GRANITE SURE STEP METHODOLOGY (GSSM) V 1.2

Granite Team | Infrastructure/Networking Team | Implementation, setup / configuration step

Customer Team | Customer ERP Team | Live operational step

GRANITE WAREHOUSE MANAGEMENT SYSTEM

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A Diagnose

- A1 Business requirements discussion
- A2 Site walk through
- A3 Hardware requirements

B Analyse

- B1 Business process flows
- B2 Customisation requirements & specification
- B3 Integration requirements & specification
- B4 Label requirements
- B5 Document requirements

C Install & Configure

C1 Equipment / Consumables

- C1A Wi-Fi network
- C1B Application / Database server supplied
- C1C Mobile devices setup & QC
- C1D Label printers setup & QC
- C1E Ribbons & labels supplied
- C1F Location, product label designs

C2 Install GraniteWMS

- C2A Database configuration
- C2B Web service install
- C2C Web application install
- C2D Bartender server install
- C2E Services installs
- C2F Desktop application install

C3 Processing Rules

- C3A Configure master data (items,locations)
- C3B Configure downward integration
- C3C Configure processes
- C3D Design views & form contents
- C3E Configure upward integration
- C3F Design custom reports
- C3G Custom development & configuration

C4 Testing

- C4A Label locations & racks
- C4B Inbound processes
- C4C User groups & permissions
- C4D Label goods on arrival
- C4E Stock management processes
- C4F Outbound processes
- C4G Reporting

D Training (Super Users)

- D1 Desktop & master data
- D2 Inbound processes
- D3 Stock management processes
- D4 Outbound processes
- D5 Supervisor / management processes
- D6 Reporting
- D7 Publish training manuals & video tutorials

E Go Live

- E1 Label goods & locations without labels
- E2 Inbound processes
- E3 Stock management processes
- E4 Outbound processes
- E5 Supervisor / management processes
- E6 Reporting
- E7 Operational hand holding

F Support, Maintenance, Improvement

- F1 Training updates
- F2 Process improvements
- F3 Standard Support
- F4 Priority Support

Individuals and interactions over processes and tools -- **Working software** over comprehensive documentation -- **Customer collaboration** over contract negotiation -- **Responding to change** over following a plan

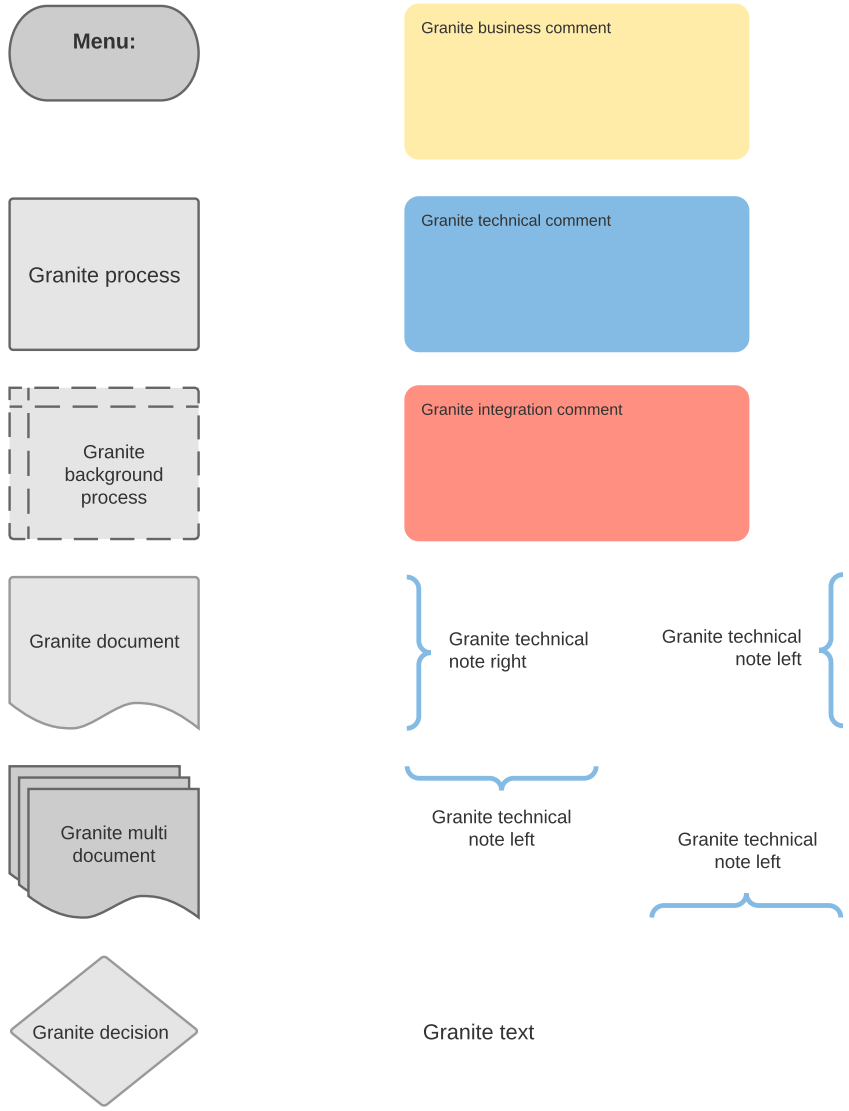
PROCESS OVERVIEW

May 26, 2021

Warehouse

Menu Description	Granite Process	Granite Type
Takeon	TAKEON	TAKEON
Receiving	RECEIVING	RECEIVING
ReceivingPost	RECEIVINGPOST	RECEIVINGPOST
Putaway	PUTAWAY	MOVE
Return	RETURN	RETURN
Manufacture	MANUFACTURE	MANUFACTURE
ManufacturePost	MANUFACTUREPOST	MANUFACTUREPOST
Consume	CONSUME	CONSUME
ConsumePost	CONSUMEPOST	CONSUMEPOST
Picking	PICKING	PICKING
Picking Post	PICKINGPOST	PICKINGPOST
Unpick	UNPICK	LOOKUP
Transfer	TRANSFER	TRANSFER
TransferPost	TRANSFERPOST	TRANSFERPOST
Stock Take	STOCKTAKE	STOCKTAKE
Stock Take Hold	STOCKTAKEHOLD	STOCKTAKEHOLD
Move	MOVE	MOVE
Adjustment	ADJUSTMENT	ADJUSTMENT
Palletize	PALLETIZE	PALLETIZE
Split	SPLIT	SPLIT
Replenish	REPLENISH	REPLENISH
Reclassify	RECLASSIFY	RECLASSIFY
Scrap	SCRAP	MOVE
QC Control	QCCONTROL	QCCONTROL
Lookup	LOOKUP	LOOKUP
Label Print	LABELPRINT	LOOKUP

