

IBM TRIRIGA
Version 10 Release 5

*Inventory Management
User Guide*



Note

Before using this information and the product it supports, read the information in "Notices" on page 19.

This edition applies to version 10, release 5, modification 0 of IBM TRIRIGA and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Managing inventory

With the Inventory Management application, you can issue materials and assets to technicians, maintain accurate stock counts, and ensure that the optimal stock of materials is on hand.

The Inventory Management application provides the following business objects:

Inventory location

Any place where inventory can be stored and distributed, such as a store room or mobile cart. Locations are listed within a hierarchy, with the inventory group at the top level, followed by the inventory primary location, and the levels of inventory storage areas. For example, an inventory group is Las Vegas, the inventory primary location is Las Vegas Campus, the first-level storage area is the warehouse building, and the bottom-level storage area is a bin or shelf.

Inventory item

A consumable object, asset, or vehicle that you manage and store at an inventory location. The inventory item record manages the transactions, quantities, and valuation for the stored items. Inventory batches represent a quantity of inventory items that are received on a specified date for a specified cost. Inventory items are associated with specifications and with product and asset records.

Inventory transaction

An inbound or outbound movement of inventory items. Transaction records are associated with inventory items and are used to track the resulting quantity values. An inventory transaction can be a purchasing transaction, a pending issue transaction, an issue transaction, or an adjustment transaction.

Inventory valuation methods

The unit price of inventory items is tracked by using the average, First In First Out (FIFO), Last In First Out (LIFO), or standard valuation method.

Average

The unit price is the average cost of all purchased items.

FIFO The unit price is the cost of the first purchased item.

LIFO The unit price is the cost of the last purchased item.

Standard

You set the unit price.

FIFO and LIFO methods use inventory batches. The batch in which an item was ordered is used to determine the cost of the item.

Over time, the same inventory item can be purchased at varying costs. These costs, the purchase date, and the quantity that is purchased must be evaluated when the issue cost of the item is calculated. With the average method, the cost value is the average of the costs of all of the items. With the FIFO and LIFO methods, the cost is calculated based on the quantity that is requested and the quantities in the batches. With the standard method, the user sets a cost value for the item.

Unit price

The unit price supports the inbound batch creation and outbound valuation calculation. For inbound transaction types, this field is used for the creation of the inventory batch records.

The following table describes the rules for determining the unit price for inbound inventory transactions.

Table 1. Inbound inventory transactions

Transaction type	Rules
Receipts that are entered manually from inventory item record	Defaults to the unit price on the inventory item.
Receipts from the receiving form	Actual cost from the receiving line item.
Transfer In	Defaults to the unit price on the inventory item.
Negative Adjustments	Reverses a previous positive adjustment. For example, you created a transaction to note that three items are lost. When the items are found, you create another lost transaction and enter -3 to reverse the original transaction. Defaults to the unit price on the inventory item.
Positive Adjustments	Defaults to the unit price on the inventory item.

The following table describes the rules for determining the unit price for outbound inventory transactions.

Table 2. Outbound inventory transactions

Transaction type	Rules
Issued manually from the inventory item record	Calculated based on the valuation method.
Issued from the quick fill form	Calculated average that is based on the valuation method.
Transfer Out	Calculated based on the valuation method.
Negative Adjustments	Calculated based on the valuation method.
Positive Adjustments	Calculated based on the valuation method.

Inventory cost groups

Inventory cost groups are collections of one or more primary locations that are included together for cost purposes.

The following rules apply to inventory cost groups:

- If an inventory group is defined for a primary location, all costing for the primary location and cost items in that group is done at the group level.
- If the primary location is not associated with an inventory group, the costing is done at the item level.
- If an item is not included as a cost item in the group, the costing for that item is done at the item level.

- If you change the currency at the inventory group level, the currency of the associated cost items and inventory items also are changed.
- A primary location can be included in only one cost group. When a primary location is associated with a cost group, you cannot associate it with any other cost group.
- You can add individual or multiple locations to the cost group.
- Inventory locations cannot be removed from the cost group. You can, however, remove cost items or delete the cost group.

