

Central Stores User's Manual for AiM CMMS

STOCK PARTS ORDERING PROCESS

Version 2.0 as of 05-November-2015



System Access

If you need to order 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. 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.

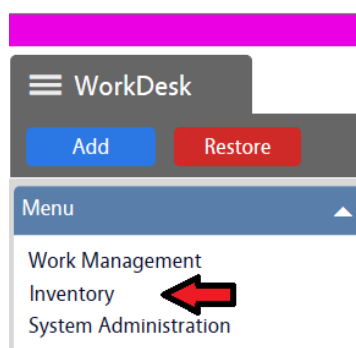
Overview of Stock Issues from Central Stores within AiM

The AiM Suite by AssetWorks is Facilities & Safety’s 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.

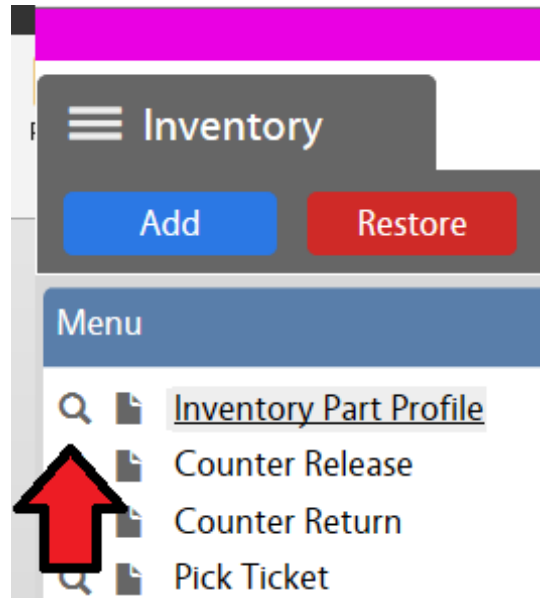
All billing activities within AiM are directly linked to work orders. If you are not currently using AiM to manage your department’s or shop’s work orders, an Annual Blanket Supply Issue work order has been issued for your use to order stock parts from Central Stores. A listing of the Shop Supply Work Orders for the current fiscal year may be obtained through email from Lance Watkins in Resource Management (Lance.Watkins@ucf.edu).

Starting an Order – 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 the small magnifying glass to the left of the menu item description.







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.

Display Order	Sort	Operator	
<input type="checkbox"/> Part	-	=	<input type="text"/> ← 1.
<input type="checkbox"/> Description	-	contains	<input type="text"/> ← 2.

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...

Display Order		Sort	Operator	
<input type="checkbox"/>	Part	- ▾	= ▾	<input type="text"/>
<input type="checkbox"/>	Description	- ▾	contains ▾	<input type="text"/>
<input type="checkbox"/>	Class	- ▾	= ▾	<input type="text"/>  
<input type="checkbox"/>	Commodity	- ▾	= ▾	<input type="text"/> 
<input type="checkbox"/>	Item	- ▾	= ▾	<input type="text"/> 

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

Inventory Class	
Class ↓	Description
ABRASIVES	SANDPAPER, GRINDING WHEELS, TUMBLERS, ABRASIVE DRILL BITS
ADHESIVES	ADHESIVES, SEALANTS, AND TAPES
AUTOMOTIVE	AUTOMOTIVE PARTS - ALL TYPES
BANNERS/FLAGS	BANNERS/FLAGS
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	EMEGENCY SUPPLIES, GENERATORS, EMERGENCY LIGHTING, ETC.

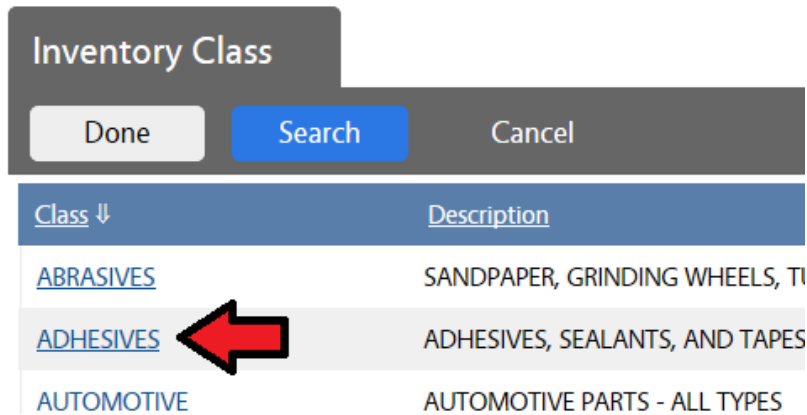


Click these links to see the various commodities for each inventory class.

