Slide 1 - Maximo for the Supplier Portal

Slide notes

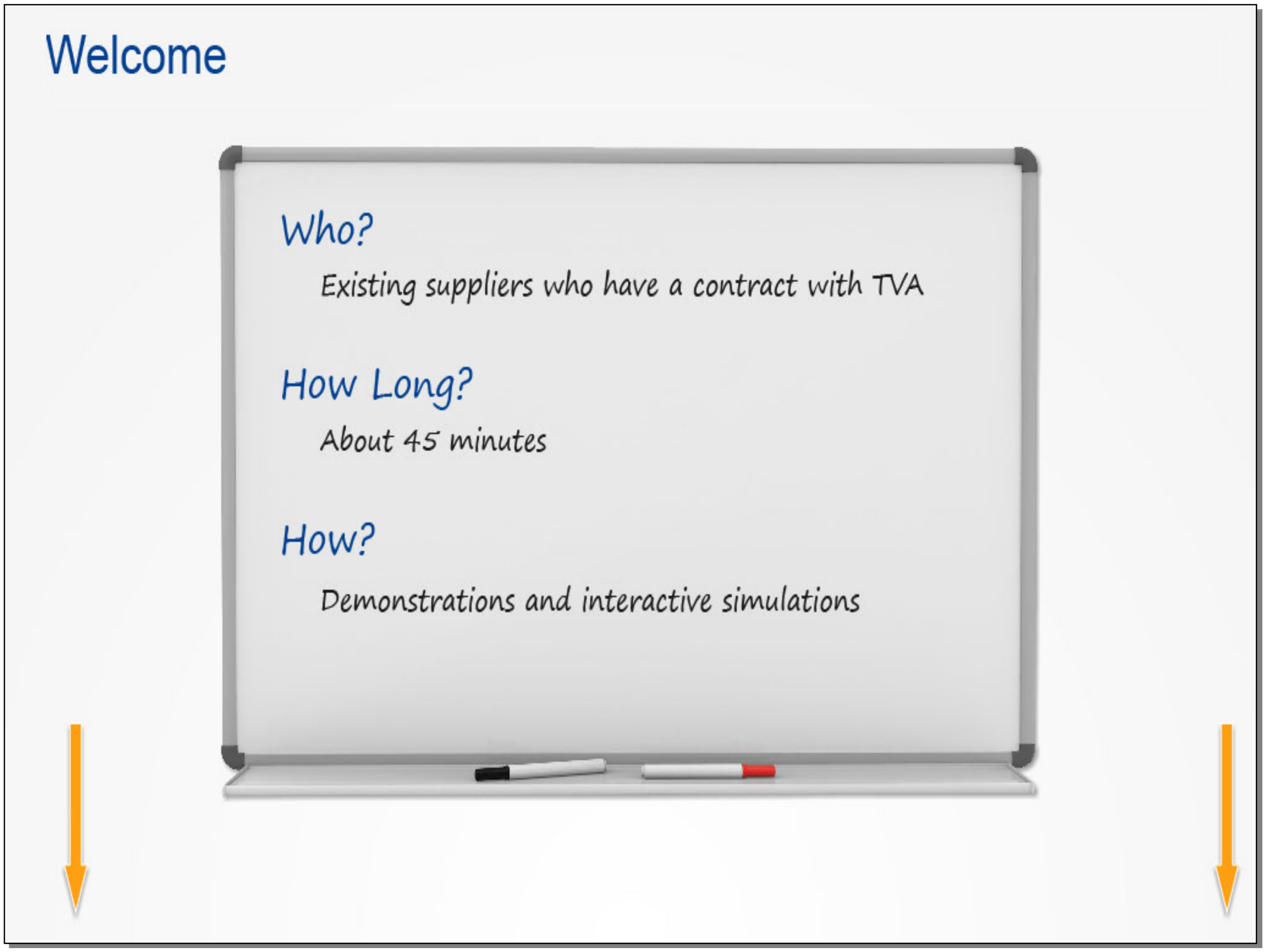
Enter slide note

Text Captions

Maximo for the Supplier Portal

Version 1.0

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:

Slide 4 - Introduction

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

Slide 5 - 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.

