

Cloud/WMS Ver3. 1

Operation Manual (Common)

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Version 10

LOGISTEED Solutions, Ltd.

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< <version history="">></version>		
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2/28/2015	Ver. 2	"Item Master Upload" added, misc. screens and reports revised
7/1/2015	Ver. 3	Update version release
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1/21/2019	Ver. 10	Improve wording, etc.

Introduction

This document explains the operating procedures, description of each screen, etc. for the use of ONEsLOGI Cloud WMS.

The following is used, for your convenience, to explain steps in operating procedures:

[NAME] Square brackets represent button names <NAME> Angle brackets represent screen names

SD Smart Device

Please review Operation Manual (PC) for explanation of all standard WMS functions.

For troubleshooting tips, please review **Operation Manual (Help)** or contact your system administrator for further assistance.

Common Features	

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Common	Features	Ove	rview

This document explains the various common features used throughout the system.

These are features not described in Operation Manual (PC).

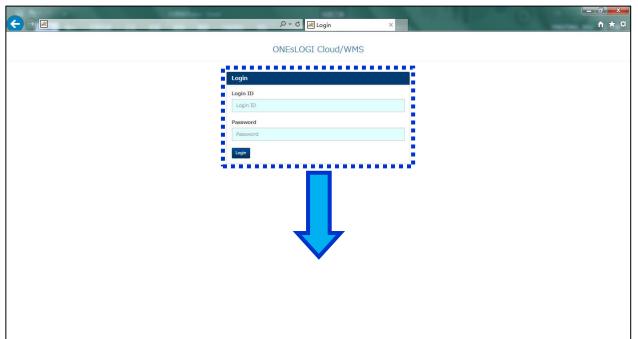
1. Login

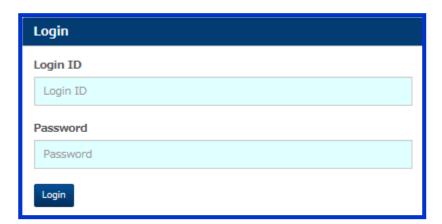
1.1. How to login

This section explains the steps to login and access the WMS.

Contact your system administrator for an address to the login screen.

(1) Open the login screen.





(2) Enter your user credentials in "Login ID" and "Password", then click [Login].

If you do not know your login ID and password, please contact your system administrator.

2. Basic Screen Functions

2.1. System Limitations

Please be aware of the following actions when using ONEsLOGI Cloud/WMS.

- (1) When a button is clicked, wait until the process is complete before performing the next operation.

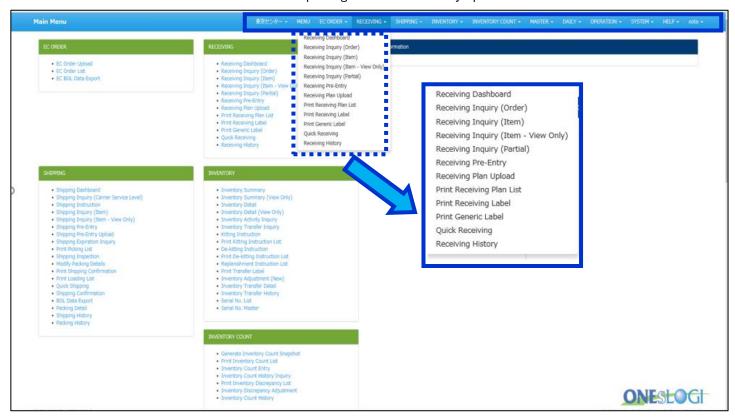
 There is a possibility the process will perform twice when a button is clicked twice.
- (2) Hitting (F5) on your keyboard or clicking the browser refresh button will reset the screen back to its original state. Any unsaved data will be lost.
- (3) A process that has started after a button is clicked, cannot be cancelled by hitting the browser back [←] button or close [×] button and will continue to process even after the screen changes. To cancel/amend a process, review the particular function in Operation Manual (PC). Contact your system administrator if the issue cannot be resolved.

2.2. Main Menu

Various operation functions are accessible from the <Main Menu> screen.



The menu is also accessible from the top navigation bar within any operation function.

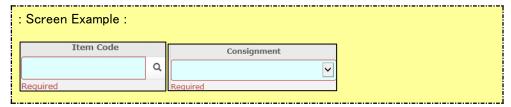


2.3. Input Validation

Some fields are validated for their input to ensure data integrity. An error message will be displayed below any fields that do not meet the input requirements.

The following is a list of validation types:

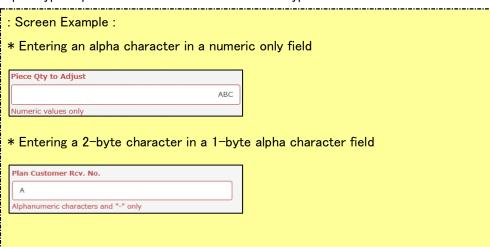
(1) Required: Input field is required and cannot be left blank.



