

Central Stores User's Manual for AiM CMMS

NON-STOCK PARTS ORDERING PROCESS

Version 1.1 as of 18-September-2012



System Access

If you need to order non-stock merchandise through Central Stores, you will need access to the AiM CMMS System. For access to the AiM system, please contact the AiM Database Administrator, who is currently Joe Algee, at (407) 823-6278 or via email at joe.algee@ucf.edu. When making your request, please ask for the Role "Stores Customer" which will automatically provide you with the proper access levels in the system.

NOTE: If your shop eventually uses AiM as a work order management system, you will inherit the additional roles/access levels required for that purpose. The "Stores Customer" role is intended for shops that are not currently using the AiM system for work order management.

Overview of Material Requisitions Within AiM

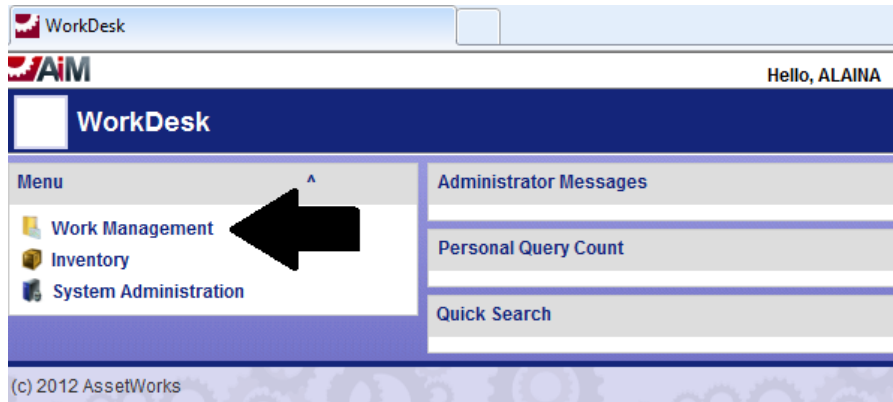
The AiM Suite by AssetWorks is Facilities & Safety's new Computerized Maintenance Management System (CMMS). It also acts as the inventory and purchasing management system for Central Stores. All items ordered through Central Stores, whether stock or non-stock, are requested, tracked, and billed through this system.

All billing activities within AiM are directly linked to work orders. With regard to merchandise and supplies, there are two different types of work orders from which **Material Requests** may be launched. If your shop is currently using the AiM system to manage your work orders, you can launch a **Material Request** directly from the work order that requires the material. If your shop is not currently using the AiM system, or if you are ordering Shop Supplies (tape, bundles of wire, or other items purchased in bulk and used occasionally within the shop or on jobs in small quantities), you can launch a **Material Request** from your Standing Work Order which is assigned to your shop annually by Central Stores. A listing of the Shop Supply Work Orders for the current fiscal year may be viewed online at http://www.fo.ucf.edu/warehouse/stores/2012-2013_BWO.pdf

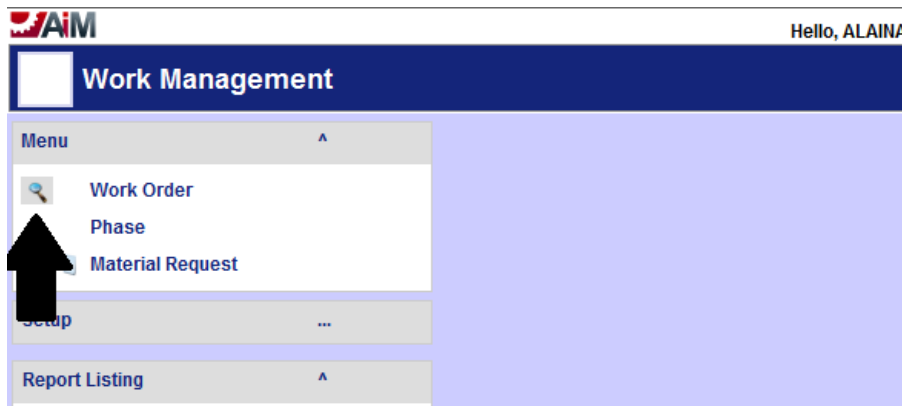
Starting a New Material Request

It does not matter in the AiM system which type of work order a **Material Request** is launched from as they all launch in the same manner. You can launch a request for non-stock materials from a Shop Supplies work order or from a work order for single-instance campus maintenance or work that's been assigned to you or your shop.

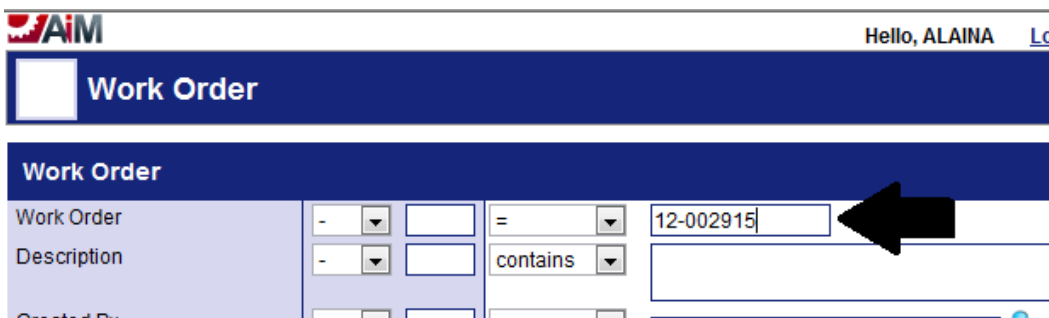
To start a new **Material Request** for a non-stock item, from the Home Page of AiM, select Work Management from the menu options to the left:



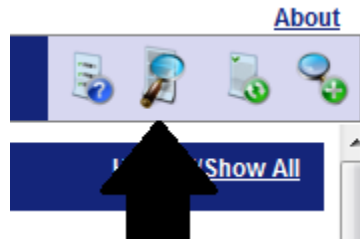
Select the "Search" option from the left menu (it looks like a magnifying glass and, depending on your web browser, may not display unless you "hover" over it with the mouse pointer):




In the "Work Order" text box, enter either the work order that you are currently working on or enter your shop's Annual Blanket Shop Supplies work order number:



Click the "Search" icon in the upper right-hand corner of the screen to load your intended work order to your desktop:



When your work order has been loaded to the desktop view, click the work order number on the left to enter the work order detail screen:

 Hello, ALAINA [Logout](#)

Work Order

Work Order ↑	Description	Status	Type	Category
12-002915	ANNUAL BLANKET WORK ORDER FOR SUPPLIES ORDERED FROM CENTRAL STORES BY MEMBERS OF THE LANDSCAPE AND NATURAL RESOURCES TEAM	OPEN	STANDING	SHOP SUPPLIES

A black arrow points to the work order number [12-002915](#).

For this example, we are using an Annual Standing Shop Supply work order. Therefore, there will be twelve phases for this type of work order, one phase for each month of the fiscal year. For example, July will be Phase 001, August will be Phase 002, and so forth. For shop supply work orders, only the current month's phase will be active.