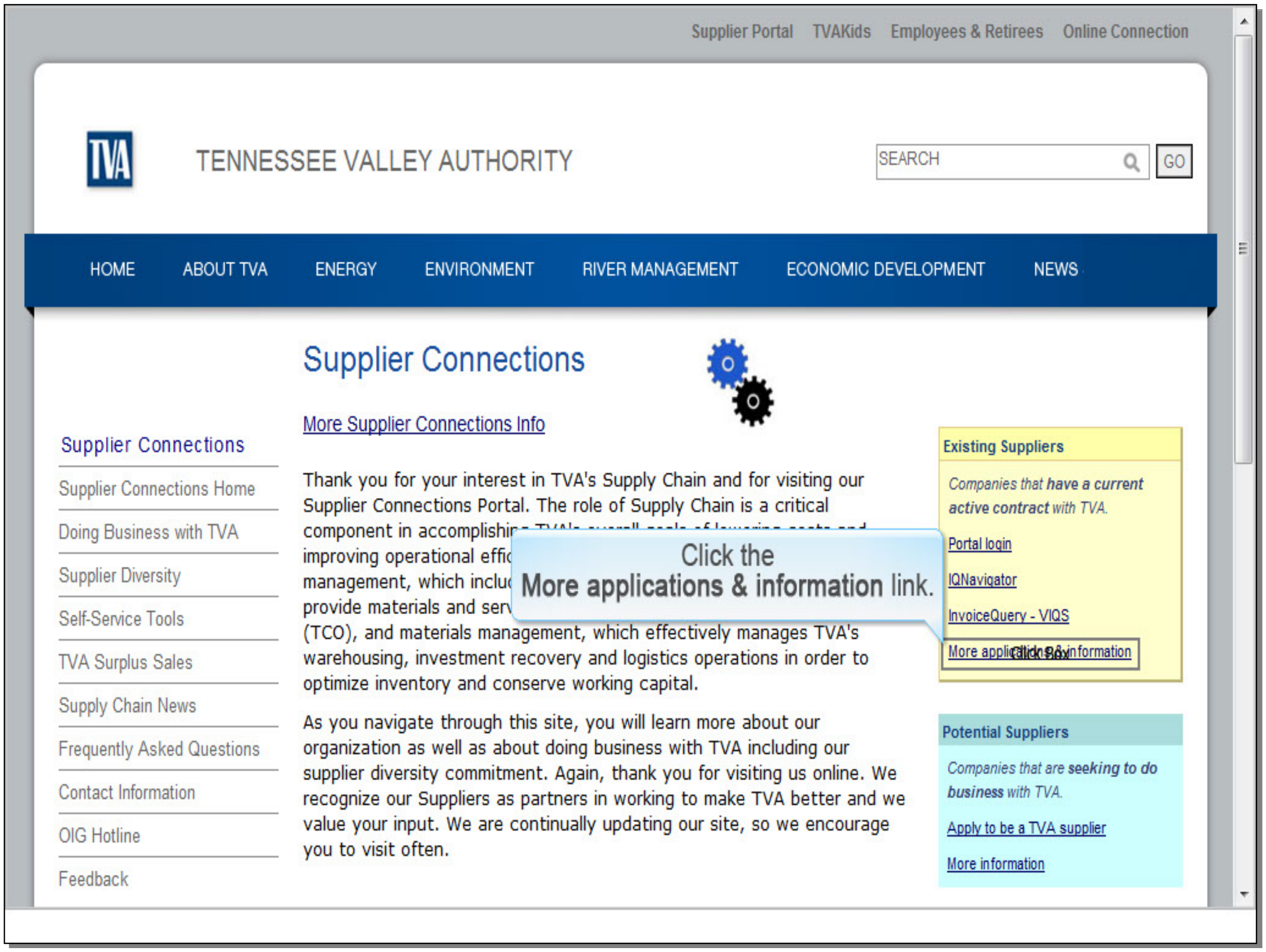
Technical Specifications:

Windows 7 or earlier only

Internet Explorer 9, 10 recommended

Internet Explorer 6, 7, 8 accepted

Slide 6 - Registering for the Supplier Portal



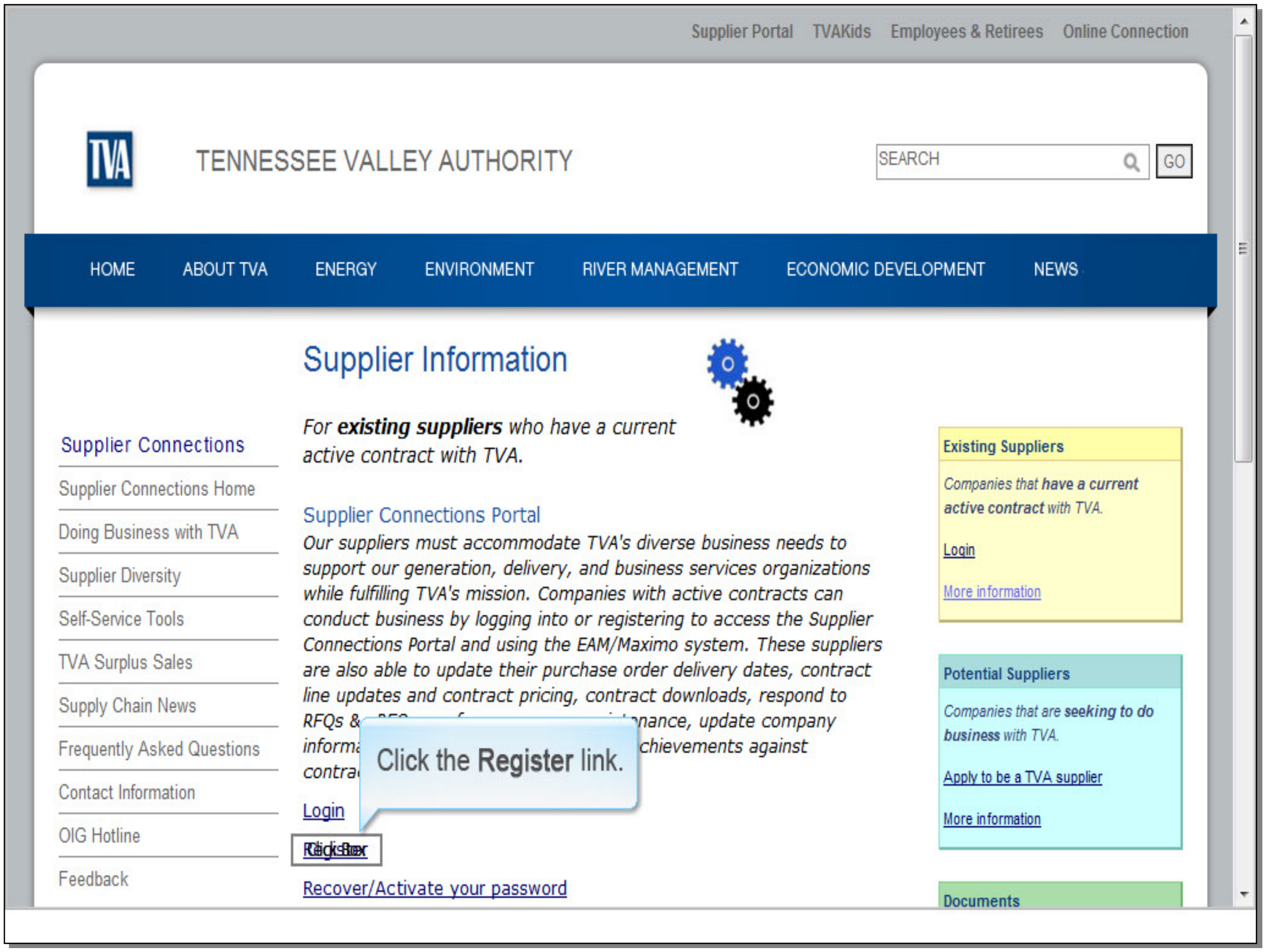
Slide notes

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

