

IMS

Inventory Management System

Full User Guide

Mercy Health — IT Asset Warehouse (CORD)

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Applies to ims-mercy.com

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New in this edition (October 2026)

The Rack Map — every shelf at CORD has a bin code, devices are put away by scanning, and placards label the racks (chapter 7).

Maintenance sub-states — a device in maintenance at CORD says what it is waiting on (chapter 6).

Bulk Decommission for a whole pallet, and the Decommission form now checks the master lease schedule (chapter 9).

A leading S is removed from any serial on Receive Printer, Ship and Decommission (chapter 5).

New reports: Transactions, Month-End Counts and In Maintenance, plus review tracking on Decommission (chapter 14).

Sorting on the Inventory page; **Team Lead and period filters** on Shipped.

Help in the menu opens this guide and the Quick Reference.

1. About IMS

IMS replaces the shared Excel workbook that used to track printers, parts and accessories at the CORD warehouse. It is a multi-user web application: everyone sees the same data at the same time, and every movement of a device is recorded.

What IMS tracks

- **Printers and multifunction devices** from the moment they arrive at CORD until they are shipped, decommissioned or returned to a vendor.
- **Where each device sits** on the CORD racks, down to the shelf — see the Rack Map.
- **Parts and accessories** — trays, fusers, and similar items, received and shipped separately from devices.
- **Depot stock** at the 17 EPDS sites, kept in step with the field through TIA.
- **Lease information**, so devices on a lease can be returned on time.
- **Damage claims and RMAs**, including photographs, from first report to vendor return.

How IMS relates to TIA and ServiceNow

IMS shares a database with **TIA** (the Tech Install Application). Field techs use TIA; warehouse staff use IMS. They read and write some of the same records, which is why a device shipped from CORD appears in TIA the moment it is sent, and why a device a tech adds at a depot appears in IMS immediately.

ServiceNow remains the system of record for the wider organisation. IMS fills the gap ServiceNow does not cover: what is physically on the warehouse shelves right now.

The one rule behind everything else

The **serial number** is the universal key. Every device is identified by its serial in IMS, in TIA and in CMDB. If a serial is wrong, nothing else about that device can be trusted — which is why serials are normalised automatically and can never be edited after receipt.

2. Getting Started

Signing in

1. Go to **ims-mercy.com**.
2. Enter your username and password. Use the eye icon to check what you typed.
3. Read the Legal Notice if it appears, then continue.

Sessions last about 8 hours. After that you will be asked to sign in again. If you are ever returned to the login page unexpectedly, your session simply expired — sign in and carry on.

First sign-in: changing your password

New accounts are created with a temporary password. The first time you reach the Dashboard you will be prompted to set your own. You cannot dismiss this prompt, and you should not share the password you choose.

Finding your way around

The bar across the top is the main navigation. On a phone or tablet, tap the menu icon at the top left to open the same list as a drawer. The page you are on is underlined.

You will only see the sections your role allows — see the next chapter. Your username appears at the right of the bar, with **Sign Out** beside it.

Help, the last item in the menu, opens this guide and the two-page Quick Reference. View opens the PDF in a new tab (on a phone, in the phone's own viewer); Download saves a copy.

Using IMS on a phone

Every page works on a phone. Two things are mobile-only:

- **Barcode scanning.** Serial, asset tag and MercyID fields show a scan button on phones and tablets. It is hidden on desktop because there is no camera to use.
- **Photo capture.** Damaged-device photos can be taken directly with the phone camera.

Using a handheld scanner

At a laptop, the warehouse's handheld barcode scanner works on every page. Put the cursor in a field and scan: the scanner types the barcode as if you had typed it, then presses Enter. Pages built for scanning — Bulk Decommission, the Rack Map and the bin pages — put the cursor in the right box for you, so you can scan one item after another without touching the mouse.

3. Roles and Permissions

IMS has three roles. Your role decides which parts of the navigation you see and what you can change.

Role	What it can do
admin	Everything, including the Admin Panel, reversing transactions, deleting records, and all imports and exports. Tim is the sole administrator.
user_full	Day-to-day warehouse work: receive, ship, decommission (one device or a whole pallet), put devices away in bins and move them, manage parts, run reports, and use the Audit page. Can add photos to damaged claims but cannot delete them.
user_basic	Read-only. Can view Inventory, Parts, Shipped, Damaged Claims, Lease Returns, the Rack Map and the Device Timeline, and can export those lists to CSV. Cannot receive, ship, decommission, put devices away, or open Reports or Audit.

If a menu item is missing

It is hidden because of your role, not broken. A **user_basic** account will not see Receive, Ship, Decommission, Reports or Audit. Ask Tim if you need a different level of access.

4. The Dashboard

The Dashboard is the page you land on after signing in. Five tiles summarise the warehouse at a glance:

Tile	What it counts
In Stock	Devices currently available at CORD and the depots.
Shipped This Month	Devices sent out since the first of the month.
Decom'd This Month	Devices decommissioned since the first of the month.
Active RMAs	Damaged claims not yet closed. Click through to the Damaged Claims page.
Active Lease Returns	Lease returns still open.

The tiles are live — they reflect what is in the system at the moment the page loads. Refresh the page to update them.