Process key map



1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

TAKEON

GRANITE PROCESS TYPE = TAKEON

May 26, 2021

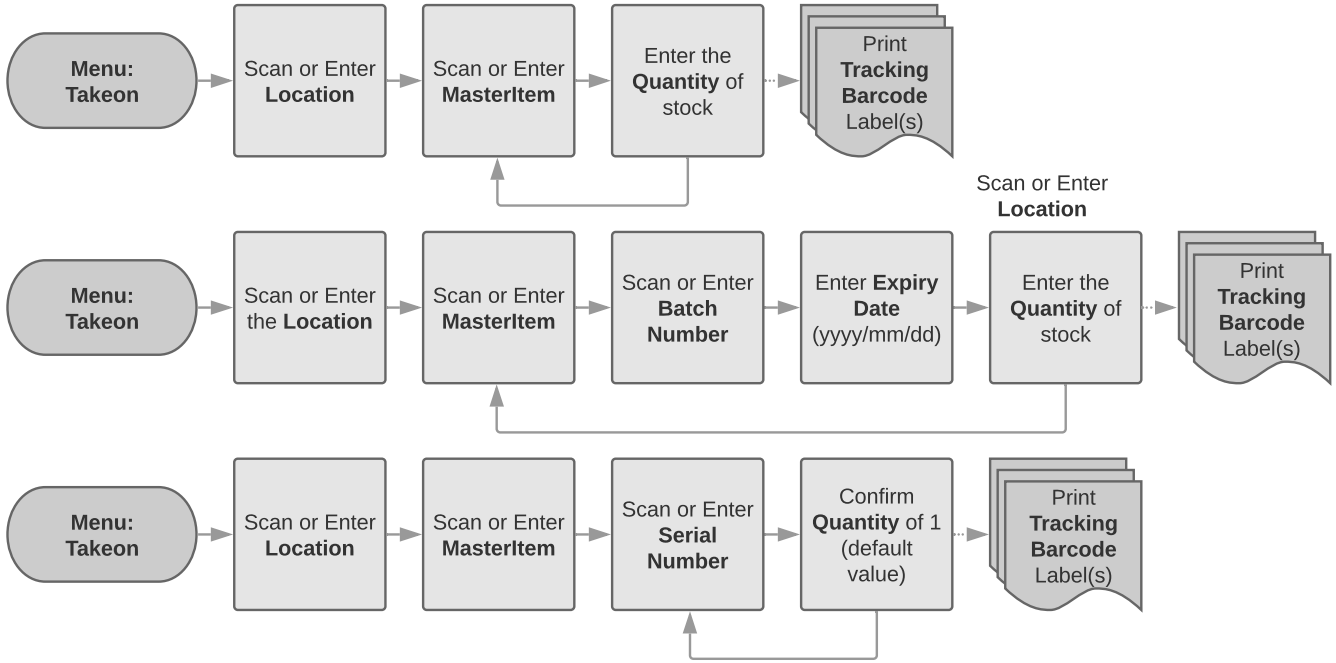
BUSINESS

Existing stock is added to the system

PHYSICAL

Operators use Granite to scan Items into the system → Goods are labeled with tracking barcodes using Granite → Stock is moved into the warehouse receiving location

GRANITE OPERATOR



The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

Post Document confirmation to ERP

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

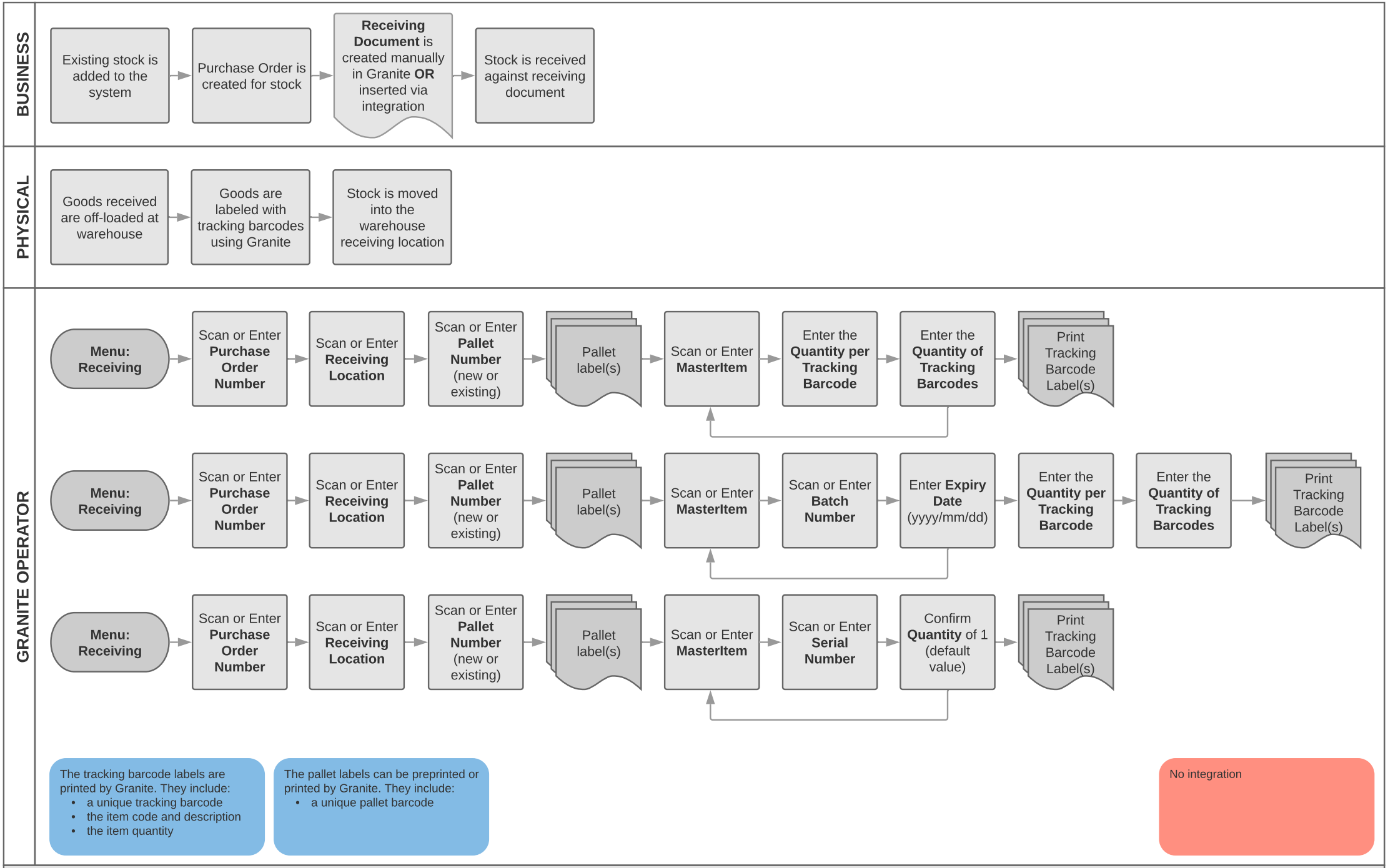
Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

