# Deltek Costpoint -
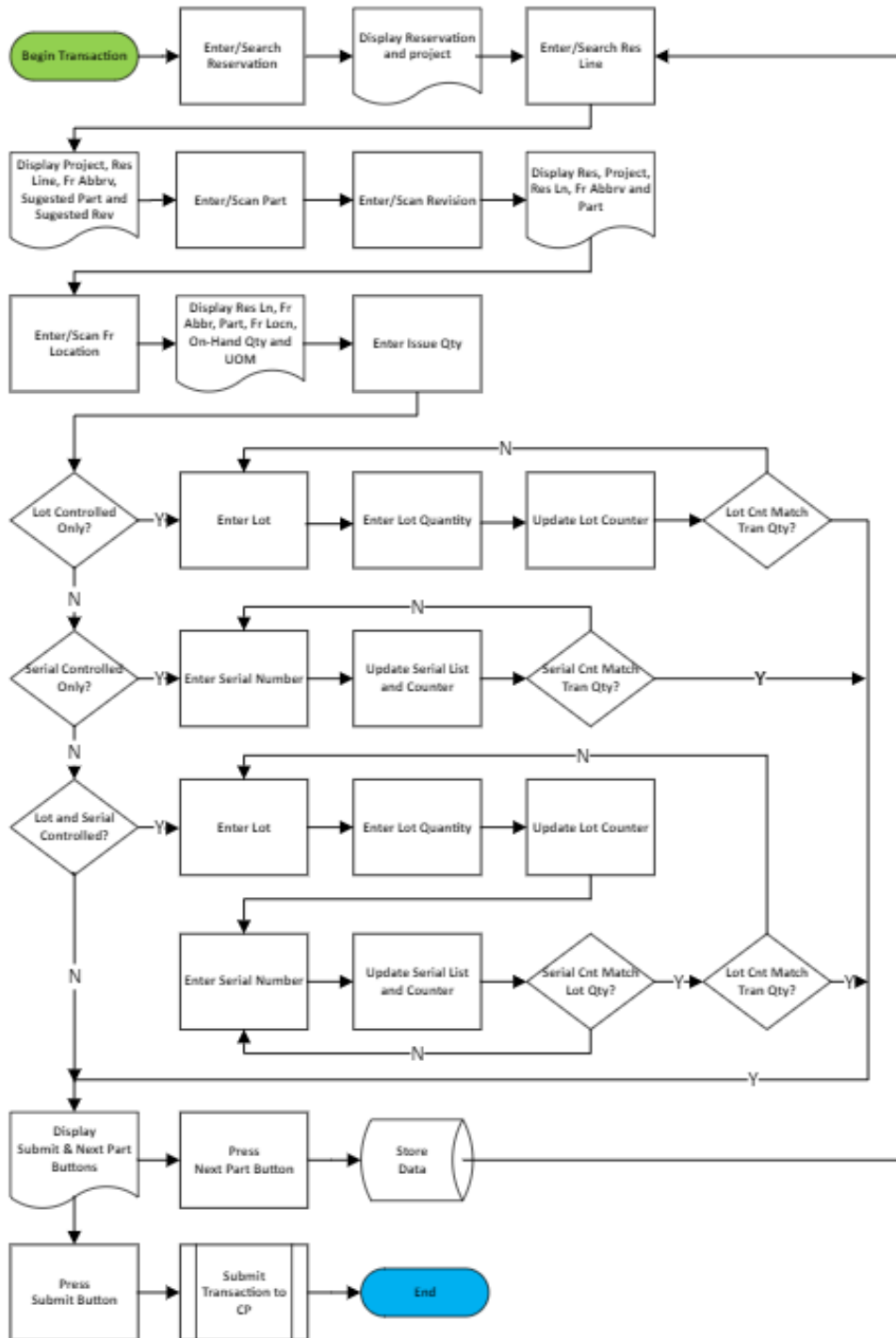# Issue to Projects with Reservations

This application will issue parts to a Project with a reservation.
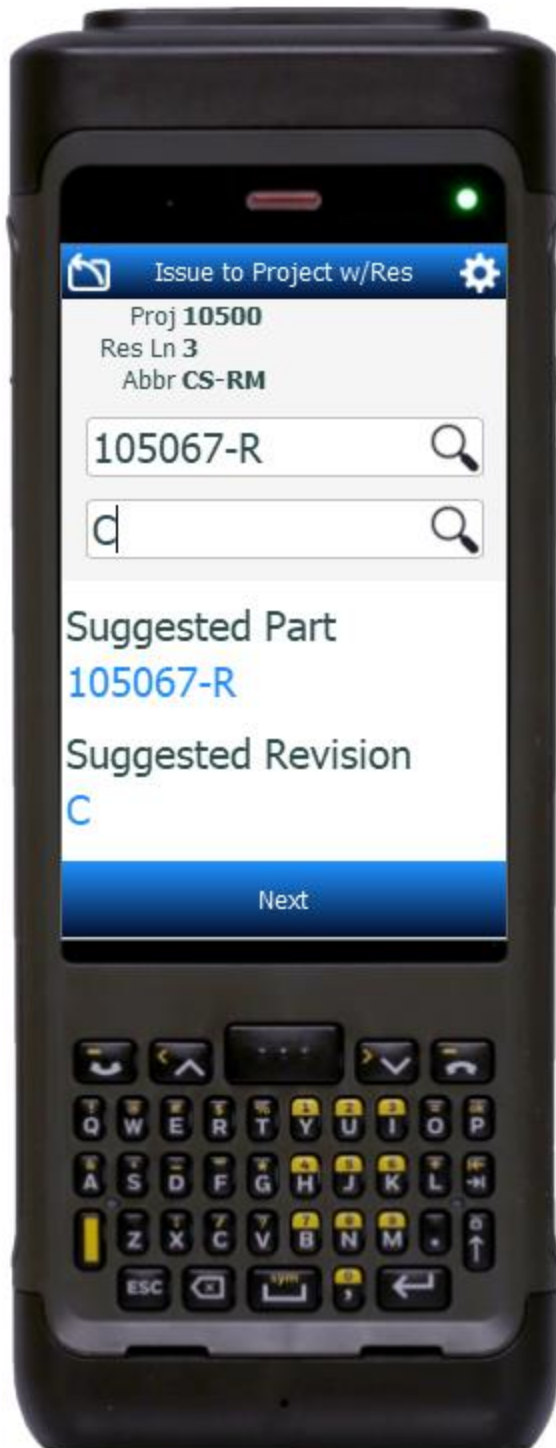
RFgen Functional Documentation
2022

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.

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# Costpoint: Issue to Project with Reservations Workflow

## FIMII0320 – Issue to Project with Reservations

This application will issue parts to a Project with a reservation.

## Description of Workflow

### Navigating the App

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

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

### Workflow Details

First the Reservation Number field displays, and the user enters, searches, or scans the reservation number.

The reservation number and project defaulted from the reservation number are listed at the top of the application. The Reservation Line field displays, and the user enters, searches, or scans the Reservation Line number.

The reservation, project, and reservation line, are listed on top, and the Abbreviation field displays. The user enters, searches, or scans the abbreviation.

The project, reservation line, and abbreviation list on top, and the Part and Revision fields

display. The Suggested Part and Suggested Revision display below the Part and Revision fields. These suggested values are defaulted from the reservation number and line.

The user enters, searches, or scans the part number. If the part only has one revision it will be defaulted. If the revision was not defaulted, the user enters, searches, or scans the revision number.

The Location field displays, and the user enters, searches, or scans the location.

When the Total Quantity field displays it also shows the Maximum Quantity available on hand and unit of measure (UOM). 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, 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 the lot quantity until the accumulated quantities entered matches the Total Quantity to be issued. Then the user taps the **Continue** button.

- 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. Then the user taps the **Continue** button.

- 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. Then the user taps the **Continue** button.

When the **Submit** and **Next Part** button display, the user can either choose to tap the **Submit** button to issue the parts to the project or continue working by tapping the **Next Part** button.

Pressing the **back arrow** in the upper left corner will return the user to the Total Quantity screen.

## 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?