Pick

Client Users Guide

Version 2.6.7

This document is intended for use by
End users and Functional Managers

Change Record

Date	Author	Version	Change Reference
7/22/2008	D. Baxter	1.0	v2.6.5.0
1/8/2010	R. Hatt	2.6.5	
1/19/2011	S. Godfrey	2.6.6	
3/29/2011	S. Godfrey	2.6.6	SP2
10/31/2012	R. Hatt	2.6.6	SP5/SP6
4/30/2013	R. Hatt	2.6.7	New Release

Table of Contents

AtPar Login Screen

The @Par Hand Held Terminal (HHT) device login screen can be accessed when users are set up by their @Par Administrator or Supervisor. @Par Version information is displayed on the login screen. The [✓ Remember Me] checkbox will retain the user id information of the user who last used the HHT. This will require only the entry of the password for that user.

The keyboard should appear automatically upon access to this screen. This allows users' easy access to type in their information. If the keyboard doesn't appear tap the [⌨] icon in the bottom center of the login screen.

Enter your **Login Name** and **Password** and *TAP* the [Login] button **Figure 1**.

Figure 1

AtPar Apps Screen

Based on the applications assigned to the client user by the administrator or supervisor the screen below appears for access to an @Par product or products **Figure 2**
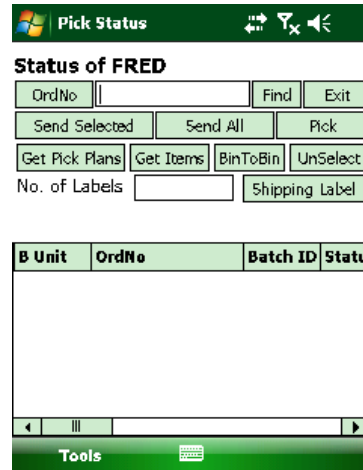

Figure 2

Figure 3

Upon successful login if the user only has access to the **@Par Pick** they will move automatically to the **Pick Status** screen, shown in **Figure 3.** If the user has more than one **@Par** product the icons will appear in **Figure 2** for user to choose which application to use.

The **Pick Status** screen is the main screen and is used to download pick plans and items as well as send data to the ERP server upon completion of item pick.

To get started *TAP* the **Pick** icon. This will launch the module and you will see the **Pick Status** screen **Figure 3**.

Pick

The **Pick** product is used by organizations in lieu of a printed **Pick List, Material Stock Request (MSR)**, **Order**, or **Pick Ticket.**

Materials Management staff utilizes this product to pick items that need to be replenished on Par Locations.

After Cart/Par Location counting has been done, the ERP system runs a process to create the current **Pick Lists**, **MSR**, **Orders**, or **Pick Tickets.** This process is still required, but instead of printing out Pick Plans on paper, and dispersing, the user will be able to download them onto a hand held terminal (HHT) device. Once downloaded on the HHT, the user will select the **Pick Plan** to get the items, and scan barcode labels to select the items for **Picking.**

Pick buttons and fields explanations

The **Pick Status Report** screen which is the primary application screen.

Figure 4

![OrdNo] - This is the Pick Order Number, which is generated by the ERP system as part of the order fulfillment process**.**

NOTE: This field is called a toggle switch or toggle button. The user can switch between field labels by *tapping* on the button which displays the next available search field. Available fields that can be utilized here are Order Number, Business Unit, Batch ID, Location, Priority, Destination Location, Status, and User ID. The ability to *TAP* on this field and move between options is set by the Supervisor or @Par Administrator using **"Pick Profile - Screen Display Setup".**

![Find] - Combined with entering the **OrdNo**, when you *TAP* this button, the record will appear on the HHT highlighted.

- If a user TAPS this button without an OrdNo **Figure 5** appears
- If the **OrdNo** that was entered is **not** downloaded to the HHT the following message appears "No pick plans present" **Figure 6**

Figure 5

Figure 6

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Exit - Exits user from @Par Pick screen.

Send Selected - This option uploads (or moves) Plans and Items to the production server.

- User highlights the Plan to upload, and **TAPS** the **Send Selected** button
- Only plans with a status of **PICKED** can be uploaded

Send All - This option will send Plans and Items form the HHT to the production server. All orders must have a status of **PICKED**.

- User is **not** required to highlight each Plan in order to send it using this option

Pick - Once plans and items are in **DOWNLOAD** status on the HHT user will **TAP** this button and proceed to the **Item Picks** screen for picking to begin.

Get Pick Plans - Downloads Plan *header information only* for any **open** Plans on the ERP. The plans download to the HHT in **OPEN** status.

Get Items - The user highlights a plan that is on the HHT and TAPS this button. Successful download of items will move the plan from **OPEN** status to **DOWNLOAD** status. Before plans may be picked they must be in **DOWNLOAD** status.