RECEIVING

GRANITE PROCESS TYPE = RECEIVING

May 26, 2021



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6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

RECEIVINGPOST

GRANITE PROCESS TYPE = RECEIVINGPOST

May 26, 2021

BUSINESS

Post received lines for a Receiving Document

PHYSICAL

Post received goods using Granite

GRANITE OPERATOR

Menu: ReceivingPost → Scan or Enter **Purchase Order Number**

Optional:
- Print GRN

Post Document confirmation to ERP

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

PUTAWAY

GRANITE PROCESS TYPE = MOVE

May 26, 2021

BUSINESS

Stock is put away after receiving or a return

OR
Stock requires movement within the warehouse

PHYSICAL

Operator moves stock physically → Operator performs the Move process on a scanner

GRANITE OPERATOR

Menu: Putaway → Scan or enter the destination **Location Code** → Scan the **Granite Barcode** (pallet or tracking)

Post move journal only if ERP location has changed

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

RETURN

GRANITE PROCESS TYPE = RETURN

May 26, 2021

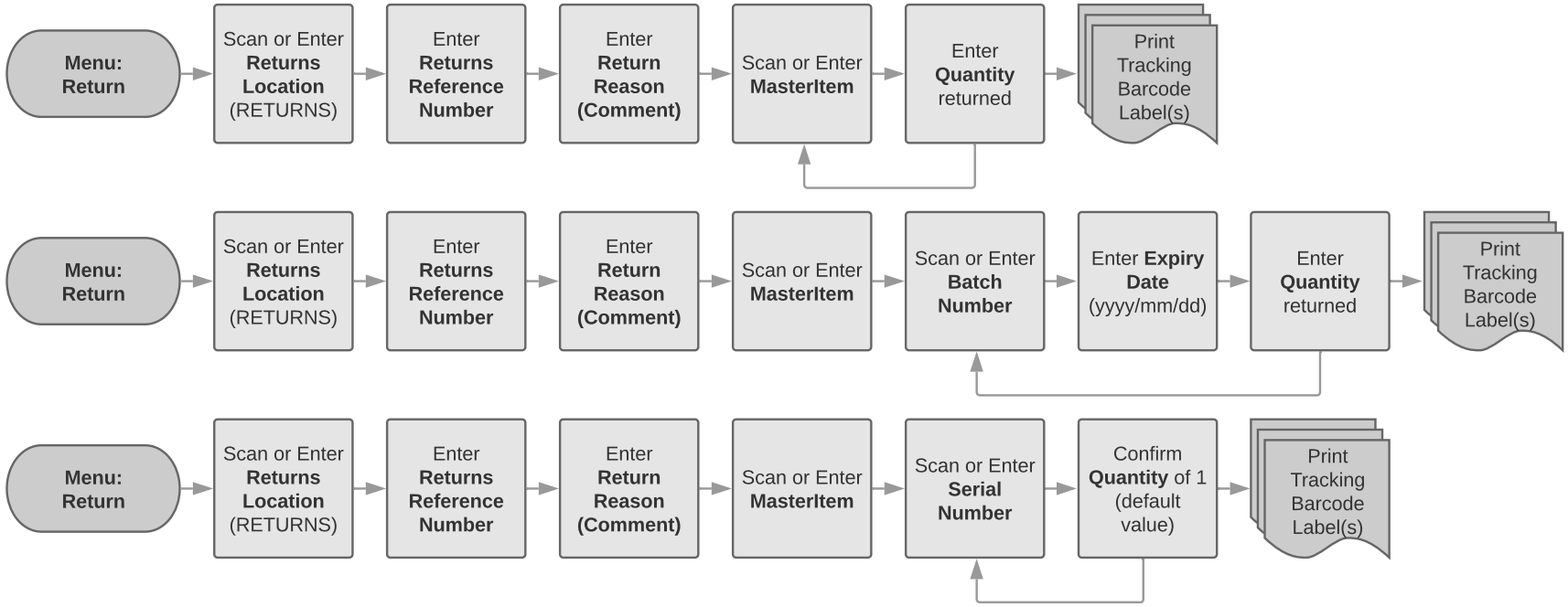
BUSINESS

- Goods are returned from Customers
- Goods are physically checked against POD and Purchase Order
- Item details such as item code, quantity and condition are checked
- Operator documents the date the stock was received, the client that the stock was received from, Document numbers,referral numbers
- Stock is returned using Granite
- Documents compiled by return operator are sent to accounts

