RAMCO AVIATION SOLUTION

VERSION 5.8

# USER GUIDE

# INVENTORY OPERATIONS HUB

ramco

# ABOUT THIS MANUAL

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

## WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco AviationSolution. This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based software.

## HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

## HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 4 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the entire **Inventory Operations** business process. The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the **Inventory Operations Hub** sub process.

The **Index** offers a quick reference to selected words used in the manual.

## DOCUMENT CONVENTIONS

- The data entry has been explained taking into account the “Create” business activity. Specific references (if any) to any other business activity such as “Modify” and “View” are given as “Note” at the appropriate places.
- **Boldface** is used to denote commands and user interface labels.

  Example: Enter **Company Code** and click the **Get Details** pushbutton.
- Italics used for references.

  Example: *See Figure 1.1.*
- The icon is used for Notes, to convey additional information.

## REFERENCE DOCUMENTATION

This User Guide is part of the documentation set that comes with Ramco Aviation Solution.

The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems’ Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

## WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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# INTRODUCTION

The **Inventory Operations Hub** provides a dashboard to manage Inventory Operations, which would enlist the activities pending for action, in the Inventory stand point, (i.e.) Requests, Issues, Returns, Receipts, etc. that needs to be processed and in the Maintenance Stand point, (i.e.) Alerts on parts that are due for Maintenance, Shelf Life Expiry and Tool Calibration.

Provision of wide variety of Inventory Transactions like Material Requests, Issues, Returns, Receipts and Transfers into a single, dashboard view, eliminates the need to visit different processes, activities and screens, simplifying navigation. The hub also displays only necessary information based on the context. The seamless integration of the hub can greatly simplify internal processes, enabling user to focus on core business.

# INVENTORY OPERATIONS HUB

The **Inventory Operations Hub** sub process provides a dashboard to manage Inventory Operations, which would enlist the activities pending for action, in the Inventory stand point, (i.e.) Requests, Issues, Receipts, etc. that needs to be processed and in the Maintenance Stand point, (i.e.) Alerts on parts that are due for Maintenance, Shelf Life Expiry and Tool Calibration.

## 2.1 MANAGING SCREEN DEFAULTS & PREFERENCES

This activity allows the user to identify the parameters which govern the data displayed in the **Inventory Operations Hub**. User can set the Preference for a given User - Role - User Interface combination.

1. Select the icon ‘’ **in the Inventory Operations Hub** screen. **The Manage Screen Defaults & Preferences** page appears. *See Figure 2.1.*

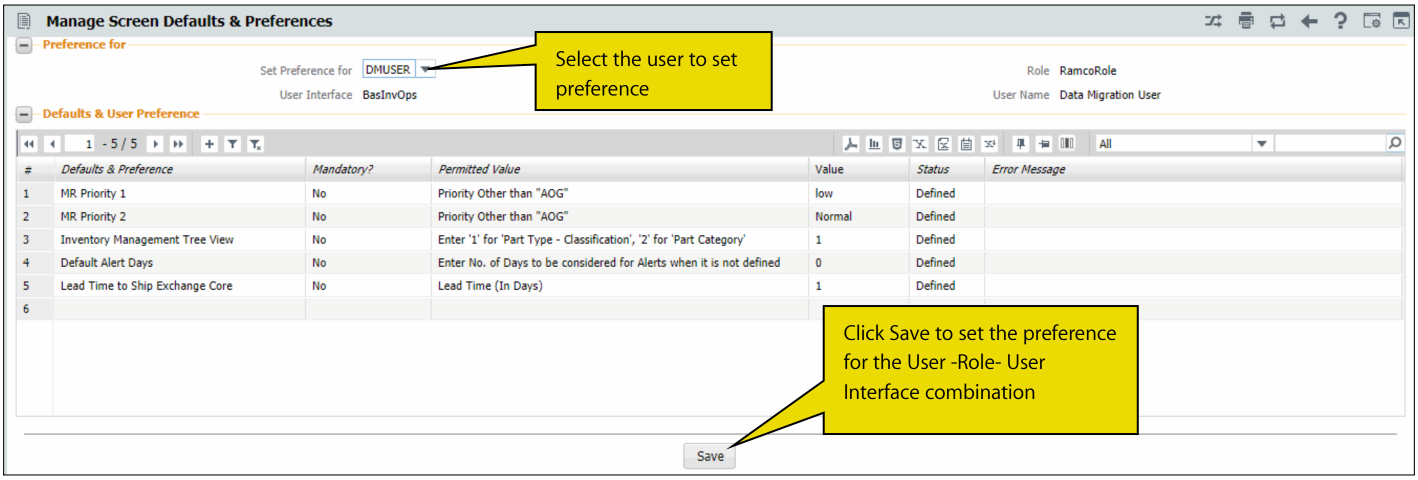


**Figure 2.1 Managing screen defaults & preferences**

2. In the **Set preference for** drop-down list box, select the user to set the Preference for a given User - Role - User Interface combination.
3. The system displays the list of parameters and corresponding **Permitted Values** in the **Defaults & User Preference** multiline.
4. Specify the **Value** and click **Save** to set the preference for the Inventory Operations Hub.

## 2.2 WORKING WITH INVENTORY OPERATIONS HUB

The **Inventory Operations Hub** provides a dashboard to manage Inventory Operations, which would enlist the activities pending for action, in the Inventory stand point, (i.e.) Requests, Issues, Receipts, etc. that needs to be processed and in the Maintenance Stand point, (i.e.) Alerts on parts that are due for Maintenance, Shelf Life Expiry and Tool Calibration.

