



UNIVERSITY OF CENTRAL FLORIDA

Central Stores: Ordering Non-Stock Parts

Version 3.0

This manual is a living document which will be updated regularly. Please check <https://fo.ucf.edu/the-aim-system-2/> for the latest version prior to use.

Josh Haupt • February 2, 2021 • Resource Management



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System Access

If you need to order merchandise through Central Stores, you will need access to the AiM CMMS System. For access to the AiM system, please visit the [Facilities Operations AiM page](#) and complete the requisite form. 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 Purchase Requisitions Within AiM

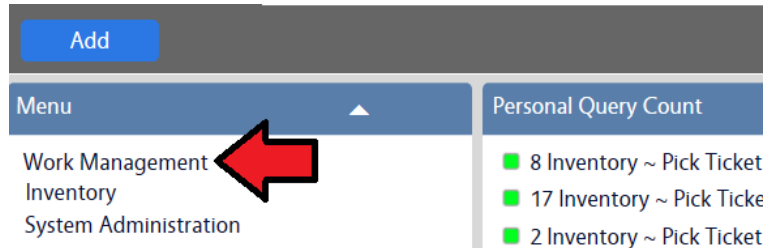
The AiM Suite by AssetWorks is Facilities and Safety’s Computerized Maintenance Management System (CMMS). It also acts as the inventory and purchasing management system for Central Stores. All items ordered through Central Stores, whether stock or non-stock, are requested, tracked, and billed through 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 **Purchase Requests** may be launched. If your shop is currently using the AiM system to manage your work orders, you can launch a **Purchase 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 **Purchase 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.

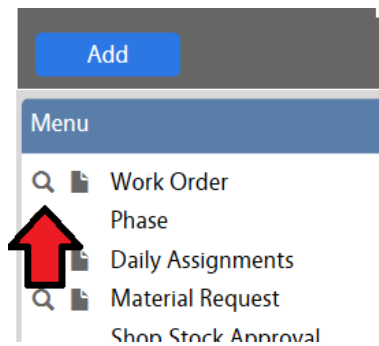
Starting a New Purchase Request

It does not matter in the AiM system which type of work order a **Purchase 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 **Purchase 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):

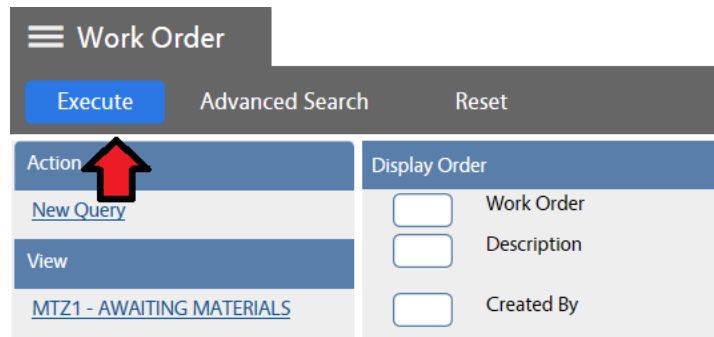


In the "Work Order" text box, enter either the work order that you are currently working on or enter your shop's **Annual Standing Shop Supplies Work Order**.

Display Order	Sort	Operator	
<input type="checkbox"/>	Work Order	-	=
<input type="checkbox"/>	Description	-	contains

10738331

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



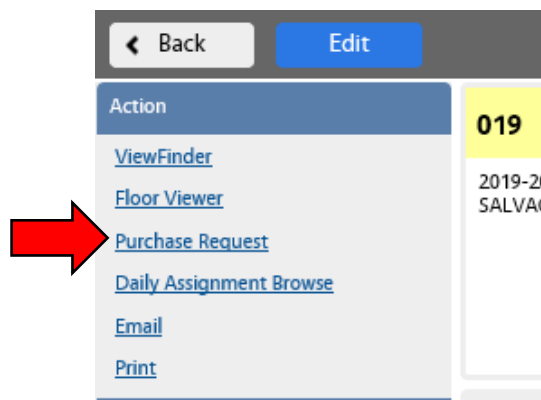
When your work order has been loaded, click the work order link on the left to enter the work order detail screen.

