

Central Stores User's Manual for AiM CMMS

STOCK PARTS ORDERING PROCESS

Version 1.1 as of 18-September-2012



System Access

If you need to 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 Stock Issues from Central Stores within AiM

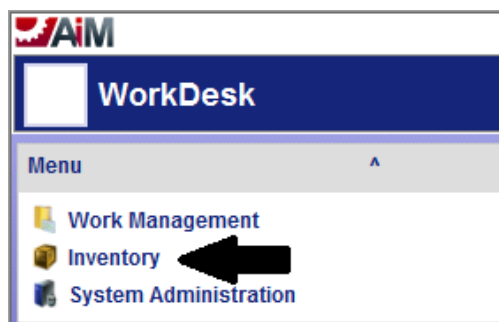
The AiM Suite by AssetWorks is Facilities & Safety’s new Computerized Maintenance Management System (CMMS). It also acts as the inventory and purchasing management system for Central Stores. All parts ordered through Central Stores, whether stock or non-stock, are requested, tracked, and billed through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

All billing activities within AiM are directly linked to work orders. If you are not currently using AiM to manage your department’s or shop’s work orders, an Annual Blanket Supply Issue work order has been issued for your use to order stock parts from 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

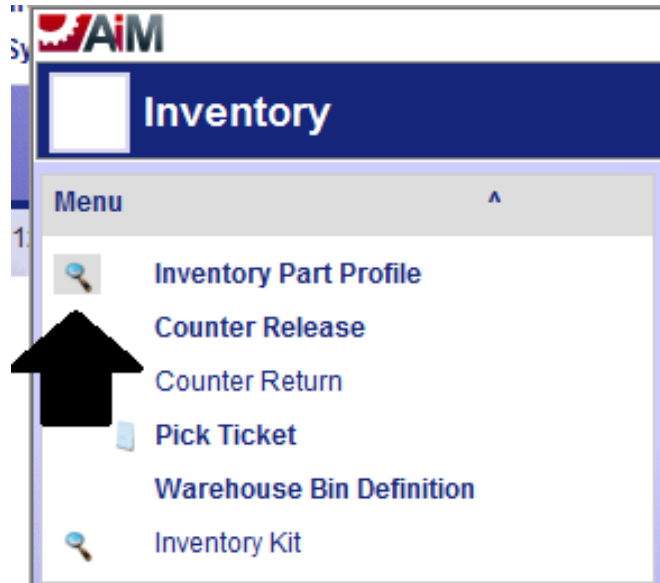
Stock parts are ordered from Central Stores through the Pick Ticket system.

Starting a New Pick Ticket

After you have logged into the AiM system, you can start an order for stock items from the warehouse by navigating to the “Inventory” module on the left-hand side of the screen:

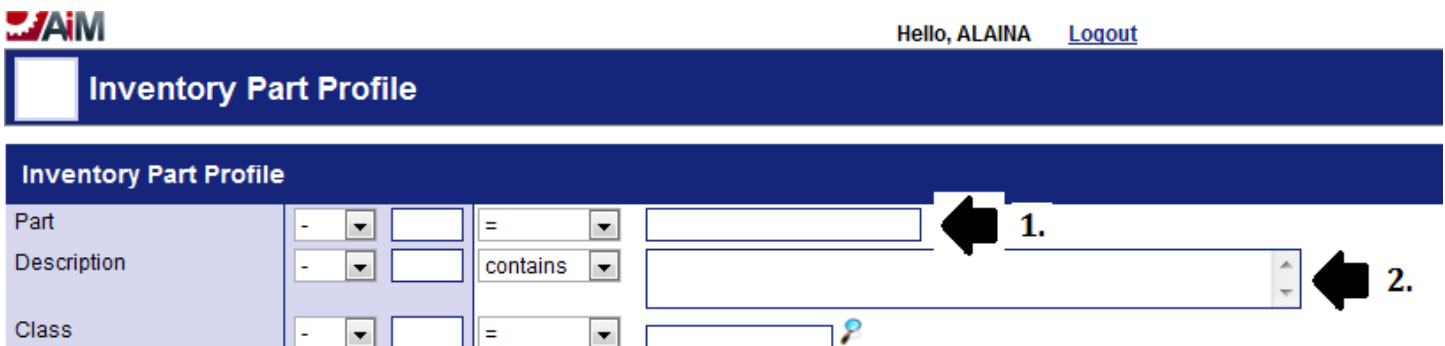


If you are interested in seeing what the warehouse currently has in stock and are not yet ready to place your order, you can browse the inventory by clicking on the search command to the left of the “Inventory Part Profile” link on the left-hand side of the screen. The search command is a small magnifying glass and may not display until you “hover” over it with the mouse.



