

Purchase Request
(Formerly Material Request)

AiM

2016

Need help: call IMS 862-3388 <https://sscaimapp.assetworks.com/fmax>

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Purchase Request

- Purchase requests (formerly Material Request) must be created anytime there will be an external charge to a work order.
 - Material from the warehouse
 - Material purchased by the warehouse
 - Material purchased in an emergency situation
 - Contracted services
 - Equipment Rental
- Technicians can request parts from the warehouse through the FiRE app. *(Still Material Request in app)*
 - Only use #01 if unable to find the part in the warehouse list.
- Supervisors submit material requests for contracted services and equipment rental
- Contracted Service Process
 - Supervisor contacts contractor
 - Request a quote unless an emergency.
 - Quote will be attached to material request.
 - No tax should be charged
 - Purchase Request is promoted to a Purchase Order
 - Purchase Order verifies budget
 - Warehouse saves PO in Service Ordered (appears in query on Supervisor WorkDesk)
 - Supervisor gives Notice to Proceed to contractor
 - Once work is complete, Supervisor changes PO status to Service Complete

The screenshot displays the AIM Purchase Request interface. The main header shows 'AIM Purchase Request' and 'ANNA About Logout'. The interface includes a navigation menu on the left with options like 'New', 'Search', 'Browse', 'Action', 'Copy', 'Email', 'Print', 'View', 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', 'Send Email', and 'Related Documents'. The main content area shows details for a purchase request with ID '100009', last edited by 'BRITTNEY SCANLIN' on '06/09/2016 03:27 PM'. The status is 'FULLY RECEIVED' and the total amount is '\$57.96'. The request is associated with work order '166606-252026', requested by '725509 HAROLD FLORES', and is for 'MAINTENANCE' at 'HENSEL PARK TELECOM'. The 'Line Items' table at the bottom shows one item: a stock item with line type '#01', description 'BUSSMINN KIT 15, 600 VAC FAST ACTING FUSES', UOM 'EA', quantity '4.0000', unit cost '\$0.0000', and subtotal '\$0.00'. The status of the line item is 'Closed'.

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	Subtotal	Status
1	Stock	#01	BUSSMINN KIT 15, 600 VAC FAST ACTING FUSES	EA	4.0000	\$0.0000	\$0.00	Closed

Order Material

AiM Phase

Edit Search Browse

Action

ViewFinder

Timecard

Purchase Request

Daily Assignment Browse

Email

Print

View

001

(2X) RM 114

Shop

Start at the Phase. DO NOT click EDIT. Click Purchase Request. This will default the WO information on the Purchase Request.

Save Cancel

View

65692 Last Edited by ROLETEST On 06/16/2016 03:59 PM

Status NEW

Total \$0.00

Work Order 160613-166130 SR Jennifer Smith, 111-1111, js@mail.com

Requested By 708116 ANNA BARWICK

Phase 001 SR FAS SYSTEM 979-845-4311 RM 312.&

Date Needed Jun 16, 2016 04:11 PM

Shop MAINTENANCE MAINTENANCE

Deliver To 708116 ANNA BARWICK

Region 02 TEXAS A&M UNIVERSITY - COLLEGE STATION

Facility B1 WEST CAMPUS

Property 1504 REYNOLDS MEDICAL SCIENCES BUILDING

Location 208A CONFERENCE ROOM

Line Items

Line Line Type Part/Equipment Description UOM Quantity Unit Cost Subtotal Status

3 Remove Add

1. Title Block
 - a. Purchase Request # is auto-generated. Do Not change it.
 - b. The description field is optional. Once saved, it will show the Shop that is listed on the submitter's User Profile. Warehouse will sometimes add information here.
2. Requestor Block - *Required*
 - a. Requested By – Employee number of the technician requesting the material.
 - b. Date Needed – Date the material needs to be delivered or picked up
 - c. Deliver To - Employee number of the technician requesting the material
3. Add Line Item
 - a. Click **Add** to enter the Line Items