5. Receiving Devices and Parts

Receive → Printer is the one place to receive every printer that arrives at CORD: new stock, devices coming back from the field, and devices IMS is already expecting. The only exception is a device you already know is going to be decommissioned; take that straight to the Decommission form. Choosing Receive presents two options, Printer or Part, because the two capture different information.

Receiving a printer

1. Choose **Receive → Printer**.
2. Enter or scan the **serial number**. IMS looks it up straight away and shows what it already knows in a coloured banner (see What the banner means, below). The button at the bottom changes to match what will happen.
3. Asset tag, MercylID, manufacturer and model fill in automatically: from the device's own IMS record if IMS is expecting it, otherwise from CMDB. Correct them if the label disagrees. If the asset tag is blank, scan it now; a tech's Removal can be filed without one.
4. Choose a status: In Stock, In Maintenance or New Damaged. Choosing **In Maintenance** also asks for a **Maintenance Sub-state** (what it is waiting on — see chapter 6), and for Awaiting Parts an optional ETA. Choosing Decommission takes you to the decommission form instead.
5. **Bin**: scan the bin's barcode on the rack placard, or type its code (for example A-3-2), to put the device away in the same step. Leave it blank and the device waits in the Rack Map's Unassigned list. A project name is optional too.
6. Click the button: **Receive Device**, **Check In Device**, **Receive at CORD** or **Record Arrival at CORD**, depending on the banner. The device is now at CORD and the event appears on its Device Timeline.

What the banner means

As soon as you enter a serial, a coloured banner may appear beneath the field. It tells you what IMS already knows before you commit anything, and the button follows it:

Banner	Meaning	What to do
Purple — Inbound to CORD	IMS is expecting it: a tech sent it in from the field with a Removal in TIA, or a depot shipped it back on a pallet. The banner says which, who and when.	Check the details, pick a status and click Check In Device .
Blue — Return from field	It was shipped out before and has come back, with no Removal filed in TIA.	Normal. Click Receive Device .
Amber — Listed at a depot	IMS has it at an EPDS depot, or on its way to one, but you have it at CORD, usually because it was carried in without a pallet.	Tick This device is here at CORD , then click Receive at CORD . IMS takes it off the depot.
Red — Damaged In Transit	It arrived damaged at a depot and has an open claim. The banner links to the claim.	Click Record Arrival at CORD . Its status and claim stay as they are until the claim is closed.

Banner	Meaning	What to do
Amber — Already in CORD inventory	It has been received already. The banner says when and by whom.	The button is disabled. Check you are holding the right unit; change its status from the Inventory page.
Red — Decommissioned	It was retired, and that record is still active.	It cannot be received. If it is going back into stock, ask Tim to restore it first (Admin → Reverse).

Checking in a device IMS is expecting

A check-in counts as the CORD receipt: you become Received By and the scan time becomes the Receive Date. Where the device came from, the tech's Removal or the depot's pallet, stays on the Device Timeline. Anything you type in Notes is added to the existing note rather than replacing it, and lease details are filled in from the lease schedule, as on any receive.

Two checks catch a wrong scan. A serial scanned with a leading S has the S removed (see the box below), so it matches the serial IMS holds. And if the MercyID already belongs to another device, a warning appears under the MercyID field. Some devices carry two serial labels, so check you scanned the right one.

Receiving a damaged device

Choosing **New Damaged** as the status does three things automatically: it opens a Damaged Claim, it emails the damaged-device recipients, and it shows a reminder to photograph the damage. After you submit, the success message includes a link straight to the new claim so you can add photos. This works the same when you are checking a device in.

Receiving a part

Receive → Part captures the part number, type, manufacturer and model. Parts are not tracked in CMDB and their manufacturer and model are free text — they are not tied to the printer model catalogue.

Serials are cleaned up as you type

Serials are forced to UPPERCASE everywhere. On **Receive Printer, Ship and Decommission** a leading S is removed from any serial, whatever the make — a barcode often carries an S that is not part of the serial — and the page says "(leading S removed)" so you can see it happened. Two exceptions stop it inventing a serial: a serial IMS already holds exactly as scanned is left alone, and so is one that starts SS. On other pages the S is removed only from Lexmark serials. Spaces are stripped from MercyIDs. Scanned and typed entries are treated alike, so the same device always gets the same identifier.

6. Working with Inventory

The Inventory page lists everything currently on hand. It opens filtered to the CORD warehouse; use the location filter to look at a depot or at everything at once. The **Rack Map** link at the top shows where the CORD devices sit on the racks (chapter 7).

Finding a device

- **Search** matches serial, asset tag and MercyID.
- **Filters** narrow by location, status, manufacturer, model, project, lease and bin. Each list only offers values that exist under the other filters you have chosen.
- **Sort** by clicking a column heading: once for A to Z, again for Z to A. Blanks always sort last. On a phone, use the **Sort by** box in the filter bar instead.
- **Leased devices** carry an amber LEASED tag in the Lease column. Set them aside rather than scrapping them — a buyout may be owed to the leasing company.
- **Export CSV** downloads exactly what the filters are showing, in the order shown — not the whole table. The file name says which filters were on.

