Taking Stock

Implementing and Integrating Inventory in 8.9

Session 27377

March 1, 2010

12:45 – 1:45

Your Presenter

Maria Whitaker

- Business Analyst

Florida State University

Current enrollment 40,255

FSU and Oracle PeopleSoft

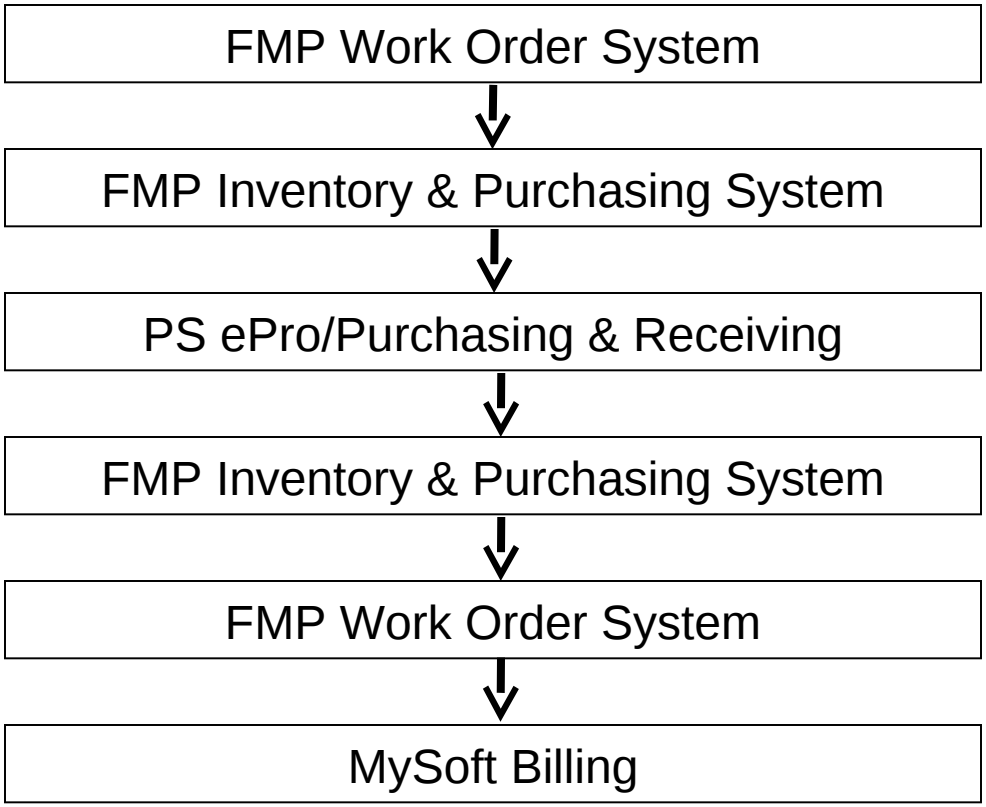
- **Financials 8.4 Implementation July 2004**
- **Upgrade to 8.9 November 2006**
  - MP5 applied April 2007
- **Upgrade to 9.0 April 2009**
- **Financials Modules include**:
  - GL with Commitment Control
  - Accounts Receivable/Billing
  - Purchasing/ePro (w/workflow)
  - Asset Management
  - Projects/Grants/Contracts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

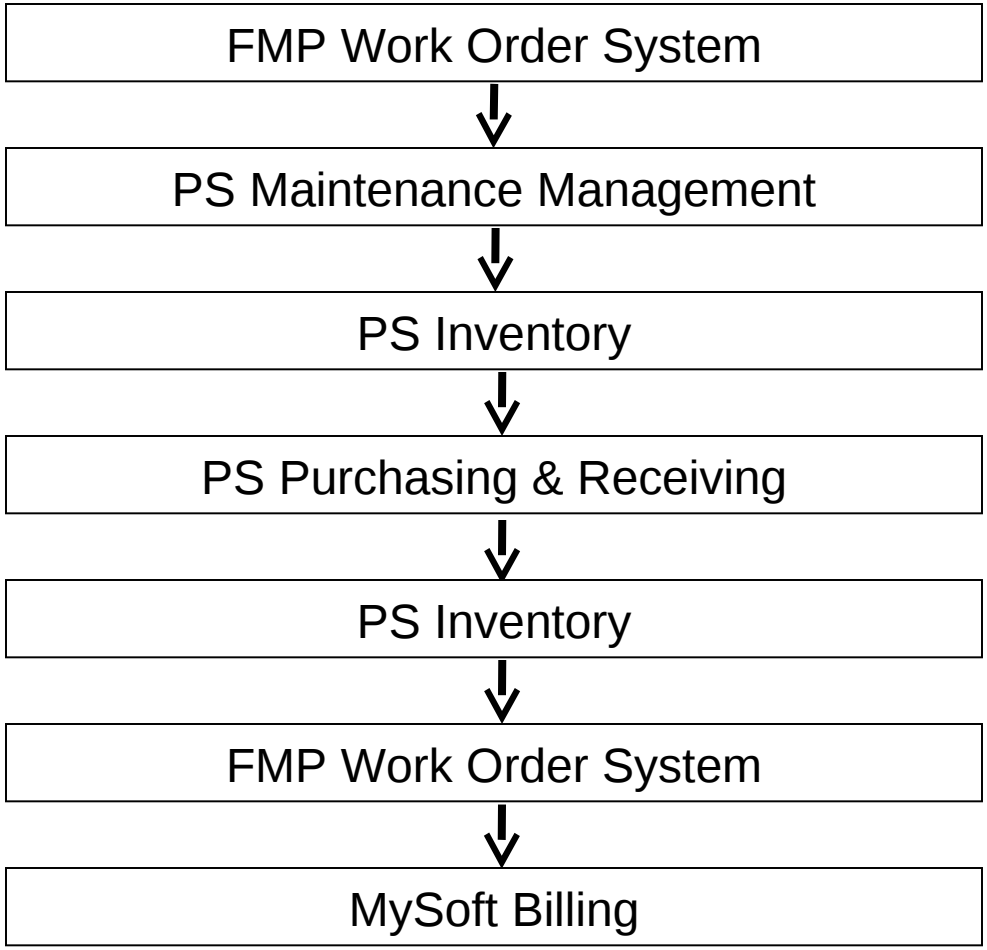


Project Background and Objectives

- **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

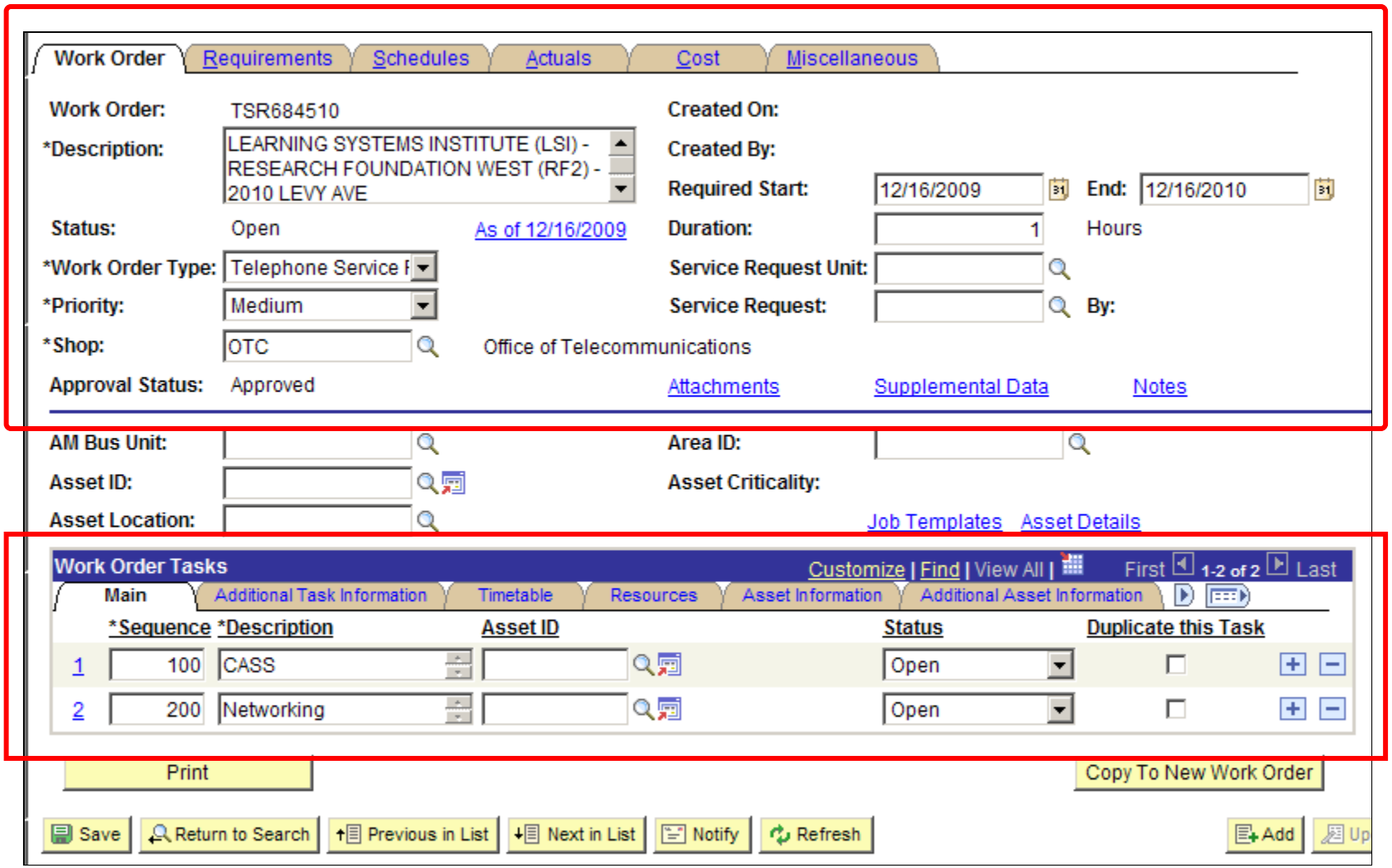
Inventory

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

Maintenance Management Overview

Work Order Header

Maintenance Management > Work Orders > Work Order (tab)