BinToBin - If the organization has the @Par Bin to Bin product this button may appear on your screen. If the Supervisor selects the following parameter, this button will appear.

Allow the user to do Bin To Bin transfer	☐	[Checking this will allow the user to navigate to Bin To Bin Application from Pick Plan]

Shipping Label - Prints header label and/or delivery ticket to mobile or stationary printer based on the profile parameter setting selected by the supervisor or @Par Administrator.

Shipping Label Print Options	○ None ◉ Print Header Label only to a Mobile Printer ○ Print Delivery Ticket only to a Stationary Printer ○ Print Header Label to a Mobile Printer and Delivery Ticket to a Stationary Printer	[Use this parameter to define the type of Shipping Label to be printed from the Hand Held after picking is complete]

A sample of the Delivery Ticket is shown below

ORDER # :	MSR0003415		Tracking# :	79201231214544633
Deliver To :	PLICN - ICN PAR LEVEL		Pick Date :	10/07/2012
Deliver From :	STKRM - Hospital Stockrm		Tote :	

ITEM ID	Description	Quantity Requested		Quantity Allocated		Quantity Picked	
0030235	Glove, Nitrile, LF, Sz 4.5	5	PR	0	PR	1	PR
0030236	Glove, Nitrile, LF, Sz 5.0	5	PR	5	PR	3	PR
0030237	NITRILE GLOVE SZ5.5	5	PR	1	PR	1	PR
0030238	Glove, Nitrile, LF, Sz 6.0	5	PR	5	PR	1	PR

Using the Org Group Parameter below allows an organization to print the header information not only on page 1 but all subsequent pages of the Delivery Ticket

Print Pick Deliver header in Each Page	☐	[Checking this will allow users to Print Pick Deliver header in Each Page]

NOTE: Mobile Printer will use the Printer setup in the HHT Printer Settings; Stationary Printer will need to be assigned at Server Level: Pick: Allocate Business Units Default Printer field.

	Select: <u>All</u> | <u>None</u>	Business Unit	Description	Default Printer	User
⌐	☐	STKRM	Hospital Stockrm		Atpar HHT(ATPAR), ATPAR HHT(HHT), sarah godfrey(SARAH_TEST), sarah test2(SGTEST)
⌐	☐	US001	US001 NEW YORK OPERATIONS		Atpar HHT(ATPAR), ATPAR HHT(HHT), sarah godfrey(SARAH_TEST)

No. of Labels [_____] - Enter the number of labels to print if multiple labels of same information is required. If value is blank only one label will print by default.

UnSelect - This button will remove a highlighted selection from the grid

How to Pick Items

A new feature in @Par Pick and @Par Delivery is the ability to track Picked Inventory Orders in the @Par Delivery Module. If the following Org Group Parameter is selected, the Pick Order information will be stored in the @Par database, making the orders available for delivery

Storage of Picked Items for Delivery	☑	[Checking this will store Picked Item Information in @Par after uploading to ERP for the purpose of Delivery Tracking]

To begin using **@Par Pick**, users must first get the information onto the HHT.

TAP the Get Pick Plans button. **Figure 7**
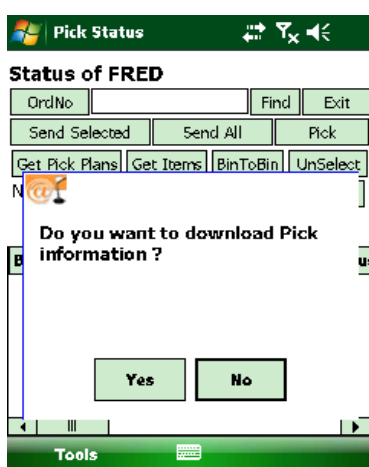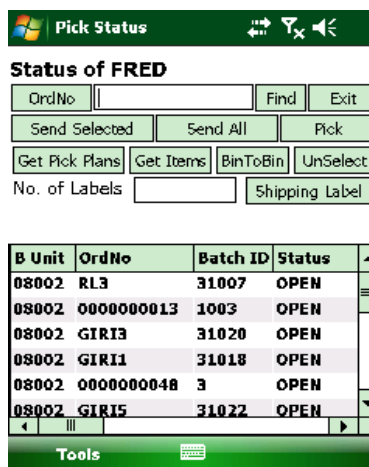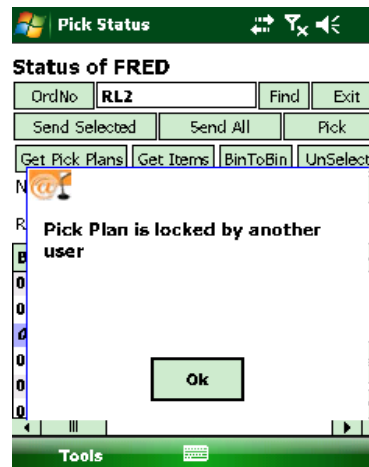
Figure 7	Figure 8	Figure 9

TAP the Yes button to continue the download of pick plans **(Figure 8)** or *TAP* the No button to return without downloading plans.

