

IBM Maximo Asset Management version 7.5

Manual reorder process



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In this training module you will learn about the Maximo® Asset Management version 7.5, Manual reorder process.

Objectives

When you complete this training module, you are able to perform these tasks:

- Define the terms related to the reorder process
- Configure the applications required by the reorder process
- Configure the applications required to make calculations
- Troubleshoot and resolve common reorder process problems

When you complete this training module, you are able to perform these tasks:

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Reorder process overview

The manual reorder process:

- Created both internal and external Purchase Requests (PR)
- Creates both internal and external Purchase Orders (PO)
- PRs and POs contain lines for the items that are due to be ordered
- Replenishes the storeroom stock levels

The manual reorder process replenishes stock levels. It creates both external and internal Purchase Requests (PR). It also creates external and internal Purchase Orders (PO). PRs and POs contain PR/PO lines for items that are due to be ordered.

Organization application to generate internal and external PRs and POs

ORGANIZATION Application > Inventory options > Reorder

Inventory Reorder

External Request Creation

Unapproved PRs

Approved PRs

Unapproved POs

Approved POs

Internal Request Creation

Unapproved PRs

Approved PRs

Unapproved POs

Approved POs

Maximum Number of Reorder Lines per PO/PR

Reorder consolidate all vendor and contract items onto PR or PO records

External Request – The order is placed against an outside vendor

Internal Request – The order is placed against an internal storeroom

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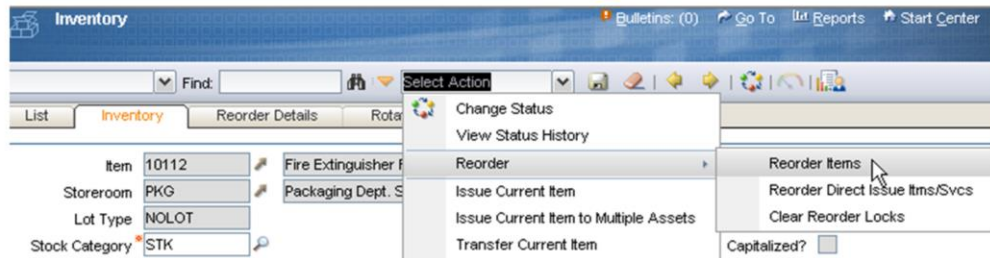
Reorder generates Purchase Request or Purchase Order records either in Waiting for Approval status or Approved status.

For Internal request – Select the INTERNAL check box, specify a storeroom and storeroom site.

For External request – The user looks at the primary vendor in the **Reorder** tab in the Inventory app. The user then manually runs Reorder in the Inventory application or by way of a scheduled cron task.

Inventory application

INVENTORY – Reorder Items or Reorder Direct Issue Itms / Svcs



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Navigate to the **Select Action** menu then navigate as shown to select **Reorder Items**.

Reorder items (reorder range)

Go to select action menu > reorder option

Specify reorder parameters: for example

Additional Lead Time (Days) – value to be added to the vendors lead time

Ignore Reorder Point? - always order a quantity of one of the EOQ (Economic Order Quantity) levels for each item being ordered.

The screenshot shows the 'Reorder Items' window with the following sections:

- Reorder Range:** Includes fields for 'Storeroom' (PKG), 'Site' (BEDFORD), and 'Additional Lead Time (Days)' (0). A dropdown menu shows 'Packaging Dept. Storeroom'.
- Reorder Options:** Includes checkboxes for 'Ignore Reorder Point?' (unchecked), 'Reorder Direct Issue Items and Services?' (unchecked), 'Consider Contracts When Creating PRs/POs?' (checked), and 'All Items in Storeroom?' (unchecked).
- Reorder Runtime Option:** Includes a checked checkbox for 'Run in Background Mode?' and an 'E-mail Address Notification' field.

Buttons at the bottom: Preview, Run Reorder, Cancel.

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From the Reorder Items window you will see three sections: Reorder Range, Reorder Options, and Reorder Runtime Option. In the Reorder Range section there is a box for entering the storeroom, site and additional lead time. **Additional Lead Time (Days)** is defined as the value in days to be added to the vendor lead time.

Reorder items (reorder options)

Go to select action menu > reorder option

Specify reorder parameters: for example

Additional Lead Time (Days) – value to be added to the vendors lead time

Ignore Reorder Point? - always order a quantity of one of the EOQ (Economic Order Quantity) levels for each item being ordered.