Inventory cost items

Cost items are associated with inventory groups and represent the specifications or types of items and the valuation method. Cost items contain the inventory batch records that are associated with the selected primary locations and their related specifications.

The cost item unit price is based on the valuation method. For example, if the valuation method is FIFO, then the unit price reflects the first batch. If the unit price changes, the unit price of the inventory items that are managed by the cost item is also updated. Similarly, if you change the currency or quantity of the inventory cost item, the values of the associated inventory items and batches are changed as well.

Inventory management roles

The inventory management process typically involves inventory managers, service technicians, self-service requesters, and maintenance technicians.

Inventory managers have the following tasks:

- Creation and maintenance of inventory objects, including locations, inventory items, inventory batches, inventory groups, and cost items.
- Movement of items into inventory through purchase requisitions, adjustments, and transfers.
- Movement of items out of inventory through quick fill tickets, work tasks, issues, transfers, adjustments, and cycle counts.

Service technicians are assigned tasks by the inventory manager, for example, picking inventory and completing cycle counts.

Self-service requesters are employees whose inventory needs to be managed. If the inventory item is self-managed, the self-service requester requests the item directly by creating an issue transaction. If the inventory item is managed, the self-service requester must request the item from the inventory manager by creating a pending issue transaction.

Maintenance technicians request inventory by using work tasks.

Integration of inventory management with other applications

Inventory management is fully integrated with other TRIRIGA® Application Platform applications, such as task management, request management, reservation management, and procurement management.

The following applications are tightly integrated with inventory management:

Task management

Technicians can request and receive inventory as part of work tasks.

Reservation management

You can make inventory items available for use by reservation management, such as conference room equipment and vehicles.

Request management

Self-service users can create product requests by using the TRIRIGA Request Central portal.

Procurement management

The movement of items into inventory can be handled by using purchase requisitions. Inventory items can be associated with product records, which in turn can be referenced by a blanket purchase order or service agreement and be purchased from a vendor for a negotiated amount. Inventory specifications are integrated with purchase orders.

Chapter 2. Setting up inventory business objects

As an inventory manager, you must set up the business objects that contain the information about your inventory and facilitate the transactions that move items in and out of inventory. The inventory business objects include classifications, specifications, locations, and inventory items.

Setting up inventory classifications

Classification records provide consistency by controlling field selections and can be used in workflow logic. Examples include inventory groups, inventory categories, ABC classes, and service classes.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security. Based on your system security, you might have no access or limited access to the classification hierarchy.

Procedure

1. Select **Tools > Administration > Classifications**.
2. From the Hierarchy list, select the classification type, such as Inventory Category.
3. Click **New** and click the classification type.
4. Enter the details for the classification.
5. Create and activate the record.

Setting up inventory specifications

Specifications are associated with inventory items, and describe and catalog these inventory items. Specifications determine default values for the inventory item, link material orders with available inventory, and are required for the correct processing of inventory items.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Portfolio > Setup > Specification**.
2. From the **Specifications** list, select a specification type, such as Building Equipment.
3. Click the **Add** action.
4. On the **General** and **Details** tabs, enter the details for the specification.
5. On the **Inventory** tab, in the Inventory General section, select the appropriate classifications for each field.
6. In the Inventory Details section, select the inventory type.
7. Create and activate the record.

Setting up and maintaining inventory locations

Inventory locations are the places where inventory is stored and distributed. You can configure the inventory location hierarchy with as many levels as are required. Examples include geographic areas, store rooms, mobile carts, service trucks, shelves, and bins.

Setting up inventory location groups

The highest level of the inventory hierarchy is the inventory group, which is an optional level. An inventory group can be a geographical area, for example, the Las Vegas area. Inventory groups can also be used to group inventory of a particular type, for example, office supplies.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Inventory Locations**.
2. In the Hierarchy pane, click **New** and select **Inventory Location Group**.
3. On the **General** tab, enter the name.
4. In the Details section, for the inventory location class, select **Group**.
5. In the Manage by Organization section, enter the name of the organization that is responsible for managing the inventory location group.
6. In the Manage by Contact section, enter the name of the contact person.
7. Create and activate the record.

