

# Central Stores User's Manual for AiM CMMS

## ***NON-STOCK PARTS ORDERING PROCESS***

Version 2.0 as of 05-November-2015



## 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 Karlene Kentish, at (407) 823-4264 or via email at [Karlene.Kentish@ucf.edu](mailto:Karlene.Kentish@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

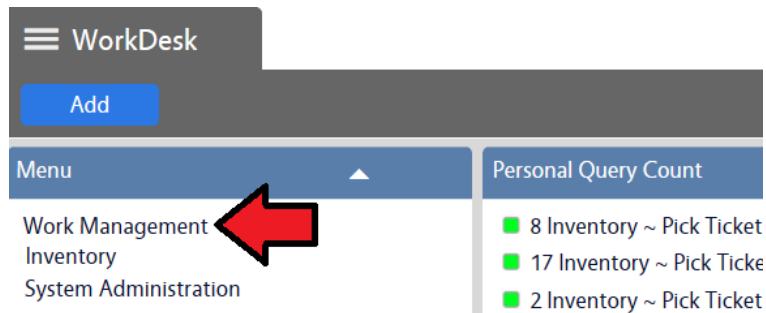
The AiM Suite by AssetWorks is Facilities and Safety’s Computerized Maintenance Management System (CMMS). It also acts as the inventory and purchasing management system for Central Stores. All items ordered through Central Stores, whether stock or non-stock, are requested, tracked, and billed through 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. If you do not know your shop’s **Annual Standing Shop Supplies Work Order** for the current fiscal year, please contact Lance Watkins at [Lance.Watkins@ucf.edu](mailto:Lance.Watkins@ucf.edu).

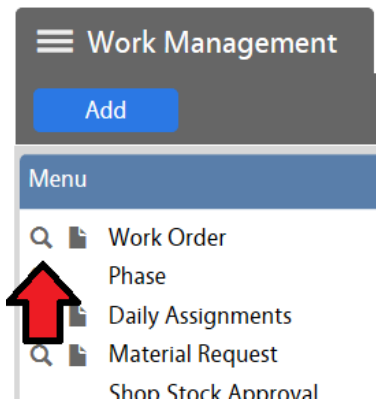
## Starting a New Material Request

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.

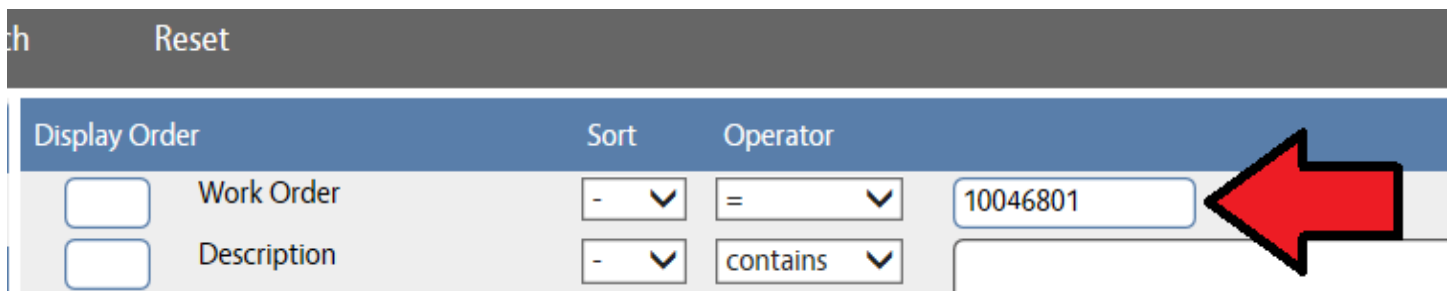
To start a new **Material Request** for a non-stock item, from the Home Page of AiM, click on the “Work Management” link from the menu options to the left.



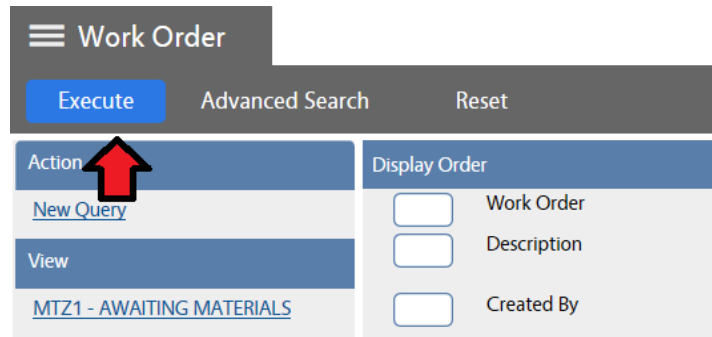
Select the “Search” option for work orders from the left menu (it looks like a magnifying glass and, depending on your web browser, may not display unless you “hover” over it with the mouse pointer):



In the “Work Order” text box, enter either the work order that you are currently working on or enter your shop’s **Annual Standing Shop Supplies Work Order**.




