

CHANGE REQUEST

Change Request #	CR0463 – Automated QA Lot Transfers
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Description of Change

Description of Need:

QA needs to transfer inventory between sites to indicate the material is “released” upon QA approval. Currently QA is using a report to identify when Lots of inventory are ready to be transferred into released inventory bins, but this process requires that the entire lot quantity is ready to be transferred.

Once a Lot of an item is released by QA, the moment it hits a staging bin (it can be transferred immediately to a released sites (either in MFGIL for raw materials, or DCIL for finished goods).

ACME Co. needs to be able to specify “released” lots, and have the system automatically transfer the inventory into released once it hits one of the staging bins.

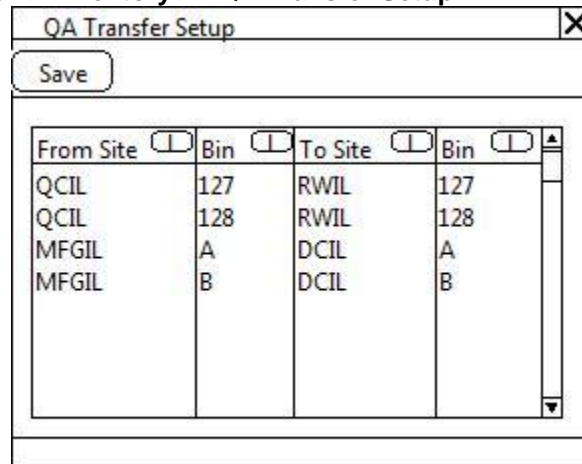
Description of Solution:

QA Transfer Setup

The QA Lot Transfer utility will “watch” a specified set of Bins for the presence of “released” inventory. If it finds released inventory, it will automatically transfer it to a destination site.

ACME’s current implementation uses a “to BIN” that matches the “from BIN”. While the software could assume that it could always transfer from bin A in MFGIL to bin A in DCIL, this would “hard-code” that implementation decision into the software. The proposed setup window (below) provides a way to “map” From and To bins, so that should the need arise, multiple FROM bins could be mapped to a single TO bin, or to a TO Bin that does not match the From Bin.

Navigation: Tools >> Setup >> Inventory >> QA Transfer Setup



From Site	Bin	To Site	Bin
QCIL	127	RWIL	127
QCIL	128	RWIL	128
MFGIL	A	DCIL	A
MFGIL	B	DCIL	B

 = Lookup Button

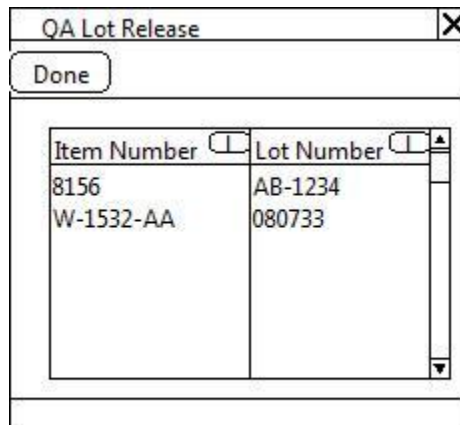
The From Bins are monitored by the QA Transfer Utility for the presence of “released” inventory. If any exists, the utility will create an inventory transfer to move the inventory out of the From Bin into the To Bin. Although this is not the intent of the software, the From and To Sites could be the same, and the system would create a bin-to-bin transfer using the mapping. The window will not allow a Site-Bin to be mapped to

itself.

Field	Function
Site (From and To)	User enters a site, or selects one from the Lookup.
Bin (From and To)	User enters a bin, or selects one from the Lookup.