PHYSICAL

- Operator performs Returns process on scanner
- Goods are labeled with tracking barcodes using Granite
- Operator books stock into Returns locations

GRANITE OPERATOR



The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

MANUFACTURE

GRANITE PROCESS TYPE = MANUFACTURE

May 26, 2021

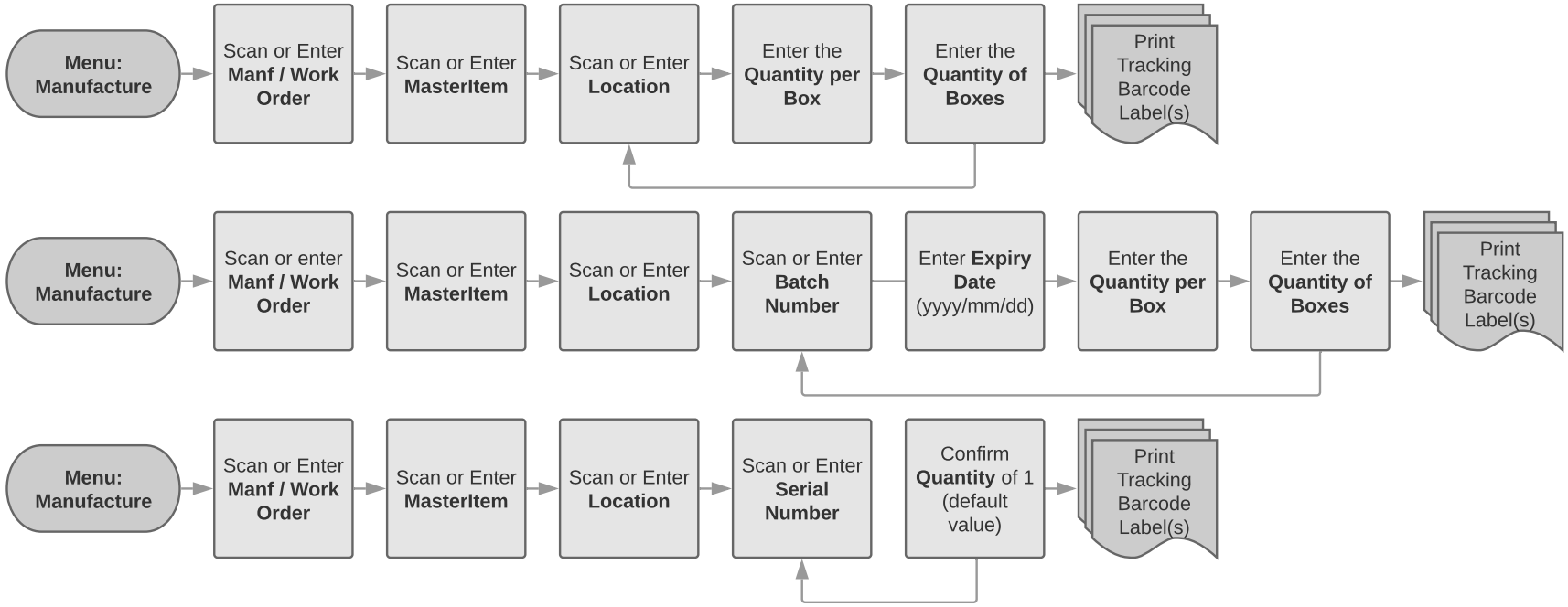
BUSINESS

An order for production of an item has been requested → Manufacturing / Work Order is created for stock → Manufacturing Document is created manually in Granite OR inserted via integration → Production is performed

PHYSICAL

Operator performs Manufacturing process on scanner → Goods are labeled with tracking barcodes using Granite → Operator books stock into specified location