Work Order ↑	Description	Status	Type	Category
10738331	2019-2020 BLANKET WORK ORDER FOR SUPPLIES ORDERED FROM CENTRAL STORES BY MEMBERS OF THE RM SURPLUS AND SALVAGE TEAM	OPEN	ADMINISTRATIVE	MATERIALS

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)

The screenshot shows a mobile application interface for 'Phase'. At the top, there is a header with the text 'Phase'. Below the header is a table with the following columns: 'Phase', 'Description', 'Location (Room Number)', and 'Shop'. There is one row in the table with the following data: '019' (with a red arrow pointing to it), '2019-2020 BLANKET WORK ORDER FOR SUPPLIES ORDERED FROM CENTRAL STORES BY MEMBERS OF THE RM SURPLUS AND SALVAGE TEAM', '0100', and 'RM SURPLUS'.

After you’ve entered the Phase detail screen, look for the “Purchase Request” link on the left-hand side of the screen under the “Action” box.



Click the link to launch a new **Purchase Request**. When the new **Purchase 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”.

The screenshot shows the top portion of a web form. At the top left, there are two buttons: a green "Save" button and a grey "Cancel" button. Below these is a "View" menu with options: "Extra Description", "Notes Log", "User Defined Fields", and "Status History". To the right of the menu, the number "111574" is displayed in a yellow box, with "Last Edited" text to its right. Below this is a large text input field containing the text "We need a new wheel for our forklift". A red arrow points to this text field.

Verify that the work order information is correct in the Work Order box.

The screenshot shows a section of the form titled "Work Order". It contains three rows of information: "Work Order" with the value "10738331", "Phase" with the value "019", and "Shop" with the value "RM SURPLUS". Below the "Shop" value, there is additional text: "RESOURCE MANAGEMENT SURPLUS &". Each input field has a search icon to its right.

Enter the “Requested By” name, the “Date Needed”, and the “Deliver To” under the “Requestor” box:

The screenshot shows a section of the form titled "Requestor". It contains five rows of information: "Date Needed" with the value "Jan 28, 2021 1:12 PM", "Requested By" with the value "JHAUPT", "Notify When" with the value "Do Not Notify", "Deliver To" with the value "CRAUSCH", and "Notify When" with the value "Do Not Notify". Each input field has a search icon to its right. To the right of the form, there is a vertical sidebar with labels: "Unive", "Camp", "Buildi", "Locat", and "Numb".

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

The screenshot shows a form with four input fields, each with a search icon and a dropdown menu. The fields are: University (UCF), Campus/Location (MAIN CAMPUS), Building (0016E), and Location (Room Number) (0100). Below the form are two buttons: 'Remove' (red) and 'Add' (blue).

Adding Items to the Purchase Request

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

This is a close-up of the bottom right corner of the form from the previous image. It shows the 'Remove' (red) and 'Add' (blue) buttons. A large red arrow points down towards the 'Add' button.

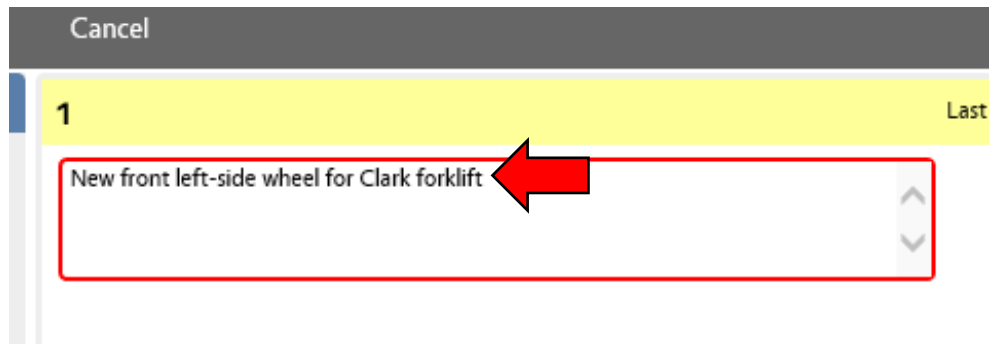
On the “Add New Line Item” screen, select “Add Non-Stock Part” then click the “Next” button on the upper left-hand side of the screen:

The screenshot shows a dialog box with a list of options. The 'Next' button is highlighted in blue. A red arrow points to the 'Next' button. Another red arrow points to the 'Add NonStock Part' option, which is selected with a radio button.

