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Navigation

Logging into AiM

Logging into the system: https://mcc.battery.cofc.edu/fmax

User Name: This field is populated with the user login.
Password: This field is populated with the password.
Login: Clicking the login button passes the user login and password information to the system.
Inventory Setups

*Warehouse Creation*

This method is used to create a Warehouse.

1) Login to AiM™ and click the 'Inventory' link from the menu channel.
2) From the ‘Inventory’ menu channel, click the ‘Warehouse Definition’ link.

![Figure 2](image)

3) Click the ‘New’ button.

![Figure 3](image)
4) Provide a Warehouse Identification Code.

![Warehouse Identification Code](image1)

**Figure 4**

5) Provide a detailed Description.

![Detailed Description](image2)

**Figure 5**
6) Click the ‘Region’ Zoom icon.

![Figure 6](image)

7) Select the appropriate ‘Region’ of this Warehouse.

![Figure 7](image)

8) Select the ‘Facility’ of this Warehouse.

![Figure 8](image)
9) Select the ‘Property’ of this Warehouse.

![Property Table]

**Figure 9**

10) Select the ‘Location’ of this Warehouse.

![Location Table]

**Figure 10**
11) Click the Account Setup link.

![Figure 11]

12) Click the ‘Offset Account’ (Index) ‘Zoom’ icon. Select the Offset Index and Account by follow the prompts.

![Figure 12]

13) Select the appropriate Index link.

*Note: Use the Search feature to find a specific Index.*

![Figure 13]
14) Select the appropriate Account link.

*Note: Use the Search feature to find a specific Account.*

![Figure 14](image)

15) Select the ‘Done’ button.

![Figure 15](image)

16) Select the ‘Save’ button.

![Figure 16](image)
17) Click the AiM™ logo to return to the main Work Desk.

**Figure 17**

18) The Main Work Desk. The Process is complete.

**Figure 18**
**Inventory Part Profile**

This method is used to create a new Inventory Part Profile.

1) Login to AiM™ and click the 'Inventory' link from the menu channel.
2) From the ‘Inventory’ menu channel, click the ‘Inventory Part Profile’ link.

![Figure 20](image)

3) Click the ‘New’ button.

![Figure 21](image)
4) Provide an Inventory Part identification. The identification can consist of numbers and/or letters.

![Figure 22](image1)

**Figure 22**

5) Provide a detailed Description.

![Figure 23](image2)

**Figure 23**
6) Click the Class ‘Zoom’ icon. Follow the prompts.

![Figure 24][1]

7) Select the appropriate Class. Click the ‘Class’ link.

![Figure 25][2]

8) Select the Inventory Item. Click the ‘Inventory Item’ link.

![Figure 26][3]
9) Click the UOM (Unit of Measure) ‘Zoom’ icon.

Figure 27

10) Select the appropriate Unit of Measure.

Figure 28
11) Select the ‘Save’ button.

Figure 29

12) Click the AiM™ logo to return to the main Work Desk.

Figure 30
13) The main Work Desk. The Process is complete.
**Warehouse Bin Definition**

This method is used to define a Warehouse Bin.

1) Login to AiM™ and click the 'Inventory' link from the menu channel.

![Image of AiM™ Work Desk](image-url)
2) From the ‘Inventory’ menu channel, click the ‘Warehouse Bin Definition’ link.

![Figure 33: Warehouse Bin Definition menu item highlighted.]

3) Click the ‘New’ button.

![Figure 34: Warehouse Bin Definition form with New button highlighted.]

---

20
4) Provide a Bin Identification Code.

![Figure 35](image1)

5) Provide a detailed Description.

![Figure 36](image2)
6) Click the ‘Warehouse’ Zoom icon.

![Figure 37]

7) Select the ‘Warehouse’ click the associated Warehouse link.

![Figure 38]
8) Insert your Target Level by entering the numeric value in this associated box.

*Note: Optional Minimum Quantity, Maximum Quantity, Reorder Level, and Reorder Quantity values can be added.*

![Figure 39](image1)

9) Click the ‘Save’ button.

![Figure 40](image2)
10) Click the AiM™ logo to return to the main Work Desk.

Figure 41
11) The Main Work Desk. The Process is complete.
Inventory Processing

Pick Ticket

This method is used to create a Pick Ticket.

1) Login to AiM™ and click the 'Inventory' link from the menu channel.

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**Figure 43**
2) From the ‘Inventory’ menu channel, click the ‘Pick Ticket’ link.

[Image: Figure 44]

3) Click ‘New’ button.

[Image: Figure 45]
4) Provide a detailed Description.

5) Click the ‘Work Order’ Zoom icon. Follow the prompts and select the appropriate Work Order and Phase.

Figure 46

Figure 47
6) Click ‘Execute’ button.

Note: Add search criteria to find a specific Work Order.

7) Select the ‘Work Order’ by clicking the associated link.
8) Click the ‘Warehouse’ Zoom icon to select the Warehouse.

![Figure 50](image1.png)

9) Select the ‘Warehouse’ by clicking the associated link.