Setting up primary locations

A primary location represents the primary record for the storeroom where the inventory is kept and distributed. Examples include store rooms, mobile carts, service trucks, outdoor storage yards, and motor pools. You create a primary location for each of your storerooms.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Inventory Locations**.
2. In the Hierarchy pane, click **New** and select **Primary Location**.
3. On the **General** tab, enter the name and select the storeroom type.
4. In the Details section, for the inventory location class, select **Primary**.
5. Optional: In the Location section, enter the physical location.
6. In the Manage by Organization section, enter the name of the organization that is responsible for managing the primary location.
7. In the Manage by Contact section, enter the name of the contact person.
8. Create and activate the record.

Setting up inventory storage area

The inventory storage area is the bin, cabinet, or shelf where the inventory is kept. For example, you can have a storeroom with aisles, racks, shelves, and bins. You can create many levels of storage area in the inventory hierarchy.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Inventory Locations**.
2. In the Hierarchy pane, click **New** and select **Storage Area**.
3. On the **General** tab, enter the details of the storage areas.
4. In the Details section, for the inventory location class, select **Storage Area**.
5. Create and activate the record.

Setting up inventory items

After you create a hierarchical view of your inventory locations, you create records to track and manage the inventory items that are in the storage areas.

Inventory items

An inventory item record must exist for each type of consumable item, asset, or vehicle that you manage and store at an inventory location. The inventory item record tracks and manages the transactions, quantities, and valuation for the stored items.

An inventory item can be associated with a specific product record. Products represent items that can be purchased from a particular vendor for a negotiated amount. When you link a product to an inventory item, you can restock items from existing contracts or issue purchase order releases for vendor-managed inventory.

An inventory item can also be associated with an asset, for example, a calibration device. Inventory transactions change the status of the associated assets.

Inventory batches

Inventory batches represent a quantity of inventory items that are received on a specified date for a specified cost. Inventory batches provide the basis for costing based on valuation methods.

For inventory items that use the LIFO or FIFO valuation methods, a batch record is created for every inbound transaction. For outbound transactions, items move out of batches and the quantity in the batches decreases. The available quantity is tracked as items are added to and removed from inventory. After the available quantity reaches zero for a specific batch, the batch is retired.

For inventory items that use the standard or average valuation methods, a single batch record is created, and the quantity and total cost fields are updated. After the available quantity reaches zero, the batch still exists. If outbound transactions are posted, the quantity is a negative value.

Setting up inventory items

You create an inventory item record for each type of consumable item, asset, or vehicle that you manage in the inventory locations.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Click the **Add** action.
3. On the **General** tab, enter the name, units, product, and inventory locations.
4. In the Details section, specify the inventory type, the storeroom type, and the inventory valuation method.
5. If the inventory type is Asset (Assignable) or Asset (Reservable), specify the specification.
6. Create and activate the record.

Chapter 3. Moving items in and out of inventory

Inventory is constantly in a state of flux because items move into and out of inventory as required. Inventory managers need to manage this movement effectively so that the current level of inventory is recorded, an optimum level of stock is maintained, and costs to the organization are controlled.

Inventory transactions

Inventory transactions are used to track the quantities and movements of inventory items.

Transaction records are created by the applications that interface with the inventory system, such as Purchasing, Receiving, and Task Management. You can also create transactions from actions on inventory items.

Inbound transactions include receipts, transfers, adjustments, and items added through cycle counts and returns. Outbound transactions include issues, transfers, adjustments, and items removed through cycle counts.

After the transaction is posted, the quantity is reset to the new value, and you can view the transaction in the associated inventory item record.

Moving inventory items by using adjustments

You can use adjustment transactions to update the quantity of inventory items and to transfer items from one storage area to another.