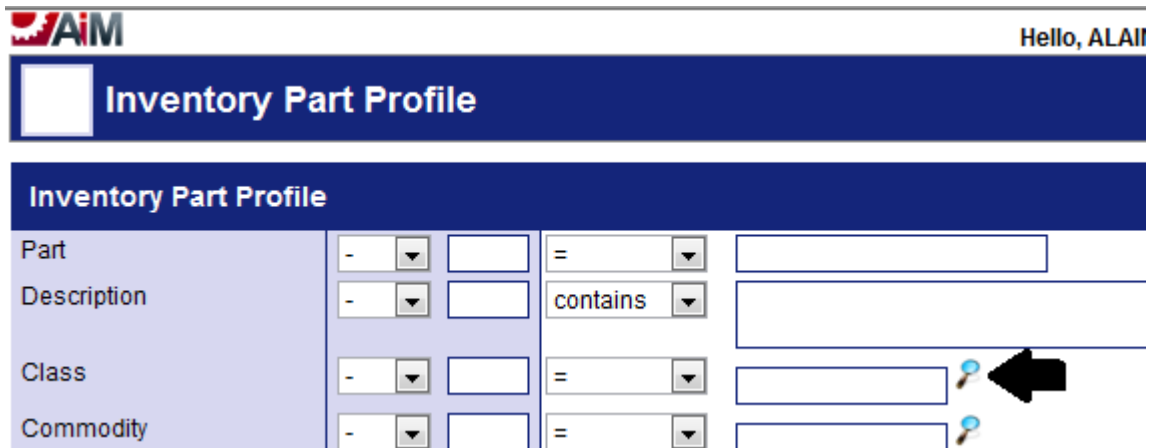
When the search criteria box pops up, you have several different ways you can search for inventory parts:

1. If you know the part number, enter it here.
2. If you know part of the item description, enter it here.

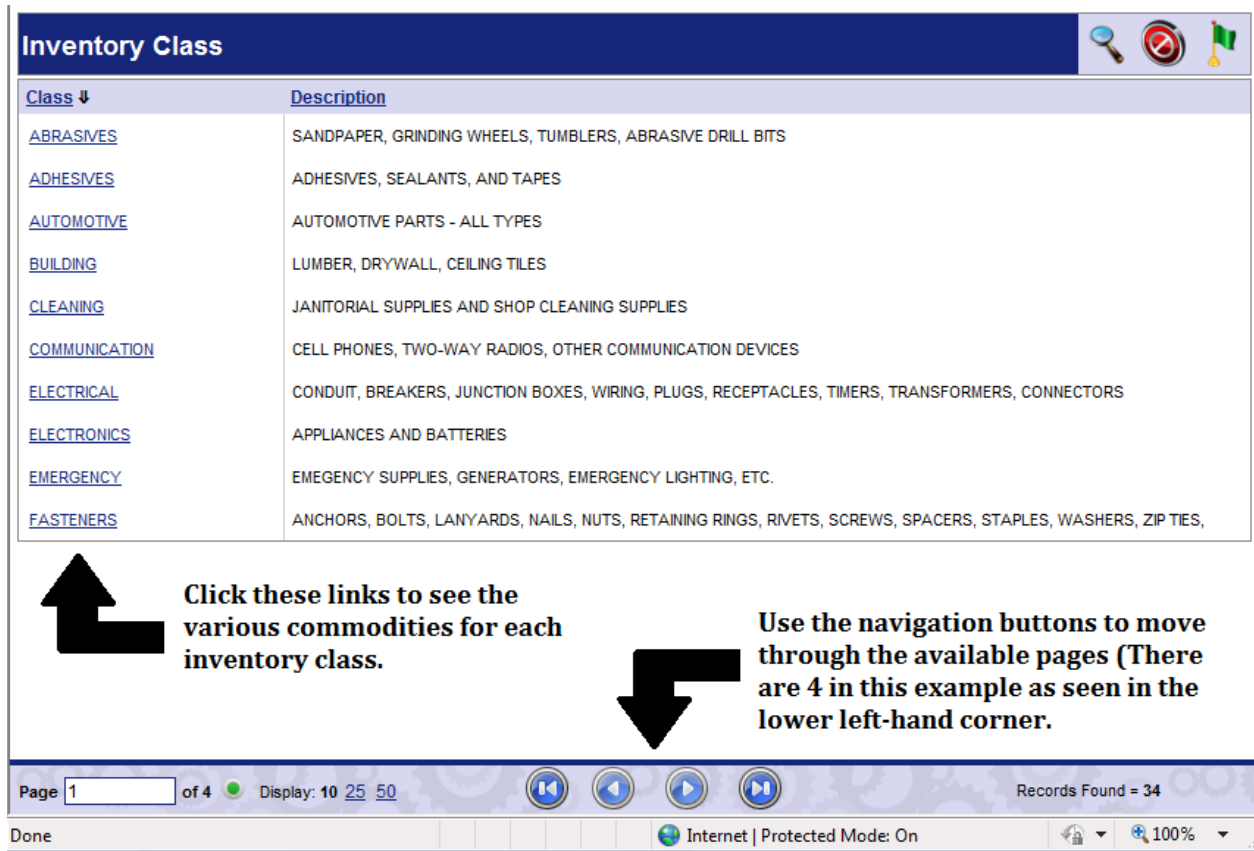


The screenshot shows the AiM logo at the top left, the user name "Hello, ALAINA", and a "Logout" link. Below is a blue header bar with "Inventory Part Profile". Underneath is another "Inventory Part Profile" section containing a search form. The form has three rows: "Part", "Description", and "Class". Each row has a dropdown menu, a text input field, a comparison operator dropdown ("=", "contains"), and another text input field. A magnifying glass icon is at the bottom right of the form. Two black arrows point to the search input fields: arrow "1." points to the "Part" input field, and arrow "2." points to the "Description" input field.