Click the "Execute" button in the upper left-hand corner of the screen to load your intended work order.




When your work order has been loaded, click the work order link on the left to enter the work order detail screen.

<u>Work Order</u> ↑	<u>Description</u>	<u>Status</u>	<u>Type</u>	<u>Category</u>
<a href="#">10046801</a>	2015-2016 BLANKET WORK ORDER FOR SHOP STOCK PURCHASES FROM CENTRAL STORES BY MEMBERS OF THE RESOURCE MANAGEMENT SURPLUS RESALE PROGRAM	OPEN	STANDING	SHOP SUPPLIES

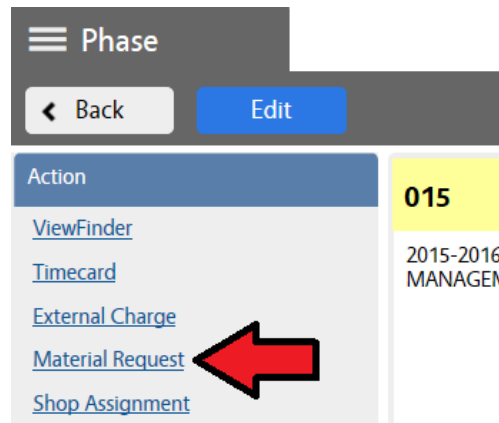


For this example, we are using an **Annual Standing Shop Supplies Work Order**. Near the bottom of the screen, you will notice that the work order has a Phase. Click the appropriate Phase against which you would like to have the materials billed. (For most **Annual Standing Shop Supplies Work Order**, there will be only one open phase at any given time)

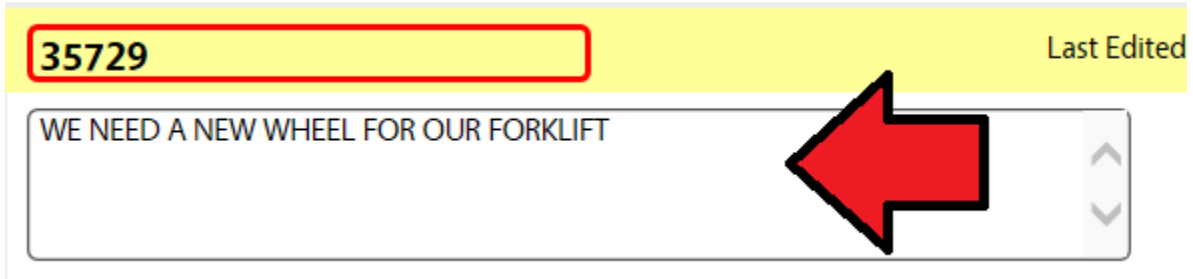
Phase			
Phase	Description	Location (Room Number)	Shop
<a href="#">015</a>	2015-2016 ANNUAL BLANKET WORK ORDER FOR SHOP STOCK PURCHASES FROM CENTRAL STORES BY MEMBERS OF THE RESOURCE MANAGEMENT SURPLUS RESALE PROGRAM	0100	RM-SURPLUS RESALE



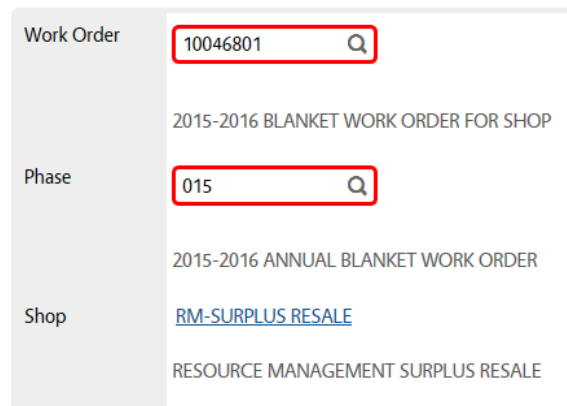
After you've entered the Phase detail screen, look for the "Material Request" link on the left-hand side of the screen under the "Action" box.



