WMS: Missions & Tasks

SYSPRO 8

Reference Guide

SYSPRO™

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WMS: Missions and Tasks

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Exploring

Where it fits in?

The **Missions and Tasks** feature lets you create a work-to-list for queuing and moving inventory within a warehouse. This gives warehouse managers greater work allocation control and visibility.

A mission (allocated to an employee or team) can be created for inventory putaway, sales order pick or cycle count transactions. Once missions and tasks are assigned to the employee or team they can be serviced using the Espresso **WMS Missions & Tasks** application or the **WHM Review Mission Tasks** program.

Operators see their tasks on a mobile device. As the stock is physically moved and the task completed, the system gets updated in real time. Once all tasks are marked as done, the mission can be completed.

Navigation

The programs related to this feature are accessed from the **Program List** pane of the SYSPRO menu:

- *Program List > Inventory*

Terminology

Bin

This is typically a container or shelf in a warehouse that lets you keep track of stored inventory items.

Each bin is assigned a type to indicate its basic flow of activities. This helps define the way in which it is used and to prevent incorrect use (e.g. dispatching inventory from a WIP bin, or consuming products that have not yet been receipted).

Cycle count

This refers to an inventory auditing procedure whereby a small subset of inventory items (or specific locations) are designated to be counted on a specified cycle.

The information derived from the cycle count can be used to determine the accuracy of stock levels within the entire warehouse (e.g. if discrepancies are found between actual and system stock levels, similar variances may be expected in other areas of the warehouse).

Inventory putaway

A putaway refers to the process of moving inventory between bins and warehouses. The initial putaway would be from the receiving zone to the storage location in a warehouse. Subsequent Putaway transactions include bin and goods in transit warehouse transfers.

Lost and found warehouse (L&F)

This is the warehouse optionally configured to store variances arising during picking or cycle counting.

The quantity that is short is moved to the lost and found warehouse at the time the pick line or entire pick is completed and set to C - PICKED.

Items can be retrieved from the L&F warehouse during cycle counting using the **Lost and Found Warehouse Review** program.

The lost and found warehouse is only enabled if a warehouse is defined at the LOST AND FOUND WAREHOUSE setup option and PROCESS TO LOST AND FOUND WAREHOUSE is selected at the ACCOUNTING FOR SHORTAGES option (**Warehouse Maintenance**) .

Sales order picking

This is the process of finding and extracting products from a warehouse bin to fulfill customer sales orders.

Warehouse

Within SYSPRO, a warehouse represents an actual warehouse containing your inventory items (i.e. a physical warehouse) or a grouping of your inventory according to specific characteristics of the item (i.e. a logical warehouse).

> **FOR EXAMPLE:**
>
> You may want to split your inventory raw materials and finished goods into different logical warehouses even though they are located in the same physical warehouse.

You maintain warehouses using the **Warehouse Maintenance** program.

Mission and task

A mission (allocated to an employee or team) can be created for inventory putaway, sales order pick or cycle count transactions. Once missions and tasks are assigned to the employee or team they can be serviced using the Espresso **WMS Missions & Tasks** application or the **WHM Review Mission Tasks** program.

Operators see their tasks on a mobile device. As the stock is physically moved and the task completed, the system gets updated in real time. Once all tasks are marked as done, the mission can be completed.

Starting

Prerequisites

To use this feature, the following setup option(s) must be enabled:

Inventory Configuration

Setup Options > Configuration > Distribution > Inventory

- Multiple bins
- Fixed bins
- Associate serials by bin
- WMS missions options
    - Enable for cycle counting
    - Enable for sales order picking
    - Enable for putaways

    > The WMS missions options can be enabled separately, i.e. they work independently.

    - Show Warehouses (hyperlink)
        - Accounting for shortages
            - Process as stock adjustments
            - Process to lost and found warehouse
        - Lost and found warehouse

Warehouse Maintenance

Program List > Inventory > Setup

- WMS control
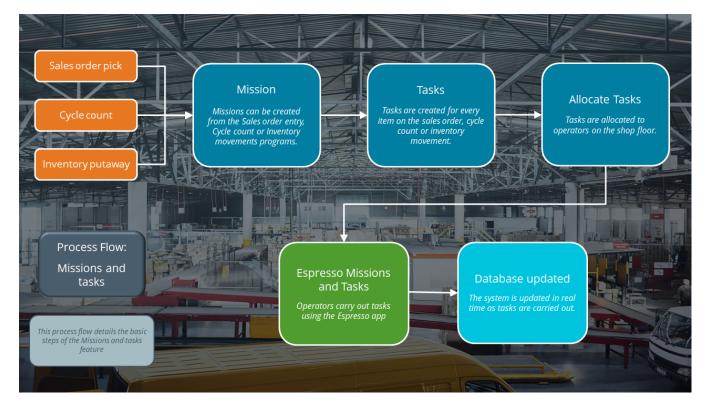   - Accounting for shortages
    - Lost and found warehouse

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).

- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.

- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **eSignature Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.

- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).

- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Using

Process

Process Flow: Missions and tasks

This process flow details the basic steps of the Missions and tasks feature

Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

Setup programs

WHM Mission Teams Maintenance

Program List > Inventory > Warehouse Management > Missions and Tasks > Setup

This program lets you allocate a team to a mission.

WHM Team Employee Maintenance

Program List > Inventory > Warehouse Management > Missions and Tasks > Setup

This program lets you add and maintain the employees that form part of the teams to which missions can be allocated.

WHM Teams Maintenance

Program List > Inventory > Warehouse Management > Missions and Tasks > Setup

This program lets you add and maintain the teams that can be allocated to missions.

Operator Maintenance

SYSPRO Ribbon bar > Setup > Operators

The **Employee** field lets you link the SYSPRO operator to an employee who can be part of a team that can be allocated to a mission.

This link is required to filter the list of tasks according to the SYSPRO operator, which in turn limits the tasks the logged on Espresso operator can perform.

Transaction Processing programs

Inventory Movements

Program List > Inventory > Transaction Processing

Two new fields **Put-Away - Bin Transfer** and **Put-Away – Warehouse Transfer** let you classify the inventory movement transaction as a putaway that can be assigned to a shop floor operator using the **WHM Review Mission Tasks** program.

SO Picking Options

The **Create Mission and tasks** option lets you create a mission from the sales order pick.

Period End programs

Whm Mission Purge

Program List > Inventory > Warehouse Management > Missions and Tasks

This program lets you delete completed and canceled missions, i.e. remove the mission data from the `WhmMission` and `WhmMissionTasks` database tables.

Batch programs

Cycle Count Maintenance

Program List > Inventory > Cycle Counting System > Transaction Processing

The **Create Mission and tasks** option lets you create a mission from the cycle count.

Report programs

Mission Tasks

Program List > Inventory > Warehouse Management > Missions and Tasks > Reports

This report displays the information for missions as well as the tasks allocated to these.

Changes to existing reports

The **Employee** field was added to the following reports:

- Detailed List of Operators
- Simplified List of Operators

Query programs

WHM Mission Query

Program List > Inventory > Warehouse Management > Missions and Tasks

This program lets you query mission and task information. The tasks associated with the mission are displayed in the list view.

WHM Review Mission Tasks

Program List > Inventory > Warehouse Management > Missions and Tasks

This program lets you allocate a mission to an employee as well as review missions and tasks.

Warehouse Bin Query

Program List > Inventory > Warehouse Management

You can create a putaway transaction for a stock item by selecting the **Add Putaway** hyperlink in the list view.

Browse programs

WHM Team Browse

Program List > Inventory > Warehouse Management > Missions and Tasks > Browses

This program lets you browse the teams that can be allocated to missions.

WHM Mission Browse

Program List > Inventory > Warehouse Management > Missions and Tasks > Browses

This program lets you browse all missions and displays their statuses and sources (picking, cycle-counting or inventory putaway).

WHM Teams Employee Browse

Program List > Inventory > Warehouse Management > Missions and Tasks > Browses

This program lets you view the employees that belong to a team.

Affected business objects

Setup objects

WHM Mission Team Maintenance

The WHM MISSION TEAM MAINTENANCE[1] business object lets you allocate a mission to a team.

Teams Maintenance

The TEAMS MAINTENANCE[2] business object lets you add, change and delete teams that can be allocated to missions.

WHM Mission Team Employee Maintenance

The WHM MISSION TEAM EMPLOYEE MAINTENANCE[3] business object lets you add, change or delete employees that form part of the teams to which missions can be allocated.

Query objects

WHM Mission Query

The WHM MISSION QUERY[4] business object lets you query a mission and the tasks associated with that mission from the WhmMission table.

WHM Completed Missions Query

The WHM COMPLETED MISSIONS QUERY[5] business object lets you query all completed missions and tasks.

WHM In Progress Missions Query

The WHM IN PROGRESS MISSIONS QUERY[6] business object lets you query all missions from the WhmMission table that are still in progress (i.e. missions that are not canceled or completed).

WHM Missions Query

The WHM MISSIONS QUERY[7] business object lets you query the missions in the WhmMissionTasks and WhmMission tables and displays their statuses and sources (picking, cycle-counting or inventory putaway). It is called from the **WHM Review Mission Tasks** program and loads the results in the list view.

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[1]Business object: WHMSMT
[2]Business object: WHMSTM
[3]Business object: WHMSTE
[4]Business object: WHMQMS
[5]Business object: WHMQCM
[6]Business object: WHMQPM
[7]Business object: WHMQSM

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