AiM Add New Line Item

Next Cancel

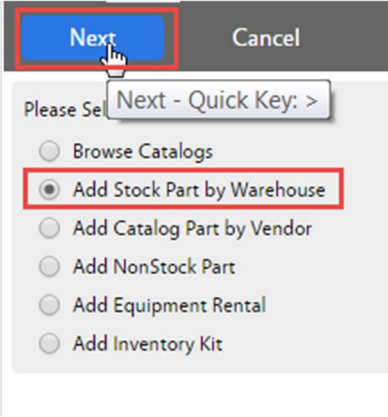
Please Select:

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

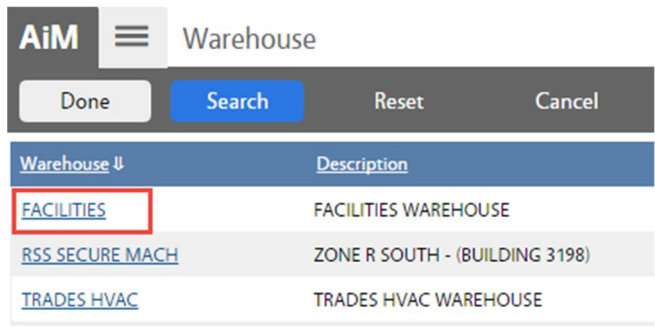
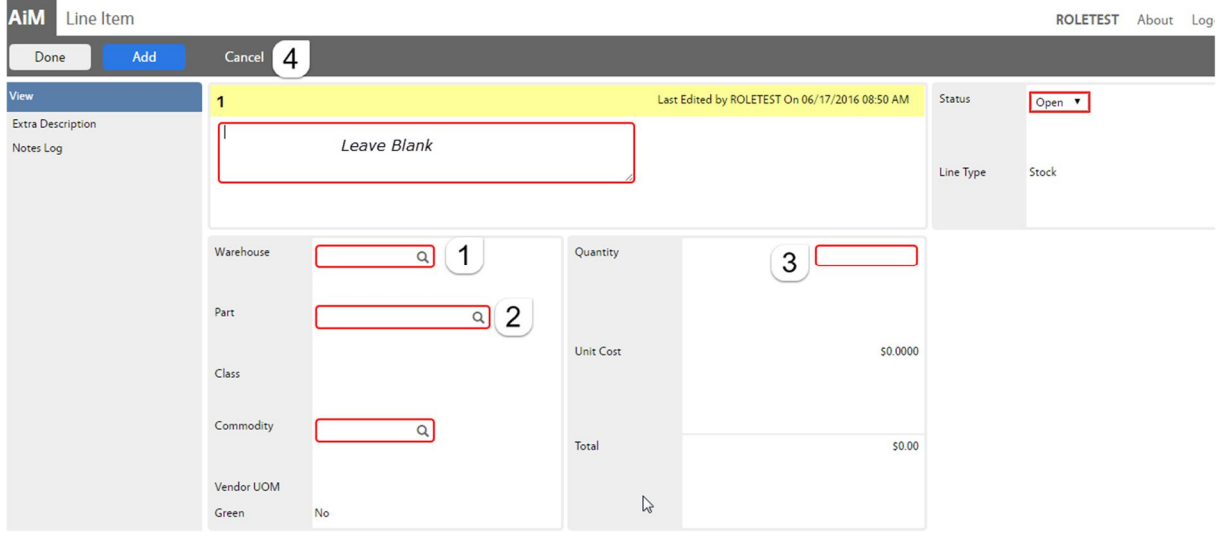
***If unsure if item is inventory, search on the Inventory Part Screen.*

4. Choose the type of line item to be added
 - a. *Add Stock Part by Warehouse* – items kept in inventory
 - b. *Add Catalog Part by Vendor* – item listed in a vendor catalog in AiM
 - c. *Add NonStock Part* – item that needs to be purchased
5. Click **Next**

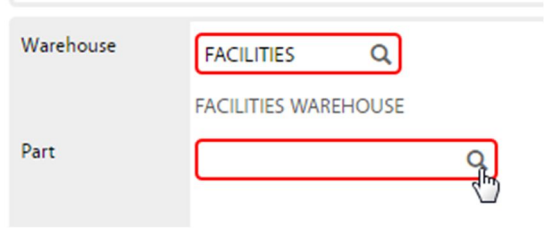
Add Line Item - Add Stock Part by Warehouse



