SHORTAGE

User guidance

Contents

1. General

"SHORTAGE" sub-module collects all part order requests (POR), thar were made in other modules, such as Part M, Line Maintenance, Base Maintenance, also from Work Shop.

1. To begin to operate this sub – module click on the "Shortage" button.

2. Shortage Materials, Transfer to Quotation, Transfer to Purchaser Order.

1. On the "Shortage Materials" screen use different filters to find any created POR quickly:

- Filter P/N – filter for Part Number
- Filter NO – filter for Shortage Number
- Reference – filter for Shortage Reference
- Group – filter for User Group
- Subject – filter for Shortage Reference Subject
- Ship To – filter for User Group
- Used – filter for Shortage Used For
- Num – filter for Shortage Used For Number

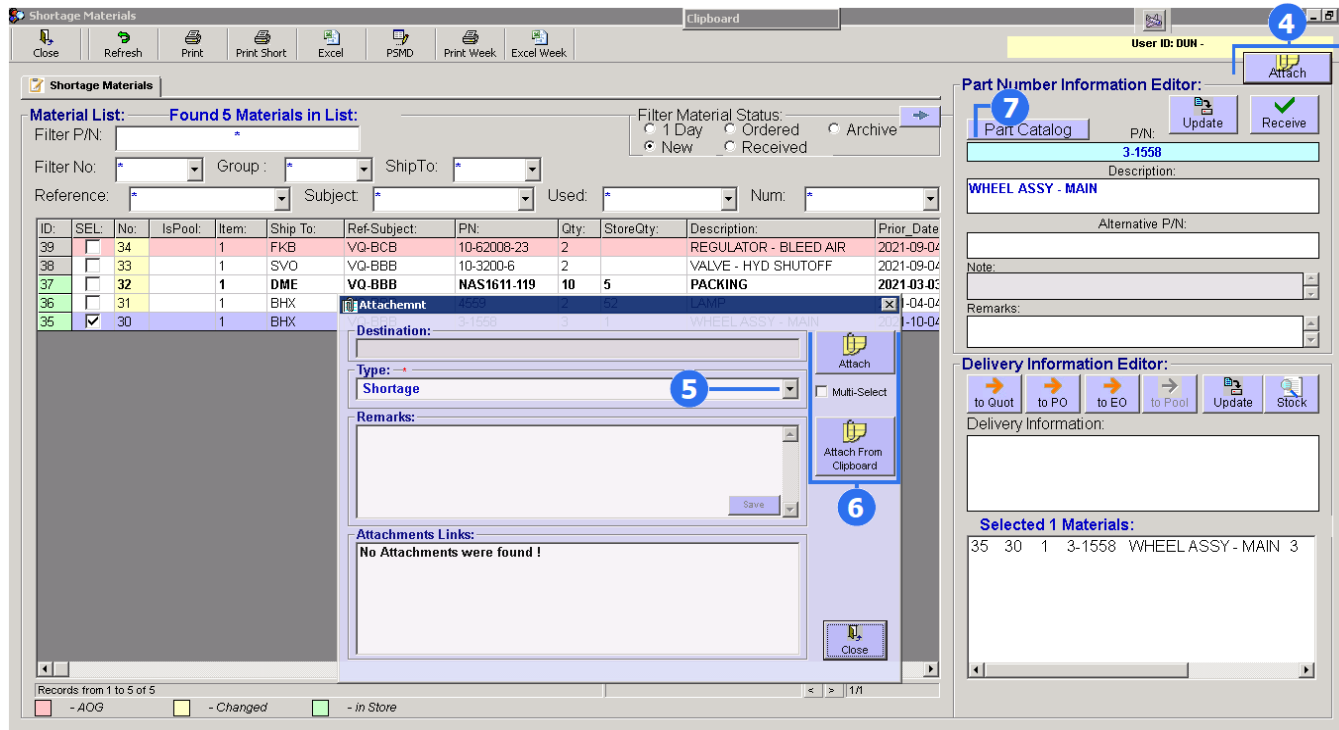2. All PORs in the "Material List" is divided in colours:

- Green – component is in store
- Red – AOG status
- Yellow–there was change of component quantity in orders.

