Trainers and Users Guide to Corporate Management Inventory Inquiry

Christopher Dixon
Loyola University Chicago

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TRAINERS
AND
USERS GUIDE
TO
CORPORATE MANAGEMENT INVENTORY INQUIRY

A THESIS SUBMITTED TO
THE FACULTY OF LOYOLA UNIVERSITY OF CHICAGO
IN CANDIDACY FOR THE DEGREE OF
MASTERS OF ARTS

DEPARTMENT OF CURRICULUM AND HUMAN RESOURCES DEVELOPMENT

BY
CHRISTOPHER DIXON

CHICAGO, ILLINOIS
MAY 1991
ACKNOWLEDGEMENTS

Thanks are due to the director of the committee, Dr. Todd Hoover, and member of the committee, Dr. Robert Cienkus. Their assistance and guidance were invaluable in the preparation of this thesis. In addition, graduate assistant Lucia Gagnon and the staff members of the Graduate School of Loyola University of Chicago, as well as, the needs analysis criterions of the corporate offices of TC Manufacturing, were essential to the compilation of the enclosed data. Finally, the confidence and support of L.D. Keeling, friends and relatives was highly appreciated.
The author, Christopher Dixon, was born on August 30, 1959, in Wilson, North Carolina.

In August, 1977, Mr. Dixon entered Atlantic Christian College in Wilson, North Carolina. In 1978, he transferred to Tennessee State University in Nashville, Tennessee to continue his undergraduate education. In 1981, he enrolled in the University of North Carolina, Charlotte, North Carolina, where he received a Bachelor of Arts degree in Orchestral Performance, with a minor in Research Methods, in May of 1983.

Upon graduation from the University of North Carolina, Charlotte, Mr. Dixon auditioned for the United States Marine Corps Bands. He attended the Naval Amphibious Base School of Music, Little Creek, Norfolk, Virginia, where he received certification in Military Music Performance and Office Administration Management. Mr. Dixon was then stationed with the First Marine Division Band, Camp Pendleton, California. This was followed by an extensive performance engagement with the Third Marine Amphibious Force Band, in Okinawa, Japan.

Mr. Dixon enrolled in Loyola University of Chicago, Chicago, Illinois in the fall of 1986. He received the degree of Master of Arts in Adult and Corporate Instructional Management from Loyola University in May of 1991.
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Introduction:

The pages which follow address the questions shown below which pertain to the creation and use of this training document.

1) Overview, purpose, and need of this project.

2) The reporting order of MIS within the corporate structure of TC Manufacturing Company, Inc.

3) Developmental factors of this project.

4) Trainers/Users guide document design.

5) The intended audience for the use of this document.
1) Overview, purpose, and need of this project.

**Overview:**

The Inventory Master maintains manufacturing inventory records for finished goods, sub-assemblies, purchased components, and raw materials. All inventory activity is entered interactively and inventory status is updated on-line. Up to the minute inventory status is available through the display terminal.

**Purpose:**

The purpose of this training guide is to provide the Shipping/Materials Management offices with a document, which will be used for the following:

1) To train management personnel on the use of the Inquiry options of Inventory Control.

2) To provide a reference guide for current managers and operators which covers practical user applications interactions of the Inventory Control module.

3) To provide a "Train the Trainer" document which will be used as a model for developing other training aids based on TEC software and DEC hardware.

**Need:**

TC Manufacturing has no documented training materials for the daily user. In order to train new personnel or to re-train users to new options requires either Systems Management or Programmer Analyst interaction. This document will allow management within the designated area to train personnel on specific option interaction and/or on all user Inquiry features.
2) The reporting order of MIS within the corporate structure of TC Manufacturing Company, Inc.

TC Manufacturing Company, founded in 1941 is comprised of four distinct divisions. The Unit Dose Laboratories, located in Rockford, Illinois and Tampa, Florida, are pharmaceutical packaging operations. The Paksher Division, located in Kilgore, Texas, is primarily a plastic bag making/distributing operation. The Canadian Division, Tapecoat of Canada, located in Rexdale, Ontario, operates as a liaison to the Tapecoat Company located in Evanston, Illinois. Both the Tapecoat Company of Canada and the Tapecoat Company of Evanston specialize in corrosive protective coverings.

These divisions have their own operating system(s) and an individual who acts as the onsite Data Processing Supervisor. However, division wide there is only one Manager of Information Systems, (MIS Director). This position is within the corporate offices which are located in Evanston, Illinois. The MIS Director serves multiple roles in the information systems area. The primary duties are to ensure the fit of software/hardware to the needs of each division, to serve as a consultant for contractual agreements and to effectively monitor projection plans for system(s) expansion/capacity requirements.
The following is an organizational chart of how the MIS Department interacts with the divisions mentioned previously.

Organizational Chart

Board of Directors

CEO

President

Sr. VP. TC

Corp VP. & CFO

VP. Sales

MIS.

DIR.

VP. R&D

Shipping Manager

Accounting:

UDL-Florida

UDL-Rockford

TC of Canada

Texas Division

Sales Reps

Consultant

Lab Personnel
3) Developmental factors of this project.

