EXAMPLES NEEDED FOR TRAINING

Slide 5: Review how to access the Parts Search from the Navigator Screen, Work Order form and Issue Request form.

Slide 8: Review the Find Part form and it’s fields, buttons, etc.

Slide 10, 11, 12, 13: Do the part query exercises.

Slide 16: Review the Issue Request form and how to access it from the Navigator screen as well as from the Work Order form.

Slide 22: Do the exercise to create an Issue Request.

Slide 25: Cancel a line on the previously created Issue Request and then the entire request.

Slide 28: Review the Part Master form and how to look for parts in other warehouses if they are not available in your home warehouse.

Slide 32: Create another Issue Request for a part that is not available in their home warehouse.
SUBJECTS COVERED IN THIS UNIT:

- FM Parts Catalog ........................................ 4
- Accessing the Parts Catalog ......................... 5
- Find Part Form ............................................ 8
- Querying the Parts Catalog ............................ 10
- Introduction to Issue Requests ..................... 14
- Issue Request Form ...................................... 16
- Creating an Issue Request .............................. 22
- Canceling an Issue Request ............................ 25
- Parts Master Form ......................................... 28
- Ordering Parts from another Storeroom .. 32
The FM Stores Catalog is a list of FM stocked and unstocked parts that are ordered frequently.

- All parts are assigned a 6-digit part number.
- Parts are ordered by using a stock Issue Request or Purchase Request (PREQ) form.
- Parts can be queried by Part, Category, Manufacturer, Vendor, Manufacturer Part Number and some Vendor Part Numbers (Grainger and U-Stores).
ACCESSING THE STORES CATALOG

- Access the Stores Catalog from the Navigator screen by double clicking Part Search.
ACCESSING THE STORES CATALOG

- From the *Work Order* form, click the Parts tab
- Click the *Mat’l Catalog* button
ACCESSING THE STORES CATALOG

- From the *Issue Request* form
- Click the *Part Search...* button
FIND PART FORM

The image shows a screenshot of a software interface titled "Find Part". The interface includes options for filtering parts by Part, Category, Manufacturer, and Vendor. The screen displays a list of parts with columns for Warehouse, Status, On Hand, Reserved, On Order, Staged, Part Number, and Commodity. The parts listed include items such as "FITI REMOVAL/50 LB BAG/CORN Cob GRIT 50 LB BAG/SAND/BLASTSTR", "FITI REMOVAL/BLACK BEAUTY/COAL SLAG/100 LB BAG", and others.

The categories listed under the shorter description are "TOOLS & SHOP SUPPLIES / ABRASIVES / SANDBLASTER". The long description includes the following: "ABRASIVE, CORN COB GRIT 50 LB BAG, USED IN SANDBLASTER FOR GRAFFITI REMOVAL. THIS ITEM REPLACES FM PART #015403, MFG. GREEN PRODUCTS CO. STERLING SUPPLY PT#1420".
Reference Fields:

- **Warehouse**: Default is the user’s warehouse; click the LOV button to query other warehouses.
- **Status**: COMPASS will search for parts with this status. Click the LOV button to view other options.
- **Description**: Short description of the part.
- **On Hand**: Number of parts in stock at the selected warehouse.
- **Reserved**: Number of parts reserved and ready for pick up at the selected warehouse.
- **On Order**: Number of parts on order at the selected warehouse.
- **Staged**: Not being used by FM.
- **Part Number**: The 6 digit number assigned to the part.
- **Commodity**: Commodity number assigned to the part (another form of categorizing the parts).
- **Category**: The category assigned to the part, so it can be searched by category.
- **Long Description**: Long description of the part includes additional specification data.
- **By Part Tab**: Used for querying a part by description or COMPASS part number.
- **By Category Tab**: Used for querying a part by category or type of part.
- **By Manufacturer Tab**: Used for querying a part by the manufacturer name or manufacturer part number.
- **By Vendor Tab**: Used for querying a part by the vendor number or vendor part number.
**QUERY BY PART**

**EXERCISE 1**

1. Perform a query using %GLOVE% in the Description field
2. Click Count Hits icon to view the number of records found (134 records)
3. Click the Execute Query icon to view the detail of the records found
4. Click the Enter Query icon twice to repeat the query with the same selection criteria. Change the selection criteria if desired, and click the Execute Query icon again.
EXERCISE 2
1. Click PAINTS & FINISHES → PAINTS - LATEX → EXTERIOR
2. Query those parts for 5 GALLON in the Size field. Caution: Not all descriptors are consistent; i.e. GALLON, GAL, GA, GLN, G
3. There should be 3 records that meet the selection criteria
4. Click the minus (-) sign next to the PAINTS & FINISHES category to close the sub-categories
QUERY BY MANUFACTURER

EXERCISE 3
1. Click Mfr LOV button
2. Highlight DELTEC and click OK
3. Click the Find button and 9 records are retrieved
4. Enter K11E in the Mfr’s P/N field and click the Find button again. Caution: Mfr P/N’s are not available for many records.
EXERCISE 4
1. Click the Vendor field LOV button and query for %GRAINGER% in the Vendor Name field
2. Highlight the active vendor from the search results and click OK
3. Click the Find button to search for all parts associated with the selected vendor number
4. Query further on those results by querying %TORCH% in the Description field (18 records)
INTRODUCTION TO ISSUE REQUESTS

What is an Issue Request?

