FACILITIES MANAGEMENT
210 Materials

U218: Material Documents Search
EXAMPLES NEEDED FOR TRAINING

Slide 6: Review how to query up a MDOC by using the predetermined fields for selection criteria and pressing the find button. Wild cards are not allowed.

Slide 10: Review how to duplicate a request using W001262195 as the example, make sure it has a status of OPEN before the class begins.

Slide 12: Make sure W001262195 is OPEN so it’s Issue Requests can be duplicated in the exercise.
U218 MATERIAL DOCUMENTS SEARCH

SUBJECTS COVERED IN THIS UNIT

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INTRODUCTION

When should Material Documents Search be used?

- When the Issue Request number (MDOC) is unknown
- To duplicate an existing Issue Request
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MATERIAL DOCUMENTS FORM

1. Click on the 'Material Documents Search' option.
2. Enter the required information in the search fields.
3. Click on the 'Find' button to search.
4. View the search results in the Material Documents table.
MATERIAL DOCUMENTS FORM

1. Access Material Documents Search from the Navigator screen.
2. Using any or all of the fields in the header section of the form, enter your search criteria using the LOV button if necessary. You cannot use wildcards to perform this search.
3. Press the **Find** button after entering selection criteria.
4. MDOC numbers are sorted in descending order by the enter date.

Reference Fields:

- **MDOC No.**: The Issue Request “MD” number, which was assigned when the Issue Request was created.
- **Date**: Date the Issue Request was created.
- **WO Number**: Work Order number from the Issue Request.
- **Description**: Description of the work order.
- **Equipment**: Equipment number from the work order.
- **Amount**: Total amount, in dollars, charged against this Issue Request.
- **Total**: Sum of the Amount field.
Right click the WO number to access drill down menu options.
MATERIAL DOCUMENTS FORM

Reference Buttons:

• View button: Click to view the Issue Request details. From the Issue Request form, you can right mouse click the work order number and choose a function to perform against the work order from the drill down menu (view/edit, quick schedule, close, cost summary, print).
• Duplicate button: To duplicate an existing Issue Request.
DUPLICATING ISSUE REQUESTS

- Perform a Material Document search
- Locate the MDOC you wish to duplicate and put your cursor anywhere on this line
- Press the **Duplicate** button
- A series of warning pop-up windows may appear; click OK for each one that appears

ONLY MDOCs WITH ACTIVE WOs CAN BE DUPLICATED
A new Issue Request form is launched
The work order number and part number(s) are auto-filled; you may add or change part numbers or the work order number if so desired
Complete the Issue Request and click the Submit button
EXERCISE 1

- From the *Material Documents* form, query W001262195 and duplicate one of the MDOCs
- Change the quantities of the parts that were duplicated
- Add a few more new parts to the Issue Request and then Submit the request
- Query up your newly created MDOC using the *Requested by* field on the *Material Documents* form
The End!!!

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