HOW TO CREATE A STOCK (FS STORES) MATERIAL REQUEST IN AIM

A stock Material Request order is used when a part is being purchased from an FS Stores warehouse on campus. The initial activity is to search the Stores inventory and find the correct part number. All you need to know beyond that is what quantity you need and when to have the part delivered.

There are various types of searches for Stores inventory which are outlined in other documents on the Technology Toolbox. See: [http://www.washington.edu/facilities/fstech/node/613](http://www.washington.edu/facilities/fstech/node/613)

Once you have the part number you launch the Material Request 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 and your name. Stores is the vendor on any stock part and does not need to be identified in the top line of the Description.

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. The standard delivery time for a stock part is 12-24 hours to the shop.

5- Next step is to click on the green plus sign (+) to move to 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 Stock part.

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

Enter the Stores part number in the PART field and click on the Zoom button at the end.
Since this is a stock part all the other required fields are auto-filled.

Enter the quantity needed and click on the green DONE flag.

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.

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.