

Materials Management

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Introduction

Objectives:

- This presentation will provide a base of reference material for customers considering an upgrade from Maximo 6.x or 7.1.x to version 7.5.x.
- Specifically this presentation will cover the functional and technical (if necessary) differences between these versions for the area of Maximo's materials management capabilities.

Important Notes:

- This presentation's primary purpose is to provide our customer and partner base with relevant information to assist in the planning for upgrading to version 7.5.
- This presentation assumes the participant has a baseline of knowledge regarding Maximo's functionality for the earlier releases. The format is such that the information will be presented in an incremental manner, and references to earlier functionality will only be made to explain the difference between the versions.
- All effort has been made to include all major changes in this product area. This however is not an upgrade guide and due diligence during the upgrade process is stressed for each customer.

Agenda

- **Version 7.1.x Enhancements**
 - Item Organization Details - ITEMORGINFO
 - Item Status
 - Item Images

- **Version 7.5.x Enhancements**
 - Item Stock Category
 - Inventory Costing Enhancements
 - Default Costing Method
 - LIFO/FIFO Costing
 - Consignment Inventory
 - Hard/Soft Reservations
 - Inventory Usage
 - Transfers Via Shipment

v7.1.x – Item Organization Details (ITEMORGINFO)

- Prior to version 6.x, the Item Organization Details (ITEMORGINFO) table contained attributes which were optional in nature. Users would manually create the record to house attributes such as GL, tax codes and hazard info.
- Increased inventory functionality required additional Organization level attributes (item status for example) for this reason it was not be feasible to keep the ITEMORGINFO record as an optional entity.
- The Item Master, Tools and Service items applications were modified to automatically create ITEMORGINFO records for new item/org combinations.
- This record creation can be propagated based on two possible scenarios:
 - A new item/tool/service item is created and saved to the database.
 - A new organization is created and associated with an existing item set.

Item Organization Details (ITEMORGINFO)

- Upgrade Impact: Low

- The upgrade program will automatically insert ITEMORGINFO records for all item/org combinations as necessary.

v7.1.x – Item Status

- Support for functional statuses was added to the item/inventory applications and their clones (tools, stocked tools and service items):
 - Status can be controlled at Item Master (ITEM), Organization (ITEMORGINFO) and Inventory (INVENTORY) levels.
- Supported statuses: PENDING, PLANNING, ACTIVE, PENDOBS, and OBSOLETE.
 - Status inheritance (roll-down) is optional except for OBSOLETE.
- Set and Organization status defaults for new items.
 - Allows for flexible defaulting.

Item Status Business Rules

| Status | Predecessor | Visible/ Selectable from Item Lookup? | Warning message When changing to status | Primary Usage Business Rule: | Validation when changing to status: | | Validation Error Message: |
|---------|------------------------------|--|---|--|---|---|--|
| PENDING | PENDOB PLANNING ACTIVE | NO | N/A | Item cannot be used when recording GL transactions. User should be prompted with an error when attempting to record a transaction to MATUSETRANS, MATRECTRANS, or INVTRANS except INVTRANS of type INSERTITEM. | WORKORDER/WPITEM | Item must not exist in WPITEM for work orders that are in a status other than COMPLETED or CLOSE. | Cannot change status. Item exists on one or more open work orders. |
| | | | | | JOBPLAN/JOBITEM | Item must not exist in JOBITEM for Job Plans that are in a status other than INACTIVE. | <as above> ...open job plans. |
| | | | | | MR/MRLINE | Item must not exist in MRLINE for MRs that are in a status other than CAN or CLOSE. | <as above> ...open MRs. |
| | | | | | PR/PRLINE | Item must not exist in PRLINE for PRs that are in a status other than CAN or CLOSE. | <as above> ...open PRs |
| | | | | | PO/POLINE | Item must not exist in POLINE for POs that are in a status other than CAN or CLOSE. | <as above> ...open Pos |
| | | | | | CONTRACT/ CONTRACTLINE | Item must not exist in CONTRACTLINE for Contracts that are in a status other than CAN or CLOSE. | <as above> ...open contracts |

Item Status Business Rules

| Status | Predecessor | Visible / Selectabl from Item Lookup? | Warning Message When Changing to status | Primary Business Rule: | Validation when changing to status: | | Validation Error Message: |
|----------|-------------------------------|---------------------------------------|---|--|-------------------------------------|--|--|
| PLANNING | PENDING ACTIVE | YES | N/A | Item cannot be used when recording GL transactions. User should be prompted with an error when attempting to record a transaction to MATUSETRANS, or MATRECTRANS. (issue, transfer or receipt) The application will follow the same rule as the 'disqualified vendor' functionality: Disallow approval of purchase orders. | N/A | | N/A |
| ACTIVE | PENDING PLANNING | YES | N/A | N/A | N/A | | N/A |
| PENDOBS | PENDING PLANNING ACTIVE | YES | N/A | Item can be used up from storerooms, but no balance replenishment is allowed. The application will follow the same rule as the 'disqualified vendor' functionality: Disallow approval of purchase orders. | N/A | | Could not change PO status to APPR. BMXAA2119E - Item(s) XXX is in PENDOBS status. |