To order supplies against the correct Phase, you must first enter the Phase detail screen by clicking on the Phase number link on the left-hand side of the screen:

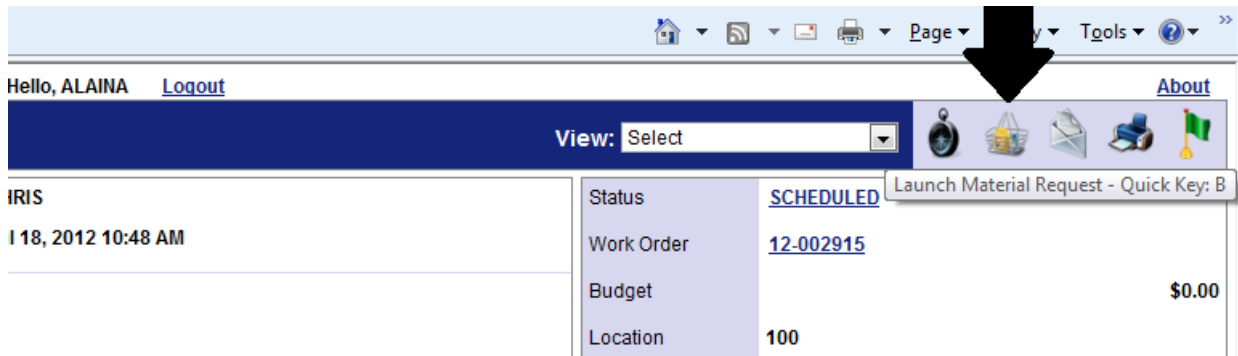
Contact Email **alaina.bernard@ucf.edu** FACILITIES & SAFETY WAREHOUSE

Phase

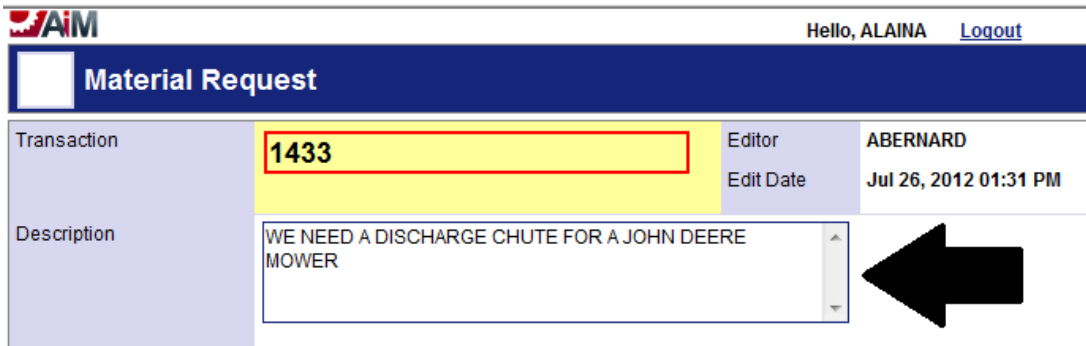
Phase	Description	Location	Sh
001	07-2012 SHOP SUPPLIES	100	FS

A black arrow points to the phase number [001](#).

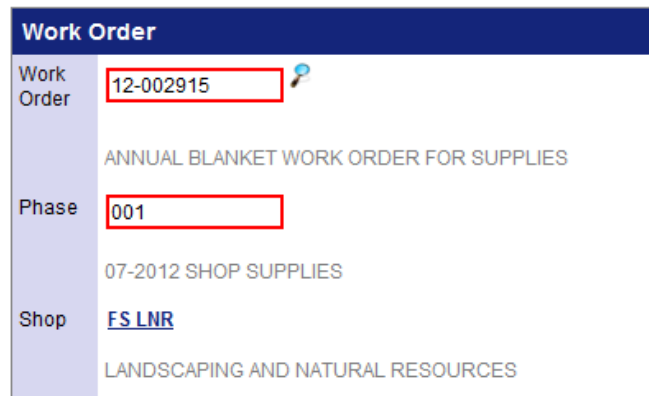
After you've entered the Phase detail screen, look for the "Shopping Basket" icon in the upper right-hand corner of the screen. Notice that if you "hover" the mouse key over the different icons, a tip pops up that tells you what the icon does if pressed. Press the basket icon to launch a new **Material Request**.



When the new **Material Request** screen loads, the first thing to do is to enter a meaningful description of the request. There is no preferred format to this other than "the more information that's included the better".



Verify that the work order information is correct in the Work Order box:




Enter the "Requested By" name, the "Date Needed", and the "Deliver To" under the "Requestor" box:

Requestor	
Requested By	<input type="text" value="HHUMPHREY"/> HASSEL HUMPHREY
Date Needed	<input type="text" value="Aug 01, 2012"/>
Deliver To	<input type="text" value="GTAYLOR"/> GEORGE TAYLOR

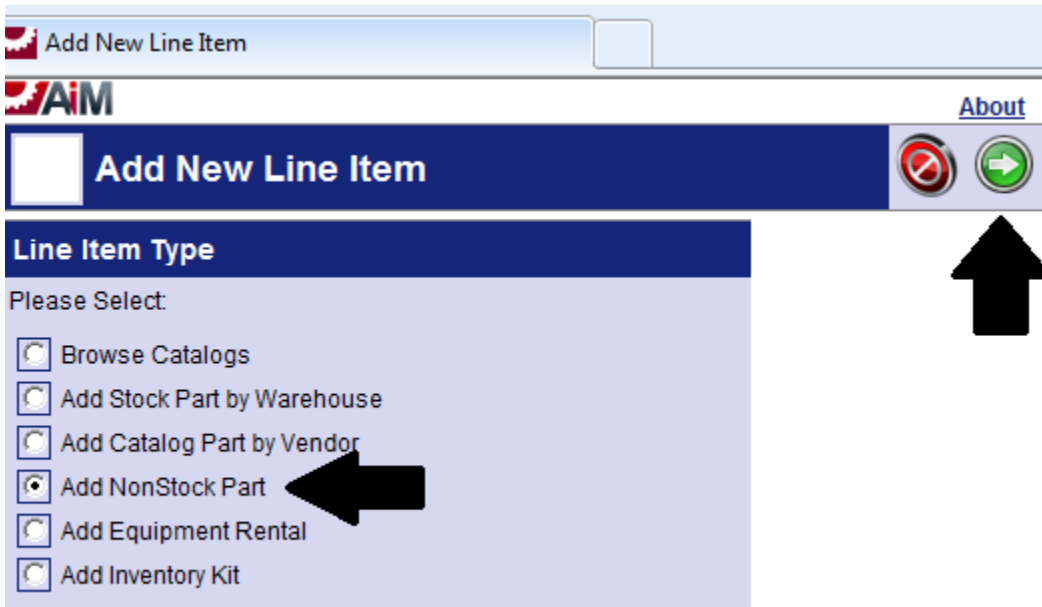
Leave the default location information in exactly as it was loaded from the work order:

Location	
Region	<input type="text" value="UCF"/> UNIVERSITY OF CENTRAL FLORIDA
Facility	<input type="text" value="MAIN CAMPUS"/> 4000 CENTRAL FLORIDA BLVD.
Property	<input type="text" value="0016E"/> FACILITIES & SAFETY WAREHOUSE
Location	<input type="text" value="100"/> MAIN FLOOR F&S WAREHOUSE

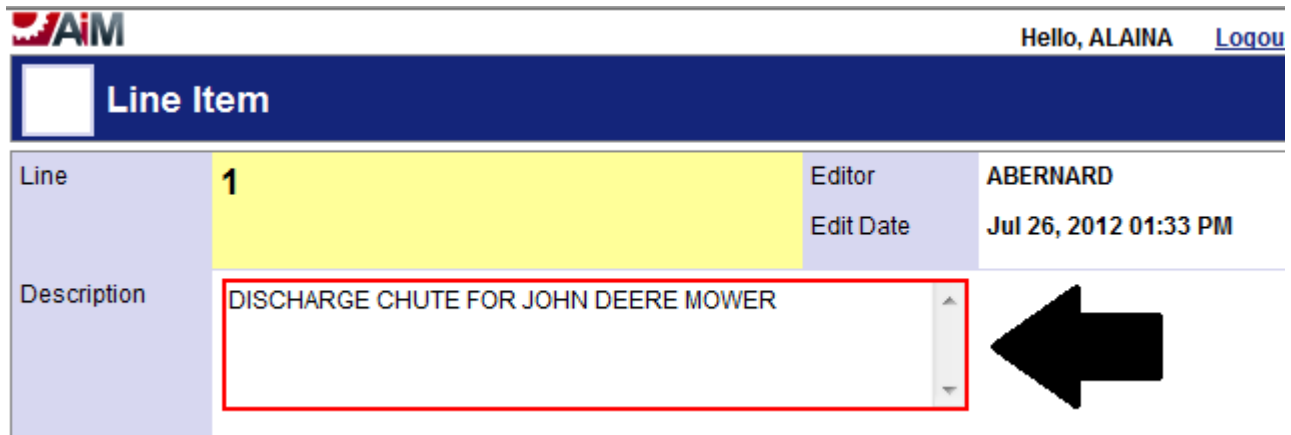
Start adding line items to your **Material Request** by clicking on the small green "plus sign" in the lower right-hand side of the screen:

Property	<input type="text" value="0016E"/> FACILITIES & SAFETY WAREHOUSE			
Location	<input type="text" value="100"/> MAIN FLOOR F&S WAREHOUSE			
<input style="background-color: #003366; color: #90EE90; border: none; padding: 2px 5px;" type="button" value="+"/> <input style="background-color: #003366; color: #FF0000; border: none; padding: 2px 5px;" type="button" value="-"/>				
UOM	Quantity	Unit Cost	Subtotal	Status

On the "Add New Line Item" screen, select "Add Non-Stock Part" then click the green "forward" arrow in the upper right-hand corner of the screen:



On the Line Item screen, enter the part description in the Line Item "Description" box:



Enter the vendor "Short Code" in the "Contractor" box:

Contractor	
Contractor	<input type="text" value="SUNBELT"/> 
	SUNBELT LAWN & GARDEN
Address Code	<input type="text" value="010"/>
	6566 UNIVERSITY BLVD.
	WINTER PARK
	32792

This list can be searched alphabetically, or for quick reference see the following link:

http://www.fo.ucf.edu/warehouse/stores/CS_Vendor_Codes.pdf

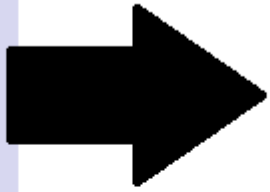
Enter the vendor part number in the "Part" text box and select the Unit of Measure from the UOM Box:

Part	
Part	<input type="text" value="AM128244"/>
UOM	<input type="text" value="EA"/> 
	THIS INVENTORY ITEM IS ONLY SOLD IN DISCRETE
Green	<input type="text" value="No"/> 
Class	
Commodity	<input type="text"/> 



Enter the quantity and the Unit Cost (if known) in the Totals section:




Totals	
Quantity	<input type="text" value="1"/>
Unit Cost	<input type="text" value="100.00"/>
Total	\$0.00





NOTE: If the actual cost is not known, enter an estimate and the Central Stores buyer will update the Material Request with the actual cost when it becomes available.

After you've completed entering the details for the first line item, you can either click the large green "plus sign" to add another item to the request or you can click the green flag to indicate that you've finished entering items for this request. Both icons are located in the upper right-hand corner of the screen:

View:

[About](#)

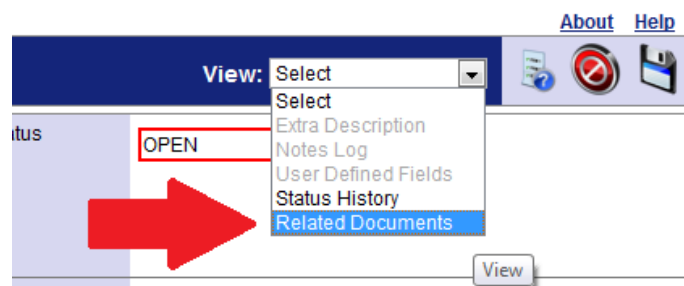
Status	<input type="text" value="Open"/>	 
Line Type		

NOTE: If you are entering additional line items on the request, simply repeat the steps above until all items have been entered. Then, click the green flag icon to indicate you have finished adding items.

Adding Related Documents and/or Images to a Material Request

Let's suppose that you have a digital image of the part you are ordering or perhaps you have a quote that you would like to attach to your Material Request. You can do this by making use of the "Related Documents" feature.

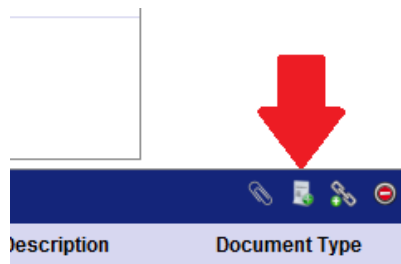
First, you will need to access the "Related Documents" screen by clicking on the View>Select drop down box in the upper right-hand corner of the screen and then by selecting "Related Documents" from the menu:



This will take you to the upload screen where you can add your files.



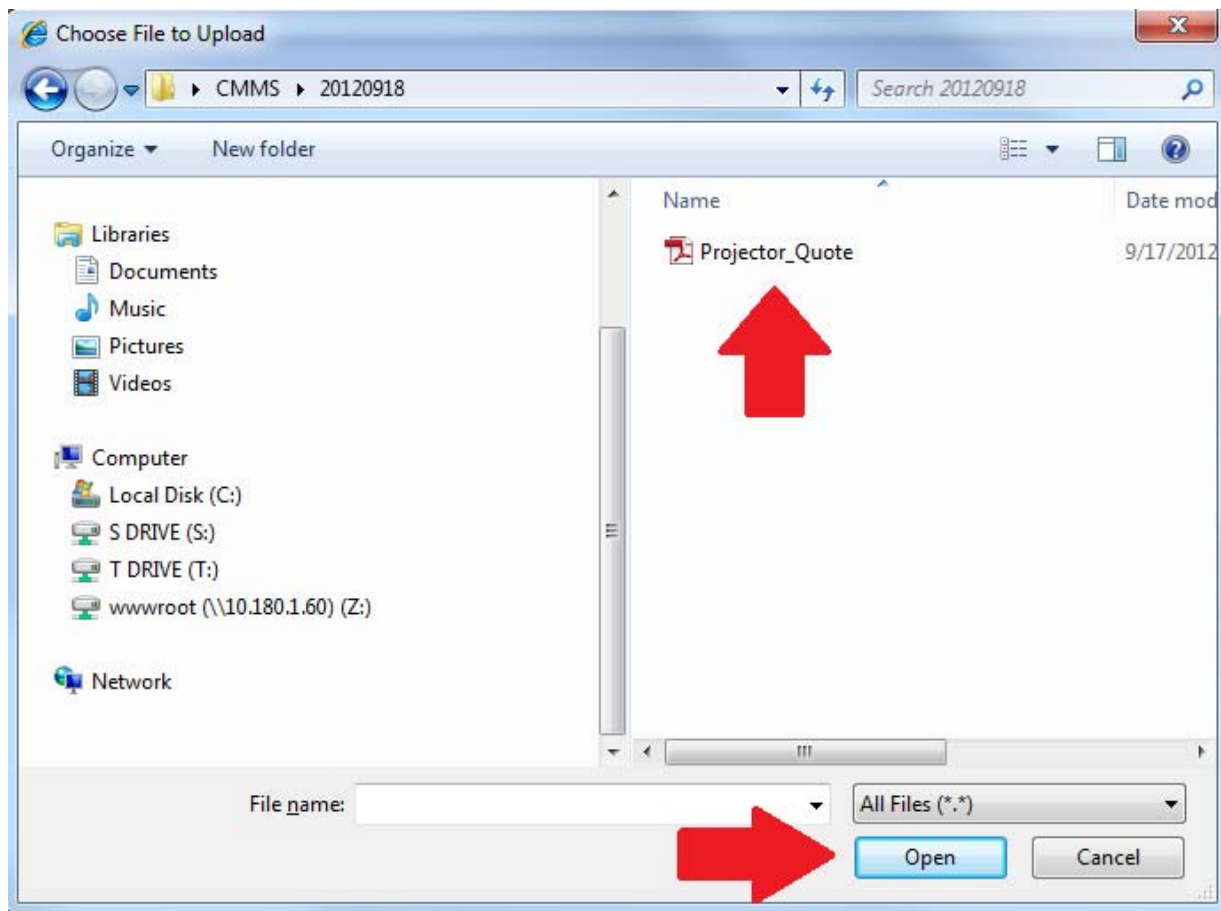
To add a new file to the system, click the "Add New Document" icon on the tool bar in the middle of the right side of the screen. In this example, we are going to add a quote from the vendor to the Material Request.