Notice all **Batches and OrdNo's** are in a status of **OPEN.** The open status means that the user has downloaded all open **Pick** header information but no items associated with the **Pick Plan** yet.

There may be multiple locations, labeled **Dest Loc**, for the same order number.
- User must select the correct one to pick. Destination Locations are where the Picked items will be delivered to, for example a Cart/Par Location.
- *Scroll* to the right on this screen using the scroll bar at the bottom. Find the **Dest Loc** column.

Highlight one of the **Pick Orders** and *TAP* the Get Items button.
- If the Order is being picked by another user, the pop up message may appear **Figure 9.** This message appears if the following Org Group parameter is unchecked
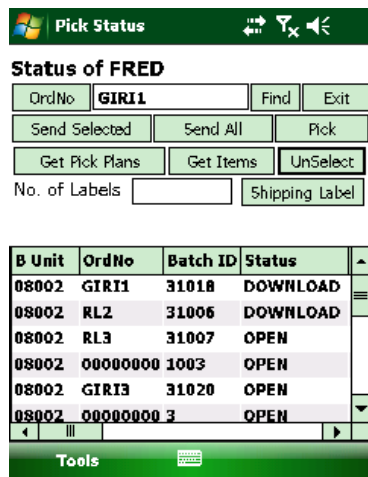
Multiple Users can download the same Pick Plan	☐	[Selection of this parameter will allow multiple users to download the same pick plan]

When the message appears contact the supervisor who will need to use the Release Orders function from the @Par Web pages on Pick.

If the pick plan is not locked by another user this message will display on the HHT

Requesting/Downloading data from server
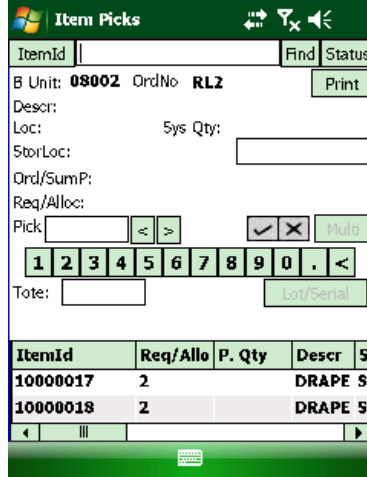
Once download is complete, Items have been downloaded message will display,

Notice the status has changed from **OPEN** to **DOWNLOAD. Figure 10**
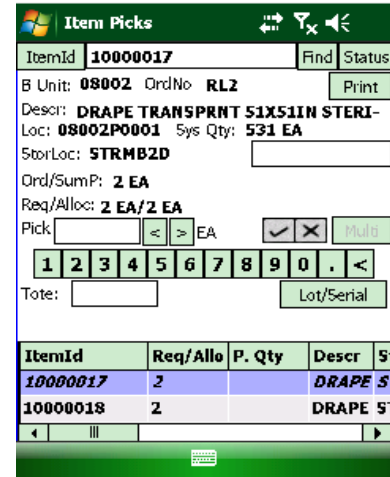
| Figure 10 | Figure 11 | Figure 12 |

This means the items associated with this **Pick Plan** have been downloaded on the HHT and the order is ready to be **picked**.

If the user wants to pick multiple plans they will download items for each pick plan to pick. This will put x number of plans in **DOWNLOAD** status. Now they click the [Pick] button and all items for each plan will appear on the Item Picks screen to pick.

If the user wants to pick a single plan at a time they *highlight* a line in **DOWNLOAD** status and **TAP** the [Pick] button. The **Item Picks** screen appears with items as shown in **Figure 11.**

The upper section of the screen is the **Detail** screen.

NOTE: The white box to the right of the Stor. Loc (Storage Location) field. If the following Profile Parameter is checked, the cursor will default in this field upon scanning or selecting and item to pick. This forces a user to scan or enter the Storage Location and if it doesn't match the StorLoc: it will prohibit the user from continuing on.

| Storage Location check Required | ☐ | [Checking this option will force user entered location is same as Storage location or not] |

This is to ensure the user is selecting the item from the correct storage location. Items may have multiple Storage Locations.

