Post Date: 7/28/16

Los Angeles Unified School District

Maximo 7.5 / Procurement

Storeroom Inventory – How to Delete an Item

DEFINITION

The **Storeroom Inventory – How to Delete an Item Guide** details step by step instructions on how to remove an item from your Storeroom Inventory in Maximo. It may be necessary to remove an item from your Storeroom if, 1. The item has a history of zero transactions or no purchasing activity for a period of time. 2. The item is no longer needed, has been discontinued or is being sent to salvage. 3. The item is a duplicate.

PREREQUISITE

An item to be deleted from a Storeroom Inventory must meet the following requirements:

1. The item must have zero physical and current balance and be reconciled.
2. There cannot be any outstanding reservations against the item in the Storeroom.

OVERVIEW

The Maximo team is responsible for deleting items from Stores Inventory. The Head Stock Clerk will perform the following tasks to prepare an item to be submitted to the Maximo team for deletion.

1. Deplete the physical stock in the warehouse to zero.
2. In the inventory record in Maximo, change the physical count to zero, change the Default Bin to DNR (Do Not Reorder) and reconcile the item.
3. Run the Planned and Reserved Items report. Make sure that there are no outstanding planned or outstanding reserves against the item. If there is, contact the appropriate requestor to "un-plan/un-reserved" the item.
4. Head Stock Clerk shall submit the item(s) that have no plan or reservation, physical count at zero and have a Default Bin of DNR to the Maximo Team to be removed from their storeroom.

LOGIN

The Head Stock Clerk or Designee performs this function.

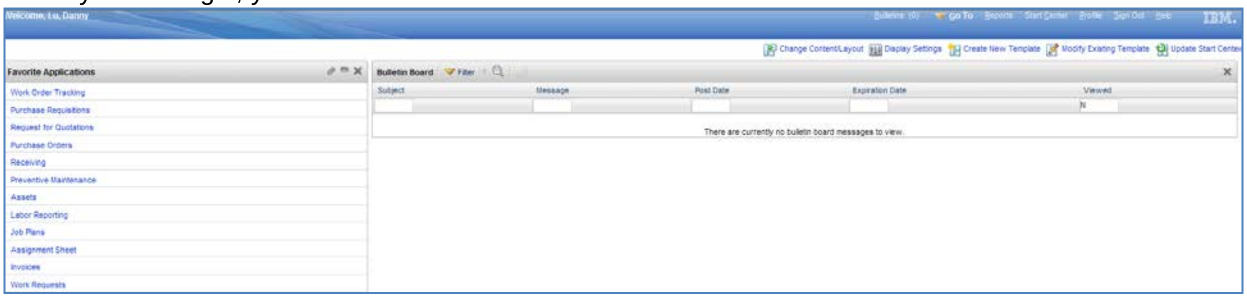
To login to Maximo 7.5, please go to http://awms.lausd.net/maximo.

Enter your **Single sign-on** username and password and click on the **Sign In** button.