GRANITE OPERATOR



The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

MANUFACTUREPOST

GRANITE PROCESS TYPE = MANUFACTUREPOST

May 26, 2021

BUSINESS

Post lines for a Manufacturing Document

PHYSICAL

Post manufactured goods using Granite

GRANITE OPERATOR

Menu: ManufacturePost → Scan or Enter **Manf / Work Order Number**

Optional:
- Print Manufacture Report

Limited / custom integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

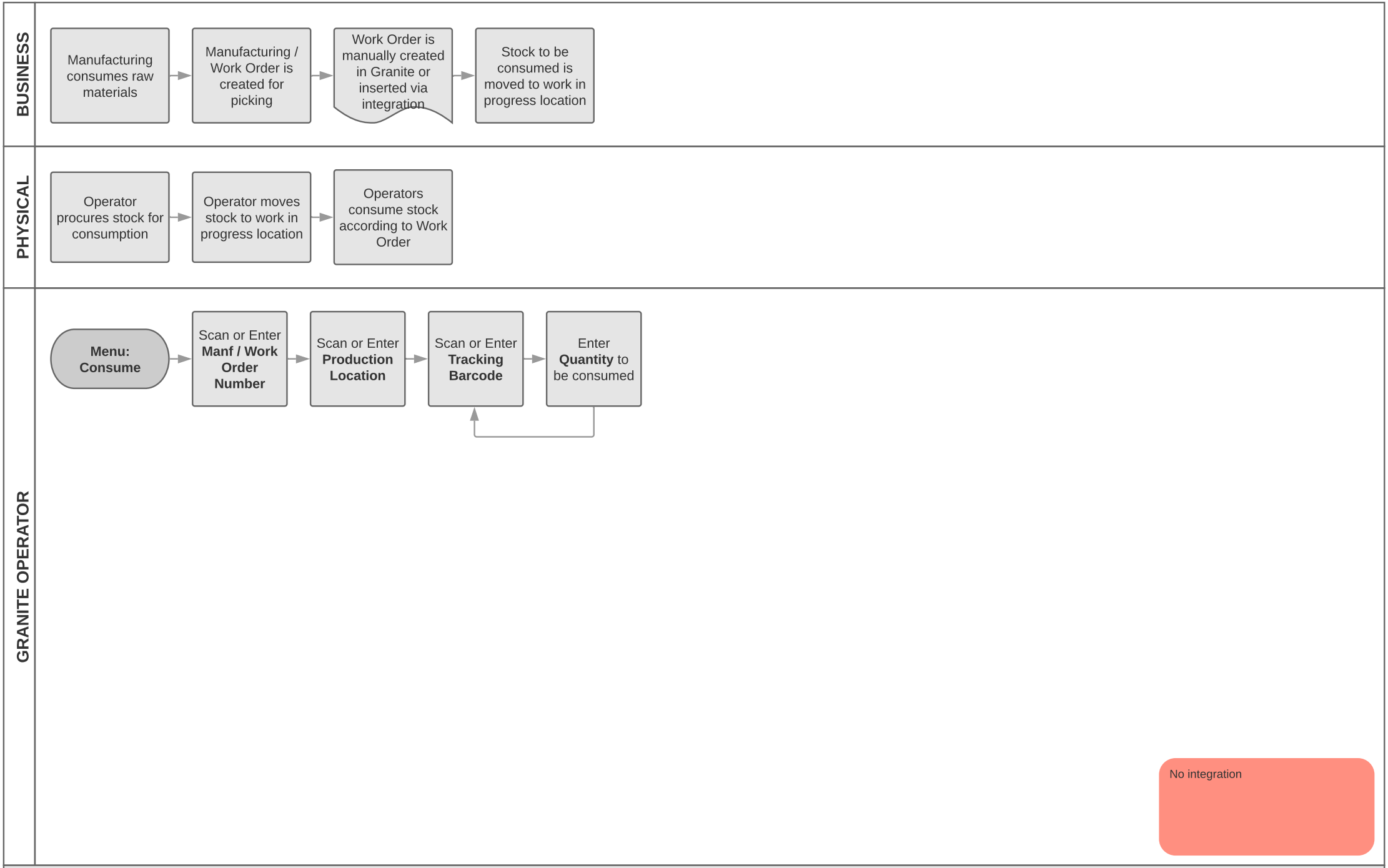
Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

CONSUME

GRANITE PROCESS TYPE = CONSUME

May 26, 2021



1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

CONSUMEPOST

GRANITE PROCESS TYPE = CONSUMEPOST

May 26, 2021

BUSINESS

Post consumption of materials a Manufacturing Document

PHYSICAL

Post consumed goods using Granite

GRANITE OPERATOR

Menu: ConsumePost → Scan or Enter **Manf / Work Order Number**

Optional:
- Print Consumption Report

Limited / custom integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

PICKING

GRANITE PROCESS TYPE = PICKING

May 26, 2021

BUSINESS

- Goods are required by trading partner
- Sales Order is created for picking
- A Sales Order is manually created in Granite or inserted via integration
- Pickslip is printed by Warehouse
- Goods are Picked against the Sales Order and dispatched

PHYSICAL

- Pickslip is handed to picker
- Stock is physically checked against all items details on pickslip
- Stock is Picked using Granite scanner
- Stock is staged for dispatch

GRANITE OPERATOR

- **Menu: Picking**
- Scan or enter **Sales Order**
- Scan or Enter **Dispatch Location**
- Scan or enter **Tracking Barcode**
- Enter **Qty** to be picked
- Print **Tracking Barcode** Label(s)

Partial pick from existing Tracking Barcode creates a new barcode for quantity picked

The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

No integration

1. **Reviewed with customer**
2. **Configured in Granite**
3. **Customer review / test**
4. **Customer approval / acceptance**
5. **Super user training complete**
6. **Process in production**

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

PICKINGPOST

GRANITE PROCESS TYPE = PICKINGPOST

May 26, 2021

BUSINESS

Post picked lines for a Sales Document

PHYSICAL

Post picked goods using Granite

GRANITE OPERATOR

Menu: Check and PickingPost → Scan or enter **Sales Order** → Display picked details and confirm correct (Yes/No)

Optional:
- Print D/N
- Print Packing slip

Post Document confirmation to ERP

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

UNPICK

GRANITE PROCESS TYPE = LOOKUP

May 26, 2021

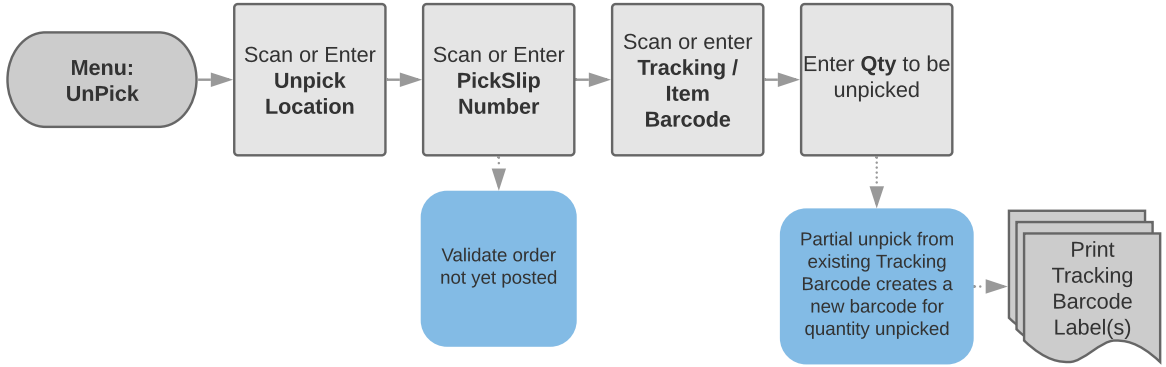
BUSINESS

Goods are identified as incorrectly picked → Sales Order cannot be posted yet

PHYSICAL

Stock is Picked using Granite scanner → Stock is labeled and placed in Unpick location

GRANITE OPERATOR



Tracking barcodes in Unpick location must be moved / replenished to stock in the warehouse

