

Rotating Assets Process at IPSC

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Overview

The purpose of this document is to describe and lay out the specific steps for creating, issuing, returning, repairing, and decommissioning “Rotating Items/Assets” at IPSC.

A Rotating Item/Asset is any component that may be removed from the field with the intent to repair and re-issue it, most likely, to a different operating location. This document covers:

- **Assumptions and Data Requirements**
- **Setting Up a Rotating Item in Item Master**
- **Replacing a Rotating Item/Asset in the Field**
- **Repairing a Rotating Item/Asset Either at IPSC or at a Vendor**
- **Returning Repaired Rotating Item/Asset back to Inventory**

Assumptions and Data Requirements

This process depends on the following assumptions and data requirements:

- All Rotating Items are in inventory and associated with the **REBUILD** storeroom which represents the storeroom that the Item is normally stocked in, such as the GSB or USB. They are also associated with the **ISOTV** storeroom which represents all repairable items that are at various stages of being refurbished. In the ISOTV storeroom, each Item should have two fixed bins - **IN SHOP** and **AT VENDOR**, plus any number of specific bins where the Items may be placed in the Warehouse while disposition is pending. In summary, all issues for Rotating Items will come from the **REBUILD** storeroom and not the **ISOTV** storeroom.
- All Work Orders have a Planner indicated that is a member of the IPPLANNERS security group. These individuals will receive the notification of the issue of a new Rotating Item/Asset.
- In all cases, Class 62 Rotating Items will have an installed Rotating Item/Asset(s) already in the field and tagged with an Asset ID in which to return to the Warehouse for repair when a new Rotating Item/Asset is issued. All transactions into and out of the Warehouse will have formal 4-digit Asset IDs that will be recorded in Maximo. Asset IDs are created at the time of Receiving. See separate section at the bottom of this document.
- In all cases, Rotating Items that are not Class 62 are considered “dummy” Rotating Assets and will be treated the same as formal Rotating Assets but will utilize the RS##### Asset IDs. These will be auto-generated at the time of Receiving. The same ID can be moved out and back in for any job because the ID is a meaningless reference not intended for use anywhere else in Maximo. See separate section at the bottom of this document for the process to create the dummy Asset IDs at the time of Receiving.

Setting Up a Rotating Item in Item Master

1. For simplification it is assumed as far as this procedure that a valid Item Master record has been previously created, its status is Active, the Rotating? checkbox is checked, the Dummy Rotating Item? checkbox is also checked if not a Class 62 Item, and an inventory record has already been created for the inventory REBUILD storeroom where the Item is issued from normally and also the ISOTV storeroom with bins titled IN SHOP and AT VENDOR. See the following example of an Item Master record properly prepared for this process.

The screenshot shows the Item Master record for Item 101. The item description is "BOARD,PRINTED CIRCUIT, MFG PART NO. 9161301001, I". The status is "ACTIVE". The "Rotating?" checkbox is checked and circled in red. The "Dummy Rotating Item?" checkbox is also checked and circled in red. Other fields include: Item Set: IPITEM, Commodity Group: IPP, Commodity Code: 591000, Associated Buyer: D23849, Class Code: 22, BOM Category: 1, Meter Group: (empty), Meter: (empty), Lot Type: NOLOT, Maximum Quantity Issued: (empty), Procurement Class: (empty), Order Unit: EA, SDS Required? (unchecked), Issue Unit: EA. On the right side, there are several other checkboxes: Condition Enabled? (checked), Kit? (unchecked), Qualified Vendor? (unchecked), Auto-Buy? (unchecked), Capitalized? (unchecked), Inspect on Receipt? (unchecked), Add as Spare Part? (unchecked), Attach to Parent Asset on Issue? (unchecked), and Tax Exempt? (unchecked).