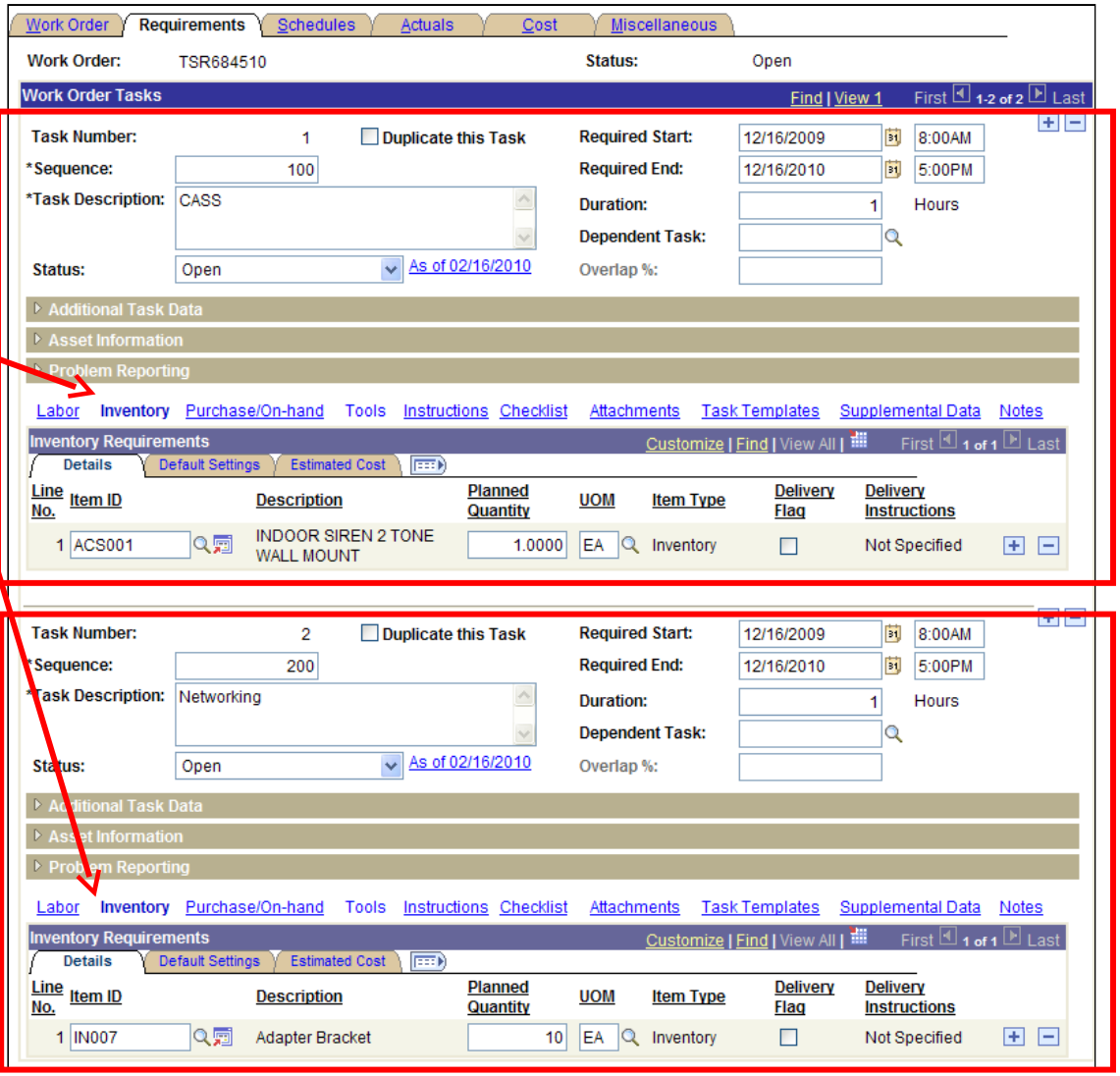


Maintenance Management Overview

Work Order Requirements

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

Inventory

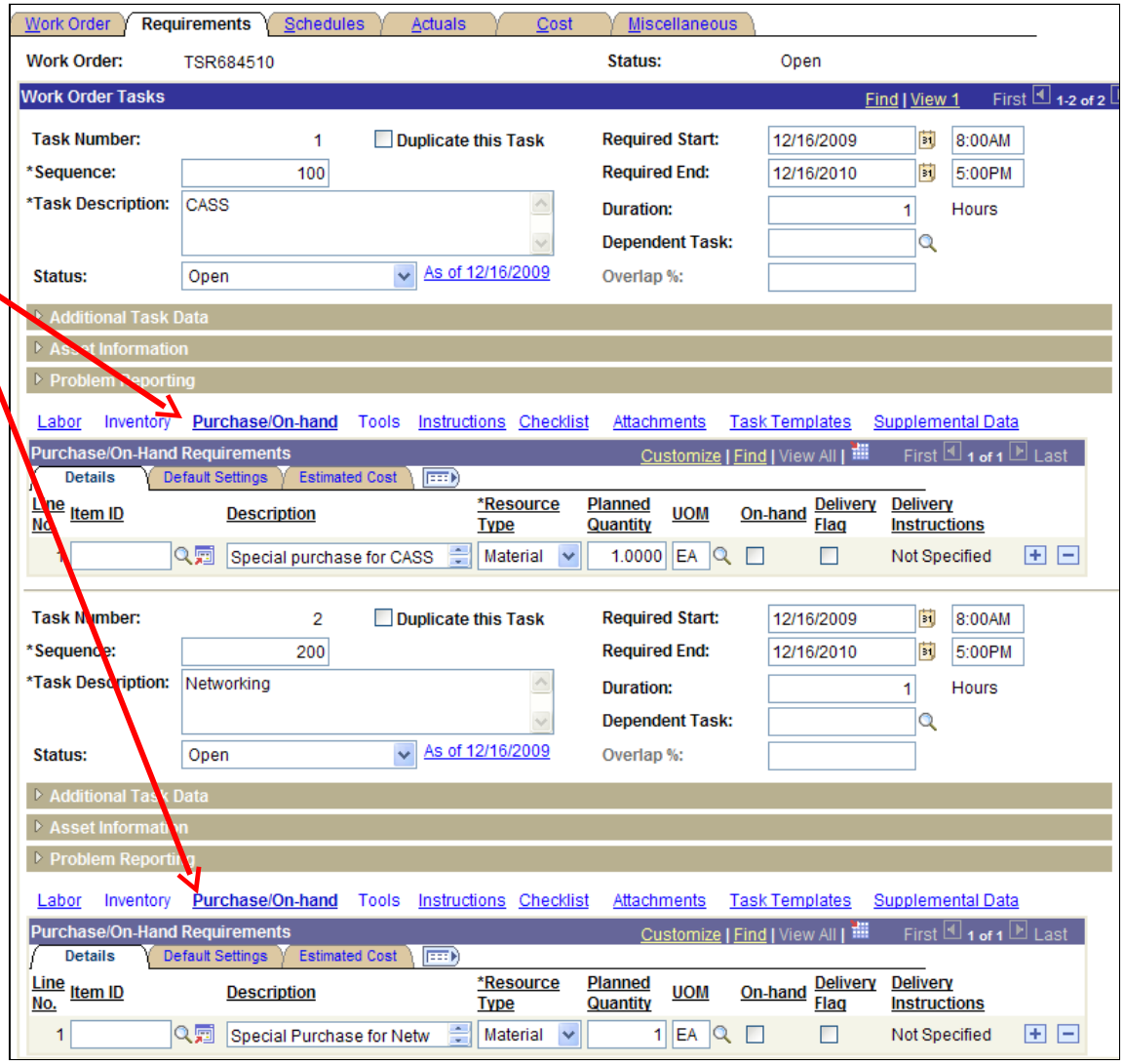


Maintenance Management Overview

Work Order Requirements

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

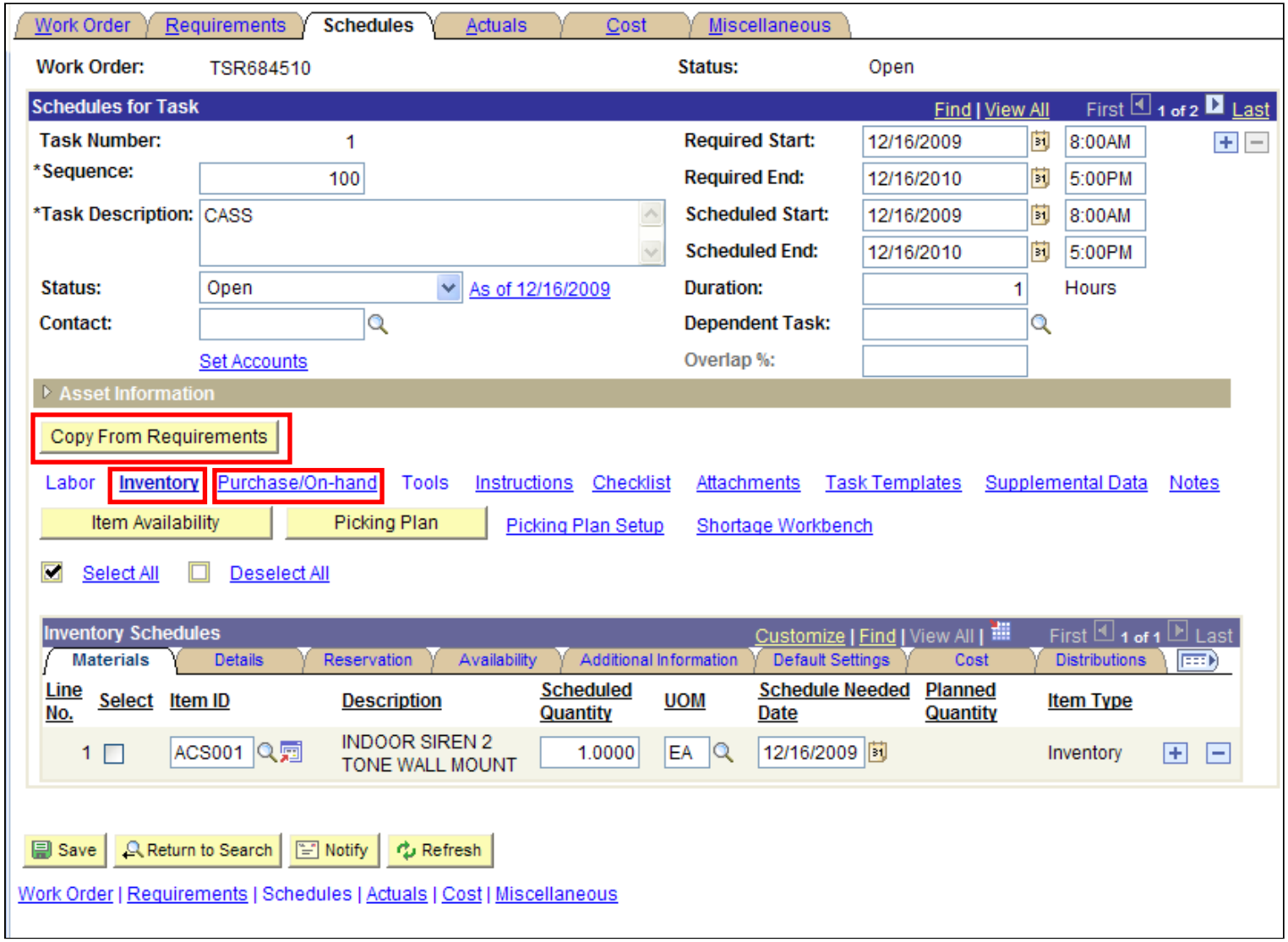
