

Boise Depot / Office Inventory

Site collection: Supply Chain Solutions

Department/team: Supply Chain Solutions

Creator: Nicole Harris

Groups Used: All SharePoint users

Solution function: The purpose of this solution was to automate the business processes for the Boise Depot / Office Inventory and create an automated workflow solution that could be replicated for other depot locations.

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Business Process

- Item added to inventory

- Initial actions offline → Boise administrator submits form → Part owner updates warehouse location
→ Item sent warehouse location

- Item requested from storage

- Part owner requests item from storage → Part owner selects return location and priority → Boise administrator notified → Boise administrator updates return tracking number

List settings

List settings

Column name	Column type
Item #	Single line of text
Date received	Date and Time
Part number / Factory reference	Single line of text
Part description	Single line of text
Business unit	Choice
Bogai / WIP / other	Choice
Invoice number	Single line of text
NCDR	Single line of text
Part owner	Single line of text
Part owner (AD)	Person or Group
Dimensions	Single line of text
Number of boxes	Single line of text
Comments	Multiple lines of text

Warehouse location	Choice
Date picked up by owner	Date and Time
Date sent to storage	Date and Time
Date removed from storage	Date and Time
Tracking number	Single line of text
In UPS storage?	Choice
Task due date	Date and Time
Return location	Choice
Return priority	Choice
Return details	Single line of text
Return tracking number	Single line of text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

Form settings

Nintex form sections

- Submission details
 - New, Display, and Edit modes
- Warehouse location
 - Hidden in new mode
- Package requested from offsite storage
 - Hidden in new mode
- Attachments
 - New, Display, and Edit modes

Boise Depot / Office Inventory request

Submission details

Item number: *

Test item

Date received: *

10/24/2019



Part number /
Factory reference:

2342-45644

Part description:

This is a test

Business unit:

ETCH



Bogai / WIP / other:

Other



Invoice number:

34543345

NCDR:

3533455

Part owner:

Nicole Harris

Part owner (AD): *

TEH IS Harris, Nicole



Dimensions:

20x30x40, 50lbs

Number of boxes:

2

Comments:

Warehouse location

Warehouse location:

Boise Warehouse 1



Tracking number:

Mesa Storage & UPS Depot only

Date sent to storage:



Date picked up by
owner:



Package requested from offsite storage

Return location:

Boise office



Return priority:

Next day



Return tracking
number:

This is a test

Return details:

This is a test

Date removed from
storage:



Attachments

Attachments:

[Add Attachment](#)

Submit

Cancel

Content Type: Item

Created at 10/24/2019 11:32:36 AM by TEH IS Harris, Nicole

Last modified at 11/22/2019 2:47:18 PM by TEH IS Harris, Nicole

Nintex form rules

- Formatting rule: Hide in new mode

The screenshot shows the 'Name' field set to 'HideInNewMode'. The 'Rule Type' is set to 'Formatting'. The 'Condition' is set to 'Is New Mode'. The 'Formatting' section shows the 'Font' dropdown set to 'pt', with bold, italic, and underline buttons. The 'Preview Text' field is empty. At the bottom, the 'Disable' checkbox is unchecked and the 'Hide' checkbox is checked.

The screenshot shows the 'Formula Builder' window with the 'Named Controls' tab selected. The list of controls includes 'Item', 'Datereceived', 'Partnumber', 'Partdescription', 'Businessunit', 'BogaïWIPother', 'Invoicenummer', 'NCDR', 'Partowner', 'PartownerAD', 'Dimensions', 'Numberofboxes', and 'Comments'. The 'Formula' field contains the text '= Is New Mode'.

