Tekla EPM 2019

Set up and manage the inventory

April 2019

Contents

1 Set up and manage the inventory

The **Inventory** module in Tekla EPM consists of two separate parts: inventory and inventory history. In **Inventory**, you can take items from stock, return them to stock, reserve items for a customer order, and so on. In **Inventory History**, you can view the entire history of items in the inventory.

Any item in Tekla EPM becomes an inventory item when it is loaded into a purchase order. Note that you cannot modify the properties of these types of items as long as the items have not yet been received.

For more information, see the following links:

Define the default inventory settings (page 6)

Open the Inventory module (page 9)

Open Inventory History (page 14)

Add an item to inventory (page 24)

Copy an inventory item (page 31)

Modify inventory items (page 32)

Take material from stock and return material to stock (page 36)

Move an item to another inventory location (page 39)

Delete inventory items (page 41)

Add, modify, and delete stock quantities to be maintained (page 44)

Store document references for inventory (page 15)

Add inventory items to Order Entry (page 39)

Combine inventory items manually (page 42)

View inventory details (page 47)

Import and export inventory information (page 60)

1.1 Define the default inventory settings

Before you start using the **Inventory** module for making orders, taking material from stock, and so on, we recommend that you define default settings for the **Inventory** module. Define the company standard settings and the countries of origin, adjust the visible input and display fields of both **Inventory** and **Inventory History**, and customize the drop-down menu commands in the **Inventory** module.

For more information, see the following links:

Define company standard settings for Inventory (page 6)

Define the countries of origin (page 8)

Define company standard settings for Inventory

In the **Inventory Company Standards** dialog box, define the default settings for the **Inventory** module.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Inventory** --> **Company Standards** .
3. In the **Inventory Company Standards** dialog box, set the following properties according to your needs:

Option	Description
Auto-Calc Part #	When selected, Tekla EPM automatically enters a part number for each item when new material is received. When cleared, you need to enter the part number manually.
Part # Format	The part number format. To change the part number format, click the arrow on the right side of the **Part # Format** field, and select an option in the list. The options are: • **[PO#]-[Item#]-[Receive Count]-[RTS Count]**: The part number consists of the purchase order number, purchase order item number, receive count, and return to stock count. Note that the receive count number does not refer to the quantity received, but the occurrence of receiving the material. The

Option	Description
	returned to stock count number indicates how many times the material has been cut. For example, if the purchase order number was 123, the item number 50, quantity 5, and 2 are received, the part number would be 123-50-1-0. When the remaining 3 pieces were received, the part number would be 123-50-2-0. If the length of the material was 40’-0 and you took 25’-0 and returned 15’-0 to inventory, the part number would be 123-50-1-1. • **Sequential, Increments each receipt**: The part numbering starts from 00001, and each time an item is received on a purchase order, the item is assigned an incremented part number (for example, 00002). • **Sequential, Increments each receipt, with RTS count**: The part number consists of a sequential number and the returned to stock count. The part numbering starts from 00001, and each time an item is received on a purchase order, the item is assigned an incremented part number (for example, 00002). The returned to stock count indicates how many times the material has been cut. An example part number could be 00003-1.
Inventory History - Default number of days to view (0 for all)	Allows you to set a filter that defines the number of days that items remain visible in the **Inventory History** dialog box. Note that you can clear the filter in the **Inventory History** dialog box to display all items in the inventory history again. Enter a number in the field. To always display all items in the **Inventory History** dialog box, enter 0.
Transaction History - New Method	When selected, the **Transaction History** opens more quickly. We recommend that you do not clear the **Transaction History - New Method** check box.

4. To adjust the units used in the **Inventory** module, click **Input/Display Units**.

5. In the **Input/Display Units** dialog box, click the arrows on the right side of the fields to select the units and the length input type.

   Note that there are multiple options depending on the required precision and the desired input method.

6. Click **OK**.
7. At the bottom of the **Inventory Company Standards** dialog box, click **Save**.

The default settings of the **Inventory** module are updated.

Define the countries of origin

In the **Countries** dialog box, you can add new countries of origin for items in the inventory. If necessary, modify or delete any existing countries to match the countries used by your company.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Inventory** --> **Countries of Origin** .
3. In the **Countries** dialog box, do any of the following according to your needs:

To	Do this
Add a new country	a. Click **New**. b. Type the country and an abbreviation for it. Only the abbreviation will be shown when you set a country of origin for an item in the **Inventory** dialog box. c. Click **Add**. The new country is now available in the **Inventory** dialog box.
Modify an existing country	a. Select the country that you want to modify. b. Modify the country and its abbreviation. c. Click **Edit** to save the changes.
Delete a country	a. Select the country that you want to delete. b. Click **Delete**. c. In the confirmation dialog box, click **Yes** to permanently delete country.

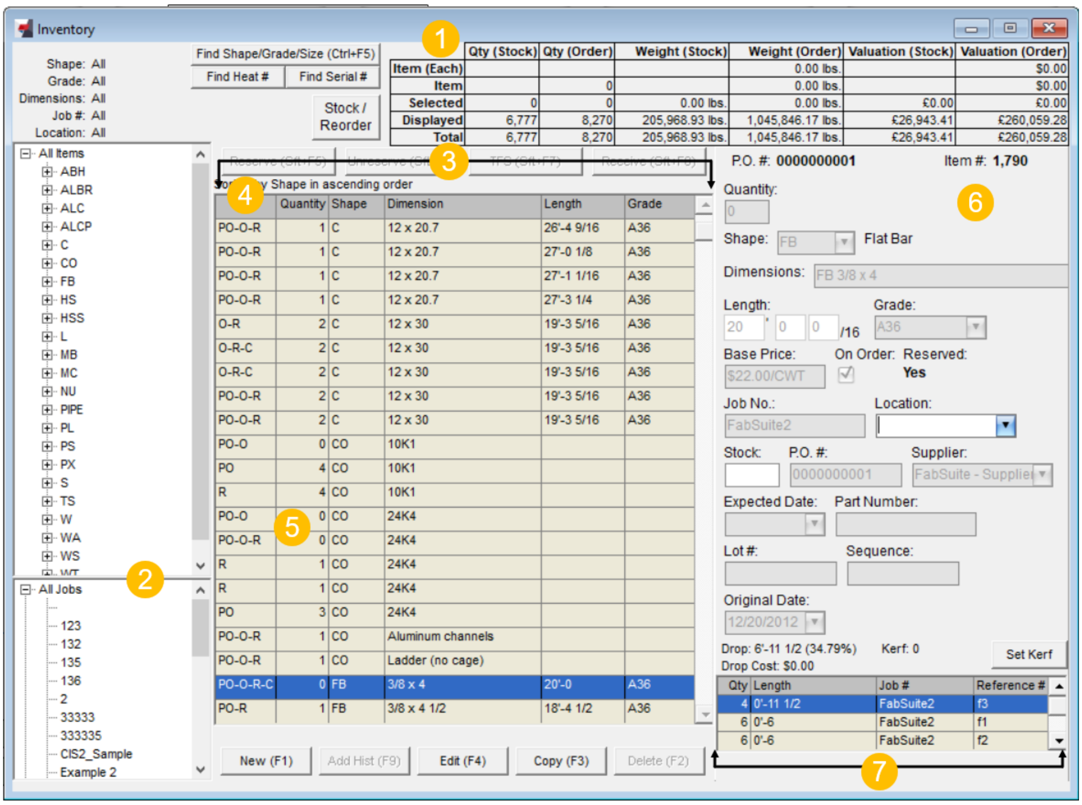
4. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

1.2 Open the Inventory module

To access the **Inventory** module, do the following:

- In the Tekla EPM dialog box, click the **Inventory** icon.

The **Inventory** dialog box opens. See the elements of the dialog box in the following image:



(1) The summary grid shows the quantities, weights, and valuations of items in stock and on order.

(2) The navigation trees on the left to select which items you want to view. The upper navigation tree allows you to only view selected shapes, whereas the lower navigation tree allows you to only view items in a selected job or inventory location.

You can click **+** to expand the list. Then, click the items that you want to view in the display area.

For detailed instructions, see View only particular material dimensions, jobs, or locations in the Inventory dialog box (page 11).

(3) The display area lists all material items in the inventory.

(4) The leftmost unnamed column shows the statuses of different material items. The status indicators consist of the following abbreviations:

- PO: Items are on a purchase order

- O: Items are on order (not yet received)
- R: Items are reserved for a job
- C: Items have been combined

For example, items labeled PO-O-R-C have been combined and are on a purchase order, have been reserved for a job, and have not yet been received.

Items without any status indicator in this column are open stock items and were entered manually.

(5) Zero quantity items are placeholders for items that have been received on a purchase order, but have not been finalized yet. Zero quantity items cannot be modified in the inventory, and the combining details table below the input area does not display any information about whether items are properly linked to production control jobs.