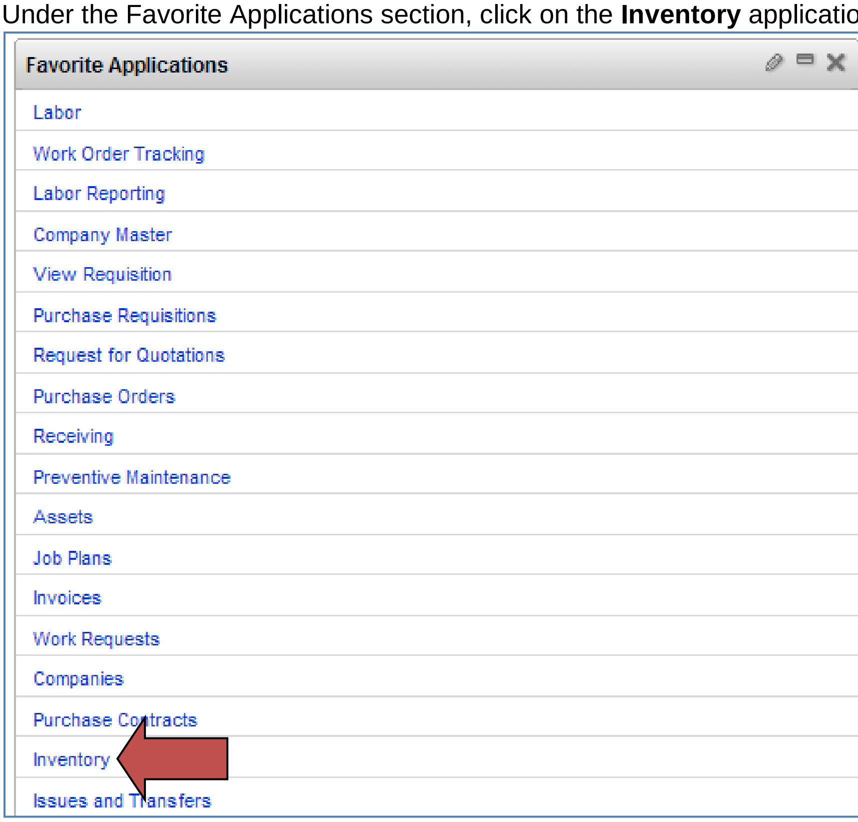
1. CHANGE THE PHYSICAL INVENTORY STOCK TO ZERO

START CENTER

When you first login, you will be taken to the Maximo Start Center.

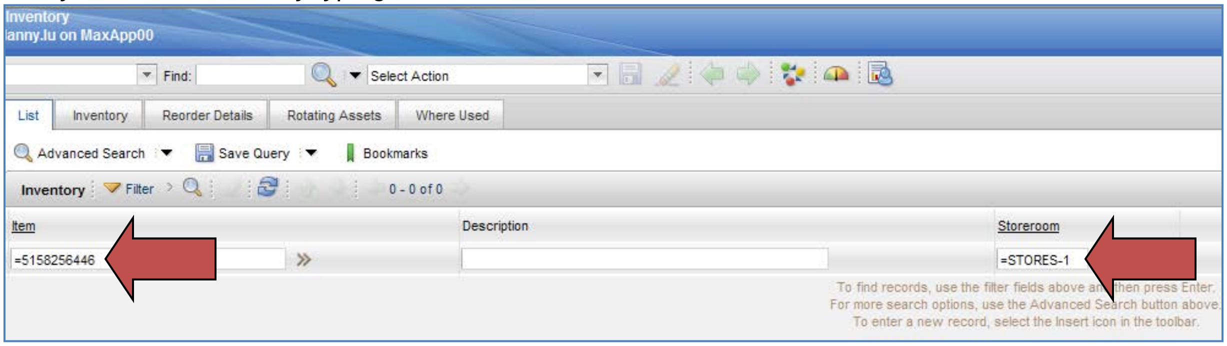


Under the Favorite Applications section, click on the **Inventory** application.