The factors involved in the choice of this particular area of information systems software for development, are as follows:

A) Corporate users of the inventory control module require accurate and concise information as quickly as possible. This information, is most easily discerned through the inquiry applications of the inventory control modules.

B) A document with the intent of training, either a non-user or an experienced user of other applications within the software did not exist.

C) System Manuals were/are written for persons with a greater understanding of software development and interaction than the average user would be required to have to perform day to day tasks.

D) To train each individual on each task involved in using the inventory inquiry modules, would have become overly time consuming for the personnel in the MIS area. Therefore, training strategic individuals to monitor and administer the application practices of this document has the best overall potential for success.

The course work of CHRD 440, taken during the Fall Semester 1987, emphasized the development and creation of Computer Assisted Instruction concepts. This course provided an introduction to authoring tools and tasks logic, as well as needs analysis, which have continually been employed in the development and creation of instructional design documents I have developed to date.
4) Trainers/Users guide document design.

This Users Training Guide has been designed to incorporate the following hierarchical levels of Bloom’s Taxonomy.

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<thead>
<tr>
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<td>Evaluation</td>
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<tr>
<td>Synthesis</td>
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<tr>
<td>Analysis</td>
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<tr>
<td>Application</td>
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<tr>
<td>Comprehension</td>
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<td>Knowledge</td>
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**Session 1.1 Module Practice (Application Log-on)**

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Synthesis</th>
<th>Analysis</th>
<th>Application</th>
<th>Comprehension</th>
<th>Knowledge</th>
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<table>
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<tr>
<th>Major Area 2.1</th>
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<tbody>
<tr>
<td>Evaluation</td>
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<tr>
<td>Synthesis</td>
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<tr>
<td>Analysis</td>
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<td>Application</td>
</tr>
<tr>
<td>Comprehension</td>
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<tr>
<td>Knowledge</td>
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</tbody>
</table>

**Session 2.1 Stock Status Inquiry (Terminology)**

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Synthesis</th>
<th>Analysis</th>
<th>Application</th>
<th>Comprehension</th>
<th>Knowledge</th>
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**Session 2.2 Module Practice (Stock Status Inquiry Accessing Data)**

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<th>Synthesis</th>
<th>Analysis</th>
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<th>Knowledge</th>
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<table>
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<tr>
<th>Major Area 3.0</th>
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</thead>
<tbody>
<tr>
<td>Evaluation</td>
</tr>
<tr>
<td>Synthesis</td>
</tr>
<tr>
<td>Analysis</td>
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<tr>
<td>Application</td>
</tr>
<tr>
<td>Comprehension</td>
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<tr>
<td>Knowledge</td>
</tr>
</tbody>
</table>

**Session 3.1 & 3.2 Module Practice (Twelve Month Usage Tracking)**

<table>
<thead>
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Bloom's Taxonomy, derived from the course work of CHRD 413, taken during the Fall Semester 1987, emphasized the different methods of effective instructional methodologies. Bloom's Taxonomy was one of the instructional analysis strategies presented during the course. The verbal and visual analogies of Bloom's Taxonomy has been a basis for justification of training levels and effectiveness for all instructional design packages I have developed.

Major Area 1.0 Sessions 1.1 and 1.2 goals are to guide the inexperienced Trainer and/or User through procedures necessary to enter and exit the main menu of the application(s) software discussed. Through the guides inherent nature of application, the most prominent levels of Bloom's Taxonomy would be those of Application and Analysis. Session 1.1 does not, however, assume that knowledge and comprehension has occurred. Rather, through the process of manual application to a task, knowledge and comprehension is hoped to be gained.

Session 1.2 reiterates the basic goals of Session 1.1. However, Session 1.2 takes the Trainer and User to the level of Analysis. This is due to the User(s) having accessed informative data in an online, automated, information processing environment.
Session 2.1 is geared to the lower levels of Bloom's Taxonomy. The goal of Major Area 2.0 Session 2.1 is based in knowledge and a comprehensive reference to the definitions of visual representations.

Session 2.2 of Major Area 2.0, however, is based in the application levels of Bloom's Taxonomy. The actual access of informative data through manual interaction with the CRT, will again raise the hierarchical level of Bloom's Taxonomy to Synthesis. The formula, theoretically, would appear as follows:

\[
\text{Application} + \text{Analysis} = \text{Synthesis}
\]

(repetition of a function (repetition of a function
(interactive viewing of data ) (interactive viewing of data
(basic processes needed to attain data ) (basic processes needed to attain data
(representative to the software ) (representative to the software
(applications capabilities.) (applications capabilities.)

Based on the prior levels of the Users Training Guide, Major Area 3.0 should place the User(s) and Trainer at the highest threshold of Bloom's Taxonomy. Prior Knowledge, Comprehension, and Application processes, as well as the Analytical nature of the data as represented, has lead the User(s) and Trainer to the point of Synthesis. Evaluation of the data represented, for whatever historical, current, or long range planning tasks that may be undertaken.

The ultimate goal of any learning process is to give the individual involved a method of assimilating what has been gleaned from an experience which can be applied to other like experiences.
5) The intended audience for the use of this document.

The intended audience for the use of this document, are as follows:

A) Trainers or administrators that have had little if any interaction with the inventory inquiry module applications.

B) Users of other applications that have had little if any interaction with the inventory inquiry module applications.