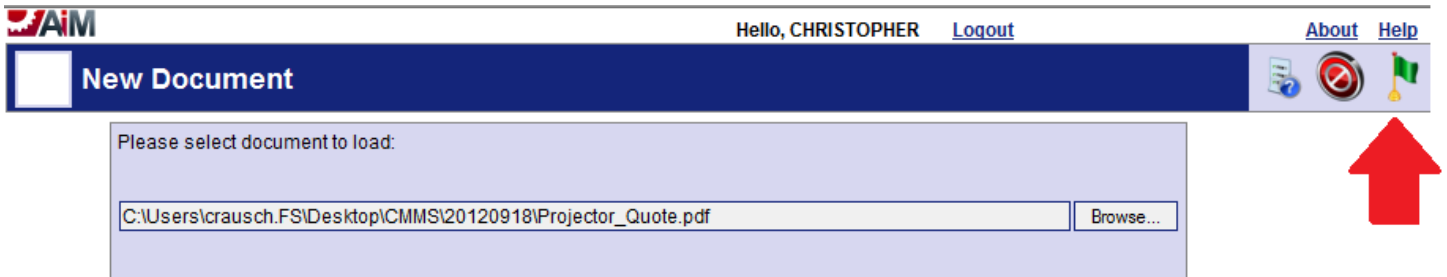
This will bring you to the second upload screen where you can browse for the document on your computer or on the network:



Use the browse button to locate your document, highlight it by clicking on the name of the file **once**, then click on the "Open" button on the lower right-hand corner of the popup dialogue box:



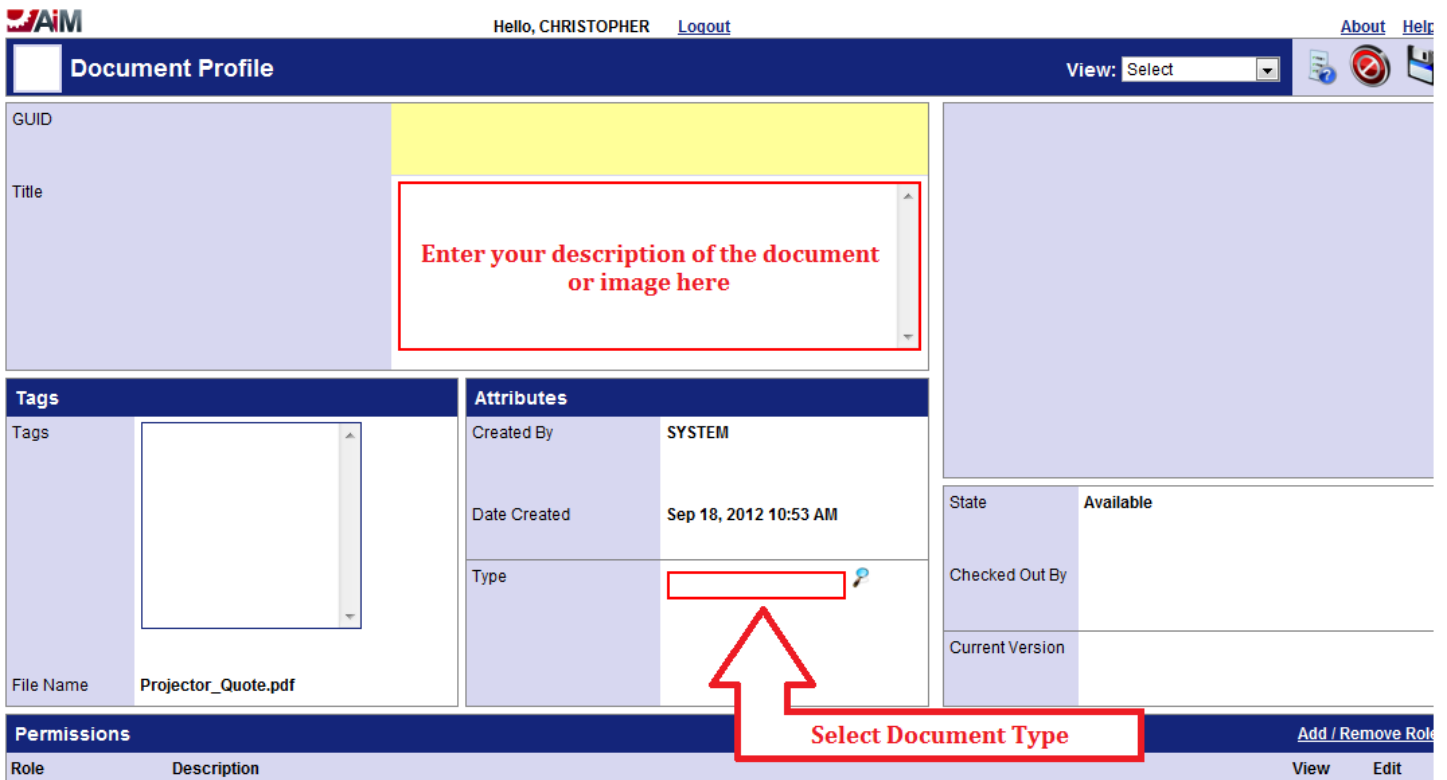
When the document location string has been updated to the New Document screen, click the green flag in the upper right-hand corner:



Please select document to load:

C:\Users\crausch.FS\Desktop\CMMS\20120918\Projector_Quote.pdf

You will need to enter a description for your document and select the document type:



Document Profile View: Select

GUID

Title

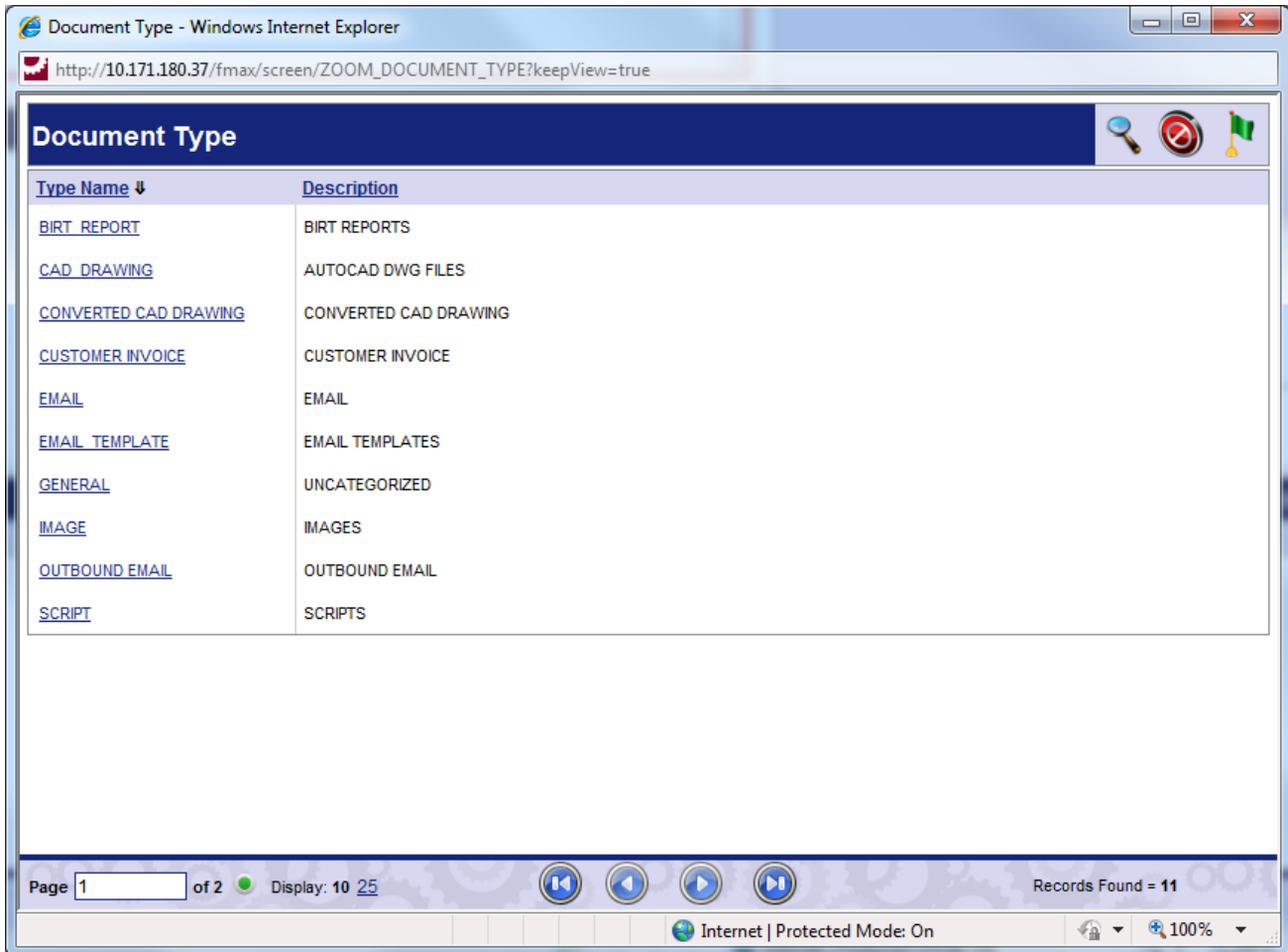
**Enter your description of the document
or image here**

