



Taking Stock

Implementing and Integrating Inventory in 8.9

Session 27377
March 1, 2010
12:45 – 1:45



Your Presenter

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– Business Analyst





Florida State University



Current enrollment 40,255



FSU and Oracle PeopleSoft

- **Financials 8.4 Implementation July 2004**
- **Upgrade to 8.9 November 2006**
 - MP5 applied April 2007
- **Upgrade to 9.0 April 2009**
- **Financials Modules include:**
 - GL with Commitment Control
 - Accounts Receivable/Billing
 - Purchasing/ePro (w/workflow)
 - Asset Management
 - Projects/Grants/Contracts
 - Travel & Expense (w/workflow)
 - Accounts Payable
 - Inventory/Cost Management



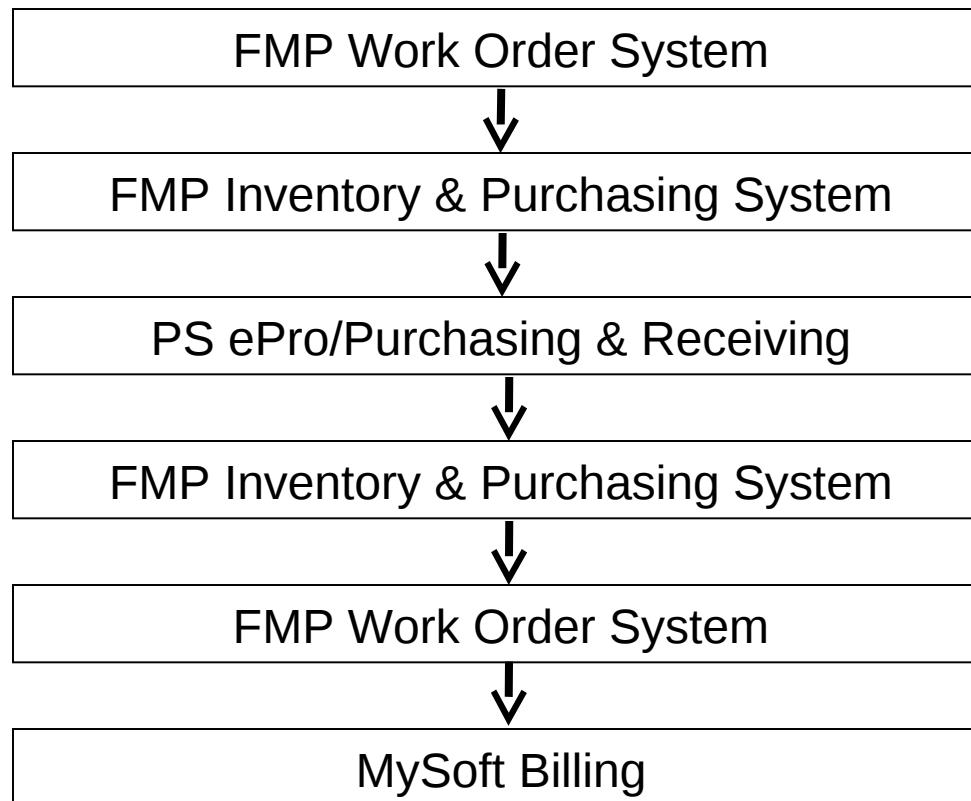
Session Overview

- **Project background and objectives**
- **Functionality used**
- **Maintenance Management overview**
- **Maintenance Management integration with Inventory**
- **Maintenance Management integration with Purchasing**
- **Inventory integration with Purchasing**