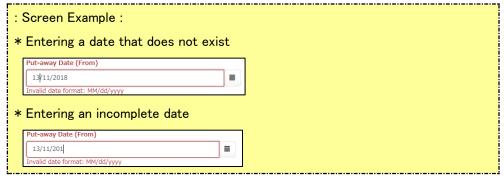
(2) Number of Digits: Input value cannot exceed a defined maximum.



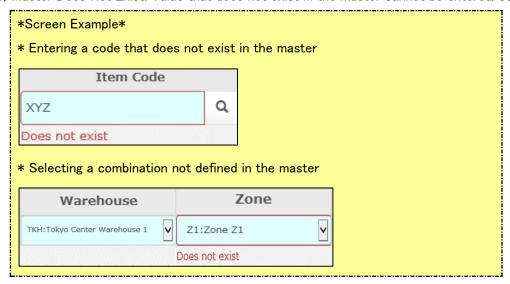
(3) Input Type: Input character must be the correct type.



(4) Input Format: Input character must follow a defined format.



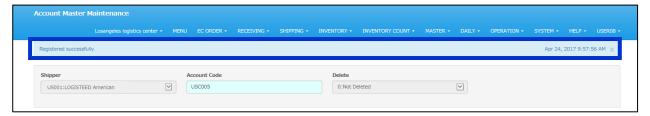
(5) Master Does Not Exist: Value that does not exist in the master cannot be entered/selected.



2.4. Process Result Status Message

A status message is displayed at the top of the screen upon completion of a process.

(1) Success: Process completed successfully. Message is displayed in blue.



(2) Error: Process did not complete successfully. Description of error is displayed in red.

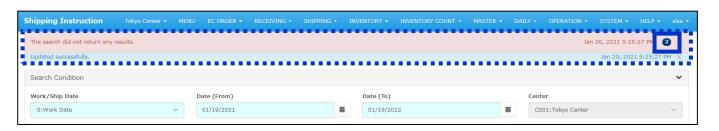


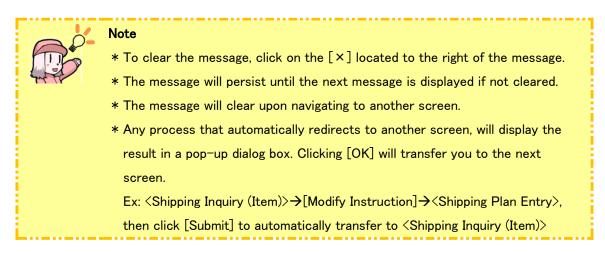
(3) Warning: Process completed but with warnings. Description of warning is displayed in yellow.



(4) When there are multiple messages, the number of messages will be displayed on the right side. Click the number to display all messages.

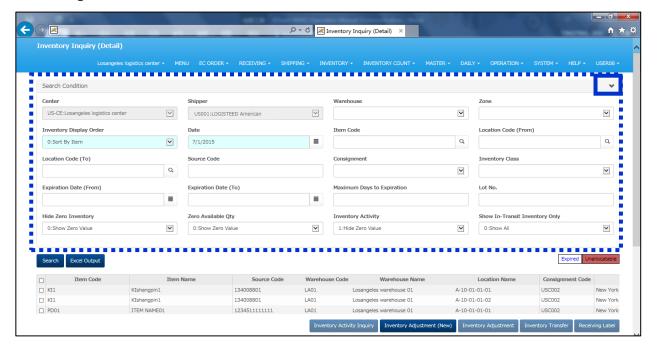


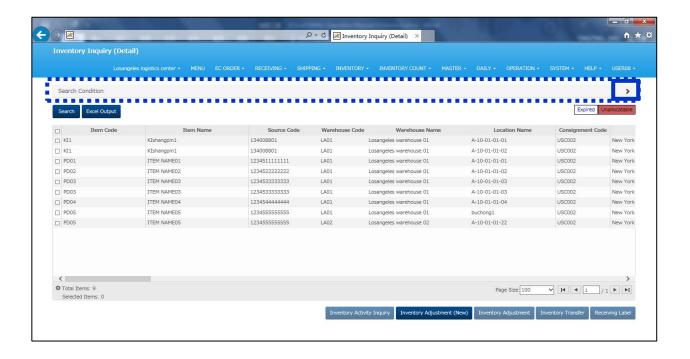




2.5. Expandable/Collapsible Panels

Clicking on buttons will expand or collapse the panel group. Use this to maximize the grid on the screen.