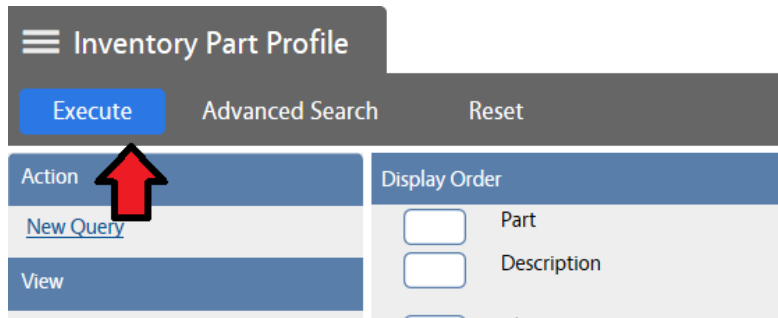


Use the navigation controls to move through the available pages.

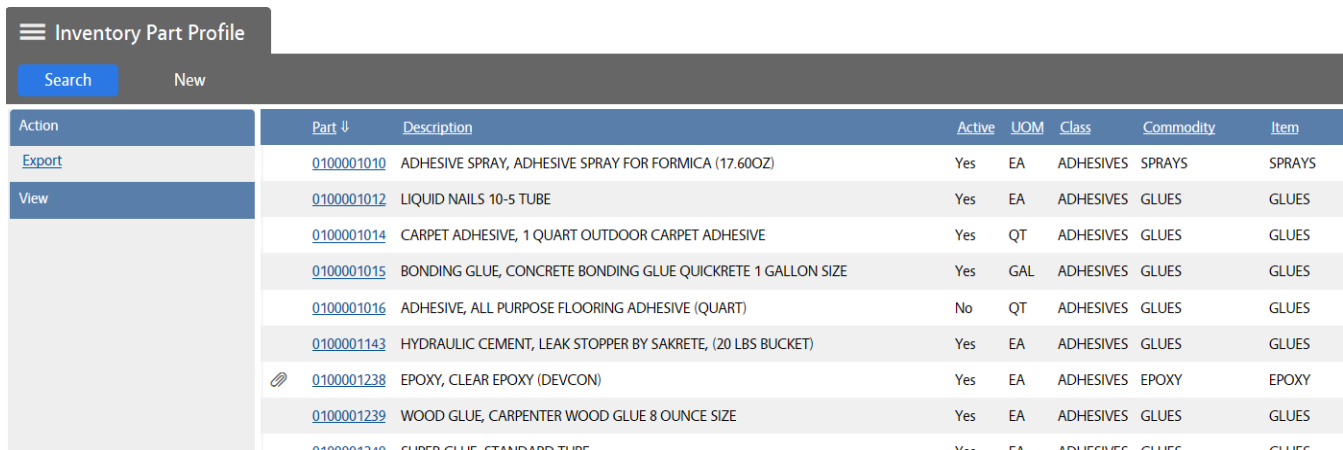
Let's suppose that we want to browse the available "Adhesives" in the warehouse. We would click on the "Adhesives" link...



