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User Guide

F12 Key Partial Part Search

CI-PART

Notes

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Notes

Introduction

The F12 Key Partial Part Search program provides an enhanced version of the search feature in the ADP Parts Invoicing application. You can use it to look up parts by number or by description, including partial-match searches and secondary-keyword searches.

The F12 Key program runs inside your Parts Invoicing function **I** and allows you to select a quantity of available parts for the current invoice. The CI-PART program is an independent application that provides similar functionality, for lookup purposes. Both operations are described in this *User Guide*.

F12 part searches in both CI-PART and Parts Invoicing function **I** display MEMO parts that match the search criteria.

The F12 Key Partial Part Search package also includes a setup routine that allows you to choose which price data elements you want to include in the search results listing.

System Requirements

F12 Key Partial Part Search runs on ADP systems with PS950 or higher.

Overview

This guide provides information for accessing, setting up, and using the features of the F12 Key Partial Part Search application.

Navigation

- Make sure that the Caps Lock feature is on.
- After typing data into a field, press **Enter** to move to the next field.
- Use **F1** to view the extensive online help.

Setting Up the F12 Key Partial Part Search

Use the **CI-PART-SETUP** program to select the Parts database price fields that you want to display when looking up parts in CI-PART or function I using the enhanced F12 command key.

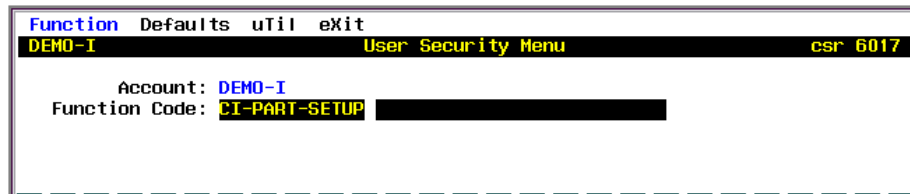


Figure 1. F12 Key Partial Part Search Setup Routine

To set up the F12 Key program:

1. Log on to your Parts Inventory (*name-I*) application account.
2. At the Function Code prompt, enter **CI-PART-SETUP**.

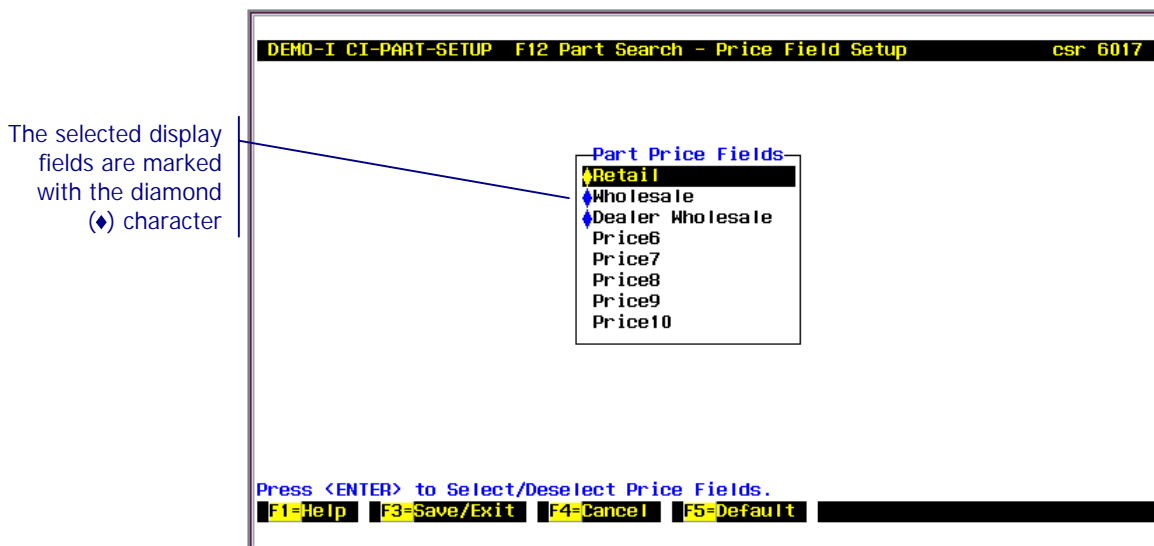


Figure 2. Price Field Setup Screen

3. Use the arrow keys to move to the field name(s) you want to select for the CI-PART and function I search display, and press **Enter** to flag the field (or to clear the flag on the field). You can select up to three fields.

Note. If you clear all the selections in this window, the search results window will not display any price data.

4. To save the field selections, press **F3=Save/Exit**.

To cancel the changes you made and return to the Function Code prompt, use the **F4=Cancel** command key.