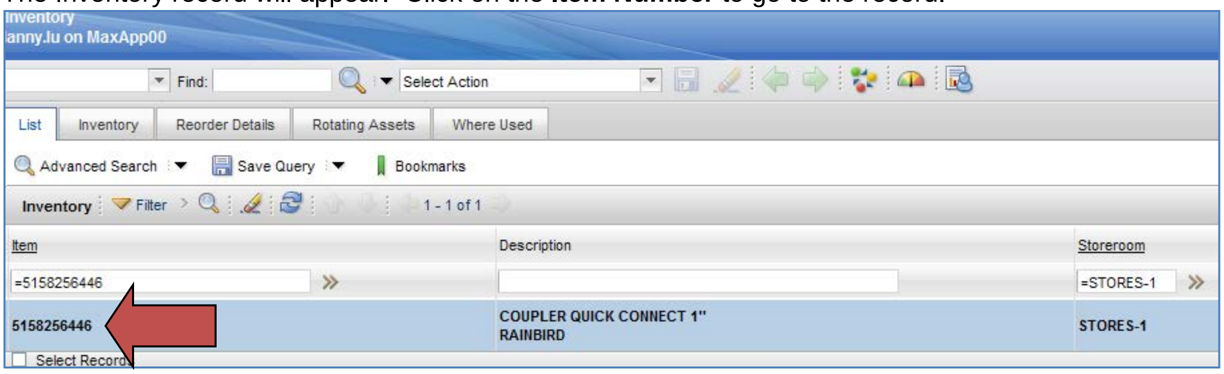


INVENTORY HOME

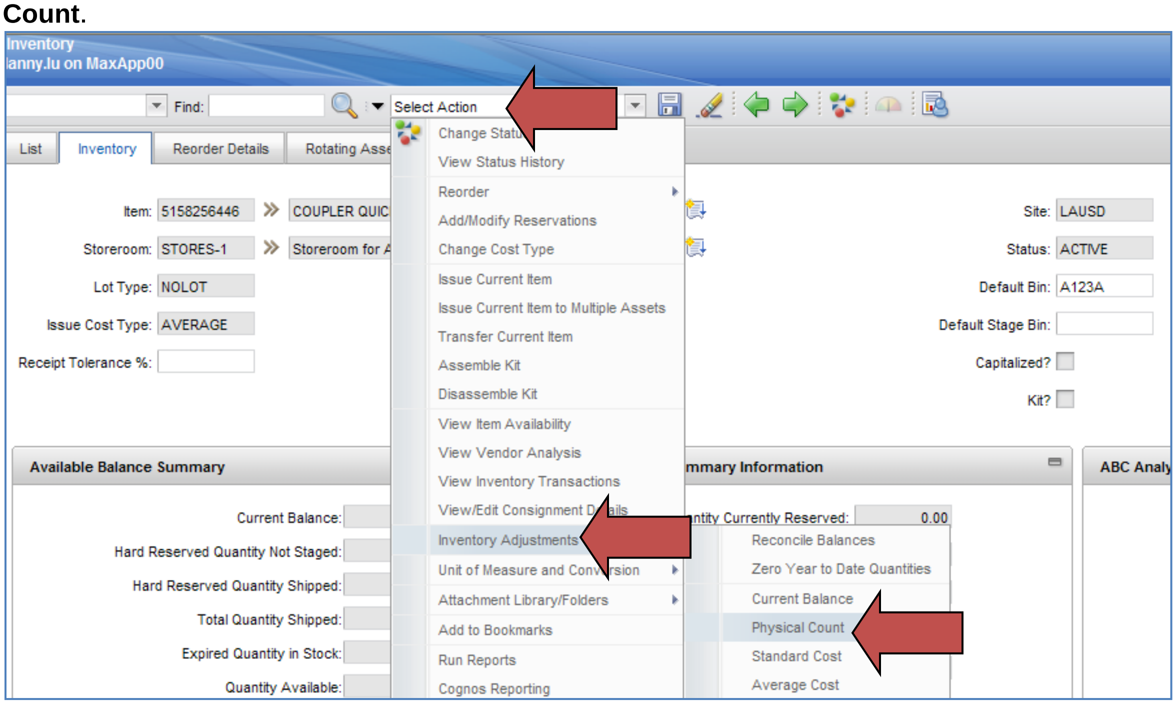
You will then be taken to the Inventory home screen; in this screen, you will search for the inventory item you wish to delete by typing the **Item number** and the **Storeroom** name and hit enter.