1. Select the **Inventory Operations Hub** under the **Inventory Operations** business component in **Stock Management** business process. The **Inventory Operations Hub** page appears. *See Figure 2.2.*

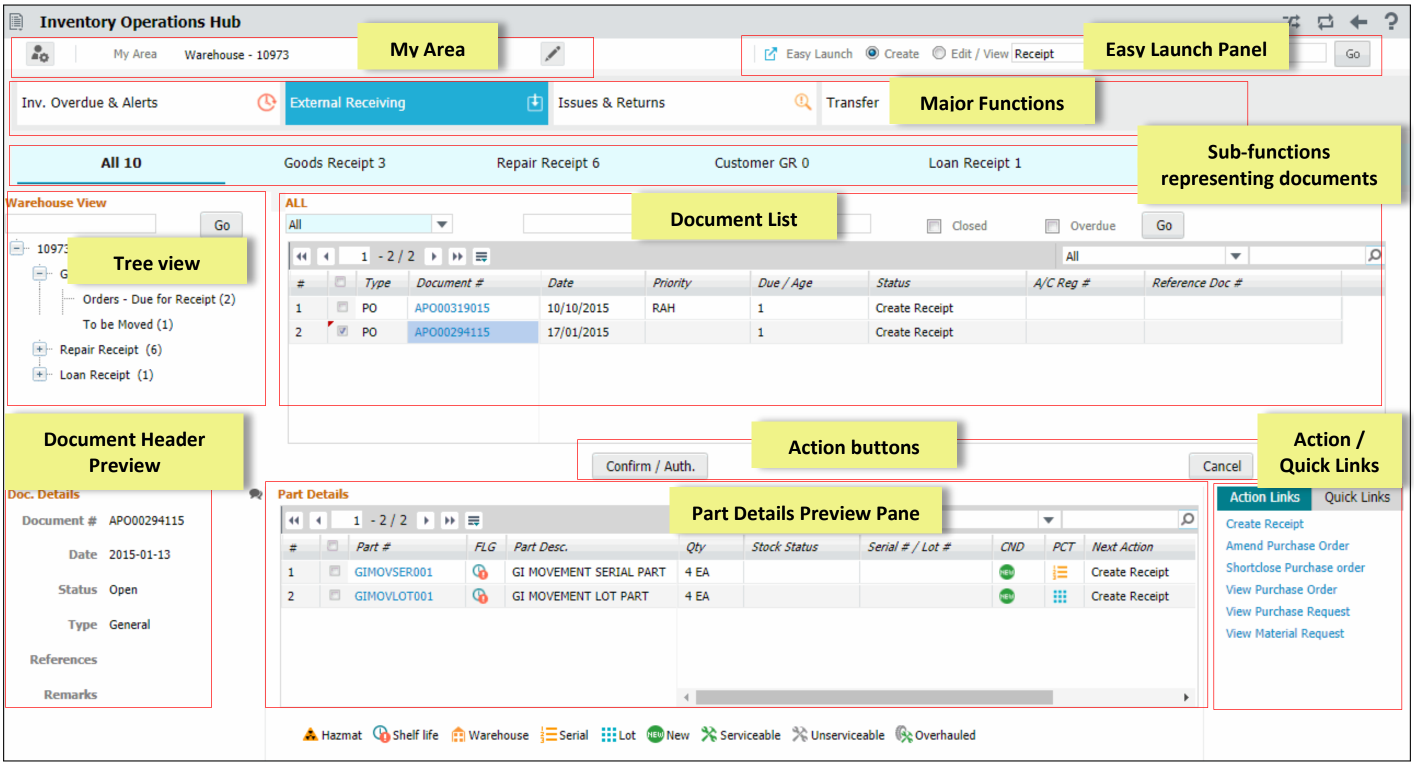


**Figure 2.2 Inventory Operations Hub**

The Inventory Operations Hub has the following panels:

### 1. My Area & Easy Launch Panel

### 2. Functions – Inv. Overdue & Alerts, External Receiving, Issues & Returns, Transfer

- Sub-functions
- Tree Panel
- Document/Part List Panel
- Document Preview Panel
- Action Links and Quick Links Panel

## 2.2.1 DEFINING / MODIFYING MY AREA

This section displays the Area of operation for the login user. User is allowed to set one or more warehouses as the preferred context. The Area could be defined / modified by using the Edit icon provided. The documents shall be retrieved in the Hub for processing based upon the defined Area.

1. The **My Area** section is available at the top of the Inventory Operations Hub. *See Figure 2.3*.

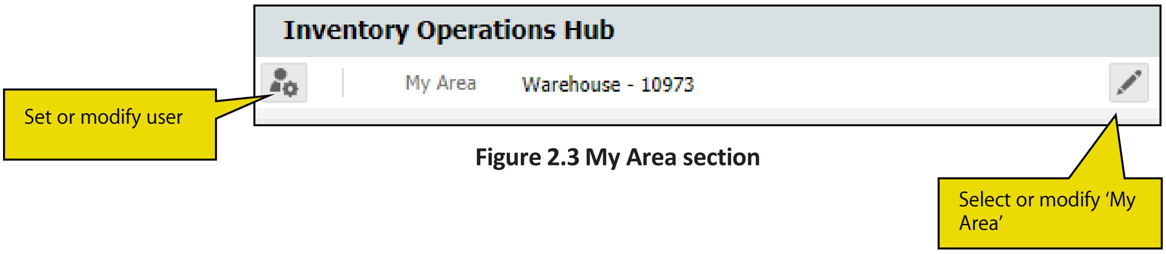


**Figure 2.3 My Area section**

2. Click the "Edit Icon" '' to select values for My Area.
3. The different types of Areas that could be identified are as follows: Area, Storage Location, Warehouse and Work Center. See Figure 2.4.

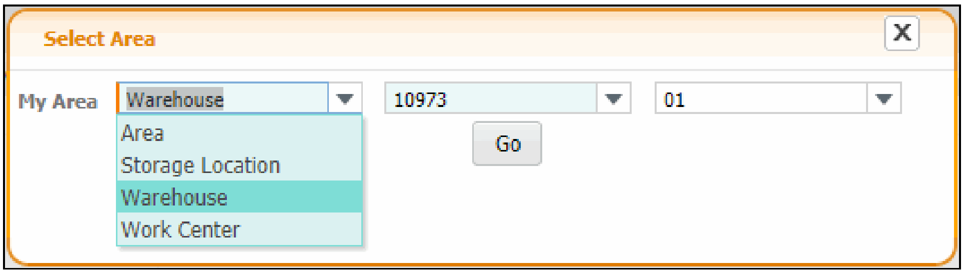


**Figure 2.4 Pop-up screen to define My Area**

4. Click **Go** button to set or modify My Area.

## 2.2.2 EASY LAUNCH PANEL

This section facilitates launch of various application screens for creation or modification of receipt.