• Form used for routine orders of COMPASS stocked or non-stocked parts

• It reserves COMPASS parts if they are available or triggers the automatic ordering of parts (daily GENREQ) if they are not available

• DO NOT USE if you have an emergency or urgent need for a COMPASS part that is not in stock; In these instances, enter the COMPASS part number on the Purchase Requisition (PREQ) form.
INTRODUCTION TO ISSUE REQUESTS

Parts Definitions...

- **COMPASS Part**: A part that exists in the COMPASS online stores catalog.

- **Stocked COMPASS Part**: A COMPASS part with an assigned bin number and is usually in stock. It will have a Reorder Point (ROP) and Economic Order Quantity (EOQ) assigned.

- **Non-Stocked COMPASS Part (ORO)**: A COMPASS part that does not have a bin number assigned. A part number exists in the COMPASS online stores catalog, but they are ordered On Request Only (ORO) and not stocked.

- **Non-COMPASS Part**: A part that does not exist in the COMPASS online stores catalog because it is ordered infrequently. These parts are ordered using a *Purchase Requisition* (PREQ) form.
ISSUE REQUEST FORM
1. Access the Issue Request form from the Navigator screen.

Reference Fields:

- **ASSIGNED**: **ASSIGNED** is the default. MDOC number automatically generates when submitted or saved.
- **STATUS** Identifies current disposition of the entire Issue Request.
  - CREATING: The initial default status. If not ready to submit the order, save the record by pressing F10 and do not Submit. Return later and Cancel or Submit the order. This does not create a part reservation or an order.
  - AVAILABLE: All parts listed in the Material Detail section are available and have been reserved for the work order specified. Some parts could have a CANCELED status.
  - PARTIAL: This status indicates there are some parts that are either AVAILABLE, ISSUED, BACKORDERED or CANCELED in the Material Detail section.
  - BACKORDER: If all parts are BACKORDERED in the Material Detail section. Some parts could have a CANCELED status.
  - ISSUED: All parts listed in the Material Detail section have been issued to the work order specified. Some parts could have a CANCELED status.
  - CANCELED: All parts defined in the Material Detail section have been CANCELED for the work order specified.
  - SUBMITTED: A temporary status that displays when you have pressed the Submit button and the system is still processing the request.
ISSUE REQUEST FORM

2. MDOC No. **ASSIGN**
3. Warehouse ZNI
5. Instruction DELIVER TO: RCOM 3-110 MCOS TOWER
6. Material Detail
   Part Number: 040436
   Description: MOTOR HI-EFFICY, PERM SPLIT CAP/1/4-1625/115/2.7/CW-C
2. The default warehouse of the person logged in is automatically entered. Change the warehouse number if ordering from another storeroom.

3. Enter the work order number for which the parts are ordered. Click the LOV button to query for the work order number if it’s not available. If parts have been ordered against the work order before, the help message appears; click **OK** to proceed.

4. As an FYI, enter the date when you would like to pick up the parts.

5. Enter special forwarding instructions to storeroom; these notes are printed on both the Issue Request Report as well as the Receipt Notice. Include Name and contact for person who actually needs the item.

6. Enter the part number or utilize part number look up features on the bottom of the screen. Tab out of the part number field and a help message will appear if the part was ordered previously against this work order; click **OK** to continue with the order.

   - **WO Parts List...**: Provides for a selection of parts from a list of predefined parts set up for the specific work order.
   - **Bills of Mat’l...**: Provides for a selection parts from a predefined list of parts set up for the specific equipment (e.g. parts used for an equipment overhaul or rebuild).
   - **Part Search...**: Opens the *Find Part* form, and automatically transfers selected parts back to the *Issue Request* form.

**Reference Fields:**

- **Stage Location**: Not currently being used by FM.
- **Stage Parts?**: Not currently being used by FM.
ISSUE REQUEST FORM
7. Enter quantity of parts needed and press tab. COMPASS checks quantity against stock in the selected warehouse and gives a help message if the part is not in stock. Decide whether or not to proceed with the order. Alternatives are:
   • Change warehouse and order from a different storeroom if they have it in stock.
   • Cancel request and create a Purchase Requisition (PREQ) if this is a rush order.
   • Proceed with order and wait for the backorder to arrive.
8. Click the **Submit** button when done ordering, and MDOC number is generated. The **Status** field for the part number and the header **Status** for the order are also auto-filled at this time. Simply closing the form will create an MD#, but leave it in the “Creating” status – remember to **SUBMIT**.