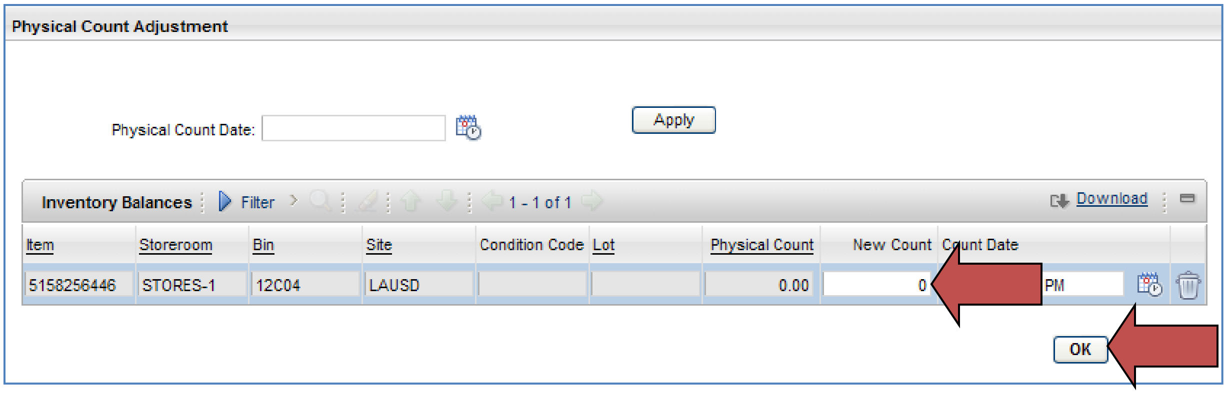
The Inventory record will appear. Click on the **Item Number** to go to the record.



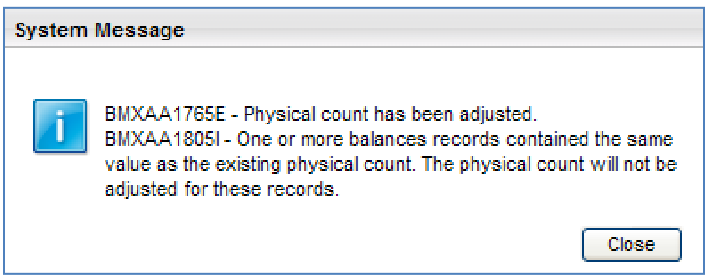
On the Inventory record, click on the **Select Action** dropdown **→ Inventory Adjustments → Physical Count**.



A **Physical Count Adjustment** window will appear. Change the **New Count** to **0** and click on the **OK** button.

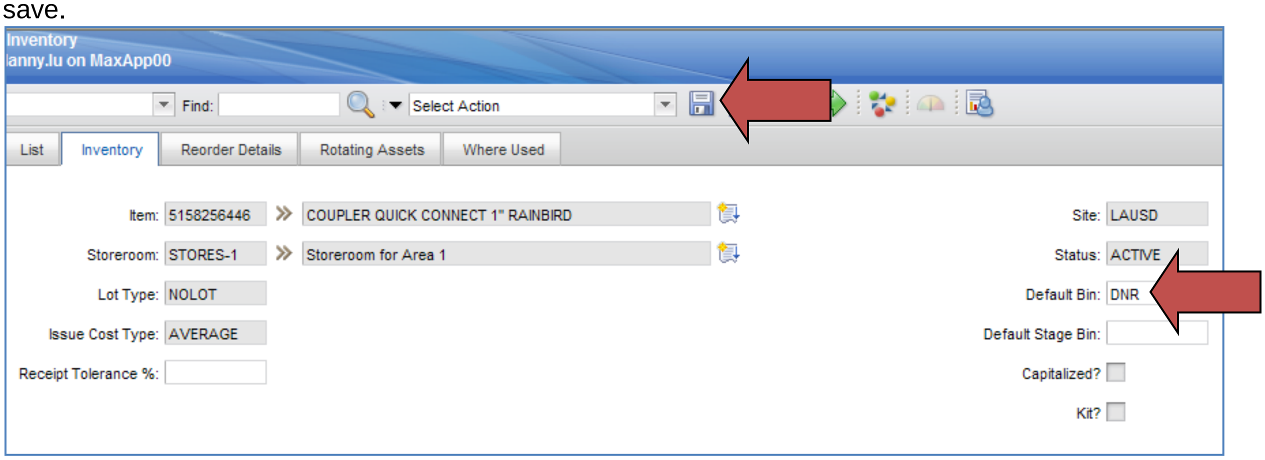


A **System Message** will appear indicating that the Physical count has been adjusted. Click on the Close button.



