

Maximo for the Supplier Portal



[Click here to begin.](#)

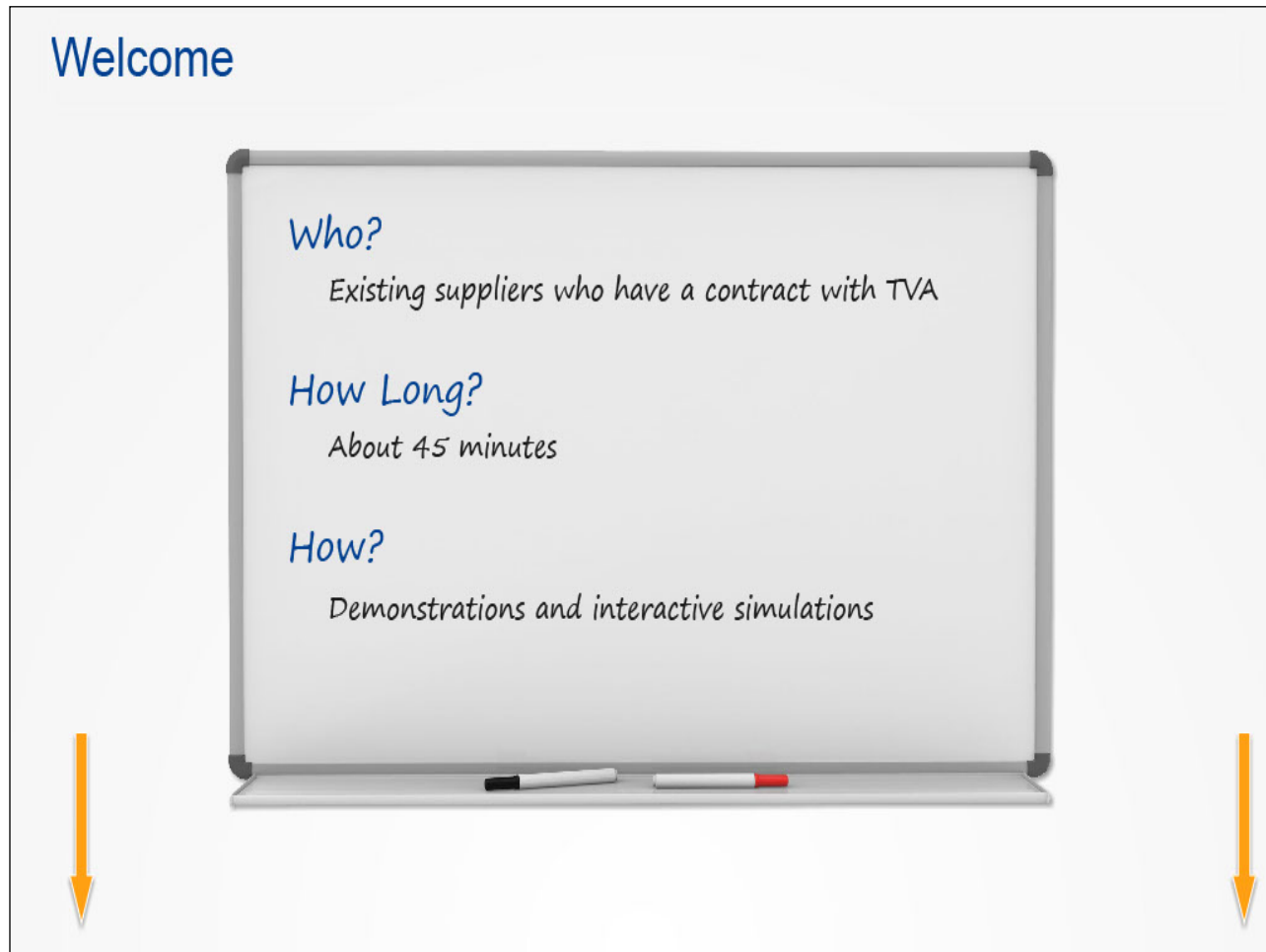
Slide notes

Enter slide note

Text Captions

Maximo for the Supplier Portal

Slide 2 - Welcome



Slide notes

Welcome to the Maximo for the Supplier Portal course. This course is designed for existing suppliers who have an active contract with TVA and want to conduct business using the portal. It should take about 45 minutes to complete, if you choose to take all of the lessons. You will learn about the portal and related applications through demonstrations and interactive simulations.

Use the Navigation bar at the bottom of the window to navigate the course. You may also use the Table of Contents on the left to access topics. Clicking the Closed Captioning button displays a transcription of the narration.

Ready? Let's get started.

Text Captions

Welcome

Who?

How Long?

How?

Existing suppliers who have a contract with TVA

About 45 minutes

Demonstrations and interactive simulations

Slide 3 - Course Objectives

Course Objectives

Lesson	After completing this course, you should be able to:
Portal Registration and Log In Process	Identify the steps to register for and log in to the Supplier Portal.
Working with the Companies Application	Describe how to update supplier information in the Companies application.
Submitting a Request for Quotation (RFQ/eRFQ) Response	Identify the steps to submit an Open RFQ and Targeted eRFQ.
Working with the TVA Subcontracting Accomplishments Application	Describe how to create and update records in the TVA Subcontracting Accomplishments application.
Working with the Purchase Contracts Application	Describe how to revise and view purchase contract details in the Purchase Contracts application.

Slide notes

This course is divided into the lessons listed here. Take a moment to review the course objectives.

Text Captions

Course Objectives

Working with the TVA Subcontracting Accomplishments Application

Describe how to create and update records in the TVA Subcontracting Accomplishments application.

Portal Registration and Log In Process

Identify the steps to register for and log in to the Supplier Portal.

Working with the Companies Application

Describe how to update supplier information in the Companies application.

Submitting a Request for Quotation (RFQ/eRFQ) Response

Identify the steps to submit an Open RFQ and Targeted eRFQ.

Describe how to revise and view purchase contract details in the Purchase Contracts application.

Working with the Purchase Contracts Application

Lesson

After completing this course, you should be able to:

Portal Registration and Log In Process



Overview

Registering for the Supplier Portal

Activating Your Password

Logging in to the Portal

Slide notes

Before you can access the Supplier portal, you need to register, activate your password, and then log in. This lesson covers these tasks.

Text Captions

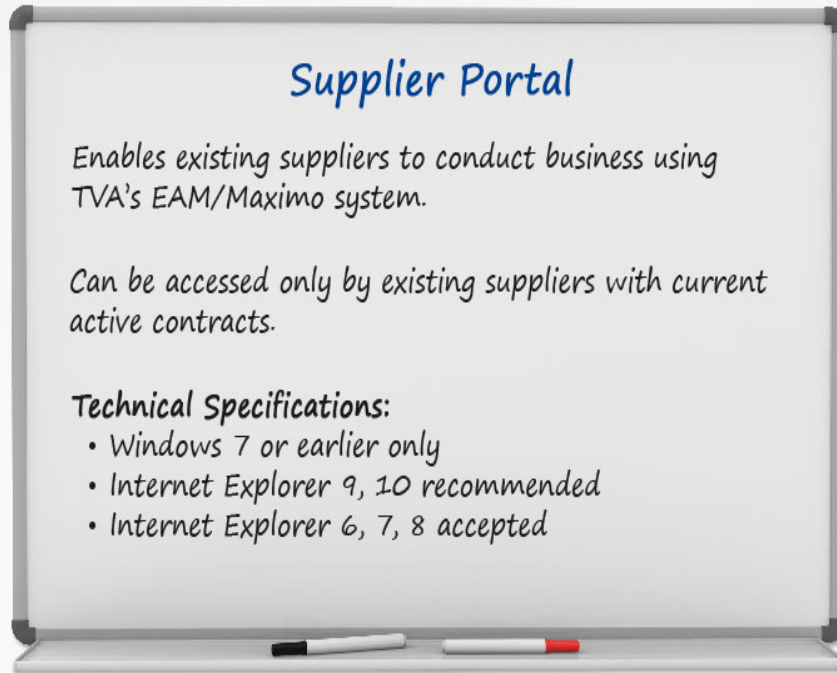
Overview

Registering for the Supplier Portal

Activating Your Password

Logging in to the Portal

Overview



Slide notes

The Supplier Portal enables existing suppliers to conduct business using TVA's EAM/Maximo system. For example, suppliers can update purchase order delivery dates and respond to RFQs.

Only existing suppliers with current active contracts can access the portal. And to access the content, your computer and browser must meet these specifications. If you run into any errors while working with the Maximo applications, check your browser version.

The rest of this lesson will step you through the registration and log in process using simulations of the screens.

Text Captions

Overview

Supplier Portal

Enables existing suppliers to conduct business using TVA's EAM/Maximo system.

Can be accessed only by existing suppliers with current active contracts.

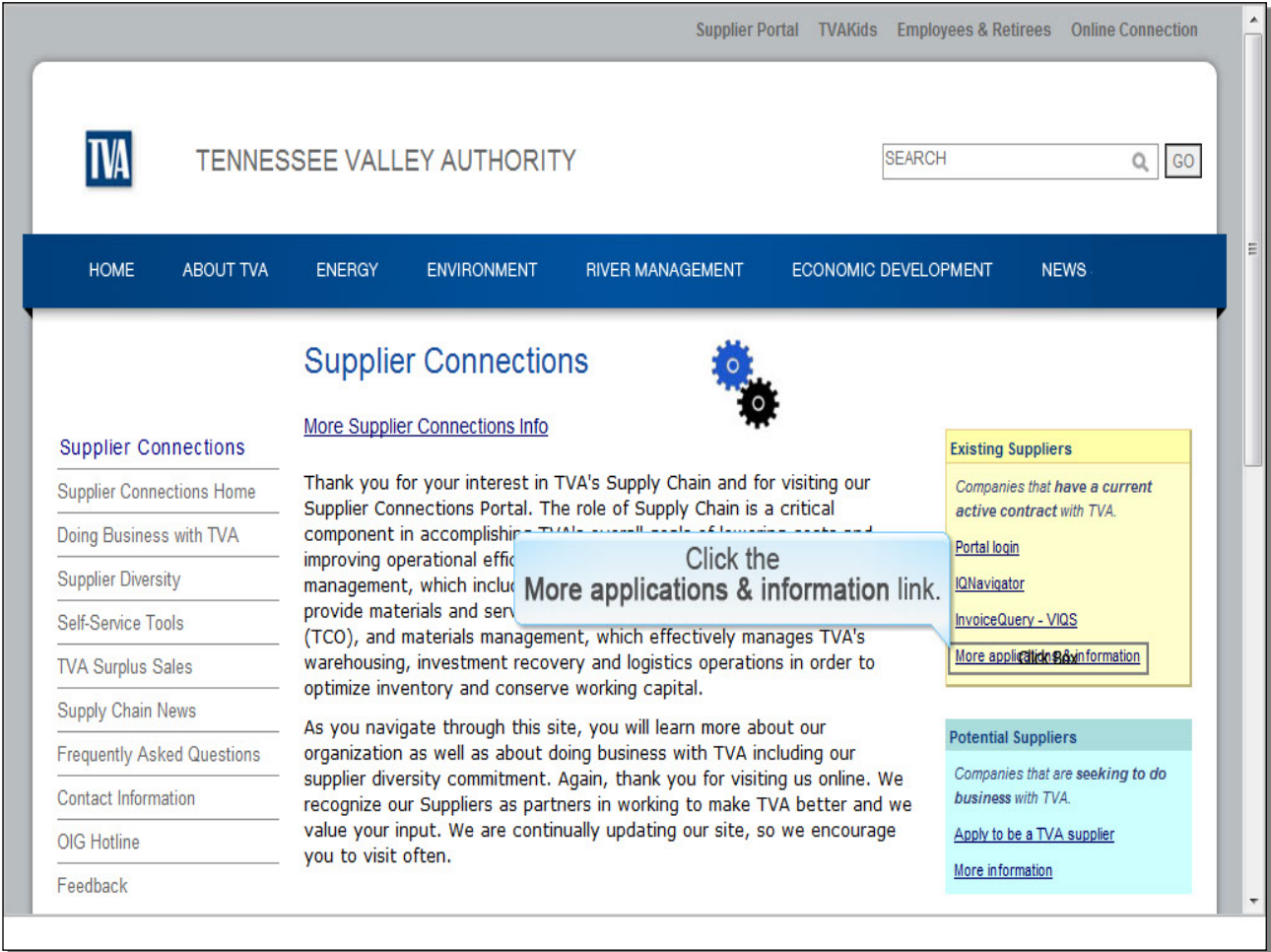
Technical Specifications:

Windows 7 or earlier only

Internet Explorer 9, 10 recommended

Internet Explorer 6, 7, 8 accepted

Slide 6 - Registering for the Supplier Portal



Slide notes


Your first step is to register for the Supplier Portal. You do this from the Supplier Connections home page. Follow the instructions to access the registration page.

Text Captions

Click the
More applications & information link.

Slide 7 - Registering for the Supplier Portal


Supplier PortalTVAKidsEmployees & RetireesOnline Connection

TENNESSEE VALLEY AUTHORITY

SEARCHGO

HOMEABOUT TVAENERGYENVIRONMENTRIVER MANAGEMENTECONOMIC DEVELOPMENTNEWS

Supplier Information



Supplier Connections

Supplier Connections Home

Doing Business with TVA

Supplier Diversity

Self-Service Tools

TVA Surplus Sales

Supply Chain News

Frequently Asked Questions

Contact Information

OIG Hotline

Feedback

For **existing suppliers** who have a current active contract with TVA.

Supplier Connections Portal

Our suppliers must accommodate TVA's diverse business needs to support our generation, delivery, and business services organizations while fulfilling TVA's mission. Companies with active contracts can conduct business by logging into or registering to access the Supplier Connections Portal and using the EAM/Maximo system. These suppliers are also able to update their purchase order delivery dates, contract line updates and contract pricing, contract downloads, respond to RFQs & RFIs, manage their company information, update company achievements against

Existing Suppliers

Companies that **have a current active contract** with TVA.

[Login](#)

[More information](#)

Potential Suppliers

Companies that are **seeking to do business** with TVA.

[Apply to be a TVA supplier](#)

[More information](#)

Documents

Click the Register link.

[Login](#)

[Click Here](#)

[Recover/Activate your password](#)

Slide notes

Text Captions

Click the **Register** link.

Slide 8 - Registering for the Supplier Portal

TVA my InsideNet Monday, April 06, 2015

Thank you for your interest in registering to access our online facilities. Our interfaces are designed to make it easier for our partners to do business with us.

***Preferred User ID:** (e.g. hlsmith) ***First Name:** **Initials:**
***2nd Choice User ID:** (e.g. howlsmith) ***Last Name:** **Suffix:** (Jr., III)
***Password:** [password rules](#) **Job Title:**
***Retype Password:** ***Organization Type:**
***Address:** ***Organization Name:**
***City:** ***Email:** (e.g. 123-456-7890)
***State:** ***ZIP Code:** (5-digit)
Click anywhere to continue.
Submit Registration

You will be notified via email of your acceptance status within two business days after your application is received. *Note: you will not be able to access any part of our services requiring sign-on until your registration is approved.*

If you do not receive an email notification within 3-5 days, contact TVA at SupplierConnections@tva.gov.

Slide notes

The next step is to complete the fields in the registration form. Make sure you select "Supplier" for the Organization Type. After you're finished, click the Submit Registration button.

You will receive an email notification once your application has been approved. If you don't receive a notification, contact TVA using this email address.

Look over this screen and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 9 - Activating Your Password

Supplier Portal TVA Kids Employees & Retirees Online Connection

TVA TENNESSEE VALLEY AUTHORITY

SEARCH GO

HOME ABOUT TVA ENERGY ENVIRONMENT RIVER MANAGEMENT ECONOMIC DEVELOPMENT NEWS

Supplier Connections

[More Supplier Connections Info](#)

Supplier Connections

- Supplier Connections Home
- Doing Business with TVA
- Supplier Diversity
- Self-Service Tools
- TVA Surplus Sales
- Supply Chain News
- Frequently Asked Questions
- Contact Information
- OIG Hotline
- Feedback

Thank you for your interest in TVA's Supply Chain and for visiting our Supplier Connections Portal. The role of Supply Chain is a critical component in accomplishing TVA's overall goals of business cost reduction, improving operational efficiency, and managing risk. Supply Chain management, which includes procurement, inventory management, and logistics, provides materials and services (TCO), and materials management, which effectively manages TVA's warehousing, investment recovery and logistics operations in order to optimize inventory and conserve working capital.

As you navigate through this site, you will learn more about our organization as well as about doing business with TVA including our supplier diversity commitment. Again, thank you for visiting us online. We recognize our Suppliers as partners in working to make TVA better and we value your input. We are continually updating our site, so we encourage you to visit often.

Existing Suppliers

Companies that have a current active contract with TVA.

- [Portal login](#)
- [IQNavigator](#)
- [InvoiceQuery - VIQS](#)
- [More applications & information](#)

Potential Suppliers

Companies that are seeking to do business with TVA.

- [Apply to be a TVA supplier](#)
- [More information](#)

Click the **More applications & information link.**

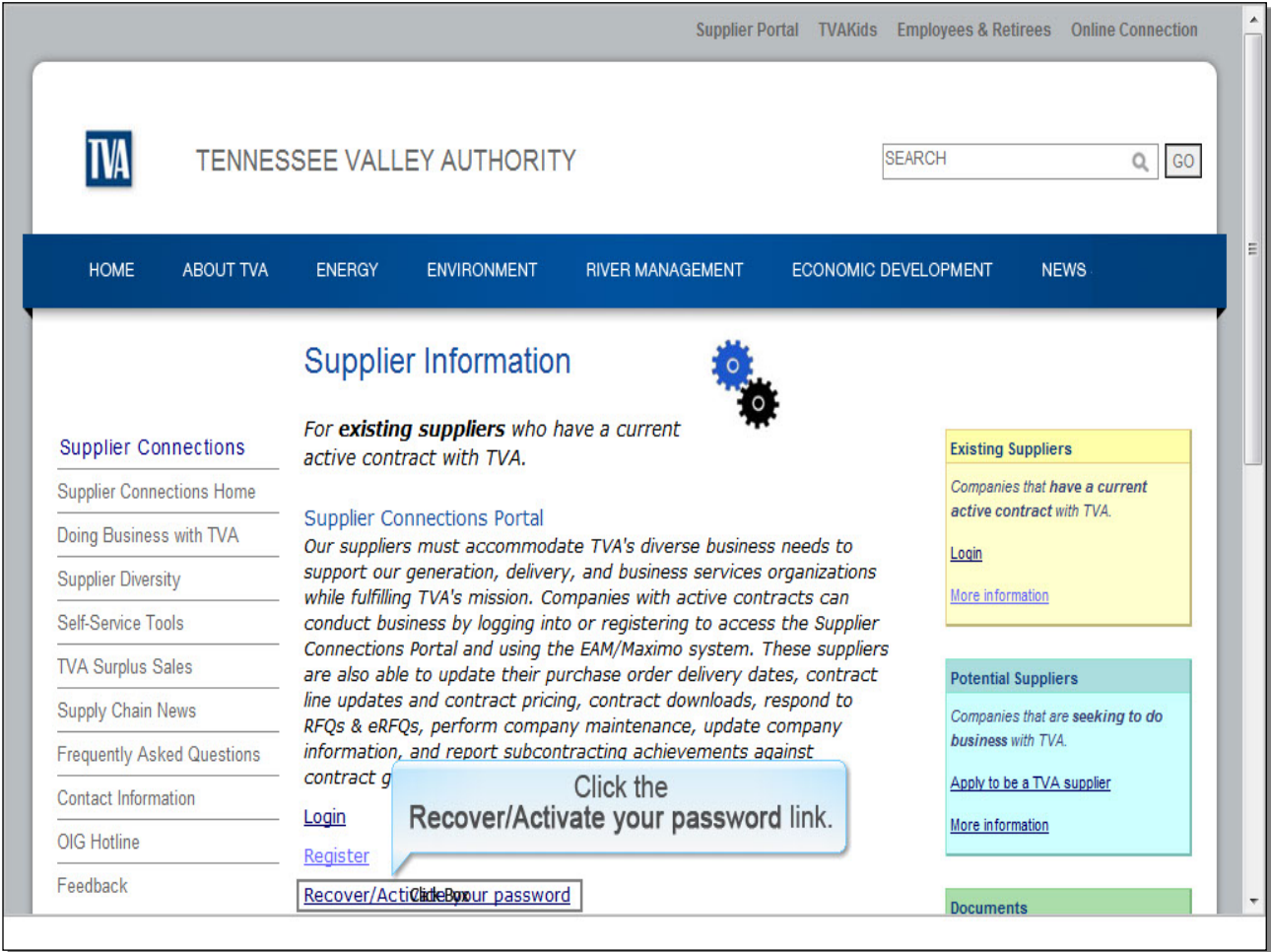
Slide notes

After receiving your approval notification, access the Supplier Connections home page again to activate your password.

Text Captions

Click the
More applications & information link.

Slide 10 - Activating Your Password

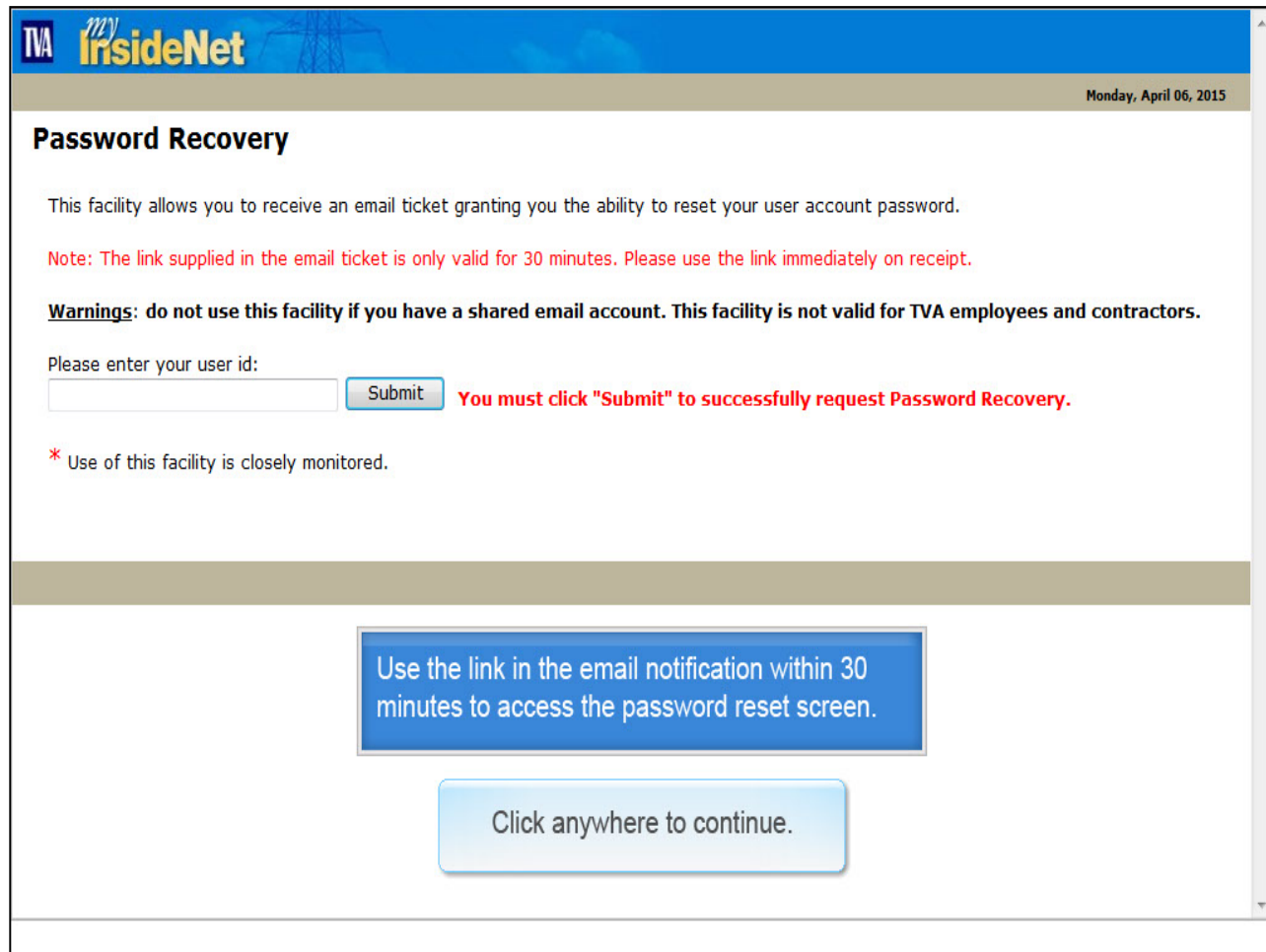


Slide notes

Text Captions

Click the
Recover/Activate your password link.

Slide 11 - Activating Your Password



The screenshot shows a web browser window with the TVA my InsideNet logo in the top left and the date "Monday, April 06, 2015" in the top right. The main heading is "Password Recovery". Below this, a paragraph states: "This facility allows you to receive an email ticket granting you the ability to reset your user account password." A red note follows: "Note: The link supplied in the email ticket is only valid for 30 minutes. Please use the link immediately on receipt." A warning is displayed: "Warnings: do not use this facility if you have a shared email account. This facility is not valid for TVA employees and contractors." Below the warning, a form asks for the user ID: "Please enter your user id:" followed by a text input field and a "Submit" button. To the right of the button, a red instruction reads: "You must click 'Submit' to successfully request Password Recovery." A red asterisk note at the bottom left of the form area says: "* Use of this facility is closely monitored." Below the form area, a blue box contains the text: "Use the link in the email notification within 30 minutes to access the password reset screen." At the bottom of the page, a light blue button says: "Click anywhere to continue."

Slide notes

Here you enter the user id provided in your email notification.

You will receive an email with a password reset link within 30 minutes of submitting the password recovery request. It's important to use the link immediately, because it expires after 30 minutes.

Look over this screen and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 12 - Activating Your Password



The screenshot shows a web interface for 'myInsideNet'. At the top, there is a blue header with the 'TVA myInsideNet' logo and a date 'Monday, April 06, 2015'. Below the header, a message states: 'You must set a new password to recover access to your account.' A large black rectangular area is present, likely a placeholder for a video or image. Below this, there are two input fields: 'New Password:' and 'Confirm Password:'. To the right of the 'Confirm Password:' field is a blue 'Update' button.

After completing this screen, you are taken to a login screen.

Do not use that login screen. Instead, navigate back to the Supplier Connections home page.

Click anywhere to continue.

Slide notes

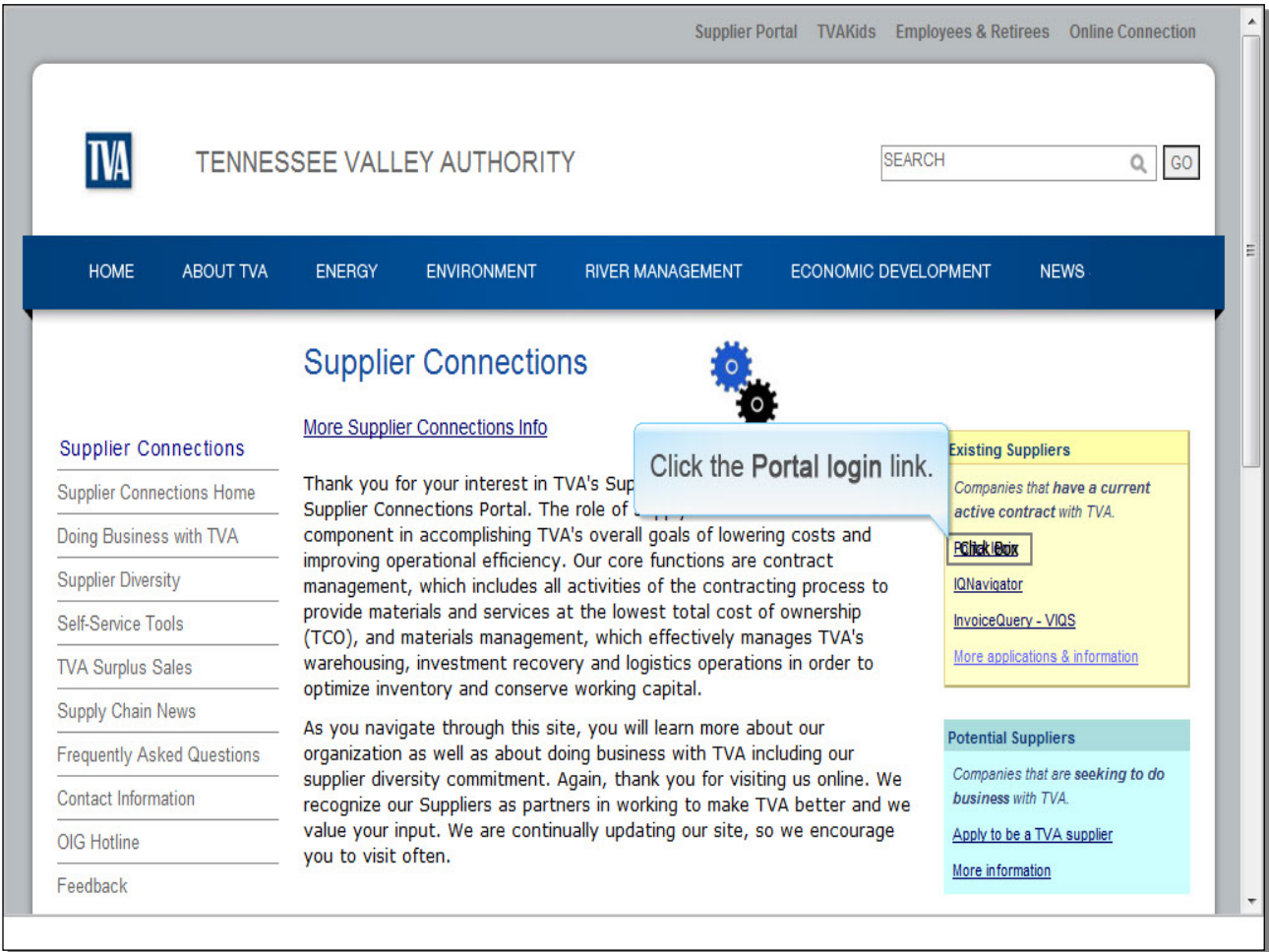
After accessing this screen, you enter your new password and click the Update button. You are then taken to a login screen, but do NOT use that screen. Instead, navigate back to the Supplier Connections home page.

Look this over and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 13 - Logging in to the Portal



Slide notes

After accessing the Supplier Connections home page, you're ready to log in to the portal. To do this, click the Portal login link.

Text Captions

Click the **Portal login** link.

Slide 14 - Logging in to the Portal

TVA my InsideNet

Monday, April 06, 2015

Please enter your Network ID and Password.

User ID:

Password:

☐ Remember me on this computer.

Submit

Click anywhere to continue.

AUTHORIZED USERS ONLY

This is a TVA information system which includes this computer, the information contained within this computer, this computer network, all computers connected to this network, and all related equipment, networks, and devices, is provided for authorized TVA use only. Unauthorized or improper use of this system is strictly prohibited.

You have no explicit or implicit expectation of privacy regarding any communications or data transiting or stored on this information system. Data, including personal information, placed on, stored or sent over this system may be intercepted, monitored, recorded, copied, audited, inspected, or disclosed by TVA, the United States, and third party entities.

Unauthorized or improper use of this system may result in administrative action, civil and/or criminal prosecution and penalties, or other personnel actions.

By using this system you indicate your awareness of and consent to these terms and conditions. LOG OFF IMMEDIATELY if you do not agree to the conditions stated herein.

Slide notes

Here you enter your User ID and password, and then click Submit.

Text Captions

Click anywhere to continue.

Slide 15 - Logging in to the Portal



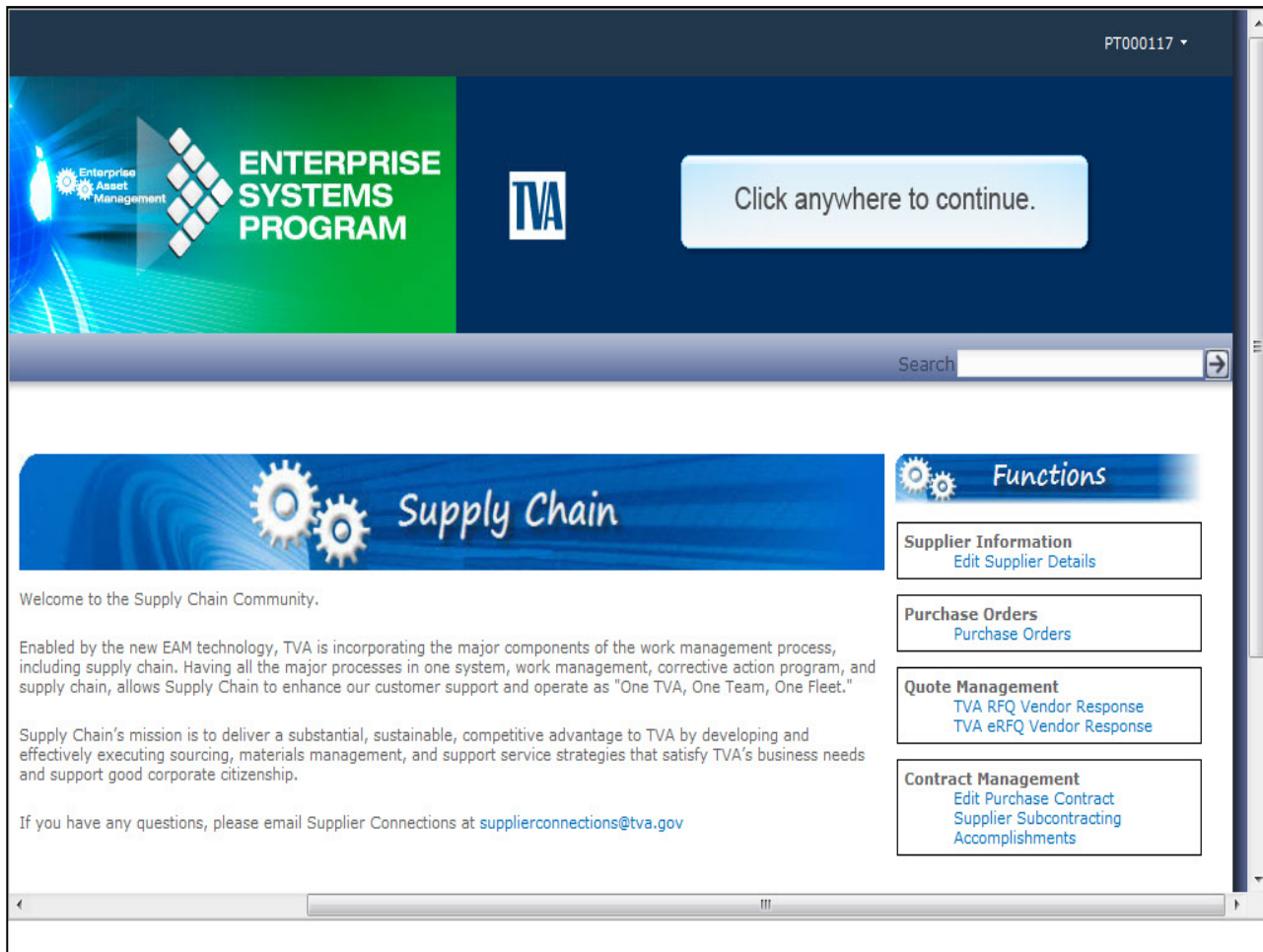
Slide notes

After you log in, the Supplier Portal home page is displayed. Click inside the scroll bar to view the right side of the screen.

Text Captions

Click inside the scroll bar.

Slide 16 - Logging in to the Portal



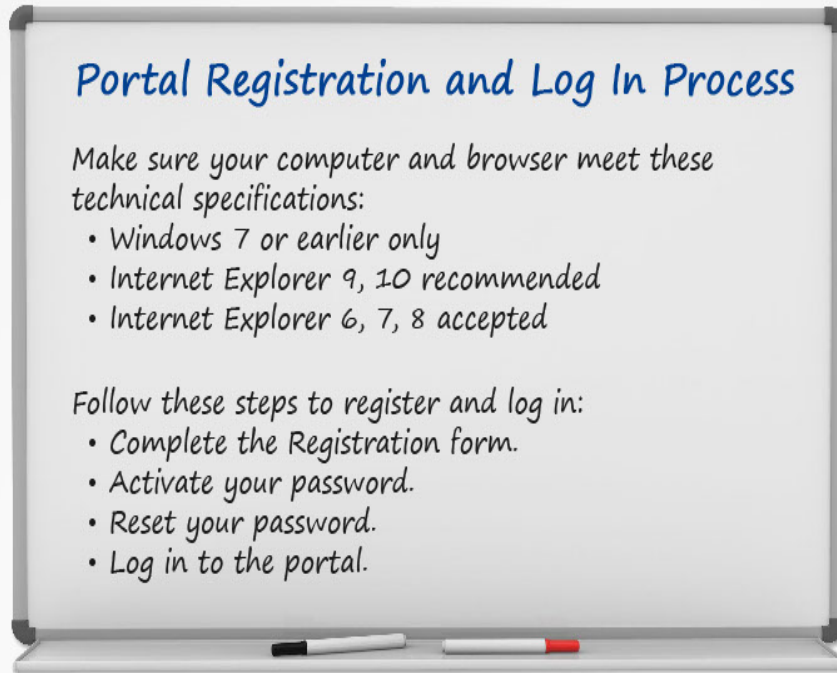
Slide notes

The remaining lessons in this course cover the frequently-used applications in the Functions section.

Text Captions

Click anywhere to continue.

Summary



Refer to the **Supplier Portal Instructions** job aid in the Supplier Connections Portal for a summary of the steps covered in this lesson.

Slide notes

This concludes the lesson. Take a moment to review the key points covered.

Text Captions

Summary

Make sure your computer and browser meet these technical specifications:

Windows 7 or earlier only

Internet Explorer 9, 10 recommended

Internet Explorer 6, 7, 8 accepted

Follow these steps to register and log in:

Complete the Registration form.

Activate your password.

Reset your password.

Log in to the portal.

Portal Registration and Log In Process

Refer to the **Supplier Portal Instructions** job aid in the Supplier Connections Portal for a summary of the steps covered in this lesson.

Working with the Companies Application



Overview

Adding a Contact

Accessing the Application

Navigating Using the Go To Menu

Viewing the Company Record

Editing the Record

Slide notes

In this lesson, you'll learn how to work with the Companies application, including accessing it, viewing and editing the company record, and adding a contact.

Text Captions

Overview

Accessing the Application

Viewing the Company Record

Editing the Record

Adding a Contact

Navigating Using the Go To Menu

Overview



Slide notes

The Companies application in Maximo contains detailed information about TVA vendors. You can use this application to update this information as needed, such as contact names and phone numbers, company classification, and diversity details.

Keep in mind that when you access the application, you will have access to only your company's records, which is tied to your login information.

For training purposes, we're going to work with the record for a fictional company, named XYZ Incorporated.

Text Captions

Overview

Companies Application

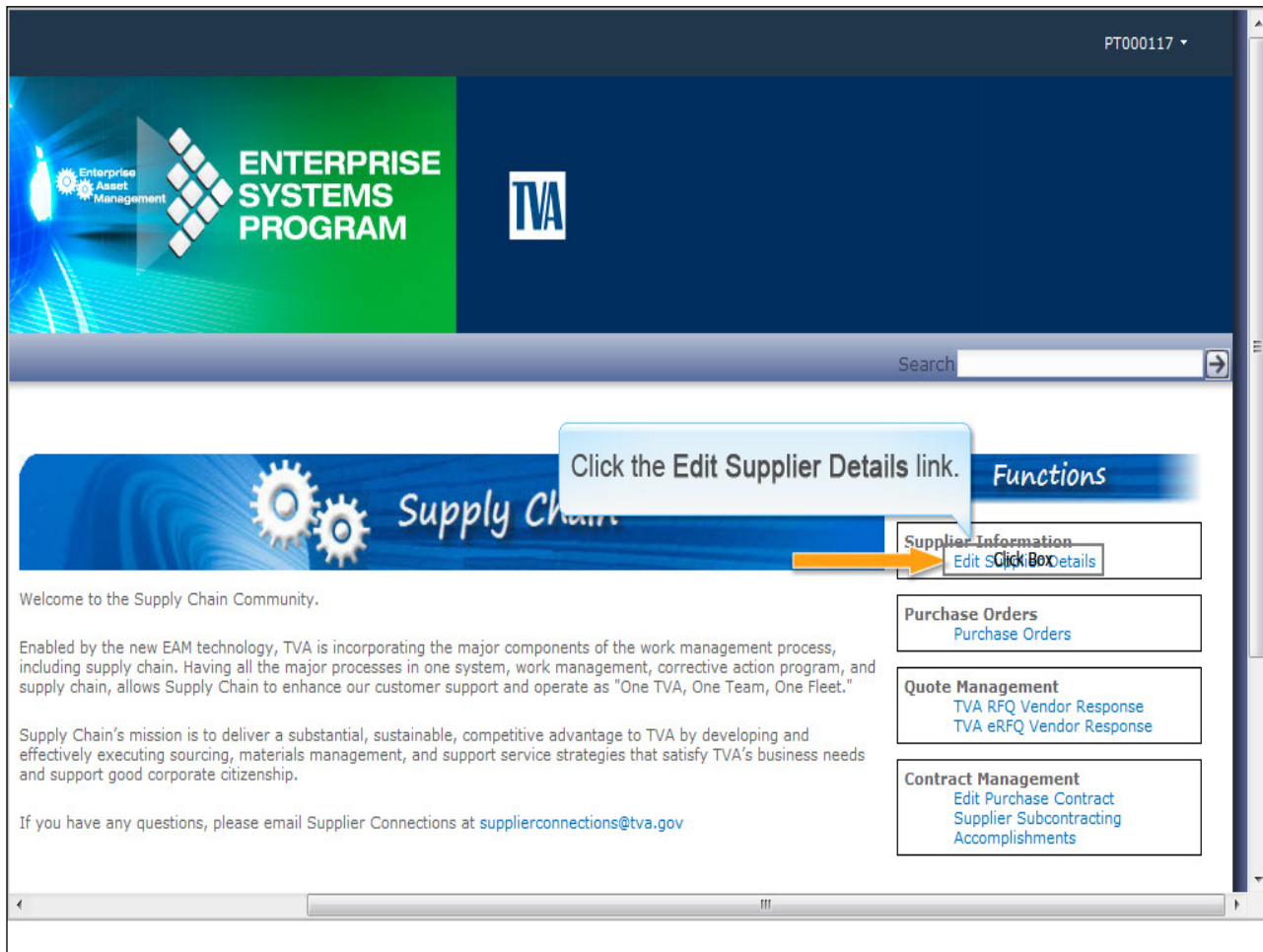
Contains detailed information about TVA vendors.

Can be used to update information, as needed.

Displays only company records tied to the user's login.

We will work with the fictional XYZ Inc. record.

