

InventoryControl Web User Manual



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Welcome

Welcome to InventoryControl Web. Below is a list of the available help topics:

[Logging In](#)

[Home Page](#)

[Manage Filters Page](#)

[Working with Lists](#)

[Inventory List Example](#)

[Item List Example](#)

[Pick Order List Example](#)

[Purchase Order List Example](#)

[Transaction List Example](#)

Logging In

After entering the URL of InventoryControl Web you will be presented with the **Login** page.

1. The **Login** page of the InventoryControl Web application is where you will enter your user name and password. An example of this page is shown below:



2. Enter your **User Name** and **Password**, then click the **Login** button. The **User Name** and **Password** are the same as your InventoryControl User Name and Password (set on the **Security Privileges > Add/Edit Employee** screen in InventoryControl).

Click the **Help** link to access this help file.

The **Home** page will appear. Please refer to the topic [Home Page](#) for more information on this page.

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Home Page

The Home Page displays all current alerts in InventoryControl. This information is pulled directly from your InventoryControl database. One or more of these alerts will appear with a number in the **Count** column if any of the alerts exist in InventoryControl. You can view a list by clicking on the link.

The alerts include:

Items Understocked (By Location) - This list displays all items that are below their minimum stock levels grouped by location. The Minimum Stock Level can be entered on the **New/Edit Item** screen > **Location** tab.

Items Understocked (By Item) - This list displays all items that are below their minimum stock levels grouped by item. The Minimum Stock Level can be entered on the **New/Edit Item** screen > **Location** tab.


Checked Out Items Past Due - This list displays all checked out items that are past their due (check in) date.

Pick Orders Past Due - This list displays all Pick Orders that have passed their due date.

Items with Expired Date Code - This list displays all Items with Expired Date Codes. Date Code is one of the tracking field options available on the **New/Edit Item** screen. Please note that this list will only appear if you have enabled the Enforce Datecode option on the InventoryControl software **Options** screen.

Items with Negative Quantity - This list displays all items with negative quantity.

Below is an example of the **Home Page**. Notice that items that appear underlined are links and contain Counts. Click on the link to view the list of items. For example, in the image below, there is one item Understocked by Location. The user can click on the **Items Understocked by Location** link to view the understocked item.



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User Admin is logged in | [Logout](#) |

[Home](#) [Search](#) [Help](#)

Click the links below to view alerts.

Description	Count
Items Understocked By Location	1
Items Understocked By Item Totals	1
Checked Out Items Past Due	0
Purchase Orders Past Due	0
Pick Orders Past Due	0
Items With Negative Quantity	1

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Below is an example of the **Items Understocked by Location** list:

Items Understocked By Location						
Item Number	Item Description	Site	Location	Quantity	Max Stock Level	Min Stock Level
3003	Quake	A	1001	-20.0000	0.0000	0.00
<div> <div>Back</div> <div>Export</div> </div>						

After viewing the list, you can export it to a .csv file by clicking the **Export** button, or click **Back** to return to the Home Page.

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Manage Filters Page

InventoryControl Web allows you to set filters on your lists so you can view the displayed information as needed. You can save these filters for each list so you can apply them as needed.

Using the Manage Filters Page:

1. There are two ways to access the **Manage Filters** screen:
 - a. If you have a saved filter for the list you are trying to access (Transaction, Inventory, etc.) you will be taken to the **Manage Filter** page first. Click **Search** then the **Manage Filter** page appears.



- b. You can select the **Manage Filter** button on any **List** page.



Below is an example of the **Manage Filters** page:

[Don't filter. Just show me the full list.](#)

My Saved Filters

	Filter Name	Filter Criteria	Created On	Last Updated On	Default?	Global?
X	Inventory List Filter	None	1/28/2009 5:33:00 PM	1/28/2009 5:33:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Pre-defined Filters

	Filter Name	Filter Criteria	Created On	Last Updated On	Default?
	sz Inventory filter columns reordered & smaller only - Global only	None	1/16/2009 1:07:13 PM	1/16/2009 1:07:13 PM	

2. In the **My Saved Filters** section you will see any filters you have created and saved on the search pages. If the filter is marked **Default**, this is the default filter for the indicated list. If the

filter is marked **Global**, all users who login to InventoryControl Web can see and use this filter.