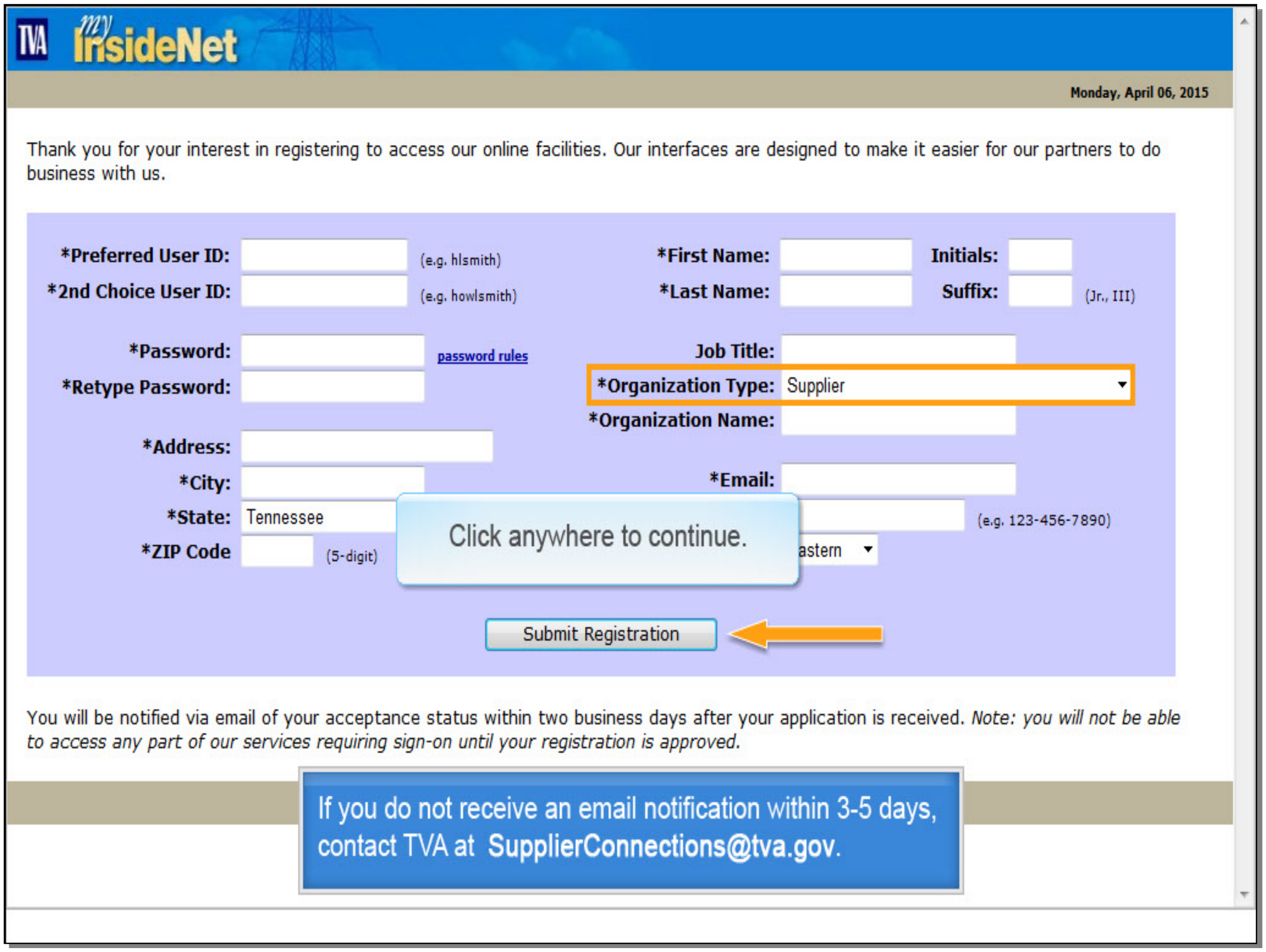


Slide notes

Text Captions

Click the **Register** link.

Slide 8 - Registering for the Supplier Portal



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.