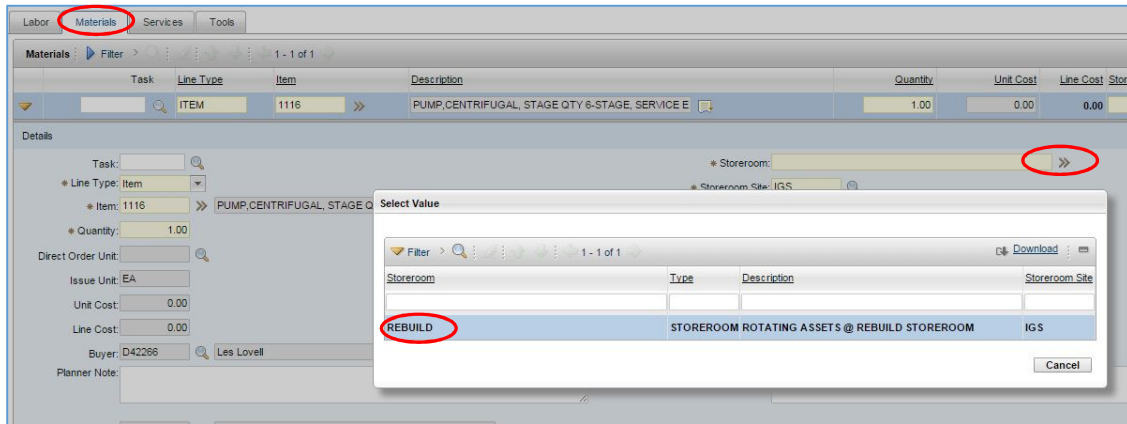
Replacing a Rotating Item/Asset in the Field

Creating a Work Order to Replace the Failed Rotating Item/Asset

1. Create a Work Order (WO) against the failed Location just like you would create any other WO, populating all the necessary fields. This WO's scope should be limited to the replacement of the failed Rotating Item/Asset at the Operating Location (not the repair of the failed Rotating Item/Asset)

The screenshot shows the Work Order Tracking (Nuc) interface. The work order number is 1649. The description is "REMOVE AND REPLACE BAD PUMP", which is circled in red. The location is 1WSG-0, and the asset is 1WSG-0. The estimated cap project value is (empty). The project is (empty). The configuration item is (empty). The equipment group is (empty). The interface includes a search bar, a "Select Action" dropdown, and a menu with options: List, Work Order, Plans, Clearance, Lubrication, Assignments, Related Records, Actuals, Costs, Safety Plan, and Impact Plans.

- Plan the Rotating Item on the Materials sub-tab of the Plans tab, making sure that you are creating the reservation against the REBUILD storeroom where “good” stock is found.



- Process the WO. When the WO is routed to Scheduling, the Planner, or the First Line Supervisor for execution the system will create a reservation for the Rotating Item/Asset in Inventory and will automatically create the Inventory Usage record to issue it.

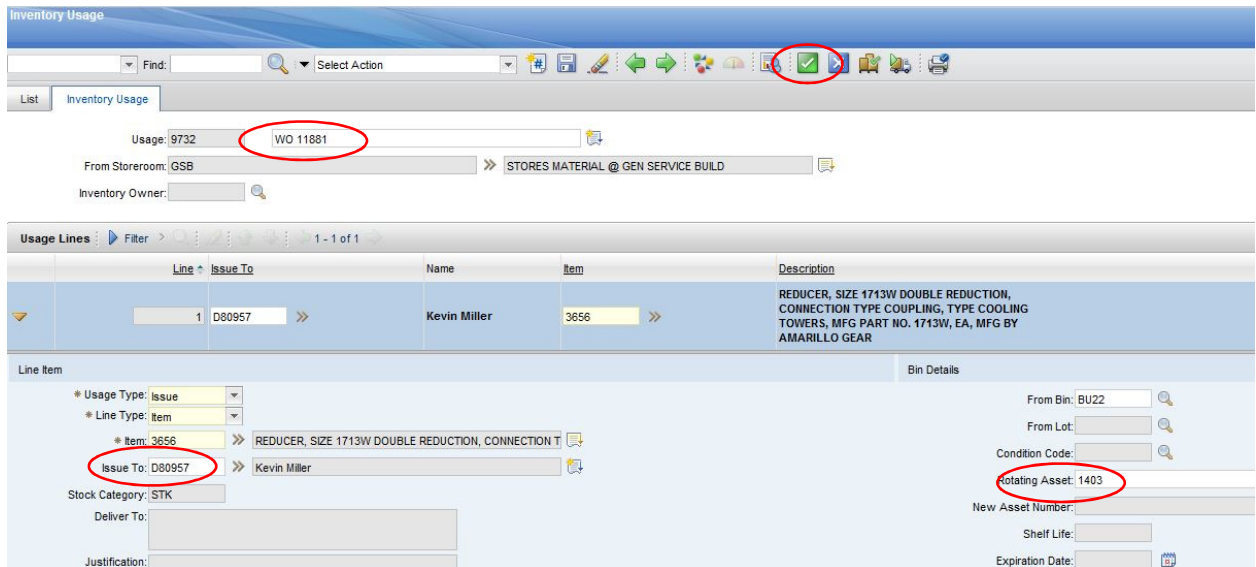
Issue the New Rotating Asset to the Craft

