

Mobile MAXIMO - Inventory User Guide



Release 4.1.1

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MOBILE MAXIMO - INVENTORY

Mobile MAXIMO - Inventory Outline

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CHAPTER 1 INTRODUCTION

About this Chapter

This chapter contains an Introduction to the Mobile MAXIMO - Inventory module and a listing of the Software Requirements and Hardware Requirements for running this application.

Introduction

The Mobile MAXIMO - Inventory module allows you to use handheld wireless devices to issue materials and perform a physical count with real-time database connections to the Enterprise Asset Maintenance (EAM) system.

Among the many benefits to using the Mobile MAXIMO - Inventory module are:

- an easy to use interface
- seamless integration to MAXIMO
- mobile capabilities in places where it is physically needed, such as a storeroom or loading dock
- elimination of the need to move between fixed terminals and the bins and docks where the materials are handled

- bar code scanning (available on most handheld devices) to use for data entry

Software Requirements

This section lists software requirements for the Application Server for Business Components (hereafter referred to as Application Server), Database Server, and Client.

Application Server

- Application Server running Windows NT 4.0 Server with Service Pack 5, Windows 2000 Server, or Advanced Server
- MAXIMO Release 4.1.1

NOTE: *This version of the Application Server does not require Microsoft's Internet Information Server (IIS). If not needed, remove it.*

However, if IIS cannot be removed be certain that it does not use port 80 as this port is used by The Apache Software Foundation's JSP server.

Database Server

For Microsoft SQL Server only:

- Windows NT 4.0 Server with Service Pack 5 or Service Pack 6A

- Microsoft SQL Server 6.5: Service Pack 5A or Microsoft SQL Server 7.0: Service Pack 1 or Service Pack 2

For Oracle only:

- Oracle 7, Oracle 8 Server, or Oracle 8i including:
Oracle 7 RDBMS version 7.3.4 or Oracle8, Oracle 8i RDBMS version 8.x

Client

- PDA (Personal Desktop Assistant) or handheld device with web browser using HTML 4.0 or higher
- To support bar code scanning, the browser running on your PDA must support the following HTML tags/attributes:

Tag	Attribute
INPUT Type="TEXT"	STISCAN
	STISUBMIT
	STICMD
IMG	STIKEYBOARD

An example of a browser that supports these attributes is the Spectrum24[®] Web Client that runs on the Symbol[®] SPT 1700.

Hardware Requirements

This section lists hardware requirements for the Application Server and Client.

Application Server

The Application Server provides business logic and framework for the MAXIMO Self-Service Applications. We recommend using a dedicated machine running Microsoft Windows NT Server 4.0, with Service Pack 5 or higher, Windows 2000 Server, or Windows 2000 Advanced Server.

MAXIMO uses The Apache Software Foundation Tomcat JSP Server for the Java Server Pages (JSP) technology. This webserver is used for accepting HTTP requests from client programs (Web Browsers) and for responding in HTML content. Whenever there is a client request for a JSP page, the JSP page is processed by the webserver and the result of the JSP page is sent back to the client in HTML content. Please refer to the <http://java.sun.com/products/jsp/index.html> link for more information on Java Server Pages Technology.

This version of the Application Server does not require Microsoft's Internet Information Server (IIS). If not needed, remove it. However, if IIS cannot be removed be certain that it does not use port 80 as this port is used by The Apache Software Foundation Tomcat JSP server.

Configuration requirements will vary according to site-specific variables such as Self-Service Applications employed, database platform, number of connecting

client workstations, and desired performance levels. While PSDI does not make any formal requirements relative to hardware/software specifications of the Application Server, we recommend at minimum employing a dedicated, Intel-based Pentium 600 MHz dual processor with 1 GB RAM.