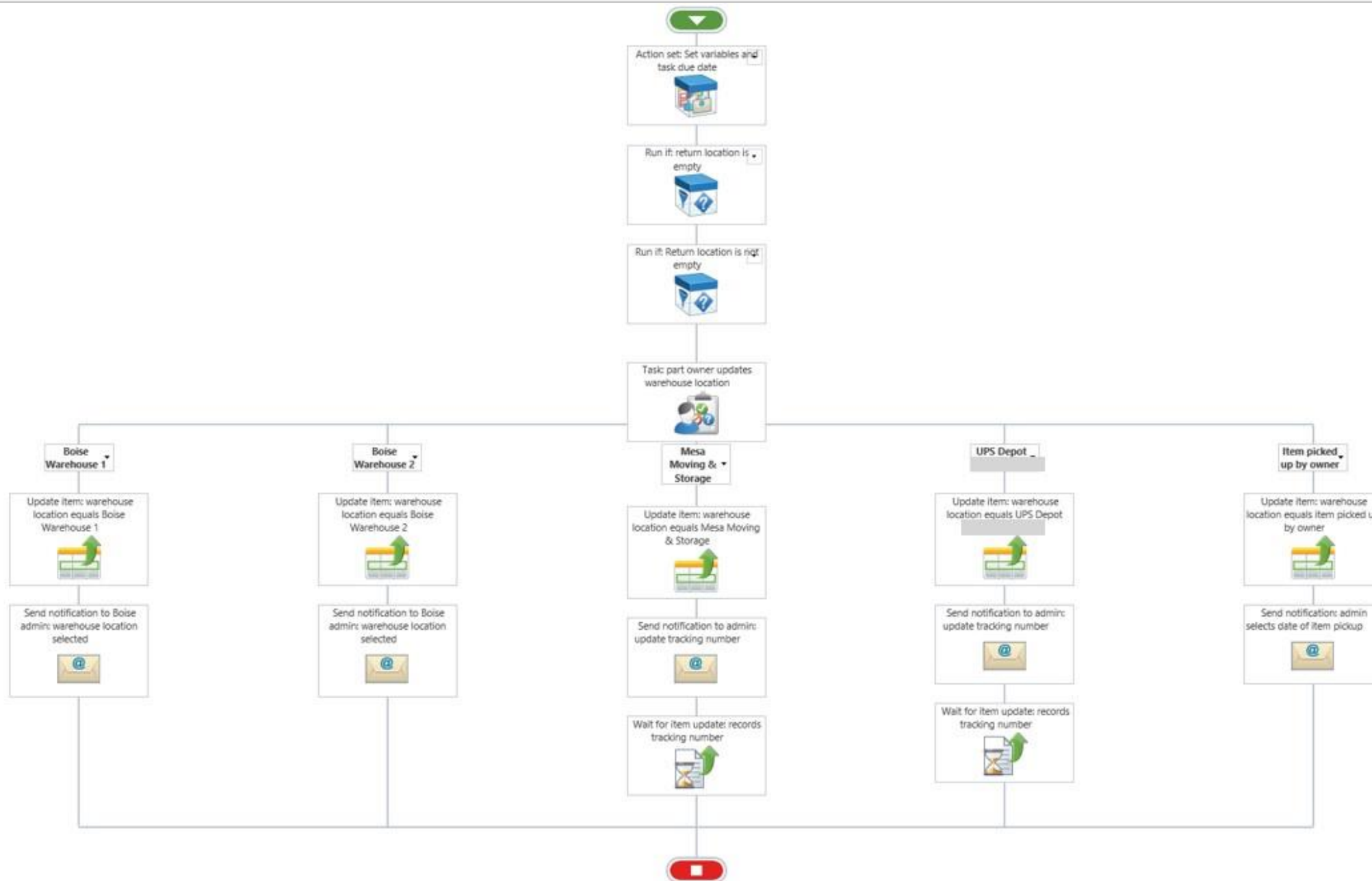
Workflow settings

Workflow settings

- Boise Depot Inventory - New request
 - Triggered automatically when a new item is submitted
 - The workflow can also be triggered manually by selecting “Item returned to Boise Office” from the item start menu
- Request item from offsite storage
 - Triggered manually, includes workflow start form
 - Part owner selects “Request item from storage” from the item start menu to start workflow

Boise Depot Inventory - New request

- Action set: set variables and task due date
 - Actions: Set variables, Query user profile, Calculate date, Set field value
- Run if: Return location is empty
 - Sends notification to Boise admin is Return location is empty
- Run if: Return location is not empty
 - Sets variable for ReturnLocationTrue that is used in task notification
- Flexi-task: Part owner updates warehouse location
 - Workflow branches based on warehouse location selected by part owner



Boise Depot Inventory - New request

- Action highlight: Calculate date
 - Due date is two weeks from the time the item is added to the list.