Special Purchase



Maintenance Management Overview

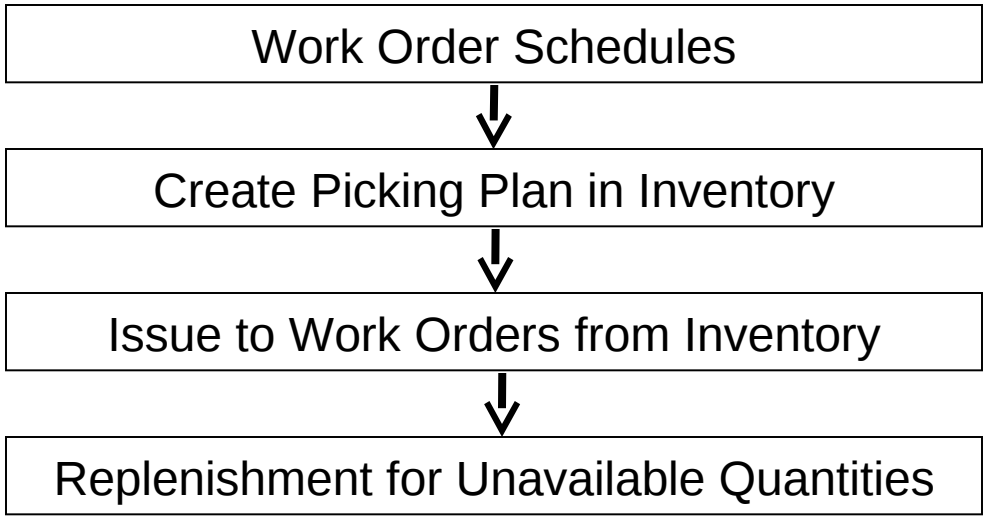
Work Order Schedules

Maintenance Management > Work Orders > Schedules (tab)



Maint. Mgmt. Integration with Inventory

Process Flow



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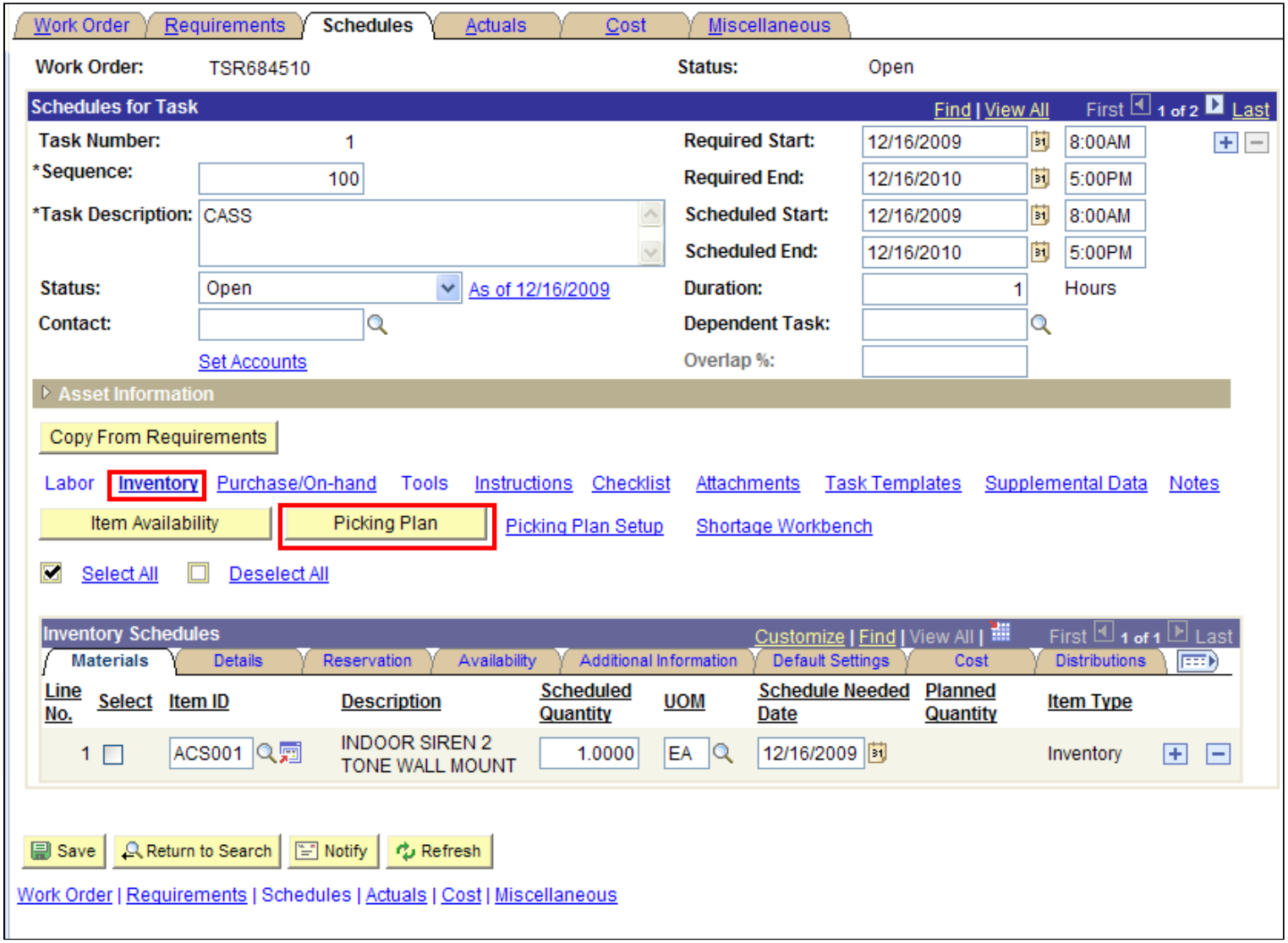
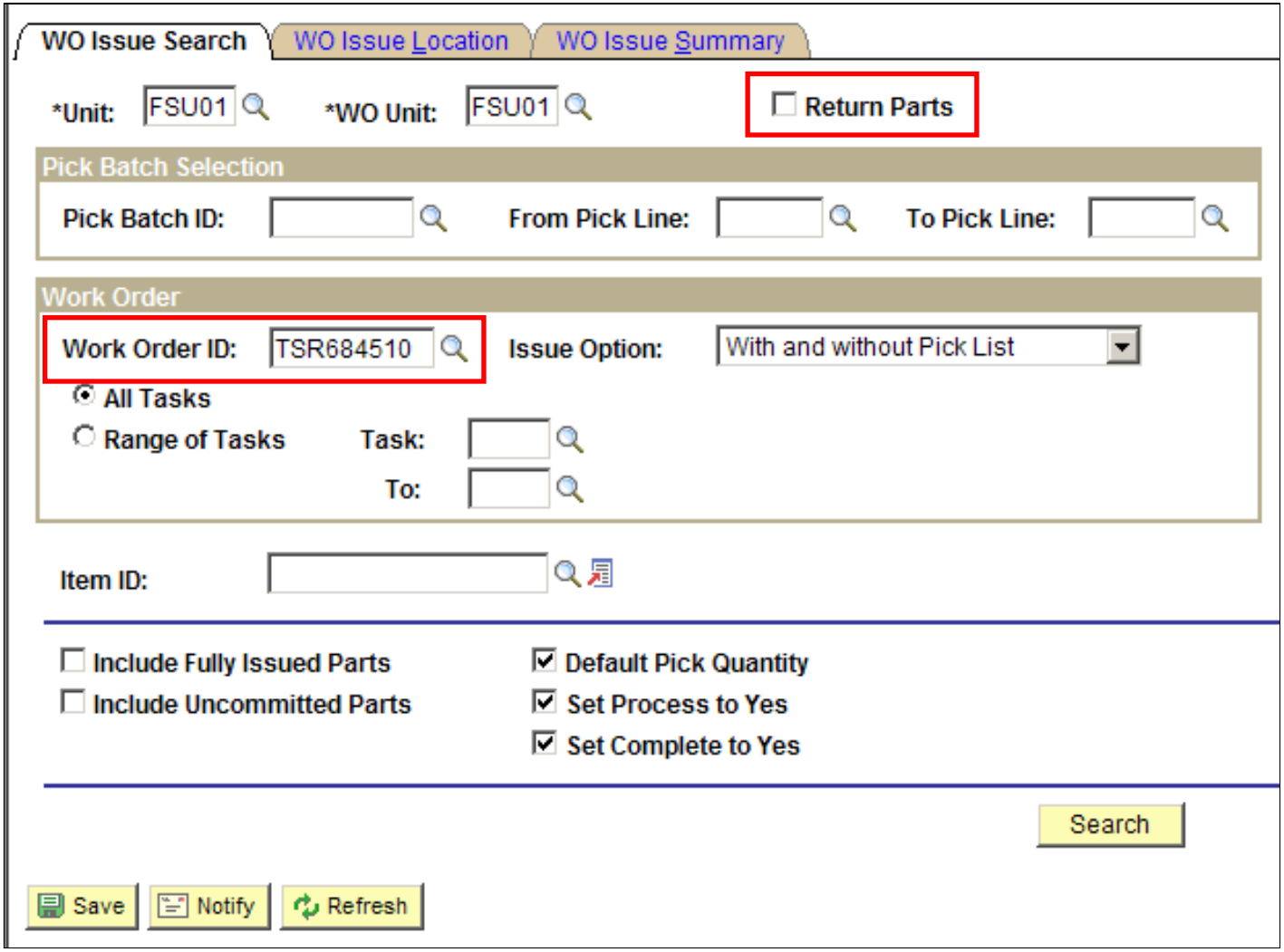