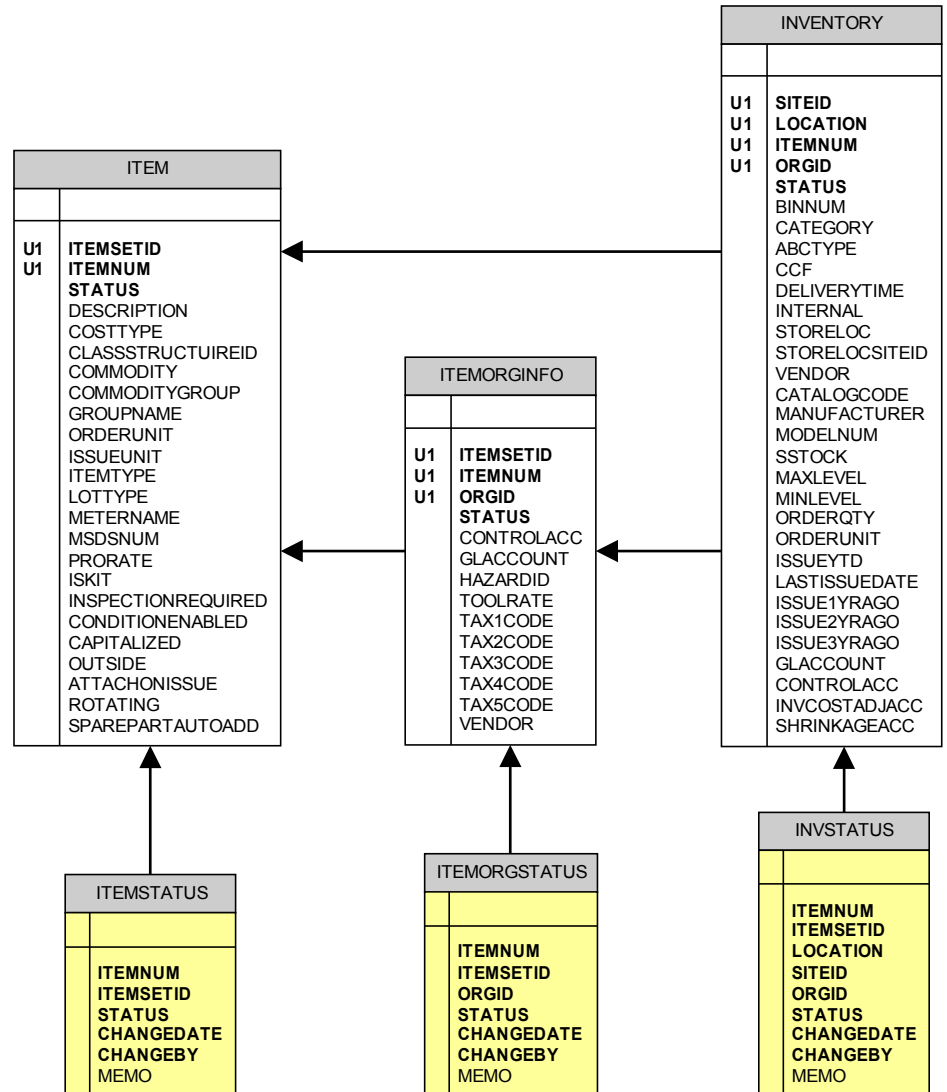
Item Status Business Rules

| Status | Predecessor | Visible / Selectable from Item Lookup? | Warning message when changing to status | Primary Business Rule | Validation when changing to status: | | Validation Error Message: |
|----------|-------------|--|---|--|-------------------------------------|---|--|
| OBSOLETE | PENDOBS | NO | This status change will make the item permanently unavailable for use. Do you wish to continue? Yes/No | OBSOLETE items cannot be used in Maximo with the exception of generating invoices. | WORKORDER/WPITEM | Item must not exist in WPITEM for work orders that are in a status other than COMPLETED or CLOSE. | Cannot change status. Item exists on one or more open work orders. |
| | | | | | JOBPLAN/JOBITEM | Item must not exist in JOBITEM for Job Plans that are in a status other than INACTIVE. | <as above> ...open job plans. |
| | | | | | MR/MRLINE | Item must not exist in MRLINE for MRs that are in a status other than CAN or CLOSE. | <as above> ...open Desktop Requisitions. |
| | | | | | PR/PRLINE | Item must not exist in PRLINE for PRs that are in a status other than CAN or CLOSE. | <as above> ...open PRs |
| | | | | | PO/POLINE | Item must not exist in POLINE for POs that are in a status other than CAN or CLOSE. | <as above> ...open POs |
| | | | | | CONTRACT/CONTRACTLINE | Item must not exist in CONTRACTLINE for Contracts that are in a status other than CAN or CLOSE. | <as above> ...open contracts |

Item Status – Additional Details

■ Status History Tables Added.

- Maintains status change history. Consistent with other Maximo statusable applications.