Tags		Attributes	
Tags	<input type="text"/>	Created By	SYSTEM
		Date Created	Sep 18, 2012 10:53 AM
		Type	<input style="border: 1px solid red;" type="text"/> <input type="button" value="🔍"/>
File Name	Projector_Quote.pdf	State	Available
		Checked Out By	
		Current Version	

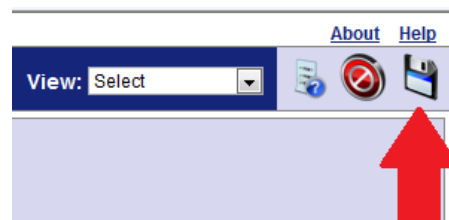
Select Document Type

Permissions		Add / Remove Role	
Role	Description	View	Edit

If you are unfamiliar with the various document types that the AiM system will support, you can click on the small magnifying glass to the right of the Type text box and a helper window will open.



Select the document type by clicking on the name (blue hyperlinks on the left). When the system returns you to the Document Profile page, click the “Save” icon in the upper right-hand corner to save your document to the material request:



After you've saved your document, click the green arrow in the upper right-hand corner of the screen to return to the Related Documents page. From there, you can either add another document or image to the Material Request by following the steps above, or click the green arrow in the upper right-hand corner of that screen to return to the main screen of your Material Request.

After you have completed adding items to the order and all related documents have been loaded (if applicable), you have a choice whether you want to leave the **Material Request** in "Open" status or change it to "Ready for Purchasing" status. If you would like to come back to this request to make changes or possibly to add items at a future point, leave it in "Open" status and Central Stores will take no action on it. If you are ready to send the order to the warehouse, change the status to "Ready for Purchasing" by clicking the magnifying glass icon to the right of the "Status" text box in the upper right-hand corner of the screen and then selecting it from the pop-up list that appears:

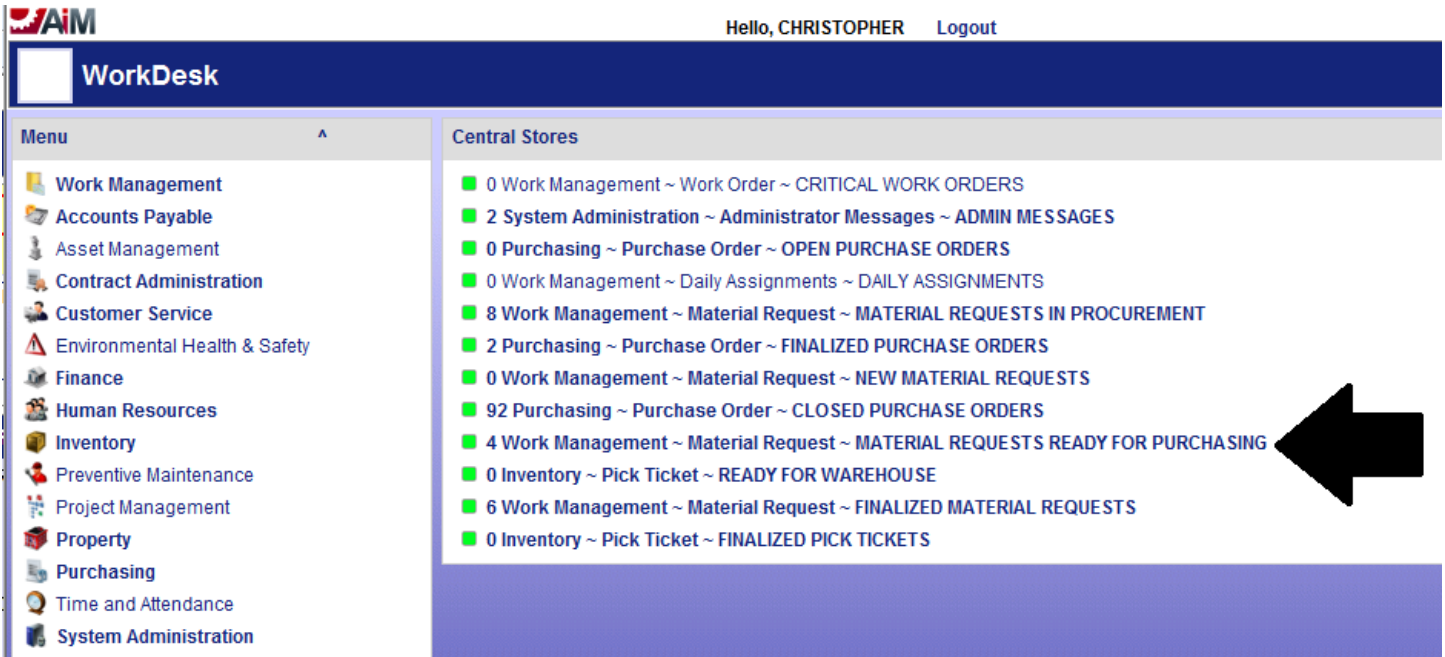


Material Request Status	
Status	Description
OPEN	OPEN MATERIAL REQUEST
READY FOR PURCHASING	MATERIAL REQUEST IS READY FOR BUYERS ACTION
CANCELED	MATERIAL REQUEST HAS BEEN CANCELED

A large black arrow points from the "READY FOR PURCHASING" status option towards the left side of the table.

This action will alert the Central Stores staff that a new purchase request has been submitted and someone needs to tend to the request and subsequent vendor order.

All of the Central Stores buyers and supervisors have automatic queries built into their main work desks in the AiM system. When you change the status of your **Material Request** from “Open” to “Ready For Purchasing”, these queries automatically refresh and alert the entire staff that a new order is pending. There is no need for individual buyer assignment in this system as the entire staff sees every available order.