Alternatively, the AiM system also allows you to search by inventory class, commodity and/or item category. For example, if you want to search by inventory class, click the magnifying glass to the right of the "Class" textbox...



This will bring up the available inventory classes for items in the warehouse:



Class ↓	Description
ABRASIVES	SANDPAPER, GRINDING WHEELS, TUMBLERS, ABRASIVE DRILL BITS
ADHESIVES	ADHESIVES, SEALANTS, AND TAPES
AUTOMOTIVE	AUTOMOTIVE PARTS - ALL TYPES
BUILDING	LUMBER, DRYWALL, CEILING TILES
CLEANING	JANITORIAL SUPPLIES AND SHOP CLEANING SUPPLIES
COMMUNICATION	CELL PHONES, TWO-WAY RADIOS, OTHER COMMUNICATION DEVICES
ELECTRICAL	CONDUIT, BREAKERS, JUNCTION BOXES, WIRING, PLUGS, RECEPTACLES, TIMERS, TRANSFORMERS, CONNECTORS
ELECTRONICS	APPLIANCES AND BATTERIES
EMERGENCY	EMERGENCY SUPPLIES, GENERATORS, EMERGENCY LIGHTING, ETC.
FASTENERS	ANCHORS, BOLTS, LANYARDS, NAILS, NUTS, RETAINING RINGS, RIVETS, SCREWS, SPACERS, STAPLES, WASHERS, ZIP TIES,

Click these links to see the various commodities for each inventory class.

Use the navigation buttons to move through the available pages (There are 4 in this example as seen in the lower left-hand corner).

Page 1 of 4 Display: 10 25 50 Records Found = 34

Done Internet | Protected Mode: On 100%

Let's suppose that we want to browse the available "Adhesives" in the warehouse. We would click on the "Adhesives" link...

Inventory Class	
Class ↓	Description
ABRASIVES	SANDPAPER, GRINDING WHEELS, TUMBLERS, ABRASIVE D
ADHESIVES ←	ADHESIVES, SEALANTS, AND TAPES
AUTOMOTIVE	AUTOMOTIVE PARTS - ALL TYPES

After returning to the main search screen once again, we would then execute the search by clicking on the large magnifying glass in the upper right-hand corner of the screen...





The search that you just executed will return all matching products currently in the warehouse.

Inventory Part Profile									
Part ↓	Description	Active	UOM	Class	Commodity	Item	Green	Type	Cycle Code
0100001010	ADHESIVE SPRAY, ADHESIVE SPRAY FOR FORMICA (17.60OZ)	Yes	EA	ADHESIVES	SPRAYS	SPRAYS	No	Material	
0100001012	LIQUID NAILS 10-5 TUBE	Yes	EA	ADHESIVES	GLUES	GLUES	No	Material	
0100001014	CARPET ADHESIVE, 1 QUART OUTDOOR CARPET ADHESIVE	Yes	QT	ADHESIVES	GLUES	GLUES	No	Material	
0100001015	BONDING GLUE, CONCRETE BONDING GLUE QUICKRETE 1 GALLON SIZE	Yes	GAL	ADHESIVES	GLUES	GLUES	No	Material	
0100001016	ADHESIVE, ALL PURPOSE FLOORING ADHESIVE (QUART)	Yes	QT	ADHESIVES	GLUES	GLUES	No	Material	
0100001143	HYDRAULIC CEMENT, LEAK STOPPER BY SAKRETE, (20 LBS BUCKET)	Yes	EA	ADHESIVES	GLUES	GLUES	No	Material	
0100001238	EPOXY, CLEAR EPOXY (DEVCON)	Yes	EA	ADHESIVES	EPOXY	EPOXY	No	Material	
0100001239	WOOD GLUE, CARPENTER WOOD GLUE 8 OUNCE SIZE	Yes	EA	ADHESIVES	GLUES	GLUES	No	Material	

If you want to refine your search even further, you can also further limit the search to Commodity and Item in the same manner as you selected Class in the previous search.

If you want to review a particular item, simply click on the Part link on the left side of the screen...

	0100001238	EPOXY, CLEAR EPOXY (DEVCON)	Yes
		WOOD GLUE, CARPENTER WOOD GLUE 8 OUNCE SIZE	Yes

This will launch the Inventory Part Profile where you can see the current price, the available quantity, and a photo of the item...