Project Background and Objectives

Legacy Systems and Process Flow





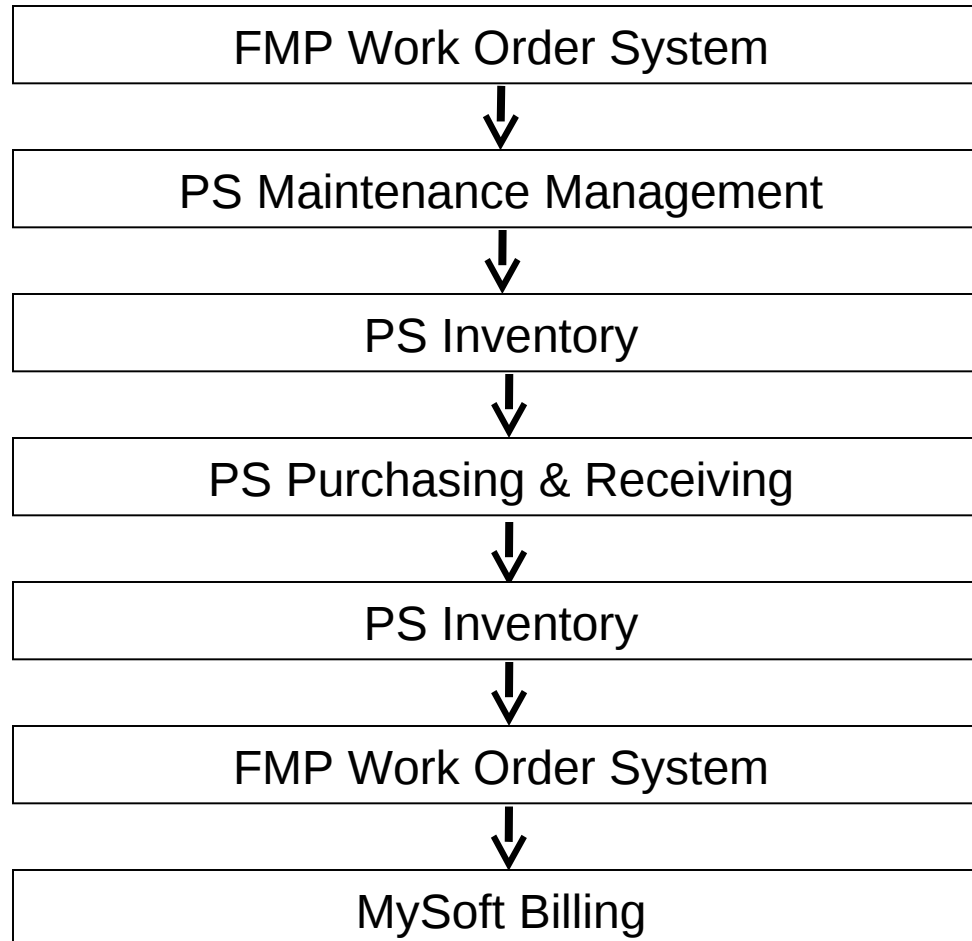
Project Background and Objectives

- **Overview and mission**
 - Implementation was specific to the our Office of Telecommunications
- **Goals**
 - Reduce redundancy, increase inventory control, and improve audit trails
- **Scope**
 - Inventory
 - Cost Accounting
 - Utilize items
 - Maintenance Management



Project Background and Objectives

New Process Flow





Functionality Used

Maintenance Management

- **Established Item Master**
- **Custom interface**
 - FMP Work Order system to PS MM
 - Header level information
- **Two types of demand:**
 - Inventory
 - Purchase/On-Hand
- **Two integration points:**
 - Inventory module
 - Purchasing module

Inventory

- **Replenishment**
- **Picking**
- **Putaways**
- **Issue to work orders**
- **Inventory counts**



Maintenance Management Overview

Work Order Header

Maintenance Management > Work Orders > Work Order (tab)

Work Order

Requirements

Schedules

Actuals

Cost

Miscellaneous

Work Order:

TSR684510

Created On:

*Description:

LEARNING SYSTEMS INSTITUTE (LSI) - RESEARCH FOUNDATION WEST (RF2) - 2010 LEVY AVE

Created By:

Status:

Open

As of 12/16/2009

Required Start:

12/16/2009

End:

12/16/2010

*Work Order Type:

Telephone Service f

Duration:

1

Hours

*Priority:

Medium

Service Request Unit:

*Shop:

OTC

Office of Telecommunications

Service Request:

By:

Approval Status:

Approved

Attachments

Supplemental Data

Notes

AM Bus Unit:

Area ID:

Asset ID:

Asset Criticality:

Asset Location:

Job Templates

Asset Details

Work Order Tasks

Customize | Find | View All |

First 1-2 of 2 Last

Main

Additional Task Information

Timetable

Resources

Asset Information

Additional Asset Information

*Sequence

*Description

Asset ID

Status

Duplicate this Task

1

100

CASS

Open

☐

2

200

Networking

Open

☐

Print

Copy To New Work Order

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Add

Up



Maintenance Management Overview

Work Order Requirements

Maintenance Management > Work Orders > Requirements (tab), Inventory

Inventory

Work Order: TSR684510 Status: Open

Work Order Tasks Find | View 1 First 1-2 of 2 Last

Task Number: 1 ☐ Duplicate this Task Required Start: 12/16/2009 8:00AM
*Sequence: 100 Required End: 12/16/2010 5:00PM
*Task Description: CASS Duration: 1 Hours
Status: Open As of 02/16/2010 Dependent Task: Overlap %:
Additional Task Data
Asset Information
Problem Reporting
Labor Inventory Purchase/On-hand Tools Instructions Checklist Attachments Task Templates Supplemental Data Notes

