



Collateral Item

Overview

The WAREHOUSE MGMT module Collateral Item process provides the ability to associate one or more collateral items with its Parent Item (STOCK NBR), which integrates into the responsibility of maintaining the User Catalog that is associated with the Logistics Program.

The process views what items are associated with another item. For example, when someone requests to be issued skis, the warehouse clerk uses this process to view what collateral items may need to be issued to outfit the requester such as boots, poles, bindings, etc.

Navigation

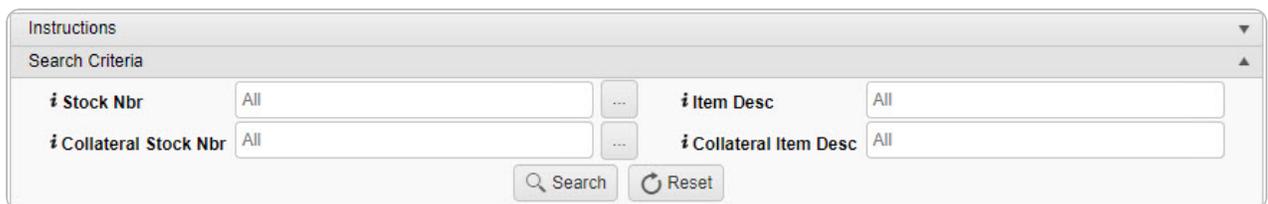
CATALOG MGMT > Collateral Item > Collateral Item page

Procedures

Search for a Collateral Item

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting  at any point of this procedure returns all fields to the default "All" setting.

1. In the Search Criteria box, narrow the results by entering one of the following optional fields.



The screenshot shows a 'Search Criteria' form with the following fields and controls:

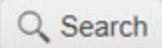
- Stock Nbr:** A text input field with 'All' entered. To its right is an information icon (i) and a dropdown menu (three dots).
- Collateral Stock Nbr:** A text input field with 'All' entered. To its right is an information icon (i) and a dropdown menu (three dots).
- Item Desc:** A text input field with 'All' entered. To its left is an information icon (i).
- Collateral Item Desc:** A text input field with 'All' entered. To its left is an information icon (i).
- At the bottom of the form are two buttons: 'Search' (with a magnifying glass icon) and 'Reset' (with a circular arrow icon).

- Use  or  to assist with the STOCK NBR entry. This is a 15 alphanumeric character field.
- Use  or  to assist with the COLLATERAL STOCK NBR entry. This is a 15 alphanumeric character field.





- Enter the ITEM DESC, using  to assist with the entry. *This is a 256 alphanumeric character field.*
- Enter the COLLATERAL ITEM DESC, using  to assist with the entry. *This is a 256 alphanumeric character field.*

2. Select  . *The Search Results are displayed in the Collateral Item grid.*

Collateral Item		+ Add	Grid Options				
	Stock Nbr	Item Desc	Mgmt Cd	Primary ...	Remarks		
	8465004313776	SKIS	A - Serial Number Managed				
	846501S987693	TRAIN PACK ASSEMBLED	B - Bulk Managed				

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Update a COLLATERAL STOCK NBR

1. Click  next to the desired Collateral Item record. *The record expands to display the COLLATERAL STOCK NBR entries.*

Collateral Item		+ Add	Grid Options																												
	Stock Nbr	Item Desc	Mgmt Cd	Primary ...	Remarks																										
	8465004313776	SKIS	A - Serial Number Managed																												
<table border="1"> <thead> <tr> <th colspan="2">Collateral Item</th> <th>+ Add</th> <th>Save Changes</th> <th>Cancel</th> <th>Grid Options</th> <th colspan="2"></th> </tr> <tr> <th></th> <th>Collateral Stock Nbr</th> <th>Collateral Item Desc</th> <th>Collateral Mgmt Cd</th> <th>Collateral Stocking UI</th> <th>Collateral Qty</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td></td> <td>3040004037879</td> <td>SHOE,SKIS</td> <td>A - Serial Number Managed</td> <td>EA - Each</td> <td>2</td> <td colspan="2"></td> </tr> </tbody> </table>								Collateral Item		+ Add	Save Changes	Cancel	Grid Options				Collateral Stock Nbr	Collateral Item Desc	Collateral Mgmt Cd	Collateral Stocking UI	Collateral Qty				3040004037879	SHOE,SKIS	A - Serial Number Managed	EA - Each	2		
Collateral Item		+ Add	Save Changes	Cancel	Grid Options																										
	Collateral Stock Nbr	Collateral Item Desc	Collateral Mgmt Cd	Collateral Stocking UI	Collateral Qty																										
	3040004037879	SHOE,SKIS	A - Serial Number Managed	EA - Each	2																										
	846501S987693	TRAIN PACK ASSEMBLED	B - Bulk Managed																												