AiM Hello, ALAINA [Logout](#) [About](#)

Inventory Part Profile View:


Part	0100001238	Editor	CHRIS
		Edit Date	Jul 27, 2012 12:39 PM
Description	EPOXY, CLEAR EPOXY (DEVCON)		

Classification		Attributes	
Class	ADHESIVES	Type	Material
	ADHESIVES, SEALANTS, AND TAPES	Cycle Code	
Commodity	EPOXY	Manufacturer	
	EPOXY - ALL TYPES	Model	
Item	EPOXY	MSDS Number	
	EPOXY - ALL TYPES	MSDS Required	No
Green	No		

Cost		Quantity	
Average Cost	\$6.7000	On Hand	3.0000
On Hand Value	\$20.10	Committed	0.0000
		On Order	8.0000
		Expected	11.0000

Analysis	
Last Issue	Jul 24, 2012 04:12 PM
Last Commitment	
Last Disbursed	Jul 20, 2012 11:04 AM
Last Adjustment	Jun 30, 2012 08:40 PM

INVENTORY-0100001238



Active: Yes
UOM: EA
THIS INVENTORY ITEM IS ONLY SOLD IN DISCRETE
UOM Fractional: No

The current price of the items can be seen in the lower left-hand corner of the screen under the "Cost" box:

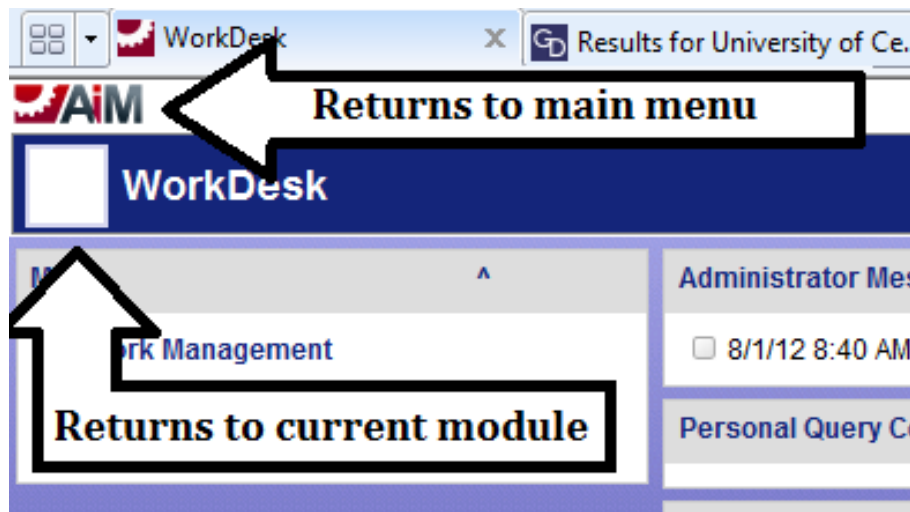
Cost	
Average Cost	\$6.7000
On Hand Value	\$20.10

The quantities available can be seen in the lower right-hand corner of the screen...

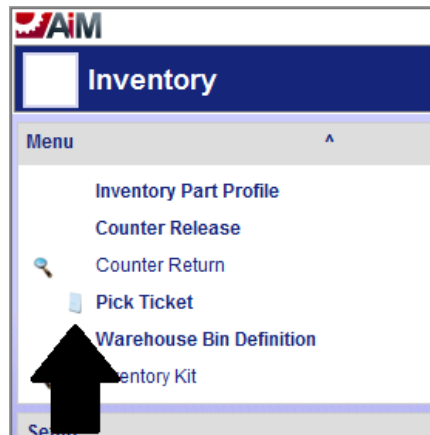
Quantity	
On Hand	3.0000
Committed	0.0000
On Order	8.0000
Expected	11.0000

The On-Hand quantity is the number currently on the shelf. The Committed quantity shows the number currently assigned to other orders, but not yet pulled from stock, the On-Order quantity shows the number of units of that item that are inbound from the supplier but have not yet arrived, and the Expected number is the combination of the current on-hand quantity less the committed plus the number on order.

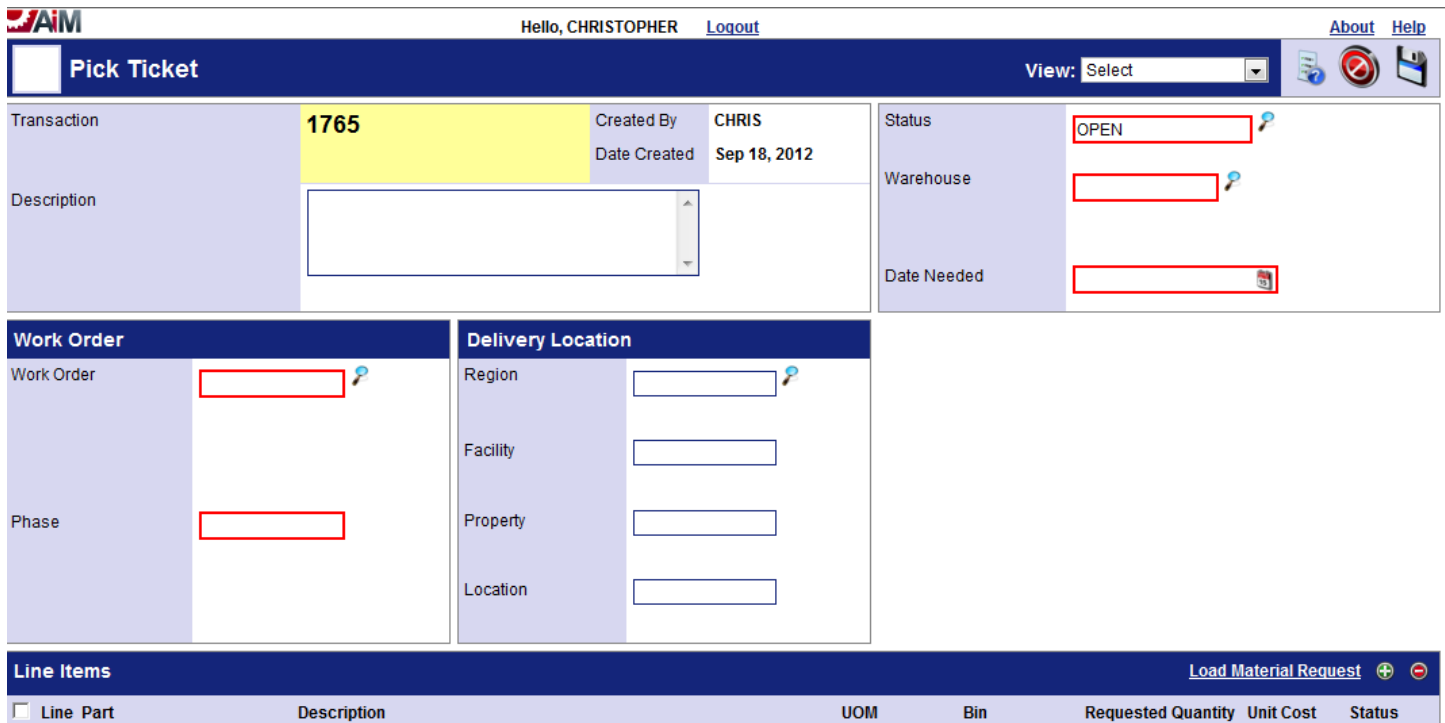
After you've browsed the inventory and are ready to make an order, you can either go back to the Inventory module or to your home page. To return to the main screen, simply click the AiM logo. To return to the main page of the current module, click the box to the left of the blue title bar with white writing.