3. Select and check box a line.

4

4. Press "Attach" to attach any documents.

5. Select type of document.

6. Press "Attach" button and find a document in your computer. Check box "Multi-Select" field to attach few documents. Press "Attach From Clipboard" to paste a document from clipboard.

7. If the component is not registered in the "Material Management" submodule in the "Spare Parts" tab, press "Part Catalog" button in the "Part Number Information Editor" and fill out all necessary component information. See "Material Management" manual.

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8. In "Part Number Information Editor" you can change information, for example part number, or add additional data in the other fields such as "Alternate P/N", "Note" and "Remarks".

8.1. To save the data click on the "Update",

8.2. If ordered component is in store (green line) press "Receive" button.

9. In "Delivery Information Editor" push on the "to Quotation" button.

10. "Done" screen will open. This means, that quotations were added successfully. "Yes" button allows you to transfer to "Quotation" module. "No" button closes the "Done" screen.

11. Click on the "to PO" to create purchase order here, in the "Shortage Materials" submodule.
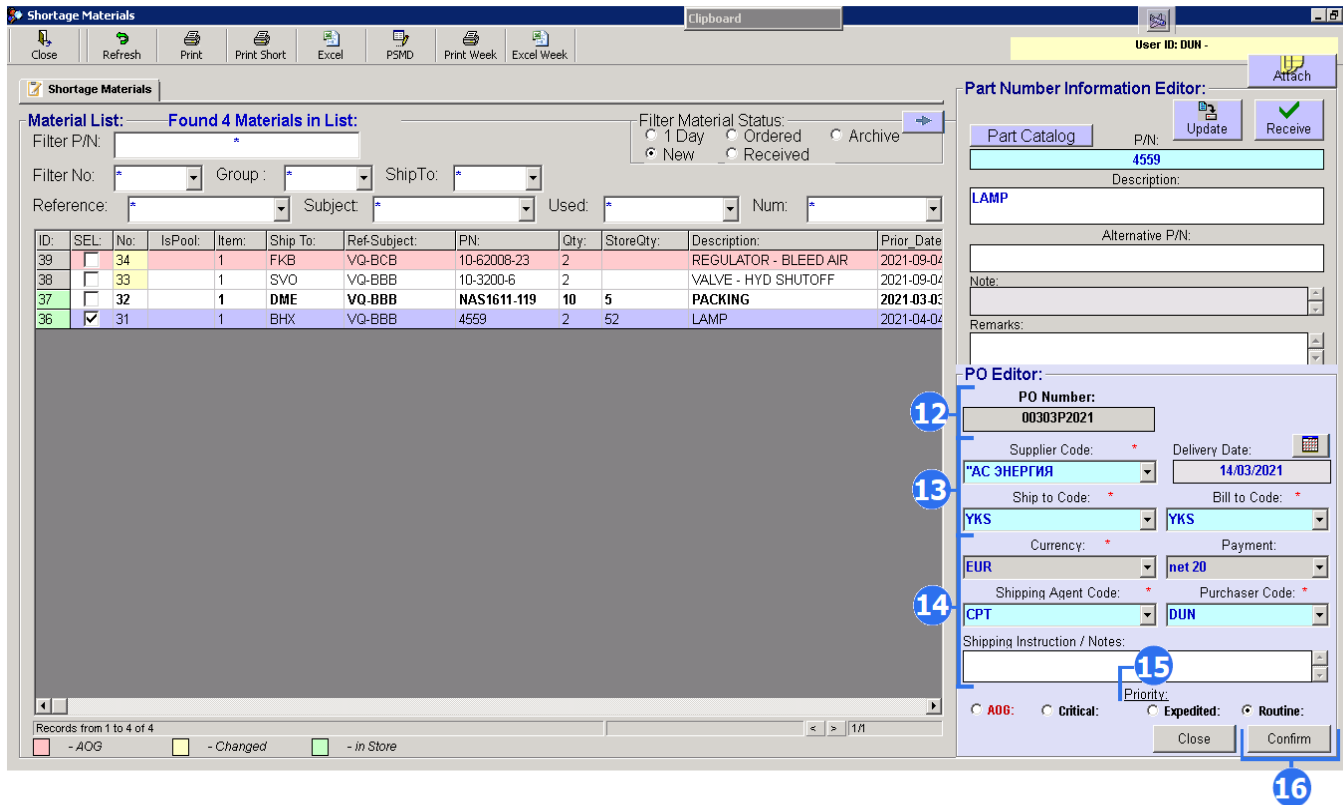
12. PO Number will automatically appear.