Please Select:

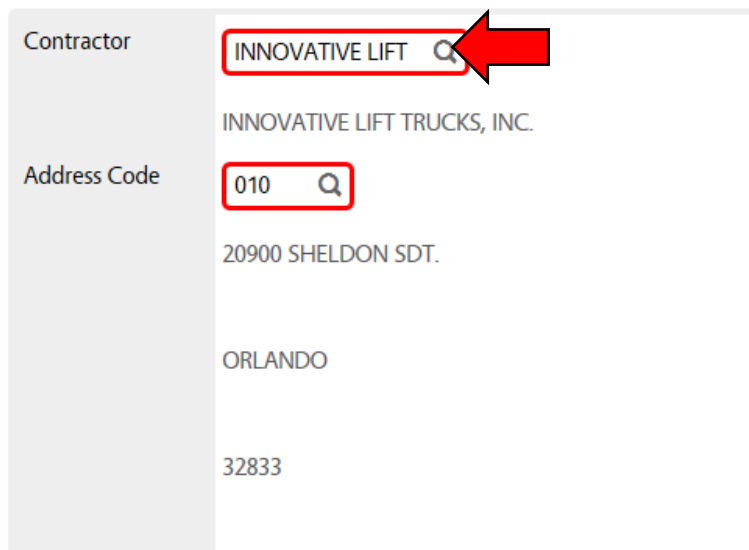
- Browse Catalogs
- Add Stock Part by Warehouse
- Add Catalog Part by Vendor
- Add Service
- Add NonStock Part
- Add Equipment Rental
- Add Inventory Kit

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



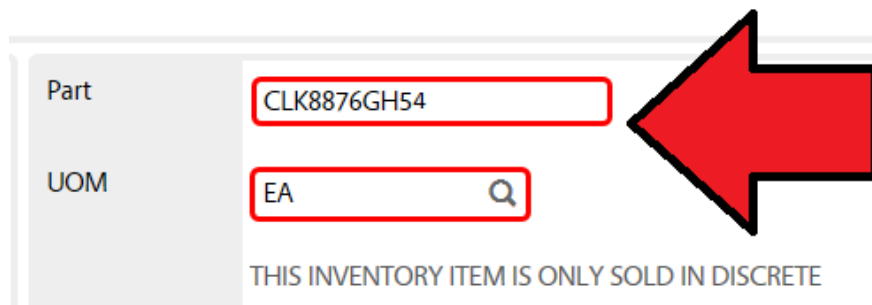
The screenshot shows a mobile application interface for a line item. At the top is a grey bar with the word "Cancel". Below it is a yellow header bar containing the number "1" on the left and the word "Last" on the right. A red rectangular box highlights a text input field containing the text "New front left-side wheel for Clark forklift". A red arrow points from the right side of this box towards the text.

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.





The screenshot shows a form with two main sections. The first section is labeled "Contractor" and has a search box containing "INNOVATIVE LIFT" with a magnifying glass icon. A red arrow points to this search box. Below the search box, the text "INNOVATIVE LIFT TRUCKS, INC." is displayed. The second section is labeled "Address Code" and has a search box containing "010" with a magnifying glass icon. Below this search box, the text "20900 SHELDON SDT.", "ORLANDO", and "32833" is displayed.

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



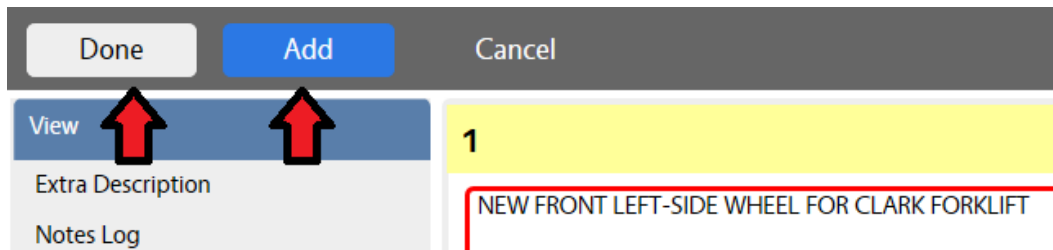
The screenshot shows a form with two main sections. The first section is labeled "Part" and has a text box containing "CLK8876GH54". The second section is labeled "UOM" and has a search box containing "EA" with a magnifying glass icon. A large red arrow points from the right side of the form towards the "Part" text box. Below the UOM search box, the text "THIS INVENTORY ITEM IS ONLY SOLD IN DISCRETE" is displayed.