2.6. Search Assist Button

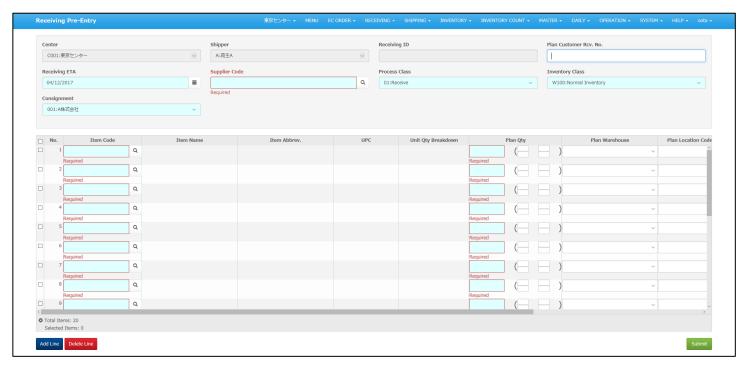
[Q] is a lookup function for various master data.

The following 6 types of master data are available for lookup. A lookup modal for the appropriate master data will display with search conditions to narrow down the results.

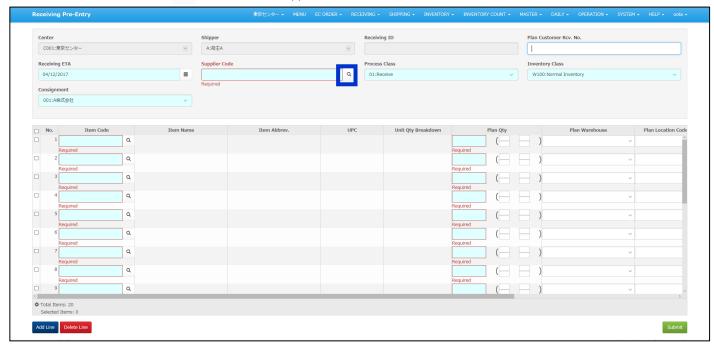
- Item Master
- Supplier Master
- Ship To Master
- Location Master
- Postal Code Master
- Carrier Service Level Master

The following explains the usage of [Q]

(1) Navigate to a screen. (Ex:<Receiving Pre-Entry>)

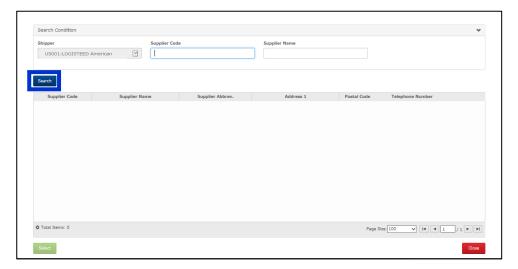


(2) Click on the [Q] next to the Supplier Code field.

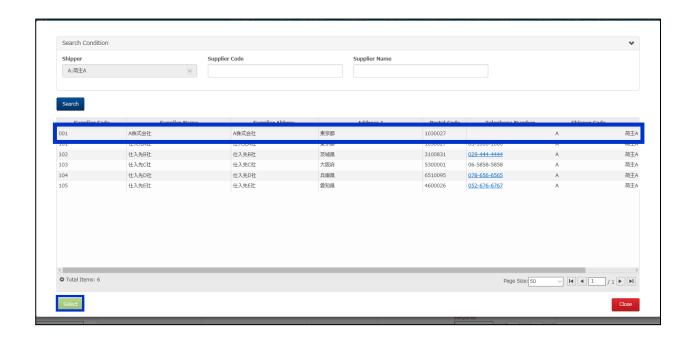


(3) <Supplier Code Search> modal will display.

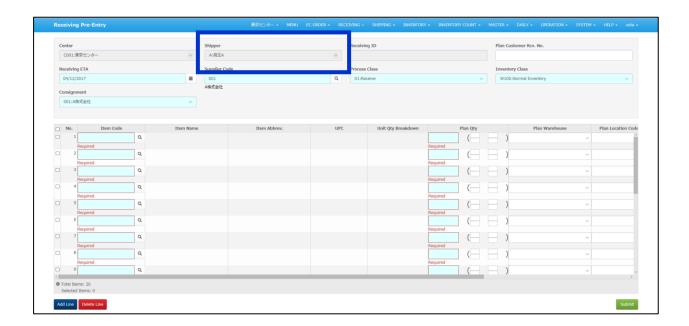
Enter a search condition and click [Search] to display the results.



(4) Click to highlight the record to use then click [Select] or simply double-click the record.



(5) Upon returning to the original screen, the selected record will appear in the field.





Note

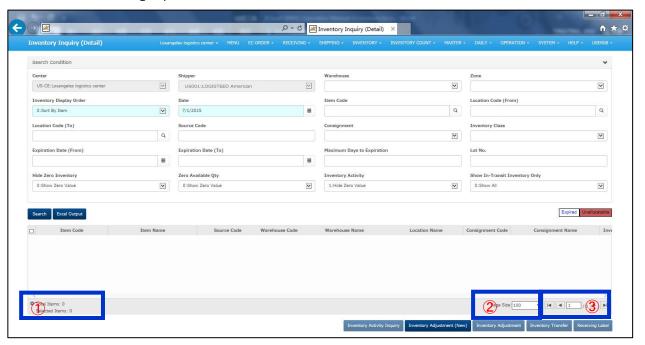
- * The [Q] located in the grid is used the same way as above to obtain code/names.
- * Value in the lookup field is used as a search condition to filter the results accordingly.