You can:

Access the List screen using the filter by clicking the **Magnifying Glass** icon.

	Filter Name	Filter Crite
 	Inventory List Filter	None

Access the List screen with no filter by clicking the **Don't filter. Just show me the full list.** link.

Don't filter. Just show me the full list.	
My Saved Filters	
	Filter Name

Deleting Filters:

1. Access the **Manage Filters** page using one of the methods described above.
2. Click the **X** icon next to the filter you want to delete.

	Filter Name	Filter Crite
 	Inventory List Filter	None

The following message screen will appear:



3. Click **OK** on the message screen.

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Lists Examples

Viewing Inventory

InventoryControl Web allows you to view your current list of Inventory. This list can be filtered as needed. For detailed information on setting filters, saving, etc., please refer to the [Working with Lists](#) topic.

Accessing the Inventory List Page:

- To view your current inventory, click **Lists > Inventory**. If you currently have a filter set for the Inventory page, you will first be taken to the [Manage Filters page](#). Below is an example of the **Inventory List** page.

You are viewing the inventory list.
The list is not filtered.

Show Filter Row	Select Columns	Hide Selected Columns	Show Hidden Columns	Export	Save Filter	Manage Filters
-----------------	----------------	-----------------------	---------------------	--------	-------------	----------------

Item Number	Item Description	Site	Location	Quantity	Oldest Date Ac	Latest Date Ac	Pallet	Lot
3001	EverQuest	A	1001	100.00	1/1/1900	1/1/1900		1
3002	Doom	B	2001	200.00	1/1/1900	1/1/1900		
3003	Quake	A	1001	-20.00	1/1/1900	1/1/1900	2	
3004	HalfLife	A	1001	50.00	1/1/1900	1/1/1900		
3004	HalfLife	A	1002	0.00	1/1/1900	1/1/1900		

Notice that if the list is not filtered, the page will state "**The list is not filtered**". If you are viewing the list with a filter, the filter name will appear here.

If the list contains multiple pages, you can select a page number to view using the drop down menu in the **Page** field. The total number of pages also appears here. For example, in the example below, we are viewing page 1 of 4.

Page: 1 / 4
Lot

Be aware that you may need to scroll to see all of the columns in the list. To scroll, use the bar at the bottom of the list.

Note: If the list is too wide to view all at once on your screen, you can hide unwanted columns by following the instructions in the [Hiding Selected Columns](#) section in the [Working with Lists](#) topic.

103	103 serial	1	1	1.00
<div style="border: 1px solid red; padding: 2px;"> <div style="background-color: #e0e0ff; border: 1px solid #ccc; width: 100%; height: 20px; position: relative;"> < > </div> </div>				

- You can set **Filters** for the list as needed.

Viewing Items

InventoryControl Web allows you to view your current list of items. This list can be filtered as needed. For detailed information on setting filters, saving, etc., please refer to the [Working with Lists](#) topic.

Accessing the Item List Page:

- To view your current items, click **Lists > Item**. If you currently have a filter set for the Items List page, you will first be taken to the [Manage Filters page](#). Below is an example of the **Item List** page.

You are viewing the item list.

The list is not filtered.

Show Filter Row

Select Columns

Hide Selected Columns

Show Hidden Columns

Export

Save Filter

Manage Filters

Type	Item Number	Description	Total Available	Total Checked	Total In-House	On Order	Committed	Cost
Inventory	3000	Timeline	0.00	0.00	0.00			
Inventory	3001	EverQuest	100.00	50.00	50.00			
Inventory	3002	Doom	200.00	50.00	150.00			
Inventory	3003	Quake	-20.00	50.00	-70.00			
Inventory	3004	HalfLife	50.00	50.00	0.00			
Inventory	3005	Panzer	0.00	0.00	0.00			
Inventory	3006	Myth	0.00	0.00	0.00			
Inventory	3007	Sims	0.00	0.00	0.00			
Inventory	3008	Anarchy	0.00	0.00	0.00			
Inventory	3009	Tycoon	0.00	0.00	0.00			
Inventory	3010	Zelda	0.00	0.00	0.00			