Slide 20 - Accessing the Application



Slide notes

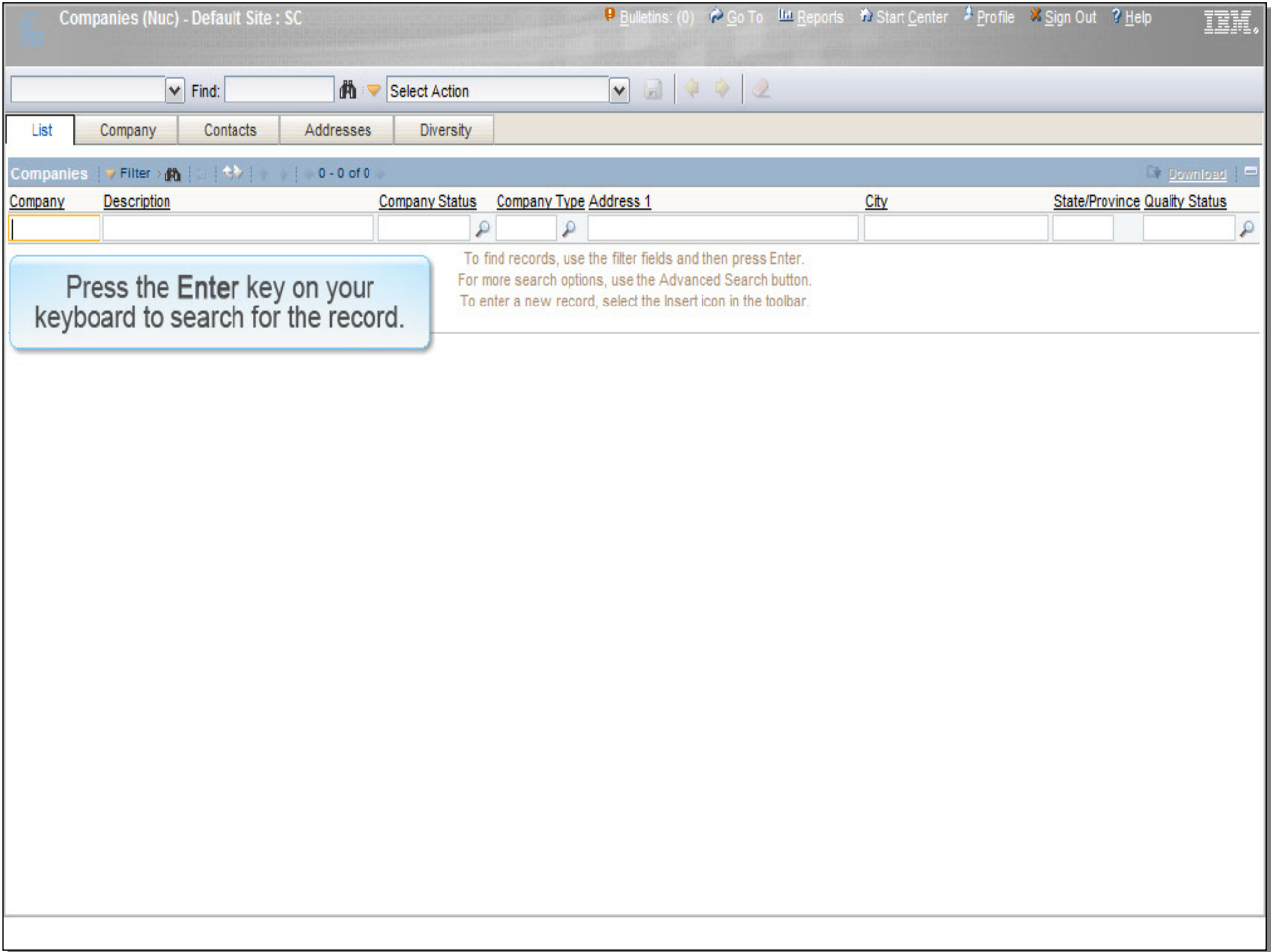
We'll begin from the Supply Chain portal, where we've scrolled to the right side of the home page.

You can access the Companies application by clicking THIS link. Go ahead and click the link.

Text Captions

Click the **Edit Supplier Details** link.

Slide 21 - Viewing the Company Record



Slide notes

The List tab of the application is now displayed. The fields in this tab are used to search for records based on various criteria. However, the easiest way to search for your company's records is by pressing Enter in the Company field.

Press Enter now to search for the XYZ record.

Text Captions

Press the **Enter** key on your keyboard to search for the record.

Slide 22 - Viewing the Company Record

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToList ReportsStart CenterProfileSign OutHelpIBM

Find:Select Action

ListCompanyContactsAddressesDiversity

CompaniesFilter1 - 1 of 1Download

Company	Description	Company Status	Company Type	Address 1	City	State/Province	Quality Status
55555555-00	XYZ Inc.	ACTIVE	V	123 Industrial Way	Anywhere		GENERAL

Select Records

Click the 5555555555-00 link.

Slide notes

Maximo has located the record. If this company had more than one company record, they would also be displayed here.
Now click the Company number to open the record.

Text Captions

Click the **5555555555-00** link.

Slide 23 - Viewing the Company Record

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Parent>>

Customer #

Home Page

Doing Business As

Quality StatusGENERAL

Company TypeV

Company StatusACTIVE

Company ClassificationFEDA

FEDA Code

SRM Segmentation

AttachmentsView/AttachPrint

Click anywhere to continue.

Purchasing Details

1099 Required?☐

1099 Code

Expedited Vendor?☐

Tax ID

Freight Terms

FOB Point

Ship Via

Ship Type

Payment on Receipt?☐

Payment Details

Pay To

Payment Terms.15 % 13 DISC DAYS 30 NET DAYS

AP Control AccountX00001:D000000000:21118:0014M39

RBN AccountX00001:D000000000:21118:0014M39

Suspense AccountX00001:D000000000:21118:0014M39

Tool Control Account

Consignment Account

E-Commerce: EDI / Fax Information

E-commerce Supplier

Send PO EDI?☐

Send RFQ EDI?☐

Send Remittance Advice EDI?☐

E-Commerce: Other Information

Vendor Sends Invoice?☐

Send Remittance Advice FED?☐

Slide notes

The record is now displayed in the Company tab. This page contains general information, such as the name and payment details. Look this over and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 24 - Viewing the Company Record

Companies (Nuc) - Default Sit

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

IBM

Find:

Click the Contacts tab.

ListCompanyClick:BoxAddressesDiversity

Company555555555-0XYZ Inc.

Parent>>

Customer #

Home Page

Doing Business As

Quality StatusGENERAL

Company TypeV

Company StatusACTIVE

Company ClassificationFEDA

FEDA Code

SRM Segmentation

AttachmentsView/AttachPrint

Purchasing DetailsPayment Details

1099 Required?☐

1099 Code

Expedited Vendor?☐

Tax ID

Freight Terms

FOB Point

Ship Via

Ship Type

Payment on Receipt?☐

Pay To

Payment Terms.15 % 13 DISC DAYS 30 NET DAYS

AP Control AccountX00001:D000000000:21118:0014M39

RBNi AccountX00001:D000000000:21118:0014M39

Suspense AccountX00001:D000000000:21118:0014M39

Tool Control Account

Consignment Account

E-Commerce: EDI / Fax InformationE-Commerce: Other Information

E-commerce Supplier

Send PO EDI?☐

Send RFQ EDI?☐

Send Remittance Advice EDI?☐

Vendor Sends Invoice?☐

Send Remittance Advice FED?☐

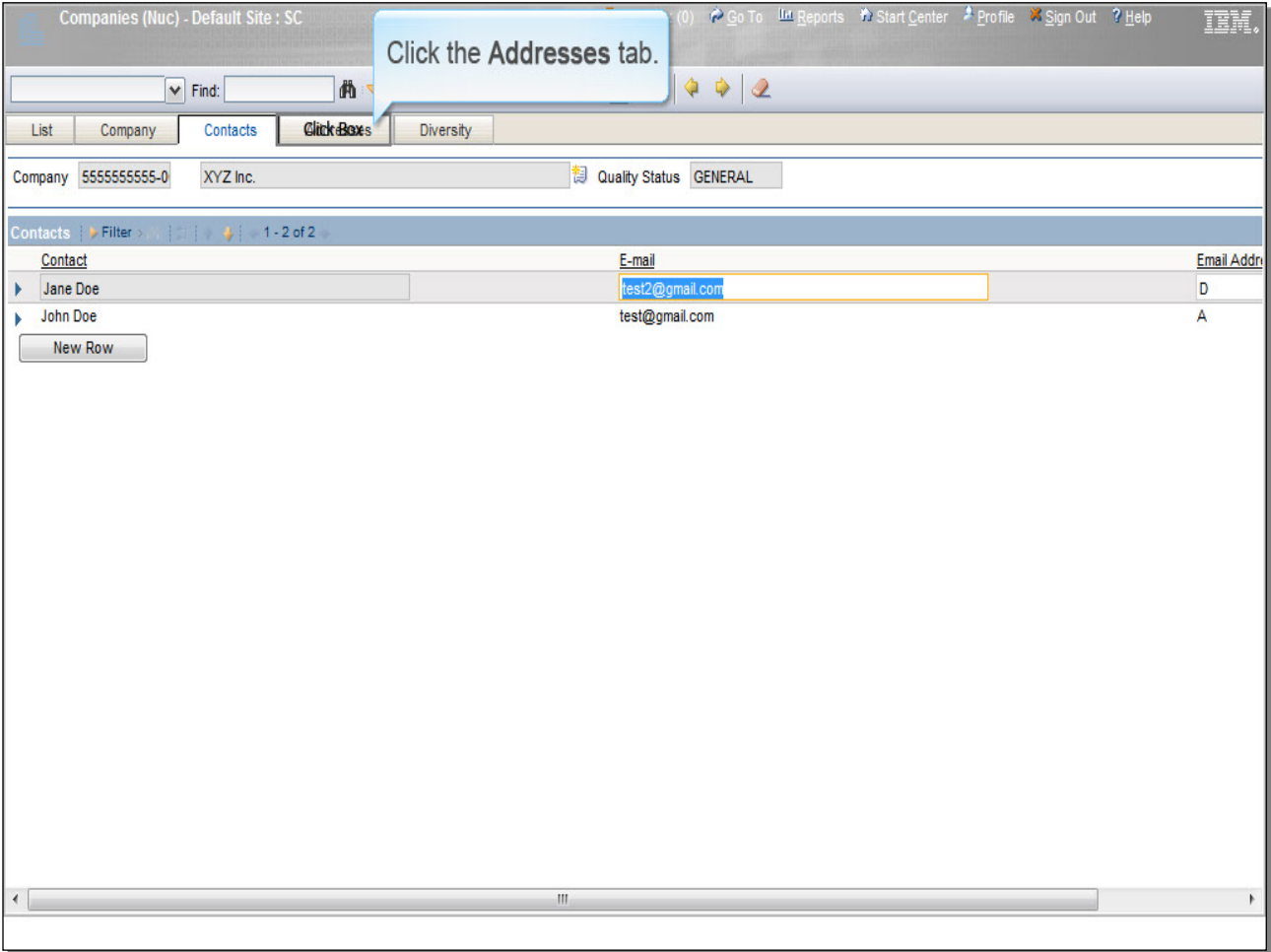
Slide notes

The other tabs contain additional information. Let's take a quick look.

Text Captions

Click the **Contacts** tab.

Slide 25 - Viewing the Company Record



Slide notes

Here you see the contacts for this company. We'll return to this tab later to update some of the information.
Now click the Addresses tab.

Text Captions

Click the **Addresses** tab.

Slide 26 - Viewing the Company Record

Companies (Nuc) - Default Site : SC

ReportsStart CenterProfileSign OutHelp

Find:Select Action

Click the Diversity tab.

ListCompanyContactsAddressesClick Box

Company5555555555-0XYZ Inc. Quality StatusGENERAL

General InformationRemit To Information

Customer ContactJohn Doe

Address 1123 Industrial Way

Address 2

Address 3

Address 4

CityAnywhere

County

State/Province

ZIP/Postal Code33334

CountryUS

Phone

Company Fax

Contact

Address 1

Address 2

Address 3

Address 4

City

State/Province

ZIP/Postal Code

Country

Work with your Contract Manager if an address change is required.

Slide notes

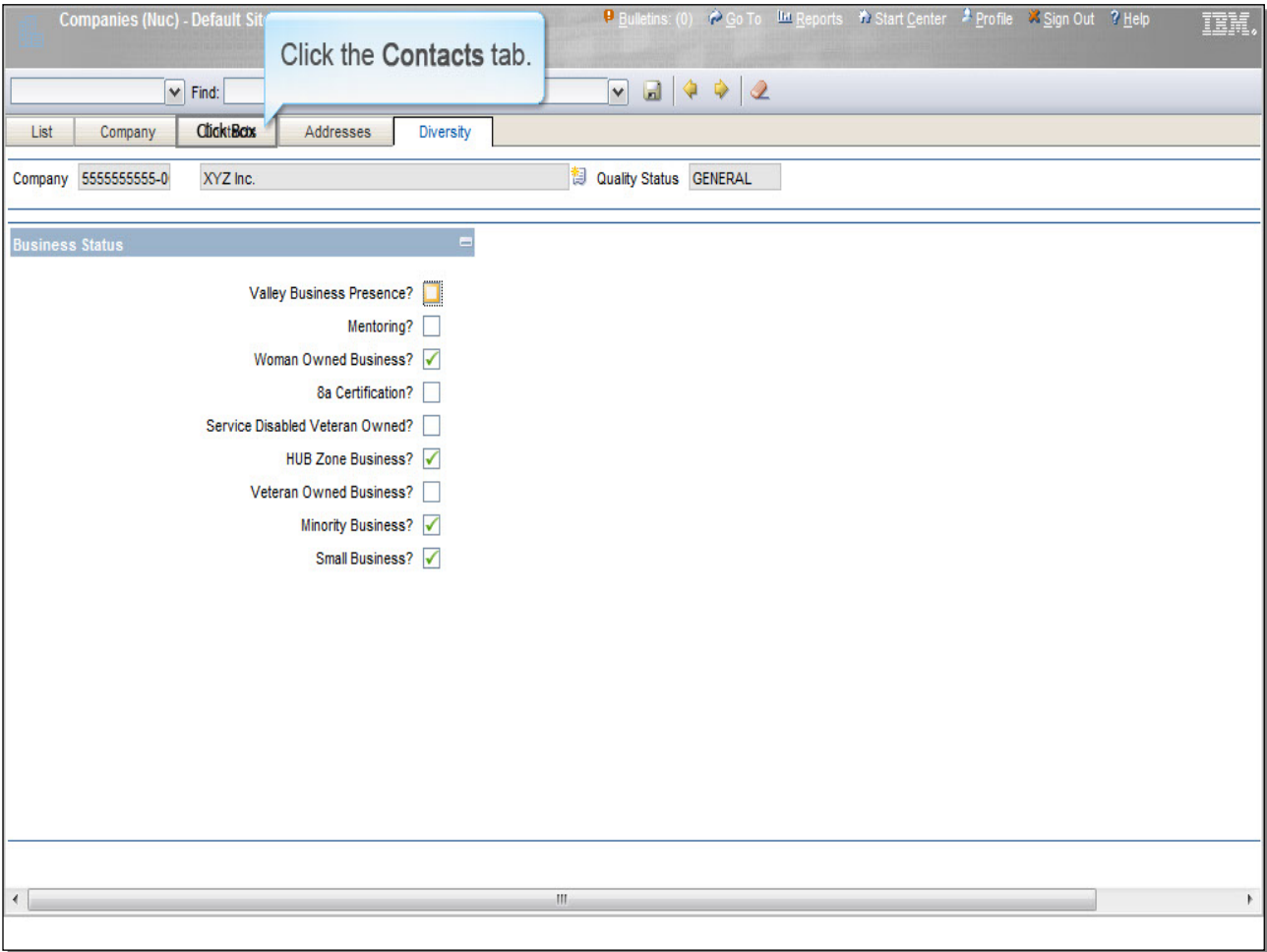
Although you can use this tab to update the company address, be sure to work with your Contract Manager if an address change is required. TVA will need to update address changes in related records.

Look this over, and then click the Diversity tab.

Text Captions

Click the **Diversity** tab.

Slide 27 - Viewing the Company Record



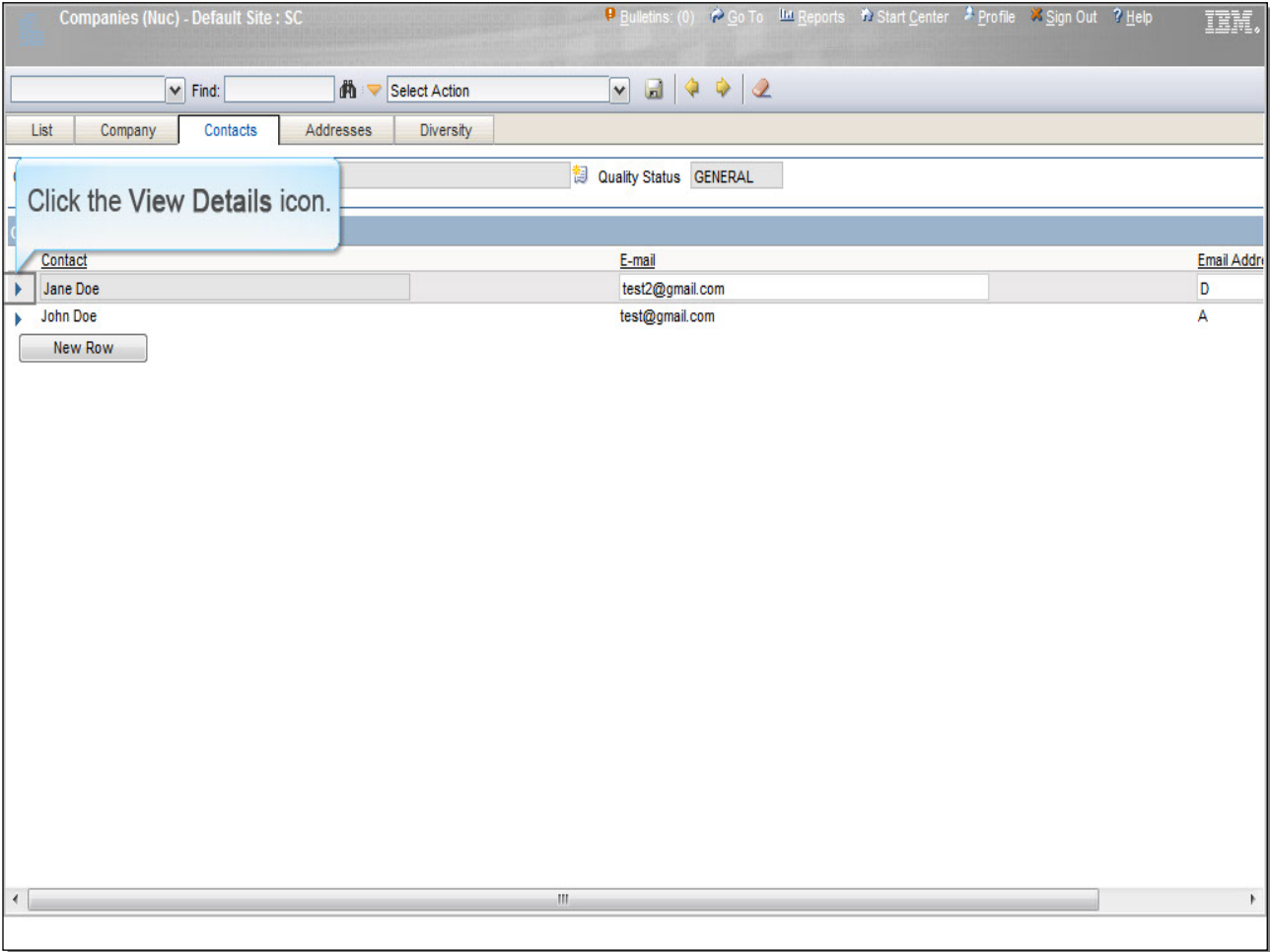
Slide notes

The Business Status can be updated as relevant.
Now let's return to the Contacts tab.

Text Captions

Click the **Contacts** tab.

Slide 28 - Editing the Record



Slide notes

We're going to update some of the information in the first contact. To view all of the fields, click the View Details icon to the left of the name.

Text Captions

Click the **View Details** icon.

Slide 29 - Editing the Record

Companies (Nuc) - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Company **Contacts** Addresses Diversity

Company 555555555-0 XYZ Inc. Quality Status GENERAL

Contacts Filter 1 - 2 of 2

Contact	E-mail
Jane Doe	test2@gmail.com
John Doe	test@gmail.com

Contact Information

Contact Jane Doe

Position * Sales

Phone * 555-555-1111

Fax

E-mail test2@gmail.com

Pager Phone

Home Phone

Information Related to Email

Email Address Status D

Email PO? ☐

Email PO Revision? ☐

Email Remittance Advice? ☐

Email Invoice Rejection? ☐

Last Updated By HMDMUQG2A

Last Updated 04/06/2015 3:05 P

New Row

Slide notes

You can edit any field that is not grayed out. Fields with an asterisk next to them are required.

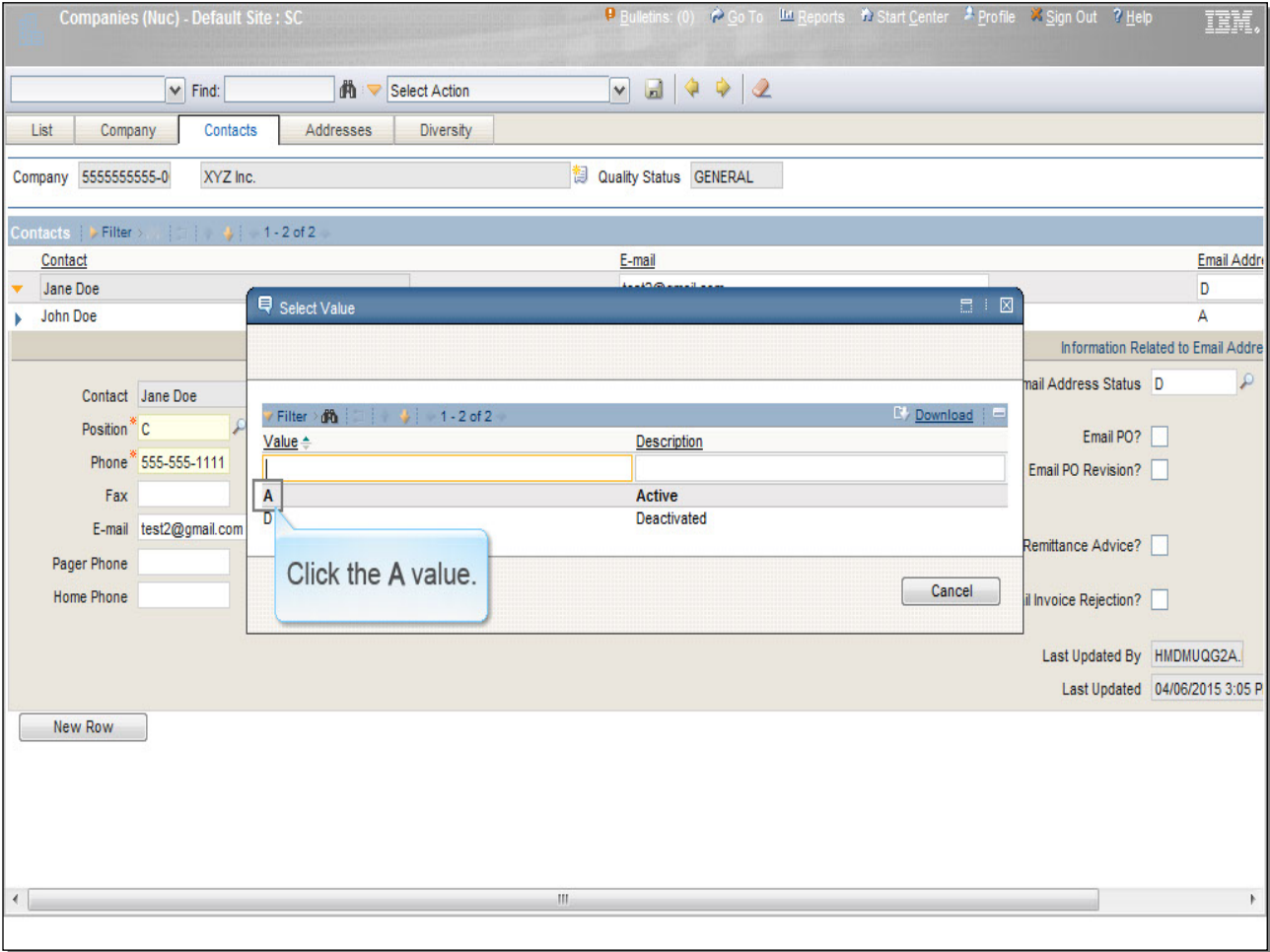
The Email Address Status field indicates whether this contact will receive THESE email messages from TVA. Currently, the status is D for Deactivated. Let's change this to Active, so that this person receives both of these messages.

Follow the instructions on the screen.

Text Captions

Click the **Select Value** icon.

Slide 30 - Editing the Record



Slide notes

Text Captions

Click the **A** value.

Slide 31 - Editing the Record

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company5555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 2 of 2

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A

Contact Information

ContactJane Doe

Position*CSales

Phone*555-555-1111

Fax

E-mailtest2@gmail.com

Pager Phone

Home Phone

Email PO?☐

Email PO Revision?☐

Email Remittance Advice?☐

Email Invoice Rejection?☐

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 3:05 P

New Row

Click the Email PO? check box.

Slide notes

Text Captions

Click the **Email PO?** check box.

Slide 32 - Editing the Record

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company5555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 2 of 2

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A

Contact Information

ContactJane Doe

Position*CSales

Phone*555-555-1111

Fax

E-mailtest2@gmail.com

Pager Phone

Home Phone

Email PO

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 3:05 P

New Row

Click the Email PO Revision? check box.

Slide notes

Text Captions

Click the **Email PO Revision?** check box.

Slide 33 - Editing the Record

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.Quality St

Click the Save Company icon.

ContactsFilter1 - 2 of 2

ContactE-mailEmail Address

Jane DoeJane DoeJane Doe

test2@gmail.comtest@gmail.comtest@gmail.com

A

Contact Information

Information Related to Email Address

ContactJane Doe

Position*CSales

Phone*555-555-1111

Fax

E-mailtest2@gmail.com

Pager Phone

Home Phone

Email Address Status

Email PO?☒

Email PO Revision?☒

Email Remittance Advice?☐

Email Invoice Rejection?☐

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 3:05 P

New Row

Slide notes

After you've finished making changes, your last step is to save the Company record.

Text Captions

Click the **Save Company** icon.

Slide 34 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

BMXAA42051 - Record has been saved.

Find:

Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 2 of 2

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A

Contact Information

Information Related to Email Address

ContactJane Doe

Position*CSales

Phone*555-555-1111

Fax

E-mailtest2@gmail.com

Pager Phone

Home Phone

Email Address Status

Email PO?☒

Email PO Revision?☒

Email Remittance Advice?☐

Email Invoice Rejection?☐

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

Click Box

Click the New Row button.

Slide notes

You can add more contacts to this list if needed. Let's add one now. Start by clicking the New Row button.

Text Captions

Click the **New Row** button.

Slide 35 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelpIBM

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test12@gmail.com	A
John Doe	test@gmail.com	A

Contact Information

Information Related to Email Address

Contact*Position*Phone*FaxE-mailPager PhoneHome Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes

As mentioned earlier, fields with an asterisk are required. For training purposes, we'll complete the first three fields, along with the email address.

Text Captions

Slide 36 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*

Phone*

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes
Text Captions

Slide 37 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company5555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*

Phone*

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes
Text Captions

Slide 38 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 7 of 7Download

Contact	Email Address
Jane Doe	A
John Doe	A

ValueDescription

A	Contract Administrator
B	Executive
C	Sales
D	Customer Service
E	Remittance Contact
F	QA Contact
G	Other

Cancel

Contact*Jay Roberts

Position*

Phone*

Fax

E-mail

Pager Phone

Home Phone

New Row

Information Related to Email Address

Email Address Status

Email PO?

Email PO Revision?

Remittance Advice?

Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

Slide notes
Text Captions

Slide 39 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*Sales

Phone*

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes
Text Captions

Slide 40 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*CSales

Phone*

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes

Text Captions

Slide 41 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test12@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*CSales

Phone*555-555-1212

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes
Text Captions

Slide 42 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*CSales

Phone*555-555-1212

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes

Text Captions

Slide 43 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test12@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*CSales

Phone*555-555-1212

Fax

E-mail

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes
Text Captions

Slide 44 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc.

Quality StatusGENERAL

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*CSales

Phone*555-555-1212

Fax

E-mailtest3@gmail.com

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes
Text Captions

Slide 45 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelpIBM

Find:Select Action

ListCompanyContactsAddressesDiversity

Company555555555-0XYZ Inc. Quality St

Click the Save Company icon.

ContactsFilter1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
Jay Roberts		

Contact Information

Information Related to Email Address

Contact*Jay Roberts

Position*CSales

Phone*555-555-1212

Fax

E-mailtest3@gmail.com

Pager Phone

Home Phone

Email Address Status

Email PO?

Email PO Revision?

Email Remittance Advice?

Email Invoice Rejection?

Last Updated ByHMDMUQG2A

Last Updated04/06/2015 4:59 P

New Row

Slide notes

Now save the Company record again.

Text Captions

Click the **Save Company** icon.

Slide 46 - Adding a Contact

Companies (Nuc) - Default Site : SC

Bulletins: (0)

Go To

Reports

Start Center

Profile

Sign Out

Help

BMXAA4205I - Record has been saved.

Find:

Select Action

List

Company

Contacts

Addresses

Diversity

Company

555555555-0

XYZ Inc.

Quality Status

GENERAL

Contacts

Filter

1 - 3 of 3

Contact	E-mail	Email Address
Jane Doe	test2@gmail.com	A
Jay Roberts	test3@gmail.com	
John Doe	test@gmail.com	A

Contact Information

Information Related to Email Address

Contact

Jane Doe

Position

C

Sales

Phone

555-555-1111

Fax

E-mail

test2@gmail.com

Pager Phone

Home Phone

Email Address Status

A

Email PO?

☒

Email PO Revision?

☒

Email Remittance Advice?

☐

Email Invoice Rejection?

☐

Last Updated By

HMDMUQG2A

Last Updated

04/06/2015 4:59 P

Click anywhere to continue.

New Row

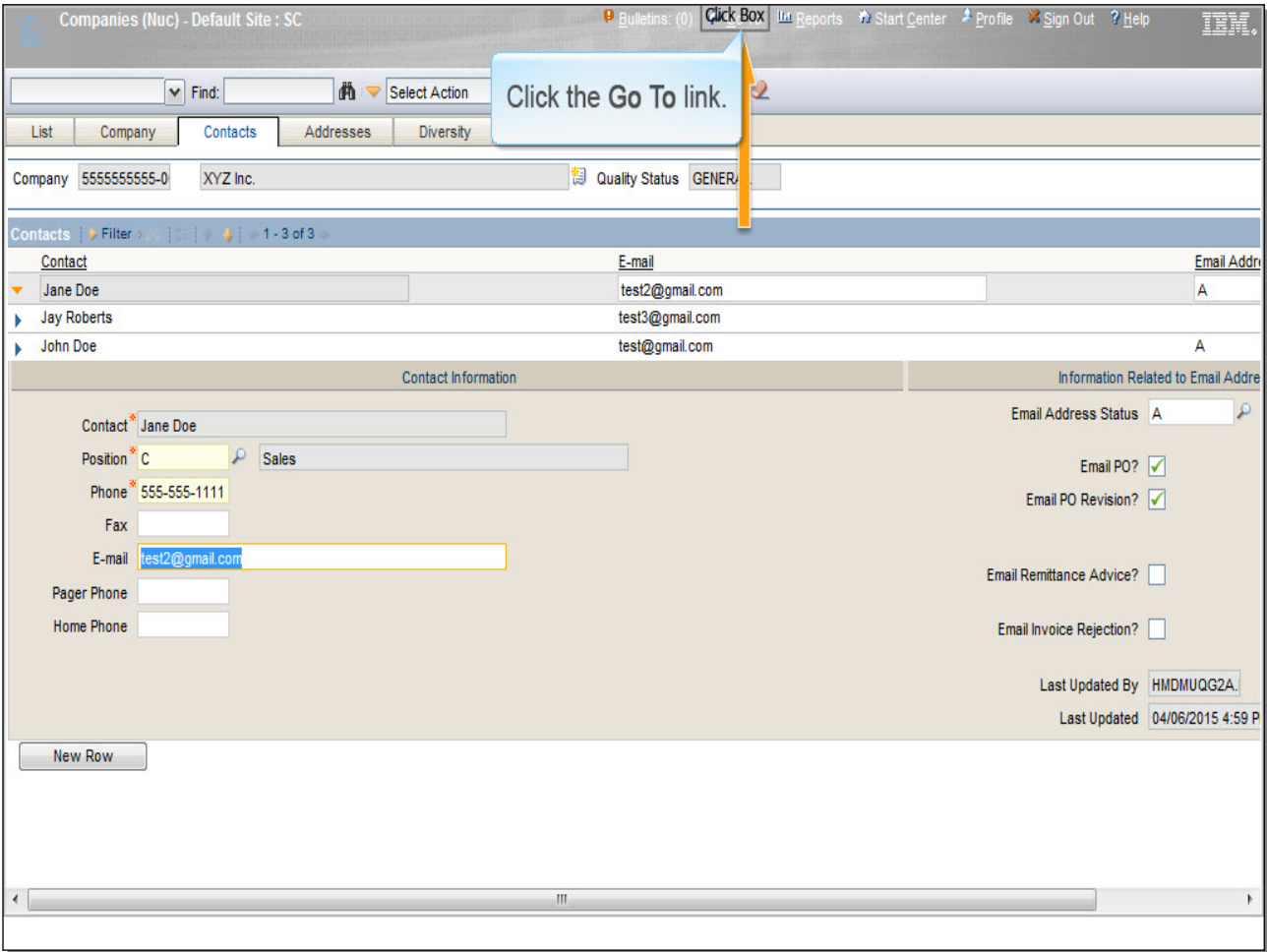
Slide notes

Maximo indicates HERE that the record has been saved. Look over the screen and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 47 - Navigating Using the Go To Menu



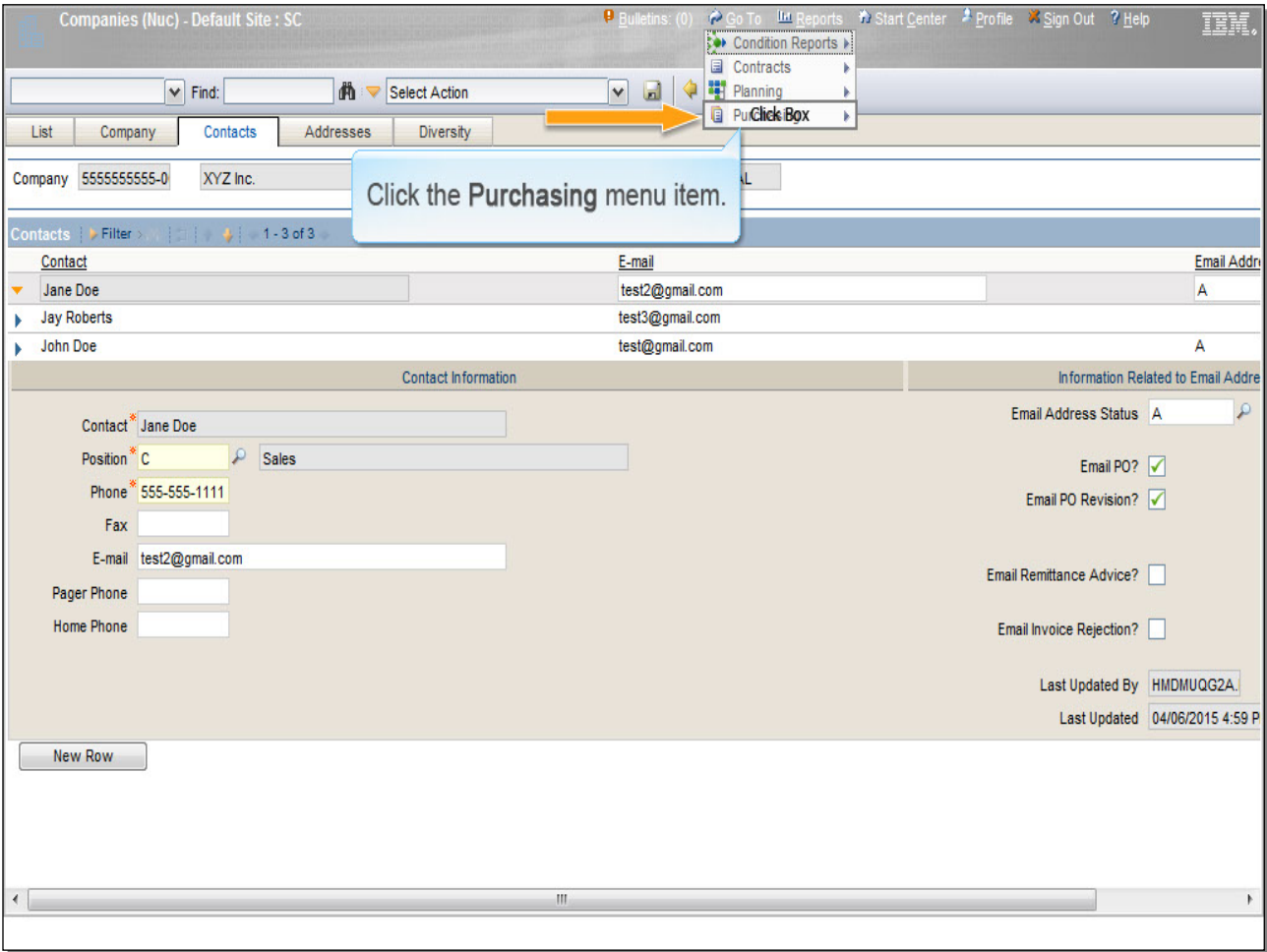
Slide notes

We've finished working with this application. You can navigate back to the Supply Chain portal using your browser's Back and Next buttons. If you want to access another application directly from here, you can use the Go To menu. Let's take a quick look.

Text Captions

Click the **Go To** link.

Slide 48 - Navigating Using the Go To Menu



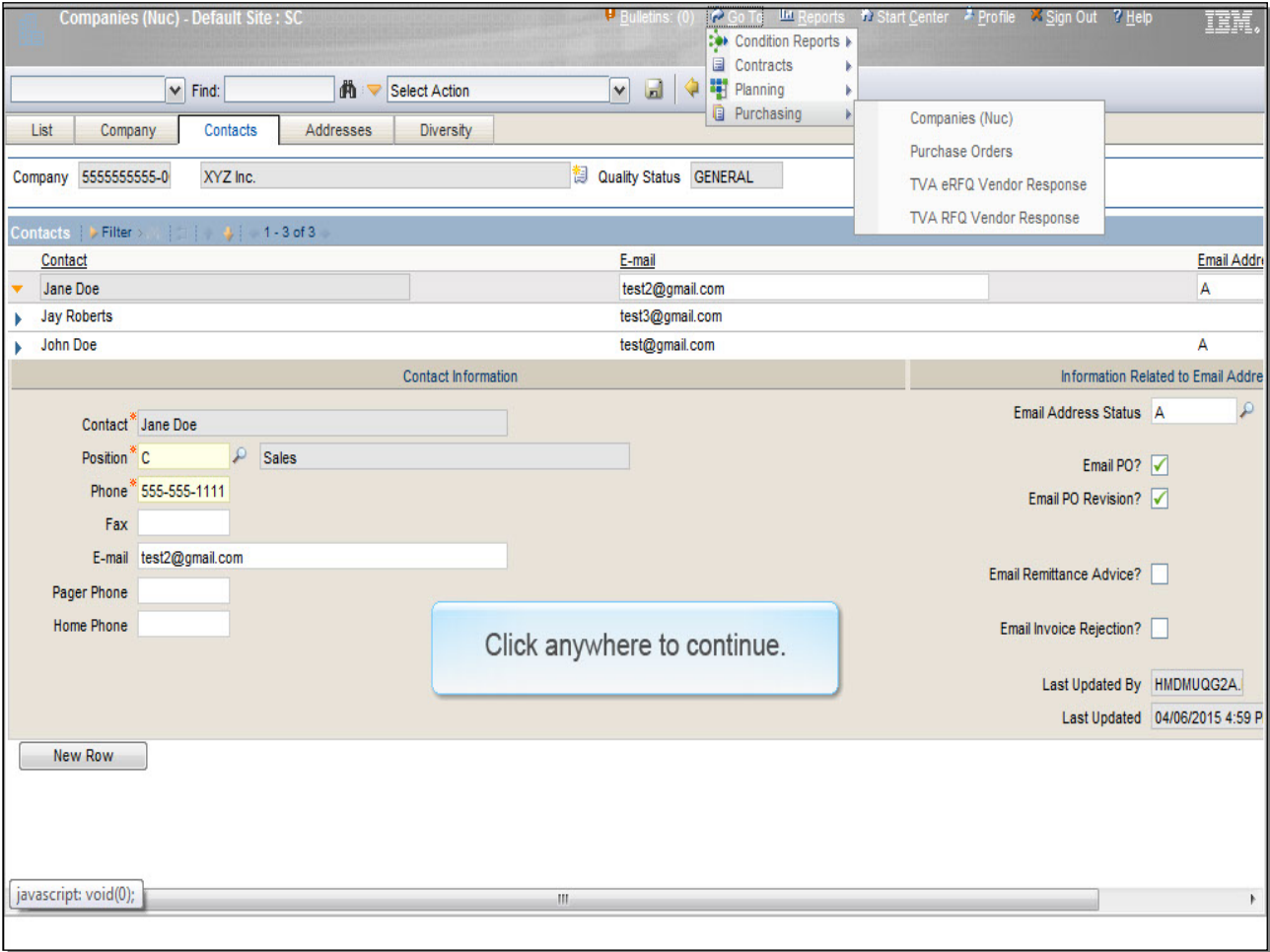
Slide notes

The applications that you are allowed to access are grouped into the categories you see here. For example, the Purchasing category contains the Companies application and others.

Text Captions

Click the **Purchasing** menu item.

Slide 49 - Navigating Using the Go To Menu



Slide notes

Here are the four applications related to purchasing. Although we won't use this menu in the course, keep in mind that it's an option when navigating among applications.

Text Captions

Click anywhere to continue.

Summary

Working with the Companies Application

Pressing Enter in the Company field in the List tab displays all of your company's records.

After selecting a record, you can use these tabs to update information:

- Company*
- Contacts*
- Addresses*
- Diversity*

The Go To menu enables you to access other supplier applications without returning to the portal.

Slide notes

This concludes the lesson. Take a moment to review the key points covered.

Text Captions

Summary

Working with the Companies Application

Pressing Enter in the Company field in the List tab displays all of your company's records.

After selecting a record, you can use these tabs to update information:

Company

Contacts

Addresses

Diversity

The Go To menu enables you to access other supplier applications without returning to the portal.

Submitting a Request for Quotation (RFQ/eRFQ) Response



Overview

Submitting an Open RFQ Response

Submitting a Targeted eRFQ Response

Slide notes

In this lesson, you will learn how to use Maximo to submit responses to both Open RFQs and Targeted eRFQs.

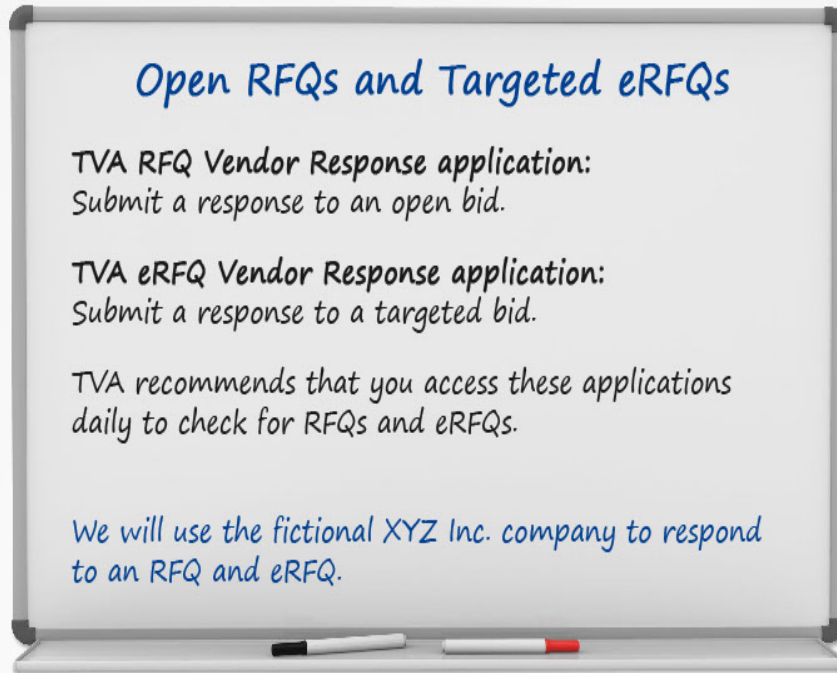
Text Captions

Overview

Submitting an Open RFQ Response

Submitting a Targeted eRFQ Response

Overview



Slide notes

Depending on the type of bid you are responding to, you will use one of two applications in Maximo. The TVA RFQ Vendor Response application is used to submit a response to an open bid. To respond to a targeted bid, you use the TVA eRFQ application.

Although notifications are sent to companies for open RFQs, TVA recommends that you access these applications daily to check the availability of both RFQs and targeted eRFQs.

For training purposes, we'll use the fictional XYZ company to respond to both an RFQ and eRFQ.

Text Captions

Overview

Open RFQs and Targeted eRFQs

*TVA RFQ Vendor Response application:
Submit a response to an open bid.*

TVA eRFQ Vendor Response application:

Submit a response to a targeted bid.

TVA recommends that you access these applications daily to check for RFQs and eRFQs.

We will use the fictional XYZ Inc. company to respond to an RFQ and eRFQ.

