

Course Code: MAX4325G

Course Title: Maximo Application Suite - Manage: Purchasing and Contracts

Description:

This course provides students with an understanding of how purchasing and contracts are managed in MAS Manage including the overall Procurement process and lifecycle, creation of Purchase Orders, Purchase Requests, Invoices, RFQs and contracts. Students will learn about Purchasing and Contracts Applications that enable items to be ordered from vendors, and Purchase Order creation and Invoice Reversal. There is also hands-on lab exercises using a Red Hat OpenShift MAS Manage environment.

Objectives:

After completing this course, you should be able to:

- Describe the Purchasing and Contracts capabilities in Maximo Manage
- Create Company Master and Company records
- Set up the Purchasing options and configuration
- Create Contracts in Maximo Manage
- Create Purchase Requisitions and Purchase Orders
- Describe the Purchasing process and applications
- Create Invoices
- Perform the Purchasing and receiving process

Duration:

8 Hrs

Topics:

Module 1: Introduction to Purchasing

- Course Objectives
- Purchasing Process Overview
- Purchasing Lifecycle
- Company records
- PR and PO Status
- PR and PO Lines
- Contract Overview

Module 2: Contracts

- Master Contracts
- Purchase Contracts
- Price agreements
- Lease Rental Contracts
- Warranty Contracts

- Labor Contracts

Demonstration: Contracts

Student Exercises: Lab 1 Contracts

Module 3: Requisitioning

- Purchasing Process
- Desktop Requisitions
- Purchase Requisitions
- PR Types
- PR Status
- Purchase Orders
- PO Status
- Prorating Services
- Request for Quotations

Student Exercises: Labs 2 and 3 Requisitioning and Purchase Orders

Module 4: Receiving

- Purchasing Process
- Purchasing Lifecycle
- Receiving Materials and Services
- Receipt Types
- Line Status
- Returning Items
- Shipments
- Shipment Process

Student Exercises: Lab 4 Receiving

Module 5: Invoicing

- Purchasing Process
- Invoicing Overview
- Invoice Lines
- Invoice Types
- Invoice Status
- Invoice Matching
- Invoice Variance
- Invoice Reversal
- Staged Invoice Reversal

- Centralized Invoicing
- Automatic Processing of Service Receipts
- Invoice Transaction

Module 6: Purchasing Options

- Purchase Options Overview
- PO Options
- Contract Options
- Tax Options
- PO Labor Options
- Invoice Options

Demonstration: Purchasing Process

Student Exercises: Lab 5 - Invoicing

Audience:

Consultants, System Administrators, Support, Sales, and Users