

How to Create a Purchase Requisition in IBM Maximo

This guide shows you how to create a purchase requisition in IBM Maximo when a work order requires materials that are not available in stock. You will learn how to check inventory availability from a work order, raise a purchase requisition for missing items, route it through approval, and convert it into a purchase order.

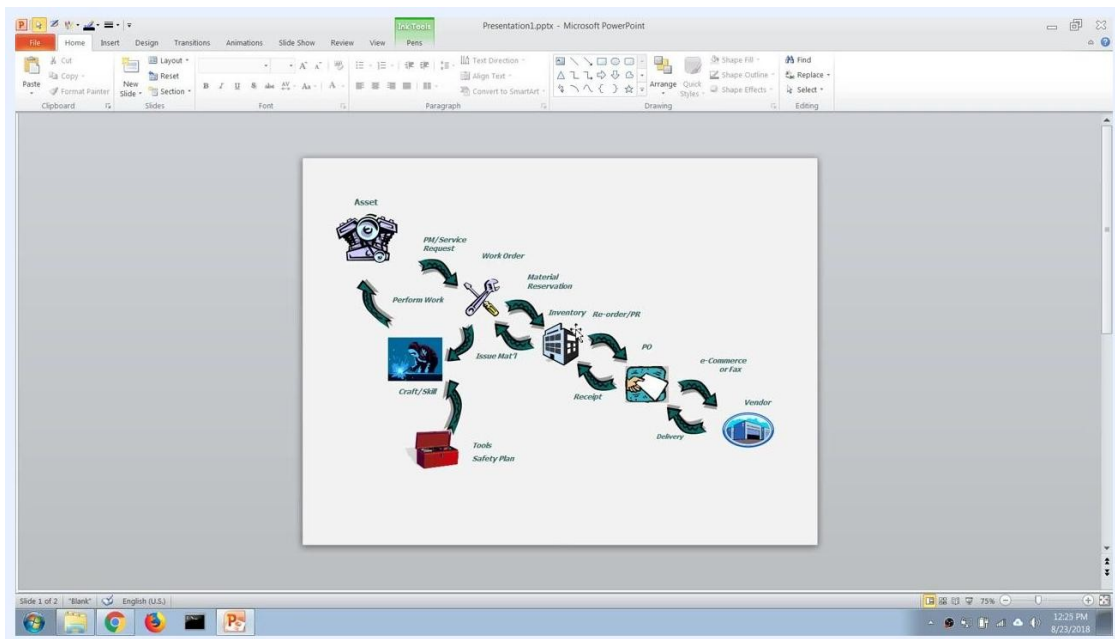
Overview of supply chain management in Maximo

Maximo includes supply chain management processes that support work management by providing the materials and services your teams need.

Three modules work together to deliver this process:

- **Inventory** module
- **Purchasing** module
- **Contract** module

These modules support the standard supply chain management process used across your organization's staff, from identifying a material need on a work order through to receiving and issuing the item.



A PowerPoint slide showing a flowchart of the supply chain management process in Maximo, including steps such as Asset, PM/Service Request, Work Order, Material

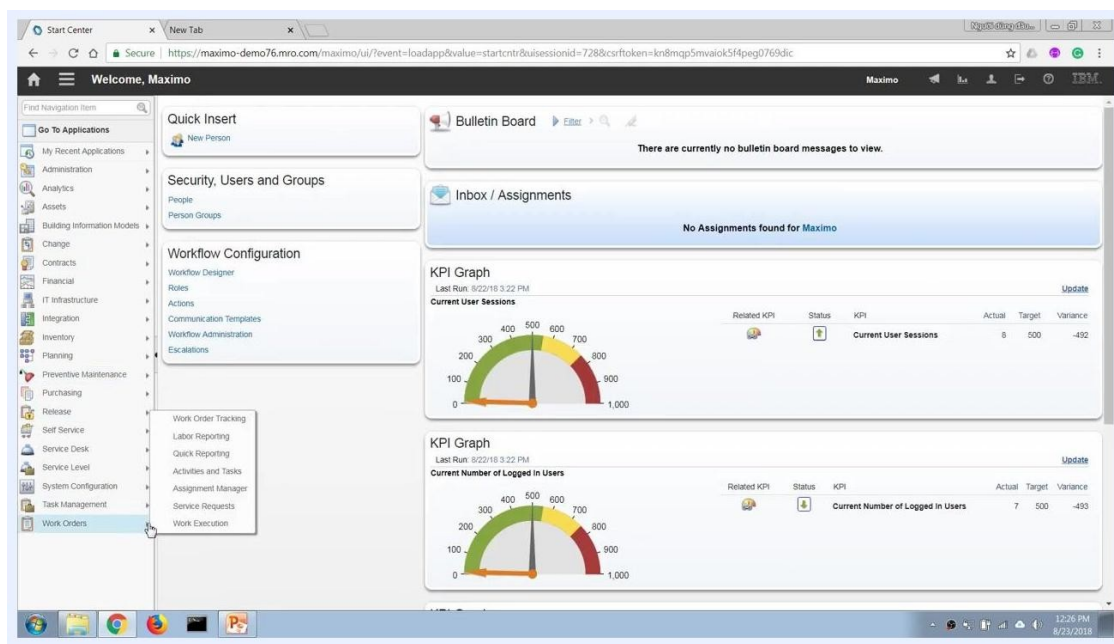
Reservation, Inventory, Re-order/PR, PO, e-Commerce or Fax, Vendor, Delivery, Receipt, Issue Mat'l, Craft/Skill, Tools, Safety Plan, and Perform Work. Each step is illustrated with icons and arrows showing the process flow.

Prerequisites

- A work order already created in Maximo that requires spare parts or materials.
- Access to the **Work Orders**, **Purchasing**, and **Inventory** applications in Maximo.
- Knowledge of the work order number you want to check for material shortages.

Step 1: Open Work Order Tracking

Use the navigation panel on the left to select **Work Orders**, then choose **Work Order Tracking** from the dropdown menu. This takes you to the screen where you can search for and review a specific work order.



The Maximo Start Center dashboard is displayed. The left navigation menu is open, with the cursor hovering over Work Orders and a dropdown showing options like Work Order Tracking, Labor Reporting, and Quick Reporting. The main dashboard shows KPI graphs, workflow configuration, and security/user options.

Step 2: Find the work order

Use the **Find Work Order** search field at the top left of the screen to quickly locate the work order you need. Enter the work order number (for example, 1412) and press Enter.

The screenshot shows the Maximo Work Order Tracking interface. At the top, there's a navigation bar with the 'Find Work Order' search field highlighted. Below this, the 'Work Order' tab is selected, displaying a form for Work Order 1412. The form includes fields for Location (Service Truck), Asset (TV-TRUCK21), and various status and action fields. The left sidebar contains navigation options like 'Go To Applications', 'Available Queries', and 'Common Actions'. The bottom of the screen shows a taskbar with various application icons.

The Maximo Work Order Tracking screen with the Find Work Order search field highlighted, ready for input. No work orders are currently listed in the results.

Step 3: Review the work order details

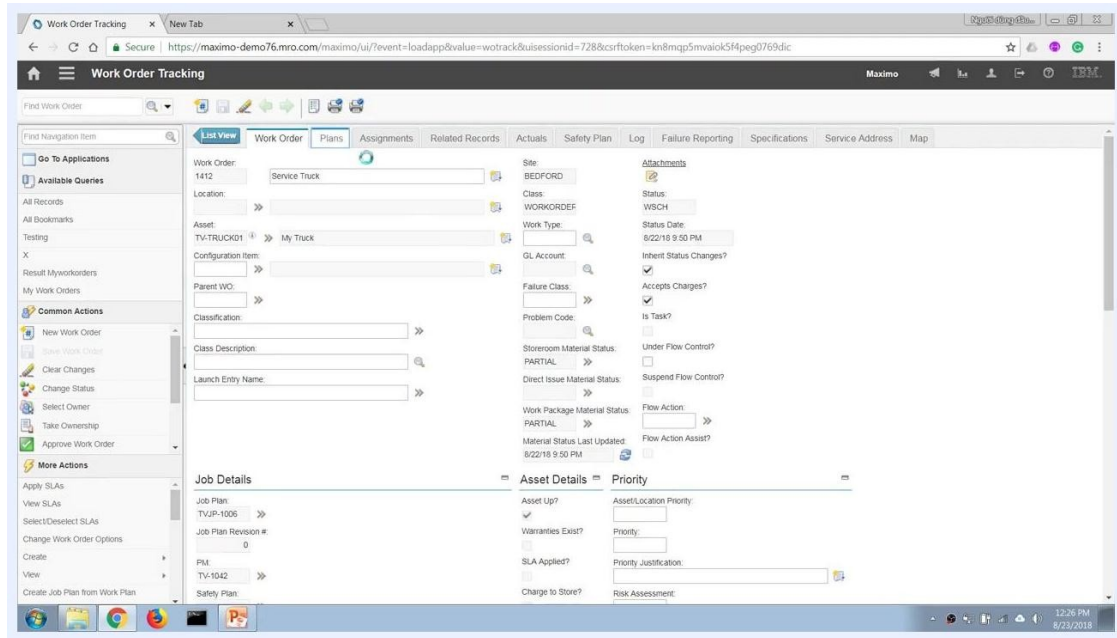
Confirm you are viewing the correct record by checking the work order number, asset, and description (for example, Work Order 1412, Asset TV-TRUCK01, Service Truck). Check the **Storeroom Material Status** field, which may show **PARTIAL** if not all required materials are currently available, and note the job plan and other relevant details.