Using zero quantity items in the inventory allows Tekla EPM to properly modify the base pricing if the pricing in the purchase order is modified after the materials have been received and split into different line items.

You can hide the zero quantity items by creating and saving a filter that excludes these items. This way, you will not mistake them for additional material items in the inventory. For more information, see Filter information in the Inventory dialog box (page 12).

(6) The input area allows you to add information for existing or new items. It also displays the properties of an item selected in the display area.

Note that properties of items that are on a purchase order or that are placeholders with zero quantity cannot be modified, so the input fields become inactive if you select them in the display area.

You can modify the available fields in the **Edit Input Fields** dialog box.

(7) The combining details table shows the parts to be cut from the item selected in the display area.

Note that under the combining details table, you can see if the items that are combined to the selected inventory item are properly linked to a production control job.

See also

View only particular material dimensions, jobs, or locations in the Inventory dialog box (page 11)

Filter information in the Inventory dialog box (page 12)

Search for items in the Inventory dialog box (page 13)

Add an item to inventory (page 24)

Modify inventory items (page 32)

Take material from stock and return material to stock (page 36)

Delete inventory items (page 41)

View only particular material dimensions, jobs, or locations in the Inventory dialog box

Use the navigation trees on the left side of the **Inventory** dialog box to only view particular material dimensions, items reserved for specific jobs, and items in specific inventory locations.

- In the **Inventory** dialog box, do any of the following:

To	Do this
View items of the selected shape, grade, and material dimension	1. In the upper navigation tree, click **+** to show all shapes in the estimating job. 2. In the upper navigation tree, click a shape indicator. 3. Optionally, select a material grade and dimension as well. Only items of the selected shape, grade, and material dimension are shown in the display area.
View items of all shapes	• Click **All Items** at the top of the upper navigation tree.
View items reserved for a particular job	1. In the lower navigation tree, click **+** to show all jobs. 2. Click to select a job number. Only items reserved for that job number are shown in the display area.
View all open stock items	1. In the lower navigation tree, click **+** on the left side of **All Jobs** to show all jobs. 2. Click the blank branch directly under **All Jobs**. Only items that are not received for any job are shown in the display area.
View items in all jobs	• In the lower navigation tree, click **All Jobs**.
View items in a specific inventory location	1. In the lower navigation tree, click **+** on the left side of **All Locations** to show all jobs. 2. Click the location. Only items in that inventory location are shown in the display area.
View items without inventory location	1. In the lower navigation tree, click **+** on the left side of **All Locations** to show all jobs.

To	Do this
	2. Click the blank branch directly under **All Locations**. Only items that have not been assigned an inventory location are shown in the display area.
View items in all locations	• In the lower navigation tree, click **All Locations**.

The current selections in the navigation trees are shown above the navigation trees.

Note that the navigation trees also work together, so that you can also limit the displayed information also by selecting items in both navigation trees. For example, you can view items of a specific dimension in a specific job or inventory location.

See also

Filter information in the Inventory dialog box (page 12)

Search for items in the Inventory dialog box (page 13)

Filter information in the Inventory dialog box

Use the **Filter** command to only show the desired items in the **Inventory** dialog box. Filters can be handy for viewing specific inventory materials. You can reset the applied filters at any time by clicking **Clear Filters** at the upper-left corner of the dialog box, so that all items are displayed again.

Note that using filters only affects the way you see the **Inventory** dialog box, so you cannot accidentally change other users' settings.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Filter**.

   The **Inventory Filters** dialog box opens.
3. To filter the displayed items according to selected criteria, select a filter type in the **Type** list, and click **Select**.

   For some filter types, such as location, reference number, or heat number, you can also click **Find** and type the desired value in the blank field to use it. This way, you do not have to scroll through all the available items.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
   - Click the arrow buttons to move the items that you want to display to the **Included** list..
   - Type the maximum and minimum values for the items that you want to display.

5.
6. Click **OK**.

   If you want to further filter the information displayed in the **Inventory** dialog box, repeat steps 3 to 5 for different items.

   If you want to clear all filter settings, click **Reset**.

7. To save commonly used filters, do the following:

   a. Click **Filter Types** in the lower-left corner.

   b. Click **New**.

   c. Type a description for the filter type.

   d. Create the filter settings.

      For more information, see steps 3 to 5.

   e. Click **Add**.

   f. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

      The newly created filter type is selected in the **Filter Types** list.

   g. To apply the filter type, click **Set**.

8. According to your needs, do one of the following:

   - To use the filter, click **Apply Filter**.
   - To use the filter in the job and save it until a new filter is set or the filter is cleared, click **Apply Filter & Save**.

     Note that the filter will remain in use even if you close and re-open the job. After you clear the filters, the filter settings cannot be used again.

The **Filters** dialog box closes, and the **Inventory** dialog box is filtered according to the settings you made.

To display all information in the **Inventory** dialog box again, click **Clear Filters** in the upper-left corner.

Search for items in the Inventory dialog box

Use the different **Find** commands in the **Inventory** dialog box to quickly find the needed material items. You can search for items by material shape, grade, or size, heat number, or serial number.

Search for items by material shape, grade, or size

1. At the top of the **Inventory** dialog box, click **Find Shape/Grade/Size**, or press **Ctrl+F5**.

2. Select the material shape, and optionally grade and dimensions in the appropriate lists.

   You can also type the shape, grade, and dimensions in the appropriate fields.

3. Do any of the following:

   - To find items with the selected material shape, click **Find Shape**.
   - To find items with the selected material shape and grade, click **Find Grade**.
   - To find items with the selected material shape and dimensions, click **Find Size**.

Only items that match your search are displayed in the **Inventory** dialog box. The selected material shape, grade, and dimensions are shown above the navigation trees on the left side of the dialog box.

To view all items again, click **All Items** in the upper navigation tree.

Search for an item by heat number

1. At the top of the **Inventory** dialog box, click **Find Heat #**.
2. Select the heat number in the list, or type it in the field.
3. Click **Find Heat #**.

The item with the selected heat number is selected the **Inventory** dialog box.

Search for an item by serial number

1. At the top of the **Inventory** dialog box, click **Find Serial #**.
2. Select the serial number in the list, or type it in the field.
3. Click **Find Serial #**.

The item with the selected serial number is selected the **Inventory** dialog box.

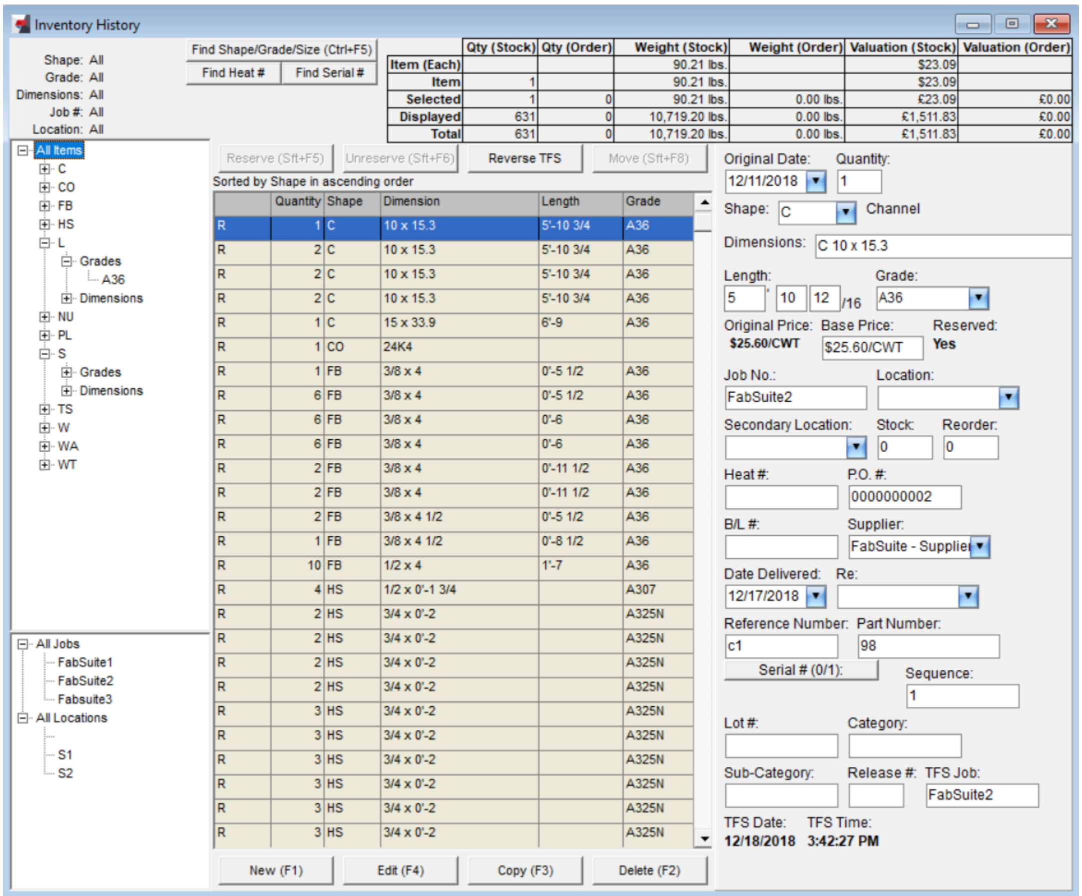
1.3 Open Inventory History

In the **Inventory History** dialog box, you can view all material that has been taken from stock for a job.

