CPMS Newsletter
"As the Wrench Turns"

Purchase Request- Streamlining without Compromising

There are lots of new changes in CPMS 4.37, but probably the most exciting feature is the new **Purchase Request** option.

Many of our customers are taking advantage of all the powerful buttons on the CPMS screen forms which do most of the work for you. For example:

- When processing your PM Work Cards you can click on the buttons at the top of the form to add an open or closed Work Order with just a couple of clicks.
- You can also highlight individual PM Duties which were missed and then schedule a PM Residual Work Card with only a few clicks.
- When adding an Equipment Failure you can jump out to look at the PM's for that equipment, add a follow-up Work Order, or enter Parts used, all with just a click of a button.

And now, when viewing any Part, you can Check it out or enter a Purchase Request with just two clicks!

INSIDE THIS ISSUE

In the Parts Edit screen in the upper right corner, the Part Check Out button was added in version 4.36. This allows you to check out a part right from the parts screen. The only thing you need to add is the Equipment where the part was used.

Now there are three new buttons to make your life easier. The new Part Request button will add a Part Request Transaction. Currently, there are only Orders, Receipts, and Issue transactions. There is also a new Open Trans and Open POs button which are highlighted if there is any open activity for this part number. You can quickly determine if this part is "on the way" and there is no need to request it again.

Part Requests can be entered by Mechanics and the Parts/Purchasing Clerk. A new screen form (next page) allows you to approve just those requests you wish to make into Purchase Orders.

And, when you Print Parts at Minimum Quantity, or Generate PO's for Parts at Minimum, you now have an option to add these parts as Purchase Requests. You decide which parts to leave On Request and only approve those you want to make into Purchase Orders when you are ready!
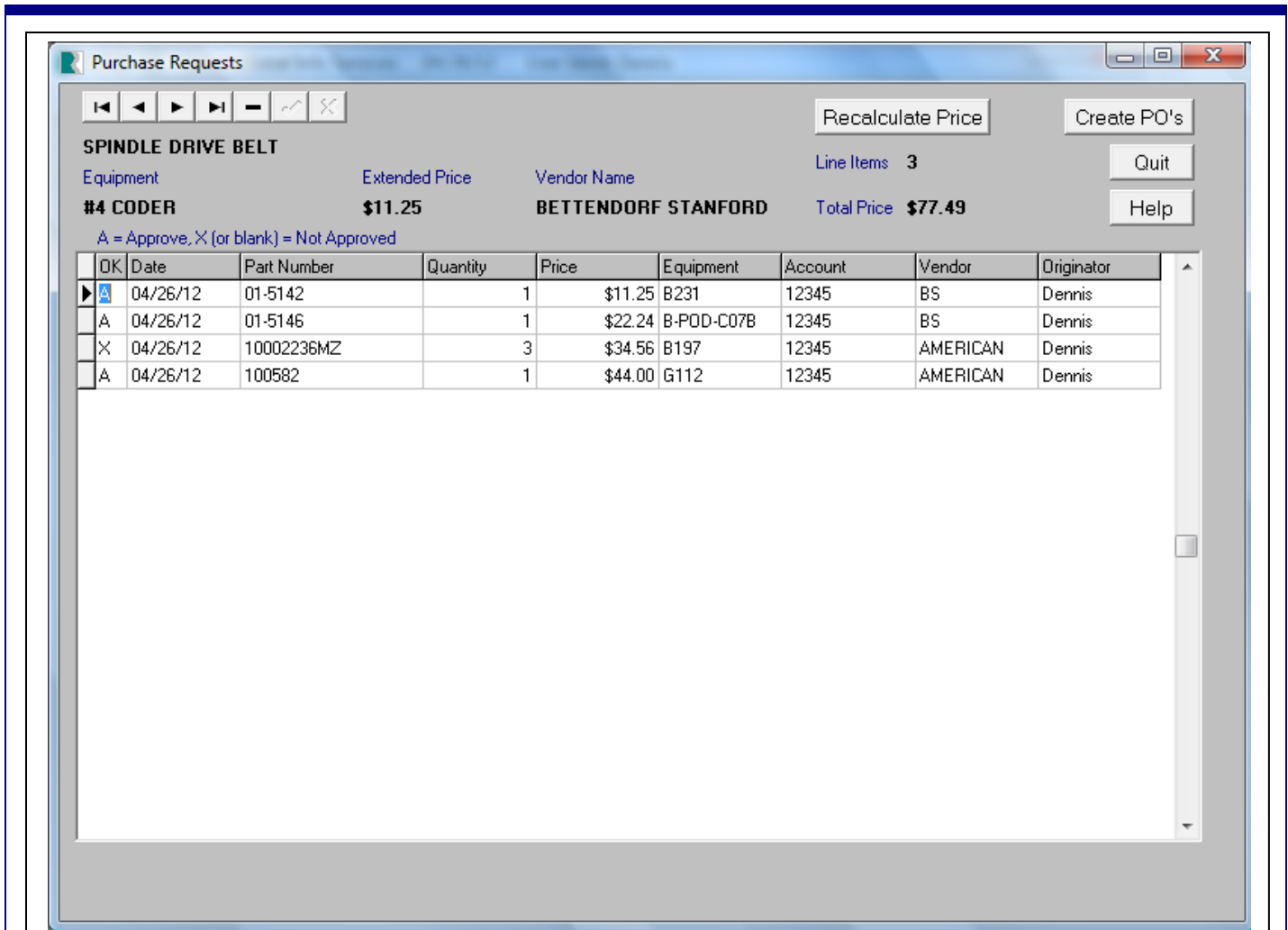
The new Purchase Request screen is where you manage requested parts. This is similar to the Work Request option where you decide which requests become Work Orders. Now you control which requested parts are added to Purchase Orders. (Not all plants use the Purchase Order system and so they can change Parts Requested directly into Parts Ordered.)