Device statuses

Status	Meaning	Set by
In Stock	Available to ship.	You, on receive or edit
In Maintenance	Being repaired; not available to ship. At CORD it also carries a sub-state saying what it is waiting on.	You, on receive or edit
New Damaged	Arrived damaged. Has an open claim.	You, on receive or edit
In Transit	Shipped to a depot, or on its way to CORD from a TIA Removal or a depot pallet; not yet checked in.	The system, on shipping or a TIA Removal
Damaged In Transit	A depot reported it arrived damaged.	A tech, in TIA
Pending Transfer	A tech has staged it for an outbound pallet.	A tech, in TIA

Three statuses you cannot set yourself

In Transit, **Damaged In Transit** and **Pending Transfer** are owned by the depot workflow. They appear in IMS and you can see them, but they are not offered in the status dropdown — they are created by shipping a device or by a tech acting in TIA. This keeps the two systems from disagreeing about where a device is.

Maintenance sub-states

Every device In Maintenance at CORD carries a **sub-state** saying what it is waiting on, so a device cannot sit on the maintenance shelf for months with nobody knowing why. A device starts at Awaiting Evaluation. Devices in maintenance at a depot do not use sub-states.

Sub-state	Who acts next
Awaiting Evaluation	Bench tech. Where every device starts.

Sub-state	Who acts next
Awaiting Parts	The supplier. Record an ETA if you have one.
Awaiting Decision	Tim or a lead: repair or replace.
Repair in Progress	Bench tech.
Ready for Test / QA	Bench tech, then set it In Stock.
Beyond Repair - Pending Decom	Take it to the Decommission form.

To change it, click the device, then **Update Maintenance** in the Maintenance section of the detail panel. The status cell shows how many days the device has been in its sub-state, and the ETA if there is one; an ETA that has passed turns amber. Chips under In Maintenance at the top of the page filter by sub-state, and the In Maintenance report lists them all (chapter 14).

Ready for Test / QA is a reminder, not a gate — it never stops you setting the device In Stock. Admins maintain the list in Admin → Maint. Sub-states.

Editing a device

Click any row to open the detail panel, then **Edit**. You can change any field except three:

- **Serial** is permanent. If a serial is wrong, void the record and receive it again under the correct one.
- **Received by** and **Receive date** are audit fields and are never editable.

Changing a status **to** New Damaged opens a damaged claim and sends the notification, exactly as receiving one does. Changing a status **away from** New Damaged deletes any open claim for that device — IMS warns you before saving.

Moving a device between rack bins is not done through Edit. Use **Put away** or **Move** in the detail panel, or scan it on a bin page, so every move is logged (chapter 7).

Devices inbound to CORD

Devices on their way to CORD, sent in by a tech's Removal in TIA or shipped on a depot pallet, show as In Transit with no depot, under the **Inbound to CORD** chip. (Devices CORD has sent out to a depot have their own **In Transit to Depot** chip.) When one arrives, check it in on Receive Printer. Opening an inbound device on this page shows a **Receive at CORD** button that opens Receive Printer with the serial already filled in.

7. The Warehouse Rack Map

The Rack Map shows where every printer at CORD is sitting, down to the shelf. Open it from the Rack Map link at the top of the Inventory page or in a device's detail panel. Everyone can look; admin and user_full can put devices away and move them.

Bins, zones and placards

Every shelf on a rack is a **bin**, with a code in the form **Area-Rack-Level**: A-3-2 is Area A, rack 3, level 2, and **level 1 is the floor**. Racks are numbered in order through an area. Floor areas that are not racks, such as receiving, are **zones**, with short codes such as RECV.

Each rack has a **placard** on its upright with one row per level. Every row carries a barcode for the handheld scanner and a QR code: point a phone camera at the QR code to open that bin's page.

Opening a bin

1. Open the **Rack Map**. The **Go to bin** box already has the cursor.
2. Scan the placard row for the bin, or type its code, and press Enter. The bin's page opens.

You can also click a bin on the rack drawing. **Find a device** searches serial, asset tag, MercyID or model and tells you which bin each match is in. If a placard is scanned into Find by mistake, IMS opens the bin anyway.

Putting devices away

1. Open the bin by scanning its placard.
2. In **Put away here**, scan each device's serial. Each scan is saved as it lands, and a line under the box confirms it — or explains why IMS could not place it: decommissioned, shipped, listed at a depot, or inbound and not yet checked in. One bad serial never undoes the ones that worked.
3. Moving on to the next shelf? Scan that bin's placard into the same box. The page switches to the new bin, so walking a rack is placard, devices, placard, devices.

Scanning a device that is already in another bin **moves** it here; scanning one that is already here is noted, not treated as an error. You can also put a device away while receiving it (the Bin field on Receive Printer) or from its Inventory detail panel with **Put away**, **Move** or **Take out of bin**.

Reading the map

Pick an area to see its racks drawn level by level, with the number of printers on each shelf. Click a bin to see what is in it. **Unassigned** lists devices checked in at CORD that are not yet in a bin — work through it to keep the map complete.

A bin's usual capacity is a guide only. IMS warns when a shelf holds more than usual but never stops you putting a device there.

Leaving a bin

A device leaves its bin automatically when it is shipped, decommissioned, voided, returned to a vendor, or sent to a depot — nobody has to remember to clear it. The Ship form tells you which bin to pick the device from.

Every move is logged

Each put-away and move is recorded on the bin page's **Recent history**, with who and when. That is why a bin can only be changed through Put away and Move, never by editing the device.