- Choose *Add Stock Part by Warehouse*
- Click **Next**



1. Choose a Warehouse
 - a. Click on the name of the warehouse.
 - i. Facilities – Main warehouse
 - ii. RSS Secure Mach – Res Life vending machines
 - iii. Trades HVAC – HVAC shop use



2. Choose a Part by clicking on the magnify glass next to Part

AiM Inventory Part Profile

Execute Reset

Operator

Part =

Description contains screw

Class =

Done Search Cancel

Part #	Description
#10FW	FLAT WASHER, SAE, STEEL, ZINC FINISH, FITS BOLT SIZES #11 FOR USE WITH SCREW AND BOLTS, MEETS/EXCEEDS ANSI E
#10PWA	CONICAL SCREW ANCHOR, PLASTIC, USE WITH #10 SCREW
#12FW	FLAT WASHER, SAE, STEEL, ZINC FINISH, FITS BOLT SIZES #1: FOR USE WITH SCREW AND BOLTS, MEETS/EXCEEDS ANSI E

1 Last Edited by ROLETEST On 06/17/2016 09:17 AM

CONICAL SCREW ANCHOR, PLASTIC, USE WITH #10 SCREWS, PACKAGE 100

Warehouse: FACILITIES

Part: #10PWA

Class: HARDWARE

Commodity: FASTNERS

Vendor UOM: PK

Green: No

Quantity	
Unit Cost	\$2,7600
Total	50.00

- a. Enter criteria for the part
- b. Click **Execute**
- c. Click on the part needed

The Line Item screen will reappear. The following fields will populate based on the part selected. –

- Description
- Part
- Class
- Commodity
- Vendor UOM
- Green
- Unit Cost

AiM Line Item

Done Add Cancel

View

Extra Description

Notes Log

1 Last Edited by ROLETEST On 06/17/2016 09:17 AM

CONICAL SCREW ANCHOR, PLASTIC, USE WITH #10 SCREWS, PACKAGE 100

Warehouse: FACILITIES

Part: #10PWA

Quantity: 5

Done Add Cancel

Extra Description

3. Enter the Quantity needed

4. Choose a command.

- a. **Done** - Saves the line item and returns to the Purchase Request screen
- b. **Add** – Add another line item
- c. **Cancel** – Cancel this line item

Add Line Item - Add Catalog Part by Vendor

AiM Add New Line Item

Next Cancel

Please Select:

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

***Parts are added to the Vendor Catalogs as purchased.*

- Choose *Add Catalog Part by Vendor*
- Click **Next**

AiM Line Item ROLETEST About Logout

Done **Add** Cancel

View **2** Last Edited by ROLETEST On 06/17/2016 09:47 AM Status **Open**

Extra Description
Notes Log

Line Type Catalog

Contractor **1** Vendor Part

Address Code UOM

Green No
Class
Commodity

Quantity

Unit Cost

Total \$0.00

Contractor **1**

Address Code

1. Choose a Contractor
 - a. Click the magnify glass
 - b. The list of contractors will appear
 - c. Click **Search**.

AiM Contractor

Done **Search** Cancel

Contractor ↓	Description
1010862686	TRASHCANS UNLIMITED
1010905986	SIMBA INDUSTRIES

AiM Contractor

Execute Reset

Execute - Quick Key: E

Contractor []

Description contains granger

Services

Operator

Type = []

- d. Enter the name of the contractor in the Description field
- e. Click **Execute**
- f. Click the contractor's number

AiM Contractor

Done Search Cancel

Contractor ↓	Description
1361150280	GRAINGER INC

2 Last Edited by ROLETEST On 06/17/2016 09:47 AM Status Open

Line Type Catalog

Contractor 1361150280 Vendor Part [] Quantity []

GRAINGER INC

Address Code 000

ACCOUNTS PAYABLE DEPT MW- PALATINE

60038-0001

UOM Green No

Class

Commodity

Unit Cost

Total 50.00

- 2. Choose Vendor Part
 - a. Click magnify glass
 - b. Click **Search**

AiM Vendor Part

Done Search Cancel

Vendor Part ↓	Description
041493800	GE MODEL#5KCP29FK393885 1/10HP 115V 770RPM MCQUA
08500/558-935	TECMATE PRO SERVICE TOOL
10A990	DIAGONAL CUTTER,7-1/8 IN. L,13/16",MFR. MODEL # D228-7
10C458	CARTRIDGE ASSEMBLY, HOT, CERAMIC
10C459	CARTRIDGE ASSEMBLY, COLD, CERAMIC

