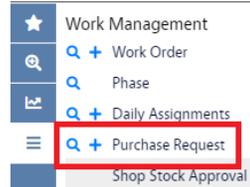


## Create a Purchase Request

A **Purchase Request** is filled out by an employee to request stock items from inventory and/or items not carried in the warehouse. Both may be combined on one request.

1. A request can be started from the menu or from a Phase. Started from the Phase is easier since the request can copy need information from the Phase.

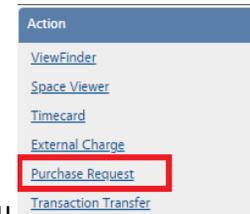


- a. From the menu, under **Work Management**

- i. Click **+** to start a new **Purchase Request**

- ii. Click **Purchase Request** hyperlink and then click 

- b. From the Phase you want to buy the materials on.



- i. Click the Purchase Request hyperlink in the Action menu

2. This will bring you to the Purchase Request screen.

The screenshot shows the 'AIM Purchase Request' form. At the top, there are 'Save' and 'Cancel' buttons. The form includes a 'View' sidebar on the left and a main content area. The main content area has a header with '1057' and 'Last Edited by SCOTT LLOYD On 10/14/22 8:29 AM'. Below this are several input fields: 'Work Order' (W2000082), 'Date Needed', 'Region' (UCB), 'Phase' (001), 'Requested By', 'Facility' (MAIN CAMP), 'Notify When' (Do Not Notify), 'Deliver To', 'Property' (213), and 'Location'. At the bottom, there is a 'Line Items' table with columns: Line, Line Type, Part/Equipment, Description, Contractor, Address Code, UOM, Quantity, Unit Cost, Subtotal, and Status. There are 'Remove' and 'Add' buttons at the bottom right of the form.

Because the above Purchase Request was started from a Phase the **Work Order, Phase, Shop, Region, Facility, Property** and **Location** (which was blank on the phase) were filled in. If you start the request from the main menu you should fill in the **Work Order** and **Phase** first as these will fill in the other fields for you.

3. Enter the **Date Needed**.
4. Optionally, fill in the following fields:
  - a. **Requested By**
  - b. **Notify When** (applies to the **Requested By**)
  - c. **Deliver To**
  - d. **Notify When** (applies to the **Deliver To**)

The screenshot shows a request form with the following fields and values:

- Request ID:** 1057 (highlighted in yellow)
- Last Edited by:** SCOTT LLOYD On 10/14/22 8:29 AM
- Status:** (empty search field)
- Total:** 50.00
- Work Order:** W2000082 (searched)
- Phase:** 001 (searched)
- Shop:** ELECTRICAL (link), CENTRAL ELECTRICAL
- Date Needed:** Oct 17, 2022 10:31 AM (calendar icon)
- Requested By:** ANTEQUER (searched), BEATRIZ ANTEQUERA
- Notify When:** Complete (dropdown)
- Deliver To:** CALVOA (searched), ANDREW CALVO
- Notify When:** Complete (dropdown)
- Region:** UCB (searched), UNIVERSITY OF COLORADO BOULDER
- Facility:** MAIN CAMP (searched), MAIN CAMPUS
- Property:** 213 (searched), 1135 BROADWAY (1135BRD)
- Location:** (empty search field)

5. To add other materials you need to the request, click 
6. First you need to select what, in general, you are ordering on this line.

**AIM Add New Line Item**

Next Cancel

Please Select:

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

**A. OPTION - Browse Catalogs**

- a. Browsing the warehouse part catalogs is simple. You search by part category instead of description. You will be asked to select and Class and Commodity at a minimum, but you can narrow the search more by also selecting an Inventory Item classification also.

**AiM Part Selection**

Done Search Cancel

Class

Commodity

Inventory Item

Green

Do not see what you are looking for? [Add NonStock Part](#)