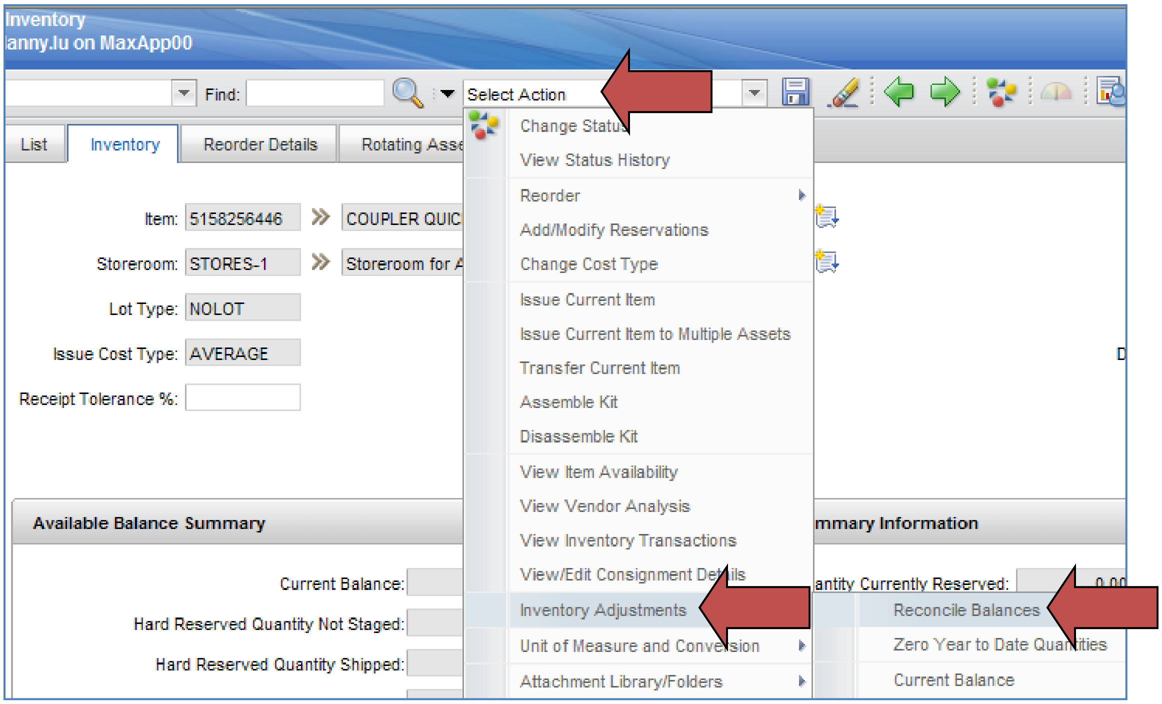
2. CHANGE DEFAULT BIN VALUE TO DNR

On the Inventory tab, change the value of the Default Bin to **DNR**, click on the floppy disk  icon to save.

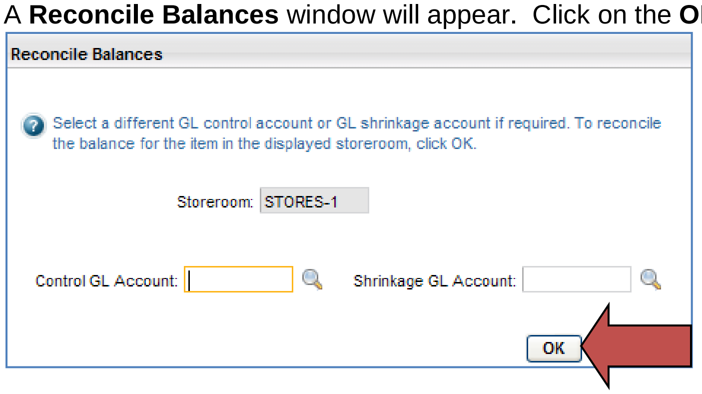


3. RECONCILE BALANCE

On the Inventory record, click on the **Select Action** dropdown and select **Inventory Adjustments → Reconcile Balances**.