Inventory Requirements Customize | Find | View All First 1 of 1 Last

Line No.	Item ID	Description	Planned Quantity	UOM	Item Type	Delivery Flag	Delivery Instructions
1	ACS001	INDOOR SIREN 2 TONE WALL MOUNT	1.0000	EA	Inventory	<input type="checkbox"/>	Not Specified

Task Number: 2 ☐ Duplicate this Task Required Start: 12/16/2009 8:00AM
*Sequence: 200 Required End: 12/16/2010 5:00PM
*Task Description: Networking Duration: 1 Hours
Status: Open As of 02/16/2010 Dependent Task: Overlap %:
Additional Task Data
Asset Information
Problem Reporting
Labor Inventory Purchase/On-hand Tools Instructions Checklist Attachments Task Templates Supplemental Data Notes

Inventory Requirements Customize | Find | View All First 1 of 1 Last

Line No.	Item ID	Description	Planned Quantity	UOM	Item Type	Delivery Flag	Delivery Instructions
1	IN007	Adapter Bracket	10	EA	Inventory	<input type="checkbox"/>	Not Specified



Maintenance Management Overview

Work Order Requirements

Maintenance Management > Work Orders > Requirements (tab), Purchase/On-Hand

Special
Purchase

[Work Order](#) [Requirements](#) [Schedules](#) [Actuals](#) [Cost](#) [Miscellaneous](#)

Work Order: TSR684510 Status: Open

Work Order Tasks Find | View 1 First 1-2 of 2

Task Number: 1 ☐ Duplicate this Task Required Start: 12/16/2009 8:00AM
*Sequence: 100 Required End: 12/16/2010 5:00PM
*Task Description: CASS Duration: 1 Hours
Status: Open As of 12/16/2009 Dependent Task: Overlap %:
Additional Task Data
Asset Information
Problem Reporting

[Labor](#) [Inventory](#) [Purchase/On-hand](#) [Tools](#) [Instructions](#) [Checklist](#) [Attachments](#) [Task Templates](#) [Supplemental Data](#)

Purchase/On-Hand Requirements Customize | Find | View All | First 1 of 1 Last

Details Default Settings Estimated Cost

Line No.	Item ID	Description	*Resource Type	Planned Quantity	UOM	On-hand	Delivery Flag	Delivery Instructions
		Special purchase for CASS	Material	1.0000	EA	<input type="checkbox"/>	<input type="checkbox"/>	Not Specified

Task Number: 2 ☐ Duplicate this Task Required Start: 12/16/2009 8:00AM
*Sequence: 200 Required End: 12/16/2010 5:00PM
*Task Description: Networking Duration: 1 Hours
Status: Open As of 12/16/2009 Dependent Task: Overlap %:
Additional Task Data
Asset Information
Problem Reporting

[Labor](#) [Inventory](#) [Purchase/On-hand](#) [Tools](#) [Instructions](#) [Checklist](#) [Attachments](#) [Task Templates](#) [Supplemental Data](#)

Purchase/On-Hand Requirements Customize | Find | View All | First 1 of 1 Last

Details Default Settings Estimated Cost

Line No.	Item ID	Description	*Resource Type	Planned Quantity	UOM	On-hand	Delivery Flag	Delivery Instructions
1		Special Purchase for Netw	Material	1	EA	<input type="checkbox"/>	<input type="checkbox"/>	Not Specified



Maintenance Management Overview

Work Order Schedules

Maintenance Management > Work Orders > Schedules (tab)

[Work Order](#) [Requirements](#) **Schedules** [Actuals](#) [Cost](#) [Miscellaneous](#)

Work Order: TSR684510 Status: Open

Schedules for Task Find | View All First 1 of 2 Last

Task Number: 1

*Sequence: 100

*Task Description: CASS

Status: Open As of 12/16/2009

Contact:

[Set Accounts](#)

Required Start: 12/16/2009 8:00AM

Required End: 12/16/2010 5:00PM

Scheduled Start: 12/16/2009 8:00AM

Scheduled End: 12/16/2010 5:00PM

Duration: 1 Hours

Dependent Task:

Overlap %:

Asset Information

Copy From Requirements

Labor **Inventory** [Purchase/On-hand](#) Tools Instructions Checklist Attachments Task Templates Supplemental Data Notes

Item Availability Picking Plan [Picking Plan Setup](#) [Shortage Workbench](#)