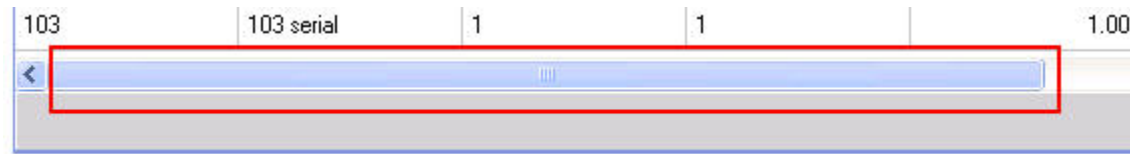
Notice that if the list is not filtered, the page will state "**The list is not filtered**". If you are viewing the list with a filter, the filter name will appear here.

If the list contains multiple pages, you can select a page number to view using the drop down menu in the **Page** field. The total number of pages also appears here. For example, in the example below, we are viewing page 1 of 4.



Be aware that you may need to scroll to see all of the columns in the list. To scroll, use the bar at the bottom of the list.

Note: If the list is too wide to view all at once on your screen, you can hide unwanted columns by following the instructions in the [Hiding Selected Columns](#) section in the [Working with Lists](#) topic.



2. You can set **Filters** for the list as needed.

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Viewing Pick Orders

InventoryControl Web allows you to view your current list of Pick Orders. This list can be filtered as needed.

For detailed information on setting filters, saving, etc., please refer to the [Working with Lists](#) topic.

Accessing the Pick Orders List Page:

1. To view Pick Orders, click **Lists > Pick Orders**. If you currently have a filter set for the Pick Orders List page, you will first be taken to the [Manage Filters page](#). Below is an example of the **Pick Orders List** page.

You are viewing the pick order list.
The list is not filtered.

Show Filter Row

Select Columns

Hide Selected Columns

Show Hidden Columns

Export

Save Filter

Manage Filters

Past Due	Due Date	Order Number	Status	Order Date	Reference No.	Customer No.	Customer Name	Ship Via	
		1	In Process	1/9/2009		CUST 01029	Jeffery Cusack		1/15/2009
		2	New	1/15/2009		1	Jack Miller		
	1/13/2009	00001	In Process	1/13/2009	pick ref #20	CUST 01029	Jeffery Cusack	USPS - Postal Service	1/13/2009
	1/14/2009	00002	New	1/14/2009	New Pick order	1	Jack Miller	DHL	
	1/14/2009	00003	New	1/14/2009	New pick order to mak	1	Jack Miller	UPS	
	1/14/2009	00004	New	1/14/2009	New pick order to mak	1	Jack Miller	USPS - Postal Service	
			New	1/14/2009			Jack Miller	USPS - Postal Service	

Notice that if the list is not filtered, the page will state "**The list is not filtered**". If you are viewing the list with a filter, the filter name will appear here.

If the list contains multiple pages, you can select a page number to view using the drop down menu in the **Page** field. The total number of pages also appears here. For example, in the example below, we are viewing page 1 of 4.

Page: 1 / 4

Lot

Be aware that you may need to scroll to see all of the columns in the list. To scroll, use the bar at the bottom of the list.

Note: If the list is too wide to view all at once on your screen, you can hide unwanted columns by following the instructions in the [Hiding Selected Columns](#) section in the [Working with Lists](#) topic.

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2. You can set **Filters** for the list as needed.

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Viewing Purchase Orders

InventoryControl Web allows you to view your current list of Purchase Orders. This list can be filtered as needed. For detailed information on setting filters, saving, etc., please refer to the [Working with Lists](#) topic.

Accessing the Purchase Orders List Page:

1. To view Purchase Orders, click **Lists > Purchase Orders**. If you currently have a filter set for the **Purchase Orders List** page, you will first be taken to the [Manage Filters page](#). Below is an example of the **Purchase Orders List** page.

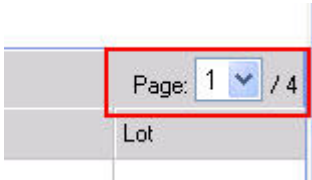
You are viewing the purchase order list.
The list is not filtered.

