



Inventory Management Plan

The Inventory Management Plan allows you to change the type, start, duration and frequency of your inventories.

1. Navigate to the **Inventory > Inv Mgt Plan** menu.
2. Select your plan level. The level(s) available are determined by your Site Access level.
3. Select the type of plan, General or Sensitive.
4. Select the **Search** button.
5. On the **Search Results** page, select the *Update* hyperlink for the plan to revise.
6. Review the following fields on the **Plan Data** page:

Search Criteria	
Level	Agency <input type="button" value="v"/>
Type	General <input type="button" value="v"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>	

Note: The ability to change the options listed below may depend on options being Deferred to a Lower Level. The options can be deferred down to the Actbl UIC or UIC level.

- **Include Sub Cust** - This option determines if you would like to include Sub Custodians when generating the inventory. The *Do Not Include Sub Custodian Number* option produces individual inventories: One for the Custodian and separate inventories for each of the Sub Custodians. This can be deferred to a lower level.
- **Inv Type** - Select the type of inventory to generate or defer to a lower plan level.
- **Include Non-Actbl** - Select the checkbox to include assets marked as non-actbl.
- **Start Dt** - Enter the effective date of the plan.
- **Inv by Maint** - If *I-Inv by Maint* is selected, the Last Inv Dt is updated when the Maintenance and Utilization (M&U) Work Order - Receipt Dt and Return Dt are entered. This can be deferred to a lower level.
- **Mnth in Plan** - Enter the number of months to inventory all assets covered in plan.
- **Invs in Period** - Enter the number of inventories to be conducted throughout the months in the Inventory Plan. Enter "0" (zero) to defer to a lower level. This is only applicable for Cyclic Inventories.

7. Select the **Update** button to record changes.

Plan Data			
Level	AGENCY	Type	GEN
Include Sub Cust	Include Sub Custodian Nu <input type="button" value="v"/>	*Inv Type	Custodian <input type="button" value="v"/>
Include Non-Actbl	<input checked="" type="checkbox"/>	*Start Dt	11/1/2011 <input type="button" value="v"/>
Inv by Maint	I-Inv by Maint <input type="button" value="v"/>	*Mnth in Plan	36
Invs in Period	0		

