FACILITIES MANAGEMENT
330 PARTS RECORD MAINTENANCE

U331: Creating Part Records
EXAMPLES NEEDED FOR TRAINING

**In this training file, have a Part Data Form filled out and ready for the students to create a new part record***

Slide 7: Access the Part Data form on Web Reporting and show the students how to run a blank report and a report using a similar COMPASS part record.

Slide 8: Walk through the process of changing the Default Warehouse

Slide 11: Walk through the process of inserting and copying the similar record

Slide 12: Walk through the entire process of creating the new part record.

Slide 17: Review the importance of notifying people of the existence of a new part in the system.

Slide 18: Query up part records with a Status of OBSOLETE and DEPLETE so they can see what they look like and the notes that have been added to the record.
SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

- COMPASS part records consist of stocked and unstocked parts
  
  - All COMPASS parts, whether stocked or unstocked, are given a unique 6-digit part number
  
  - The decision to stock or not stock a part depends on the demand, criticality of a part, lead time required to receive a part, cost, and shelf-life
  
  - An on-line parts catalog makes it easier to find and order frequently used parts
CRITERIA FOR ENTERING NEW PART RECORDS

A part should meet one or more of the following criteria for entry into COMPASS:

- Part record is part of an organizational wide program that is critical to the success of operations. Examples include the Paint and Carpet Program, Custodial Uniform Program, etc.
- Part will be used in Bills of Material, especially for a piece of equipment.
- Part is used to replace an obsolete part.
- Part will be ordered 1 or more times a year, FM wide.
- If this part is a custodial cleaner or chemical, it has been approved by the Material Review Board.
- If this part is a non-custodial cleaner or chemical, it has been approved by the FM Safety Department. FM Safety will ensure the proper distribution of MSDS sheets.
CRITERIA FOR ENTERING NEW PART RECORDS

Orders for "stock" parts circumvent approval hierarchies, thus orders for these goods are automatically approved for purchase. With this in mind, please follow these rules about part price:

<table>
<thead>
<tr>
<th>UNIT PRICE</th>
<th>APPROVAL NEEDED FOR ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $2,500</td>
<td>No approval required</td>
</tr>
</tbody>
</table>
| $2,500 and greater    | **Part Requested by District** – Present to District Director monthly meeting for approval  
|                       | **Part Requested by Other Business Units** – Obtain approval from appropriate Business Manager |
1. Access the Part Data form from the FM Web Reporting website at http://www.facm.umn.edu/bas/
2. Enter the most similar part number that exists in COMPASS or select NO SIMILAR PART for a blank form.
3. If you want instructions for the form, choose YES.
4. Then click **OK** to run the form and then print it.
If you selected a similar part record, cross out the old data that doesn’t pertain and write in the new data for the new part. Call the vendor who will supply the part to get the additional data you need.
6. Access the *User Profile* form from the Navigator screen
7. Change your **Default Site** and **Default Warehouse** to match that of the person requesting the new part and click the **OK** button
8. Access the *Part* form from the Navigator screen
9. Query up a similar part
10. Insert a new part record and copy the similar part data by pressing the F6 and then the F4 key
11. Check and change the **Unit of Measure** if necessary (this cannot be changed later)

12. Then before doing anything else, click the **Multi-Warehouse** button to select the warehouses to assign

13. Click the **Add**? **Checkbox** next to each warehouse and click the **OK** button

14. Then click the **Save/Commit** icon or press the **F10** key to assign a part number
15. Using the *Part Data* form that was filled out, edit the part *Short Description* and *Long Description* in COMPASS. It's important to follow the format of the similar record, so the part will be sorted in the same manner as the other parts in the database.

16. Click the *Details* button to enter the part details (each COMPASS part has its own set of default details), then press the *OK* button.
17. Click the **Bins** button and enter ORO (on request only) for the time being, then close the window. The Stores Clerk will enter a bin number, reorder points and quantities if the part will be stocked. This will be decided using the criteria at the beginning of this lesson.

18. Click the **Vendors** button and leave the **Warehouse** field blank, enter the **Vendor No**, the **Vendor Name** auto-fills, **Vendor Part Number**, **Rank (should be 1)**, **Lead Days** (working days), **UOP**, **Unit Price**, and then click the **OK** button.
19. Click the **Mfrs** button to enter **Manufacturer** (press the **F9** key for LOV), **Brand**, **Manufacturer’s Part Number**, and **Rank** (use 1). Check the **sub checkbox** if substitutions are permitted and leave it unchecked if substitutions are not permitted. Click the **OK** button when finished.
20. If substitutions are permitted, click the **Substitutions** button to add the substitute part data.

21. With the cursor in the **Sub Part No.** field, press the **F9** key to query COMPASS for a substitute part number.

22. Click the checkbox next to the part and then click the **OK** button.

23. Tab over to the **Sub Type** field and press the **F9** key and choose between **FULL** and **PARTIAL**.

Click the **OK** button when done, then close the **Substitutions** form.
24. Notify Purchasing of all new part records that have been added to COMPASS
25. Notify all Planner/Schedulers in each District and the Central Planner group of the new part record
26. Contact Charlie Erickson at 626-7773 with questions
Part order history is reviewed periodically by the Stores Clerks and the Purchasing Agents to determine if a part should be kept in stock.

Vendor may contact the Stores Clerk or Purchasing Agent to advise them that the part is no longer available.

Part records are never deleted; instead, the part status is changed to DEPLETE or OBSOLETE by the Stores Clerk.
A part should meet one or more of the following criteria for before making the part obsolete in COMPASS:

- Manufacturer no longer produces the part
- Vendor no longer supplies the part
- Part is not in a Bills of Material for an active piece of equipment
- No orders for this part in the past 3 years and part is not necessary to meet critical FLS or other emergency situation requirements
- If this is a custodial cleaner or chemical, this action has been approved by the Material Review Board
The End!!!