

eTurns

# Pulls

Help documentation



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Pulls as the name suggests is used to pull or take single or multiple entity of an item from the inventory system. One can also credit back items taken from inventory, back at particular place.

## Guidelines

### a. Open Pulls:

To open pulls, user may either select Pulls from Consume dropdown or simply click the Pulls icon listed under Consume on Dashboard.

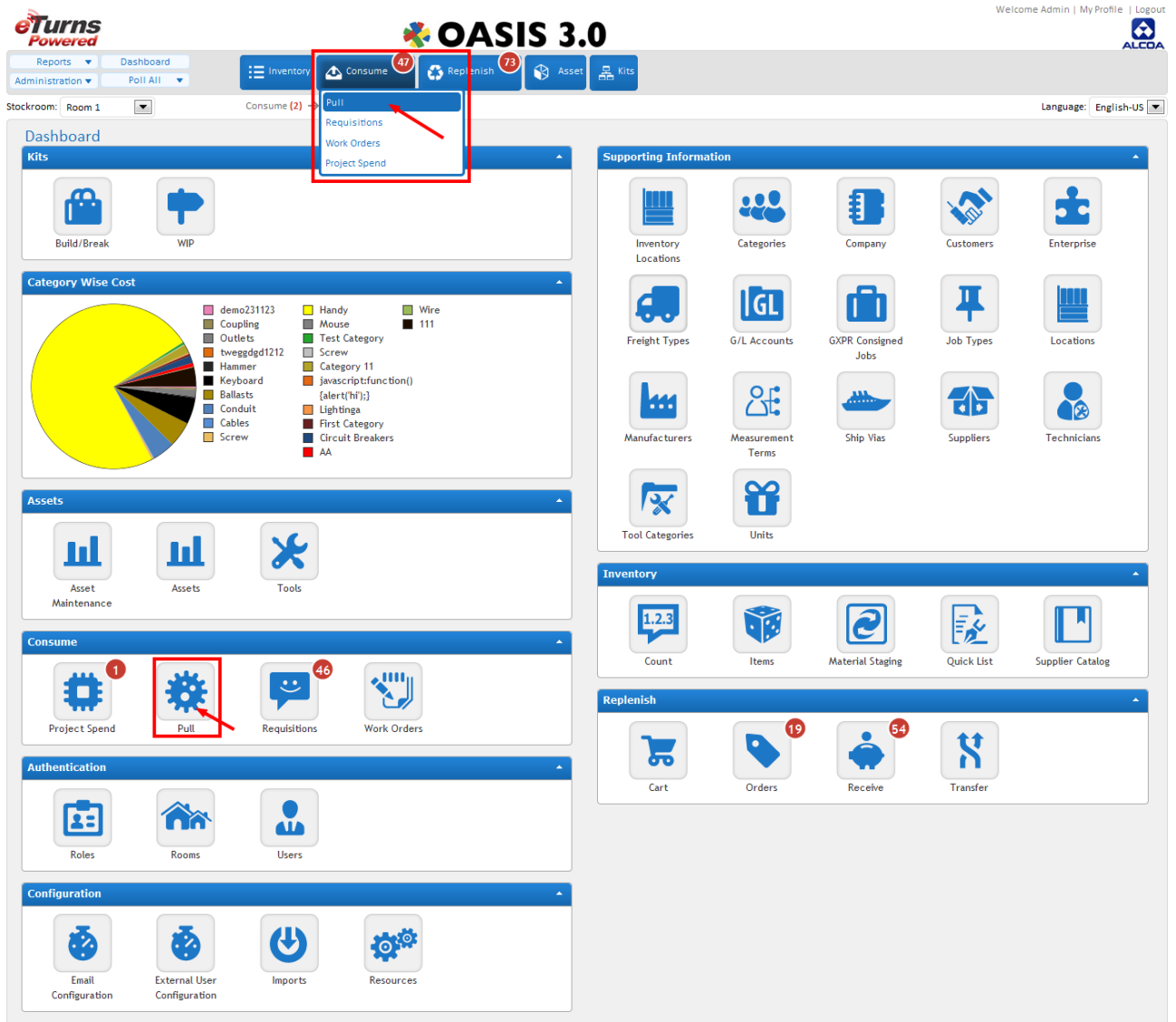


Figure 1

The following page appears on screen:

**OASIS 3.0**

Reports | Dashboard | Administration | Pull All

Inventory | Consume (47) | Replenish (73) | Asset | Kits

Stockroom: Room 1 | Consume (2) → Requisitions (2) → Item (14)

Language: English-US

**Pulls**

Search

Show 10 Records < 1 2 3 4 5 ... 30 >

Go To Page: Go

PullCredit	Pulled Qty	Location	Project Spend Name	ID	Item Number	Created	Updated	Room	Updated By	Created By	Item Type	UDF1_PULL	UDF2_PULL	UDF3_PULL
pull	10	025feb	New PS May	40756	MS TEST	5/1/2013 12:08:59 PM	5/1/2013 12:09:00 PM	Room 1	Admin	Admin	Item			
pull	2	ILOC 2		40753	Light Bulb	4/30/2013 05:55:52 PM	4/30/2013 05:55:53 PM	Room 1	Rock	Rock	Item			
pull	3	ILOC 2	New PS May	40752	Light Bulb	4/30/2013 04:08:32 PM	4/30/2013 04:08:35 PM	Room 1	Rock	Rock	Item			
pull	2	BinLocation20		40751	Screw Driver	4/30/2013 04:07:48 PM	4/30/2013 04:07:56 PM	Room 1	Rock	Rock	Item			
pull	1	abcX		30749	Lenovo Monitor	4/30/2013 11:33:56 AM	4/30/2013 11:33:57 AM	Room 1	Indi	Indi	Item			
pull	1	abcX		30748	Lenovo Monitor	4/30/2013 11:33:41 AM	4/30/2013 11:33:41 AM	Room 1	Indi	Indi	Item			
pull	1	Amit Prajapati 2 2233		30741	Intex Web Cam	4/29/2013 06:26:39 PM	4/29/2013 06:26:43 PM	Room 1	Rock	Rock	Item			
pull	1	Amit Prajapati 2 2233		30738	Intex Web Cam	4/29/2013 02:53:51 PM	4/29/2013 02:53:52 PM	Room 1	Rock	Rock	Item			
credit	25	Amit Prajapati 2 2233		30729	Intex Web Cam	4/26/2013 07:17:33 PM	4/26/2013 07:17:33 PM	Room 1	Admin	Admin	Item			
pull	35	Amit Prajapati 2 2233	New PS May	30728	Intex Web Cam	4/26/2013 07:16:49 PM	4/26/2013 07:16:50 PM	Room 1	Admin	Admin	Item			

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Figure 2

## b. To view Pull record:

The 'History' Tab displays all the pull records. To view the details of a particular Item number, click on Expand icon "+", and detail view of that item number is displayed on screen. To return to previous screen, click on Collapse icon "-".

**OASIS 3.0**

Reports | Dashboard | Administration | Pull All

Inventory | Consume (46) | Replenish (73) | Asset | Kits

Stockroom: Room 1 | Consume (2) → Requisitions (2) → Item (14)

Language: English-US

**Pulls**

Search

Show 10 Records < 1 2 3 4 5 ... 30 >

Go To Page: 2 Go

PullCredit	Pulled Qty	Location	Project Spend Name	ID	Item Number	Created	Updated	Room	Updated By	Created By	Item Type	UDF1_PULL	UDF2_PULL	UDF3_PULL
credit	55	BinLocation1		40773	ItemNumber_#37	5/1/2013 04:36:56 PM	5/1/2013 04:36:56 PM	Room 1	Admin	Admin	Item			

Show 10 records < 1 2 3 4 5 ... 30 >

Go To Page: Go

PULLID	ItemID	Item Number	Item Type	ProjectID	Project Spend Name	BinID	Inventory Location	PullCredit	ItemCost	CustomerOwnedQuantity	ConsignedQuantity	PoolQuantity	S
40773	1039	ItemNumber_#37	Item			83775	BinLocation1	credit	25	45	0	45	
40773	1039	ItemNumber_#37	Item			83794	BinLocation20	credit	25	10	0	10	