Reorder Items

Reorder Range

Storeroom: PKG Packaging Dept. Storeroom

Site: BEDFORD

Additional Lead Time (Days): 0

Reorder Options

Ignore Reorder Point? Reorder Direct Issue Items and Services?

Consider Contracts When Creating PRs/POs? All Items in Storeroom?

Reorder Runtime Option

Run in Background Mode? E-mail Address Notification: []

Preview Run Reorder Cancel

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The Reorder Options section filters the reorder items criteria. Reorder Options can allow the reorder of all items in the storeroom, the reorder of only direct issue items and services, the consideration of contracts when creating purchases, and the ignoring of the designated reorder point. Always allow an order of one Economic Order Quantity level for each item being reordered.

Reorder items (reorder runtime option)

Go to select action menu > reorder option

Specify reorder parameters: for example

Additional Lead Time (Days) – value to be added to the vendors lead time

Ignore Reorder Point? - always order a quantity of one of the EOQ (Economic Order Quantity) levels for each item being ordered.

The screenshot shows a dialog box titled "Reorder Items" with three main sections:

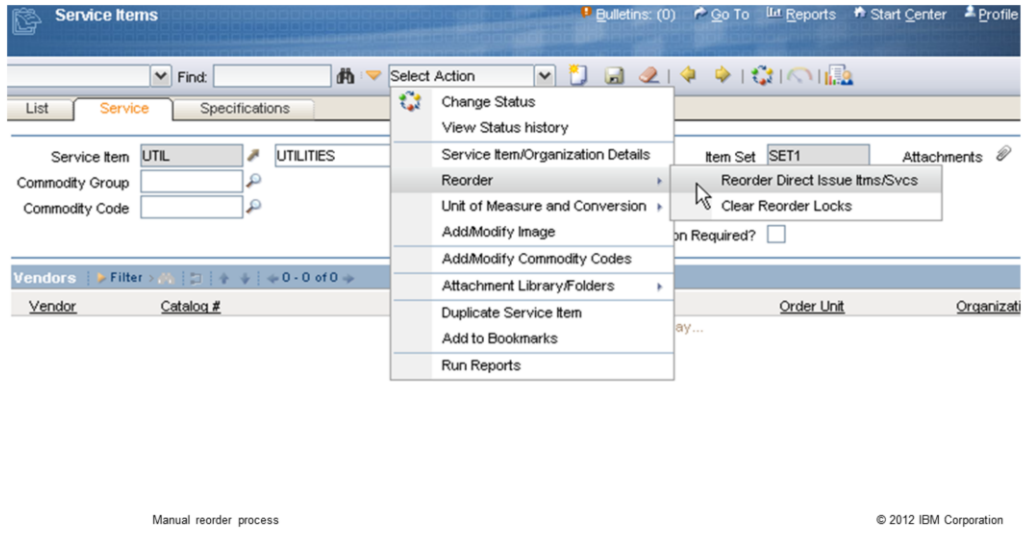
- Reorder Range:** Includes dropdowns for "Storeroom" (set to "PKG") and "Site" (set to "BEDFORD"), and a text input for "Additional Lead Time (Days)" set to "0".
- Reorder Options:** Contains four checkboxes: "Ignore Reorder Point?" (unchecked), "Reorder Direct Issue Items and Services?" (unchecked), "Consider Contracts When Creating PRs/POs?" (checked), and "All Items in Storeroom?" (unchecked).
- Reorder Runtime Option:** Contains a checked checkbox for "Run in Background Mode?" and a text input for "E-mail Address Notification".

At the bottom of the dialog are three buttons: "Preview", "Run Reorder", and "Cancel".

The Reorder Runtime Option section allows system users to generate the reorder in the background and send an email notification when completed. There is also an option which allows system users to preview the reorder before actually running the reorder.

Service items application (1 of 2)

Navigate to Select Action > Reorder > Reorder Direct Issue Items / Svcs



It is also possible to use the Service Items application to reorder direct issue items and service items.

Service items application (2 of 2)

Reorder Direct Issue Items and Services window

Site

PR/PO Details

Consider Contracts When Creating PRs/POs?

Additional Lead Time (Days)

Reorder Runtime Option

Run in Background Mode?

E-mail Address Notification

Reorder items that are listed on approved work orders and are issued without being received into Inventory

Select **Consider Contracts When Creating PR/POs?** to look at existing contracts associated with this item or items to obtain pricing and contract details when creating PRs and POs.