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2. Select  under the Collateral QTY column to change the quantity. *The field changes to allow an entry.*





Help Reference Guide

Collateral Item + Add Grid Options

Stock Nbr ↑	Item Desc	Mgmt Cd	Primary ...	Remarks
<input type="button" value="X Delete"/>	8465004313776	SKIS	A - Serial Number Managed	

+ Add ✓ Save Changes Cancel Grid Options

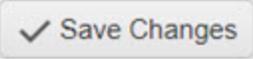
Browse...	Collateral Stock Nbr ↑	Collateral Item Desc	Collateral Mgmt Cd	Collateral Stocking UI	Collateral Qty
<input type="button" value="X Mark Deleted"/>	3040004037879	SHOE,SKIS	A - Serial Number Managed	EA - Each	<input type="text" value="2"/>

50 items per page 1 - 1 of 1 items

<input type="button" value="X Delete"/>	8465019987693	TRAIN PACK ASSEMBLED	B - Bulk Managed	
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50 items per page 1 - 2 of 2 items

3. Enter or use  to choose the Collateral QTY.

4. Select . *The row is saved and becomes read-only.*





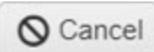
Add a Collateral Item

Navigation

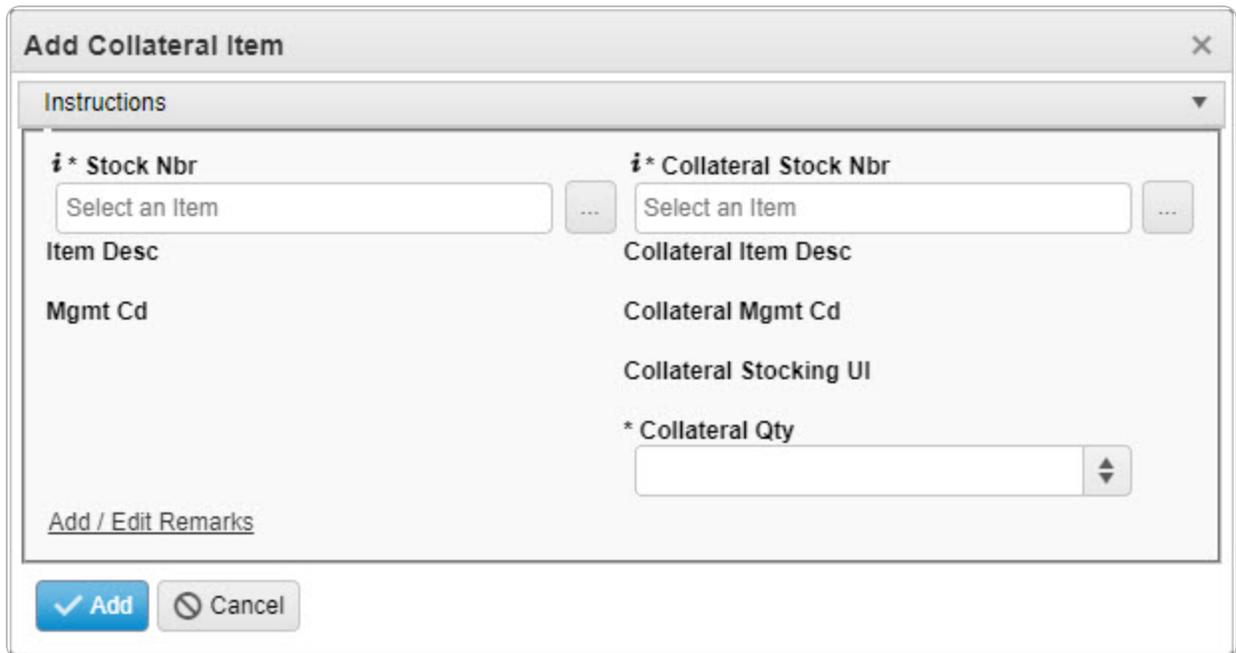
CATALOG MGMT > Collateral Item >  > Add Collateral Item pop-up window

Procedures

Add a Collateral Item

Selecting  at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

1. Select . The **Add Collateral Item** pop-up window appears.



The screenshot shows a window titled "Add Collateral Item" with a close button (X) in the top right corner. Below the title bar is a dropdown menu labeled "Instructions". The main area contains two columns of fields. The left column has: "i * Stock Nbr" with a text box containing "Select an Item" and a browse button "..."; "Item Desc"; and "Mgmt Cd". The right column has: "i * Collateral Stock Nbr" with a text box containing "Select an Item" and a browse button "..."; "Collateral Item Desc"; "Collateral Mgmt Cd"; "Collateral Stocking UI"; and "* Collateral Qty" with a spinner box. At the bottom left of the form area is a link "Add / Edit Remarks". At the bottom of the window are two buttons: a blue "Add" button with a checkmark and a grey "Cancel" button with a stop sign.

