# FeneTech, Inc.

# FeneVision® Mobile Inventory User Manual

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# Overview

FeneVision Mobile Inventory is a derivative application of FeneVision Core's Inventory Management designed to be used on handheld barcode scanners with a small screen and has touchscreen capabilities. This application works as an Inventory management application without the limitations of having to be tied to a FeneVision computer on the production/warehouse floor. While using Mobile Inventory, the barcode scanner is capable of Inventory Transfers, Inventory Cycle Counts, and Inventory Inquiries.

# Using Mobile Inventory

## FeneVision Mobile Inventory Step by Step

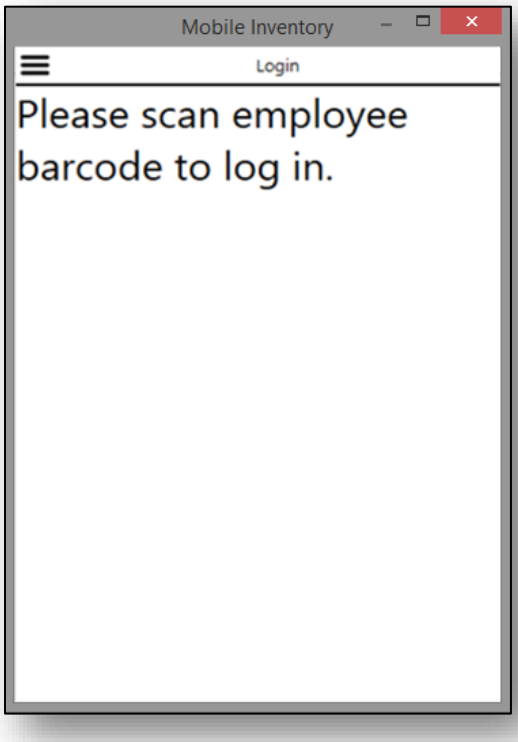
1. Create the user logging into Mobile Inventory in FeneVision Core.
2. Install the Mobile Inventory application on the terminal server.
3. Access the Mobile Inventory application from the handheld scanner screen.
4. Scan the employee barcode for the employee logging into the application
5. Select the desired mode from the following: 'Inventory Transfer', 'Inventory Cycle Count', or 'Inventory Inquiry'.

   *Note:* At this point, the user can also 'Log Out' through the options screen.

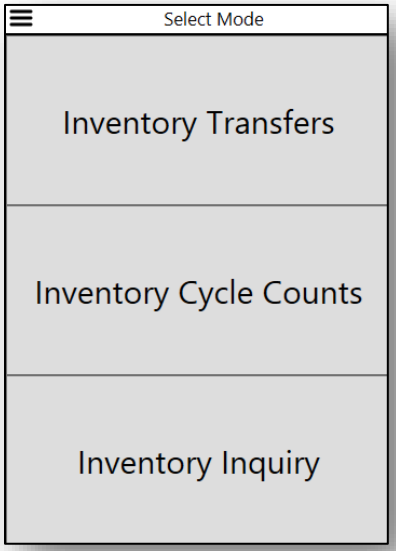
6. Begin scanning items. The result of each scan will depend on the mode the application is running.

## Logging In

Upon opening the Mobile Inventory application, the user must scan their employee barcode to log in. The barcode must be formatted as '#EmployeeID', which can be found in the employee setup screen of FeneVision Core.




Once logged in, the user will be taken to the main screen of the Mobile Inventory application which will allow them to choose one of the follow modes: 'Inventory Transfers', 'Inventory Cycle Counts', or 'Inventory Inquiry'.



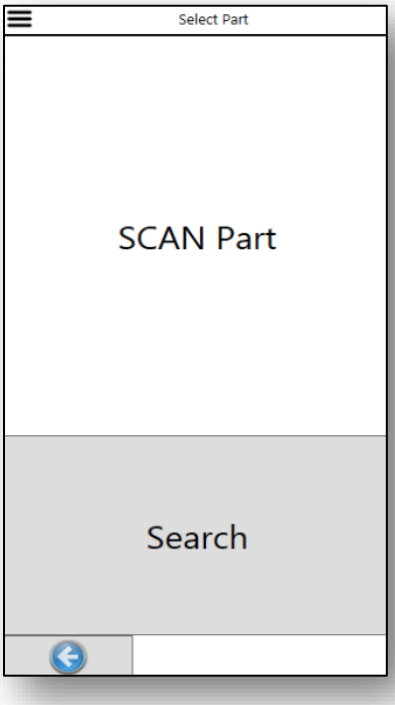

## Inventory Transfers

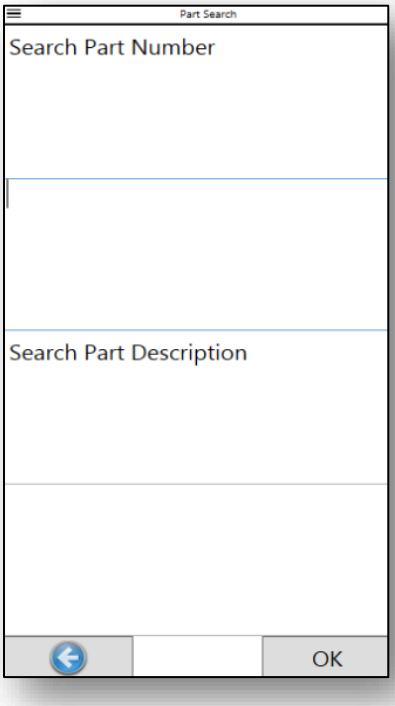
The 'Inventory Transfers' mode allows the user to transfer inventory between locations and/or bins. Users can transfer inventory from one bin location to another within the same FeneVision Core location or to a bin in another location. Inventory transfers may be entered manually or by scanning a part barcode label.

## Select Part

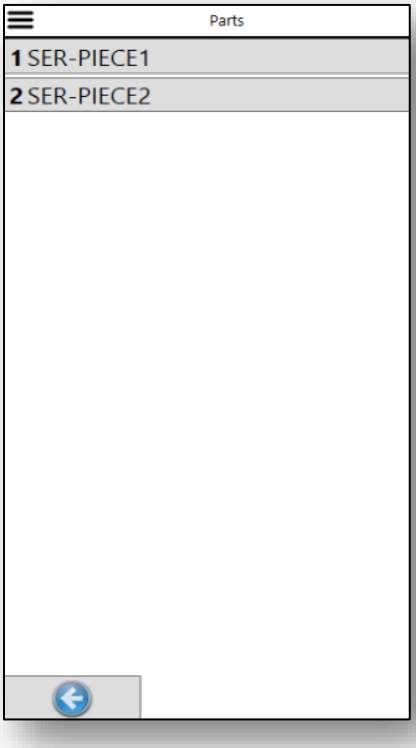
After the user selects the Inventory Transfer mode, the 'Select Part' screen will load. Here the user will either scan a part barcode, 'PARTNUMBER[SUFFIX]' or 'PARTNUMBER', or search for a part by typing the part number and/or part description.

*Note: If using just part number for the barcode, the system automatically assumes the part suffix is [0000].*



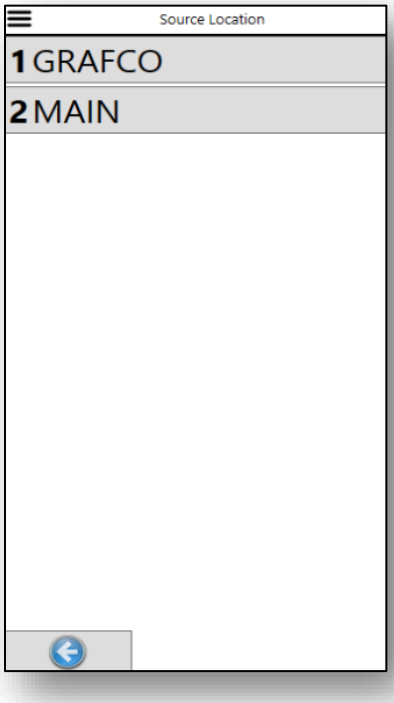




If the user uses the search feature, an additional screen will show allowing the user to select the correct part from a list of parts matching the search criteria.