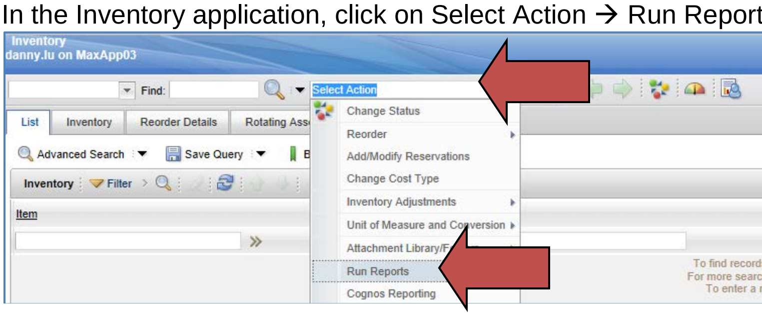
A **Reconcile Balances** window will appear. Click on the **OK** button.



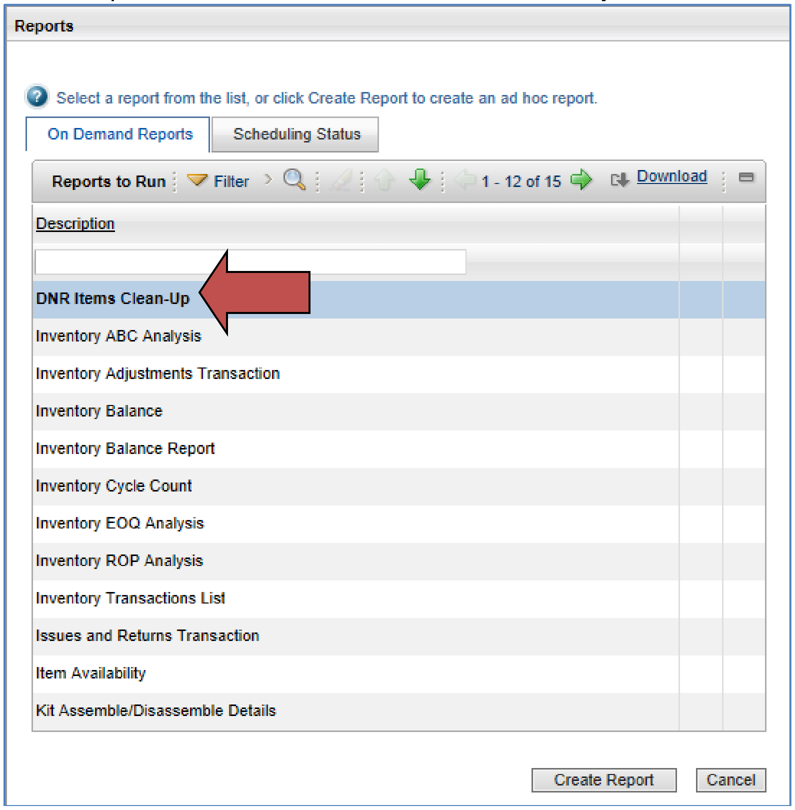
Repeat steps for each item you wish to delete from your Storeroom.

4. RUN THE DNR ITEMS CLEAN-UP REPORT

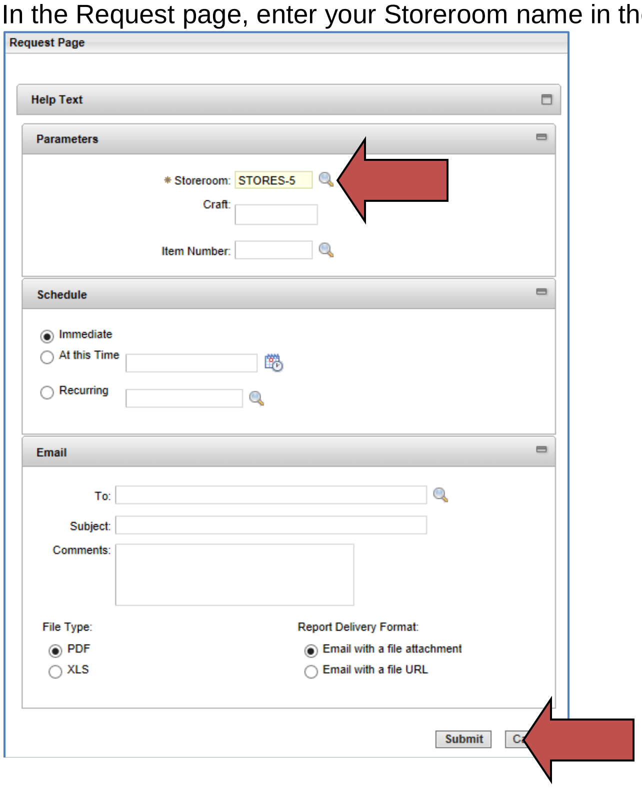
In the Inventory application, click on Select Action → Run Reports.