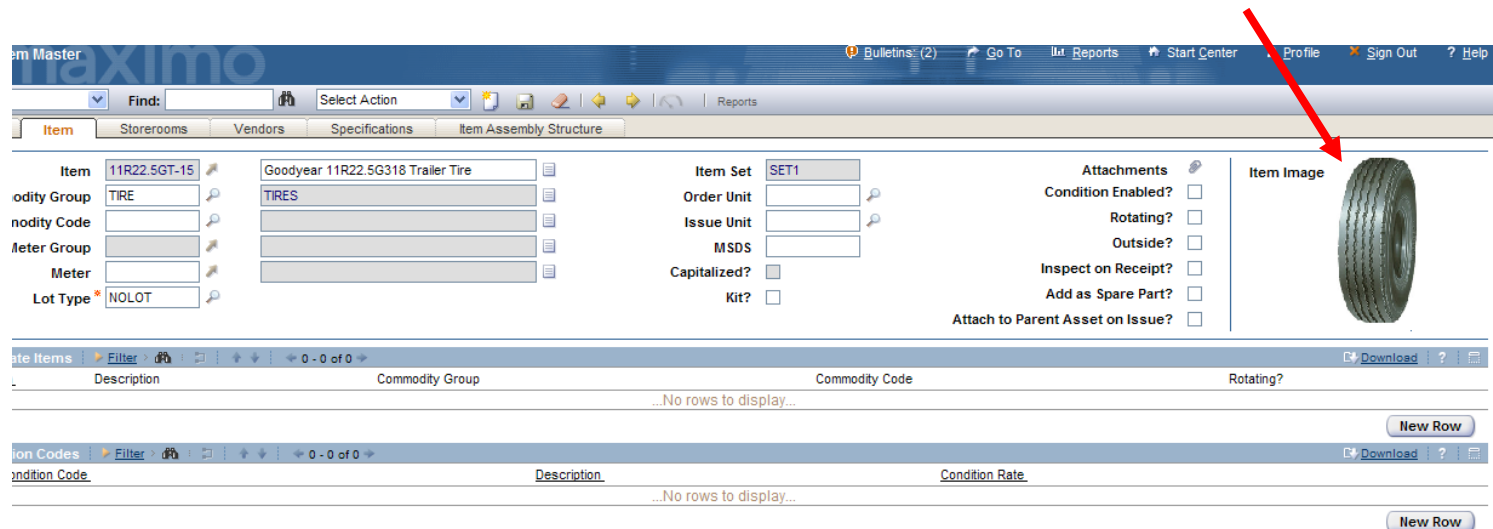


Item Status

- Upgrade Impact: Low to High
 - The upgrade program will automatically upgrade all existing Maximo ITEM/ITEMORGINFO/INVENTORY records to support item status. The post-upgrade status will be set to ACTIVE.
 - Customers who have performed customization/configuration work to create their own status functionality will need to consider whether to adopt the core functionality.

v7.1.x – Item Images

- Item images was added to support the depiction of an image within an item record.
 - This image differs from an attachment in that it is stored directly in the database.
 - Image is viewed/maintained in the Item Master application.
 - Image can be viewed from any item field via the detail menu, ‘view image’ action.



The screenshot displays the Maximo Item Master application interface. The main form shows details for item 11R22.5GT-15, identified as a Goodyear 11R22.5G318 Trailer Tire. The interface includes various input fields for commodity groups, codes, and units, as well as a list of checkboxes for maintenance actions like 'Condition Enabled?' and 'Rotating?'. A red arrow points to the 'Item Image' field, which contains a photograph of the tire. Below the main form are two empty data tables for 'Site Items' and 'Condition Codes', both showing 'No rows to display...'. Navigation buttons like 'New Row' and 'Download' are visible at the bottom of each table.

Item Images

- Upgrade Impact: None

- The support for images on item records was a completely new feature in version 7.1.x and has no impact for upgrading clients.

v6.x → v7.1.x
Questions?

v7.5.x – Item Stock Category

- Change to the Definition of Stock Category
 - Previously, stock category controlled automatic replenishment
 - A stocked item was automatically included in the reorder algorithm
 - A non-stocked or special order item was omitted from the reorder process
 - Stock category will now control whether an item is ‘stockable’ and can exist in a storeroom or whether it is only available for direct order from a vendor (non-stocked).
- Stock Category Moved to Item/Organization level
 - Controls stockability for items within an organization
- ‘Reorder?’ yes/no flag added to Inventory record
 - Allows for seamless transition from previous functionality
- Benefits
 - Resolves functional gap on usage of stocked/non-stock item terminology. Better alignment with ERP systems.

Item Stock Category

- Upgrade Impact: Low to Moderate
 - The upgrade process will automatically modify pre-existing records based on the following:
 1. Set the ORGANIZATIONS.CATEGORY value to 'STK'
 2. Set all items to 'STK' at ITEMORGINFO levels.
 3. Set the INVENTORY.REORDER flag for all 'upgraded' inventory items:
 - If the pre-install INVENTORY record was set to STK set the INVENTORY.REORDER = TRUE
 - If the pre-install INVENTORY record was set to NS or SP set the INVENTORY.REORDER = FALSE(A copy of the pre-upgrade stock category value will be maintained in the upgraded INVENTORY table)
 - If a customer has made changes to the base processing for stock category. These changes would need to be evaluated during the upgrade.

v7.5.x – Default Costing Method

▪ Default Costing Method

- Previously, costing method was defined at the site-level
 - All storerooms, and inventory records below a site use the same inventory cost
- Costing method will now be set at the Inventory level
 - The costing method will continue to be defaulted from the site level
 - Costing method can be set differently between inventory records within the same storeroom and site

▪ Upgrade Impact: Low

- The upgrade process will automatically add the cost type fields to the INVENTORY table and will set the value based on the site-level default. In essence all items will still be set to a site-level cost type until such time as a user changes the cost type.

v7.5.x - LIFO/FIFO Costing Method

- 'New' costing method to allow for valuation at actual receipt costs on a LIFO or FIFO basis
 - Costs will be associated to quantities and receipt dates.
 - Cost records are stored in the INVLIFOFIFOCOST table.
 - The LIFO/FIFO quantity must always match the sum of the inventory current balances.
 - LIFO/FIFO cost will be dictated by the transaction that increases the balance.
 - The following transactions can create records in the INVLIFOFIFOCOST table:
Receipt, return, transfer in, reconcile balance adjustment and current balance adjustment.
- Upon consumption: (issue, transfer, balance adjustment)
 - As LIFO/FIFO items are consumed from inventory, the cost utilized for transaction creation will either be the 'oldest' (for FIFO) or the 'newest' (for LIFO) cost date.
 - Cost records are 'consumed' and deleted from the table when the quantity for the cost record equals zero.
 - In the case where a transaction requires more than one cost record to satisfy the quantity of a transaction, multiple transactions will be written, one for each cost used. In this case the unit cost on the screen will be the average of the cost records.