## Source Location

Once the part has been scanned/selected, the user will be prompted to specify the source location of the transfer. This selection will be limited to the locations that are configured for the selected part. The source location identifies the location of which the inventory will be relieved from.

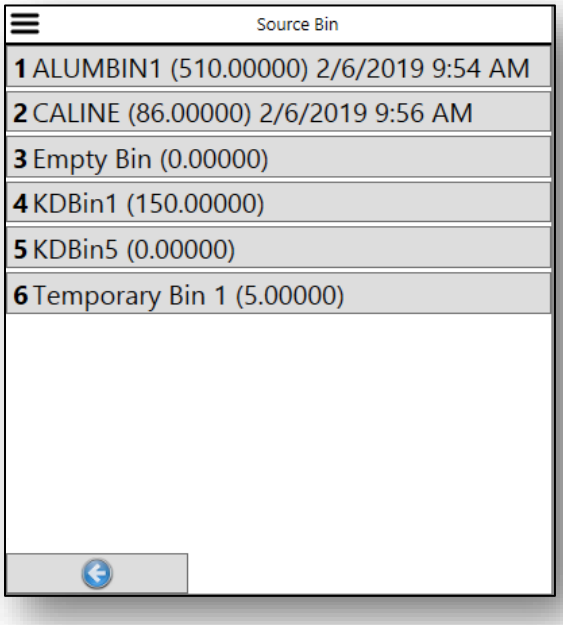



## Source Bin

Once the source location is specified, the user will be prompted to select a bin at that location. This is the bin that will receive the 'Relieve' transaction, as the parts will be removed from this bin to be placed into the destination bin. The user can either scan a bin barcode, 'BINDESCRIPTION', or select the bin using the available bin list. Along with the bins, quantities of the selected part within each bin and the oldest received date and time for the units in the bin will be shown.

If the user scans the barcode of a bin that is either not available at the specified location and/or does not have inventory for the selected part, the user will be prompted to scan a different bin barcode.

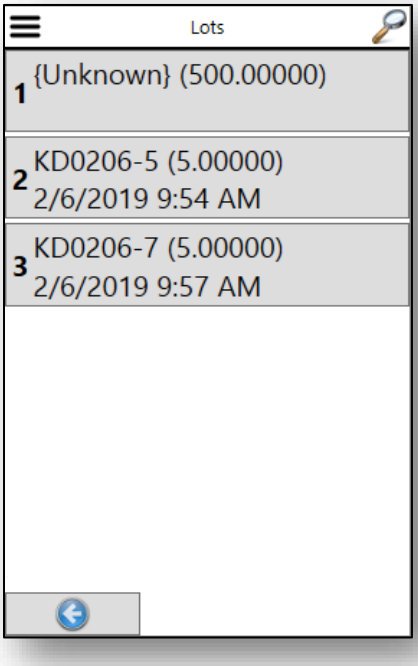
*Note: This screen can be sorted by received date or alphabetically. To change this, select the menu button in the top left corner and select option 2.*




## Lots

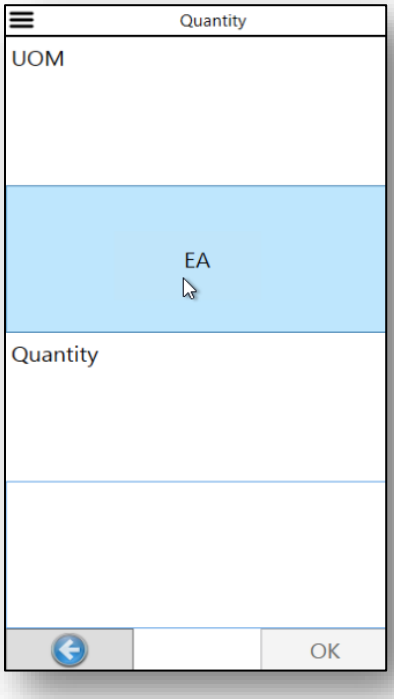
If the selected part is configured for lot tracking, the user will be prompted to select a lot number. All available lot numbers for the configured part, bin, and location will display to be selected, as well as the quantity and oldest received date and time of each lot. If a lot has a quantity of zero (0), it will not show in this list. The user can either scan a lot barcode, 'LOTDESCRIPTION', or select the lot using the available lot list. New lot numbers can also be associated with the part by click the magnifying glass in the top right corner to show the list of lots that are associated with the part but not yet for the bin selected. This lot number will then be associated with the parts that are to be transferred to the destination bin.

If the part selected is not configured for lot tracking, this screen will be skipped.

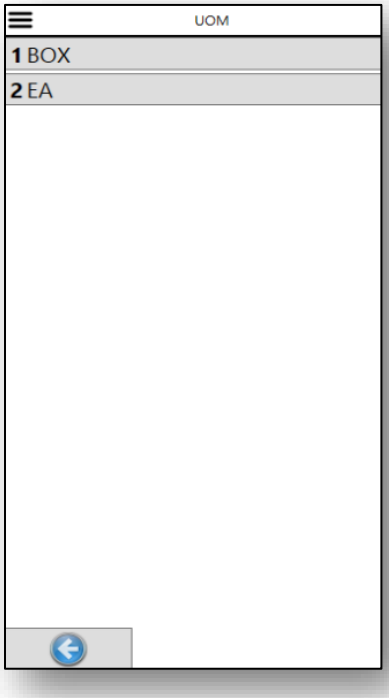



## Quantity & UOM

The Quantity screen allows the user to specify the amount of inventory to be transferred and in which unit of measure. This screen only supports positive numbers and represents the number of parts that will be relieved from the source bin and replenished into the destination bin. The value in this screen should be accurately entered based on the specified UOM; any required UOM conversions are done at the time of transfer submission.

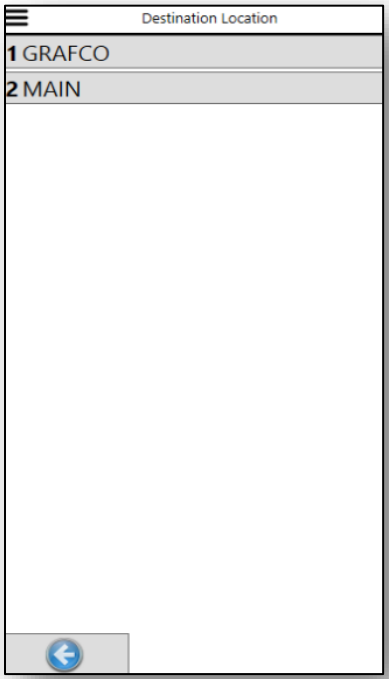



Within the Quantity screen, if a UOM schedule is configured on the part, the user will see the Stock UOM. The UOM used can be changed by selecting the button. The user will then be prompted to select a UOM. All UOMs available for the UOM schedule assigned to the part will be available to select within this screen.




## Destination Location

After specifying the transfer quantity, the user will be prompted to specify the destination location of the transfer. This selection will default to the location selected as the source location and will be limited to the locations that are configured for the selected part. The destination location identifies the location of which the inventory will be replenished to.