- Warehouse Worker will print a label and attach it to a red tag. Use normal search methods to locate the Inventory Usage record for the WO.
- Open the detail on the Inventory Usage line.
- If the Item is a non-Class 62 (dummy) Rotating Item, select any of the “RS#####” Rotating Item/Assets listed from the popdown in the Rotating Asset field. It won’t matter which one is selected.

If the Item is a Class 62 formal Rotating Item enter the actual Rotating Item/Asset ID of the Item given to the recipient of the Item which is found on the metal tag affixed to the Rotating Item/Asset. Write this same ID on the label affixed to the red tag.

Optionally you may use the Auto-Split feature in Maximo and issue them in bulk.

- Give the labeled red tag to the craftsman when the Item is given to the craftsman.



5. Enter the Dnumber of the recipient of the Item in the “Issued To” field.
6. Click the “Complete Inventory Usage Record” green button at the top of the screen and then in the follow up dialog box click Ok to accept the new status of Complete.
7. At this point, Maximo will generate an email notification to the Planner of the original WO which will contain the Item number, WO number, and the Asset ID that was issued for later processing of getting the Rotating Item/Asset rebuilt after the “bad” Rotating Item/Asset is returned to the storeroom. This will serve as the only notification that the Planner will need to create a WO (see below) to get the Rotating Item/Asset repaired and put back into stock.

Return the “Bad” Rotating Item/Asset to the Warehouse

This step will require one of two possible actions by the Warehouse as outlined below depending on whether the Rotating Item/Asset being returned is a Class 62 formal Asset or a non-Class 62 dummy Asset.

1. The Rotating Item/Asset is returned from the field to the Warehouse for repair. The craftsman should supply the red tag which was provided at the time that the Rotating Item/Asset was issued.
2. Warehouse Worker will find a bin location within the rebuild staging area (RS or RP bin location). They will complete the red tag and record the location ISOTV, row bin location, and the date returned to the Warehouse. Red tag will then be forwarded to the Storekeeper.
3. From the Assets (Nuc) application the Storekeeper will transfer the Asset ID to the ISOTV storeroom as follows:
 - a. If the Item is a non-Class 62 (dummy) Rotating Item, enter the Item number in the Rotating Item field on the List tab and press Enter. This will return a list of all the Assets tied to that Item number and all will be in the form “RS#####”. Click on any Asset ID number that is not tied to a Warehouse storeroom Location. The Location field is on the List tab as well. There will always be at least one record that is in an Operating Location because one was issued up front. Click on one of the Asset IDs and bring up the record. It won’t matter which Asset ID is selected since it is a meaningless number.

