

# Item Reorder Process at IPSC

## Contents

- Overview ..... 2
- Assumptions and Data Requirements ..... 2
- The Item Reorder Process at IPSC..... 2

## Overview

The purpose of this document is to describe and lay out the specific steps for running the Item Reorder Process through Maximo at IPSC.

This document covers:

- **Assumptions and Data Requirements**
- **The Item Reorder Process**
- **Using the Preview Window to manage items to temporarily “hold” from reorder.**
- **External list of items not to be reordered at present time.**
- **Turning on/off option to automatically reorder items.**

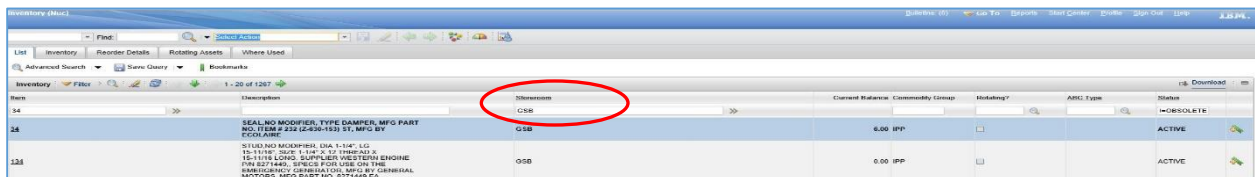
## Assumptions and Data Requirements

These process depend on the following assumptions and data requirements:

- Users will use the Preview window of the Reorder Process to manually create a list (outside of Maximo) for items to be put on “hold” (not to be reordered at this time).
- Users will delete the items put on “hold” from the reorder Preview Window.
- Users will access the Inventory Records from the manual list and change the Reorder Flag to “N” (unchecked) until these items will need to be ordered again. The Reorder Flag will be set to “Y” (checked) to reorder the item(s) again.
- Users will use the **Critical Items List** report to view and manage the process of items that are due for reorder but do not have the Reorder Flag set to “Y” (checked).

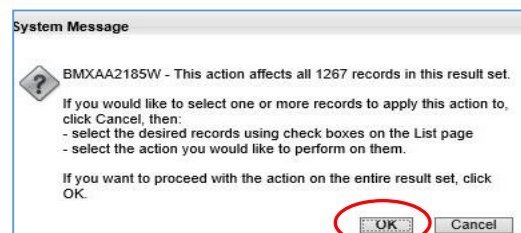
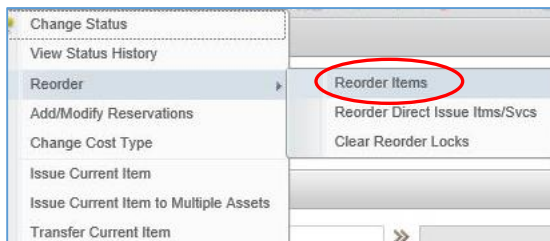
## The Item Reorder Process at IPSC

1. Go to the Inventory Application and filter the list screen for the desired Storeroom.



Item	Description	Reorder	Current Balance	Connectivity Group	Holdings?	ARC Type	Status
24	SEAL, NO MODIFIER, TYPE DAMPER, MFG PART NO. ITEM # 254 0201020 ST. MFG BY F00JALBE	Y	6.00	IPP			ACTIVE
123	2145 NO MODIFIER, USA 1-1/4" LG 10-1118F, SIZE 1-1/4" X 2-1/8" DIA 10-1118 LONG SLIPPER VESTERON ENGINE PRE-ESTAB. SPKS F00JALBE ON THE EMERGENCY CRITICALITY MFG BY GENERAL MOTORS, MFG PART NO. 027448 EA	Y	0.00	IPP			ACTIVE

2. Select “Reorder Items” from the Reorder Select Action Menu. Click OK on the System Message window stating that it is ok to run the action on the entire list.



3. Click on the “Preview” Button of the Reorder Process Window.

**Reorder Range**

Storeroom: GSB >> STORES MATERIAL @ GEN SERVICE

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?