Reference Fields:

- **Requestor Name / Telephone**: Automatically defaults to sign in name and telephone number; these fields cannot be changed.
- **Dates...**: This button gives the dates and by whom the Issue Request was entered, modified, and closed.
- **Part Description**: Is auto-filled from the part record data.
- **Status**: The part status is auto-filled after Issue Request is submitted.
- **MSDS checkbox**: Not currently being used by FM.
- **U/M**: Unit of measure is auto-filled from the part record data.
- **Amount**: Amount is automatically calculated and auto-filled.
CREATE AN ISSUE REQUEST

EXERCISE 5
1. Access the Issue Request form from the Navigator screen
2. Enter a work order number you created in U113 General WO Processing in the WO Number field
3. Enter TOM in the Pick Up Date field (this will insert tomorrow’s date)
CREATE AN ISSUE REQUEST

4. In the Instruction field enter a location (room #, building name) where the material will be delivered, contact name and telephone number.
5. Put cursor on the Part field and click the Part Search button.
6. Query for a MOTOR HI-EFF% and click the checkbox next to three different motor part numbers.
7. Click OK and you will be returned to the Issue Request form. The part numbers, descriptions, and U/Ms will auto-fill.
CREATE AN ISSUE REQUEST

8. In the **Quantity** field enter a quantity for each part number
9. If a help message appears, click **OK** to continue
10. Put your cursor on the third part number and click the **Erase** icon to remove it from the order
11. Click the **Submit** button to submit the order
CANCELING AN ISSUE REQUEST

**EXERCISE 6**

1. Put cursor on the second part number on the Issue Request we just submitted and press the **Cancel Request** button
2. Click **Yes** to confirm your decision
3. The other lines remain unchanged, as well as the header status
4. To cancel the entire request, click on one of the header fields and press the **Cancel Request** button.

5. Click **Yes** to confirm your decision.

6. All line **Status** fields and the header **Status** field will be automatically updated to CANCELED.
CANCELING AN ISSUE REQUEST

When canceling an Issue Request...

- If there is only one line on the Issue Request, the entire request will be canceled and the header status updated.

- Lines with a Status of BACKORDER, AVAILABLE, or PARTIAL should not be canceled. Contact your planner if there is a need to cancel an Issue Request.

- An Issue Request Report automatically prints in the storeroom which states *** This is a CANCELLATION, not a new request ****

- Depending on the timing of the cancellation, it is recommended that you contact the Purchasing Department to see if a PO was issued to the vendor. This could prevent the need to process a Return to Vendor transaction.

- An auto “Order Run” is performed each week day around 7-8 am.
If the part is not in stock in the selected warehouse, use the *Part Master* screen to view stock in other storerooms.

To access the *Part Master* screen, put your cursor on the Issue Request part number and click the **View** button, then click the **Locations** tab.
Intentionally Blank Slide
# PART MASTER FORM

![Part Master Form](image)

## Table Description

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<th>Warehouse</th>
<th>On Hand</th>
<th>On Req</th>
<th>On Order</th>
<th>ROPLead</th>
<th>Unit Price</th>
<th>Selling Price</th>
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</tr>
</tbody>
</table>

Total: 31

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U211 Stores Catalog and Issue Request Ver 3
Reference Tabs:

- **Part**: Displays commodity code, status, part type, unit of measure, categories and long description of selected part number.
- **Locations**: Displays On Hand, On Requisition, On Order, ROP, Lead Days, Unit Price and Selling Price for selected part number in all FM storerooms.
- **Manufacturers**: Displays manufacturers of the part and the manufacturer’s part number.
- **Vendors**: Displays the Vendors who provide this part; last ordered date, last price paid.
- **On Order**: Displays any open Purchase Requisitions and Purchase Orders for this part.
- **Requests**: Displays any open Issue Requests for this part for all storerooms.
EXERCISE 7

1. Put your cursor in one of the header fields of the Issue Request form and click the insert icon to bring up a new Issue Request form.
2. In the WO Number field enter a WO number from one of the exercises in U113 General WO Processing.
3. Enter today’s date in the Pick Up Date field (hint: enter TOD).
4. In the Instruction field enter I WILL PICK UP FROM ZONE STOREROOM.
ORDERING PARTS FROM ANOTHER STOREROOM

5. Enter part number 032130
6. Enter 1 in the **Quantity** field and click **OK** when the help message appears
7. Put your cursor on the part number and click the **View** button
8. When the **Part Master** form appears, click the Locations tab
9. Find a Warehouse location where there is a quantity On Hand and close the **Part Master** form
10. Change the **Warehouse** to ZN4 and press tab until you pass through the quantity of the part number

11. Click the **Submit** button; notice the **Status** of the part is AVAILABLE

12. Contact the storeroom that you ordered the part from to let them know when you will arrive to pick up the parts
The End!!!

😊