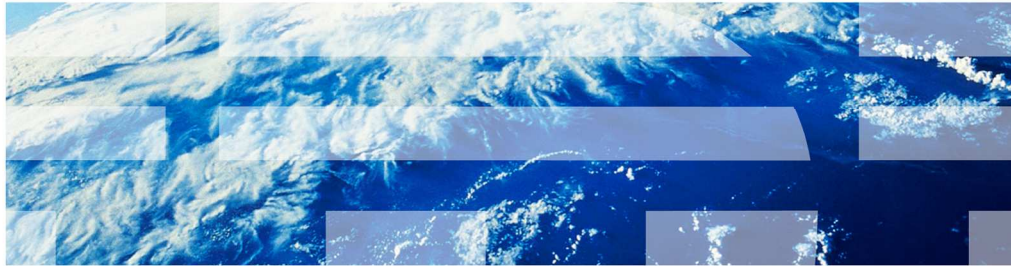


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## IBM Maximo Asset Management version 7.5

How to use HARD and SOFT reservations in work order tracking



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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:

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## 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.

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.

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.

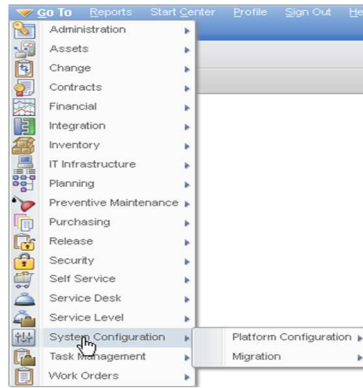
## Back order functionality

- 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

The BACKORDER reservation type is used to indicate when a hard reservation is required and the quantity on hand cannot be met. A BACKORDER 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**



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

## Set up InvResResTypeUpdateCronTask (2 of 5)

The screenshot shows the 'Cron Task Setup' interface. At the top, there is a search bar with 'Find:' and a 'Select Action' dropdown. Below this is a toolbar with icons for list, save, and search. The main area is a table with two columns: 'Cron Task' and 'Description'. The first row has 'invres' in the 'Cron Task' field and an empty 'Description' field. The second row is highlighted in blue and contains 'InvResResTypeUpdateCronTask' in the 'Cron Task' field and 'Crontask to update the the restype field on Inventory reservations. Updates APSOFT to APHARD.' in the 'Description' field. There is a 'Select Records' checkbox at the bottom left of the table.

Cron Task	Description
invres	
InvResResTypeUpdateCronTask	Crontask to update the the restype field on Inventory reservations. Updates APSOFT to APHARD.

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 screenshot displays the 'Cron Task Setup' interface. At the top, there is a navigation bar with 'Bulletin: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find:' and 'Select Action' options. The main content area shows the configuration for a cron task named 'InvResResTyp'. The description is 'Crontask to update the the restype field on Inventory reserva'. The class is 'psdl.app.inventory.InvReservationResTypeUpdateCronTask' and the access level is 'FULL'. Below this is a table of 'Cron Task Instances' with columns for 'Cron Task Instance Name', 'Schedule', 'Run as User', 'Active?', 'Keep History?', and 'Max Number of History Records'. One instance is listed: 'ReservationRt' with a schedule of '1h\*,0\*,\*:\*:\*:\*' and 'MAXADMIN' as the user. The 'Active?' checkbox is checked. Below the table is a 'Details' section for the selected instance, showing the instance name, description, schedule, run as user, and other settings. At the bottom, there is a 'Parameters' section with a table for 'Cron Task Parameters'.

Cron Task Instance Name	Schedule	Run as User	Active?	Keep History?	Max Number of History Records
ReservationRt	1h*,0*,*:*:*:*	MAXADMIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1,000

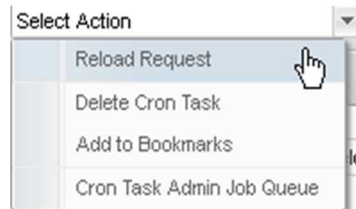
Parameter	Value	Description
...No rows to display...		