1 - 2 of 2

credit	40	ILOC 2		40772	Light Bulb	5/1/2013 04:33:15 PM	5/1/2013 04:33:15 PM	Room 1	Admin	Admin			
credit	35	025feb		40770	MS TEST	5/1/2013 04:30:28 PM	5/1/2013 04:30:28 PM	Room 1	Admin	Admin			
credit	35	025feb		40769	MS TEST	5/1/2013 04:30:27 PM	5/1/2013 04:30:27 PM	Room 1	Admin	Admin			
pull	10	025feb	New PS May	40756	MS TEST	5/1/2013 12:08:59 PM	5/1/2013 12:09:00 PM	Room 1	Admin	Admin			
pull	2	ILOC 2		40753	Light Bulb	4/30/2013 05:55:52 PM	4/30/2013 05:55:53 PM	Room 1	Rock	Rock			
pull	3	ILOC 2	New PS May	40752	Light Bulb	4/30/2013 04:08:32 PM	4/30/2013 04:08:35 PM	Room 1	Rock	Rock			
pull	2	BinLocation20		40751	Screw Driver	4/30/2013 04:07:48 PM	4/30/2013 04:07:56 PM	Room 1	Rock	Rock			
pull	1	abcX		30749	Lenovo Monitor	4/30/2013 11:33:56 AM	4/30/2013 11:33:57 AM	Room 1	Indi	Indi			
pull	1	abcX		30748	Lenovo Monitor	4/30/2013 11:33:41 AM	4/30/2013 11:33:41 AM	Room 1	Indi	Indi			

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Figure 3

### c. Pull a new item:

To pull an item from inventory, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- Select the item to be pulled, enter the number of items to be pulled in the "Quantity to Pull" text box, then select the location from which item will be pulled along with the Project spend from the drop down.
- Hit "Pull" button to pull the item from desired location.

**Legend:**

- Orange background: denotes on hand quantity of item is less than critical quantity
- Yellow background: denotes on hand quantity of item is less than minimum quantity

Figure 4

- Similarly, an item can be credited in the inventory, by selecting the credit radio button, and the screen reflects "Credit" button. Select the location to credit item and hit the Credit button.


Credit	44925	<input type="radio"/> Pull <input checked="" type="radio"/> Credit	20	Light Bulb	ILOC 2	New PS May	Labor	Inbound
--------	-------	---	----	------------	--------	------------	-------	---------

- The following screen appears:

Item Locations

Item Number :Light Bulb

Search

Save 

ID	Consigned Quantity	Inventory Location	Cost	Received Date
0	15	ILOC 2	10.00	5/1/2013
0	25	ILOC 2	10.00	5/1/2013
0		Staging Space	10.00	
0		Staging Shelf	10.00	
0		3	10.00	
0		a	10.00	
0		STG Shelf	10.00	
0		Staging Rack	10.00	
0		s1	10.00	
0		abcX	10.00	
0		1	10.00	
0		Warehouse	10.00	
0		STAGING A1	10.00	
0		ILOC 3	10.00	
0		ILOC 2	10.00	
0		ILOC 1	10.00	
0		STAGING	10.00	
0		Demo111fghfg	10.00	
0		dsafasdfsdfasd11ddfg		
0		dfgsdgsdfgsdfgsdfgsdfgfdg		
0		Demo1111		
0		dsafasdfsdfasd1efsd1		

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Figure 5

- Enter Quantity to be credited in the Consigned Quantity/Customer owned Quantity box.
- The Inventory location is displayed by default as selected in the previous screen; however it can be changed if user wishes to add a new location for the particular item. The user may select desired inventory location from the 'Inventory Location drop down'.
- Receive Date is automatically marked as present date.
- Hit "Save" button to save the record.
- Thus user may, pull or credit an item from inventory.
- The items to be pulled 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.
- These restriction are applied when the user pulls any quantity exceeding the limit assigned to it:
- a. Project Level Amount Restriction: If the user pulls items exceeding the Dollar amount limit defined during Project spend, then this restriction appears on screen: "Project spend Dollar Amount limit exceed do you want to create new requisition for the same ?"

