

CPMS Newsletter

“As the Wrench Turns”

Volume 22, Issue 3

November 2016

Part 2 - How to make reordering parts almost automatic

In our last CPMS newsletter we mentioned that there are some great features being used by just a few plants. In Part 1, we provided some detailed instructions on how to attach Pictures, Drawings, MSDS, and PDF Files to various screen forms to use in CPMS. In this issue, we will discuss how:

- The Parts Clerk or Mechanic can request parts.
- Requested parts can be reviewed and approved based upon this period's budget and priorities.
- The total dollar amount for approved parts is displayed on the Purchase Request screen.
- When you are satisfied with the approved parts requested, you can click the Create PO's button and purchase orders will automatically be generated, grouped by vendor, and ready to print. You don't have to add PO's anymore!
- If you are not using the Purchase Order module, then when you run Part Transactions you can convert all/some of the Part Requests directly to Order Transactions.

Compare managing your parts using this approach versus ordering/purchasing parts one at a time.

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What are the prerequisites for using the Part Request module?

Your inventory should be accurate in order to really benefit from requesting parts and/or generating PO's automatically. For example, if you have no order transactions for a part to determine the most recent vendor, CPMS will use your company vendor ident as the default vendor. Ideally, all parts have at least one order in Part Transactions (closed).

We always recommend using manufacturer's part numbers, standardized part descriptions, proper part locations, accurate on hand quantities, and one or more entries in the part/equipment cross reference.

Step by step instructions for an easier way to order parts

Whether or not you are using the Purchase Order module, you can take advantage of automating part requests into orders. But, they use two different paths in CPMS.



In either case, you can request parts by simply clicking the Part Request button on the Parts Inventory screen. This will create a Part Request transaction in the Parts Trans (Open) table.

For the Parts Clerk or Mechanic, it's just one click to create a request. On the Part Request screen (below) the only required entry is the equipment number where the part will be used (or enter your default equipment number for spare parts). The default order quantity is one.

If there are any Part Requests, you will see all of them on the Purchase Request screen form when you go to Run Programs, Part Transactions. After exiting the form, you are asked:

If you answer "No" because you are not using the Purchase Order module, you can individually change any of the Part Transactions from a Request to an Order by simply clicking the transaction code button.

If you are using the Purchase Order module this is your opportunity to review, change, and approve Requests into Orders. And then print Purchase Orders for requests you just approved!

Ordering Parts: The old way and an easier way

You can print the Parts at Minimum Quantity report or use the Part Transaction Processing report to reorder parts. If you don't have a lot of confidence in your part quantities you may wait for mechanics to tell you which parts need to be reordered. Next, you can go to Purchase Orders, Add PO's, and completely fill in a blank form (below) entering one part at a time.

And, don't forget that every time the vendor changes as you are adding parts, you need to enter a new PO.

Is there an easier way? Yes.

Take a look at the Purchase Request screen form below where all of the parts you need to order are already entered for you.

OK	Date	Part Number	Quantity	Price	Equipment	Account	Vendor	Originator
A	11/16/16	00612397	2	\$41.00	108-310		306082	Mech A
X	11/16/16	005-01235400	1	\$119.00	C05-300		206175	Mech B
A	11/16/16	074-01-023	1	\$80.60	C00-936		8045	Mech A
A	11/16/16	08-002459	1	\$20.13	T00-925		200992	Mech A
X	11/16/16	08-002459	2	\$20.13	T00-925		200992	Mech C
A	11/16/16	103454	1	\$69.24	C01-917		MISSION	Mech A

Simply by clicking the Part Request button on the Parts screen form you create a new part request. Then, on the Purchase Order menu, choose "Process Purchase Requests Now" which will display the Purchase Request screen form. Change the status to "A" for parts you want to order. When you click "Create PO's" it is the same as if you filled out the Add PO's screen.

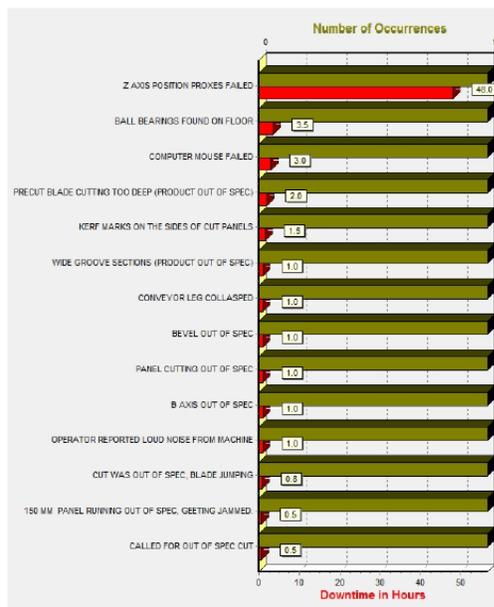
The key is that you are ordering the same parts over and over again, and so why not use your most recent orders to make new PO's. You can still change vendor, price, etc., and you are using your most recent purchases for default values.

Please give it a try or let us walk you through it.

Welcome to a new customer

Windkits LLC, Allentown PA, are manufacturers of material core kits for wind turbine blades. George Gross heads up the maintenance department and has recently install CPMS. After entering just a few equipment problems, he ran the Equipment Failure Trends report. The next step is to standardize problem descriptions in order to identify reoccurring problems and perform "root cause analysis".

November 8, 2016 11:49 AM Selection: * By Occurrences
Equipment Failure Trends Page 1 of 1
 WINDKITS, LLC
 From: 10/17/16 To: 10/28/16



And the Winner is...

Just in case you have not noticed, we frequently use a recent question from one of our CPMS users for the next Newsletter quiz. That is almost like getting the answers to the test ahead of time! We expected at least one person would send us the right answer, but no one did. So, we will try again.

The question was, "... if a mechanic completed and turned in his PM work card, and the Planner misplaced it, how would you show those PM's were completed?"

The assumption is that when the week was processed, all the PM's for that mechanic were marked as Not Done. So, go to Supervisor Query/Edit and bring up Tasks (Closed) where the Task Number Contains "M" (for PM's) and enter last week's date range and the employee number. Position your cursor under the status (TK_STAT) and change all the values to "C" for completed. You can also use "Replace All Column Values" to change them all at once.

CPMS Quiz

For \$100

If you printed the standard report for Parts (Standard) and had a condition with multiple selection columns, how would you save that condition to use the next time you need to run that same report?

Last but not least, a very Happy Thanksgiving to everyone!

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