LIFO/FIFO Costing – FIFO Example

| Item XYZ – Storeroom Central | | | | |
|------------------------------|----|---------------------|---------|-----|
| <u>Balance</u> | | <u>Receipt Cost</u> | | |
| Bin A-1 | 20 | Date | Price | QTY |
| Bin B-2 | 10 | July 1 | \$14.99 | 12 |
| | | July 5 | \$17.99 | 8 |
| | | July 6 | \$16.50 | 10 |

Issue Transaction
 Qty 5 Bin A-1
 Cost \$14.99

| Item XYZ – Storeroom Central | | | | |
|------------------------------|----|---------------------|---------|-----|
| <u>Balance</u> | | <u>Receipt Cost</u> | | |
| Bin A-1 | 15 | Date | Price | QTY |
| Bin B-2 | 10 | July 1 | \$14.99 | 7 |
| | | July 5 | \$17.99 | 8 |
| | | July 6 | \$16.50 | 10 |

Transfer Transaction
 Qty 14 From Bin A-1
 Cost 7 at \$14.99
 7 at \$17.99

| Item XYZ – Storeroom Central | | | | |
|------------------------------|----|---------------------|---------|-----|
| <u>Balance</u> | | <u>Receipt Cost</u> | | |
| Bin A-1 | 1 | Date | Price | QTY |
| Bin B-2 | 10 | July 5 | \$17.99 | 1 |
| | | July 6 | \$16.50 | 10 |

LIFO/FIFO Costing – FIFO Example

| Item XYZ – Storeroom Central | | | | |
|------------------------------|----|---------------------|---------|-----|
| <u>Balance</u> | | <u>Receipt Cost</u> | | |
| Bin A-1 | 1 | Date | Price | QTY |
| Bin B-2 | 10 | July 5 | \$17.99 | 1 |
| | | July 6 | \$16.50 | 10 |



| <u>Receipt Transaction</u> | |
|----------------------------|-------------------|
| Qty 9 | To Bin A-1 |
| Date | July 8 |
| Cost | \$15.21 |



| Item XYZ – Storeroom Central | | | | |
|------------------------------|----|---------------------|---------|-----|
| <u>Balance</u> | | <u>Receipt Cost</u> | | |
| Bin A-1 | 10 | Date | Price | QTY |
| Bin B-2 | 10 | July 5 | \$17.99 | 1 |
| | | July 6 | \$16.50 | 10 |
| | | July 8 | \$15.21 | 9 |


LIFO/FIFO Costing

- Upgrade Impact: Low to Moderate
 - The LIFO/FIFO cost method is new for version 7.5. Post-upgrade, customers can elect to change existing inventory records to use LIFO or FIFO costing via the ‘change cost type’ action.
 - If a customer has customized/configured functionality in the area of costing, it may require analysis to determine if it will impact or be superseded by the LIFO/FIFO functionality.

v7.5.x - Consignment Inventory

- Consignment Inventory
 - Adds support for 'vendor-owned' inventory valuation
 - Allows for items to be paid for on use rather than pay on receipt
- Consignment Prior to MAM 7.5:



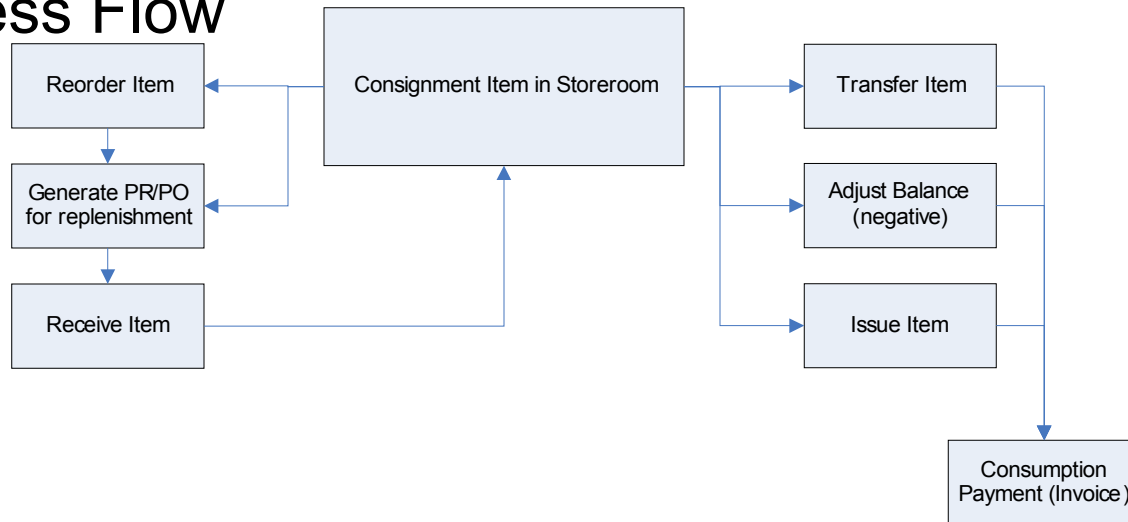
- Attachments** 
- Condition Enabled?**
- Rotating?**
- Outside?**
- Inspect on Receipt?**

- Simple YORN flag
- No additional functionality such as:
 - Usage tracking
 - Payment processing
 - Replenishment notices



Consignment Inventory

■ Process Flow



■ Highlights of Consignment Inventory Functionality

- Consignment inventory items function similar to regular items:
 - They have balances. They can be reordered, issued, transferred, etc.
- Consignment items on a PO constitute a 'replenishment request', not a committed order for which the customer will pay. Again, pay on use, not pay on receipt.

Consignment Inventory

- The consignment flag and associated details are at the inventory level.
 - The add items to storeroom dialog box allows users to set an item as consignment as well as specify the consignment details for the item.
 - Additionally the user can set/modify the consignment detail via the 'View/Edit Consignment Details' action in the inventory application
 - The Consignment Vendor is the vendor that 'owns' the consignment inventory.
 - The Invoice Generation Type is used to set how Consignment Invoices should be generated:
 - CONSUMPTION – Use this to generate a consignment invoice on each consumption transaction (issue, transfer, adjustment)
 - FREQUENCY – Use this to generate a consignment invoice on a frequency. Must specify the frequency units and next invoice date. (example, every 90 days)
 - MANUAL – Use this to indicate that consignment invoices will be generated manually. The user will use the invoices application to consolidate consignment usage onto an invoice to pay the vendor

View/Edit Consignment Details

Consignment?

