

ASi UPDATE

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PEAK REPORTS

In the August *ASi Update*, we discussed the advantages of using charts for items that are rotated on a daily/weekly basis. This month, we will discuss the "Peak Reports" that are a result of rotational activities on either a standard work order or a chart.

In some records centers, the "Peak Report" is used to determine the amount a customer will be billed for retention charges for rotational materials. The peaks represent the maximum number of rotational items stored during the PRIOR month.

The only way rotational items can be billed accurately is through the peaks generated by monthly work orders and charts. The system maintains an accurate count of all rotational codes in and out of the warehouse. The rotational/refile code totals used on the work orders/charts will appear in the "Peak Report"; thus, enabling you to keep an accurate count of all rotational items in your warehouse.

After you have validated that all peaks are correct, the peak totals must be entered under Modify Retention (**I-M**) for invoicing purposes.

In order to maintain the highest rate of verification, we suggest that you take periodic physical inventories of all rotational accounts—preferably on a monthly or bimonthly basis.

Drivers should return the charts to administrative personnel immediately after the last rotation indicated. Administrative personnel will then generally finish the charts on a weekly basis. The finishing process for a chart is a 2-step process: 1)the totals for rotations/refiles are entered and then transferred to a work order and 2)the work order is finished. These steps were discussed in detail in the *August 1996 Newsletter*.

If you have a multitude of charts prepared on a monthly basis, I strongly encourage you to run a "Peak Report" weekly—immediately after you have finished each week's charts. (I find that if there are any questions about illegible numbers or any other discrepancies, people are much more apt to remember something from last week rather than from a month ago.) It should be noted that if you do not finish your charts/work orders, those activities will not be reflected on the new "Peak Report". It is not necessary to print this report, just bring it up on your screen and scroll down through the report in order to determine whether or not there are any problems. Some areas of interest to keep in mind are the overall totals, the starting and ending balances, and a minus appearing in the balance column. The following outlines the necessary steps required to correct the ending balance, change peak totals, and change media type.

Service codes for rotational items must have a media type attached. This media type will appear on the "Peak Report". You must also make sure the proper function code is attached to the service codes for rotations/refiles; otherwise, they will not appear on the "Peak Report".

All of the following activities will be found in the "**Peak Reports**" (**I-R-P**) section of the Corporate Keeper®. Just use your arrow keys to move around in order to select your desired selection.

SAMPLE CORRECTION NO. 1

One of the problems you might encounter on your "Peak Report" could be a "minus" total in the balance column. Please keep in mind that the driver could not deliver an item that does not exist. Therefore, this minus would indicate that rotational items were brought into the warehouse on some prior date, but were not noted on a chart or work