The screenshot shows the 'Work Order Tracking' interface in Maximo. The main content area displays details for Work Order 1412. The 'Storeroom Material Status' field is highlighted in yellow and shows the value 'PARTIAL'. Other fields include Work Order 1412, Location Bedford, Asset TV-TRUCK01, and Class WORKORDER. The 'Job Details' section shows Job Plan TVJP-1006 and Job Plan Revision # 0. The 'Asset Details' section shows Asset Up? checked, Warranties Exist? checked, SLA Applied? checked, and Charge to Store? checked. The 'Priority' section shows Asset Location Priority, Priority, Priority Justification, and Risk Assessment.

The Work Order Tracking screen displaying details for Work Order 1412, including asset, job plan, and storeroom material status set to PARTIAL.

Step 4: Review tasks and materials on the Plans tab

Click the **Plans** tab at the top of the work order screen to view the tasks and materials required for the job.



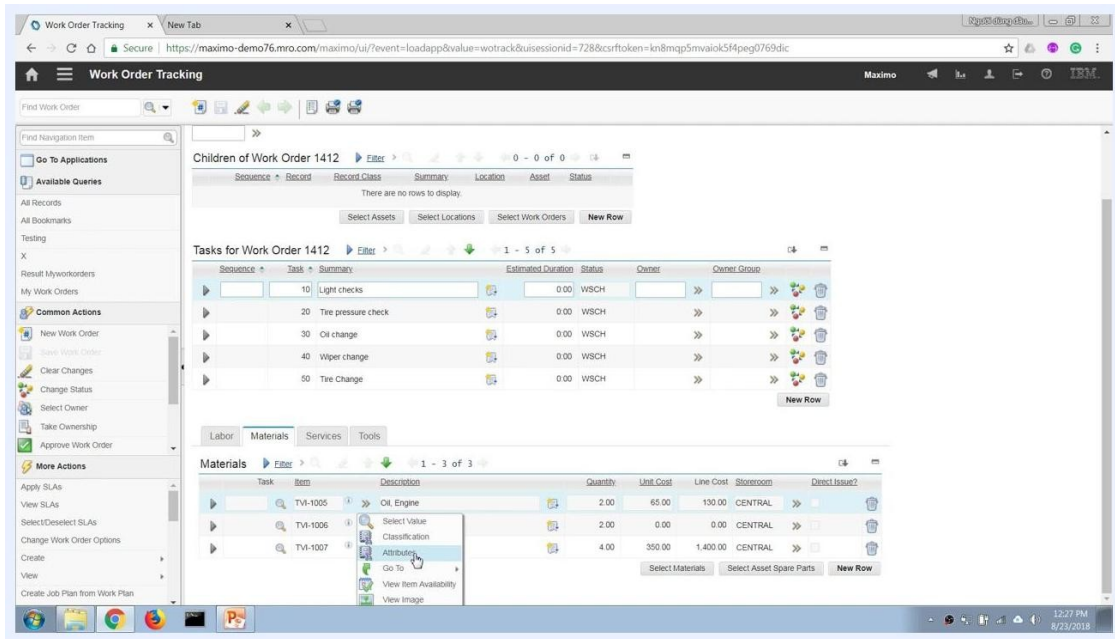
The cursor is about to select the **Plans** tab in the Work Order Tracking screen, with work order details visible.

Under **Tasks for Work Order 1412**, review each task, such as light checks, tire pressure check, oil change, wiper change, and tire change. In the **Materials** section, review the required items, their quantities, unit costs, line costs, and storeroom locations. For example:

- TVI-1005: Oil, Engine — Quantity 2.00, Storeroom CENTRAL
- TVI-1006: Wiper, Truck — Quantity 2.00, Storeroom CENTRAL
- TVI-1007: Wheel, Truck — Quantity 4.00, Storeroom CENTRAL

Step 5: Check item availability

Right-click or use the dropdown menu on an item row and select **View Item Availability** to confirm stock levels. For example, checking "Oil, Engine" (TVI-1005) confirms that the storeroom has sufficient stock, such as 9 units available against a requirement of 2.



The Materials tab is open, showing a dropdown menu for Oil, Engine (TVI-1005) with the **View Item Availability** option highlighted.

Repeat the **View Item Availability** check for each required item. If an item, such as "Wiper, Truck" (TVI-1006), shows zero units available in the storeroom, this material is not in stock and must be procured through a purchase requisition.

The screenshot shows the IBM Maximo Work Order Tracking application. The 'Materials' tab is active, displaying the 'View Item Availability' option for the 'Wiper, Truck' (TVI-1006). The interface includes a left sidebar with navigation options like 'Go To Applications', 'Available Queries', and 'Common Actions'. The main area displays fields for Work Order (1412), Location (Service Truck), Asset (TV-TRUCK21), and various status and action checkboxes. The bottom status bar shows the date 8/23/2018 and time 12:26 PM.

The Materials tab is open, showing the **View Item Availability** option for Wiper, Truck (TVI-1006), indicating a check for stock shortages.

Step 6: Identify the item to procure

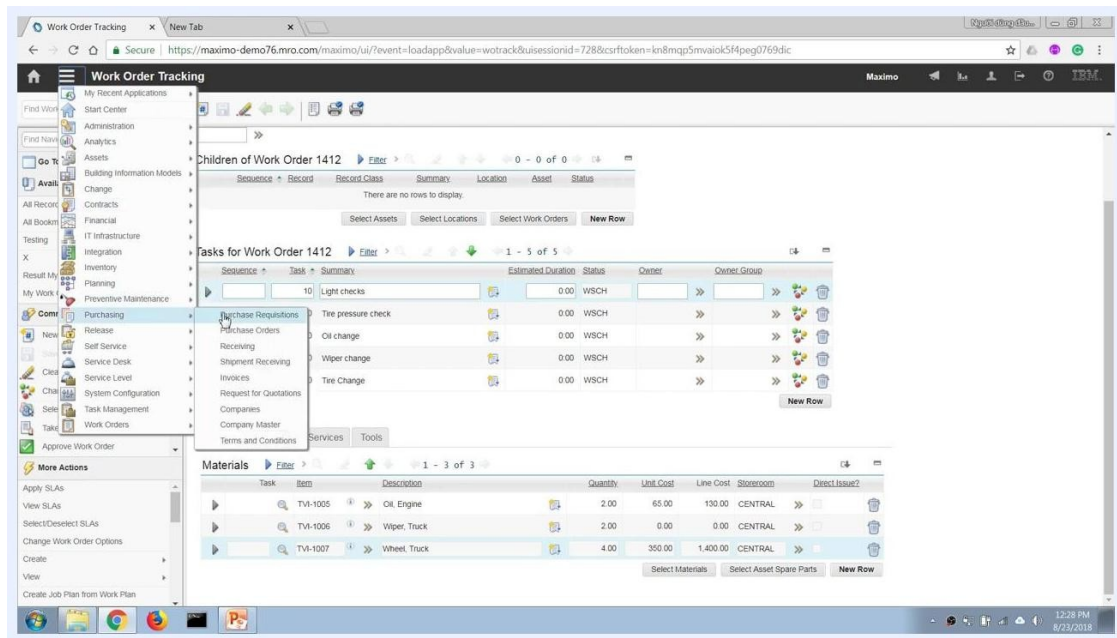
Open the **Materials** tab if it is not already open and locate the item with zero stock, such as TVI-1006: Wiper, Truck. Note the item number and description, since you will need this information to raise the purchase requisition.

The screenshot displays the 'Work Order Tracking' application interface. The top navigation bar includes tabs for 'Work Order', 'Plans', 'Assignments', 'Related Records', 'Actuals', 'Safety Plan', 'Log', 'Failure Reporting', 'Specifications', 'Service Address', and 'Map'. The 'Work Order' tab is active, showing a form for 'Work Order 1412'. The 'Materials' section is expanded, displaying a list of materials with columns for 'Material Status', 'Material Description', and 'Material Status Last Updated'. The 'Job Details' section shows 'Job Plan: TVJP-1006' and 'Job Plan Revision #: 0'. The 'Asset Details' section shows 'Asset Up?' and 'Asset Location Priority'. The 'Priority' section shows 'Priority' and 'Priority Justification'. The 'Risk Assessment' section shows 'Risk Assessment'.

