eTurns

Material staging Help documentation



Contents

Guide	Guidelines2		
	Open Material staging		
b.	Add new Item in Material staging		
c.	Edit/Update Material staging		
d.	Delete a record:		
e.	Export the page:	6	
f.	View change log	7	
g.	Search Material staging for keyword:	7	
h.	View records and Go to specific page:	10	
i.	Implement various settings	10	
i	Miscellaneous settings	11	



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.

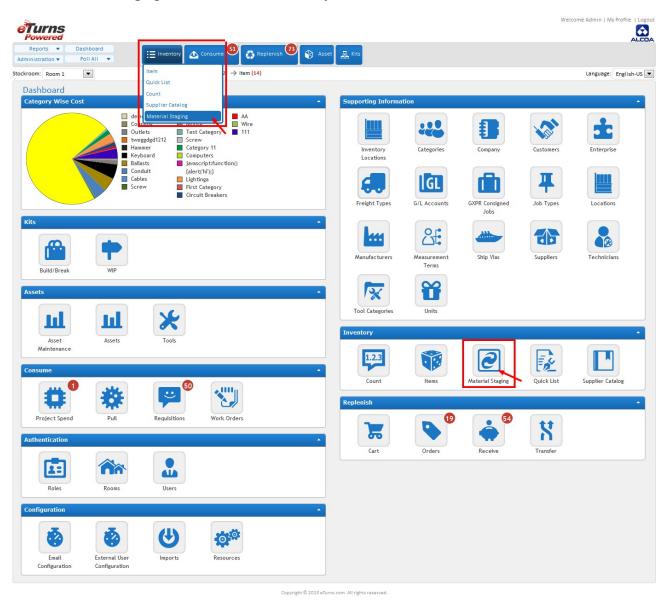


Figure 1



The following page appears on screen:

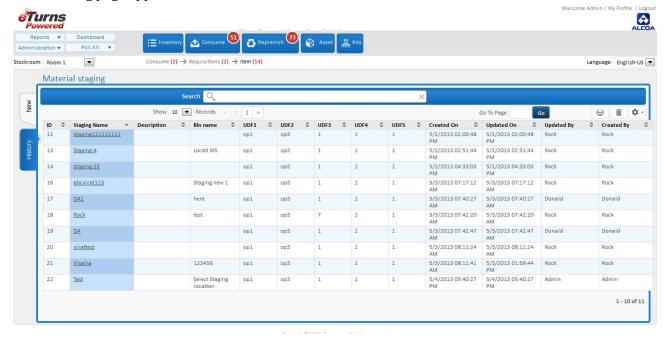


Figure 2

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.

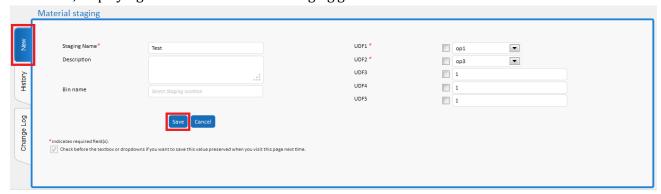


Figure 3

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





The Add Items for Material staging grid has two forms:

i. <u>When Staging location is defined</u>: At the time of creating a new Staging name, if the user specifies the bin name for staging location, then the following screen appears:

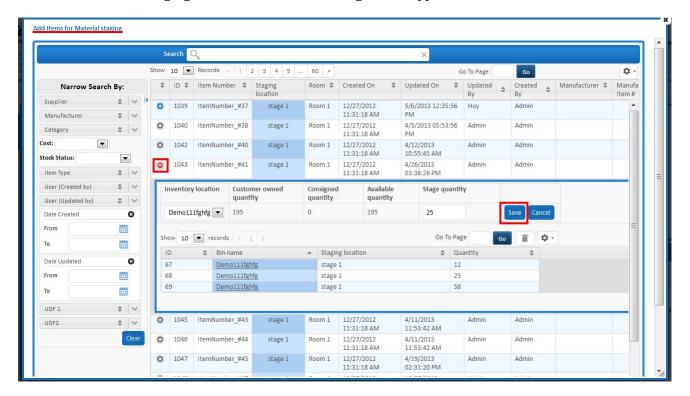


Figure 4

- The above grid is displayed on screen, click on 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.
- ii. <u>When Staging location is not defined</u>: 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.



