Maximo Application Suite - Manage: Purchasing and Contracts

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Course#:MAX4325G
Duration:8 Hours
Price:1000.00
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Course 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

Audience

Consultants, System Administrators, Support, Sales, and Users

Prerequisites

None

Content

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