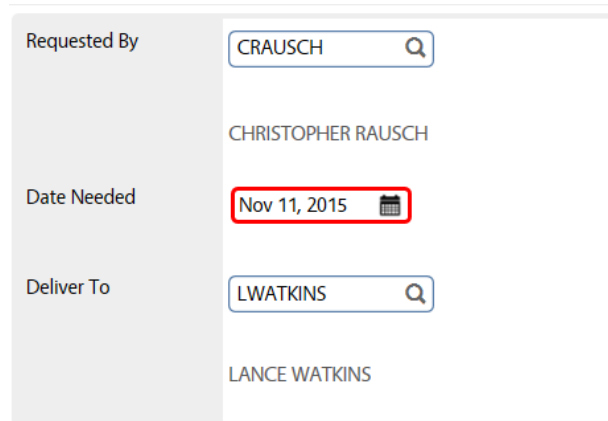
Click the link to launch a new **Material Request**. When the new **Material Request** screen loads, the first thing to do is to enter a meaningful description of the request. There is no preferred format to this other than "the more information that's included the better".



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:

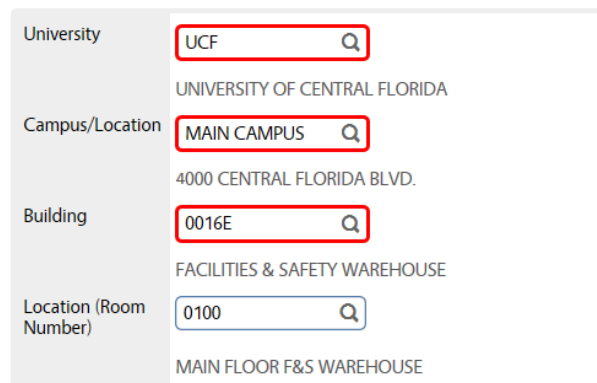


Requested By: CRAUSCH  
CHRISTOPHER RAUSCH

Date Needed: Nov 11, 2015

Deliver To: LWATKINS  
LANCE WATKINS

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



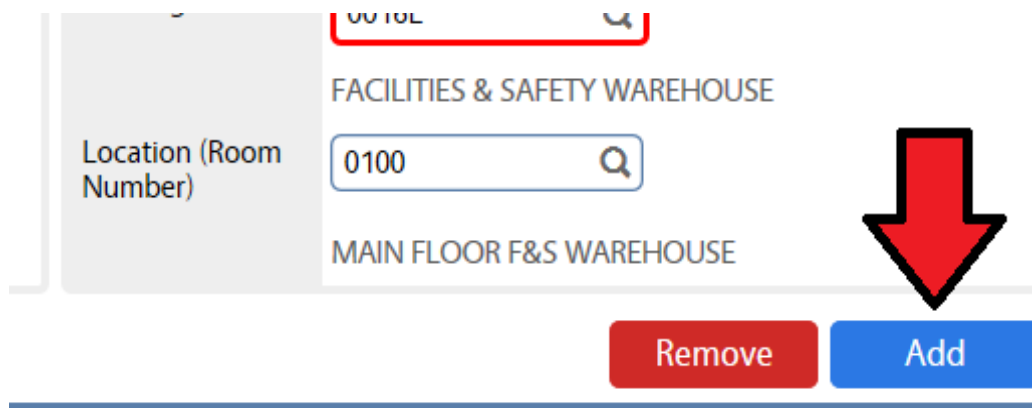
University: UCF  
UNIVERSITY OF CENTRAL FLORIDA

Campus/Location: MAIN CAMPUS  
4000 CENTRAL FLORIDA BLVD.

Building: 0016E  
FACILITIES & SAFETY WAREHOUSE

Location (Room Number): 0100  
MAIN FLOOR F&S WAREHOUSE

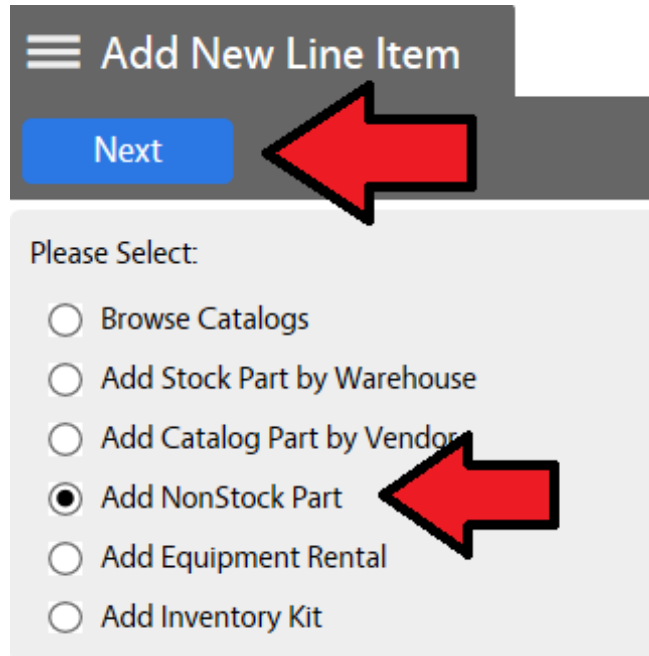
Start adding line items to your **Material Request** by clicking on the "Add" button on the lower right-hand side of the screen:



Location (Room Number): 0100  
MAIN FLOOR F&S WAREHOUSE

Remove Add

On the "Add New Line Item" screen, select "Add Non-Stock Part" then click the "Next" button on the upper left-hand side of the screen:



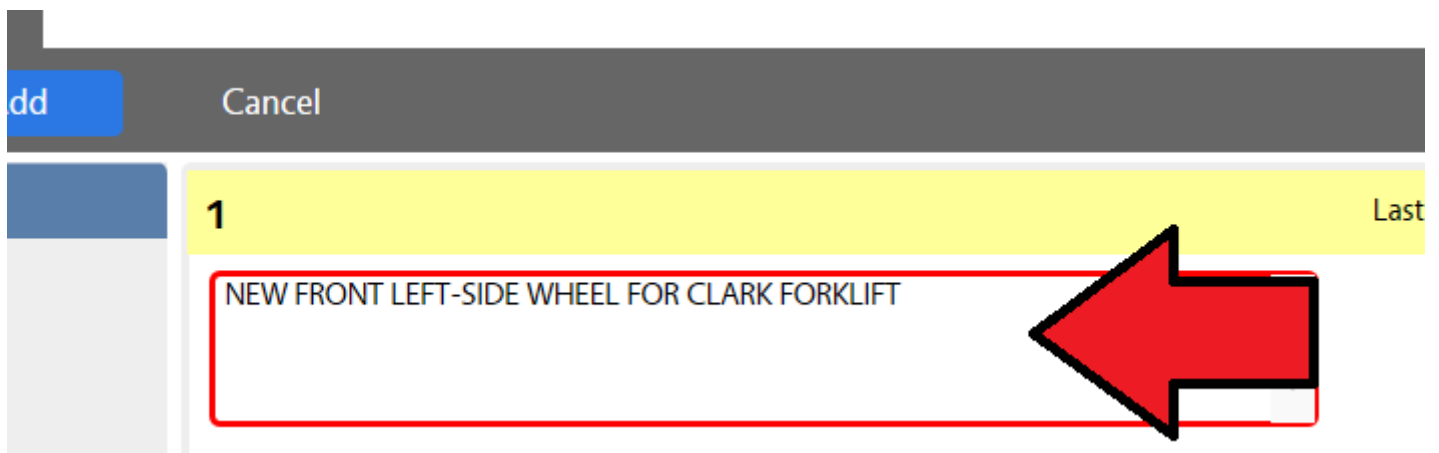
☰ Add New Line Item

Next

Please Select:

- Browse Catalogs
- Add Stock Part by Warehouse
- Add Catalog Part by Vendor
- Add NonStock Part
- Add Equipment Rental
- Add Inventory Kit

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



Add Cancel

1	Last
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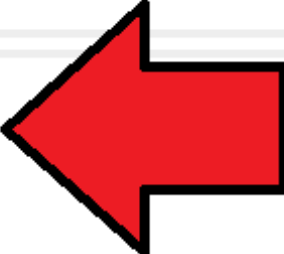
NEW FRONT LEFT-SIDE WHEEL FOR CLARK FORKLIFT

Enter the vendor "Short Code" in the "Contractor" box. If you do not know the code, use the search feature to locate the vendor. If you do not have a preferred vendor in mind and would like Central Stores to source the item from the best available vendor, use short code "00-UNKNOWN". For this example, we'll assume we know the vendor code.

Contractor	<input type="text" value="INNOVATIVE LIFT"/> <input type="button" value="Q"/>
	INNOVATIVE LIFT TRUCKS, INC.
Address Code	<input type="text" value="010"/> <input type="button" value="Q"/>
	20900 SHELDON SDT.
	ORLANDO
	32833



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

Part	<input type="text" value="CLK8876GH54"/>
UOM	<input type="text" value="EA"/> <input type="button" value="Q"/>
THIS INVENTORY ITEM IS ONLY SOLD IN DISCRETE	



