Inventory Process - High Level

- I need a part, I go to my satellite and see if it is stocked
  - If yes, I complete an Issue Request listing the satellite in the warehouse field and use the parts
  - If no, I check the Central Storeroom (ZN4) to see if part is listed in the catalog
    - If yes, I complete an Issue Request for the parts listing ZN4 in the warehouse field. Parts requested by 3:30pm will be delivered by 7:30am the next business day if they are in stock in ZN4. Otherwise, they will be ordered and delivered to the requestor the day after they are received from the vendor.
    - If no, I complete a Purchase Requisition listing ZN4 as the warehouse and Direct as the part number.

- If I have parts left over after the job is done, I place them on the return to stock shelf in the satellite warehouse and affix either the original Issue Receipt or WO.

NOTES:

- At any time, I can call 6-5000 for assistance.
- If need for stocked part is urgent, I will call 6-5000 to expedite delivery.
- If need for a Direct part is urgent, I will obtain applicable approvals on the PREQ and call U Svs. Purchasing at 6-8759 to expedite order processing.
## Four Part Categories in FM

<table>
<thead>
<tr>
<th>Category</th>
<th>What it means</th>
<th>How it is different in the SW than in ZN₄</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cataloged</strong></td>
<td>It is listed in COMPASS with a six digit part number, description, etc. It can be queried on the Part Search screen.</td>
<td>There are over 18,000 parts listed in ZN₄’s catalog. There are typically less than 500 parts listed in a SW catalog.</td>
</tr>
<tr>
<td><strong>Stocked</strong></td>
<td>A part that is stocked in a bin in the warehouse (NOTE: the quantity on hand may be 0 as a re-ordered has been filled yet).</td>
<td>No difference</td>
</tr>
<tr>
<td><strong>Non-Stocked</strong></td>
<td>A cataloged part that is not physically stocked in the warehouse (bin = ORO)</td>
<td>There are NO non-stocked parts listed in a SW.</td>
</tr>
<tr>
<td><strong>Non-Cataloged</strong></td>
<td>A part that isn’t listed in COMPASS at all.</td>
<td>Non-cataloged parts cannot be directly ordered from a SW. Non-cataloged parts can ONLY be purchased by listing ZN₄ as the warehouse on the Purchase Requisition (PREQ) form. How to do this is explained later in this document.</td>
</tr>
</tbody>
</table>
## Three Types of Parts in SW

<table>
<thead>
<tr>
<th>Type</th>
<th>Definition</th>
<th>Employee Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Consumable</strong></td>
<td>Parts that are physically stocked in the SW but are not easily assignable to one work order (i.e. safety gloves/goggles, pack of towels, can of lubricant, etc).</td>
<td>Complete ISSUE REQUEST, issue against satellites consumable WO.</td>
</tr>
<tr>
<td><strong>Stocked Part</strong></td>
<td>Parts that are physically stocked in the SW and are typically used on a single work order.</td>
<td>Complete ISSUE REQUEST, issue against the open WO you are working.</td>
</tr>
<tr>
<td><strong>Free Draw</strong></td>
<td>Nuts and bolts that aren’t tracked against a WO.</td>
<td>Use parts as needed, no tracking required.</td>
</tr>
</tbody>
</table>
All Parts I Need are in my SW

Situation: You access the SW, search the bins and locate all the parts you need.

Actions prior to leaving SW:

- At computer in SW, open COMPASS, ISSUE REQUEST form
- Warehouse Field = SXXX, defaults to your main SW, if you are in a different one then you must change this field
- WO Number = enter the WO number you are working
- Pick Up Date = enter in date (write TOD for todays date)
- Fill out Material Detail with all parts taken and quantity
- Click Submit
- Use parts
All Parts I Need are in my SW