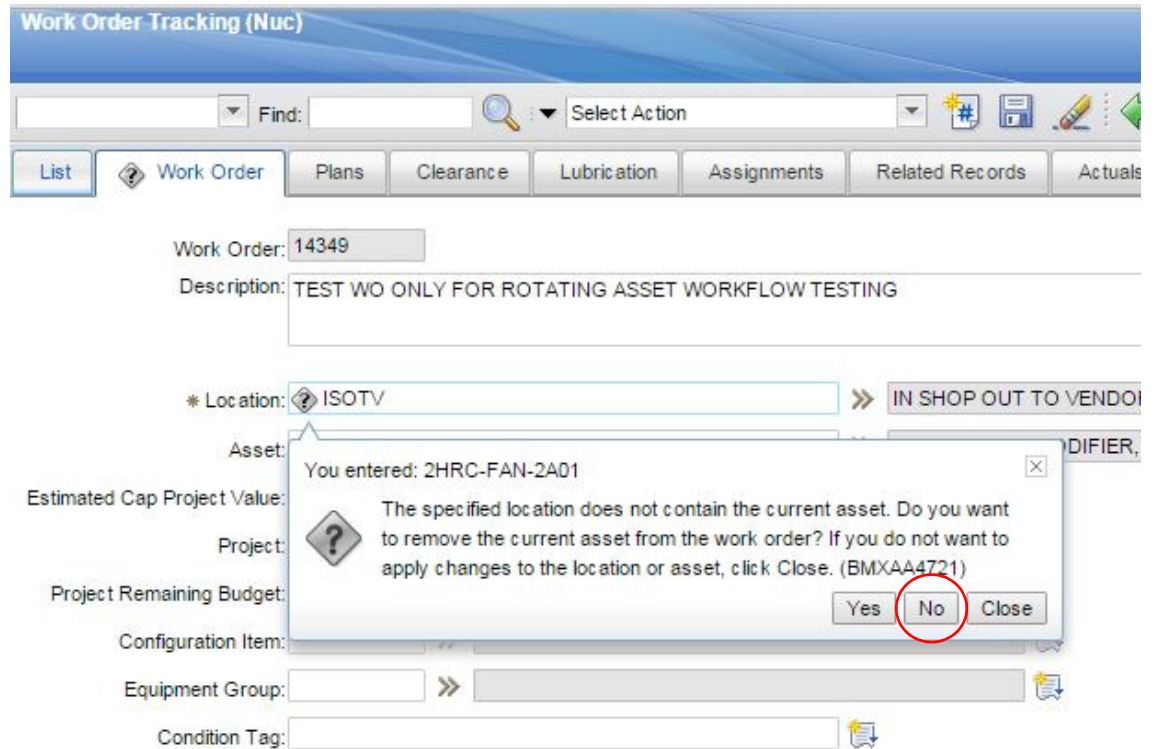
- b. If the Item is a Class 62 formal Rotating Item enter the actual Asset ID of the Item given to the Warehouse Worker which is found on the metal tag affixed to the Asset. Enter this Asset ID in the Asset field on the List tab and press Enter. Then click on the Asset ID to bring up the record.
4. After selecting the proper Asset from either 3a or 3b above the Storekeeper then selects the "Move/Swap Assets" option under Select Action.
5. Enter "ISOTV" in the "To Location" Field.
6. Enter the specific bin in the needs repair staging area in the "Bin" field.
7. Select "Ok". You will receive a message stating the Asset was moved successfully. It is now in the "ISOTV" storeroom balance at the bin specified.
8. Reattach the red tag to the returned Rotating Item/Asset.

Repairing a Rotating Item/Asset Either at IPSC or at a Vendor

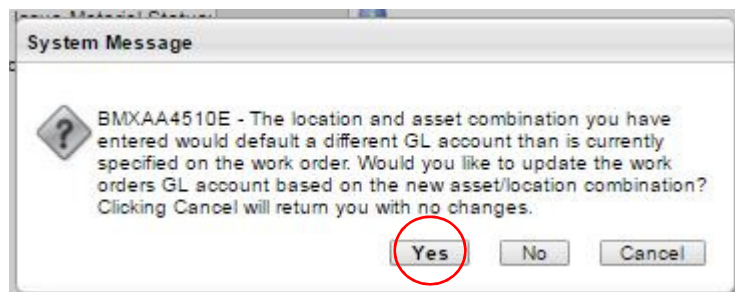
Planner to Create the Repair Work Order

Note: You will need to create an individual WO for each asset repaired.

1. Go to Work Order Tracking and create a new "child" WO against the "Bad" Rotating Item/Asset just like you would create any other WO. Enter the Parent WO that was used to draw the Item out initially in the Parent WO field identifying the child relationship. This WO's scope should be limited to the repair of the failed Rotating Item/Asset in the Shop or by a Vendor (not the replacement of the Rotating Item/Asset in the field). Use the WO Work Type of REB - Rebuilds.
2. Enter the Asset number into the WO record (Location field will automatically populate to ISOTV since that is the current location of the asset). There are two kinds of Rotating Item/Assets, Class 62 formal and non-Class 62 dummy.
 - a. For the formal Rotating Item/Assets the Asset number to enter is the physical unique Asset ID that was returned from the operating unit to the Warehouse. This ID is found on the Asset tag affixed to the equipment. This should be visually confirmed by looking at the equipment.
 - b. For the dummy Rotating Item/Asset the Asset number to enter is the Asset ID that was contained in the email notification. It begins with RS#####. This is the same number that was issued but is not relevant and can be reused. This will prevent having to create additional assets on the fly.
3. **IMPORTANT! - Enter the Location, GL Account, and Labor Accounts from the original WO as follows.** The cost to repair the Asset gets charged to the equipment where it originally failed.
 - a. With the proper Asset showing change the Location to the Location of the original WO. When you attempt this you will receive the following dialog when you click on the black question mark. It is notifying you that the Asset is not located in the Location you are trying to enter. It is ok because in this case we want the Location charged the repair cost rather than the ISOTV Storeroom. Answer NO.



