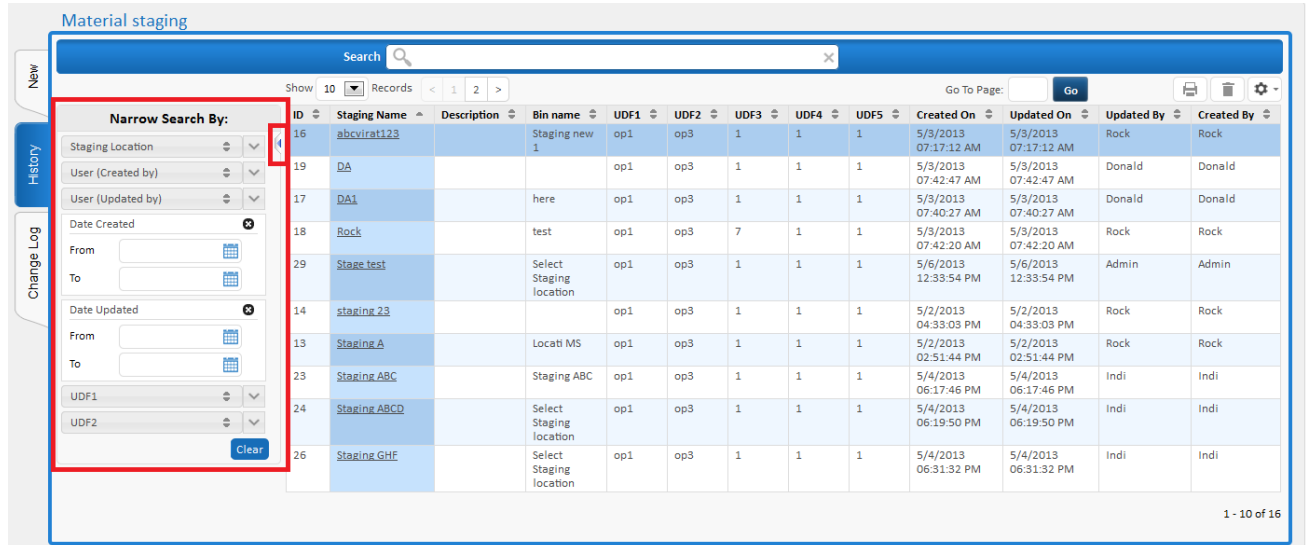
ID	Staging Name	Description	Bin name	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By	Created By
12	staging121112121			op1	op3	1	1	1	5/2/2013 02:00:48 PM	5/2/2013 02:00:48 PM	Rock	Rock
13	Staging A		Locati MS	op1	op3	1	1	1	5/2/2013 02:51:44 PM	5/2/2013 02:51:44 PM	Rock	Rock
14	staging 23			op1	op3	1	1	1	5/2/2013 04:33:03 PM	5/2/2013 04:33:03 PM	Rock	Rock
16	abcvirat123		Staging new 1	op1	op3	1	1	1	5/3/2013 07:17:12 AM	5/3/2013 07:17:12 AM	Rock	Rock
17	DA1		here	op1	op3	1	1	1	5/3/2013 07:40:27 AM	5/3/2013 07:40:27 AM	Donald	Donald
18	Rock		test	op1	op3	7	1	1	5/3/2013 07:42:20 AM	5/3/2013 07:42:20 AM	Rock	Rock
19	DA			op1	op3	1	1	1	5/3/2013 07:42:47 AM	5/3/2013 07:42:47 AM	Donald	Donald
20	viratitest			op1	op3	1	1	1	5/3/2013 08:11:24 AM	5/3/2013 08:11:24 AM	Rock	Rock
21	Visalia		123456	op1	op3	1	1	1	5/3/2013 08:11:41 AM	5/3/2013 01:59:44 PM	Rock	Rock
22	Test		Select Staging location	op1	op3	1	1	1	5/4/2013 05:40:27 PM	5/4/2013 05:40:27 PM	Admin	Admin