8. Shipping

Shipping a device

1. Choose **Ship**.
2. Enter or scan the serial. IMS loads the device and checks whether it can be shipped. If it is in a bin, IMS tells you where to pick it from — for example, pick from A-3-2.
3. Choose the **ship type** (below).
4. Choose the destination facility. The address fills in automatically.
5. Enter the SCTASK and MDM tracking numbers, and choose the Team Lead to notify. Only people marked as Team Leads appear in the list.
6. Submit. The device leaves inventory and its bin, a shipment record is created, and the Team Lead is emailed.

Ship types

Type	When to use it
PFS	Pull From Stock — a straightforward request filled from warehouse stock.
Project	Part of a planned project deployment.
Break-Fix	Replacing a device that has failed in the field.
Depot Replenishment	Restocking an EPDS depot. The device stays in inventory as In Transit rather than leaving, and both the depot Tech Lead and the Team Lead are notified.

Ship type records **why** a device was sent. It is separate from the project name on the device record, which records what the device was designated for. A device set aside for a project can still ship as PFS, and both facts are kept.

Adding parts to a shipment

After shipping a device, use **Add Part** to send parts with it. The SCTASK, MDM and destination are carried over, and the part shipment is linked to the device shipment. You can add several parts to one shipment.

When shipping is blocked

IMS refuses to ship a device that is not in a fit state to go. The serial lookup shows a red badge explaining why, and the form clears:

Status	Why it is blocked	How to clear it
New Damaged	There is an open damage claim.	Resolve the claim, or change the status back to In Stock.
In Maintenance	It is still being repaired.	Set it to In Stock once the repair is finished.
In Transit	It is already on its way somewhere.	Check it in at its destination first.
Damaged In Transit	A depot reported it damaged.	Close the damaged claim in IMS.

Status	Why it is blocked	How to clear it
Pending Transfer	A tech has staged it for a pallet.	Ship the pallet from TIA, or unstage it there.
Decommissioned	It was retired. IMS says when and by whom as soon as you scan it.	Ask an admin to restore it (Admin → Reverse) if it really is going out.

Looking back at shipments

The **Shipped** page lists every shipment. Besides search and the ship-type chips you can filter by **Team Lead** and by ship date: pick Day, Week, Month or Quarter and step back and forward with the arrows, or choose a date range. Weeks run Sunday to Saturday and quarters are calendar quarters.

To stay quick, the table draws the newest 200 matching rows and says so above the table, with a link to show them all. The counts and **Export CSV** always cover every matching shipment.

9. Decommissioning

Decommissioning retires a device. The record moves out of inventory into the decommission log; it is never simply deleted.

1. Choose **Decommission**.
2. Enter or scan the serial. Device details fill in automatically. If the device has already been decommissioned, a red banner says when and by whom and the submit button is disabled.
3. If the device is on a lease, tick **Is Lease** and complete the lease number and vendor. If it is on the master lease schedule, IMS has already ticked the box and filled them in.
4. Add any notes and submit.

Leased devices

Decommissioning a device marked as a lease automatically creates a **Lease Return** record and emails the lease-return recipients, so the device is returned to the lessor rather than scrapped.

The Decommission form checks the master lease schedule

As soon as you scan a serial, IMS looks it up on the master lease schedule — even a device coming back from the field that IMS has never had in stock. If it is there, **Is Lease** is ticked, the lessor, lease number and expiry are filled in, and a note reminds you not to scrap it before the buyout is settled. A Lease Return is raised when you submit.

Decommissioning a whole pallet

When a pallet of printers arrives for disposal, use **Bulk Decommission** — the link at the top of the Decommission page — instead of submitting one device at a time.

1. Scan or paste the serials into the box, one per line. A handheld scanner starts a new line after each scan by itself. Up to 100 devices per batch; a leading S is removed from every serial.
2. Click **Look up serials**. IMS sorts every device into one of four groups (below).
3. Fill in anything a **Needs info** device is missing, directly on its card, and tick the boxes on any leased device or any device listed at a depot.
4. Optionally add a note for the whole batch, then click **Decommission**.

Group	Meaning
Ready	IMS has everything it needs. It will be decommissioned.
At a depot	IMS still lists it at an EPDS depot. Tick to confirm it has physically arrived at CORD; IMS records the arrival, then decommissions it.
Needs info	A required field is missing, often because IMS has never seen the device. Fill it in on the card.
Blocked	Already decommissioned, or it has an open damaged claim. It is left out of the batch.

Leased devices are never included silently. Each shows an amber note naming the lessor and must be ticked on its own. One Lease Return email covers the whole batch.

Each device is handled separately: if one cannot be decommissioned, the rest still are. The Result step lists what was decommissioned and what was not — nothing changed for those.

When decommissioning is blocked

A device cannot be decommissioned while another workflow owns it. New Damaged is blocked because it has an open claim; In Transit, Damaged In Transit and Pending Transfer are blocked because the depot workflow owns them. The one exception is a device inbound to CORD: decommissioning it counts as checking it in. Choosing Decommission as the status on Receive Printer brings you here with the serial filled in.

10. Damaged Claims (RMA)

A damaged claim tracks a broken device from first report through to the vendor replacing it. Claims are created automatically — you never open one by hand.