1. While in the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Inventory History**.

TIP If you hold down **Shift** when selecting the **Inventory History** command, the **Inventory History** opens in a new dialog box. This way, you can view the inventory and the inventory history at the same time.

The **Inventory History** dialog box opens.



TIP Use the navigation trees on the left of the dialog box to filter which items are visible. For example, to only show items in a specific job, click a job number in the lower navigation tree.

To return to the **Inventory** dialog box, do the following:

1. Click the **Inventory** ribbon tab.
2. In the menu, select **Inventory**.

1.4 Store document references for inventory

Document Index is where you can store documents for reference. When you store documents in **Document Index**, each user that has access to inventory can view them, so it is easy to keep up-to-date. You can save all heat documents, as well as Microsoft Outlook emails and their attachments, in **Document Index**.

To access **Document Index** in the **Inventory** module, do the following:

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Document Index**.

The **Document Index - By Category** dialog box opens. Next, you can either modify the available folders for document references, or add, modify, delete, open, and email document reference files.

See also

Manage document reference categories (page 16)

Add document references to the inventory (page 17)

Open a document reference (page 22)

Modify a document reference (page 22)

Attach a document reference to an email (page 23)

Delete a document reference (page 24)

Manage document reference categories

Use the **Edit Categories** command in **Document Index** to manage the categories that you can use to organize document references. You can add new categories, rename categories, and delete unnecessary categories. You can also change the default folder where document references are saved.

1. At the bottom of the **Document Index - By Category** dialog box, click **Edit Categories**.
2. In the **Document Index - Edit Categories** dialog box, do any of the following:

To	Do this
Add a new category	a. In the navigation tree at the top of the dialog box, select the parent category for the new category. b. Click **Add**. c. Type a name for the new category. For example, `Miscellaneous documents`. d. Click **OK**. The new category is added to the list.

To	Do this
Rename a category	a. In the navigation tree at the top of the dialog box, select the category that you want to rename. b. Type a new name for the category. c. Click **OK**. The category name is updated.
Delete a category	a. In the navigation tree at the top of the dialog box, select the category that you want to delete. b. Click **Delete**. Note that you cannot delete a category that has sub-categories. c. To permanently delete the category, click **Yes** in the confirmation dialog box.
Change the default folder where documents are saved	When documents are added in **Document Index**, the selected document can be either moved or copied to the selected folder. This way, Tekla EPM retains all documents that have been saved to **Document Index**, even if the original documents are moved or deleted. The default folder for saving documents needs to be in the Tekla EPM default folders, so that all users can view the attached documents. Files saved elsewhere than the default location cannot be viewed by other Tekla EPM users. a. Click **Default Dir**. b. Do one of the following: • Select the folder that you want to use as the default folder. • Click **Make New Folder** to add a new folder under the currently selected one, and click it to use it as the default folder. c. Click **OK**.

3. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Add document references to the inventory

You can either upload completely new document references, such as files, emails, and email attachments to **Document Index**, or add files that are already loaded to **Document Index** to the list of inventory document references.

Add new files

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Add File**.
4. In the **Open** dialog box, browse to find the document that you want to add, and select the document.
5. Click **Open**.

   If you want to add more documents with the same settings, click **Add Additional File** and repeat steps 4 to 6 for each document.
6. In the **Add File** dialog box, select the company and contact that provided you with the document in the **File Source** lists.

   You can also drag and drop files to the **Add File** dialog box.
7. According to your needs, do one of the following:
   - To compress multiple documents into one archive, select the **Compress Files into a Single Archive** option.
   - To leave the documents that you added uncompressed, select the **Leave Files Uncompressed** option.
8. According to your needs, do one of the following:
   - To move the original document to the selected folder, select the **Move File** option.
   - To copy the document to the selected folder but leave the original untouched, select the **Copy File (Leave Original)** option.
9. Type a description for the attached document.
10. Click **Add File**.
11. For heat documents, select the supplier, purchase order number, and heat number in the available lists, or type new values in the fields.

    If you are adding a heat document for an item, note that the heat number of the document reference must match the heat number of the item, entered in the **Inventory** dialog box.

12. Type a description for the entire document reference.

    This description applies to all documents, emails, and email attachments that you add.

13. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the documents are added to **Document Index**. You can see all added documents in the list in the **Document Index - By Category** dialog box.

Add a Microsoft Outlook email

1. In Microsoft Outlook, select the email that you want to add.
2. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the email.
3. Click **Add Document Reference**.
4. In the **Document Index - Add Document Reference** dialog box, click **Add Outlook Email**.

   A copy of the email is added to **Document Index**.

   The text of the email is added to the **Description** field.

5. Click **Add File**.
6. Type a description for the entire document reference.

   This description applies to all documents, emails, and email attachments that you add.

7. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the emails are added to **Document Index**.

Add an attachment from a Microsoft Outlook email

1. In Microsoft Outlook, select the email with the attachment that you want to add.
2. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the attachment.
3. Click **Add Document Reference**.
4. In the **Document Index - Add Document Reference** dialog box, click **Add Outlook Attachments**.
5. Browse to the folder where you want to save the email attachment, and click the folder to select it.
6. Click **Open**.

7. In the **Add File** dialog box, select the company and contact that provided you with the document in the **File Source** lists.
8. According to your needs, do one of the following:
   - To compress multiple documents into one archive, select the **Compress Files into a Single Archive** option.
   - To leave the documents that you added uncompressed, select the **Leave Files Uncompressed** option.
9. Type a description for the email attachment.
10. Click **Add File**.
11. Select the supplier, purchase order number, and heat number in the available lists, or type new values in the fields.

    If you are adding a heat document for an item, note that the heat number of the document reference must match the heat number of the item entered in the **Inventory** dialog box.
12. Type a description for the entire document reference.

    This description applies to all documents, emails, and email attachments that you add.
13. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the email attachments are added to **Document Index**.

Search for and add a file already in Document Index

To find and add files that already exist in the document index directory to the inventory side of **Document Index**, use the **Search** command.

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the file.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Search**.
4. In the **Search** dialog box, click **Browse** and select the folder where you want to look for documents.

   TIP To also search from the sub-folders of the selected folder, select the **Sub-Directories** check box.
5. To narrow the search, do one or more of the following:
   - Type the document name, document size, and file name extension.

- In **File Date**, select the dates between which the document has been created or downloaded onto your computer.
- In **Date Loaded**, select the dates between which the document has been added to **Document Index**.
- In the **Source** lists, select the contact and company that have provided the document.

6. To include archived documents in the search, select the **Include All Archive Files** check box.
7. Click **Search**.

   The search results appear at the top of the **Search** dialog box.
8. In the search results, double-click the document that you want to add.
9. Select the supplier, purchase order number, and heat number in the available lists, or type new values in the fields.

   If you are adding a heat document for an item, note that the heat number of the document reference must match the heat number of the item, entered in the **Inventory** dialog box.
10. Type a description for the entire document reference.

    This description applies to all documents, emails, and email attachments that you add.
11. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The file is added to the list of inventory documents in **Document Index**.

Browse for and add a file already in Document Index

To browse for and add files that already exist in the document index directory to the inventory side of **Document Index**, use the **Find By Directory** command. You can also add new files, delete existing files, rename folders and files, move files to other folders, and open files.

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the file.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Find By Directory**.
4. In the navigation tree on the left of the **Document Index - By Directory** dialog box, select a category.

   If you want to rename the selected category, you can click **Rename Directory**, type a new name, and click **OK**.

   The documents within the category are listed in the display area of the dialog box.

5. Select a document.
6. In the lower-right corner, click **Select**.

   Note that besides adding an existing document to the current job, you can also use the buttons at the bottom of the dialog box to:

   - Add new documents (**Add File**).
   - Delete a document (**Delete File**).
   - Move a document to another folder within the document index folder (**Move File**).
   - Rename a document (**Rename File**).
   - Open a document (**Open File**).
7. Select the supplier, purchase order number, and heat number in the available lists, or type new values in the fields.

   If you are adding a heat document for an item, note that the heat number of the document reference must match the heat number of the item, entered in the **Inventory** dialog box.
8. Type a description for the entire document reference.

   This description applies to all documents, emails, and email attachments that you add.
9. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The file is added to the list of inventory documents in **Document Index**.

Open a document reference

Use the **Open File** command to open and view a document reference.

1. In the **Document Index - By Category**, select the document that you want to open.
2. Click **Open File**.

The selected document opens.

