Maximo Application Suite - Manage: Purchasing and Contracts

Duration: 1 Day **Course Code: MAX4325G** **Delivery Method: Virtual Learning**

Overview:

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.

Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

Target Audience:

Consultants, System Administrators, Support, Sales, and Users

Objectives:

- After completing this course, participants 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

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

Additional Information:

Official course book provided to participants

Further Information:

For More information, or to book your course, please call us on 00 971 4 446 4987

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