Slide 53 - Submitting an Open RFQ Response



Slide notes

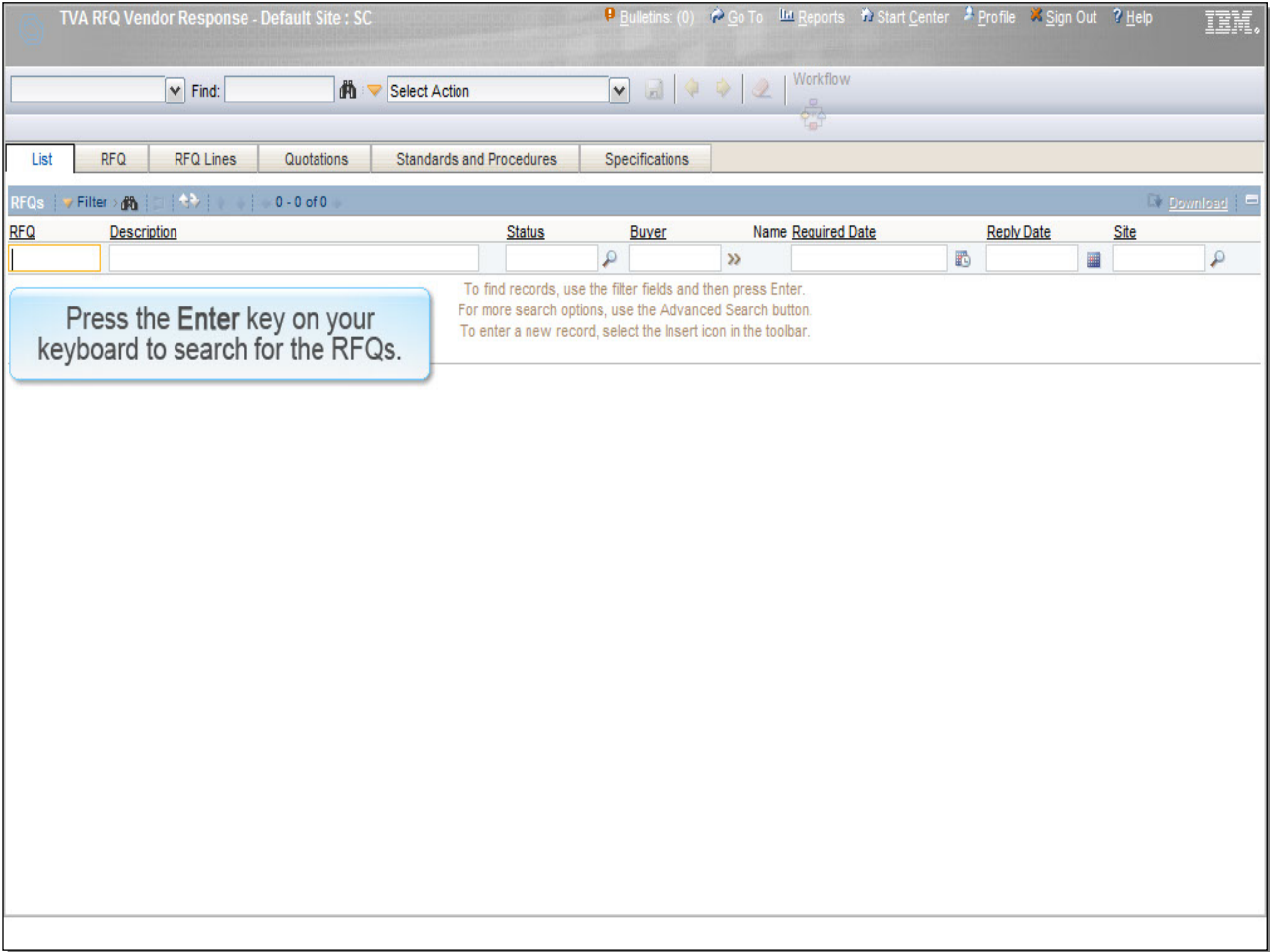
We'll begin from the Supplier portal, where we've scrolled to the right side of the home page. Both applications are located in the Quote Management section.

Let's start by responding to an open RFQ.

Text Captions

Click the **TVA RFQ Vendor Response** link.

Slide 54 - Submitting an Open RFQ Response



Slide notes

The application is now open with the List tab displayed. This tab is used to search for and retrieve open RFQs for which your company is eligible. Moving the insertion point into any field and pressing Enter retrieves the RFQs. But before doing this, make sure that the search fields do not contain any pre-populated values. If they do, clear the fields before pressing Enter. In this example, all the fields are clear.

Text Captions

Press the **Enter** key on your keyboard to search for the RFQs.

Slide 55 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site: SC

Bulletins: (0)

Go To

Reports

Start Center

Profile

Sign Out

Help

Find: Select Action Workflow

ListRFQRFQ LinesQuotationStandards and ProceduresSpecifications

RFQsFilter1 - 20 of 211

RFQ	Description	Status	Buyer	Name	Required Date	Reply Date	Site
1000007	PR 740736	OPEN	I203FBCQA	Andrews, James Ashton			CUF
1000018	Generated by Reorder 12/18/12 10:11 AM.	OPEN	OJP0P7K60	Neal, Josh B			CLS
1000046	Wolseley	OPEN	P6U83032H	Roberts, Lance Taylor			PAF
1000077	RFQ 1000077 PR 741936, 741502	OPEN	Y40KEKPLE	Cantrell, Nelson Cody			CUF
1000082	PR 742054 Cumberland	OPEN	I203FBCQA	Andrews, James Ashton			CUF
1000336	TVA SHAWNEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
1000531		OPEN	C9PK0028Q	Triplett, Brian Keith			PAF
1000599	Non-Stock Demand - Generated by Reorder 12/21/12 12:56 PM.	OPEN	OJP0P7K60	Neal, Josh B			CT
1000642	TVA SHAWNEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
1000666	Generated by Reorder 1/3/13 10:12 AM.	OPEN	OJP0P7K60	Neal, Josh B			CLS
1000693	Generated by Reorder 1/3/13 12:40 PM.	OPEN	OJP0P7K60	Neal, Josh B			SC
1000771	Generated by Reorder 1/3/13 8:32 AM.	OPEN	7T57E0IFS	Smith, Timothy Mark			KIF
1000780	TVA SHAWNEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
1000923	RFQ 1000923 PR 739305, 745455	OPEN	Y40KEKPLE	Cantrell, Nelson Cody			BRF
1001055	TVA SHAWNEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
1001055		OPEN	OJP0P7K60	Neal, Josh B			SC
1001055		OPEN	OJP0P7K60	Neal, Josh B			CT
1001055		OPEN	7T57E0IFS	Smith, Timothy Mark			KIF
1001055	TVA SHAWNEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
1001055	Purchasing Parts for WBN Trucks	OPEN	UNIFEN6CW	Tilley, Zachary Eugene			GC

Select Records

Click RFQ number 1052223.

Slide notes

Here you see all of the open RFQs, as indicated in the Status column. The total number is indicated HERE. To view additional pages of RFQs, you can click the Next Page icon.

Clicking the RFQ number opens it in the RFQ tab, where you can view details.

Text Captions

Click RFQ number 1052223.

Slide 56 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site - SC

Click the RFQ Lines tab.

Workflow

List RFQ Click Boxes Quotations Standards and Procedures Specifications

RFQ 1052223 Purchasing Parts for WBN Trucks Site GC Status OPEN Attachments View/Att

Details		Dates		Terms	
Buyer	UNIFEN6CW Tilley, Zachary Eugene	Required Date	04/13/2015	Freight Terms	
Priority	0	Reply Date		Ship Via	
Type		Status Date	04/06/2015 4:17 PM	Ship Type	
Vendor Reference				Payment Terms	0 % 0 DISC DAYS 45 NET DAYS
				FOB Point	

Ship To		Reply To	
Ship To	SEEINS SEE PO INSTRUCTIONS	Reply To	
Address	SEE PO INSTRUCTIONS	Address	
City		City	
State/Province		State/Province	
ZIP/Postal Code		ZIP/Postal Code	
Attention		Attention	

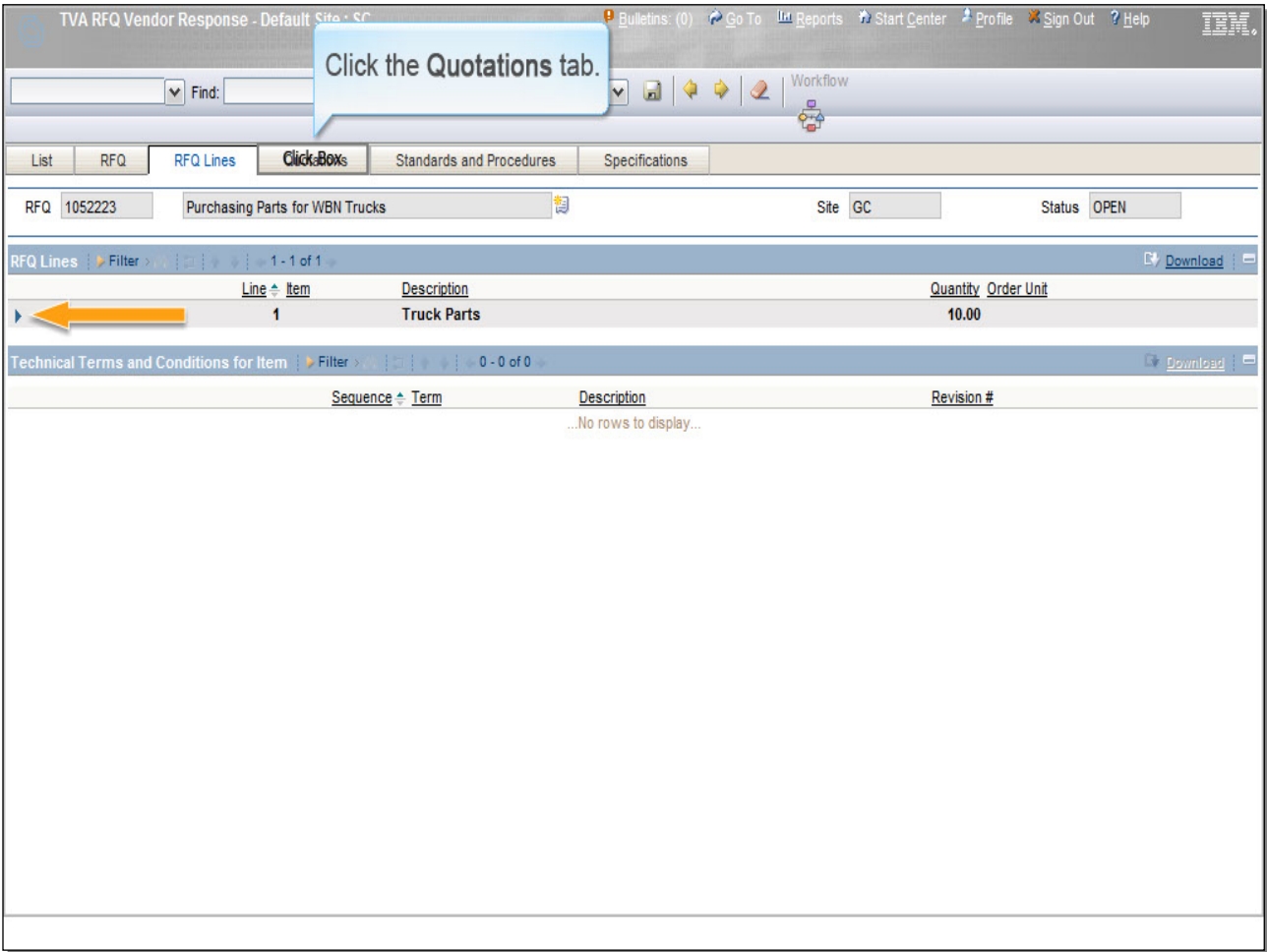
Slide notes

General information about the RFQ is displayed, including a description, HERE. The Required Date field indicates the date that bids are due. To view the individual lines comprising the RFQ, click the RFQ Lines tab.

Text Captions

Click the **RFQ Lines** tab.

Slide 57 - Submitting an Open RFQ Response



Slide notes

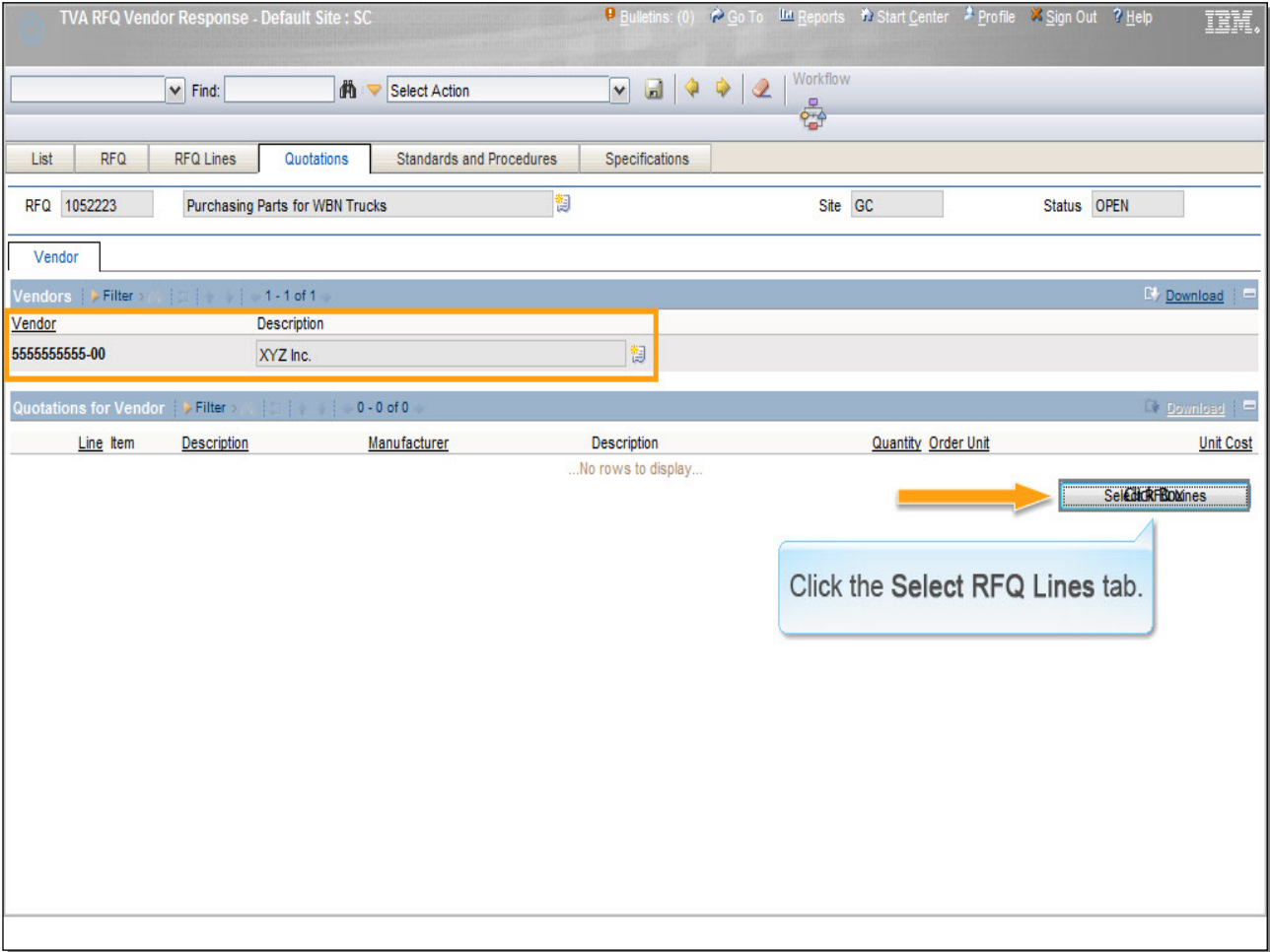
Now you can review the line items requested and decide whether to respond. If you want to view more information about a line, you can click the View Details icon to the left of a line.

For this example, let's go ahead and enter a quote using the Quotations tab.

Text Captions

Click the **Quotations** tab.

Slide 58 - Submitting an Open RFQ Response



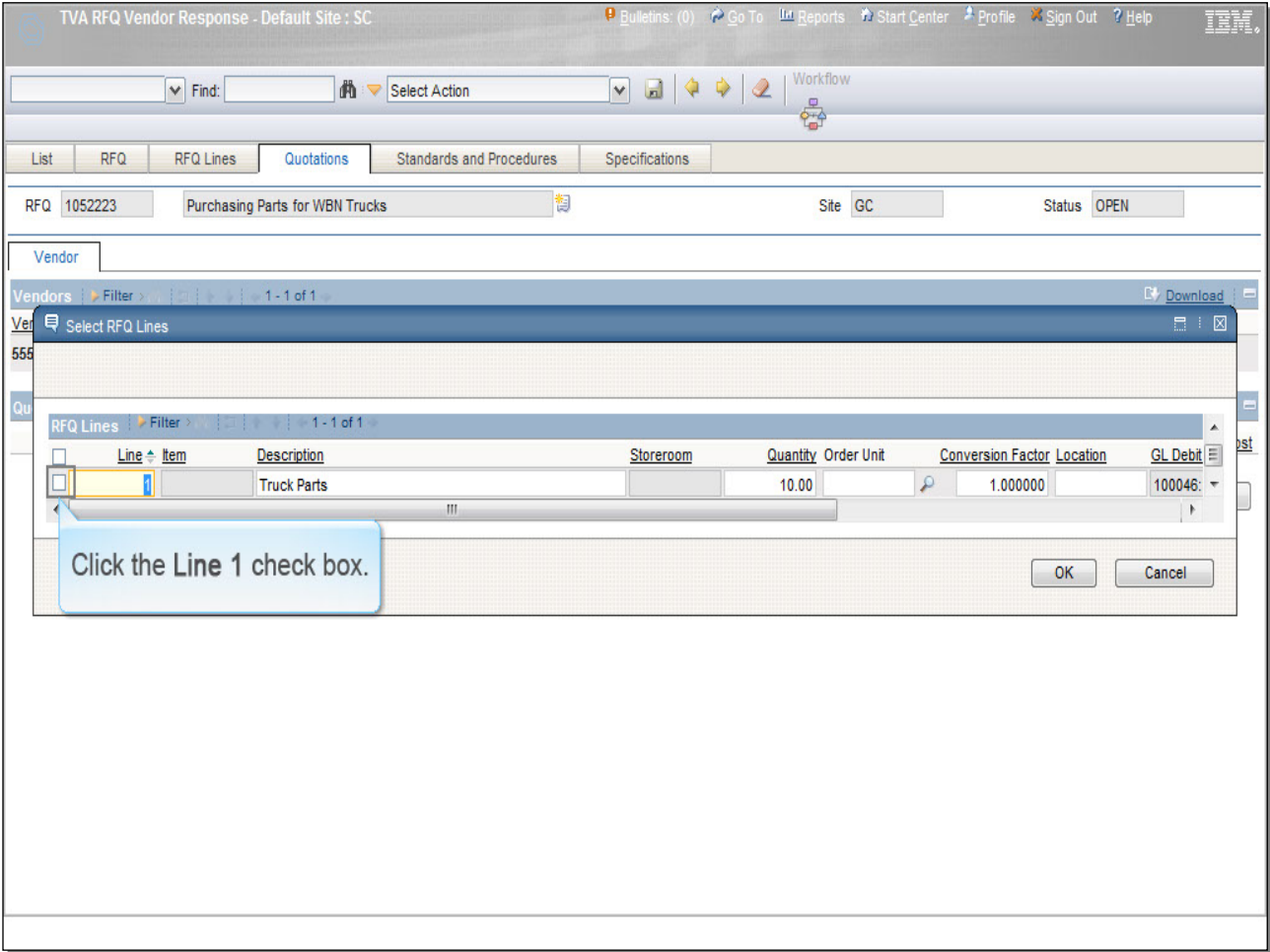
Slide notes

The current company's vendor information is listed at the top. Clicking THIS button lets you view and select the specific lines you want to respond to. Follow the instructions to do this.

Text Captions

Click the **Select RFQ Lines** tab.

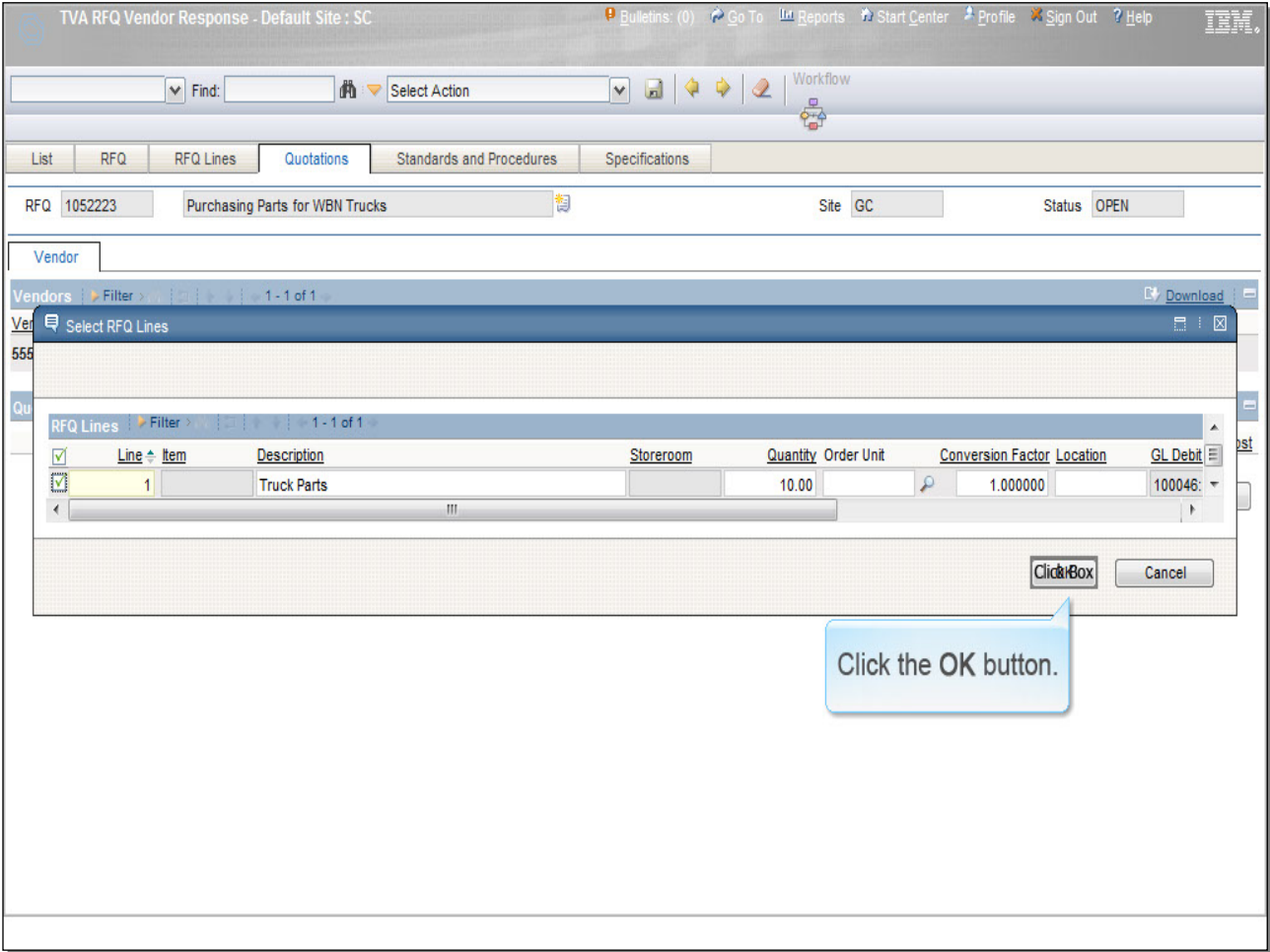
Slide 59 - Submitting an Open RFQ Response



Slide notes
Text Captions

Click the **Line 1** check box.

Slide 60 - Submitting an Open RFQ Response



Slide notes
Text Captions

Click the **OK** button.

Slide 61 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelpIBM

Find:

Select Action

Workflow

List

RFQ

RFQ Lines

Quotations

Standards and Procedures

Specifications

RFQ

1052223

Purchasing Parts for WBN Trucks

Site

GC

Status

OPEN

Vendor

Vendors

Filter

1 - 1 of 1

Download

Vendor

Description

555555555-00

XYZ Inc.

Quotations for Vendor 555555555-00

Filter

1 - 1 of 1

Download

Line Item

Description

Manufacturer

Description

Quantity

Order Unit

Unit Cost

1

Truck Parts

10.00

View Details

Select RFQ Lines

Click the View Details icon.

Slide notes

Now click the View Details icon to the left of the line to display the fields.

Text Captions

Click the **View Details** icon.

Slide 62 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN TrucksSiteGCStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

Vendor	Description
5555555555-00	XYZ Inc.

Quotations for Vendor 5555555555-00Filter1 - 1 of 1Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1	Truck Parts				10.00		

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

ManufacturerMfg Part NumberStock CategoryCatalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost

Line Cost0.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date

Select RFQ Lines

Slide notes

The next step is to enter your quote using the fields that are not grayed out. The Remarks field is optional, and can be helpful if you have additional information. Watch the demonstration as we complete the Unit Cost and Delivery Date fields.

Text Captions

Slide 63 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN TrucksSiteGCStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

Vendor	Description
5555555555-00	XYZ Inc.

Quotations for Vendor 5555555555-00Filter1 - 1 of 1Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost

Line Cost0.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date

Select RFQ Lines

Slide notes

Text Captions

Slide 64 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN TrucksSiteGCStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

Vendor	Description
5555555555-00	XYZ Inc.

Quotations for Vendor 5555555555-00Filter1 - 1 of 1Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost150

Line Cost0.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date

Select RFQ Lines

Slide notes

Text Captions

Slide 65 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN TrucksSiteGCStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

Vendor	Description
5555555555-00	XYZ Inc.

Quotations for Vendor 5555555555-00Filter1 - 1 of 1Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost150

Line Cost0.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date

Select RFQ Lines

Slide notes
Text Captions

Slide 66 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN TrucksSiteGCStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

Vendor	Description
555555555-00	XYZ Inc.

Quotations for Vendor 555555555-00Filter1 - 1 of 1Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		150.000000

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Quantity10.00

Order Unit

Unit Cost150.000000

Line Cost1,500.00

Quote Start Date

Quote End Date

Required Date201420152016

Delivery Date

Select RFQ Lines

Slide notes
Text Captions

Slide 67 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN TrucksSiteGCStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

VendorDescription

555555555-00XYZ Inc.

Quotations for Vendor 555555555-00Filter1 - 1 of 1Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		150.000000

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost150.000000

Line Cost1,500.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date04/20/2015

Select RFQ Lines

Slide notes

As you can see, Maximo has calculated the Line Cost based on the Unit Cost just entered.
Look over this information and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 68 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

Click the Save RFQ icon.

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecific

RFQ1052223Purchasing Parts for WBN TrucksStatusOPEN

Vendor

VendorsFilter1 - 1 of 1Download

Vendor	Description
555555555-00	XYZ Inc.

Quotations for Vendor 555555555-00Filter1 - 1 of 1Download

Line Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1	Truck Parts			10.00		150.000000

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost150.000000

Line Cost1,500.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date04/20/2015

Select RFQ Lines

Slide notes

If you were responding to multiple lines, you would repeat this process for the other lines. In this example, there is just one line in the RFQ. After you've finished, you need to save the RFQ and then submit it. Follow the instructions to do this.

Text Captions

Click the **Save RFQ** icon.

Slide 69 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

BMXAA4205I - Record has been saved.

Find:Select ActionWorkflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ1052223Purchasing Parts for WBN Trucks

Vendor

VendorsFilter1 - 1 of 1Download

VendorDescription555555555-00XYZ Inc.

Quotations for Vendor 555555555-00Filter1 - 1 of 1Download

Line Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1	Truck Parts			10.00		150.000000

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost150.000000

Line Cost1,500.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date04/20/2015

Select RFQ Lines

Click the Route Workflow icon.

Slide notes

Text Captions

Click the **Route Workflow** icon.

Slide 70 - Submitting an Open RFQ Response

The screenshot shows the 'TVA RFQ Vendor Response - Default Site : SC' interface. The top navigation bar includes links for Bulletins, Go To, Reports, Start Center, Profile, Sign Out, and Help. The main header displays 'BMXAA4411I - Process RFQPROCESS started.' Below this is a search bar and a 'Select Action' dropdown. The main content area is divided into tabs: List, RFQ, RFQ Lines, Quotations, Standards and Procedures, and Specifications. The 'Quotations' tab is active, showing a table with columns for Vendor, Description, and Unit Cost. A 'Manual Input' dialog box is open, prompting the user to confirm the bid. The dialog box has a 'Bid' radio button selected and a 'Memo' field. A blue callout bubble points to the 'OK' button in the dialog box, stating 'Click the OK button.' The background interface shows a table with columns for Line Item, Description, and Unit Cost. The 'Quantity and Costs' section is visible at the bottom, showing fields for Quantity, Order Unit, Unit Cost, and Line Cost.

Vendor	Description	Unit Cost
555555555-00	XYZ Inc.	

Line Item	Description	Unit Cost
1	Truck Parts	150.000000

Quantity	Unit Cost	Line Cost
10.00	150.000000	1,500.00

Slide notes

Maximo is prompting you to confirm that you want to submit the bid. If you want to submit a No Bid, it's a good practice to include an explanation in the Memo field.

Go ahead and click OK to confirm the bid.

Text Captions

Click the **OK** button.

Slide 71 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC

BMXAA4412I - Process RFQPROCESS stopped.

Find: Select Action Workflow

ListRFQRFQ LinesQuotationsStandards and ProceduresSpecifications

RFQ 1052223Purchasing Parts for WBN Trucks

Vendor

Vendors Filter 1 - 1 of 1

VendorDescription

555555555-00XYZ Inc.

Quotations for Vendor 555555555-00 Filter 1 - 1 of 1Download

Line Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1	Truck Parts			10.00		150.000000

Line Item

Line1

Line TypeMATERIAL

ItemTruck Parts

Remarks

Stock Category

Catalog #

Quantity and Costs

Details

Quantity10.00

Order Unit

Unit Cost150.000000

Line Cost1,500.00

Quote Start Date

Quote End Date

Required Date04/30/2015

Delivery Date04/20/2015

Select RFQ Lines

Recommendation: Send an email message to your TVA Buyer stating that you have submitted a bid.

Click anywhere to continue.

Slide notes

The bid has been routed to the Buyer, where it will be reviewed.

Although not necessary, we encourage you to send an email to your TVA Buyer stating that you have submitted a bid.

Text Captions

Click anywhere to continue.

Slide 72 - Submitting a Targeted eRFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)Click Box

Reports

Start Center

Profile

Sign Out

Help

IBM

BMXAAA4417L - Process RFQPROCESS - pped.

Find:

Select Action

Click the Go To link.

Workflow

List

RFQ

RFQ Lines

Quotations

Standards and Procedures

Specifications

RFQ

1052223

Purchasing Parts for WBN Trucks

Site

GC

Status

OPEN

Vendor

Vendors

Filter

1 - 1 of 1

Download

Vendor

Description

555555555-00

XYZ Inc.

Quotations for Vendor 555555555-00

Filter

1 - 1 of 1

Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		150.000000

Line Item

Line

1

Line Type

MATERIAL

Item

Truck Parts

Remarks

Manufacturer

Mfg Part Number

Stock Category

Catalog #

Quantity and Costs

Details

Quantity

10.00

Quote Start Date

Quote End Date

Unit Cost

150.000000

Required Date

04/30/2015

Line Cost

1,500.00

Delivery Date

04/20/2015

Select RFQ Lines

Slide notes

Now let's take a quick look at the process for submitting a targeted eRFQ. In this example, the company already has the contract for the eRFQ.

Recall that you can access the TVA eRFQ Vendor Response application from the Supplier portal home page. You can also access it directly from here using the Go To menu. Let's use that method.

Text Captions

Click the **Go To** link.

Slide 73 - Submitting a Targeted eRFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)

Go To

Reports

Start Center

Profile

Sign Out

Help

IBM

Find:

Select Action

Condition Reports

Contracts

Planning

Purchasing

List

RFQ

RFQ Lines

Quotations

RFQ

1052223

Purchasing Parts for WBN T

Site

GC

Status

OPEN

Vendor

Vendors

Filter

1 - 1 of 1

Download

Vendor

Description

555555555-00

XYZ Inc.

Quotations for Vendor 555555555-00

Filter

1 - 1 of 1

Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		150.000000

Line Item

Line

1

Manufacturer

Line Type

MATERIAL

Mfg Part Number

Item

Truck Parts

Stock Category

Remarks

Catalog #

Quantity and Costs

Details

Quantity

10.00

Quote Start Date

Order Unit

Quote End Date

Unit Cost

150.000000

Required Date

04/30/2015

Line Cost

1,500.00

Delivery Date

04/20/2015

Select RFQ Lines

Click the Purchasing menu item.

Slide notes

Text Captions

Click the **Purchasing** menu item.

Slide 74 - Submitting a Targeted eRFQ Response

TVA RFQ Vendor Response - Default Site : SC

Bulletins: (0)

Go To

Reports

Start Center

Profile

Sign Out

Help

Condition Reports

Contracts

Planning

Purchasing

Companies (Nuc)

Purchase Orders

TVA eRFQ Vendor Response

TVA RFQ Vendor Response

Find:

Select Action

List

RFQ

RFQ Lines

Quotations

Standards and Procedures

Specifications

RFQ

1052223

Purchasing Parts for WBN Trucks

Site

PEN

Vendor

Click the TVA eRFQ Vendor Response menu item.

Vendors

Filter

1 - 1 of 1

Download

Vendor

Description

555555555-00

XYZ Inc.

Quotations for Vendor 555555555-00

Filter

1 - 1 of 1

Download

Line	Item	Description	Manufacturer	Description	Quantity	Order Unit	Unit Cost
1		Truck Parts			10.00		150.000000

Line Item

Line

1

Manufacturer

Line Type

MATERIAL

Mfg Part Number

Item

Truck Parts

Stock Category

Remarks

Catalog #

Quantity and Costs

Details

Quantity

10.00

Quote Start Date

Order Unit

Quote End Date

Unit Cost

150.000000

Required Date

04/30/2015

Line Cost

1,500.00

Delivery Date

04/20/2015

Select RFQ Lines

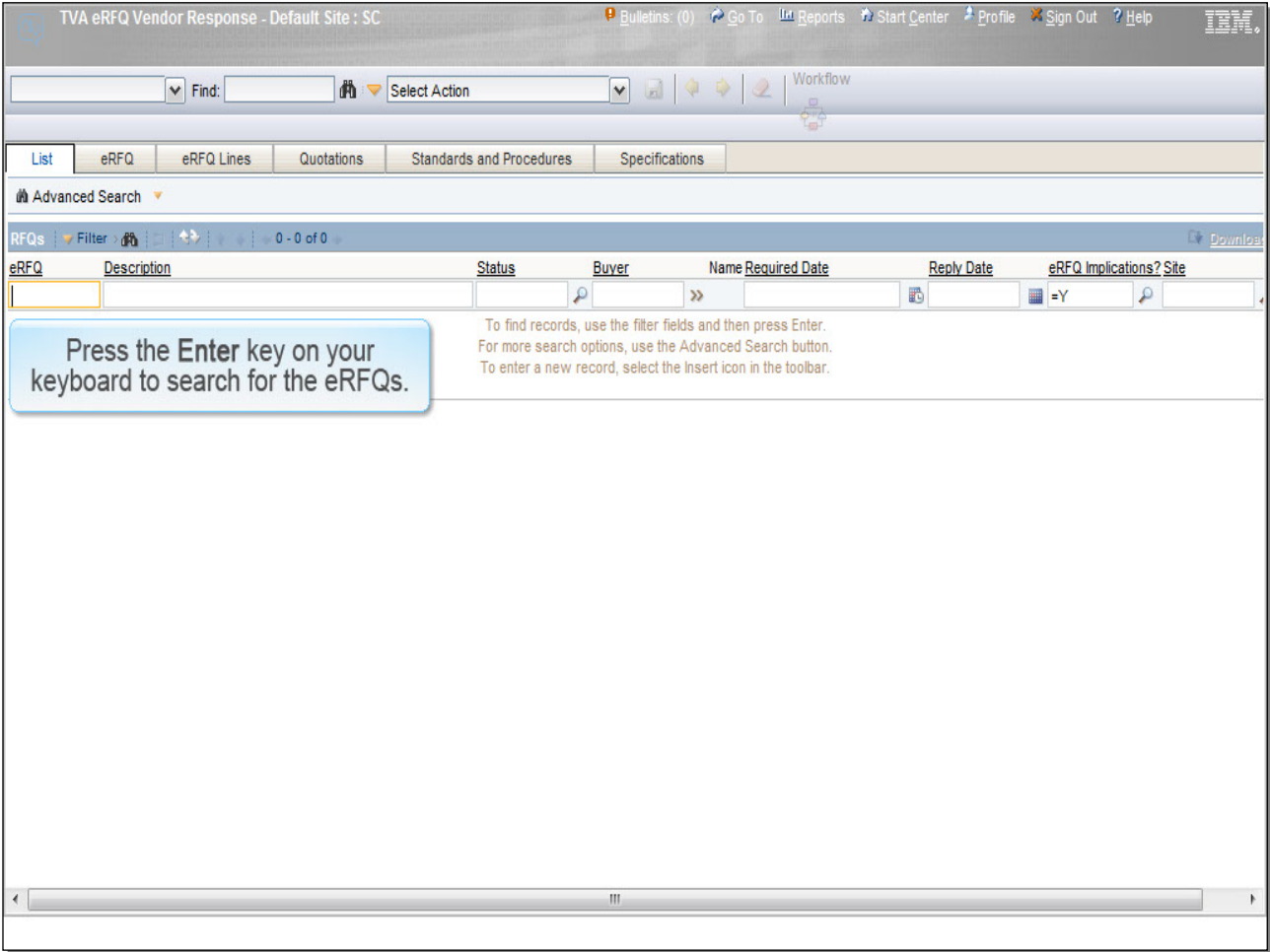
javascript: void(0);

Slide notes

Text Captions

Click the **TVA eRFQ Vendor Response** menu item.

Slide 75 - Submitting a Targeted eRFQ Response



Slide notes

Next, press Enter to display the eRFQs for this company.

Text Captions

Press the **Enter** key on your keyboard to search for the eRFQs.

Slide 76 - Submitting a Targeted eRFQ Response

TVA eRFQ Vendor Response - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListeRFQeRFQ LinesQuotationsStandards and ProceduresSpecifications

Click anywhere to continue.

Advanced Search

RFQsFilter1 - 2 of 2

eRFQ	Description	Status	Buyer	Name	Required Date	Reply Date	eRFQ Implications?	Site
978116	Generated by Reorder 8/9/10 4:56 PM.	OPEN	0CD122570	Welch, Mary D			<input checked="" type="checkbox"/>	CT
978119	Generated by Reorder 8/9/10 4:56 PM.	OPEN	0CD122570	Welch, Mary D			<input checked="" type="checkbox"/>	CT

☐ Select Records

The process to submit a response to an eRFQ is the same as for an open RFQ.

1. Select the eRFQ.

2. Select the eRFQ lines.

3. Enter the Unit Cost (must be in compliance with the existing contract).

4. Save the eRFQ.

5. Submit the eRFQ.

Slide notes

From here, the process to submit a response to an eRFQ is the same as for an open RFQ. You select the eRFQ, select the lines, and enter the Unit Cost. Keep in mind that the Unit Cost must be in compliance with the existing contract.

The last steps are to save and submit the eRFQ.

Text Captions

Click anywhere to continue.

Summary

Submitting an RFQ/eRFQ Response

Access Maximo daily to check for open RFQs and targeted eRFQs.

The process for submitting an RFQ and eRFQ response is the same, except that different applications are used.

Pressing Enter in the RFQ (or eRFQ) field in the respective application retrieves the available RFQs/eRFQs.

The RFQ (or eRFQ) Lines tab and Quotations tab are used to view, select, and respond to line items.

Remember to notify your Contract Manager after saving and submitting an RFQ/eRFQ.

Slide notes

This concludes the lesson. Take a moment to review the key points covered.

Text Captions

Summary

Submitting an RFQ/eRFQ Response

Access Maximo daily to check for open RFQs and targeted eRFQs.

The process for submitting an RFQ and eRFQ response is the same, except that different applications are used.

The RFQ (or eRFQ) Lines tab and Quotations tab are used to view, select, and respond to line items.

Pressing Enter in the RFQ (or eRFQ) field in the respective application retrieves the available RFQs/eRFQs.

Remember to notify your Contract Manager after saving and submitting an RFQ/eRFQ.

Working with the TVA Subcontracting Accomplishments Application



Overview

Accessing the Application

Viewing Existing Records

Creating a Record

Submitting a Record

Updating a Record

Slide notes

In this lesson, you will learn how to work with the TVA Subcontracting Accomplishments application to submit required reports.

Text Captions

Overview

Accessing the Application

Viewing Existing Records

Creating a Record

Submitting a Record

Updating a Record

Overview

TVA Subcontracting Accomplishments

TVA's Supplier Diversity Program is designed to increase the overall participation of qualified small businesses listed here, and businesses within the Tennessee Valley.

- Minority-owned*
- Veteran-owned*
- Woman-owned*
- Service-disabled Veteran-owned*
- HUBZone*

Existing suppliers are required to report subcontracting accomplishments.

The TVA Subcontracting Accomplishments application is used to create and submit these reports.

Slide notes

TVA recognizes the power of maintaining and improving diversity in its supplier base. TVA's Supplier Diversity Program is designed to increase the overall participation of qualified small businesses, as listed here, and businesses within the Tennessee Valley.

Existing suppliers are required to report subcontracting accomplishments as defined by their contractual obligations. The TVA Subcontracting Accomplishments application is used to create and submit these reports.

Text Captions

Overview

TVA Subcontracting Accomplishments

TVA's Supplier Diversity Program is designed to increase the overall participation of qualified small businesses listed here, and businesses within the Tennessee Valley.

Minority-owned

Woman-owned

HUBZone

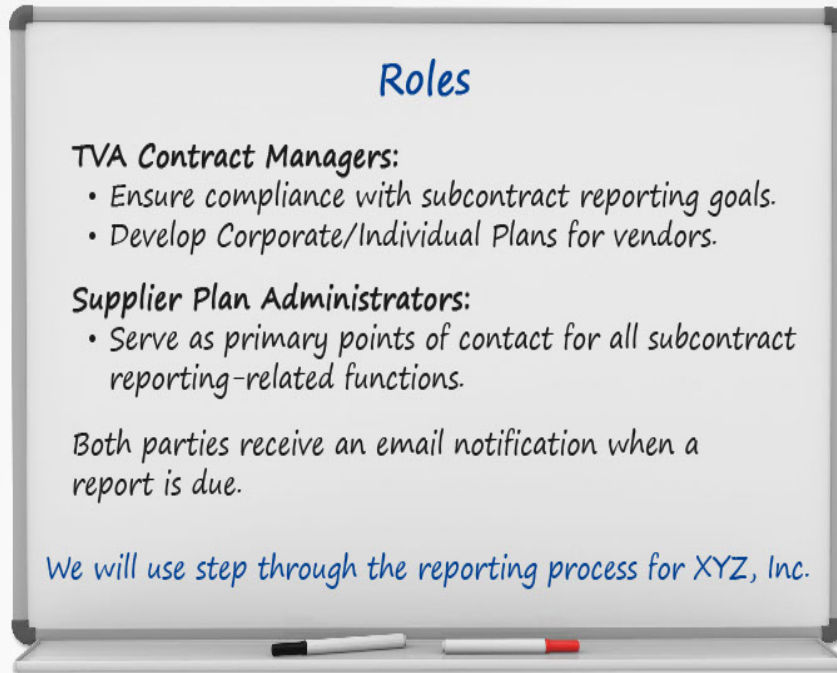
Veteran-owned

Service-disabled Veteran-owned

Existing suppliers are required to report subcontracting accomplishments.

The TVA Subcontracting Accomplishments application is used to create and submit these reports.

Overview



Slide notes

TVA Contract Managers are responsible for ensuring compliance with subcontract reporting goals and timeframes. They develop the Corporate and/or Individual plans for vendors.

Supplier Plan Administrators are the primary points of contact for all subcontract reporting-related functions.

Both parties receive an email notification when a report is due.

For training purposes, we'll step through the quarterly reporting process for the XYZ company, which has an Individual Plan.

Text Captions

Overview

Roles

TVA Contract Managers:

Ensure compliance with subcontract reporting goals.

Develop Corporate/Individual Plans for vendors.