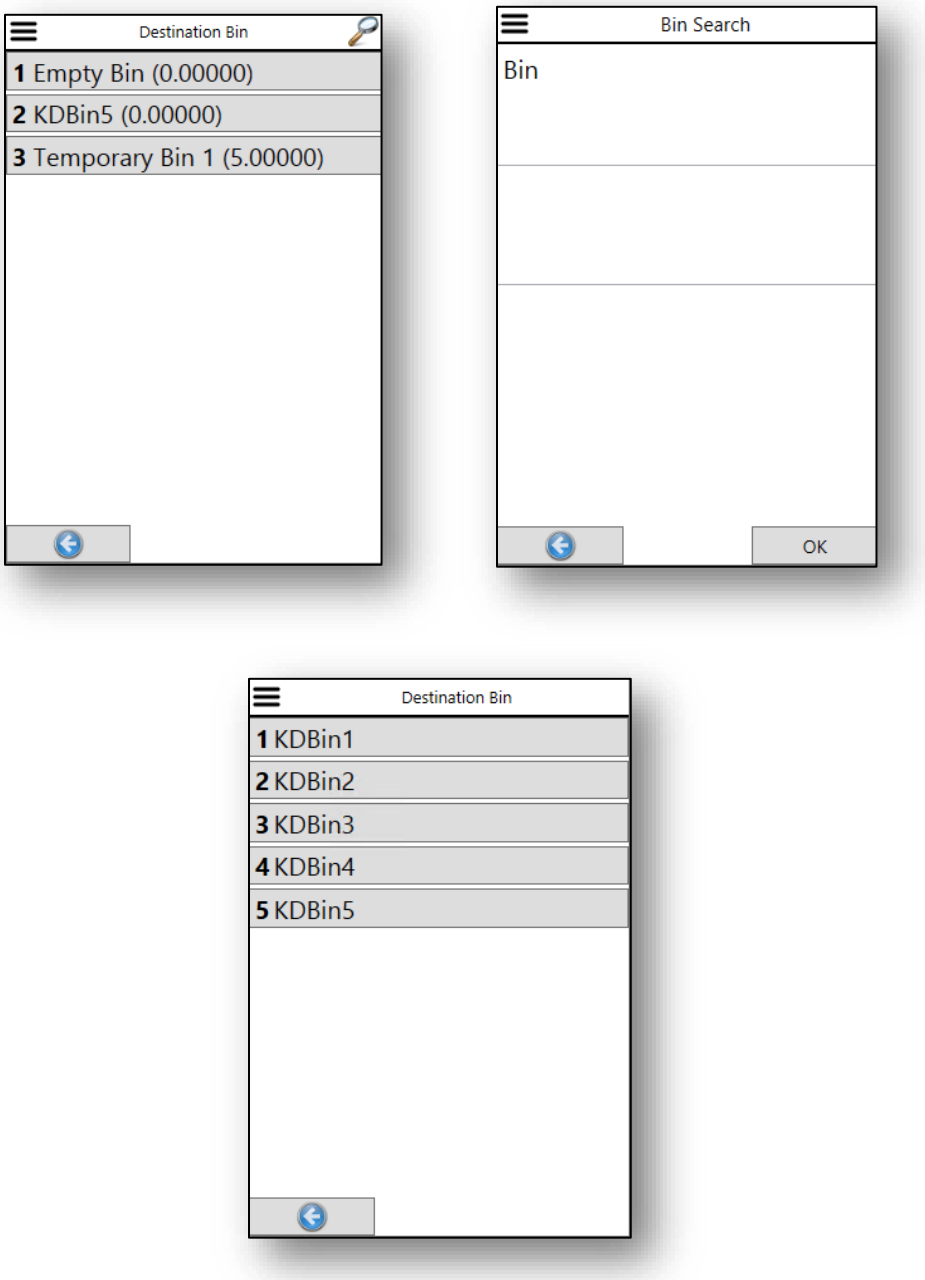



## Destination Bin

After choosing the Destination Location, the user will be prompted to select a bin at the destination location. This is the bin that will receive the 'Replenish' transaction as the parts will be added to this bin from the bin specified as the source bin. The user can either scan a bin barcode, 'BINDESCRIPTION', or select the bin using the available bin list. A new bin can be

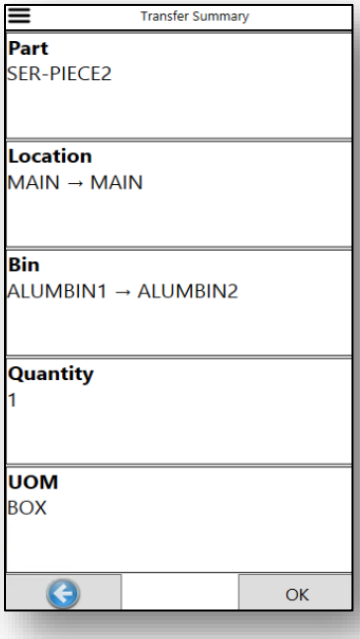
associated with the part so that the part can be transferred into a bin that is not previously configured on the part. By choosing the magnifying glass in the top right corner, the user will be prompted with a list of bins available at the destination location but does not contain the selected part. Along with the bins, quantities of the selected part within each bin will be shown.

If the user scans the barcode of a bin that is not assigned to the part, the bin will be temporarily assigned to the part. The temporary bin assignment for the part will end when the quantity in the bin drops to zero.




## Transfer Summary

Once the user selects a destination bin, the Transfer Summary screen will display with the information chosen by the user. The user can use the back arrows to make any necessary changes. Selecting the OK button will post the transaction.




## Using Inventory Transfer

To create an inventory transfer using a barcode label, complete the following steps:

1. Select Inventory Transfer from the modes screen.
2. Scan the barcode of the part to be scanned.
3. If more than one location exists, select the Source Location.
4. Select the source bin.
5. If required, select the lot number.
6. If needed, change the UOM.
7. Enter the quantity to be transferred and select OK.
8. Select the destination location.
9. Select the destination bin.
10. Approve the transfer summary.

To create an inventory transfer manually, complete the following steps:

1. Select Inventory Transfer from the modes screen.
2. Select the Search button, and type in the part number of description. Then select OK.
3. Select the correct part from the parts list.
4. If more than one location exists, select the Source Location.
5. Select the source bin.
6. If required, select the lot number.
7. If needed, change the UOM.
8. Enter the quantity to be transferred and select OK.
9. Select the destination location.
10. Select the destination bin.
11. Approve the transfer summary.

After approving the transfer summary for either a manual entry or barcode label scan, the application shows a Transfer Complete screen. Once acknowledged, the user will be taken back to the select part screen to scan or search for another part to begin another transfer. Each transfer will take effect as soon as the approval is posted.

## Inventory Cycle Counts

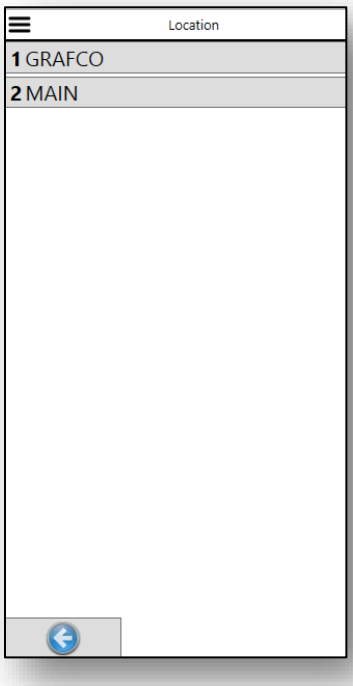
The 'Cycle Counts' dialog allows the user to add entries to an existing cycle count. The cycle count must be created through FeneVision Core before using the Mobile Inventory application to perform a cycle count.

*Note: When using the mobile inventory application for a cycle count, if the same part/bin/cycle count combination is counted more than once, the count will be overridden each time. It is not cumulative.*

## Cycle Count by Part

### *Location*

After the user selects the Cycle Count mode, the location screen will load. This screen allows the user to specify the location in which a cycle count will be completed.

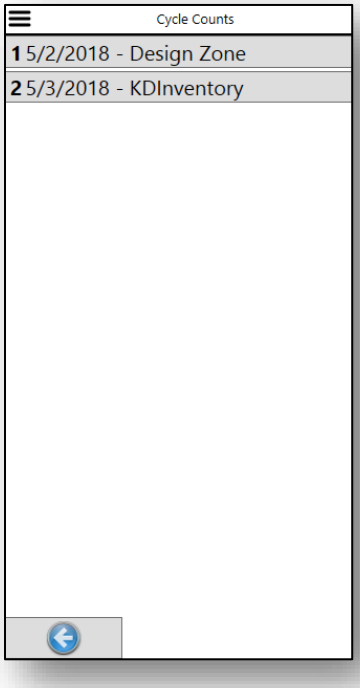



### *Cycle Counts*

The Cycle Count screen displays all open cycle counts that the user is assigned to at the location specified. Cycle counts can only be created within Core, but they can be edited using the Mobile Inventory application.