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



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





Inventory Part Profile

Search New

Action	Part ↓	Description	Active	UOM	Class	Commodity	Item
Export	0100001010	ADHESIVE SPRAY, ADHESIVE SPRAY FOR FORMICA (17.60OZ)	Yes	EA	ADHESIVES	SPRAYS	SPRAYS
View	0100001012	LIQUID NAILS 10-5 TUBE	Yes	EA	ADHESIVES	GLUES	GLUES
	0100001014	CARPET ADHESIVE, 1 QUART OUTDOOR CARPET ADHESIVE	Yes	QT	ADHESIVES	GLUES	GLUES
	0100001015	BONDING GLUE, CONCRETE BONDING GLUE QUICKRETE 1 GALLON SIZE	Yes	GAL	ADHESIVES	GLUES	GLUES
	0100001016	ADHESIVE, ALL PURPOSE FLOORING ADHESIVE (QUART)	No	QT	ADHESIVES	GLUES	GLUES
	0100001143	HYDRAULIC CEMENT, LEAK STOPPER BY SAKRETE, (20 LBS BUCKET)	Yes	EA	ADHESIVES	GLUES	GLUES
	0100001238	EPOXY, CLEAR EPOXY (DEVCON)	Yes	EA	ADHESIVES	EPOXY	EPOXY
	0100001239	WOOD GLUE, CARPENTER WOOD GLUE 8 OUNCE SIZE	Yes	EA	ADHESIVES	GLUES	GLUES
	0100001240	SLIPER GLUE (STANDARD TUBE)	Yes	EA	ADHESIVES	GLUES	GLUES

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 Number 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 (if a photo is available).

Inventory Part Profile
LANCE About Logot

Edit New Search Browse
AiM

Action

[Email](#)

[Print](#)

View

Extra Description

Substitute Parts

[Vendors](#)

[Warehouses](#)

Kit Usage

Sent Email

Notes Log

User Defined Fields


[Related Documents](#)

0100001238 Last Edited by CHRISTOPHER RAUSCH On 07/27/2012 12:39 PM

EPOXY, CLEAR EPOXY (DEVCON)

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

Average Cost	\$6.8300	Last Issue	Nov 05, 2014 10:44 AM
		Last Commitment	Nov 05, 2014 10:44 AM
On Hand Value	\$27.32	Last Disbursed	
		Last Adjustment	Oct 02, 2012 12:05 PM



Active	Yes	UOM	EA
UOM Fractional	No	THIS INVENTORY ITEM IS ONLY SOLD IN DISCRETE	
On Hand	4.000	Committed	0.000
On Order	0.000	Expected	4.000

The current price of the item can be seen in the lower left-hand corner of the screen.

Average Cost	\$6.8300
On Hand Value	\$27.32

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

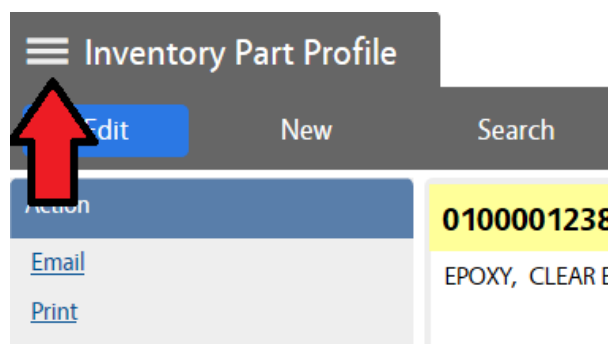
On Hand	4.0000
Committed	0.0000
On Order	0.0000
Expected	4.0000

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.

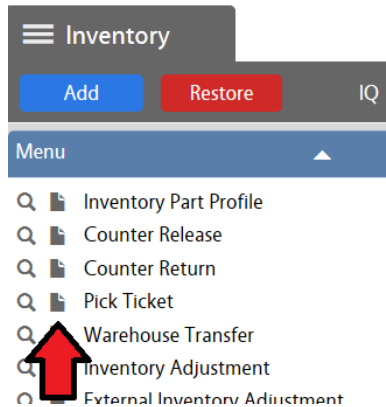
After you've browsed the inventory and are ready to make an order, you can either go back to the Inventory module or to your home page. To return to the Home Page, simply click the AiM logo in the upper right-hand side of the screen.