C) MIS/Data Processing personnel tasked with documenting the use of other application(s) modules for training purposes.

D) Administrators with information requests based on the fields discussed within the inventor inquiry module applications.

The only pre-requisites for the use of this document is that the user be authorized or has access to an account which will allow the inventory inquiry modules applications to be accessed. The trainer or administrator should also have an account that allows exit from the software applications to VMS. This is necessary due to the tendency of users, in a training session to read and enter commands ahead of the instructors instructions. By allowing the Trainer access to an account which allows him or her to access VMS, if a user becomes locked within one of the module practices, the Trainer, may stop the user(s) process, have the user log on again and return to the point where the stall or process lock occurred.
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Session 1.1 SYSTEM ACCESS

While the inventory control module has several selections that may be used for any number of reasons, the following discusses only those options that are used on a daily informational needs basis by the offices of Shipping/Materials Management.

TRAINING SESSION 1.1 OUTLINE:

The user will do the following:

1) Log into the System.
2) Access the SYSTEM MENU.
3) Log off the System.

Note: For training purposes a generic user id, Figure 1A, has been established.

Figure 1A

Username: TECUSER
Password: TEC

Please enter your id#... 5
Please enter your password...CBD

TRAINING SESSION 1.1 MODULE PRACTICE:

Trainers Guide:

1) Ensure power is on to all terminals.
2) Have all users press the enter key.

3) Ensure all users receive the Username: /Password: /ID#.. /Password.. prompts as shown in Figure 1A above.

4) Ensure all users are on the SYSTEM MENU.
   Figure 1B (p. 19)

5) Have all users enter option $20 from the SYSTEM MENU. "LOG OFF SYSTEM"
TRAINING SESSION 1.1 MODULE PRACTICE:

**Users Guide:**

1) Note the green light, on the bottom right front of the monitor is on.

2) Press the enter key.

3) Enter Username, password, ID#, password as shown in Figure 1A. (p. 17)

4) SYSTEM MENU SYMENU. Figure 1B (p. 19)

5) Enter 20, press return.
The SYSTEM MENU, shown above, is the main menu for options provided by TEC software. For the purposes of this training guide, option #7 INVENTORY CONTROL, and option #20 LOG OFF SYSTEM, are the only two choices that should be made from this menu.

[ENTER OPTION _7_ AT THIS TIME]
Session 1.2 Item Master File Maintenance:

Item Master File Maintenance

Permits material subassembly, and finished goods items to be added, changed, or deleted. The screen displays all the information stored for each item, and any maintenance performed results in flagging that item. Each field of data for the specific item, should be checked as it is entered or revised.

The following pages contain representations of Screens within the Inventory Control module. The answers to prompts to achieve specific results are included along with a brief description of each screen.
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<thead>
<tr>
<th>Selection</th>
<th>Description</th>
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</thead>
<tbody>
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<tr>
<td>2</td>
<td>SORT ITEM MASTER FILE</td>
</tr>
<tr>
<td>3</td>
<td>PRINT ITEM MASTER LIST</td>
</tr>
<tr>
<td>4</td>
<td>POST INVENTORY ACTIVITY</td>
</tr>
<tr>
<td>5</td>
<td>POST PURCHASE ORDERS</td>
</tr>
<tr>
<td>6</td>
<td>STANDARD COST INQUIRY</td>
</tr>
<tr>
<td>7</td>
<td>STOCK STATUS INQUIRY</td>
</tr>
<tr>
<td>8</td>
<td>PRINT STOCK STATUS REPORT</td>
</tr>
<tr>
<td>9</td>
<td>PRINT INVENTORY VALUATION RPT</td>
</tr>
<tr>
<td>10</td>
<td>PRINT INVENTORY ACTIVITY JOURNAL</td>
</tr>
<tr>
<td>11</td>
<td>PR ADJ TRAN LIST</td>
</tr>
<tr>
<td>12</td>
<td>AUTO ITEM REPLACE</td>
</tr>
<tr>
<td>13</td>
<td>OPEN PO REPORT</td>
</tr>
<tr>
<td>14</td>
<td>REORG ITEM MASTER</td>
</tr>
<tr>
<td>15</td>
<td>CLR MTD SLS &amp; CST</td>
</tr>
<tr>
<td>16</td>
<td>CLR YTD SLS &amp; CST</td>
</tr>
<tr>
<td>17</td>
<td>PHYS INV</td>
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<tr>
<td>18</td>
<td>YR END PHYS INV</td>
</tr>
<tr>
<td>19</td>
<td>12-MNT USAGE</td>
</tr>
</tbody>
</table>

Selection #1, as shown in Figure 1D, accesses the ITEM MASTER FILE MAINTENANCE screens. For the purposes of this section of the training guide, OPTION #1 is the only choice that should be made from this particular menu.

[ENTER SELECTION _1_ AT THIS TIME]
Selection #3, as shown in Figure 1F, accesses the INQUIRE ITEM(S) screens of INVENTORY MASTER FILE MAINTENANCE. For the purposes of this section of the training guide, OPTION #3 is the only choice that should be made from this particular menu.