The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

TRANSFER

GRANITE PROCESS TYPE = TRANSFER

May 26, 2021

BUSINESS

- Stock to be transferred to another warehouse/store
- A Transfer Document is created for stock
- Transfer Document is created manually in Granite OR inserted via integration
- Receipt of stock is performed in Granite

PHYSICAL

- Goods are identified in the warehouse
- Goods are physically checked against Transfer Document
- Goods scanned against Transfer Document are Transferred to destination OR moved to Intransit location
- Goods are scanned against Transfer Document with Receipt type to new warehouse

GRANITE OPERATOR

Menu: Transfer

Menu: Transfer Type

Transfer:
- Scan or Enter **Transfer Document**
- Scan or Enter **Destination Location**
- Scan **Tracking Barcode**
- Enter the **Quantity** to Transfer from that barcode

Intransit:
- Scan or Enter **Transfer Document**
- Scan or Enter **Intransit Location**
- Scan **Tracking Barcode**
- Enter the **Quantity** to Transfer from that barcode

Receive:
- Scan or Enter **Transfer Document**
- Scan or Enter **Destination Location**
- Scan **Tracking Barcode**
- Confirm **Quantity** (or modify to accept less)

Partial quantity from existing Tracking Barcode creates a new barcode for quantity entered

The tracking barcode labels are printed by Granite. They include:
- a unique tracking barcode
- the item code and description
- the item quantity

Post move journal / batch only if ERP location has changed
OR
Post Document confirmation to ERP

1. **Reviewed with customer**
2. **Configured in Granite**
3. **Customer review / test**
4. **Customer approval / acceptance**
5. **Super user training complete**
6. **Process in production**

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

TRANSFERPOST

GRANITE PROCESS TYPE = TRANSFERPOST

May 26, 2021

BUSINESS

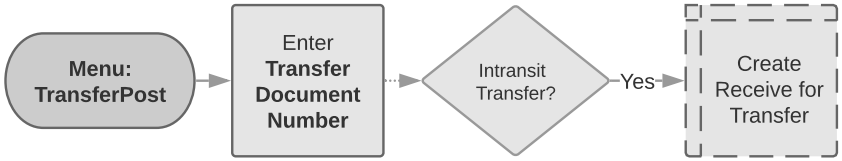
Post picked lines for a Transfer Document

OR
Post received lines for a Transfer Document

PHYSICAL

Post transferred goods using Granite

GRANITE OPERATOR



Optional:
- Print Delivery Note

Post Document confirmation to ERP

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

STOCK TAKE

GRANITE PROCESS TYPE = STOCK TAKE

May 26, 2021

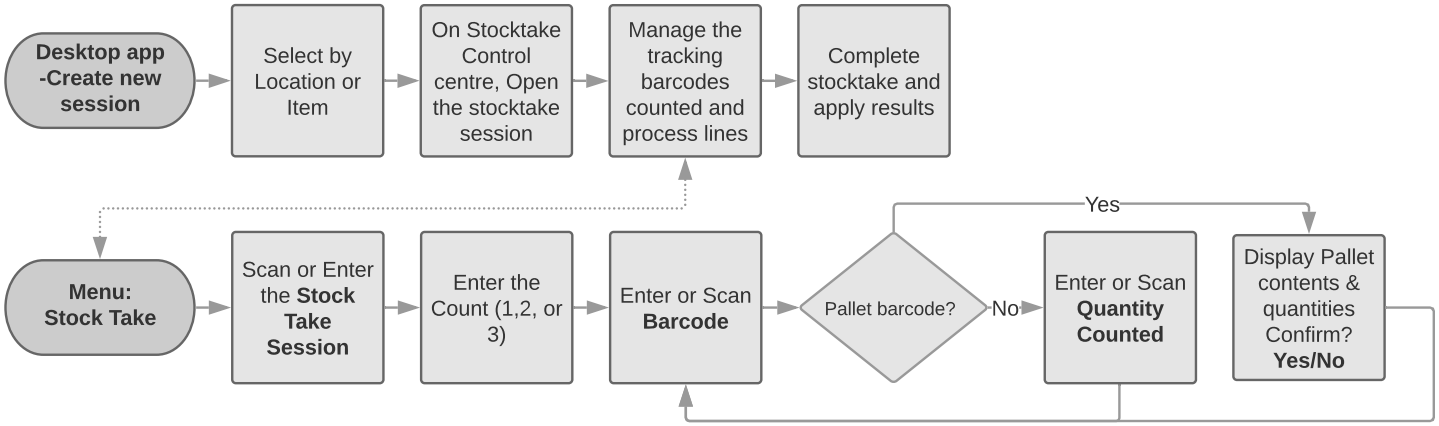
BUSINESS

Stock is physically verified in warehouse against recorded inventory levels

PHYSICAL

Stock levels are verified using Granite Scanner

GRANITE OPERATOR



If Tracking Barcode quantity in a pallet is incorrect, confirm the pallet as is, and scan specific Tracking Barcode to adjust quantity

If Tracking Barcode is missing from pallet, use Desktop Application to scrap the Tracking Barcode

Integration Note:
The Stocktake fixes the physical quantities in Granite, matched to TrackingEntities.
There are two ways to process into SAGE.
Option 1: Accept that all Granite Quantities are correct, extract Actual Qty on Hand from Granite into an Import file which gets imported as a count sheet into ERP.
Option 2: Extract the report of Adjustments made in Granite stock count and import those counts into a ERP stock count.