To revert to the default settings in this screen (Retail, Wholesale, and Dealer Wholesale price fields), press **F5=Default**.

Looking Up Parts with the CI-PART Routine

Use the **CI-PART** function code to perform Parts database inquiries independent of the Invoicing (I) function on your Parts application account, and to maintain the set of searchable description keywords in your Parts file.

The two maintenance options on the CI-PART menu are described in *Maintenance Routines in CI-PART* on page 11.

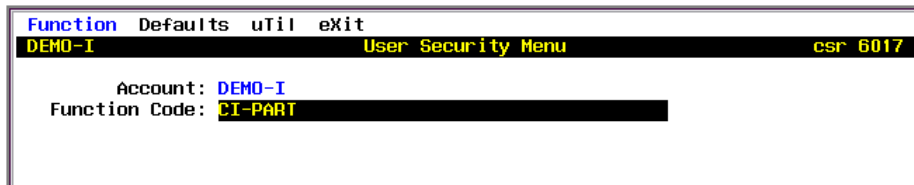


Figure 3. CI-PART Function Code

You can perform searches on your database either by part number or by part description. Both methods support partial-string matches on the field value you enter.

Searching By Part Number

To make inquiries on your Parts database based on a complete or partial part number:

1. Log on to your Parts Inventory (*name-I*) application account.
2. At the Function Code prompt, enter **CI-PART**.

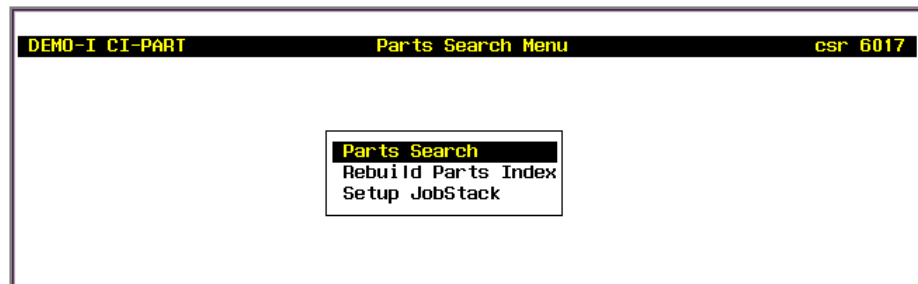


Figure 4. F12 Key Partial Part Search - CI-PART Menu

3. Select the **Parts Search** option.

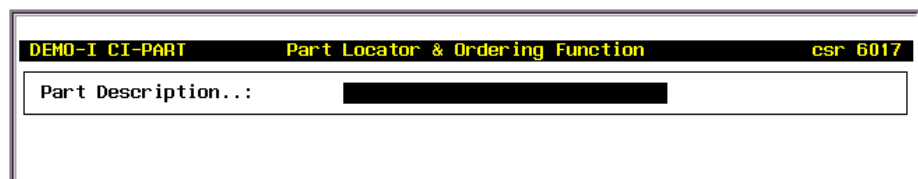


Figure 5. Part Search Field

4. To search by number, simply type an equals sign (=) at the beginning of your search string, and then type the numbers (all or partial) for the part you want to find.

DEMO-I CI-PART		Part Locator & Ordering Function			csr 6017
Part-No	Description	Retail	Whlsl	D-Whl-O.H.	Qty
15595206	CLAMP ASM	10.84	8.13	6.01	22
20691-19B00	GASKET-EXH	1.83	0.00		23
20691-30P00	GASKET	2.54	0.00		31
20692-65J00	GASKET-CAT	7.57	0.00		19
DA20691-19B00	GASKET	1.83	0.00		66

Enter Quantity to Order or press Arrow Keys for next item.

F1=Help F3=Exit F5=Parts F6=Clear F8=Extensive Search SF11=>

Figure 6. Part Search Example - Search on '=206'

The program displays all parts in your database that contain the numeric string in the part number field. MEMO parts also appear in the display, with the word 'MEMO' in the Parts On Hand (O.H.) column.

- To continue, see *CI-PART Search Results Commands* on page 5.

Searching by Part Description

To make inquiries on your Parts database based on text (complete or partial words) in the part description:

- Log on to your Parts Inventory (*name-I*) application account.
- At the Function Code prompt, enter **CI-PART**.
- Select the **Parts Search** option.

DEMO-I CI-PART		Part Locator & Ordering Function			csr 6017
Part Description...: <input type="text"/>					

Figure 7. Part Search Field

- To search by description, enter the characters (letters or numbers) in the part description field.

The program first searches for complete-word matches on the string you enter at this field. If it finds no matches, the program prompts you to do an Extensive Search instead.