[ENTER SELECTION _3_ AT THIS TIME]
Figure 1G shows the first screen of INVENTORY MASTER FILE MAINTENANCE INQUIRE. The screen appears blank initially because no item number has been selected for inquiry. For the purpose of this section of the training guide, only item number 10302 should be chosen for the screen manipulation exercises that follow.
<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
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<td>Item Number</td>
<td>10302</td>
</tr>
<tr>
<td>Description</td>
<td>DICALITE BP-5</td>
</tr>
<tr>
<td>Purch/Mfg Flag</td>
<td>P</td>
</tr>
<tr>
<td>Stocked Item</td>
<td>S</td>
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<td>Item Group</td>
<td>RR</td>
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<tr>
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<td>Taxable?</td>
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<tr>
<td>Price Unit of Measure</td>
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<tr>
<td>D.L.I.</td>
<td>08/30/90</td>
</tr>
<tr>
<td>Demand Time Fence</td>
<td>0</td>
</tr>
<tr>
<td>Prod Generation Flag</td>
<td>N</td>
</tr>
</tbody>
</table>

**Figure 1H** shows the first screen of INVENTORY MASTER FILE MAINTENANCE INQUIRE after item number 10302 has been selected. The bottom of the first screen also displays a message "DO YOU WANT TO SEE THE SECOND SCREEN FOR THIS ITEM? _Y_. As you can see the response has been filled in with the alpha character _Y_ (YES). For the purpose of this section of the training guide, the alpha character _Y_ should always be chosen for the screen manipulation exercises that follow.
Figure 11 displays the second screen of INVENTORY MASTER FILE MAINTENANCE INQUIRE after item number 10302 has been selected. For the purposes of this section of the training guide, "CR TO CONTINUE" as shown in the bottom right hand corner of the screen should be adhered to.

**NOTE: CR = carriage return.**
Session 1.2 Item Master File Maintenance Inquiry

TRAINING SESSION 1.2 OUTLINE:

The user will do the following:

1) Log into the System.

2) Access the SYSTEM MENU.

3) Select INVENTORY CONTROL (option 7) SYSTEM MENU. See Figure 1B (p. 19)

4) Select ITEM MASTER FILE MAINTENANCE (option 1) INVENTORY CONTROL MENU.
   Figure 1D (p. 21)

5) Select INQUIRE ITEM(S) (option 3) INVENTORY MASTER FILE MAINTENANCE MENU. See Figure 1F (p. 22 )

6) Enter a line item number and view data on primary and secondary screens. See Figures 1H, 1I (p. 24, 25 )

7) Exit sub menu’s and log off system.
Trainers Guide:

1) Ensure power is on to all terminals.

2) Have all users press the enter key.

3) Ensure all users receive the Username: /Password: /ID#../Password.. prompts as shown in Figure 1A. (p. 17)

4) Ensure all users are on the SYSTEM MENU. Figure 1B (p. 19)

5) Have all users enter option #7 SYSTEM MENU.

6) Ensure all users are on the INVENTORY CONTROL MENU. Figure 1C (p. 21)

7) Have all users enter #1 INVENTORY CONTROL MENU. ITEM MASTER FILE MAINTENANCE. Figure 1D (p. 21)

8) Ensure all users are on the INVENTORY MASTER FILE MAINTENANCE MENU. Figure 1E (p. 22)

9) Have all users enter option #3 INVENTORY MASTER FILE MAINTENANCE MENU. Figure 1F (p. 22)

10) Ensure all users are on the INVENTORY MASTER FILE MAINTENANCE INQUIRE MENU. Figure 1G (p. 23)

11) Have all users enter item # 10302 INVENTORY MASTER FILE MAINTENANCE MENU.

12) Ensure all users are on the first INQUIRE screen with item # 10302 information displayed. Figure 1H (p. 24)

13) Have all users enter "Y" in response to the following prompt: "DO YOU WANT TO SEE THE SECOND SCREEN FOR THIS ITEM?"

14) Ensure all users are on the SECOND INQUIRE screen with item # 10302 information displayed. Figure 1I(p. 25)

15) Introduce key F12 (Backspace to END).

16) Have all users END to SYSTEM MENU, and Logoff the system option #20.
TRAINING SESSION 1.2 MODULE PRACTICE:

Users Guide:

1) Note the green light, on the bottom right front of the monitor is on.

2) Press the enter key.

3) Enter Username, password, ID#, password as shown in Figure 1A. (p. 17)

4) SYSTEM MENU SYMENy. Figure 1B (p. 19)

5) Enter option #7. Press Return

6) INVENTORY CONTROL MENU. Figure 1C (p. 21)

7) Enter option #1. Figure 1D (p. 21)

8) INVENTORY MASTER FILE MAINTENANCE MENU. Figure 1E (p. 22)

9) Enter option #3. Press Return Figure 1F (p. 22)

10) INVENTORY MASTER FILE MAINTENANCE INQUIRE MENU. Figure 1G (p. 23)

11) Enter item # 10302 Press Return.

12) View item # 10302. SCREEN 1 Figure 1H (p. 24)

13) Enter "Y". Press Return.

14) View item # 10302 SCREEN 2. Figure 1I (p. 25)

15) Press Key F12 to END.