- b. After you change the Location, the GL Account will automatically change to match. You will see a follow-up dialog shown below. Answer Yes to this question.



- c. Final WO record should look like this and note that the "Charge to Store" is cleared:

Work Order: 13761
 Description: SEND OFF THE FAILED CTF 2A01 GEARBOX TO VENDOR. ASSET 1377

* Location: 2HRC-FAN-2A01 >> CT FAN 2A01
 Asset: 1377 >> REDUCER,NO MODIFIER, 1713W DOUBLE REDUCTION, COUPL

Project: 15-1HRX.07 >> Cooling Tower Fans Maintenance - Cycle Heat Rejection (1Hf)

Configuration Item: >>
 Equipment Group: >>
 Condition Tag: >>
 Parent WO: >>
 Fabrication PR Num: >>
 Classification: >>
 Class Description: >>
 Commitment: >>
 Work Location: >>
 Modes: >>
 MER: >>
 Launch Entry Name: >>

Plant System: >>
 Power Block?: >>
 Safety Division: >>
 Instrument Channel: >>
 Class: WORKORDER
 * Work Type: CM >> Correctiv
 Work Category: >>
 GL Account: 2HRX-503 >>
 Labor Account: 2HRX-101 >>
 Failure Class: >>
 Problem Code: >>
 As Found Code: >>
 Storeroom Material Status: >>
 Direct Issue Material Status: >>
 Work Package Material Status: >>
 Material Status Last Updated: >>

Details
 Job Plan: >>
 Job Plan Revision #: >>
 PM: >>
 WO Completion Code: >>
 Partial Performance?: >>
 Retest?: >>
 Part of PM Sequence?: >>

Asset Details
 Asset Up?
 Warranties Exist?
 SLA Applied?
 Charge to Store?
 Exception?
 Completion Code: >>
 Completion Date: >>

Priority
 Asset/Location
 Priority Justi
 Risk Asses

4. Populate all the required and remaining necessary WO fields as you would any other WO adding any items or materials to the Plans tab needed to make the repairs. Determine if the repair will be done by IPSC or by a vendor and take the following action:

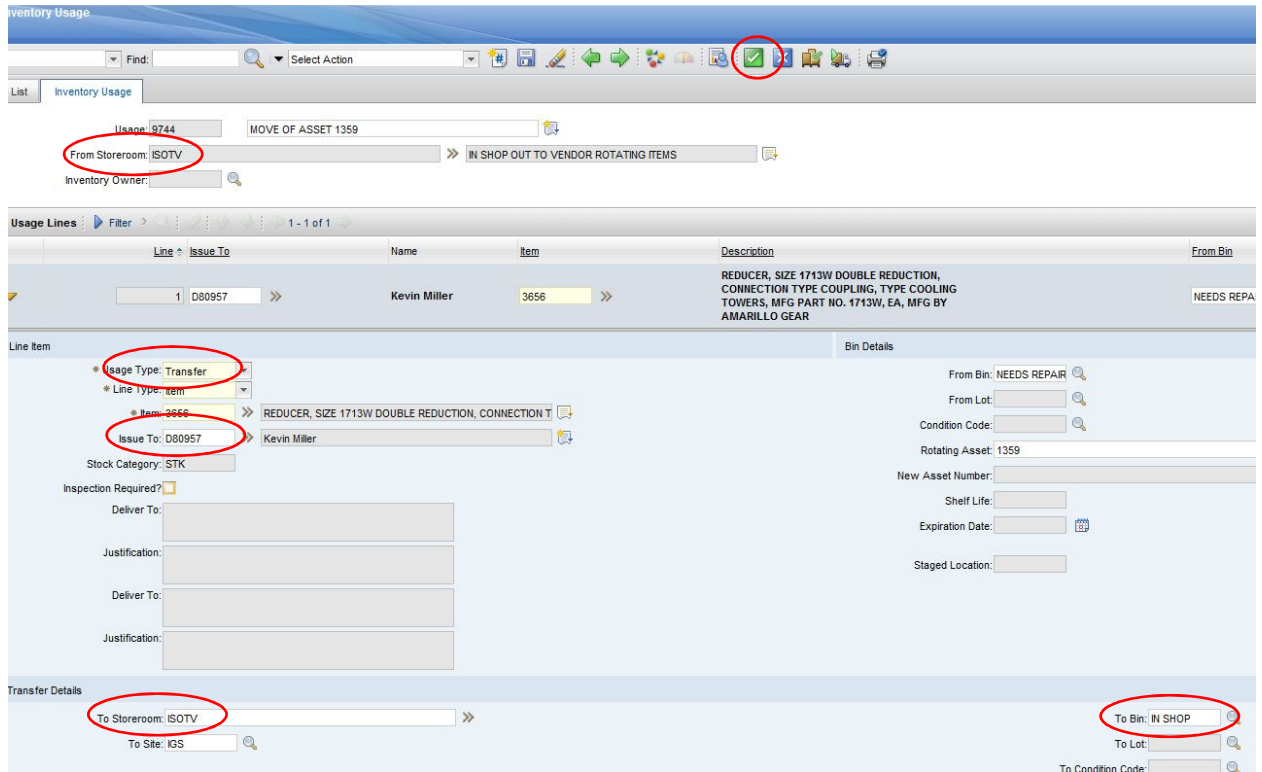
- a. If the Rotating Item/Asset is being repaired by IPSC the Planner can route the WO to Scheduling for execution by the area crew when everything is in place and material needed is available. Change the GL Account extension to -401 if necessary.
- b. If the Rotating Item/Asset is being repaired by a vendor the following additional steps are required:
 - i. Change the default GL Account extension on the WO to -503 (see above pic).
 - ii. Plan the Materials or Services sub tabs on the Plans tab to create the necessary PR for Purchasing to process the outside service. Use the Materials sub-tab if there is a tangible item that will be received such as a rebuilt gearbox. Use the Services sub-tab if there is nothing to receive and is truly a service such as rebuilding an installed valve.

IMPORTANT!! In the Deliver To reference the Item number so when the rebuilt part is returned the Warehouse will know to restock that Item.

- iii. Planner should enter Crew 31 on the WO tab and enter his own Dnumber as the Supervisor and Owner. This way upon completion by the vendor the Planner can complete and audit the WO himself since it does not affect the Front Line Supervisor. Note: Make sure you route the WO to yourself and hold until the Rotating Item/Asset is returned. This routing is imperative to get the WO into a correct status to trigger the PR creation.
5. Complete the Work Order as per normal procedures, issuing parts and recording labor, as needed.

Transfer Asset from Awaiting Repair Bin to IN SHOP Bin if IPSC is Making the Repair

1. A craft worker will come to the Warehouse requesting the Rotating Item/Asset to repair. The Warehouse Worker will then look up the rotating item which is in the ISOTV storeroom and obtain the row bin location from the inventory record.
2. Create a new Inventory Usage record. Provide a brief description such as "Transfer Asset ##### to IN SHOP".
3. Enter ISOTV as the "From Storeroom".
4. Change the Usage Type to TRANSFER.
5. Select "New Row" in the lines section.
6. Enter the Item Number in the Item Number field and press Tab.
7. Enter the repair Bin as the "From Bin" which was obtained in Step 1 above.
8. Enter the Dnumber of the person who is picking up the Rotating Item/Asset in the "Issue To" field.
9. Enter ISOTV as the "To Storeroom".
10. Enter IN SHOP as the "To Bin"
11. In the Rotating Asset field click on the detail menu and choose Select Value. Select the actual tagged Asset being pulled from the pending "Bad" repair bin.
Note: if this is a non-Class 62 dummy rotating item, where serial numbers are not tracked, it does not matter which one of the RS##### numbers you select.
12. Select the "Complete Inventory Usage Record" green button at the top of the screen and then in the follow up dialog box click Ok to accept the new status of Complete.