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Figure 9

ii. Narrow Search by: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

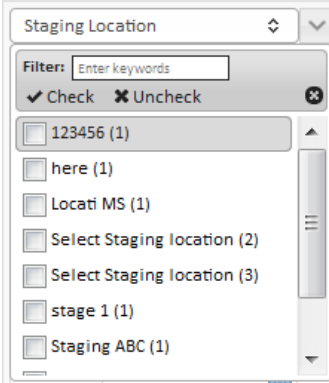
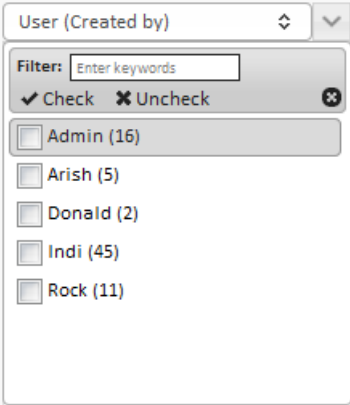
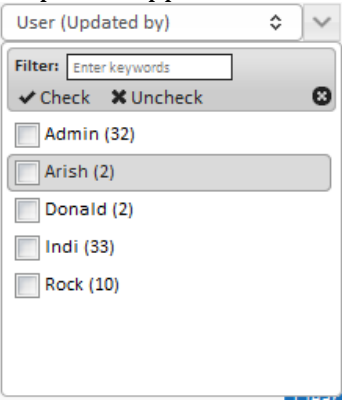

- To open Narrow search, click on the small Triangular icon  on the top left corner of the screen.
- The following screen appears:



The screenshot displays the 'Material staging' application interface. On the left, a sidebar contains buttons for 'New', 'History', and 'Change Log'. The main area features a 'Narrow Search By' sidebar (highlighted with a red box) with filters for Staging Location, User (Created by), User (Updated by), Date Created, Date Updated, UDF1, and UDF2. A 'Clear' button is at the bottom of this sidebar. The main table has columns: ID, Staging Name, Description, Bin name, UDF1, UDF2, UDF3, UDF4, UDF5, Created On, Updated On, Updated By, and Created By. The table contains 10 rows of data. At the bottom right, it shows '1 - 10 of 16'.

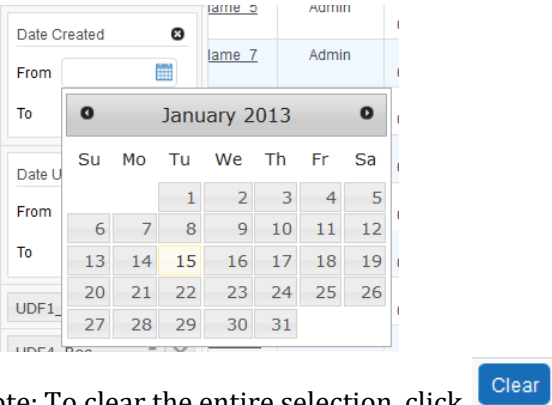
ID	Staging Name	Description	Bin name	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By	Created By
16	abcvrat123		Staging new 1	op1	op3	1	1	1	5/3/2013 07:17:12 AM	5/3/2013 07:17:12 AM	Rock	Rock
19	DA			op1	op3	1	1	1	5/3/2013 07:42:47 AM	5/3/2013 07:42:47 AM	Donald	Donald
17	DA1		here	op1	op3	1	1	1	5/3/2013 07:40:27 AM	5/3/2013 07:40:27 AM	Donald	Donald
18	Rock		test	op1	op3	7	1	1	5/3/2013 07:42:20 AM	5/3/2013 07:42:20 AM	Rock	Rock
29	Stage test	Select Staging location		op1	op3	1	1	1	5/6/2013 12:33:54 PM	5/6/2013 12:33:54 PM	Admin	Admin
14	staging 23			op1	op3	1	1	1	5/2/2013 04:33:03 PM	5/2/2013 04:33:03 PM	Rock	Rock
13	Staging A	Locati MS		op1	op3	1	1	1	5/2/2013 02:51:44 PM	5/2/2013 02:51:44 PM	Rock	Rock
23	Staging ABC	Staging ABC		op1	op3	1	1	1	5/4/2013 06:17:46 PM	5/4/2013 06:17:46 PM	Indi	Indi
24	Staging ABCD	Select Staging location		op1	op3	1	1	1	5/4/2013 06:19:50 PM	5/4/2013 06:19:50 PM	Indi	Indi
26	Staging GHF	Select Staging location		op1	op3	1	1	1	5/4/2013 06:31:32 PM	5/4/2013 06:31:32 PM	Indi	Indi

