HOW TO CREATE A NON-STOCK (VENDOR) MATERIAL REQUEST IN AIM

The Material Request screen is launched in AiM at the Work Order Phase level. From the AiM WorkDesk, search for the Work Order and click on your shop’s phase, click on the Launch Material Request icon.

1- Always put on the first line of the DESCRIPTION field: 6-character shopcode, your name, and the vendor name.

2- This screen auto fills the Work Order and Location blocks. Since the work order and phase are known, you can choose your employee EID by clicking on the Zoom button at the end of the REQUESTED BY field and pick from the list.

3- The DELIVER TO field will auto fill with the same EID based on the standard of delivery to the shop for all Material Requests, or leave blank and give specific directions in the MR Description.

4- The DATE NEEDED field must be a realistic date taking into account both the scheduled start date of the job and the necessary manufacturer lead time for the parts being ordered.

5- The STATUS field indicates the next step to be taken in the process and will be discussed later in the instructions.

At the bottom of the screen, click on the green plus icon to enter the Line Item screen.
Material Requests may be either stock or non-stock, and the two types may be combined into one Material Request for the same Work Order number. Multiple items are purchased on one Material Request by entering each on a separate Line Item.

Click in the radio button for either “Add Stock Part by Warehouse”, OR “Add NonStock Part.” In this example we are adding a Non-Stock part.

Click on the green arrow to move to the Line Item screen.

1. To fill in the Line Item Description you should remember that the Stores Coordinator only knows what part to buy based on the information you provide in this field. Be as complete as possible in your description. If the part comes in different sizes, different colors, right or left design, be certain to include your choice so the Stores Coordinator does not need to stop and contact you before placing the order.

2. The Contractor field is being used to help Stores distribute their workload. Type FS in the Contractor field and click on the Zoom button at the end. Choose from the list the Stores location nearest to you: Plant Services, Health Sciences or Southwest Zone. **NOTE: If you enter a vendor name in this box, your order could be delayed. ** You should not enter anything in the Address Code field, it will auto fill when you choose the Stores location. If you make a mistake here, simply clear out both the Contractor and Address Code fields and start again.

3. The field labeled Part can contain any type of identifying number that you may have for the part: serial number, model number, catalog number, manufacturer number. This field cannot be left blank so if you have no identifying number to use, type in the number of the Line Item given
at the upper left corner of the screen in the yellow box (1,2,3...) . Do NOT use abbreviations such as “NA.”

4. The UOM is the unit of measure for the part. Click on the Zoom button at the end of the field and you will see a list of possible measures. Click on the one that best represents what you want to purchase. If you have any doubt, add a line to the Description indicating what you need, for example: 5 each, 10-gallon buckets of base paint.

5. The quantity that you need per your unit of measure is the information to enter here. Using the same example as above, the quantity would be 5 and the part would be a 10-gallon bucket of base paint.

6. The unit cost is the price for one of the UOM. This field cannot be left blank and the software does not recognize a zero cost. If you do not know the cost, enter the best approximate cost. The final price will be adjusted at disbursement by the Stores Program Coordinators.

7. Click on the green Done flag to return to the Material Request screen or choose the green Plus sign to add another part from this vendor.

The last step when you return to the Material Request screen is to change the Status from the default of OPEN to the proper next step. Click on the Zoom button at the end of the Status field and you will get a pop-up window as shown below. The descriptions of the various Status levels indicate which one to choose for the next process step. Finally, click on the SAVE icon.

A Shop Lead in FMC has the authority to purchase job materials up to $2500. If your order is below $2500 not including taxes, freight, or other fees, the order should be sent directly to Stores. The choice of Status is “SEND TO FS STORES” and Save the Material Request.
If the total dollar amount exceeds $2500 for a Lead in FMC, the proper Status level is “TO SUPERV/MAINTCOORD” which sends the Material Request to the Shop Supervisor for approval. The Supervisor will open the Material Request and edit the Status to “SEND TO FS STORES.”

If the amount exceeds $5000 (dollar limit for FMC Supervisors), the order will need the approval of the Manager. The Supervisor should choose “TO MANAGER/AD” as the correct Status. The Manager or Assistant Director will review the order and when approved, change the Status to “SEND TO FS STORES.”

There is one Status reserved for the Project Managers in the FMC Construction group, “SEND TO STORES – ALTS.” This was created for work orders where a signed contract exists with the client agreeing to pay for the materials charged to a job. No further departmental approvals are needed and the orders of any dollar amount should be sent directly to Stores for processing.

- Other Status options exist to be used exclusively for shop equipment purchases or for internal use by the Stores Program Coordinators in their purchasing process.
- All assigned tools (FMC shops) should be ordered on Work Order 000001 for Tools and Equipment purchases and need to follow the FMC standard approval process.
- This is the same process previously followed using the paper Request for Purchase form to obtain signature approvals. The process has now been converted to an electronic approval process in AiM.
- There are certain phrases created for use with the Material Request in specific circumstances. The document referencing these terms is, “MATERIAL REQUEST GLOSSARY OF FIELD NAME DEFINITIONS AND GENERALLY USED TERMS” and should be referred to for further instructions on the Technology Toolbox.