*Note: There is no locking done so any changes made will override previous information in the cycle count for the selected part.*

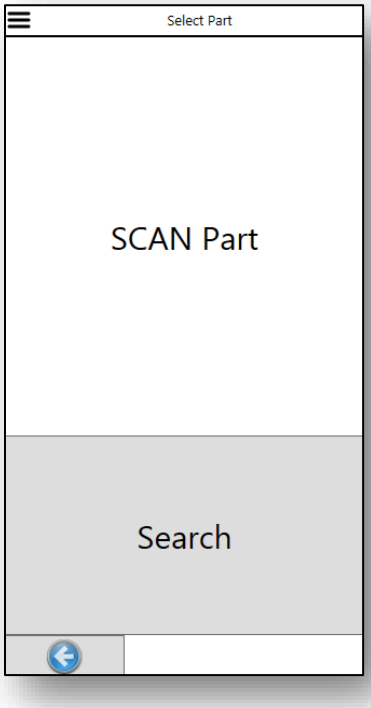
The user will select a cycle count to begin selecting parts and counting.

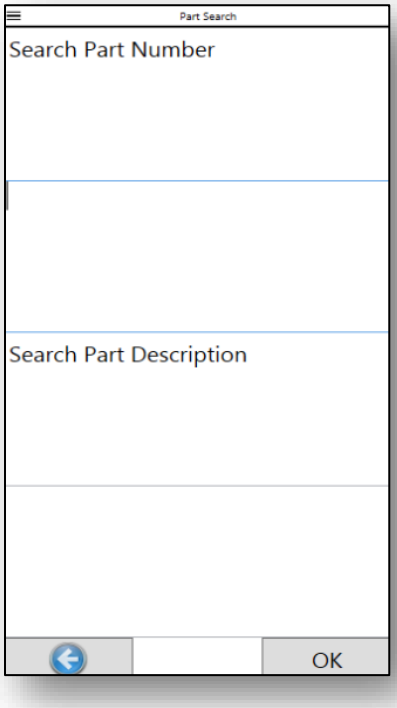



### *Part Select*

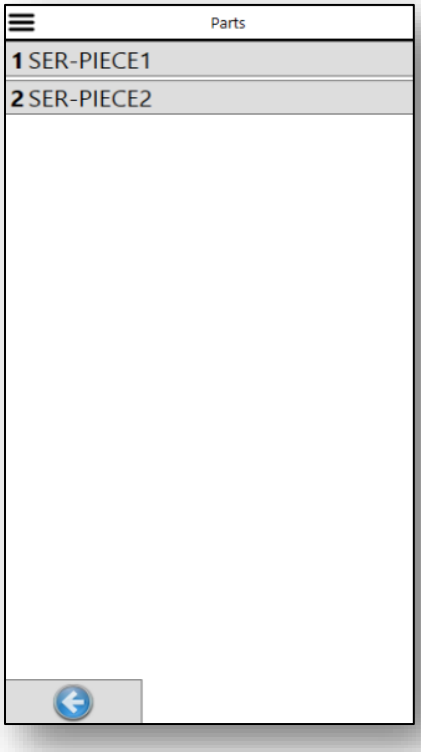
After the user selects a cycle count, the part screen will load. Here the user will either scan a part barcode, 'PARTNUMBER[SUFFIX]' or 'PARTNUMBER', or search for a part by typing the part number and/or part description. This part screen will be limited to the parts that are assigned to the selected cycle count.

*Note: If using just part number for the barcode, the system automatically assumes the part suffix is [0000].*



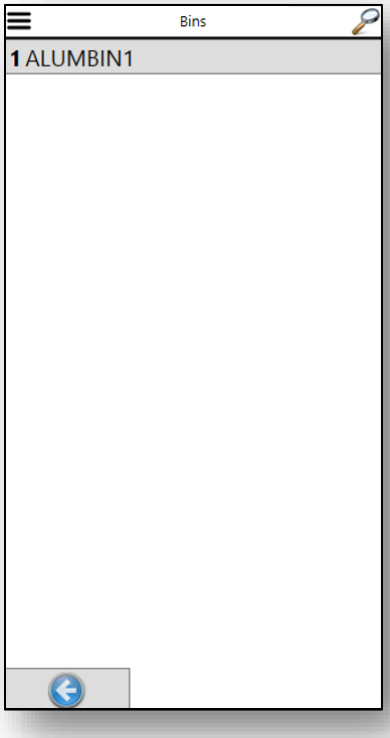

If the user uses the search feature, an additional screen will show for the user to select the correct part from a list of parts matching the search criteria.

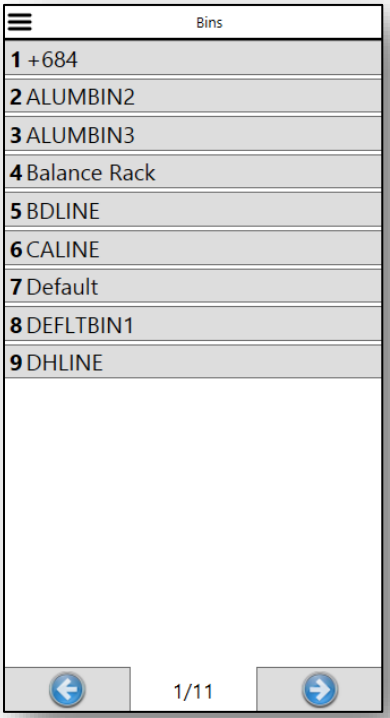



### *Bins*

After selecting the part, the bin selection screen will load. This is the bin that is being counted for the quantity of the specified part. The user can either scan a bin barcode, 'BINDESCRIPTION', or select the bin using the available bin list. A new bin can be associated with the part so that the part can be counted into a bin that is not previously configured on the part. By choosing the magnifying glass in the top right corner, the user will be prompted with a list of bins available at the location specified but does not contain the selected part. Along with the bins, quantities of the selected part within each bin will be shown.

If the user scans the barcode of a bin that is not assigned to the part, the bin will be temporarily assigned to the part. The temporary bin assignment for the part will end when the quantity in the bin drops to zero.



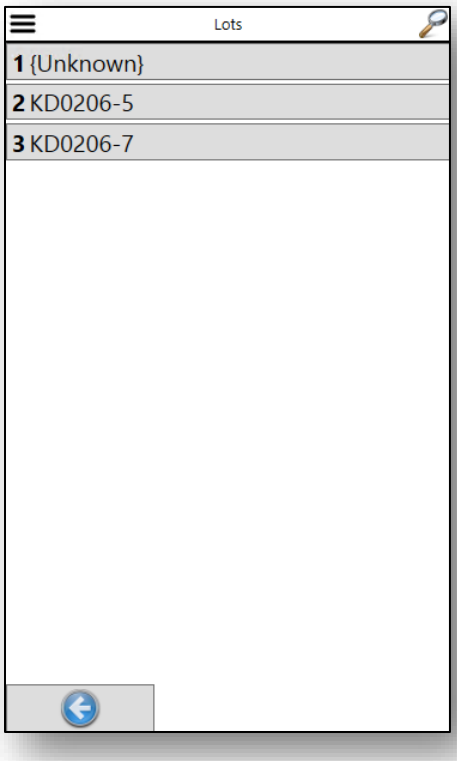




### *Lots*

If the selected part is configured for lot tracking, the user will then be prompted to select a lot number. All available lot numbers for the configured part, bin and location will display to be selected. The user can either scan a lot barcode, 'LOTDESCRIPTION', or select the lot using the available lot list. New lot numbers can also be associated with the part by click the magnifying glass in the top right corner to show the list of lots that are associated with the part but not yet for the bin selected. This lot number will then be associated with the bin.