Client

- Mobile MAXIMO - Inventory is designed to be used on a PDA-sized device such as those utilizing the Windows CE or Palm OS operating system.
- Mobile MAXIMO - Inventory runs on the browser utilized by your PDA device.
- The PDA device should be able to connect to the Application Server on your network via either radio frequency or cellular modem.

CHAPTER 2 INSTALLATION

Installation Guidelines

The installation organizes the files on your disk(s) as follows:

Mobile MAXIMO - Inventory

Component	Folder Name	Size (MB)
Application Server	MXSERVER	200
Wireless	MXSERVER	30
Total MB (complete system)		230

We strongly recommend that you use the default folder name shown above (MXSERVER). This name is displayed as the default during installation. By using this default name, we can provide better quality support in case you run into any problems during installation.

Running the Mobile MAXIMO - Inventory Module Setup Program

The Mobile MAXIMO – Inventory module Setup Program contains all the files necessary to install Mobile MAXIMO.

Starting the Mobile MAXIMO - Inventory Module Setup Program

1. Insert the License Disk into drive A.
2. Insert the MAXIMO Release 4.1.1 Mobile MAXIMO - Inventory Module CD into the CD-ROM drive.
3. Type: **d:\setup** (*where d* is your CD-ROM drive) and select **OK** or press **Enter**.

or

Using Windows Explorer, open your CD-ROM drive folder and double-click **SETUP.EXE**.

4. The Mobile Maximo Setup program displays a series of screens and dialog boxes. All of these are listed below, along with comments that may be relevant to some of your choices. Follow the on-screen instructions for performing the installation procedure.

Welcome – Note that it is recommended that you exit all other Windows programs (e.g., Word, Excel) before continuing. You may leave Windows Explorer open.

Specify License Location – The default location of the license file (MAXMAST.OUT) is the A:\>

drive. Your license file may not necessarily be on that drive. If necessary, use the Browse option to specify another location for the license file.

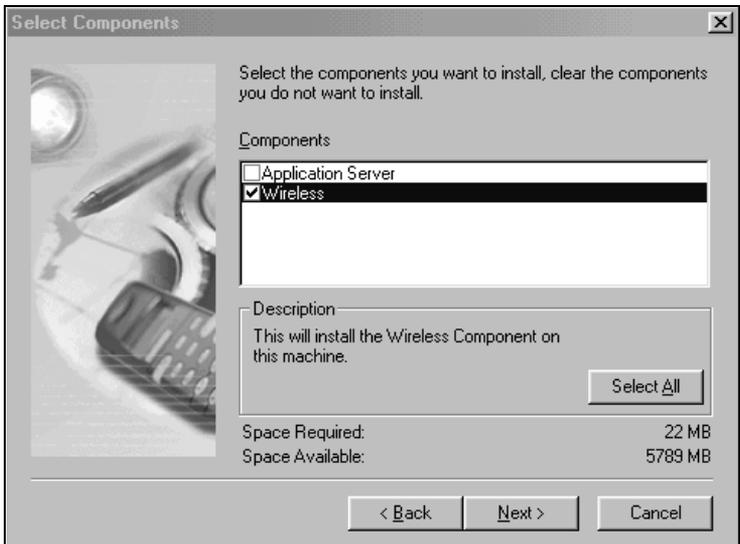
Choose Destination Location – Enter the location where you want to install the Mobile MAXIMO - Inventory module.

If Application Server was previously installed, the default is the drive and folder where the Application Server was installed.

If Application Server was not previously installed, the default is the local drive containing the MXSERVER folder.

Use the Browse option to select a different drive or path.

Select Components – As described in the following two figures, select the components that you want to install.



If you are running MAXIMO Release 4.1.1 Self-Service Work Requests or Self-Service Requisitions, click on Wireless only.



If you are not yet running MAXIMO Release 4.1.1 Self-Service Work Requests or Self-Service Requisitions, click on both Application Server and Wireless.

The Mobile MAXIMO - Inventory module has now been successfully installed. The ensuing chapters will detail the use of the device.