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

STOCK TAKE HOLD

GRANITE PROCESS TYPE = STOCK TAKE HOLD

May 26, 2021

BUSINESS

Stock is physically verified in warehouse against recorded inventory levels

PHYSICAL

Update all stock in selected area / locations to QC Hold → Operator performs the StockTake process on a scanner

GRANITE OPERATOR

Menu: Stock Take Hold → Scan or Enter **Tracking Barcode** → Provide a **Comment**

Stock not found (remain on hold) are to be managed and ultimately released or scrapped

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

MOVE

GRANITE PROCESS TYPE = MOVE

May 26, 2021

BUSINESS

Stock is put away after receiving or a return

OR
Stock requires movement within the warehouse

PHYSICAL

Operator moves stock physically → Operator performs the Move process on a scanner

GRANITE OPERATOR

Menu: Move → Scan or enter the destination **Location Code** → Scan or Enter **Barcode** (pallet or tracking)

Post move journal only if ERP location has changed

1. **Reviewed with customer**
2. **Configured in Granite**
3. **Customer review / test**
4. **Customer approval / acceptance**
5. **Super user training complete**
6. **Process in production**

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE
WAREHOUSE MANAGEMENT SYSTEM

ADJUSTMENT

GRANITE PROCESS TYPE = ADJUSTMENT

May 26, 2021

BUSINESS

Physical stock quantity does not match quantity in granite

PHYSICAL

Count physical stock → Warehouse Manager to send Stock Controller details → Stock Controller to investigate variance using Granite Desktop & ERP → If required, obtain approval for an adjustment → Adjust in Granite → Adjust in ERP if no integration is active

GRANITE OPERATOR

Menu: Adjustment → Select **Type** of Adjustment Increase or Decrease? → Enter the **Reason** → Scan **Tracking Barcode** → Enter the **Quantity** to adjust → **Confirm** the Information on the screen is correct

Post adjustment journal

1. **Reviewed with customer**
2. **Configured in Granite**
3. **Customer review / test**
4. **Customer approval / acceptance**
5. **Super user training complete**
6. **Process in production**

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

PALLETIZE

GRANITE PROCESS TYPE = PALLETIZE

May 26, 2021

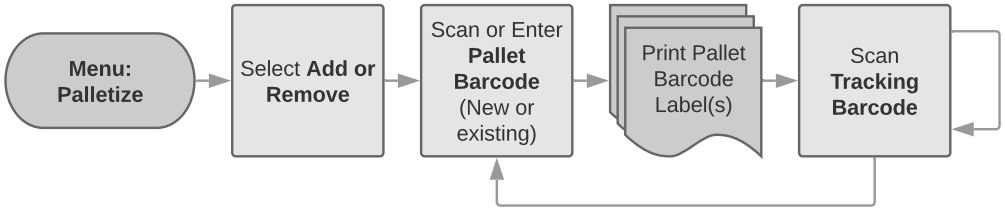
BUSINESS

Link Tracking Barcodes to a Pallet / Box Number → All future scans in Granite can use pallet or Tracking Barcode

PHYSICAL

Operator performs the Palletize process on a scanner

GRANITE OPERATOR



Tracking Barcode linked / de-linked with Pallet barcode

The pallet labels can be preprinted or printed by Granite. They include:

- a unique pallet barcode

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

SPLIT

GRANITE PROCESS TYPE = SPLIT

May 26, 2021

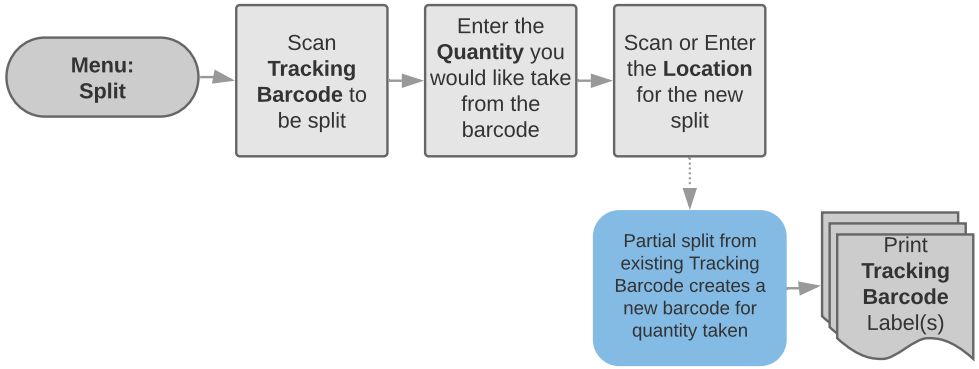
BUSINESS

Stock needs to be split into multiple Tracking Barcodes

PHYSICAL

Stock is split into multiple Tracking Barcodes

GRANITE OPERATOR



The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

REPLENISH

GRANITE PROCESS TYPE = REPLENISH

May 26, 2021

BUSINESS

- Take stock from one Tracking Barcode and move to another Tracking Barcode
- Stock from multiple barcodes will be consolidated into a single barcode
- A pick face or picking location needs to be topped up on demand

PHYSICAL

- Take stock from one Tracking Barcode and move to another Tracking Barcode
- → Operator performs the Replenish process on a scanner

GRANITE OPERATOR

Menu: Replenish → Scan from **Tracking Barcode** → Enter the **Quantity** from the barcode → Scan or Enter the **Location** to replenish to → Scan to **Tracking Barcode**

No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

RECLASSIFY

GRANITE PROCESS TYPE = RECLASSIFY

May 26, 2021

BUSINESS

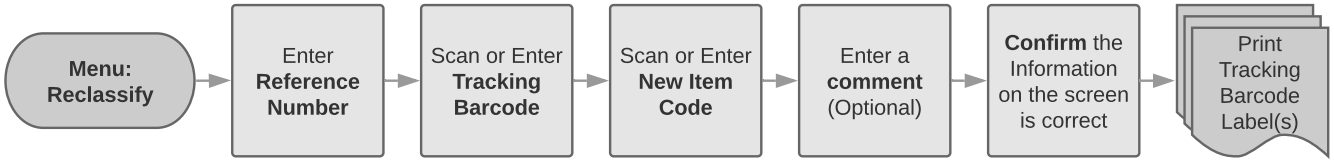
A Tracking Barcode with Quantity needs to change to a new item code

Use Case Examples: A new item is reclassified to a used item or demo item and may have a new item code. A product undergoes a curing process and becomes a new item -E.g Timber that is untreated and then becomes treated.
In accounting terms this is simply a double adjustment.