<table>
<thead>
<tr>
<th>Part Number</th>
<th>Description</th>
<th>Status</th>
<th>MSDS U/M</th>
<th>Requested Qty</th>
<th>Requested Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>045730</td>
<td>GLOVE, DISPOSAL NITRILE/TNT BLUE/MEDIUM/POWDER F</td>
<td></td>
<td>BOX</td>
<td>1</td>
<td>7.5475</td>
</tr>
<tr>
<td>045734</td>
<td>GLASSES, SAFETY CLEAR</td>
<td></td>
<td>EA</td>
<td>1</td>
<td>5.0796</td>
</tr>
<tr>
<td>021415</td>
<td>DOOR CLOSER, LCN-4011 SERIES/ADJUSTABLE/RH REGAL</td>
<td></td>
<td>EA</td>
<td>1</td>
<td>189.5000</td>
</tr>
<tr>
<td>021562</td>
<td>SOLDIER, COP-PCS/GRZE/STA-SIL 15X10 0.0050 INCH</td>
<td></td>
<td>EA</td>
<td>2</td>
<td>4.2000</td>
</tr>
<tr>
<td>020383</td>
<td>WIRE, BUILDING-ELECT#12/STRAND/THHN/BLACK</td>
<td></td>
<td>FT</td>
<td>50</td>
<td>5.4631</td>
</tr>
<tr>
<td>020278</td>
<td>PIPE, COPPER-HARDO 75X10/101</td>
<td></td>
<td>LGTH/10</td>
<td>1</td>
<td>21.6000</td>
</tr>
</tbody>
</table>

Total: 233.5905
Some or All Parts I Need are in the Central Warehouse (ZN4)

Situation: You access the SW and can’t find all the parts you need but after searching ZN4’s catalog in COMPASS find everything you need.

Actions:

- Recommended that you request all parts needed from ZN4. If you take parts from the SW and request others from ZN4 then you must complete 2 Issue Requests: 1 for parts taken from your SW; and 1 for parts requested from ZN4.
- Additional information is required on the Issue Request for parts requested from ZN4
  - Warehouse = ZN4
  - WO Number = WO you are working
  - Pick Up Date = Date parts are needed (if emergency, call 6-5000 for assistance)
  - Instructions = enter in delivery instructions, list location (SXXX or specific bldg – room you want parts delivered to) and your contact info (name, cell phone number)
  - Material Detail = parts you are requesting and quantities
  - Click Submit and write down MDOC number for future reference
  - Parts ordered by 3:30pm will be delivered the next business day by 7:30am
Some or All Parts I Need are in the Central Warehouse (ZN4)
Parts I need are not in the COMPASS Catalog

Situation: Some parts I need are not in my satellite nor in ZN4’s catalog

Actions:

- Complete Issue Request(s) for parts that are in SW or ZN4 and complete a Purchase Request form for parts that need to be ordered.
- See the next three slides on how to complete a Purchase Request
Parts I need are not in the COMPASS Catalog

Completing a Purchase Requisition form for parts not in the COMPASS catalog

Log into COMPASS and access the Purchase Requisition form. In the description area enter in WO number, building number and a brief description. Using this suggested standard makes finding your specific PREQ easier in the future if you misplace the PREQ number.
Parts I need are not in the COMPASS Catalog

Completing a Purchase Requisition form for parts not in the COMPASS catalog

Log into COMPASS and access the Purchase Requisition form.
1. In description area, enter in WO number, building number and a brief description.
2. Purchase Type = select Inventory
3. Status defaults to Requested
4. Drop Ship is to be left blank
5. Deliver To: write name, cell phone number and specific delivery instructions if not your default SW
6. Click Add Line to enter part details
Parts I need are not in the COMPASS Catalog

Completing a Purchase Requisition form for parts not in the COMPASS catalog

1. Date Required: Enter date you and vendor agreed to in terms of delivery date
2. WO Number: Enter the WO you are working
3. Warehouse: ZN4
4. Part Number: Direct
5. Vendor No: Enter it if known, otherwise search for the vendor by clicking on the vendor No button. If the vendor is not listed then the PREQ form cannot be used.
6. Manufacturer: Enter if known
7. Description: After you enter Direct in the part number, the description field is filled in with a template that you should use to document what it is that is being purchased.
8. UOP: EA is what is most often selected
9. Quantity: Enter the quantity you are purchasing
10. Unit Price: Enter in unit price
11. Click OK

If you are ordering additional parts from this vendor then repeat these steps for all parts being ordered. If parts are needed from different vendors then additional PREQs must be completed (one PREQ for each vendor).
Requesting Changes to Parts in my SW

Complete a Part Change Request form. Forms are located in the SW and on-line via the FM website, employee tab, and then selecting forms.

http://www.facm.umn.edu/employees/forms/index.htm
See the FM Employee Training for more information on Issue Requests and Purchase Requests. Accessible via the FM Website >> Employees >> Training

COMPASS training is offered in two formats:
- UM Connect Training is an on-line ‘video’ where you listen and watch how to perform COMPASS tasks.
- COMPASS Quick Start is PowerPoint presentations.