Transfer Asset from Awaiting Repair Bin to AT VENDOR Bin if Vendor is Making the Repair (similar to above section)

1. Upon receipt of a shipping document from Purchasing for offsite repair of an asset the Warehouse Worker creates a new Inventory Usage record.
2. Provide a brief description such as "Transfer Asset ##### to AT VENDOR".
3. Enter ISOTV as the "From Storeroom".
4. Change the Usage Type to TRANSFER.
5. Select "New Row" in the lines section
6. Enter the Item Number in the Item Number field and press Tab.
7. Enter the repair Bin as the "From Bin".
8. Enter the Dnumber of the person in Receiving who you give the Rotating Item/Asset to in the "Issue To" field.
9. Enter ISOTV as the "To Storeroom".
10. Enter AT VENDOR as the "To Bin"
11. In the Rotating Asset field click on the detail menu and choose Select Value. Select the actual tagged Asset being pulled from the pending "Bad" repair bin.
Note: if this is a non-Class 62 dummy rotating item, where serial numbers are not tracked, it does not matter which one of the RS##### numbers you select.
12. Select the "Complete Inventory Usage Record" green button at the top of the screen and then in the follow up dialog box click Ok to accept the new status of Complete.

Returning Repaired Items back to Inventory


Transfer Repaired Asset from ISOTV (IN SHOP Bin) to Primary Storeroom (Default Bin)

(Note: This step should only be done when the Warehouse Worker has physically received the refurbished Rotating Item/Asset from the IPSC craft person who made the repairs)

1. Warehouse Worker receives the Rotating Item/Asset from the craftsman and fills out the internal Rotating Stocking form and delivers it to the Storekeeper.
2. The Storekeeper then creates a new Inventory Usage record.
3. Provide a brief description such as "Transfer asset ##### to back to Inventory"
4. Enter "ISOTV" as the "From Storeroom".
5. Change the Usage Type to "TRANSFER".
6. Select "New Row" in the lines section
7. Enter the Item Number in the Item Number field and press Tab.
8. Enter "IN SHOP" as the "From Bin".
9. Enter the Dnumber of the person who delivered the repaired Rotating Item/Asset back to the Warehouse Issue Window in the "Issued To" field.
10. Enter "[ACTUAL STOREROOM]" as the "To Storeroom".
11. Optionally, update the "To Bin" if necessary. The form filled out by the Warehouse Worker will contain the bin location where the Item was stocked.



12. In the Rotating Asset field, select the Asset being pulled from the IN SHOP bin.
(Note: if this is a dummy Rotating Item/Asset, it does not matter which one you select. If this is a Class 62 Rotating Item/Asset, enter the Asset ID from the Asset tag affixed to the equipment.)
13. Select the "Complete Inventory Usage Record" green button at the top of the screen and then in the follow up dialog box click Ok to accept the new status of Complete.



Transfer Repaired Asset from ISOTV (AT VENDOR Bin) to Primary Storeroom (Default Bin)

(Note: This step should only be done when the Warehouse Worker has physically received the refurbished Rotating Item/Asset at the Receiving Dock from a formal PO.

1. Go To Inventory Usage application and follow the exact steps above which are identical. Substitute the "IN SHOP" bin in Step 8 with "AT VENDOR".

Note to Warehouse: If craftsman states that the rotating item is to be scrapped or is unrepairable, the craftsman must work with Planning to complete the Decommissioned Asset tracking form.

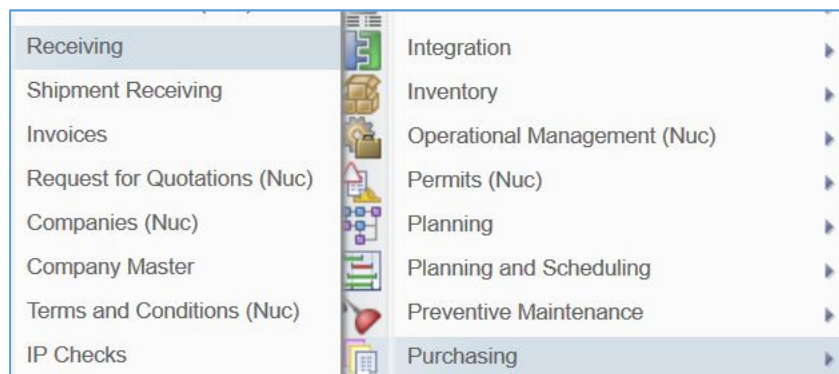
Note to Planners: You should hold onto the email notification until you have seen that the Item has been returned and back into inventory because it may not come back and will need your action. If an asset is scrapped out either in the field or if the vendor scrapped it out this item will possibly need to be reordered. Rebuilt Items do not automatically get reordered because a repaired asset is always expected to come back. If a scrap occurs the Planner is responsible to notify the Warehouse Supervisors to reorder that particular asset. Do this by filling out the Decommissioned Asset tracking form located at network location s:\planners\planning documents.