The [ItemId] button is a search option field or, as mentioned earlier in this document, a toggle switch.
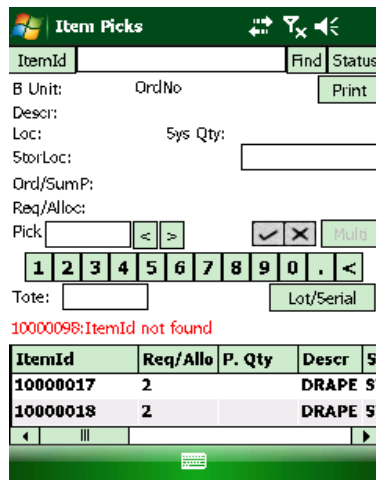
- If the user *enters or scans* the **Item ID** and **TAP** the [Find] button, it will find the **Item ID** on the plan.

- o The toggle field can be changed to Manufacturer Item ID, Vendor Item ID, Custom Item ID, Item Description, GTIN (Global Trade ID Number), Line Number, Storage Location, or UPC ID
- Users can switch fields by **TAPPING** on the [ItemId] button until you see the button changes to the required ID

Setting up toggle switches is done by the supervisor or @Par Administrator on the Screen Display Setup on web pages.

[Find] - Combined with **entering or scanning** an **Item ID** when the user **TAPS** this button, the **Item ID** which was typed in will appear in the grid, **highlighted**.

 If the **Item ID** that was entered is not downloaded to this HHT the message "**Item not found**" as shown below appears. **Figure 13**

| **Figure 13** | **Figure 14** |

[Status] - **TAP** this button to return to the **@Par Pick** status screen.

[Print] - - Allows user to print a new Item bar code label if the current one is old and unreadable or non-existent. **Highlight** the **Item ID** and **TAP** on this button to print label replacement to a mobile printer

[Tote:] - User populated field, to know which tote items are placed in.   This will be a field used on the Shipping Labels.

B Unit - Business Unit. *This is a Non editable field.*

OrdNo - Order number. *This is a Non editable field.*

Descr - Item ID Description. *This is a Non editable field.*

Loc – Delivery Location or Cart/Par Level location. *This is a Non editable field.*

Sys. Qty - On hand system quantity and UOM. *This is a Non editable field.*

Stor. Loc. - Item ID storage location that a user is picking items from. *This is a Non editable field.*

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OrdSumP - If the item is being picked from more than one location/bin the ordered quantity will be summed. *This is a Non editable field.*

Req/Alloc – Item ID Requested and allocated quantity. *This is a Non editable field.*
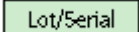
Pick Qty - Actual Pick Quantity,

UOM is displayed to the right of the ⟨<⟩⟨>⟩.buttons. The ⟨<⟩⟨>⟩ keys can be used to manually move up or down through the list of values. Enter the quantity for any items issued and continue this process until all the items have been counted.

☑️✖️ - If the following profile parameter is selected the default input buttons will appear

Default Input	☑	[Checking this will default the Counts for user]

Multi - If an item is stored in multiple storage locations this button becomes enabled. It allows a user to pick for any storage location for this item. This is covered in more detail later in this document.
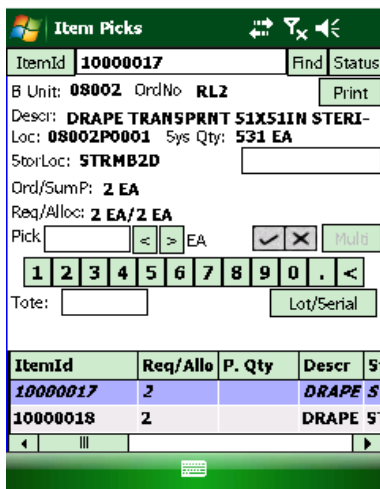
Lot/Serial - If an item is identified in the ERP system as a Lot Controlled or Serial Controlled item this button will be enabled. This may also appear enabled if the following Org Group parameter is set to AtPar – which allows storage of this informationto the AtPar Middle Tier database for tracking and reporting purposes.

Enable Lot /Serial Tracking	○ None	[None - Send Lot /Serial information to MMIS is unchecked and disabled
	○ MMIS	MMIS - Send Lot /Serial information to MMIS is checked and disabled
	● AtPar	AtPar - Send Lot /Serial information to MMIS is unchecked and enabled]

NOTE: Currently, only PeopleSoft ERP systems manage Lot or Serial items.
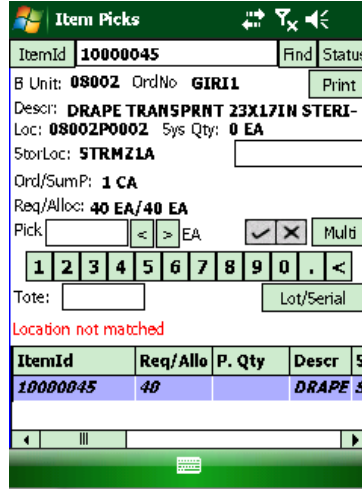
The Detail section on the **Item Picks** screen will not populate information until the Item has been **highlighted.**