NOTE: For further information on continuing with the Maximo Setup Program, please see your MAXIMO Release 4.1.1 Installation Guide.

CHAPTER 3 GETTING STARTED

About this Chapter

This chapter describes how you can log in and begin using the Mobile MAXIMO - Inventory module.

Logging In

The Login screen allows you to login to MAXIMO. Enter your assigned User Name and Password in these fields. Tap on Sign in.

User Name	<input type="text"/>
Password	<input type="password"/>
	<input type="button" value="Sign In"/>

NOTE: *The screens displayed in this document are for illustration purposes only. They are not intended to show the actual screens as they might appear on your PDA device.*

Profile for: MAXIMO
Default Storeroom:

Default Storeroom Selection Screen

The first time you log into the Mobile MAXIMO - Inventory module, you will be prompted to enter your default storeroom.

To do this, enter your storeroom in the Default Storeroom field and tap on Save to accept. This will make the selected storeroom your default storeroom.

Mobile MAXIMO - Inventory

Storeroom: CENTRAL

[Issues](#)
[Physical Count by Item](#)
[Physical Count by Item](#)
[Physical Count by Items Due to be Counted](#)

[Logout](#)

MAXIMO 4i Release 4.1

Once this information has been entered, the Mobile MAXIMO - Inventory screen is displayed.

NOTE: *In MAXIMO, this information can be updated through the Default Storeroom field in the Labor Application.*

Mobile MAXIMO - Inventory Screen

The main page of the device is the Mobile MAXIMO - Inventory screen. From here, you can select any one of the following functions:

- Issues
- Physical Count by Bins
- Physical Count by Item
- Physical Count by Items Due to be Counted

Each of these topics is described in detail in the chapters that follow.

NOTE: *On many screens you can logout from Mobile MAXIMO - Inventory by tapping on Logout. If a transaction is in progress, that information will not be saved unless the transaction was complete.*

CHAPTER 4 ISSUES

Introduction

Mobile MAXIMO - Inventory allows you to charge issues based on the following criteria:

- Work Order
- Material Request
- Equipment
- Location
- GL Account

This chapter describes in detail how to enter issues for each of these criteria.

Issuing Reservations on Work Orders

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

1. From the Mobile MAXIMO - Inventory screen, tap on Issues.

Storeroom: CENTRAL
What do you want to charge the issue to?

[Work Order](#)
[Material Request](#)
[Equipment](#)
[Location](#)
[GL Account](#)

[Logout](#) [Main Menu](#)

2. From the Select Charge Type screen, tap on Work Order.

Storeroom: CENTRAL

Enter *Work Order*:

[Issue based on reservations](#)

[Issue other materials](#)

[Logout](#) [Issues Main](#)

3. Enter a valid work order number. A valid work order is any work order that is not waiting for approval.
4. Tap on Issue based on reservations.

Issue Reserved Item
 Storeroom: CENTRAL

Item 1 of 6

Item: 217219

Bin:

Quantity:

[Issues Main](#)

- The Issue Reserved Item screen scrolls through the reservations item by item.

Storeroom: CENTRAL

Item: 217219

Desc: Plate, Chrome Plated

Rotating: N

Stock Type: MECH

Lot Type: NOLOT

- Tap on Item to display detailed information about the item selected including a description, whether or not the item is rotating, the stock type, and lot type.

7. After reviewing the item information, tap on Back to return to the Issue Reserved Item screen.
8. Tap on Issue to issue the item or tap on Skip to go on to the next reserved item.
9. After scrolling through items for this Work Order, tap on Issues Main to return to the Select Charge Type screen.

Issuing Material to Work Orders

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

1. From the Mobile MAXIMO - Inventory screen, tap on Issues.

Storeroom: CENTRAL
 What do you want to charge the issue to?