1. Select the **Create** radio button in the **Easy Launch** section *See Figure 2.5.*

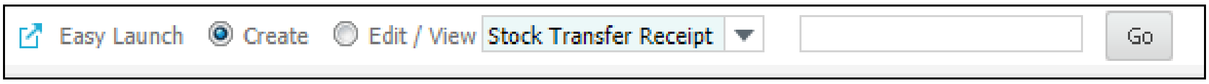


**Figure 2.5 Easy Launch section**

2. Enter a Purchase Order, Repair Order or a Customer Order and click the **Go** button to create respective receipts.
3. Select the radio button 'Edit / View' and select either Goods Receipt (Regular Purchase or Repair Receipt or Customer Goods Receipt) or Stock Transfer Receipt.
4. Click the **Go** button to modify or view the respective receipt.

*Note: If the drop-down field is selected as "Goods Receipt", 'Manage Goods Receipt' screen will be launched. If it is selected as "Stock Transfer Receipt", then the "Manage Stock Transfer Receipt" screen will be launched.*

## 2.2.3 HOW TO MANAGE INVENTORY OVER-DUE AND ALERTS

The **Inv. Overdue & Alerts** function alerts the user with the visibility of the inventoried parts that would be due for Maintenance or Shelf Life Expiry or Tools Calibration.

1. Select the **Inv. Overdue & Alerts** Function in the **Inventory Operations Hub**. *See Figure 2.6.*

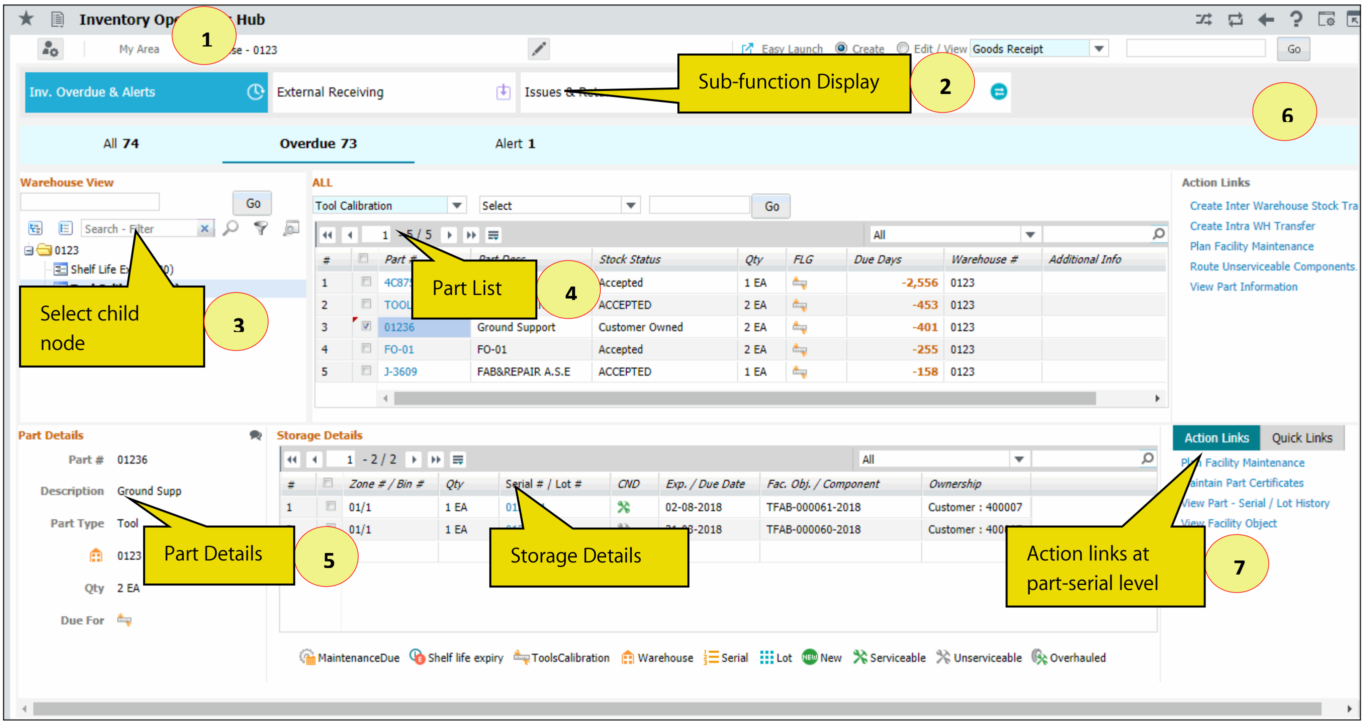


**Figure 2.6 Managing inventory over-due and alerts**

2. Inv. Overdue & Alerts function breaks down into sub functions along with the count of each sub-function.
   - Overdue
   - Alerts
3. The tree section displays the break-down for the count displayed in the Overdue or Alerts button. Click the respective child node among the following child nodes displayed under the Overdue and Alerts buttons:
   - Shelf Life Expiry
   - Tool Calibration
   - Maintenance Due
4. The 'Part List Panel' displays the Part-Stock Status combination that is due for maintenance. Click the Part # in the multiline of the Part List Panel.
5. The system displays the following sub-sections:
   - **Part Details**: The details of the selected Part # are displayed in this section.
   - **Storage details**: This section displays the Part-Serial / Lot # combination that forms the count displayed against the Part – Stock Status combination in the multiline of the Part List Panel.
   - Detailed level **Action Links / Quick Links**: Links to the application screens for the list of identified actions possible for the Part-Serial # combination.
6. You can select the desired action using the **Action Links** that are links to the application screens for the list of identified actions possible for the Part-Stock Status combination.
7. Using the Detailed level **Action links**, you can update the component condition, record part-serial change, maintain part certificates, view part-serial / lot history for the Part-Serial / Lot # combination.

### 2.2.4 HOW TO MANAGE EXTERNAL RECEIPTS

One of the primary activities in the management of Warehouse is the management of Receipts from External Agents (i.e.) Suppliers and Customers. In order to achieve the effective management of the External Receipts (i.e.) Regular Purchases, Repair Receipts, Customer Goods Receipts and Loan / Rental Receipts, it is required that they need to be summarized in the Hub, based upon the Receipt Type and the action that is pending on the respective document.