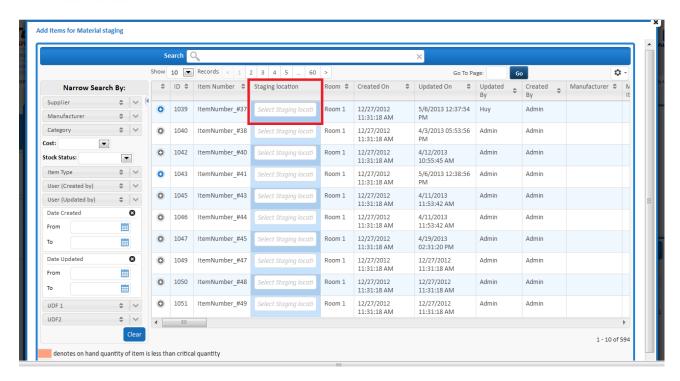


Figure 5

- The items to be viewed in the grid can be filtered by:
- a. <u>Supplier</u>: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.
- b. <u>Manufacturer</u>: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.
- c. <u>Category</u>: 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. <u>Cost</u>: 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. <u>Stock Status</u>: 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. <u>Item Type</u>: 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.

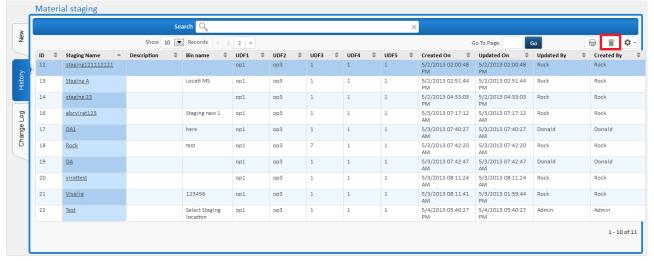


Figure 6

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:

- a) Print: It prints the selected page.
- b) Excel: It converts the page to excel sheet.
- c) CSV: It converts the page to CSV sheet.
- d) PDF: It converts the page to PDF document.
- e) Copy: It copies the page to Clipboard.

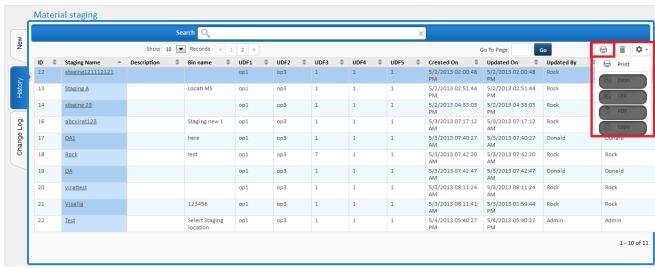


Figure 7



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.



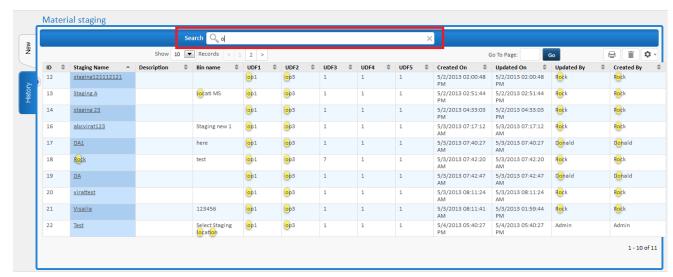
Figure 8

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:

i. 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.



