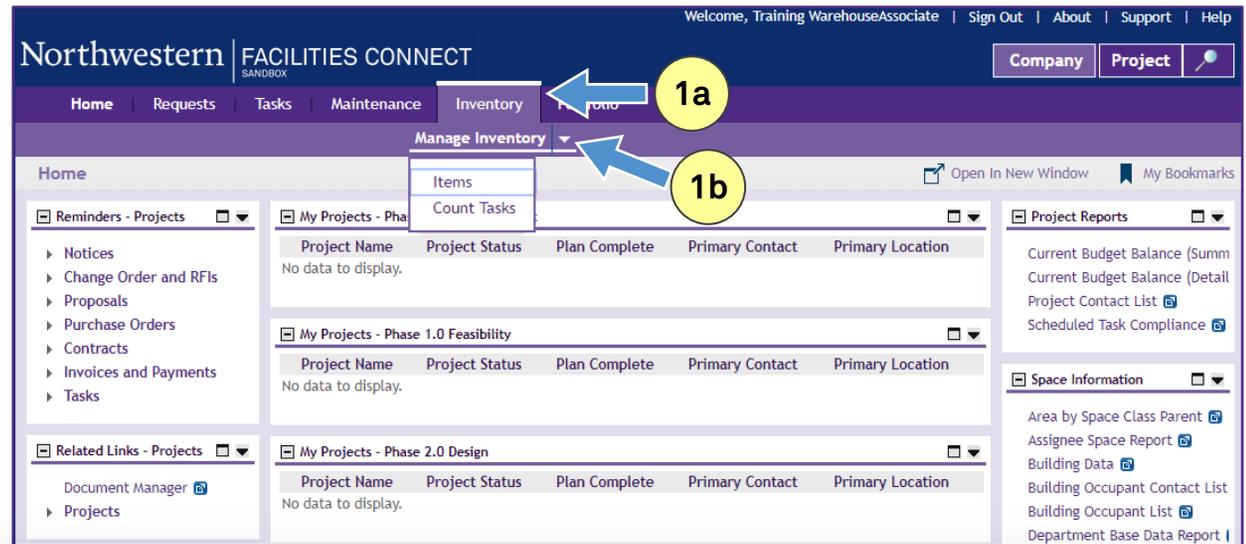




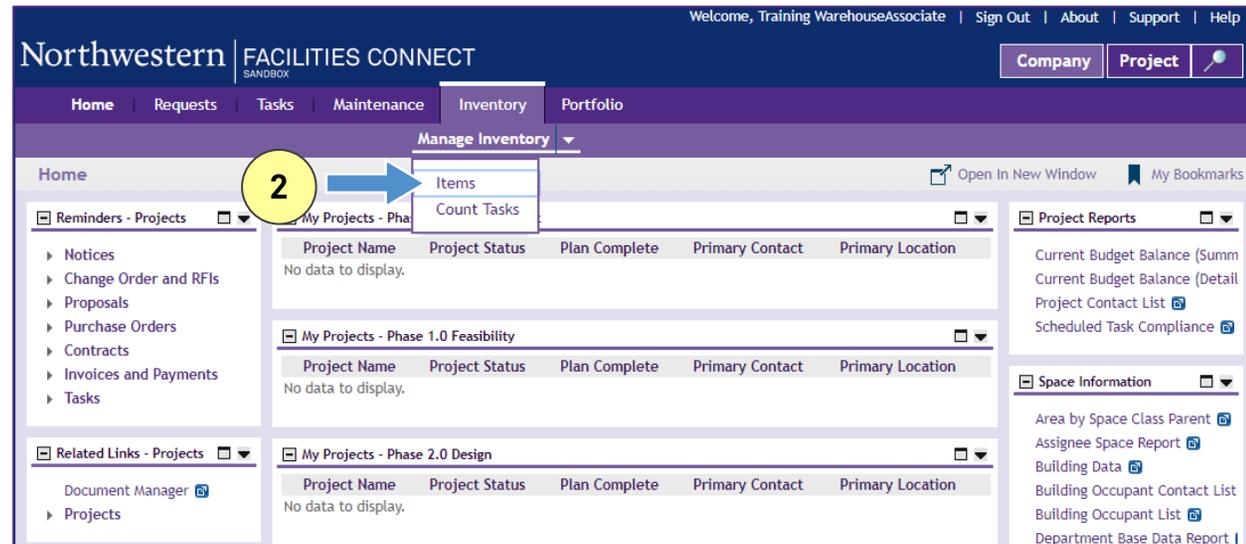
Manage Adjustments

PURPOSE: Use this job aid to learn how to manage adjustments to inventory items

- 1 From the Facilities Connect Home Screen, hover your cursor over **1a** Inventory and click on: **1b** Manage Inventory drop-down arrow



- 2 From the Manage Inventory drop-down menu click on: **2** Items



For more information, visit the Facilities Connect website at www.northwestern.edu/fm/connect

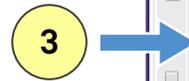


Manage Adjustments

PURPOSE: Use this job aid to learn how to manage adjustments to inventory items

3 All inventory items display. Find the item that you want to adjust. You can filter the display by entering a partial or full **Item ID** or entering a partial or full word in any of the column "Contains" text boxes and pressing Enter.