Configure Action - Calculate date

GENERAL

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Date * Value 12/5/2019 12 AM 00

☒ Use date when action is executed ☐ Include time

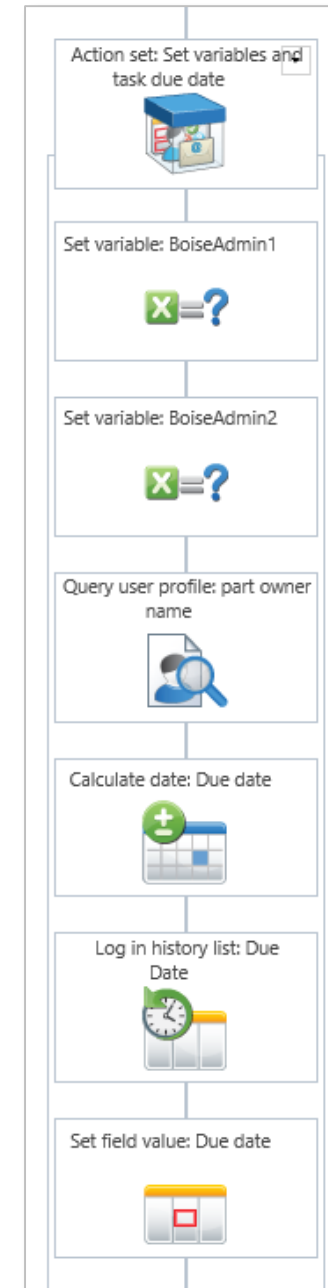
Years Value 0

Months Value 0

Days Value 14

Hours Value 0

Minutes Value 0



Boise Depot Inventory - New request

- A reminder is sent to the part owner 7 days after submission if the task has not been completed.

Workflow Notification

Hello TEH IS Harris, Nicole,

This is reminder to complete the update storage location for Test item.

Click [here](#) to select a warehouse location for storing your package or indicate that you will pick it up.

Item number: Test item
Date received: 10/24/2019
Business Unit: ETCH
Bogai / WIP / Other: Other
Part number: 2342-45644
Part description: This is a test
Invoice number: 34543345
Dimensions: 20x30x40, 50lbs
Number of boxes: 2

Thank you,

Boise Depot Inventory - New request

- After two weeks, the task will be delegated back to the Boise administrator.

Workflow Notification

A task regarding this item no longer requires your response:

[Test item](#)

Click [here](#) to view the workflow status

Please note:
This task has been delegated to Please see comments below:

Select storage location task not completed by part owner, delegated to Boise Admin

Boise Depot Inventory - New request

- The Boise administrator receives an email confirmation when the item is initially submitted.

Workflow Notification

The Boise inventory request [Test item](#) has been submitted.

Item number: Test item
Date received: 10/24/2019
Business unit: ETCH
Bogai / WIP / Other: Other
Part number: 2342-45644
Part description: This is a test
Invoice number: 34543345
NCDR number: 3533455
Part owner: Nicole Harris
Dimensions: 20x30x40, 50lbs
Number of boxes: 2

Thank you,

Boise Depot Inventory - New request

- Flexi-task notification: Return Location is false
 - If there is no return location, the ReturnLocation true variable will be blank

Workflow Notification

Hello TEH IS Harris, Nicole,

Your package has arrived at the Boise Depot/Office Inventory.

Click [here](#) to select a warehouse location for storing your package or indicate that you will pick it up within two weeks.

Item number: Test item 2
Date received: 12/2/2019
Business Unit: ETCH
Bogai / WIP / Other: Bogai
Part number: 23432432
Part description: This is a test
Invoice number: 2343432
Dimensions: 20x40x60, 100 lbs
Number of boxes: 2 boxes

Thank you,

Boise Depot Inventory - New request

- Flexi-task notification: Return Location is true

Workflow Notification

Hello TEH IS Harris, Nicole,

Your package has arrived at the Boise Depot/Office Inventory. **As requested, your item has been returned from the Boise office. Please consume or let us know if you want to send it back to storage.**

Click [here](#) to select a warehouse location for storing your package or indicate that you will pick it up within two weeks.

Item number: Test item 2
Date received: 12/2/2019
Business Unit: ETCH
Bogai / WIP / Other: Bogai
Part number: 23432432
Part description: This is a test
Invoice number: 2343432
Dimensions: 20x40x60, 100 lbs
Number of boxes: 2 boxes
Comments: This is not a real item
[Add additional comments](#)

Thank you,

Boise Depot Inventory - New request

- The Boise administrator receives a notification once the storage location has been updated.