Once the item is **highlighted**, the detail information will display as shown in **Figure 15.**
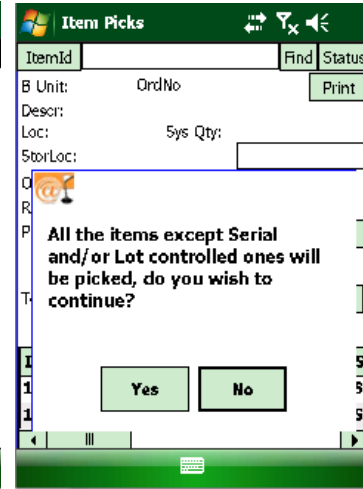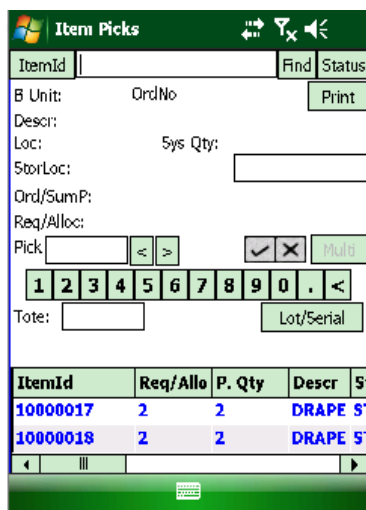
Figure 15

Figure 16

Figure 17

If the storage location is required to match, and doesn't, the message in **Figure 16** appears

If the following Org Group parameter has been selected, users will have the Soft Input Panel keyboard appears as in **Figure 15** and **Figure 16**

This would be beneficial for organizations that have HHT devices without a key board availble.

If the user clicks the button the message in **Figure 17** may appear. This indicates that the Pick Qty field will be populated from the Requested/Allocated Qty field for all items that are not flagged as Lot or Serial Controlled. **Figure 18**
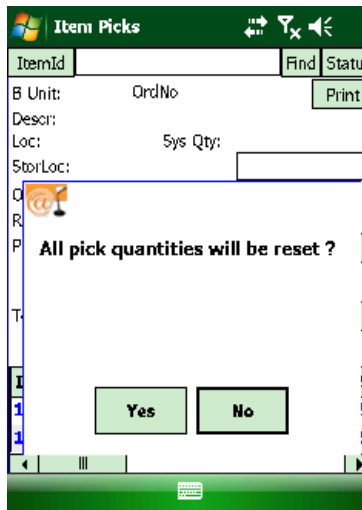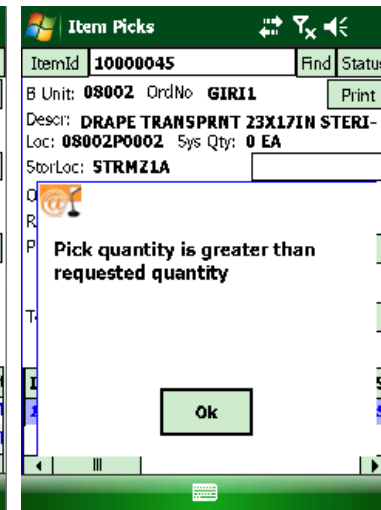
Figure 18

Figure 19

Figure 20

Users with this functionality can complete their picking by exception. This is a quick and efficient method when picking plans with a significant number of items. However, the user must ensure

they are physically picking the number as noted on the grid. If there is a variance they will simply enter the correct Pick Qty.

Clicking on the ☒ button will display the message in **Figure 19** to the user.

The user can *TAP* the [Yes] button which will reset the Pick Qty for all items back to blank. **Figure 20**

If the user TAPS the [No] button the Pick Qty will remain on the HHT.

If a user attempts to enter a Pick Qty greater than the Req/Alloc quantity they may receive the message in **Figure 20**. When user *clicks* the [ok] button they are returned to the **Items Pick** screen to enter a valid Pick Qty.

If the profile parameters are checked, users will have the ability to enter a Pick Qty greater than the Req/Alloc.