To extend your search so that it looks for the keyword you entered anywhere in the part description (not just a complete word separated from other words by a space), enter **Y** at the prompt.

DEMO-I CI-PART		Part Locator & Ordering Function			csr 6017	
Part-No	Description	Retail	Whlsl	D-Whl	O.H.	Qty
00013294	GASKET	9.18				14
20691-30P00	GASKET	2.54	0.00			31
3883369	GASKET	0.33	0.25			11
3958614	GASKET	3.81	2.91			6
6257218	GASKET V	0.21	0.32			4
9787664	GASKET	1.19	1.05			11
10128343	GASKET	0.53	0.39	0.29		14
12556887	GASKET	0.34	0.26	0.19		39
6V9890	KIT GASKET	122.08	109.88			11
9003005	GASKET	18.66	0.00			9
156595	GASKET	0.74	0.67			18
2356789	GASKET	7.00	6.50			6
2734553	GASKET	2.34	1.96			2
3974218	GASKET	19.75	17.88			25
6938740	GASKET	1.19	0.00			9
12356554	GASKET	145.67	109.25	80.75		5
12360462	GASKET KI	44.54	31.18	21.66		18

Enter Quantity to Order or press Arrow Keys for next item.
 F1=Help F3=Exit F5=Parts F6=Clear F8=Extensive Search SF11=>

Figure 8. Part Search Example - Search on 'GASKET'

- To continue, see *CI-PART Search Results Commands* below.

CI-PART Search Results Commands

The Part Search results screen provides several commands that let you narrow your search, review or change your selected parts quantities, or start over with a new inquiry.

Commands for **description** search types:

- By default, a description search finds parts in which the keyword entered in the Part Description dialog box is either the *first* segment of the description field value, or is a *complete word* in the description (separated from any other words with spaces). To expand the search so that the same keyword is found in any part of the description field value, press **F8=Extensive Search**.

The F8=Extensive Search feature finds keyword matches adjacent to any character, including commas, hyphens, and quotation marks

Part-No	Description	Retail	Whlsl	D-Whl-O.H.	Qty
00013294	GASKET	9.18			14
10101275	GASKET	1.09	0.82	0.60	10
10128343	GASKET	0.53	0.39	0.29	14
11193-15010	"GASKET, SPARK PLUG T"	7.27	7.27	6.25	26
11193-16010	"GASKET, SPARK PLUG T"	2.17	2.17	1.87	26
11213-20020	"GASKET, CYLINDER HEA"	13.10	13.10	11.25	25
11213-75030	"GASKET, CYLINDER HEA"	13.10	13.10	11.25	25
11214-20010	"GASKET, CYLINDER HEA"	13.10	13.10	11.25	66
12356554	GASKET	145.67	109.25	80.75	5
12360462	GASKET KI	44.54	31.18	21.66	18
12556887	GASKET	0.34	0.26	0.19	39
13294	GASKET		0.00		
154916	GASKET-HYDRAULIC PUMP	2.19	1.22	1.87	13
15970888	GASKET	3.89	2.92	2.16	55
154295	GASKET	5.37	4.83		14
156595	GASKET	0.74	0.67		18
20691-19800	GASKET-EXH	1.83	0.00		23

Enter Quantity to Order or press Arrow Keys for next item.
 F1=Help F3=Exit F5=Parts F6=Clear F8=Extensive Search SF11=>

Figure 9. Extensive Search Results

Note. The commands available after an extensive search are the same as those for a regular search.

- To limit a description search by more than one keyword, press **F10=Refined Search**, enter a second keyword, and press **Enter**. The program searches for the second keyword *within* the current search results listing to produce a smaller list.

Part-No	Description	Retail	Whlsl	D-Whl-O.H.	Qty
6V9890	KIT GASKET	122.08	109.88		11
7X2632	KIT GASKET	134.62	121.17		8

Enter Quantity to Order or press Arrow Keys for next item.
 F1=Help F3=Exit F5=Parts F6=Clear F8=Extensive Search SF11=>

Figure 10. Refined Search Results

In this example, the 'GASKET' search results have been refined with the keyword 'KIT' to limit the search results to two entries.

You can refine a search results list more than once by using the F10 command again. Or, to begin again, use either the F8 command key (to expand the listing

with an extensive search for the original keyword), or the F5 command key (to start over with a new keyword).

Commands for **description** and **part number** search types:

- To search for any text string in the current search results listing, use the F9=Search command key.
- To enter a quantity for an invoice, move to the applicable part line and type a numeric value in the Qty field.