Workflow Notification

Hello,

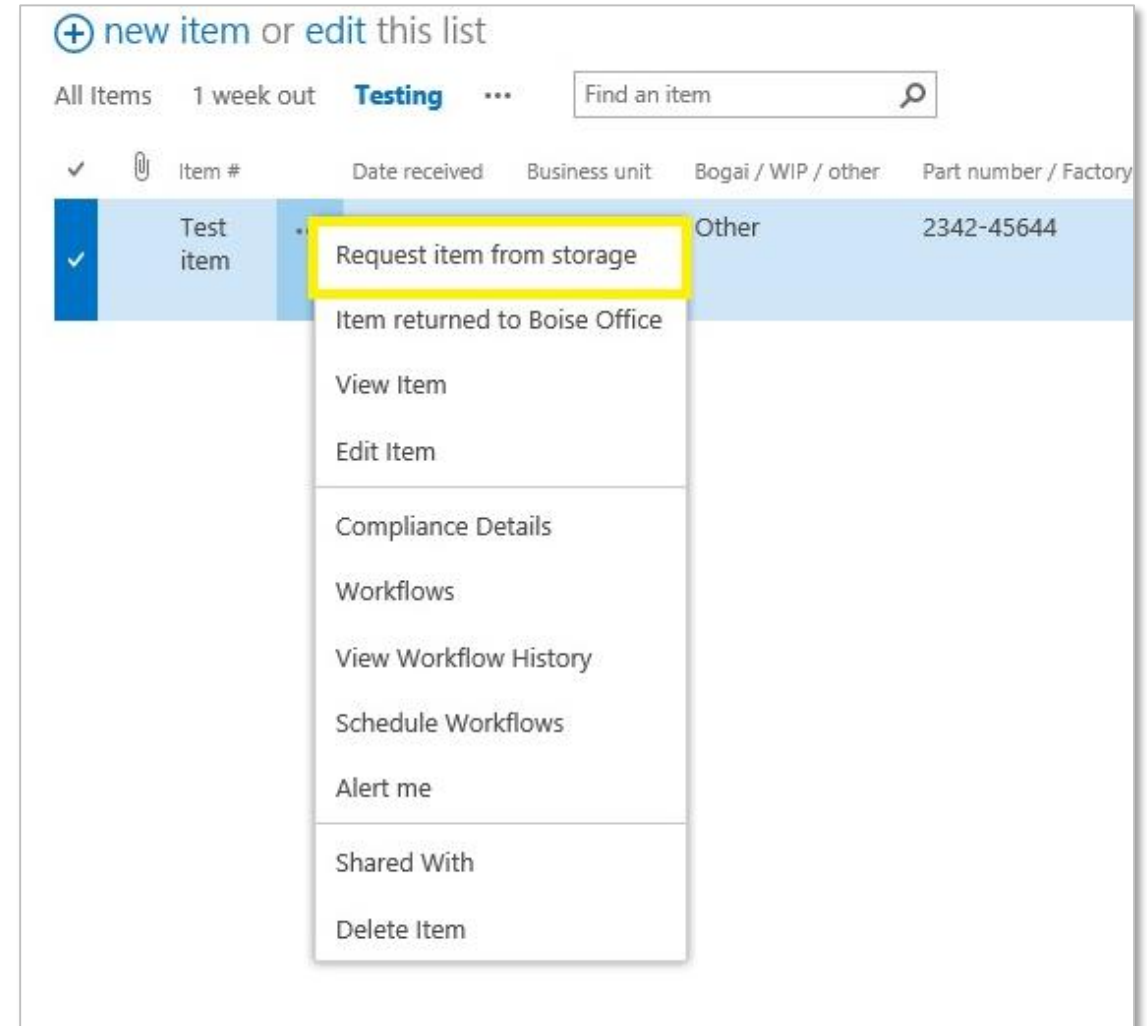
TEH IS Harris, Nicole has updated the warehouse location for [Test item](#).

