Stockroom –

1. The landing page should have links to the other pages and should show all items needing ordered and should have open order requests listed. (Will require 2 different scrollable lists. One for each list.) Items that are newest should be on top.

Listings for order requests should just show a list of order request numbers, work order numbers, status, worker requesting, date of last status update. If the Order Request number is clicked on the order request should open.

1. List of inventory with searchable boxes at the top – the searchable boxes should be manufacturer, manufacturer part number, stock inventory number, description of part, number of parts on hand, number of parts on reserve.

Listing should be in a scrollable box. Each line should list the Stock Inventory number, the Manufacturer, Manufacturer part number, Description, Available on hand and reserved. The stock Inventory number should be selectable to allow it to be opened on another screen.

1. Page allowing listing of information on part. This will show all of the information on hand for the part. Could also include a listing of all variants it is related to. Should make sure it lists the on hand and on reserve numbers. Display if an order has been placed for this part and when it is expected.
2. Order Requests listing – Allow search to look for status, work order number, person placing order. Will be same as on landing page but will take up whole page and will allow person to search order requests. (Order requests can be manually requested or be auto generated by a work order.)
3. Enter / edit/display Order Request allowing listing of information for order request. This page will show an order request and will populate it depending on how it was selected. If it is new, then the page will be blank and all fields will have to be added. If it is an existing order request, then the page will be filled in from that original order request. If it is from a work order, then the heading information will be copied from the work order and the parts list will be populated from the work order if a job plan was used and the worker selected the requested parts on the work order. Once populated the order lines will be able to be added or edited as needed. Once the Order Request is closed no further editing will be available.

The order lines will contain the information about the part requested. This will include the Manufacturer of the part, the Manufacturer part number, the stock room ID number and the number of parts requested as well as a description if needed. As long as the order request hasn’t been closed additional lines can be added or current ones edited as long as the line has not been checked out yet.

If the item doesn’t have a Stock room ID number, it will be considered a special order item.

At the bottom of the order request page will be a variation of the “List of inventory with searchable boxes at the top” page. The main difference is that the items will have an “add” button to allow them to be added to the order request. The on reserve number is not necessary but otherwise the rest of the information should be listed.

Custom orders will be selected by Manufacturer and the parts number selected. If not in the system, then the information needs to be entered into the description field.

1. Make order page – This is for replenishing on hand stock or for special orders.

Show a listing of parts needing ordering. When selecting a part have it show a list of suppliers and pricing if known. The ability to add suppliers to the list and the ability to adjust pricing should also be available to update values as they change. To make an order select the supplier to order from and it will open an order for that part from that supplier. The order should contain the contact information for that supplier.

1. Parts checkout listing – When a part is checked out we need to track who checked out the part, the time/date they checked it out, how many, work order if known and asset associated with if any. This can be done automatically from a work order or order request but must be done manually if the person checks out items at the counter without a work order. (Such as mop or paper towels). This page is intended to show all checkouts. It should only be available to stockroom personnel and supervisors. (May not be in the model yet and need to be added. Will look at and try to add to model before migrating database)

Notes:

Landing page is intended to show status of parts requests and orders for stockroom employees and anyone else interested. We do newest first so that the stockroom clerk can check for new requests so they don’t get hidden at the bottom. We may want to allow an option to only show items depending on the permissions of the person logging in. The stockroom person will see all open orders, a non-stockroom, non-admin worker will just see the ones relating to orders they placed, and admins only seeing those requests needing approval.

Inventory listing page is intended to allow someone to search the stockroom for a particular part. The starting page is to list all parts available and the search boxes allow the person looking to narrow down the parts. The part info page is intended to be opened from this page so the ID as a link to open the page makes the best sense but if there is room you could provide an Icon instead but this is wasted “landscape” that could be used to display the items.

The page showing the parts information is there to allow the person to see all the details about the part in question. People with stockroom permissions and stockroom supervisor should be able to adjust on hand inventory so if someone takes inventory without checking it out or for some other reason the numbers don’t match they can be adjusted. Non-stockroom personnel should NOT have this ability.

Order request listing should show all non-closed order requests to stockroom or supervisors but other workers should only see those that they have placed. This allows affected employees to see the status of order requests or allow supervisors/stockroom personnel to review all of them. Should have an option to allow viewing of closed orders as well but not default to viewing them so history can be checked if necessary.

Order request form is intended to be flexible for the worker to be able to request any part they need. A work order with a job plan will provide most of the parts listing but the intended design is to allow additional parts to be added since no two jobs are always the same and other items can be broken by accident. The intended work method is that workers will fill out order requests for all parts but they could instead go to the stockroom and not know what parts they need and need to look at them to know for sure. In these cases, there won’t be an order request and the parts will just be checked out.

Make order page – this page is intended to allow the stockroom person to create an order to get new items and may contain inventory items (things in the stockroom) or non-inventory items (Things not in the stockroom) which are special order items. For best flexibility, attempts will be made to allow the stockroom clerk to choose a preferred supplier for a part and create the orders automatically. These orders then can be printed out so they can be placed manually if necessary or can be kept on screen so the clerk can call the supplier. Eventually this page will be hopefully emailed to the supplier automatically upon approval (Will require a complicated new system to handle responses as well)

Parts checkout page. This is intended to allow tracking of parts being checked out, who is getting them and for what jobs or equipment they are being used for to track costs and be able to audit such checkouts to insure parts are used as intended.

Checkouts (Worker gets an item) and check-ins (New items arrive) need to be setup so they can be done from the info page or the index as well as from the order requests or order pages for best flexibility.