Inventory Part Vendor Part Part Description

b. Click

**AiM Part Selection** SCOTT ⓘ ↗

Done Search Cancel

Class

Commodity

Inventory Item

Green

Do not see what you are looking for? [Add NonStock Part](#)

| Inventory Part              | Vendor Part | Part Description                                       | Contractor | Address Code | Vendor Description | Unit Cost | Issue Factor |
|-----------------------------|-------------|--|------------|--------------|--------------------|-----------|--------------|
| <input type="radio"/> P0972 | 27181       | IDEAL 45-615 INDUST. REFLEX STRIPPER                   | 1045       | NA           | REXEL              | \$18.0900 | 1            |
| <input type="radio"/> P2257 | 41405       | GREENLEE HOLE SAW 1 1/8" FOR 3/4 CONDUIT P/N 825-1-1/8 | 1045       | NA           | REXEL              | \$9.1020  | 1            |
| <input type="radio"/> P2182 | 99220587    | HEX KEY SET "SMALL" GRAINGER # 6X301                   | 12957      | NA           | FASTENAL COMPANY   | \$3.6936  | 1            |
| <input type="radio"/> P0972 | 10F545      | IDEAL 45-615 INDUST. REFLEX STRIPPER                   | 1318       | NA           | WW GRAINGER INC.   | \$22.8200 | 1            |
| <input type="radio"/> P2136 | 13J322      | CAULK GUN 1/4 GAL. GRAINGER P/N 5E116 22-61-144        | 1318       | NA           | WW GRAINGER INC.   | \$15.5800 | 1            |
| <input type="radio"/> P2262 | 1AVC2       | HEX DRIVER 1/4 GRAINGER P/N 3UU45                      | 1318       | NA           | WW GRAINGER INC.   | \$1.6330  | 1            |
| <input type="radio"/> P2263 | 1AVC4       | HEX DRIVER 5/16 P/N 3UU47 22-61-889                    | 1318       | NA           | WW GRAINGER INC.   | \$1.8800  | 1            |

c. Scan the list and select the part you want. (You can only select one at a time.)

Click:

**AiM Line Item** SCOTT ⓘ Help ↗

Done Add Cancel

View

Extra Description

Notes Log

Related Documents

1 Last Edited by SCOTT LLOYD On 10/14/22 8:48 AM Purchase Request 1057

HEX DRIVER 5/16 1AVC4

Status

Line Type

Warehouse

STORES WAREHOUSE

Part

HEX DRIVER 5/16 1AVC4

Class HARDWARE

Commodity

HARDWARE

TOOLS

Vendor UOM EA

Green No

Quantity

Unit Cost \$2.1800

Total \$0.00

- d. On the Line Item,
  - i. Fill in the **Quantity**
  - ii. Click:

**Note:** If you cannot find the part in the Part Selection, and you know it is not a stocked part, you can go directly to the NonStock Part ordering screen by clicking the "Add Nonstock Part" hyperlink on the Part Selection screen.

### B. OPTION - Add Stock Part by Warehouse

- a. You will need to pick a **Warehouse** unless there is only one, in which case that warehouse will be selected and you will go to the Line Item screen.

AIM Line Item

Done Add Cancel

View 2 Last Edited by SCOTT LLOYD On 10/14/22 8:57 AM

Extra Description

Notes Log

Related Documents

Purchase Request 1057

Status Open

Line Type Stock

Warehouse STORES

Part

Quantity

Unit Cost \$10.1900

Commodity

Total \$0.00

Vendor UOM EA

Green No

- b. On the Part field click
- c. On the Inventory Part Profile you can search for an inventory part using any of the fields (or a combination of them) to find the part you need.

#### AIM Inventory Part Profile

Execute Reset

Operator

Part =

Description contains WRENCH

Class =

Commodity =

Item =

Type =

UOM =

Green =

- d. Click:
- e. You will get a list of parts matching your criteria. Click the Part hyperlink to select the part and return to the Line Item screen.

#### AIM Inventory Part

| Part                   | Description  | Green |
|------------------------|--|-------|
| <a href="#">P2221</a>  | WRENCH ADJUSTABLE 6" 3R364                             | No    |
| <a href="#">P2222</a>  | WRENCH ADJUSTABLE 8" KLD507-8 GRAINGER 3R370           | No    |
| <a href="#">P2223</a>  | WRENCH KLEIN 506-10 OR PROTOJ710G 3R376                | No    |
| <a href="#">P2229</a>  | WRENCH PIPE STR. 10" ALUM. RIDGID 31090 GRAINGER 6A650 | No    |
| <a href="#">P2230</a>  | WRENCH PIPE STR. 14" ALUM. RIDGID 31095 GRAINGER 6A651 | No    |
| <a href="#">P2231</a>  | 6" PIPE STEEL PIPE WRENCH GRAINGER# 3R411              | No    |
| <a href="#">P2239</a>  | LIQUID WRENCH SUPER PENETRANT, 11 OZ. #L1-12           | No    |
| <a href="#">TAW332</a> | WRENCH, ALLEN 3/32 IN                                  | No    |
| <a href="#">TAW516</a> | WRENCH, ALLEN 5/16 IN                                  | No    |

- f. On the Line Item screen you will need to fill in the Quantity.