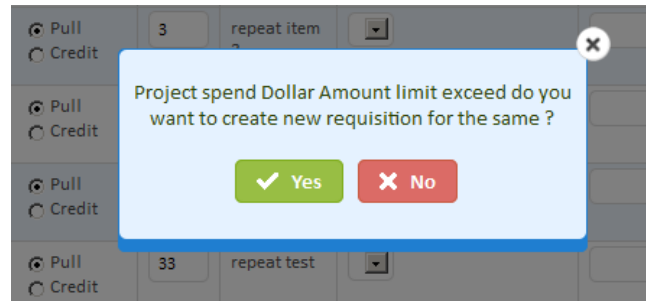


Figure 6

- b. Project Spend Item's QTY: If the user pulls items more than present in inventory, then this message appears on screen: "Project spend Item's Quantity limit exceed do you want to create new requisition for the same".

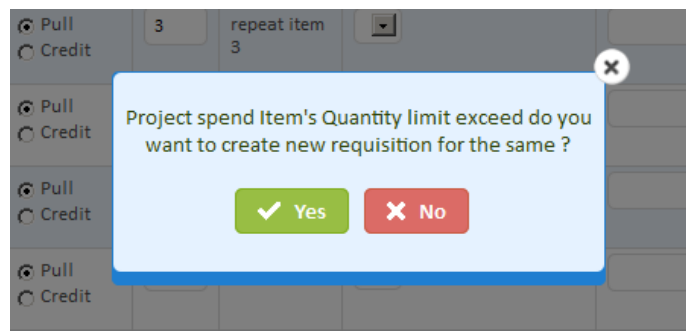


Figure 7

- c. Project Spend Item's Dollar Amount: If the user pulls items exceeding the amount assigned to item spend, then this message appears on screen: "Project spend Item's Dollar limit exceed do you want to create new requisition for the same".

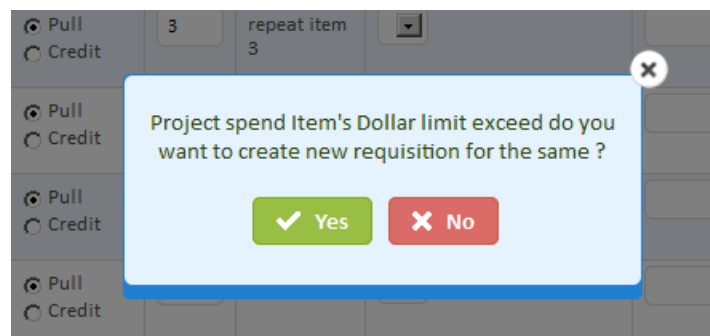

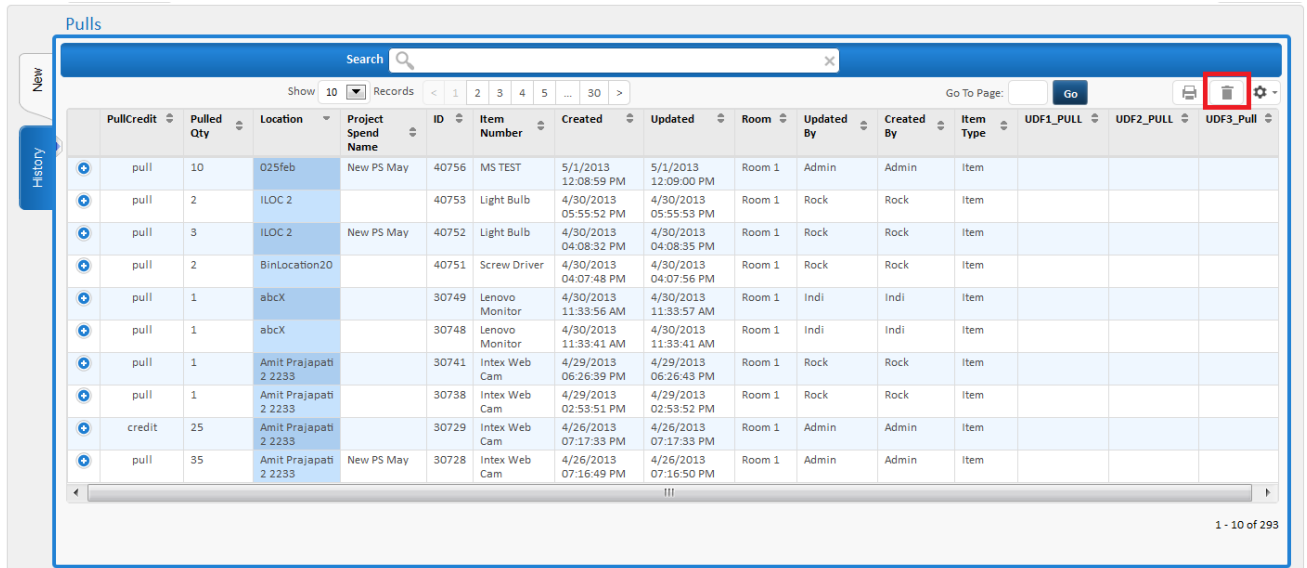


Figure 8

#### d. Delete a record:

To delete a project, select the record 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.