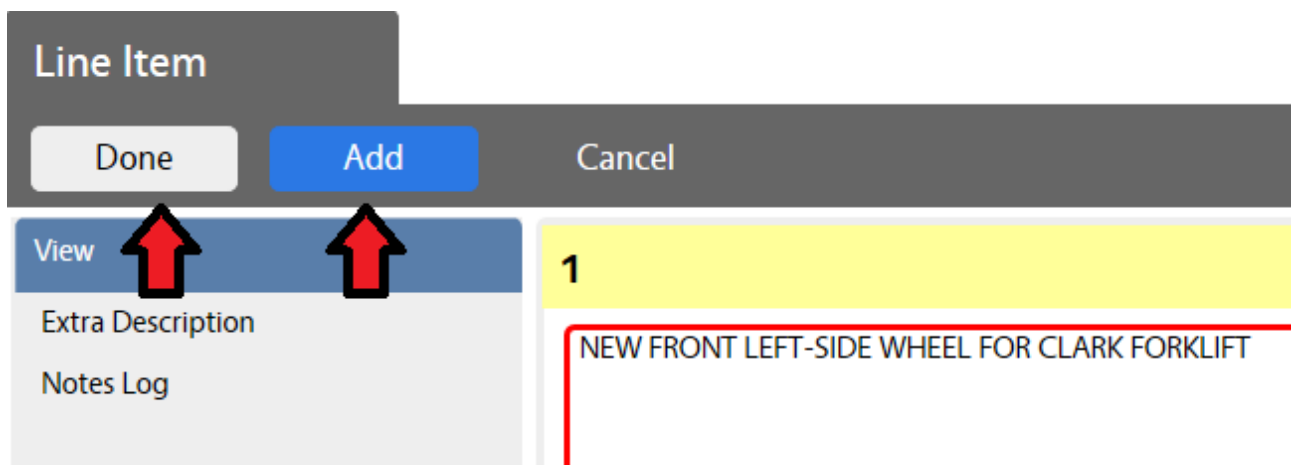


Enter the quantity and the Unit Cost (if known) in the Totals section:

Quantity		<input type="text" value="1.0000"/>
Unit Cost		<input type="text" value="287.60"/>
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 "Add" button to add another item to the request or you can click the "Done" button to indicate that you've finished entering items for this request. Both buttons are located in the upper left-hand corner of the screen:



Line Item

Done Add Cancel

View  

Extra Description

Notes Log

1

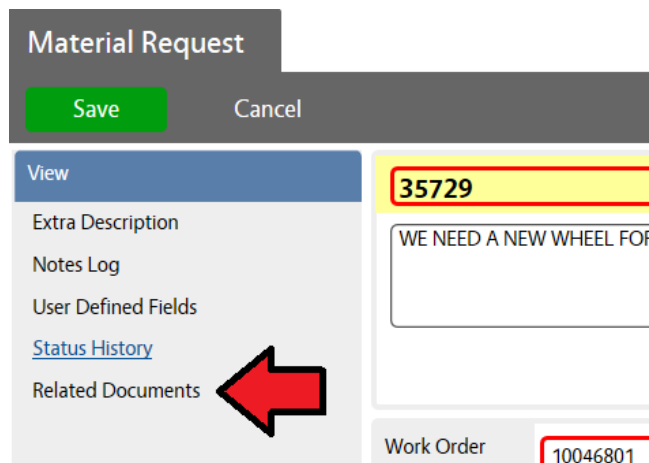
NEW FRONT LEFT-SIDE WHEEL FOR CLARK FORKLIFT

**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 “Done” button to indicate you have finished adding items.

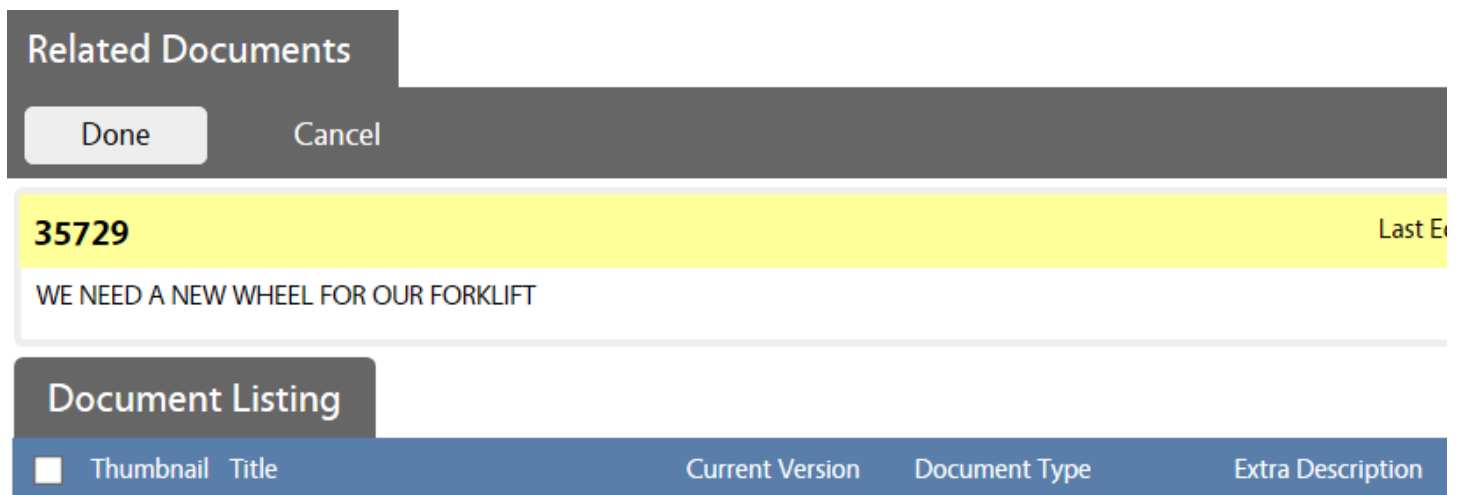
### Adding Related Documents and/or Images to a Material Request