How a claim starts

- Receiving a device with the status **New Damaged**.
- Editing a device's status **to** New Damaged.
- A tech marking a depot delivery **Damaged In Transit** in TIA.
- A tech adding a device at a depot already marked Damaged In Transit.

All four fire an email to the damaged-device recipients. The **Device Status** column on the Damaged Claims page tells you which route a claim came from.

The five stages

Stage	Meaning
Reported	The damage has been recorded. This is where every claim starts.
Replacement Ordered	A replacement has been requested from the vendor.
Replacement Received	The replacement has arrived at CORD.
Returned to Vendor	The damaged unit has been sent back.
Closed	The claim is finished. The device is removed from inventory.

Photographs

Photos are the evidence a vendor needs. Take one or two of the damage and attach them to the claim from the Damaged Claims page. Photos taken on a phone are resized automatically before upload, and location data embedded by the camera is stripped.

Exporting an RMA package

Export RMA Package downloads a single ZIP for the vendor containing a one-row CSV of the claim details and the photographs, named by serial. This is the file to send to the vendor or upload to SharePoint.

Closing a claim removes the device and the full-size photos

Closing a claim deletes the device from inventory — it has gone back to the vendor — and permanently removes the **full-resolution** photographs. Small thumbnails are kept forever on the Device Timeline. If photos are attached, IMS asks first and offers **Export & Close** so you can save the RMA package before anything is lost.

11. Lease Returns

The **Lease Returns** page lists devices that must go back to a leasing company. Records are created automatically when a leased device is decommissioned, and can also be added by hand.

Each record carries the lease number, vendor, expiration date and the date the device was actually returned. A return stays open until you record the closed date.

Lease details reach IMS through the Lease Schedule in the Admin Panel — see chapter 17. Because the schedule is stored, a leased device coming back from the field is flagged the moment it is received or decommissioned, even months after the schedule was loaded.

What each record holds

Field	Meaning
Lease number	The leasing company's schedule or contract number.
Lease vendor	The leasing company — HP Financial and CSI Leasing are the two currently in use.
Expiration date	When the lease term ends. This is the date to work back from.
Closed date	When the device was actually returned. Blank means the return is still open.
Notes	Free text. Lease type, term length and start date are recorded here.

Working a return

1. Open **Lease Returns** and sort or filter by expiration date to see what is coming due.
2. Arrange collection with the leasing company.
3. When the device has gone, open the record and set the **closed date**.

A return with no closed date counts towards the **Active Lease Returns** tile on the Dashboard, so that number is a live count of what still has to go back.

Add a return by hand when you need to

Most records appear automatically when a leased device is decommissioned, but you can add one directly from this page — useful for a device that never passed through decommission, or one identified from the lease schedule ahead of time.

12. Parts

Parts are tracked separately from devices because they carry different information — a part number and a part type rather than an asset tag and a MercyID.

- **Receive → Part** brings a part into stock.
- **Ship Part** sends one out, either on its own or linked to a device shipment.
- The **Parts** page lists what is on hand. Click a row for the detail panel and **Edit**.
- Manufacturer and model are free text — parts are not tied to the printer model catalogue, and have no CMDB records.

Sending a part with a device

Parts most often travel with a device. Ship the device first, then use **Add Part** on the confirmation. The SCTASK, MDM tracking and destination are carried across automatically, and the part shipment is linked to the device shipment so the two stay associated in Ship History. Repeat for as many parts as the shipment needs.

To send a part on its own — a replacement tray, say — use **Ship Part** directly and enter the destination yourself.

What makes parts different

	Devices	Parts
Identified by	Serial number	Serial number and part number
In CMDB?	Yes	No
Manufacturer and model	Chosen from the catalogue	Free text
Held at depots?	Yes	No — CORD only
Can be decommissioned?	Yes	No

Because parts are not in CMDB, receiving one does not create or update a CMDB record, and a part will not appear on a Device Timeline.

13. Depot Operations

Seventeen EPDS depot sites hold stock closer to the facilities they serve. Depot stock lives in the same inventory as CORD; the difference is the location on each record.

Who does what

Action	Done in	By
Ship stock from CORD to a depot	IMS	Warehouse staff
Check in a depot delivery	TIA	Field techs
Report a delivery damaged	TIA	Field techs
Add a device directly to depot stock	TIA	Field techs
Send devices back — a whole pallet, or a single device with Ship to...	TIA	Field techs
Check in anything arriving at CORD, whether a pallet or a tech's Removal	IMS (Receive Printer)	Warehouse staff

Sending stock to a depot

Ship the device with the type **Depot Replenishment** and choose the depot. The device does not leave inventory — its location becomes the depot and its status becomes **In Transit**. Both the depot's Tech Lead and the Team Lead are emailed. When the tech checks it in, the status becomes In Stock.

Pallets coming back

A depot returning stock stages the devices as Pending Transfer in TIA, then ships the whole pallet at once under one MDM tracking number. Those devices arrive with the status In Transit and no depot set. Scan each one on Receive Printer and click **Check In Device**, choosing In Stock, In Maintenance or New Damaged, or Decommission.

A device that reaches CORD without a pallet, carried in by a tech for example, still shows at its depot. Receive Printer spots this and offers to move it to CORD once you confirm it is here.

When a tech removes a printer from a facility and sends it to CORD, the Removal records the facility it came from, and the purple banner on Receive Printer shows it.