☒ Select All ☐ Deselect All

Inventory Schedules Customize | Find | View All First 1 of 1 Last

[Materials](#) [Details](#) [Reservation](#) [Availability](#) [Additional Information](#) [Default Settings](#) [Cost](#) [Distributions](#)

Line No.	Select	Item ID	Description	Scheduled Quantity	UOM	Schedule Needed Date	Planned Quantity	Item Type
1	<input type="checkbox"/>	ACS001	INDOOR SIREN 2 TONE WALL MOUNT	1.0000	EA	12/16/2009		Inventory

Save

Return to Search

Notify

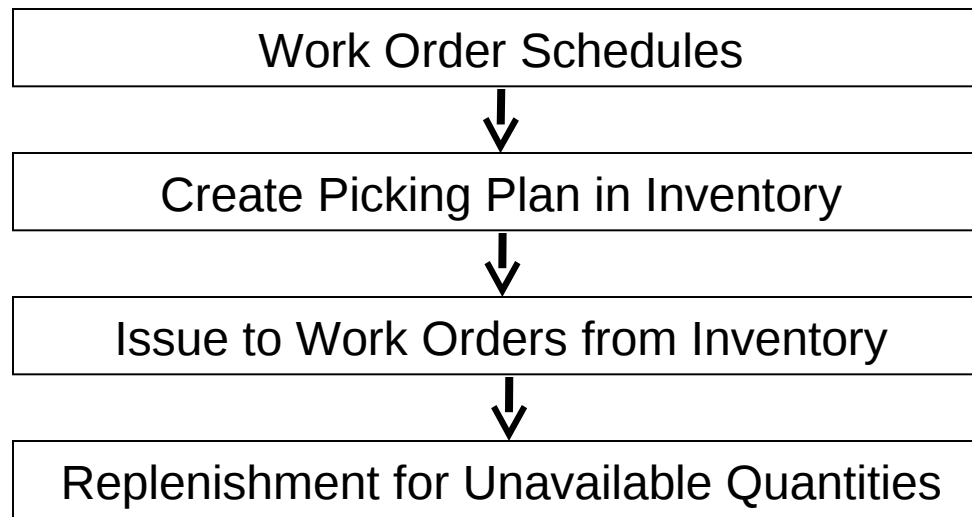
Refresh

[Work Order](#) | [Requirements](#) | [Schedules](#) | [Actuals](#) | [Cost](#) | [Miscellaneous](#)



Maint. Mgmt. Integration with Inventory

Process Flow





Maint. Mgmt. Integration with Inventory

Work Order Schedules

Maintenance Management > Work Orders > Schedules (tab)

Work Order

Requirements

Schedules

Actuals

Cost

Miscellaneous

Work Order: TSR684510Status: Open

Schedules for Task

Find | View AllFirst1 of 2Last

Task Number: 1

*Sequence: 100

*Task Description: CASS

Status: OpenAs of 12/16/2009

Contact:

[Set Accounts](#)

Required Start: 12/16/20098:00AM

Required End: 12/16/20105:00PM

Scheduled Start: 12/16/20098:00AM

Scheduled End: 12/16/20105:00PM

Duration: 1Hours

Dependent Task:

Overlap %:

Asset Information

Copy From Requirements

LaborInventoryPurchase/On-handToolsInstructionsChecklistAttachmentsTask TemplatesSupplemental DataNotes

Item AvailabilityPicking PlanPicking Plan SetupShortage Workbench

☒ Select All☐ Deselect All

Inventory Schedules

Customize | Find | View AllFirst1 of 1Last

Materials

Details

Reservation

Availability

Additional Information

Default Settings

Cost

Distributions

Line No.	Select	Item ID	Description	Scheduled Quantity	UOM	Schedule Needed Date	Planned Quantity	Item Type
1	<input type="checkbox"/>	ACS001	INDOOR SIREN 2 TONE WALL MOUNT	1.0000	EA	12/16/2009		Inventory

Save

Return to Search

Notify

Refresh

[Work Order](#) | [Requirements](#) | [Schedules](#) | [Actuals](#) | [Cost](#) | [Miscellaneous](#)



Maint. Mgmt. Integration with Inventory

Issue to Work Orders from Inventory

Inventory > Fulfill Work Orders > Issue to Work Orders > WO Issue Search (tab)

WO Issue Search

WO Issue Location

WO Issue Summary

*Unit:

*WO Unit:

☐ Return Parts

Pick Batch Selection

Pick Batch ID:

From Pick Line:

To Pick Line:

Work Order

Work Order ID:

Issue Option:

☒ All Tasks

☐ Range of Tasks

Task:

To:

Item ID:

☐ Include Fully Issued Parts

☒ Default Pick Quantity

☐ Include Uncommitted Parts

☒ Set Process to Yes

☒ Set Complete to Yes

Search

Save

Notify

Refresh



Maint. Mgmt. Integration with Inventory

Issue to Work Orders from Inventory

Inventory > Fulfill Work Orders > Issue to Work Orders > WO Issue Location (tab)

Work
Order
Reference

WO Issue Search | **WO Issue Location** | WO Issue Summary

Unit: FSU01 WO Unit: FSU01

Issue to Technician: Apply All Sort By:

Parts List Find | View All First 1 of 1 Last

Work Order: TSR684510 Issue To: Summary

*Task No: CASS Line No: 1 Distrib Type:

*Item ID: Non-Owned: N ChartField Overrides

INDOOR SIREN 2 TONE WALL MOUNT

Quantity Needed: 1.0000

Pick Batch ID: 548

Qty to Issue: 1.0000 EA Pick Line: 1

☒ Pick Line Complete

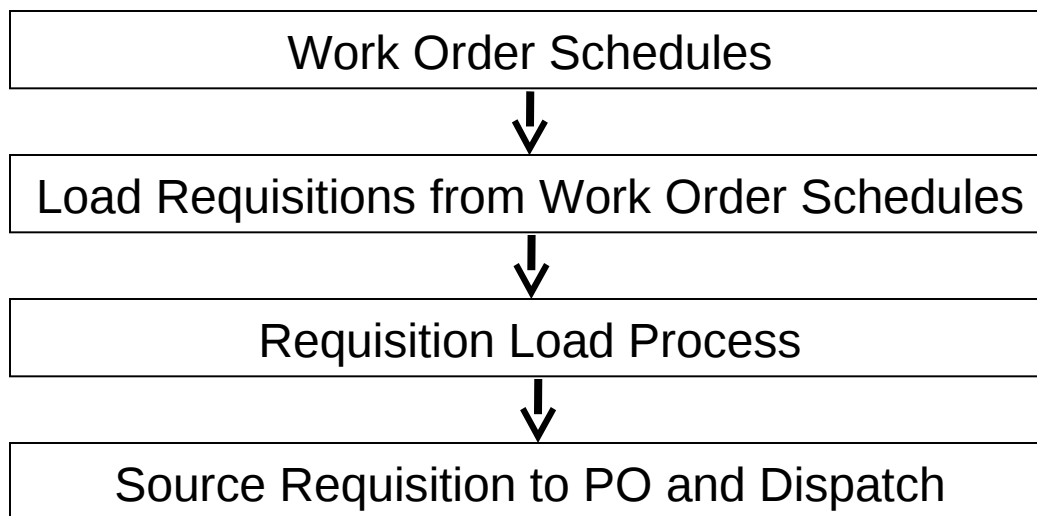
Quantity/Location Information Customize | Find | View All | First 1 of 1 Last

Area	Lev 1	Lev 3	Lev 4	UOM	Issue Qty	Process	Complete
WHS	FLR			EA	<input type="text" value="1.0000"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/>



Maint. Mgmt. Integration with Purchasing

Process Flow





Maint. Mgmt. Integration with Purchasing

Work Order Schedules

Maintenance Management > Work Orders > Schedules (tab)

[Work Order](#) | [Requirements](#) | **Schedules** | [Actuals](#) | [Cost](#) | [Miscellaneous](#)

Work Order: TSR684510 Status: Open

Schedules for Task Find | View All First 1 of 2 Last

Task Number: 1

*Sequence: 100

*Task Description: CASS

Status: Open [As of 12/16/2009](#)

Contact:

[Set Accounts](#)

Required Start: 12/16/2009 8:00AM

Required End: 12/16/2010 5:00PM

Scheduled Start: 12/16/2009 8:00AM

Scheduled End: 12/16/2010 5:00PM

Duration: 1 Hours

Dependent Task:

Overlap %:

▶ Asset Information

Copy From Requirements

[Labor](#) | [Inventory](#) | **[Purchase/On-hand](#)** | [Tools](#) | [Instructions](#) | [Checklist](#) | [Attachments](#) | [Task Templates](#) | [Supplemental Data](#) | [Notes](#)

Item Availability

Add Requisition

Load Requisition(s)

Procurement Inquiry

☒ [Select All](#) ☐ [Deselect All](#)