Show Filter Row	Select Columns	Hide Selected Columns	Show Hidden Columns	Export	Save Filter	Manage Filters
-----------------	----------------	-----------------------	---------------------	--------	-------------	----------------

Past Due	Due Date	Type	PO Number	Status	Order Date	Reference Number	Supplier No.	Supplier	
		PO	1	New	1/15/2009		1	Supplier	
	1/13/2009	PO	00001	In Process	1/13/2009	ref	1	Supplier	Other -
	1/14/2009	PO	00002	In Process	1/14/2009	ref New purch orde	2	Supplier 2	UPS
	1/14/2009	PO	00003	New	1/14/2009	ref Num on Purch orde	2	Supplier 2	DK
	1/14/2009	PO	00004	New	1/14/2009	ref Num on Purch orde	2	Supplier 2	
	1/14/2009	PO	00005	In Process	1/14/2009	ref Num on Purch orde	2	Supplier 2	
			00006	New				Supplier 2	

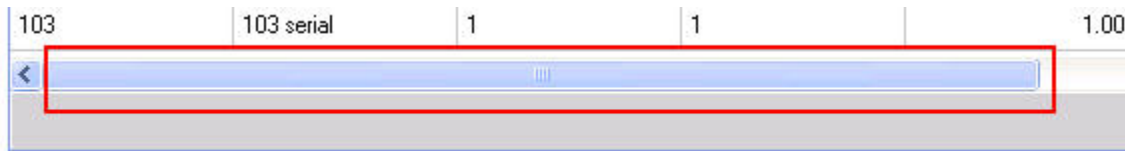
Notice that if the list is not filtered, the page will state "**The list is not filtered**". If you are viewing the list with a filter, the filter name will appear here.

If the list contains multiple pages, you can select a page number to view using the drop down menu in the **Page** field. The total number of pages also appears here. For example, in the example below, we are viewing page 1 of 4.



Be aware that you may need to scroll to see all of the columns in the list. To scroll, use the bar at the bottom of the list.

Note: If the list is too wide to view all at once on your screen, you can hide unwanted columns by following the instructions in the [Hiding Selected Columns](#) section in the [Working with Lists](#) topic.



- 2. You can set **Filters** for the list as needed.

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Viewing Transactions

InventoryControl Web allows you to view your current list of Transactions. This list can be filtered as needed.

For detailed information on setting filters, saving, etc., please refer to the [Working with Lists](#) topic.

Accessing the Transaction List Page:

1. To view transactions, click **Lists > Transaction**. If you currently have a filter set for the **Transaction List** page, you will first be taken to the [Manage Filters page](#). Below is an example of the **Transaction List** page.

You are viewing the transaction list.
The current filter applied is: Trans Type Group.

Show Filter Row

Select Columns

Hide Selected Columns

Show Hidden Columns

Export

Save Filter

Manage Filters

Trans Date	Trans Type	Item Number	Item Description	Entry Date	Quantity	Date Acquired	Due Date	Cost
9/5/2008	Move	3007	Sims	9/5/2008	100.00			
9/5/2008	Check Out	3004	HalfLife	9/5/2008	50.00			
9/5/2008	Adjust Out	3003	Quake	9/5/2008	200.00			
9/5/2008	Check Out	3003	Quake	9/5/2008	50.00			
9/5/2008	Move	3002	Doom	9/5/2008	200.00			
9/5/2008	Check Out	3002	Doom	9/5/2008	50.00			
9/5/2008	Check Out	3001	EverQuest	9/5/2008	50.00			
1/1/1900	Add	3001	EverQuest	9/5/2008	100.00	1/1/1900		
1/1/1900	Add	3002	Doom	9/5/2008	100.00	1/1/1900		2
1/1/1900	Add	3003	Quake	9/5/2008	100.00	1/1/1900		
1/1/1900	Add	3004	HalfLife	9/5/2008	100.00	1/1/1900		1
1/1/1900	Add	3001	EverQuest	9/5/2008	200.00	1/1/1900		
			Doom	9/5/2008				

Notice that if the list is not filtered, the page will state "**The list is not filtered**". If you are viewing the list with a filter, the filter name will appear here.

If the list contains multiple pages, you can select a page number to view using the drop down menu in the **Page** field. The total number of pages also appears here. For example, in the example below, we are viewing page 1 of 4.