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.

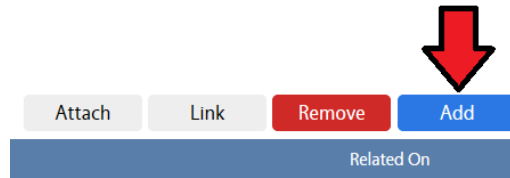
First, you will need to access the “Related Documents” screen by clicking on the “Related Documents” link on the left-hand side of the screen under the “View” menu box.



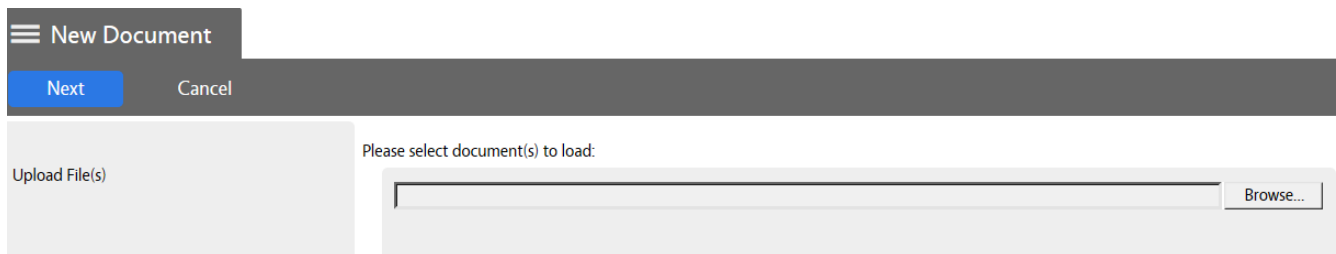
This will take you to the upload screen where you can add your files.



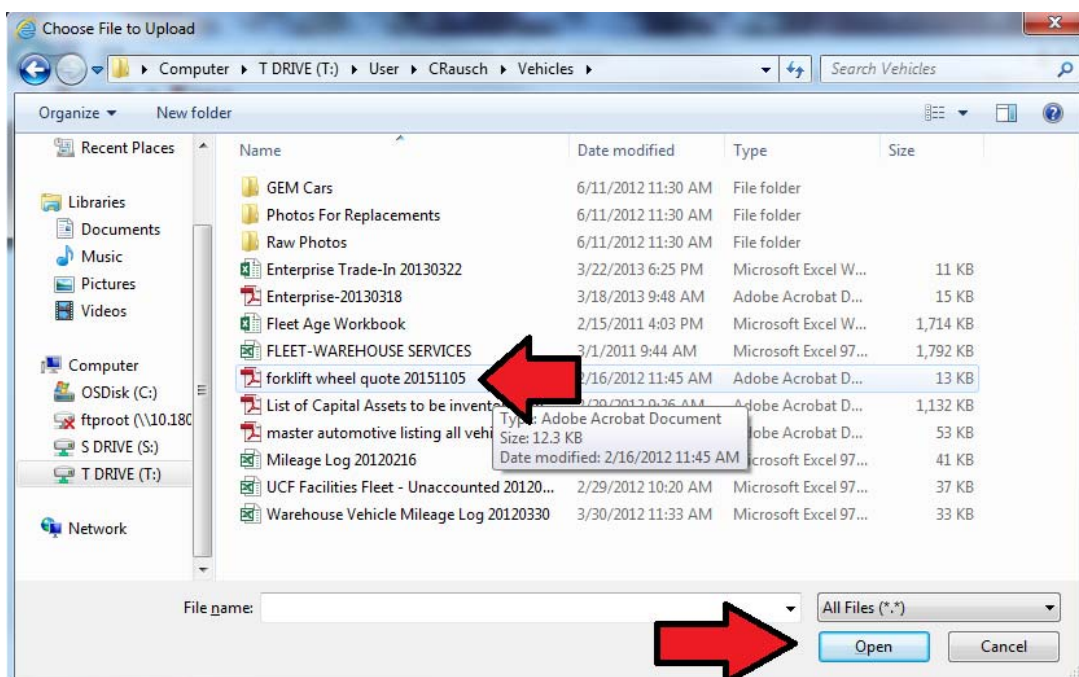
To add a new file to the system, click the “Add” button on the lower right-hand side of the screen. In this example, we are going to add a quote from the vendor to the Material Request.