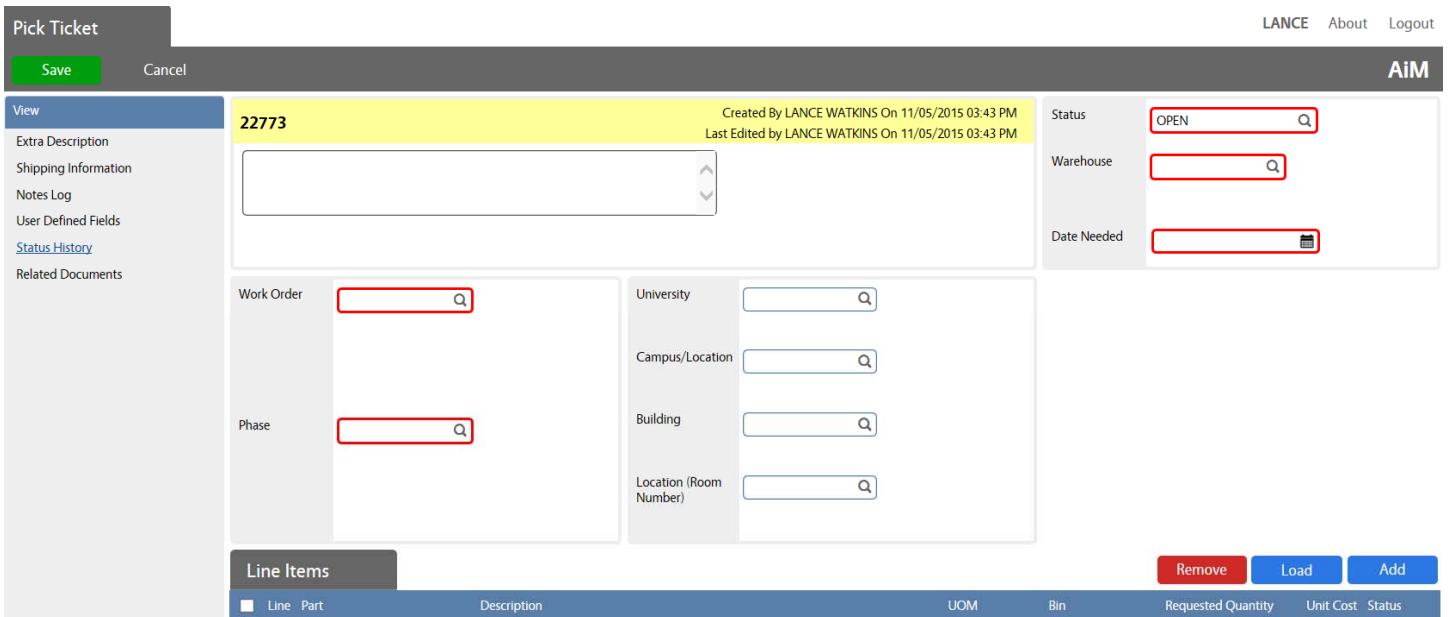
To return to the Inventory Module, click the link with the three bars to the left of the title at the top.



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 shows the 'Pick Ticket' screen in the AiM system. The top header includes 'Pick Ticket', 'Save', 'Cancel', and 'AiM'. The main content area is divided into several sections:

- Header:** '22773' (highlighted in yellow), 'Created By LANCE WATKINS On 11/05/2015 03:43 PM', and 'Last Edited by LANCE WATKINS On 11/05/2015 03:43 PM'.
- Form Fields:** 'Status' (dropdown menu with 'OPEN' selected), 'Warehouse' (text input), and 'Date Needed' (calendar icon).
- Work Order Section:** 'Work Order' (text input), 'University' (text input), 'Campus/Location' (text input), 'Phase' (text input), 'Building' (text input), and 'Location (Room Number)' (text input).
- Line Items Section:** A table with columns: Line, Part, Description, UOM, Bin, Requested Quantity, Unit Cost, and Status. The table is currently empty.
- Buttons:** 'Remove', 'Load', and 'Add' buttons are located at the bottom right of the Line Items section.

Enter a meaningful description in the description box:

22773	Created By I Last Edited by I
<div style="border: 1px solid gray; padding: 5px;"> <p>This is a test pick ticket for the creation of the users' manual</p> </div>	



Next, enter your work order number in the “Work Order” text box and the appropriate work order phase in the “Phase” text box. If you do not know the current work order number for your department, please contact Lance Watkins at Lance.Watkins@ucf.edu.