13. Select Supplier code, Ship to Code and Bill to Code. Set Delivery date.

14. Choose Currency and Payment. Select from combo box Shipping Agent Code and Purchaser Code. Also, if it is necessary, enter any notes.

15. Tick priority such as:

- AOG
- Critical
- Expedited
- Routine

16. Press "Confirm" button to transfer selected item to Purchase Order.

After this action, the line will be absent in the "Material List". This shortage will have the status "Ordered".

17. Use Filter Material Status. Check box "Ordered" field.

18. Look for your shortage from the whole list. Select and highlight it.

19. In the Store PN and Delivery Editor make any necessary changes. For example, change delivery date in the "Delivery Information" field.

19.1. After pressing "Update" you can monitor delivery date and PO number in the "Shortage Registration" (this submodule is in the Part M, Line Maintenance, Base Maintenance). Look at the "Shortage Materials Item List" and find "OrderNum" column.

20. Do not remember to press "Update" button to save changes.
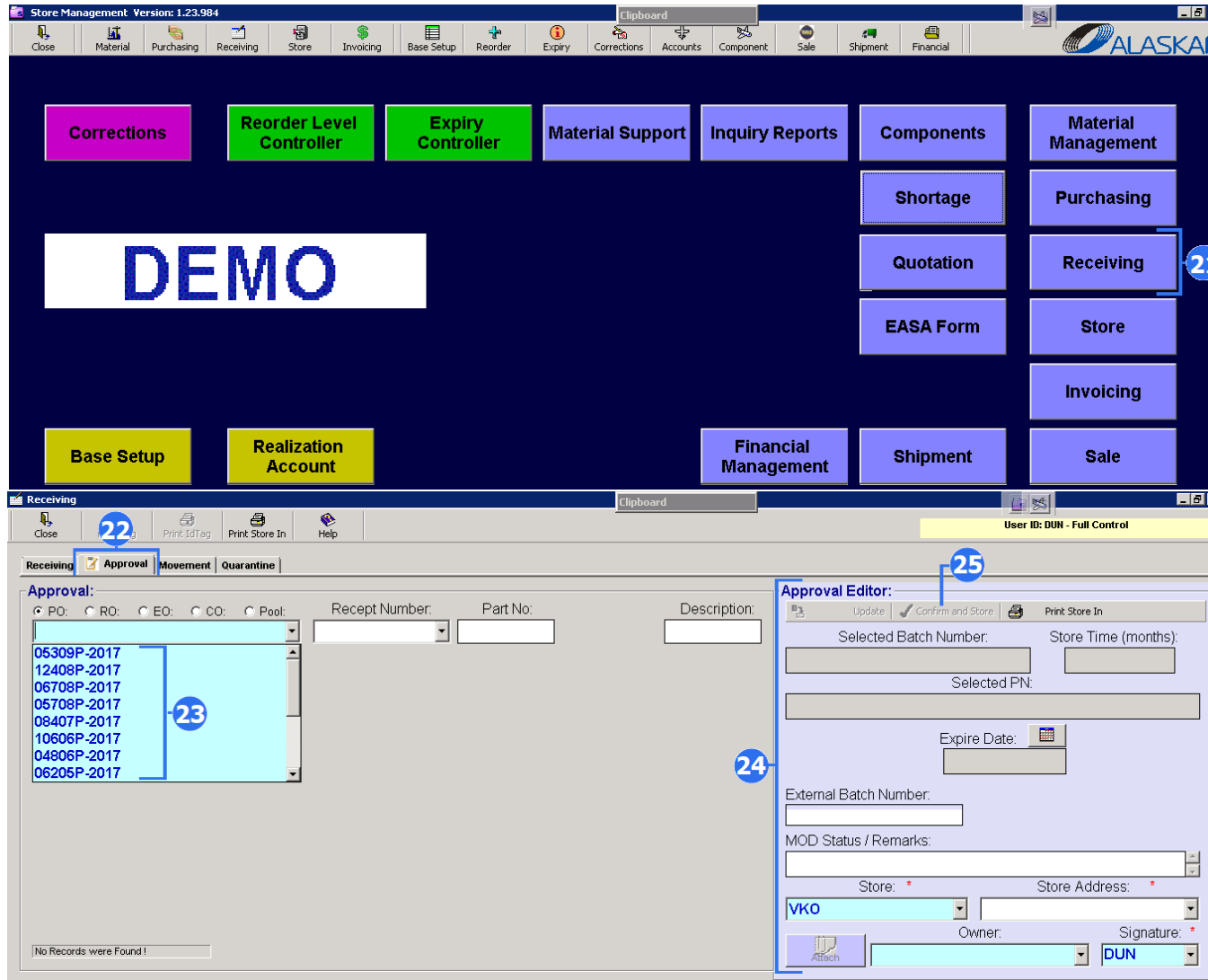
21. This order, made for the created shortage, can be approved in the "Receiving" submodule. Press "Receiving" button on the initial screen of the "Stock" module.