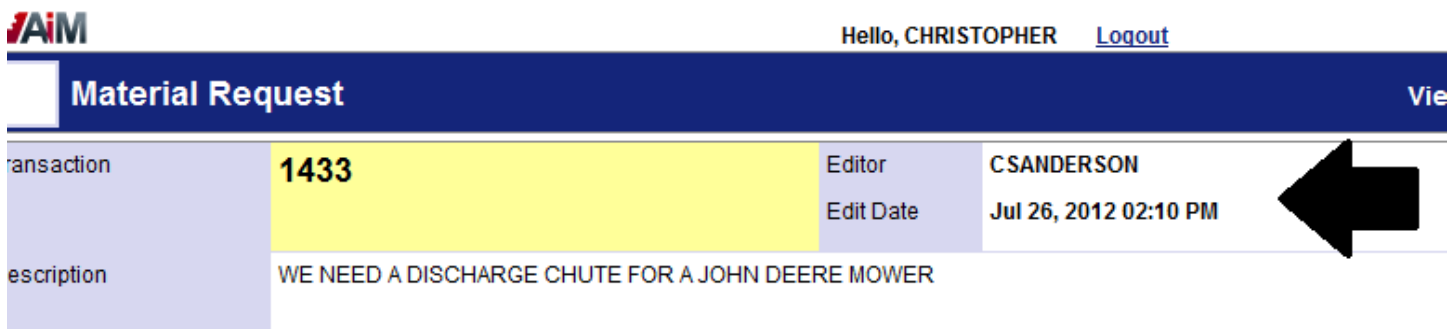


AiM Hello, CHRISTOPHER [Logout](#)

WorkDesk

Menu	Central Stores
Work Management	0 Work Management ~ Work Order ~ CRITICAL WORK ORDERS
Accounts Payable	2 System Administration ~ Administrator Messages ~ ADMIN MESSAGES
Asset Management	0 Purchasing ~ Purchase Order ~ OPEN PURCHASE ORDERS
Contract Administration	0 Work Management ~ Daily Assignments ~ DAILY ASSIGNMENTS
Customer Service	8 Work Management ~ Material Request ~ MATERIAL REQUESTS IN PROCUREMENT
Environmental Health & Safety	2 Purchasing ~ Purchase Order ~ FINALIZED PURCHASE ORDERS
Finance	0 Work Management ~ Material Request ~ NEW MATERIAL REQUESTS
Human Resources	92 Purchasing ~ Purchase Order ~ CLOSED PURCHASE ORDERS
Inventory	4 Work Management ~ Material Request ~ MATERIAL REQUESTS READY FOR PURCHASING
Preventive Maintenance	0 Inventory ~ Pick Ticket ~ READY FOR WAREHOUSE
Project Management	6 Work Management ~ Material Request ~ FINALIZED MATERIAL REQUESTS
Property	0 Inventory ~ Pick Ticket ~ FINALIZED PICK TICKETS
Purchasing	
Time and Attendance	
System Administration	

When a buyer has taken responsibility for your order, that buyer will change the status of your **Material Request** from “Ready for Purchasing” to “In Procurement”. If you would like to know which buyer is handling your order after the status has been changed to “In Procurement”, simply open the **Material Request** and look at the “Editor” box on the main screen. The buyer’s user ID will be displayed.



AiM Hello, CHRISTOPHER [Logout](#)

Material Request View

Transaction	1433	Editor	CSANDERSON
		Edit Date	Jul 26, 2012 02:10 PM
Description	WE NEED A DISCHARGE CHUTE FOR A JOHN DEERE MOWER		

After the cost information has been determined and the order has been confirmed with the vendor, the buyer will change the status of your Material Request from "In Procurement" to "Finalized".

When your requested items arrive at the warehouse, the buyer will take the following action:

For material request orders placed on Standing Shop Supply Work Orders

1. Close the "Purchase Order" and bill the Annual Blanket Shop Supplies work order for the material.
2. Call and/or email you to let you know that your parts have arrived.
3. Arrange for pickup or delivery of your materials to the intended party or the desired location.
4. Provide a copy of the "Purchase Receive" receipt for your files.
5. Obtain a signature from the "Deliver To" party verifying delivery of the materials.

For material request orders placed on unit work orders

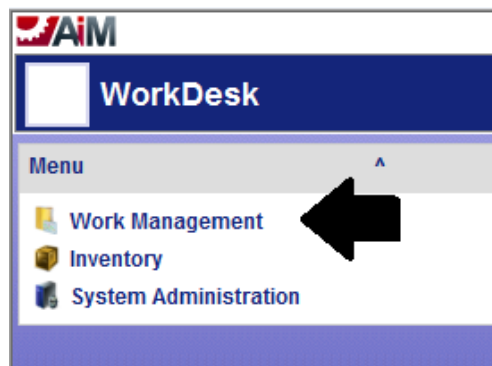
1. Close the "Purchase Order" in AiM and bill the work order for the material.
2. Change the status of your work order from "Awaiting Materials" to "Materials Ready".
3. Arrange for pickup or delivery of your materials to the intended party or the desired location.
4. Provide a copy of the "Purchase Receive" receipt for your files.
5. Obtain a signature from the "Deliver To" party verifying delivery of the materials.

Helpful Hints

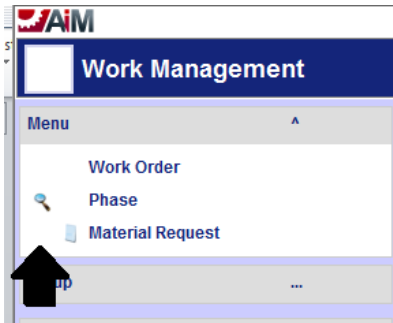
Adding a hyperlink on your Material Request for an external website reference:

If you would like to provide a hyperlink to an external website to perhaps provide the buyer with an image of the item you are seeking, you can do this by adding it as a note to the Material Request's "Notes Log".

Start at the main screen and click on the "Work Management" link on the left side of the screen:

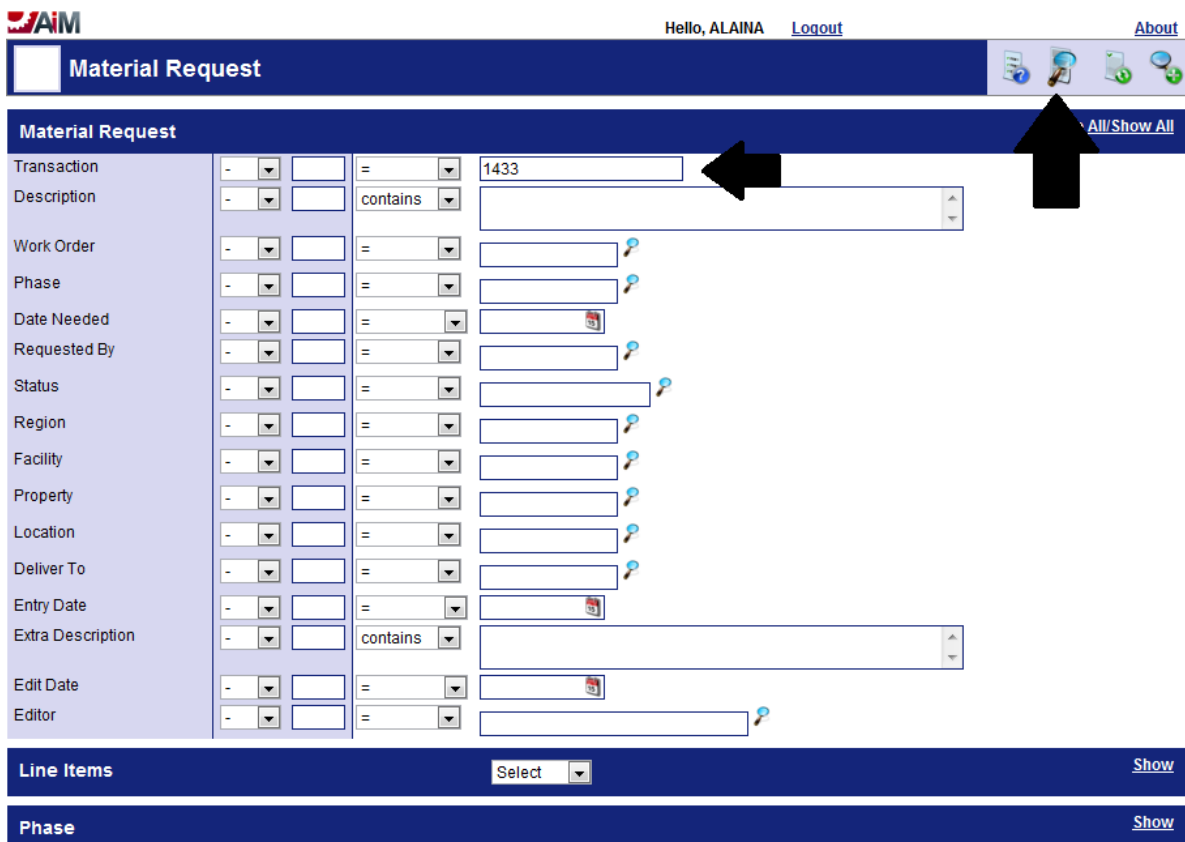


From the Work Management screen, click the magnifying glass icon to the left of the Material Request link on the left side of the screen:



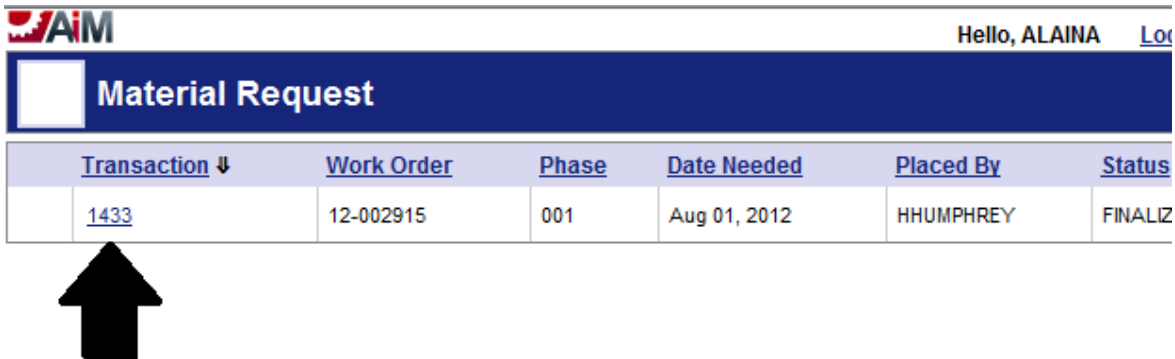
NOTE: Depending on the web browser that you are using, the icon may not appear until you “hover” over it with the mouse.

Enter your Material Request transaction number in the “Transaction” text box, then click the “Search” icon in the upper right-hand corner of the screen:



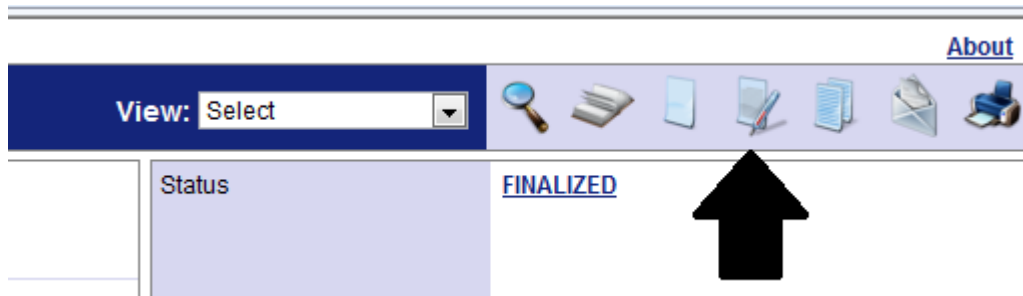
The screenshot shows the 'Material Request' search interface. At the top right, there is a 'Hello, ALAINA Logout' and an 'About' link. Below this is a search bar with a magnifying glass icon. A black arrow points to this icon. Below the search bar is a table with columns for 'Transaction', 'Description', 'Work Order', 'Phase', 'Date Needed', 'Requested By', 'Status', 'Region', 'Facility', 'Property', 'Location', 'Deliver To', 'Entry Date', 'Extra Description', 'Edit Date', and 'Editor'. The 'Transaction' field contains the number '1433'. A black arrow points to this field. At the bottom of the screen, there are two buttons: 'Line Items' and 'Phase', both with 'Show' links.

When the material request record has been loaded to the selection view, click the transaction number to open it:

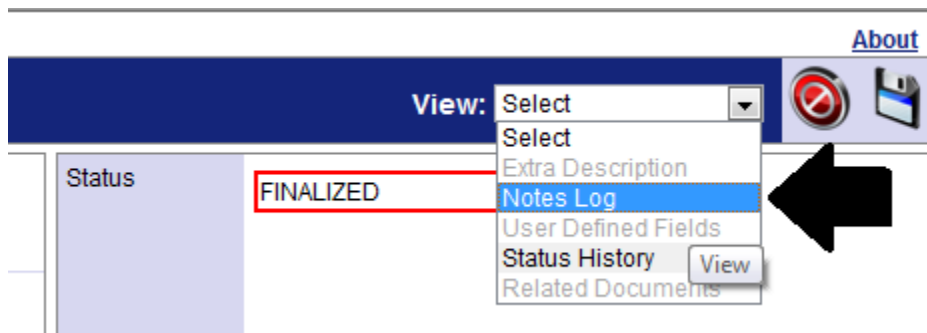


Transaction ↓	Work Order	Phase	Date Needed	Placed By	Status
1433	12-002915	001	Aug 01, 2012	HHUMPHREY	FINALIZ

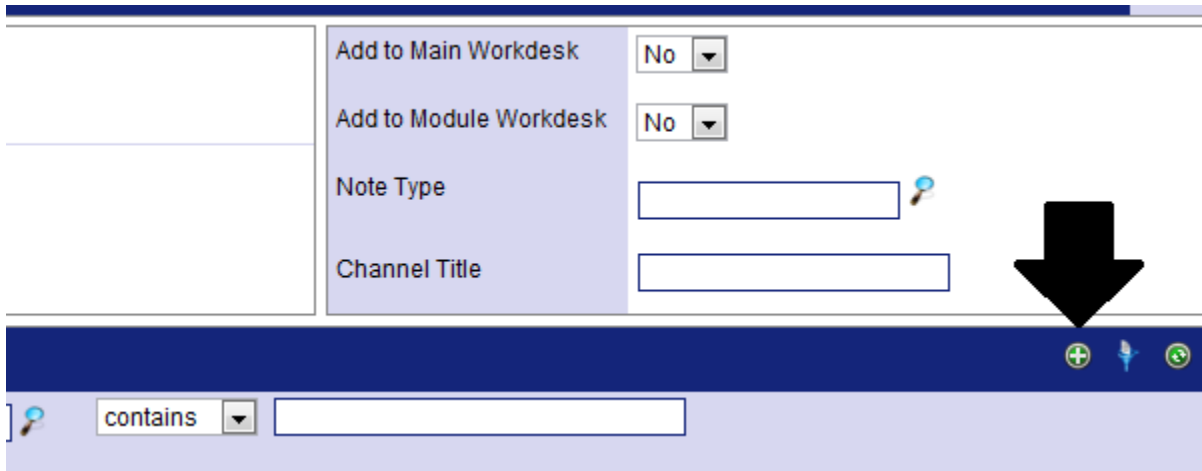
Click on the “Edit” icon in the upper right-hand corner of the screen:



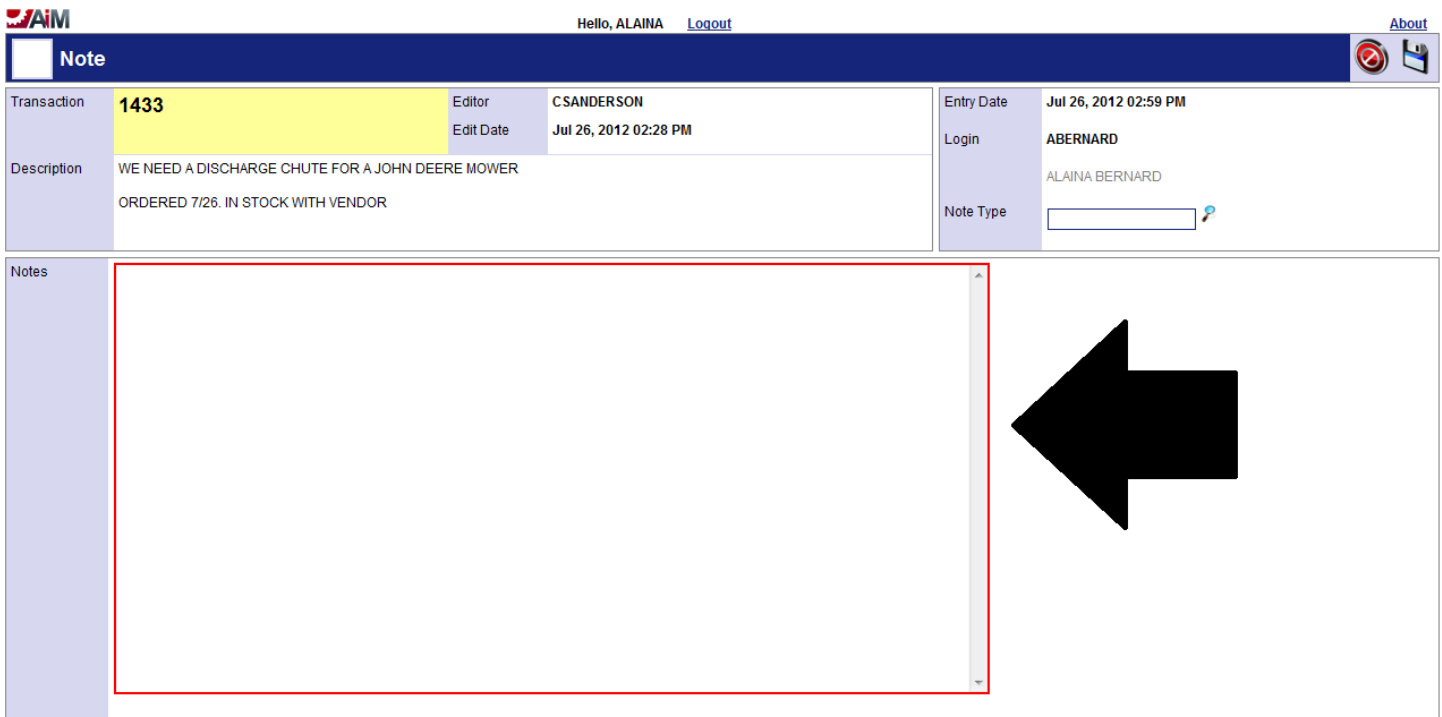
On the “View-Select” drop down menu in the upper right-hand corner, choose “Notes Log”:



On the “Notes Log” screen, select the small green “plus sign” located on the right hand side of the screen about half way down the page:

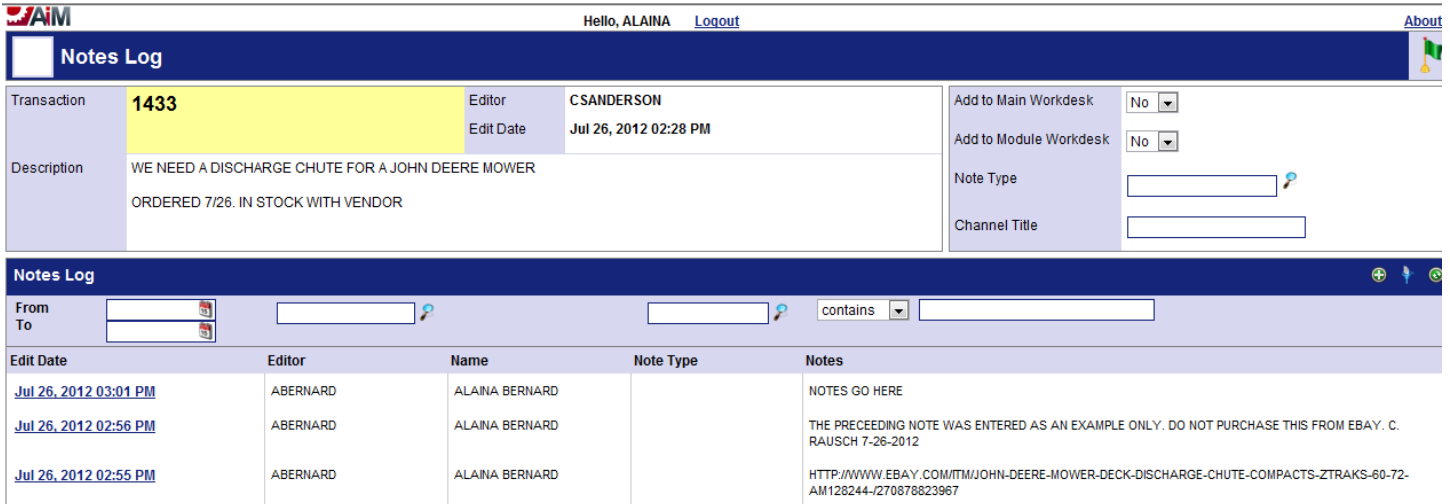


Enter your note, hyperlink, or other information in the “Notes” area:



Save the note by clicking on the save icon in the upper right-hand side of the screen (small diskette).

The save function will return you to the main “Notes” screen for that Material Request where all notes can be reviewed:



The screenshot shows the AiM interface. At the top, it says "Hello, ALAINA" and "Logout". The main section is titled "Notes Log". It displays details for a transaction with ID 1433, edited by CSANDERSON on Jul 26, 2012 at 02:28 PM. The description is "WE NEED A DISCHARGE CHUTE FOR A JOHN DEERE MOWER ORDERED 7/26. IN STOCK WITH VENDOR". There are options to "Add to Main Workdesk" and "Add to Module Workdesk", both set to "No". There are also input fields for "Note Type" and "Channel Title".

Below this is a search bar for the "Notes Log" with fields for "From", "To", and a search term, with a dropdown menu set to "contains".

Edit Date	Editor	Name	Note Type	Notes
Jul 26, 2012 03:01 PM	ABERNARD	ALAINA BERNARD		NOTES GO HERE
Jul 26, 2012 02:56 PM	ABERNARD	ALAINA BERNARD		THE PRECEEDING NOTE WAS ENTERED AS AN EXAMPLE ONLY. DO NOT PURCHASE THIS FROM EBAY. C. RAUSCH 7-26-2012
Jul 26, 2012 02:55 PM	ABERNARD	ALAINA BERNARD		HTTP://WWW.EBAY.COM/ITM/JOHN-DEERE-MOWER-DECK-DISCHARGE-CHUTE-COMPACTS-ZTRAKS-60-72-AM128244-I270878823967

NOTE: Once you’ve entered a note, it is in the system forever. You cannot edit or delete a note from the system once it has been saved. Be careful with what you write!

Central Stores Contact Information

If you have additional questions, please contact one of the following team members and we will be happy to assist you:

Contact	Office Phone	Email
Cheryl Sanderson	(407) 823-2986	cheryl.sanderson@ucf.edu
Karen Longobardo	(407) 823-3681	karen.longobardo@ucf.edu
Brandon Baker	(407) 823-4449	brandon.baker@ucf.edu
Kathy Reese	(407) 823-1578	kathleen.reese@ucf.edu
Lance Watkins	(407) 823-4082	lance.watkins@ucf.edu
Chris Rausch	(407) 823-3099	christopher.rausch@ucf.edu