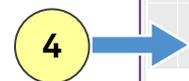
3



Item Name	Item ID	Spec Name	Spec ID	ABC Class	Service Class	Primary Location	Storage Area	Quantity On Hand	Quantity Safety Stock	Quantity Available	Status
10" hammer	INVITEM1067511			A Class	Inventory	TECH	000-0000	1 each	1 each	0 each	Active
9" Hammer	INVITEM1067510					CHCENTRAL	0000-0	0 each	0 each	0 each	In Progress
P000005 - TECH: FILTER, WATER WHOLE HOUSE 12 IN L 5GPM Mfr Part# 73R20A	P000005 - TECH	P000005 FILTER, WATER WHOLE HOUSE 12 IN L 5GPM Mfr Part# 73R20A	P000005	A Class	Inventory	TECH	A302-2	9 each	0 each	9 each	In Progress

4 Click the name of the item that you want to adjust.

4



Item Name	Item ID	Spec Name	Spec ID	ABC Class	Service Class	Primary Location	Storage Area	Quantity On Hand	Quantity Safety Stock	Quantity Available	Status
HAMMER	Contains	Contains	Contains	Contain	Contains	Contains	Contains	More Than	More Than	More Than	Contains
10" hammer	INVITEM1067511			A Class	Inventory	TECH	000-0000	1 each	1 each	0 each	Active
9" Hammer	INVITEM1067510					CHCENTRAL	0000-0	0 each	0 each	0 each	In Progress

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Manage Adjustments

PURPOSE: Use this job aid to learn how to manage adjustments to inventory items

5 The Inventory Item window opens.
Click on:

5 Revise

Inventory Item: INVITEM 1067511

General Contacts Notifications Notes & Documents History

(Required): General Details Required for Inventory Item.

General

ID INVITEM 1067511 Status Active

* Name 10" hammer

Description

Units

* Quantity each * Currency US Dollars

Specification (Stock Item)

ID

Spec Name

Spec Class

Total Cost 5.00

6 Scroll down to the Adjustments section (bottom right). Click on:

Adjustment **6**

Inventory Purchasing Details

Purchasing Reorder Logic ROP Stock Category Stocked

U. Purchasing Reorder Point (ROP) 12 Economic Order Quantity (EOQ) 0 EOQ Units Quantity each

V. Reorder Logic Calculation (T+Q) 0

W. Reorder Logic - Reorder Point (V-U) -12 Requested ROP Delivery Duration 0

Inventory Summary

Q. Quantity On Order 0 S. Total On Hand (R-H+P)

R. Quantity Received 0 T. Total Available (S-D)

Unit Price 5.00 US Dollars Estimated Stock Value On Hand

Hold or Pending Issue Hold **Issued or Returned** Issue **Adjustments** Adjustment Transfer

A. Quantity Hold	0	E. Quantity Issued	0	I. Quantity Adj by Count	0
B. Quantity Back Ordered	0	F. Quantity On Loan	0	J. Quantity Transferred In	0
C. Quantity Safety Stock	1	G. Quantity Returned	1	K. Quantity Transferred Out	0
D. Total Pending Issue (A+B+C)	1	H. Total Issued (E+F-G)	-1	L. Quantity Lost	0
				M. Quantity Retired	0
				N. Quantity Under Repair	0
				O. Quantity Damaged	0
				P. Total Adjustments (I+J-K-L-M-N-O)	0

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Manage Adjustments

PURPOSE: Use this job aid to learn how to manage adjustments to inventory items

7 The Inventory Item window opens. Choose **Transaction Type** from the list, Enter **Quantity to be posted**, then click **Post** on the Right top corner

7

Additional Reference Note for Transaction Type to use:

- Inventory Return:** To adjust return item
- Inventory Lost:** For items taken away
- Inventory Damaged:** To report damaged Inventory quantity
- Inventory Cycle Count:** For Cycle count related adjustment only
- Inventory Repair:** Currently use it only for UOM conversion
- Inventory Retire**

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Manage Adjustments

PURPOSE: Use this job aid to learn how to manage adjustments to inventory items

8

Click on the **History** Tab to check The adjustment entered is Correct and status display as **Posted**

Inventory Item: INVITEM 1014427 - Google Chrome

northwestern-qa.tririga.com/WebProcess.srv?objectId=750000&actionId=750011&propertyId=208133&projectId=1&specClassType=20006&specId=33044292&specTypeId=10002272&action=Edit&managerType=query&altGuiListId=-1&inline=false

Inventory Item: INVITEM 1014427 Add To Bookmarks

General Contacts Notifications Notes & Documents **History** Activate Save Save & Close

(Summary): Inventory Items Transaction History.

Transaction Log

[Export](#) 18 total found [Apply Filters](#) [Clear Filters](#)

Transaction ID	Type	Date	Quantity	Unit Price	Total Cost	Status
1022996	Inventory Damaged	02/12/2020 14:33:45	1 each	\$81.36	\$81.36	Posted
1022973	Inventory Issue	01/31/2020 17:13:56	1 each	\$81.36	\$81.36	Posted
1022971	Inventory Issue	01/31/2020 17:08:31	1 each	\$81.36	\$81.36	Posted
1022970	Inventory Issue	01/31/2020 17:03:37	1 each	\$81.36	\$81.36	Posted
1022968	Inventory Issue	01/31/2020 16:55:05	0 each	\$81.36	\$0.00	Active
1022963		01/31/2020 16:04:02	0 each	\$81.36	\$0.00	Active
1022962		01/31/2020 16:02:26	0 each	\$81.36	\$0.00	Active
1022951	Inventory Issue	01/30/2020 13:53:49	21 each	\$81.36	\$1,708.56	Posted
1022736	Inventory Transfer Out	01/21/2020 10:24:49	1 each	\$81.36	\$81.36	Posted

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