2.7. Search Result Grid Paging

At the bottom of the search result grid contains information about the search results.

The standard search result grid has the option to specify page size and jump to a particular page.

The following explains the features in detail.

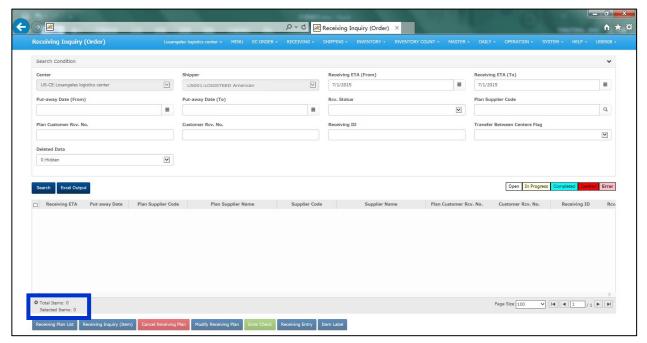


(1) Total number of records	The total number of records in all pages of search
(2) Page size	Select a page size from the drop-down list to show the number of records per page. Search results are cleared out when page size is changed and must be resubmitted.
(3) Page navigation	 : Jump to first page. : Jump to last page. Jump to the page number entered. : Move to the next page. : Move to the previous page.

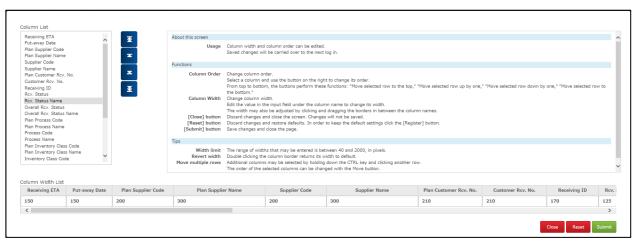
2.8. Search Result Grid Columns

Clicking [🌣] will open a modal to edit the grid column display.

(1) Click [🌣] in the left lower corner of the grid.



(2) A pop-up modal to change column order and width of columns will display.



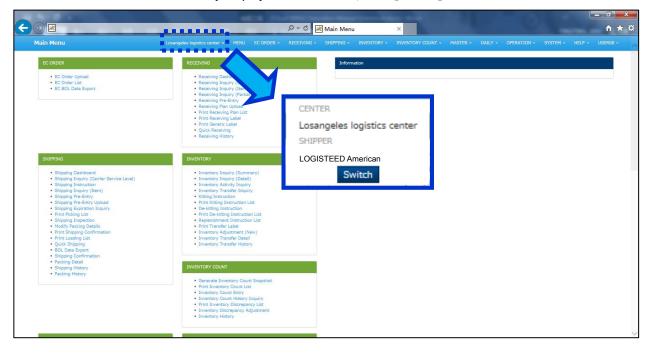
(3) To save your changes, click [Submit] to return to the original screen. The changes will take effect immediately. These changes are effective per grid and saved only for the current user.

2.9. Switching Centers/Shippers

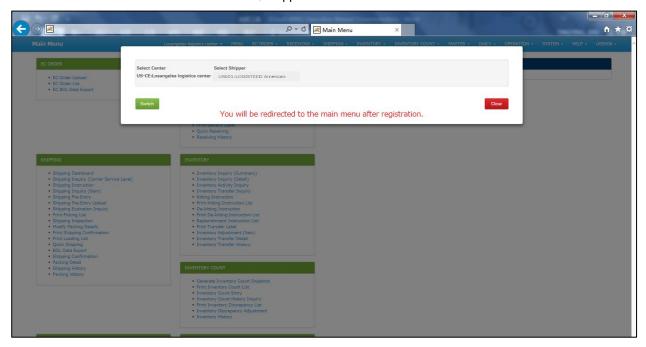
Once inside into the system, you can switch center/shipper to one different from your login.

The following steps shows how to switch to another center/shipper.

(1) Click on the currently displayed center name, then [Switch].



(2) Select center and shipper in the modal then click [Switch]. All subsequent processes will take effect on the switched center/shipper.



2.10. Double-click Features

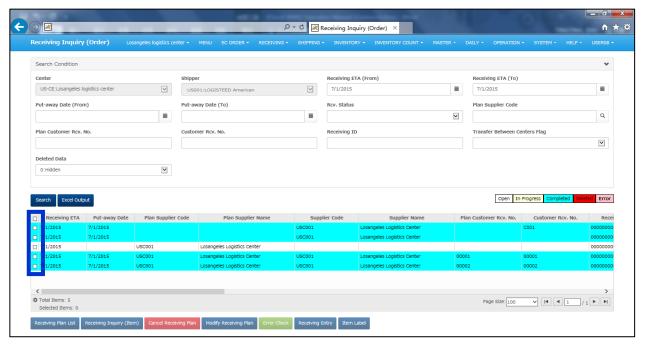
Line items inside a grid can be double-clicked to perform specific features.

