IM-001

Create Item

- IM-E001 Recognized Need
  - Search Site Storeroom
    - Is Item in Site Storeroom?
      - Yes
        - Abort and Utilize Existing Item Number
      - No
        - Search Item Master
          - Is Item in Item Master?
            - Yes
              - Add Item to Storeroom IM-002
            - No
              - Research / Collect Information on Item
          - No
            - Add Item to Storeroom IM-002
Add Item To Storeroom

- IM-E002: Add Item to Storeroom
  - Identify Item to be Added to Storeroom
  - Add Item to Storeroom Action
  - Select Site Storeroom
  - Populate Appropriate Fields

- Main Storage Location (bin)
- Unit Cost
- Current Bin Balance
- Lot Identification
- Average Cost

- Does Item Need Added to Another Storeroom?
  - Yes
  - Set Reorder Details IM-003
  - No
  - IM-003
**IM-003**

Set Reorder Details

[Diagram showing the process of setting reorder details with steps labeled: Identify Item, Select Storeroom, Add Key Values, Select Primary/Alternate Vendors, Replenish Items IM-004, and Material Transactions IM-005]

- Min/Max Reorder Point
- Lead Time (days)
- Economic Order Quantity
- Unit of Receipt
- Unit of Issue
- Unit Conversion Factor
- Standard General Ledger
- Normal Stock Level

Vendor (source number)
Manufacturer
Manufacturer Part #
Vendor Stock #

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IM-004  
**Replenish Items**

1. Run Maximo Re-Order Preview Action for Each Storeroom
2. Preview Re-Order, adjust as needed. Run Re-Order
3. Generate Purchase Orders
4. Send Purchase Orders to Vendor(s)
5. Receive Items On Dock Into Maximo
6. Group Items By Primary Vendor on Aggregate PR's

- Is Item Rotating?
  - Yes: Assign Equipment # To Each Item
  - No: Direct Issue?
    - Yes: Issue To Work Order
    - No: Update Storeroom Balance

Material Transactions (IM-005)

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**IM-005**

**MATERIAL TRANSACTIONS**

1. **Select Storeroom**
2. **Select Transaction Type**
   - **Transfer**
   - **Return**
   - **Issue**

   - **Were Items Reserved?**
     - **Yes**
       - **Select From Reservations**
       - **Verify or Enter Quantity**
     - **No**
       - **Select Item Number**

   - **Verify or Enter Quantity**

3. **Select Item**
4. **Enter Quantity**
5. **Select Receiving Storeroom**
6. **Record Quantity Returned**
7. **Update Storeroom Balances**
8. **Inventory Adjustments (IM-006)**
IM-006
INVENTORY ADJUSTMENTS

1. Select Storeroom
2. Select Item
3. Select Adjustment Type
4. Adjust Current Balance
   - Enter New Current Balance
5. Adjust Physical Count
   - Enter Physical Count
6. Adjust Standard Cost
   - Enter New Standard Cost
7. Adjust Average Cost
   - Enter New Average Cost
8. Reconcile Balances
9. End of Process

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