Depot counts are only as good as the last check-in

Because techs change depot stock in TIA throughout the day, a depot count taken from a spreadsheet goes out of date quickly. Trust IMS over a saved workbook, and never overwrite a depot-managed status from a file.

14. Reports

Choose the report from the tabs, set the filters, then Download CSV; the files open in Excel. Transactions, Month-End Counts and In Maintenance also show their results on screen. Reports are available to admin and user_full.

Report	What it answers
Inventory Summary	What is on hand, grouped by manufacturer, model and status.
Low Inventory	Which models have fallen below their par level.
Ship History	Everything shipped in a date range, filterable by ship type.
Receipt Reconciliation	What was received in a date range. Devices still on their way to CORD are left out until they are checked in.
New Devices / SM	Devices not yet reported to Service Management, with a button to mark them reported. Devices still in transit are left out.
Inventory Forecast	What to order for the coming quarter. See below.
Decommission	Devices retired in a date range, and which ones have already been sent to the team leads for review.
Damaged Claims	Claims and their current stage.
Lease Returns	Lease returns, open and closed.
SM Reconcile	Upload a ServiceNow asset export and see what IMS knows about each serial, so ServiceNow can be corrected from evidence. Changes nothing in IMS.
Transactions	Devices in and out of CORD for a day, week, month or range, plus what is in transit to CORD right now. Also available as a weekday email.
Month-End Counts	One row per month: what was on hand at month-end, and what was received, shipped, decommissioned and opened during it. For quarterly reporting.
In Maintenance	Every device in maintenance now, at CORD (by sub-state, with ETAs) and at the depots, with how long each has waited.

Inventory Forecast

This is the report used to place quarterly orders, so it is worth understanding what it gives you.

Choose whether to report by **individual model** or rolled up by **model class**, set the date range the forecast should learn from, and pick a horizon — a month, a quarter, six months or a year.

Two projections, not one

Each row carries two independent forecasts, and the gap between them is the useful part:

- **Average** — the flat shipping rate over the period you chose, extended across the horizon. Steady and easy to explain, but blind to a change in direction.
- **Trend** — a line fitted to the most recent six months of shipments. It follows a rise or fall that the average would flatten out.

- **Demand direction** — Rising, Falling or Steady, measured over the same six months, so it always agrees with the trend figure.
- **Forecast confidence** — High, Medium or Low, based on how many months actually had shipments. Treat a Low confidence trend as a hint, not a number.

When the two projections agree, the picture is straightforward. When they diverge sharply, that is the signal to look closer: a model showing an average of 21 but a trend of 3 is dying, and one showing 47 against 81 is accelerating.

Suggested order quantity

Suggested order qty takes the higher of the two projections, minus what is in stock. It deliberately leans towards ordering more rather than less: an over-order sits on a shelf that was going to be restocked anyway, while an under-order leaves the warehouse unable to fill a request.

Par qty and **reorder qty** are separate, and are based purely on par levels. They stay at zero until par levels are configured in the Admin Panel. The suggested order quantity works without them.

CORD stock versus depot stock

By default the forecast counts stock everywhere. Tick **Exclude depot inventory** for a CORD-only view. The two answer different questions and can differ sharply — a model may have plenty across the depots while CORD itself is nearly empty.

A note on combining filters

A **Depot Replenishment** shipment is genuine demand on CORD but only an internal move for Mercy as a whole. If you are counting depot stock, consider unticking Depot Replenishment in Ship Types, or the same devices are counted on both sides.

Decommission review

The Decommission report goes to the team leads every few weeks. IMS remembers which devices have already been sent, so each export can carry only the new ones:

- Set **Review Status** to **Not Yet Sent for Review** to export only devices not sent before. The chips show how many are not yet sent and how many are in range.
- After sending the file, click **Mark ... as Sent for Review**. It marks exactly the rows your filters are showing — no more.
- **Undo Last Batch** reverses the most recent mark if it was a mistake.

Transactions and the daily email

The **Transactions** tab lists devices that came into CORD (received, checked in, arrived from a depot, or decommissioned) and went out (shipped or returned to a vendor), with where each one came from when that was recorded, and what is in transit to CORD right now. The same report can be emailed every weekday morning; an admin sets it up in Admin → Notifications.

Month-End Counts

One row per month. The on-hand columns are captured automatically late on the last day of each month, so months before September 2026 show **Not recorded** rather than a guess, and the current month shows live counts. Activity columns are blank for months before IMS tracked that kind of record.

In Maintenance

Every device in maintenance right now. Pick a site — all sites, CORD, or one depot. CORD devices show their sub-state, days in it, ETA (amber once passed) and bin; depot devices are grouped by site. The **since** date says what it rests on: a recorded event, or the receive date when no event exists.

15. Physical Count Audit

The **Audit** page compares a physical count against what IMS believes is on the shelves.

1. Open **Audit** and choose the location you are counting.
2. Scan each device, or paste a list of serials copied from a spreadsheet.
3. IMS shows three groups: matched, **missing** (expected but not scanned) and **unexpected** (scanned but not expected).
4. Download the discrepancy list as CSV to work through.

The audit is a comparison only. It does not change any records — resolve the differences yourself through the normal receive, ship or edit workflows.