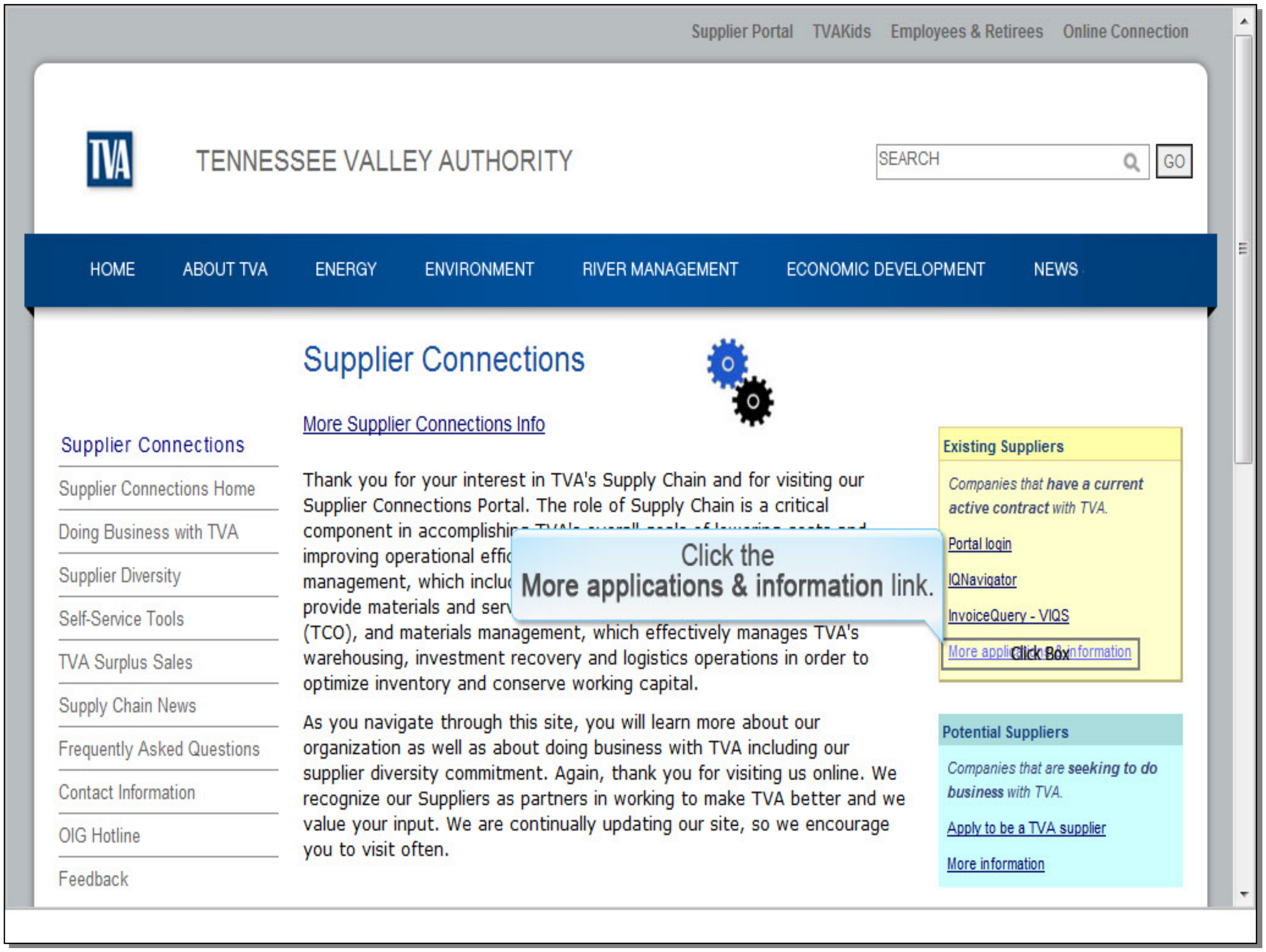
You will receive an email notification once your application has been approved. If you don’t receive a notification, contact TVA using this email address.