Include Soft Reservations?

**Reorder Runtime Option**

Run in Background Mode?  E-mail Address Notification: rdelgado@edatai.com

**Preview** Run Reorder Cancel

4. While looking at the “Preview” window of what to reorder, create a list (outside of Maximo) of any items you want to remove from the Reorder List at this time.
  - a. **Option:** Click on the “Download” button for the preview list and Open/Save the Excel worksheet of the preview list. Highlight the rows in the worksheet for the items you want to delete from the Maximo Reorder List. Sort the Excel worksheet by highlighted rows. Delete all non-highlighted rows from the Excel worksheet. The Excel worksheet will now contain the rows for deletion in the Maximo Reorder List.
  - b. **Option:** Use an external application such as: Notepad, Microsoft word, Microsoft Excel to list the item number(s) to be temporarily removed from the Reorder Process. Ensure the storeroom, date and any notes are included to assist in the process of including the item(s) on the Reorder Process at a later date.

**Reorder Items Detail**

Filter > 1 - 18 of 39 >> Download

Item	Description	Condition Code	Current Balance	Order Unit	Average Cost	Hold Reorder?	Reorder Quantity
134	STUD,NO MODIFIER, DIA 1-1/4", LG 15-11/16", SIZE 1-1/4" X 12 THREAD X 15-11/16 LONG. SUPPLIER WESTERN ENGINE P/N 8271449,, SPECS FOR USE ON THE EMERGENCY GENERATOR, MFG BY GENERAL MOTORS, MFG PART NO. 8271449 EA		0.00	EA	0.00	<input type="checkbox"/>	2.00
34	SEAL,NO MODIFIER, TYPE DAMPER, MFG PART NO. ITEM # 232 (Z-630-153) ST, MFG BY ECOLAIRE		6.00	EA	0.00	<input type="checkbox"/>	8.00
340	O-RING,NO MODIFIER, DEVICE DESIGNATION AS568A-392, ID 23 IN, OD 23-3/8 IN, WD 3/16 IN, ABRASIVE MTL RUBBER, TYPE CONDENSATE PUMP, MFG PART NO. 20A11-C-M-392, MFG BY INGERSOLL RAND		3.00	EA	0.00	<input type="checkbox"/>	17.00
	RING,NO MODIFIER, ABRASIVE MTL BRASS,						

5. Use the “Trash Can” icon to remove those item(s) from the preview list that will not be reordered at this time.

3408	MODULE,NO MODIFIER, TYPE OUTPUT, REED RELAY, 8 CHANNEL, 8 N/O, POWER SUPPLY 115 VAC, MFG PART NO. AS-B266-501, MFG BY GOULD	0.00	EA	0.00	<input type="checkbox"/>	2.00	
434	RING,NO MODIFIER, ABRASIVE MTL BRASS, TYPE LEVEL, USED FOR BFPT, LUBE OIL CONDITIONING EQUIPMENT, MFG PART NO. 521872-3, MFG BY DELAVAL EA	0.00	EA	0.00	<input type="checkbox"/>	1.00	
3455	REDUCER, SPEED	0.00	EA	0.00	<input type="checkbox"/>	1.00	
13418	STEM,VALVE, VALVE STYLE 667-EHD PLUG, VALVE SZ 03.00", SER. 9039974-977, ABRASIVE MTL ALLOY, MFG PART NO. 10A9265X392 EA, MFG BY FISHER VALVES	0.00	EA	0.00	<input type="checkbox"/>	1.00	
18434	VALVE, 12.00 GATE	0.00	EA	0.00	<input type="checkbox"/>	1.00	
20034	BOARD,PRINTED CIRCUIT, FUNCTION CPU EA, MFG PART NO. 008728 EA, MFG BY RAMSEY	0.00	EA	0.00	<input type="checkbox"/>	1.00	
28034	MECHANISM,NO MODIFIER, TYPE OPERATING, CIRCUIT BREAKER, 7.5HK, 1200/2000 AMP, MFG PART NO. 194111-T7, MFG BY ABB	0.00	EA	0.00	<input type="checkbox"/>	1.00	
28340	SUPPLY, POWER (MODICON)	0.00	EA	0.00	<input type="checkbox"/>	4.00	