Adjustment transactions

Adjustment transactions are used for increasing or decreasing the recorded quantity of inventory items. The status of the selected assets changes according to the adjustment.

Adjustment transactions can be inbound, for example, found items, repaired items, or items that are taken out of retirement. Adjustment transactions can also be outbound, for example, lost items, retired items, or damaged items.

An adjustment transaction can have one of the following transaction types:

Inventory Cycle Count

Bases adjustments on a count of actual items on site. This transaction type can be used to fill your initial inventory quantity. You can create asset records in the inventory cycle count transaction. The inventory cycle count transaction is auto-generated by the inventory cycle count task. If you have fewer items were recorded in the cycle count, you post an inventory cycle count transaction with a negative number.

Inventory Transfer

Transfers items from one storage area to another. Partial transfers are supported, and you can create a new inventory item in the destination location or transfer an existing inventory item.

Inventory Lost

Records inventory items that are lost or found. If you find an item, you post an inventory lost transaction with a negative number.

Inventory Damaged

Records inventory items that are damaged.

Inventory Repair

Records inventory items that are being repaired. If you place an item back in stock after it is repaired, you post an inventory repair transaction with a negative number.

Inventory Retire

Records inventory items that are no longer usable.

Inventory Return

Records inventory items that are returned to inventory.

Adjusting quantities of inventory items

You use the adjustment transaction to add or subtract quantities of an inventory item. For example, you can record inventory items that are lost or being repaired, or you can adjust the quantity following a cycle count.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

If you are adjusting for a cycle count, you or another assigned employee must first count the inventory items.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Open the inventory item.
3. In the Adjustments section, click the **Adjustment** action.
4. In the Details section, select the transaction type and enter the quantity to be posted. To subtract the quantity, enter a negative value.
5. Optional: Select the assets to be affected by the adjustment.
6. Click **Post**.

Transferring items between storage areas

You use the adjustment transaction to transfer inventory items from one storage area to another, or to merge one inventory item record with another inventory item record. For example, you can transfer inventory items from one shelf to another.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Open the inventory item.
3. In the Adjustments section, click the **Transfer** action.

4. In the Details section, select the inventory transfer option and enter the quantity to be transferred.
5. Specify one of the following:
 - If the inventory transfer option is **Transfer to Inventory Location**, specify the inventory location to transfer to.
 - If the inventory transfer option is **Transfer to Inventory Item**, specify the inventory item to merge with.
6. Optional: Select the assets to be transferred.
7. Click **Post**.

Assigning cycle count work tasks

As an inventory manager, you need to get a count of the actual inventory items in stock and ensure that your records are accurate. You assign the cycle count work task to the service technician.

Before you begin

You must sign in as an Inventory Manager or other role with appropriate security.

Procedure

1. Select the **Inventory** tab.
2. In the **Related Links - Inventory** pane, select **Inventory Manager**.
3. On the **Inventory** tab, select the **Inventory Items - Reorder/Count** tab.
4. Select the items to be counted.
5. Click the **Count Task** action.
6. On the **General** and **Work Details** tabs, ensure that the details are correct and complete.
7. On the **Resources** tab, assign the person that you want to do the work.
8. Click **Activate**.

Results

The service technician sees the work task for the cycle count on the task list. When you receive the updated count, you can adjust the quantity of the inventory item.

Ordering and receiving inventory items

You can use purchasing transactions to record inventory items that are ordered and received. Alternatively, you can set up the inventory item so that a purchase requisition is created when the stock level reaches a certain point.

Ordering inventory items

You use the purchasing transaction to post items that are on order or requisitioned.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Open the inventory item.
3. In the Inventory Summary section, click the **Order/Receipt** action.
4. In the Detail section, select **Inventory On Order** as the transaction type.
5. Enter the quantity to be posted.
6. Click **Post**.

