Deltek Costpoint - Scrap Adjustment

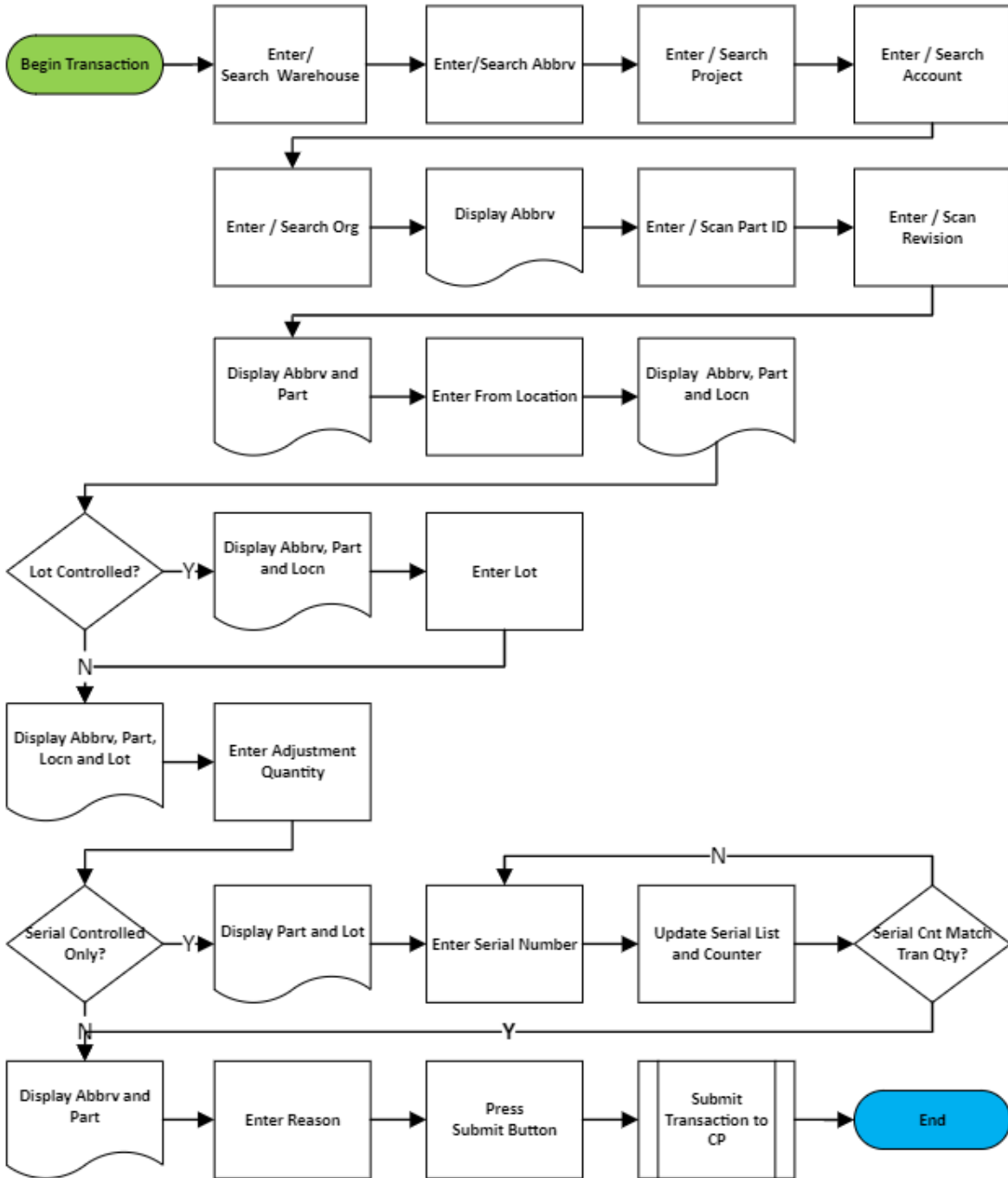This application will do a positive scrap adjustment.

RFgen Functional Documentation
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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: Positive Scrap Adjustment Workflow

Begin Transaction → Enter/ Search Warehouse → Enter/Search Abbrv → Enter / Search Project → Enter / Search Account

Enter / Search Org → Display Abbrv → Enter / Scan Part ID → Enter / Scan Revision

Display Abbrv and Part → Enter From Location → Display Abbrv, Part and Locn

Lot Controlled? —Y→ Display Abbrv, Part and Locn → Enter Lot

Lot Controlled? —N→ Display Abbrv, Part, Locn and Lot → Enter Adjustment Quantity

Serial Controlled Only? —Y→ Display Part and Lot → Enter Serial Number → Update Serial List and Counter → Serial Cnt Match Tran Qty?

Serial Cnt Match Tran Qty? —N→ (back to Enter Serial Number)

Serial Cnt Match Tran Qty? —Y→ Display Abbrv and Part

Serial Controlled Only? —N→ Display Abbrv and Part

Display Abbrv and Part → Enter Reason → Press Submit Button → Submit Transaction to CP → End

FIMIA0300 –Scrap Adjustment

This application will do a positive scrap adjustment.

Description of Workflow

Navigating the application

If the cursor is 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 Warehouse field displays with the value defaulted from the user's profile. The user can change the warehouse if needed.

Then the Abbreviation field displays, and the user enters, searches, or scans the inventory abbreviation.

The abbreviation lists at the top of the application, and the Project, Account, and Org fields display. The project, account, and org values are derived from the inventory abbreviation previously entered.

The Part and Revision field display, and 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 part and revision are added to the list at the top of the screen, and the From Location field displays. The user enters, searches, or scans the from location, and the from location is added to the list at the top.

The field that displays next depends on how the part is setup.

- If the part is not lot-controlled, the Quantity field displays, and the user enters the total quantity to be adjusted.

- If the part is lot-controlled, the Lot number field displays, and the user enters, searches, or scans the lot number being adjusted. The lot is added to the list at the top, and the user is advanced to the Quantity field. The user enters the adjustment quantity.

- If the part is lot and serial-controlled, the part number and lot number previously entered are listed on the top of the screen, and the Serial field displays. The user enters, searches, or scans the serial numbers for items being adjusted. As each serial number is entered, it is added to the top of the list and the counter incremented. The user continues adding serials until the count of serials entered matches the total quantity of items being adjusted.

- If the part is only serial-controlled, the Quantity field displays, and the user enters the total quantity to be adjusted. Then the Serial field displays, and the user continues adding serial numbers until the count of serials matches the total adjustment quantity.

- Tapping the **back arrow** in the upper left corner will reset the data collected for the current line back to the Quantity screen.

- Tapping the **Continue** button advances the user to the next screen.

The Adjustment Reason field displays, and the user enters, searches, or scans the reason code for the adjustment.

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The user taps the **Submit** button to send all the collected data to Costpoint for transacting. Then the application resets the form and returns the user to the warehouse field.

Tapping the **back arrow** in the upper left corner will reset the data collected for the current line back to the 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?

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