* Consignment Vendor: >>

Manufacturer: >>

Model:

Catalog #:

* Invoice Generation Type: 🔍

Frequency:

Frequency Units: 🔍

Next Invoice Date: 📅

OK Cancel

Consignment Inventory

■ PO

- ‘Consignment’ added as a new PO type. A consignment type PO has the same business rules as a standard PO with the exception that only consignment items can exist on the PO lines.
- Consignment flag added to the POLINE. Indicates if the item is consignment. Used by the invoices application to disallow creation of an invoice line from the PO line.

■ Invoices

- ‘Consignment’ added as a new Invoice type. A consignment invoice is used to pay for consignment items consumed from inventory.
- Consignment invoices will not show the ‘copy PO lines’ button. Instead there is a ‘Select Consignment Transactions’ button to add the appropriate consignment lines to be paid. These transactions correspond to MATUSETTRANS, MATRECTTRANS and INVTRANS records for consignment items.

Consignment Inventory

- Upgrade Impact: Low to High
 - Consignment Inventory functionality is essentially new for version 7.5.
 - The 'outside' flag is not employed by the upgrade process to set consignment items. This is due to the fact that there is no functionality behind this flag and many customers have adopted this flag for various uses.
 - Post-upgrade, customers can elect to change existing inventory records to utilize the consignment.
 - If a customer has customized/configured functionality to serve as their needs for consignment, it may require analysis to determine if it will impact or be superseded by the new functionality.

v7.5.x - Hard/Soft Reservations

- **Reservations Can be Set as Hard or Soft**
 - Allows users to specify reservation priority
 - Hard reservations affect available balance and require the balance to be on-hand at the time of reservation creation
 - Soft reservations would be considered to be uncommitted or contingency demand

- **'Automatic' Reservation Processing**
 - Reservations can be created under automatic processing.
 - The system will automatically set the reservation to APSOFT or APHARD depending on the required date of the item compared to the lead time to procure the item
 - 'Backorder' functionality to indicate when a hard reservation is desired, but available balance on-hand is insufficient to satisfy a hard reservation.

Hard/Soft Reservations

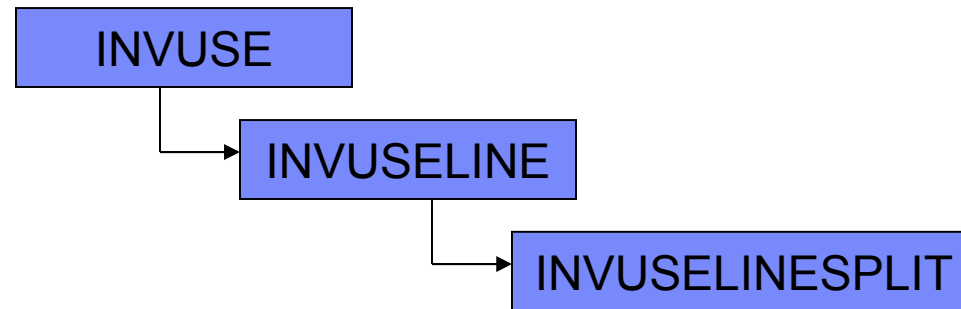
- Upgrade Impact: Low to High
 - The hard/soft reservation enhancement adds an additional layer of functionality to the existing reservations platform.
 - All reservations will be upgraded based on the following:
 - If required date is NULL, the system will set the reservation to SOFT.
 - If required date is specified:
 - o If negative available balance is disallowed – Existing reservations will be sorted by required date and all reservations that can be satisfied by the existing balance will be set to APHARD. Those that cannot be satisfied by the existing balance will be set to BACKORDER.
 - o If negative balance is allowed, set reservations to APHARD.
 - Upgrade impact will be determined based on the level of custom process/configuration/code has been employed in this area.

New Application – Inventory Usage

- Inventory usage replaces the Issues and Transfers application
 - Similar look and feel
 - Simplified flow - Issues and transfers are recorded from the same tab
 - The Issues and Transfers is available to unhide for reference purposes.
- Inventory Usage records consist of a statusable header and related lines records.
 - Allows for business process to be employed *prior* to transaction creation.
 - Workflow can be enabled on Inventory Usage documents
- Robust ‘out-of-the-box’ business functionality
 - Optional automatic creation of inventory usage documents.
 - Split quantities across multiple supplying bins.
 - Staging functionality to set aside balances for issue or transfer and hold these balances in a staging bin until ‘picked up’.
 - Shipping - Transfers that require the use of an intermediary location (courier, shipper, truck, etc) can create shipment records to track items in transit.

Inventory Usage Application – Key Design Elements

- New application, built from the ground up.
- Application consists of a header and lines concept (similar to PR/PO).
 - Users will be inserting a document that will be processed via status change. Status change will drive transaction creation.
 - New Objects:



- Single-tab for recording of header and line data.
 - Issue and transfer transactions created and managed from the same tab.
- Relevant business rules migrated forward.


Inventory Usage Application – Key Design Elements

- Usage type – Header and Line attribute
 - Header usage type will be used to drive what lines can be associated with this document.
 - ISSUE – Only Issue/Return lines can be recorded.
 - TRANSFER – Only Transfer lines can be recorded.
 - MIXED – Allows ISSUE/RETURN/TRANSFER lines to be recorded against the same document.
 - Line usage type will default based on the header value.
 - If user changes line to an allowed value, this action will modify the line details to support the appropriate transaction entry....eg: changing from issue to transfer would remove charge details for WO/ASSET etc and add Transfer To details. (conditional UI)
- Splitting Quantities – Allows for the creation of a single usage line that will create multiple transactions upon completing the document.
 - Two Use Cases:
 - Multiple Bin Selection – Used in the event that the specified bin has insufficient quantity to meet the request. User can select multiple bins to meet the request.
 - Rotating Item Selection – Used in the event that a rotating item for a quantity in excess of 1 is requested. User can select additional rotating assets to be used for the transaction.
 - Auto-Split - This function can be used to automatically select multiple bins or rotating assets if necessary.