Making sense of the results

Result	What it usually means
Missing — expected but not scanned	The device has left without being shipped in IMS, is on a shelf you have not reached yet, or is out for repair. Check the Device Timeline before assuming it is lost.
Unexpected — scanned but not expected	It was received into the wrong location, was shipped in IMS but never physically left, or has come back from the field without being received.

Tips

- **Count one location at a time.** Choose the location filter first — auditing CORD against a depot's shelves will report everything as a discrepancy.
- **Paste works as well as scanning.** If you already have a list in Excel, copy the serial column and paste it in.
- **Expect depot counts to drift.** Techs change depot stock in TIA during the day, so a depot audit is a snapshot. Recount anything surprising before acting on it.
- **Devices in maintenance still count.** They are in stock, just not shippable, so they should be on the shelf.

16. Device Timeline

The **Timeline** page answers "what has happened to this device?". Enter a serial and IMS assembles everything it knows in date order — received, shipped, returned, decommissioned, damaged, transferred between depots, and installs recorded by techs in TIA.

Events that opened a damage claim show thumbnails of the photographs inline; click one to enlarge it. Thumbnails are kept permanently, even after a claim is closed and the full-size images have been removed.

Most pages link through to the Timeline, so you can jump from a device to its full history without retyping the serial.

Where the events come from

The Timeline draws on every part of the system, which is why it can answer questions no single page can:

- **IMS lifecycle events** — received, shipped, returned by an administrator, decommissioned, voided, removed from depot stock, and changes of maintenance sub-state.
- **Depot activity** — checked in at a depot, marked damaged in transit, staged for a pallet, transferred between sites.
- **Damage claims** — when a claim opened, with photo thumbnails attached.
- **Lease returns** — when a return was raised and when it closed.
- **TIA installs** — what a field tech recorded when the device was installed, moved or removed.

Reading a timeline

The card at the top shows what IMS currently knows about the device — asset tag, MercyID, manufacturer, model, status and location — drawn from inventory if it is in stock, and otherwise from the most recent shipment, decommission record or CMDDB entry. Below it, events run in date order.

Historical dates may be estimates

Shipments loaded from the old spreadsheets carry a **Received** event dated roughly a month before the shipment, because the source data had no receive date. Those events say **ESTIMATED DATE** in their description. Every date recorded by IMS itself is exact.

17. Admin Panel

The Admin Panel is visible only to administrators. Its tabs are grouped below by what they are for.

People and notifications

Tab	Purpose
Users	Create, edit, disable and delete accounts, and set roles. Give each person a Display Name (shown wherever a person is picked or listed) and tick Team Lead for anyone who should appear in the Team Lead lists. New users are given a temporary password and must change it at first sign-in. The main admin account cannot be deleted.
Notifications	Choose who is emailed for damaged devices, lease returns, low inventory, depot transfers and depot audits. The Daily Transactions email is set up here too: on or off, send time, the period it covers, and Send test now. Recipients are configured here, never hard-coded.

Reference data

Tab	Purpose
Models	The manufacturer and model catalogue, with each model's class and type. Shared with TIA.
Locations	Facility list behind the shipping address dropdowns. Shared with TIA.
Par Levels	Minimum stock per model class, optionally per model and per depot. These drive the low-inventory email and the Low Inventory report.
Depot Sites	The EPDS depots, each with a Team Lead and a Tech Lead. Adding one here also adds it to the location list.
Maint. Sub-states	The list of maintenance sub-states: add, rename and reorder them, or retire one that is no longer used.

Bulk data

Tab	Purpose
Depot Inv.	Import, view, export and delete stock for one depot at a time.
Ship Import	Load historical shipment records. Additive — a row is skipped if the same serial and ship date already exist.
Inventory / Parts / Decommission	Bulk update, delete and export, with a downloadable template for each. Accepts CSV and Excel.
CMDB	Bulk manage CMDB records. Shared with TIA — coordinate large changes.
Lease Schedule	Load the master lease schedule. See below.

Warehouse

The **Warehouse** tab sets up the racks that the Rack Map draws.

- **+ Add Area** — give it a code of one to three letters (I and O are not allowed; they read as 1 and 0 on a label) and, optionally, how many racks and levels to generate. Every bin is created for you.
- **Edit a rack** to change its levels, how many devices sit across the front of a level and how many deep, and tick **Labelled, populated and trusted** once its placard is up and it is filled.
- **+ Add Zone** for floor areas that are not racks, such as receiving. A zone code cannot look like a rack bin.
- **Print Placards** prints a 3 × 11.5 in placard for each rack — one row per level, each with a barcode and a QR code. Print at actual size.

Racks and bins are retired, never deleted. Renaming an area rewrites its bin codes, and the devices follow.

Reverse

The **Reverse** tab undoes mistakes, and every reversal is logged with who did it, when and why:

- **Return to Inventory** — a device was shipped in error.
- **Restore from Decommission**: a device was retired in error. Its lease details come back with it. Do this before receiving a decommissioned device that is going back into stock.
- **Void Inventory Item** — a device was received in error.

Lease Schedule

Drop the leasing company's schedule — Excel or CSV — into the box. IMS stores every row and fills in the lease details on any matching device currently in stock. The vendor's own column headings are understood, so the file needs no editing first.

- **Update** loads or refreshes the schedule and applies it.
- **Delete** removes serials from the schedule **and** clears the lease details from those devices. Use this for a buyout.
- **Export** downloads the stored schedule.