DEMO-I CI-PART		Part Locator & Ordering Function			csr 6017	
Part-No	Description	Retail	Whlsl	D-Whl	O.H.	Qty
15595206	CLAMP ASM	10.84	8.13	6.01	22	6
20691-19B00	GASKET-EXH	1.83	0.00		23	
20691-30P00	GASKET	2.54	0.00		31	
20692-65J00	GASKET-CAT	7.57	0.00		19	
DA20691-19B00	GASKET	1.83	0.00		66	

Enter Quantity to Order or press Arrow Keys for next item.

F1=Help F3=Exit F5=Parts F6=Clear F7=Disp SF11=>

Figure 11. Entering Parts Quantities

To clear a quantity value, press **F6=Clear** on that parts line.

- The command key line changes to show new commands after a quantity value has been entered. To review the invoice, press **F7=Disp**.

PART SELECTION LIST						
Part-No	Description	Retail	O.H.	Qty		
11213-20020	"GASKET, CYLINDER HEA"	13.10	25	4	<Page 1 of 1>	

Figure 12. Display Parts Invoice

- To return to the Parts Search field to start another parts inquiry, press **F5=Parts**.
- To return to the previous screen, press **F3=Exit**.

Using the Enhanced F12 Key in Parts Function I

Use the F12=Search key in the Parts Invoicing screen (function I) to look up and select parts using similar functionality to that provided by the CI-PART command.

To use the enhanced part search function:

1. Log in to your Parts (*name-I*) application account and run the Parts Invoicing function.
2. Select an existing invoice, or create a new invoice.
3. Use the A command to add a part line, and enter the employee number as usual.

```

PORT 6017 DEMO-I          MODIFY INVOICE (I)          06JUL04 4:39
Invoice: 58155              Sale Type: CASH
Customer: 100032
Name: HARMAN,KEVIN          Parts: 1101.60
Address: 123 MAIN STREET    Freight: 0.00
City,St Zip: HOFFMAN ESTATES , IL 6019    Tax: 88.13
Main Phone: 8473971700      Total Invoice: 1189.73
Add'l Info: Y              Backorder Amount: 0.00
Emp 1 Salesperson          Ship Via          PO          B/L
PART-NO.....DESC.....O.H. BIN.....O.O. TRADE. LIST... Q.S. SALE... GPP
          100 TESTING          7          JDJJ          0.00 1000.00 1 1100.00 000
                   OPLL
                   000
          EOTZ*1001*Å GASKET    9          122          0.00 1.45 1 1.60 70

Page 1 2 parts

PART NO.

F1=Help F3=Save F4=Cancel F12=Search
    
```

Figure 13. Adding a Part to an Invoice

The program moves to the *Part No.* prompt at the bottom of the Invoicing screen.

4. Press F12=Search.

```

Part Description...: =206
Enter Full or Partial Part Desc or enter = for partial Part#
F1=Help F3=Exit
    
```

Figure 14. Part Description Dialog Box

5. To search by part number, simply type an equals sign (=) at the beginning of your search string, and then type the numbers (all or partial) for the part you want to find. The program displays all parts in your database that contain the numeric string in the part number field.

-OR-

To search by description, enter the characters (letters or numbers) in the part description field.

The program first searches for complete-word matches on the string you enter at this field. If it finds no matches, the program prompts you to do an Extensive Search instead. To extend your search so that it looks for the keyword you entered anywhere in the part description (not just a complete word separated from other words by a space), enter **Y** at the prompt.

```

PORT 6017 DEMO-I          MODIFY INVOICE (I)          06JUL04 4:39
Invoice: 58155           Sale Type: CASH
Customer: 100032
Name: HARMAN,KEVIN      Parts: 1101.60
Address: 123 MAIN STREET Freight: 0.00
City,St Zip: HOFFMAN ESTATES , IL 6019 Tax: 88.13
Main Phone: 8473971700 Total Invoice: 1189.73
Add'l Info: Y           Backorder Amount: 0.00
Emp 1 Salesperson      Ship Via      PO      B/L
PART-NO.....DESC.....O.H. BIN.....O.O. TRADE. LIST...O.S. SALE...GPP
Part-No Description Retail WhIsI D-WhI O.H. Qty
15595206 CLAMP ASM 10.84 8.13 6.01 22
DA20691-19B00 GASKET 1.83 0.00 66
20691-30P00 GASKET 2.54 0.00 31
20692-65J00 GASKET-CAT 7.57 0.00 19
20691-19B00 GASKET-EXH 1.83 0.00 23

Part Description... : =206

Enter Quantity to Order or press Arrow Keys for next item.
[F1]=Help [F3]=Exit [F6]=Delete Part [F8]=Extensive Search [F9]=Search [SF11]=>

```

Figure 15. Function I - F12 Part Search on '=206'

MEMO parts also appear in the display, with the word 'MEMO' in the Parts On Hand (O.H.) column.