Purchase/On-Hand Schedules Customize | Find | View All First 1 of 1 Last

[Procurement](#) | [Details](#) | [Availability](#) | **Vendor** | [Default Settings](#) | [Cost](#) | [Distributions](#)

Line No.	Select	Item ID	Description	Planned Quantity	Vendor ID	Vendor Location	Category	Ship To	Location
1	<input type="checkbox"/>	<input type="text"/>	Special purchase for	1.0000	0000000664	001	1010000	SRSB20	SRSB20

Save

Return to Search

Notify

Refresh

[Work Order](#) | [Requirements](#) | [Schedules](#) | [Actuals](#) | [Cost](#) | [Miscellaneous](#)



Maint. Mgmt. Integration with Purchasing

Requisitions Load Process

Purchasing > Requisitions > Load Requisitions

Requisition Loader

Run Control ID: WM_REQLOAD [Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameters

***System Source:**

WM Maintenance Management

***Run Type:**

One Business Unit

***Requesting Loader Bus Unit:**

FSU01 To:

Requisition Request ID:

Replenish ID:

Auto Assign Req ID:

When not specified

Auto Line Numbering:

Auto Assign

***Get Preferred Vendor:**

Always Override

☒ **Create Mult Reqs**

☐ **Copy Item Spec**

Save

Return to Search

Previous in List

Next in List

Notify



Maint. Mgmt. Integration with Purchasing

Requisition Created from a Work Order

Purchasing > Requisitions > Maintain Requisitions

Maintain Requisitions

Requisition

Business Unit: FSU01

Requisition ID: 0000514269

Status: Approved

Budget Status: Not Chk'd

☐ Hold From Further Processing

Header

*Requester: JRENNER

*Requisition Date: 02/17/2010

Origin: ONL

*Currency Code: USD

Accounting Date: 02/17/2010

RENNER, JAMES

Requester Info

FSU ONLINE ENTRY

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Document Status

Amount Summary

Total Amount: 1.00 USD

Add Items From

Select Lines To Display

Purchasing Kit

Item Search

Catalog

Requester Items

Line:

To:

Retrieve

Line

Customize | Find | View All | First 1 of 1 Last

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1		Special purchase for	1.0000	EA	10100000	1.00000	1.00	Approved

View Printable Version

*Go to: ...More...

Save | Return to Search | Notify | Refresh | Add | Update/Disp



Maint. Mgmt. Integration with Purchasing

Requisition Created from a Work Order

Purchasing > Requisitions > Maintain Requisitions > Schedules (link)

Maintain Requisitions

Schedule

Business Unit: FSU01

Requisition Date: 02/17/2010

Requisition ID: 0000514269

Status: Approved

[Return to Main Page](#)

Line

Find | View All

First 1 of 1 Last

1

Item: [Special purchase for CASS](#)

Quantity: 1.0000 Each

Amount: 1.00 USD

Schedule

Customize | Find | View All

First 1 of 1 Last

Details

Maintenance WO

WO Business Unit

Work Order ID

Task Number

Resource Type

Resource Line No.

FSU01

TSR684510

1

Material

1

[Add Ship To Comments](#)

Save

Return to Search

Notify

Refresh

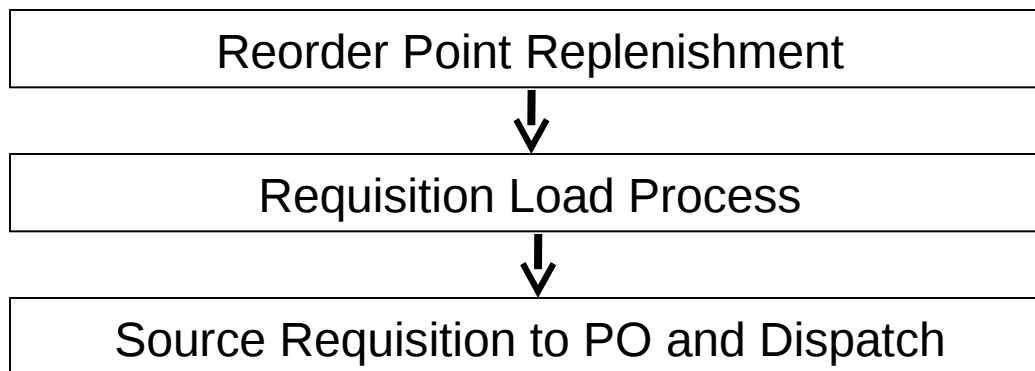
Add

Update/Display



Inventory Integration with Purchasing

Process Flow





Inventory Integration with Purchasing

Reorder Point Replenishment

Inventory > Replenish Inventory > Create Replenishment Requests

Create Replenishment Reqs(AE)