Inventory Usage Application

- **Splitting Quantities** - Upon status change the system will evaluate the material requirement and determine if the requested qty can be satisfied by the specified bin. If not, the 'split usage quantity' dialog box is displayed.

Split Usage Quantity

 The quantity requested exceeds the bin's current balance. Select multiple bins to source items from, or specify rotating assets for the current usage line. You can click Auto-Split to automatically select the additional bins or rotating assets.

Usage Lines Filter 1 - 1 of 1 Download

| Line | Rotating | Item | Description | Usage Type | Quantity | From Bin | From Lot | Current Balance | Total Current Balance | Total Avail. Balance |
|------|--------------------------|--------|--------------------------------------|------------|----------|----------|----------|-----------------|-----------------------|----------------------|
| 1 | <input type="checkbox"/> | KB0901 | KB Fasteners - 3" Chromoly Bolt 0901 | ISSUE | 10.00 | A1 | | 3.00 | 18.00 | 18.00 |

Split Across Multiple Bins for KB0901 Filter 1 - 3 of 3 Download

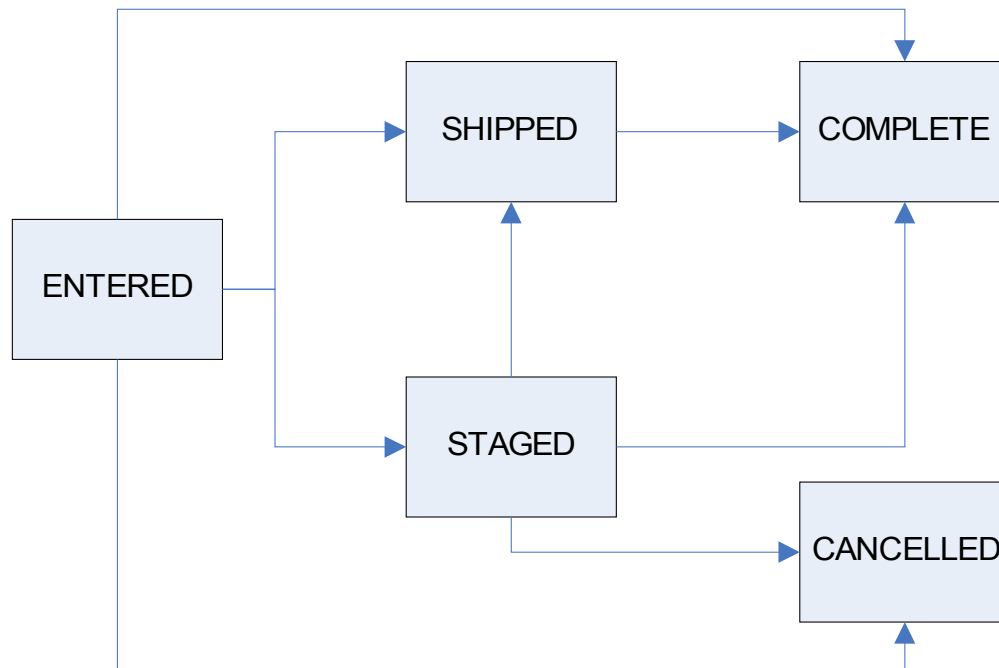
| Line | From Bin | Quantity | Physical Count | Physical Count Date |
|------|----------|----------|----------------|---------------------|
| 1 | C1 | 2.00 | | 9/1/10 12:12 PM |
| 1 | B1 | 5.00 | | 9/1/10 12:12 PM |
| 1 | A1 | 3.00 | | 9/1/10 12:12 PM |