Allow more than allocated qty	☐	[Checking this option will allow users to enter more than allocated Quantity]
Allow more than requested qty	☐	[Checking this option will allow users to pick more than requested quantity]

If the following profile parameter is checked and a user attempts to leave the **Item Picks** screen without picking all items the following message will appear **Figure 21**

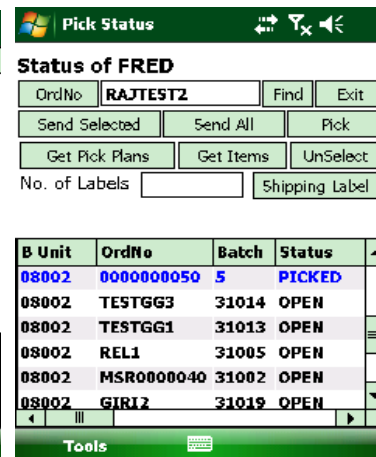| Pick all items	☐	[Checking this will force the user to Pick all items in a given Pick Plan before sending]
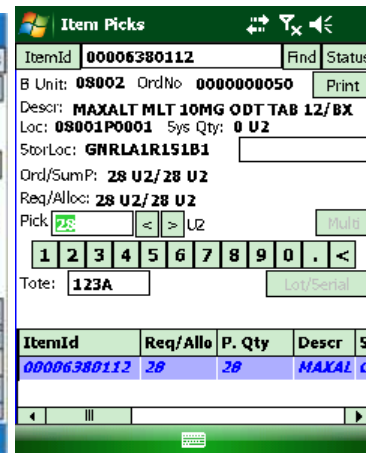
| Figure 21 | Figure 22 | Figure 23 |

The user can *TAP* the [Yes] button which will return them to the **Item Picks** screen to continue picking or *TAP* the [No] button to return to the **Pick Status** screen. They will be unable to send the plan to the ERP system until the items are all picked however.

Once the plan and item/s are picked, enter a Tote value if required. **Figure 22**

Click the [Status] button to return to the **Pick Status** screen. **Figure 23**

The plan will now be in **PICKED** status. User can now highlight the record and click the
[Send Selected] button or simply click [Send All] button which sends all plans in **PICKED**
status without the need of highlighting individually.
.

Lot Serial item picking

When an organization has the following Org Group parameters selected the HHT users will pick
the items differently.

Enable Lot /Serial Tracking   ○ None   ○ MMIS   ● AtPar

[None - Send Lot /Serial information to MMIS is unchecked and disabled
MMIS - Send Lot /Serial information to MMIS is checked and disabled
AtPar - Send Lot /Serial information to MMIS is unchecked and enabled]

If NONE is selected the button on the Item Picks screen will appear disabled [Lot/Serial] for all
items.

If MMIS is selected the [Lot/Serial] button will appear enabled for items only flagged as Lot or
Serial Contolled in the ERP. For items not flagged as Lot or Serial Controlled in the ERP the
button will be disabled [Lot/Serial]

If AtPar is selected the [Lot/Serial] button will be enabled for ALL items.

The picking process is the same when the [Lot/Serial] button is enabled

When an item is scanned or entered on the **Item Picks** screen and the item is Lot/Serial
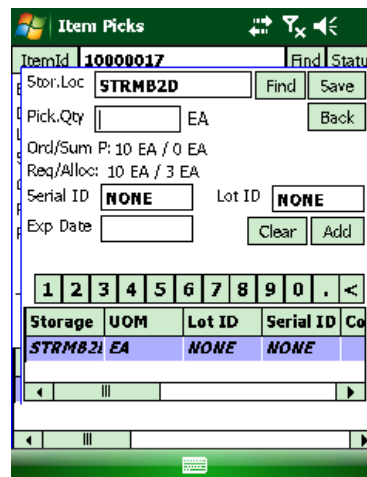controlled the screen will display as in **Figure 24**
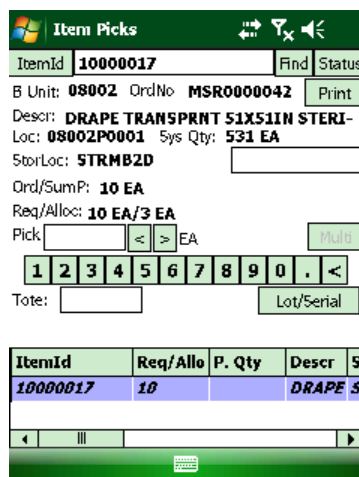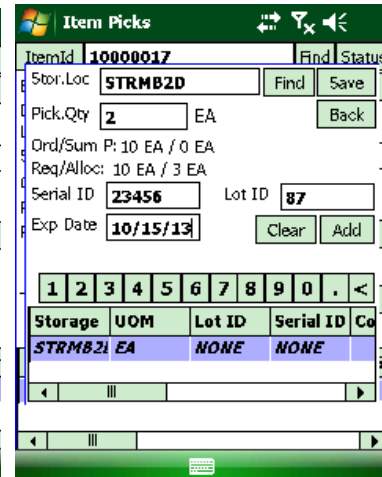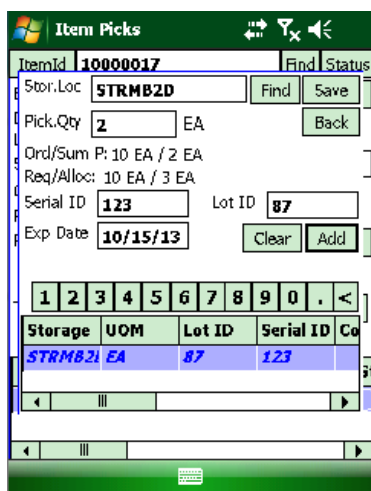

| Figure 24 | Figure 25 | Figure 26 |

The HHT will not allow the user to enter a picked quantity in the Pick field. They must click the
[Lot/Serial] button. When the button is selected the screen displays as in **Figure 25**