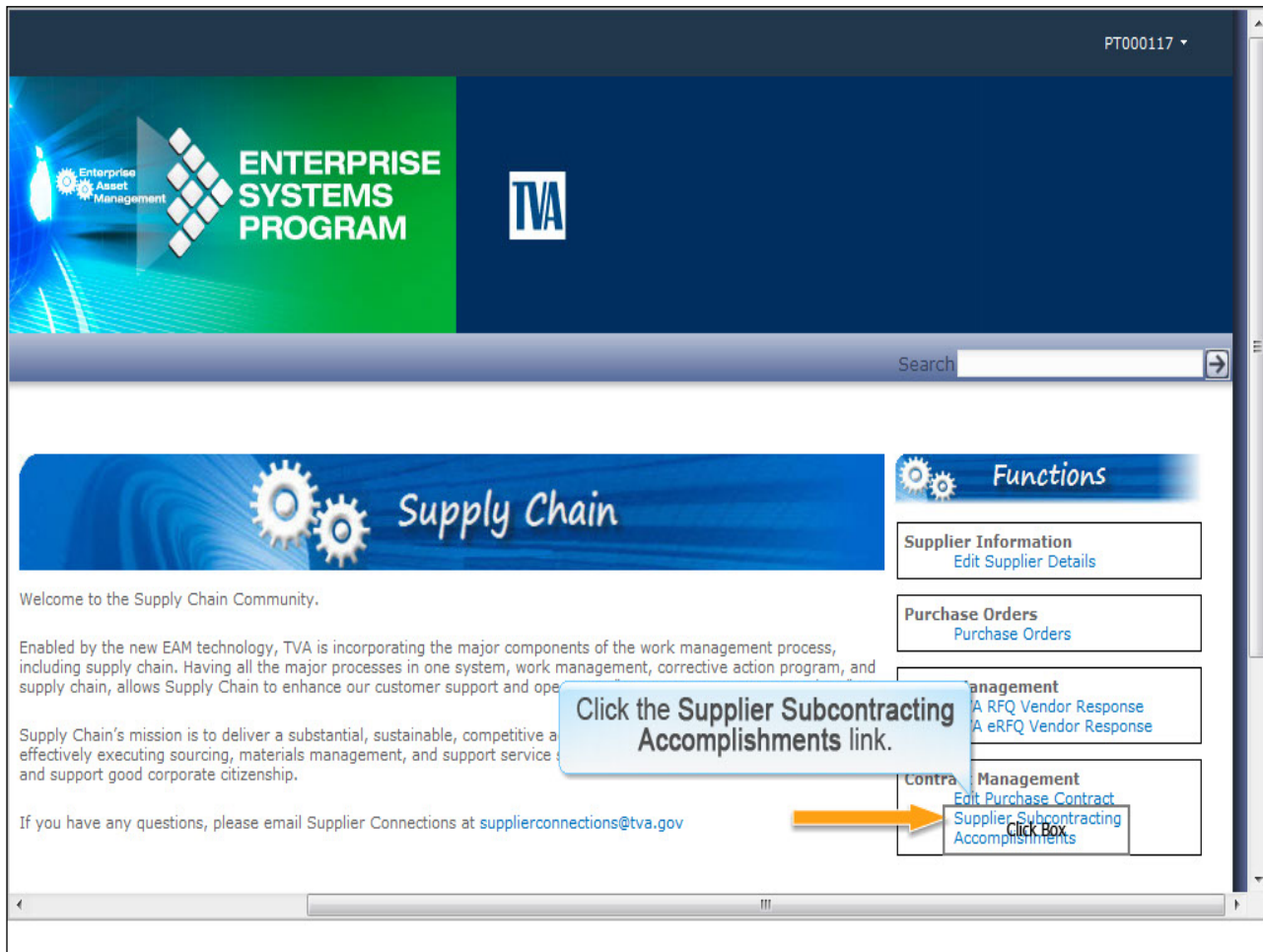
Supplier Plan Administrators:

Serve as primary points of contact for all subcontract reporting-related functions.

Both parties receive an email notification when a report is due.

We will use step through the reporting process for XYZ, Inc.

Slide 81 - Accessing the Application



Slide notes

We'll begin from the Supply Chain portal, where we've scrolled to the right side of the home page. Clicking THIS link accesses the TVA Subcontracting Accomplishments application in Maximo.

Text Captions

Click the **Supplier Subcontracting Accomplishments** link.

Slide 82 - Viewing Existing Records

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

List Main

Filter 0 - 0 of 0 Download

Vendor	Description	Reported Date	Plan ID	Contract Reference PO
--------	-------------	---------------	---------	-----------------------

Press the Enter key on your keyboard to retrieve the records.

To find records, use the filter fields and then press Enter.
For more search options, use the Advanced Search button.
To enter a new record, select the Insert icon in the toolbar.

Slide notes

The application is now open with the List tab displayed. This tab is used to search for and retrieve existing records.

The Main tab is used to create and update new subcontracting accomplishments.

Let's view the records for this company. Moving the insertion point into any field and pressing Enter retrieves the records related to this company. Follow the instructions to do this.

Text Captions

Press the **Enter** key on your keyboard to retrieve the records.

Slide 83 - Viewing Existing Records

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListMain

Filter1 - 3 of 3Download

Vendor	Description	Reported Date	Plan ID	Contract Reference PO
5555555555-00	XYZ Inc.	2014 Q3: 04/01/2014 - 06/30/2014	15,845	9552
5555555555-00	XYZ Inc.	2013 Q2: 01/01/2013 - 03/31/2013	15,845	9552
5555555555-00	XYZ Inc.	2013 Q4: 07/01/2013 - 09/30/2013	15,845	9552

☐ Select Records

Slide notes

You now see the quarterly report records that have already been created. To view or update a record, you can click the Vendor number. The record is then displayed in the Main tab.

Text Captions

Slide 84 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

List Main

Filter 1 - 3 of 3 Download

Vendor	Description	Reported Date	Plan ID	Contract Reference PO
555555555-00	XYZ Inc.	2014 Q3: 04/01/2014 - 06/30/2014	15,845	9552
555555555-00	XYZ Inc.	2013 Q2: 01/01/2013 - 03/31/2013	15,845	9552
555555555-00	XYZ Inc.	2013 Q4: 07/01/2013 - 09/30/2013	15,845	9552

☐ Select Records

Slide notes

Instead of viewing a record now, we're going to create a new one. To start the process, click the New Record icon.

Text Captions

Click the **New Record** icon.

Slide 85 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToList ReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan Information

Plan ID*

Reported Date*

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$

Vendor

Contract Reference

Reporting Frequency

Click the Select Value icon.

Actuals

Percentage

Goals

Total Large Business Actual \$

Total Small Business Actual \$*

Total Spend Actual \$ - Corporate Plan Only

Minority Business / Small Disadvantaged Business Actual \$

Woman-Owned Small Business Actual \$

HUBZone Small Business Actual \$

Veteran-Owned Small Business Actual \$

Service-Disabled Veteran-Owned Small Business Actual \$

Valley Business Actual \$

%

Goals %

User Comments

Comments

Slide notes

A new, blank record has opened in the Main tab. Maximo has pre-populated the Vendor Plan ID number, which TVA created for this company. To create a record, you start by completing the information in the top section, and then enter the dollar amounts spent in the Actuals section.

Let's begin by entering the Plan ID, which represents the Subcontracting Plan ID specific to this company. Clicking the Select Value icon displays the plans associated with the company. Follow the instructions on the screen.

Text Captions

Click the **Select Value** icon.

Slide 86 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToList ReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan IDPlan Information

Plan ID*Reported Date*

Get Total Amount for Invoices PTotal Invoices Paid Amount \$

Actuals

Minority Business / Small Disadvantaged E%Woman-Owned Small Business Actual \$%HUBZone Small Business Actual \$%Veteran-Owned Small Business Actual \$%Service-Disabled Veteran-Owned Small Business Actual \$%Valley Business Actual \$%

User CommentsComments

Select Value

Filter1 - 1 of 1Download

Plan ID	Vendor	Description	Contract Reference	PO	Plan Type
15,845	5555555555-00	XYZ Inc.	9552		I

Click Plan ID 15,845.

Cancel

Goals %Goals %Goals %Goals %Goals %Goals %

Slide notes
Text Captions

Click Plan ID 15,845.

Slide 87 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan ID*15,845

Reported Date*

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$

Plan Information

Vendor555555555-0

Contract Reference9552

PO

Plan TypeIIndividual

Reporting FrequencyQQuarterly

Actuals

Percentage

Goals

Total Large Business Actual \$%

Total Small Business Actual \$*%Goals %23.00

Total Spend Actual \$ - Corporate Plan Only%Goals %5.00

Minority Business / Small Disadvantaged Business Actual \$%Goals %5.00

Woman-Owned Small Business Actual \$%Goals %3.00

HUBZone Small Business Actual \$%Goals %3.00

Veteran-Owned Small Business Actual \$%Goals %3.00

Service-Disabled Veteran-Owned Small Business Actual \$%Goals %70.00

Valley Business Actual \$%

User Comments

Comments

Slide notes

Maximo has populated the fields in the Plan Information section based on the Plan ID just selected. Notice that the fields are grayed out, meaning they cannot be edited. You can see that this company is on an Individual plan with quarterly reporting requirements.

Take a moment to learn more about these fields by moving your mouse pointer over each one.

Text Captions

Slide 88 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Workflow

List

Move your mouse pointer over each field in the Plan Information section for a description.

Click here when you are ready to continue.

Please Use Selector to Enter Reported Date and Plan ID

Plan ID*15,845

Reported Date*

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$

Plan Information

Vendor555555555-0

Contract Reference9552

PO

Plan TypeIndividual

Reporting FrequencyQuarterly

Actuals

Percentage

Goals

Total Large Business Actual \$%

Total Small Business Actual \$*%Goals %23.00

Total Spend Actual \$ - Corporate Plan Only%Goals %5.00

Minority Business / Small Disadvantaged Business Actual \$%Goals %5.00

Woman-Owned Small Business Actual \$%Goals %3.00

HUBZone Small Business Actual \$%Goals %3.00

Veteran-Owned Small Business Actual \$%Goals %3.00

Service-Disabled Veteran-Owned Small Business Actual \$%Goals %70.00

Valley Business Actual \$%

User Comments

Comments

Slide notes

Text Captions

Move your mouse pointer over each field in the Plan Information section for a description.

Click here when you are ready to continue.

Slide 89 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan Information

Plan ID*15,845

Vendor5555555555-0

Reported Date*

Contract Reference9552

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$

Click the Select Value icon.

Actuals

Percentage

Goals

Total Large Business Actual \$

%

Goals %23.00

Total Small Business Actual \$*

%

Goals %5.00

Total Spend Actual \$ - Corporate Plan Only

%

Goals %5.00

Minority Business / Small Disadvantaged Business Actual \$

%

Goals %3.00

Woman-Owned Small Business Actual \$

%

Goals %3.00

HUBZone Small Business Actual \$

%

Goals %3.00

Veteran-Owned Small Business Actual \$

%

Goals %70.00

Service-Disabled Veteran-Owned Small Business Actual \$

%

Valley Business Actual \$

User Comments

Comments

Slide notes

Next, you need to select the Reported Date value, which is the quarterly reporting period for this new record.

Text Captions

Click the **Select Value** icon.

Slide 90 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

List Main

Vendor Plan ID

Please Use Selector to Enter Reported Date and Plan ID

Plan ID 15,845

Reported Date

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$

Actuals

Click the 2015 Q2 value.

Total Spend Actual \$

Minority Business / Small Disadvantage

Woman-Owned Small Business

HUBZone Small Business

Veteran-Owned Small Business

Service-Disabled Veteran-Owned Small Business Actual \$ %

Valley Business Actual \$ %

User Comments

Comments

Select Value

Filter 1 - 11 of 11 Download

Reported Date

2013 Q1: 10/01/2012 - 12/31/2012

2013 Q2: 01/01/2013 - 03/31/2013

2013 Q3: 04/01/2013 - 06/30/2013

2013 Q4: 07/01/2013 - 09/30/2013

14 Q1: 10/01/2013 - 12/31/2013

14 Q2: 01/01/2014 - 03/31/2014

14 Q3: 04/01/2014 - 06/30/2014

14 Q4: 07/01/2014 - 09/30/2014

2015 Q1: 10/01/2014 - 12/31/2014

2015 Q2: 01/01/2015 - 03/31/2015

2015 Q3: 04/01/2015 - 06/30/2015

Cancel

Individual

Quarterly

Goals

Goals % 23.00

Goals % 5.00

Goals % 5.00

Goals % 3.00

Goals % 3.00

Goals % 3.00

Goals % 3.00

Goals % 70.00

Slide notes

Text Captions

Click the **2015 Q2** value.

Slide 91 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Report Data

Plan IDReported Date2015

Click the Get Total Amount for Invoices Paid button.

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$

POPlan TypeIndividualReporting FrequencyQuarterly

Actuals	Percentage	Goals
Total Large Business Actual \$	%	
Total Small Business Actual \$	%	Goals %23.00
Total Spend Actual \$ - Corporate Plan Only	%	Goals %5.00
Minority Business / Small Disadvantaged Business Actual \$	%	Goals %5.00
Woman-Owned Small Business Actual \$	%	Goals %3.00
HUBZone Small Business Actual \$	%	Goals %3.00
Veteran-Owned Small Business Actual \$	%	Goals %3.00
Service-Disabled Veteran-Owned Small Business Actual \$	%	Goals %70.00
Valley Business Actual \$	%	

User Comments

Comments

Slide notes

Now look at the Goals section. These fields have been populated with the appropriate percentages based on this particular plan. Your next step is to enter the actual amounts invoiced.

It's important to enter the total amount first, and then allocate that amount among the categories. Remember that the total amount cannot exceed the amount of invoices paid.

To determine the total amount of invoices paid, you can click THIS button. Let's take a look.

Text Captions

Click the **Get Total Amount for Invoices Paid** button.

Slide 92 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan ID15,845

Reported Date2015 Q2: 01/01/2015 - 03/31/2015

Click anywhere to continue.

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$24,975.00

PO

Plan TypeIndividual

Reporting FrequencyQuarterly

Actuals

Percentage

Goals

Total Large Business Actual \$

Total Small Business Actual \$

Total Spend Actual \$ - Corporate Plan Only

Minority Business / Small Disadvantaged Business Actual \$

Woman-Owned Small Business Actual \$

HUBZone Small Business Actual \$

Veteran-Owned Small Business Actual \$

Service-Disabled Veteran-Owned Small Business Actual \$

Valley Business Actual \$

Goals %23.00

Goals %5.00

Goals %5.00

Goals %3.00

Goals %3.00

Goals %3.00

Goals %70.00

User Comments

Comments

Slide notes

You now see the amount paid. For this example, the goal is for the Total Small Business Actual amount to be at least 23 percent of this amount.

Text Captions

Click anywhere to continue.

Slide 93 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan Information

Plan ID*15,845

Vendor555555555-0

Reported Date*2015 Q2: 01/01/2015 - 03/31/2015

Contract Reference9552

PO

Plan TypeIIndividual

Reporting FrequencyQQuarterly

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$24,975.00

Actuals

Percentage

Goals

Total Large Business Actual \$

%

Goals %23.00

Total Small Business Actual \$*

%

Goals %5.00

Total Spend Actual \$ - Corporate Plan Only

%

Goals %5.00

Minority Business / Small Disadvantaged Business Actual \$

%

Goals %3.00

Woman-Owned Small Business Actual \$

%

Goals %3.00

HUBZone Small Business Actual \$

%

Goals %3.00

Veteran-Owned Small Business Actual \$

%

Goals %70.00

Service-Disabled Veteran-Owned Small Business Actual \$

%

Valley Business Actual \$

User Comments

Comments

Slide notes

For training purposes, we'll display the values that the XYZ company is reporting this quarter.

Text Captions

Slide 94 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

ListMain

Vendor Plan ID35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan Information

Plan ID15,845

Vendor5555555555-0

Reported Date2015 Q2: 01/01/2015 - 03/31/2015

Click anywhere to continue.

Get Total Amount for Invoices Paid

Individual

Total Invoices Paid Amount \$24,975.00

Reporting FrequencyQ

Quarterly

Actuals

Percentage

Goals

Total Large Business Actual \$

%

Goals %23.00

Total Small Business Actual \$7,500.00

%

Goals %5.00

Total Spend Actual \$ - Corporate Plan Only

%

Goals %5.00

Minority Business / Small Disadvantaged Business Actual \$2,000.00

%

Goals %3.00

Woman-Owned Small Business Actual \$2,000.00

%

Goals %3.00

HUBZone Small Business Actual \$

%

Goals %3.00

Veteran-Owned Small Business Actual \$

%

Goals %3.00

Service-Disabled Veteran-Owned Small Business Actual \$3,500.00

%

Goals %70.00

Valley Business Actual \$

%

User Comments

Comments

We continue to support TVA's goal of 100% Subcontract Reporting compliance. Thank you.

Slide notes

Since the company is on an Individual plan, we completed the Total Small Business Actual field. Records for Corporate plans use the Total Large Business Actual field.

We also allocated the total amount among several categories.

The Comments field is optional, but we chose to enter this comment.

Text Captions

Click anywhere to continue.

Slide 95 - Creating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

List Main

Vendor Plan ID 35,488

Click the Save Record icon.

Please Use Selector to Enter Reported Date and Plan ID

Plan ID * 15,845

Reported Date * 2015 Q2: 01/01/2015 - 03/31/2015

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$ 24,975.00

Plan Information

Vendor 555555555-0

Contract Reference 9552

PO

Plan Type I Individual

Reporting Frequency Q Quarterly

Actuals	Percentage	Goals
Total Large Business Actual \$	%	
Total Small Business Actual \$ * 7,500.00	%	Goals % 23.00
Total Spend Actual \$ - Corporate Plan Only	%	Goals % 5.00
Minority Business / Small Disadvantaged Business Actual \$ 2,000.00	%	Goals % 5.00
Woman-Owned Small Business Actual \$ 2,000.00	%	Goals % 3.00
HUBZone Small Business Actual \$	%	Goals % 3.00
Veteran-Owned Small Business Actual \$	%	Goals % 3.00
Service-Disabled Veteran-Owned Small Business Actual \$ 3,500.00	%	Goals % 70.00
Valley Business Actual \$	%	

User Comments

Comments We continue to support TVA's goal of 100% Subcontract Reporting compliance. Thank you.

Slide notes

Now that all the fields have been completed, the next step is to save the record.

Text Captions

Click the **Save Record** icon.

Slide 96 - Submitting a Record

The screenshot shows the 'TVA Subcontracting Accomplishments - Default Site : SC' interface. A message at the top states 'BMXAA4205I - Record has been saved.' with an orange arrow pointing to it. Below this, a 'Workflow' icon is highlighted with a blue callout box that says 'Click the Route Workflow icon.' The main form contains fields for Plan ID (15,845), Vendor (5555555555-0), Reported Date (2015 Q2: 01/01/2015 - 03/31/2015), Contract Reference (9552), PO, Plan Type (I), and Reporting Frequency (Q). A button 'Get Total Amount for Invoices Paid' is present, with a total amount of \$24,975.00. Below this is a table with three columns: Actuals, Percentage, and Goals. The 'Percentage' column is highlighted with an orange box. The 'Actuals' column lists various business categories and their actual values. The 'Percentage' column shows the corresponding percentages. The 'Goals' column shows the target percentages for each category. At the bottom, there is a 'User Comments' section with a comment: 'We continue to support TVA's goal of 100% Subcontract Reporting compliance. Thank you.'

Actuals	Percentage	Goals
Total Large Business Actual \$	% 0.00	Goals % 23.00
Total Small Business Actual \$ 7,500.00	% 30.03	Goals % 5.00
Total Spend Actual \$ - Corporate Plan Only	%	Goals % 5.00
Minority Business / Small Disadvantaged Business Actual \$ 2,000.00	% 8.01	Goals % 3.00
Woman-Owned Small Business Actual \$ 2,000.00	% 8.01	Goals % 3.00
HUBZone Small Business Actual \$	% 0.00	Goals % 3.00
Veteran-Owned Small Business Actual \$	% 0.00	Goals % 3.00
Service-Disabled Veteran-Owned Small Business Actual \$ 3,500.00	% 14.01	Goals % 70.00
Valley Business Actual \$	% 0.00	

Slide notes

As you can see HERE, Maximo has saved the record.

The Percentages fields have been populated based on the actuals just entered. You can then compare the actual percentages to the goal percentages.

Your last step is to submit the record by clicking the Route Workflow icon.

Text Captions

Click the **Route Workflow** icon.

Slide 97 - Submitting a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

BMXAA4411I - Process TVAESRS started.

Click the List tab.

Select Action Workflow

Click Box Main

Vendor Plan ID 35,488

Please Use Selector to Enter Reported Date and Plan ID

Plan ID * 15,845

Reported Date * 2015 Q2: 01/01/2015 - 03/31/2015

Get Total Amount for Invoices Paid

Total Invoices Paid Amount \$ 24,975.00

Plan Information

Vendor 5555555555-0

Contract Reference 9552

PO

Plan Type I Individual

Reporting Frequency Q Quarterly

Actuals	Percentage	Goals
Total Large Business Actual \$	% 0.00	
Total Small Business Actual \$ * 7,500.00	% 30.03	Goals % 23.00
Total Spend Actual \$ - Corporate Plan Only	%	
Minority Business / Small Disadvantaged Business Actual \$ 2,000.00	% 8.01	Goals % 5.00
Woman-Owned Small Business Actual \$ 2,000.00	% 8.01	Goals % 5.00
HUBZone Small Business Actual \$	% 0.00	Goals % 3.00
Veteran-Owned Small Business Actual \$	% 0.00	Goals % 3.00
Service-Disabled Veteran-Owned Small Business Actual \$ 3,500.00	% 14.01	Goals % 3.00
Valley Business Actual \$	% 0.00	Goals % 70.00

User Comments

Comments We continue to support TVA's goal of 100% Subcontract Reporting compliance. Thank you.

Slide notes

The message HERE indicates that the record was submitted. Both you and the TVA Contract Manager will receive an email notification containing the details of the record.

Look over the screen and then return to the List tab.

Text Captions

Click the **List** tab.

Slide 98 - Updating a Record

TVA Subcontracting Accomplishments - Default Site : SC

Bulletins: (0)Go ToList ReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListMain

1 - 3 of 3Download

Vendor	Description	Reported Date	Plan ID	Contract Reference PO
555555555-00	XYZ Inc.	2014 Q3: 04/01/2014 - 06/30/2014	15,845	9552
555555555-00	XYZ Inc.	2013 Q2: 01/01/2013 - 03/31/2013	15,845	9552
555555555-00	XYZ Inc.	2013 Q4: 07/01/2013 - 09/30/2013	15,845	9552

Select Records

To update a report, select the record.

Only the Actual amounts are editable.

The process is then the same as creating a new record.

Click anywhere to continue.

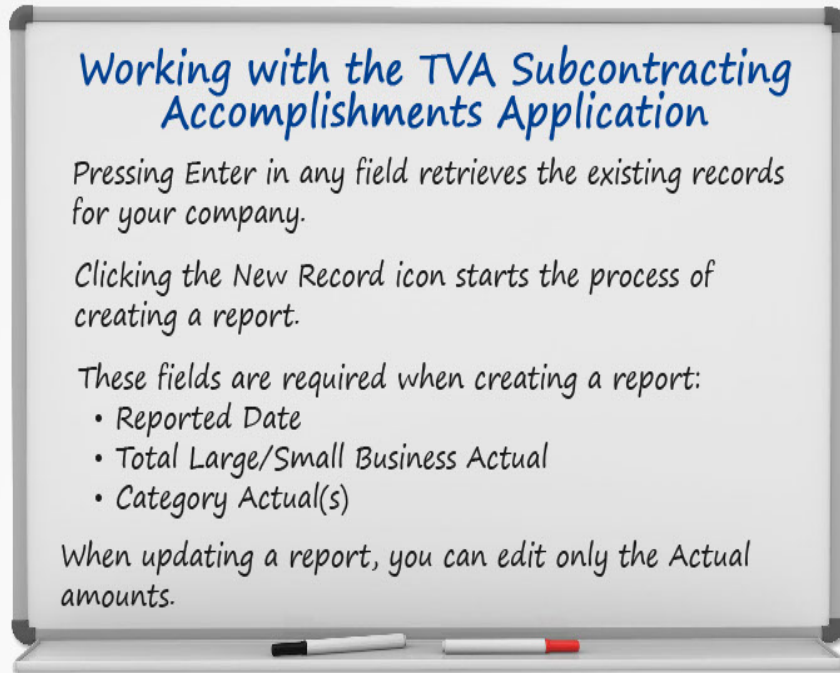
Slide notes

If you need to update a report after submitting it, just select the record from the List tab. It is then opened in the Main tab, where the only editable fields are the Actual amounts. The process from that point is the same as creating a new record.

Text Captions

Click anywhere to continue.

Summary



Slide notes

This concludes the lesson. Take a moment to review the key points covered.

Text Captions

Summary

Pressing Enter in any field retrieves the existing records for your company.

Working with the TVA Subcontracting Accomplishments Application

Clicking the New Record icon starts the process of creating a report.

These fields are required when creating a report:

Reported Date

Total Large/Small Business Actual

Category Actual(s)

When updating a report, you can edit only the Actual amounts.

Working with the Purchase Contracts Application



Overview

Accessing the Application

Revising a Purchase Contract

Using the Export/Import Tool

Slide notes

In this lesson, you'll learn how to use the Purchase Contracts application to revise a purchase contract.

Text Captions

Overview

Accessing the Application

Revising a Purchase Contract

Using the Export/Import Tool

Overview

Purchase Contracts Application

Enables you to view and update details of existing purchase contracts.

Two methods to revise purchase contract lines:

- Editing < 50 lines: Edit in the application.*
- Editing > 50 lines: Use the Export/Import tool.*

Export/Import tool:

- 1. Export all purchase contract lines to a spreadsheet.*
- 2. Make changes in Microsoft Excel.*
- 3. Import changes into Maximo.*

We will work with the fictional XYZ Inc. purchase contract.

Slide notes

Maximo's Purchase Contracts application enables you to view and update details of existing purchase contracts.

You can use two different methods to revise the lines in a purchase contract. If you are editing fewer than 50 lines, it's generally most efficient to edit them directly in the application. If you need to modify MORE than 50 lines, it's generally most efficient to use the Export/Import tool. This tool lets you export all line items to a spreadsheet, make the changes in Microsoft Excel on your computer, and then import the changes back into Maximo.

For training purposes, we're going to update the pricing and delivery lead time for one of the XYZ company's purchase contracts.

Text Captions

Overview

Purchase Contracts Application

Enables you to view and update details of existing purchase contracts.

Two methods to revise purchase contract lines:

Editing < 50 lines: Edit in the application.

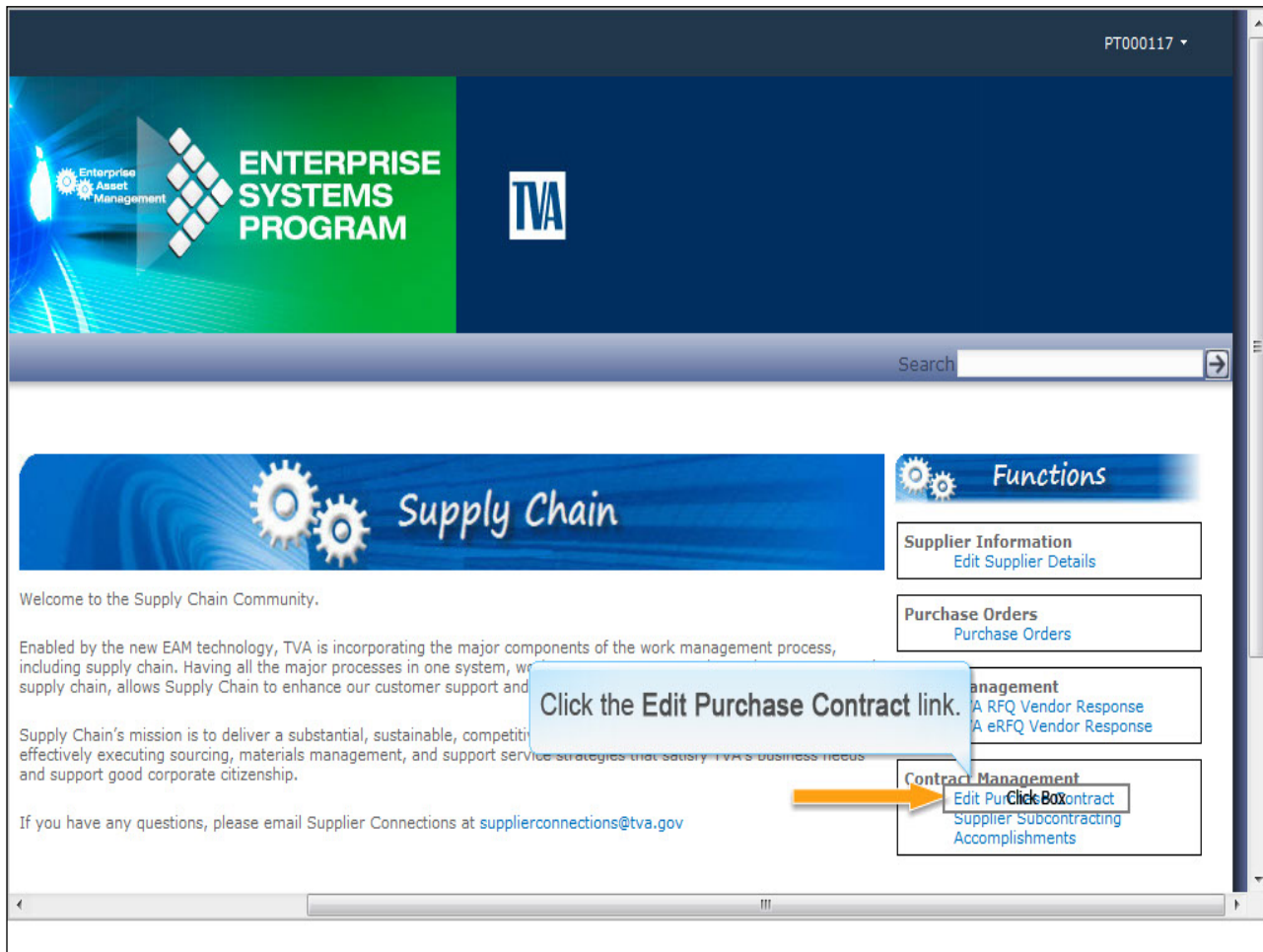
Editing > 50 lines: Use the Export/Import tool.

Export/Import tool:

- . Export all purchase contract lines to a spreadsheet.*
- . Make changes in Microsoft Excel.*
- . Import changes into Maximo.*

We will work with the fictional XYZ Inc. purchase contract.

Slide 102 - Accessing the Application



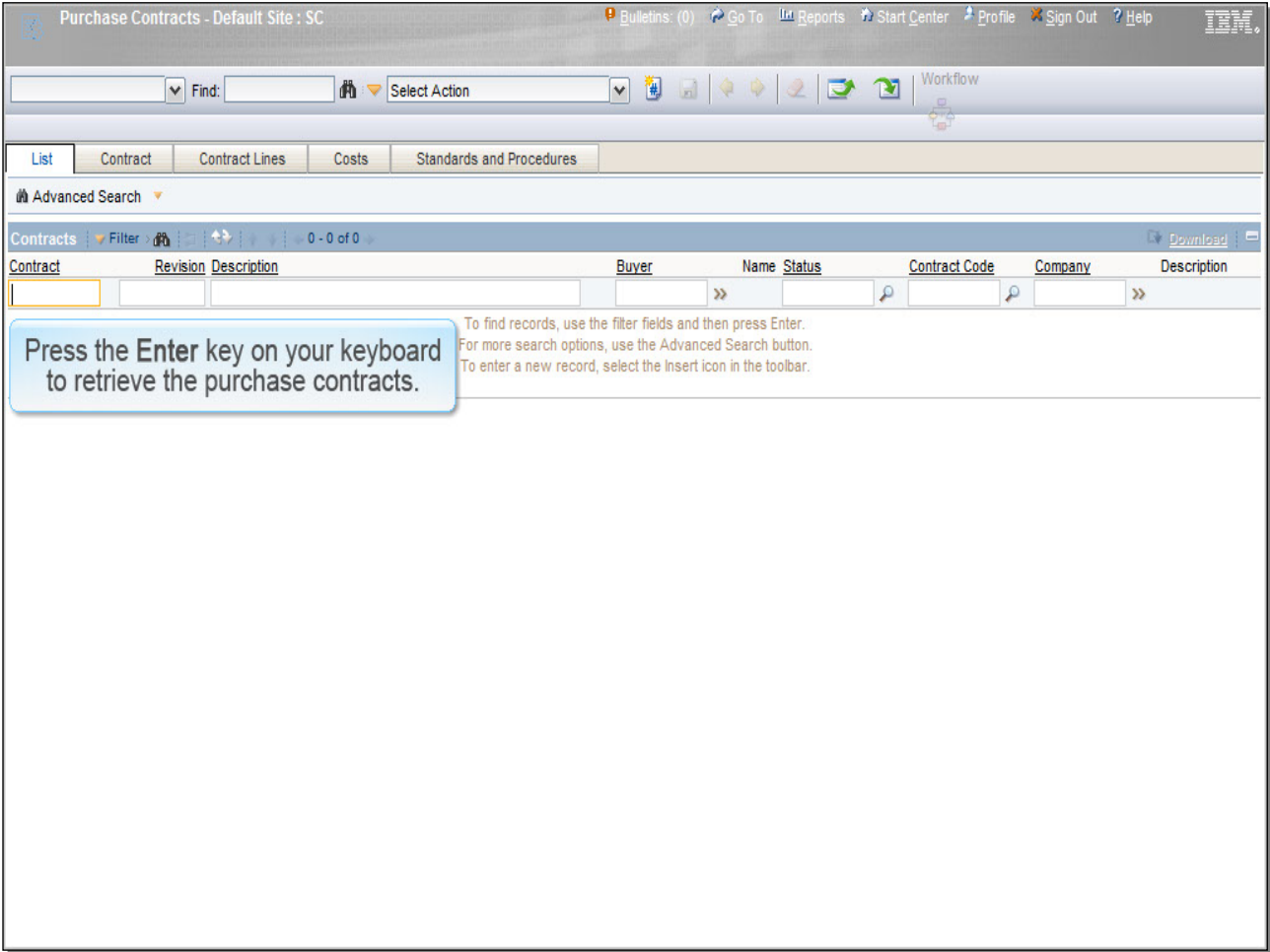
Slide notes

We'll begin from the Supply Chain portal, where we've scrolled to the right side of the home page. Clicking THIS link accesses the Purchase Contracts application in Maximo.

Text Captions

Click the **Edit Purchase Contract** link.

Slide 103 - Revising a Purchase Contract



Slide notes

The application is now open with the List tab displayed.

The first step is to locate and open the purchase contract that needs to be revised. Pressing Enter in any of the fields retrieves the purchase contracts for the company. Follow the instructions on the screen to access and select the contract.

Text Captions

Press the **Enter** key on your keyboard to retrieve the purchase contracts.

Slide 104 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelpIBM

Find:

Select Action

Workflow

List

Contract

Contract Lines

Costs

Standards and Procedures

Advanced Search

ContractsFilter1 - 1 of 1Download

Contract	Revision	Description	Buyer	Name	Status	Contract Code	Company	Description
9552		3 Truck Parts	UNIFEN6CW	Tilley, Zachary Eugene	APPR	MATERIAL	5555555555-00	XYZ Inc.

☐ Select Records

Click Contract 9552.

Slide notes

Text Captions

Click Contract 9552.

Slide 105 - Revising a Purchase Contract

Purchase Contracts - Default

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Workflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision3Update pricing and delivery timesStatusAPPR

Contract CodeMATERIAL

AttachmentsView/AttachPrint

DetailsDates

Master Contract>>

BuyerUNIFEN6CW>>Tilley, Zachary Eugene

Buyer DepartmentDC92100000>>OPS SUP

Contract Technical Steward>>

Start Date03/30/2015

End Date03/31/2016

COI Expiration Date

Renewal Notification120

Renewal Date12/02/2015

Vendor

Company555555555-0>>XYZ Inc.

Address 1123 Industrial Way

CityAnywhere

State/Province

ZIP/Postal Code33334

ContactJohn Doe

Phone

Freight TermsCOL

FOB Point

Ship Via

Ship Type

Payment Terms.15 % 13 DISC DAYS 30 NET DAYS

Slide notes

The next step is to open this contract in the Contract Lines tab, where you can start the process of revising it.

Text Captions

Click the **Contract Lines** tab.

Slide 106 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsGENERAL

Revision3Update pricing and delivery timesStatusAPPR

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	20.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Click the **Select Action** drop-down arrow.

Slide notes

Here you see all of the lines associated with this contract.

The Select Action menu contains the option to revise the contract.

Text Captions

Click the **Select Action** drop-down arrow.

Slide 107 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

Click the Revise Contract (PORTAL) menu item.

Contract: 9552 Truck Parts
Revision: 3 Update pricing and delivery times
Contract Code: MATERIAL

Type: TVA GENERAL
Status: APPR

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	20.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Slide notes

Text Captions

Click the **Revise Contract** (PORTAL) menu item.

Slide 108 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision3Update pricing and delivery timesStatusAPPR

Contract CodeMATERIAL

Contract LinesFilterDownload

Line	Line Type	Item	Unit Cost	Line Cost
1	ITEM	CWD987Q	20.000000	20.00
2	ITEM	CWD988N	25.000000	25.00
3	ITEM	CWD989L	30.000000	30.00
4	ITEM	CWD990F	35.000000	35.00
5	ITEM	CWD991D	40.000000	40.00
7	ITEM	CWD992B	45.000000	45.00
8	ITEM	CWD993X	50.000000	50.00
10	ITEM	CWD994V	55.000000	55.00
11	ITEM	CWD995R	60.000000	60.00
12	ITEM	CWD996P	65.000000	65.00

Revise Contract

Enter a description for the revised contract. Click OK when finished.

Contract Reference9552

Revision4

OKCancel

TRUCK,AUTOMOTIVE, QA 0, FLATBED

1.00 EA

Slide notes

Now we need to enter a reason for revising the contract. Watch the demonstration.

Text Captions

Slide 109 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERALRevision3Update pricing and delivery timesStatusAPPRContract CodeMATERIAL

Contract LinesFilterDownload

Line	Line Type	Item	Unit Cost	Line Cost
1	ITEM	CWD987Q	20.000000	20.00
2	ITEM	CWD988N	25.000000	25.00
3	ITEM	CWD989L	30.000000	30.00
4	ITEM	CWD990F	35.000000	35.00
5	ITEM	CWD991D	40.000000	40.00
7	ITEM	CWD992B	45.000000	45.00
8	ITEM	CWD993X	50.000000	50.00
10	ITEM	CWD994V	55.000000	55.00
11	ITEM	CWD995R	60.000000	60.00
12	ITEM	CWD996P	65.000000	65.00

Revise Contract

Enter a description for the revised contract. Click OK when finished.

Contract Reference9552Update pricing and delivery time

Revision4

OKCancel

TRUCK,AUTOMOTIVE, QA 0, FLATBED

1.00 EA

Slide notes
Text Captions

Slide 110 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision3Update pricing and delivery timesStatusAPPR

Contract CodeMATERIAL

Contract LinesFilterDownload

Line	Line Type	Item	Unit Cost	Line Cost
1	ITEM	CWD987Q	20.000000	20.00
2	ITEM	CWD988N	25.000000	25.00
3	ITEM	CWD989L	30.000000	30.00
4	ITEM	CWD990F	35.000000	35.00
5	ITEM	CWD991D	40.000000	40.00
7	ITEM	CWD992B	45.000000	45.00
8	ITEM	CWD993X	50.000000	50.00
10	ITEM	CWD994V	55.000000	55.00
11	ITEM	CWD995R	60.000000	60.00
12	ITEM	CWD996P	65.000000	65.00

Revise Contract

Enter a description for the revised contract. Click OK when finished.

Contract Reference9552Update pricing and delivery time

Revision4

ClickOKBoxCancel

Click the OK button.

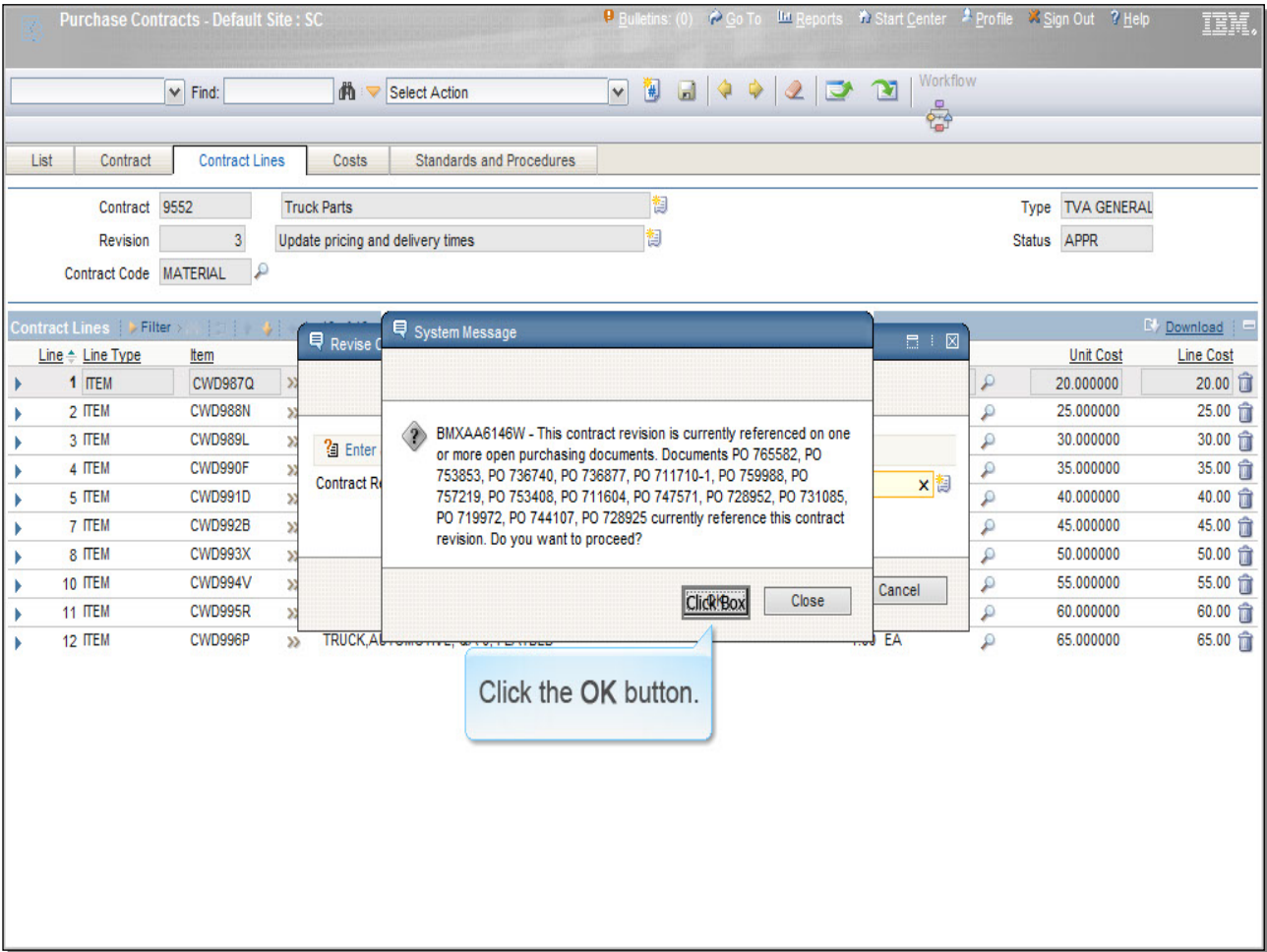
Slide notes

Look this over and then click OK.

Text Captions

Click the **OK** button.

Slide 111 - Revising a Purchase Contract



Slide notes

This system message is informing us that the contract we're revising is referenced in one or more existing purchase orders. The PO numbers are listed here.

Look over the message and then click OK.

Text Captions

Click the **OK** button.

Slide 112 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Find:

Select Action

Workflow

List

Contract

Contract Lines

Costs

Standards and Procedures

Contract 9552

Truck Parts

Type TVA GENERAL

Revision 4

Update pricing and delivery time

Status VDRAFT

Contract Code MATERIAL

Contract Lines

Filter

1 - 10 of 10

Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	20.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
			TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
			TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
			TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
			TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Slide notes

The status of the purchase contract has changed to VDRAFT and the lines in the contract can now be edited. Clicking the View Details icon to the left of a line displays the fields.