Maint. Mgmt. Integration with Inventory

Issue to Work Orders from Inventory

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

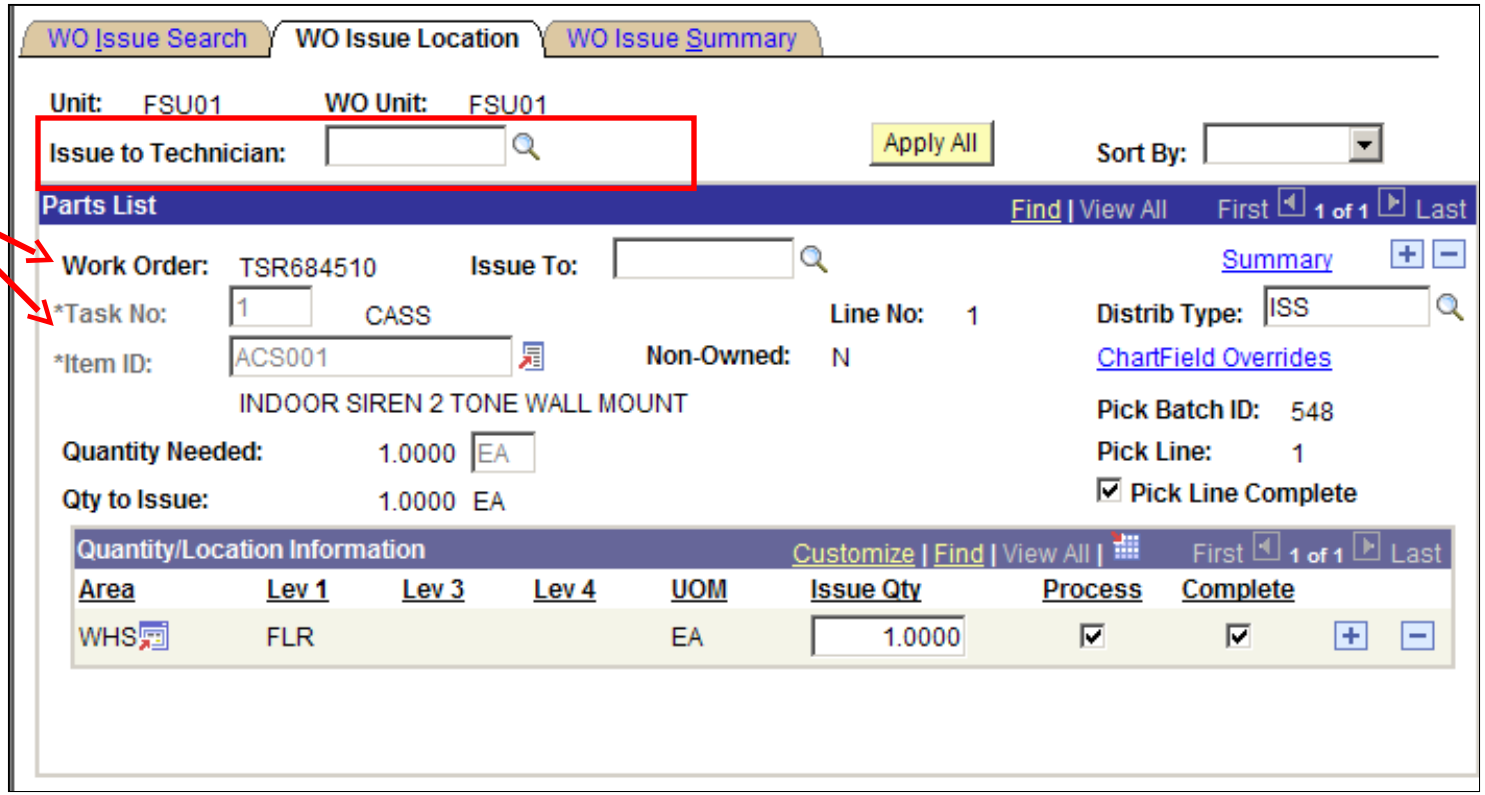


Maint. Mgmt. Integration with Inventory

Issue to Work Orders from Inventory

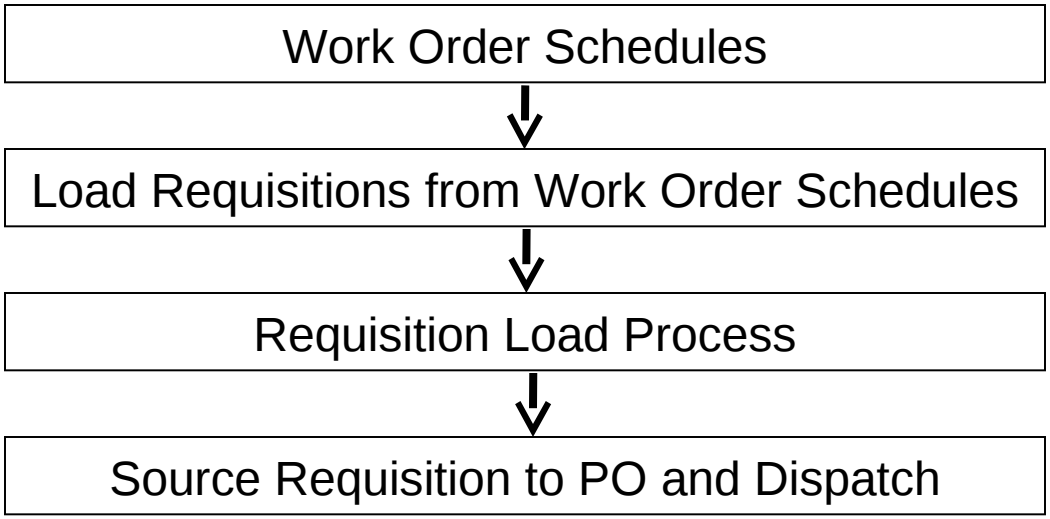
Inventory > Fulfill Work Orders > Issue to Work Orders > WO Issue Location (tab)