Look over this screen and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 9 - Activating Your Password



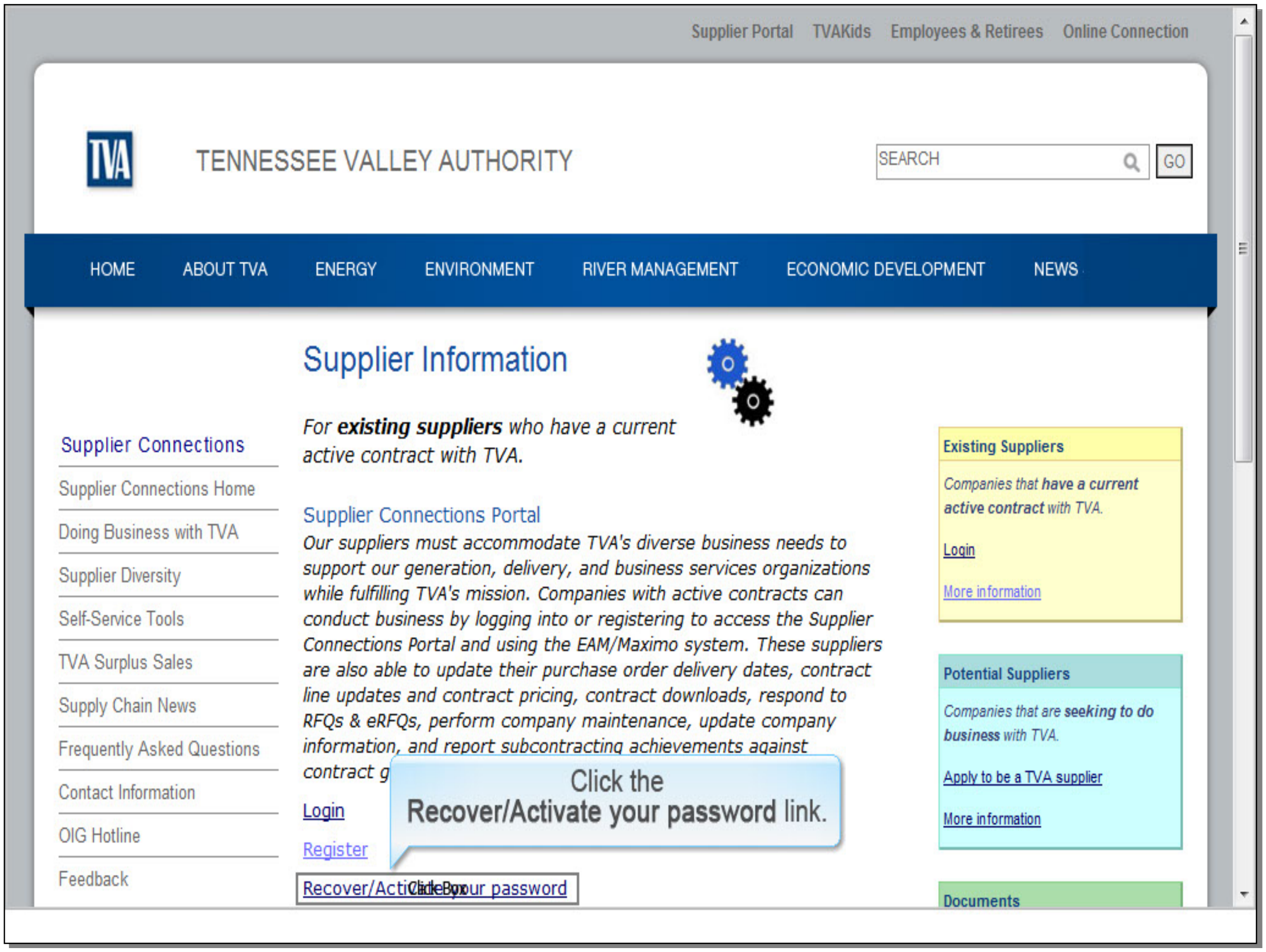
Slide notes