- c. Enter the part in Description
- d. Click **Execute**

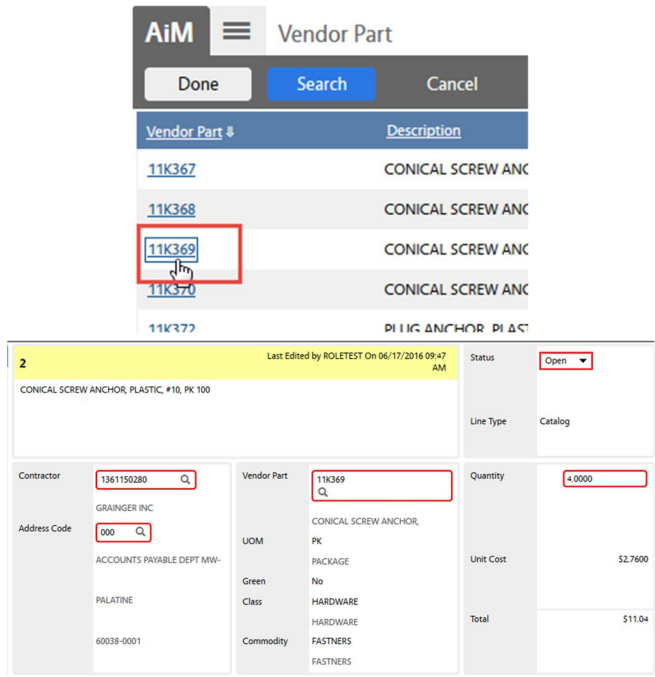
AiM Vendor Part

Execute Reset

Operator

Vendor Part = []

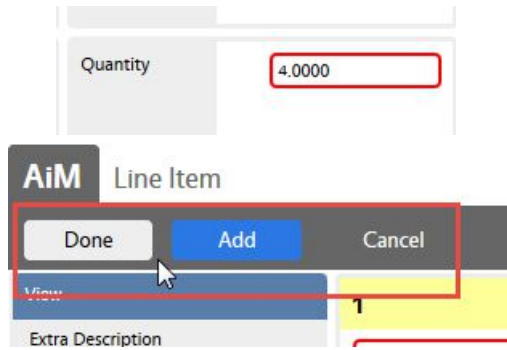
Description contains screw



- e. Click on the number for the needed part
- f. Cancel – Cancel this line item

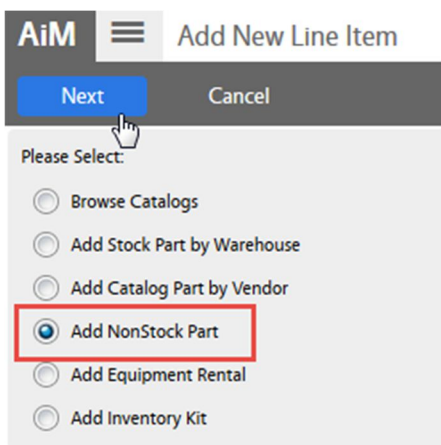
The Line Item screen will reappear.
The following fields will populate –

- Description
- Vendor Part
- UOM
- Green
- Class
- Commodity
- Unit Cost



- 3. Enter the Quantity
- 4. Choose a command.
 - a. **Done** - Return to the Purchase Request screen
 - b. **Add** – Add another line item
 - c. **Cancel** – Cancel this line item

