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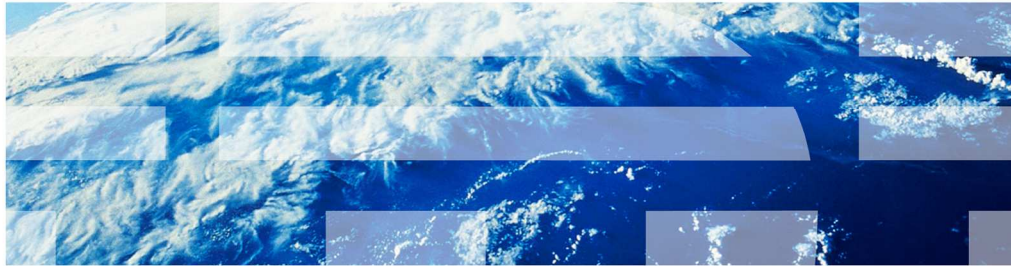
IBM Maximo Asset Management version 7.5

How to use HARD and SOFT reservations in work order tracking

In this training module for Maximo® Asset Management 7.5, you learn about the six material item reservation types used in work order tracking. You also learn how to use the Work Order Tracking application to perform tasks such as modifying the default material item reservation type setting and changing a material item's required date setting.

Objectives

When you complete this module, you can perform these tasks:
- Name the six reservation types and explain their differences to others
- Perform a setup of the InvResResTypeUpdateCronTask
- Modify an item's reservation type with the Materials application

When you complete this module, you can perform these tasks:

Name the six reservation types and explain their differences to others

Perform a setup of the InvResResTypeUpdateCronTask

Modify an item's reservation type with the Materials application

Reservation can be set as hard or soft

- HARD reservations are controlled by a need to complete work under the restrictions of time. A hard reservation ensures that the balance is either on-hand or is on-hand by the required date of the item.

- SOFT reservations are not time sensitive. The reserved item *might* be needed to complete a task but at the time of reservation creation, it's demand is not critical to a task completion.

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HARD reservations are controlled by a need to complete work under the restriction of time. A hard reservation ensures that the balance is either on-hand or is on-hand by the required date of the item. SOFT reservations are not time sensitive. The reserved item might be needed to complete a task but at the time of reservation creation, it's demand is not critical to a task completion.

Automatic reservation type

- Reservations can be created under automatic processing.
- A reservation type InvResResTypeUpdateCronTask is used to evaluate reservations and modify as necessary.
- 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.

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The reservation can also be set as automatic. The automatic reservation type is determined if the reservation should be set as APHARD or APSOFT based on the required date.

Reservation type can be determined on work order plans (material), desktop requisition line, PR line, and PO line.

Back order functionality

- BACKORDER reservation type is used to indicate when a hard reservation is required
  - Condition for reservation type to be set to BACKORDER:
  - Disallow negative balance
  - Available balance on-hand is insufficient to satisfy a hard reservation

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The BACKORDER reservation type is used to indicate when a hard reservation is required and the quantity on hand cannot be met. ABACKORDER reservation type is set when these conditions apply: Disallow negative balance is checked under inventory default option in Organizations application. The available balance on-hand is insufficient to satisfy a hard reservation.

Set up InvResResTypeUpdateCronTask (1 of 5)

Click **Go To** -> **System Configuration**

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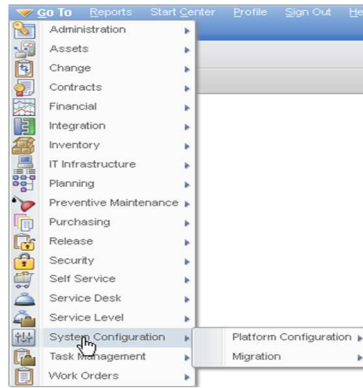
To begin the setup of the InvResResTypeUpdateCronTask click **Go To** -> **System Configuration**.

Set up InvResResTypeUpdateCronTask (2 of 5)

Enter invres in the Cron Task field, press enter on the keyboard. Click InvResResTypeUpdateCronTask.

Set up InvResResTypeUpdateCronTask (3 of 5)

Set the schedule according to your business process. Check the Active checkbox

The cron task should be scheduled to your business process and your needs. Check the Active box and save to start running the cron task.
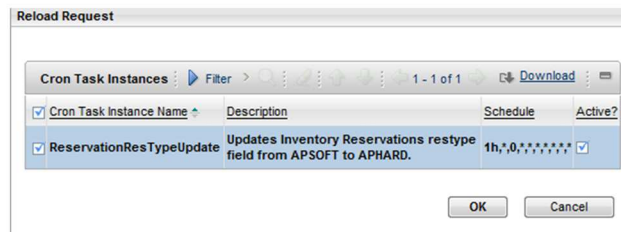
Set up InvResResTypeUpdateCronTask (4 of 5)

Open the **Select Action** menu and click **Reload Request**

Select Action

Reload Request
Delete Cron Task
Add to Bookmarks
Cron Task Admin Job Queue

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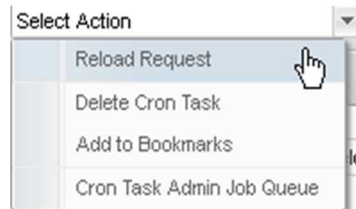
From the Select action menu click **Reload Request**.

Set up InvResResTypeUpdateCronTask (5 of 5)

- Select the InvResResTypeUpdateCronTask check box. Click **OK**

Reload Request

Cron Task Instances	Filter		1 - 1 of 1	Download

Cron Task Instance Name	Description	Schedule	Active?
ReservationResTypeUpdate	Updates Inventory Reservations restype field from APSOFT to APHARD.	1h,*,0,*,*,*,*,*,*	☑

OK   Cancel

Select the InvResResTypeUpdateCronTask check box. Click OK. The cron task will run according to schedule.

Modifying an item's reservation type (1 of 2)

- The default reservation type is set to AUTOMATIC

The default reservation type is set to AUTOMATIC. Make a mental note that when you click the New Row button that the Required Date field is defaulted to the current date and time. Remember to change the current date setting if necessary.

Modifying an item's reservation type (2 of 2)

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You can change an item's reservation type from the default setting of AUTOMATIC to either HARD or SOFT. This is done by clicking on the Reservation Type drop down menu and making a change.

Required date for material reservation

Upon adding a new row, the Required Date field is auto populated with the current date and time. If the Required Date is in the future, use the calendar icon to change the date.

If the Required Date value of the item is greater than the lead time of the item and the reservation type is AUTOMATIC, the reservation type is changed to APSOFT.

If the Required Date value of the item is NOT greater than the lead time of the item and the reservation type is AUTOMATIC, the reservation type is changed to APHARD.

If the Required Date value of the item is greater than the lead time of the item and the reservation type is HARD, the reservation type remains HARD.

If the Required Date value of the item is greater than the lead time of the item and the reservation type is SOFT, the reservation type is changed to SOFT.

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

Name the six reservation types and explain their differences to others

Perform a setup of the InvResResTypeUpdateCronTask

Modify an item's reservation type with the Materials application

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Useful Link

- Maximo Landing Page: http://www-1.ibm.com/support/docview.wss?uid=swg21418666

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hard_soft_reserv.ppt

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