Most rows will match nothing in stock, and that is expected — the schedule covers devices out at facilities too. It is kept precisely so that a leased device received months later still picks up its details automatically.

Importing is additive and never erases

Importing a schedule that contains only new devices adds those and leaves every other record untouched. A field the file does not contain keeps whatever value it already had, so a partial schedule cannot wipe details you loaded earlier. Because of that, blanking a cell does **not** clear a field — use **Delete** and re-import instead.

18. Rules the System Enforces

Some behaviour is deliberate and cannot be overridden. Knowing these saves time when something appears not to work.

Records are never deleted

Devices move between states — received, shipped, decommissioned, returned. Nothing is erased. Where a record genuinely has to go, IMS writes a lifecycle event first so the Device Timeline keeps the story. Bulk delete in the Admin Panel is the single exception, and it is deliberate.

Serials are normalised automatically

- Always converted to **UPPERCASE**.
- A leading S is removed from any serial on Receive Printer, Ship and Decommission, and from Lexmark serials everywhere else.
- Spaces are removed from **MercyIDs**.

A device can only be in one place

A serial cannot be received twice, cannot be both in stock and decommissioned, and cannot be shipped while another workflow owns it. A decommissioned device cannot be received until an administrator restores it. Where these overlap, IMS blocks the action and explains why rather than guessing.

Emails are sent automatically

When	Who is emailed
A device is received or edited as New Damaged	Damaged-device recipients
A depot reports a delivery Damaged In Transit	Damaged-device recipients
A leased device is decommissioned	Lease-return recipients (one email per batch on Bulk Decommission)
Stock falls below its par level	Low-inventory recipients
A device is shipped	The Team Lead chosen on the form
A device is shipped to a depot	The depot's Tech Lead and the Team Lead
A depot ships a pallet	Depot-transfer recipients
Every weekday morning, if turned on	Daily Transactions recipients
A tech sends a depot audit from TIA	The depot's Team Lead and the depot-audit recipients

19. Troubleshooting

Symptom	Cause and fix
Returned to the login page unexpectedly	Your session expired, or the connection dropped briefly. Sign in again.
Something new is missing right after an update	Your browser is still showing the old page. Close the IMS tab completely and open it again — especially on a phone.
A menu item is missing	Your role does not include it. Ask Tim if you need broader access.
"Already in CORD inventory" when receiving	The device has been received already; the banner says when and by whom. Check whether you are holding a different unit, or change its status on the Inventory page.
The Receive button is greyed out	The banner says why: the device is already at CORD, it is decommissioned, or it is listed at a depot and you have not ticked This device is here at CORD.
A device arrives but is not showing as Inbound	Scan it on Receive Printer anyway. If a depot still lists it, IMS offers to move it; otherwise it is received as a return from the field.
A red badge blocks shipping	The device's status prevents it. See the table in chapter 8 for how to clear each one.
Cannot decommission a device	It has an open damage claim, the depot workflow owns it, or it is already decommissioned. See chapter 9.
Cannot save a device In Maintenance	Choose a Maintenance Sub-state. Every device in maintenance at CORD needs one.
"There is no bin ..."	The code was mistyped, or that rack has not been set up yet. Check the placard, or ask an admin.
A placard was scanned into the wrong box	No harm done: the Rack Map's Find box and a bin page's Put away box both recognise a bin code and open that bin.
Shipped shows only 200 rows	The table draws the newest 200 to stay quick. The counts and Export CSV cover them all; use the show-all link to see every row.
Scan button missing	Camera scanning is for phones and tablets. At a laptop, use the handheld scanner or type the serial.
Lease fields empty on a leased device	The device is not in the loaded lease schedule. Import the current schedule from the Admin Panel.
Report opens with no rows	The filters exclude everything. Widen the date range or clear a filter.
Reorder qty is zero for everything	Par levels have not been set. Use the suggested order quantity, which does not need them.

If something looks wrong with the data itself rather than the application, note the serial and what you expected, and raise it with Tim. Do not work around it by receiving a device twice or editing a serial.

20. Glossary

Term	Meaning
CORD	The IT Asset Warehouse at Earth City, Missouri — the main stock location.
EPDS	The depot sites holding stock closer to the facilities they serve.
CMDDB	Configuration Management Database — the shared asset register, used by both IMS and TIA.
TIA	Tech Install Application — the field techs' system, sharing a database with IMS.
MercyID	Mercy's identifier for a device, distinct from the asset tag.
SCTASK	A ServiceNow catalogue task number.
MDM	The shipment tracking number.
PFS	Pull From Stock — a device supplied from warehouse stock.
Par level	The minimum quantity that should be held before reordering.
RMA	Return Merchandise Authorisation — the vendor process for a damaged device.
FMV / \$OUT	Lease types. FMV is fair market value; \$OUT is a buyout lease.
Bin	A shelf on a CORD rack, coded Area-Rack-Level — A-3-2 is Area A, rack 3, level 2 (level 1 is the floor).
Zone	A named floor area that is not a rack, such as receiving.
Placard	The card on a rack upright listing its bins, each with a barcode and a QR code.
Sub-state	What a device in maintenance at CORD is waiting on.
Wedge scanner	A handheld barcode scanner that types what it scans into the field with the cursor.

End of guide.