Item number: Test item
Warehouse location: Boise Warehouse 2
Business unit: ETCH
Bogai / WIP / Other: Other
Part number: 2342-45644
Invoice number: 34543345
NCDR number: 3533455
Dimensions: 20x30x40, 50lbs
Number of boxes: 2

Thank you,

Request item from offsite storage

- Workflow is triggered manually
 - Part owner selects “Request item from storage” from the item menu to start the workflow



Request item from offsite storage

- Workflow start form
 - Return location and Return priority are required fields

Boise Depot / Office Inventory

Package requested from offsite storage

Item number:

Test item

Return location:

Boise office

▼

Return priority:

Next day

▼

Return details:

This is a test

Comments:

Attachments

Attachments:

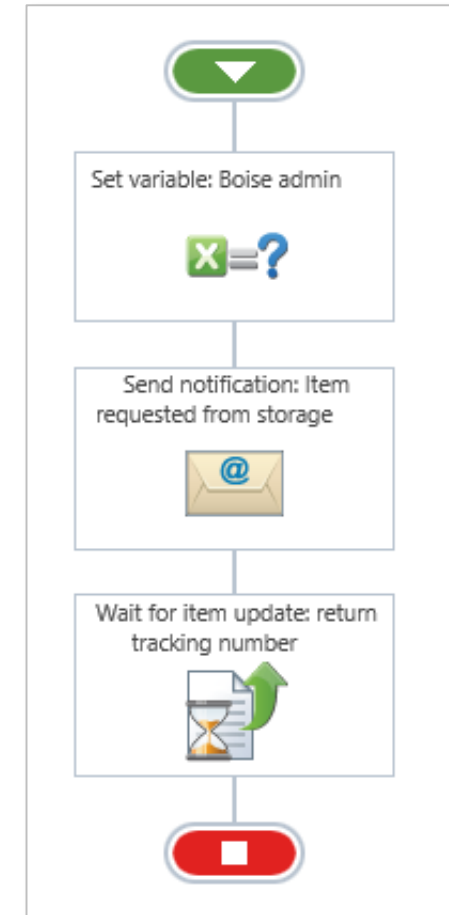
 [Add Attachment](#)

Submit

Cancel

Request item from offsite storage

- Workflow actions
 - Set variable
 - Send notification
 - Wait for item update



Request item from offsite storage

- The Boise admin receives a notification that the item has been requested from storage.

Workflow Notification

Hello,

Item Test item has been requested from offsite storage. Please update the [return tracking number](#).

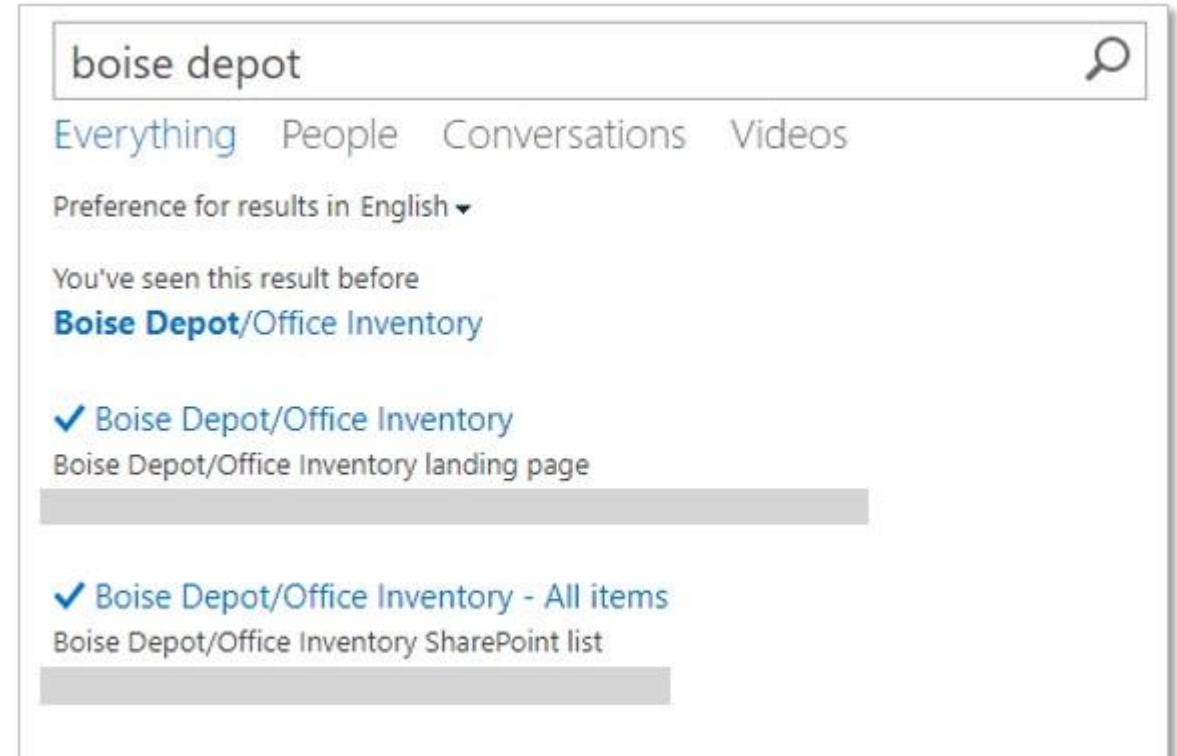
Current location: Boise Warehouse 1
Return location: Boise office
Return priority: Next day
Return details: This is a test
Comments: Testing workflow 2