22. Select "Approval" tab.

23. Check box "PO" field and choose from combo box necessary PO number.

24. In "Approval Editor" fill out all fields.

25. Push "Confirm and Store" button to approve the component.

Now, you can make sure that this shortage has passed to the "Received" status in the "Shortage" submodule of the "Stock" module.

26. For this you need to use "Filter Material Status". Check box "Received".

27. From the whole list select and highlight corresponding line.

28. In "Store PN and Delivery Editor" make a change if it is necessary.

29. Click on the "Update".

30. "Store Receiving Information Editor" allows you to change data such as quantity, user ID and date.

31. Without fail press on the "Receive" button to save a change.

32. To remove a line, press "Delete". The line will disappear. This means that this Shortage has moved from the "Received" status to "Ordered" status.

33. Check box "Ordered" field to see list ordered shortages.

34. Highlight your line.

35. In the "Store Receiving Information Editor" add or change data and click on the "Receive" button. After this action, the line will be absent in the "Material List". This shortage will have the status "Received".

36. To remove the line click on the "Delete". The line will disappear. This means that this Shortage has moved from the "Ordered" status to "New" status.

3. Transfer to Exchange Order.

1. Use "Filter Material Status". Check box "New".

2. Select and tick the line.

3. In the "Delivery Information Editor" click on the "to EO" to create exchange order here, in the "Shortage Materials" submodule.

4. Select quantity. In this example there are two e.a. because in the "Material List" in the "Qty" column there are two e.a.

5. EO Number will automatically appear.

6. Select Supplier code, Ship to Code and Bill to Code. Set Delivery date.

7. Choose Currency and Payment. Select from combo box Shipping Agent Code and Issued By. Also, if it is necessary, enter any notes.

8. Tick priority such as:

- AOG
- Critical
- Expedited
- Routine

9. Press "Confirm" button to transfer selected item to Exchange Order.

After this action, the line will be absent in the "Material List". This shortage will have the status "Ordered".

NOTE: Since in our example, out of two components, the exchange order was placed only for one component, one will remain in the "New" status and the other will change to the "Ordered" status.