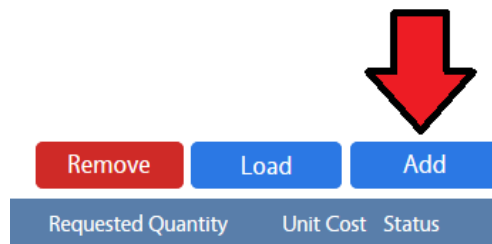
Work Order	<input style="border: 2px solid red;" type="text" value="10046801"/> <input type="button" value="Q"/>	University	<input type="text" value="UCF"/> <input type="button" value="Q"/>
	2015-2016 BLANKET WORK ORDER FOR SHOP		UNIVERSITY OF CENTRAL FLORIDA
Phase	<input style="border: 2px solid red;" type="text" value="015"/> <input type="button" value="Q"/>	Campus/Location	<input type="text" value="MAIN CAMPUS"/> <input type="button" value="Q"/>
	2015-2016 ANNUAL BLANKET WORK ORDER FOR		4000 CENTRAL FLORIDA BLVD.
		Building	<input type="text" value="0016E"/> <input type="button" value="Q"/>
			FACILITIES & SAFETY WAREHOUSE
		Location (Room Number)	<input type="text" value="0100"/> <input type="button" value="Q"/>

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

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

Status	<input type="text" value="OPEN"/>
Warehouse	<input type="text" value="CENTRAL STORES"/>
	CENTRAL STORES WAREHOUSE 0016E
Date Needed	<input type="text" value="11/06/2015"/>

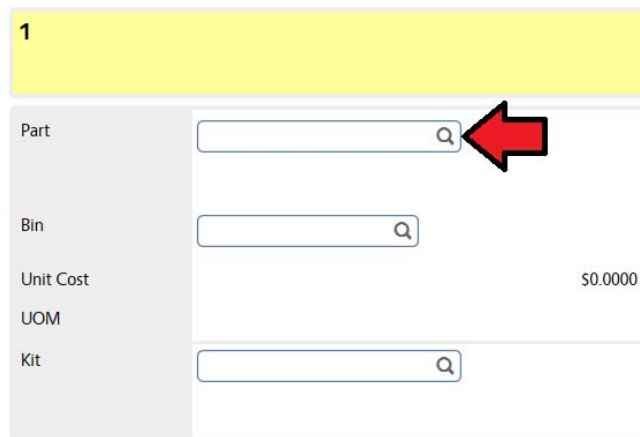
Next, you'll need to add some line items to the Pick Ticket. You can start adding your line items to the Pick Ticket by clicking on the "Add" button in the lower right-hand side of the screen.






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

Pick Ticket Line Item		About Logout	
Done Add Cancel		AiM	
1		Last Edited by LANCE WATKINS On 11/05/2015 03:50 PM	
		Status	<input type="text" value="Open"/>
Part	<input type="text"/>	Requested Quantity	<input type="text"/>
Bin	<input type="text"/>	Quantity on Hand	
Unit Cost	50.0000	Released Quantity	
UOM			
Kit	<input type="text"/>		
		Transaction	
		Line	