16) Key F12 to System Menu, then logoff the System.
Conclusion:

This concludes Major Area 1.0 of the Trainers and Users Guide to Corporate Management Inventory Inquiry. The sessions may be repeated as often as desired.

It should be understood that Major Area 1.0 Session 1.0 SYSTEM ACCESS, is applicable to all user/module interactions.

Completion of Sessions 1.1, and 1.2 should enable users to perform the following tasks:

1. Log on to the System.
2. From the SYSTEM MENU access INVENTORY CONTROL applications.
3. Access the ITEM MASTER FILE MAINTENANCE applications.
4. Access the INVENTORY MASTER FILE MAINTENANCE INQUIRE feature.
5. Enter an item number and view data on the primary and secondary screens of INVENTORY MASTER FILE MAINTENANCE INQUIRE.
6. Exit the sub screens and menus of INVENTORY CONTROL.
7. Log off the System.
## MAJOR AREA 2.0

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<th>Section</th>
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<td>38</td>
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<td>Major Area 2.0 Conclusion</td>
<td>40</td>
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</table>

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<th>Figure</th>
<th>Description</th>
<th>Page</th>
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</thead>
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<td>2A</td>
<td>System Menu</td>
<td>32</td>
</tr>
<tr>
<td>2B</td>
<td>Inventory Control Menu</td>
<td>33</td>
</tr>
<tr>
<td>2C</td>
<td>Inventory Control Menu</td>
<td>33</td>
</tr>
<tr>
<td>2D</td>
<td>Stock Status Inquiry</td>
<td>34</td>
</tr>
<tr>
<td>2E</td>
<td>Stock Status Inquiry</td>
<td>34</td>
</tr>
<tr>
<td>2F</td>
<td>Stock Status Inquiry</td>
<td>34</td>
</tr>
<tr>
<td>2G</td>
<td>Stock Status Inquiry</td>
<td>35</td>
</tr>
</tbody>
</table>
Stock Status Inquiry - Permits a video display of the status of inventory items. The display includes the beginning quantity balance, issues, adjustments, current on hand balance, allocations, available on order, to be available quantities, work-in-process, year to date and prior year usage statistics, reorder point and quantity, lead time, purchased or manufactured code, status revision code, and date of last issue.

The following pages contain representations of screens within the Inventory Control module. The answers to prompts to achieve specific results are included along with a brief description of the screen discussed.
The SYSTEM MENU, shown above, is the main menu for options provided by TEC software. For the purposes of this training guide, OPTION #7 INVENTORY CONTROL and OPTION #20 LOG OFF SYSTEM, are the only two choices that should be made from this menu.

*****************************************************************************
* If at any point you enter an option other than *
* #7 INVENTORY CONTROL or #20 LOG OFF SYSTEM by *
* mistake: *
* *
* STOP — DO NOT CONTINUE *
* *
* INFORM YOUR INSTRUCTOR!! *
* *
*****************************************************************************

[ENTER OPTION _7_ AT THIS TIME]
Selection #7, as shown in Figure 2C, accesses the STOCK STATUS INQUIRY screens. For the purposes of this section of the training guide, OPTION #7 STOCK STATUS INQUIRY is the only choice that should be made from this particular menu.

[ENTER OPTION _7_ AT THIS TIME]
Figure 2D

STOCK STATUS INQUIRY

ITEM NUMBER ...........

Figure 2E

STOCK STATUS INQUIRY

ITEM NUMBER 10302.........

Figure 2F

STOCK STATUS INQUIRY

ITEM NUMBER 10302          DICALITE BP-5

BEGIN 19,013 ON HAND 12,161 W-I-P 0  LD TIME 0
RECEIPT 0 ALLOC 0 YTD USG 205,443 PUR/MFG P
ISSUE 4,989 AVAIL 12,161 PRIOR USG 418,328 STATUS
ADJMNT 1,863 IN INSP 0 REORDR PT 0 REV CODE
ON HND 12,161 ON ORDR 1610 REORDR QTY 0 DLI 05/11/90
TO BE AVL 173,181

CR TO CONTINUE

Figure 2D shows the first screen of STOCK STATUS INQUIRY. The screen appears blank initially because no item number has been selected for inquiry. For the purpose of this section of the training guide, only item number 10302 should be chosen for the screen manipulation exercises that follow.

Figure 2E shows the first screen of STOCK STATUS INQUIRY with item number 10302 entered for selection.

Figure 2F shows all relevant data pertaining to item number 10302.
Figure 2G shown below, is to be referred to for field explanations. Each field has a definition that appears on the page which follows.