10. Use Filter Material Status. Check box "Ordered" field.

11. Look for your shortage from the whole list. Select and highlight it.

12. In the "Store PN and Delivery Editor" make any necessary changes. For example, change delivery date in the "Delivery Information" field.

12.1. After pressing "Update" you can monitor delivery date and EO number in the "Shortage Registration" (this submodule is in the Part M, Line Maintenance, Base Maintenance). Look at the "Shortage Materials Item List" and find "OrderNum" column.

13. Do not remember to press "Update" button to save changes.

14. This order, made for the created shortage, can be approved in the "Receiving" submodule. Press "Receiving" button on the initial screen of the "Stock" module.
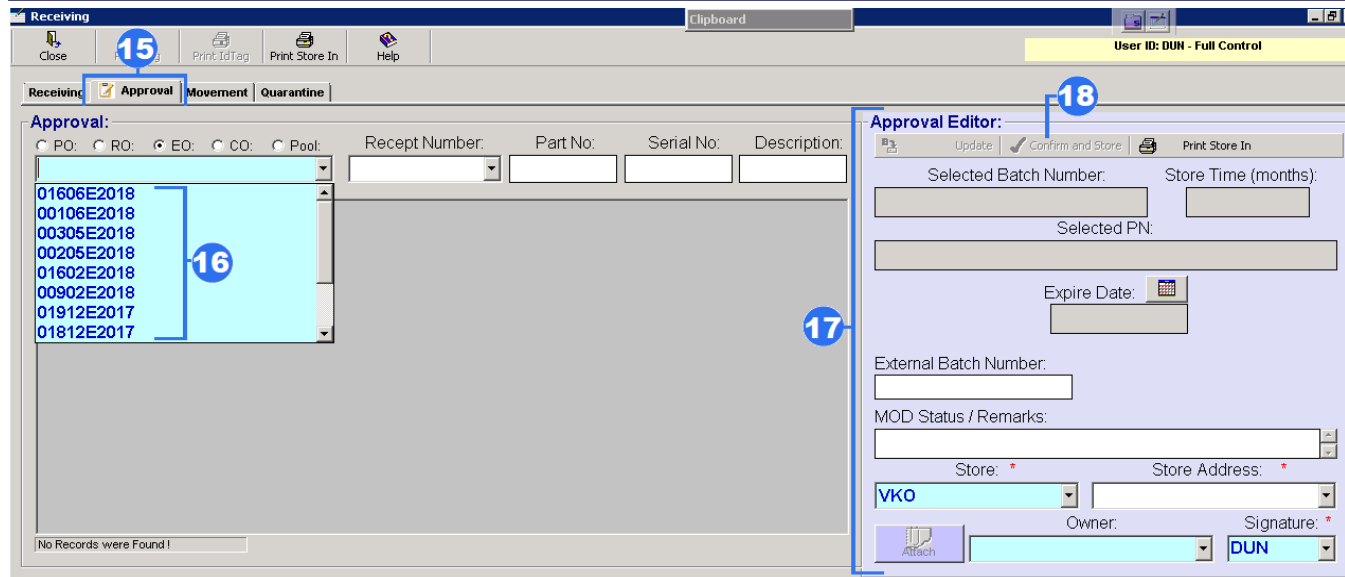
15. Select "Approval" tab.

16. Check box "EO" field and choose from combo box necessary EO number.

17. In "Approval Editor" fill out all fields.

18. Push "Confirm and Store" button to approve the component.

Now, you can make sure that this shortage has passed to the "Received" status in the "Shortage" submodule of the "Stock" module.

19. For this you need to use "Filter Material Status". Check box "Received".

20. From the whole list select and highlight corresponding line.

21. In "Store PN and Delivery Editor" make a change if it is necessary.

22. Click on the "Update".

23. "Store Receiving Information Editor" allows you to change data such as quantity, user ID and date.