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)

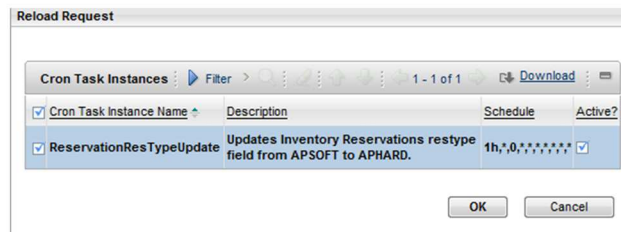
Open the **Select Action** menu and click **Reload Request**



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

## Set up InvResResTypeUpdateCronTask (5 of 5)

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



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 screenshot displays the 'Materials' tab in the IBM Work Order Tracking system. The main table shows a single row for item 560-00, 'Tubing, Copper-1 In ID X .030 In Wall', with a quantity of 1.00, unit cost of 1.49, and line cost of 1.49. The storer room is set to CENTRAL. Below the table, the 'Details' section shows the reservation configuration. The 'Reservation Type' is set to 'AUTOMATIC', and the 'Required Date' is defaulted to '12/31/98 8:00 AM'. Other fields include 'Storer room: CENTRAL', 'Storer room Site: BEDFORD', 'Direct Issue?' (unchecked), 'Vendor', 'Stock Category: STK', 'Condition Code', 'Condition Rate', and 'Condition Enabled?' (unchecked). The 'Requested By' field is set to 'MAX:ADMIN'. At the bottom of the details section, there are buttons for 'Select Materials', 'Select Asset Spare Parts', and 'New Row'.

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)

Labor Materials Services Tools

Materials Filter 1 - 2 of 2 Download

Task	Item	Description	Quantity	Unit Cost	Line Cost	Storeroom	Direct Issue?
	560-00	Tubing, Copper-1 In ID X .030 In Wall	1.00	1.49	1.49	CENTRAL	<input type="checkbox"/>
	GLOVES	Gloves, Disposable Latex	1.00	3.53	3.53	CENTRAL	<input type="checkbox"/>

Details

Task:

Item: GLOVES >> Gloves, Disposable Latex

Line Type: Item

Quantity: 1.00

Order Unit:

Unit Cost: 3.53

Line Cost: 3.53

Storeroom: CENTRAL >>

Storeroom Site: BEDFORD

Reservation Type: AUTOMATIC

Direct Issue?

Vendor:

Stock Category:

Condition Code:

Condition Rate:

Condition Enabled?

PR:

PR Line:

Issue To:

Required Date: 12/31/13 8:00 AM

Requested By: MAXADMIN

Select Materials Select Asset Spare Parts New Row

12 How to Use HARD and SOFT Reservations in Work Order Tracking © 2012 IBM Corporation

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.

The screenshot displays the IBM Work Order Tracking interface. At the top, the title is "Required date for material reservation". Below this, there are tabs for "Labor", "Materials", "Services", and "Tools". The "Materials" tab is active, showing a table with columns: Task, Item, Description, Quantity, Unit Cost, Line Cost, Storeroom, and Direct Issue?. Two rows are visible: one for "Tubing, Copper-1 In ID X .030 In Wall" and another for "GLOVES" (Gloves, Disposable Latex). Below the table, the "Details" section for the selected item "GLOVES" is shown. It includes fields for Task, Item, Quantity (1.00), Order Unit, Unit Cost (3.53), and Line Cost (3.53). On the right side of the details, there are fields for Storeroom (CENTRAL), Storeroom Site (BEDFORD), Reservation Type (AUTOMATIC), Direct Issue? (AUTOMATIC), Vendor (SOFT), Stock Category, Condition Code, Condition Rate, Condition Enabled?, PR, PR Line, Issue To, Required Date (12/31/13 8:00 AM), and Requested By (MAXADMIN). A red arrow points to the "Required Date" field. At the bottom of the interface, there are buttons for "Select Materials", "Select Asset Spare Parts", and "New Row". The footer contains the page number "13", the title "How to Use HARD and SOFT Reservations in Work Order Tracking", and the copyright "© 2012 IBM Corporation".

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.

## Summary

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

- Name the six reservation types and explain their differences to others
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Now that you have completed this module, you can perform these tasks:

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## Useful Link

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



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