Double-clicking a line item will transfer you to another screen.

The destination/action depends on what process is being performed and is described in further detail under the appropriate process section within **Operation Manual (PC)**.

2.11. Checkbox in Search Result Grids

Line items inside a grid may contain a checkbox field to the left of every row.



Select 1 row Ex: Modify Receiving Plan, Inventory Adj. - to only process one row

Select multiple rows | Ex: Shipping Instruction, Upload data, etc. - to process multiple rows at once



Note

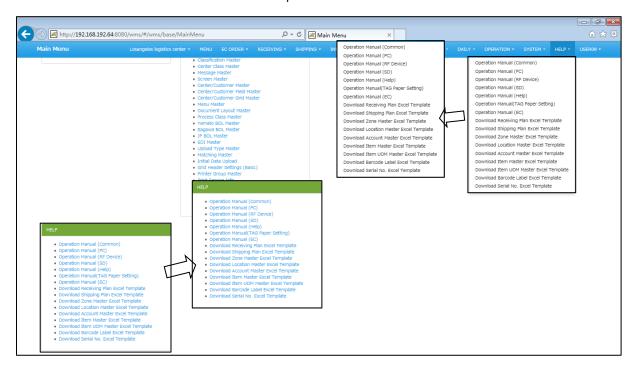
- * Click the checkbox in the column header (shown in gray) to check all rows at once.
- * Click a second time, while all rows are checked, to uncheck all rows.

2.12. Excel Format for Data Uploads

All Excel templates can be downloaded from the Help menu section.

The following are the download steps from <Main Menu>.

- (1) The following Excel templates are available for download from the help menu section:
 - "Download Receiving Plan Excel Template"
 - "Download Shipping Plan Excel Template"
 - "Download Zone Master Excel Template"
 - "Download Location Master Excel Template"
 - "Download Account Master Excel Template"
 - "Download Item Master Excel Template"
 - "Download Item UOM Master Excel Template"
 - "Download Barcode Label Excel Template"
 - "Download Serial No. Excel Template"



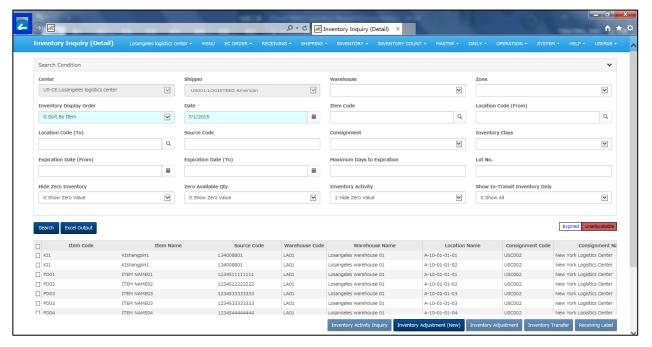
(2) Download the file. Select [Open] immediately open the file or [Save] to save to a location on the local machine.



(3) Edit the contents and save the file. Find the appropriate screen to upload: <Receiving Plan Upload><Shipping Plan Upload><Zone Master><Location Master Upload><Account Master Upload><Item UOM Master Upload><Batch Output Barcode Label><Serial No.>.

2.13. Browser Back Button

Click on the browser back button $[\leftarrow]$ to return to the previous page.

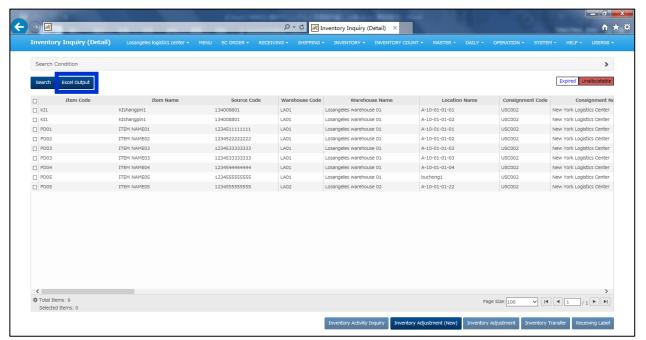


3. [Excel Output] Export

Clicking [Excel Output] will export search results in Excel format.

The following are the steps to export and save an Excel file.

(1) Enter search conditions to filter, then click [Search]. (Ex: <Inventory Inquiry>) Verify search results exist, then click [Excel Output].





Note

* Clicking [Excel Output] will export all search results, regardless of results being visible or not on screen.