The **External Receiving** function enlists the different External Receipts that needs to be acted upon (i.e.) Goods Receipts or Repair Receipts or Customer GR or Loan Receipt or Rental Receipts under each Warehouse.

## Receiving parts using action links

1. Select the **External Receiving** Function in the **Inventory Operations Hub**. *See Figure 2.7.*

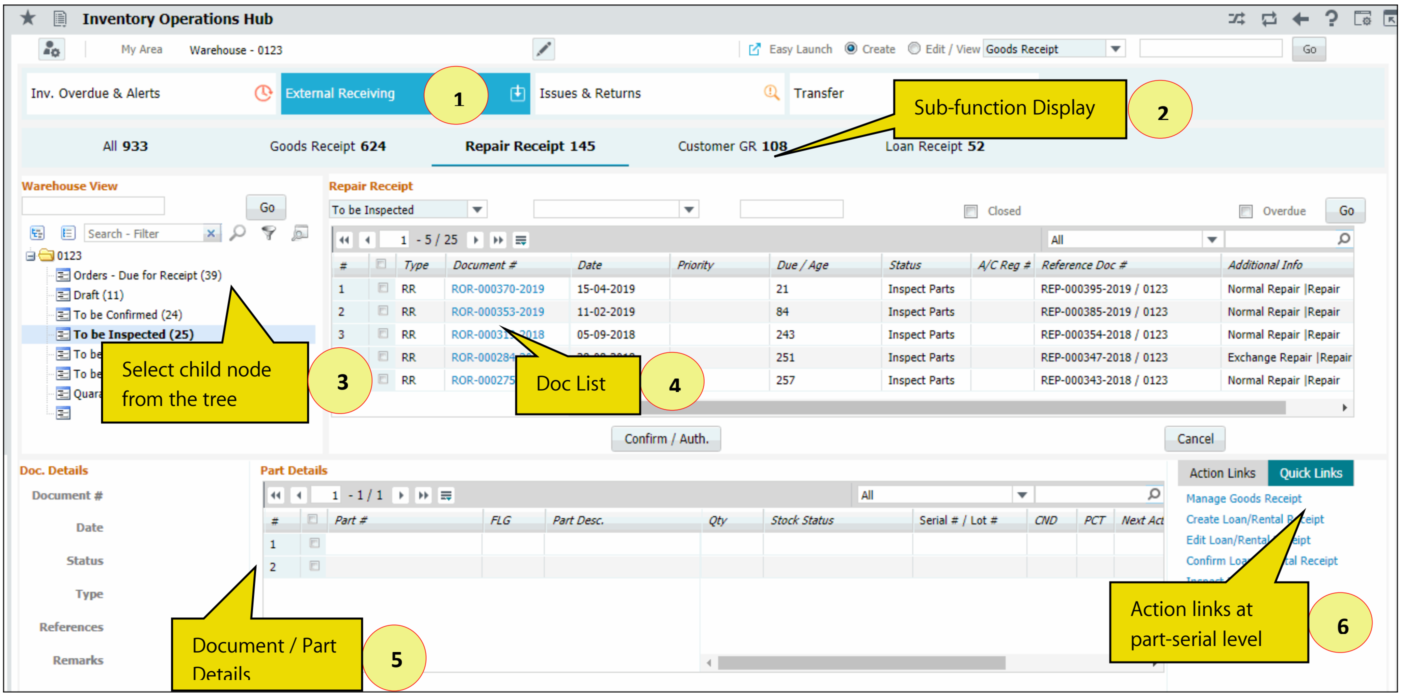


**Figure 2.7 Managing external receipts**

2. The **External Receiving** function breaks-down into sub functions along with the count of each sub-function.
   - Goods Receipt
   - Repair Receipt
   - Customer Goods Receipt
   - Loan Receipt
   - Rental Receipt
3. The tree panel displays the warehouse with the break-down for the count displayed for the respective documents. The possible child nodes under each of the parent nodes (Goods Receipt or Repair Receipt or Customer GR or Loan Receipt or Rental Receipt) are given below:
   - **Goods Receipt or Customer GR or Repair Receipt**
     - *<u>Orders - Due for Receipt:</u> Count of POs / ROs / POs of type 'Customer Goods' (as applicable)* which has at least one Part that is due for receipt in a given Warehouse, though the entire quantity should have been received prior to the current system date.
     - <u>Open Order – Not Due</u>: Count of POs / ROs / POs of type 'Customer Goods' (as applicable) which has

at least one Part that is due for receipt in a given Warehouse, with the due date well above the current system date.

- *Draft:* Count of Receipts of the selected Receipt Type, in the given Receiving Warehouse, with the Next Action as 'Record Serial / Lot Detail' for at least one Part.
- *To be Confirmed:* Count of Receipts of the selected Receipt Type, in the given Receiving Warehouse, with the Next Action as 'Confirm Receipt' for at least one Part
- *To be Inspected:* Count of Receipts of the selected Receipt Type, in the given Receiving Warehouse, with the Next Action as 'Inspect Part' or 'Confirm Inspection', for at least one Part.
- *To be Moved:* Count of Receipts of the selected Receipt Type, in the given Receiving Warehouse, with the Next Action as 'Move Part', for at least one Part.
- *To be Binned:* Count of Receipts of the selected Receipt Type, in the given Receiving Warehouse, with the Next Action as 'Move Part', for at least one Part.
- *Quarantined:* Count of Receipts of the selected Receipt Type, in the given Receiving Warehouse, with the Next Action as 'Resolve Quarantine', for at least one Part.

- **Loan Receipt or Rental Receipt**
  - *Orders - Due for Receipt:* Count of Loan Orders in the given Warehouse # for which the Required Date is less than the current system date; Count of Rental Orders (against which Rental Issue is confirmed, but Rental Receipt is not recorded), with the Due Days for Return lesser than zero.
  - *Open Order - Not Due:* Count of Loan Orders in the given Warehouse # for which the Required Date in the Loan Order is well above the current system date; Count of Rental Orders (against which Rental Issue is confirmed, but Rental Receipt is not recorded), with the Due Days for return greater than zero
  - *To be Confirmed:* Count of Loan Receipts in Received status against which Inspection recording is not due or mandatory
  - *To be Inspected:* Count of Loan Receipts in Received status, which requires the Inspection recording is mandatory and is due.
  - *Quarantined:* Count of Loan Receipts in Received status where Quarantined Qty is not null.