Work Order Reference



Maint. Mgmt. Integration with Purchasing

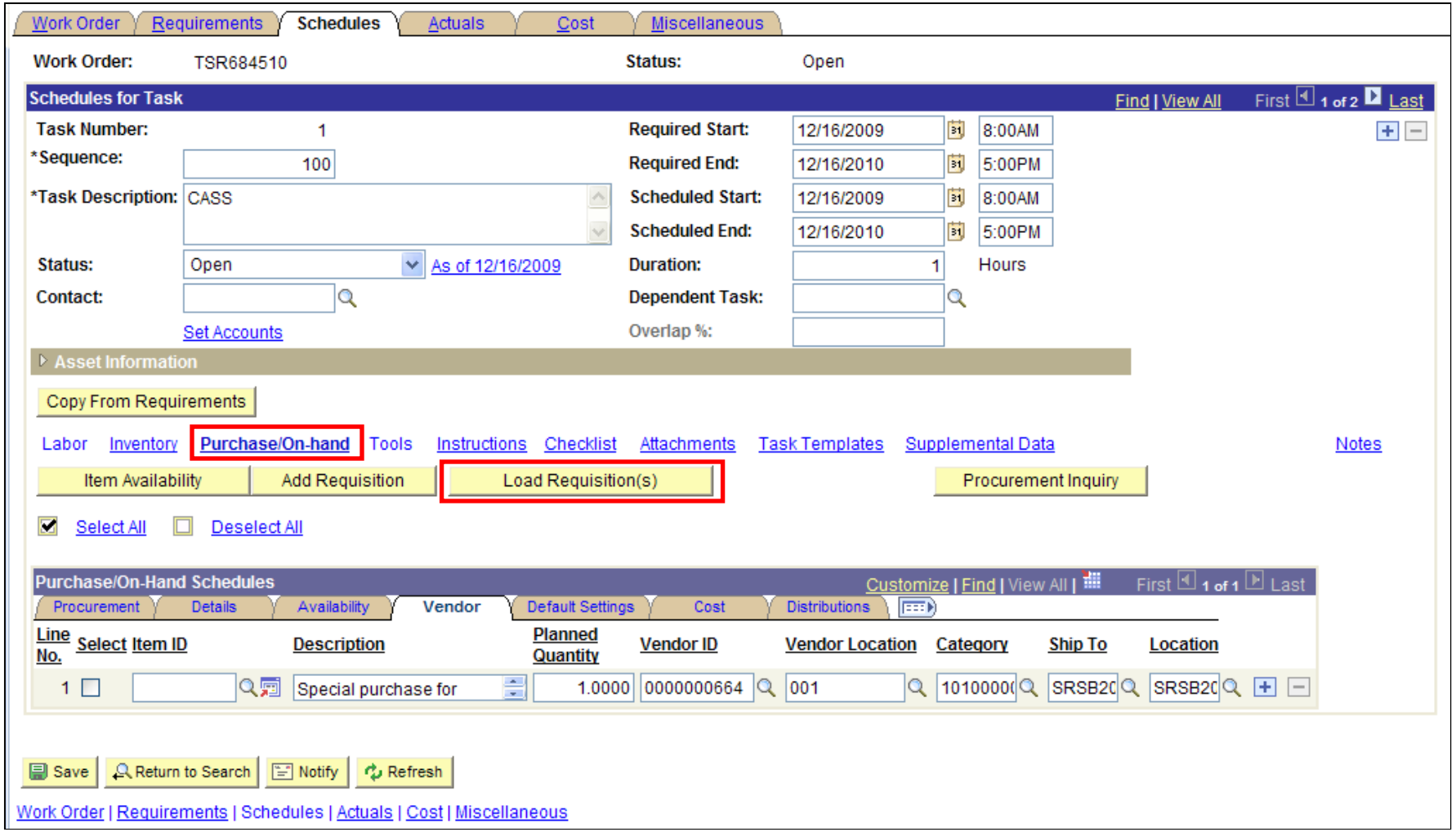
Process Flow



Maint. Mgmt. Integration with Purchasing

Work Order Schedules

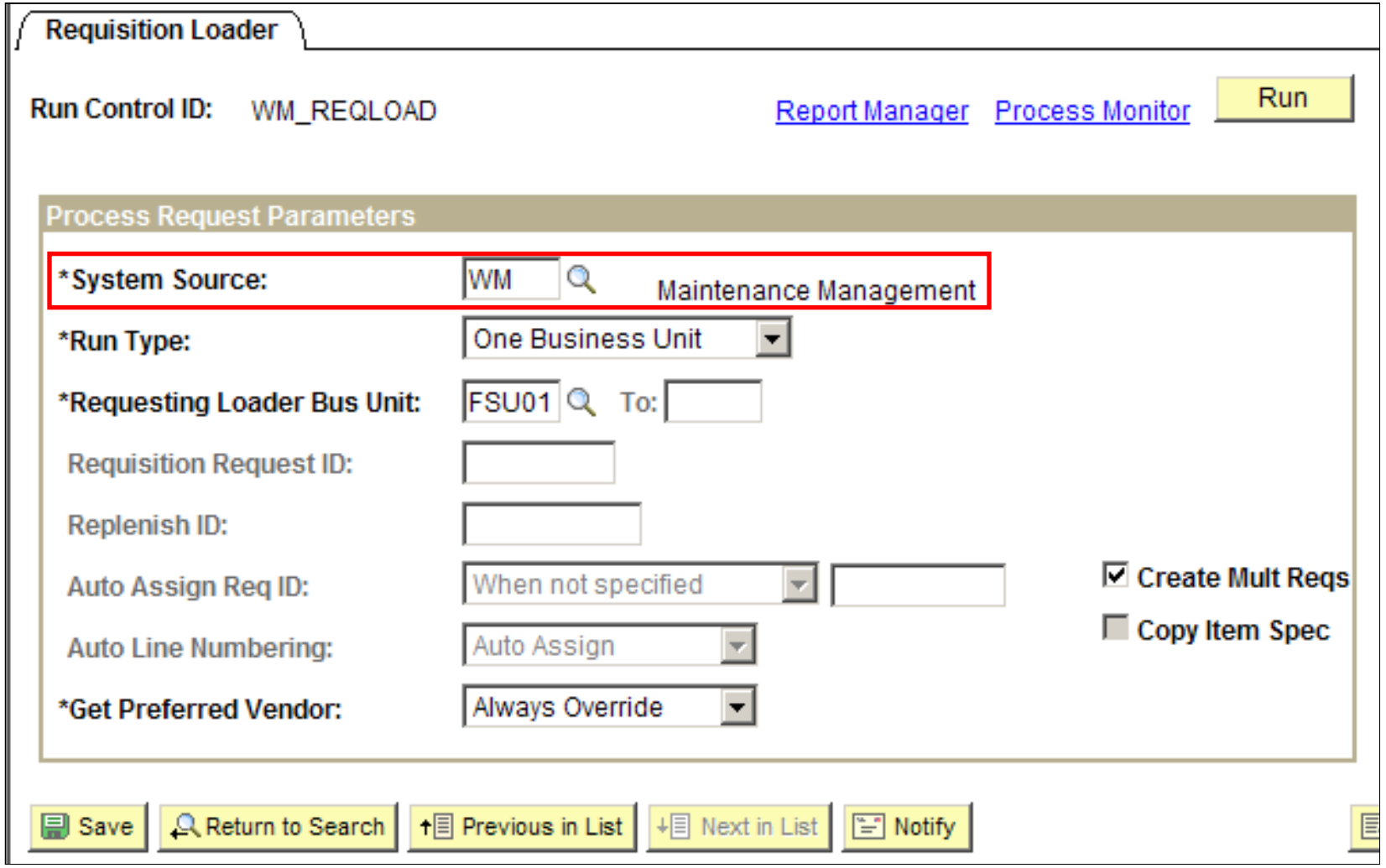
Maintenance Management > Work Orders > Schedules (tab)