Figure 10

Field	Description
Staging Location	<p>It is used to filter the module in accordance to the Staging Location of an item. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the location of the list using Check or Uncheck button. The module reflects the filter selections made.</p>
User Created by	<p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>
User Updated by	<p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made.</p> <p>Dropdown appears:</p>  <p>Note: To cancel the selections made at any point of time, click .</p>

Date Created and Date Updated

They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.



Note: To clear the entire selection, click Clear

Note: At point of time only one of the either searches will work.

h. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click "Go".

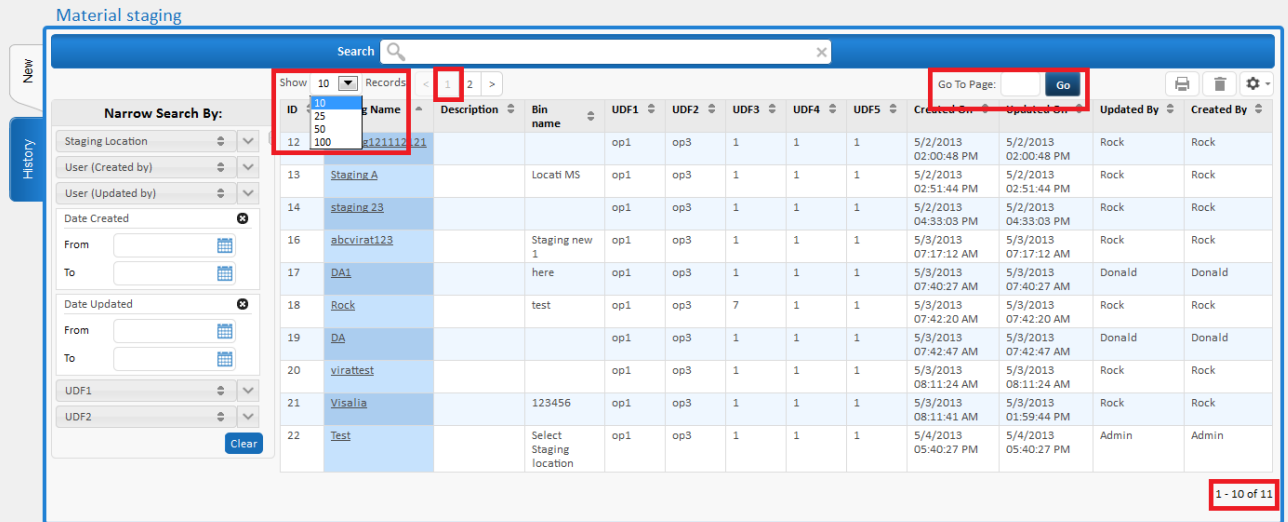


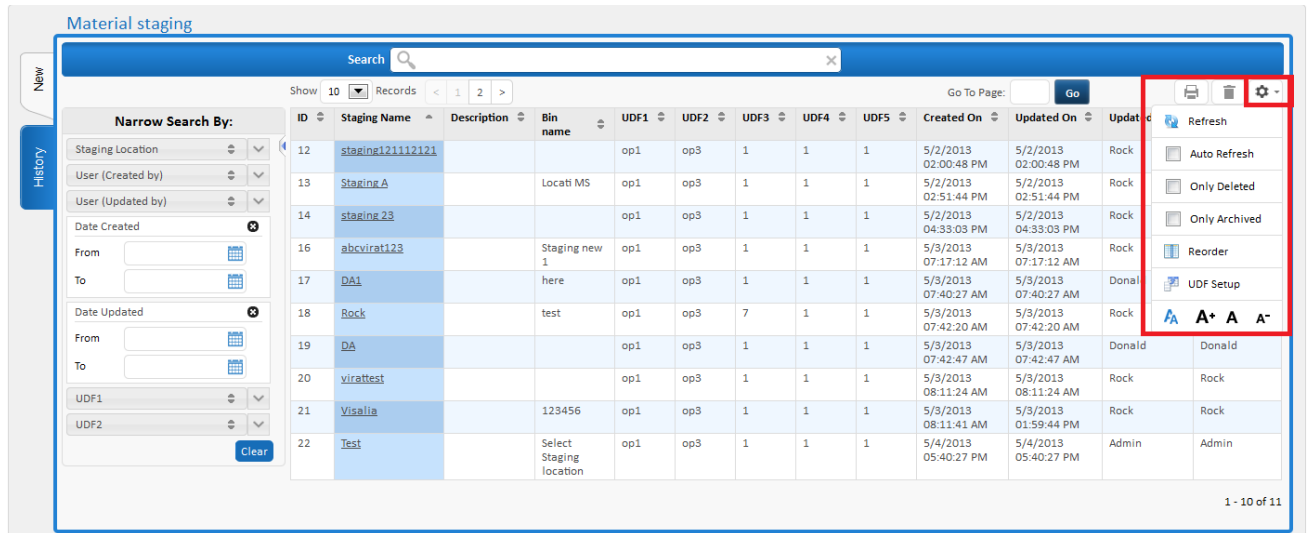
Figure 11

i. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

- Refresh: This option refreshes the module and displays the latest changes implemented.
- Auto Refresh: This option automatically refreshes the screen in specified time.
- Only Deleted: This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.
- Only Archived: This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.