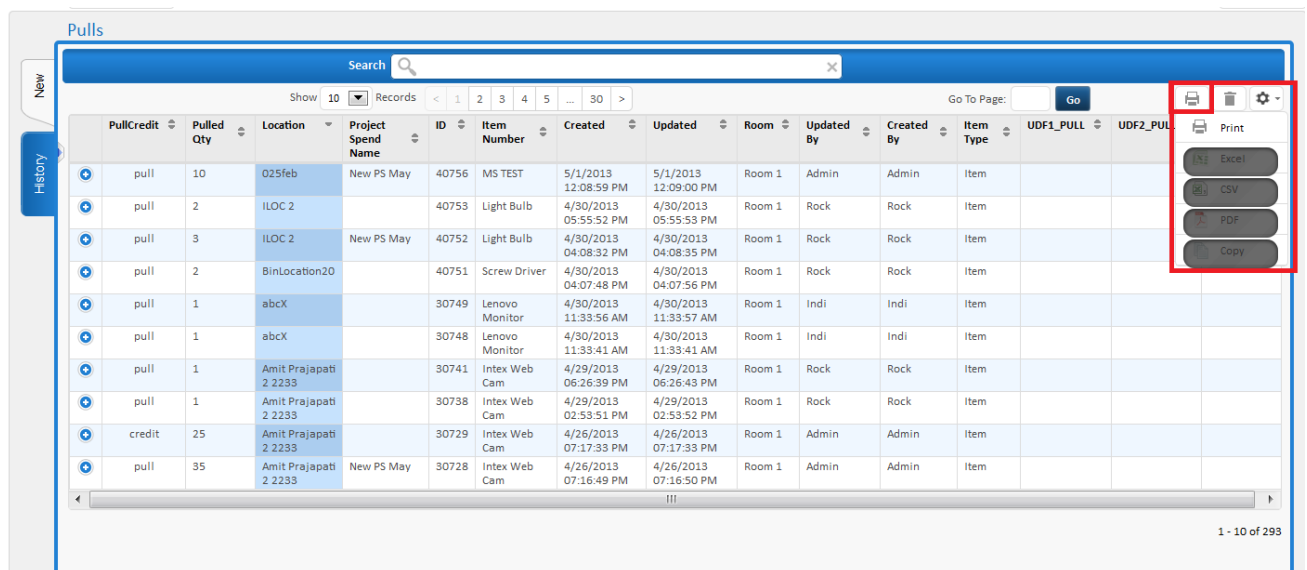
The screenshot shows a web application interface for managing 'Pulls'. At the top, there is a search bar and a 'Go To Page' field. Below this is a table with columns: PullCredit, Pulled Qty, Location, Project Spend Name, ID, Item Number, Created, Updated, Room, Updated By, Created By, Item Type, UDF1\_PULL, UDF2\_PULL, and UDF3\_PULL. The table contains several rows of data, including items like 'MS TEST', 'Light Bulb', 'Screw Driver', 'Lenovo Monitor', and 'Intex Web Cam'. A red box highlights the Delete icon (a trash can) in the top right corner of the interface.

Figure 9

#### 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.



This screenshot is similar to Figure 9, showing the same 'Pulls' table. However, a red box highlights the export options in the top right corner. These options include 'Print', 'Excel', 'CSV', 'PDF', and 'Copy', each with a corresponding icon.