The Work Order Tracking screen with the Materials tab open, ready to retrieve the item number for procurement.

Step 7: Open the Purchase Requisitions application

Open the **Go To Applications** menu, hover over or click **Purchasing** to expand the submenu, and select **Purchase Requisitions** from the dropdown list.



The Maximo Work Order Tracking screen with the Go To Applications menu open, Purchasing expanded, and Purchase Requisitions highlighted.

In the Purchase Requisitions application, click the option to create a new purchase requisition, such as **New Purchase Requisition** under Common Actions. A new purchase requisition form opens.

Step 8: Enter the purchase requisition details

In the **PR** tab, enter a brief description in the **Description** field (for example, "Buy tire to replace on Truck1"). Confirm the PR number is auto-generated (for example, 1063) and that the **Site** field is set correctly (for example, BEDFORD).

The **Status** should be set to **WAPPR** (Waiting for Approval). The **Requested By** field may auto-populate (for example, MAXIMO). Enter or confirm the **Requested Date** and **Status Date** as needed.

The screenshot shows the Maximo Purchase Requisitions interface. The browser address bar displays the URL: <https://maximo-demo76.mro.com/maximo/ui/?event=loadapp&value=pr&uisessionid=728&csrfToken=kn8map5mvaick5f4peg0769dic>. The page title is "Purchase Requisitions". The left sidebar contains navigation links such as "Go To Applications", "Available Queries", "All Records", "Purchase Requisitions Awaiting Approval", "Common Actions" (New Purchase Requisition, Save Purchase Requisition, Clear Changes, Change Status, Approve Purchase Requisition, Complete Purchase Requisition, Create Report), and "More Actions" (View History, Create PO, Create Contract, View Related Records, Modify/Delete Work Log, Create Communication, Attachment Library/Folders, Duplicate Purchase Requisition, Add to Bookmarks). The main content area has tabs for "List View", "PR", "PR Lines", "Ship To / Bill To", "Terms and Conditions", "Log", and "Specifications". The "PR" tab is active, showing details for PR 1063. The description is "Buy tire to replace on Truck1". The status is "WAPPR" and the site is "BEDFORD". The "Details" section includes fields for Priority (0), Status Date (6/22/18 10:28 PM), Requested By (MAXIMO), Supervisor, Contract Reference, Contract Type, and Contract Revision. The "Dates" section shows Status Date and Requested Date (6/22/18 10:28 PM). The "Costs" section displays Pretax Total (0.00), Total Tax (0.00), Total Cost, Currency (USD), and Total Base Cost (0.00). The "Vendor" section includes fields for No Vendor?, Internal?, Company, Address, City, State/Province, ZIP-Postal Code, Storeroom, Storeroom Site, Freight Terms, Payment Terms, and Ship Via.

The Purchase Requisitions screen with the PR tab open, description entered as "Buy tire to replace on Truck1", and other details visible.

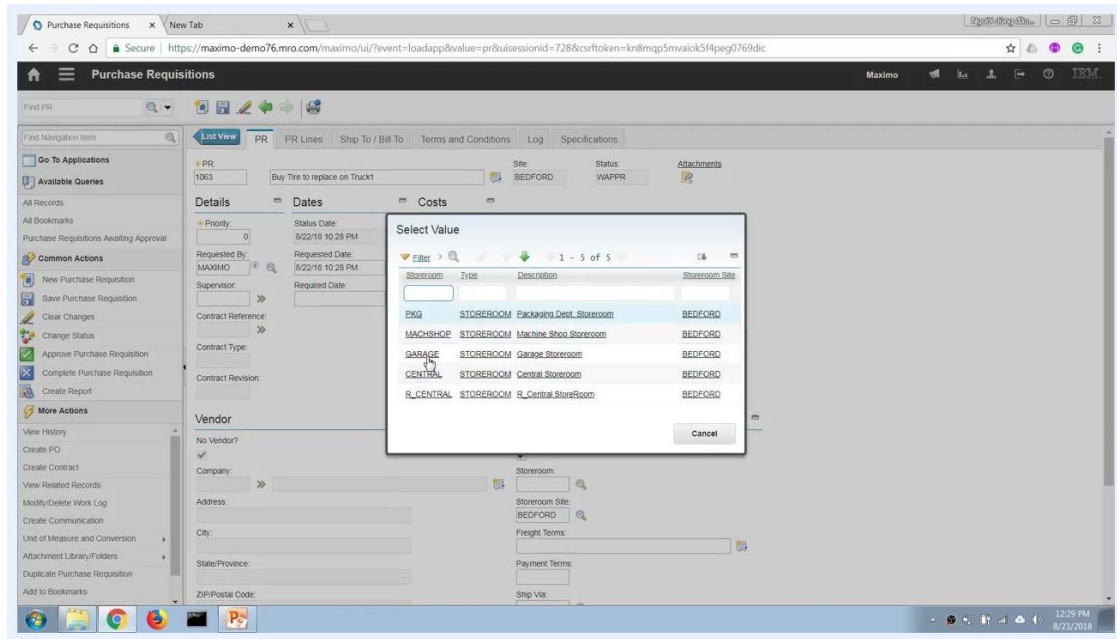
Step 9: Indicate whether a vendor is specified

If you do not want to specify a vendor, check the **No Vendor?** checkbox in the Vendor section and leave the vendor fields, such as Company and Address, blank.

The screenshot displays the Maximo Purchase Requisitions interface. The browser address bar shows the URL: <https://maximo-demo76.mro.com/maximo/ui/?event=loadapp&value=pr&uisessionid=728&csrfToken=kn8mp5mvaioK5f4peg0769dic>. The page title is "Purchase Requisitions". The left sidebar contains navigation links such as "Go To Applications", "Available Queries", "All Records", "Purchase Requisitions Awaiting Approval", "Common Actions", and "More Actions". The main content area is divided into several tabs: "List View", "PR Lines", "Ship To / Bill To", "Terms and Conditions", "Log", and "Specifications". The "List View" tab is active, showing a table with columns for "PR", "Buy", "Site", "Status", and "Attachments". The first row shows a PR number of 1063, a description of "Buy Tire to replace on Truck1", a site of BEDFORD, and a status of WAPPR. Below the table, the "Details" section is expanded, showing fields for "Priority", "Status Date", "Requested By", "Supervisor", "Contract Reference", "Contract Type", and "Contract Revision". The "Dates" section shows "Status Date" and "Requested Date" as 8/22/18 10:28 PM. The "Costs" section shows "Pretax Total", "Total Tax", "Total Cost", and "Total Base Cost" as 0.00. The "Vendor" section is at the bottom, with the "No Vendor?" checkbox selected. Other fields in the Vendor section include "Company", "Address", "City", "State/Province", "ZIP/Postal Code", "Internal?", "Storeroom", "Storeroom Site", "Freight Terms", "Payment Terms", and "Ship Via".

The Purchase Requisitions screen with **No Vendor?** checkbox selected and vendor fields left blank.

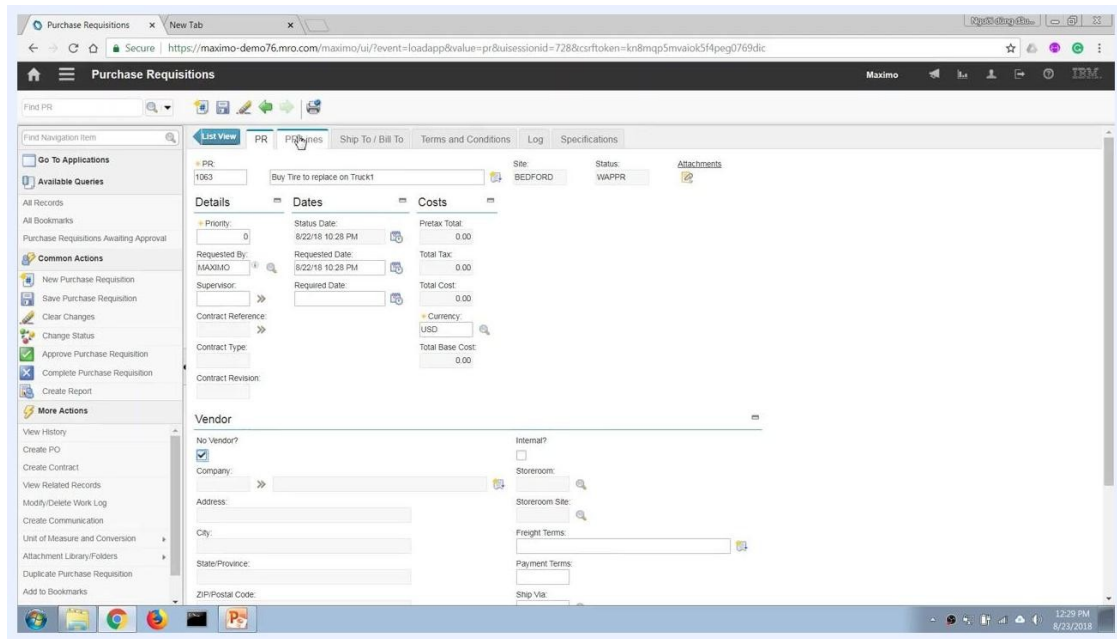
If the item is available in another internal storeroom or warehouse, you can select **Internal?** instead of **No Vendor?**. Click the lookup icon next to the **Storeroom** field to choose from available storerooms, such as PKG, MACHSHOP, GARAGE, CENTRAL, or R_CENTRAL. For an external purchase, leave **Internal?** unchecked.