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		50.00

NOTE: IF THE ACTUAL COST IS NOT KNOWN, ENTER AN ESTIMATE AND THE CENTRAL STORES BUYER WILL UPDATE THE PURCHASE 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:



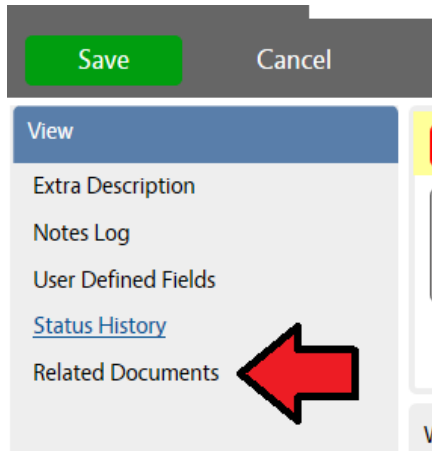
Done	Add	Cancel
View		
Extra Description		1
Notes Log		NEW FRONT LEFT-SIDE WHEEL FOR CLARK FORKLIFT

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.

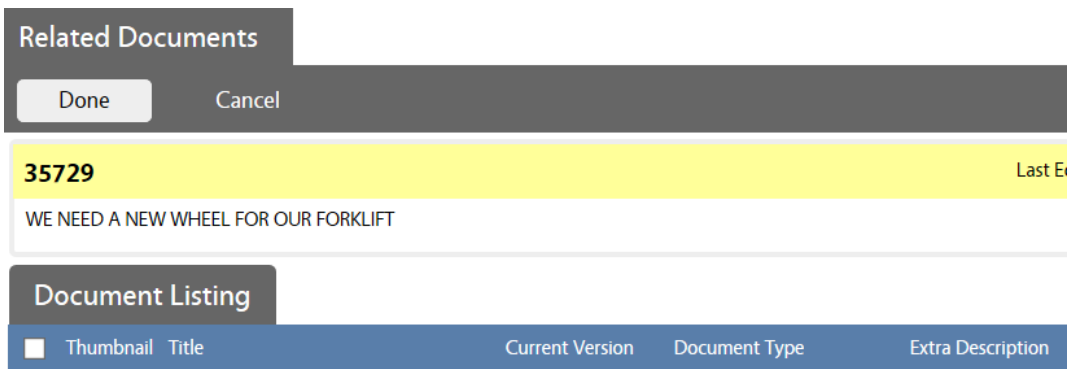
Adding Related Documents and/or Images to a Purchase Request

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 Purchase Request. You can do this by making use of the "Related Documents" feature.

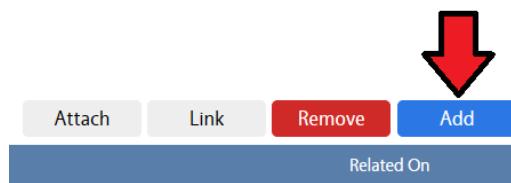
First, you will need to access the “Related Documents” screen by clicking on the “Related Documents” link on the left-hand side of the screen under the “View” menu box.



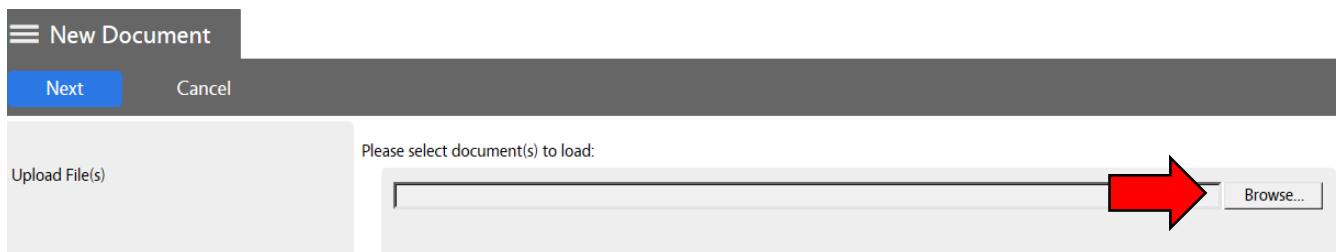
This will take you to the upload screen where you can add your files.



