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Deltek Costpoint - Issue to Projects
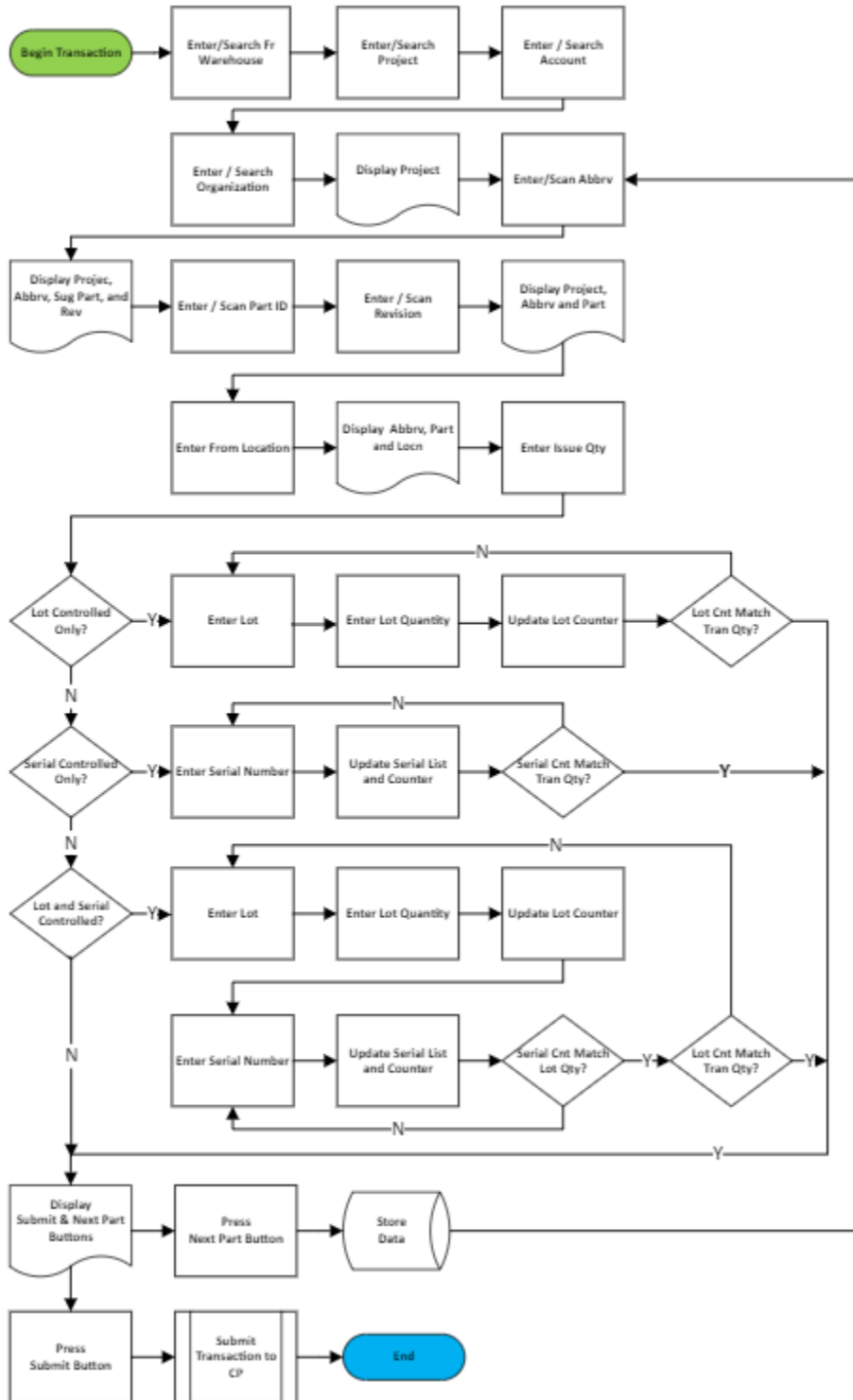
This application will issue parts to a Project without a reservation.

RFgen Functional Documentation
2022

RFgen provides its customers Costpoint-validated, ready-to-use suites of applications and a development environment that can be used to create new apps or to modify existing apps.

This document describes the business workflow and technical information used in this application.

Costpoint: Issue to Project Workflow

FIMII0300 – Issue to Project

This application will issue parts to a Project without a reservation.

Description of Workflow

Navigating the App

If you are on the first field, the **back arrow** in the upper left corner, returns you to the menu. For all other fields, <u>unless otherwise noted</u>, the back arrow button takes you to the previous field/page.

The **Next** button takes you to the next prompt or action.

As the user progresses through the application, the values are posted at the top of the page.

Workflow Details

First the Warehouse field displays, and the warehouse is defaulted from the user's profile. The user can change the warehouse if desired.

The user then enters, searches, or scans the project, the account, and the organization.

The project displays above the Abbreviation field. The user enters, searches, or scans the abbreviation.

The abbreviation is added above the Part field and Revision field. The user enters, searches, or scans the part number. If the part only has

one revision it will be defaulted; otherwise, the user enters, searches, or scans the revision number.

The part number is added to the list at the top of the app. The Location field displays, and the user enters, searches, or scans the location from which the parts will be issued.

The location is added to the list on top. The Total Quantity field, Maximum Quantity (available on hand) and unit of measure (UOM) display. The user enters the total quantity that will be issued, and then the cursor advances to the next field.

Depending on how the part is setup, the user is prompted to enter the lots and/or serials until the total quantity to be issued is matched.

If the part is neither lot nor serial-controlled, the lot/serial fields are by-passed, and the user can tap the **Submit** button which issues the parts to the project or, the user can tap on the **Next Part** button to work on the next part.

Lot Controlled, Serial Only, and Lot and Serial-Controlled

- If the part is only lot-controlled, the user enters the lot, then enters the lot quantity until the accumulated quantities entered matches the Total Quantity to be issued.
- If the part is only serial-controlled, the user is required to enter the same number of serials as the Total Quantity to be issued.
- If the part is lot-controlled and serialized, the user enters the lot, then the lot quantity, and the lot counter is updated. Then the cursor advances to the Serials field where the user is prompted to enter serials in the same quantity as the lot quantity that was entered.
- Once the serial count matches the lot quantity, the user is returned to the next lot and repeats the process until the accumulation of lot quantities equals the Total Quantity to be issued.
- Once the Total Quantity is met, the **Submit** and **Next Part** buttons display.
- Tapping the **Submit** button will submit the transaction to issue the parts to the project.
- Tapping the **Next Part** button save the entries and returns the user to the Abbreviation field.
- Tapping the **back arrow** in the upper left corner will return the user to the Total Quantity field.

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Customization Considerations

If you are planning on creating a new version of this application or modifying it for a customer, consider asking these questions to help prepare your list of customization requirements.

1. Are there serial-controlled items?
2. Are there lot-controlled items?
3. Are there default sites/warehouses/etc. users are expected to transfer to/from?
4. Should users be allowed transfer to/from serial or lot numbers? For example, should users be allowed to change an item-specific serial or batch allocation?