In the Reports window, select **DNR Items Clean-Up**



In the Request page, enter your Storeroom name in the Storeroom field and click Submit.



The report will show you all items that you have marked DNR where there is still an outstanding Reservation, Job Plan, Purchase Requisition, Purchase Order, or Desktop Requisition. These items needs to be cleared out from the outstanding reservation(s) before they can be removed from your storeroom.

Los Angeles Unified School District — *Existing Facilities Maintenance & Operations*

DNR Items Clean-Up

Storeroom: STORES-5 **Item Number:** **Requested by Craft:**

Items Reserved for Work Orders (sorted by craft code, work order status, and W.O.#)

Craft Code	Item #	Item Description	W.O. #	W.O. Status	Desktop Req #	P.O. #	Reserved Qty

Items in Job Plans for all crafts (sorted by craft code)

Craft Code	Item #	Item Description	Job Plan #	J.P. Task #	J.P. Item Qty

Items in open Purchase Requisitions (sorted by craft code, work order status, and W.O.#)

Craft Code	Item #	Line Item Description	W.O. #	W.O. Status	PR #	PR Description	PR Line #	PR Status	P.O. #	Order Qty	Issue Date
	6302550312	SEALANT, COST, SIKAFLEX 10			86956	SEALANT, COST, SIKAFLEX 10	3	WAPPR		1.00	6/3/09

Items in open Purchase Orders (sorted by craft code, work order status, and W.O.#)

Craft Code	Item #	Line Item Description	W.O. #	W.O. Status	PO #	PO Description	PO Line #	PO Status	Order Qty	Start Date

Items in open Desktop Requisitions (sorted by craft code, work order status, and W.O.#)

Craft Code	Item #	Line Item Description	W.O. #	W.O. Status	DR #	PR Description	DR Line #	DR Status	Order Qty	Enter Date
AR	6302550312	AA 5297860 HUMPHRIES	5297860	CLOSE	226753	AA 5297860 HUMPHRIES	2	APPR	10.00	4/27/09

Planned items for Active Work Orders (HistoryFlag = "N") (sorted by craft code, work order status, and W.O.#)

Craft Code	Item #	Item Description	W.O. #	Planned Qty
W.O. Status:	**COMP**			
HG	6302550312	SEALANT, CONSTRUCTION GRADE, SIKAFLEX 1A 10.1 OZ	7311257	2.00

DNR items with no pending reservations, planned lines against "active" W.O.s, PRs, POs, or Desktop Reqs against selected storeroom (note these items may have pending transactions against other storerooms) lastissuedate

Item #	Item Description	Current Balance	Reconciled (Y/N)	Last Issue Date

5. SUBMIT REQUEST TO MAXIMO TEAM TO DELETE ITEMS FROM STOREROOM

Email list of DNR items with no pending planned or reserves to the Maximo team to delete from Stores inventory. Maximo team to inform Head Stock Clerk when items have been deleted.

Should you have any questions on this guide, please contact Danny Lu (danny.lu@lausd.net / 213-241-1121), Mark Merrick (mark.merrick@lausd.net / 213-241-8620), John Herweg (john.herweg@lausd.net / 213-241-1127 or Rick Peterson (richard.peterson@lausd.net / 213-241-6274).