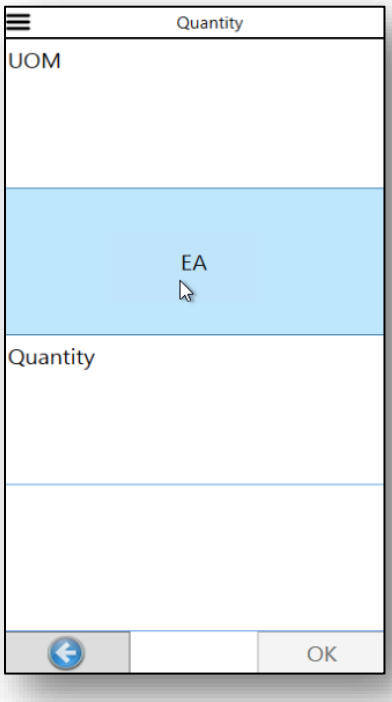
If the part selected is not configured for lot tracking, this screen will be skipped.

If the user scans the barcode of a lot that is not available at the specified location, the user will be prompted to scan a different lot barcode.

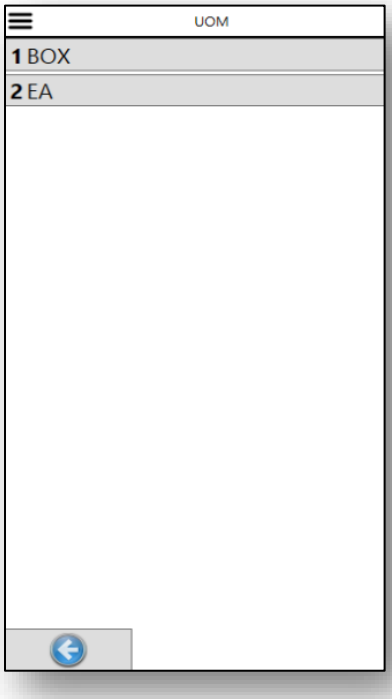



### *Quantity & UOM*

The Quantity screen allows the user to specify the amount of inventory counted and in which unit of measure. This screen only supports positive numbers and represents the number of parts that were counted in the selected location and bin. The value in this screen should be accurately entered based on the previously specified UOM; any required UOM conversions are done at the time of cycle count submission.

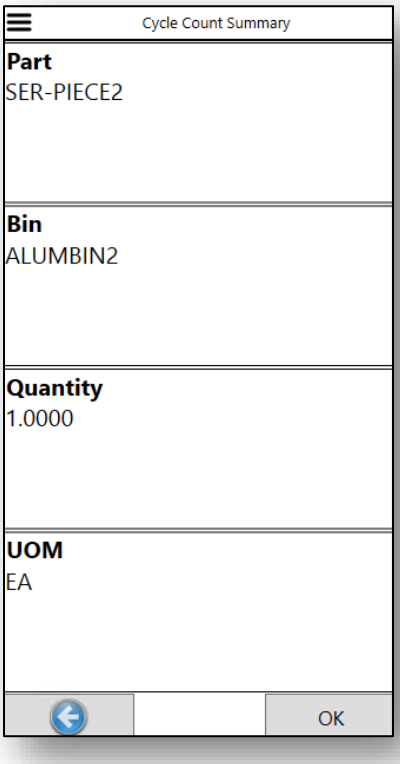


Within the Quantity screen, if a UOM schedule is configured on the part, the user will see the Stock UOM. The UOM used can be changed by selecting the button. The user will then be prompted to select a UOM. All UOMs available for the UOM schedule assigned to the part will be available to select within this screen.




### *Cycle Count Summary*

Once the user selects a quantity, the Cycle Count Summary screen will display with the information chosen by the user. The user can use the back arrows to make any necessary changes. Selecting the OK button will save the cycle count record.



After the parts have been counted and the cycle count has been saved, a user in Core with need to complete the process by posting the entire cycle count. Cycle counts cannot be posted in the mobile application.

After the cycle count is saved, the user will return to the Select Part screen to continue working within the same cycle count. If the user uses the back button, the Cycle Counts screen will appear; if this is done and parts remain on the cycle count without having been counted, a screen will appear indicating the parts that have yet to be counted.

### *Using Inventory Cycle Counts*

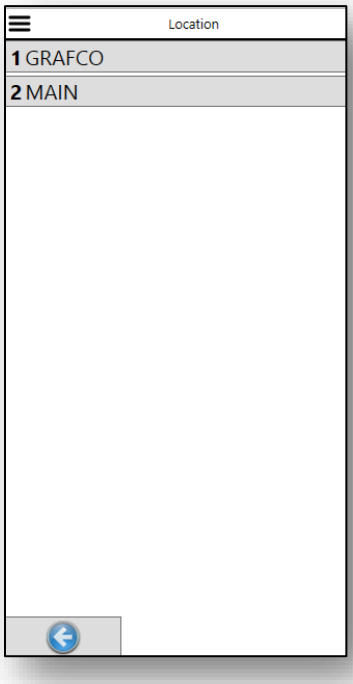
To perform a cycle count, complete the following steps:

1. Select Inventory Cycle Count from the modes screen.
2. If required, select the location.
3. Select the cycle count being performed.
4. Scan the part barcode or search for the part.
5. Select the bin or search to add a new bin.
6. If required, select the lot.
7. If needed, change the UOM.
8. Enter the counted quantity.
9. Approve the cycle count summary.

## Cycle Count by Bin

### *Location*

After the user selects the Cycle Count mode, the location screen will load. This screen allows the user to specify the location in which a cycle count will be completed.

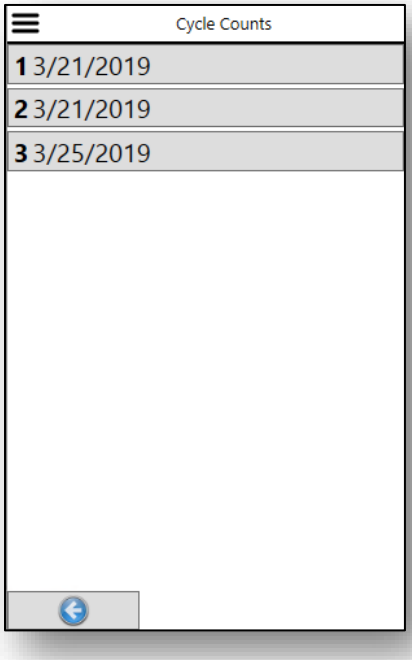



### *Cycle Counts*

The Cycle Count screen displays all open cycle counts that the user is assigned to at the location specified based on the date the cycle count was created. Cycle counts can only be created within Core, but they can be edited using the Mobile Inventory application.

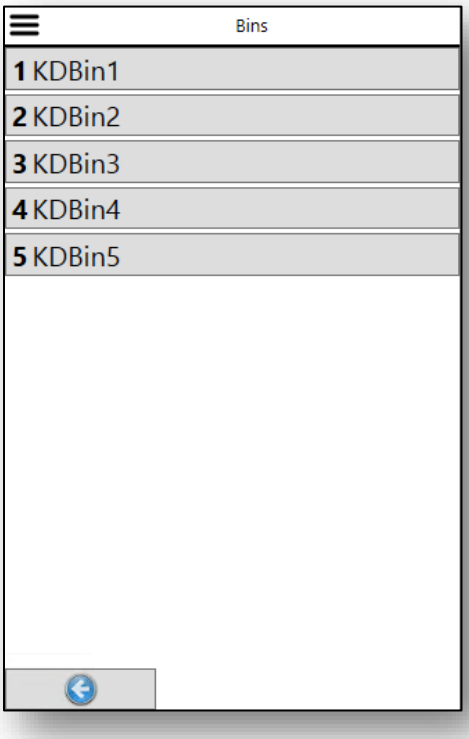
*Note: There is no locking done so any changes made will override previous information in the cycle count for the selected part.*

The user will select a cycle count to begin selecting bins.