4. On clicking the child node 'Orders-Due for Receipt', the Document List Panel displays the documents that are due for receipt. This section also provides the user an alternative way of traversal in the Hub, 'Direct Search'. By this 'Direct Search', the user need not take the tree section route to view the Document List Panel. Instead, directly, the drop-downs available over the multiline can be used to select desired Search Criteria to view the Document List.
5. Click the Document # in the multiline of the Document List Panel. The system displays the following sub-sections:
   - Doc. Details: Document lelve details of the selected document.
   - Part Details: Part level details of the selected document.
   - Detailed level Action Links / Quick Links: Next possible action links for a given document based upon the Next Action displayed in the Next Action column of the Document Preview Panel.
6. In the Detailed level **Action links**, select the **Create Receipt** link which launches the **Manage Goods Receipt** page where you can create the Goods Receipt.

# Confirming / canceling receipts using action button

1. Select a record in the multiline of the 'Document List Panel' in the **External Receiving** function. *See Figure 2.8.*

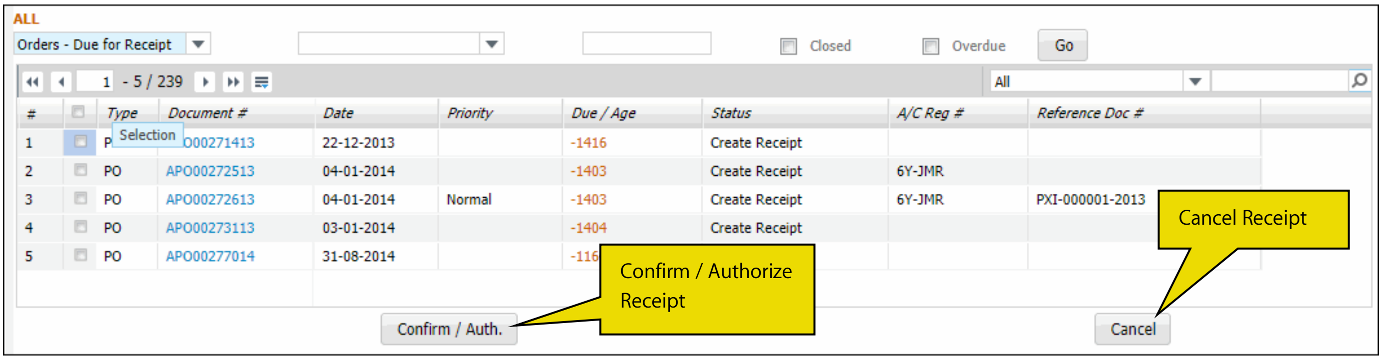


**Figure 2.8 Confirming / canceling receipts**

2. Click the **Confirm / Auth.** pushbutton below the multiline to confirm / authorize the receipt.
3. Click the **Cancel** pushbutton to cancel the receipt.

## 2.2.5 HOW TO MANAGE ISSUES AND RETURNS

The hub provides the ability to process Requests, Issues, Returns, etc. that are made in the Warehouse. The visibility of the count of the Requests, Issues or Returns can be provided at two levels.

- Aircraft Level
- Warehouse Level

A function titled **'Issues & Returns'** has been provided in the **Inventory Operations Hub**, to provide a view on all the pending transactions (i.e.) Requests or Issues or Returns under each Aircraft or Warehouse.

1. Select the **Issues & Returns** Function in the **Inventory Operations Hub**. *See Figure 2.9.*

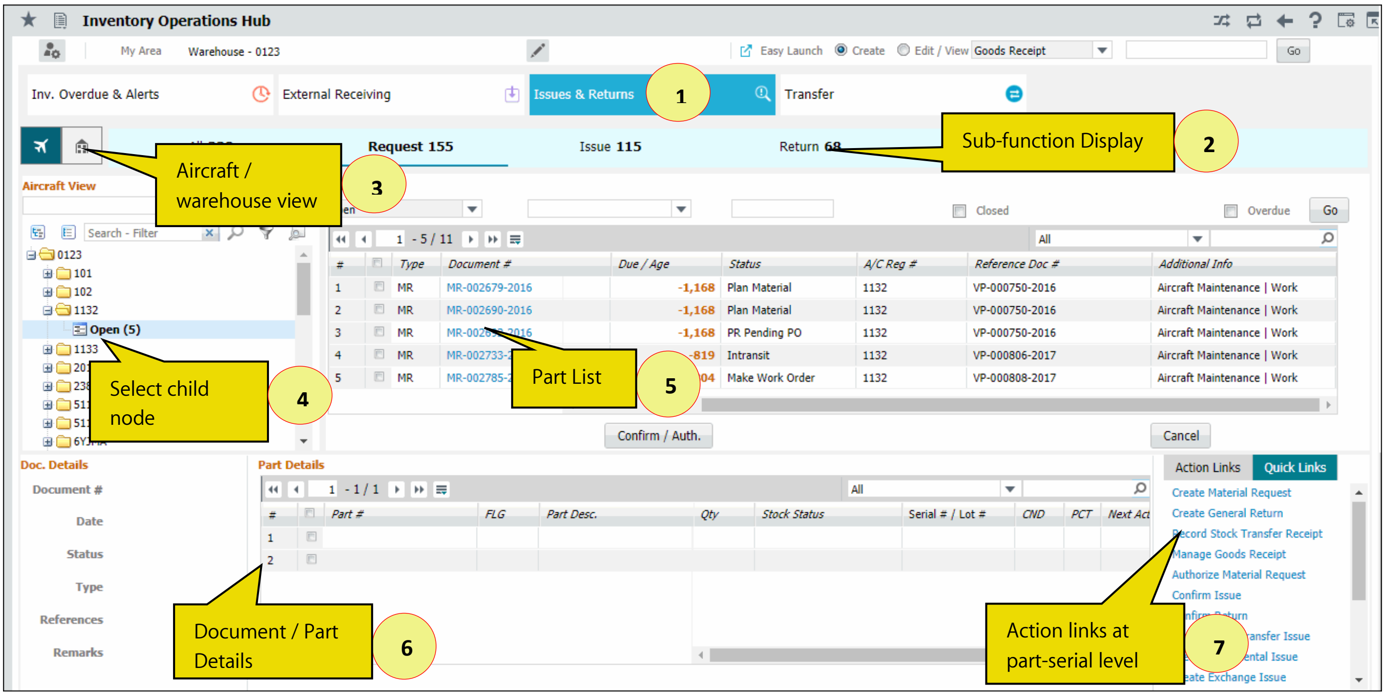


**Figure 2.9 Managing Issues & Returns**

2. The **Issues & Returns** function provides the following sub functions along with the count of each sub-function.
   - Request
   - Issue