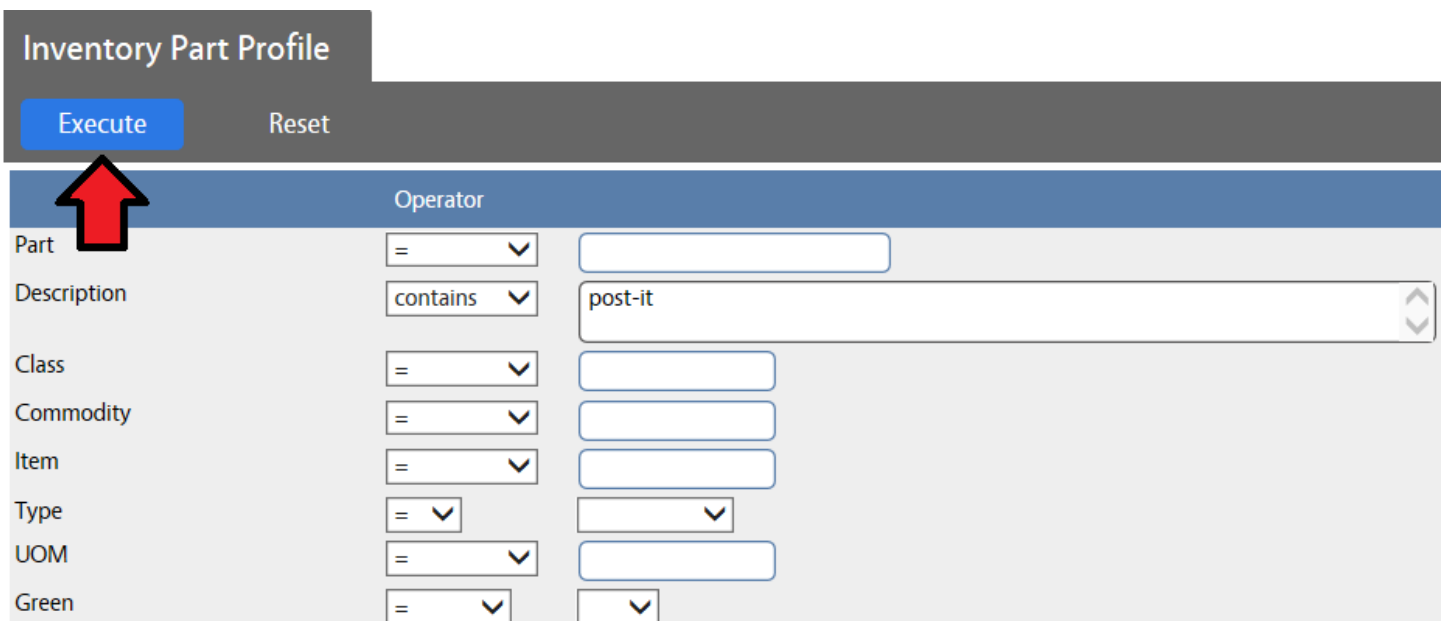
If you want to search for your parts from this screen you may do so by using the same search methodology detailed earlier. In this example, we are going to search for Post-It notes. We start by clicking on the small magnifying glass to the right of the "Part" text box.



1

Part	<input type="text"/>	
Bin	<input type="text"/>	
Unit Cost		50.0000
UOM		
Kit	<input type="text"/>	

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. Then click the "Execute" button in the upper left-hand corner of the same screen to have the system query the parts database for all matching items.



Inventory Part Profile

Execute Reset

Operator		
Part	=	<input type="text"/>
Description	contains	post-it
Class	=	<input type="text"/>
Commodity	=	<input type="text"/>
Item	=	<input type="text"/>
Type	=	<input type="text"/>
UOM	=	<input type="text"/>
Green	=	<input type="text"/>

The search results will contain all matching entries:

Inventory Part		
Done	Search	Cancel
		AiM
Part ↓	Description	Green
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

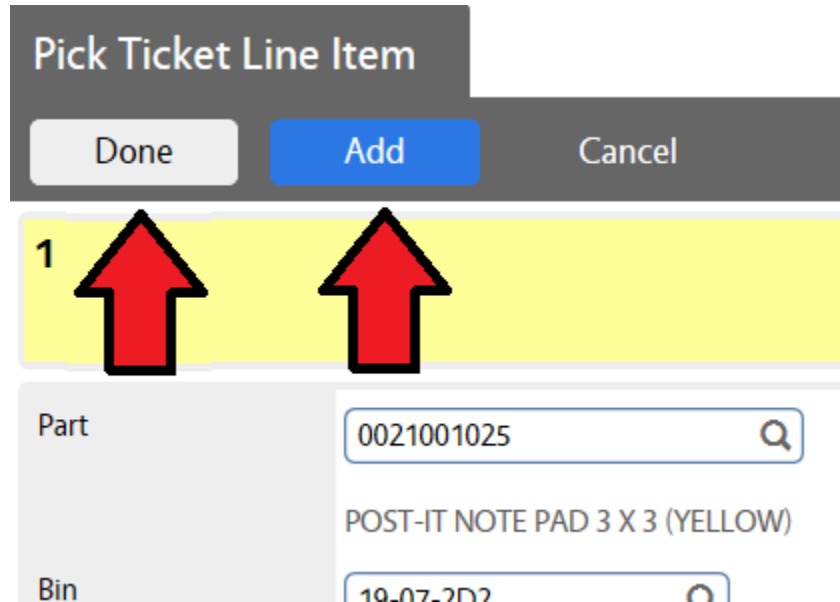
To add an item to your order, simply click the “Part Number” shown as a hyperlink on the left side of the screen.

