

Managing Inventory

Reordering Inventory Items

Once an inventory has been created in Maximo, inventory items will need to be replenished as they are used and the stock is depleted. A manual reorder can be performed at any time, regardless of Current Balance and Reorder Point field information. A manual reorder is performed from the Inventory application by locating the inventory record to be ordered and using the Select Action menu to choose Reorder > Reorder Items.

Procedure – Creating a Manual Reorder

- A. Log into the Maximo Home page, Start Center.
- B. **Navigate** to the Inventory application.
 1. At the top of the screen, click **Go To**.
 2. Click **Inventory > Inventory**.
 3. Click the **Reload** icon.
- C. Create a manual order.
 1. Click the dropdown for the **Select Action** menu.
 2. Select **Reorder > Reorder** Items.
 3. At a minimum, in the Reorder Items dialog box, enter the following:
 - Ignore Reorder Point? – select this option
 - Run in Background Mode – unselect this option
- D. Preview the manual order and update the quantity.
 1. Click the **Preview** button.
 2. In the **Reorder Item Detail** dialog box, in the **Reorder Quantity** field, change the number.
 3. In the **Reorder Items Detail** tab, click **Run Reorder**.
 4. Purchase order(s) is/are generated,
 5. Click **OK**
- E. Verify the Purchase Order was generated in the Purchase Orders application.
 1. At the top of the screen, click **Go To**.
 2. Click **Purchasing > Purchase Orders**.
 3. Click the **Reload** icon.
 4. In the **PO** filter field, locate the PO just created.
Click on the **PO # link** and review your manual reorder.

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F. Approve Purchase Order

1. At the top of the screen, click **Go To**.
2. Click **Purchasing > Purchase Orders**.
3. Click **Reload** icon.
4. Select generated Purchase order(s).
5. Click the dropdown for the **Select Action** menu.
6. Select **Change status**.
7. In the **Change status** dialog box change status to **Approved**.

G. Run Purchase order summary report for entries in ProcureAZ

1. At the top of the screen, click Reports > Purchasing > Purchase orders
2. In the **Reports** dialog box find **Purchase Order Summary Report** and click on the name
3. Select Site
4. Select Status Approved.
5. Select From and To date
6. Submit. A new tab opens with the Report Viewer displayed.
7. Export or print for ProcureAZ use.