![Figure 51](image2.png)
10) Click the ‘Date Needed’ Calendar Icon 📅. Select the appropriate date.

![Figure 52](image1.png)

11) Click the ‘Status’ Zoom 📦 icon.

![Figure 53](image2.png)
12) Select the appropriate ‘Status’ by clicking the associated link.

![Figure 54](image)

13) Click the ‘Add’ button to add the Line Item.

Note: if a Material Request was created, click the ‘Load Material Request’ link instead of the Add Detail icon. Then follow the prompts and select the appropriate Material Request.

![Figure 55](image)
14) Click the ‘Part’ Zoom icon to select the Part and Bin.

![Figure 56](image)

15) Click ‘Execute’ button.

Note: Add search criteria to find a specific part.

![Figure 57](image)

16) Select the appropriate part, click the ‘Part’ link.

![Figure 58](image)
17) Add the desired quantity.

![Figure 59](image1.png)

**Figure 59**

18) Optional: click the ‘Add’ button to add another Line Item. Repeat the previous steps (14 - 17).

![Figure 60](image2.png)

**Figure 60**
19) Select the ‘Done’ button to return to the previous screen.

![Figure 61](image1)

20) Select the ‘Save’ button.

![Figure 62](image2)
21) Select the ‘Edit’ button.

Figure 63
22) Select the ‘Status’ Zoom icon. Select the ‘Finalized’ status.

Note: Placing the Pick Ticket into the ‘Finalized’ status, the Pick Ticket becomes eligible for a Counter Release.

Figure 64

23) Click the ‘Save’ button.

Figure 65
24) Click the AiM™ logo to return to the main Work Desk.

![Figure 66](image)


![Figure 67](image)
**Counter Release**

This method is used to Process an Inventory Counter Release.

1) Login to AiM™ and click the ‘Inventory’ link from the menu channel.

![Figure 68: AiM WorkDesk Interface](image-url)
2) From the ‘Inventory’ menu channel, click the ‘Counter Release’ link.

![Image of Inventory menu with Counter Release highlighted](image1)

**Figure 69**

3) Click the ‘New’ button.

![Image of Counter Release screen](image2)

**Figure 70**
4) Add a detailed Description.

![Figure 71](image)

5) Click the 'Released By' Zoom icon.

*Note: The only employee's shown in the selection list are assigned to the Warehouse.*

![Figure 72](image)
6) Select the appropriate Employee. Click the associated ‘Employee ID’ link.

Figure 73

7) Click the ‘Released To’ Zoom icon. Follow the prompts.

Figure 74
8) Select the employee by clicking the associated ‘Employee ID’ link.

![Figure 75](image1)

9) Click the ‘Warehouse’ the Zoom icon.

![Figure 76](image2)

10) Select the appropriate ‘Warehouse’ by clicking the associated link.

![Figure 77](image3)
11) Click the ‘Add’ button.

Figure 78

12) Click the ‘Part’ Zoom icon.

Figure 79
13) Click the ‘Execute’ button.

*Note: Add search criteria to find a specific part.*

![Figure 80](image)

14) Select the appropriate Inventory Part by clicking the associated ‘Part’ link.

![Figure 81](image)
15) Add the ‘Released Quantity’.

*Note: The Released Quantity cannot be larger than the On-Hand Quantity.*

**Figure 82**

16) Optional: Click the ‘Add’ button. Follow the previous steps (12 - 15).

**Figure 83**
17) Click the ‘Work Order’ Zoom icon. Follow the prompts.

Figure 84
18) Click the ‘Execute’ button.

*Note: Add search criteria to find a specific Work Order.*

![Figure 85](image)

19) Select the appropriate Work Order by clicking the associated link.

![Figure 86](image)
20) Click the ‘Done’ button.

Figure 87

21) Click the ‘Save’ button to return to the previous screen.

Figure 88
22) Click the AiM™ logo to return to the main Work Desk.

![Figure 89](image_url)

23) The main Work Desk. The Process is complete.

![Figure 90](image_url)
**Counter Return**

This method is used to process a Counter Return.

1) Login to AiM™ and click the ‘Inventory’ link from the menu channel.
2) From the ‘Inventory’ menu channel, click the ‘Counter Return’.

![Figure 92](image)

3) Click the ‘New’ button.

![Figure 93](image)
4) Click the ‘Execute’ button.

*Note: Add search criteria to find a specific transaction.*

![Figure 94](image)

5) Select the ‘Transaction’ by clicking the associated link.

![Figure 95](image)

6) Click the ‘Returned By’ Zoom icon.

![Figure 96](image)
7) Choose the appropriate employee by clicking the associated ‘Employee ID’ link.

Figure 97

8) Click the ‘Returned To’ Zoom icon. Follow the prompts.

Figure 98

9) Choose the appropriate employee by clicking the associated ‘Employee ID’ link.

Figure 99
10) Click the Line Items link.
11) The Default Bin will automatically populate.

Figure 101
12) Add the quantity of items returned.