**Figure 2G**

<table>
<thead>
<tr>
<th>Field Number</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>ITEM NUMBER</td>
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<tr>
<td>2</td>
<td>DICALITE BP-5</td>
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<tr>
<td>3</td>
<td>BEGIN</td>
</tr>
<tr>
<td>4</td>
<td>ON HAND</td>
</tr>
<tr>
<td>5</td>
<td>W-I-P</td>
</tr>
<tr>
<td>6</td>
<td>LD TIME</td>
</tr>
<tr>
<td>7</td>
<td>RECEIPT</td>
</tr>
<tr>
<td>8</td>
<td>ALLOC</td>
</tr>
<tr>
<td>9</td>
<td>YTD USG</td>
</tr>
<tr>
<td>10</td>
<td>PUR/MFG</td>
</tr>
<tr>
<td>11</td>
<td>ISSUE</td>
</tr>
<tr>
<td>12</td>
<td>AVAIL</td>
</tr>
<tr>
<td>13</td>
<td>PRIOR USG</td>
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<td>14</td>
<td>STATUS</td>
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<tr>
<td>15</td>
<td>ADJMNT</td>
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<td>IN INSPECTION</td>
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<tr>
<td>17</td>
<td>REORDERED PT</td>
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<tr>
<td>18</td>
<td>REV CODE</td>
</tr>
<tr>
<td>19</td>
<td>ON HAND</td>
</tr>
<tr>
<td>20</td>
<td>ON ORDER</td>
</tr>
<tr>
<td>21</td>
<td>REORDERED QTY</td>
</tr>
<tr>
<td>22</td>
<td>DLI</td>
</tr>
<tr>
<td>23</td>
<td>TO BE AVL</td>
</tr>
</tbody>
</table>

CR TO CONTINUE
<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>FIELD DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) ITEM NUMBER</td>
<td>Part/material id number.</td>
</tr>
<tr>
<td>2) DESCRIPTION</td>
<td>Part/material description.</td>
</tr>
<tr>
<td>3) BEGIN</td>
<td>Beginning monthly quantity.</td>
</tr>
<tr>
<td>4) ON HAND</td>
<td>Actual quantity count.</td>
</tr>
<tr>
<td>5) W-I-P</td>
<td>Work in process.</td>
</tr>
<tr>
<td>6) LD TIME</td>
<td>Lead time.</td>
</tr>
<tr>
<td>7) RECEIPT</td>
<td>Received item quantity.</td>
</tr>
<tr>
<td>8) ALLOC</td>
<td>Allocated item quantity.</td>
</tr>
<tr>
<td>9) YTD USG</td>
<td>Year to date usage.</td>
</tr>
<tr>
<td>10) PUR/MFG</td>
<td>Purchased or manufactured flag.</td>
</tr>
<tr>
<td>11) ISSUE</td>
<td>Quantity of an item sold.</td>
</tr>
<tr>
<td>12) AVAIL</td>
<td>Quantity of an item available.</td>
</tr>
<tr>
<td>13) PRIOR USG</td>
<td>Quantity of an item used in a prior fiscal year.</td>
</tr>
<tr>
<td>14) STATUS</td>
<td>Flag for active or inactive items.</td>
</tr>
<tr>
<td>15) ADJMNT</td>
<td>Item adjustments made to account for damage, waste, etc.</td>
</tr>
<tr>
<td>16) IN INSPI</td>
<td>Flag for items needing an inspection seal, ie, hazardous material, flammable, etc.</td>
</tr>
<tr>
<td>17) REORDR PT</td>
<td>Point at which an item should be reordered.</td>
</tr>
<tr>
<td>18) REV CODE</td>
<td>Flag that labels any physical changes to a given item.</td>
</tr>
<tr>
<td>19) ON HAND</td>
<td>Actual count quantity of an item.</td>
</tr>
<tr>
<td>20) ON ORDER</td>
<td>Quantity ordered to maintain adequate stock.</td>
</tr>
<tr>
<td>21) REORDR QTY</td>
<td>Suggested quantity to reorder items to maintain adequate stock.</td>
</tr>
<tr>
<td>22) DLI</td>
<td>The date of last issue.</td>
</tr>
<tr>
<td>23) TO BE AVL</td>
<td>The total of the ON HAND field (+) the ON ORDR field.</td>
</tr>
</tbody>
</table>
Session 2.2 Stock Status Inquiry

TRAINING SESSION 2.2 OUTLINE:

The user will do the following:

1) Log into the System.
2) Access the SYSTEM MENU.
3) Select INVENTORY CONTROL (option 7) SYSTEM MENU.
4) Select STOCK STATUS INQUIRY (option 7) INVENTORY CONTROL MENU.
5) Enter line item 10302 and view data.
6) Exit option and sub menu.
7) Log off the system.
TRAINING SESSION 2.2 MODULE PRACTICE

Trainers Guide:

1) Ensure power is on to all terminals.

2) Have all users press the enter key.

3) Ensure all users receive the Username: /Password: /ID#. /Password. prompts as shown in Figure 1A. (p. 17)

4) Ensure all users are on the SYSTEM MENU. Figure 2A (p. 32)

5) Have all users enter option #7 SYSTEM MENU.

6) Ensure all users are on the INVENTORY CONTROL MENU. Figure 2B (p. 33)

7) Have all users enter option #7 INVENTORY CONTROL MENU. STOCK STATUS INQUIRY Figure 2C (p. 33)

8) Ensure all users are in the STOCK STATUS INQUIRY MODULE. Figures 2D, 2E (p. 34)

9) Have all users enter item #10302 INVENTORY MASTER FILE MAINTENANCE MENU.

10) Ensure all users are on the STOCK STATUS INQUIRY screen with item #10302 information displayed. Figure 2F (p. 34)

11) Have users "CR TO CONTINUE"

12) Key F12 (Backspace to END).

