

EVERYDAY TASKS

Receive a device	Receive → Printer → scan serial → read the banner → set status → scan the bin → Submit. New, returning and inbound devices alike
Receive a part	Receive → Part → part number, type, mfr, model → Submit
Ship a device	Ship → scan serial → ship type → facility → SCTASK + MDM → Team Lead → Submit
Add a part to a shipment	After shipping, Add Part. SCTASK, MDM and address carry over
Decommission	Decommission → scan serial → check Is Lease → Submit. A whole pallet: Bulk Decommission
Restock a depot	Ship with type Depot Replenishment → pick the depot
Check in an inbound device	Receive → Printer → scan serial → set status → Check In Device (pallets and TIA Removals)
Find a device's history	Timeline → enter serial
Count the shelves	Audit → pick location → scan or paste → download discrepancies

STATUSES

In Stock	Available to ship
In Maintenance	Being repaired — cannot ship. At CORD: has a sub-state
New Damaged	Arrived damaged — has an open claim
In Transit	Sent to a depot, or on its way to CORD; not yet checked in
Damaged In Transit	A depot reported it arrived damaged
Pending Transfer	A tech has staged it for an outbound pallet

The last three are set by the depot workflow — you cannot choose them yourself.

HOW IMS CLEANS UP WHAT YOU TYPE

Serial	UPPERCASE. A leading S is removed: any make on Receive, Ship, Decom
MercyID	All spaces removed
Manufacturer / model	Picked from the catalogue; free text allowed

WHY IS THIS BLOCKED?

Cannot ship — New Damaged	Open claim. Resolve it, or set In Stock
Cannot ship — In Maintenance	Under repair. Set In Stock when done
Cannot ship — In Transit	Already on its way. Check it in first
Cannot ship — Damaged In Transit	Close the damaged claim in IMS
Cannot ship — Pending Transfer	On a pallet list. Unstage it in TIA
Cannot decommission	Open claim, or depot workflow owns it
Receive button greyed out	Already here, retired, or at a depot
Says Decommissioned	Retired already. An admin can restore it

SHIP TYPES

PFS	Pull From Stock — a straightforward request
Project	Part of a planned deployment
Break-Fix	Replacing a device that failed in the field
Depot Replenishment	Restocking an EPDS depot — stays in inventory as In Transit

ROLES

admin	Everything, including the Admin Panel and reversals
user_full	Receive, ship, decom, put away, parts, reports, audit
user_basic	Read-only. No Receive, Ship, Decommission, Reports or Audit

DEPOTS — WHICH APP DOES WHAT

IMS (warehouse)	Ship stock out to a depot · check in anything arriving at CORD on Receive Printer
TIA (field techs)	Check in a delivery · report damage · add a device · stage a pallet back

RACK MAP & BINS

Bin code	A-3-2 = Area A, rack 3, level 2 (1 = floor)
Open a bin	Rack Map → scan the placard into Go to bin
Put away / move	On the bin page, scan each serial — saved as it lands
Unassigned	Checked in at CORD but not yet in a bin

WHICH REPORT DO I WANT?

What is on the shelf?	Inventory Summary
What is running low?	Low Inventory
What did we ship?	Ship History
What did we receive?	Receipt Reconciliation
What came in and went out?	Transactions
What is not in ServiceNow yet?	New Devices / SM
What should we order?	Inventory Forecast
What did we retire?	Decommission
What is broken?	Damaged Claims
What goes back to the lessor?	Lease Returns
Month-end numbers?	Month-End Counts
What is stuck in maintenance?	In Maintenance
Does ServiceNow agree?	SM Reconcile

READING THE FORECAST

Average	Flat rate over the horizon; misses a turn
Trend	Line fitted to the last 6 months
Demand direction	Rising / Falling / Steady, same 6 months
Confidence	High / Medium / Low. Treat Low as a hint
Suggested order qty	The higher of the two, minus stock
Par / reorder qty	Par-based; zero until par levels are set

When the two projections disagree sharply, that is the signal — not a fault.

JARGON

CORD	The IT Asset Warehouse, Earth City MO
EPDS	The depot sites holding stock near the facilities
CMDB	Shared asset register, used by IMS and TIA
TIA	Tech Install Application — the field techs' system
MercyID	Mercy's device identifier, not the asset tag
SCTASK / MDM	ServiceNow task number / shipment tracking number
Par level	Minimum quantity to hold before reordering

RULES THE SYSTEM ENFORCES

- Serials are forced to **UPPERCASE**; a leading **S** is stripped (any make on Receive, Ship and Decommission, Lexmark elsewhere); spaces are removed from MercyIDs.
- Serial, Received by and Receive date can never be edited.** If a serial is wrong, void the record and receive it again.
- Nothing is deleted.** Devices move between states, and a lifecycle event is written before any record is removed.
- A device cannot be received twice, or be in stock and decommissioned at once. A decommissioned device needs an admin restore before it can be received.
- Setting a status to **New Damaged** opens a claim and emails the recipients — on receive and on edit alike.
- Closing a damaged claim removes the device and its full-size photos.** Export the RMA package first.

AUTOMATIC EMAILS

New Damaged	Damaged-device recipients
Damaged In Transit	Damaged-device recipients
Leased device decommissioned	Lease-return recipients
Stock below par	Low-inventory recipients
Device shipped	The Team Lead on the form
Shipped to a depot	Depot Tech Lead + Team Lead
Depot pallet shipped	Depot-transfer recipients
Weekday morning (if on)	Daily Transactions recipients

QUICK FIXES

Sent back to login	Session expired — sign in again
Menu item missing	Your role does not include it
Missing after an update	Close the tab completely, then reopen it
Scan button missing	Camera scan is phone-only; use the handheld
Report has no rows	Filters exclude everything — widen the date range
Reorder qty all zero	Par levels not set. Use suggested order qty instead
Can't save In Maintenance	Choose a sub-state first