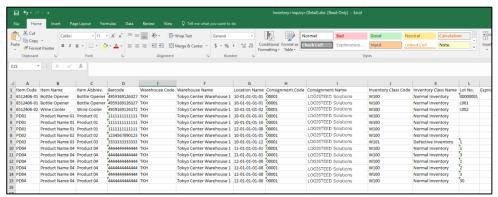
(2) Select Open or Save, if prompted, to begin downloading the file.





Note

- * Open: Automatically opens the file upon download.
- * Save ▼Save: Saves the file to the default download location.
- * Save ▼Save as: A prompt to specify a location and filename will display.
- * Save ▼Save and open: Saves the file to the default download location then automatically opens the file.
- (3) Sample Excel export data





Note

* Change the cell format/background color/borders to your preference.

4. [File Upload] Function

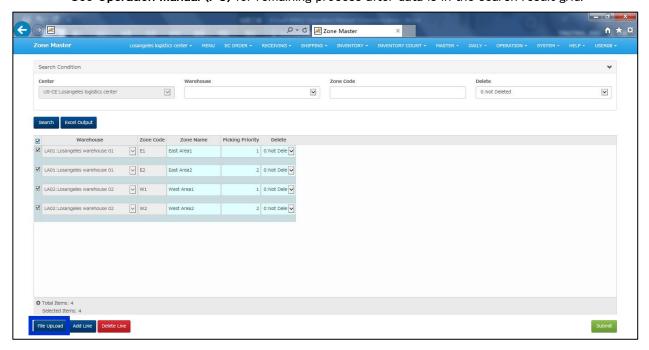
Clicking [File Upload] imports data from an Excel file(or a CSV file) into the grid to be saved into the system.

The following explains the process to upload the data from a file.

(1) Click [File Upload] to select a file to upload. (Ex: <Zone Master>)

Uploaded data will be shown in the search result grid.

See Operation Manual (PC) for remaining process after data is in the search result grid.





Note

- * Uploaded data can be modified directly in the search result grid.
- * All uploaded data will be marked with a checkbox by default.
- * Submitting existing data will update the existing record while new data will create the record in the system.
- * It is not necessary to match the order of rows in the search grid to the file.

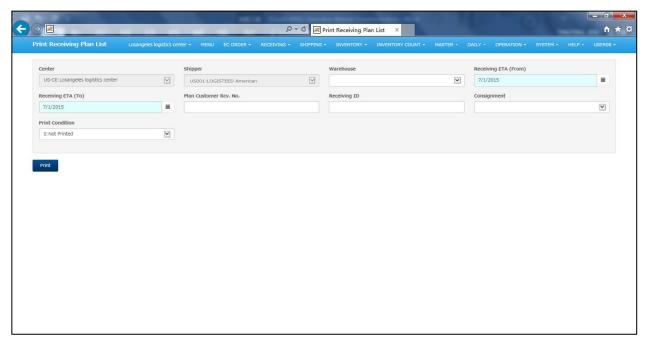
5. Issuing Documents

5.1. Preview and Download

You can preview and download documents that are issued from the system.

The following explains the process to issue documents.

(1) Navigate to one of the document issuing screen. (Ex: <Print Receiving Plan List>) Specify the issuing conditions and click [Print].



(2) Click [Preview] in the <Preview> modal to display the document.

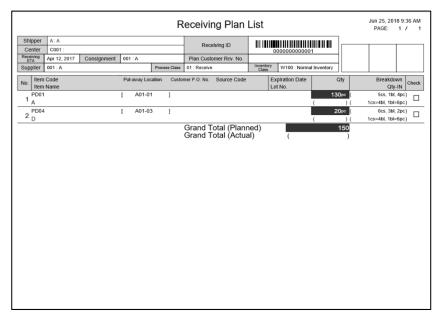




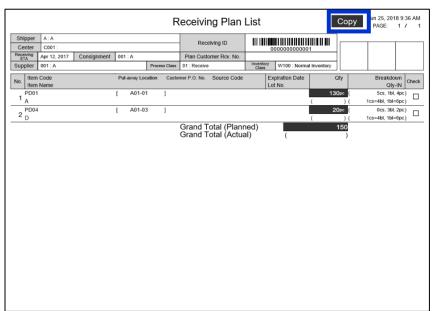
Note

* Click [Close] to cancel without issuing the document.

- (3) The document is displayed in another screen. Reprinted documents will be marked with [Copy].
 - a) Example of a newly issued document



b) Example of a reprinted document

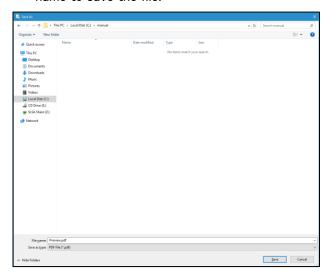




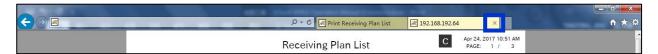
Note

* To reprint a document, change the "Print Condition" to either "Printed" or "All" then click [Print].