Part ↓	Description
0021001025	POST-IT NOTE PAD 3 X 3
0021001026	POST-IT NOTE PAD, 3 X 3
0021001047	LABELS, SIGN HERE FLAG
0021001062	POST-IT NOTE PAD, 1-1/2

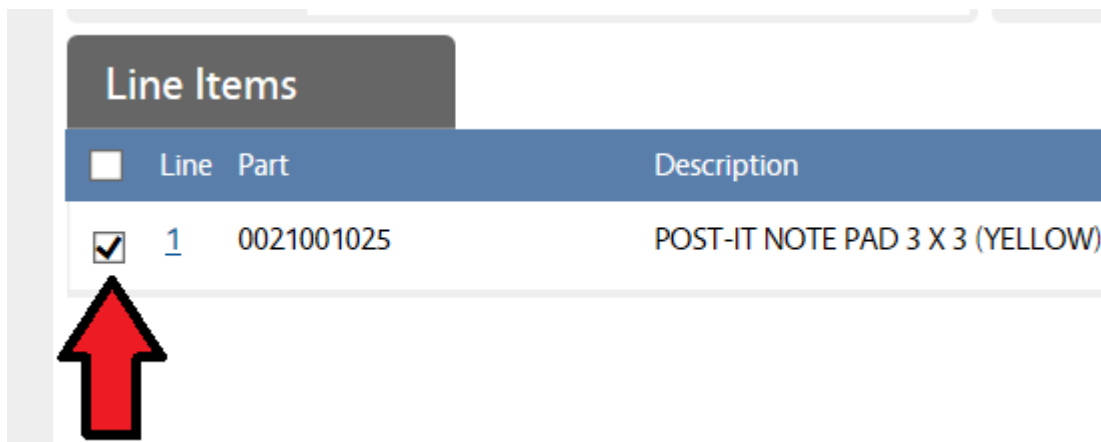
Enter the number of the intended item you would like to request in the “Requested Quantity” text box. Note also that the current available quantity on hand is shown just below the “Requested Quantity” box for reference.

Requested Quantity	<input type="text" value="1"/>
Quantity on Hand	21.0000
Released Quantity	

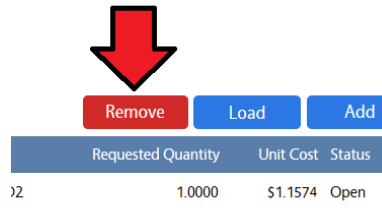
From here, you can either add more items to your order or you can indicate that you've finished adding items. To add more items, click the "Add" button in the upper left-hand side of the screen and follow the same steps as shown above for the remaining items. If you have completed the order, click the "Done" button in the same area of the upper left-hand corner of the screen.



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:

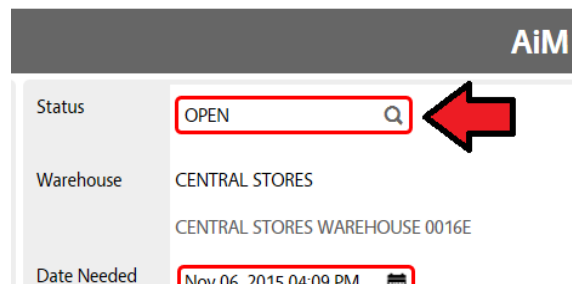


Then you would click the “Remove” button on the lower right-hand side of the screen to remove the item from the pick ticket.