[Work Order](#)
[Material Request](#)
[Equipment](#)
[Location](#)
[GL Account](#)

[Logout](#) [Main Menu](#)

2. From the Select Charge Type screen, tap on Work Order.

Storeroom: CENTRAL

Enter *Work Order*:

[Issue based on reservations](#)

[Issue other materials](#)

[Logout](#) [Issues Main](#)

3. Enter a valid work order number. A valid work order is any work order that is not waiting for approval.
4. Tap on Issue other materials.

Storeroom: CENTRAL

Work Order: 1009

Item:

Bin:

Quantity:

Issues Main

5. Enter an item, bin, and quantity.

If you enter an invalid value and tap issue, a message is displayed identifying the field and requesting another value.

6. Tap on issue to issue the material to a work order. The screen is redisplayed. Each of the fields is ready for the next item to be issued.
7. Tap on Issues Main to return to the Select Charge Type screen.

Issuing to a Material Request

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

1. From the Mobile MAXIMO - Inventory screen, tap on Issues.

Storeroom: CENTRAL
What do you want to charge the issue to?

[Work Order](#)
[Material Request](#)
[Equipment](#)
[Location](#)
[GL Account](#)

[Logout](#) [Main Menu](#)

2. From the Select Charge Type screen, tap on Material Request.

Storerroom: CENTRAL

Enter *Material Request*:

[Logout](#) [Issues Main](#)

3. Enter a material request in the Material Request field and tap on Find.

Issue Reserved Item
Storerroom: CENTRAL

Item 1 of 2

Item: 4-2100

Bin:

Quantity:

[Issues Main](#)

4. If the Material Request is recognized as valid, the Issue Reserved Item screen is displayed.

If the Material Request is invalid, a message is displayed. Tap on OK to return to the Material Request field and enter a valid material request.

5. Tap on Skip to go to the next item or tap on Issue to issue to the material request. After an item is issued,

the Issue Reserved Item screen is redisplayed. Each of the fields is ready for the next item to be issued.

6. Tap on Issues Main to return to the Select Charge Type screen.

Issuing to Equipment

NOTE: All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.

1. From the Mobile MAXIMO - Inventory screen, tap on Issues.

Storeroom: CENTRAL
What do you want to charge the issue to?

[Work Order](#)
[Material Request](#)
[Equipment](#)
[Location](#)
[GL Account](#)

[Logout](#) [Main Menu](#)

2. From the Select Charge Type screen, tap on Equipment.

Storeroom: CENTRAL

Enter ***Equipment:***

Logout Issues Main

3. Enter a valid value in the Equipment field and tap on Find.
4. If the equipment is recognized as valid, the Issue Item screen is displayed.

If the equipment is invalid, a message is displayed. Tap on OK to return to the Equipment field and enter a valid equipment value.

Storeroom: CENTRAL

Equipment: COVER-01

Item:

Bin:

Quantity:

Issues Main

5. At the Issue Item screen, enter an item, bin, and quantity for that equipment.
6. Tap on Issue to issue to the equipment. The Issue Item screen is redisplayed. Each of the fields is ready for the next item to be issued.
7. Tap on Issues Main to return to the Select Charge Type screen.

Issuing to Location

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

1. From the Mobile MAXIMO - Inventory screen, tap on Issues.

Storeroom: CENTRAL
What do you want to charge the issue to?

[Work Order](#)
[Material Request](#)
[Equipment](#)
[Location](#)
[GL Account](#)

[Logout](#) [Main Menu](#)

2. From the Select Charge Type screen, tap on Location.

Storeroom: CENTRAL

Enter *Location*:

[Logout](#) [Issues Main](#)

3. Enter a location in the Location field. Tap on Find.
4. If the Location is recognized as valid, the Issue Item screen is displayed.

If the Location is invalid, a message is displayed. Tap on OK to return to the Location field and enter a valid location.