(4) To download, select "Save As" from your browser File menu, then specify a location and file name to save the file.



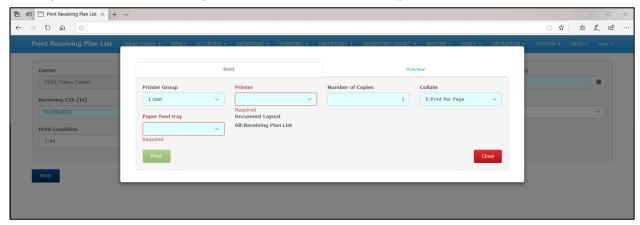
(5) After you finished previewing or downloading, close the tab that automatically opened by clicking on the [X] button.





Note

- * Even if you click the return button [←] on the browser with document displayed, please click the close button [X] on the tab.
- (6) To print, select "Print" from your browser menu then select a printer.





Note

* Documents are created to fit a Letter size paper. Please check your printer settings before printing.

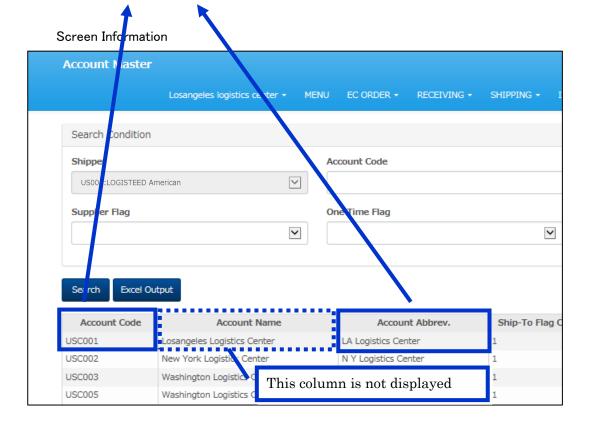
5.2. Contents of Certain Fields in Documents

Documents used in warehouse operation may contain abbreviated names in place of full names.

Output Ex:

Document

Shipper	US001:LOGISTEED American	Description ID	
Center	US-CE : LA logistics center	Receiving ID	000000000301
Receiving ETA	Jul 1, 2015	Plan Customer Rcv. No.	
Consignment	USC003: Wash Logistics Center	Inventory Class	W100 : Normal Inventory
Supplier	USC001 LA Logistics Center	Process Class	01 : Receive

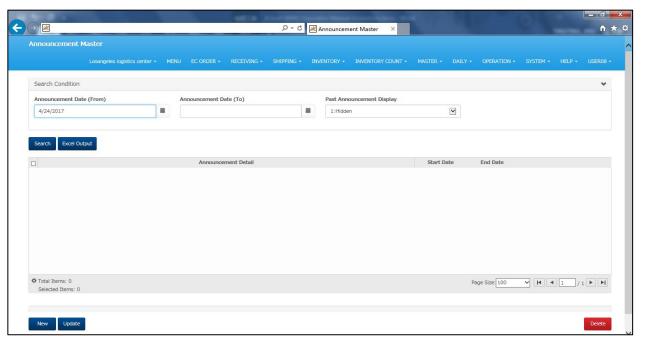


6. Announcement Feature

In <Main Menu> there is an "Information" section to display a message.

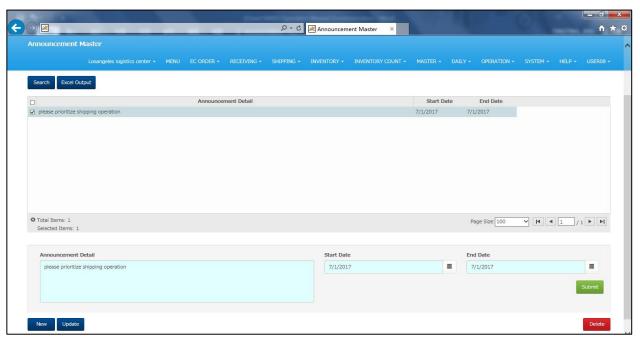
The following explains the steps to use Announcement Master.

- (1) Navigate to the <Announcement Master> screen:<Main Menu> → Master menu section → <Announcement Master>
- (2) Enter search conditions in the appropriate fields, then click [Search] to display the results in Announcement Master>.

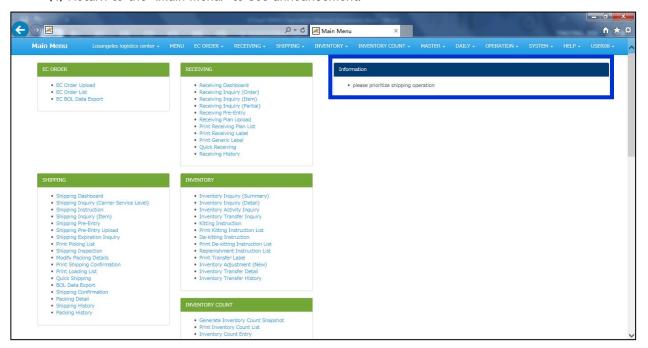


(3) Click [New] or select an existing record and click [Update].