Maint. Mgmt. Integration with Purchasing

Requisitions Load Process

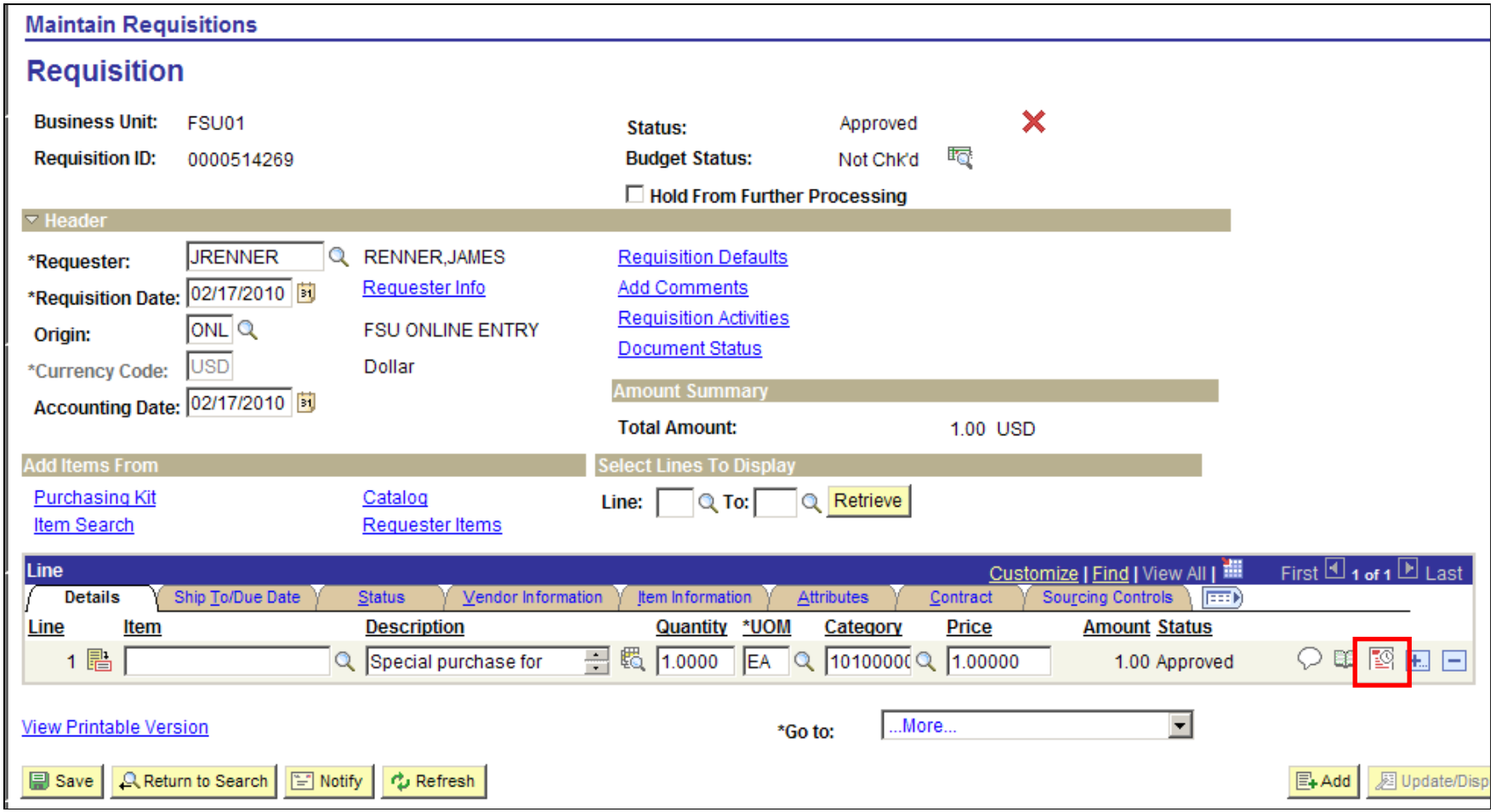
Purchasing > Requisitions > Load Requisitions



Maint. Mgmt. Integration with Purchasing

Requisition Created from a Work Order

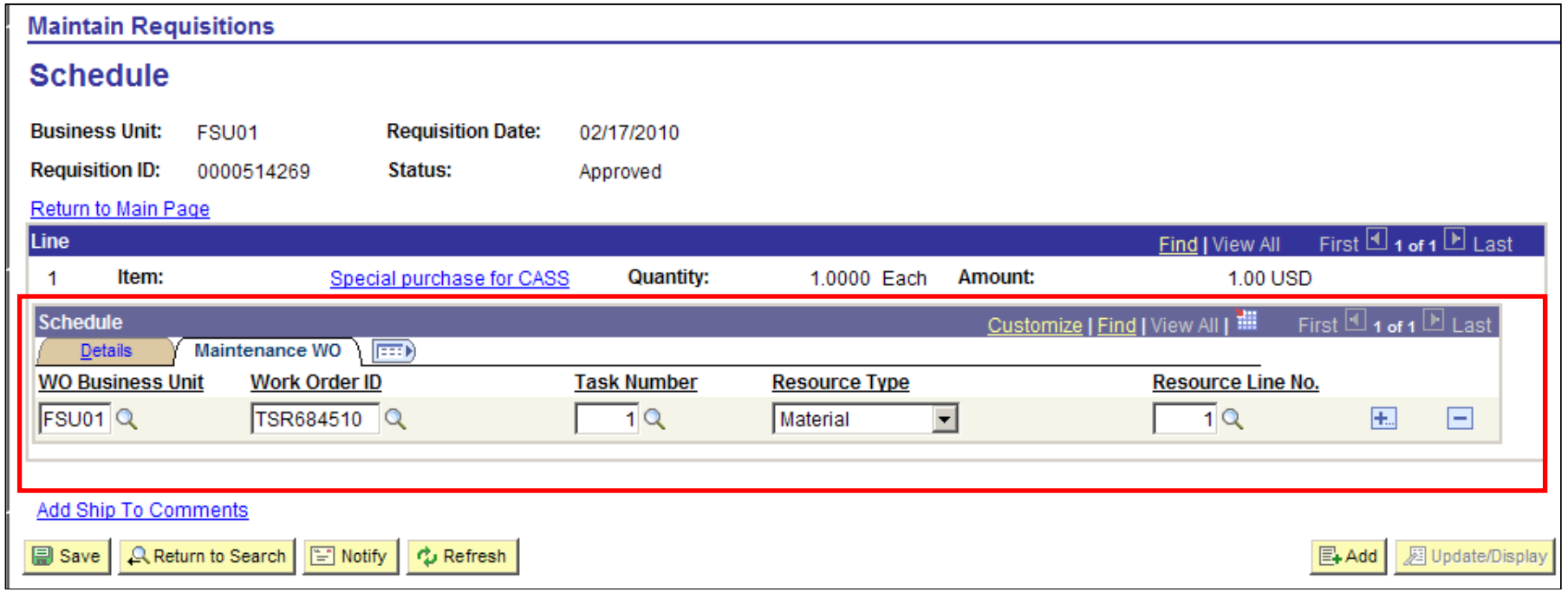
Purchasing > Requisitions > Maintain Requisitions



Maint. Mgmt. Integration with Purchasing

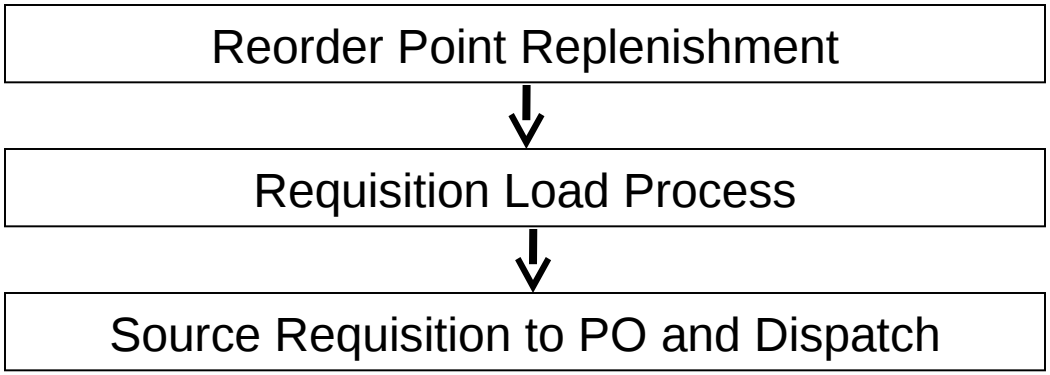
Requisition Created from a Work Order

Purchasing > Requisitions > Maintain Requisitions > Schedules (link)