- Return

3. The Tree Panel is populated primarily based on the level at which the documents are required to be viewed (i.e.) **Aircraft View** or **Warehouse View**. The primary difference between these two views is that the Aircraft View will display only those Requests, Issues and Returns made with reference to a given Aircraft, thereby eliminating the Loan Issues, Rental Issues, Exchange Issues, etc.
4. The possible child nodes under each of the parent nodes (Request, Issue or Return) are given below for Aircraft / Warehouse View. You can select one of the child nodes:
   - Request
     - *Inprogress:* Count of the Material Requests for a given Aircraft Reg # / Warehouse # that are in Draft status.
     - *Pending Authorization:* Count of the Material Requests for a given Aircraft Reg. # / Warehouse # that are in Fresh status.
     - *Open:* Count of the Material Requests for a given Aircraft Reg, # / Warehouse # that are in Authorized status and is available in the sourcing cycle.
   - Issue
     - *Orders Pending Issue (Applicable only for Warehouse View):* Due: Count of the Exchange or PBH Purchase Orders or Loan Orders or Rental Orders or Repair Orders or Stock Transfer Orders against which issue of Parts is pending as per the current system date, in a given Warehouse.
     - *Inprogress:* Count of the Stock Issues against a given Aircraft Reg # / Warehouse # that are in Draft status.
     - *To be Confirmed:* Count of the Stock Issues against a given Aircraft Reg. # / Warehouse # that are in Fresh status.
   - Return
     - *Inprogress:* Count of the Stock Returns against a given Aircraft Reg # / Warehouse # that are in Draft status.
     - *To be Confirmed:* Count of the Stock Returns against a given Aircraft Reg. # / Warehouse # that are in Fresh status.
5. The Document List Panel displays the documents contributing to the count of a given child node of tree section. This section also provides the user an alternative way of traversal in the Hub, ‘Direct Search’. By this ‘Direct Search’, the user need not take the tree section route to view the Document List Panel. Instead, directly, the drop-downs available over the multiline can be used to select desired Search Criteria to view the Document List.
   - The Check-Box ‘Closed’, offers the user to fetch even the Closed Material Requests; Confirmed Issues and Confirmed Returns.
   - The Check-Box, ‘Overdue’, offers the user to fetch only those Issues or Requests that are Overdue (i.e.) Due Date is earlier than the current server date. The Overdue Check-box does not impact the Search for Returns.
6. Click the Document # in the multiline of the Document List Panel. The system displays the following sub-sections:
   - Doc. Details: Document lelve details of the selected document.
   - Part Details: Part level details of the selected document.
   - Detailed level Action Links / Quick Links: Next possible action links for a given document based upon the Next Action displayed in the Next Action column of the Document Preview Panel.
7. In the Detailed level **Action links**, you can select the appropriate links to create / edit / confirm issue and return documents.

## 2.2.6 HOW TO MANAGE STOCK TRANSFERS

Warehouse management includes processing the Transfer Issue or Transfer Receipt or Material Loss or Transfer Order or Intra Warehouse Stock transfer etc. that are made in that Warehouse. It is imperative to have a single dashboard to provide a summary of all the pending activities related to transfer of stock so that the Stock Transfer could be managed efficiently.

A function titled **Transfer** has been provided under the Inventory Operations Hub, to display all the pending stock transfer related transactions (i.e.) Transfer Issue or Transfer Receipt or Material Loss or Transfer Order or Intra Warehouse Stock transfer under each Warehouse.