Receiving inventory items

You use the purchasing transaction to post items that are received into inventory. The receiving transaction type can be used to fill your initial inventory quantity. You can create asset records from received items.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Open the inventory item.
3. In the Inventory Summary section, click the **Order/Receipt** action.
4. In the Detail section, select **Inventory Received** as the transaction type.
5. Select the inventory receiving option.
6. Enter the quantity to be posted.
7. If you do not want asset records to be created when new items are received, clear the **Create Assets on Receipt** check box.
8. Click **Post**.

Setting up automatic reorder of inventory items

You can set up an inventory item so that it is reordered automatically when the quantity reaches the reorder point (ROP).

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Open the inventory item.
3. In the Inventory Purchasing Details section, in the **Purchasing Reorder Logic** list, select **MIN-MAX**.
4. In the **Purchasing Reorder Point** field, enter the quantity at which you want to reorder the inventory item.
5. In the **Economic Reorder Quantity** field, enter the quantity that is ordered when the reorder point is reached.
6. If you do not want a purchase requisition to be created when the reorder point is reached, select the **Auto-Reorder at ROP** check box.
7. Save the inventory item.

Holding and backordering inventory items

You use pending issue transactions to place inventory items on hold or to backorder inventory items. Items that are withheld as safety stock are also added to the total pending issue quantity.

Placing inventory items on hold or backorder

You use pending issue transactions to place inventory items on hold, for example, until the item is required by a technician. You can also use pending issue transactions to backorder an inventory item, for example, while you wait for an item to be delivered.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items** and open the inventory item.
2. In the Hold or Pending Issues section, click the **Hold** action.
3. In the Detail section, select **Inventory Hold** or **Inventory Backorder** as the transaction type.
4. Enter the quantity to be posted.
5. Optional: In the Material Order section, specify the material order for the transaction.
6. Click **Post**.

Withholding inventory items as safety stock

You can enter the quantity of the inventory item that you want to withhold for safety stock. The safety stock quantity is included in the total pending issue quantity.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items** and open the inventory item.
2. In the Hold or Pending Issues section, enter a value in the **Quantity Safety Stock** field.
3. Save the inventory item.

Setting up automatic reorder of inventory items

You can set up an inventory item so that it is reordered automatically when the quantity reaches the reorder point (ROP).

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items**.
2. Open the inventory item.
3. In the Inventory Purchasing Details section, in the **Purchasing Reorder Logic** list, select **MIN-MAX**.
4. In the **Purchasing Reorder Point** field, enter the quantity at which you want to reorder the inventory item.
5. In the **Economic Reorder Quantity** field, enter the quantity that is ordered when the reorder point is reached.
6. If you do not want a purchase requisition to be created when the reorder point is reached, select the **Auto-Reorder at ROP** check box.
7. Save the inventory item.

Issuing, returning, and loaning inventory items

You can use issue transactions to issue items, place items on loan, or return inventory items and material orders. Issue transactions are integrated with the product request and task material order process. Alternatively, you can issue inventory items by using issue tickets or quick fill tickets.

Issuing or returning inventory items

You can use the issue transaction to issue items to another person, such as a technician or a self-service user. You can also use the issue transaction to return an item or to place an item on loan.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Items** and open the inventory item.
2. In the Issued or Returned section, click the **Issue** action.
3. In the Detail section, select **Inventory Issue**, **Inventory Return**, or **Inventory On Loan** as the transaction type.
4. Enter the quantity to be posted.
5. In the Reference section, select the product request or task that the items are issued for.
6. Optional: In the Material Order section, specify the material order for the transaction.
7. Optional: In the Select Assets for Issue section, specify the assets to be issued.
8. Click **Post**.

Creating issue tickets for material orders

A material order is created for each requested product. Material orders are assigned to the appropriate organization or location for fulfillment. You can fulfill material orders for in-house inventory by using issue tickets.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select the **Inventory** tab.
2. In the **Related Links - Inventory** pane, select **Inventory > Inventory Manager** and click the **Order Processing** tab.
3. On the **Orders** tab, select the material orders that you want to include on the issue ticket, and click **Issue Ticket..**
4. Enter the primary inventory location and click **Create Draft**.
5. In the Orders Items to Issue section, open the line item.
6. In the Details section, ensure that the **Complete Material Order** task check box is selected.
7. In the Active Transaction section, click **Add** to create a pending issue transaction.
8. In the **Transaction Type** list, select **Inventory Hold**. Enter the quantity to be posted and the quantity to issue.
9. In the Primary Inventory Item section, click **Find** and select the inventory item.
10. Post the pending issue transaction.
11. Save and close the issue ticket item.
12. Issue the issue ticket.