Add Line Item - Add NonStock Part



- 1. Choose *Add NonStock Part*
- 2. Click **Next**

AiM Line Item ROLETEST About Logout

Done Add Cancel

View 3 Last Edited by ROLETEST On 06/17/2016 10:23 AM Status Open

Extra Description
Notes Log

Line Type NonStock

Contractor 2

Part 3

Address Code

UOM 4

Green No

Class

Quantity 5

Commodity

Unit Cost 6

Total \$0.00

3 Last Edited by ROLETEST On 06/17/2016 10:23 AM

1

1. Description – In the large **RED** box enter a description of the part needed.

Contractor 2

Address Code

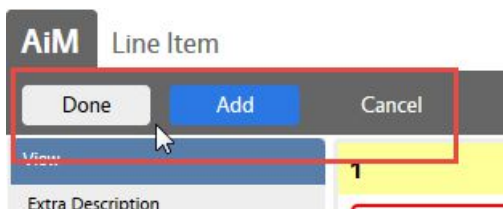
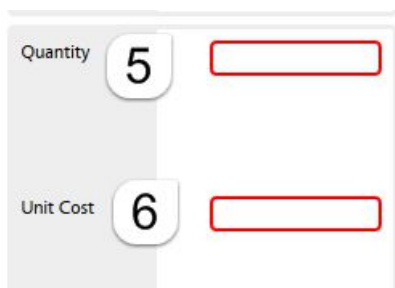
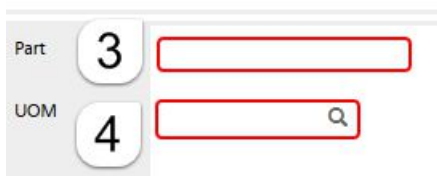
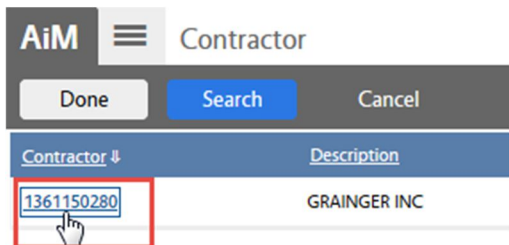
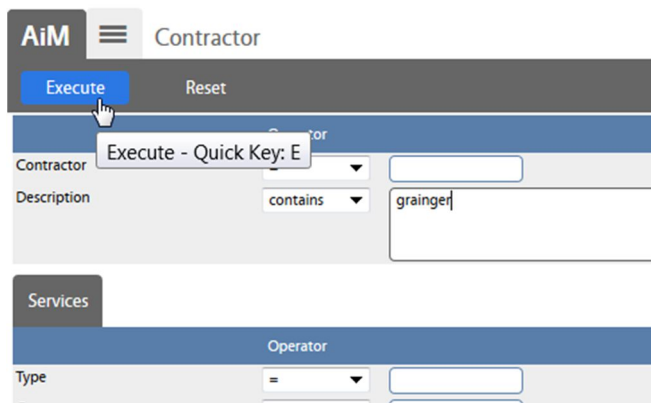
2. Choose a Contractor

- Click the magnify glass
- The list of contractors will appear
- Click **Search**.

AiM ☰ Contractor

Done Search Cancel

Contractor ↓	Description
1010862686	TRASHCANS UNLIMITED
1010905986	SIMBA INDUSTRIES



- d. Enter the name of the contractor in the Description field
- e. Click **Execute**
- f. Click the contractor's number

- 3. Enter a part number
 - a. If available, use the Vendor part number
- 4. Enter a UOM
 - a. Click the magnify glass to see the options

- 5. Enter the Quantity needed
- 6. Enter the Unit Cost

- 7. Choose a command.
 - d. **Done** - Return to the Purchase Request screen
 - e. **Add** - Add another line item
 - f. **Cancel** - Cancel this line item

Request Contractor Work

Start at the Phase. DO NOT click EDIT

- Click Material Request

1. Title Block
 - a. Material Request # is auto-generated.
 - b. Start the Description with “Contracted Services”. Once saved, it will show the Shop that is listed on the submitter’s User Profile. Warehouse will sometimes add information here.
2. Requestor Block
 - a. Requested By – Employee number of the technician requesting the material.
 - b. Date Needed – Date the material needs to be delivered or picked up
 - c. Deliver To - Employee number of the technician requesting the material
3. Line Item Block – *Line Items should match how the Contractor will invoice.*
 - a. Click **Add** to enter the Line Items

4.

AiM Add New Line Item

Next Cancel

Please Select:

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

5. Choose *Add NonStock Part*

6. Click **Next**

AiM Line Item ROLETEST About Logout

Done Add Cancel

View

Extra Description

Notes Log

3 Last Edited by ROLETEST On 06/17/2016 10:23 AM

Status **Open**

Line Type NonStock

1

Contractor 2

Address Code

Part 3

UOM 4

Green No

Class

Commodity

Quantity 5

Unit Cost 6

Total \$0.00

3 Last Edited by ROLETEST On 06/17/2016 10:23 AM

1

1. Description – In the large **RED** box enter a description of services being requested.

Contractor 2

Address Code

2. Choose a Contractor

- a. Click the magnify glass
- b. The list of contractors will appear
- c. Click **Search**.