See also

Add document references for estimating jobs (page 0)

Modify a document reference (page 22)

Attach a document reference to an email (page 23)

Delete a document reference (page 24)

Modify a document reference

Use the **Edit Document Reference** command to modify the source and description of a document in **Document Index**.

1. In the **Document Index - By Category** dialog box, select the document that you want to modify.
2. Click **Edit Document Reference**.
3. In the **Document Reference Details** dialog box, click **Filename**.
4. In the **File Details** dialog box, modify the file source and description according to your needs.
5. Click **Save**.
6. To close the **File Details** dialog box, click the **Close** button (**X**) in the upper-right corner.
7. Modify the description according to your needs.

   Entering a description in the **Document Reference Details** dialog box will override the description that you entered in the **File Details** dialog box. This description will then appear in the **Description** column in the **Document Index - By Category** dialog box.
8. Click **Save**.
9. To close the **Document Reference Details** dialog box, click the **Close** button (**X**) in the upper-right corner.

See also

Add document references for estimating jobs (page 0)

Open a document reference (page 22)

Delete a document reference (page 24)

Attach a document reference to an email

Use the **Email File** command to create a new Microsoft Outlook email and send a document to the desired recipients via email.

1. In the **Document Index - By Category** dialog box, select the document that you want to send via email.
2. Click **Email File**.

   Microsoft Outlook opens. A new email with the selected document is created, with the selected document attached to it.
3. Add recipients and modify the text of the email.
4. Send the email.

See also

Add document references for estimating jobs (page 0)

Open a document reference (page 22)

Delete a document reference

Deleting a document reference from **Document Index** is permanent and cannot be undone. If you delete a document reference, you or any other Tekla EPM users will not be able to access the document reference or any documents, emails, or attachments that it contains, from **Document Index**.

1. In the **Document Index - By Category** dialog box, select the document reference that you want to delete.
2. Click **Delete Document Reference**.
3. To permanently delete the document reference, click **Yes** in the confirmation dialog box.

See also

Add document references for estimating jobs (page 0)

Modify a document reference (page 22)

Open a document reference (page 22)

1.5 Manage inventory items

You can manage inventory items in multiple ways. After adding the necessary inventory items, you can copy and modify the items according to your needs. You can also take material from stocks and return the remaining material to stock, reserve or send inventory items to customer orders, combine inventory items, or delete unnecessary inventory items.

For more information, see the following links:

Add an item to inventory (page 24)

Copy an inventory item (page 31)

Modify inventory items (page 32)

Take material from stock and return material to stock (page 36)

Add inventory items to Order Entry (page 39)

Combine inventory items manually (page 42)

Delete inventory items (page 41)

Add an item to inventory

To add new items manually to the inventory, do the following:

1. In the **Inventory** dialog box, click **New**.
2. Modify the item properties according to your needs:

   The properties marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Original Date *	The date on which the item has originally been added to inventory. Click the arrow on the right side of the **Original Date** field and select a date in the calendar.
Quantity *	The number of pieces to be added. Use the numeric keypad in the quantity field to add, multiply, divide, or subtract numbers to adjust the quantity.
Shape *	The material shape of each piece. Either click the arrow on the right side of the **Shape** field to select the shape, or type the shape indicator in the field (for example, HSS).
Grade	The material grade of each piece. Depending on the shape, the grade can also be mandatory information. Either click the arrow on the right side of the **Grade** list to select the grade, or type the grade indicator in the field.
Dimensions	The material dimension, or material size, of each piece. Depending on the shape, the dimension can also be mandatory information. Click the **Dimensions** field to select an available material dimension, and double-click the desired dimension in the list. **TIP** You can also use a custom material dimension. Note that

Option	Description
	the dimension is not automatically added to the material database. To use a custom dimension, do the following: a. Click in the **Dimensions** field. b. Click **Add Size**. c. Define the dimension properties. d. Click **Save**. You can now select the dimension and use it.
Length	The length of each piece. Default length input settings are set in **Company Standards**, but you can modify them for each job.
Base Price	The base price of the material item. We recommend that you use base prices to create more detailed reports. Type the base price in the **Base Price** field. To change the base price units and convert the current price to the selected units, right-click the **Base Price** field, and select an appropriate option in the context menu.
On Order	When selected, the material item is on order and has not yet been received. When cleared, the material item is marked as received. Items that are on order are marked with an **O** in the leftmost column of the **Inventory** dialog box.
Job No.	Any job number. For example, you can use the **Job No.** field to reserve

Option	Description
	material for the shop or maintenance, so that it cannot be used elsewhere. Type any desired information in the **Job No.** field.
Location	The inventory location of the material item. Click the arrow on the right side of the **Location** field and select a location in the list, or type a new location in the **Location** field.
Secondary Loc	The secondary inventory location of the material item. Click the arrow on the right side of the **Secondary Loc** field and select a location in the list, or type a new secondary location in the **Secondary Loc** field. For example, you can use secondary locations to represent the inventory sites or the date the location was verified. You can also use the **Secondary Loc** field to provide a temporary location for storing some pieces of a material item. This way, you can split the quantity of the material item without affecting the location.
Stock	Any stock information about the item. Type any information in the **Stock** field. **NOTE** Use the **Stock/Reorder** command to set stock quantities to be maintained. See Add, modify, and delete stock quantities to be maintained (page 44).
Reorder	Any reordering information about the item. Type any information in the **Reorder** field.

Option	Description
	NOTE Use the **Stock/Reorder** command to set stock quantities to be maintained. See Add, modify, and delete stock quantities to be maintained (page 44).
Heat #	The heat number of the material item. Type the heat number in the **Heat #** field. Note that you need to type a heat number for a material item before attaching documents to it in **Document Index**.
P.O. #	The number of the purchase order that contains the material item. Type the purchase order number in the **P.O. #** field. Note that you need to type a purchase order number for a material item before attaching documents to it in **Document Index**.
B/L #	The bill of lading number or the shipment number that the material item was received on. Type the number in the **B/L #** field.
Supplier	The supplier of the material item. Either type a supplier in the **Supplier** field, or click the arrow on the right side of the **Supplier** field and click the supplier that you want to select. Note that you need to type a supplier for a material item before attaching documents to it in **Document Index**.
Date Delivered	The date when the material item has arrived to inventory. Do one of the following:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td></td><td>• Type the date in the Date Delivered field.

The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.

• Click the arrow on the right side of the Date Delivered field and select the delivery date in the calendar.

Note that the Date Delivered field is only available if the On Order check box is cleared.</td></tr>
<tr><td>Re</td><td>Any comments or remarks that you want to add about the material item.

Type the remarks in the Re field, or click the arrow on the right side of the Re field and click an existing comment in the list to use it.</td></tr>
<tr><td>Reference Number</td><td>A reference number that links items in inventory or purchasing to the production control job.

The reference number can be different depending on the case:

• If an item is sent from Production Control to Purchasing or Inventory, Tekla EPM creates a copy of the record, and the item is linked to include the reference number.

• If an item is sent to purchasing from an advanced bill of material, the system mark number or a combination of the page number and the item number in the combining job (for example, 1-30) becomes the reference number.

• If the item is sent to purchasing later in the process, the reference number is the mark or piece mark number.

However, if the reference number has been assigned in the production control job, that</td></tr>
</table>

Option	Description
	reference number is maintained in the inventory as well. We recommend that you do not type information in the **Reference Number** field when adding items to the inventory manually.
Serial #	The serial number of the material item. To add a serial number, click the **Serial #** button. For more information, see Define serial numbers for an inventory item (page 32).
Part Number	The part number of the material item. Type the part number in the **Part Number** field. To adjust part number settings, see Define the default inventory settings (page 6).
Lot #	The lot identification assigned to the material item in **Production Control**. We recommend that you do not type any information in the **Lot #** field when you add inventory items manually. Note that if you type any information manually in the **Lot #** field, the information will be overwritten if you combine or link material from **Production Control** to the inventory item.
Sequence	The sequence number assigned to the item in **Production Control**. We recommend that you do not type any information in the **Sequence** field when you add inventory items manually. Note that if you type any information manually in the **Sequence** field, the information will be overwritten if you combine or link material from **Production Control** to the inventory item.

Option	Description
Category **Sub-Category**	Classes used for sorting items, assigned to the item in **Production Control**. Categories and sub-categories can be used for filtering information. We recommend that you do not type any information in the **Category** and **Sub-Category** fields when you add inventory items manually. Note that if you type any information manually in the **Category** or **Sub-Category** field, the information will be overwritten if you combine or link material from **Production Control** to the inventory item.
Country	The country of origin of the material item. Click the arrow on the right side of the **Country** field, and select a country in the list. The available countries can be modified in the **Countries** dialog box. For more information, see Define the countries of origin (page 8).
Heat SN	A property that ensures that heat numbers are not duplicated. However, duplications are extremely rare, so using the **Heat SN** field is optional. If necessary, type a value in the **Heat SN** field.