**AiM Line Item** SCOTT ⓘ Help ↗

Done Add Cancel

View 2 Last Edited by SCOTT LLOYD On 10/14/22 8:57 AM Purchase Request 1057

Extra Description WRENCH, ALLEN 3/32 IN Status Open

Notes Log Warehouse STORES Part TAW332 Class WRENCH, ALLEN 3/32 IN Unit Cost \$10.1900

Related Documents Commodity TOOLS Vendor UOM EA Green No Total \$0.00

Line Type Stock

g. Click:

### C. OPTION - Add Catalog Part by Vendor

- a. You will go to the Line Item screen that allows you to pick the Contractor (vendor) and then one of the parts sold by the Contractor.

**AiM Line Item** DALLACE ⓘ Help ↗

Done Add Cancel

View 1 Last Edited by DALLACE UNGER On 6/15/22 12:18 PM Purchase Request 1086

Extra Description Status Open

Notes Log Contractor Address Code Vendor Part UOM Green No Class Commodity Total \$0.00

Related Documents Line Type Catalog

b. On the Contractor field, click

**AiM Contractor**

Done Search Cancel

| Contractor ↓                    | Description |
|---------------------------------|-------------|
| <a href="#">ACE HARDWARE</a>    |             |
| <a href="#">AIRGAS USA</a>      |             |
| <a href="#">AKRON INDUSTRIA</a> |             |
| <a href="#">ALCO-CHEM INC.</a>  |             |
| <a href="#">AMAZON</a>          |             |
| <a href="#">AMERICAN AIR FI</a> |             |

- c. You will be taken to a list of Contractors in your system. If you need to, you can click  to narrow the list of Contractors. Once you find the Contractor you are looking for, click the Contractor Hyperlink to select the Contractor. This will also return you to the Line Item screen with the Contactor information filled in.
- d. On the **Vendor Part** field, click 

**AiM Vendor Part**

| Vendor Part #              | Description  | Green |
|----------------------------|--|-------|
| <a href="#">GO1903-02</a>  | PURELL ADV HAND SAN GREEN CERT GEL 1200ML LTX-12 2/C       | No    |
| <a href="#">GO1904-02</a>  | PURELL ADV GREEN CERT INST HAND SAN FOAM 1200ML LTX-12 2/C | No    |
| <a href="#">GO1905-02</a>  | LTX-12 PURELL ADVANCED HAND SANITIZER FOAM 2/C             | No    |
| <a href="#">GO15072-02</a> | PURELL HC HEALTHY SOAP CM FM ES+ 2/1200ML/CS               | No    |

- e. This is a list of all the parts the Contractor sells. You can click  to narrow the list of parts. Once you find the part you are looking for, click the Vendor Part hyperlink to select the part and add the information to the Line Item screen.

**AiM Line Item**

Done Add Cancel
SCOTT ⓘ Help ↗

**View**

Extra Description

Notes Log

Related Documents

**3**
Last Edited by SCOTT LLOYD On 10/14/22 9:05 AM

PREMIUM HIGH DENSITY PTEE THREAD SEALANT TAPE, 1/2 X 1296

Contractor

WW GRAINGER INC.

Address Code

NA

NA

NA

NA

Vendor Part

PREMIUM HIGH DENSITY PTEE THREAD SEALANT TAPE,

UOM EACH

Green No

Class PLUMBING

PLUMBING

Commodity REPAIR PARTS

REPAIR PARTS

Purchase Request 1057

Status

Line Type

Quantity

Unit Cost \$3.1000

---

Total 50.00

- f. You will need to enter the **Quantity** and then click  to add the line to the Purchase Request.

**D. OPTION - Add Service**

- a. You will go to the Line Item screen with only a few required fields.

Done Add Cancel
SCOTT ⓘ Help ↗

**View**

Extra Description

Notes Log

Related Documents

**1**
Last Edited by DALLACE LINGER On 6/15/22 12:22 PM

Contractor

Address Code

Quantity

Unit Cost

---

Total

Purchase Request 1086

Status

Line Type Service

- b. **Description** – You are required to provide a description of the services.

- c. **Total** – You must provide a cost for the services.
- d. **Optional** – You can provide a **Contractor** and their **Address Code** if you know it. The **Quantity** and **Unit Cost** are also not required.