Let's work with THIS item.

Text Captions

Click the **View Details** icon.

Slide 113 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

Contract9552Truck PartsTypeTVA GENERAL

Revision4Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract Lines

Filter

1 - 10 of 10

Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	21
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1

Line TypeITEM

ItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBED

QA Level0

Green ProcurementH

Manufacturer987654459

DescriptionSNORKEL

Mfg. Part NumberPT-000-111

Commodity Group2510A

Quantity and Costs

Quantity1.00

StatusPNDREV

Details

Click inside the scroll bar.

Slide notes

Now scroll down to view the rest of the fields.

Text Captions

Click inside the scroll bar.

Slide 114 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	21
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost20.000000Line Cost20.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time10

Slide notes

Any field that is not grayed out can be updated. In this example, we need to change the Unit Cost and Delivery Time. Watch the demonstration.

Text Captions

Slide 115 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	21
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost20.000000Line Cost20.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time10

Slide notes

Text Captions

Slide 116 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	21
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost22.00Line Cost20.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time10

Slide notes

Text Captions

Slide 117 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	20.000000	21
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost22.00Line Cost20.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time10

Slide notes

Text Captions

Slide 118 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost22.000000Line Cost22.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time

Slide notes

Text Captions

Slide 119 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:

Select Action

Workflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost22.000000Line Cost22.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time12

Slide notes

Text Captions

Slide 120 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

1	ITEM	CWD987Q	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED				2:
2	ITEM	CWD988N	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED				2^
3	ITEM	CWD989L	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED				3
4	ITEM	CWD990F	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987Q >> TRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459 >>

DescriptionSNORKEL

Mfg. Part NumberPT-000-111

Commodity Group2510A >> VEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAStatusPNDREVEntered ByHMDMUQG2A, PT000117Entered Date04/15/2015 3:18 PMRemarksDelivery Time12

Unit Cost22.000000Line Cost22.00Retention?Change Price on Use?

Click the Save Purchase Contract icon.

Slide notes

If any other lines need to be revised, you repeat this process. For this example, just this item needs updating.
The next step is to save the purchase contract record.

Text Captions

Click the **Save Purchase Contract** icon.

Slide 121 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

BMXAA4205I - Record has been saved.

Find:Select ActionWorkflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED			25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED			30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED			35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost22.000000Line Cost22.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time12

Slide notes

Finally, click the Route Workflow icon to submit the revision.

Text Captions

Click the **Route Workflow** icon.

Slide 122 - Revising a Purchase Contract

Purchase Contracts - Default Site : SC

BMXAA44411 - Process GCNTRT started.

Find: Select Action Workflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Line Item

Coverage

Manufacturer 987654459

Line 1

Line Type ITEM

Item CWD987Q TRUCK,AUTOMOTIVE, QA 0

QA Level 0

Green Procurement H

VEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Click anywhere to continue.

Quantity and Costs

Details

Quantity 1.00

Order Unit EA

Unit Cost 22.000000

Line Cost 22.00

Retention?

Change Price on Use?

Status PNDREV

Entered By HMDMUQG2A PT000117

Entered Date 04/15/2015 3:18 PM

Remarks

Delivery Time 12

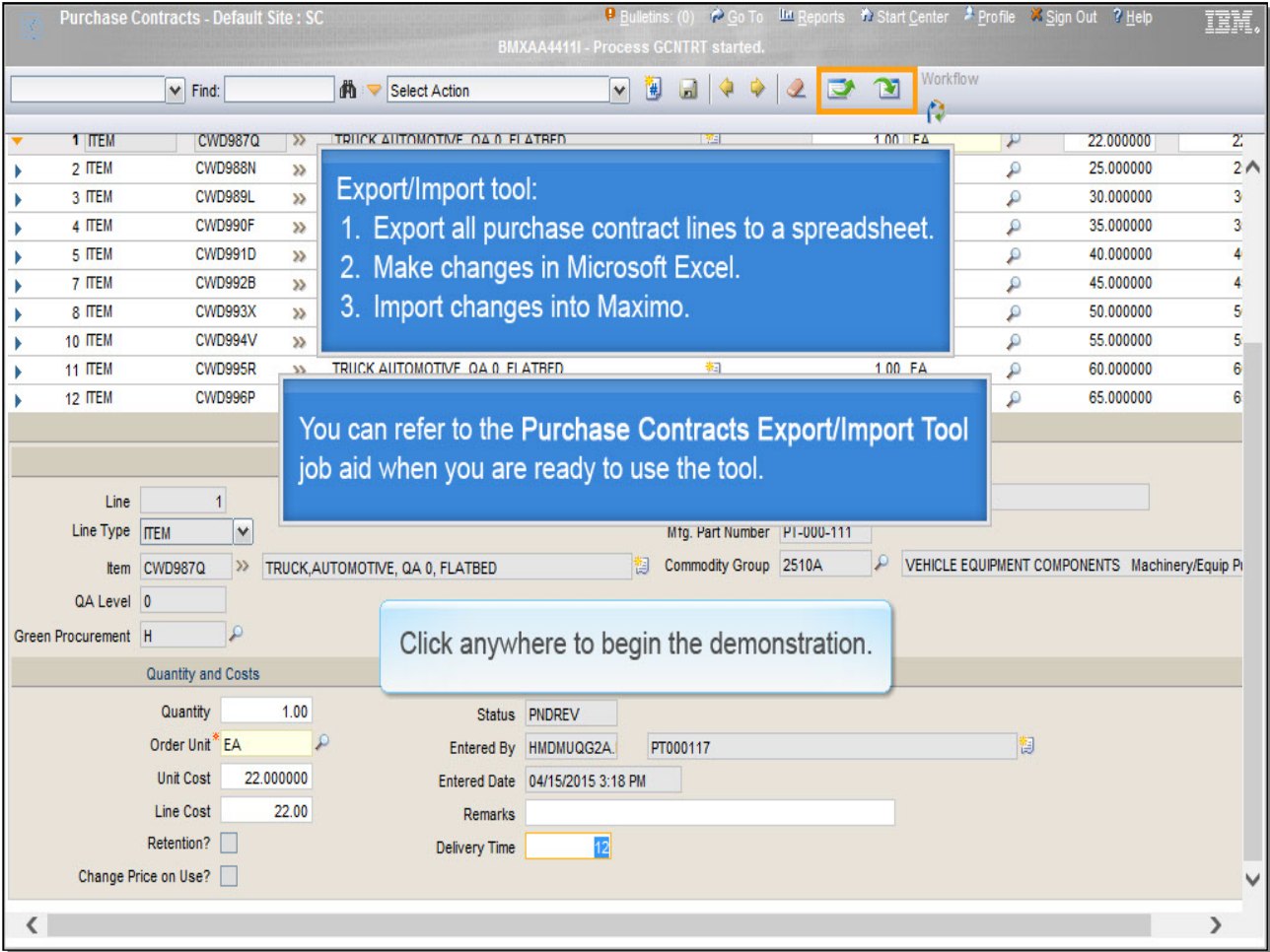
Slide notes

The workflow assignment has been routed to the Contract Manager, who will approve or reject the revision. You will be notified of the decision.

Text Captions

Click anywhere to continue.

Slide 123 - Using the Export/Import Tool



Slide notes

As mentioned earlier in this lesson, you can use the Export/Import tool to export all of the purchase contract lines to a spreadsheet, edit the information on your computer, and then import the data back into Maximo.

Although not difficult, this process consists of many steps. We won't step through the process as we have in other topics, but will present a demonstration instead. Each step is documented in the related job aid, which is available on the Supplier portal. You can refer to this job aid when you are ready to use this tool.

Click anywhere on the screen to begin the demonstration.

Text Captions

Click anywhere to begin the demonstration.

Slide 124 - Demonstration

Purchase Contracts - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

Contract 9552 Truck Parts Type TVA GENERAL

Revision 5 Update pricing and delivery time

Contract Code MATERIAL

Contract Lines Filter 1 - 10 of 10 Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

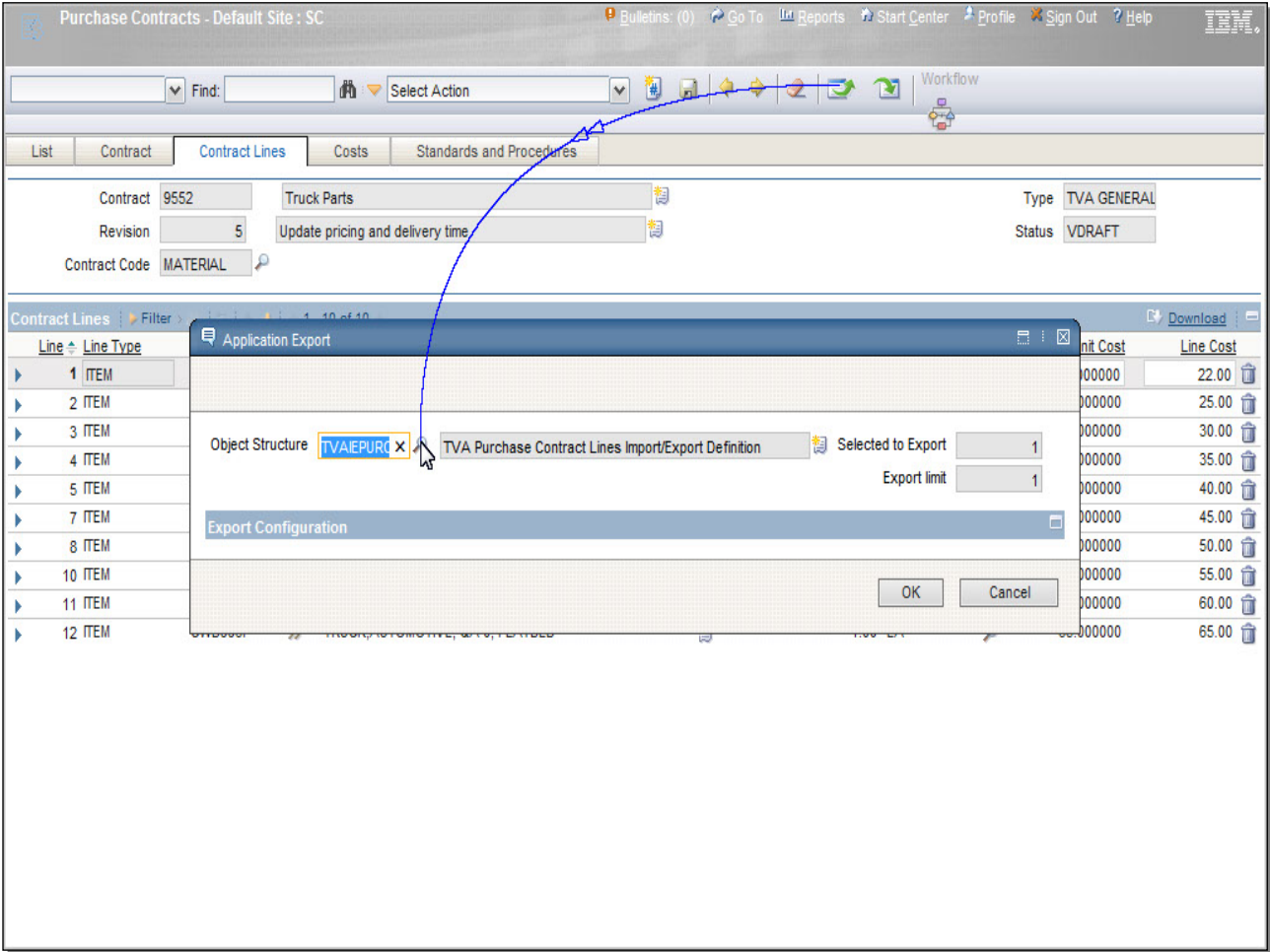
The Application Export icon is used to begin the export process.

Slide notes

Text Captions

The Application Export icon is used to begin the export process.

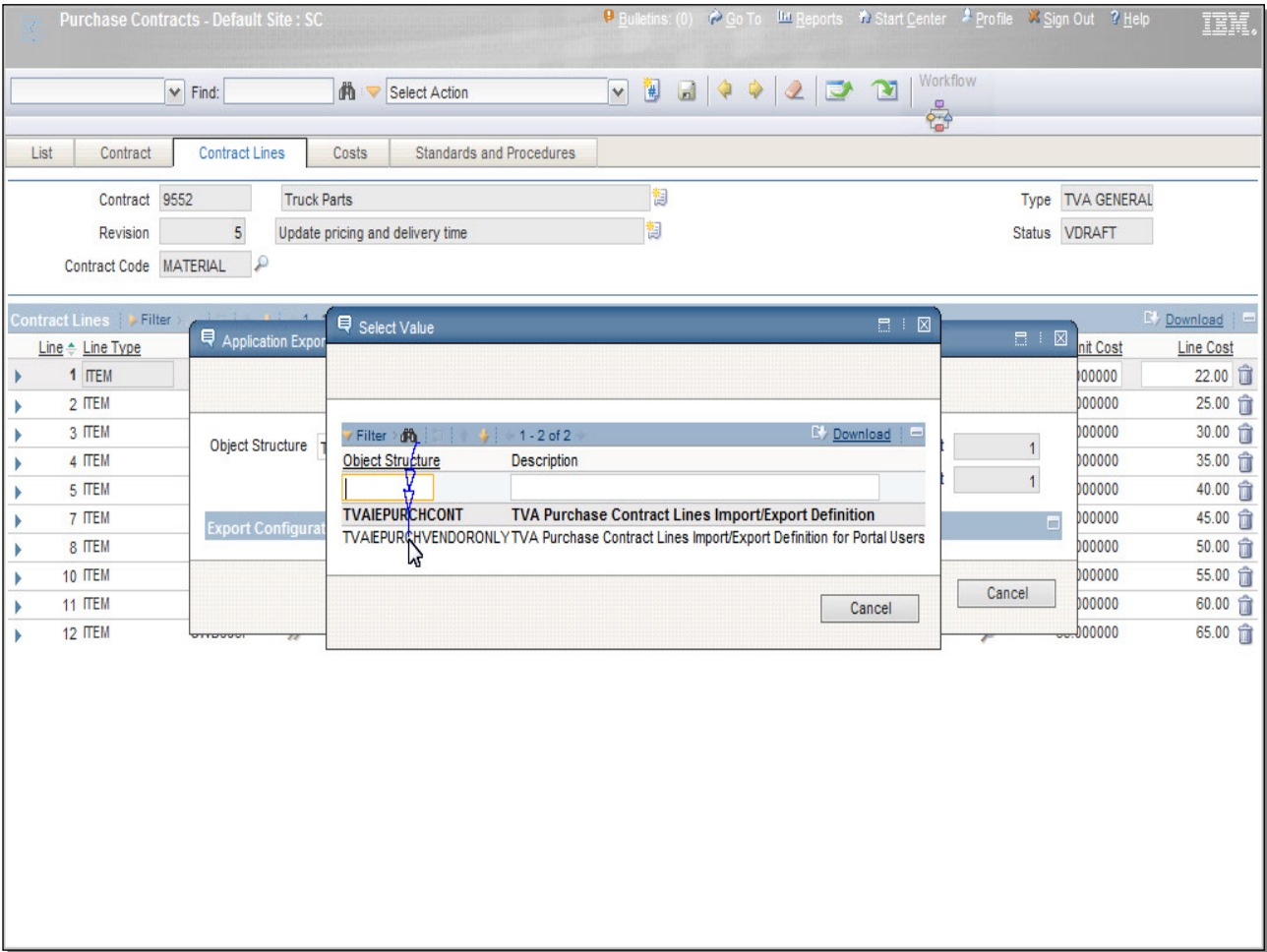
Slide 125 - Demo



Slide notes

Text Captions

Slide 126 - Demo



Slide notes

Text Captions

Slide 127 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL
Revision5Update pricing and delivery timeStatusVDRAFT
Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Unit Cost	Line Cost
1	ITEM	000000	22.00
2	ITEM	000000	25.00
3	ITEM	000000	30.00
4	ITEM	000000	35.00
5	ITEM	000000	40.00
7	ITEM	000000	45.00
8	ITEM	000000	50.00
10	ITEM	000000	55.00
11	ITEM	000000	60.00
12	ITEM	000000	65.00

Application Export

Object StructureTVAIEPURCTVA Purchase Contract Lines Import/Export Definition for PortSelected to Export1Export limit1

Export Configuration

OKCancel

Slide notes

Text Captions

Slide 128 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

The next step is to save the data to a file on your computer.

Click anywhere to continue.

Do you want to open or save TVAIEPURCHVENDORONLY1429129258858198196.dat from maxacp.tva.gov?

OpenSaveCancel

Slide notes

Text Captions

The next step is to save the data to a file on your computer.

Click anywhere to continue.

Slide 129 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Do you want to open or save TVAIEPURCHVENDORONLY1429129258858198196.dat from maxacp.tva.gov?

OpenSaveCancel

Slide notes

Text Captions

Slide 130 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)

Go To

Reports

Start Center

Profile

Sign Out

Help

IBM

Find:

Select Action

Workflow

List

Contract

Contract Lines

Costs

Standards and Procedures

Contract

9552

Truck Parts

Type

TVA GENERAL

Revision

5

Update pricing and delivery time

Status

VDRAFT

Contract Code

MATERIAL

Contract Lines

Filter

1 - 10 of 10

Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Do you want to open or save TVAIEPURCHVENDORONLY1429129258858198196.dat from maxacp.ta

Save

Save as

Save and open

Open

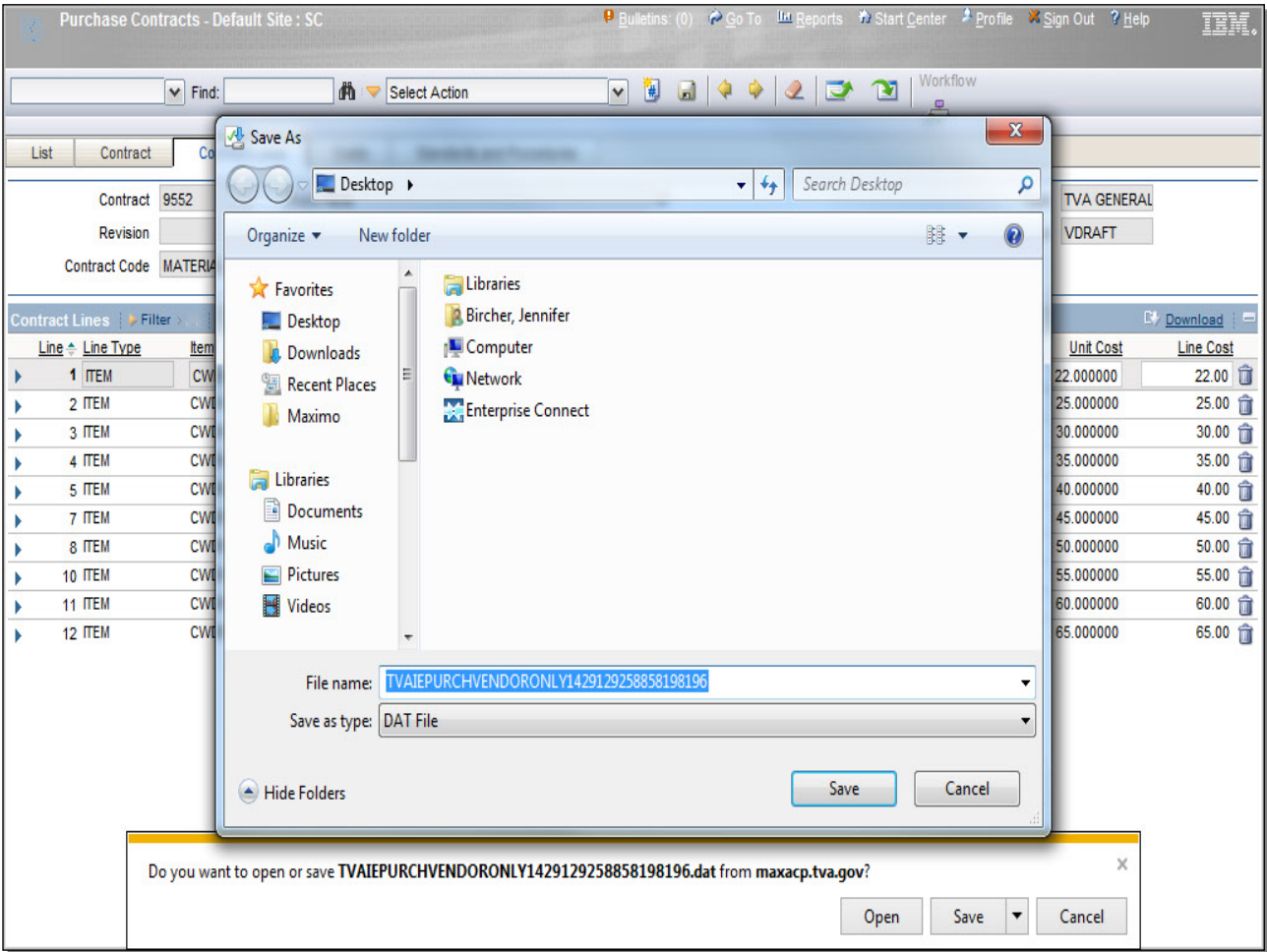
Save

Cancel

Slide notes

Text Captions

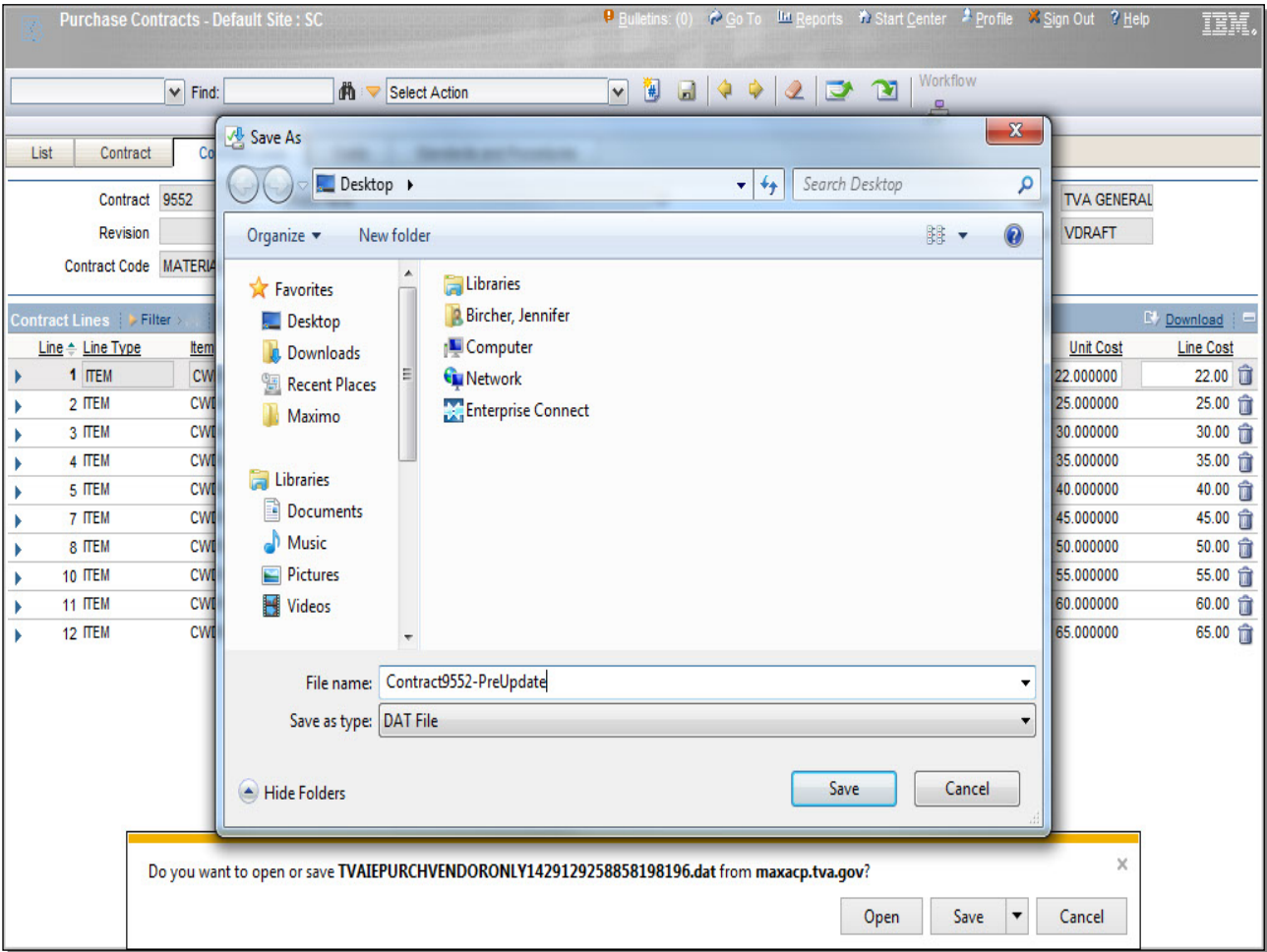
Slide 131 - Demo



Slide notes

Text Captions

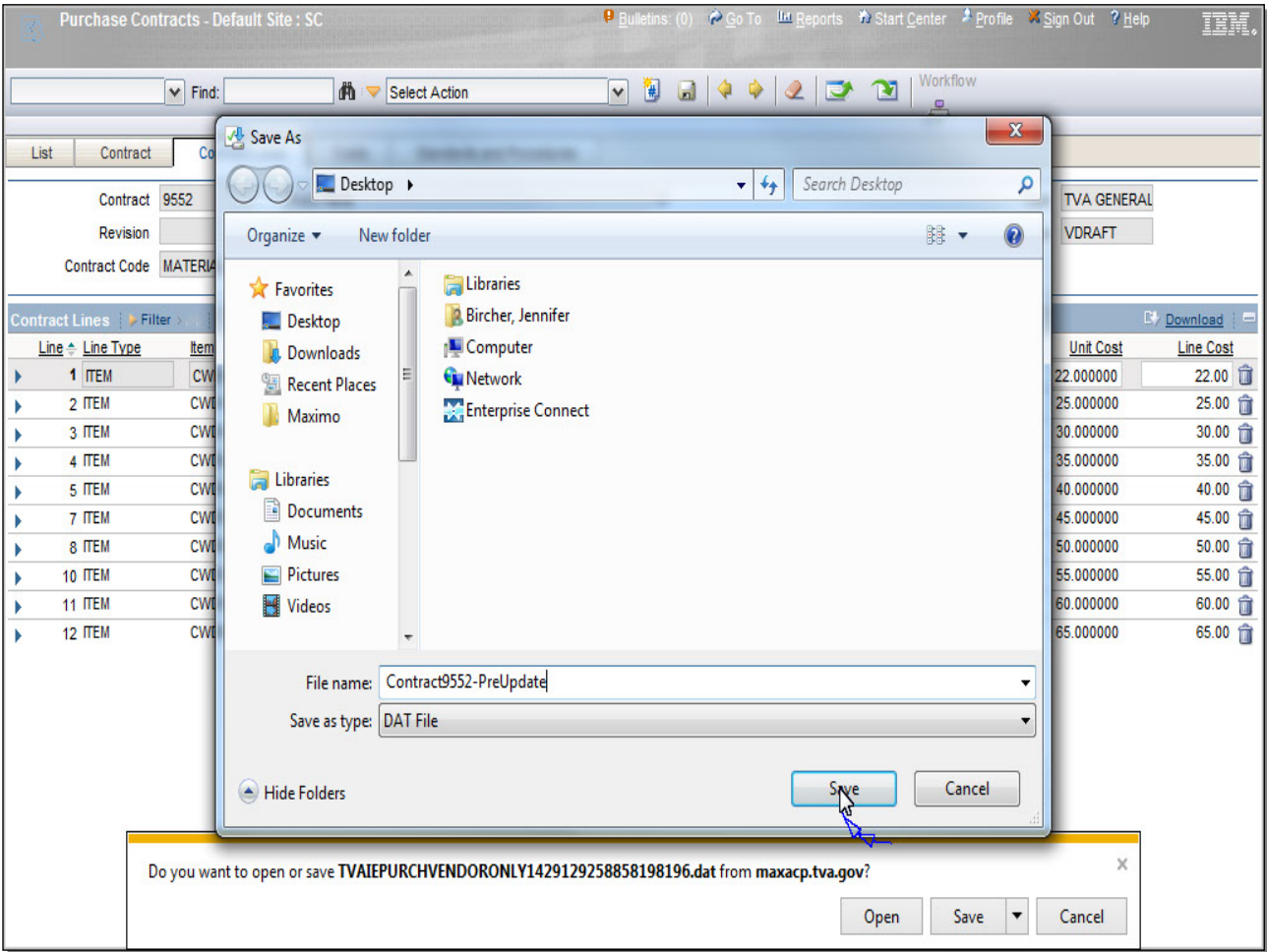
Slide 132 - Demo



Slide notes

Text Captions

Slide 133 - Demo



Slide notes

Text Captions

Slide 134 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Now that the file has been saved, the next step is to open Microsoft Excel.

Click anywhere to continue.

The Contract9552-PreUpdate.dat download has completed.

OpenOpen folderView downloads

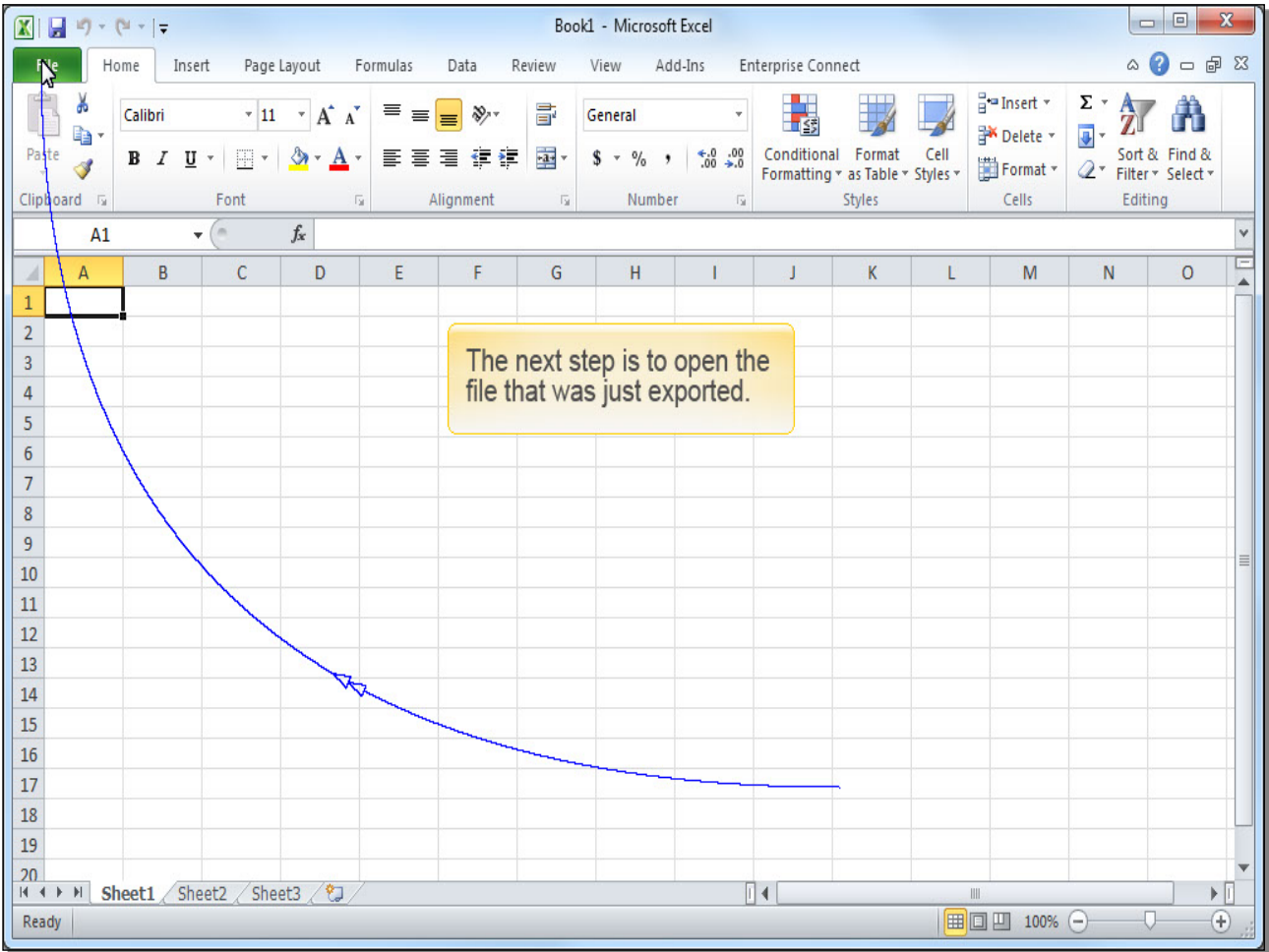
Slide notes

Text Captions

Now that the file has been saved, the next step is to open Microsoft Excel.

Click anywhere to continue.

Slide 135 - Demo

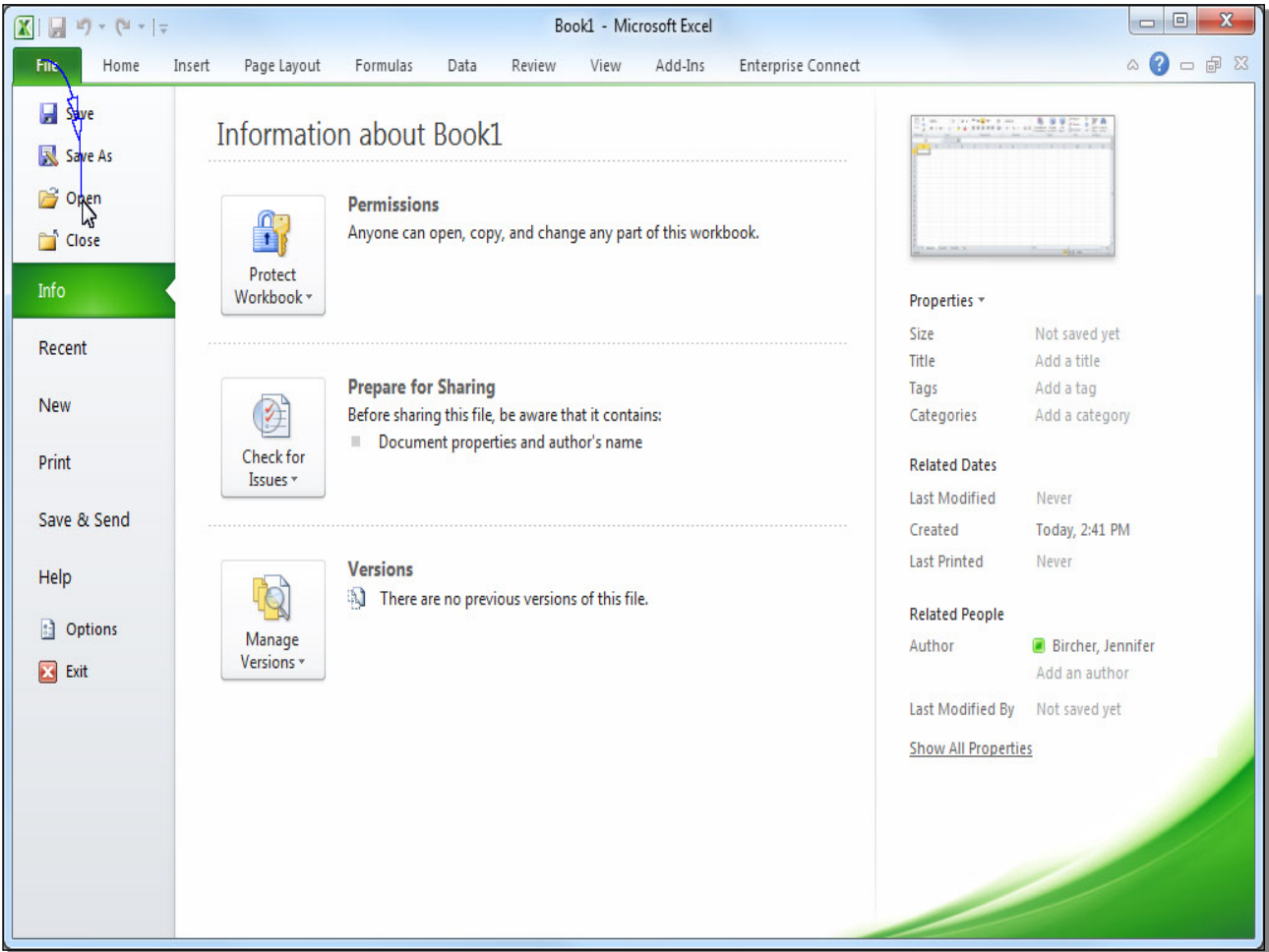


Slide notes

Text Captions

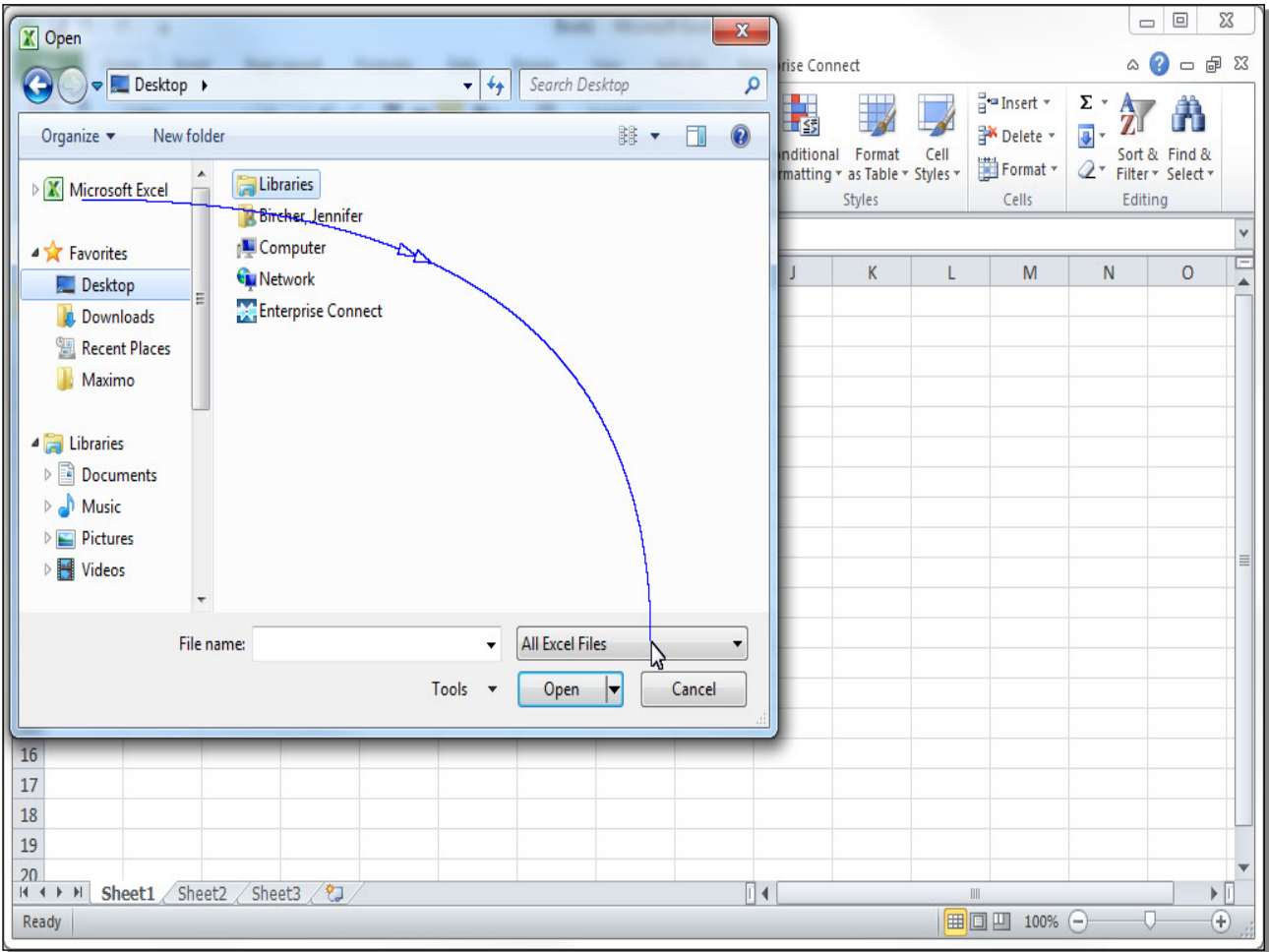
The next step is to open the file that was just exported.