After you've either re-entered the "Inventory" module or have arrived back at the "Inventory" main page, you can start a new order for stock parts by clicking on the "New Detail" icon to the left of the "Pick Ticket" link on the left-hand side of the screen. The "New Detail" icon looks like a blank sheet of paper.





This will bring you to the "Pick Ticket" screen where you can begin to build your order.



The screenshot displays the "Pick Ticket" screen in the AiM system. The top navigation bar includes the AiM logo, the user name "Hello, CHRISTOPHER", a "Logout" link, and "About" and "Help" links. The main header shows "Pick Ticket" and a "View: Select" dropdown menu. The screen is divided into several sections:

- Transaction Information:** Transaction ID "1765" (highlighted in yellow), Created By "CHRIS", and Date Created "Sep 18, 2012".
- Description:** A large text input field.
- Status:** A dropdown menu set to "OPEN".
- Warehouse:** A dropdown menu.
- Date Needed:** A date input field.
- Work Order Section:**
 - Work Order: Input field.
 - Phase: Input field.
- Delivery Location Section:**
 - Region: Input field.
 - Facility: Input field.
 - Property: Input field.
 - Location: Input field.
- Line Items Section:** A table header with columns: "Line Part", "Description", "UOM", "Bin", "Requested Quantity", "Unit Cost", and "Status". A "Load Material Request" button with plus and minus icons is located to the right of the header.



Enter a meaningful description in the description box:

		Hello, CHRISTOPHER Logout	
Pick Ticket			
Transaction	1765	Created By	CHRIS
		Date Created	Sep 18, 2012
Description	<input type="text" value="This is a test pick ticket for the creation of the user manual"/>		

Next, enter your work order number in the “Work Order” text box and the appropriate work order phase in the “Phase” text box. Each month of the fiscal year has its own phase starting with 001 for July, 002 for August, and so forth.

For a listing of the 2012-2013 standing work orders for stock supply issues from Central Stores, please visit the following link to find the number of the work order that has been assigned to your department:

http://www.fo.ucf.edu/warehouse/stores/2012-2013_BWO.pdf

Work Order	
Work Order	<input type="text" value="12-002811"/> 
	ANNUAL BLANKET WORK ORDER FOR SUPPLIES ORDERED
Phase	<input type="text" value="003"/> 
	09-2012 SHOP SUPPLIES

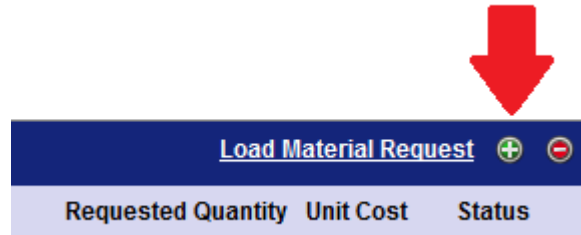
The delivery location will automatically populate as the warehouse since that's where the parts will be waiting for you after the order has been processed:

Delivery 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"/>

Enter "Central Stores" in the "Warehouse" text block in the upper right-hand corner of the screen and select your "Date Needed":

View: Select		About	Help
Status	<input type="text" value="OPEN"/>		
Warehouse	<input type="text" value="CENTRAL STORES"/>		
	CENTRAL STORES WAREHOUSE 0016E		
Date Needed	<input type="text" value="Sep 20, 2012 12:01 PM"/>		

Next, you'll need to add some line items to the Pick Ticket. You can start adding your line items to the Pick Ticket by clicking on the small green "plus sign" in the lower-middle right-hand side of the screen:

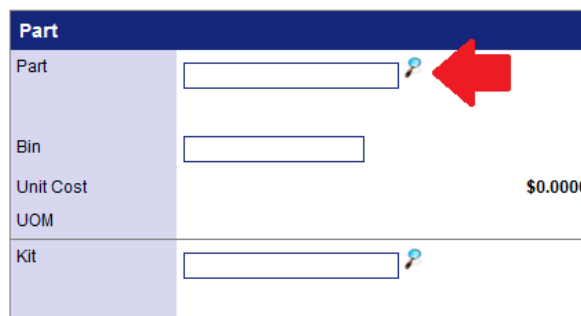


This will bring you to the Pick Ticket Line Item screen where you can select your parts and your desired quantity:



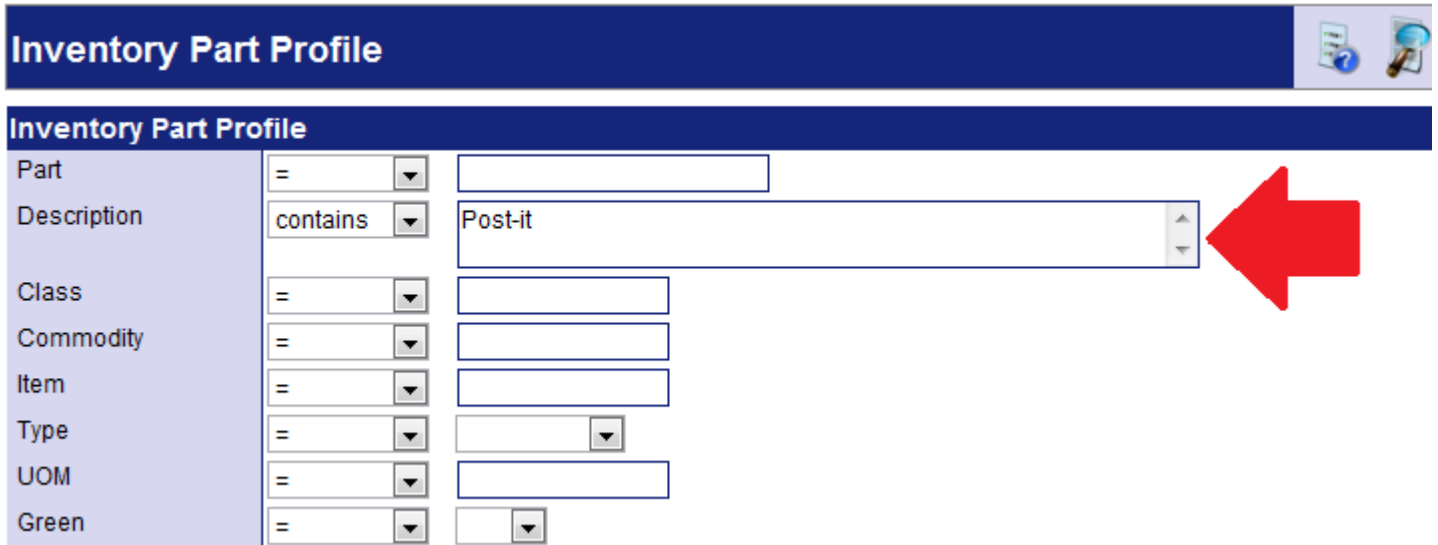
The screenshot shows the "Pick Ticket Line Item" screen. At the top, it says "Hello, CHRISTOPHER" and "Logout". The page title is "Pick Ticket Line Item". Below the title bar, there are several fields: "Line" with the value "1", "Editor" with "CHRIS", "Edit Date" with "Sep 18, 2012 12:02 PM", and "Status" with a dropdown menu set to "Open". The main area is divided into three columns: "Part", "Quantities", and "Material Request". The "Part" column has input fields for "Part", "Bin", "Unit Cost" (displaying "\$0.0000"), "UOM", and "Kit". The "Quantities" column has input fields for "Requested Quantity" (highlighted with a red box), "Quantity on Hand", and "Released Quantity". The "Material Request" column has a "Transaction" field and a "Line" field.

If you want to search for your parts from this screen you may do so by using the same search methodology detailed earlier. In this example, we are going to search for Post-It notes. We start by clicking on the small magnifying glass to the right of the "Part" text box:



This is a close-up of the "Part" input field from the previous screenshot. A red arrow points to the magnifying glass icon located to the right of the text box.