24. Without fail press on the "Receive" button to save a change.

25. To remove a line, press "Delete". The line will disappear. This means that this Shortage has moved from the "Received" status to "Ordered" status.

26. Check box "Ordered" field to see list ordered shortages.

27. Highlight your line.

28. In the "Store Receiving Information Editor" add or change data and click on the "Receive" button. After this action, the line will be absent in the "Material List". This shortage will have the status "Received".

29. To remove the line click on the "Delete". The line will disappear. This means that this Shortage has moved from the "Ordered" status to "New" status.

4. Transfer to Pool Order.

1. Use "Filter Material Status". Check box "New".

2. Select and tick the line.

3. In the "Delivery Information Editor" click on the "to Pool" to create pool order here, in the "Shortage Materials" submodule.

4. Select quantity. In this example there are two e.a. because in the "Material List" in the "Qty" column there are two e.a.

5. Pool Order Number will automatically appear.

6. Select Supplier code, Ship to Code and Bill to Code. Set Delivery date.

7. Choose Currency and Payment. Select from combo box Shipping Agent Code and Issued By. Also, if it is necessary, enter any notes.

8. Tick priority such as:

- AOG
- Critical
- Expedited
- Routine

9. Press "Confirm" button to transfer selected item to Pool Order.

After this action, the line will be absent in the "Material List". This shortage will have the status "Ordered".

10. Use Filter Material Status. Check box "Ordered" field.

11. Look for your shortage from the whole list. Select and highlight it.

12. In the "Store PN and Delivery Editor" make any necessary changes. For example, change delivery date in the "Delivery Information" field.

12.1. After pressing "Update" you can monitor delivery date and pool order number in the "Shortage Registration" (this submodule is in the Part M, Line Maintenance, Base Maintenance). Look at the "Shortage Materials Item List" and find "OrderNum" column.

13. Do not remember to press "Update" button to save changes.
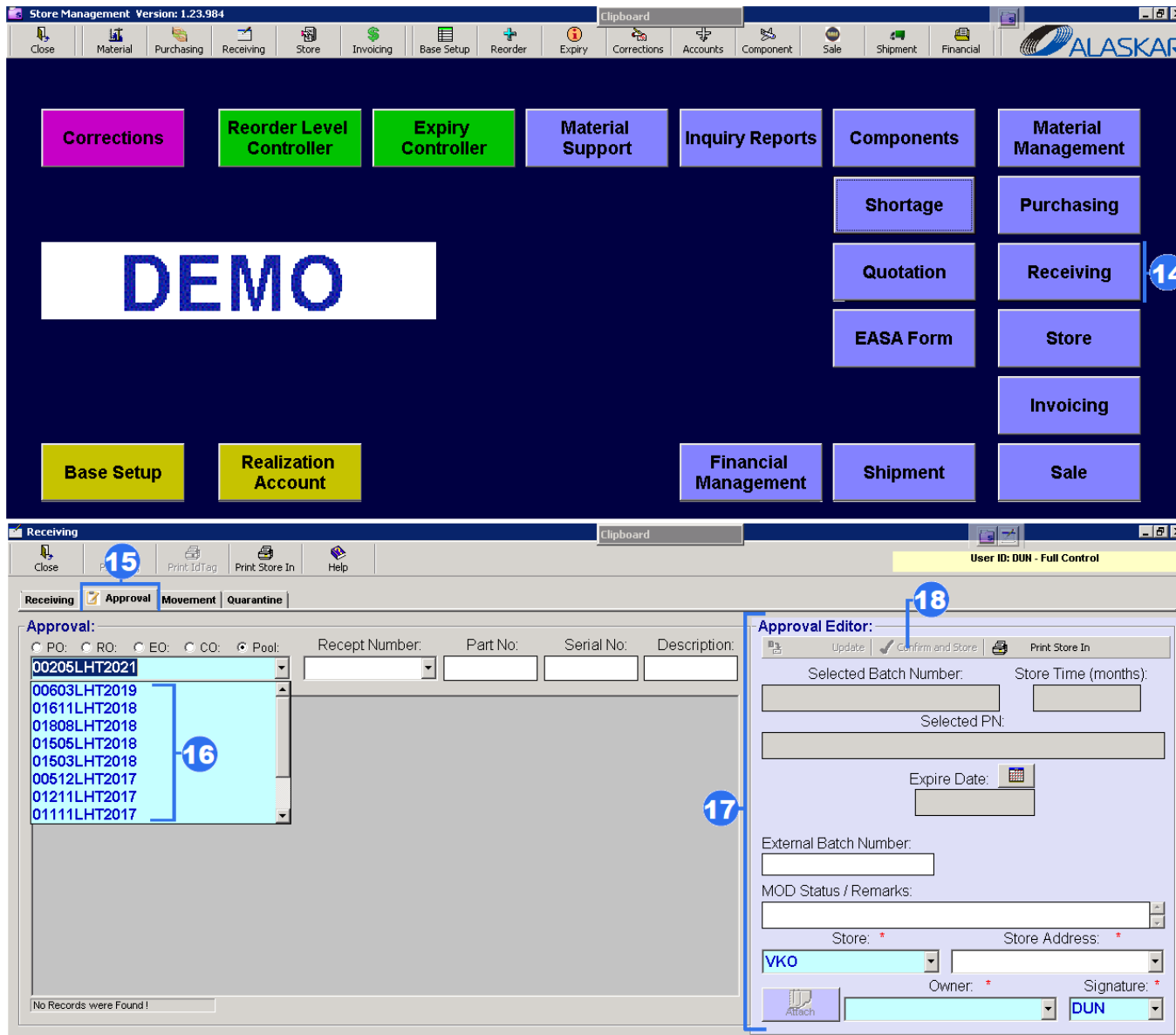
14. This order, made for the created shortage, can be approved in the "Receiving" submodule. Press "Receiving" button on the initial screen of the "Stock" module.