13) Have all users END to SYSTEM MENU, and Logoff the system option #20.
TRAINING SESSION 2.2 MODULE PRACTICE:

Users Guide:

1) Note the green light, on the bottom right front of the monitor is on.

2) Press the enter key.

3) Enter Username, password, ID#, password as shown in Figure 1A. (p. 17)

4) SYSTEM MENU SYMENU . Figure 2A (p. 32)

5) Enter option #7. Press Return.

6) INVENTORY CONTROL MENU . Figure 2B (p. 33)

7) Enter option #7. Press Return. Figure 2C (p. 33)

8) STOCK STATUS INQUIRY . Figures 2D, 2E (p. 34)

9) Enter item # 10302 Press Return.

10) View item # 10302. Figure 2F (p. 34)

11) "CR TO CONTINUE"

12) Press Key F12 to END.

13) Key F12 to System Menu, then logoff the System.
Conclusion:

This concludes Major Area 2.0 of the Trainers and Users Guide to Corporate Management Inventory Inquiry. The sessions discussed may be repeated as often as desired.

It should be understood that Major Area 1.0, Session 1.1 SYSTEM ACCESS, is applicable to all user/module interactions.

Completion of Major Area 2.0, Sessions 2.1, and 2.2 should enable users to perform the following tasks:

1. Log on to the System.

2. From the SYSTEM MENU access INVENTORY CONTROL applications.

3. Access the STOCK STATUS INQUIRY application.

4. Enter an item number and view data on the primary and secondary screens of STOCK STATUS INQUIRY.

6. Exit the sub screens and menus of INVENTORY CONTROL STOCK STATUS INQUIRY.

7. Log off the System.
MAJOR AREA 3.0

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The SYSTEM MENU, shown above, is the main menu for options provided by TEC software. For the purposes of this training guide, OPTION 7 INVENTORY CONTROL, and OPTION 20 LOG OFF SYSTEM, are the only two choices that should be made from this menu.

**********************************************************
* If at any point you enter an option other than *
* 
* #7 INVENTORY CONTROL or #20 LOG OFF SYSTEM by *
* 
* mistake:
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Section 3.1 Inventory Control Twelve-Month Usage Tracking

Twelve-Month Usage Tracking - Permits a graphic display of the activity of a specific item over a period of twelve months. The option does not allow any changes and/or deletions to occur. The graphic representation is field option selected by one of five choices, which are as follows:

1. QUANTITY USED
2. QUANTITY SOLD
3. SALES $
4. COST OF SALES
5. PROFIT

The following pages contain representations of screens within the Inventory Control, Twelve-Month Usage Tracking module. The answers to prompts to achieve specific graphic representations are included.
Selection #19, as shown in Figure 3C, accesses the TWELVE-MONTH USAGE TRACKING screens. For the purposes of this section of the training guide, OPTION #19 is the only choice that should be made from this particular menu.

[ENTER OPTION _19_ AT THIS TIME]
Figure 3D

TWELVE MONTH TRACKING

ENTER THE ITEM NUMBER

Figure 3E

TWELVE MONTH TRACKING

ENTER THE ITEM NUMBER 10302

Figure 3F

TWELVE MONTH TRACKING

ENTER THE ITEM NUMBER 10302

SELECT FIELD OPTION

1. QUANTITY USED
2. QUANTITY SOLD
3. SALES $
4. COST OF SALES
5. PROFIT

Figure 3D shows the first screen of TWELVE-MONTH USAGE TRACKING. The screen appears blank initially because no item number has been selected for inquiry. For the purpose of this section of the training guide, only item number 10302 should be chosen for the screen manipulation exercises that follow.

Figure 3E shows the first screen of TWELVE-MONTH USAGE TRACKING with item number 10302 entered for selection.

Figure 3F shows item number 10302 with the listing of the SELECT FIELD OPTIONS available to users.

[ENTER OPTION _1_ AT THIS TIME]
**Figure 3G**

**TENW1N MONTH TRACKING INVS**

ENTER THE ITEM NUMBER 10302........ DICALITE BP-5

<table>
<thead>
<tr>
<th>MONTH</th>
<th>QUANTITY USED IN PAST TWELVE MONTHS</th>
</tr>
</thead>
<tbody>
<tr>
<td>APR.</td>
<td>26,596</td>
</tr>
<tr>
<td>MAR.</td>
<td>0</td>
</tr>
<tr>
<td>FEB.</td>
<td>27,224</td>
</tr>
<tr>
<td>JAN.</td>
<td>51,756</td>
</tr>
<tr>
<td>DEC.</td>
<td>33,968</td>
</tr>
<tr>
<td>NOV.</td>
<td>27,117</td>
</tr>
<tr>
<td>OCT.</td>
<td>33,773</td>
</tr>
<tr>
<td>SEP.</td>
<td>41,250</td>
</tr>
<tr>
<td>AUG.</td>
<td>53,265</td>
</tr>
<tr>
<td>JUL.</td>
<td>42,943</td>
</tr>
<tr>
<td>JUN.</td>
<td>35,458</td>
</tr>
<tr>
<td>MAY.</td>
<td>37,655</td>
</tr>
</tbody>
</table>

- PRIOR YTD -

227,757

MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR APR

**CR TO CONTINUE**

---

Figure 3G is the graphic representation for item number 10302 over a twelve month period. Again, there is only one screen, shown in Figure 3H above, available in this module. Note the "CR TO CONTINUE" shown on bottom right hand corner of the screen should be adhered to.