When the Inventory Part Profile search box pops up, enter a part of the item description you are looking for into the "Description" text box:



Inventory Part Profile

Part = []

Description contains Post-it

Class = []

Commodity = []

Item = []

Type = [] []

UOM = []

Green = []

Then click the large magnifying glass in the upper right-hand corner of the same screen to have the system query the parts database for all matching items:



The search results will contain all matching entries:

Inventory Part		
<u>Part</u> ↓	<u>Description</u>	<u>Green</u>
0021001025	POST-IT NOTE PAD 3 X 3 (YELLOW)	No
0021001026	POST-IT NOTE PAD, 3 X 3 POP-UP POST-IT (PAD ONLY - NO DISPENSER)	No
0021001047	LABELS, SIGN HERE FLAGS POST-IT BRAND	No
0021001062	POST-IT NOTE PAD, 1-1/2 X 2 (YELLOW)	No



To add an item to your order, simply click the “Part Number” shown as a hyperlink on the left side of the screen:

Inventory Part	
Part ↓	Description
0021001025	POST-IT NOTE PA
0021001026	POST-IT NOTE PA
0021001047	LABELS, SIGN HE
0021001062	POST-IT NOTE PA

Enter the number of the intended item you would like to request in the “Requested Quantity” text box. Note also that the current available quantity on hand is shown just below the “Requested Quantity” box for reference:


Quantities	
Requested Quantity	<input type="text" value="1"/>
Quantity on Hand	58.0000
Released Quantity	

From here, you can either add more items to your order or you can indicate that you’ve finished adding items. To add more items, click the large green “Plus Sign” in the upper right-hand corner of the screen and follow the same steps as shown above for the remaining items. If you have completed the order, click the green flag in the same area of the upper right-hand corner of the screen:

		About Help
		 
Status	<input type="text" value="Open"/>	


If you need to delete line items from your Pick Ticket, from the main Picket Ticket screen, you would first click in the small box to the left of line item you intend to delete to highlight it:

Line Items			
<input type="checkbox"/>	Line	Part	Description
<input checked="" type="checkbox"/>	1	0021001025	POST-IT NOTE PAD 3 X 3 (YELLOW)



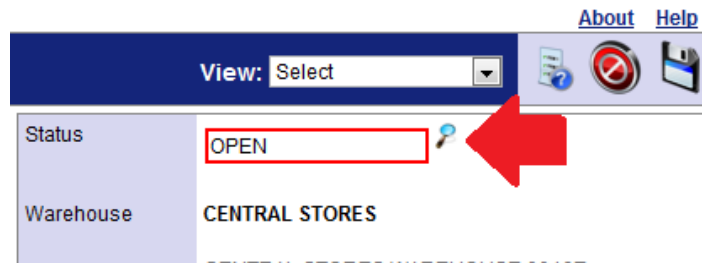
Then you would click the “Delete Line Item” button on the lower right-hand side of the screen to remove the item:

Load Material Request + -		
Requested Quantity	Unit Cost	Status
1.0000	\$1.9500	Open

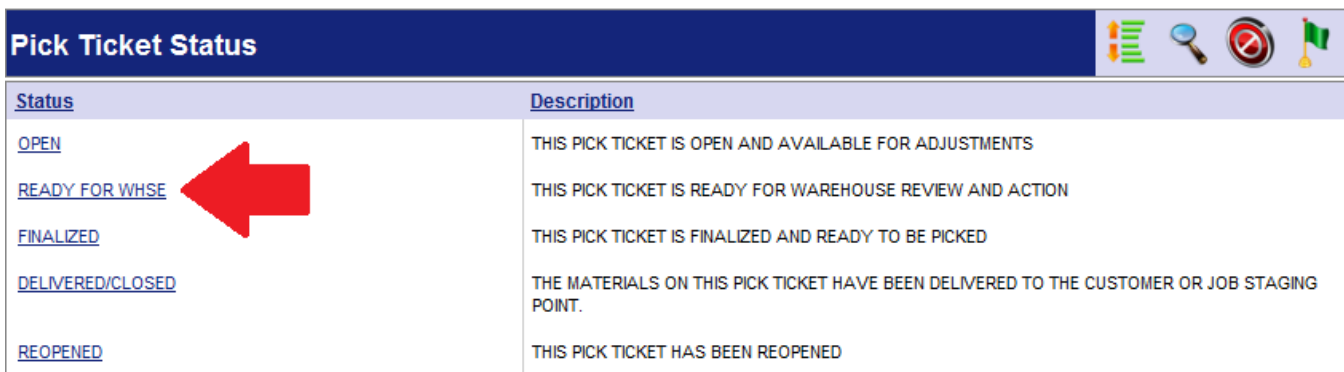


When you’ve finished adding line items to your Pick Ticket, you will be returned to the main Pick Ticket screen. From here, you can either leave the Pick Ticket in “Open” status or change it to “Ready For WHSE”. If you intend to do further work on the order before you are ready for it to be filled, leave it in “Open” status and the warehouse staff will take no action on it. If you are ready for the items to be pulled from inventory and staged for pickup, change the status to “Ready For WHSE” and the staff will be gathering your requested items.

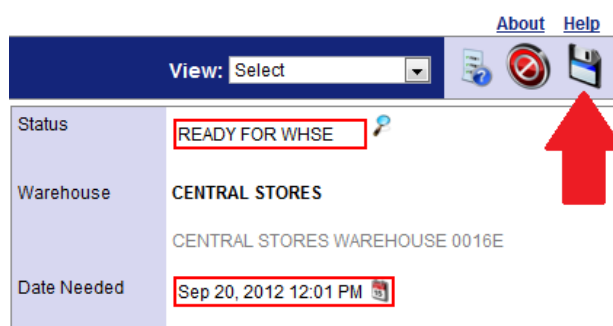
You can change the status on the Pick Ticket by clicking on the small magnifying glass to the right of the "Status" text box in the upper right-hand side of the screen:



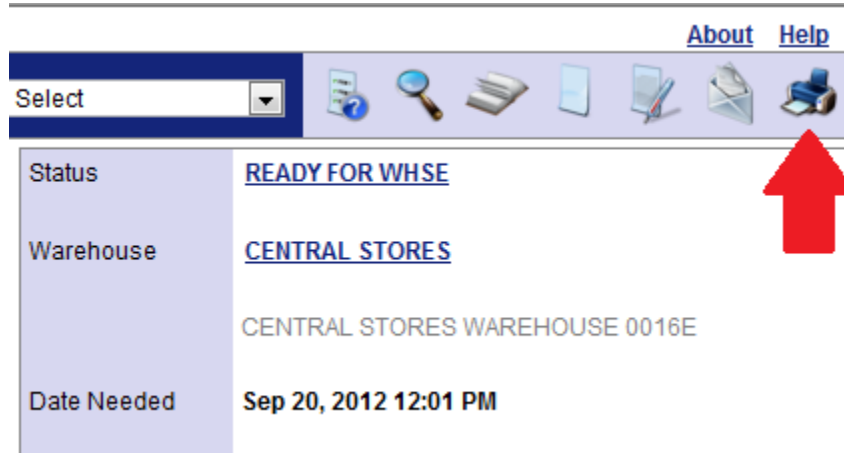
Click on the "Ready For WHSE" status and it will load that status to your Pick Ticket:



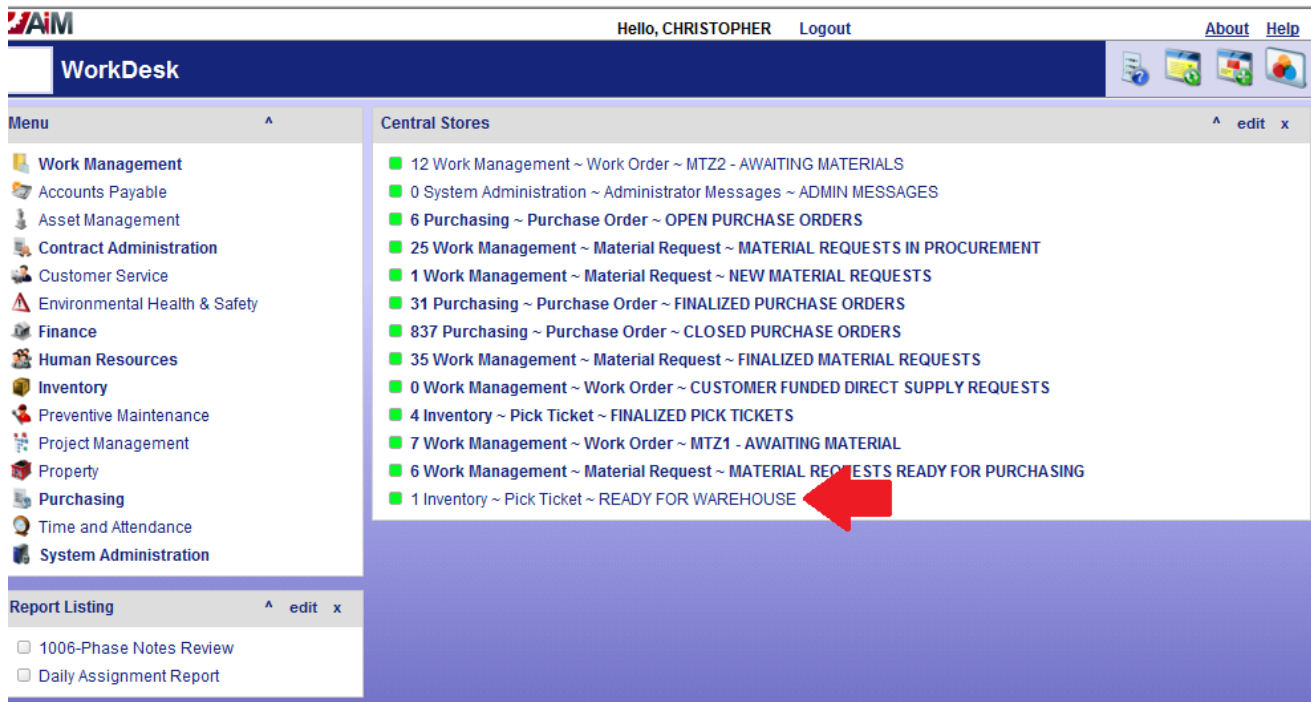
Click the "Save" icon in the upper right-hand side of the screen and you're done!



If you would like to print a copy of your pick ticket, click the printer icon in the upper right-hand corner of the screen. It will appear after you've saved the Pick Ticket. This will launch the printer function where you can send the print job to a printer that you select.



After saving your Pick Ticket, there is no need to call Central Stores as everyone in Stores has a query set up on their work desk that shows the outstanding Pick Tickets that have been submitted in "Ready For WHSE" status:



These orders are filled in the order in which they come in to the queue.

When your items have been gathered, you will receive an email and/or phone call to let you know that your items are available for pickup. When your items are picked up, they will be counter-released to you and your work order will be charged.

Central Stores Contact Information

If you have additional questions, please contact one of the following 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