

Part Request Overview

Reference Guide

Version 24.x

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Overview and Summary

M5 provides the ability to request parts needed for work orders where only the description can be entered, allow parts personnel to review the requests and take action on them, and require Shop Supervisor approval of part requests when necessary.

FleetFocus M5 contains frames called Part Issue Request and Part Issue Response. Part Issue Request and Part Issue Response are tied to specific functionality that is used with a process to manage uniforms, products and goods related to Quarter Master. This logic remains intact and unchanged.

To use the functionality for Part Requests, there are several assumptions made about the shop and parts work flow processes that exist in your organization/specific maintenance locations:

1. Real time labor capture is implemented with the use of the Labor Wedge (not required but it is integrated with part requests) frame.
2. Real time work order processing for most if not all work orders; not after the fact batch entry of work order data.
3. There is a parts room managed by personnel separate from the Technicians.

Configuration

The use of the Part Request frames in M5 requires a review of system flags and role privileges. A system flag has been added that controls whether users can see the part request hyperlinks and icons on Labor Wedge. System Flag 5292 – “Allow Part Requests on Labor Wedge?(Y/N)” The default is N to preserve existing functionality. If system flag 5150 – “Display CURRENT LABOR information on LABORWEDGE (Y/N)” is Y, and the new system flag is also Y, then part request icons will display for each row that exists on Labor Wedge.

There are two role privileges:

1. APPROVE PART REQUEST – Allows a user to select the “approve” checkbox on the Part Request Handling frame.
2. EDIT SHIP TERMS – Allows a user to enter a valid value in the “ship terms” column on the Part Request Handling frame.

Functionality

A part request can be submitted using a new frame in M5 accessed from the menu or, it can be created directly from the Labor Wedge frame.

Part Request

The Part Request frame is accessed from the menu. A work order and job must already exist in order to create a part request.

The Part Request frame is used to submit part requests to be handled by the personnel controlling inventory in a parts room setting. It is a means of communication that parts are needed for a specific Technician/Work Order/Job code along with a need by date. The Technician will enter the information for parts needed into the Part Request frame. Part number is not required and the part description can be entered instead, along with a request qty. The part number LOV supports three types of LOV searches and they are: search for parts issued to any unit with the same tech spec and job code combination, a list of standard parts if they exist for the job (standard job tech spec) and the part catalog by location search. The location where the parts are being requested will default to the inventory location associated to the job location. A note can be entered for the request. After saved, the request will be routed to the Part Request Handling frame.

All existing part requests for the work order and job are displayed at the bottom of the Part Request frame regardless of the Technician that submitted the request. This is helpful in case a Technician is out and another Technician has taken over the work order/job.

If a mistake occurs, the Technician is allowed to cancel the request by selecting the existing row at the bottom of the frame and selecting the delete icon as long as the request is in REQUEST status.

The Technician will save the part request and the form does not clear allowing the Technician to quickly enter a request for a new part for the same work order and job.

A part request will have several statuses:

1. REQUEST – New request created.
2. ORDERED – Part had to be ordered using part requisition or purchase order.
3. REQ APPROVE – Requires supervisor approval.
4. IN-REQ – The part request has been made into a part requisition.
5. APPROVED – Supervisor approved part request.

6. READY – Parts person has changed the status to ready which will alert the Technician the parts are ready for pickup.
7. CANCELLED – Either the Technician, Supervisor, or Parts Person can cancel the request.
8. CLOSED – The part has been issued.

Labor Wedge

There are several ways a Technician can create a part request from the Labor Wedge frame.

Images have been added next to the work order and job code that means part requests are in various statuses. The icons can be selected which will launch a display frame showing the part request details. A new column has been added to the right called “new request” with a hyperlink that allows a user to create a new part request with the row’s details such as employee number, work order and job code.

The green dot next to a work order means there are requests in READY status. If it is on the job, it means the job has a part request in READY status.

The yellow exclamation icon next to a work order means there are parts in REQUEST, ORDERED, IN-REQ, and APPROVED status. If it is on the job, it means the job has for that work order has the same.