New Row

Auto-Split OK Cancel

Inventory Usage Application

- Status Change - ENTERED, STAGED, SHIPPED, COMPLETE, CANCELLED

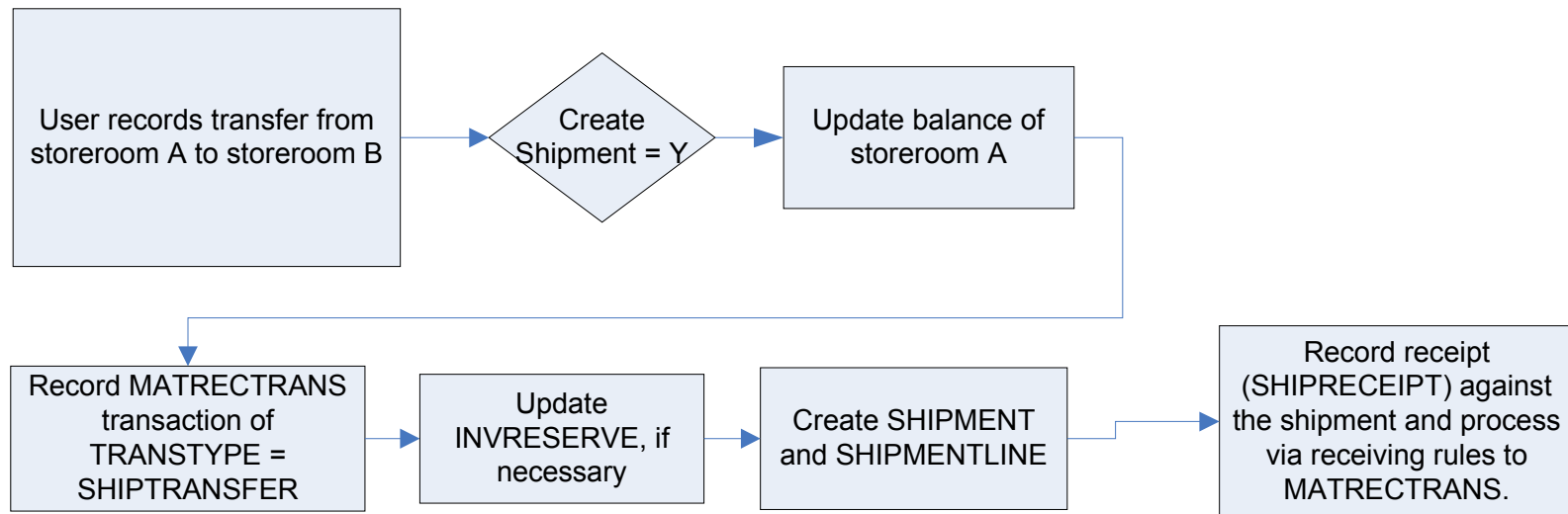


Inventory Usage Application

- **ENTERED** – This is the ‘starting’ status for usage documents. There are no limitations or special processing rules for ENTERED status. Upon saving a document in ENTERED status, the system will update the INVRESERVE.PENDINGQTY with the line qty if the usage line is associated with a reservation.
- **STAGED** – This status will be used to indicate the item has been picked and ‘staged’ for issuance. When the user sets the document to ‘STAGED’ status they will need to choose how they will set the stage bin information for the quantities to be staged. They will have the option to do one of the following:
 1. Use the default stage bin for each inventory item.
 2. Enter a new ‘stage bin’ number for use by all rows that will be staged.
 3. Use the current bin. – Meaning that the binnum that the issue or transfer will be completed from will be used.
 - Upon completing this status change the system will adjust the INVBALANCES.CURBAL for the supplying bin. Additionally, the system will adjust the INVBALANCES.STAGECURBAL for the amount of the transaction. This may require the system to insert new INVBALANCES records in the case that the specified stage bin does not already exist.
 - The system will write a MATRECTRANS of type ‘STAGETRANSFER’ to record the balance movements. (See Transaction Creation section)
 - The system will update the INVRESERVE.STAGEDQTY with the transaction qty if the transaction is associated with a reservation.
 - The document cannot be changed to STAGED status under the following scenarios:
 - If the document contains one or more lines of type RETURN.
 - If the current status is SHIPPED, CANCELLED or COMPLETE.
- **SHIPPED** – This status will be used by the ‘transfer via shipment’ functionality. A line for a document in SHIPPED status has been deducted from the supplying storeroom’s balance, but has not been received by its final destination. The shipment receiving application will be used to record these ‘receipts’ and will generate the necessary transactions .
- **COMPLETE** – A status change to COMPLETE will generate the appropriate usage transactions (ISSUE/TRANSFER – See Transaction Creation section). A status change to COMPLETE will also occur for any line that was in SHIPPED status but has been received by the final destination.
- **CANCELLED** – The usage document can be cancelled at any point prior to it being SHIPPED or COMPLETED. If CANCELLED, the document will no longer be editable. Cancelling a usage document that has staged balances will reverse the corresponding STAGETRANSFER transactions.

Transferring Via Shipment

- Inventory usage records that are 'shipped' will conform to the following business flow:



Transferring Via Shipment

- Transfer options – The organizations application will hold this new action to govern when a shipment record is required for transfers:
- NOTE: Internal Purchase Orders used to be required for all cross-organization transfers prior to MAM 7.5. With the advent of the Inventory Usage application it is less likely that customers will be employing internal purchase orders as the Inventory Usage can satisfy the same business requirements (approvals, security, etc).

Transfer Options

Require Shipment:

Across Organizations
 Across Sites
 All Transfers

Require Purchase Order:

Purchase Order Not Required
 Across Organizations
 Across Sites

OK Cancel

- At minimum, shipments will be required for all cross-organization transfers, and customers can choose to require them for all cross-site transfers or even for every transfer within the system.
- Require Purchase Order controls when an internal purchase order is necessary in order to transfer items.

Transferring via Shipment

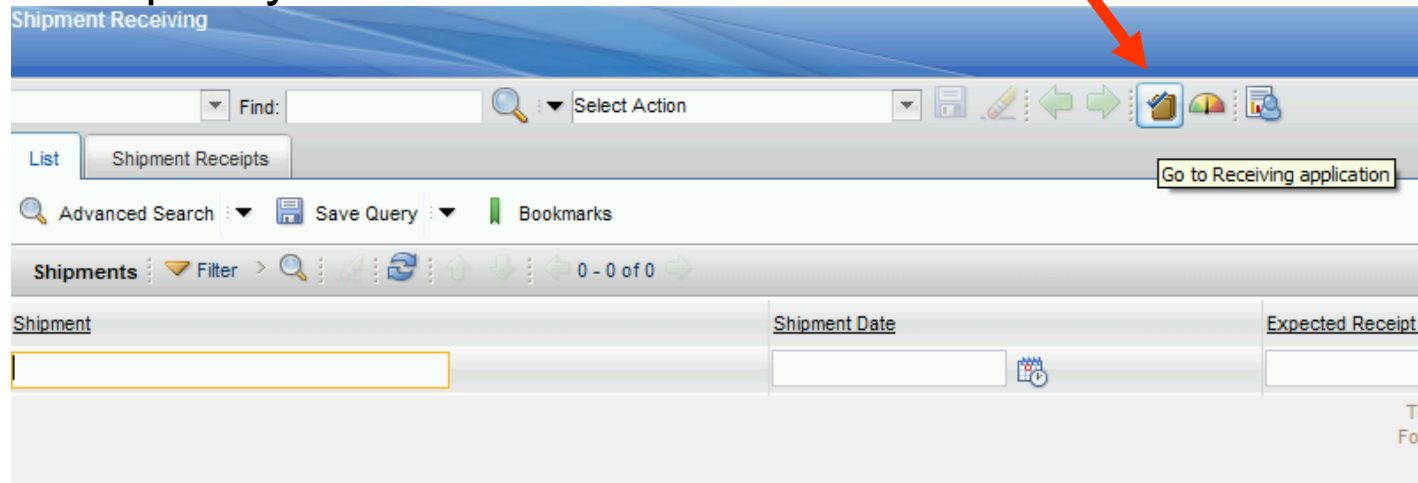
■ Create Shipment Dialog

- When the user changes the Inventory Usage document to SHIPPED status, they will be presented with the 'Create Shipment' dialog. This allows them to specify the shipment details and review the lines that will be shipped.