3. Click **Add**.

The new material item is added to the list in the **Inventory** dialog box.

Copy an inventory item

Copy a material item in the **Inventory** dialog box and use it as the basis of a similar item. Then, adjust any properties according to your needs. By copying items, you can save time and avoid entering the same data multiple times.

1. In the **Inventory** dialog box, click the material item that you want to copy.
2. At the bottom of the dialog box, click **Copy**.

The item is copied and added in the list.

Note that not all values in the leftmost column are copied. For example, **PO** indicates that the item has been sent to a purchase order, so it is not used for new, manually added inventory items.

Modify inventory items

You can either modify items in inventory one by one, or use the different **Global Edit** commands to modify multiple items at one go. Note that inventory items that are on a purchase order or that are placeholders with zero quantity cannot be modified, so the input fields become inactive if you select them in the display area.

For more information, see the following links:

Modify multiple inventory items (page 33)

Modify selected inventory items (page 34)

Modify the shape, grade, dimension, or length of inventory items (page 35)

Modify the shape, grade, dimensions, or length of the selected inventory items (page 36)

Define serial numbers for an inventory item

You can add serial numbers for a material item in the **Inventory** dialog box. Note that you can only add a serial number for items that have been marked as received, and are not on order.

1. In the **Inventory** dialog box, click a material item to select it.
2. On the right side of the dialog box, click **Serial #** under the **Reference Number** field.
3. In the **Serial Numbers** dialog box, do one of the following:
    - To assign a different serial number for each piece of the material item, select the **Serialized** option.

      If you use or plan to use bar codes, do not select the **Serialized** option. Using the **Serialized** option prevents displaying serial numbers in some reports.
    - To use the same serial number for all pieces of the material item, select the **Non-Serialized** option.
4. Click **Update**.
5. Click **New** to define a new serial number.
6. Enter the serial number in the **Serial #** field.
7. Click **Add**.

Repeat steps 5 to 7 for each serial number that you want to create.

If necessary, you can:

- Modify a serial number, and update it by clicking **Save**.
- Delete a serial number by clicking **Delete**, and then, clicking **Yes** to confirm.

8. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

The serial numbers appear under the **Serial #** button in the **Inventory** dialog box.

Modify a single inventory item

You can modify the properties of a single inventory item directly in the **Inventory** dialog box.

Note that if you only want to modify some pieces in an item, you need to split the item first. You can do so by either moving the desired quantity of pieces to a different location or secondary location, or changing the reservation of the quantity.

1. In the **Inventory** dialog box, select the item that you want to modify.
2. On the right side of the dialog box, modify the item properties according to your needs.
3. Click **Edit** to save the changes.

See also

Modify selected inventory items (page 34)

Modify multiple inventory items (page 33)

Modify the shape, grade, dimension, or length of inventory items (page 35)

Modify the shape, grade, dimensions, or length of the selected inventory items (page 36)

Modify multiple inventory items

Use the **Global Edit** command to make specific changes to the properties of all or multiple items in the inventory at one go. This way, you can save time, as you do not need to change the properties of each item individually.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Global Edit** --> **Global Edit** .
3. To only modify specific types of items, select a filter type in the **Type** list, and click **Select**.

4. In the **Filter** dialog box, click the arrow buttons to move the items whose properties you want to modify to the **Included** list.
5. Click **OK**.

   To further limit the items to modify, repeat steps 3 to 5 for all necessary filter types.

6. Click **OK** at the bottom of the **Inventory Global Edit Filters** dialog box.
7. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

   You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
8. Modify any properties in the **Global Edit** dialog box according to your needs.

   For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
9. Click **Update**.
10. To update the selected properties, click **Yes** in the confirmation dialog box.

The **Global Edit** dialog box closes. The changes you made to the inventory item properties are updated to the **Inventory** dialog box.

See also

Modify selected inventory items (page 34)

Modify the shape, grade, dimension, or length of inventory items (page 35)

Modify the shape, grade, dimensions, or length of the selected inventory items (page 36)

Modify selected inventory items

Use the **Global Edit Selected** command to select a group of inventory items and modify their properties at one go.

1. In the **Inventory** dialog box, select the items that you want to modify.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Click the **Inventory** ribbon tab.
3. In the menu, select **Global Edit** --> **Global Edit Selected** .
4. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

   You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

5. Modify any properties in the **Global Edit** dialog box according to your needs.

   For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
6. Click **Update**.

The **Global Edit** dialog box closes. The changes you made to the inventory item properties are updated to the **Inventory** dialog box.

See also

Modify the shape, grade, dimension, or length of inventory items (page 35)

Modify multiple inventory items (page 33)

Modify the shape, grade, dimensions, or length of the selected inventory items (page 36)

Modify the shape, grade, dimension, or length of inventory items

Use the **Global Edit By Shape** command to modify the shape, grade, dimension, or length of the filtered items in the **Inventory** dialog box.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Global Edit** --> **Global Edit By Shape** .
3. To only modify specific types of items, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, click the arrow buttons to move the items whose properties you want to modify to the **Included** list.
5. Click **OK**.

   To further limit the items to be modified, repeat steps 3 to 5 for all necessary filter types.
6. At the bottom of the dialog box, click **OK**.

   The **Global Edit** dialog box opens.
7. Modify any properties in the **Global Edit** dialog box according to your needs.

   For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
8. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

   You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
9. Click **Update**.

10. In the confirmation dialog box, click **Yes** to update the properties.

The **Global Edit** dialog box closes. The changes you made to the inventory item properties are updated to the **Inventory** dialog box.

See also

Modify multiple inventory items (page 33)

Modify selected inventory items (page 34)

Modify the shape, grade, dimensions, or length of the selected inventory items (page 36)

Modify the shape, grade, dimensions, or length of the selected inventory items

Use the **Global Edit Selected By Shape** command to modify the material shape, grade, dimensions, or length of the selected items in the inventory.

1. In the **Inventory** dialog box, select the items that you want to modify.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click the **Inventory** ribbon tab.
3. In the menu, select **Global Edit** --> **Global Edit Selected By Shape** .

   The **Global Edit** dialog box opens. The shape to be updated is shown at the top of the dialog box.

4. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

   You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

5. Modify any properties in the **Global Edit** dialog box according to your needs.

   For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

The changes you made to the inventory item properties are updated to the **Inventory** dialog box.

See also

Modify multiple inventory items (page 33)

Modify selected inventory items (page 34)

Modify the shape, grade, dimension, or length of inventory items (page 35)

Take material from stock and return material to stock

Use the **TFS** command to take materials from stock and cut them. Then, use the **RTS** command to return the remaining lengths to stock.

1. In the **Inventory** dialog box, click items to select them.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click **TFS**, or press **Shift+F7**.

   Depending on whether the items are linked or combined to a job, one of the following happens:

   - If the items are not linked or combined to a job or you have selected multiple items that are linked or combined to a job, the **Take From Stock** dialog box opens.
   - If a single item is selected and it is linked or combined to a job, a confirmation dialog box appears.

3. Do one of the following:

To	Do this
Take from stock one or multiple items that are not linked or combined to a job	a. In the **Take From Stock** dialog box, type the quantity of pieces and the job number. Note that if you have selected multiple items, Tekla EPM automatically takes all available pieces from stock. b. If necessary, modify the category, sub-category, sequence, lot number, and release number. c. Click **TFS** to take the material from stock. d. In the **RTS** section of the dialog box, type the quantity, width, length, location, and job number of items that you want to return to stock. e. Click **RTS** to return the remaining material lengths to stock. f. Click **Apply**.
Take from stock multiple items that are linked or combined to a job	a. In the **Take From Stock** dialog box, type the job number. b. If necessary, modify the category, sub-category, sequence, lot number, and release number.

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>c. To return all drop left from cutting to stock, select the Return Drop of Combined Items to Stock check box.
d. Click TFS to take the material from stock.</td></tr>
<tr><td>Take from stock a single item that is linked or combined to a job</td><td>a. To update the linked production control when taking the material from stock, click Yes in the confirmation dialog box.
b. In the Enter Value dialog box, do one of the following:
• Type the date in the Enter Value field.
The acceptable formats are YYYY/MM/DD, YY/MM/DD, MM/DD/YYYY, and MM/DD/YY.
• Click the arrow on the right side of the Date Required field and select the date in the calendar.
c. Click OK.
d. To confirm taking the material item from stock, click Yes in the confirmation dialog box.
e. In the TFS dialog box, do one of the following:
• To close the dialog box and return to the Inventory dialog box, click Close.
• To view or print TFS reports, click Reports.
For more information, see View and print TFS reports (page 57).</td></tr>
</table>

Take selected materials from stock

Use the **TFS - Selected** command to take selected inventory items from stock, cut them, and move the cut lengths into the inventory history. The remaining drop remains in the inventory. Once the materials have been taken from stock, you can view or print different reports for the materials.