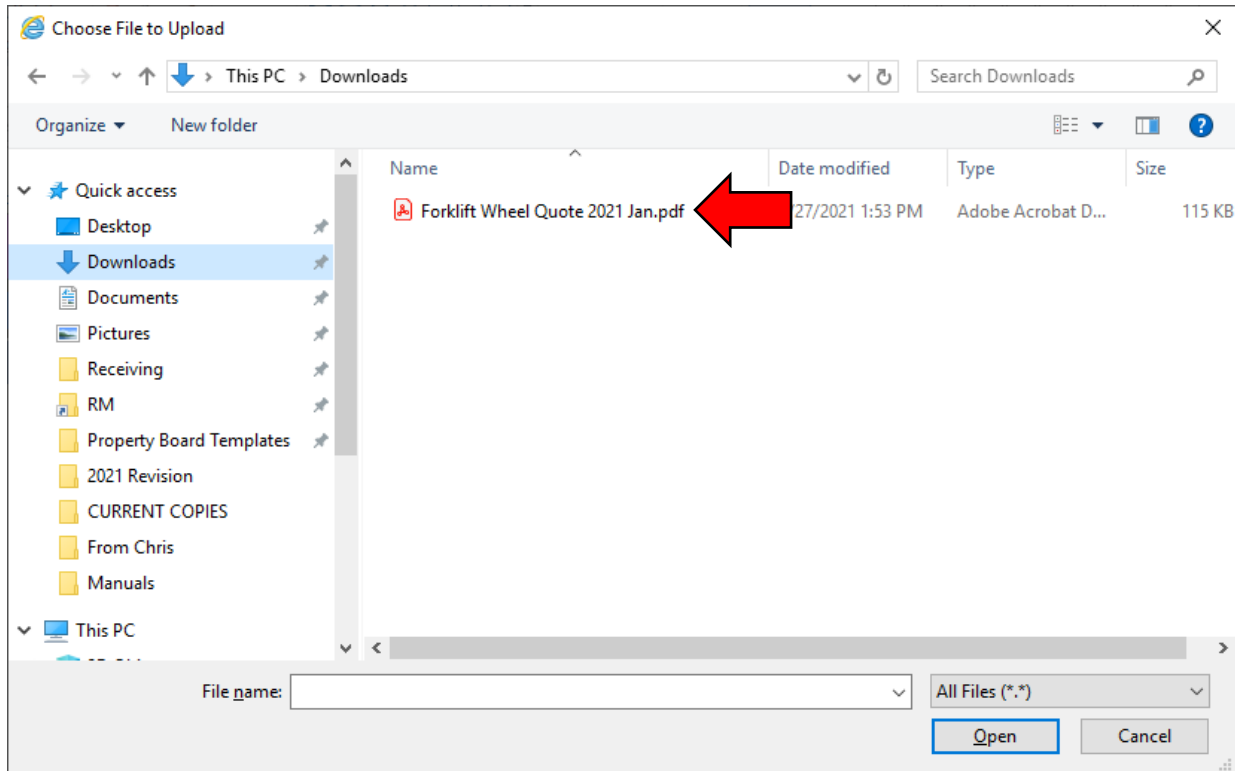
To add a new file to the system, click the “Add” button on the lower right-hand side of the screen. In this example, we are going to add a quote from the vendor to the Purchase Request.



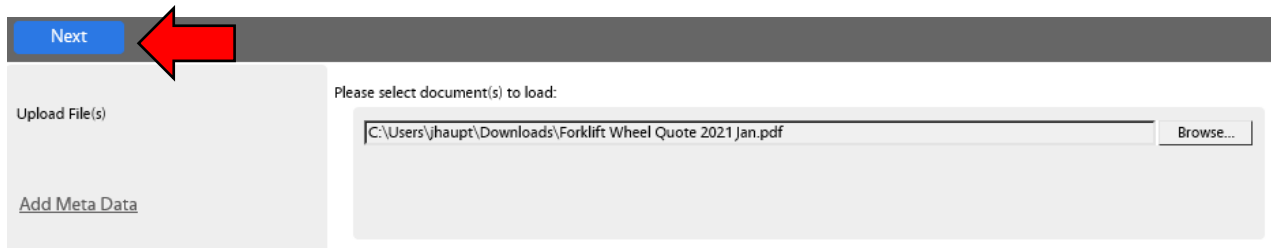
This will bring you to the second upload screen where you can browse for the document on your computer or on the network:



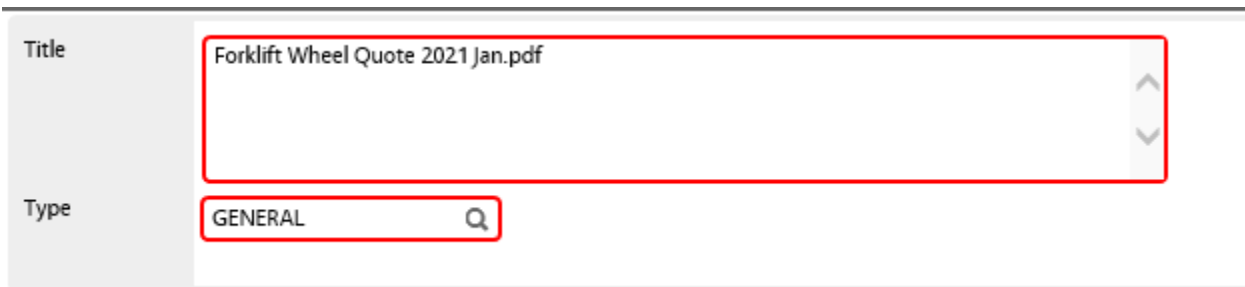
Use the browse button to locate your document, highlight it by clicking on the name of the file once, then click on the “Open” button on the lower right-hand corner of the popup dialogue box:



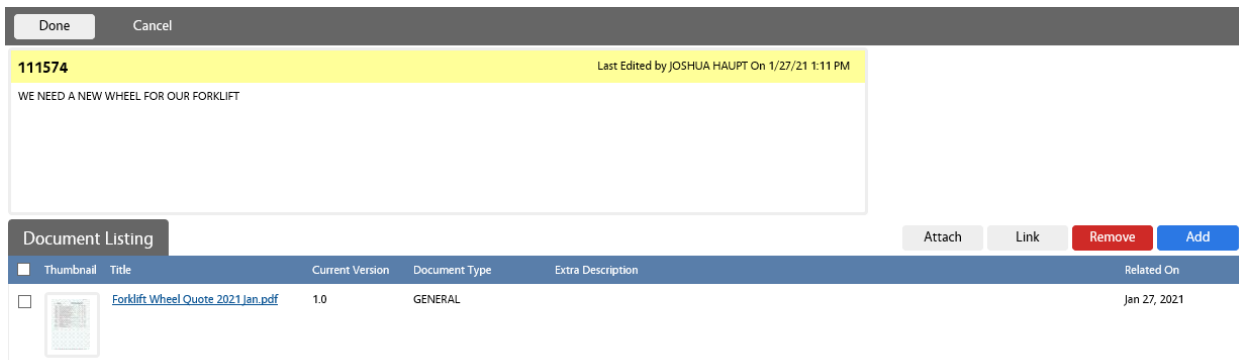
When the document location string has been updated to the New Document screen, click the “Next” button in the upper left-hand corner of the screen.



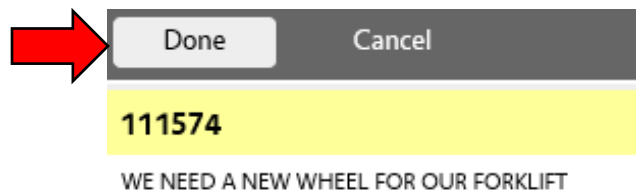
You will need to enter a description for your document and select the document type. For most non-stock orders, your document type will be either “GENERAL” or “IMAGE”.



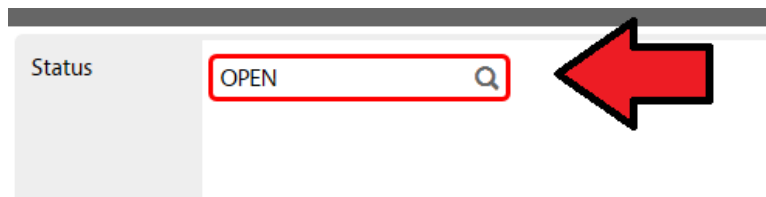
Select the document type by clicking on the name. After you have selected the document type and have entered a description, click the “Next” button three times to move past the current screen, the Attributes screen, and the Permissions screen. This will bring you back to the main Related Documents screen.