The Purchase Requisitions screen with the Select Value dialog open, listing available storerooms such as PKG, MACHSHOP, GARAGE, CENTRAL, and R_CENTRAL.

Step 10: Add PR line items

Click the **PR Lines** tab at the top of the purchase requisition form to add line items, then click **New Row** to add a new item to the requisition. Specify the item number (for example, TVI-1007 for "Wheel, Truck") and the required quantity (for example, 4), filling in additional fields such as description, unit cost, or storeroom as prompted.

The screenshot shows the Maximo web application interface for Purchase Requisitions. The browser address bar displays a URL with session and token parameters. The page title is "Purchase Requisitions". On the left, there is a navigation pane with sections like "Go To Applications", "Available Queries", "All Records", "Purchase Requisitions Awaiting Approval", "Common Actions" (including New, Save, Clear, Approve, Complete, and Create), and "More Actions" (including View History, Create PO, Create Contract, View Related Records, Modify/Delete Work Log, Create Communication, Unit of Measure and Conversion, Attachment Library/Folders, Duplicate Purchase Requisition, and Add to Bookmarks). The main content area has a tabbed interface with "List View", "PR Lines", "Ship To / Bill To", "Terms and Conditions", "Log", and "Specifications". The "PR Lines" tab is active, showing fields for PR number (1063), description ("Buy Tire to replace on Truck1"), Site (BEDFORD), and Status (WAPPR). Below these are sections for "Details", "Dates", "Costs", and "Vendor". The "Details" section includes fields for Priority, Requested By (MAXIMO), Supervisor, Contract Reference, Contract Type, and Contract Revision. The "Dates" section includes Status Date and Requested Date (8/22/18 10:28 PM). The "Costs" section includes Pretax Total, Total Tax, Total Cost, Currency (USD), and Total Base Cost. The "Vendor" section includes checkboxes for "No Vendor?" and "Internal?", and fields for Company, Address, City, State/Province, ZIP/Postal Code, Storeroom, Storeroom Site, Freight Terms, Payment Terms, and Ship Via. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 12:29 PM on 8/23/2018.

The Purchase Requisitions screen with the PR Lines tab about to be selected, ready to add new items to the requisition.

Step 11: Define the item and quantity

Enter the item number as TV-1007 and the item description as "Wheel, Truck." Set the quantity to 4.00, the order unit and issue unit to EACH, and the unit cost to 350.00. The line cost calculates automatically as 1,400.00, and the category should be set to STK.

Leave the condition code, catalog number, commodity group, and commodity code blank unless specified, along with remarks, classification, and class description. Maximo automatically populates the remaining required information.

The screenshot displays the Maximo Purchase Requisitions interface. The top navigation bar includes a search bar and a 'Find PR' button. The left sidebar contains a 'Find Navigation Item' search bar and a list of 'Available Queries' and 'Common Actions'. The main content area is divided into several sections:

- Item Information:** Item: TV-1007, Condition Code: Wheel, Truck, Category: STK, Catalog #: , Commodity Group: , Commodity Code: .
- Remarks:** A text field for additional notes.
- Classification:** A dropdown menu for classifying the requisition.
- Class Description:** A text field for a detailed description.
- Quantity and Costs:** Quantity: 4.00, Tax Code: , Tax: 0.00, Issue Unit: EACH, Loaded Cost: 1,400.00, Conversion Factor: 1.00, Unit Cost: 350.00, Line Cost: 1,400.00.
- Charge To:** Storeroom: CENTRAL, Work Order: , WO Task: , Location: , Asset: , GL Debit Account: 6600-000-000.
- Related Records:** A section for viewing related records.
- Details:** A section for additional details.

The bottom status bar shows the date and time: 12:30 PM 8/23/2018.

Purchase Requisitions screen showing item TV-1007 (Wheel, Truck), quantity 4, unit cost 350, line cost 1,400, and category STK. Charge To section shows storeroom CENTRAL.

Step 12: Specify the delivery location

In the **Charge To** section, set the **Storeroom** field to CENTRAL to indicate the item will be delivered to the CENTRAL storeroom. Leave the **Work Order, WO Task, Location,** and **Asset** fields blank unless the item should be charged directly to a work order or asset.

The screenshot displays the Maximo Purchase Requisitions interface. The browser address bar shows a URL from maximo-demo76.mro.com. The page title is 'Purchase Requisitions'. A notification banner at the top states 'BMXAAA42061 - Record has been saved.' The left sidebar contains navigation links such as 'Go To Applications', 'Available Queries', 'All Records', 'Purchase Requisitions Awaiting Approval', 'Common Actions', and 'More Actions'. The main content area is divided into several sections. The 'Line Item' section shows details for Line 1, including 'Item' (TV-1007), 'Condition Code', 'Remarks', 'Classification', and 'Class Description'. The 'Quantity and Costs' section displays 'Quantity' (4.00), 'Tax Code', 'Order Unit' (EACH), 'Issue Unit' (EACH), 'Conversion Factor' (1.00), 'Unit Cost', 'Loaded Cost' (1,400.00), and 'Contract Reference'. The 'Charge To' section is the focus, showing 'Storeroom' set to 'CENTRAL', with other fields like 'Work Order', 'WO Task', 'Location', and 'Asset' left blank. A 'Receipt Required?' checkbox is checked. The bottom status bar indicates the time as 12:30 PM on 6/23/2018.

Purchase Requisitions screen with storeroom set to CENTRAL, indicating delivery location.

Step 13: Choose direct issue to a work order (optional)

If you do not want the item to go through the storeroom, leave the **Storeroom** field blank and enter the **Work Order** number (for example, 1412) to issue the item directly to the work order. When a work order is specified and the storeroom is left blank, the storeroom field locks, indicating a direct issue that becomes a direct expense to the work order or project.

The screenshot displays the Maximo Purchase Requisitions interface. The main form shows a line item for 'Wheel, Truck' with a quantity of 4.00 and a loaded cost of 1,400.00. The 'Storeroom' field is blank, and the 'Work Order' field is populated with '1412'. A 'Work Order Details' popup is visible, showing details for work order 1412, including the status 'WSCH', the asset 'TV:TRUCK01', and the owner 'Maximo'. The popup also shows the work order class 'WORKORDER' and the configuration item 'My Truck'. The background form includes fields for 'Line', 'Line Type', 'Item', 'Condition Code', 'Remarks', 'Classification', 'Class Description', 'Quantity', 'Tax Code', 'Order Unit', 'Issue Unit', 'Conversion Factor', 'Contract Reference', 'Manufacturer', 'Model', 'Category', 'Catalog #', 'Receipt Required?', 'Inspection Required?', 'Issue on Receipt?', 'Charge to Store?', 'Distributed?', 'Copy to RFO?', 'Copy to Contract?', 'Tax Exempt?', and 'Consignment?'. The left sidebar contains navigation and action links, and the top bar shows the Maximo logo and user information.

Purchase Requisitions screen with storeroom blank and work order 1412 entered. Work Order Details popup is visible.