AiM Contractor

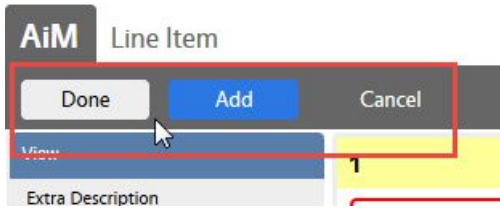
Done Search Cancel

Contractor	Description
1010862686	TRASHCANS UNLIMITED
1010905986	SIMBA INDUSTRIES

- d. Enter the name of the contractor in the Description field
- e. Click **Execute**
- f. Click the contractor's number

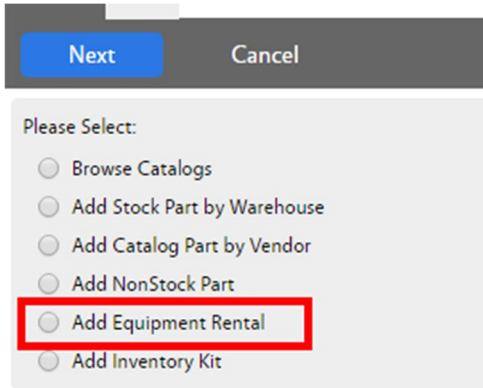
3. Part – Summarize the task – ex: Labor
4. Enter a UOM
 - a. Click the magnify glass to see the options