Inventory Integration with Purchasing

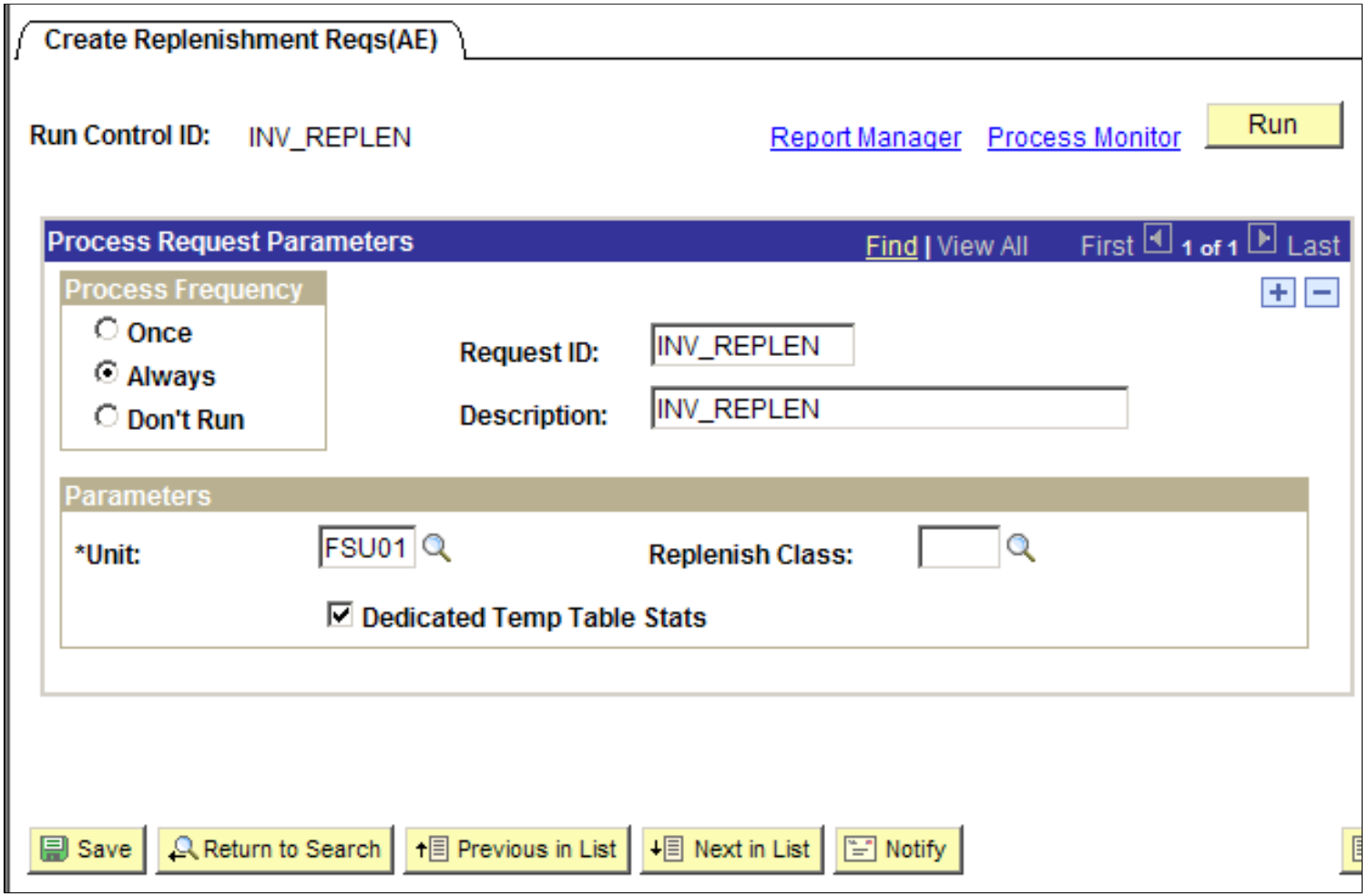
Process Flow



Inventory Integration with Purchasing

Reorder Point Replenishment

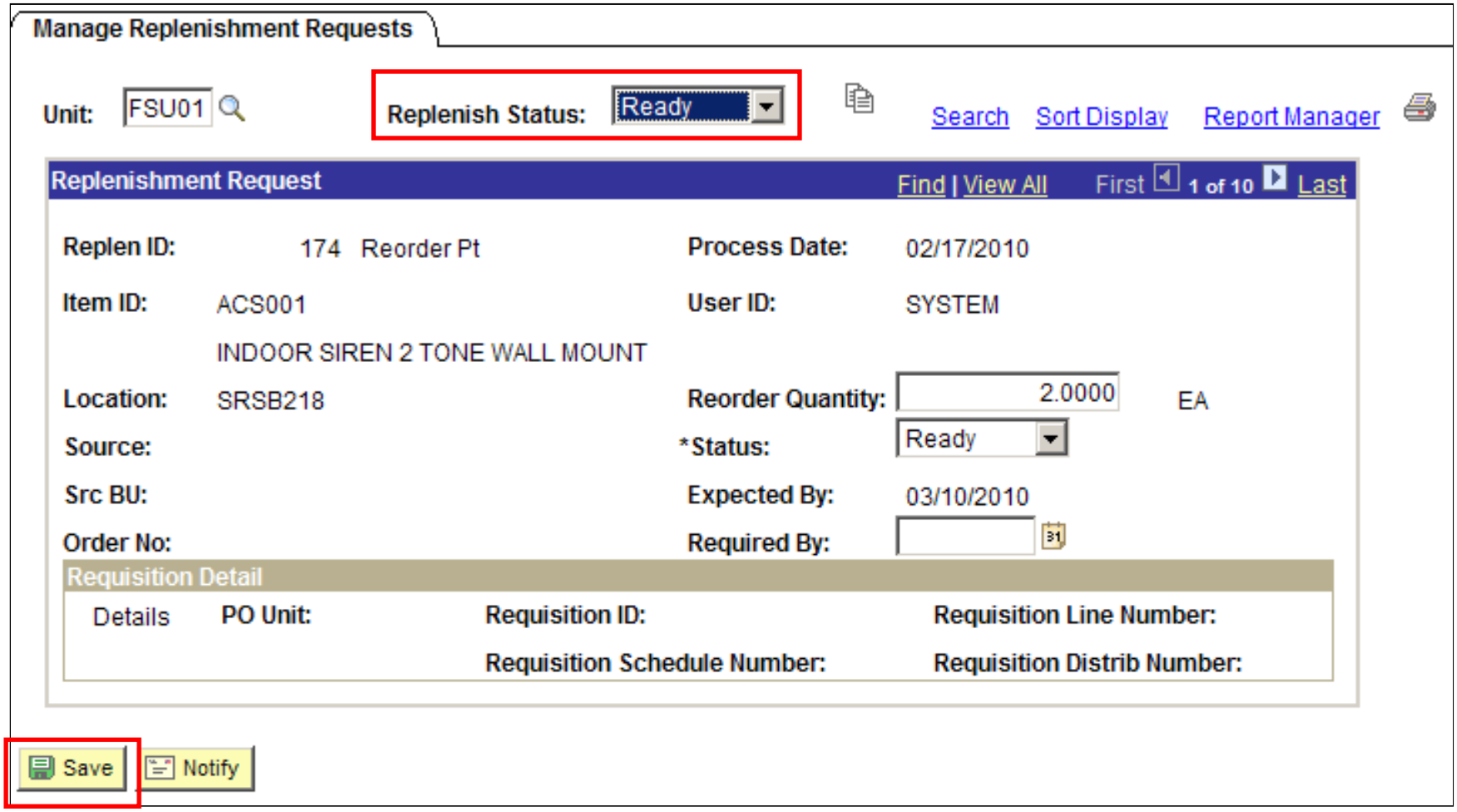
Inventory > Replenish Inventory > Create Replenishment Requests



Inventory Integration with Purchasing

Reorder Point Replenishment

Inventory > Replenish Inventory > Manage Replenishment Requests



Inventory Integration with Purchasing

Requisition Load Process

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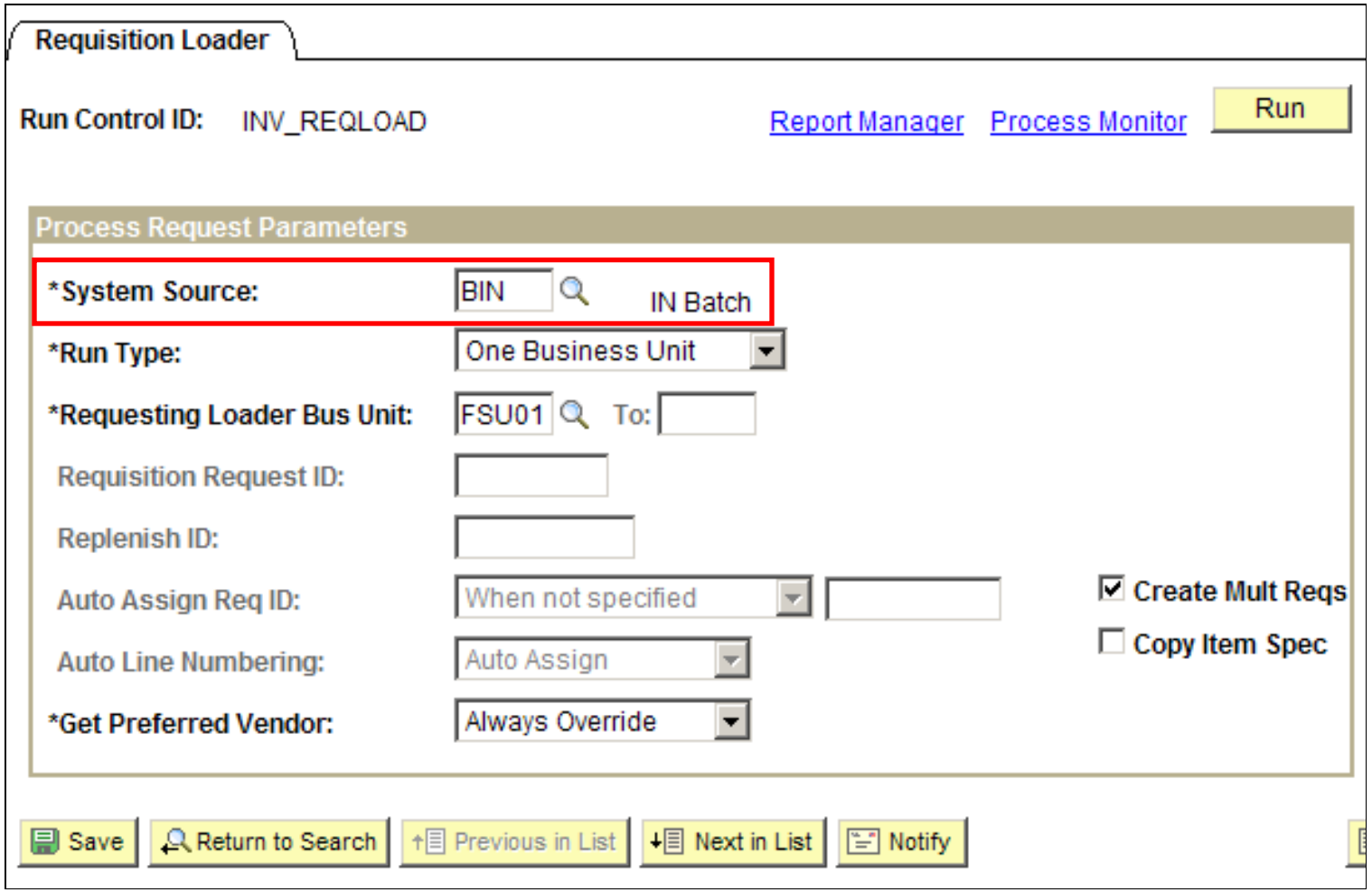