Page: 1 / 4

Lot

Be aware that you may need to scroll to see all of the columns in the list. To scroll, use the bar at the bottom of the list.

Note: If the list is too wide to view all at once on your screen, you can hide unwanted columns by following the instructions in the [Hiding Selected Columns](#) section in the [Working with Lists](#) topic.

103	103 serial	1	1	1.00
<div><div><</div><div></div></div>				

2. You can set **Filters** for the list as needed.

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Working with Lists

Much of the information on InventoryControl Web is displayed in List format. You can manipulate the data in these lists in several ways that allow you to customize how the information is viewed. This topic provides an overview on how the lists work and contain instructions on sorting, filtering and arranging the data in the lists.

The following topics are discussed in this section:

[Sorting Columns](#)

[Hiding Selected Columns](#)

[Showing Hidden Columns](#)

[Creating a Filter](#)

[Exporting the List](#)

[Saving List Settings](#)

Below is an example of the **Inventory List**. You can view an example of each list by clicking on the List Example topics.

You are viewing the inventory list.
The list is not filtered.

Show Filter Row	Select Columns	Hide Selected Columns	Show Hidden Columns	Export	Save Filter	Manage Filters
-----------------	----------------	-----------------------	---------------------	--------	-------------	----------------

Item Number	Item Description	Site	Location	Quantity	Oldest Date Ac	Latest Date Ac	Pallet	Lot
3001	EverQuest	A	1001	100.00	1/1/1900	1/1/1900		1
3002	Doom	B	2001	200.00	1/1/1900	1/1/1900		
3003	Quake	A	1001	-20.00	1/1/1900	1/1/1900	2	
3004	HalfLife	A	1001	50.00	1/1/1900	1/1/1900		
3004	HalfLife	A	1002	0.00	1/1/1900	1/1/1900		

Sorting Columns:

Most of the columns that appear in the lists can be sorted ascending or descending. The columns sort ascending by default. To change the sort order, click on the column heading. An arrow will appear next to the column name to let you know in which direction the information is sorted. The example below shows the **Oldest Date Acquired** column sorted Descending.

Oldest Date Acquired ▼
2/4/2009
2/2/2009
1/21/2009
1/21/2009
1/21/2009
1/21/2009
1/21/2009
1/21/2009
1/20/2009
1/20/2009
1/20/2009

Creating a Filter:

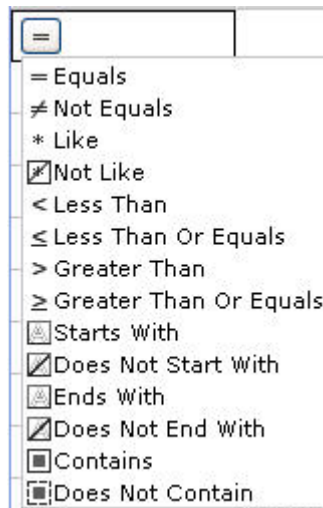
- 1. Click the **Set Filter** button.



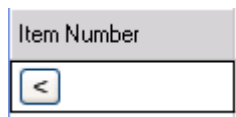
The column names will appear with an **Equals** sign icon (=) as shown in the example below:

Item Number	Item Description	Site	Location	Quantity
=	=	=	=	=

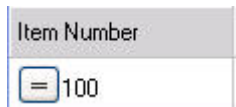
- Click on the **Equals** sign to display the complete list of available filters.



- Select a filter from the list. It will now appear in the column header.



- Type in the value you want to filter. To fill in the value, click the cell of the filter just to the right of the operator. A cursor will appear allowing you to type in a value. In the example below, we have set the **Item Number** filter to **Equals 100**.



You can filter as many columns as needed.

- To remove the **Filter**, click the **Remove Filter** button.

Hiding Selected Columns:

You can hide columns that contain information you do not usually need. When you hide a column, it will remain hidden until you manually return it to the List screen by following the instructions in the **Show Hidden Columns** section. To Hide Columns:

- Select the **Select Columns** button.



This enables the **Hide/Show Columns** buttons and allows you to select columns to be hidden.