Slide 136 - Demo



Slide notes
Text Captions

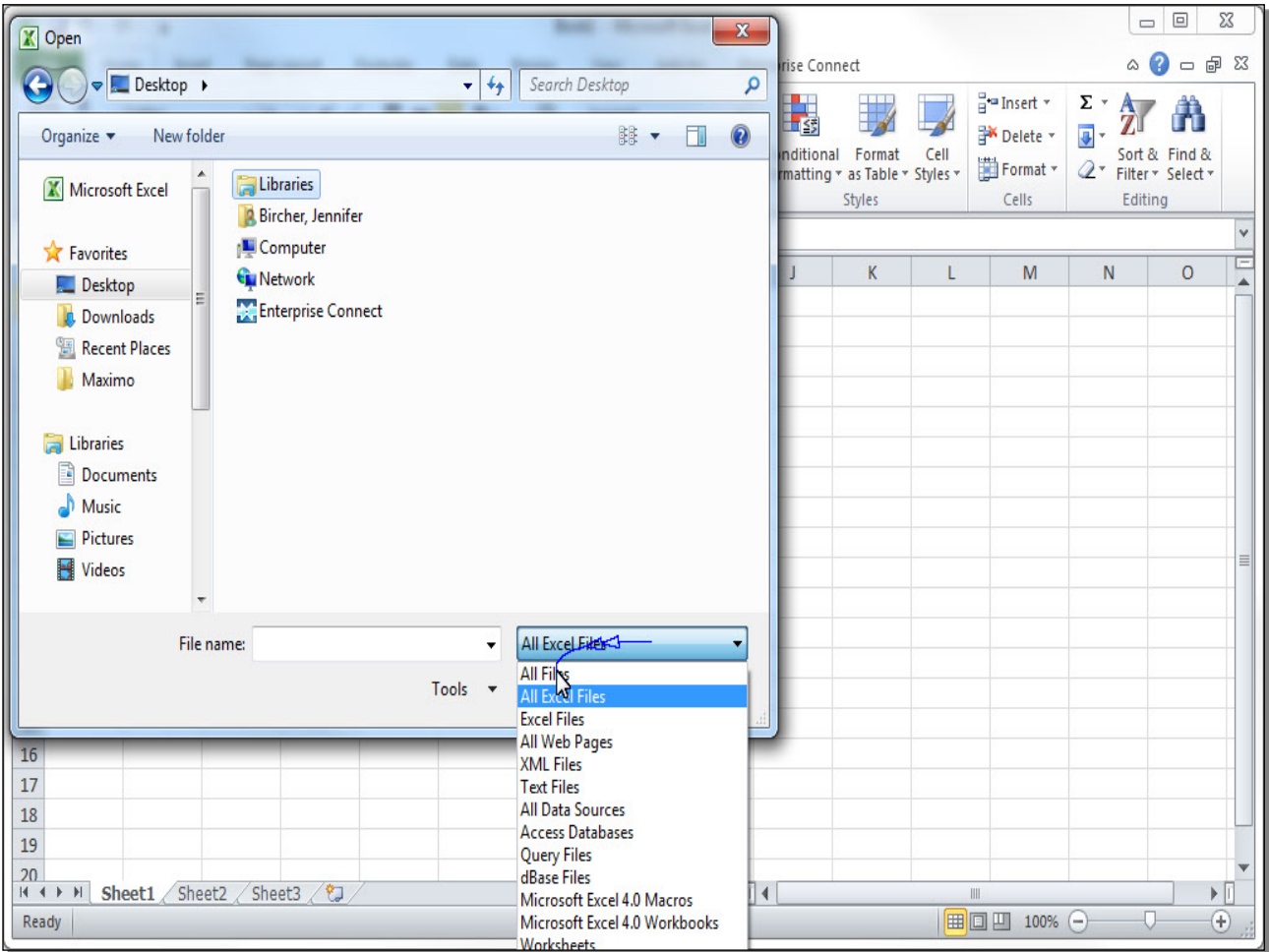
Slide 137 - Demo



Slide notes

Text Captions

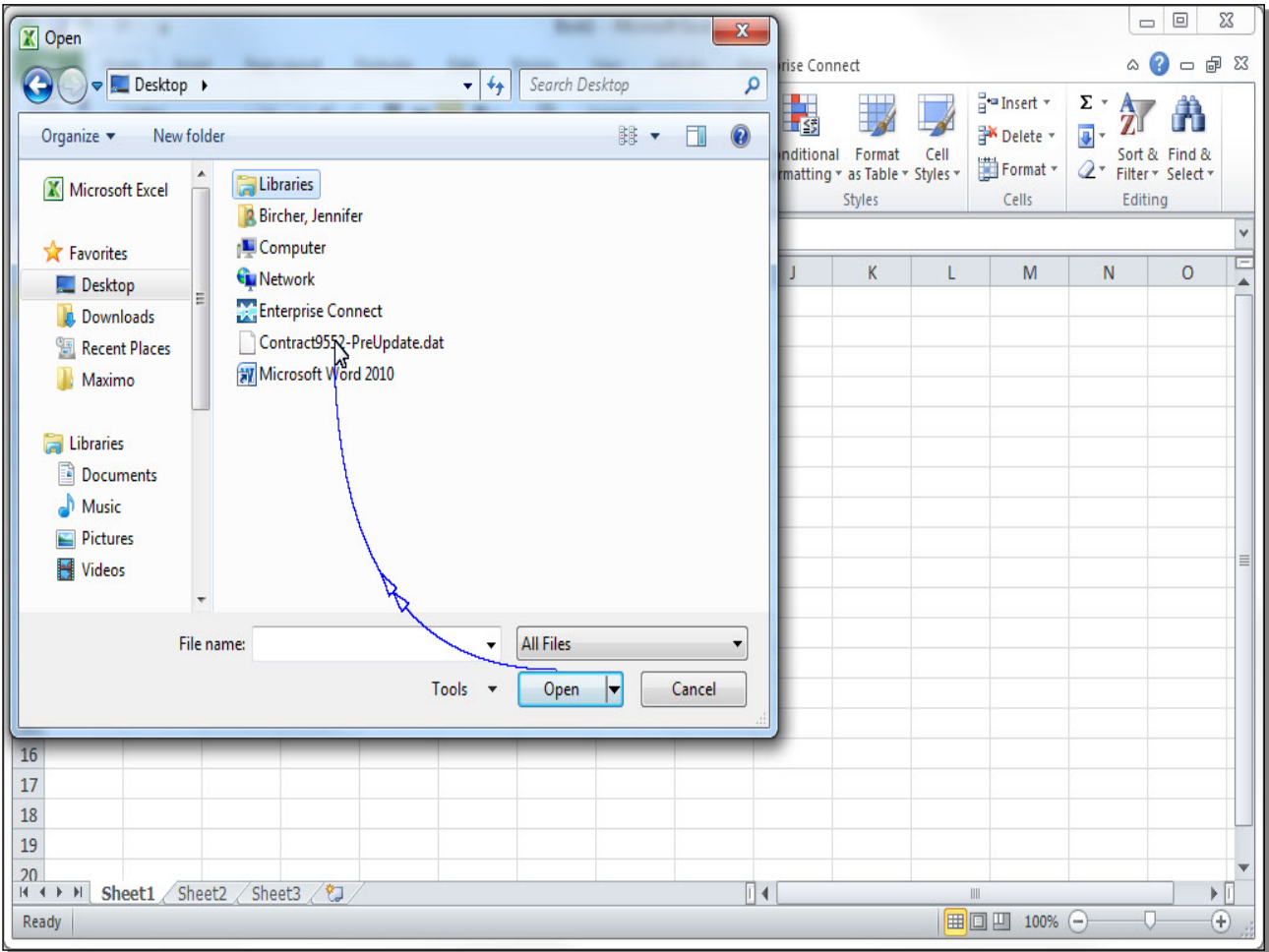
Slide 138 - Demo



Slide notes

Text Captions

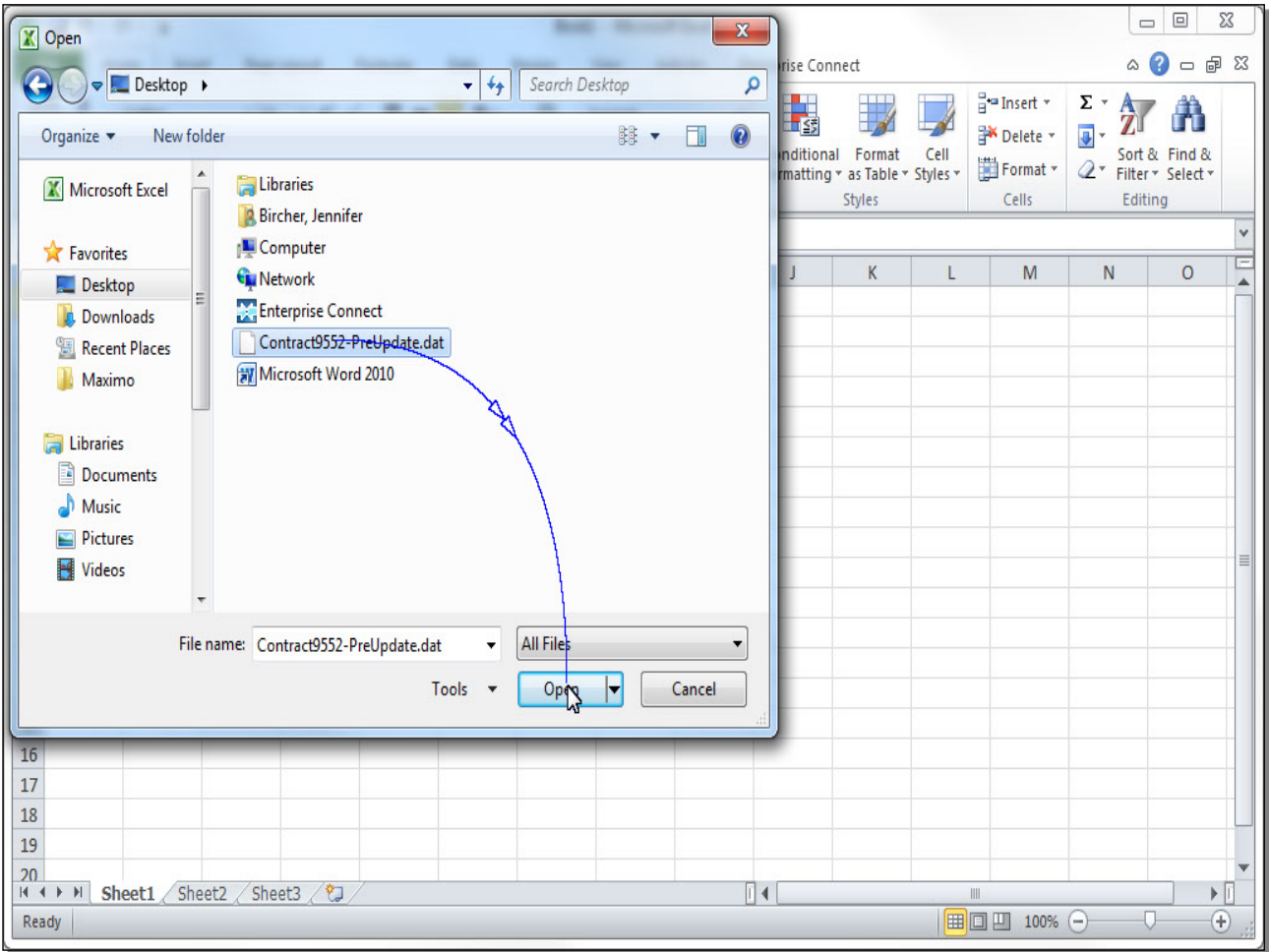
Slide 139 - Demo



Slide notes

Text Captions

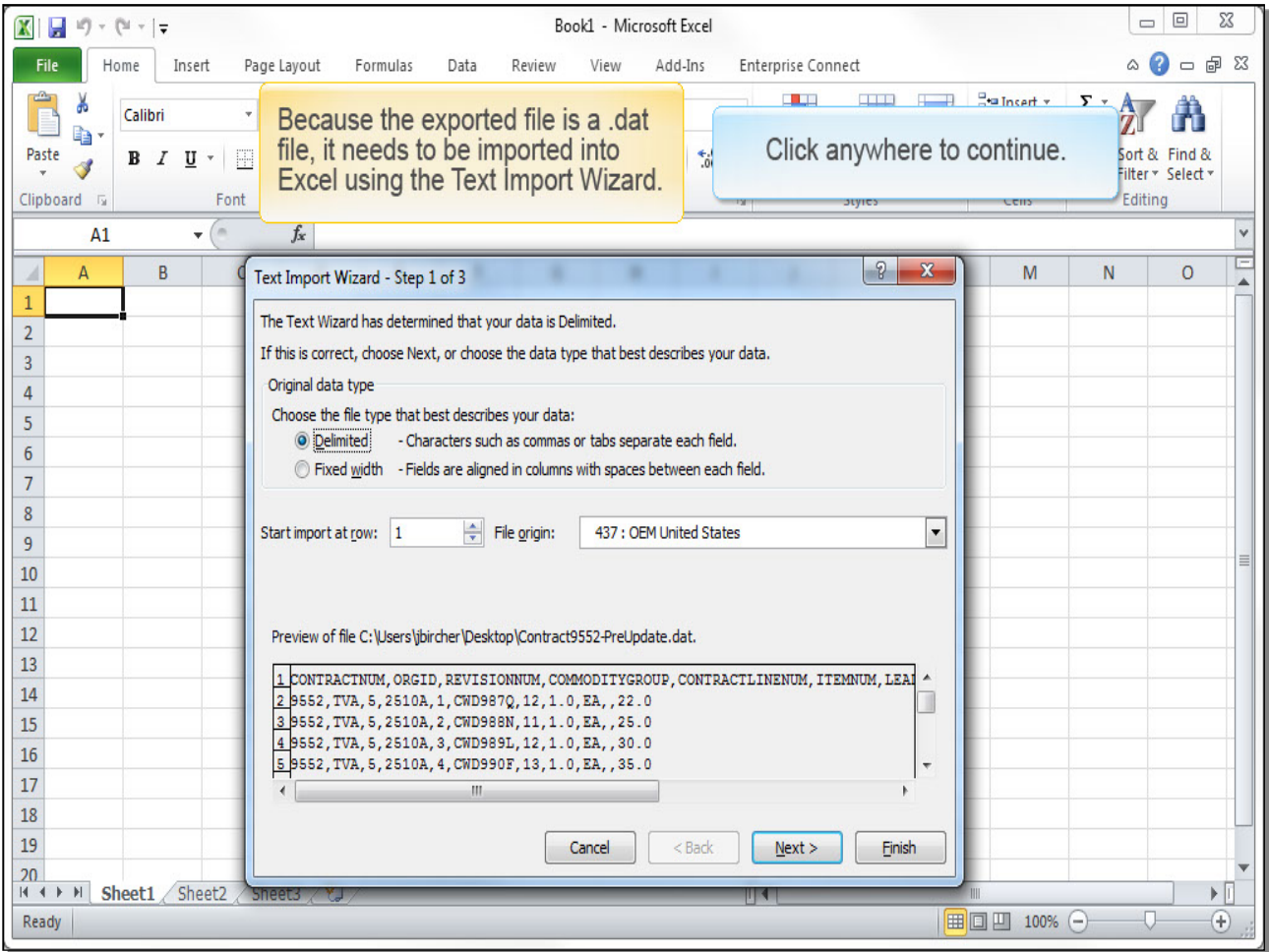
Slide 140 - Demo



Slide notes

Text Captions

Slide 141 - Demo



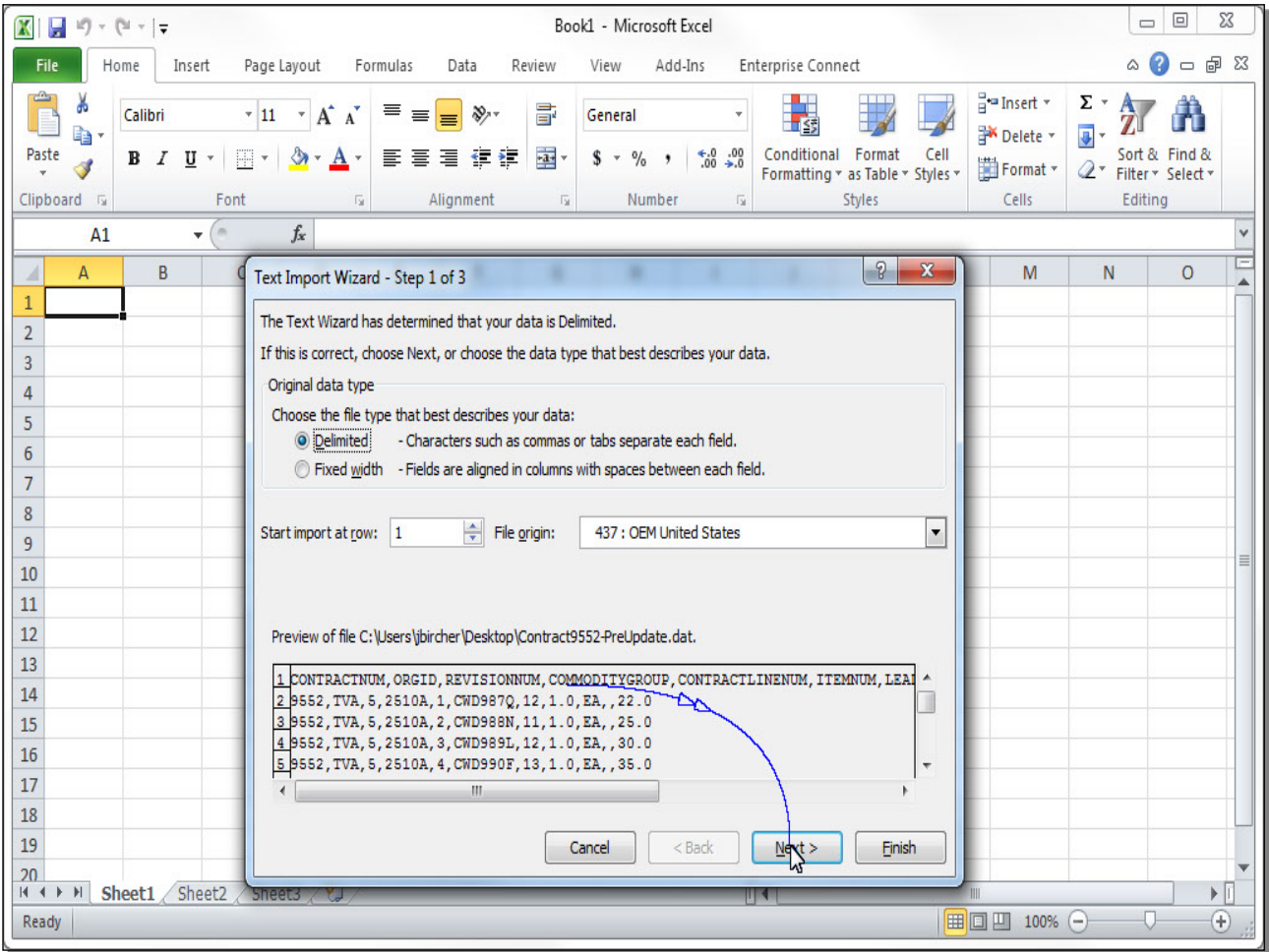
Slide notes

Text Captions

Because the exported file is a .dat file, it needs to be imported into Excel using the Text Import Wizard.

Click anywhere to continue.

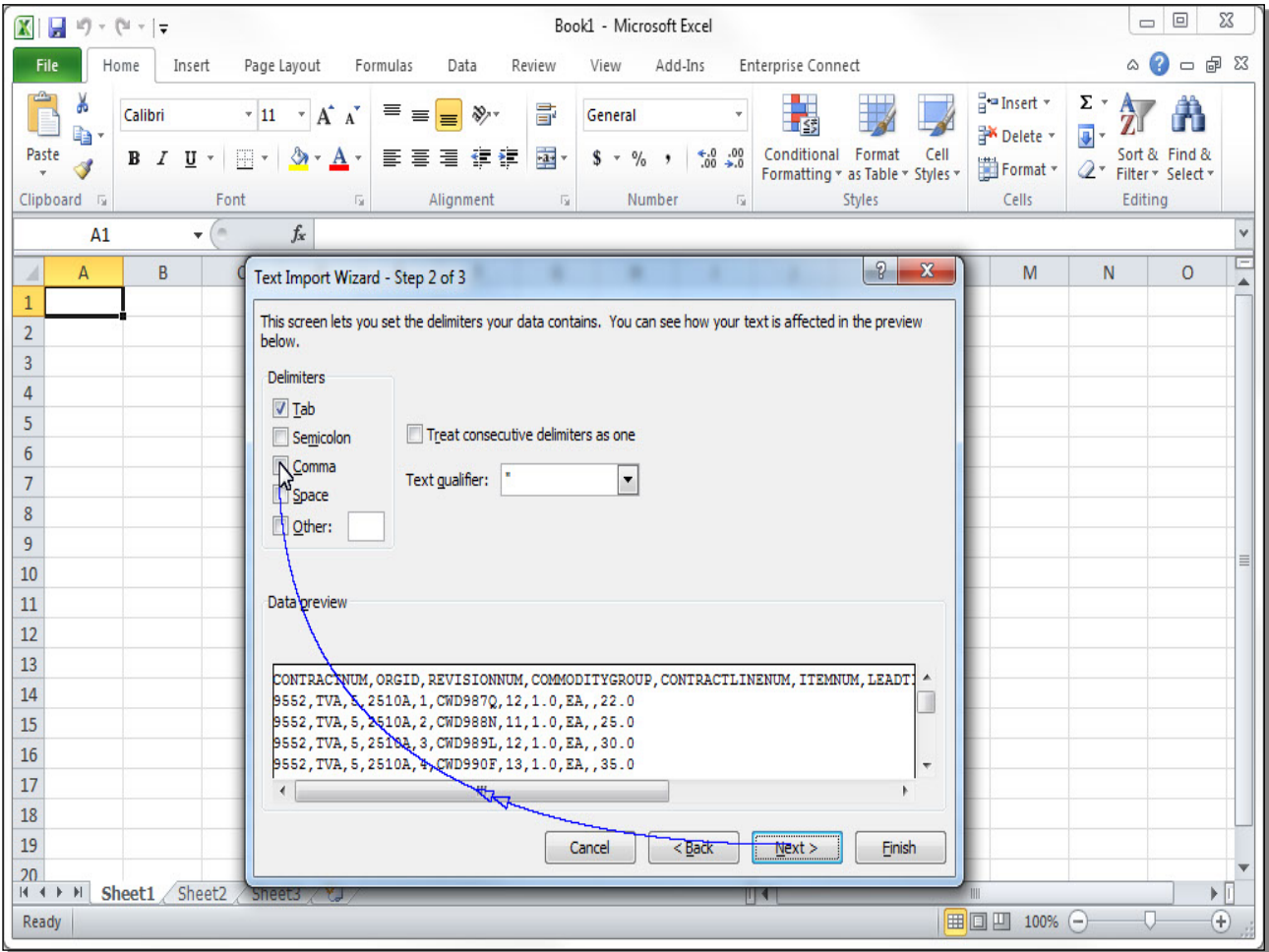
Slide 142 - Demo



Slide notes

Text Captions

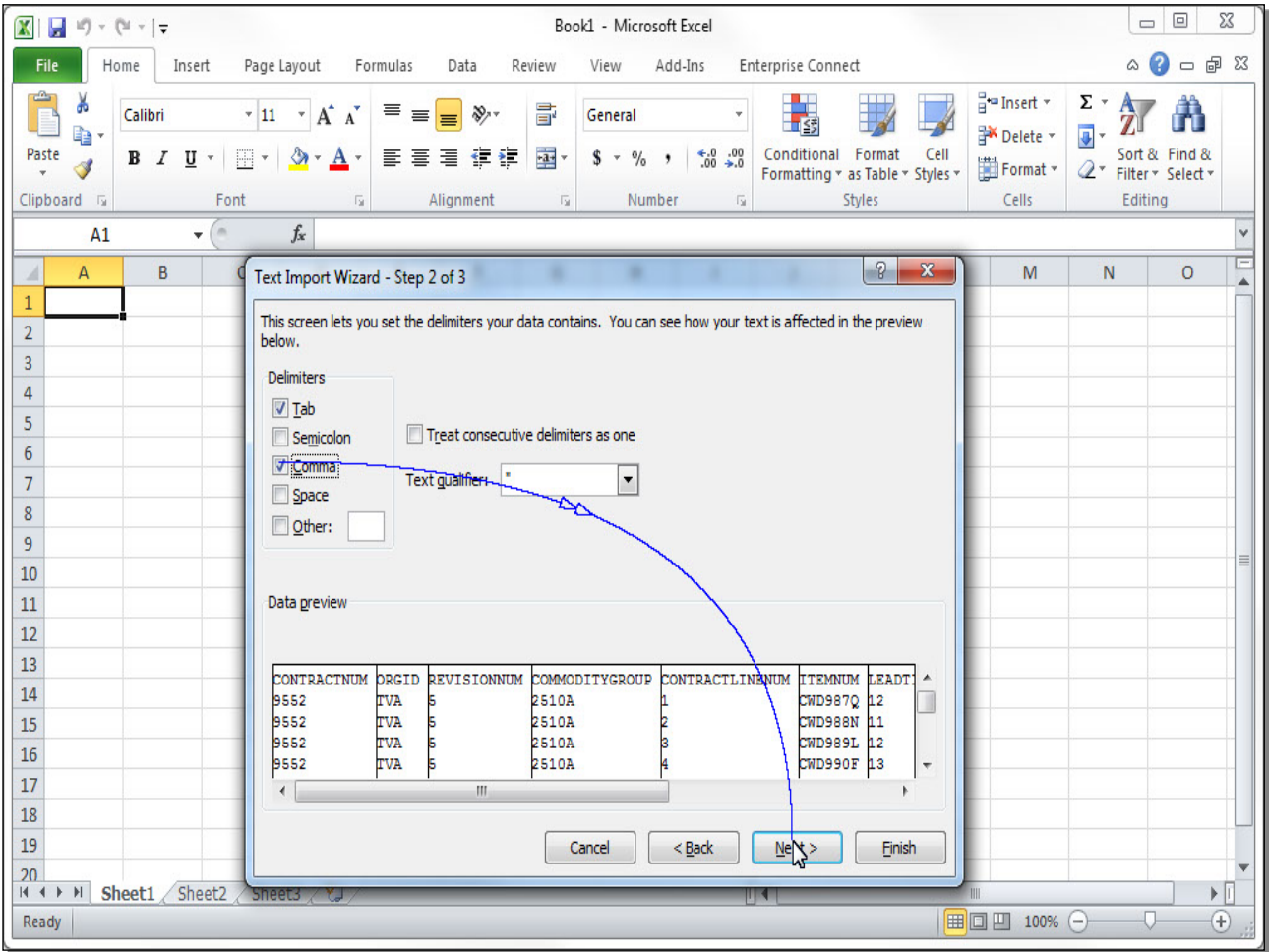
Slide 143 - Demo



Slide notes

Text Captions

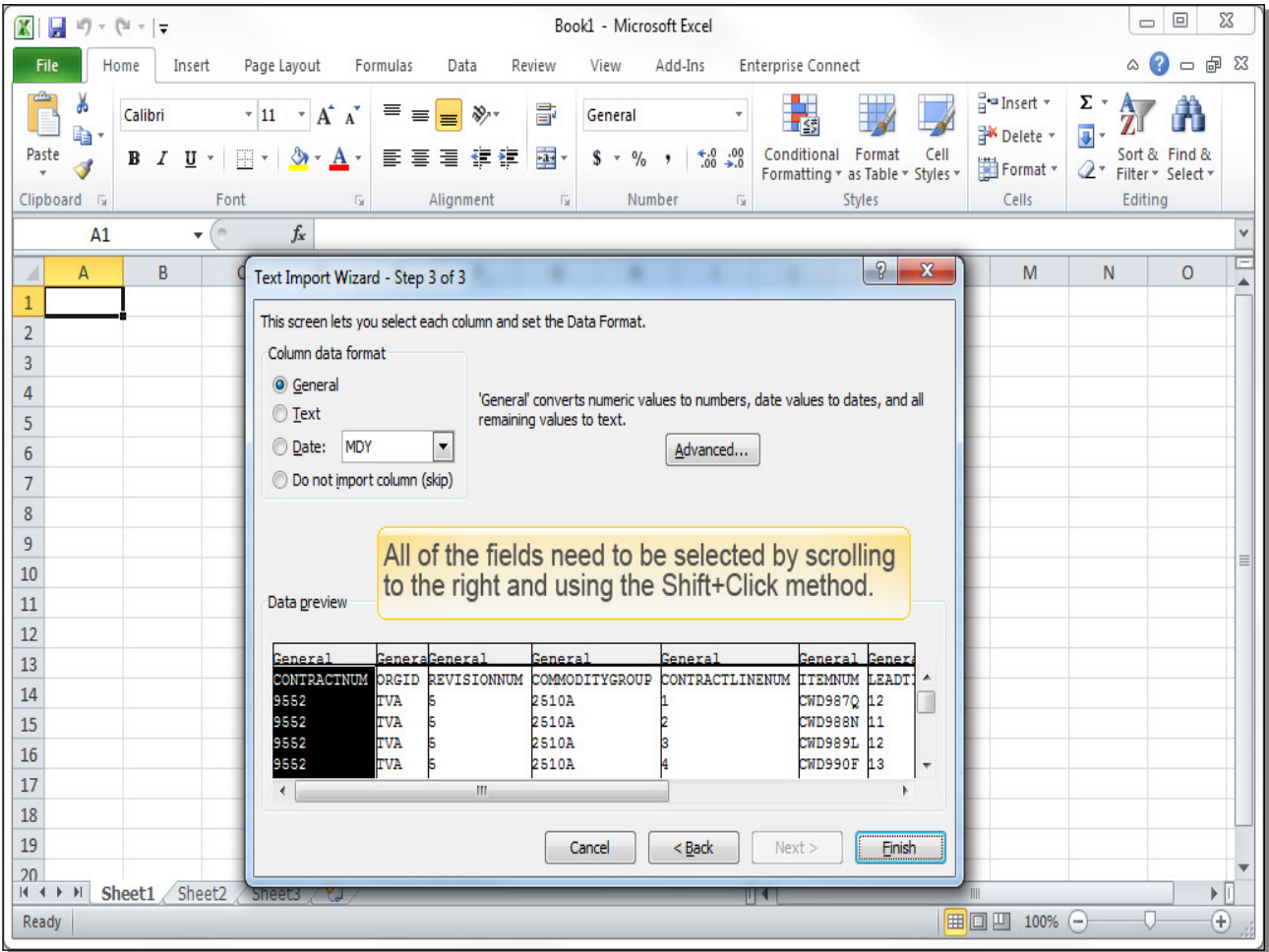
Slide 144 - Demo



Slide notes

Text Captions

Slide 145 - Demo

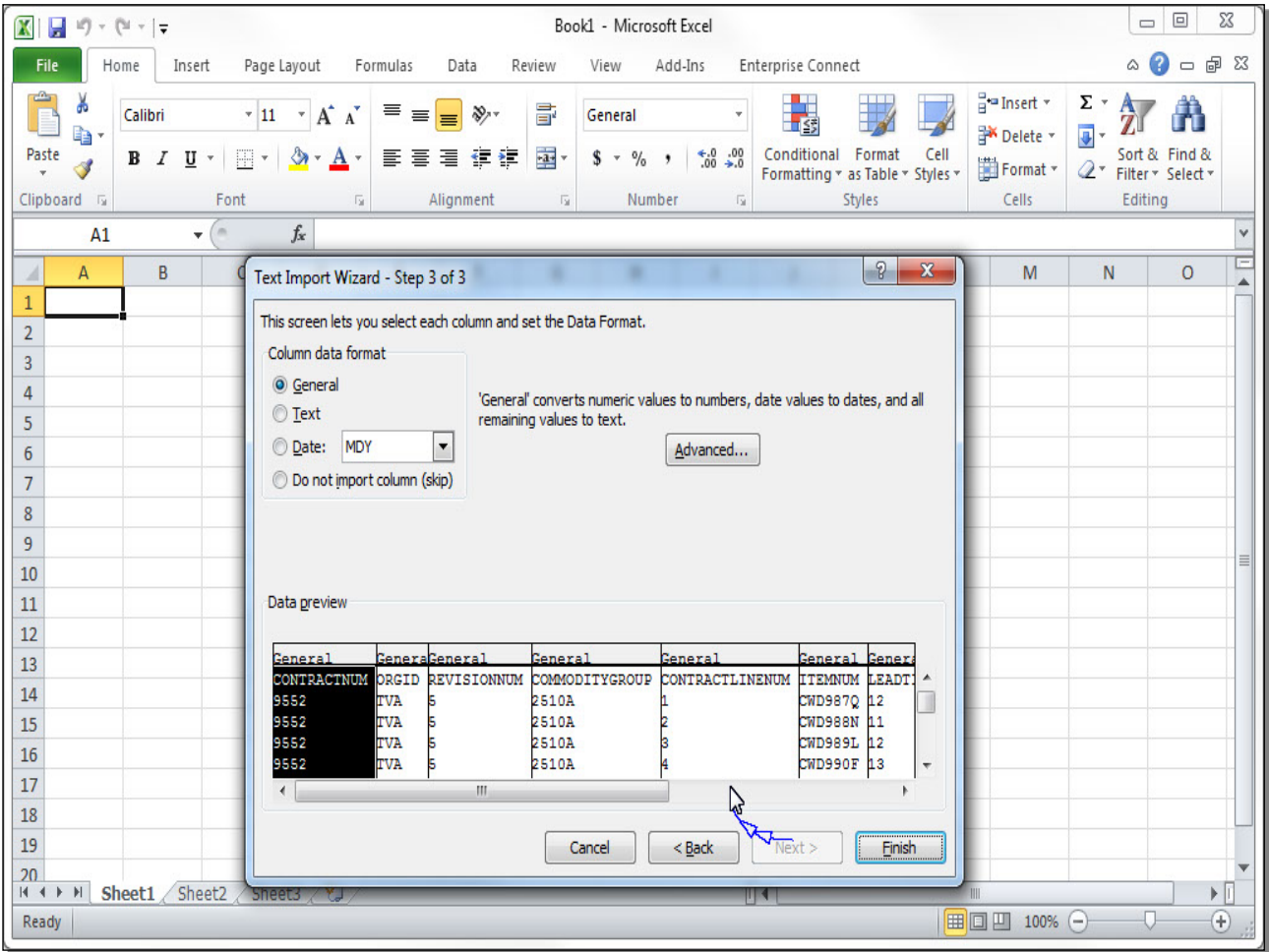


Slide notes

Text Captions

All of the fields need to be selected by scrolling to the right and using the Shift+Click method.

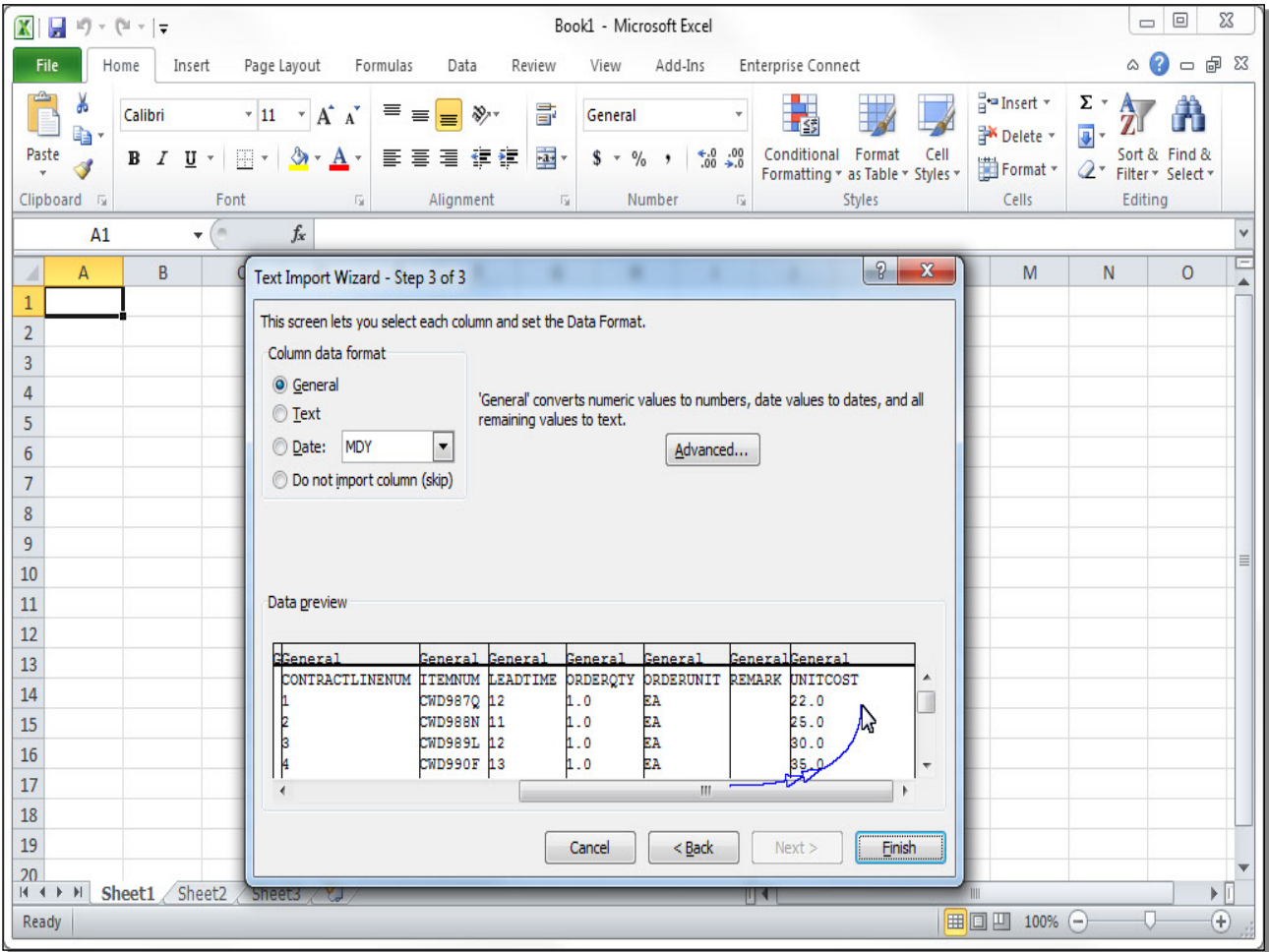
Slide 146 - Demo



Slide notes

Text Captions

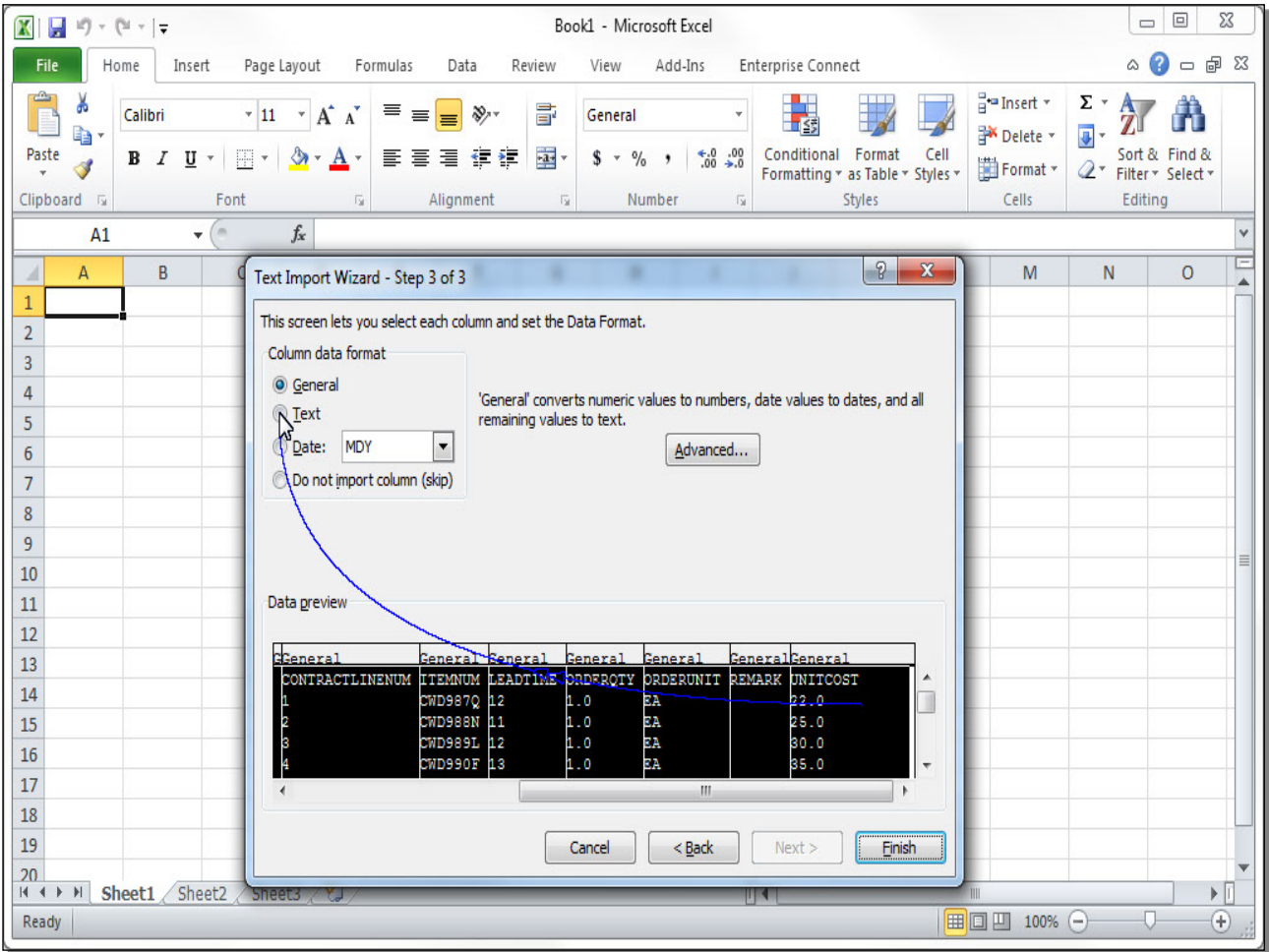
Slide 147 - Demo



Slide notes

Text Captions

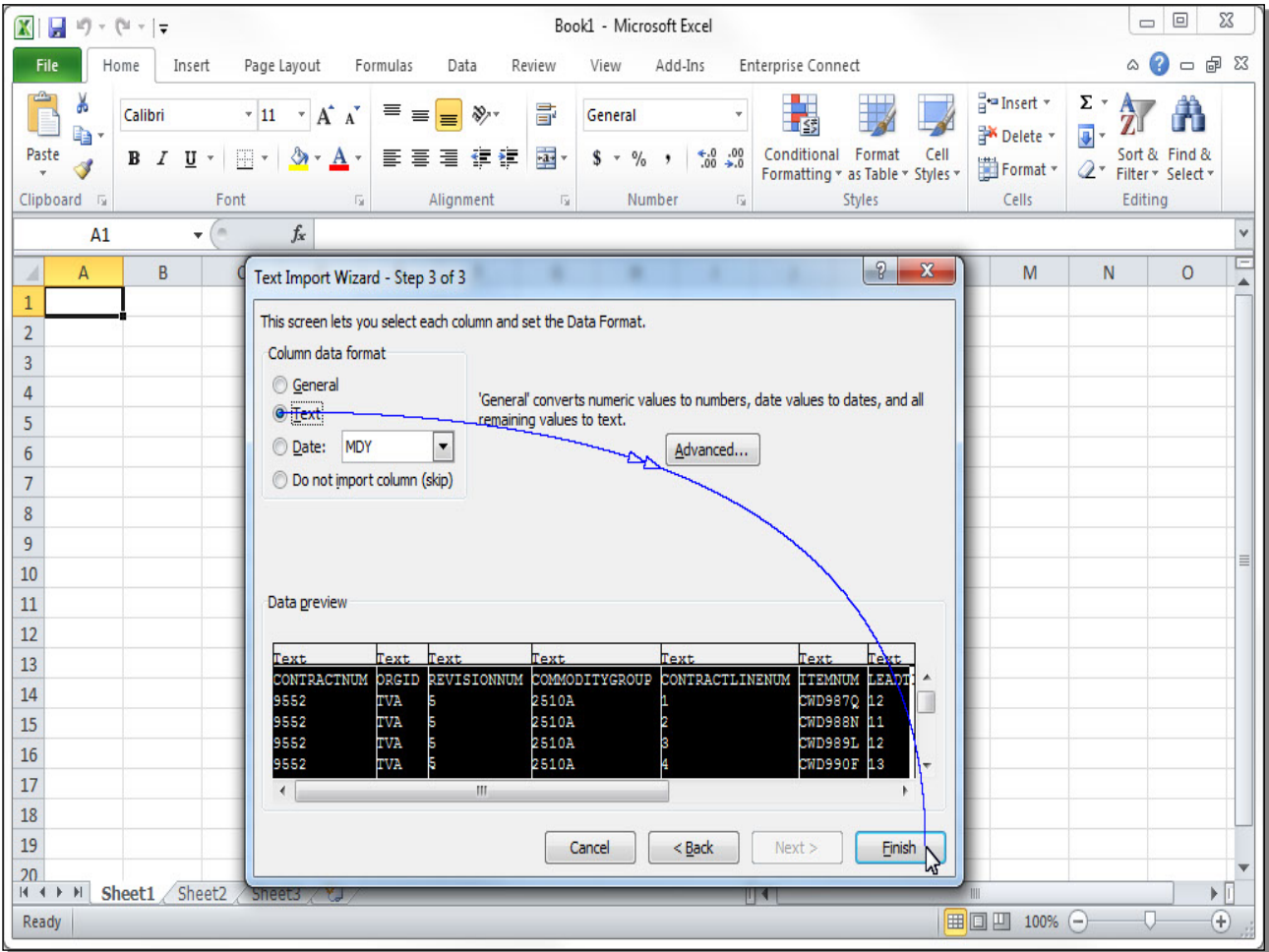
Slide 148 - Demo



Slide notes

Text Captions

Slide 149 - Demo



Slide notes

Text Captions

Slide 150 - Demo

Contract9552-PreUpdate - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Enterprise Connect

Clipboard Font Alignment Number Styles Cells Editing

A1 CONTRACTNUM

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	19	1.0	EA		65.0				

You now see the data from the purchase contract in spreadsheet format.

The next step is to edit the values. We'll change just two values in the last line.

Click anywhere to continue.

Contract9552-PreUpdate

Ready

Slide notes

Text Captions

You now see the data from the purchase contract in spreadsheet format.

The next step is to edit the values.

We'll change just two values in the last line.

Click anywhere to continue.

Slide 151 - Demo

Contract9552-PreUpdate - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Enterprise Connect

Clipboard Font Alignment Number Styles Cells Editing

A1 CONTRACTNUM

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	19	1.0	EA		65.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Contract9552-PreUpdate

Ready

100%

Slide notes

Text Captions

Slide 152 - Demo

Contract9552-PreUpdate - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	19	1.0	EA		65.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Slide notes

Text Captions

Slide 153 - Demo

Contract9552-PreUpdate - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		65.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Slide notes

Text Captions

Slide 154 - Demo

Contract9552-PreUpdate - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Enterprise Connect

Clipboard Font Alignment Number Styles Cells Editing

G11 X ✓ fx 21

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		65.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Contract9552-PreUpdate

Enter

100%

Slide notes

Text Captions

Slide 155 - Demo

Contract9552-PreUpdate - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		65.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Slide notes

Text Captions

Slide 156 - Demo

Contract9552-PreUpdate - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		70.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Slide notes

Text Captions

Slide 157 - Demo

Contract9552-PreUpdate - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Enterprise Connect

Clipboard Font Alignment Number Styles Cells Editing

K11 70.0

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		70.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Contract9552-PreUpdate

Enter

100%

Slide notes

Text Captions

Slide 158 - Demo

The screenshot shows the Microsoft Excel interface with the file 'Contract9552-PreUpdate'. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQTY	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		70.0				

The next step is to save the spreadsheet as a Comma Delimited (.csv) file.

Click anywhere to continue.

Slide notes

Text Captions

The next step is to save the spreadsheet as a Comma Delimited (.csv) file.

Click anywhere to continue.