- Reorder: This option enables user to reorder the columns of the module.
 - User can also select which field to appear on screen and which remains to be hidden.

- Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
- User may also drag and drop fields to be arranged in order of choice.
- After the selection is completed, click “Reorder”.



ID	Staging Name	Description	Bin name	UDF1	UDF2	UDF3	UDF4	UDF5	Created On	Updated On	Updated By
12	staging121112121			op1	op3	1	1	1	5/2/2013 02:00:48 PM	5/2/2013 02:00:48 PM	Rock
13	Staging A		Locati MS	op1	op3	1	1	1	5/2/2013 02:51:44 PM	5/2/2013 02:51:44 PM	Rock
14	staging 23			op1	op3	1	1	1	5/2/2013 04:33:03 PM	5/2/2013 04:33:03 PM	Rock
16	abcvirat123		Staging new 1	op1	op3	1	1	1	5/3/2013 07:17:12 AM	5/3/2013 07:17:12 AM	Rock
17	DA1	here		op1	op3	1	1	1	5/3/2013 07:40:27 AM	5/3/2013 07:40:27 AM	Donald
18	Rock	test		op1	op3	7	1	1	5/3/2013 07:42:20 AM	5/3/2013 07:42:20 AM	Rock
19	DA			op1	op3	1	1	1	5/3/2013 07:42:47 AM	5/3/2013 07:42:47 AM	Donald
20	viratetest			op1	op3	1	1	1	5/3/2013 08:11:24 AM	5/3/2013 08:11:24 AM	Rock
21	Visalia		123456	op1	op3	1	1	1	5/3/2013 08:11:41 AM	5/3/2013 01:59:44 PM	Rock
22	Test	Select Staging location		op1	op3	1	1	1	5/4/2013 05:40:27 PM	5/4/2013 05:40:27 PM	Admin

Figure 12

j. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing

Multi selection of rows by clicking each row