Copyright © 2013 eTurns.com. All rights reserve

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:

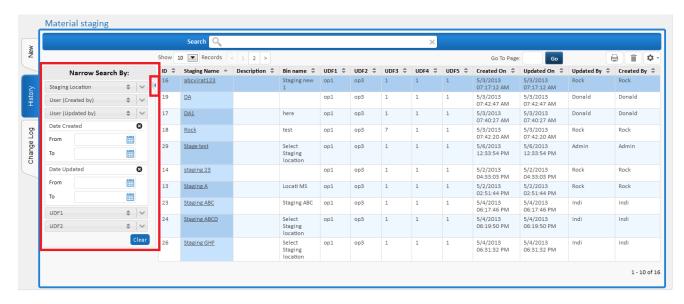
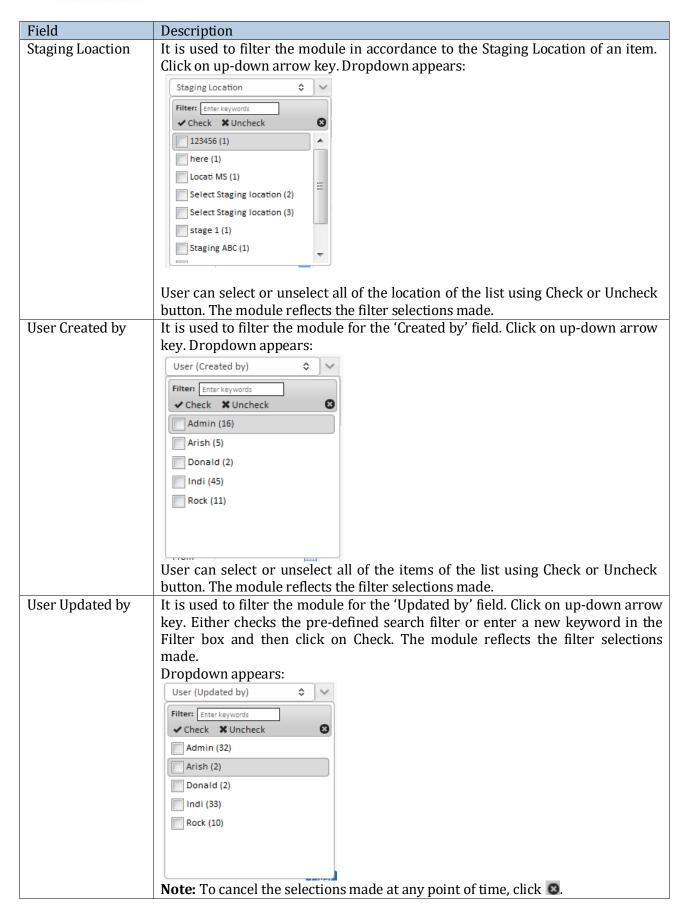


Figure 10







Date Created and They are used to filter the 'Created On' and 'Updated On' fields respectively. Date Updated 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. Date Created 8 lame 7 Admin From То January 2013 Tu Мо We Th Fr Su Date U From 9 10 11 12 То 13 15 16 17 18 19 20 21 22 23 24 25 UDF1 28 27 29 30 31 Clear Note: To clear the entire selection, click

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".

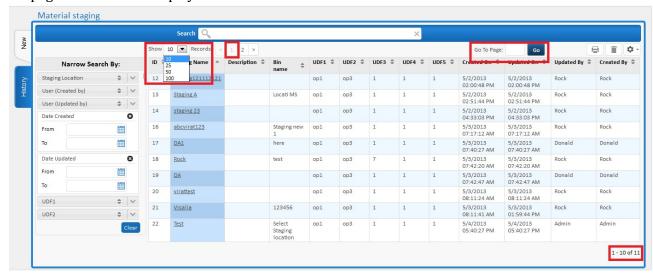


Figure 11

i. Implement various settings:

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

- a) Refresh: This option refreshes the module and displays the latest changes implemented.
- b) Auto Refresh: This option automatically refreshes the screen in specified time.
- c) 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.
- d) 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.
- e) 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".

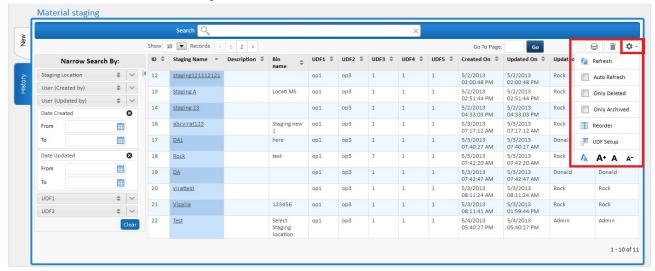


Figure 12

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