Figure 10



#### f. View change log:

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

ID	History ID	Action	Item Number	Project Spend Name	Pull Quantity	On Hand Quantity	Created	Updated	CreatedBy	LastUpdatedBy	IsDeleted	IsArchived	Room	UDF1_PULL	UDF2_PULL
40756	30900	insert	MS TEST	New PS May	10	2374	5/1/2013 12:08:59 PM	5/1/2013 12:08:59 PM	1	1	false	false	Room 1		
40756	30901	update	MS TEST	New PS May	10	2374	5/1/2013 12:08:59 PM	5/1/2013 12:09:00 PM	1	1	false	false	Room 1		

Figure 11

#### g. Search Pulls 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.

PullCredit	Pulled Qty	Location	Project Spend Name	ID	Item Number	Created	Updated	Room	Updated By	Created By	Item Type	UDF1_PULL	UDF2_PULL	UDF3_PULL
credit	55	BinLocation1		40773	ItemNumber_#37	5/1/2013 04:36:56 PM	5/1/2013 04:36:56 PM	Rdom 1	Admin	Admin	Item			
credit	40	LOC 2		40772	Light Bulb	5/1/2013 04:33:15 PM	5/1/2013 04:33:15 PM	Rdom 1	Admin	Admin	Item			
credit	35	025feb		40770	MS TEST	5/1/2013 04:30:28 PM	5/1/2013 04:30:28 PM	Rdom 1	Admin	Admin	Item			
credit	35	025feb		40769	MS TEST	5/1/2013 04:30:27 PM	5/1/2013 04:30:27 PM	Rdom 1	Admin	Admin	Item			
pull	10	025feb	New PS May	40756	MS TEST	5/1/2013 12:08:59 PM	5/1/2013 12:09:00 PM	Rdom 1	Admin	Admin	Item			
pull	2	LOC 2		40753	Light Bulb	4/30/2013 05:55:52 PM	4/30/2013 05:55:53 PM	Rdom 1	Rock	Rock	Item			
pull	3	LOC 2	New PS May	40752	Light Bulb	4/30/2013 04:08:32 PM	4/30/2013 04:08:35 PM	Rdom 1	Rock	Rock	Item			
pull	2	BinLocation20		40751	Screw Driver	4/30/2013 04:07:48 PM	4/30/2013 04:07:56 PM	Rdom 1	Rock	Rock	Item			
pull	1	abcX		30749	Lenovo Monitor	4/30/2013 11:33:56 AM	4/30/2013 11:33:57 AM	Rdom 1	Indi	Indi	Item			
pull	1	abcX		30748	Lenovo Monitor	4/30/2013 11:33:41 AM	4/30/2013 11:33:41 AM	Rdom 1	Indi	Indi	Item			

Figure 12

- 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:

Search

Show 10 Records < 1 2 3 4 5 ... 30 > Go To Page:  Go

**Narrow Search By:**

Supplier

Category

Manufacturer

Cost

User (Created by)

User (Updated by)

Date Created

From

To

Date Updated

From

To

UDF1

UDF3

Clear

PullCredit	Pulled Qty	Location	Project Spend Name	ID	Item Number	Created	Updated	Room	Updated By	Created By	Item Type	UDF1_F
credit	55	BinLocation1		40773	ItemNumber_#37	5/1/2013 04:36:56 PM	5/1/2013 04:36:56 PM	Room 1	Admin	Admin	Item	
credit	40	ILOC 2		40772	Light Bulb	5/1/2013 04:33:15 PM	5/1/2013 04:33:15 PM	Room 1	Admin	Admin	Item	
credit	35	025feb		40770	IMS TEST	5/1/2013 04:30:28 PM	5/1/2013 04:30:28 PM	Room 1	Admin	Admin	Item	
credit	35	025feb		40769	IMS TEST	5/1/2013 04:30:27 PM	5/1/2013 04:30:27 PM	Room 1	Admin	Admin	Item	
pull	10	025feb	New PS May	40756	IMS TEST	5/1/2013 12:08:59 PM	5/1/2013 12:09:00 PM	Room 1	Admin	Admin	Item	
pull	2	ILOC 2		40753	Light Bulb	4/30/2013 05:55:52 PM	4/30/2013 05:55:53 PM	Room 1	Rock	Rock	Item	
pull	3	ILOC 2	New PS May	40752	Light Bulb	4/30/2013 04:08:52 PM	4/30/2013 04:08:55 PM	Room 1	Rock	Rock	Item	
pull	2	BinLocation20		40751	Screw Driver	4/30/2013 04:07:48 PM	4/30/2013 04:07:56 PM	Room 1	Rock	Rock	Item	
pull	1	abcX		30749	Lenovo Monitor	4/30/2013 11:33:56 AM	4/30/2013 11:33:57 AM	Room 1	Indi	Indi	Item	
pull	1	abcX		30748	Lenovo Monitor	4/30/2013 11:33:41 AM	4/30/2013 11:33:41 AM	Room 1	Indi	Indi	Item	