EXTRAS

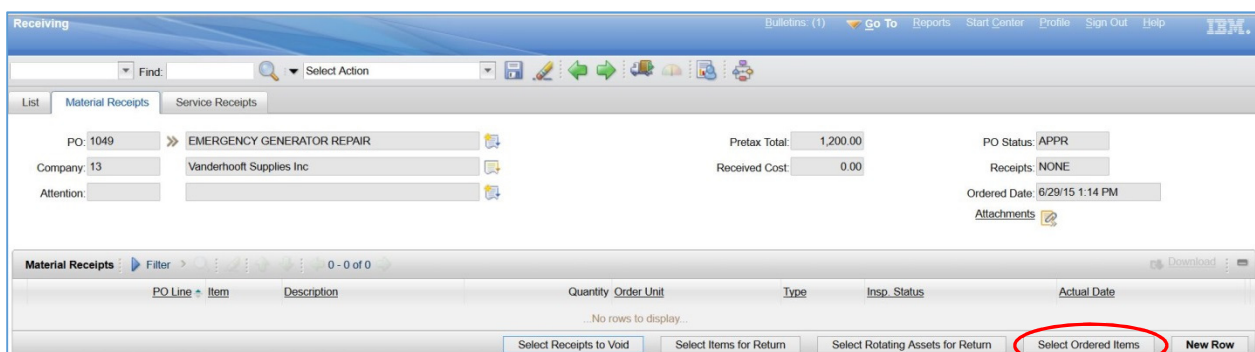
Create Rotating Asset IDs at Receiving

(Assumes ordered on a Purchase Order)

1. Go to the Receiving application



2. In the Receiving Application, find the Open PO where the Rotating Asset order exists.
3. Click on "Select Ordered Items" button.



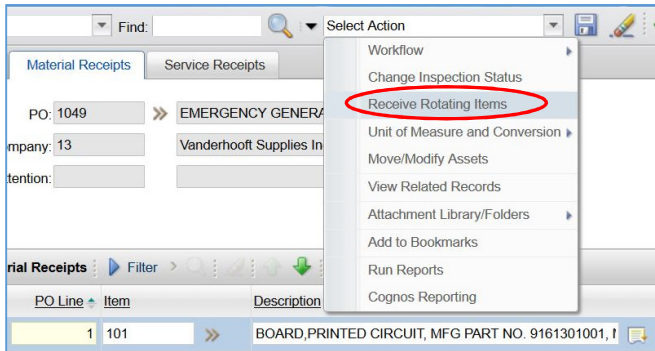
4. Place check mark next to Item Line.

PO Line	Item	Description	Packing Slip	To Storeroom	Quantity Due	Quantity Ordered	Invoice
<input checked="" type="checkbox"/>	1 101	BOARD,PRINTED CIRCUIT, MFG PART NO. 9161301001, MFG BY BASLER ELECTRIC		GSB	1.00	1.00	

5. Save the record. (Note the status of WASSET.)

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date
1	101	BOARD,PRINTED CIRCUIT, MFG PART NO. 9161301001, I	1.00	EA	RECEIPT	WASSET	6/29/15 1:41 PM

6. From Select Actions, Select “Receive Rotating Items”.



7. Select the “Generate IDs” button. (Note if this is a Class 62 item, skip this step - see step 11.)
8. Select the “Assign IDs” button. (Note the “RS” prefix.)
9. Select “OK.”
10. Items have been received into the selected Storeroom’s Default Bin.
11. If you are receiving a Class 62 Item you will need to select a four-digit Asset ID tag from the prefabricated tags located in Receiving, affix it to the Item, and then enter the Asset ID number into the Maximo Receiving record along with relevant Item serial number if available. Do not auto-generate this number.

Scrapping Rotating Asset/Items

1. If the Rotating Item/Asset determination is made to not repair the asset then the Planner must fill out the Request To Decommission Rotating Item/Asset which is located in the network location of S:\Planners. Work directly with the Storekeeper or Warehouse Supervisor to disposition this properly. This is permanent removal from the operating Location and Inventory.
2. If the item needs to be reordered so note it on the request form in step 1 above and it will be included in the next reorder.