| Line | Item | Description | Quantity | To Location |
|------|--------|---------------------------------------|----------|-------------|
| 1 | 230-00 | Elbow, Street- 90 Deg, 1 in | 1.00 | PKG |
| 2 | 560-00 | Tubing, Copper-1 In ID X .030 In Wall | 1.00 | GARAGE |
| 3 | 230-00 | Elbow, Street- 90 Deg, 1 in | 1.00 | MACHSHOP |

Transferring via Shipment

- At such time as the shipment has been received at the destination storeroom, the user will employ the Shipment Receiving application.
- Shipment Receiving was developed using the Receiving application as its base. The difference being that it records receipts against shipment documents rather than PO's.
- Due to the fact that customers will likely switch between the two applications often, a button has been added to the toolbar of each to allow the user to quickly move between the two.



Find: Select Action

List **Inventory Usage**

Usage *1001 From Storeroom *CENTRAL Central Storeroom Inventory Owner WILSON

Usage Type *MIXED Site BEDFORD Attachments Status ENTERED

Usage Lines Filter 1 - 6 of 6 Download

| Line | Item | Description | From Bin | Usage Type | Quantity | Split |
|------|----------|------------------------------|----------|------------|----------|-------|
| 1 | Z-RAGS | Rags, Cloth | A-9-3 | ISSUE | 3.00 | |
| 2 | XMP-4200 | Fan, Cooling- B340, 3 In Dia | B-7-2 | TRANSFER | 20.00 | |
| 3 | 11406 | AC Spark Plug | A-5-6 | TRANSFER | 6.00 | |
| 4 | FLT001 | Filter | B-7-2 | ISSUE | 4.00 | |
| 5 | PUMP100 | Centrifugal Pump 100 GPM, 60 | | ISSUE | 1.00 | |
| 6 | 584-L0 | Lockwasher- 1/2 In | | ISSUE | 50.00 | |

Change Status

Usage 1001 Status ENTERED Entered

New Status *

Memo

Line Item

Usage Type *Issue Line Type *Item Item *Z-RAGS Rags, Cloth Stock Category STK Outside?

Quantity and Costs

From Bin A-9-3 Quantity * 3.00 Issue Unit BOX Unit Cost 0.02 Line Cost 0.06

Charge Information

To Site BEDFORD Request Requisition Requisition Line Returned Against Issue? Issue To

Transaction Details

New Physical Count New Physical Count Date 4/28/10 10:14 AM Entered By *WILSON Actual Date *4/28/10 10:14 AM Remark

-

Find: Select Action:

List **Inventory Usage**

Usage *1002 From Storeroom *CENTRAL Inventory Owner Central Storeroom

Usage Type *MIXED Site BEDFORD Attachments Status ENTERED

Usage Lines Filter > 1 - 2 of 2

| Line | Item | Description | From Bin | Usage Type | Quantity | Split |
|------|--------|---------------------------------------|----------|------------|----------|--------------------------|
| 1 | 560-00 | Tubing, Copper-1 In ID X .030 In Wall | A-9-2 | TRANSFER | 3.00 | <input type="checkbox"/> |
| 2 | 230-00 | Elbow, Street- 90 Deg, 1 In | A-6-2 | TRANSFER | 4.00 | <input type="checkbox"/> |

Create Shipment

Shipment

Shipment: 1001 Carrier: KevEx Shipping Ship To: 1B9
 Shipment Date: *4/28/10 10:25 AM Packing Slip: N8971V Site: BEDFORD
 Expected Receipt Date: 5/5/10 12:00 AM

Shipment Lines Filter > 1 - 2 of 2

| Line | Item | Description | From Bin | From Lot | Rotating Asset | Quantity Shipped | To Location | Remarks |
|------|--------|---------------------------------------|----------|----------|----------------|------------------|-------------|---------|
| 1 | 560-00 | Tubing, Copper-1 In ID X .030 In Wall | A-9-2 | | | 3.00 | PKG | |
| 2 | 230-00 | Elbow, Street- 90 Deg, 1 In | A-6-2 | | | 1.00 | PKG | |

OK Cancel

4.00
1.00
2.50
10.00

Request: Issue To: Actual Date: *4/28/10 10:23 AM Remark:

-

Inventory Usage Application

▪ Upgrade Impact: Moderate to High

- The Inventory Usage application is all new for version 7.5. The application was designed with the existing user base in mind. The layout, flow, and overall usability are similar to its predecessor. The adoption of the new application should be straight-forward for most users to get 'up and running'.
- Adoption of additional functionality, such as staging and splitting may require some additional training/ramp-up time.
- Any customizations/configurations made to the existing transaction tables will need to be reviewed for compatibility post-upgrade.
- All existing transfer transactions via an intermediary should be completed prior to upgrade.

Questions?

Reference Links

- For the complete list of playbacks for this series:
 - <http://www-01.ibm.com/support/docview.wss?rs=0&uid=swg27028563>

- Maximo Info Center (Online Help)
 - <http://pic.dhe.ibm.com/infocenter/tivihelp/v49r1/index.jsp?topic=%2Fcom.ibm.mam.doc%2Fwelcome.html>

- Maximo Asset Management Blog
 - <https://www.ibm.com/developerworks/servicemanagement/am/index.html>

- Pulse 2013
 - <http://www-01.ibm.com/software/tivoli/pulse/>

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