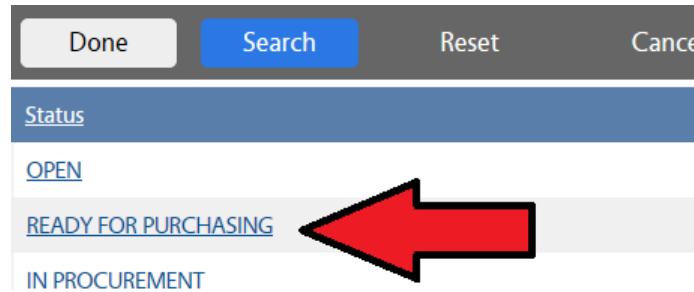


If you need to attach additional documents to your Purchase Request, simply repeat the steps above until they have all been loaded. If you are finished adding documents, click on the “Done” button from the Related Documents screen to return to the main Purchase Request screen.

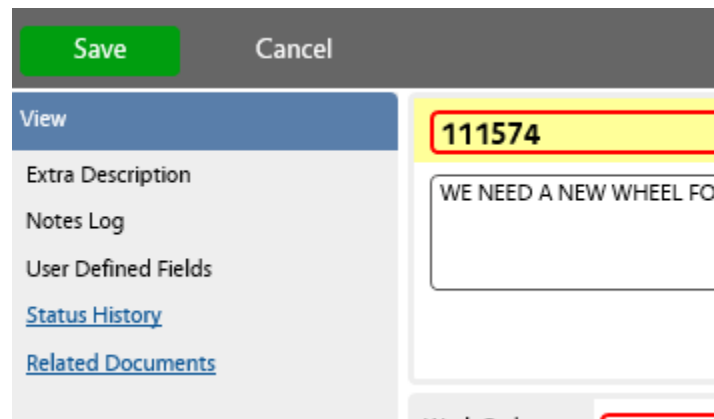


After you have completed adding items to the order and all related documents have been loaded (if applicable), you have a choice whether you want to leave the **Purchase Request** in “Open” status or change it to “Ready for Purchasing” status. If you would like to come back to this request to make changes 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:





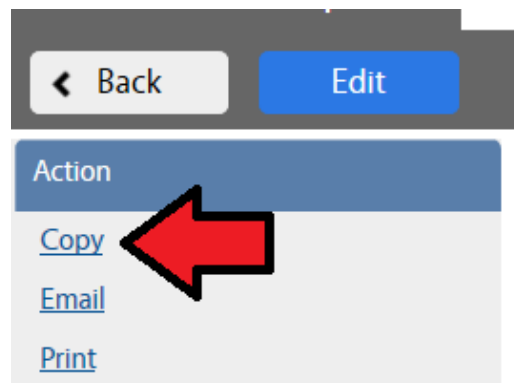
After you have changed the status of the Purchase Request to “Ready for Purchasing”, click the “Save” button in the upper left-hand corner of the screen to send the request to the buyers.



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 **Purchase 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.

TIP: Be sure to always double check the status of the purchase request after everything is done, Central stores only sees requests in “Ready for Purchasing”.

If you are making repetitive purchases charged to different work order phases, it is recommended that you use the “Copy” function from the main Purchase 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.

Checking the Status of Your Order

When a buyer in Central Stores has taken responsibility for your order, they will change the status of your **Purchase 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 **Purchase Request** and look at the “Editor” box on the main screen. The buyer’s name will be displayed.

111575	Last Edited by JOSHUA HAUPT On 1/27/21 2:12 PM	Status	IN PROCUREMENT
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 Purchase Request from “In Procurement” to “Finalized”.

When your requested items arrive at the warehouse

At this time the buyer will take the following action:

For Purchase 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 Purchase 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.

TIP: Non-stock and stock items may be ordered from the same Purchase 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 Purchase Requests for each.

Central Stores Contact Information

If you have additional questions, please contact one of the [team members](#).