The screenshot shows the 'AiM Line Item' form for Purchase Request 1057. The form is titled '4' and was last edited by SCOTT LLOYD on 10/14/22 at 9:16 AM. The description field contains 'RUN EXTERIOR GALVANIZED ELECTRICAL CONDUIT THROUGH EXTERIOR WALL BACK TO JUNCTION BOX'. The Contractor field is populated with 'GRAYBAR ELECTRIC COMPANY INC'. The Address Code field is set to 'NA'. The Total field is set to '2500'. Red arrows point to the description, Contractor field, and Total field.

- e. Click **Done** to add the line to the Purchase Request.

**E. OPTION - Add a NonStock Part**

- a. You will go to the Line Item screen with only a few required fields.

The screenshot shows the 'AiM Line Item' form for Purchase Request 1086. The form is titled '1' and was last edited by DALLACE UNGER on 6/15/22 at 12:23 PM. The description field is empty. The Contractor field is empty. The Address Code field is empty. The Part field is empty. The UOM field is empty. The Green field is set to 'No'. The Class field is empty. The Commodity field is empty. The Total field is set to '50.00'. Red boxes highlight the description, Part, UOM, and Total fields.

- b. **Description** – You are required to provide a description of the part.
- c. **Part** – The part number of the part.
- d. **UOM** – Select a unit of measure from the list by clicking .
- e. **Quantity** – Number to purchase.
- f. **Optional** – You can provide a **Contractor** and their **Address Code**, the **Unit Cost** and **Commodity** if you know them.

g. Click **Done** to add the line to the Purchase Request.

F. OPTION - Add Equipment Rental – Ignore as this is not used.

G. OPTION - Add Inventory Kit – Ignore as this is not used.

7. When all parts you need to order are on the Purchase Request, change the status to the status to send the Purchase Request off to be processed.

| Line | Line Type | Part/Equipment | Description  | Contractor | Address Code | UOM | Quantity | Unit Cost | Subtotal   | Status |
|------|-----------|----------------|--|------------|--------------|-----|----------|-----------|------------|--------|
| 1    | Stock     | P2263          | HEX DRIVER 5/16 1AVC4  |            |              | EA  | 1.0000   | \$2.1800  | \$2.18     | Open   |
| 2    | Stock     | TAW332         | WRENCH, ALLEN 3/32 IN  |            |              | EA  | 1.0000   | \$10.1900 | \$10.19    | Open   |
| 3    | Catalog   | 3PDL1          | PREMIUM HIGH DENSITY PTEE THREAD SEALANT TAPE, 1/2 X 1296                              | 1318       | NA           | EA  | 1.0000   | \$3.1000  | \$3.10     | Open   |
| 4    | Service   |                | RUN EXTERIOR GALVANIZED ELECTRICAL CONDUIT THROUGH EXTERIOR WALL BACK TO JUNCTION BOX. | 1007       | NA           |     |          |           | \$2,500.00 | Open   |
| 5    | NonStock  | 982192         | STAINLESS STEEL ROUND 1.5" WALL FLANGE   | 54         | NA           | EA  | 1.0000   | \$27.4500 | \$27.45    | Open   |

a. On the **Status** field click

b. Select the correct status by clicking on the Status hyperlink.

**AiM** Purchase Request Status

| Done                              | Search   | Show All | Cancel |
|-----------------------------------|--|----------|--------|
| Status                            | Description                                    |          |        |
| <a href="#">INITIATION</a>        | INITIATION                                     |          |        |
| <a href="#">CANCELED</a>          | CANCELED                                       |          |        |
| <a href="#">STOCK SUBMIT</a>      | STOCK INVENTORY ORDER SUBMITTED                |          |        |
| <a href="#">SUPV REVIEW</a>       | SUPERVISOR REVIEW                              |          |        |
| <a href="#">REJECTED</a>          | REJECTED                                       |          |        |
| <a href="#">MANAGER REVIEW</a>    | MANAGER REVIEW                                 |          |        |
| <a href="#">ASSOC/ASST DIR RE</a> | ASSOCIATE DIRECTOR / ASSISTANT DIRECTOR REVIEW |          |        |
| <a href="#">APPROVED</a>          | APPROVED                                       |          |        |
| <a href="#">IN PROCESS</a>        | IN PROCESS                                     |          |        |
| <a href="#">FINALIZED</a>         | FINALIZED                                      |          |        |

8. Click  on the Purchase Request screen.