Storeroom: CENTRAL

Location: BR400

Item:

Bin:

Quantity:

Issues Main

5. At the Issue Item screen, enter an item, bin, and quantity for that item.
6. Tap on Issue to issue to the location. The Issue Item screen is redisplayed. Each of the fields is ready for the next item to be issued.
7. Tap on Issues Main to return to the Select Charge Type screen.

Issuing to a GL Account

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

1. From the Mobile MAXIMO - Inventory screen, tap on Issues.

Storeroom: CENTRAL
What do you want to charge the issue to?

[Work Order](#)
[Material Request](#)
[Equipment](#)
[Location](#)
[GL Account](#)

[Logout](#) [Main Menu](#)

2. From the Select Charge Type screen, tap on GL Account.

Storeroom: CENTRAL

Enter *GL Account*:

[Logout](#) [Issues Main](#)

3. Enter a GL account in the GL Account field and tap on find.
4. If the GL account is recognized as valid, the Issue Item screen is displayed.

If the GL Account is invalid, a message is displayed. Tap on OK to return to the GL Account field and enter a valid GL account.

Storeroom: CENTRAL

GL Account: 6600-800-800

Item:

Bin:

Quantity:

Issues Main

5. At the Issue Item screen, enter an item, bin, and quantity for that GL account.
6. Tap on Issue to issue the item. The Issue Item screen is redisplayed. Each of the fields is ready for the next item to be issued.
7. Tap on Issues Main to return to the Select Charge Type screen.

CHAPTER 5 PHYSICAL COUNT

The Physical Count option is used for updating the inventory physical count you have on hand and comparing it with the balances you have in MAXIMO.

These counts may be done either by bins (page 37) or by item number (page 39).

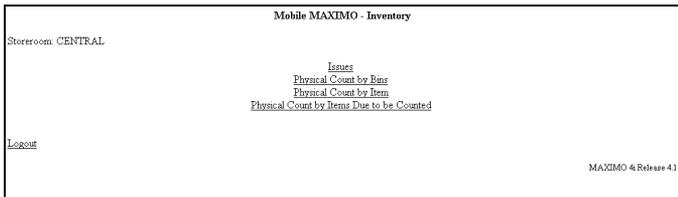
NOTE: *When creating your bin numbering system, it may be easier to use your bar code scanner if the bins are created in logical sequence. This allows a person with a handheld device to go through them in order.*

Physical Count by Bins

The Physical Count by Bins option updates your physical count with the balances in MAXIMO on a bin by bin basis.

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

Entering a New Quantity



Mobile MAXIMO - Inventory

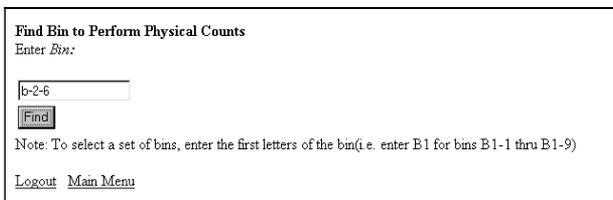
Storeroom: CENTRAL

[Issues](#)
[Physical Count by Bins](#)
[Physical Count by Item](#)
[Physical Count by Items Due to be Counted](#)

[Logout](#)

MAXIMO 4: Release 4.1

1. From the Mobile MAXIMO - Inventory screen, tap on Physical Count by Bins.



Find Bin to Perform Physical Counts

Enter Bin:

Note: To select a set of bins, enter the first letters of the bin(i.e. enter B1 for bins B1-1 thru B1-9)

[Logout](#) [Main Menu](#)

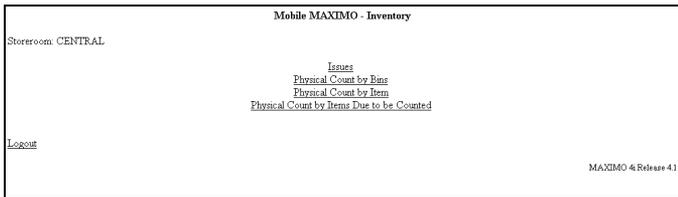
2. The Find Bin to Perform Physical Counts screen is displayed. Enter a bin number in the Bin field and tap on Find.