NOTE: None appears as default in the Serial ID and Lot ID field. Both fields are editable to overwrite with valid data. This will occur because the items are flagged as Lot/Serial controlled and values must be entered.

HHT staff will now pick items with their respective Serial or Lot IDs ensuring they enter Exp Date as a mandatory field. **Figure 26**
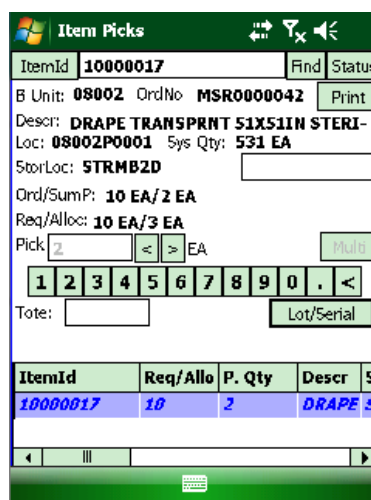
If user selects the following buttons the actions will be as described

- Clear - Clears all data entered on the screen and user can repeat or leave using the Back button

- Add - Adds the picked item and information to this screen as in **Figure 27**

- Save - Saves the added item and returns to the Item Picks screen with the picked quantity value displayed and the Ord/SumP valued updated **Figure 28**

Figure 27	Figure 28

If the user needs to pick additional quantities of the item they will use the same process

Upon picking all items required the user follows the same process to send the data to the ERP system as in previously mentioned workflow.
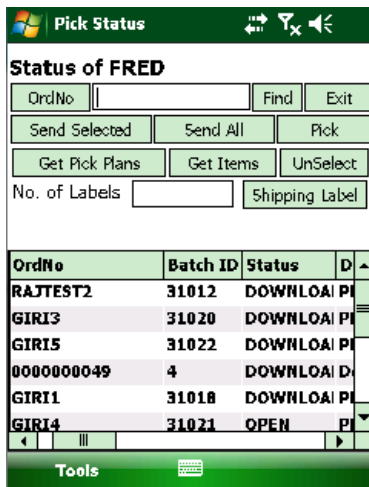
Picking multiple plans

In order to pick more than one plan at a time, the user will use the following process

Click the Get Pick Plans button.

Click the Get Items button for each plan that is in **OPEN** status and the user wants to pick.

In the example in **Figure 29** there are 5 plans in **DOWNLOAD** status.

| Figure 29 | Figure 30 | Figure 31 |

User now *clicks* the [Pick] and begins picking all items.

After user finishes picking items and returns to the **Pick Status** screen, all plans will be in **PICKED** status and can be sent to the ERP system.
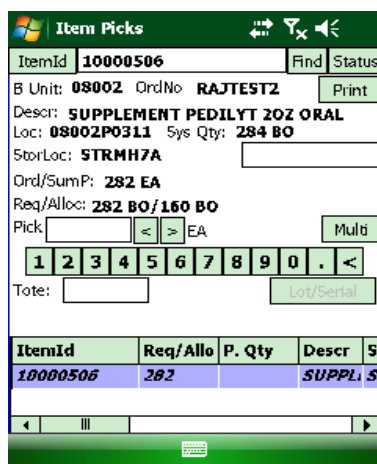
Picking items with Multiple Storage Locations

Some organizations may have items stored in multiple storage locations. This function will allow HHT users the ability to choose which storage location to use, as well as picking the same Item ID from multiple storage locations on the same Pick Plan.

To enable Multiple Storage Location Picking, the following profile Parameter must be checked.

| Allow picking from multiple storage locations | ☐ | [Checking this will allow the user to pick items from multiple storage locations for a pick line] |

From the **Item Picks** screen users scan or enter an item **Figure 32**

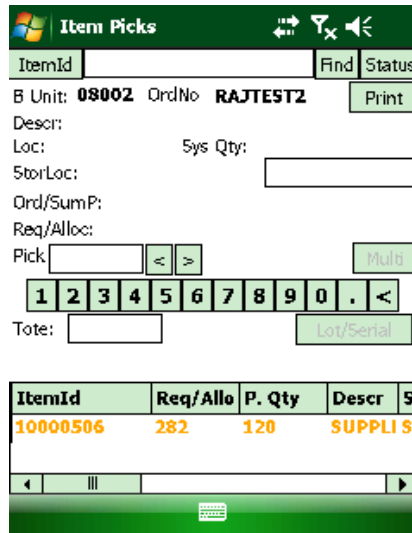| Figure 32 | Figure 33 | Figure 34 |

If the item is stored in multiple locations the [Multi] button will appear enabled. User can now either pick all the Req/Alloc quantity from the storage location appearing on the Item Picks screen or click this button.