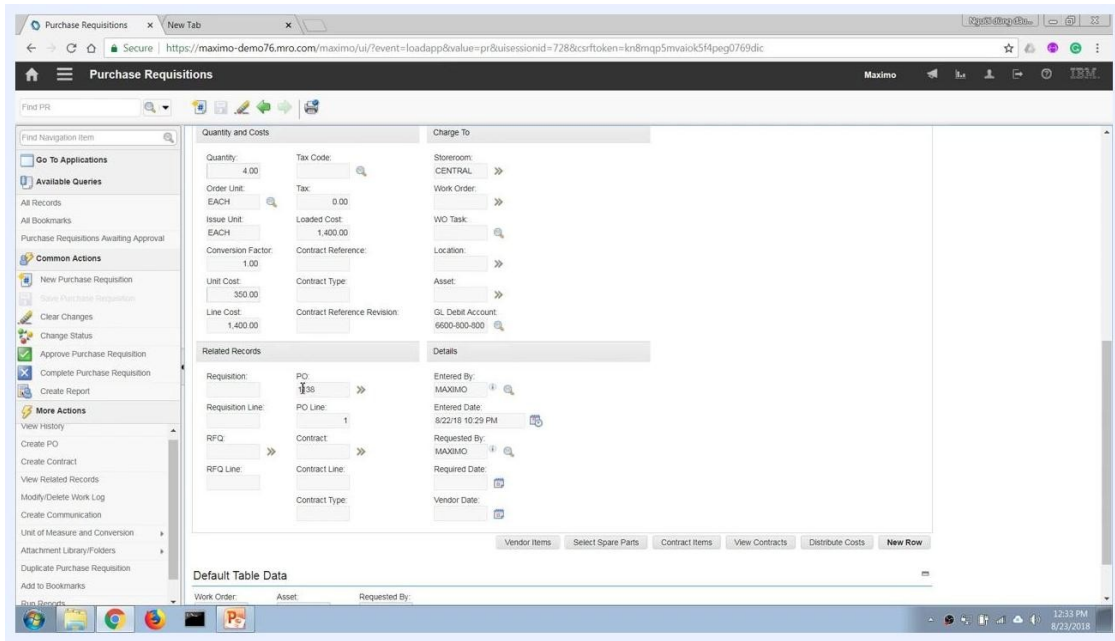
Review the financial implications of your choice: items bought into the storeroom are treated as a capital expenditure (capex), while items issued directly to a work order or project are treated as a direct expense (opex). Review the **GL Debit Account** and other financial fields as needed.

The screenshot displays the 'Purchase Requisitions' screen in the Maximo application. The interface includes a left-hand navigation pane with options like 'Go To Applications', 'Available Queries', and 'Common Actions'. The main content area is divided into several sections: 'Class Description', 'Quantity and Costs', 'Charge To', 'Related Records', and 'Details'. The 'Charge To' section is the primary focus, showing fields for 'Storeroom' (blank), 'Work Order' (1412), 'WO Task' (blank), 'Location' (blank), 'Asset' (TV-TRUCK01), and 'GL Debit Account' (blank). The 'Quantity and Costs' section shows 'Quantity' as 4.00, 'Order Unit' as blank, 'Issue Unit' as blank, 'Conversion Factor' as 1.00, 'Unit Cost' as 350.00, and 'Line Cost' as 1,400.00. The 'Related Records' section shows 'Requestion' as blank, 'Requestion Line' as blank, 'RFQ' as blank, and 'RFQ Line' as blank. The 'Details' section shows 'Entered By' as MAXIMO, 'Entered Date' as 8/22/18 10:29 PM, 'Requested By' as MAXIMO, and 'Required Date' as blank. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 12:30 PM on 8/23/2018.

Purchase Requisitions screen showing Charge To section with storeroom blank, work order 1412, and asset TV-TRUCK01.

Step 14: Check related inventory details

In the PR Lines section, use the context menu on the item (TV-1007), hover over **Go To**, and select either **Inventory** or **Item Master** to view more details about the item. This lets you check stock levels or item attributes before proceeding.



Context menu open on PR Lines item, showing Go To > Inventory and Item Master options.

Step 15: Save the purchase requisition

Click the save icon (diskette) in the toolbar to save your purchase requisition. Confirm that the record has been saved successfully by checking for a confirmation message such as "Record has been saved."

The screenshot shows the Maximo Purchase Requisitions screen. The left sidebar contains navigation and action menus. The main area is divided into several sections for data entry:

- Condition Code:** A dropdown menu.
- Remarks:** A text input field.
- Classification:** A dropdown menu.
- Class Description:** A text input field.
- Catalog #:** A dropdown menu.
- Commodity Group:** A dropdown menu.
- Commodity Code:** A dropdown menu.
- Charge to Store?** A checkbox.
- Distributed?** A checkbox.
- Copy to RFQ?** A checkbox.
- Copy to Contract?** A checkbox.
- Tax Exempt?** A checkbox.
- Consignment?** A checkbox.
- Quantity and Costs:** A section with fields for Quantity (4.00), Tax Code, Order Unit (EACH), Issue Unit (EACH), Conversion Factor (1.00), Unit Cost (350.00), and Line Cost (1,400.00).
- Charge To:** A section with fields for Storeroom (CENTRAL), Work Order, WO Task, Location, Asset, and GL Debit Account (9900-900-900).
- Related Records:** A section with fields for Requisition (PO) and Entered By (MAOIAO).

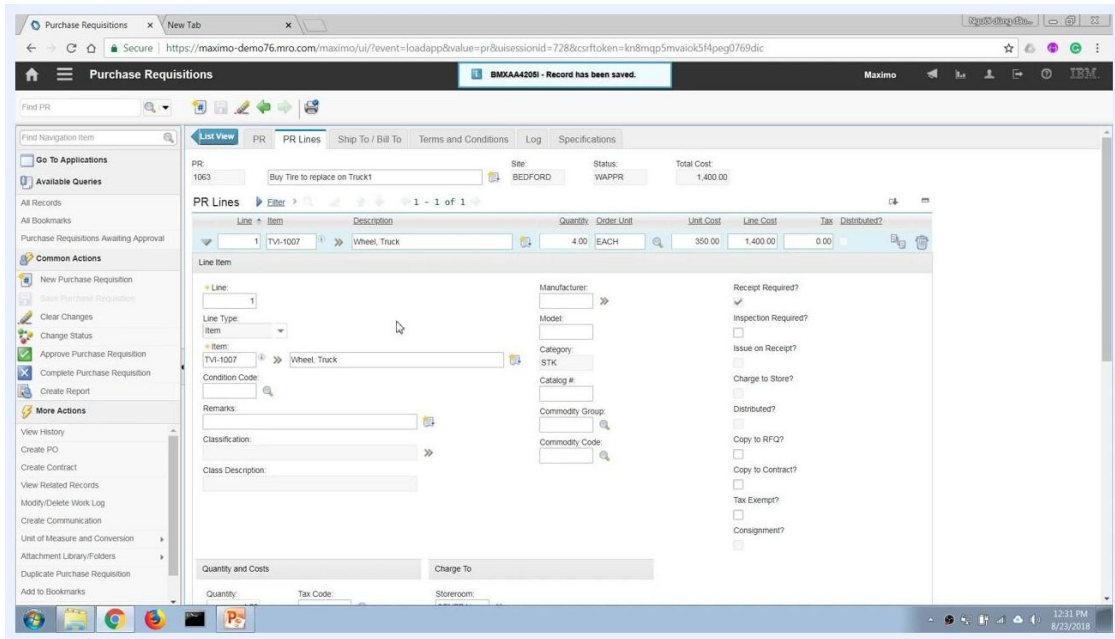
The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 12:31 PM on 8/23/2018.

Purchase Requisitions screen with all fields filled and ready to save.

By completing these steps, you have created a purchase requisition in Maximo, specified delivery to a storeroom or directly to a work order, and understood the financial implications of each option.

Step 16: Submit the purchase requisition for approval

Before submitting, confirm all required information is entered for your PR, such as PR 1063 for "Buy Tire to replace on Truck1." Ensure the item details — TV-1007, Wheel, Truck, Quantity 4, Unit Cost 350.00, Line Cost 1,400.00 — are correct, and verify the status is set to **WAPPR** (Waiting on Approval).



Purchase Requisitions screen showing PR 1063, item TV-1007, all line details, and status WAPPR.

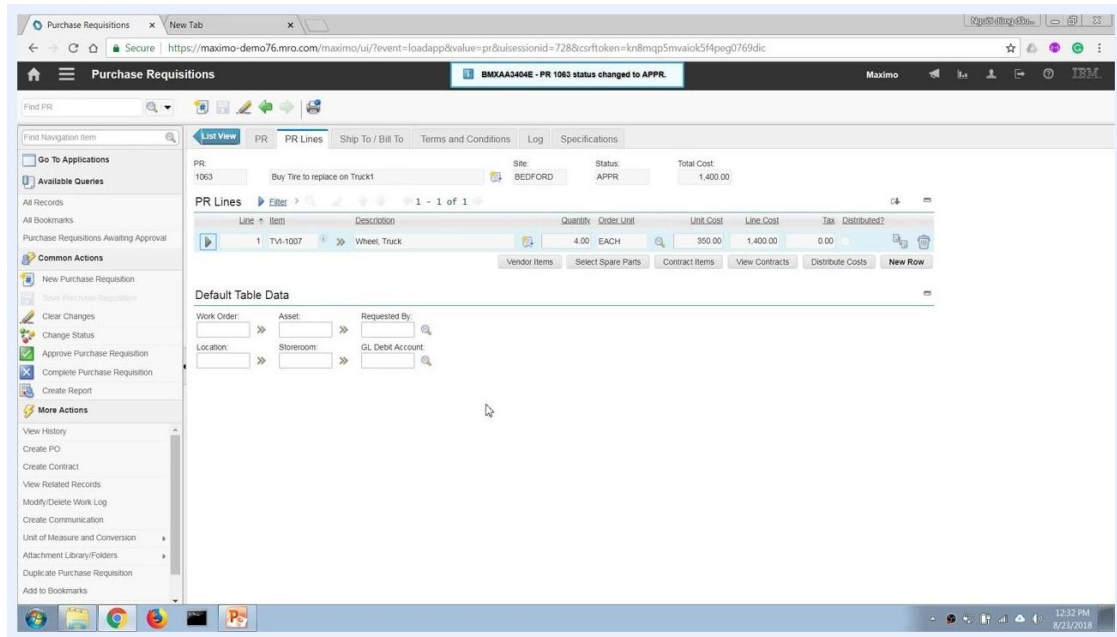
Click **Change Status** from the left sidebar under Common Actions. In the **Change Status** dialog, review the current status (WAPPR) and PR details, select **Approved** from the **New Status** dropdown, set the **Status Date** as needed (for example, 8/22/18 10:31 PM), and optionally enter a memo for audit or tracking purposes. Click **OK** to confirm the status change.