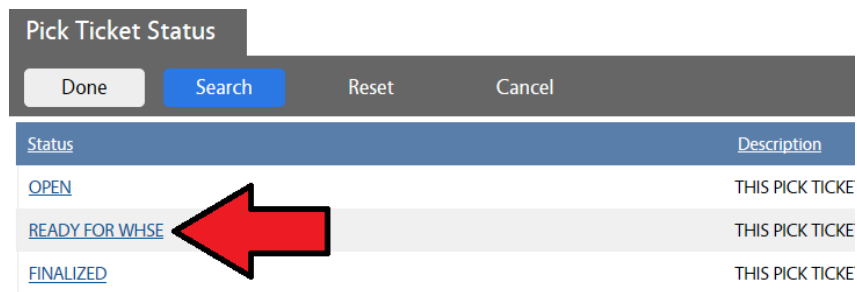


When you’ve finished adding or removing line items to your Pick Ticket, you will be returned to the main Pick Ticket screen. From here, you can either leave the Pick Ticket in “Open” status or change it to “Ready for WHSE”. If you intend to do further work on the order before you are ready for it to 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 begin gathering your requested item(s).

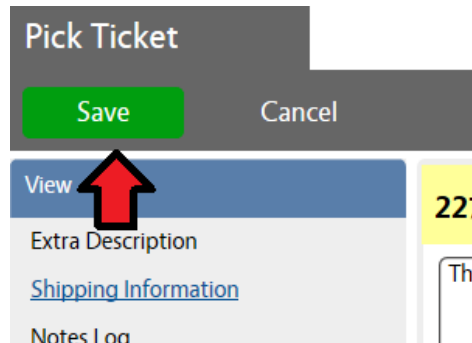
You can change the status on the Pick Ticket by clicking on the small magnifying glass to the right of the “Status” text box in the upper right-hand side of the screen:



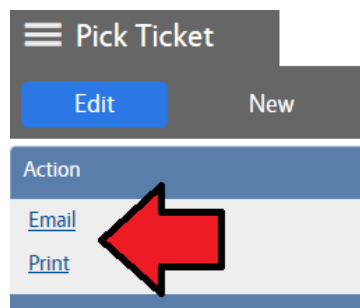
Click on the “READY FOR WHSE” status and it will load that status to your Pick Ticket.



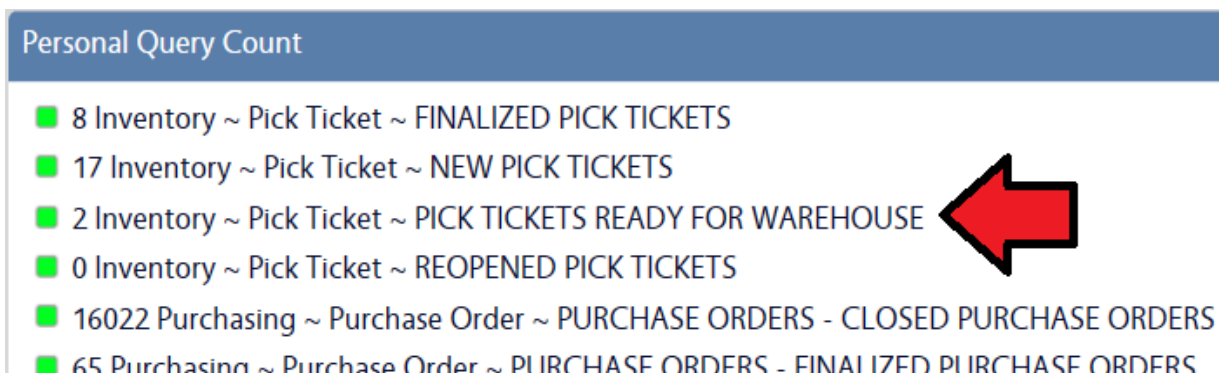
Click the “Save” button in the upper left-hand side of the screen and you’re done!



If you would like to email or print a copy of your pick ticket, click the “Email” or click the “Print” links under the “Action” box on the left-hand side of the screen and follow the prompts from there.



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.



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 representatives of Resource Management and we will be happy to assist you.

Contact	Office Phone	Email
Brandon Baker	(407) 823-4449	brandon.baker@ucf.edu
Cheryl Sanderson	(407) 823-2986	cheryl.sanderson@ucf.edu
George Rivera	(407) 823-3681	jorge.rivera@ucf.edu
Lance Watkins	(407) 823-4082	lance.watkins@ucf.edu