![Figure 102](image1)

**Figure 102**

13) Click the ‘Done’ button.

![Figure 103](image2)

**Figure 103**
14) Optional: To return all items on the Counter Release, click the ‘Return All’ button.

![Figure 104](image1)

15) Click the ‘Save’ button.

![Figure 105](image2)
16) Click the AiM™ logo to return to the main Work Desk.

Figure 106

17) The main Work Desk. The Process is complete.

Figure 107
Reorder Generator
This method is used to Generate Reorders.

1) Login to AiM™ and click the ‘Inventory’ link from the menu channel.
2) From the ‘Inventory’ menu channel, click the ‘Inventory Reorder Generator’ link.

![Figure 109](image1.png)

3) Click the ‘New’ Button.

![Figure 110](image2.png)
4) Provide a detailed description.

Figure 111

5) Click the ‘Start Bin’ Zoom icon.

Note: For this exercise, we will utilize the Bin Filter Block to filter generated Inventory Parts.

Figure 112
6) Select the Start Bin. Click the associated Bin link.

7) Click the ‘End Bin’ Zoom icon.
8) Select the End Bin. Click associated Bin link.

![Bin Location Screen](image)

**Figure 115**

9) Click the ‘End Date’ Calendar Icon. Select the appropriate Date.

![Inventory Reorder Generator Screen](image)

**Figure 116**
10) Click the ‘Warehouse’ Zoom icon.

![Figure 117]

11) Select the appropriate Warehouse by clicking the associated link.

![Figure 118]
12) Click the ‘Save’ button.

![Figure 119](image)

13) Click the ‘Generate’ button to generate the Purchase Orders.

![Figure 120](image)
14) Information note appears. Click the ‘Yes’ button.

![Figure 121](image1.png)

15) Click the AiM™ logo to return to the main Work Desk.

![Figure 122](image2.png)
16) The main Work Desk. The Process is complete.
Inventory – Physical Count

**Physical Count Generation**

This method is used to create a Physical Count.

1) Login to AiM™ and click the ‘Inventory’ link from the menu channel.

![Image showing the AiM™ Work Management interface](image-url)
2) From the ‘Inventory’ menu channel, click the ‘Physical Count Generator’ link.

![Figure 125](image1)

3) Click the ‘New’ Button

![Figure 126](image2)
4) Add a detailed description in the Description box.

Figure 127

5) Click the ‘End Date’ Calendar Icon. Select the appropriate Date.

Figure 128
6) Click the Warehouse ‘Zoom’ icon.

**Figure 129**

7) Select the appropriate Warehouse by clicking the associated link.

**Figure 130**
8) Click the ‘Save’ button.

![Figure 131](image1)

9) Click the ‘Generate’ button to generate the Physical Count Worksheet(s).

![Figure 132](image2)
10) The Physical Count Worksheet is generated.

![Figure 133](image)

11) Click the AiM™ logo to return to the main Work Desk.

![Figure 134](image)
12) The main Work Desk. The Process is complete.
Physical Count Worksheet
This method is used to process a Physical Count Worksheets.

1) Login to AiM™ and click ‘Inventory’ link from the menu channel.
2) From the ‘Inventory’ menu channel, click the ‘Physical Count Worksheet’.

Figure 137

3) Click the ‘Search’ button.

Figure 138
4) Click the ‘Execute’ button to load all worksheets that have been generated.

![Figure 139](image1.png)

5) Click on the Transaction number link to display the Physical Count Worksheet.

![Figure 140](image2.png)

6) Click the ‘Edit’ button.

![Figure 141](image3.png)
7) Click the ‘Status’ Zoom icon.

![Figure 142]

8) Change the status from ‘Generated’ to ‘Counting’. Click the ‘Counting’ status link.

![Figure 143]
9) For each line, add the physical count in the 'Item Count' field.

**Figure 144**

10) For each line, click the Calendar icon to populate the 'Count Date' field.

*Note: When you save the record, the Count Date will automatically populate.*

**Figure 145**
11) Click the ‘Save’ button.

![Figure 146](image)

12) Click the ‘Edit’ button.

![Figure 147](image)
13) Click the ‘Status’ Zoom icon.

![Physical Count Worksheet](image)

**Figure 148**

14) Change the status from ‘Counting’ to ‘Finalized’. Click the Finalized status link.

![Physical Count Status](image)

**Figure 149**
15) Click the ‘Save’ button.

![Figure 150](Image 37x440 to 586x679)

16) Click the ‘Edit’ button.

![Figure 151](Image 446x720 to 577x767)
17) Click the ‘Status’ Zoom icon.

![Figure 152]

18) Select the ‘Approved’ status from the list. Click on the ‘Status’ link.

![Figure 153]
19) Click the ‘Save’ button.

![Figure 154](image)

20) The Inventory bin counts are now updated.

![Figure 155](image)
21) Click the AiM™ logo to return to the main Work Desk.

Figure 156

22) The main Work Desk. The Process is complete.

Figure 157