### *Bins*

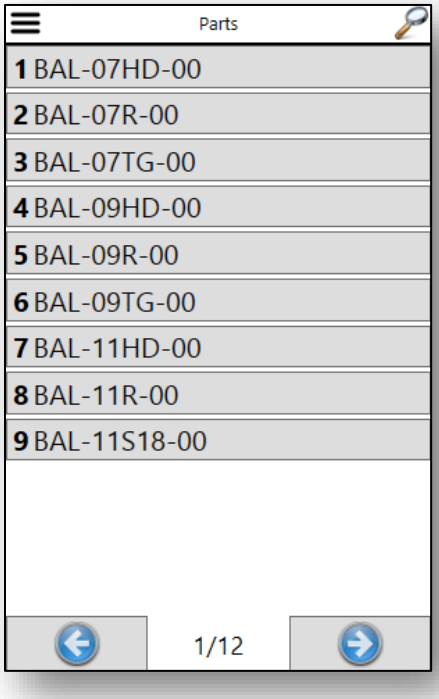
After selecting the cycle count, the bin selection screen will load. This is the bin that is being counted. The user can either scan a bin barcode, 'BINDESCRIPTION', or select the bin using the available bin list.



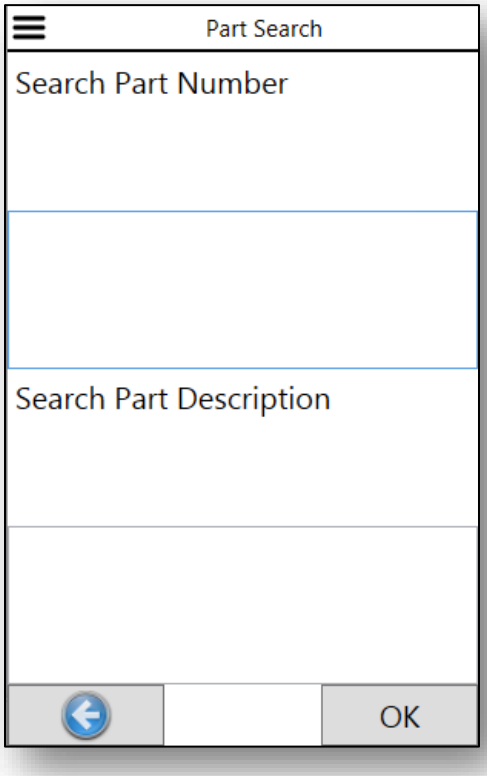

### *Part Select*

After the user selects a bin to count, the part screen will load. Here the user will either scan a part barcode, 'PARTNUMBER[SUFFIX]' or 'PARTNUMBER', or select a part from the list of parts in the bin.

*Note: If using just part number for the barcode, the system automatically assumes the part suffix is [0000].*

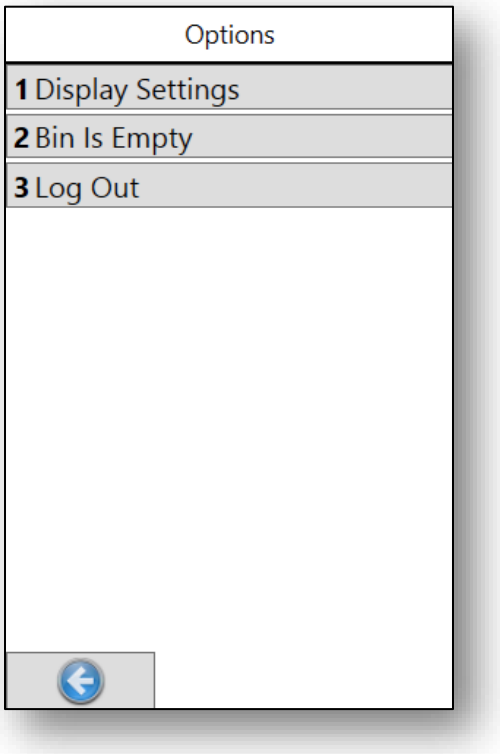



The user may also use the magnifying glass to search for and add parts to the bin. In the search screen, the user may scan a part barcode, or type in the part number or description and select OK. A list of available parts will open for the user to select the part to be added to the bin. Selecting the part will take the user to the quantity to screen to enter the quantity of the part to be added to the bin.




If the bin is completely empty, the user may skip having to select each part and mark a zero quantity. Instead, the user may select the menu button from the top left corner, and select “Bin is Empty”. This will mark all parts in that bin as having a quantity of zero for that bin.

*Note: Any quantities previously entered for individual parts will be overridden when selecting Bin is Empty.*

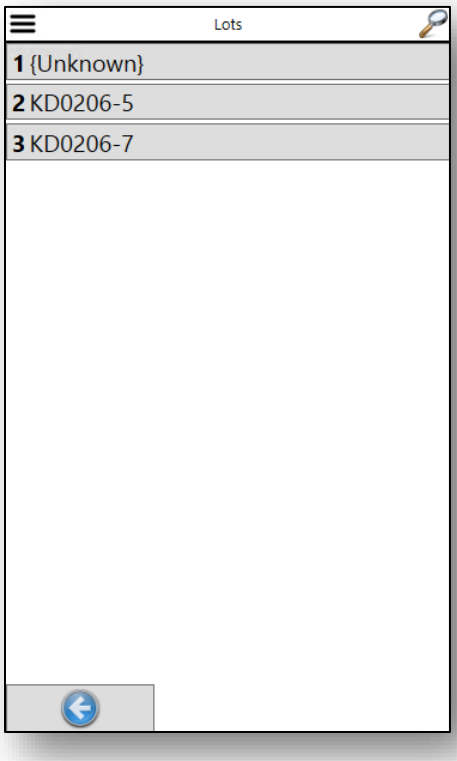



### *Lots*

If the selected part is configured for lot tracking, the user will then be prompted to select a lot number. All available lot numbers for the configured part, bin, and location will display to be selected. The user can either scan a lot barcode, ‘LOTDESCRIPTION’, or select the lot using the available lot list. New lot numbers can also be associated with the part by clicking the magnifying glass in the top right corner to show the list of lots that are associated with the part but not yet for the bin selected. This lot number will then be associated with the bin.

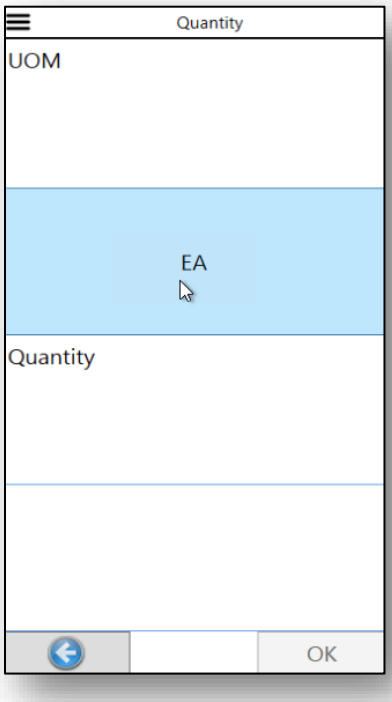
If the part selected is not configured for lot tracking, this screen will be skipped.

If the user scans the barcode of a lot that is not listed at the specified location, the lot number will be added.

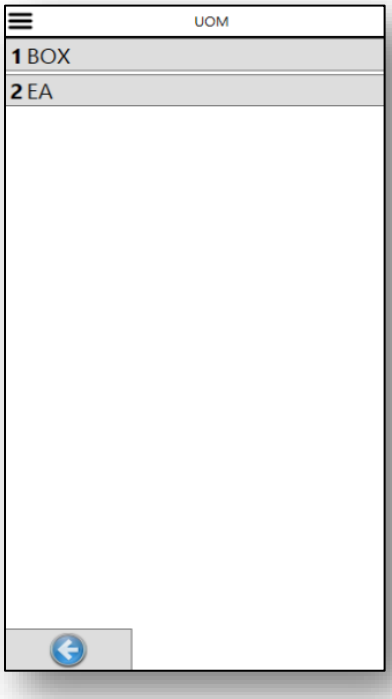



### *Quantity & UOM*

The Quantity screen allows the user to specify the amount of inventory counted and in which unit of measure. This screen only supports positive numbers and represents the number of parts that were counted in the selected location and bin. The value in this screen should be accurately entered based on the previously specified UOM; any required UOM conversions are done at the time of cycle count submission.