[PRESS THE RETURN KEY TO CONTINUE]
For the purposes of this training guide only item number 10302 has been chosen for all screen manipulation exercises. Item number 10302 is classified as a Raw Material, which is an item that may be used to produce several Finished Goods and/or Work In Process. For the screen manipulation exercises that follow, and in order to see other graphs produced by the other SELECT FIELD OPTION of this module, six item numbers, which represent the major classes of materials, Raw Materials, Finished Goods, and Work In Process are listed below.

<table>
<thead>
<tr>
<th>Item Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raw Materials:</td>
</tr>
<tr>
<td>103098C</td>
</tr>
<tr>
<td>21009AA</td>
</tr>
</tbody>
</table>

TRAINING SESSION 3.2 OUTLINE:

The user will do the following:

1) Log into the System.

2) Access the SYSTEM MENU.

3) Select INVENTORY CONTROL (option 7) SYSTEM MENU.

4) Select STOCK STATUS INQUIRY (option 19) INVENTORY CONTROL MENU.

5) Enter line item 10302 and view graph.

6) Enter line item numbers provided and view graphs.

7) Exit screen option, and sub menus.

8) Log off the system.
TRAINING SESSION 3.2 MODULE PRACTICE

Trainer:

1) Ensure power is on to all terminals.

2) Have all users press the enter key.

3) Ensure all users receive the Username: /Password: /ID#.. /Password.. prompts as shown in Figure 1A. (p. 17)

4) Ensure all users are on the SYSTEM MENU. Figure 3A (p. 42)

5) Have all users enter option #7 SYSTEM MENU. Figures 3B (p. 44)

6) Ensure all users are on the INVENTORY CONTROL MENU. Figure 3C (p. 44)

7) Have all users enter option #19 TWELVE- MONTH USAGE TRACKING Figure 3D (p. 45)

8) Ensure all users are in the TWELVE MONTH TRACKING MODULE. Figure 3E (p. 45)

9) Have all users enter item # 10302 TWELVE MONTH TRACKING MODULE. Figure 3F (p. 45)

10) Ensure all users are on the SELECT FIELD OPTION prompt. Figure 3F (p. 45)

11) Have all users enter "1" in response to the following prompt:

SELECT FIELD OPTION 1

12) Ensure all users receive the Quantity Used graph for item # 10302. Figure 3G (p. 46)

13) Have all user "CR TO CONTINUE"

14) Introduce key F12 (Backspace to END).

15) Have all users key F12 once to enter a new item number.

16) Have all users choose from the item numbers listed, an item from another category to display.

17) Have all users END to SYSTEM MENU, and Logoff the system option #20.
TRAINING SESSION 3.2 MODULE PRACTICE:

Users Guide:

1) Note the green light, on the bottom right front of the monitor is on.

2) Press the enter key.

3) Enter Username, password, ID#, password as shown in Figure 1A(p. 17)

4) SYSTEM MENU SYMENU. Figure 3A (p. 42)

5) Enter option #7. Press Return.

6) INVENTORY CONTROL MENU. Figure 3C (p. 44)

7) Enter option #19. Press Return. Figure 3D (p. 45)

8) TWELVE MONTH TRACKING MODULE. Figure 3E (p. 45)

9) Enter item # 10302 Press Return. Figure 3F (p. 45)

10) View SELECT FIELD OPTIONS Figure 3F (p. 45)

11) Enter "1" Press Return.

12) View item # 10302 Figure 3G (p. 46)

13) Press Return to Continue.

14) Press Key F12 to END.

15) Key F12 once to enter a new item number.

16) Choose a new item number from those listed to display information.

17) Key F12 to System Menu, then logoff the System.
Conclusion:

This concludes Major Area 3.0 of the Trainers and Users Guide to Corporate Management Inventory Inquiry. The sessions discussed may be repeated as often as desired.

It should be understood that Major Area 1.0, Session 1.1 SYSTEM ACCESS, is applicable to all user/module interactions.

Completion of Major Area 3.0, Sessions 3.1 should enable users to perform the following tasks:

1. Log on to the System.

2. From the SYSTEM MENU access INVENTORY CONTROL applications.

3. Access the TWELVE-MONTH USAGE TRACKING module.

4. Enter an item number and view graphic data on screen.

5. Exit the graph screen and enter new item numbers to view on screen data.

6. Exit the TWELVE MONTH USAGE TRACKING module.

7. Log off the System.
The thesis submitted by Christopher Dixon has been read and approved by the following committee:

Dr. Todd Hoover, Director  
Associate Professor  
Curriculum and Human Resource Development  
Loyola University of Chicago

Dr. Robert Cienkus  
Associate Professor  
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The final copies have been examined by the director of the thesis and the signature which appears below verifies the fact that any necessary changes have been incorporated and that the thesis is now given final approval by the Committee with reference to content and form.

The thesis is, therefore, accepted in partial fulfillment of the requirements of the degree for Master of Arts.

4-18-91  
Date  

Director's Signature