Issuing items by using quick fill tickets

You can use a quick fill ticket to process inventory items without going through the task process.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Inventory > Manage Inventory > Quick Fill Tickets** and click the **Add** action.
2. Specify the primary inventory location.
3. Optional: In the Reference section, specify the product request or task.
4. In the Details and Ship/Deliver To sections, enter the shipping details.
5. In the Parts section, enter the parts that are affected by the quick fill ticket.
6. In the Equipment section, enter the equipment that is affected by the quick fill ticket.
7. Click **Create Draft**.
8. Click **Issue Inventory Item**.

Assigning work tasks for picking inventory

As an inventory manager, you can instruct your service technicians to pick parts and equipment from inventory.

Before you begin

You must sign in as an Inventory Manager or another role with appropriate security.

Procedure

1. Select **Projects > Set Up > Inventory Pick Work Task** and click the **Add** action.
2. On the **General** tab, specify the details.
3. On the **Work Details** tab, select the inventory locations and the material order work tasks.
4. Specify the inventory items that are picked and the inventory location for staging.
5. Click **Activate**.

Results

The service technician sees the work task for picking inventory on the task list.

Creating reservations against inventory

Reservable assets are loaned for a period and then returned to inventory. Reservable assets include tools and test equipment that are reserved for use on specific tasks, conference room equipment that is reserved for a meeting, or vehicles that are reserved from a motor pool. You can use the Inventory Manager form to view existing reservations and create new reservations.

Procedure

1. Select the **Inventory** tab.
2. In the **Related Links - Inventory** pane, select **Inventory > Inventory Manager** and click the **Reservable Inventory** tab.
3. On the **List View** tab, select the assets that you want to reserve.
4. On the **Availability View** tab, adjust the bars to specify the date and time of the reservation.
5. Click the **Equipment Reservation** action.
6. On the **Asset Reservation** form, review the details and click **Submit**.
7. Confirm the details, enter payment information if required, and click **Submit**.

Results

A commitment is placed against the selected equipment for the date and time of the reservation.

Chapter 4. Counting and picking inventory items

As a service technician, you are assigned work tasks by the inventory manager. With the inventory count, you ensure that the actual quantity of inventory items matches the recorded quantity. With the inventory pick, you pick the required parts and equipment from the inventory location.

Counting inventory items

As a service technician, you can be assigned a cycle count work task by an inventory manager. To complete the task, you must physically count the inventory items and record the actual quantity.

Before you begin

You must sign in as a Service Technician or other role with appropriate security.

Procedure

1. Select the **Inventory** tab.
2. In the **Related Links - Inventory** pane, select **Tasks > Cycle Count**.
3. Open the inventory cycle count work task.
4. If the actual count differs from the recorded count, update the inventory item count.
5. Click **Complete**.

Results

The following records are created, if applicable:

- Asset records are created and associated with the appropriate inventory item.
- Lost log records are created and associated with the respective asset records.

The assignment statuses of the asset records and the inventory item records are updated.

Picking inventory items

As a service technician, you can be assigned a work task to pick inventory. To complete the task, you must pick the parts and equipment from the storage area and record the quantity in the task.

Before you begin

You must sign in as a Service Technician or other role with appropriate security.

Procedure

1. Select the **Inventory** tab.
2. In the **Related Links - Inventory** pane, select **Tasks > Inventory Pick**.
3. Open the inventory pick work task.

4. Enter the parts and equipment that are picked and the required quantities of these parts and equipment. You can select only the parts and equipment that are available at the primary work location.
5. Click **Save** and **Complete**.

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