Run Control ID: INV_REPLEN [Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameters [Find](#) | [View All](#) First **1 of 1** Last

Process Frequency [+](#) [-](#)

☐ Once
☒ Always
☐ Don't Run

Request ID: INV_REPLEN
Description: INV_REPLEN

Parameters

*Unit: FSU01 [🔍](#) Replenish Class: [🔍](#)

☒ Dedicated Temp Table Stats

Save **Return to Search** **Previous in List** **Next in List** **Notify**



Inventory Integration with Purchasing

Reorder Point Replenishment

Inventory > Replenish Inventory > Manage Replenishment Requests

Manage Replenishment Requests

Unit:

Replenish Status:

[Search](#) [Sort Display](#) [Report Manager](#)

Replenishment Request [Find](#) | [View All](#) First Last

Replen ID: 174 Reorder Pt

Process Date: 02/17/2010

Item ID: ACS001

User ID: SYSTEM

INDOOR SIREN 2 TONE WALL MOUNT

Location: SRSB218

Reorder Quantity: EA

Source: *

*Status:

Src BU:

Expected By: 03/10/2010

Order No:

Required By:

Requisition Detail

Details

PO Unit:

Requisition ID:

Requisition Line Number:

Requisition Schedule Number:

Requisition Distrib Number:

Save Notify



Inventory Integration with Purchasing

Requisition Load Process

Purchasing > Requisitions > Load Requisitions

Requisition Loader

Run Control ID: INV_REQLOAD [Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameters

***System Source:** **IN Batch**

***Run Type:** ▼

***Requesting Loader Bus Unit:** **To:**

Requisition Request ID:

Replenish ID:

Auto Assign Req ID: ▼ ☒ **Create Mult Reqs**

Auto Line Numbering: ▼ ☐ **Copy Item Spec**

***Get Preferred Vendor:** ▼

Save **Return to Search** **Previous in List** **Next in List** **Notify**



Inventory Integration with Purchasing

Requisition Created from a Work Order

Purchasing > Requisitions > Maintain Requisitions

Maintain Requisitions

Requisition

Business Unit: FSU01

Requisition ID: 0000514277

Status: Approved

Budget Status: Not Chk'd

☐ Hold From Further Processing

Header

*Requester: JRENNER RENNER, JAMES

*Requisition Date: 02/17/2010

Origin: ONL FSU ONLINE ENTRY

*Currency Code: USD Dollar

Accounting Date: 02/17/2010

Requisition Defaults

Add Comments

Requisition Activities

Document Status

Amount Summary

Total Amount: 29.20 USD

Add Items From

Select Lines To Display

Purchasing Kit

Item Search

Catalog

Requester Items

Line: To: Retrieve

Line

Customize | Find | View All | First 1 of 1 Last

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1	ACS001	Mfg #: 747. INDOOR	2.0000	EA	43222500	14.60000	29.20	Approved

View Printable Version

*Go to: ...More...

Save

Return to Search

Notify

Refresh

Add

Update/Dis



Inventory Integration with Purchasing

Requisition Created from a Work Order

Purchasing > Requisitions > Maintain Requisitions > Requisition Defaults (link)

Maintain Requisitions

Requisition Defaults

Business Unit: FSU01 **Requisition Date:** 02/17/2010
Requisition ID: 0000514277 **Status:** Approved

Default Options

☒ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☐ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Buyer: PWSULLIVAN SULLIVAN, PHYLLIS **Unit of Measure:** EA
Vendor: 0000015951 ADT SECURITY SERVICES **Vendor Location:** 001
Category: 43222500 [Vendor Lookup](#)

Schedule

Ship To: SOTCWH1 OTC WAREHOUSE 1 ***Distribute by:** Quantity
Due Date:
Ultimate Use Code: [One Time Address](#)

Distribution

SpeedChart:

Distributions

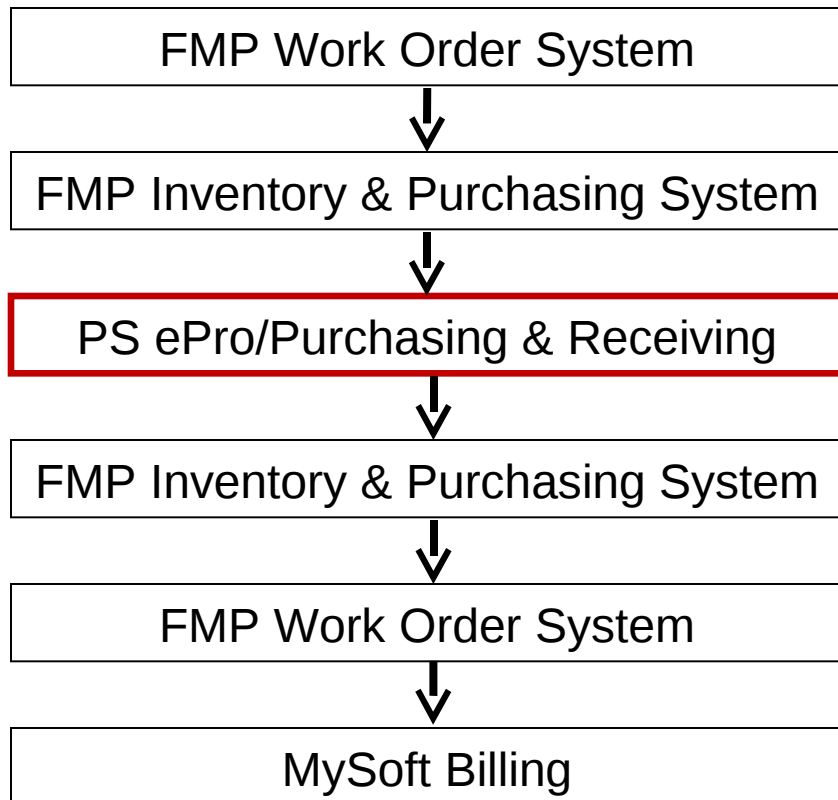
Details **Asset Information** **...**

Dist	Percent	GL Unit	Dept	Fund	IN Unit	PC Bus Unit	Project	Activity	Source Type	Catego
1	100.0000	FSU01	028001	320	FSU01					

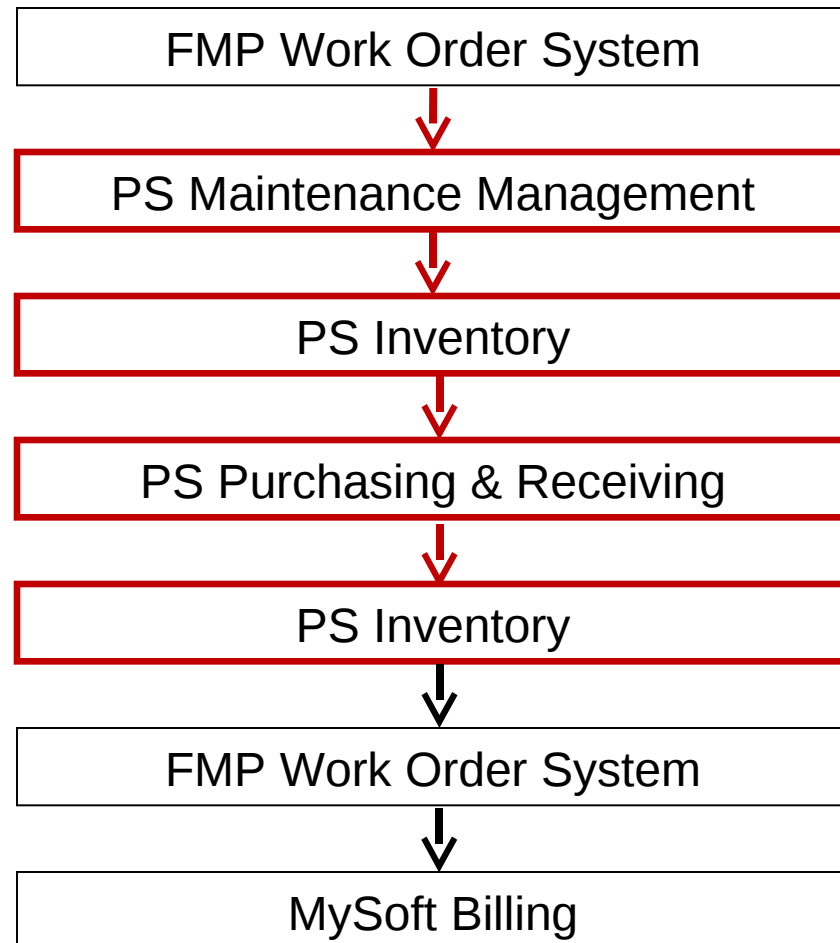


Project Outcomes

Before



After





Questions?

***This presentation and all Alliance 2010 presentations are
available for download from the conference site***

heug.org

Presentations from previous meetings are also available