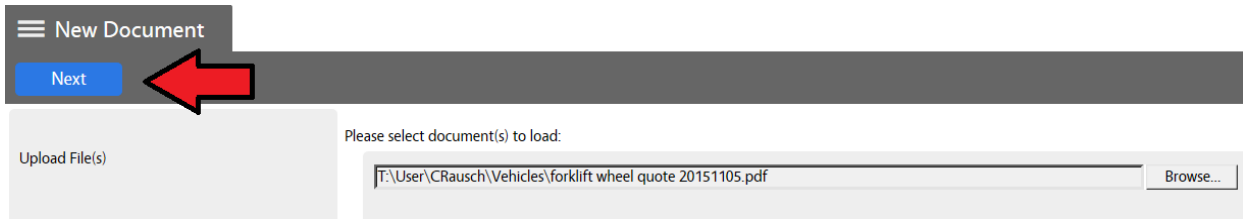
This will bring you to the second upload screen where you can browse for the document on your computer or on the network:



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 “Next” button in the upper left-hand corner of the screen.



You will need to enter a description for your document and select the document type. For most non-stock orders, your document type will be either “GENERAL” or “IMAGE”.

Title

Type

Select the document type by clicking on the name. After you have selected the document type and have entered a description, click the “Next” button three times to move past the current screen, the Attributes screen, and the Permissions screen. This will bring you back to the main Related Documents screen.


Related Documents LANCE About Logout

Done Cancel **AiM**

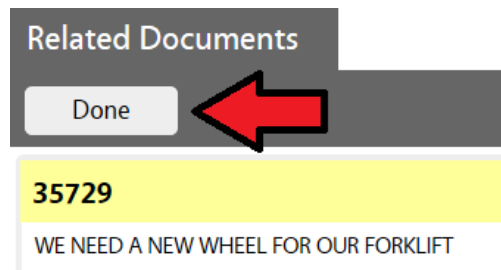
**35729** Last Edited by LANCE WATKINS On 11/05/2015 04:50 PM

WE NEED A NEW WHEEL FOR OUR FORKLIFT

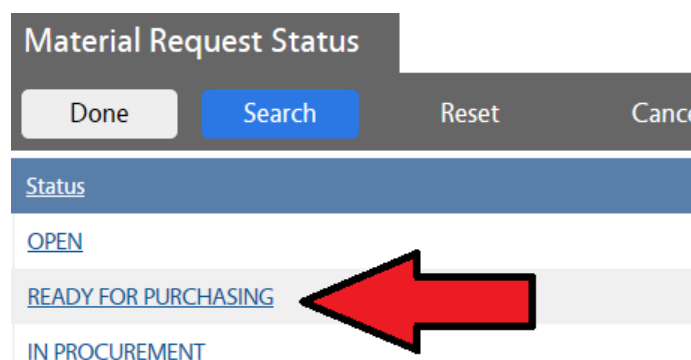
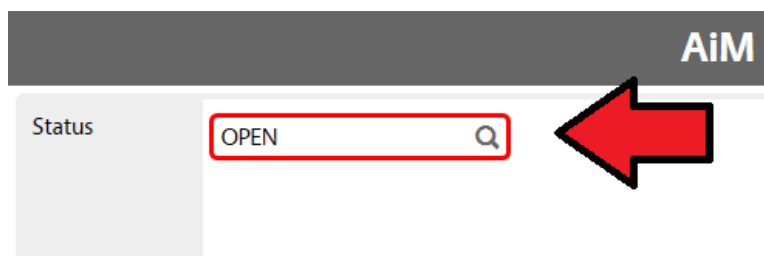
Document Listing Attach Link Remove Add

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	<a href="#">forklift wheel quote 20151105.pdf</a>	1.0	GENERAL		Nov 05, 2015