Slide 159 - Demo

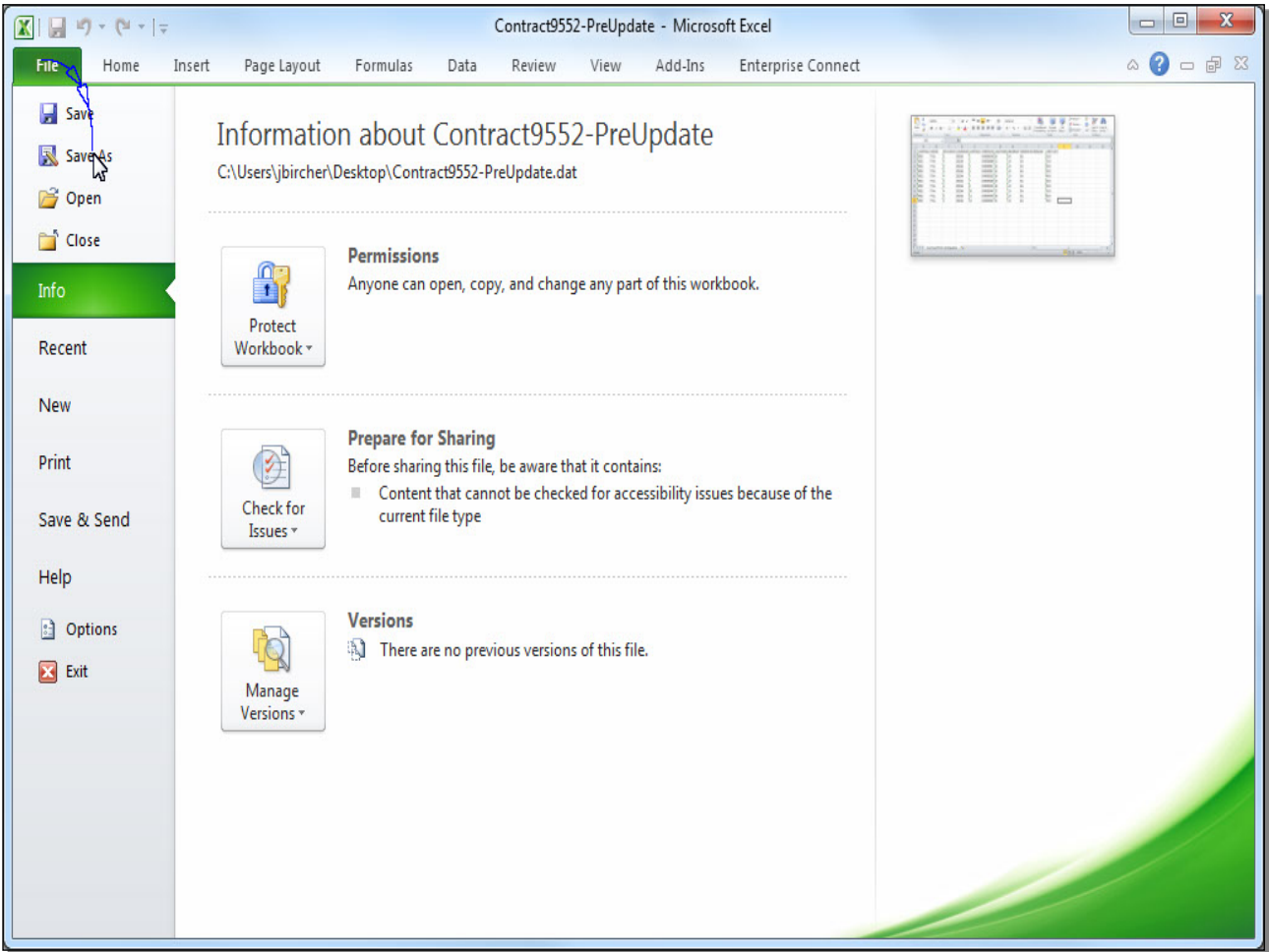
Contract9552-PreUpdate - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		70.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Slide notes

Text Captions

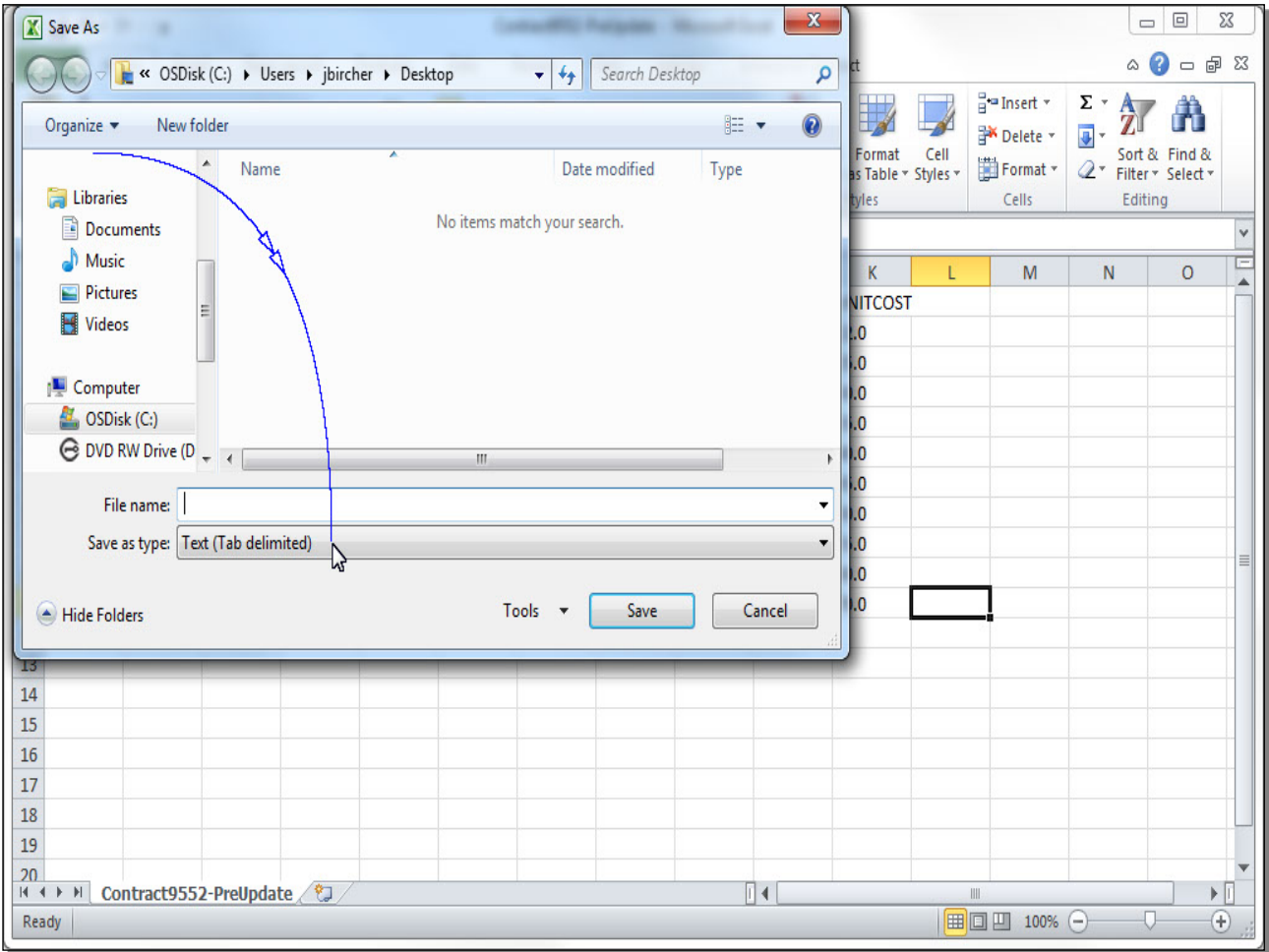
Slide 160 - Demo



Slide notes

Text Captions

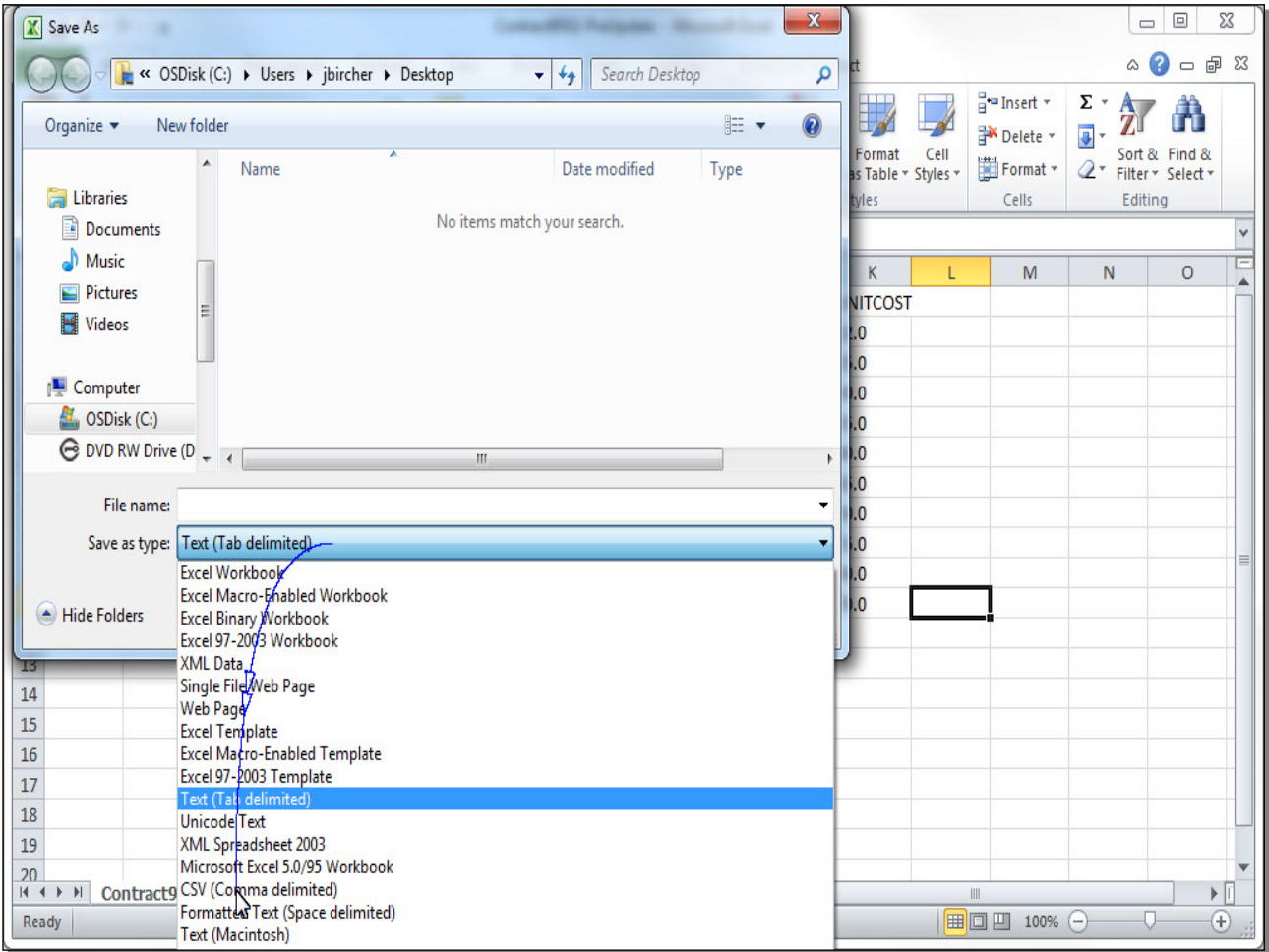
Slide 161 - Demo



Slide notes

Text Captions

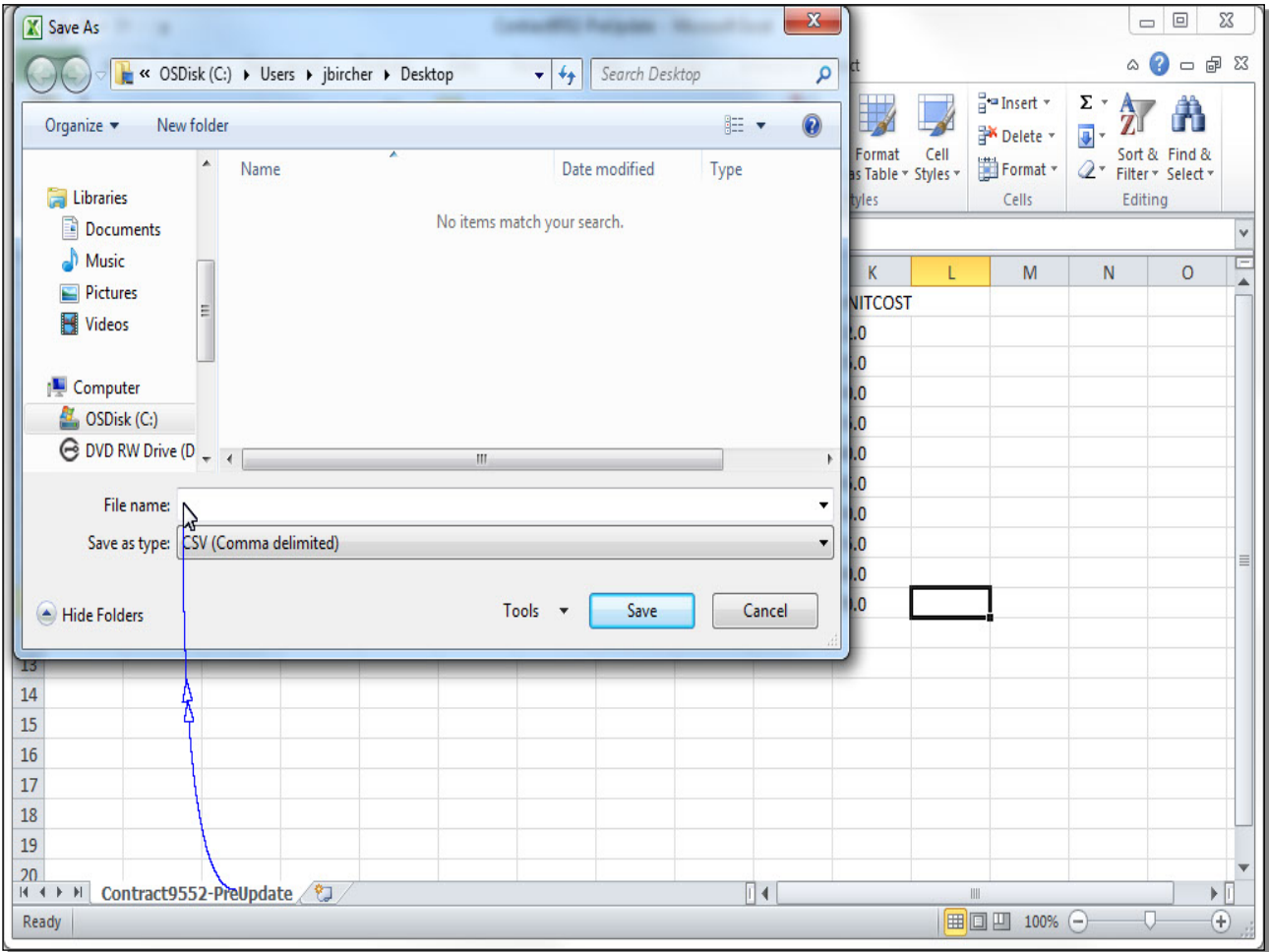
Slide 162 - Demo



Slide notes

Text Captions

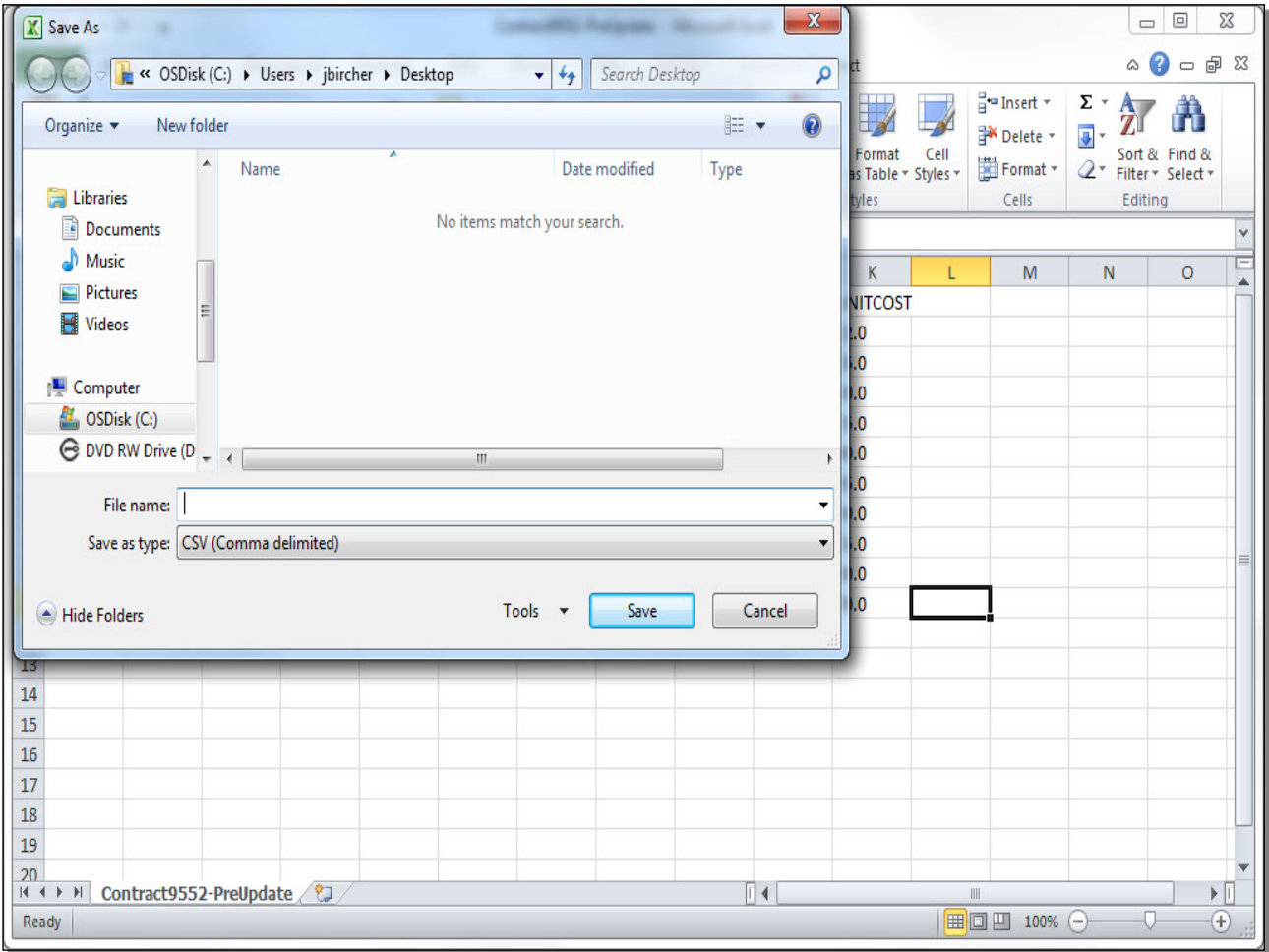
Slide 163 - Demo



Slide notes

Text Captions

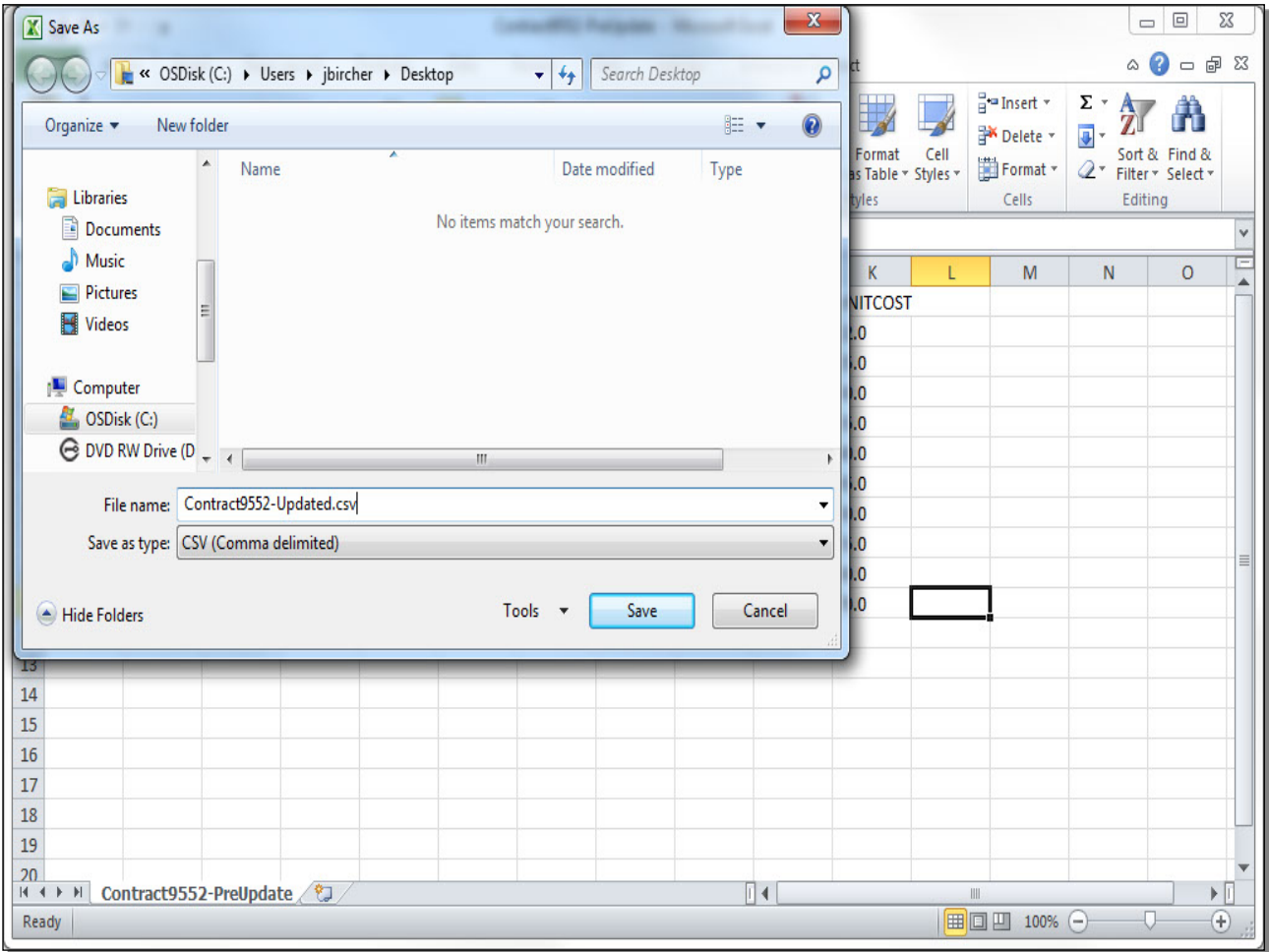
Slide 164 - Demo



Slide notes

Text Captions

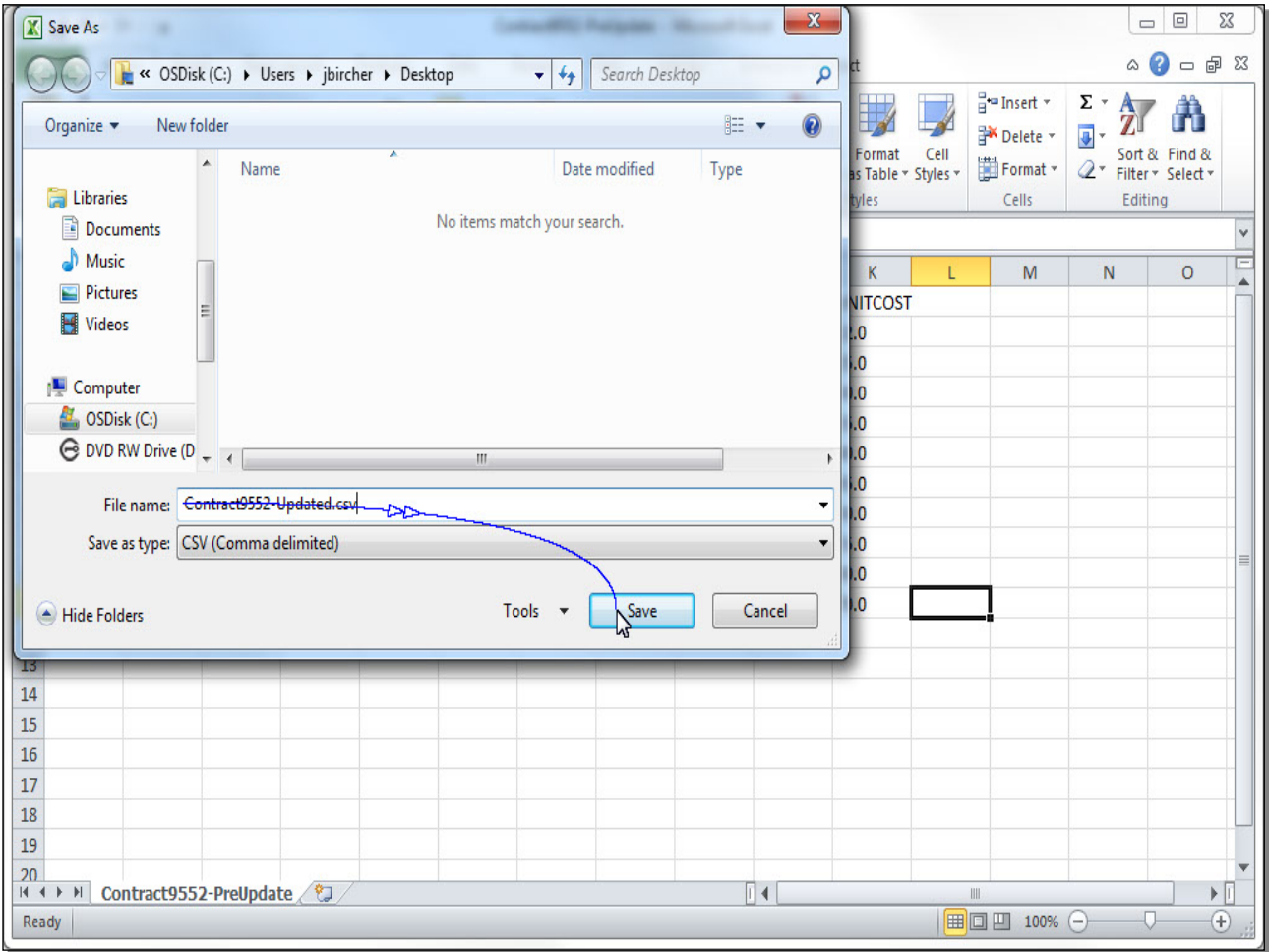
Slide 165 - Demo



Slide notes

Text Captions

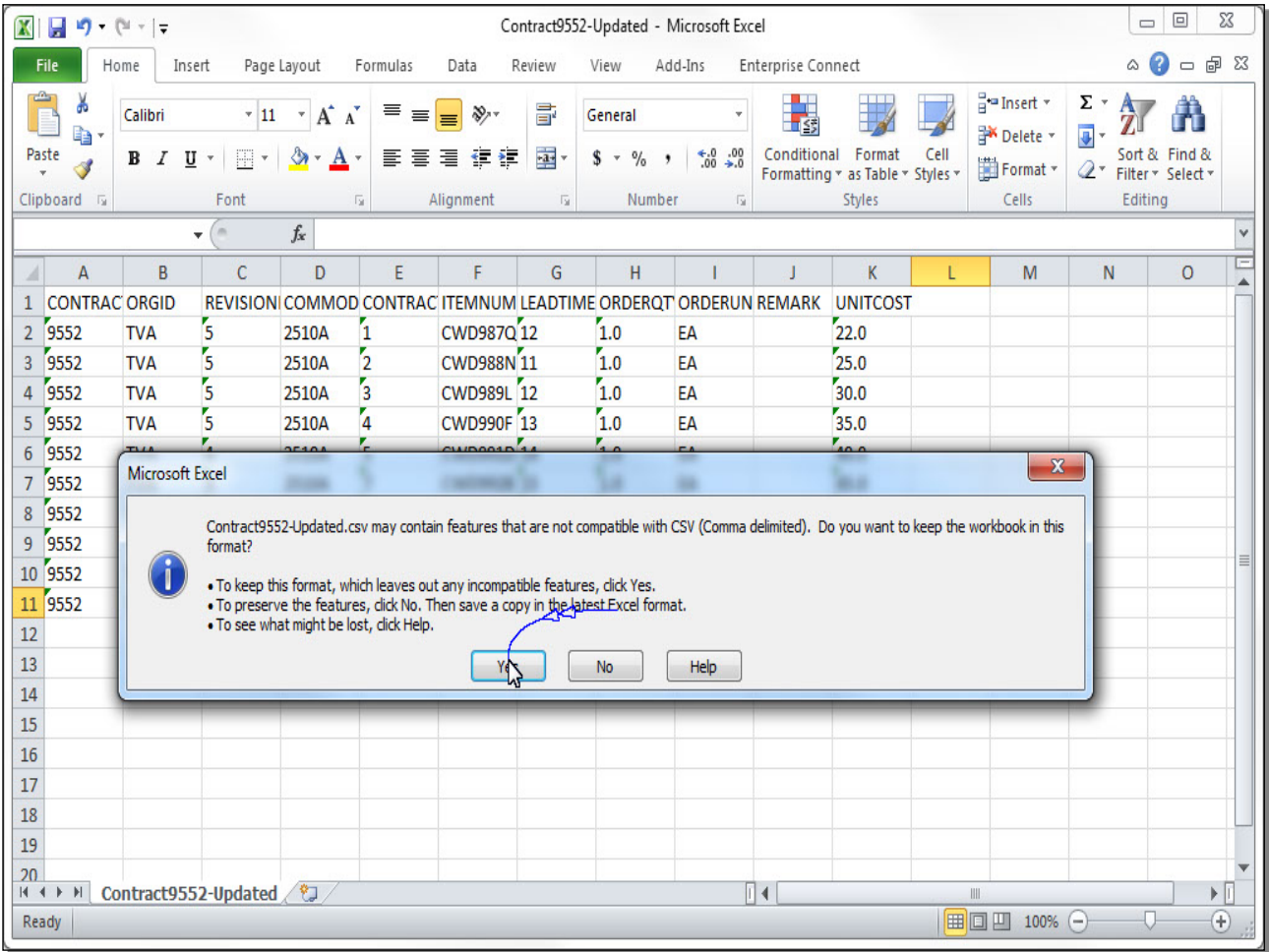
Slide 166 - Demo



Slide notes

Text Captions

Slide 167 - Demo



Slide notes

Text Captions

Slide 168 - Demo

Contract9552-Updated - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Enterprise Connect

Clipboard Font Alignment Number Styles Cells Editing

Calibri 11 A A

General

Conditional Formatting as Table Cell Styles

Insert Delete Format

Sort & Find & Filter Select

L11

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CONTRACT	ORGID	REVISION	COMMOD	CONTRACT	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST				
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0				
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0				
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0				
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0				
6	9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0				
7	9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0				
8	9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0				
9	9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0				
10	9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0				
11	9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		70.0				
12															
13															
14															
15															
16															
17															
18															
19															
20															

Now that the file has been saved, the next step is to return to Maximo.

Click anywhere to continue.

Contract9552-Updated

Ready

100%

Slide notes

Text Captions

Now that the file has been saved, the next step is to return to Maximo.

Click anywhere to continue.

Slide 169 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

The Contract9552-PreUpdate.dat download has completed.

OpenOpen folderView downloads

Slide notes

Text Captions

Slide 170 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract 9552Truck PartsType TVA GENERAL

Revision 5Update pricing and delivery timeVDRAFT

Contract Code MATERIAL

The Application Import icon is used to begin the import process.

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Slide notes

Text Captions

The Application Import icon is used to begin the import process.

Slide 171 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

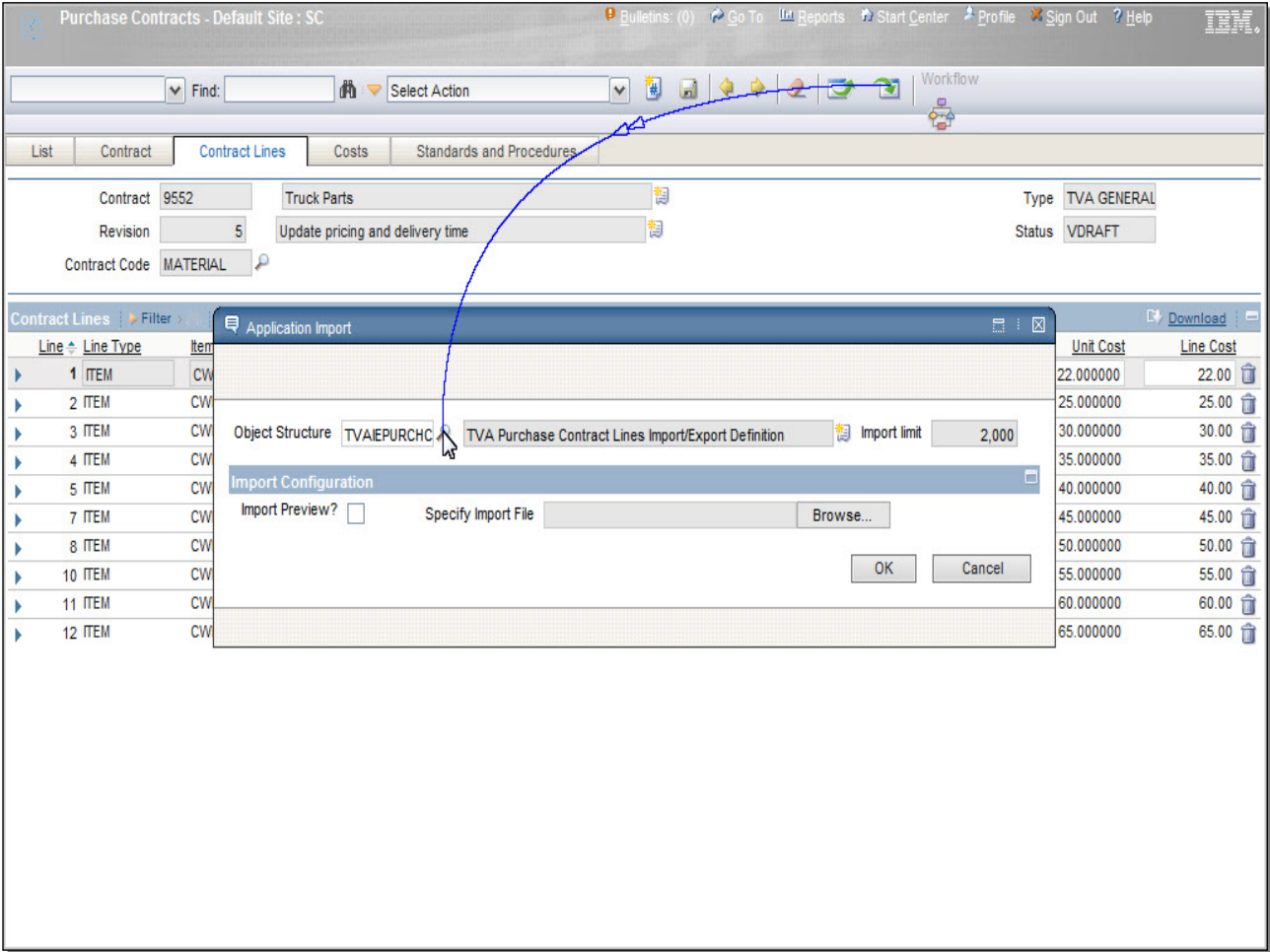
Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Slide notes

Text Captions

Slide 172 - Demo



Slide notes

Text Captions

Slide 173 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help IBM

Find: Select Action Workflow

List Contract Contract Lines Costs Standards and Procedures

Contract 9552 Truck Parts Type TVA GENERAL
Revision 5 Update pricing and delivery time Status VDRAFT
Contract Code MATERIAL

Contract Lines Filter

Line	Line Type	Item	Unit Cost	Line Cost
1	ITEM	CW	22.000000	22.00
2	ITEM	CW	25.000000	25.00
3	ITEM	CW	30.000000	30.00
4	ITEM	CW	35.000000	35.00
5	ITEM	CW	40.000000	40.00
7	ITEM	CW	45.000000	45.00
8	ITEM	CW	50.000000	50.00
10	ITEM	CW	55.000000	55.00
11	ITEM	CW	60.000000	60.00
12	ITEM	CW	65.000000	65.00

Application Import Select Value

Object Structure Filter 1 - 2 of 2 Download

Object Structure Description

Import Config

Import Preview

TVAIEPURCHCONT TVA Purchase Contract Lines Import/Export Definition

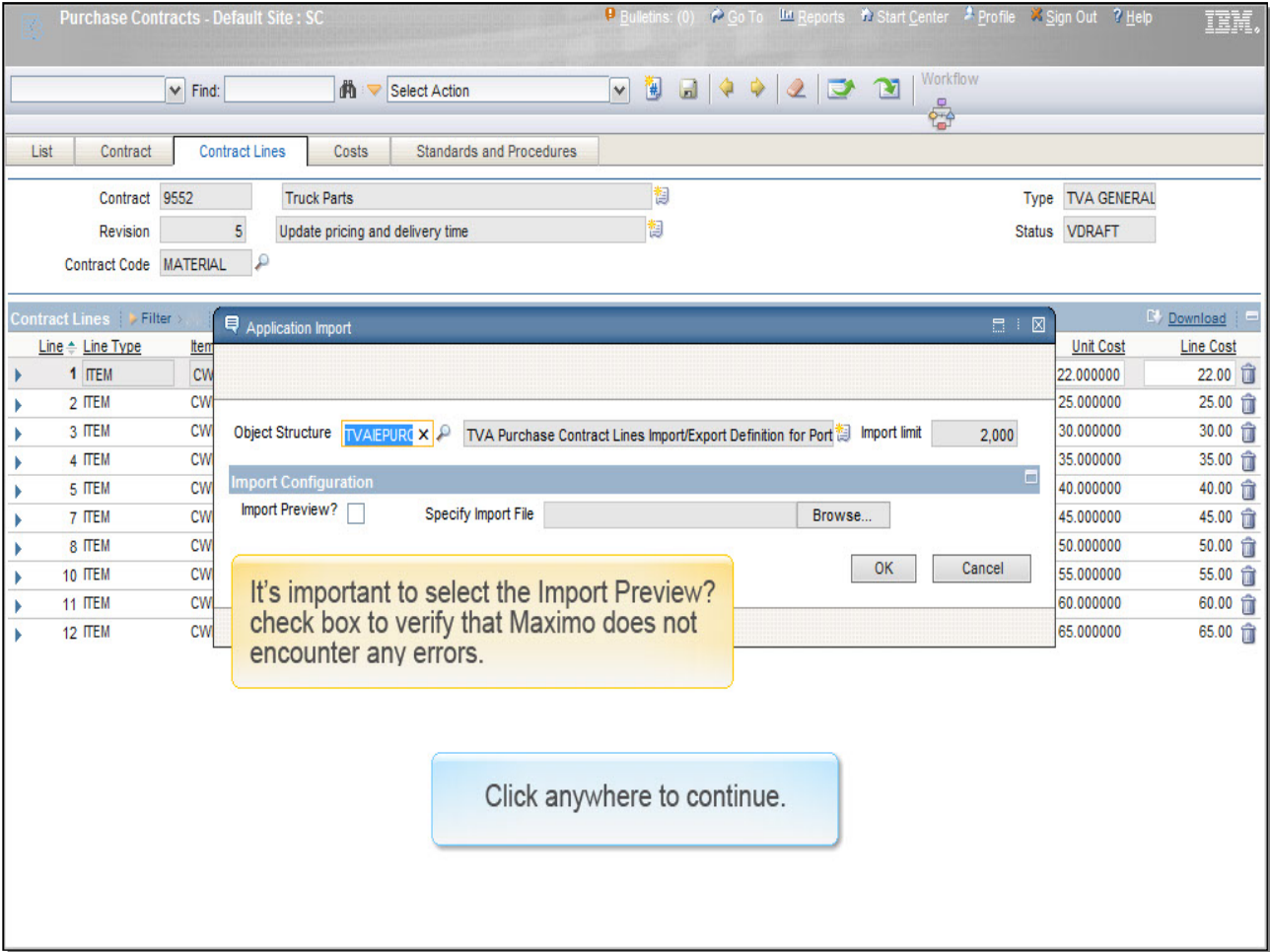
TVAIEPURCHVENDORONLY TVA Purchase Contract Lines Import/Export Definition for Portal Users

Cancel

Slide notes

Text Captions

Slide 174 - Demo



Slide notes

Text Captions

It's important to select the Import Preview? check box to verify that Maximo does not encounter any errors.

Click anywhere to continue.