Step 17: Understand the approval workflow

After submitting for approval, the PR may pass through several workflow steps, including:

- Supervisor review
- Procurement department review
- Financial department review for budget approval
- Final approval by authorized personnel

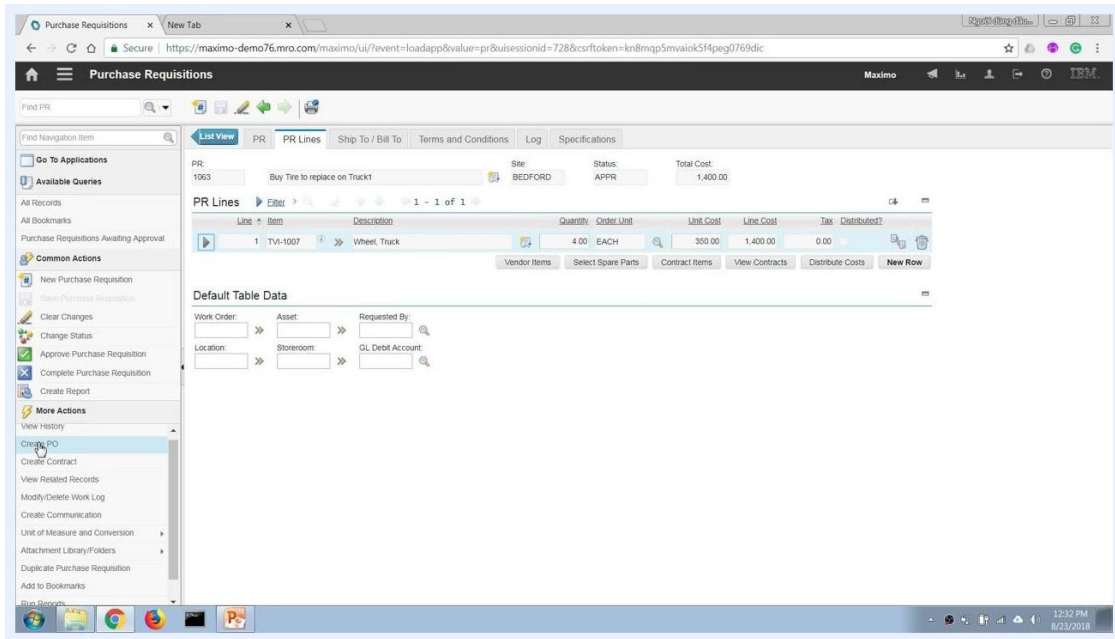
The PR status updates to **APPR** (Approved) once all workflow steps are completed.



Purchase Requisitions screen showing PR 1063 with status APPR and confirmation message.

Step 18: Convert the approved PR to a purchase order

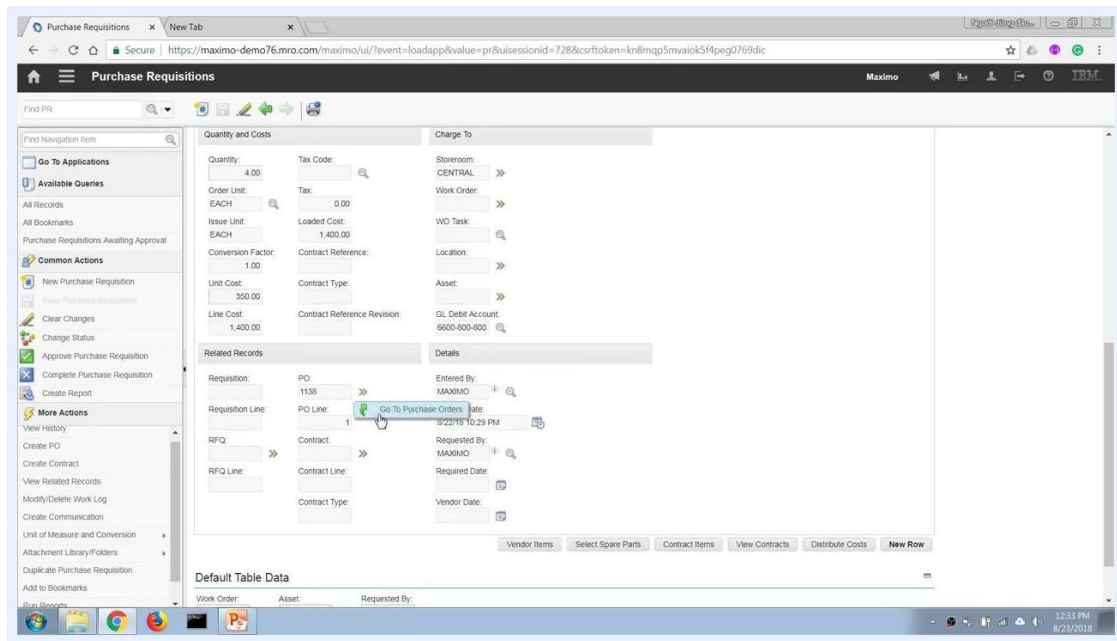
Once a PR is approved, procurement staff or authorized users can convert it into a work order or purchase order. To create a purchase order, click **More Actions** in the left sidebar and select **Create PO**. This action generates a PO number and moves the process forward.



Purchase Requisitions screen with More Actions menu open and Create PO highlighted.

Step 19: Verify the PR line association with the purchase order

In the PR details, check the **Related Records** section to confirm that the PR line has been brought over to PO 1138, PO Line 1. Review associated fields such as Quantity 4.00, Unit Cost 350.00, Line Cost 1,400.00, GL Debit Account 6600-800-800, Entered By MAXIMO, and Entered Date 8/22/18 10:29 PM. Click **Go To Purchase Orders** to navigate directly to the related PO.



Related Records section showing PO 1138 and Go To Purchase Orders option.

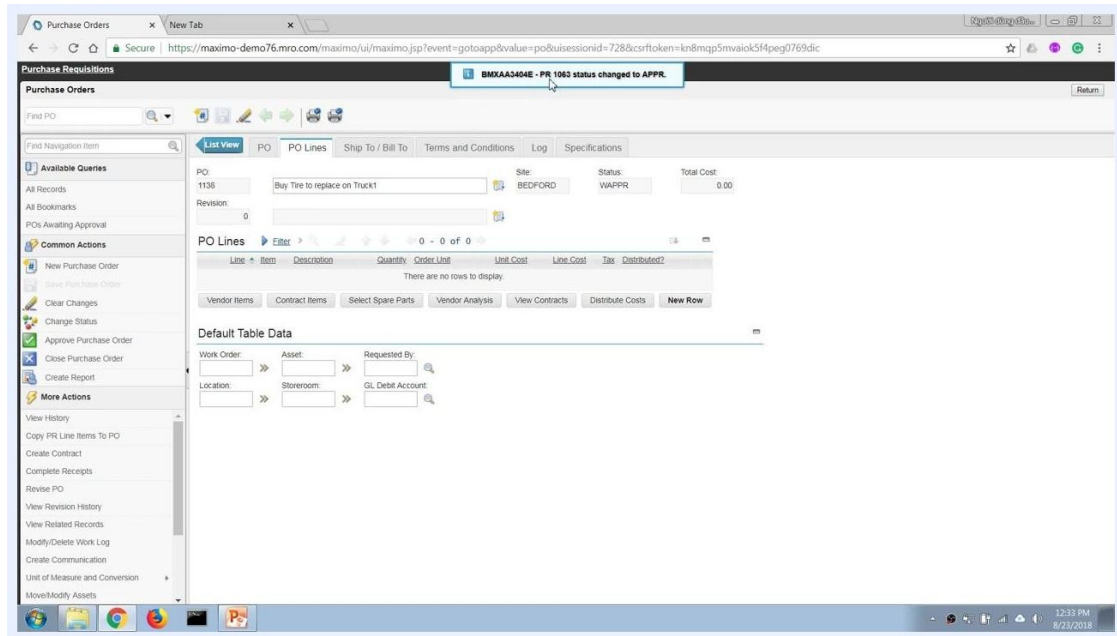
Step 20: Understand automatic status reversal on PO cancellation

If a PR line is copied to a PO and the PO is later cancelled, Maximo automatically reverses the PR status from **CLOSE** back to **APPR** (Approved). This ensures the PR can be processed again if the PO is not completed, and the PR Lines and details remain visible for review.