5. Enter the Quantity needed
 6. Enter the Unit Cost
- **If 1 set cost for the job, enter quantity as 1.

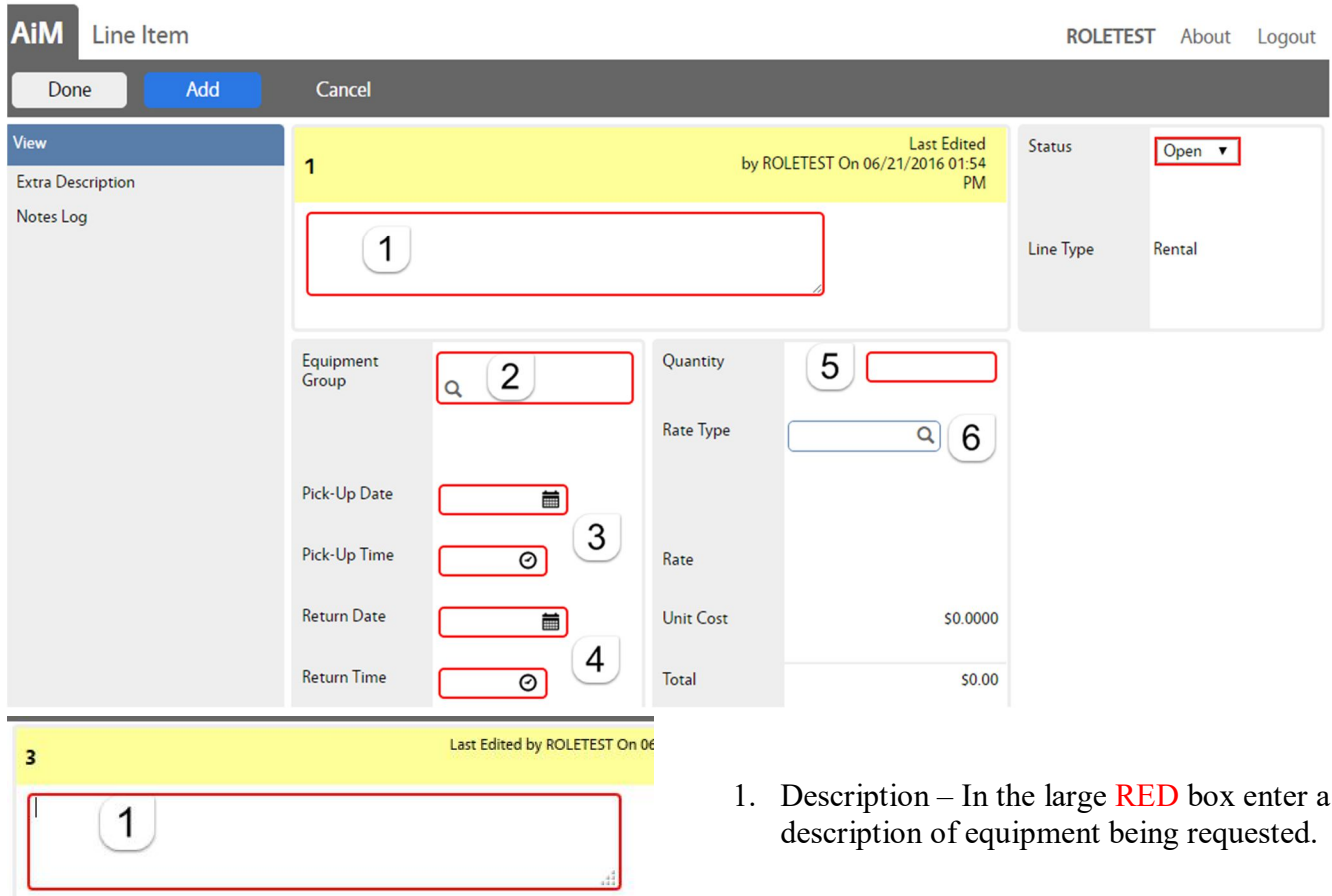


7. Choose a command.
 - g. **Done** - Return to the Purchase Request screen
 - h. **Add** – Add another line item
 - i. **Cancel** – Cancel this line item

Checkout Equipment from Warehouse



- Choose *Add Equipment Rental*
- Click **Next**



1. Description – In the large **RED** box enter a description of equipment being requested.

Equipment Group	SPOT COOLER
Pick-Up Date	Jun 22, 2016
Pick-Up Time	1:55 PM
Return Date	Jun 23, 2016
Return Time	1:55 PM
Quantity	1.0000
Rate Type	DAILY
Rate	\$100.00
Unit Cost	\$100.0000
Total	\$100.00

2. Choose the Equipment Group

3. Choose the Pick-Up Date and Time

4. Choose the expected Return Date and Return Time

5. Enter the Quantity needed

6. Choose the Rate Type (only one choice)

7. Choose a command.

j. **Done** - Return to the Purchase Request screen

k. **Add** - Add another line item

l. **Cancel** - Cancel this line item

Submit Purchase Request to Warehouse

The screenshot shows the AIM Material Request interface. At the top, there's a header with 'AiM Material Request' and user information 'ROLETEST About Logout'. Below the header are 'Save' and 'Cancel' buttons. The main form is divided into several sections:

- View:** A yellow bar with the request number '65695' and 'Last Edited by ROLETEST On 06/17/2016 09:17 AM'. The status is set to 'NEW'.
- Work Order:** '160613-166130' with a magnifying glass icon.
- Phase:** '001' with a magnifying glass icon.
- Shop:** 'MAINTENANCE'.
- Requested By:** '708116' with a magnifying glass icon.
- Date Needed:** 'Jun 17, 2016 09:18 AM' with a calendar icon.
- Deliver To:** '708116' with a magnifying glass icon.
- Region:** '02' with a magnifying glass icon.
- Facility:** 'B1' with a magnifying glass icon.
- Property:** '1504' with a magnifying glass icon.
- Location:** '208A' with a magnifying glass icon.

The 'Line Items' table is visible at the bottom of the form:

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	Subtotal	Status
1	Stock	#10PWA	CONICAL SCREW ANCHOR, PLASTIC, USE WITH #10 SCREWS, PACKAGE 100	PK	5.0000	\$2,7600	\$13.80	Open
2	Catalog	11K369	CONICAL SCREW ANCHOR, PLASTIC, #10, PK 100	PK	4.0000	\$2,7600	\$11.04	Open
3	NonStock	LABOR	Contracted Services	EA	1.0000	\$5,000.0000	\$5,000.00	Open

Once all of the line items are entered –

1. Click the magnify glass next to Status
2. Choose REQUESTED
3. Click 

****The Warehouse will not process the Purchase Request until the status says REQUESTED.**