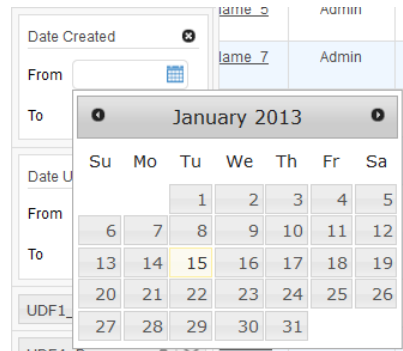
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Figure 13

Field	Description
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. Dropdown appears:</p> <p>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><b>Note:</b> 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".

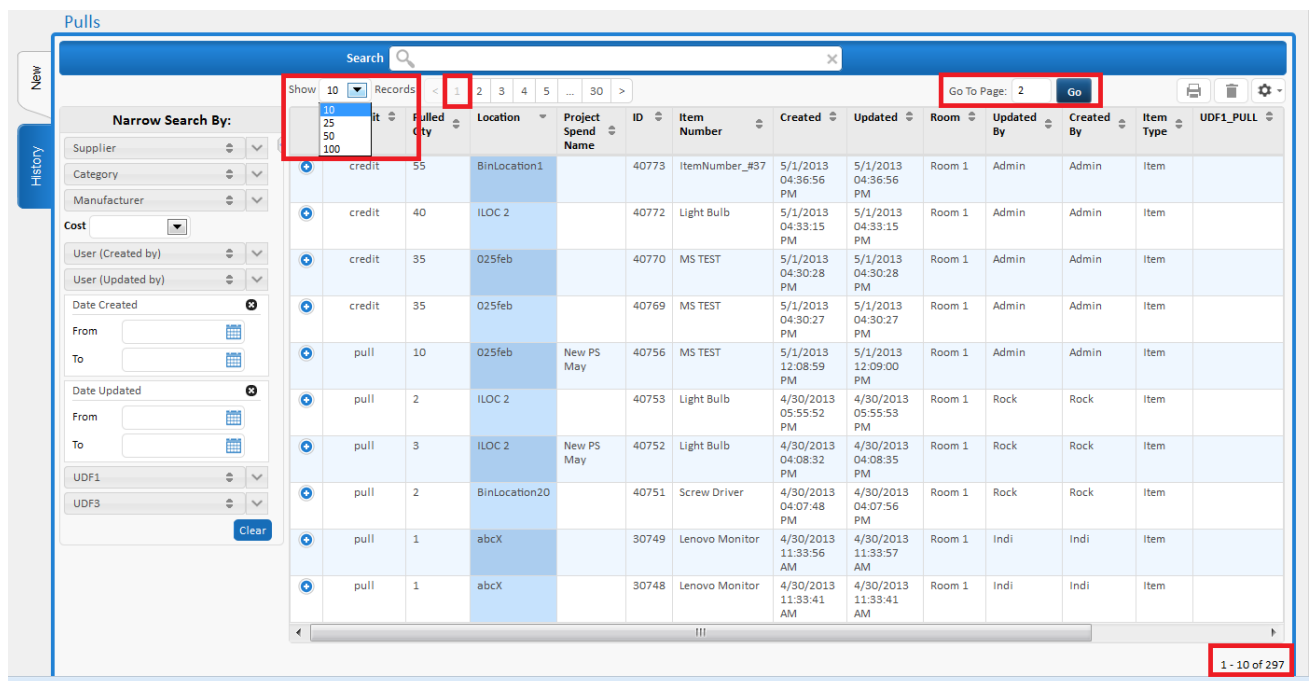


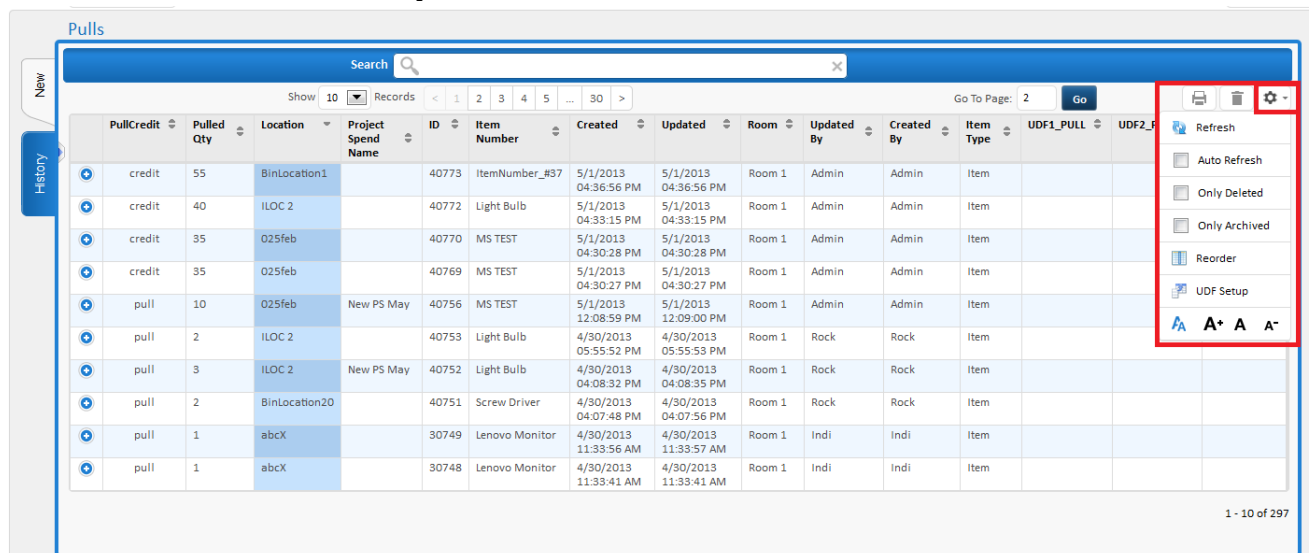
Figure 14

## 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.

- 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”.



PullCredit	Pulled Qty	Location	Project Spend Name	ID	Item Number	Created	Updated	Room	Updated By	Created By	Item Type	UDF1_PULL	UDF2_PULL
credit	55	BinLocation1		40773	ItemNumber_#37	5/1/2013 04:36:56 PM	5/1/2013 04:36:56 PM	Room 1	Admin	Admin	Item		
credit	40	ILOC 2		40772	Light Bulb	5/1/2013 04:33:15 PM	5/1/2013 04:33:15 PM	Room 1	Admin	Admin	Item		