The screenshot displays the Maximo Purchase Requisitions interface. The left sidebar contains navigation and action menus. The main content area is divided into several sections: 'Quantity and Costs', 'Charge To', 'Related Records', and 'Details'. The 'Quantity and Costs' section shows a quantity of 4.00, order unit 'EACH', issue unit 'EACH', conversion factor 1.00, unit cost 350.00, and line cost 1,400.00. The 'Charge To' section shows tax code, tax, load cost, contract reference, contract type, contract reference revision, location, asset, and GL debit account. The 'Related Records' section shows a request for quotation (RFQ) with a line number of 1. The 'Details' section shows the entered by user (MAXIMO), entered date (8/22/18 10:29 PM), requested by user (MAXIMO), required date, and vendor date. The status of the requisition is 'CLOSE'. The bottom of the screen shows a 'Default Table Data' section with columns for Work Order, Asset, and Requested By.

Purchase Requisitions screen showing PR 1063 with status CLOSE and PR Lines.

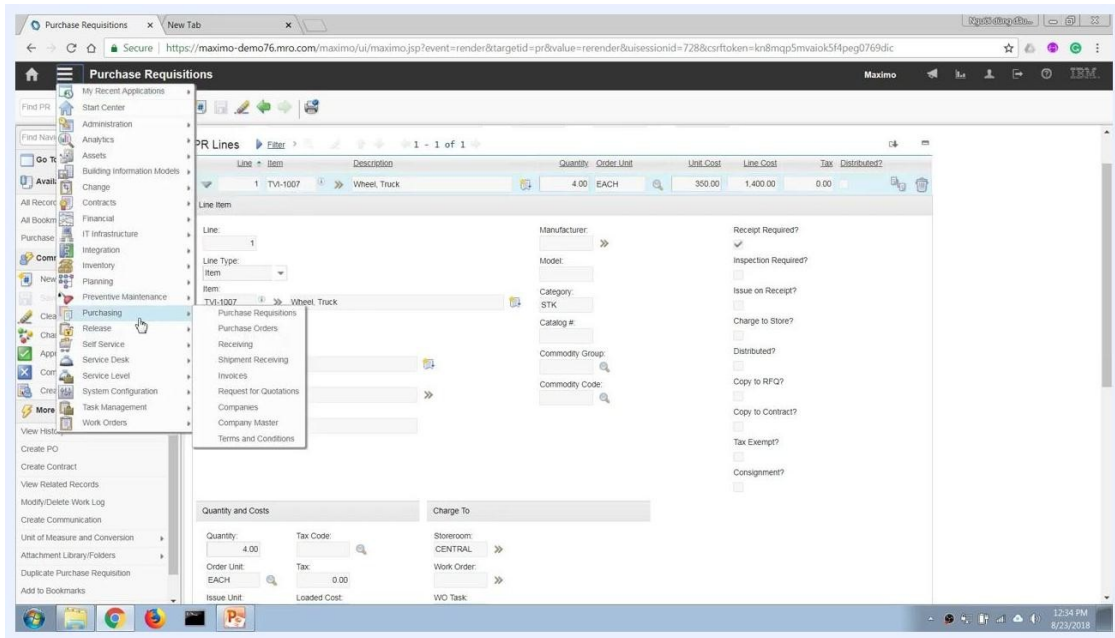
In the Purchase Orders application, remove the line item that was copied from the PR. Maximo updates the PR status accordingly, and you will see a notification such as "BMXAA43404E - PR 1063 status changed to APPR." The PR returns to **APPR** (Approved) status and can be processed again.



Purchase Orders screen with notification that PR 1063 status changed to APPR.

Step 21: Create a new purchase order from scratch

Open the navigation menu and go to **Purchasing > Purchase Orders** to create a new PO independently of any PR. The PR Lines screen remains available for reference.



Navigation menu open, highlighting Purchasing > Purchase Orders.

Step 22: Enter new purchase order details

In the Purchase Orders application, enter the following details:

- PO Number: 1139 (auto-generated or entered)
- Description: Purchase_Tire
- Site: BEDFORD
- Status: WAPPR (Waiting on Approval)
- Type: STD
- Status Date: 8/22/18 10:34 PM
- Ordered Date: 8/22/18 10:34 PM
- Currency: USD

Fill in additional fields such as Buyer, Vendor, and Costs as needed.

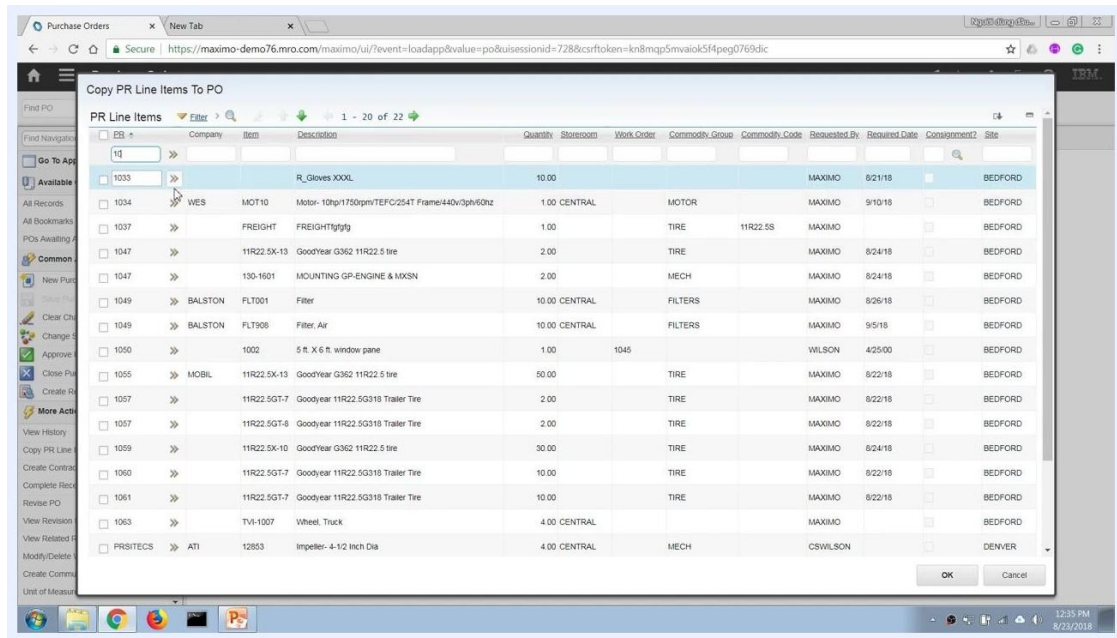
The screenshot displays the Maximo Purchase Orders interface. The browser address bar shows a URL from maximo-demo76.mro.com. The page title is 'Purchase Orders'. On the left, there is a navigation pane with sections like 'Go To Applications', 'Available Queries', 'All Records', 'All Bookmarks', 'POs Awaiting Approval', 'Common Actions', and 'More Actions'. The main content area is titled 'Purchase Orders' and shows a form for a new PO. The PO number is 1139, and the description is 'Purchase_Tire'. The status is 'WAPPR'. The site is 'BEDFORD'. The form includes tabs for 'Details', 'Dates', and 'Costs'. The 'Details' tab is active, showing fields for Type (STD), Status Date (8/22/18 10:34 PM), Buyer Company, Buyer, Priority, Receipts (NONE), Contract Reference, Contract Type, Contract Revision, and Release #. The 'Dates' tab shows Status Date, Ordered Date, Required Date, Follow-up Date, and Vendor Date. The 'Costs' tab shows Pretax Total, Total Tax, Total Cost, Currency (USD), and Total Base Cost. The Vendor section at the bottom has fields for Company, Internal?, Address, and Storeroom.

Purchase Orders screen with new PO 1139, description "Purchase_Tire", and status WAPPR.

Step 23: Specify delivery location and financial transaction type

Determine where the ordered items should be delivered. To deliver to a storeroom, enter the storeroom information in the **Storeroom** field (for example, CENTRAL); Maximo automatically populates related fields based on your entry, such as ordering 4 units of item TV-1007 (Wheel, Truck) to the CENTRAL storeroom.