Physical Count by Item

The Physical Count by Item option updates your physical count with the balances in MAXIMO on an item by item basis.

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

Finding an Item



The screenshot shows the 'Mobile MAXIMO - Inventory' screen. At the top left, it says 'Storeroom: CENTRAL'. In the center, there are four menu options: 'Issues', 'Physical Count by Item', 'Physical Count by Item', and 'Physical Count by Items Due to be Counted'. At the bottom left, there is a 'Logout' link. At the bottom right, it says 'MAXIMO 4: Release 4.1'.

1. From the Mobile MAXIMO - Inventory screen, tap on Physical Count by Item.

Find Item to Perform Physical Counts
Enter *Item*:

[Logout](#) [Main Menu](#)

2. The Find Item to Perform Physical Counts screen is displayed. Enter a specific item number and tap on Find.

If a specific item number is not entered, a message is displayed that the item does not exist in inventory. Tap OK and repeat this step.

Enter Physical Counts

Item 1 of 1

Storeroom CENTRAL

Bin: B-2-6

Item: 251111

Lot:

Last Known Balance: 2.0

New Quantity:

[Main Menu](#)

3. Tap on Skip to go on to the next item or enter a new quantity in the New Quantity field and tap on either of the following:
 - Save - Change the physical count with a time-stamp and wait for the next reconciliation to update the current balance.
 - Save/Reconcile – Save and immediately reconcile the current balance with the new physical count.
4. The Find Item to Perform Physical Counts screen is redisplayed. The item field is ready to accept the next item.

CHAPTER 6 PHYSICAL COUNT BY ITEMS DUE TO BE COUNTED

This section describes the Physical Counts by Items Due to be Counted option.

NOTE: *All fields requesting your input in this section may be scanned electronically using the bar code reader attached to your PDA device. Your PDA must support the HTML tags/attributes defined in the table on page 7 to utilize the bar code functionality.*

Physical Count by Items Due to be Counted

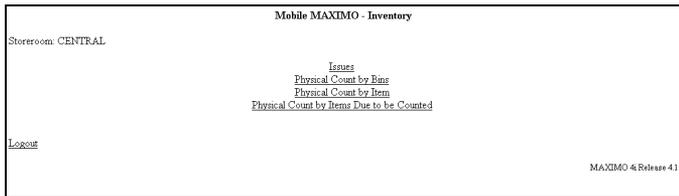
The Physical Counts by Items Due to be Counted option allows you to view items that are to be counted on a regular basis. These items are determined by the inventory control function in MAXIMO.

Mobile MAXIMO - Inventory tracks the Last Count Date for all items in your storeroom and adds the number of days in each item's Cycle Count Frequency.

If the Last Count Date plus Cycle Count Frequency is:

- A date earlier than or equal to the system date, the item is displayed in this application.
- A date later than the system date, the item is not displayed in this application.

Displaying Items



1. From the Mobile MAXIMO - Inventory screen, tap on Physical Counts by Items Due to be Counted.

Enter Physical Counts

Item 1 of 66

Storeroom CENTRAL

Bin: A-3-4

Item: 251105

Lot:

Last Known Balance: 5.0

New Quantity:

[Main Menu](#)

2. The Enter Physical Counts screen is displayed. You may scroll through all items that are due to be counted on today's date.
3. Tap on Skip to view the next item due to be counted or enter a new quantity in the New Quantity field.

The following options are available:

- Save - Change the physical count with a time-stamp and wait for the next reconciliation to update the current balance.
 - Save/Reconcile – Save and immediately reconcile the current balance with the new physical count.
4. After scrolling through the last item to be counted, tap on Main Menu to return to the Mobile MAXIMO - Inventory screen.