6. Complete the reorder process with the remaining items.

434	TYPE LEVEL, USED FOR BFPT, LUBE OIL CONDITIONING EQUIPMENT, MFG PART NO. 521872-3, MFG BY DELAVAL EA	0.00	EA	0.00	<input type="checkbox"/>	1.00	
3455	REDUCER, SPEED	0.00	EA	0.00	<input type="checkbox"/>	1.00	
13418	STEM,VALVE, VALVE STYLE 667-EHD PLUG, VALVE SZ 03.00", SER. 9039974-977, ABRASIVE MTL ALLOY, MFG PART NO. 10A9265X392 EA, MFG BY FISHER VALVES	0.00	EA	0.00	<input type="checkbox"/>	1.00	
18434	VALVE, 12.00 GATE	0.00	EA	0.00	<input type="checkbox"/>	1.00	
20034	BOARD,PRINTED CIRCUIT, FUNCTION CPU EA, MFG PART NO. 008728 EA, MFG BY RAMSEY	0.00	EA	0.00	<input type="checkbox"/>	1.00	
28034	MECHANISM,NO MODIFIER, TYPE OPERATING, CIRCUIT BREAKER, 7.5HK, 1200/2000 AMP, MFG PART NO. 194111-T7, MFG BY ABB	0.00	EA	0.00	<input type="checkbox"/>	1.00	
28340	SUPPLY, POWER (MODICON)	0.00	EA	0.00	<input type="checkbox"/>	4.00	

7. Once the reorder process has been processed, search for the individual Inventory records that you deleted from the reorder list (should be on your external notepad or optional application) and set the "Reorder?" checkbox for the item(s) on the Reorder Details tab to 'N' (unchecked). These items will no longer show up in the reorder process until they are set to 'Y' (checked) again.

List   Inventory   **Reorder Details**   Rotating Assets   Where Used

Item: 34 >> SEAL,NO MODIFIER, TYPE DAMPER, MFG PART NO. ITE

Storeroom: GSB >> STORES MATERIAL @ GEN SERVICE

<p><b>Reorder Details</b></p> <p>Reorder? <input type="checkbox"/></p> <p>* Reorder Point: 8.00</p> <p>* Lead Time (Days): 28</p> <p>Safety Stock:</p> <p>* Economic Order Quantity: 8.00</p> <p>Order Unit: EA</p>	<p><b>Primary Vendor</b></p> <p>Primary Vendor: &gt;&gt;</p> <p>Manufacturer: &gt;&gt;</p> <p>Model:</p> <p>Catalog #:</p>
---	--

8. When needed, run the "Critical Items List" from the Run Reports menu to get a report of all of the items that are due for reorder but not currently set to reorder.

9. When you want the reorder process to include the item(s) again, go to the Inventory Application record for the item(s) and change the “Reorder?” checkbox back to ‘Y’ (checked) and when the reorder process is previewed, the item(s) will show on the preview list again.

List	Inventory	Reorder Details	Rotating Assets	Where Used
Item: 34		SEAL,NO MODIFIER, TYPE DAMPER, MFG PART NO. ITE		
Storeroom: GSB		STORES MATERIAL @ GEN SERVICE		
<b>Reorder Details</b>		<b>Primary Vendor</b>		
Reorder? <input checked="" type="checkbox"/>		Primary Vendor: <input type="text"/>		
* Reorder Point: 8.00		Manufacturer: <input type="text"/>		
* Lead Time (Days): 28		Model: <input type="text"/>		
Safety Stock: <input type="text"/>		Catalog #: <input type="text"/>		
* Economic Order Quantity: 8.00				
Order Unit: EA				