2. Enter the STOCK NBR, or use  to browse for the entry. The ITEM DESC and MGMT CD automatically populate.





- Enter the COLLATERAL STOCK NBR, or use  to browse for the entry. *The COLLATERAL ITEM DESC, COLLATERAL MGMT CD, and COLLATERAL STOCKING UI automatically populate.*
- Enter or use  to choose the Collateral QTY.
- Select . *The new Collateral Item record is added to the top of the Collateral Item grid (highlighted in green).*

Collateral Item						
	Stock Nbr ↑	Item Desc	Mgmt Cd	Primary ...	Remarks	
	6510014999285	WOUND PACK,HEMOSTATIC TREATMENT	B - Bulk Managed		BPG Test	
	846501S987693	TRAIN PACK ASSEMBLED	B - Bulk Managed			

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Add a COLLATERAL STOCK NBR

- Click  next to the desired Collateral Item record. *The record expands to display the COLLATERAL STOCK NBR entries.*

Collateral Item																											
	Stock Nbr ↑	Item Desc	Mgmt Cd	Primary ...	Remarks																						
	8465004313776	SKIS	A - Serial Number Managed																								
<table border="1"> <thead> <tr> <th colspan="7">Collateral Item</th> </tr> <tr> <th></th> <th>Collateral Stock Nbr ↑</th> <th>Collateral Item Desc</th> <th>Collateral Mgmt Cd</th> <th>Collateral Stocking UI</th> <th>Collateral Qty</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td>3040004037879</td> <td>SHOE,SKIS</td> <td>A - Serial Number Managed</td> <td>EA - Each</td> <td>2</td> <td></td> </tr> </tbody> </table>							Collateral Item								Collateral Stock Nbr ↑	Collateral Item Desc	Collateral Mgmt Cd	Collateral Stocking UI	Collateral Qty			3040004037879	SHOE,SKIS	A - Serial Number Managed	EA - Each	2	
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	846501S987693	TRAIN PACK ASSEMBLED	B - Bulk Managed																								

50 items per page 1 - 1 of 1 items

50 items per page 1 - 2 of 2 items

- Select . *A new blank row appears, to insert a new entry.*





Help Reference Guide

Collateral Item + Add Grid Options

Stock Nbr ↑	Item Desc	Mgmt Cd	Primary ...	Remarks
8465004313776	SKIS	A - Serial Number Managed		

+ Add Save Changes Cancel Grid Options

Browse...	Collateral Stock Nbr ↑	Collateral Item Desc	Collateral Mgmt Cd	Collateral Stocking UI	Collateral Qty
...					1
	3040004037879	SHOE,SKIS	A - Serial Number Managed	EA - Each	2

50 items per page

1 - 2 of 2 items

3. Enter the COLLATERAL STOCK NBR, or use  to browse for the entry. *This is a 15 alpha-numeric character field.*

Note



If an incorrect COLLATERAL STOCK NBR is selected, use  again to browse and select the correct COLLATERAL STOCK NBR.

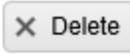
4. Select  to change the default quantity in the Collateral QTY column. *Enter the new quantity, or use  to change the quantity.*
5. Select . *The row is saved and becomes read-only.*





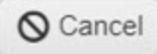
Delete a Collateral Item

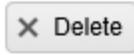
Navigation

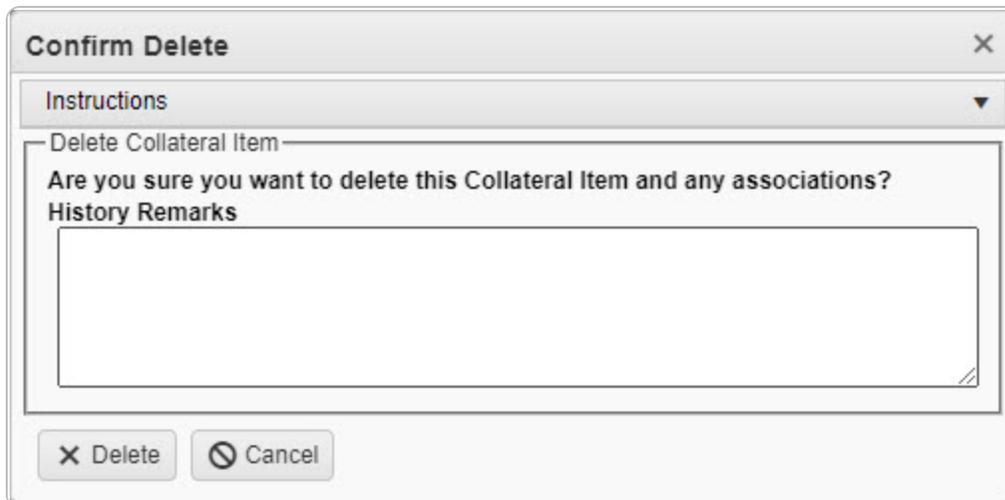
CATALOG MGMT > Collateral Item >  (desired record) >  > Confirm Delete (Delete Collateral Item) pop-up window