The red stop sign means there are part requests for the work order/job that are in REQ-APPROVE status. Only authorized users (based on the new privilege mentioned above) can approve a part request.

If the employee double-clicks the row, the process of signing off and on a job brings up the next frame.

The various colors (green, yellow and red) are also used to display the status of related part requests as shown in new part request hyperlinks on this frame.

To create a part request for the job the employee is logged into, then they need to select the “part requests for this job” located next to the job code. The hyperlink launches the new Part Request frame. Creating the part request in this manner (vs. the menu) will pre-populate the Technician ID, work order number and job code so there are less key strokes. The Technician can see any existing part requests on the Part Request frame along with the status.

The “view my part requests” hyperlink is a hover table that when the user hovers the cursor over it, shows all requests for all work orders/jobs for the specific employee logged in that are not in CANCELLED or CLOSED status.

Part Request Handling

1. Query and review part requests details and enter a part number if only the description is provided.
2. Use hyperlinks to pre-populate information to other existing frames in M5 including Part Requisition, Part Purchase Orders and Part Issue.
3. Require a part request to be approved by the Supervisor.
4. Allow the Supervisor to approve a part request and enter ship terms.
5. Cancel a part request.

The top of the Part Request Handling frame shows the data being queried. The user may change this information to filter on more specific data. The defaults are location (this is the location the user is logged into), status of REQUEST for part requests where the need by date is within 30 days.

The list of parts is displayed in an i-frame at the bottom of the frame. The fields allowed to be added or edited are part number and request quantity.

The part number contains the location stock inventory LOV to search for part number.

A part request can be cancelled by deleting the row.

The parts personnel can decide to require approval for the part request from a Supervisor. The parts person can select the select box to “require approval” and it will lock the part request row.

The Supervisor will review the part requests on the Parts Request Handling frame that need approval can select the checkbox approved. There is a column called “ship terms”. Ship terms in not required.

If a part request contains a part number that must be ordered, then the parts person can select the row containing the part to be ordered then select the “Part Purchase Requisition” or “Part Purchase Order” from the “more actions” hyperlink on the Parts Handling frame. The user will be prompted to create a new Part Purchase Order or Part Purchase Requisition.

Both the Part Purchase Requisition and Part Purchase Order frames have been modified with a new tab containing part requests. The user must select the select box to add the part request to the Part Purchase Order or the Part Purchase Requisition.

A part reservation will be made on the Part Purchasing Requisition or Part Purchase Order for the work order associated to the part request.

If a Part Requisition is created, typically the next step is to approve the requisition before it can be placed on a Purchase Order (unless conducting automatic approvals – see location main/inventory tab setting called Must a supervisor approve a manual requisition?). It is important to note that after the part requisition is created from a part request then it will be shown as a part requisition on the Part Purchase Orders frame – it will not be shown in the part request tab.

Part Requests that were in an ORDERED status, after received, will automatically be changed to a status of READY.

After the ordered parts have been received, any part that has a request must be issued from the Part Request Handling frame.

To issue the part, select the row for the part on the Part Request Handling frame and hover over the “more actions” hyperlink and select part issue.

Please note, only parts in a READY status can be issued. If the part is in REQUEST status and available to issue without ordering, then the user can select the READY checkbox for the part request and save.

After selecting the Part Issue hyperlink, a content-2-window displays and allows the user to issue any part requests for the specific work order and job that are in the status of READY. Serialized, lotted, parts requiring position codes, parts with cores and warranty are all allowed to be issued from the Part Request Issue frame.

Important Rules/Tips

1. Non-stock, serialized, lotted, parts requiring position codes, parts with cores and warranted parts are all allowed to be issued from the Part Request Issue frame. However, any related fields will be made required and must be entered upon issue.
2. A work order cannot be closed if part requests exist in any status other than CANCELLED and CLOSED.
3. A part reservation cannot be changed on the Part Reserves frame if it came from a Part Request.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.