## Transferring materials to other locations / warehouse

1. Select the **Transfer** Function in the **Inventory Operations Hub**. *See Figure 2.10.*

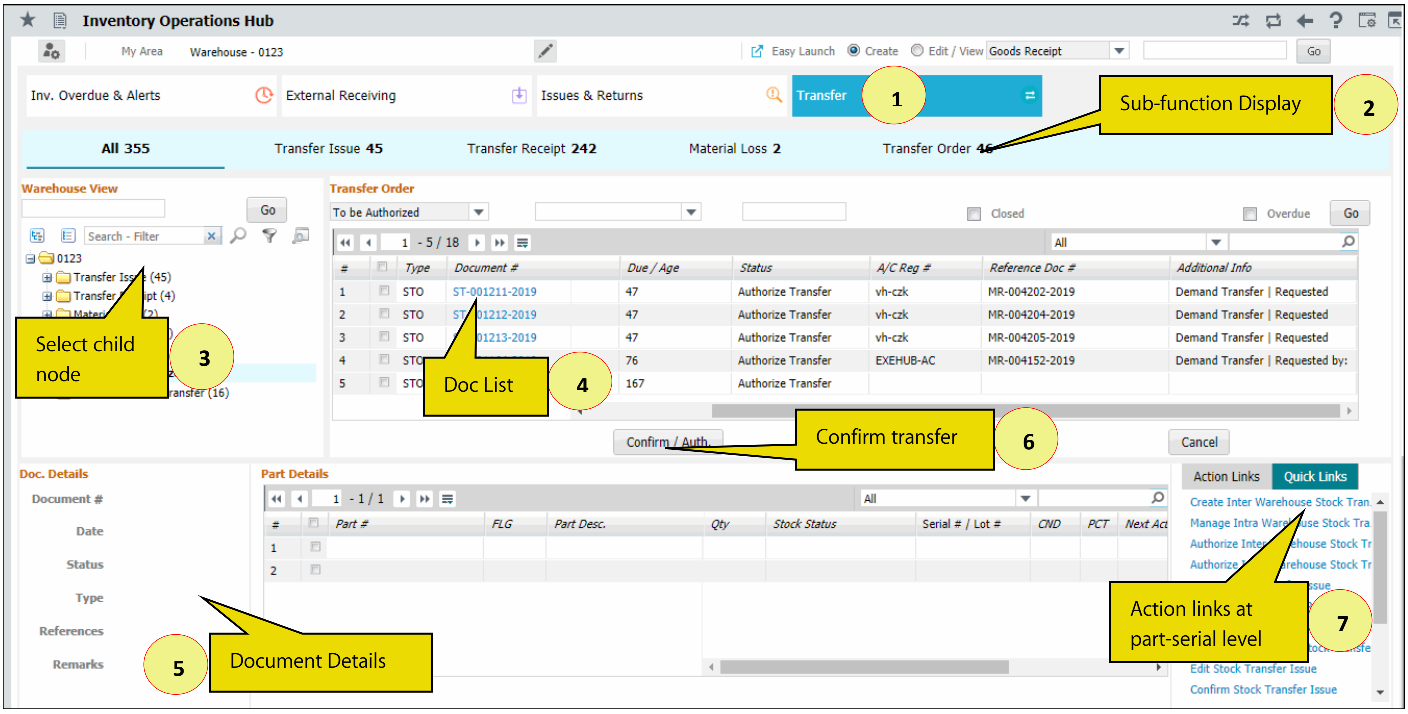


**Figure 2.10 Transferring materials to other locations**

2. The **Transfer** function provides the following sub functions along with the count of each sub-function.
   - Transfer Issue
   - Transfer Receipt
   - Materials Loss
   - Transfer Order
   - Intra Warehouse Transfer
3. The tree panel displays the break-down for the count displayed for the respective documents. The possible child nodes under each of the parent nodes (Transfer Issue or Transfer Receipt or Material Loss or Transfer Order or Intra Warehouse Transfer) are given below:
   - Transfer Issue
     - *Draft:* Count of the Stock Transfer Issues in Draft status, for a given Warehouse.
     - *Fresh:* Count of the Stock Transfer Issues in Fresh status, for a given Warehouse.
     - *Orders - Due for Issue*: Count of the Stock Transfer orders created from a given Warehouse, that are in Authorized status with the Need Date less than or equal to the current system date (with

Stock Transfer Issue not being recorded for at least one part).

- *Open Order – Not Due:* Count of the Stock Transfer orders created from a given Warehouse that is in Authorized status with the Need Date greater than the current system date (with Stock Transfer Issue not being recorded for at least one part).

- Transfer Receipt
  - *To be Confirmed:* Count of the Stock Transfer Receipts that are in Fresh status, in the given Warehouse.
  - *Orders pending for Receipt:* Count of the distinct Stock Transfer Orders (for a given To Warehouse #), against which the Stock Transfer Issue is in Confirmed status, but Stock Transfer Receipt is not recorded.
- Material Loss
  - *To be Confirmed:* Count of the Material Loss documents recorded against a Stock Transfer document for a given Warehouse # that are in Fresh status.
- Transfer Order
  - Draft: Count of the Stock Transfer orders created from a given Warehouse that is in Draft status.
  - *To be Authorized:* Count of the Stock Transfer orders created from a given Warehouse that is in Fresh status.
- Intra Warehouse Transfer
  - *Draft:* Count of Intra Warehouse Stock Transfer Orders created from a given Warehouse that is in Draft status.
  - *To be Authorized:* Count of the Intra Warehouse Stock Transfer orders created from a given Warehouse, that are in Fresh status.

4. Click the child node 'To be Authorized' in the tree panel. The Document List Panel displays the Count of the Stock Transfer orders created from a given Warehouse. Click the Document # in the multiline.
5. . The system displays the following sub-sections:
   - Doc. Details: Document lelve details of the selected document.
   - Part Details: Part level details of the selected document.
6. Click the **Confirm / Auth.** pushbutton to confirm the transfer.
7. Select the appropriate links in the detailed level **Action Links / Quick** for a given document to perform desired action based upon the Next Action displayed in the Next Action column of the **Part Details** multiline.