15. Select "Approval" tab.

16. Check box "Pool" field and choose from combo box necessary Pool order number.

17. In "Approval Editor" fill out all fields.

18. Push "Confirm and Store" button to approve the component.

Now, you can make sure that this shortage has passed to the "Received" status in the "Shortage" submodule of the "Stock" module.

19. For this you need to use "Filter Material Status". Check box "Received".

20. From the whole list select and highlight corresponding line.

21. In "Store PN and Delivery Editor" make a change if it is necessary.

22. Click on the "Update".

23. "Store Receiving Information Editor" allows you to change data such as quantity, user ID and date.

24. Without fail press on the "Receive" button to save a change.

25. To remove a line, press "Delete". The line will disappear. This means that this Shortage has moved from the "Received" status to "Ordered" status.

26. Check box "Ordered" field to see list ordered shortages.

27. Highlight your line.

28. In the "Store Receiving Information Editor" add or change data and click on the "Receive" button. After this action, the line will be absent in the "Material List". This shortage will have the status "Received".

29. To remove the line click on the "Delete". The line will disappear. This means that this Shortage has moved from the "Ordered" status to "New" status.

5. Access to Stock and printout.

1. In "Delivery Information Editor" press "Stock" button and "Main Store" screen will appear. Here you can get data of component availability.

2. Use Filter - Part Number to find a component quickly. Also, you can enter part numbers separated by semicolons for multi-selection.

3. Use "Description" field for more accurate component retrieval.

4. In the list you can see information such as "Store Address", "Store", "Quantity" and other data.

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5. On the upper toolbar press "Refresh" button to clear all fields and remove all check boxes.

6. Use "Print" to print out Material list.

7. To print corresponding shortage (POR – part order request), highlight it and push on the "Print Short"

8. "Excel" button allows you to transfer all shortages to excel.

9. Select "Print Week" to print out shortages for the period. Select "Excel Week" to transfer shortage for the period.

10. Enter "From Date" and "To Date" and press "Confirm".