1. In the lower navigation tree of the **Inventory** dialog box, select a job number.

   Only the items within the selected job are displayed in the display area.
2. Click the **Inventory** ribbon tab.
3. In the menu, select **Production Control** --> **TFS - Selected** .

   The **Enter Value** dialog box opens.
4. Enter a date for taking the materials from stock.

5. Click **OK**.
6. To take the selected materials from stock, click **Yes** in the confirmation dialog box.

   The selected items are taken from stock. You can see the progress in the **TFS** dialog box. Wait until the process is completed.
7. Do any of the following:

To	Do this
View or print a report on the TFS process	a. Click **Reports**. The **Report Progress** dialog box opens. b. Select the report that you want to print or view. c. Do any of the following: • To view the report, click **View**. • To print the report, click **Print**, select the printer, and click **OK**. d. To close the **Report Progress** dialog box, click the **Close** button (**X**) in the top right corner.
Close the **TFS** dialog box	• Click **Close**.

Move an item to another inventory location

Use the **Move** command to move a single inventory item to another inventory location.

1. In the **Inventory** dialog box, select the item whose location you want to change.
2. Click **Move**, or press **Shift+F8**.

   The **Move** dialog box opens.
3. In the **Quantity** field, enter the number of pieces that you want to move.
4. Click the arrow on the right side of the **Location** list and select the new location.
5. If necessary, click the arrow on the right side of the **Sec Location** list to select a secondary location.
6. Click **Move**, or press **F4**.

The selected quantity of items is moved to the selected location.

Add inventory items to Order Entry

Use the **Add Selected to Order** and **Quick Quote** commands to add items to **Order Entry**. The **Add Selected to Order** command reserves the selected items for a customer order, whereas the **Quick Quote** command adds the selected items directly into a quote or a customer order. Note that you can only add unreserved items to **Order Entry**.

Reserve items for a customer order

1. In the **Inventory** dialog box, select the items that you want to load to a customer order.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click the **Inventory** ribbon tab.
3. In the menu, select **Order Entry** --> **Add Selected to Order** .
4. In the **Select Quote/Order** dialog box, select the customer order to which you want to load the items.
5. Click **OK**.

The **Select Quote/Order** dialog box closes. The items are reserved for the selected customer order.

Send items to a customer order

1. In the **Inventory** dialog box, select the items that you want to add to a quote or customer order.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click the **Inventory** ribbon tab.
3. In the menu, select **Order Entry** --> **Quick Quote** .

   The **Quick Quote** dialog box opens. The properties of the selected items are visible in the **Details** section of the dialog box.

4. In the **Customer Name** list, select the customer company.

   Note that the customer must already be saved in the **Address Book**.

   Tekla EPM automatically fills in the customer code and the default contact.

5. If necessary, in the **Contact** list, select another contact person.
6. According to your needs, do any of the following:

To	Do this
Send items to an existing quote or customer order	a. Click **Save to Quote/Order**. The **Select Quote/Order** dialog box opens. b. Select the quote or order to which you want to send the items. c. Click **OK**. The items are sent to the selected quote or order.
Send items to a new quote	a. Click **Save to New Quote**. b. To create a new quote and send the selected items to it, click **Yes** in the confirmation dialog box. c. In the **Quote** dialog box, modify the quote according to your needs. For more information, see . d. Click **Save Quote Information**. e. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.
Send items to a new customer order	a. Click **Save to New Order**. b. To create a new order and send the selected items to it, click **Yes** in the confirmation dialog box. c. In the **Order** dialog box, modify the order according to your needs. For more information, see . d. Click **Save Order Information**. e. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

7. To close the **Quick Quote** dialog box, click the **Close** button (**X**) in the upper-right corner.

Delete inventory items

You can delete unnecessary material items from inventory. Note that deleting the items is permanent and cannot be undone.

You can still view the deleted items in the transaction history. For more information, see View the transaction history in the Inventory module (page 54).

1. In the **Inventory** dialog box, click the items that you want to delete.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click **Delete**.
3. To permanently delete the inventory item, click **Yes** in the confirmation dialog box.

Combine inventory items manually

You can manually combine items in the **Inventory** dialog box by activating the manual combine mode. You can select pieces to combine them into a stock length, or uncombine pieces from a stock length.

Switch to the manual combine mode

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Switch to Manual Combine Mode**.

The **Inventory** dialog box changes to the manual combine mode. New buttons appear at the bottom of the dialog box to enable adding and removing combined items from the selected inventory item.

You can now combine inventory items manually.

Combine materials

Use the **Add Items** command to combine materials into a selected stock length.

1. In the **Inventory** dialog box, click a stock length to select it.
2. At the bottom of the dialog box, click **Add Items**.

   The **Add Item** dialog box opens. You can see all available uncombined materials that can be combined to the selected stock length. If the dialog box is blank, no materials are available to be combined to the selected stock length.

Note that the available materials come from requisitions. If the items that you want to combine are in a production control job, you need to add them to a requisition before you can combine them manually.

3. In the **Add Item** dialog box, click an uncombined item to select it.
4. If necessary, modify the quantity of inventory items that you are combining materials to.

   If the quantity is greater than 1, the materials should be multiples of that quantity in order to be displayed and selected in the **Add Item** dialog box.
5. To allow material grade substitutions, select the **Use Grade Substitutions** check box.
6. Click **Add**.

The selected material items are combined to the selected stock length.

Uncombine materials

Use the **Remove Item** to uncombine material items from a selected stock length.

1. In the **Inventory** dialog box, click a stock length to select it.
2. At the bottom of the dialog box, click **Remove Item**.

   If the selected stock length is not combined, the **Remove Item** button is not available.
3. In the **Remove Item** dialog box, use the arrow buttons to move the materials that you want to uncombine to the **Included** list.

   To only move one piece of the selected item, click the **Qty 1** buttons.
4. Click **OK**.
5. In the confirmation dialog box, do one of the following:
   - To simply uncombine the pieces, click **No**.

     Select the **No** option if you are removing items to clear the material of items that are no longer linked.
   - To uncombine the pieces and return the items to the requisition from which they were loaded to a purchase order, click **Yes**.

The items are held in the requisition to be recombined and purchased, or combined into a different stock length.

If the requisition no longer exists or the material item was never on a requisition, Tekla EPM asks you to select a requisition or add a new one.

The confirmation dialog box and the **Remove Item** dialog box close. The pieces are uncombined from the selected stock length.

Switch back to the input mode

1. Click the **Inventory** ribbon tab.
2. In the menu, select **Switch to Input Mode**.

The **Inventory** dialog box changes back to the input mode.

1.6 Add, modify, and delete stock quantities to be maintained

In the **Stock/Reorder** dialog box, you can add, modify, and delete stock quantities that should always be maintained in inventory. This way, Tekla EPM can alert you when you need to reorder items.

To access the **Stock/Reorder** dialog box, do the following:

- At the top of the **Inventory** dialog box, click **Stock/Reorder**.

The **Stock/Reorder** dialog box opens, displaying previously created records.

Note that the items in the **Stock/Reorder** dialog box are color-coded:

- Green items are equal or above the required stock quantity.
- Yellow items are below the required stock quantity.
- Red items are below both the required stock quantity and the required reorder quantity.

Add a new stock record

1. At the bottom of the **Stock/Reorder** dialog box, click **Add New Record**.

   The **Stock/Reorder - Add** dialog box opens.
2. Select the shape, dimensions, grade, and length to be ordered.
3. If necessary, in the **Location** list, select the location where the items will be stored.

   Note that if you select a location, the record only applies to the quantities of items in the assigned location.

4. In the **Stock Qty** field, enter the stock quantity that should be maintained.
5. In the **Reorder Qty**, enter the quantity at which Tekla EPM prompts you to reorder the item.
6. Click **Add**.

The **Stock/Reorder - Add** dialog box closes, and the new record is added to the list in the **Stock/Reorder** dialog box.

Modify stock records

1. In the list in the **Stock/Reorder** dialog box, click the record that you want to modify.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Modify the values in the **Stock Qty** and **Reorder Qty** fields according to your needs.
3. Click **Save**.

Delete stock records

1. In the list in the **Stock/Reorder** dialog box, click the record that you want to delete.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Click **Delete Selected**.
3. To permanently delete the record, click **Yes** in the confirmation dialog box.

Load stock items to a requisition

1. In the list in the **Stock/Reorder** dialog box, click the items that you want to send to a requisition.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Click **Requisition**.

3. In the **Select Requisition** dialog box, do one of the following according to your needs:

To	Do this
Add the items into a new requisition	a. Click **Add**. b. Modify the requisition number and description according to your needs. c. If necessary, modify other requisition properties. d. Click **Save**. e. Select the new requisition in the list. f. Click **OK**.
Add the items into an existing requisition	a. Select a requisition in the list. b. Click **OK**.

The items are loaded to the selected requisition.