In the Services Items application, the Reorder Direct Issue Items and Services window contains three sections: Site, PR/PO Details, and Reorder Runtime Option. The **Site** field can be incomplete. An incomplete entry allows the system user to search for the required site. The PR/PO Details section contains instruction contracts and allows for additional lead time. Selecting **Considering Contracts When Creating PRs/POs** allows system users to look at existing contract item pricing when creating reorder purchase request and purchase orders. The Reorder Runtime Option section allows system users to generate the reorder in the background and send an email notification when completed. There is an option which allows system users to preview the reorder before actually running the reorder.

Reorder process trouble symptoms

Symptoms:

- No items reordered
- No PRs generated
- Reordered quantity is incorrect
- Reorder quantity is incorrect and not in multiples of EOQ

These symptoms indicate reorder process problems:

- Items are not reordered
- Reordered item quantities are incorrect and not in multiples of EOQ
- Purchase requests are not generated

Reorder process troubleshooting

Ensure that these conditions exist:

- 1) In the inventory application, Order and Issue Units do not have a null value.
- 2) If internal flag is false (not checked), Storeroom and Storeroom site have null values and are read only
- 3) A conversion factor must exist between issue unit and vendor's order unit
- 4) Check the log file for any error messages

These conditions can cause reorder process problems:

- Order and Issue Units are null values in the inventory application
- The Storeroom and Storeroom Site do not have null values when the internal flag is false
- The Storeroom and Storeroom Site are not read only when the internal flag is false
- Purchase requests are not generated
- Log file **systemerr.log** reveals reorder process error messages
- Required conversion factors do not exist between the issue unit and vendor's order unit of measure

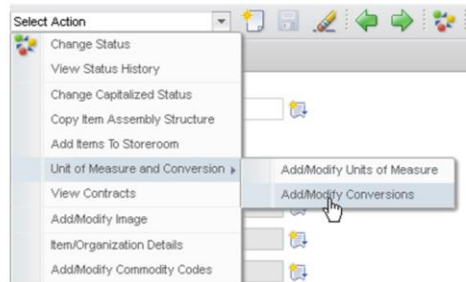
Conversion does not exist error message

Systemerr.log from
\\IBM\Websphere\AppServer\profiles\custom01\logs\MXServer\

Example one

error message in the log:

**“A conversion does not exist between
unit of measure PK and EA.”**



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Check the System error log file from the
\\IBM\Websphere\AppServer\profiles\custom01\logs\MXServer\ directory.

For example, an error message in the log that reads “A conversion does not exist between
unit of measure PK and EA.”

This message indicates that the conversion factor between Pack and Each (unit of
measure) has not been setup.

To resolve this problem, setup the conversion between various units of measure in the
Item Master application by way of **Select Action > Unit of Measure and Conversion >
Add/Modify Conversions.**

Order unit field is blank error message

Example two

Error: Required field Order Unit is blank.

- Ensure that the Order Unit has been populated in the Item Masters application and inventory application

The screenshot displays the 'Item Master' application interface. At the top, there is a search bar with a 'Find:' label and a 'Select' button. Below the search bar are navigation tabs: 'List', 'Item', 'Storerooms', 'Vendors', and 'Specifications'. The 'Item' tab is selected. The main form contains several fields:

- Item: RTO18 >> RTO18 FULLER 18
- Item Set: SET1
- Commodity Group: DRVTRAIN
- Commodity Code: [blank]
- Meter Group: [blank]
- Meter: [blank]
- Lot Type: NOLOT
- Maximum Quantity Issued: [blank]
- Order Unit: [blank]
- Issue Unit: [blank]

Ensure that the **Order Unit** field has been populated in the Item Master application.

Order unit field is blank

Error: Required field Order Unit is blank.

- Ensure that the Order Unit has been populated in the inventory application

The screenshot shows the 'Inventory' application interface. At the top, there is a search bar with 'Find:' and a 'Select Action' dropdown. Below this are navigation tabs: 'List', 'Inventory', 'Reorder Details' (selected), 'Rotating Assets', and 'Where Used'. The main content area displays item and storeroom information:

Item: RTO18 >> RTO18 FULLER 18 SPEED TRANSMISSION
Storeroom: ATLANTA >> Atlanta Storeroom

The 'Reorder Details' section contains the following fields:

- Reorder?
- Reorder Point: 0.00
- Lead Time (Days): 0
- Safety Stock: 0.00
- Economic Order Quantity: 1.00
- Order Unit:

Ensure that the **Order Unit** field has been populated in the Inventory application.

Summary

Now that you have completed this training module, you can perform these tasks:

- Define the terms related to the reorder process
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