Thank you,

SharePoint navigation

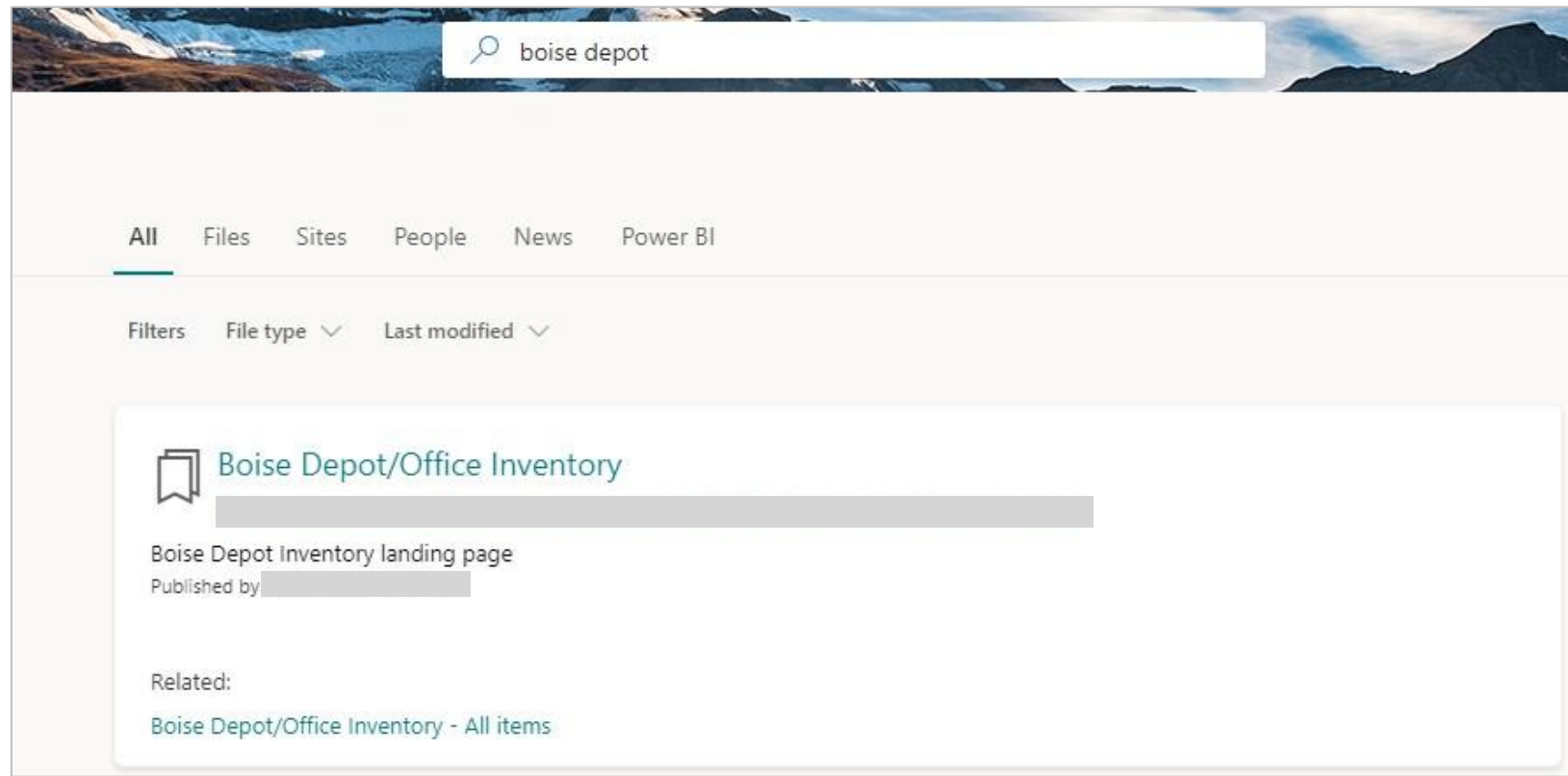
SharePoint navigation

- Promoted search results for Boise Depot Inventory
 - Search “boise,” “boise depot,” “boise depot inventory,” “boise office,” or “boise warehouse”