Load stock items to a purchase order

1. In the list in the **Stock/Reorder** dialog box, click the items that you want to send to a purchase order.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click **Purchase Order**.
3. In the **Select Purchase Order** dialog box, do any of the following according to your needs:

To	Do this
Add the items into a new requisition	a. Click **Add**. b. Modify the purchase order number according to your needs. c. Add vendor details for the purchase order. d. If necessary, modify other purchase order properties. e. Click **Save**. f. Select the new purchase order in the list. g. Click **OK**.
Add the items into an existing requisition	a. Select a purchase order in the list.

To	Do this
	b. Click **OK**.

The items are loaded to the selected purchase order. In the **Stock/Reorder** dialog box, the items are color-coded to reflect the purchase activity.

1.7 View inventory details

You can view different details of inventory materials, including the heat documents attached to items, the location of barcoded materials, the total value of inventory materials, and the transaction history. You can also view TFS report and inventory reports, and print or export them according to your needs.

For more information, see the following links:

View heat documents attached to inventory items (page 47)

View the location of barcoded materials (page 49)

View the value of inventory materials (page 51)

View the transaction history in the Inventory module (page 54)

View and print TFS reports (page 57)

View, print, and export inventory reports (page 58)

View heat documents attached to inventory items

Use the **Check Heat Documents** command to view if inventory items have heat documents attached to them. You can also save or print the available heat documents, or create reports on the items that have or do not have heat documents.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Check Heat Documents**.
3. To limit the item types whose heat documents you want to check, in the **Inventory - Check Heat Documents** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
   a. Click the arrow buttons to move the items whose heat documents you want to view to the **Included** list.
   b. Type the maximum and minimum values for the items whose heat documents you want to view.

5. Click **OK**.

   To further limit the item types, repeat steps 3 to 5 for all necessary filter types.

6. Click **Check Heat Documents**.

   All inventory items that match the filters that you set are displayed. If an item has attached heat documents, you can see the number of the heat documents in the **Docs** column. If an item does not have attached heat documents, the **Docs** column is highlighted with red.

7. According to your needs, do any of the following:

To	Do this
Update heat document information	• Click **Refresh**. Any new or modified information is updated.
Add, modify, and delete heat documents in **Document Index**	a. Click **Open Document Index**. **Document Index** opens. For more information, see Store document references for inventory (page 15).
Save heat documents	a. Do one of the following: • To only save particular heat documents, click the item whose documents you want to save, and click **Save Documents** --> **Save Documents - Selected** . • To save all available heat documents, click **Save Documents** --> **Save Documents - All** . b. In the **Browse For Folder** dialog box, browse to an empty folder where you want to save the heat document information. c. Click **OK**. A report of the heat documents opens.
Print heat documents	a. Do one of the following: • To only print particular heat documents, click the items whose documents you want to print, and click **Print Documents** --> **Print Documents - Selected** . • To print all available heat documents, click **Print Documents** --> **Print Documents - All** . b. In the **Select Printer** dialog box, click a printer to select it.

To	Do this
	c. Click **OK**. All or the selected heat documents are printed.
Create reports	a. Do one of the following: • To create a report only containing particular items, click the items to select them, and click **Reports** --> **Reports - Selected** . • To create a report containing all items, click **Reports** --> **Reports - All** . b. In the **Report Selection** dialog box, click the report that you want to create. c. Do one of the following: • To view the report, click **View**. • To print the report, change the number of copies by clicking the **+** and **-** buttons, and click **Print**. • To export the report, click **Export**, modify the export format, file name, and location, and click **Export** again.

8. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

View the location of barcoded materials

Use the **Location Sweep** command to create location sweep reports, which show the location of yard materials that have been identified by barcodes. Note that the **Location Sweep** command is only available for items with serial numbers.

To access the **Inventory Location Sweeps** dialog box, do the following:

1. While in the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Barcode** --> **Location Sweep** .

The **Inventory Location Sweeps** dialog box opens.

According to your needs, do any of the following.

View the location of barcoded materials

1. Click **New Location Sweep**.

2. To only view locations of specific types of materials, select a filter type in the **Type** list, and click **Select**.
3. In the **Filter** dialog box, click the arrow buttons to move the materials that you want to include in the location sweep to the **Included** list.

   To further limit the materials included, you can repeat steps 2 to 3 for all necessary filter types.
4. Click **Make Report**.
5. In the **Report Selection** dialog box, select the report that you want to view.
6. Click **View**.

   The location sweep report opens in **Tekla EPM Report Viewer**.

Delete a location sweep

1. Select an existing location sweep in the **Inventory Location Sweeps** dialog box.
2. Click **Delete Location Sweep**.
3. To permanently delete the location sweep, click **Yes** in the confirmation dialog box.

Cancel remaining items from a location sweep

1. Select an existing location sweep in the **Inventory Location Sweeps** dialog box.
2. Click **Cancel Remaining**.
3. To cancel the remaining items, click **Yes** in the confirmation dialog box.

Complete the location sweep and move remaining items

1. Select an existing location sweep in the **Inventory Location Sweeps** dialog box.
2. Click **Complete - Move Remaining**.
3. To complete the location sweep and move the remaining items, click **Yes** in the confirmation dialog box.

View, print or export reports of an existing location sweep

1. Select an existing location sweep in the **Inventory Location Sweeps** dialog box.
2. Click **Reports - Selected**.

3. In the **Report Selection** dialog box, select the report that you want to view, print, or export.
4. According to your needs, do any of the following:

To	Do this
View the report	• Click **View**.
Print the report	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK**.
Export the report	a. Click **Export**. b. In the **Export Format** list, select an export format. c. Click **Browse**. d. Browse to the location where you want to save the exported file, and click **Save**. e. Modify the file name according to your needs. f. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box. g. If you want to open the file after exporting it, select the **Open Exported Document** check box. h. Click **Export**. The location sweep report is saved to the selected location.

View the value of inventory materials

Use the **Valuation** command to view the value of materials in inventory. You can view the value either by date and time, by date, or by archive.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.

2. In the menu, select **Valuation** and one of the following options:
   - **Valuation by Date/Time**: shows the current value of materials in stock or on order, or the value of materials on a specific date and time.
   - **Valuation by Date**: shows the value of material on a specific date.
   - **Valuation from Archive**: shows the valuation of materials in an archive file.

According to your needs, see one of the following sets of instructions.

View the current material value in inventory or the material value on a specific date and time

1. In the menu, select **Valuation** --> **Valuation by Date/Time** .
2. In the **Archive Date/Time** dialog box, do one of the following:
   - To view the material values on a specific date and time, select the date and time in the appropriate lists, and click **OK**.
   - To view the current material values, click **Use Current Inventory**.
3. To only include specific types of items in the valuation report, in the **Inventory Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. click the arrow buttons to move the item types that you want to include to the **Included** list.
5. Click **OK**.
6. Click **Make Report**.
7. In the **Report Selection** dialog box, select the report that you want to view, print, or export.
8. According to your needs, do any of the following:

To	Do this
View the report	• Click **View**. The **Tekla EPM Report Viewer** opens.
Print the report	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK**.
Export the report	a. Click **Export**.

To	Do this
	b. In the **Export Format** list, select an export format. c. Click **Browse**. d. Browse to the location where you want to save the exported file, and click **Save**. e. Modify the file name according to your needs. f. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box. g. If you want to open the file after exporting it, select the **Open Exported Document** check box. h. Click **Export**.

9. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

View the material value on a specific date

1. In the menu, select **Valuation** --> **Valuation by Date** .

   The **Inventory Valuation** dialog box opens, showing the valuation of material in stock and on order on the current date.
2. In the **Date** list, select the date whose inventory valuation you want to view.
3. Click **OK**.

   The valuation on the bottom of the dialog box updates.
4. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

View the value from an archive file

1. In the menu, select **Valuation** --> **Valuation from Archive** .
2. In the **Open** dialog box, browse to find and click to select the archive file that you want to use.
3. Click **Open**.
4. In the **Select** dialog box, select if you want to view inventory reports or inventory location reports.

5. In the **Report Selection** dialog box, select the report that you want to view, print, or export.
6. According to your needs, do any of the following:

To	Do this
View the report	• Click **View**. The **Tekla EPM Report Viewer** opens.
Print the report	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK**.
Export the report	a. Click **Export**. b. In the **Export Format** list, select an export format. c. Click **Browse**. d. Browse to the location where you want to save the exported file, and click **Save**. e. Modify the file name according to your needs. f. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box. g. If you want to open the file after exporting it, select the **Open Exported Document** check box. h. Click **Export**.

7. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

View the transaction history in the Inventory module

Use the **Transaction History** dialog box to view all transactions made in the **Inventory** dialog box. You can also view further transaction details and item history, and view or print different transaction history reports.

View the transaction history of an item

1. In either the **Inventory** or **Inventory History** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Transaction History**.