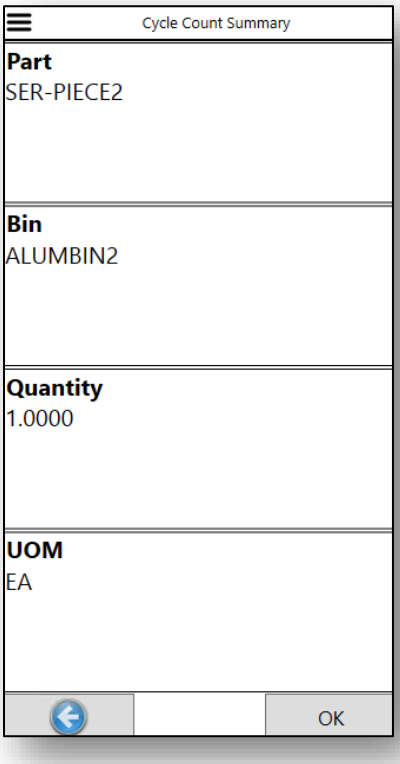


Within the Quantity screen, if a UOM schedule is configured on the part, the user will see the Stock UOM. The UOM used can be changed by selecting the button. The user will then be prompted to select a UOM. All UOMs available for the UOM schedule assigned to the part will be available to select within this screen.



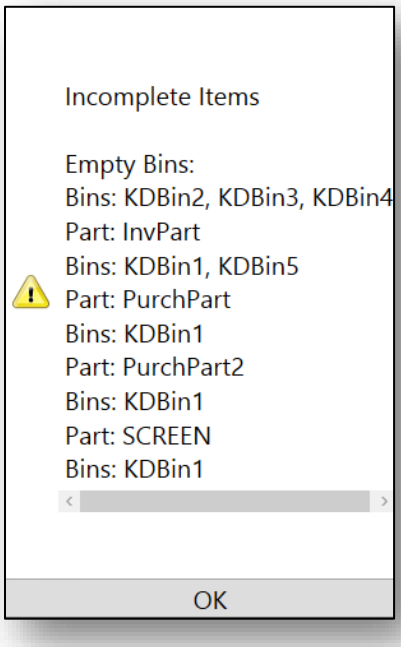

### *Cycle Count Summary*

Once the user selects a quantity, the Cycle Count Summary screen will display with the information chosen by the user. The user can use the back arrows to make any necessary changes. Selecting the OK button will save the cycle count record.



After the parts have been counted and the cycle count has been saved, a user in Core will need to complete the process by posting the entire cycle count. Cycle counts cannot be posted in the mobile application.

After the cycle count is saved, the user will return to the Select Part screen to continue working within the same cycle count. If the user uses the back button, the Cycle Counts screen will appear; if this is done and parts remain on the cycle count without having been counted, a screen will appear indicating the parts that have yet to be counted. Selecting OK to this screen assumes the user is not counting these items at this time.




### *Using Inventory Cycle Counts*

To perform a cycle count, complete the following steps:

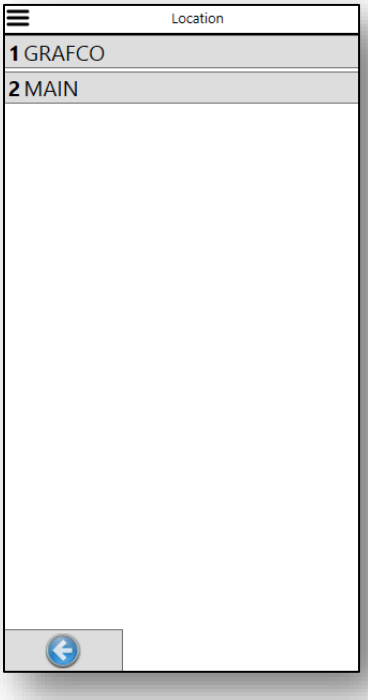
1. Select Inventory Cycle Count from the modes screen.
2. If required, select the location.
3. Select the cycle count being performed.
4. Select the bin
5. Scan the part barcode or search for the part.
6. If required, select the lot.
7. If needed, change the UOM.
8. Enter the counted quantity.
9. Approve the cycle count summary.

## Inventory Inquiry

The Inventory Inquiry screen is a read-only view of the inventory counts, per bin, for a select part. This mode will display the bin, quantity, and received date for the scanned part.

### Location

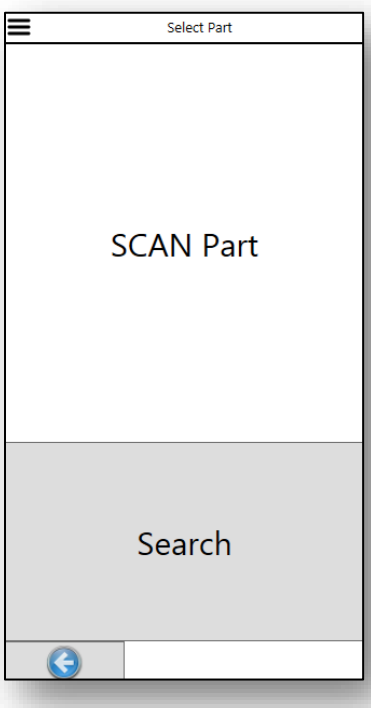
After the user selects the Inventory Inquiry mode, the location screen will load. This screen allows the user to specify the location in which the inquiry will occur.

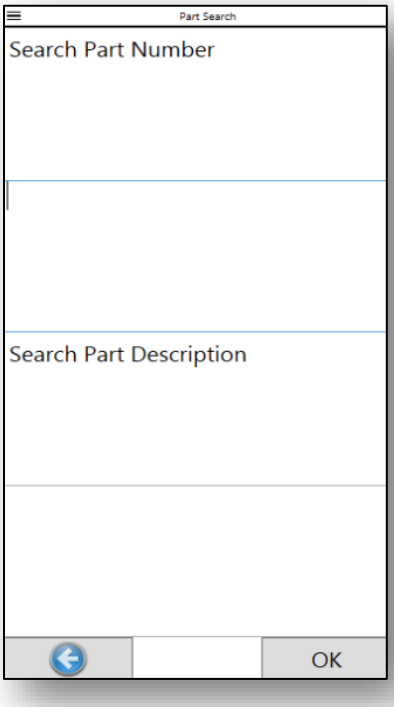



## Part Select

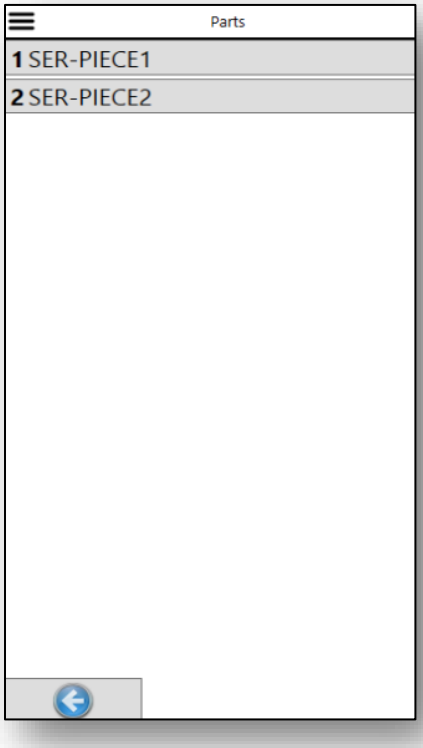
After the location is selected, the part select screen will load. Here the user will either scan a part barcode, 'PARTNUMBER[SUFFIX]' or 'PARTNUMBER', or search for a part by typing the part number and/or part description. The part screen will be limited to the parts that are configured at the location that the user has specified in the location screen.

