A. Running a Reorder

1. Go To – Inventory – Inventory
2. Filter on a Storeroom. To do this, click the “Filter” button so that empty boxes show on the top of each column. Type a storeroom name in the box above the Storeroom column, and click “Enter”

3. Click Select Action – Reorder – Reorder Items. Click OK. Click OK again at the notice about all records.
4. The following screen will appear. The boxes circled in red below should be checked and your email address should be in the “E-mail Address Notification” box.

5. Click “Preview”. This will show a list of the items that need to be reordered.
   a. Important: Delete any items that you are not going to reorder by clicking the trash all the way to the right.
6. Click “Run Reorder”. An Email is sent notifying you of the # of items reordered, the PR #s created, and the PO #s created. (When the POs are created, the PRs become closed).
a. Note: If the “Run in Background Mode” was not checked in the screen above, an email would not have been sent. Instead, a dialog box would appear showing the PR #s created and the PO #s created. Before closing the dialog box, make a note of the PO #s so that you can look them up in Maximo.

B. Ordering the Items that were generated by the Reorder

1. Go To – Purchasing – Purchase Orders
2. On the List tab, click the “Filter” button so that empty boxes show on the top of each column. In the field at the top of the PO column (the first column), type in a PO number that was generated by the Inventory Reorder and then click Enter.
   a. If you do not know the PO number, click “Advanced Search”, and under “Line Details”, type the Storeroom name in the Storeroom field, then click “Find”.
   b. And/or filter by the date the order was generated. On the List tab, Type the date in m/y/yy format in the Description column and click Enter.
3. To open the PO, click on the PO number in the first column.
4. Review the PO information on the “PO” tab. Review the quantity and pricing on the “PO Lines” tab, revise if necessary. Place the order either by Pcard, eShop, or through the UBSC.

5. After placing the order, click the Change Status button and change the PO status to “Approved”.

![PO and PO Lines Screenshots](image-url)
C. Receiving the Items

1. Go To – Purchasing – Receiving
2. On the List tab, type the PO number into the box and then click Enter.
3. Click on the PO number in the first column to open the PO Material Receipts tab.
4. Click the “Select Ordered Items” button on the bottom right.
   a. Place a checkmark in the box next to each line that has been received.
   b. If a partial order was received, revise the quantity received in the Quantity Due column.
   c. Enter remarks in the last column, if necessary.
   d. Click “OK”.
5. Back on the Material Receipts tab, click the Save button at the top of the screen.
6. If the full order was received, the Receipts field on the top right of the screen will change from “NONE” to “COMPLETE”.
7. If a partial order was received, the Receipts field on the top right of the screen will change from “NONE” to “PARTIAL”. (To finish receiving the items, follow steps 4 and 5 until all items have been received.)