   The **Transaction History** dialog box opens with the **Transaction List** tab open.
3. To filter the displayed transactions, use the fields in the **Filters** section of the dialog box:
   a. Click **Edit** next to a filtering option. The available filtering criteria are the transaction date, the user that made the transaction, the transaction type, and the operation type.
   b. Do one of the following:
      - For transaction date, enter the start and end dates to define a range within which the transactions have taken place.
      - For user, transaction type, and operation type, use the arrow buttons to move the desired items to the **Included** list.
   c. Click **OK**.

      To view all transactions again, click **Reload**.
4. To view more information about a transaction, do the following:
   a. Click to select the transaction on the **Transaction List** tab.
   b. Click the **Transaction Details** tab to view the details of the selected transaction.
   c. Click the **Item History** tab to view the item history of the selected transaction.

According to your needs, see any of the following instructions:

Find a transaction by transaction number

1. On the **Transaction List** tab, click **Find Transaction #**.
2. Enter the transaction number in the field.
3. Click **OK**.

The transaction with the selected transaction number is selected on the **Transaction List** tab.

Create transaction history reports

1. Open the **Reports** tab.

2. To only include specific items in the transaction history report, click **Edit** next to a filtering option.
3. Do one of the following:
   - For dates, enter the start and end dates to define a range within which the transactions have taken place.
   - For other filter criteria, use the arrow buttons to move the desired items to the **Included** list.
4. Click **OK**.
5. Click **Make Report**.
6. In the **Report Progress** dialog box, select the report that you want to view or print.
7. Do any of the following:

To	Do this
View the report	• Click **View**.
Print the report	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. In the **Select Printer** dialog box, click a printer to select it. c. Click **Print**.

View all changes in the transaction history

Tekla EPM records every change made in the system. This is useful because you can view all changes made in the transaction history of items in a purchase order. You can then filter the information to see changes made by a particular user or on a particular date. If necessary, you can also print the list of changes.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **List Of Changes**.
3. In the **Report Filter** dialog box, do any of the following according to your needs:

To	Do this
Filter changes by user	a. Click **Edit** on the right side of the **User** section. b. Click the arrow buttons to move the users whose changes you want to view to the **Included** list. c. Click **OK**.

To	Do this
Filter changes by date	a. Click **Edit** on the right side of the **Date** section. b. Enter the start (**Min**) and end (**Max**) dates. c. Click **OK**.

4. Click **Make Report**.
5. In the **Report Progress** dialog box, do any of the following according to your needs:

To	Do this
View the list of changes	• Click **View**.
Print the list of changes	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK**.

6. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

View and print TFS reports

Use the **TFS - Reports Only** command to view and print reports for items that have been or could be taken from stock. TFS reports show the cut details, but no items are actually cut or taken from stock when you use the **TFS - Reports Only** command.

1. In the lower navigation tree of the **Inventory** dialog box, select a job number.

   Only the items within the selected job are displayed in the display area.
2. Click the **Inventory** ribbon tab.
3. In the menu, select **Production Control** --> **TFS - Reports Only** .
4. In the **TFS** dialog box, click **Reports**.
5. In the **Report Progress** dialog box, select the report that you want to view or print.
6. According to your needs, do any of the following:

To	Do this
View the report	• Click **View**

To	Do this
Print the report	a. Change the number of printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK**.

7. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

See also

Take material from stock and return material to stock (page 36)

Take selected materials from stock (page 38)

View, print, and export inventory reports

You can create different inventory reports, such as subtotal reports, shape summaries, or receiving tickets.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.
3. In the **Inventory Report Filters** dialog box, select either the **Inventory Report** or **Inventory Location Report** option according to your needs.
4. To only include specific items in the report, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, click the arrow buttons to move the items that you want to include in the report to the **Included** list.
6. Click **OK**.
7. If you want to view the inventory situation of a previous date in the reports, do the following:
   a. Click **From Archive**.
   b. Select the archive date and time in the applicable lists.
   c. Click **OK**.
8. To view barcode audit reports in the **Report Selection** dialog box, select the **Barcode Audit** check box.
9. Click **Make Report**.
10. In the **Report Selection** dialog box, click the report that you want to view, print, or export.

According to your needs, see one of the following sets of instructions.

View inventory reports

1. Click **View**.

   The **Tekla EPM Report Viewer** dialog box opens, displaying the selected report.

2. In **Tekla EPM Report Viewer**, do any of the following according to your needs:

To	Do this
Move between pages	• Click the arrows at the top of **Tekla EPM Report Viewer**.
Go to a specific page of the report	• Type the page number in the empty field at the top **Tekla EPM Report Viewer**.
Find a text in the report	a. Click the binocular icon. b. In the blank field, type the text that you want to find. c. Click **Find Next**. Any matching text is highlighted with a red box.
Zoom in or out	• Click the magnifying glass icon and select the zoom value in the list.

Print inventory reports

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. In the **Select Printer** dialog box, click a printer to select it.
4. Click **OK**.

Export inventory reports

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. Modify the file name according to your needs.

6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

The report is saved to the selected location.

1.8 Import and export inventory information

You can import inventory information or a cut list to Tekla EPM, or export inventory information from Tekla EPM to KSTK, ProNest, Timberline, and XML format.

For more information, see the following links:

Export inventory information to the KSTK format (page 60)

Export inventory transactions to Timberline (page 60)

Import inventory information from an HTML file (page 62)

Export inventory information to the KSTK format

Use the **Export to KSTK** command to save inventory information in the KSTK format.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Export to KSTK**.
3. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
4. If necessary, modify the file name.
5. Click **Save**.

   A message opens, showing where the inventory information was saved.
6. Click **OK** to close the message.

Export inventory transactions to Timberline

Use the **Export Inventory Transactions to Timberline** command to export inventory information to the Timberline accounting software. Note that Timberline must be open, so that it can receive the inventory information.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.

2. In the menu, select **Export Inventory Transactions to Timberline**.

   The **Export Inventory Transactions to Timberline** dialog box opens.

3. In the **Export From Transaction #** and **To (leave blank for all)** fields, enter the numbers of the first and last transactions that you want to export.

4. In the **Job # Export Option** list, select how you want the job number to be exported.

5. Enter the general ledger code.

6. To not export material that has been received directly to inventory history, select the **Ignore material received directly to inventory history** check box.

7. Click **Export Transactions**.

The selected transactions are exported to Timberline.

Synchronize inventory information with ProNest

Use the **Sync with ProNest** command to synchronize Tekla EPM inventory information with ProNest and update the cut lists in ProNest. We recommend that you synchronize the two software regularly.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.

2. In the menu, select **Export** --> **Sync with ProNest** .

   The inventory information in Tekla EPM is exported to ProNest to synchronize the two software. You can view the process in the **Status** dialog box.

3. When the synchronization process is completed, click **OK** to close the **Status** dialog box.

You can now view the inventory information exported from Tekla EPM in ProNest.

Export inventory information to XML

Use the **Export to XML** command to save inventory information in an XML file.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.

2. In the menu, select **Export** --> **Export to XML** .

3. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.

4. If necessary, modify the file name.

5. Click **Save**.

   The **Status** dialog box opens, showing the status of the export process.

6. When the export is completed, click **OK** to close the **Status** dialog box.

The file is saved to the location you selected.

Archive jobs

Use the **Archive Jobs** command to export jobs from **Inventory History** and save them as KSTK or TXT files.

1. In the **Inventory History** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Export** --> **Archive Jobs** .

   The **Archive Jobs** dialog box opens.

3. Click the arrow buttons to move the jobs that you want to archive to the **Included** list.
4. If you want to delete the jobs from inventory history after archiving them, select the **Purge Archived Jobs** check box.
5. Click **OK**.
6. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.

7. If necessary, modify the file name.
8. If necessary, select another file format in the **Save as type** list.
9. Click **Save**.

   A message opens, showing you the location and the file where the archived jobs have been saved.

10. Click **OK** to close the message.

Import inventory information from an HTML file

Use the **Inventory From HTML** command to import inventory information from an HTML file to Tekla EPM.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Import** --> **Inventory From HTML** .
3. In the **Open** dialog box, browse to find and select the HTML file that you want to import.

4. Click **Open**.

The inventory information is imported to Tekla EPM.

Import ProNest cut lists to Tekla EPM

You can import cut lists available in the ProNest nesting software to Tekla EPM. By importing cut lists, you receive information on the scrap of a ProNest nesting process to inventory.

Before sending cut lists to Tekla EPM, send the nest to CNC in ProNest.

1. In the **Inventory** dialog box, click the **Inventory** ribbon tab.
2. In the menu, select **Import** --> **ProNest Cut List** .

   Tekla EPM imports the cut lists that are available in ProNest.
3. When the import is completed, click **Open Import Log** to view, print, or save the import log.
4. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Once a cut list is imported, it can be cut in Tekla EPM. This way, you can remove the used plate from inventory and add the proper scrap.

See also

Synchronize inventory information with ProNest (page 61)

Index