Inventory Integration with Purchasing

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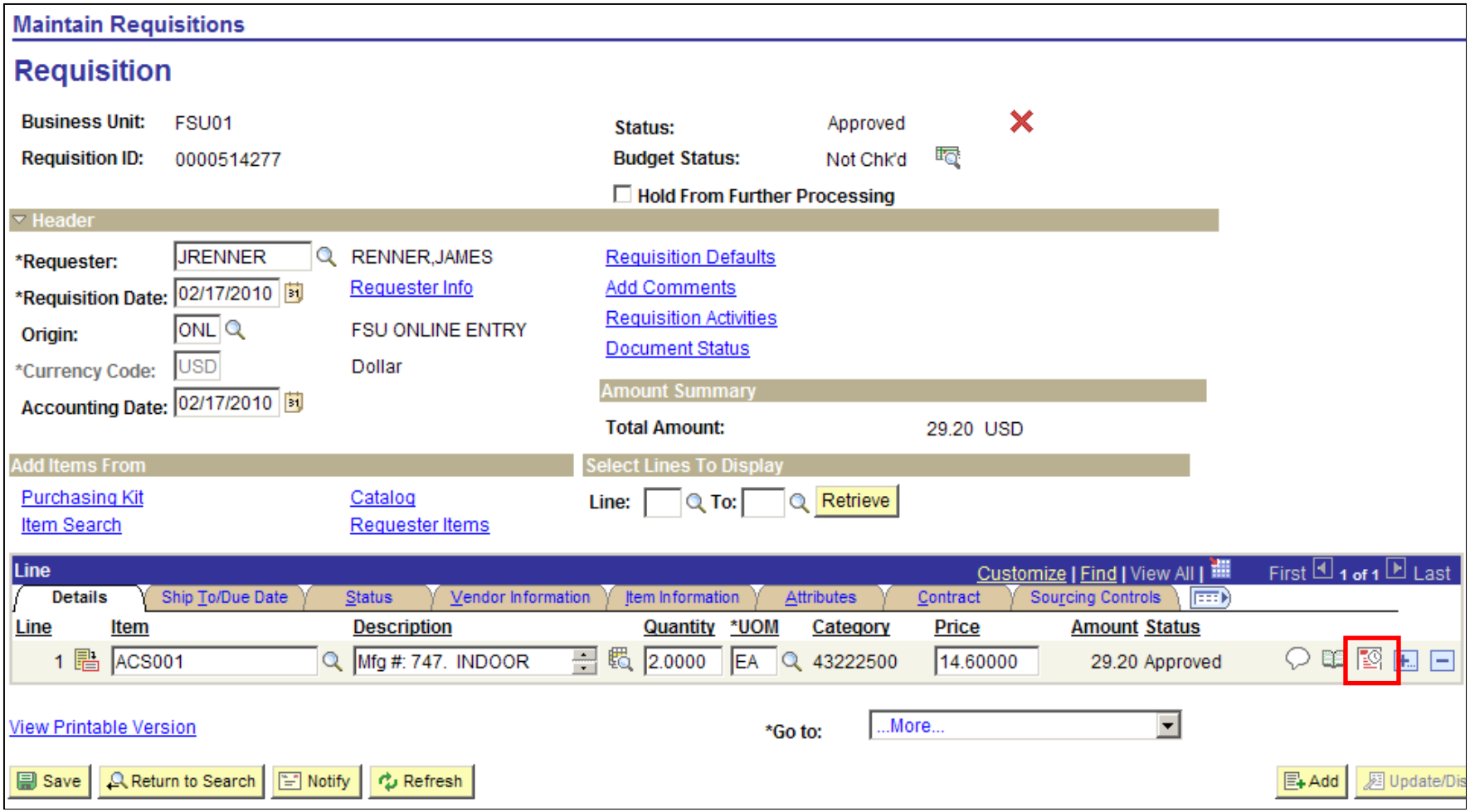
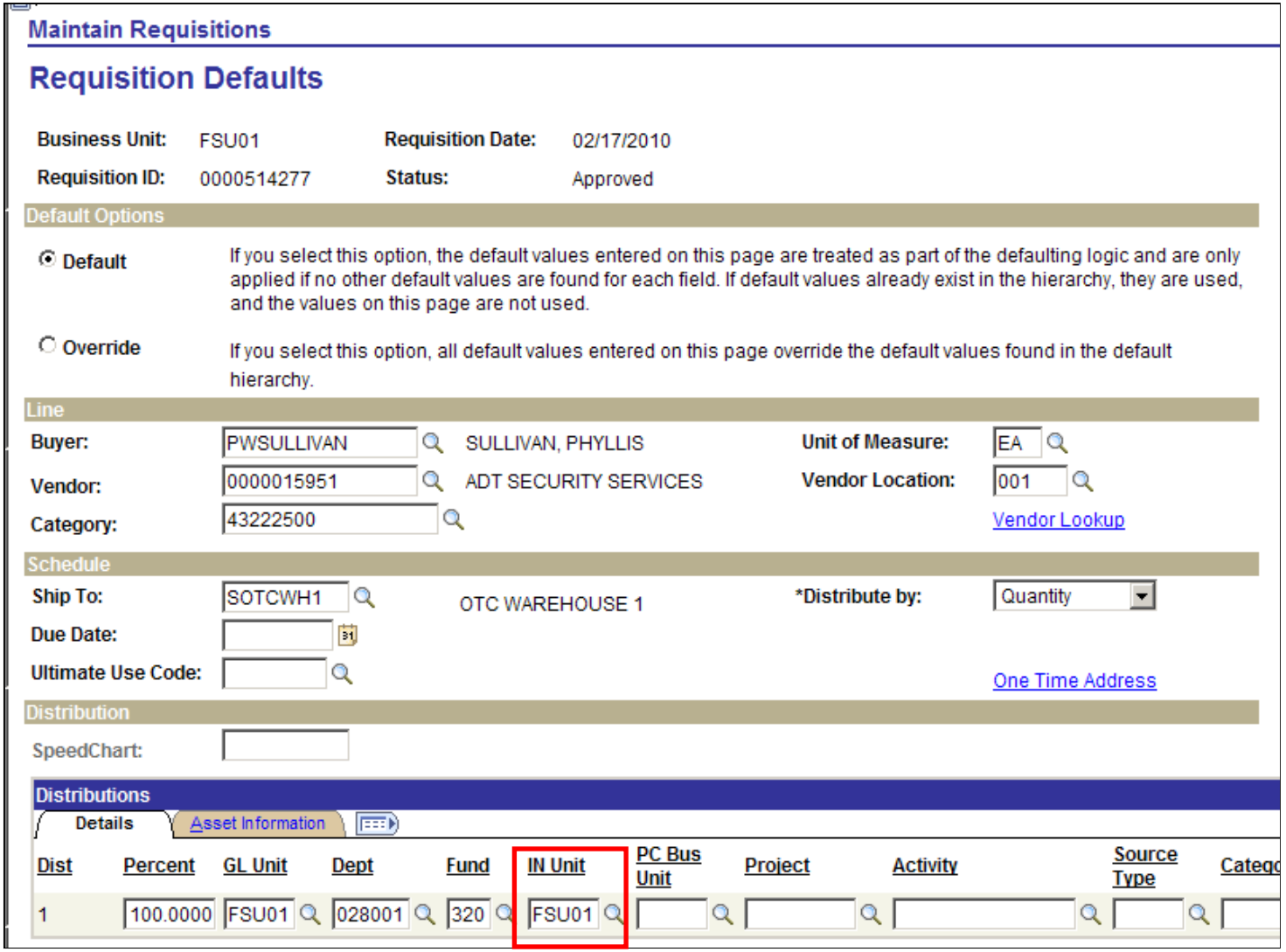


Inventory Integration with Purchasing

Requisition Created from a Work Order

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



Project Outcomes

Before

- FMP Work Order System
- FMP Inventory & Purchasing System
- PS ePro/Purchasing & Receiving
- FMP Inventory & Purchasing System
- FMP Work Order System
- MySoft Billing

After

- FMP Work Order System
- PS Maintenance Management
- PS Inventory
- PS Purchasing & Receiving
- PS Inventory
- FMP Work Order System
- MySoft Billing

Questions?

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