Note: Notice that the button now changes to say **Sort Columns**. Click **Sort Columns** to disable the Hide/Show buttons and enable the sort feature.

2. Select the columns you want to hide by clicking on the column names. To select multiple columns, hold down the **Ctrl** key while you are clicking on the column names. Selected columns will appear italicized.

<i>Quantity</i>	<i>Oldest Date Acquired</i>
13.00	1/13/2009
-1.00	
14.00	1/14/2009
54.00	1/13/2009
3.00	1/13/2009
6.00	1/14/2009
0.50	
91.00	1/19/2009
1.00	

3. Click the **Hide Selected Columns** button.



The screen will now hide the selected columns.

Show Hidden Columns:

To show columns you have hidden:

1. Select the **Select Columns** button.



This enables the **Hide/Show Columns** buttons.

Note: Notice that the button now changes to say **Sort Columns**. Click **Sort Columns** to disable the Hide/Show buttons and enable the sort feature.

2. Select the **Show Hidden Columns** button.

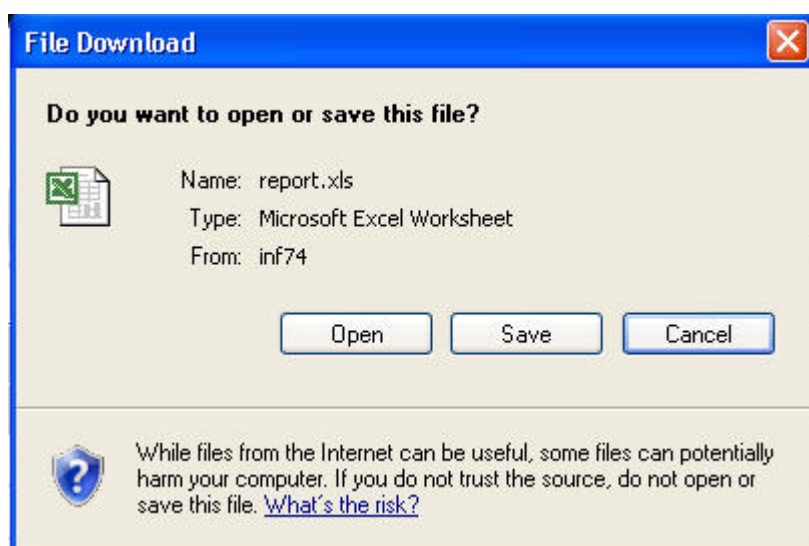


The screen will now display any hidden columns.

Exporting the List:

Export allows you to export the entire list as an Excel® Worksheet. To Export:

1. When the **Export** button is selected, a screen appears allowing you to specify where the exported data will be saved on your computer. An example of the **Export** screen is shown below:



2. Click **Open** to open the .xls worksheet or **Save** to save it to your computer. Make sure you save this to a location you can remember. If you click **Save**, you must also choose a name for your file.
-

Saving List Settings:

You can save your filters and hidden column settings so that each time you view the list, the information is arranged and displayed as you want it.

1. Click the **Save Settings** button.



The **Save Settings** fields will display:

Group	Sort Columns	Hide Selected Columns	Show Hidden Columns	Export	Save Settings
<p>Save the grid settings and filtering criteria as:</p> <input type="text"/> <p> <input type="checkbox"/> Make it global to everybody <input type="checkbox"/> Set as my default filter </p> <p style="text-align: right;"><input type="button" value="Save Settings"/></p>					

2. Enter a name for these settings in the "**Save the grid settings and filtering criteria as**" section. Make this a name you will recognize for future use.
3. Select the **Make it global to everybody** checkbox if you want these settings to be available to any user who logs onto the system.
4. Select the **Set as my default filter** if you want these settings to be the default for this list.
5. Click the **Save Settings** button when you are done entering information.

Save the grid settings and filtering criteria as:

<input type="text"/> <p> <input type="checkbox"/> Make it global to everybody <input type="checkbox"/> Set as my default filter </p> <p style="text-align: right;"><input type="button" value="Save Settings"/></p>
--

Now when you select **Search > Inventory**, you will be taken to the [Manage Filters](#) page where you can choose to view the list with this saved setting, with a different saved setting or view the list with no filters.

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