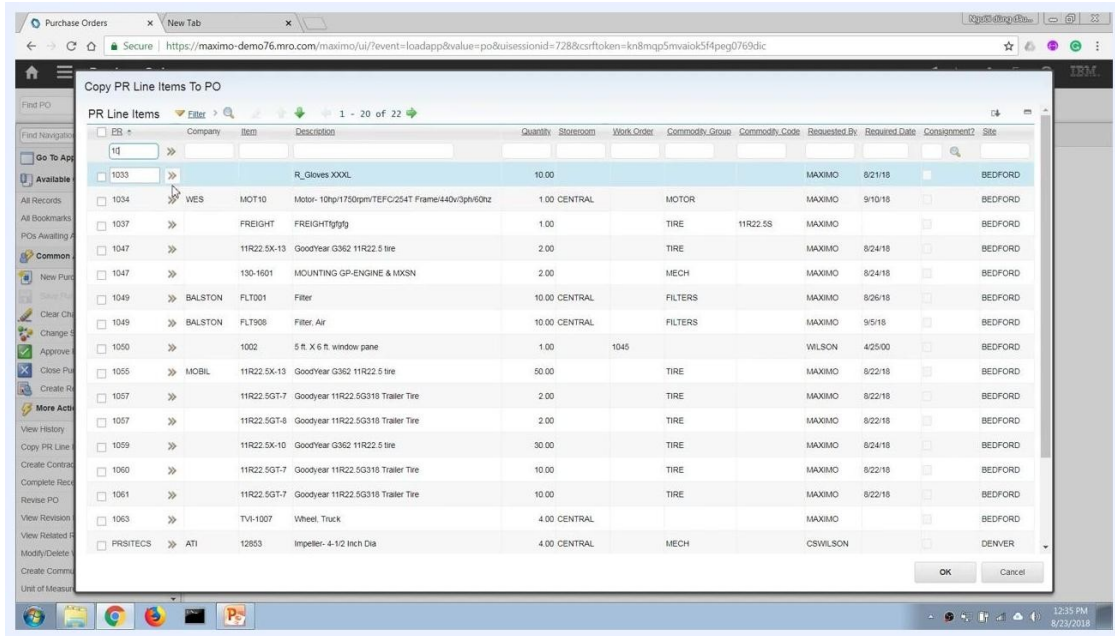
If you want a direct issue to a work order or project that bypasses the storeroom, enter the work order or project number in the **Work Order** field. The **Storeroom** field becomes locked, indicating a direct issue. This changes the financial transaction type: delivery to a storeroom is treated as capital expenditure (CAPEX), while a direct issue to a work order or project is treated as operational expenditure (OPEX). Save the purchase order record after entering all required information.



Purchase Orders screen with PO 1139, showing fields for delivery location, storeroom, and work order.

Step 24: Copy PR line items to the purchase order

Use the **Copy PR Line Items to PO** function to add items from existing purchase requisitions to your purchase order. In the dialog, search for the relevant PR line items (for example, by entering "1033" in the PR field) and review the list of available items, including Company, Item, Description, Quantity, Storeroom, Work Order, Commodity Group, Commodity Code, Requested By, Required Date, and Site. Select the items to copy and click **OK** to confirm.

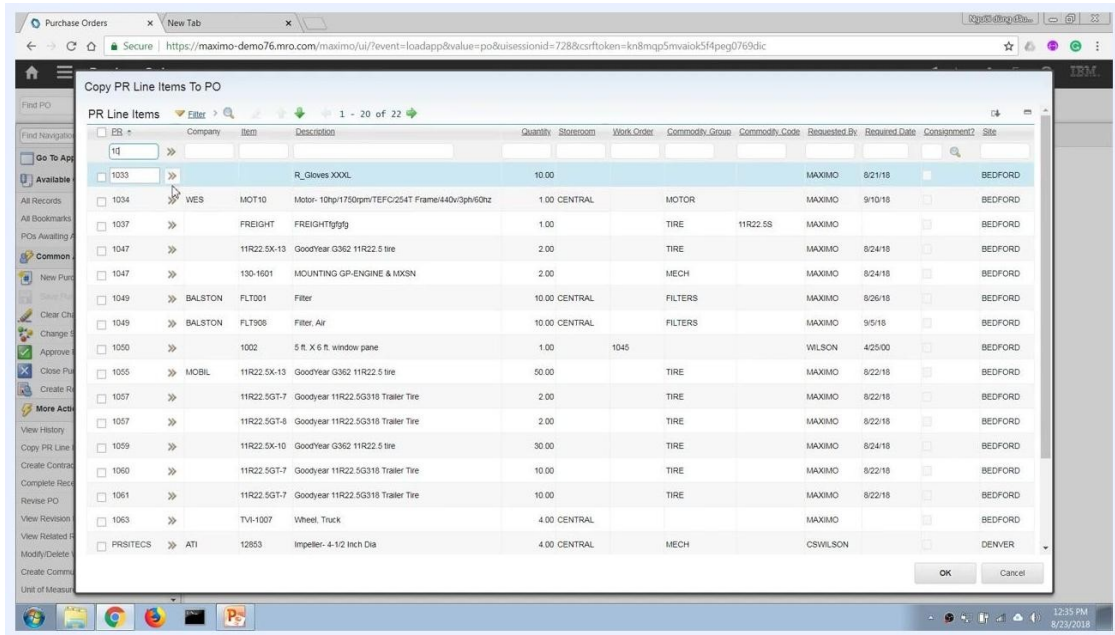


Copy PR Line Items to PO dialog showing a list of PR line items with details and selection options.

Step 25: Review and confirm PO line details

After copying PR line items, review the **PO Lines** tab to confirm the item (for example, TV-1007, Wheel, Truck), quantity (4.00 EACH), unit cost (350.00), and line cost (1,400.00), as well as the storeroom and other default table data.

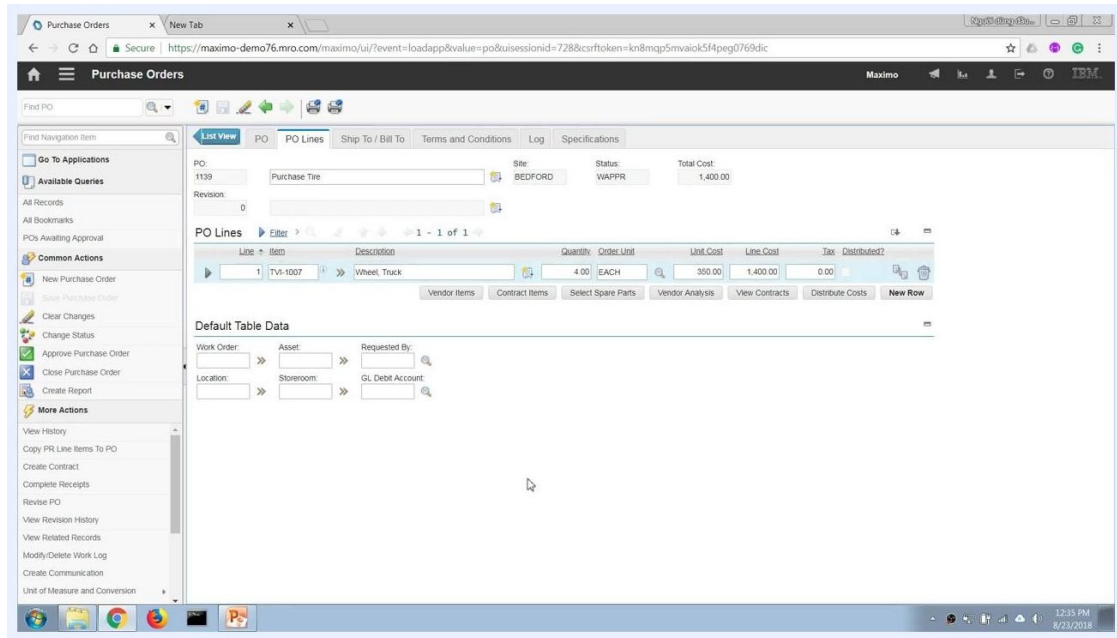
Watch for the notification at the top of the screen: "BMXAA43404E - PR 1063 status changed to CLOSE." This indicates that all actions on the PR line items have been completed and the PR is now closed.



PO Lines tab showing item details and notification that PR 1063 status changed to CLOSE.

Step 26: Finalize and save the purchase order

Ensure all PO line details are accurate and complete, then save the purchase order to finalize the transaction. The PO is now ready for subsequent processes such as receiving, material issue, and transfer.



PO Lines tab with finalized item details for PO 1139, ready for further processing.

What's next

With your purchase order saved, you can proceed to downstream logistics operations such as receiving the ordered items, issuing materials to the work order, and transferring stock between storerooms. This complete workflow — from checking inventory availability, through creating a purchase requisition in Maximo, to approving and converting it into a purchase order — supports both CAPEX and OPEX procurement scenarios and ensures accurate tracking throughout your supply chain process.