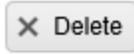
Procedures

Delete a Collateral Item

Selecting  at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

1. Select . The **Confirm Delete (Delete Collateral Item)** pop-up window appears.



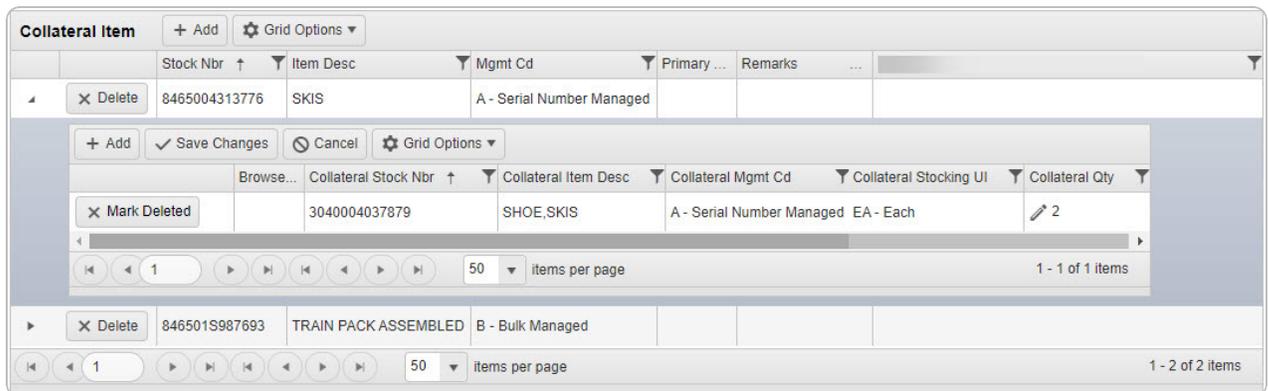
2. Select . The Collateral Item is removed from the grid.



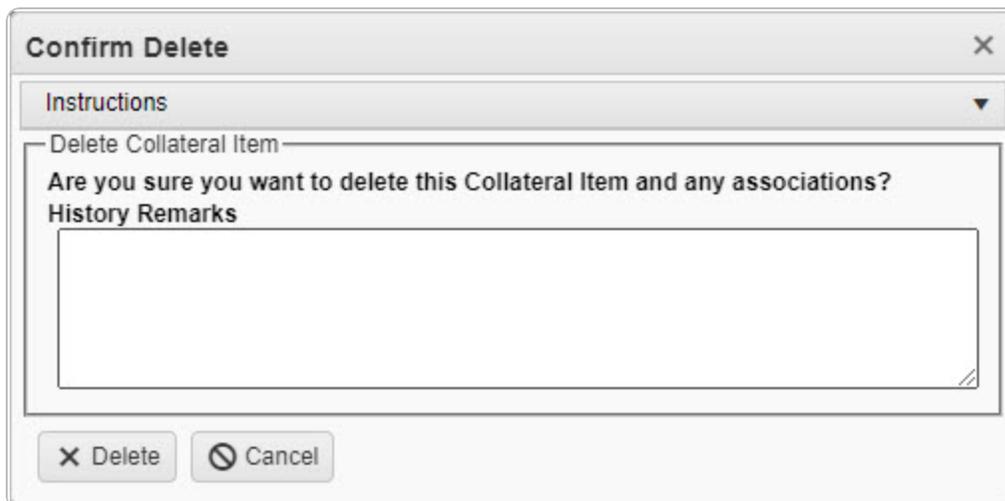


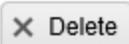
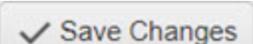
Delete a COLLATERAL STOCK NBR

1. Click  next to the desired Collateral Item record. *The record expands to display the COLLATERAL STOCK NBR entries.*



2. Select . *The **Confirm Delete** pop-up window appears.*



3. Select . *The pop-up window closes and the entry is grayed out.*
4. Select . *Entries marked for deletion are removed from the Collateral Item record.*