If user clicks the [Multi] button the screen in **Figure 33** appears.

If a user picks partial quantity from a storage location the screen will appear in **Figure 34.** Note how the **Ord/SumP** quantity changes with the initial **Pick Qty** entry from the first storage location. The user now goes to the next storage location and enters the **Pick Qty**

Once the user is done, they will click the [Save] **button and the Item Picks screen appears Figure 35**

Figure 35

The font on the HHT has changed to indicate the items were picked from multiple storage locations.

The process to go to the Pick Status screen and send information is the same as previously discussed in this document.

NOTE: The message Picked Quantity less than allocated quantity   may appear anytime during picking items. This occurs when the Pick quantity is less than the allocated quantity and is a reminder to users the Pick Plan is not fulfilled yet.

Picking items with Substitute Items

HHT Users now have the ability to view and pick substitute items (when available) when partial or zero quantity is available for the original item requested.

NOTE: PeopleSoft ERP systems only.

In the **Item Picks** screen the substitute item will display as red * user will not see the original ordered item **Figure 36**

| **Figure 36** | **Figure 37** | **Figure 38** |

To pick the Substitute item a user *TAPS* the red item in the grid (or scan) and the Substitute Popup displays Figure 37

User then scrolls to select storage location (if multiple available) and enters the Pick Qty.

TAP the [Save] button and **Figure 38** appears.

HHT user will be returned to Item Picks screen to finish picking order or to click Status to return to Pick Status screen to send information to the ERP system

Zone Picking

Some organizations may perform picking by zones, so they want to allow for users to pick only from certain areas of the warehouse. This can be done but requires supervisors or an @Par Administrator to setup the system to do so.

The actual process on the HHT is not changed, only how the data is downloaded to the HHT.

Supervisors will first select the following Org Group parameters from the following path:
AtPar → Manage Org Groups → Assign Parameters → PICK

Allocation of Storage Location to Users Required ☑   [When this Parameter is checked Material Storage Locations will be assigned to Zones and the Zones to Users for Picking Operations]

When this Parameter is checked Material Storage Locations will be assigned to Zones and the Zones to Users for Picking Operations

NOTE: If Allocation of Storage Location to users required is checked then the following Org Group parameter **must** be checked

Multiple Users can download the same Pick Plan ☑   [Selection of this parameter will allow multiple users to download the same pick plan]

Once Org Group Parameters are set, unique Zones must be set up with their respective Storage Locations assigned.

From the @Par Web the supervisor will access the **Setup Storage Location Groups** to set up friendly and unique zone areas

Once the zones are set up the supervisor then uses the **Assign Storage Locations** menu option which allows them to assign storage locations to the Zone/s.

After new zones have been created, the next step is to assign the users to zones they will pick from.   User can be assigned to multiple zones.

As previously mentioned there is no change to the HHTs. But if all parameters are checked and user attempts to pick a plan with storage locations not assigned, they will receive the following message.

Figure 39

Session Expiration

You will receive the popup message below (**Figure 40**) if you have exceeded the idle time allotted to you by the @Par Administrator. The @Par Administrator manages the HHT and login idle times and if you are experiencing frequent expiration message ask them to increase this setting.
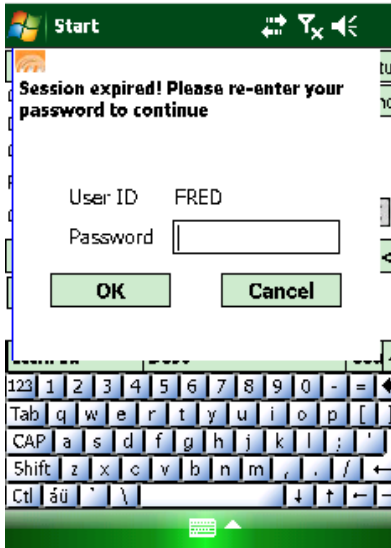

Figure 50

This is in place for a couple reasons:

1. If the session is left logged in, ANYONE could come to that HHT device and start entering information etc. So it is set up for Security Purposes.
2. HHT/System Performance. We have found that by having an inactive session time out, the performance of ALL HHTs and System is increased.

User needs to enter their password and return to the application.