PHYSICAL

The Item is reclassified and needs a new label

GRANITE OPERATOR



The tracking barcode labels are printed by Granite. They include:

- a unique tracking barcode
- the item code and description
- the item quantity

Post adjustment journal

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

SCRAP

GRANITE PROCESS TYPE = MOVE

May 26, 2021

BUSINESS

Items are lost, damaged or stolen or just incorrectly labelled

PHYSICAL

Operator moves stock physically → Operator performs the Move process on a scanner

GRANITE OPERATOR

Menu: Scrap → Enter a **Comment** providing a reason for scrapping → Enter or Scan **Non Conformance Location** → Scan or Enter **Tracking Barcode**

Post adjustment journal

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

QC CONTROL

GRANITE PROCESS TYPE = QC CONTROL

May 26, 2021

BUSINESS

Stock requires to be put on/released from QC Hold → Stock is placed on QC Hold for a QC operator to check → Stock is Released from QC Hold

PHYSICAL

QC removes stock for checking → QC returns stock from checking

GRANITE OPERATOR

Menu: QC Control

- Hold → Provide a **Comment** → Scan or Enter **Barcode**
- Release → Provide a **Comment** → Scan or Enter **Barcode**

No integration

1. **Reviewed with customer**
2. **Configured in Granite**
3. **Customer review / test**
4. **Customer approval / acceptance**
5. **Super user training complete**
6. **Process in production**

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

LOOKUP

GRANITE PROCESS TYPE = LOOKUP

May 26, 2021

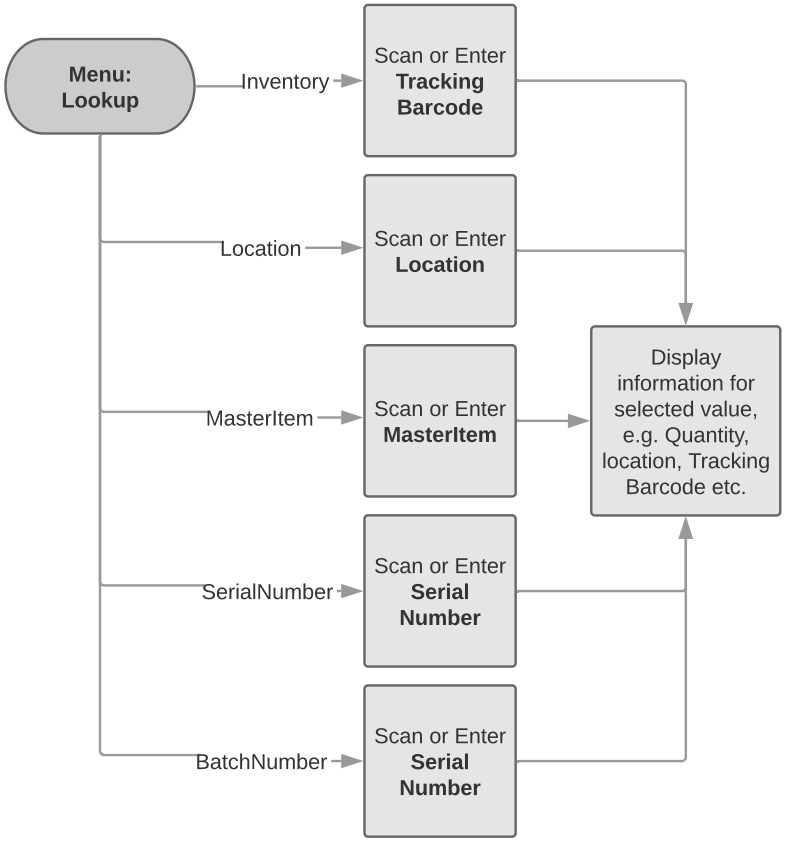
BUSINESS

Locate Items on the Scanner in the Warehouse → Stock can be found using Location, Master Item, Tracking Barcode,Serial or Batch Number

PHYSICAL

Operator looks for stock in the warehouse

GRANITE OPERATOR



No integration

1. Reviewed with customer
2. Configured in Granite
3. Customer review / test
4. Customer approval / acceptance
5. Super user training complete
6. Process in production

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM

LABEL PRINT

GRANITE PROCESS TYPE = LOOKUP

May 26, 2021

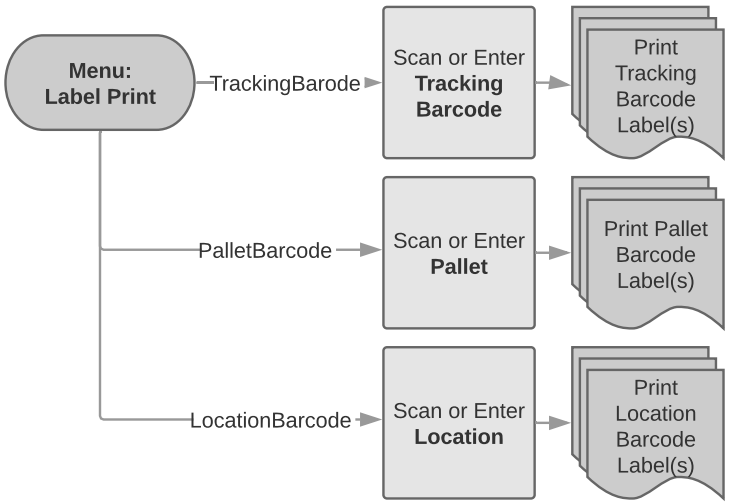
BUSINESS

Reprint Labels for any stock items or locations → Labels might need to be reprinted in the case of damage or incorrect information displayed on the Granite Label

PHYSICAL

Scanner Operator reprints a label using the Granite scanner or desktop

GRANITE OPERATOR



The tracking barcode labels are printed by Granite. They include:
- a unique tracking barcode
- the item code and description
- the item quantity

The pallet labels can be preprinted or printed by Granite. They include:
- a unique pallet barcode

The location labels are printed by Granite. They include:
- a unique location barcode
- a location description

No integration

1. **Reviewed with customer**
2. **Configured in Granite**
3. **Customer review / test**
4. **Customer approval / acceptance**
5. **Super user training complete**
6. **Process in production**

Granite Process Template (Simple with Serial/Batch/Expiry)

GRANITE WAREHOUSE MANAGEMENT SYSTEM