6. The enhanced F12 search feature in function I provides many of the same commands in the search results window that are provided in the CI-PART routine. (For a list of commands, see *F12 Command Key Search Results Commands* on page 10.)
7. To select a part for the current invoice, move to the applicable part line and type a numeric value in the Qty field.
8. Press **F3=Exit** to close the search window.
9. Press **F3** again to return to the invoice screen.

The selected parts quantities are added to your invoice in progress

```

PORT 6017 DEMO-I          INVOICING (I)          06JUL04 5:00
Invoice: 58155             Sale Type: CASH
Customer: 100032
Name: HARMAN,KEVIN        Parts: 1161.20
Address: 123 MAIN STREET  Freight: 0.00
City,St Zip: HOFFMAN ESTATES , IL 6019 Tax: 88.13
Main Phone: 8473971700   Total Invoice: 1249.33
Add'l Info: Y            Backorder Amount: 0.00
Emp 1 Salesperson        Ship Via PO B/L
PART-NO.....DESC.....Q.H. BIN.....O.O. TRADE LIST... Q.S. SALE... GPP
-----
100 TESTING          7 JDJJ 0.00 1000.00 1 1100.00 000
15595206 CLAMP ASM  17 OPLL 8.13 10.84 2 11.92 93
EOTZ*1001*A GASKET  9 122 0.00 1.45 1 1.60 70
    
```

Page 1 3 parts

PART NO.

F1=Help F3=Save F4=Cancel F12=Search

Figure 16. Parts Invoicing Screen

10. Continue as usual with the Parts Invoicing process.

F12 Command Key Search Results Commands

The Part Search results screen within function I provides several commands that let you narrow or revise your search and select parts quantities.

- For description searches, you can expand the search to all instances of the search keyword (found in any part of the description field). Press **F8=Extensive Search**.
- To limit a description search by more than one keyword, press **F10=Refined Search**, enter a second keyword, and press **Enter**. The program searches for the second keyword *within* the current search results listing to produce a smaller list.
- To search for any text string in the current search results listing, press **F9=Search**.
- To clear the quantity value entered for a part in the search list, press **F6=Delete Part** at that parts line.

Maintenance Routines in CI-PART

The CI-PART menu contains two options that help you optimize the enhanced F12 search feature by building cross-references to the description field values in the Parts database.

Use the **Rebuild Parts Index** option after you install the F12 Key Partial Part Search application, and each time you update your Parts database.

Use the **Set Up Jobstack** option to add the Rebuild Parts Index command to the ADP Jobstack.

Rebuilding the Parts Index

To rebuild the cross-references to the Parts database:

1. Log on to your Parts Inventory (*name-I*) application account.
2. At the Function Code prompt, enter **CI-PART**.
3. Select the **Rebuild Parts Index** option. The program rebuilds the cross-references and returns you to the CI-PART menu.
4. Press **F3=Exit** to return to the Function Code prompt.

Setting Up the Rebuild Command in the Jobstack

To add the Rebuild Parts Index command to the ADP Jobstack:

1. Log on to your Parts Inventory (*name-I*) application account.
2. At the Function Code prompt, enter **CI-PART**.
3. Select the **Setup Jobstack** option.

```

DEMO-I CI-PART           Parts Search Menu           csr 6004

Use this routine to add the build program to your nightly JOB-STACK.
Program F12-RUN will automatically be added to the "F12RUN" jobstack
on the -I logon.
Be sure to schedule the "F12RUN" stack to run each night. To remove the
stack or change the order, run the standard ADP function JOB from the UF
menu.

*****
CONTINUE (Y/N) ?

```

Figure 17. Set Up Jobstack Option

4. At the *Continue* prompt, enter **Y**.
5. At the *Setup Complete* message, press any key to return to the CI-PART menu.
6. Press **F3=Exit** to return to the Function Code prompt.
7. On the same *name-I* application account, enter **UF** to go to the Utility Functions menu.
8. Select the Job Stack (JOB) function code.
9. At the *Option* prompt, enter **SCH** and look for the PARTRUN entry in the list.

10. At the `Stack` name prompt, enter **PARTRUN**.
11. From there, follow the usual Job Stack procedure to complete the prompts and schedule the Enhanced F12 Key parts indexing function to run on a nightly or weekly schedule, as appropriate.

Note. If, after adding the *PARTRUN* program to the job stack queue, you find that new parts you expect to see are not appearing in the F12 key search results, check the Job Stack status and settings.