QA Lot Release

Navigation: Tools >> Setup >> Inventory >> QA Transfer Setup



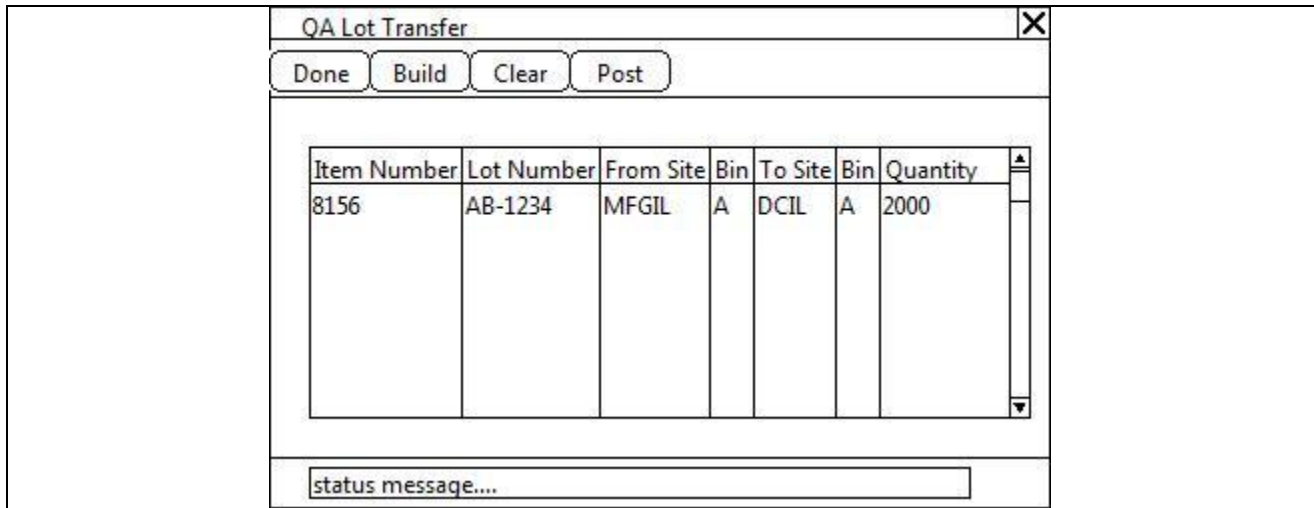
 = Lookup Button

The QA Lot Release window is used to record Item-Lot Numbers that have been released by QA. The QA Transfer Utility will look for this inventory in the "From Bins" specified in Setup. Security can be set on this window so that only authorized QA Users can access it.

Field	Function
Item Number	User enters an Item Number, or selects one from the Lookup
Lot Number	User enters a Lot Number, or selects one from the Lookup. The Lookup shows all lot numbers for the Item which have inventory in the system.
	Rows can be removed from the window, if needed, via Edit >> Delete Row

QA Lot Transfer

Navigation: Tools >> Setup >> Inventory >> QA Transfer Setup



The QA Lot Transfer window automatically builds and posts and inventory transfer for all QA Released lots in one of the “From Bins” specified in Setup.

When the window opens it will be empty. The use will click the BUILD button.

The BUILD process looks for any released inventory in any of the “From Bins” specified in Setup. If it finds any inventory, it will be added to this window.

Items will NOT be added if the mapped To Site/Bin are not valid for the item (i.e. if the item is not assigned to the To Site/Bin). Such items will simply be skipped. There are no warnings or error reports.

In the background the Build process will allocate the inventory in the From Site/Bin, and add the item/lot to an Inventory Transfer Transaction. This will be a regular inventory transfer, as-if it had been created in the Item Transfer window. In the event of a system failure during the Build process, the partially created transaction can be edited/fixed/deleted using the Item Transfer window.

While the BUILD process runs the Status Message field will display information about the item/lots being added to the transfer.

When the BUILD process is complete, the scrolling window will display the transfer. This window is not editable, but individual rows can be removed from the window via Edit >> Delete Row. Deleting a row will unallocated the inventory in the From Site/Bin, and remove it from the window.

CLEAR will remove all rows from the window. This has the same effect as deleting an un-posted inventory transfer. All affected tables will be cleared, and all inventory will be unallocated.

Closing the window will run the CLEAR button, so if there is an un-posted transfer, it will be deleted.

Clicking POST will post the inventory transfer. The transfer will be posted at the Batch level so that should posting hang, Batch Recovery could be used to recover the transaction, fix any errors, and manually re-post. The Batch ID for the transaction will be built using:

- QATRF + YYMMDD + HHMM

Posting journals will print (or not) based on the system posting settings for Inventory Transactions.

When posting is complete, the window will clear.