*Note: If using just part number for the barcode, the system automatically assumes the part suffix is [0000].*




If the user uses the search feature, an additional screen will show for the user to select the correct part from a list of parts matching the search criteria.



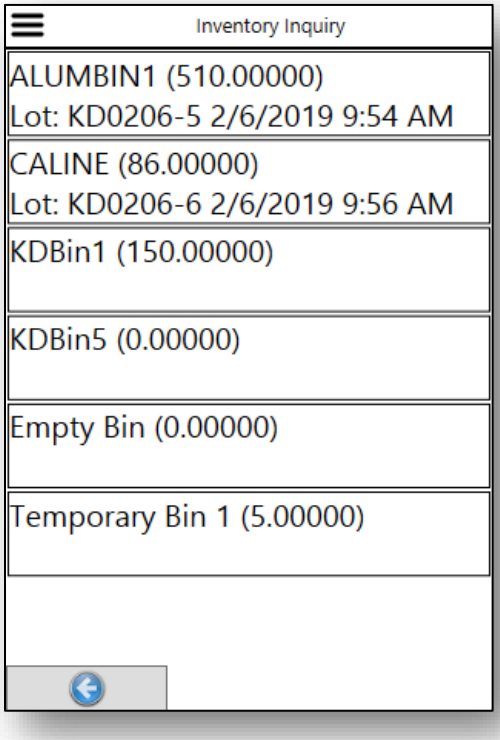

## Inventory Inquiry

After the part is selected, the inquiry screen will load. This screen shows the user information regarding the part selected at the location specified. The following information will display:

- **Bin –** Inventory bin that contains the selected part at the specified location.
- **Quantity –** Quantity of parts within the bin.
- **Lot –** The oldest received lot within the bin. If the select part is not configured for lot tracking or if no lot has been added to the bin, the lot will be blank.
- **Received Date –** The oldest received date and time for any lot associated with the bin. If the selected part is not configured for lot tracking, the Received Date will be blank.

The bins will be sequenced from the oldest received date to the most recent received date.

The user can then use the back arrow to display the Part Select screen to inquiry a new part.

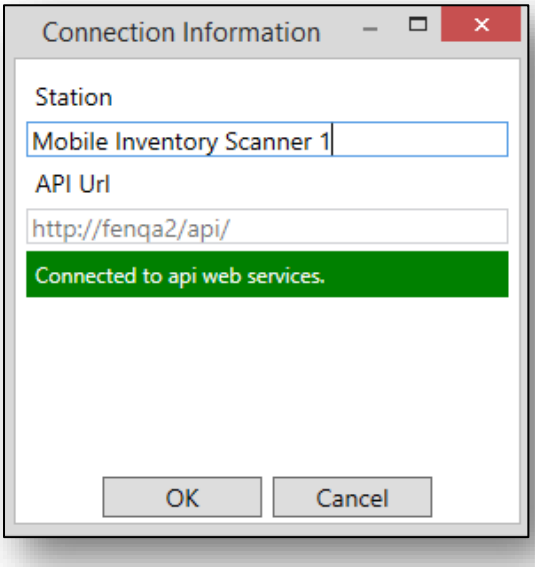



## Exiting

Once a user is finished scanning units, close the application by selecting the red 'X' in the top right corner or navigate to the option screen via the  icon where the 'Log Out' option exists.

# Setup

Setup for this application is done by holding shift while opening the application. This will open the connect Information window. In this screen, identify the station and the API URL. The API URL will be http://YourServerName/API.




## System Requirements

In order to successfully run FeneVision Mobile Inventory, the user must use a Microsoft Windows CE barcode scanner with a small screen and network access. A terminal server must be utilized when running the application. The scanner will run the mobile inventory application through remote access to the terminal server.

*Note: Reference FeneVision Hardware and Software Requirements documentation for the latest hardware minimum requirements.*

## Installation

FeneVision Mobile Inventory should be installed on a terminal server with remote access. FeneVision Mobile Inventory is a separate application that will be installed during the FeneVision installation process. Once the application is installed on the terminal server, a remote access application should be installed on the scanner to access the application on the server.

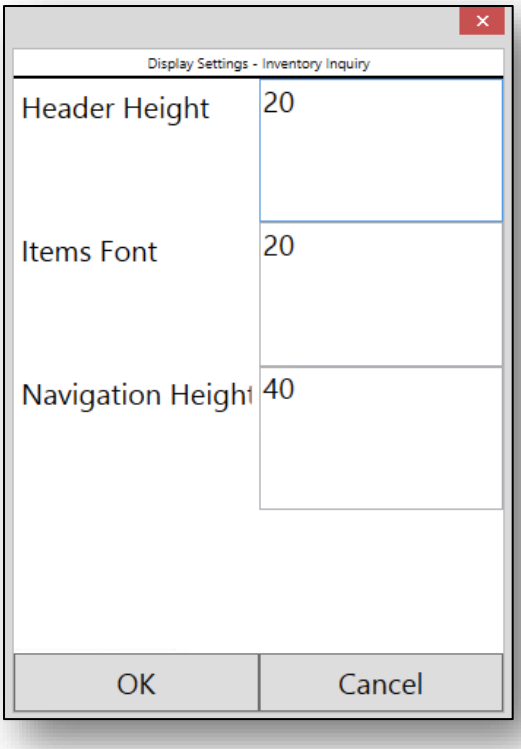
## Display Settings

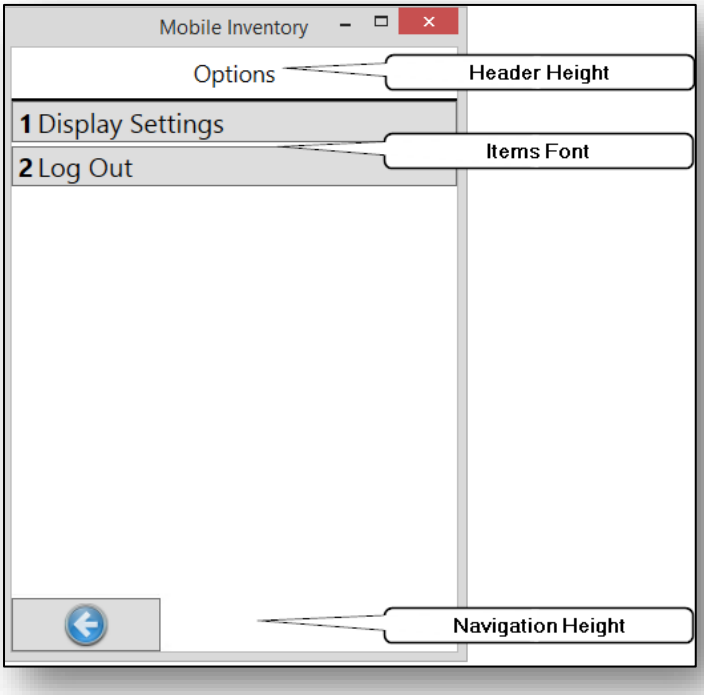
'Display Settings' is used to change the way text is displayed in the various screens. Each screen in Mobile Inventory can be customized.

To access the Display Setting, select the  icon in the top left corner of Mobile Inventory, and select option 1. This will open the display setting for the specific screen the user is currently using.

The following 'Display Settings' can be configured for each screen in Mobile Inventory.

- **Header Height –** Numeric value that determines the size of the header.
- **Items Font –** Numeric value that determines the size of the text displayed on the screen.
- **Navigation Height –** Numeric value that determines the size of the arrow buttons in the menu.






## Help

Users can access the most up-to-date user manuals from the FeneVision Core, Tracking, or Trucking applications. See the FeneVision Core user manual for additional steps to access the full user manual directory.