By using this new option you stay in control of your Inventory, allow Mechanics to request parts when they are using CPMS as a guest user, and streamline the Purchase Order function.

On the Purchase Request form you can delete requests, change any of the values (except part number), and even click the Recalculate Price button so you immediately know the total price of all approved Purchase Requests. When you click the Create PO's button, all parts for the same vendor will be added to the same PO, numbered

sequentially, and the requested parts are removed from Purchase Requests. The new PO's can still be edited, and when approved these parts become Orders in the Part Transaction (Open) table, as they do presently.

Using the new Purchase Request option, you never need to add another purchase order using the Add PO's screen (except for non stock items). We are always looking for new ways to reduce mouse clicks and keystrokes and this is certainly a great example.

The Part Transaction screen form has a new Request button!

CPMS Version 4.37

Similar to installing equipment at your plant, it is probably easier to put in a new machine than rebuilding an existing machine. It was a real adventure figuring out how to integrate a new Purchase Request function into CPMS, but we think you will find it extremely useful along with some of these other changes and enhancements.

1. Allow changes to the Originator and Origination Date on the Add and Edit Work Order screen forms.
2. Add an option to Print Parts at Minimum to include parts with activity greater than a date you enter.
3. Correct Check/Delete key column to work properly with the expanded Task Description table.
4. Don't allow future dates when closing Work Orders.
5. Optionally display the On Hand quantity on the Physical Inventory report.
6. Parts/Purchase Request Option with new action buttons on the Parts Edit screen. Display all requested parts on a browse screen before generating PO's. Allow change of quantity, vendor, price, etc., and display approved line items and total price.
7. Correct the Part Transaction screen form to drop in the price when the Vendor is selected.
8. Change the Part X-Ref to a browse screen when selected on the Equipment record screen so you are unable to change values.
9. When you attempt to add the same PO number again, the error message is "Values for rows in PURHDR must be unique". Change it to match the other primary key error messages, i.e., "PO Number must be Unique".

Tips and Techniques

If you mark a PM as not done, it will be rescheduled for next week (unless the PM frequency is weekly). Normally, CPMS will not print a PM twice if it "wraps around" to its normal PM frequency. For example, if a monthly PM is missed four weeks in a row, on the 5th week you might expect to see is:

1 Do this
1 Do this
2 Do that
2 Do that
3 Do something else
3 Do something else
...

CPMS will delete the duplicate task when it cycles around to its regular frequency, but only if it has the same equipment number, task description ident (for example "C" for monthly), employee number, task date, and task number ("M" for PM's).

If you mark a PM as not done, and then go to the Master Schedule and change the Description Ident (PM frequency), Employee Number, or Last Done date, and then generate a PM schedule, CPMS won't find the duplicate. For example, this will happen if you change the employee number and then generate your PM schedule. The prior employee is still in the rescheduled PM task for this week and will not be recognized as a duplicate.

You have probably noticed in the Master Schedule screen form that there may be a blinking "Open Tasks" on the top of the screen to let you know there is at least one PM task for the entry you are viewing. You are being warned that changes to the Master Schedule could affect an existing/open PM task.

And the Winner is...

Cindy Like from Lewis Bakeries, Vincennes, IN answered the last Quiz correctly and won $100.

The question was, how would you get a list of all the Parts which have had no activity in the past three years? And, what is the quickest way to know the total value of those spare parts?

Cindy provided a very comprehensive and correct answer below.

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Here are the steps needed to get a report of all parts that have had no activity in the last three years when you do this at the end of the year.

1.   Select the Print menu.
2.   Select the Standard Reports option on the Print menu.
3.   You should see a list of reports come up. Select the Parts (Standard) option.
4.   The selection column should be on Last Transaction.
5.   The selection operator should be on <=
6.   The selection value should be 12/31/08
7.   Click the OK button and then this report should be on the screen.

There are two very quick ways to know the total value of spare parts generated from the Activity Report above.

1.   Go to the last page of report you had just created and you will see two values on that last page.
a.   Total (Current Value)
b.   Total (Average Value)
2.   Look at the CPMS Main Screen in the Inventory Section. You will see two values there.
a.   Total number of items with no activity in the last three years.
b.   The number after that is the total dollar amount of the parts with no activity in the last three years.
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All we would add is that when providing someone with info from the Plant Summary; don't forget to click the Refresh button first.

CPMS Quiz

The Supervisor, Change Key Column option, allows you to change every occurrence of one key column value to another value. In addition, you can merge two key column values if you have accidentally entered the same information more than once. For example, you have entered the same vendor twice using two different idents.

You need to remember that if you merge two different values into one, after deciding which one to keep, make sure and manually copy/paste any data you want to keep from the old value into the new value.

For example, if you find that you have "AB" and "A/B" both entered for Allen Bradley, and you decide to keep "AB", you will want to look at both entries in the Vendor table and decide if there is anything you need to copy/paste from the "A/B" entry into the "AB" entry.

When you use the Change Key Column option to combine these two entries into one, an error message might occur. For **$100,** what might cause an error that requires you delete one or more rows from the Part/Vendor XRef table?

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