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

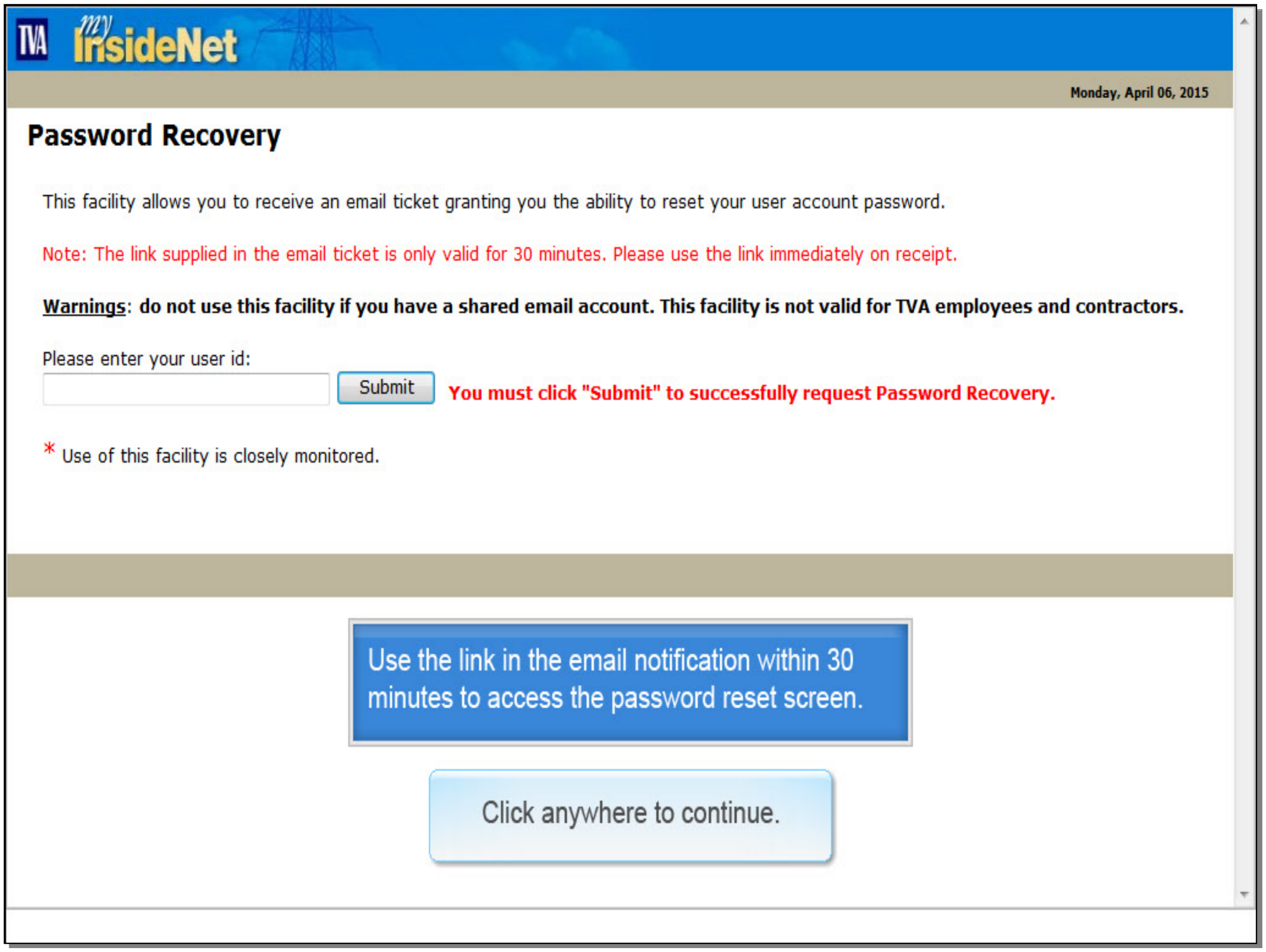


Slide notes

Text Captions

Click the
Recover/Activate your password link.