Enter the announcement contents and specify a start and end date, then click [Submit].



(4) Return to the <Main Menu> to see announcement.





Note

* Announcements before the start date or after the end date will not be displayed.

7. Master Maintenance (Shipper, Center)

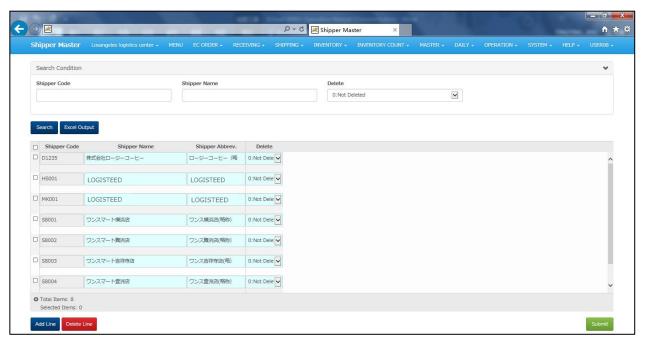
Shipper and Center are configured during initial setup.

To modify, add, or delete any of the information, please contact your system administrator.

The following is for reference only.

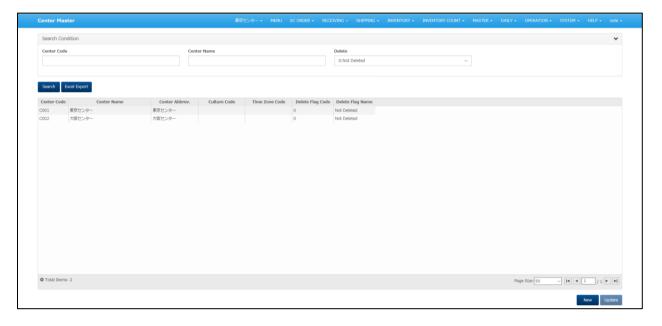
7.1. Shipper Master

- (1) Navigate to the <Shipper Master> screen:<Main Menu> → Master menu section → <Shipper Master>

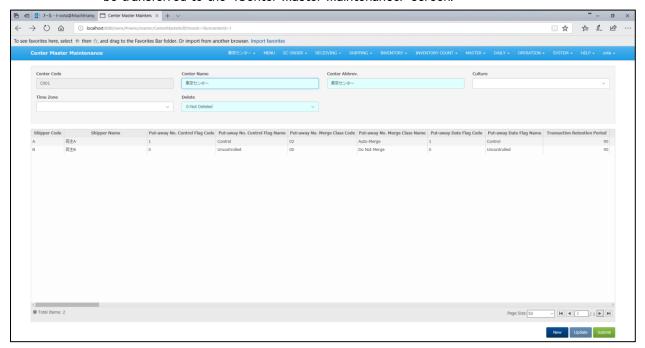


7.2. Center Master

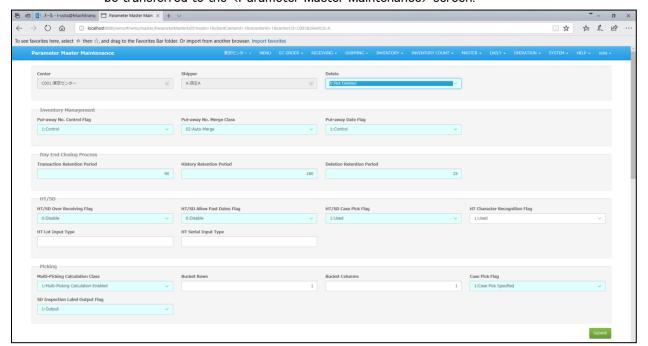
- (1) Navigate to the <Center Master> screen:
 - <Main Menu> → Master menu section → <Center Master>
- (2) Enter search conditions in the appropriate fields, then click [Search] to display the results in <Center Master>.



(3) Click [New], select an existing record and click [Update] or double-click an existing record to be transferred to the <Center Master Maintenance> screen.



(4) Click [New], select an existing record and click [Update] or double-click an existing record to be transferred to the <Parameter Master Maintenance> screen.





Note

* Specifying a Case UOM allows items to be managed at the case level.

8. System Requirements

To use the system at its intended state, we recommend the following system specifications.

Display Size	HD 1080P (1920 × 1080)
	This system is designed in an environment using HD 1080P display at 100% zoom level and normal font size. Different settings may result in poor user
	experience, such as:
	* Menu being cutoff
	* Buttons becoming hidden
	* Overlapping scroll bars and fields
os	Windows 10 or later
Browser	Microsoft Edge



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