Slide 175 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL
Revision5Update pricing and delivery timeStatusVDRAFT
Contract CodeMATERIAL

Contract LinesFilter

Line	Line Type	Item
1	ITEM	CW
2	ITEM	CW
3	ITEM	CW
4	ITEM	CW
5	ITEM	CW
7	ITEM	CW
8	ITEM	CW
10	ITEM	CW
11	ITEM	CW
12	ITEM	CW

Application Import

Object StructureTVAEPUR(TVA Purchase Contract Lines Import/Export Definition for Port)Import limit2,000

Import Configuration

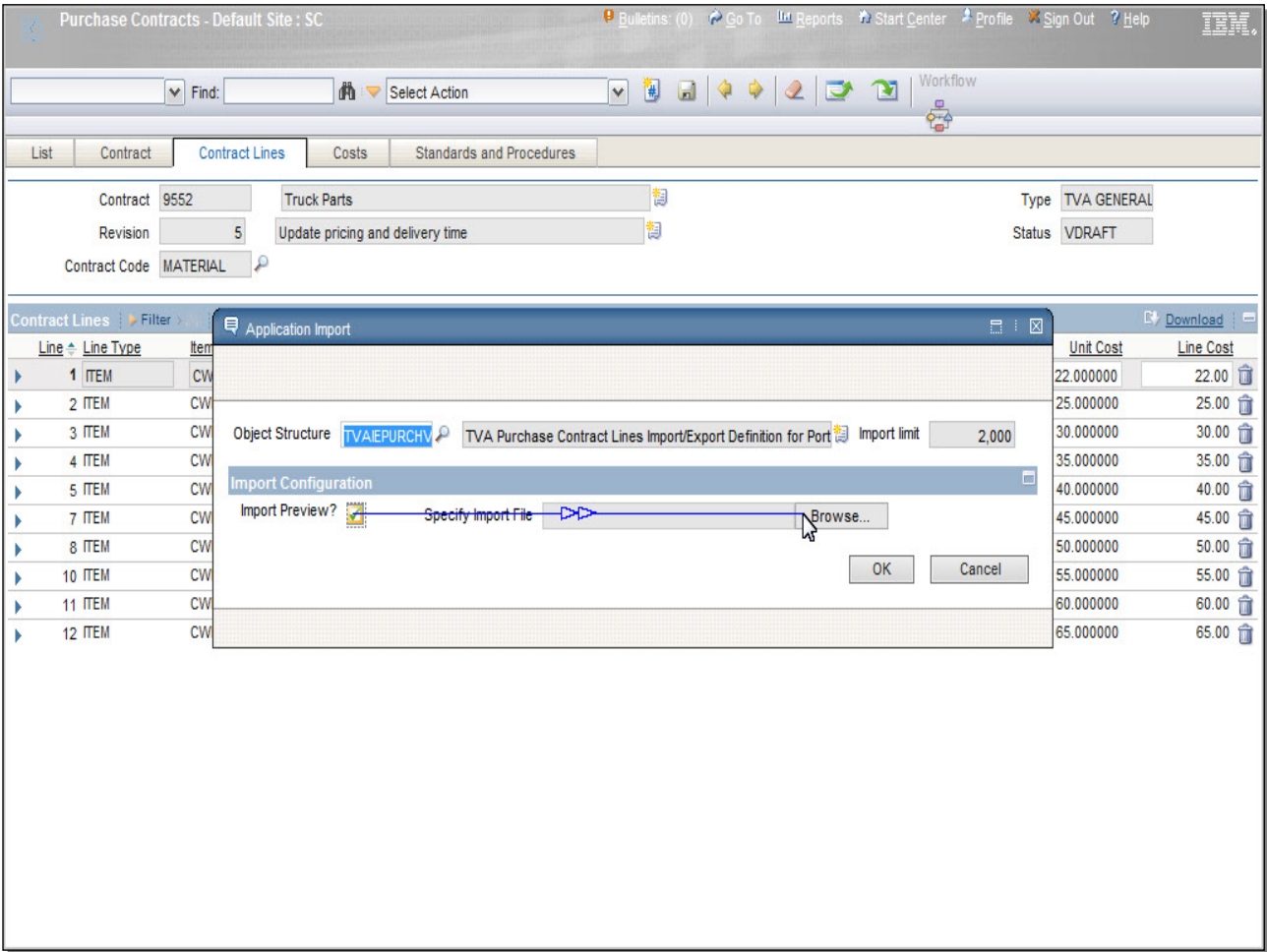
Import Preview?Specify Import FileBrowse...OKCancel

Unit Cost	Line Cost
22.000000	22.00
25.000000	25.00
30.000000	30.00
35.000000	35.00
40.000000	40.00
45.000000	45.00
50.000000	50.00
55.000000	55.00
60.000000	60.00
65.000000	65.00

Slide notes

Text Captions

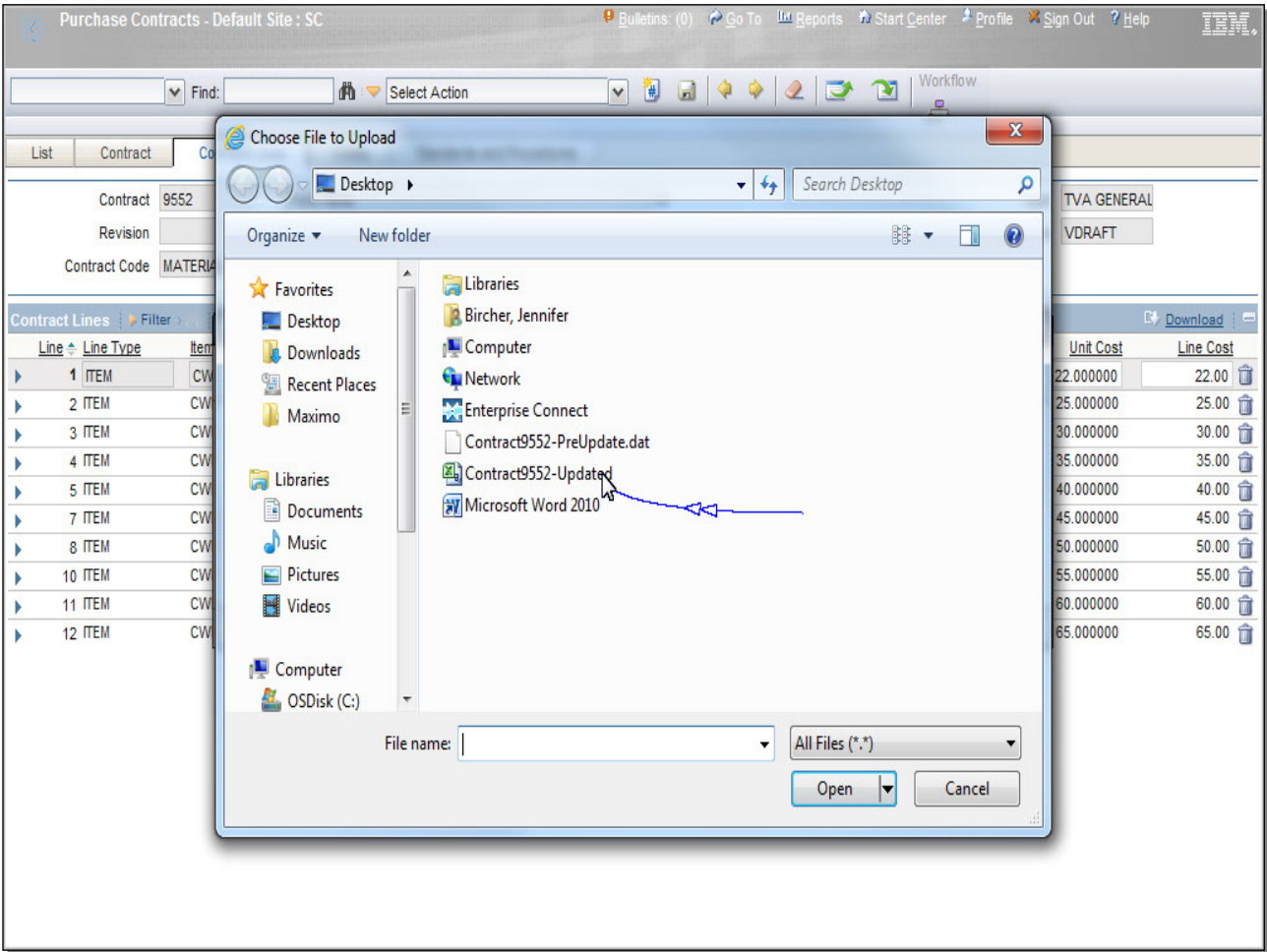
Slide 176 - Demo



Slide notes

Text Captions

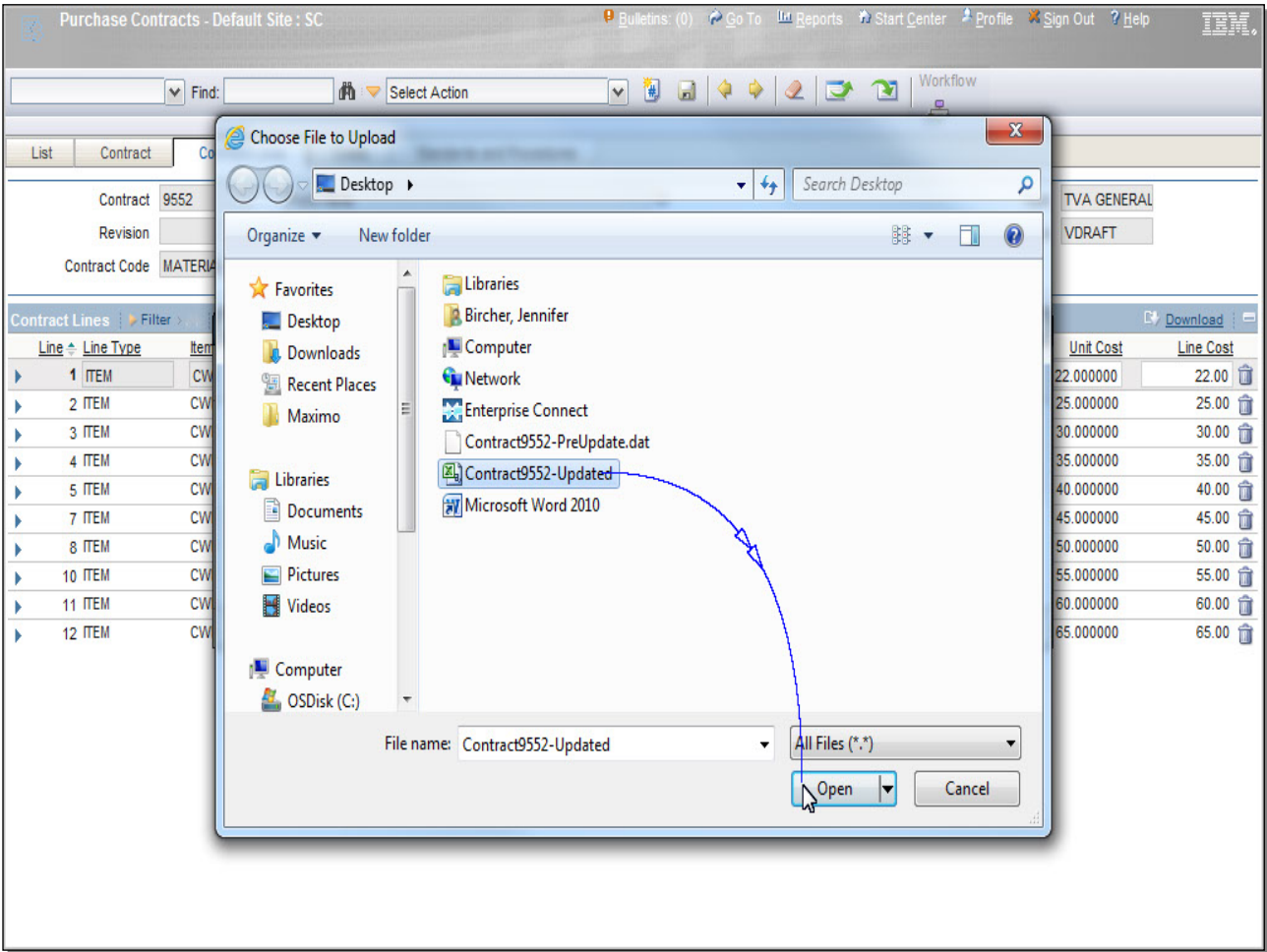
Slide 177 - Demo



Slide notes

Text Captions

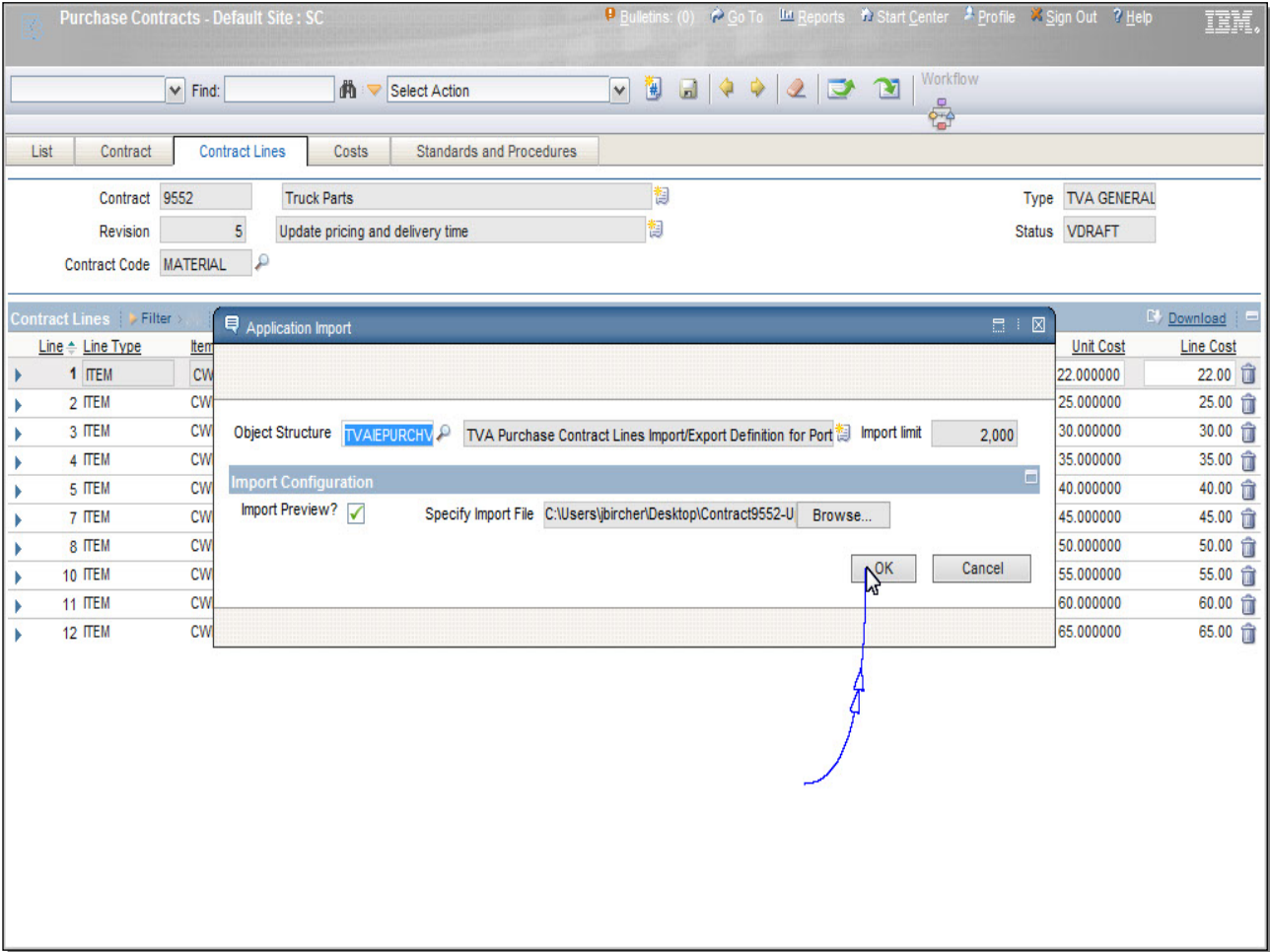
Slide 178 - Demo



Slide notes

Text Captions

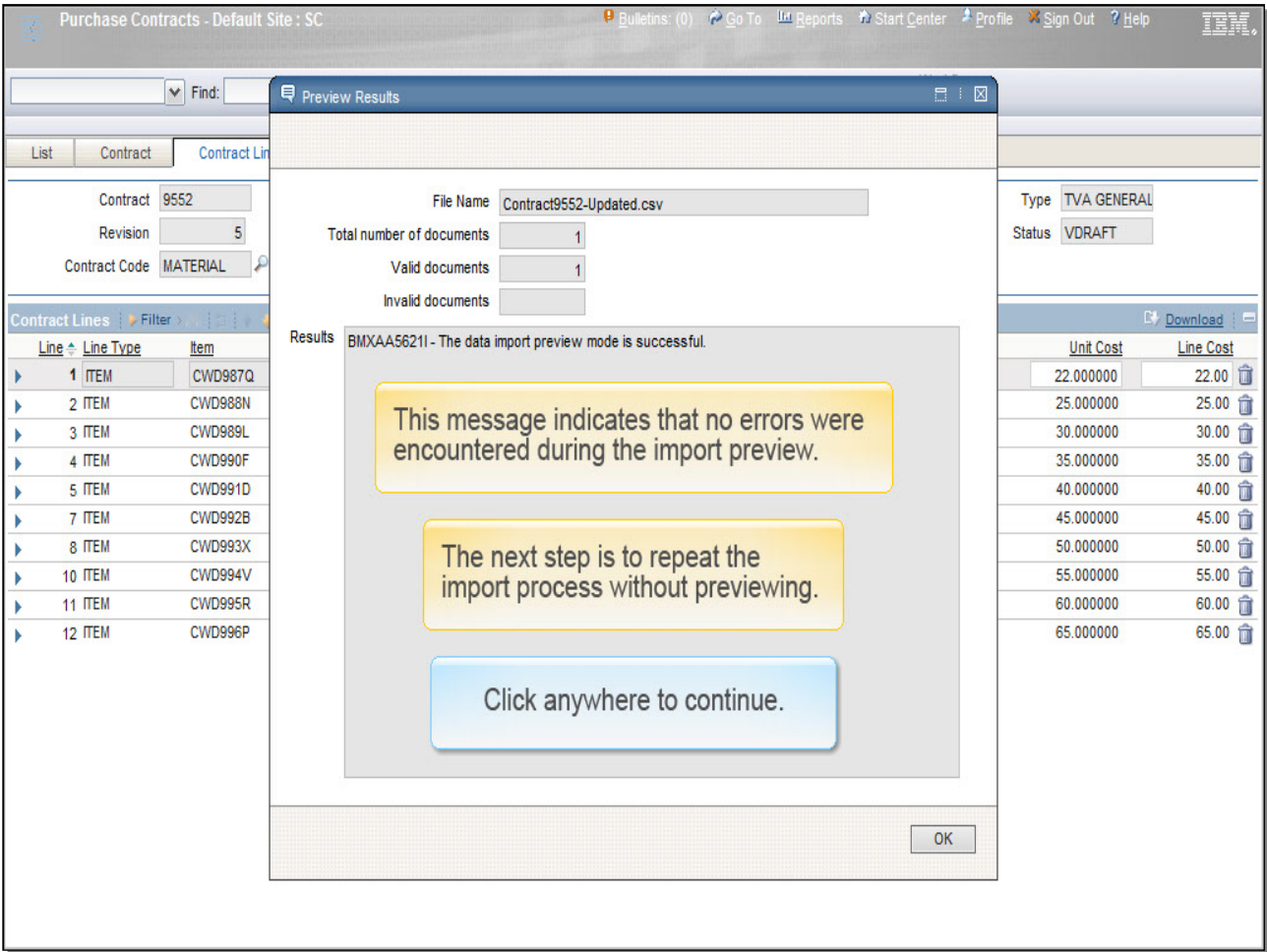
Slide 179 - Demo



Slide notes

Text Captions

Slide 180 - Demo



Slide notes

Text Captions

This message indicates that no errors were encountered during the import preview.

The next step is to repeat the import process without previewing.

Click anywhere to continue.

Slide 181 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToList ReportsStart CenterProfileSign OutHelpIBM

Find:

Preview Results

ListContractContract Lines

Contract9552Revision5Contract CodeMATERIAL

Contract LinesFilter

Line	Line Type	Item
1	ITEM	CWD987Q
2	ITEM	CWD988N
3	ITEM	CWD989L
4	ITEM	CWD990F
5	ITEM	CWD991D
7	ITEM	CWD992B
8	ITEM	CWD993X
10	ITEM	CWD994V
11	ITEM	CWD995R
12	ITEM	CWD996P

File NameContract9552-Updated.csv

Total number of documents1

Valid documents1

Invalid documents

ResultsBMXAA56211 - The data import preview mode is successful.

OK

TypeTVA GENERALStatusVDRAFT

Download

Unit Cost	Line Cost
22.000000	22.00
25.000000	25.00
30.000000	30.00
35.000000	35.00
40.000000	40.00
45.000000	45.00
50.000000	50.00
55.000000	55.00
60.000000	60.00
65.000000	65.00

Slide notes

Text Captions

Slide 182 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)

Go To

Reports

Start Center

Profile

Sign Out

Help

IBM

Find:

Select Action

Workflow

List

Contract

Contract Lines

Costs

Standards and Procedures

Contract 9552

Truck Parts

Type TVA GENERAL

Revision 5

Update pricing and delivery time

Status VDRAFT

Contract Code MATERIAL

Contract Lines

Filter

1 - 10 of 10

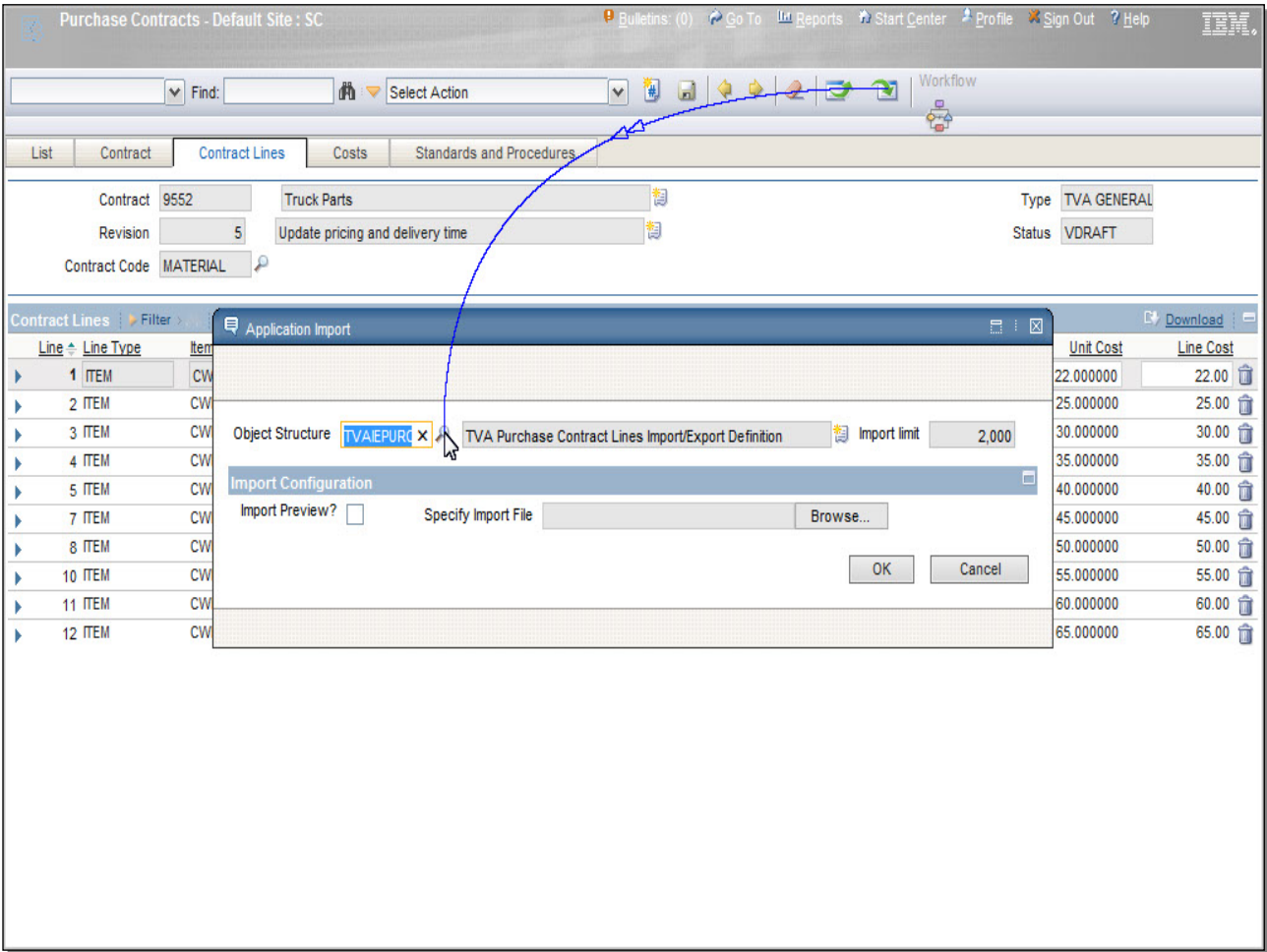
Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

Slide notes

Text Captions

Slide 183 - Demo



Slide notes

Text Captions

Slide 184 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL
Revision5Update pricing and delivery timeStatusVDRAFT
Contract CodeMATERIAL

Contract LinesFilter

Line	Line Type	Item	Unit Cost	Line Cost
1	ITEM	CW	22.000000	22.00
2	ITEM	CW	25.000000	25.00
3	ITEM	CW	30.000000	30.00
4	ITEM	CW	35.000000	35.00
5	ITEM	CW	40.000000	40.00
7	ITEM	CW	45.000000	45.00
8	ITEM	CW	50.000000	50.00
10	ITEM	CW	55.000000	55.00
11	ITEM	CW	60.000000	60.00
12	ITEM	CW	65.000000	65.00

Application Import

Select Value

Object Structure

Import Config

Import Preview

Filter1 - 2 of 2Download

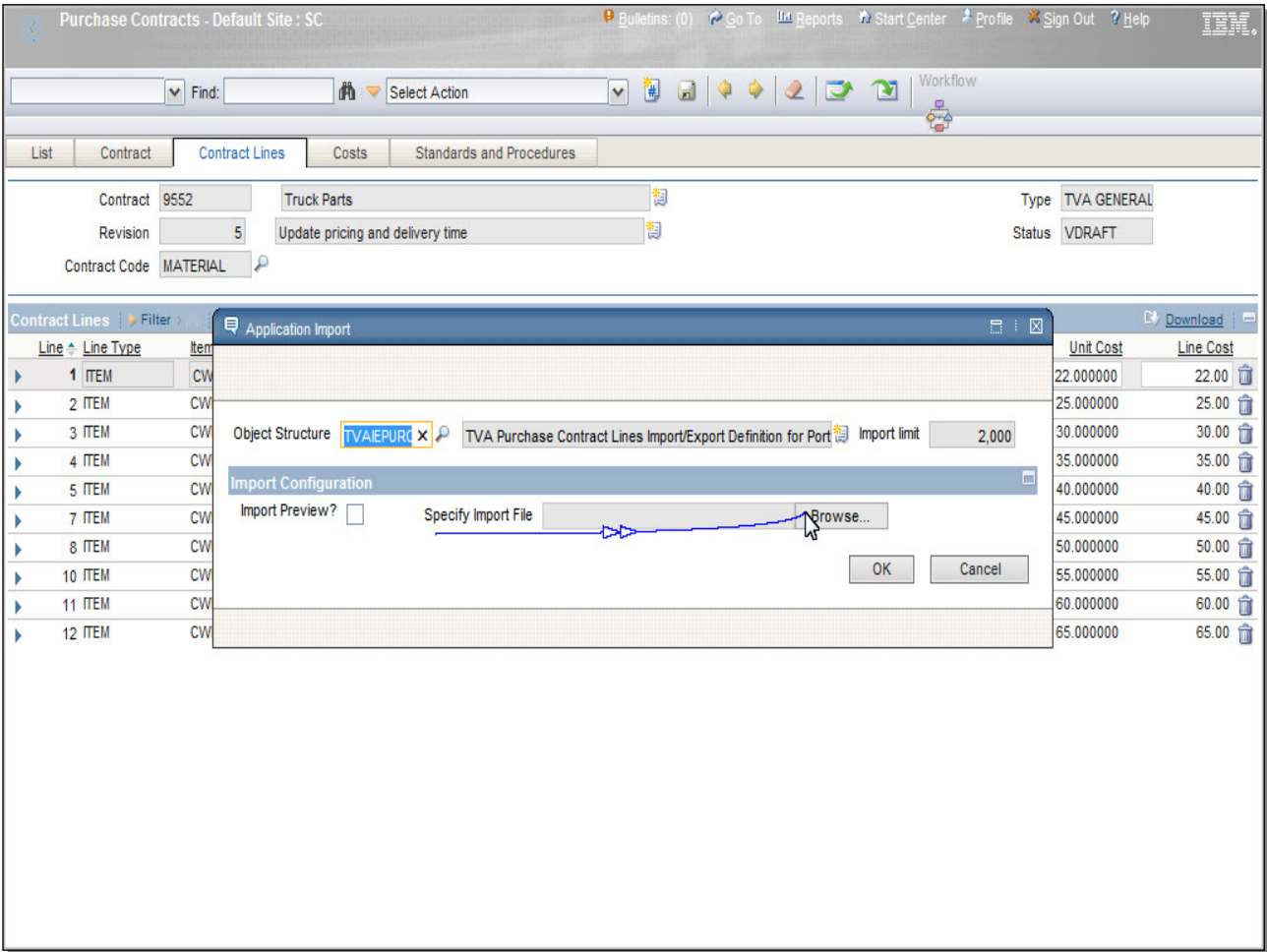
Object Structure	Description
TVAIEPURCHCONT	TVA Purchase Contract Lines Import/Export Definition
TVAIEPURCHVENDORONLY	TVA Purchase Contract Lines Import/Export Definition for Portal Users

Cancel

Slide notes

Text Captions

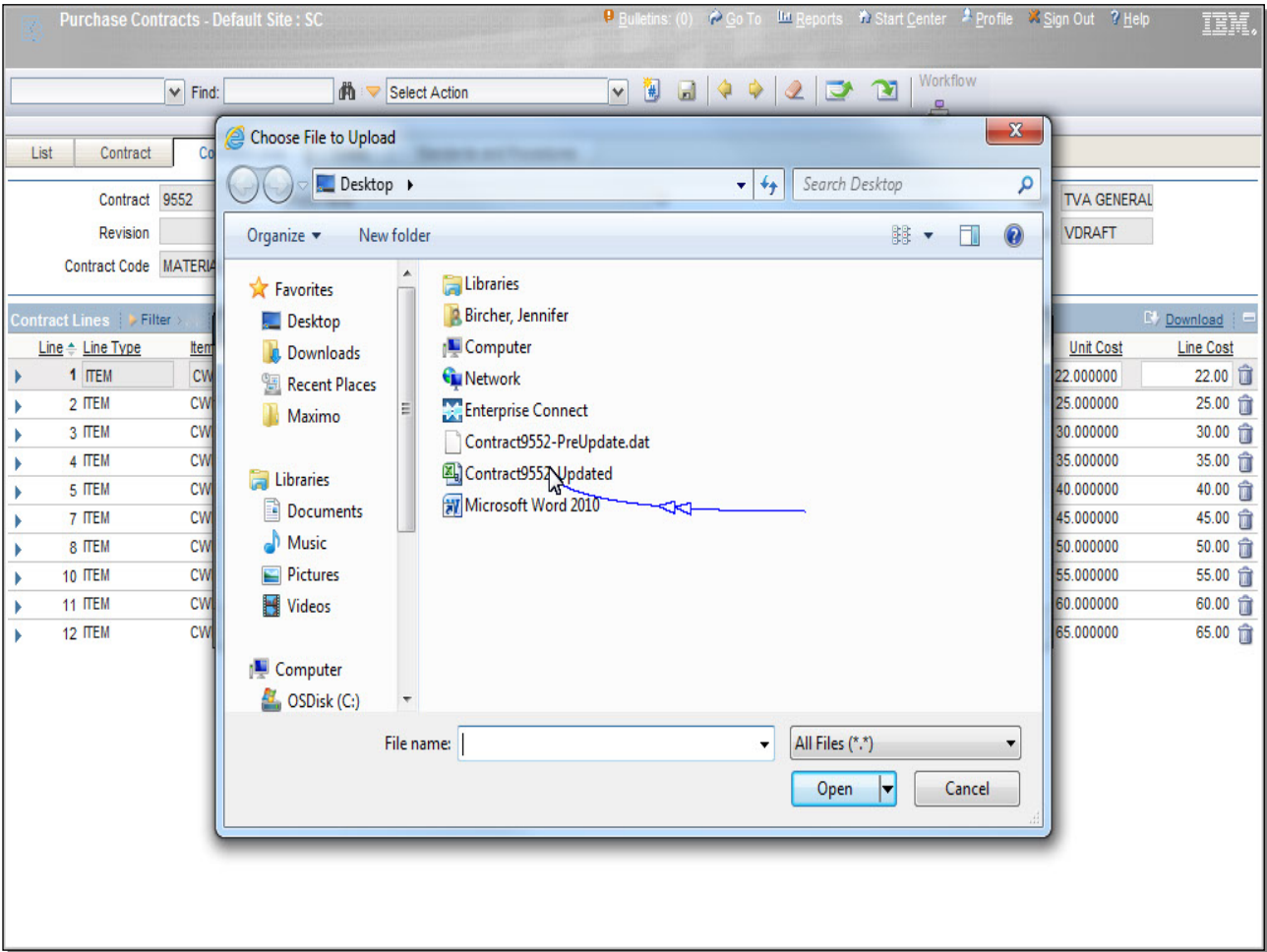
Slide 185 - Demo



Slide notes

Text Captions

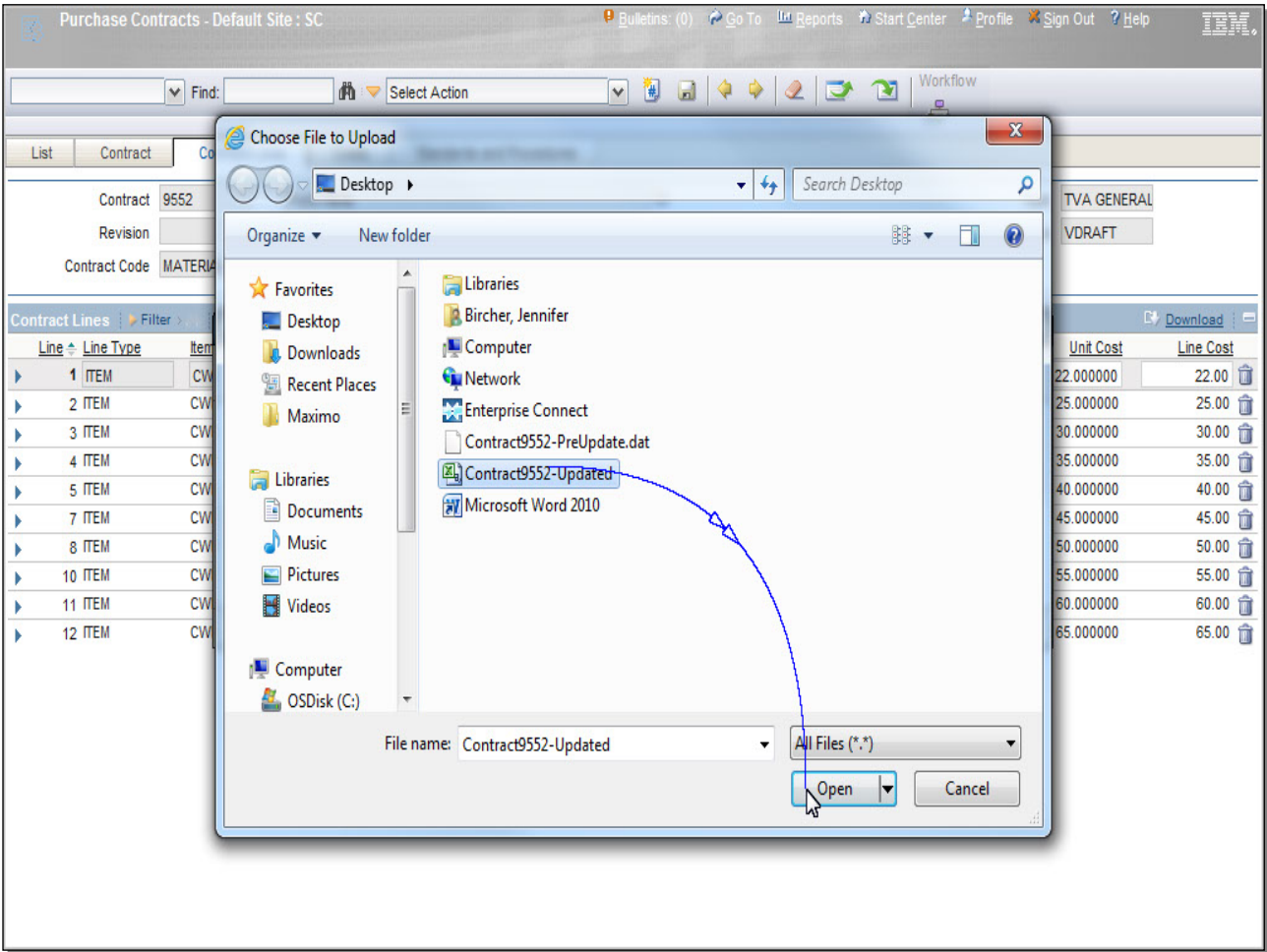
Slide 186 - Demo



Slide notes

Text Captions

Slide 187 - Demo



Slide notes

Text Captions

Slide 188 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help IBM

Find: Select Action Workflow

List Contract Contract Lines Costs Standards and Procedures

Contract 9552 Truck Parts Type TVA GENERAL
Revision 5 Update pricing and delivery time Status VDRAFT
Contract Code MATERIAL

Contract Lines Filter


Line	Line Type	Item	Unit Cost	Line Cost
1	ITEM	CW	22.000000	22.00
2	ITEM	CW	25.000000	25.00
3	ITEM	CW	30.000000	30.00
4	ITEM	CW	35.000000	35.00
5	ITEM	CW	40.000000	40.00
7	ITEM	CW	45.000000	45.00
8	ITEM	CW	50.000000	50.00
10	ITEM	CW	55.000000	55.00
11	ITEM	CW	60.000000	60.00
12	ITEM	CW	65.000000	65.00

Application Import

Object Structure TVAIEPURCHY TVA Purchase Contract Lines Import/Export Definition for Port Import limit 2,000

Import Configuration

Import Preview? ☐ Specify Import File C:\Users\jircher\Desktop\Contract9552-U Browse... OK Cancel



Slide notes

Text Captions

Slide 189 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AU	EA	22.000000	22.00	
2	ITEM	CWD988N	TRUCK,AU	EA	25.000000	25.00	
3	ITEM	CWD989L	TRUCK,AU	EA	30.000000	30.00	
4	ITEM	CWD990F	TRUCK,AU	EA	35.000000	35.00	
5	ITEM	CWD991D	TRUCK,AU	EA	40.000000	40.00	
7	ITEM	CWD992B	TRUCK,AU	EA	45.000000	45.00	
8	ITEM	CWD993X	TRUCK,AU	EA	50.000000	50.00	
10	ITEM	CWD994V	TRUCK,AU	EA	55.000000	55.00	
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

System Message

BMXAA7953I - The import was successful and 1 records were processed.

OK

This message indicates that the import was successful.

Click anywhere to continue.

Slide notes

Text Captions

This message indicates that the import was successful.

Click anywhere to continue.

Slide 190 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AU	EA	22.000000	22.00	
2	ITEM	CWD988N	TRUCK,AU	EA	25.000000	25.00	
3	ITEM	CWD989L	TRUCK,AU	EA	30.000000	30.00	
4	ITEM	CWD990F	TRUCK,AU	EA	35.000000	35.00	
5	ITEM	CWD991D	TRUCK,AU	EA	40.000000	40.00	
7	ITEM	CWD992B	TRUCK,AU	EA	45.000000	45.00	
8	ITEM	CWD993X	TRUCK,AU	EA	50.000000	50.00	
10	ITEM	CWD994V	TRUCK,AU	EA	55.000000	55.00	
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	65.00

System Message

BMXAA7953I - The import was successful and 1 records were processed.

OK

Slide notes

Text Captions

Slide 191 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

ListContractContract LinesCostsStandards and Procedures

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	22.00
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	25.00
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	30.00
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	35.00
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	40.00
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	45.00
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	50.00
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	55.00
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	60.00
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	70.000000	70.00

Slide notes

Text Captions

Slide 192 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

Contract9552Truck PartsTypeTVA GENERAL

Revision5Update pricing and delivery timeStatusVDRAFT

Contract CodeMATERIAL

Contract LinesFilter1 - 10 of 10Download

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line
1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	70.000000	7

Line Item

Coverage

Line12

Line TypeITEM

ItemCWD996PTRUCK,AUTOMOTIVE, QA 0, FLATBED

QA Level0

Green ProcurementH

Manufacturer987654459

DescriptionSNORKEL

Mfg. Part NumberPT-000-120

Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Details

Quantity1.00

StatusPNDREV

Slide notes

Text Captions

Purchase Contracts - Default Site : SC

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find: Select Action Workflow

ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2 ITEM	CWD988M	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3 ITEM			1.00	EA	30.000000	3
4 ITEM			1.00	EA	35.000000	3
5 ITEM					40.000000	4
7 ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED			45.000000	4
8 ITEM					50.000000	5
10 ITEM					55.000000	5
11 ITEM			1.00	EA	60.000000	6
12 ITEM			1.00	EA	70.000000	7

As you can see below, the Unit Cost and Delivery Time have been updated.

The next steps are to save and submit the record.

Click anywhere to continue.

Line Item

Coverage

Line 12

Line Type ITEM

Item CWD996P TRUCK,AUTOMOTIVE, QA 0, FLATBED

QA Level 0

Green Procurement H

Manufacturer 987654459

Description SNORKEL

Mfg. Part Number PT-000-120

Commodity Group 2510A VEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity 1.00

Order Unit EA

Unit Cost 70.000000

Line Cost 70.00

Retention?

Change Price on Use?

Status PNDREV

Entered By HMDMUQG2A PT000117

Entered Date 04/15/2015 3:18 PM

Remarks

Delivery Time 21

Slide 194 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

Find:Select ActionWorkflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	70.000000	7

Line Item

Coverage

Line12Line TypeITEMItemCWD996P >> TRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459 >>

DescriptionSNORKEL

Mfg. Part NumberPT-000-120

Commodity Group2510A >> VEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit* EAAUnit Cost70.000000Line Cost70.00Retention?Change Price on Use?

StatusPNDREV

Entered ByHMDMUQG2A, PT000117

Entered Date04/15/2015 3:18 PM

Remarks

Delivery Time21

Details

Slide notes

Text Captions

Slide 195 - Demo

Purchase Contracts - Default Site : SC

Bulletins: (0)Go ToReportsStart CenterProfileSign OutHelp

BMXAA4205I - Record has been saved.

Find:Select ActionWorkflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	70.000000	7

Line Item

Coverage

Line1Line TypeITEMItemCWD987QTRUCK,AUTOMOTIVE, QA 0, FLATBEDQA Level0Green ProcurementH

Manufacturer987654459DescriptionSNORKELMfg. Part NumberPT-000-111Commodity Group2510AVEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

Quantity and Costs

Quantity1.00Order Unit*EAUnit Cost22.000000Line Cost22.00Retention?Change Price on Use?

Details

StatusPNDREVEntered ByHMDMUQG2AEntered Date04/15/2015 3:18 PMRemarksDelivery Time12

Slide notes

Text Captions

Slide 196 - Demo

Purchase Contracts - Default Site : SC

BMXAA44411 - Process GCNTRT started.

Find: Select Action Workflow

1	ITEM	CWD987Q	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	22.000000	2
2	ITEM	CWD988N	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	25.000000	2
3	ITEM	CWD989L	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	30.000000	3
4	ITEM	CWD990F	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	35.000000	3
5	ITEM	CWD991D	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	40.000000	4
7	ITEM	CWD992B	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	45.000000	4
8	ITEM	CWD993X	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	50.000000	5
10	ITEM	CWD994V	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	55.000000	5
11	ITEM	CWD995R	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	60.000000	6
12	ITEM	CWD996P	TRUCK,AUTOMOTIVE, QA 0, FLATBED	1.00	EA	65.000000	6

Coverage

Line 1 Description SNORKEL

Line Type ITEM Mfg. Part Number PT-000-111

Item CWD987Q TRUCK,AUTOMOTIVE, QA 0, FLATBED Commodity Group 2510A VEHICLE EQUIPMENT COMPONENTS Machinery/Equip P

QA Level 0

Green Procurement H

Quantity and Costs

Quantity 1.00

Order Unit EA

Unit Cost 22.000000

Line Cost 22.00

Retention?

Change Price on Use?

Details

Status PNDREV

Entered By HMDMUQG2A PT000117

Entered Date 04/15/2015 3:18 PM

Remarks

Delivery Time 12

Slide notes

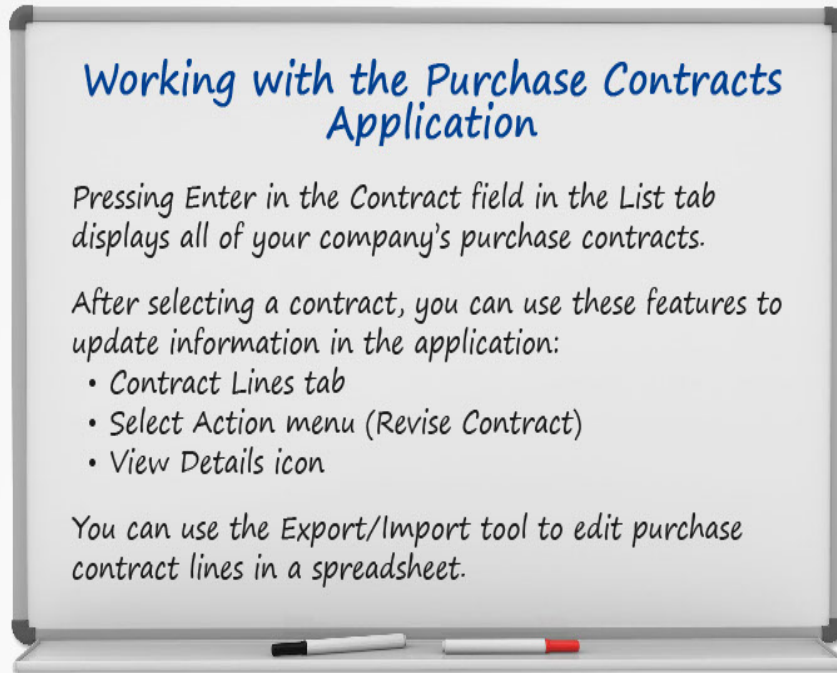
Text Captions

After the record is saved and submitted, Maximo displays the first line item in the contract.

This concludes the demonstration.
Click anywhere to continue.

Page 212 of 215

Summary



Refer to the **Purchase Contracts Export/Import Tool** job aid in the Supplier Portal for a summary of the export/import steps covered in the demonstration.

Slide notes

This concludes the lesson. Take a moment to review the key points covered.

Text Captions

Summary

Working with the Purchase Contracts Application

Pressing Enter in the Contract field in the List tab displays all of your company's purchase contracts.

After selecting a contract, you can use these features to update information in the application:

Contract Lines tab

Select Action menu (Revise Contract)

View Details icon

You can use the Export/Import tool to edit purchase contract lines in a spreadsheet.

Refer to the **Purchase Contracts Export/Import Tool** job aid in the Supplier Portal for a summary of the export/import steps covered in the demonstration.

Course Conclusion



Review topics using the Table of Contents.

Refer to the job aids supporting the topics.

Contact your TVA Contract Manager or Buyer for assistance.

Slide notes

This concludes the Maximo for the Supplier Portal course.

You can review any of the topics using the Table of Contents.

Remember to refer to the job aids supporting the topics covered in the course.

If you have any questions about what you've just learned, contact your TVA Contract Manager or Buyer for assistance.

Text Captions

Review topics using the Table of Contents.

Refer to the job aids supporting the topics.

Contact your TVA Contract Manager or Buyer for assistance.