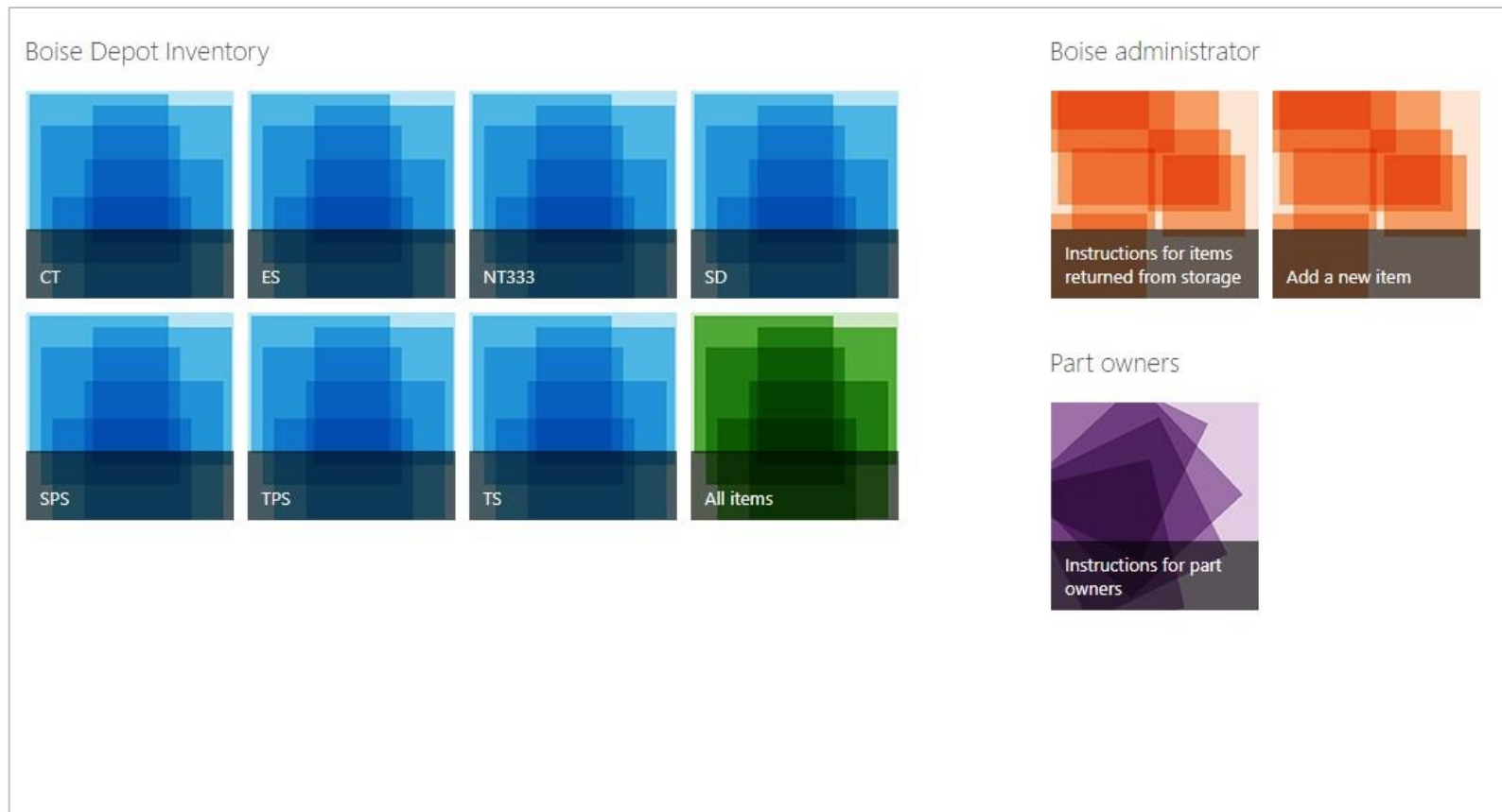
SharePoint navigation

- Microsoft search “bookmark” results for Boise Depot Inventory
 - Search “boise,” “boise depot,” “boise depot inventory,” “boise office,” or “boise warehouse”