## Issuing transferred parts

1. Select the ‘Transfer Issue’ sub-function. *See Figure 2.11.*

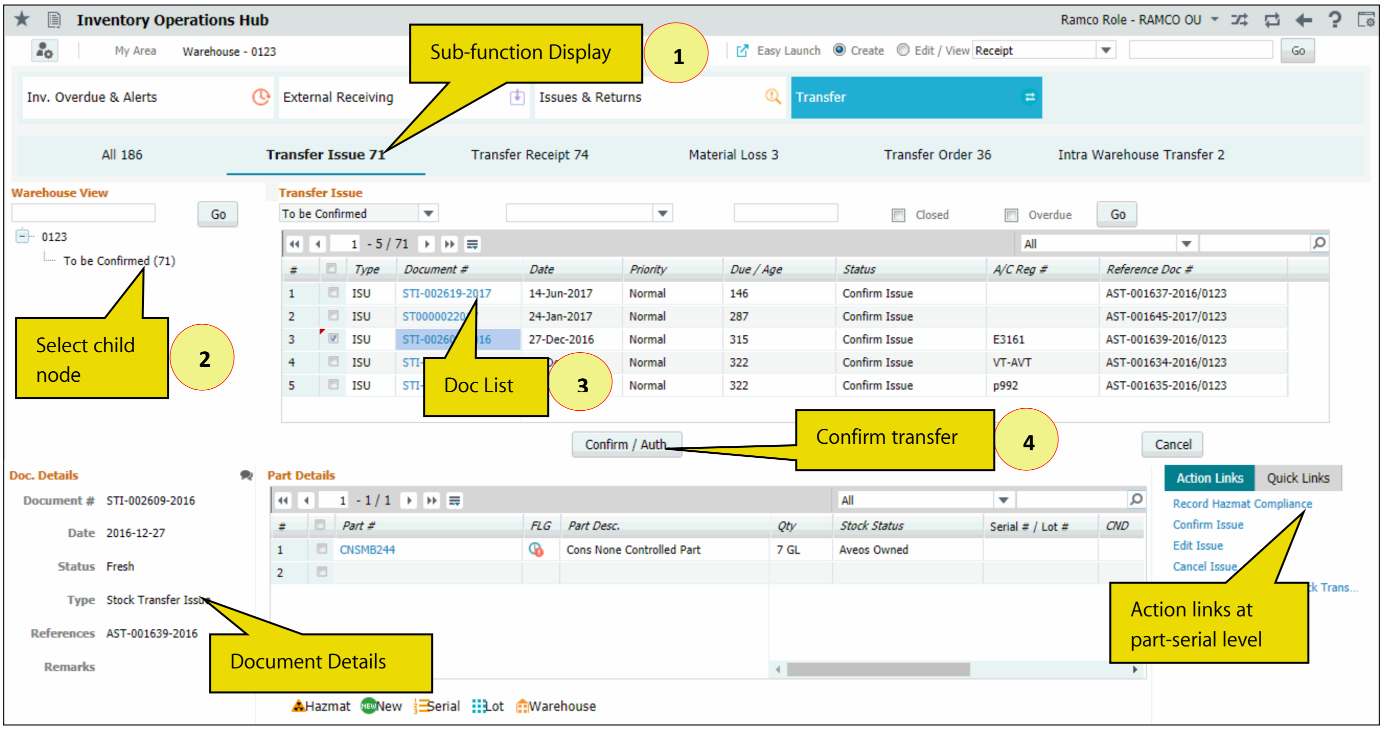


**Figure 2.11 Issuing transferred parts**

2. Click the child node in the tree panel for the sub-function selected. The Document List Panel displays the Count of the Stock Transfer issues created from a given Warehouse.
3. Click the Document # in the multiline of the Document List Panel. The system displays the following sub-sections:
   - Doc. Details: Document level details of the selected document.
   - Part Details: Part level details of the selected document.
   - Detailed level **Action Links / Quick Links**: Next possible action links for a given document based upon the Next Action displayed in the Next Action column of the Document Preview Panel.
4. Click the **Confirm / Athu.** pushbutton below the multiline to confirm the issue.

## Receiving parts in other warehouse

1. Select the ‘Transfer Receipt’ sub-function. *See Figure 2.12.*

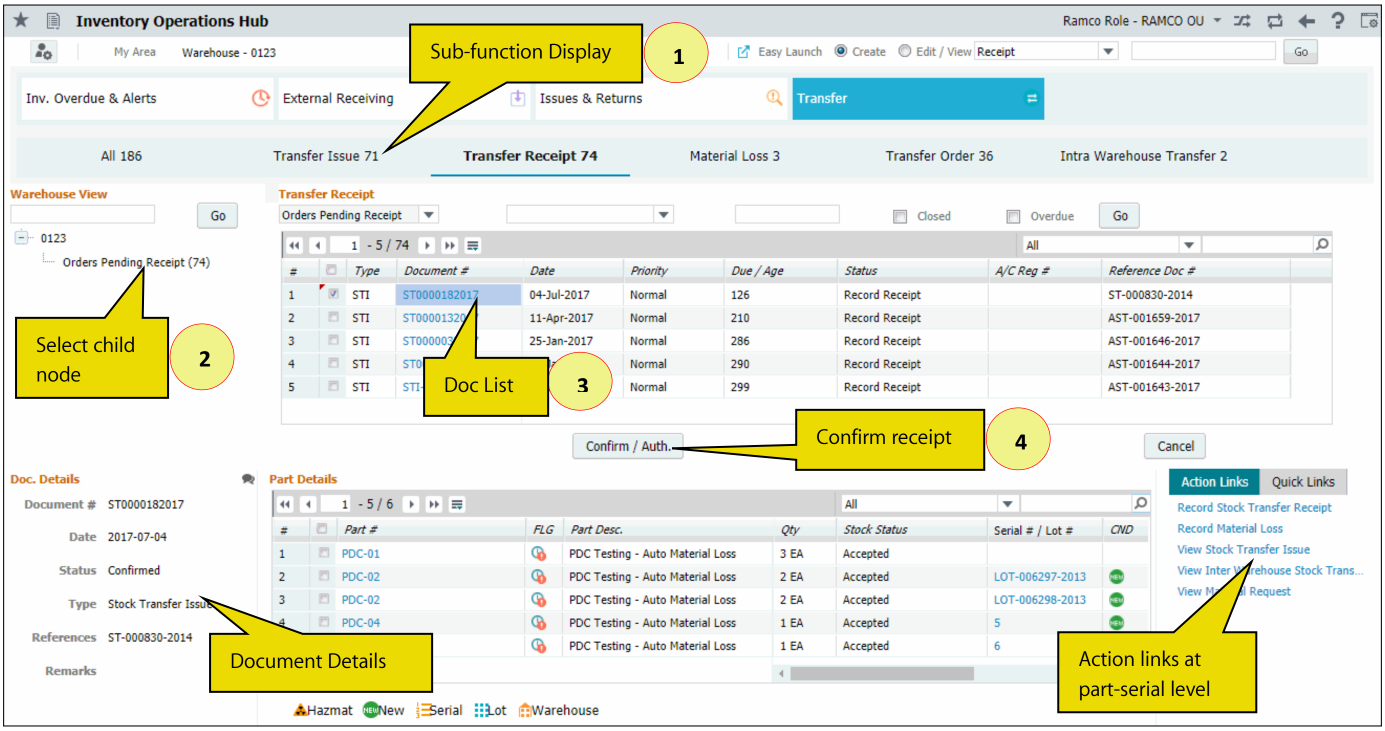


**Figure 2.12 Receiving parts in other warehouse**

2. Click the child node in the tree panel for the sub-function selected. The Document List Panel displays the Count of the Stock Transfer receipts created from a given Warehouse.

3. Click the Document # in the multiline of the Document List Panel. The system displays the following sub-sections:
   - Doc. Details: Document lelve details of the selected document.
   - Part Details: Part level details of the selected document.
   - Detailed level Action Links / Quick Links: Next possible action links for a given document based upon the Next Action displayed in the Next Action column of the Document Preview Panel.

4. Click the **Confirm / Athu.** pushbutton below the multiline to confirm the receipt.

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