credit	35	025feb		40770	MS TEST	5/1/2013 04:30:28 PM	5/1/2013 04:30:28 PM	Room 1	Admin	Admin	Item		
credit	35	025feb		40769	MS TEST	5/1/2013 04:30:27 PM	5/1/2013 04:30:27 PM	Room 1	Admin	Admin	Item		
pull	10	025feb	New PS May	40756	MS TEST	5/1/2013 12:08:59 PM	5/1/2013 12:09:00 PM	Room 1	Admin	Admin	Item		
pull	2	ILOC 2		40753	Light Bulb	4/30/2013 05:55:52 PM	4/30/2013 05:55:53 PM	Room 1	Rock	Rock	Item		
pull	3	ILOC 2	New PS May	40752	Light Bulb	4/30/2013 04:08:32 PM	4/30/2013 04:08:35 PM	Room 1	Rock	Rock	Item		
pull	2	BinLocation20		40751	Screw Driver	4/30/2013 04:07:48 PM	4/30/2013 04:07:56 PM	Room 1	Rock	Rock	Item		
pull	1	abcK		30749	Lenovo Monitor	4/30/2013 11:33:56 AM	4/30/2013 11:33:57 AM	Room 1	Indi	Indi	Item		
pull	1	abcK		30748	Lenovo Monitor	4/30/2013 11:33:41 AM	4/30/2013 11:33:41 AM	Room 1	Indi	Indi	Item		

Figure 15

#### 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