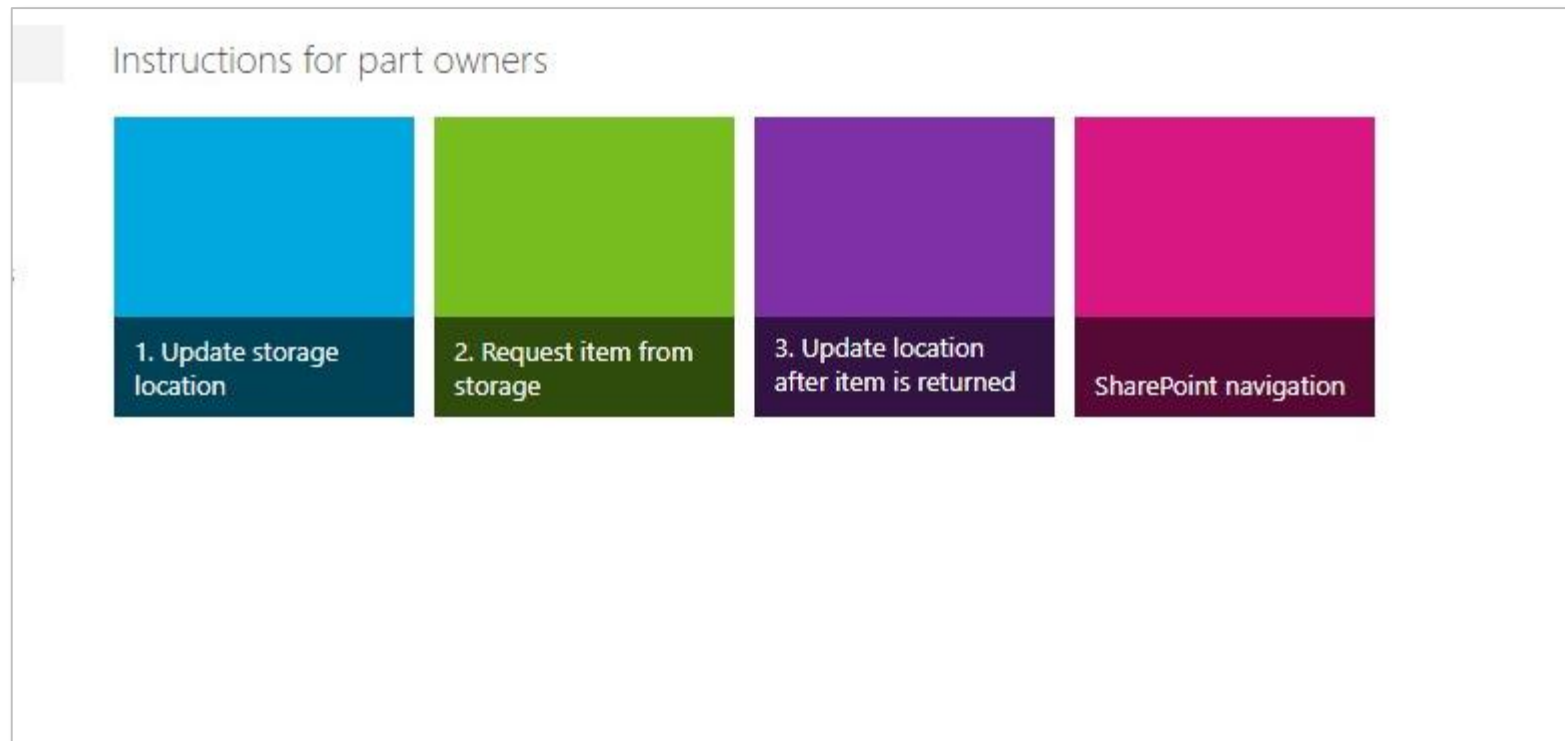
SharePoint navigation

- Landing page for the Boise Depot / Office inventory solution.



SharePoint navigation

- Instructions for part owners
 - I created a four part wiki series for part owners to guide them through the inventory process.



SharePoint navigation