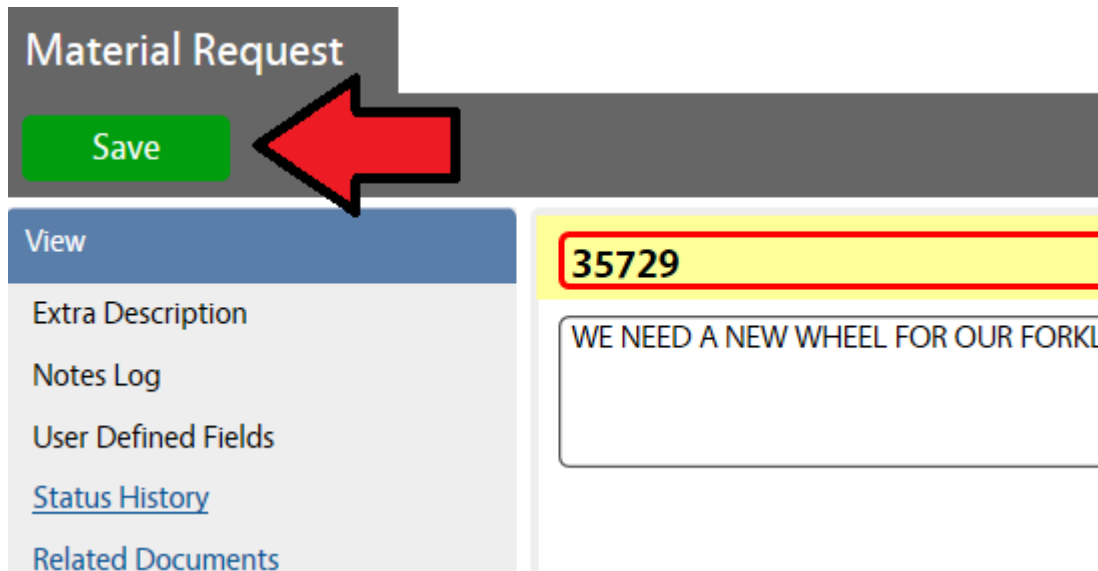
If you need to attach additional documents to your Material Request, simply repeat the steps above until they have all been loaded. If you are finished adding documents, click on the “Done” button from the Related Documents screen to return to the main Material Request screen.



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:

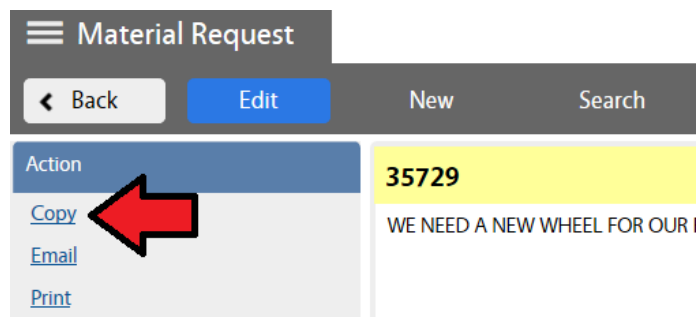


After you have changed the status of the Material Request to “Ready for Purchasing”, click the “Save” button in the upper left-hand corner of the screen to send the request to the buyers.



This action will alert the Central Stores staff that a new purchase request has been submitted and is ready to be fulfilled. 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.


If you are making repetitive purchases charged to different work order phases, it is recommended that you use the “Copy” function from the main Material Request screen to save time. By using this feature, you will only need to change the work order(s) and phase(s) to which the item(s) will be charged.



Additionally, you may email or print a copy of your request from the links directly below the “Copy” link.

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 name will be displayed.

<b>35729</b>	Last Edited by LANCE WATKINS On 11/05/2015 05:40 PM	Status	<a href="#">IN PROCUREMENT</a>
WE NEED A NEW WHEEL FOR OUR FORKLIFT		Total	



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.
- 6.

**TIP: Non-stock and stock items may be ordered from the same Material Request provided that all material is being billed to the same Work Order and Phase. If different parts are intended for different work orders, please use separate Material Requests for each.**

## 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
Brandon Baker	(407) 823-4449	<a href="mailto:brandon.baker@ucf.edu">brandon.baker@ucf.edu</a>
Cheryl Sanderson	(407) 823-2986	<a href="mailto:cheryl.sanderson@ucf.edu">cheryl.sanderson@ucf.edu</a>
George Rivera	(407) 823-3681	<a href="mailto:jorge.rivera@ucf.edu">jorge.rivera@ucf.edu</a>
Lance Watkins	(407) 823-4082	<a href="mailto:lance.watkins@ucf.edu">lance.watkins@ucf.edu</a>