Slide 11 - Activating Your Password



Slide notes

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

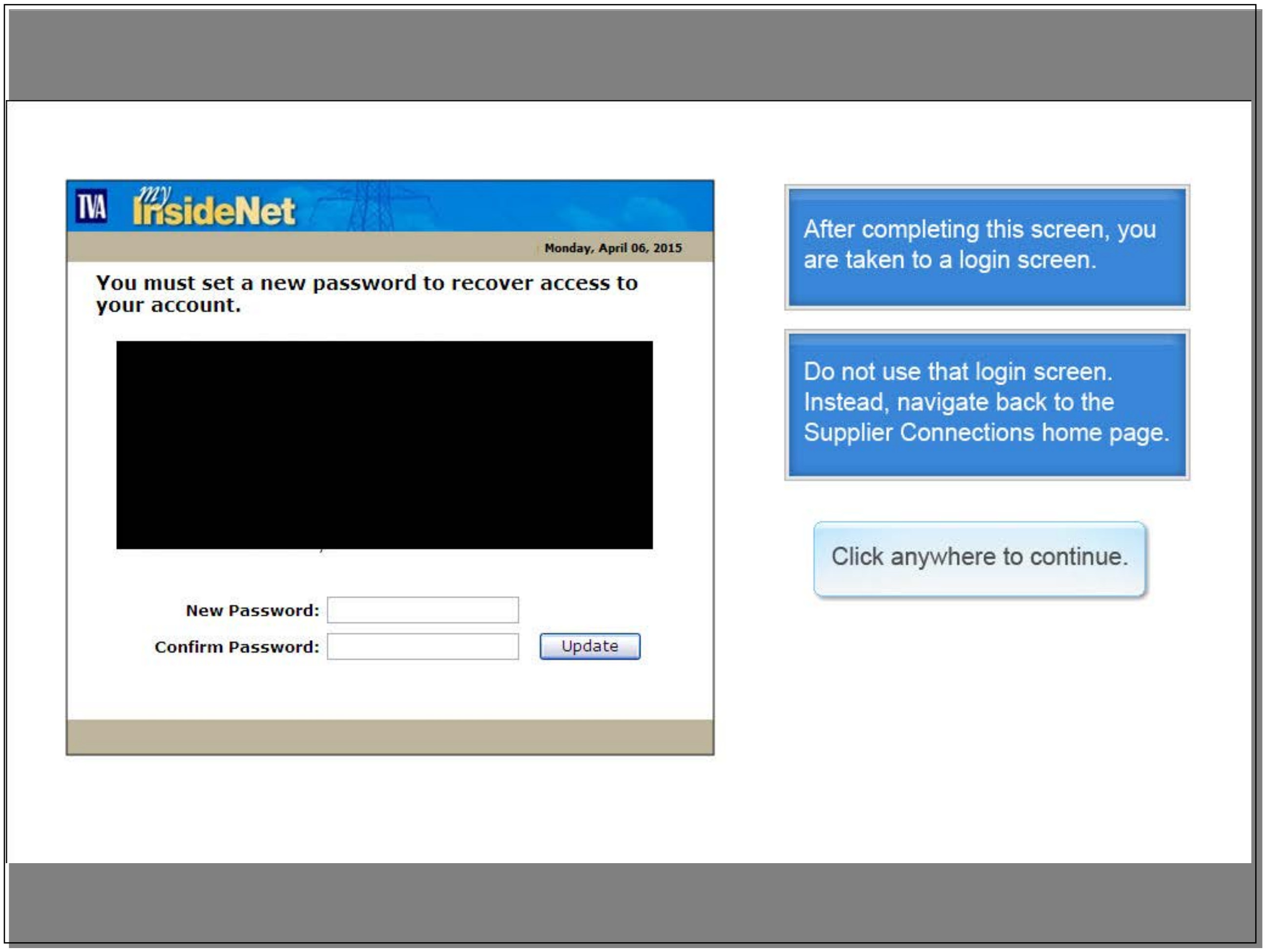
You will receive an email with a password reset link within 30 minutes of submitting the password recovery request. It’s important to use the link immediately, because it expires after 30 minutes.

Look over this screen and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 12 - Activating Your Password



Slide notes

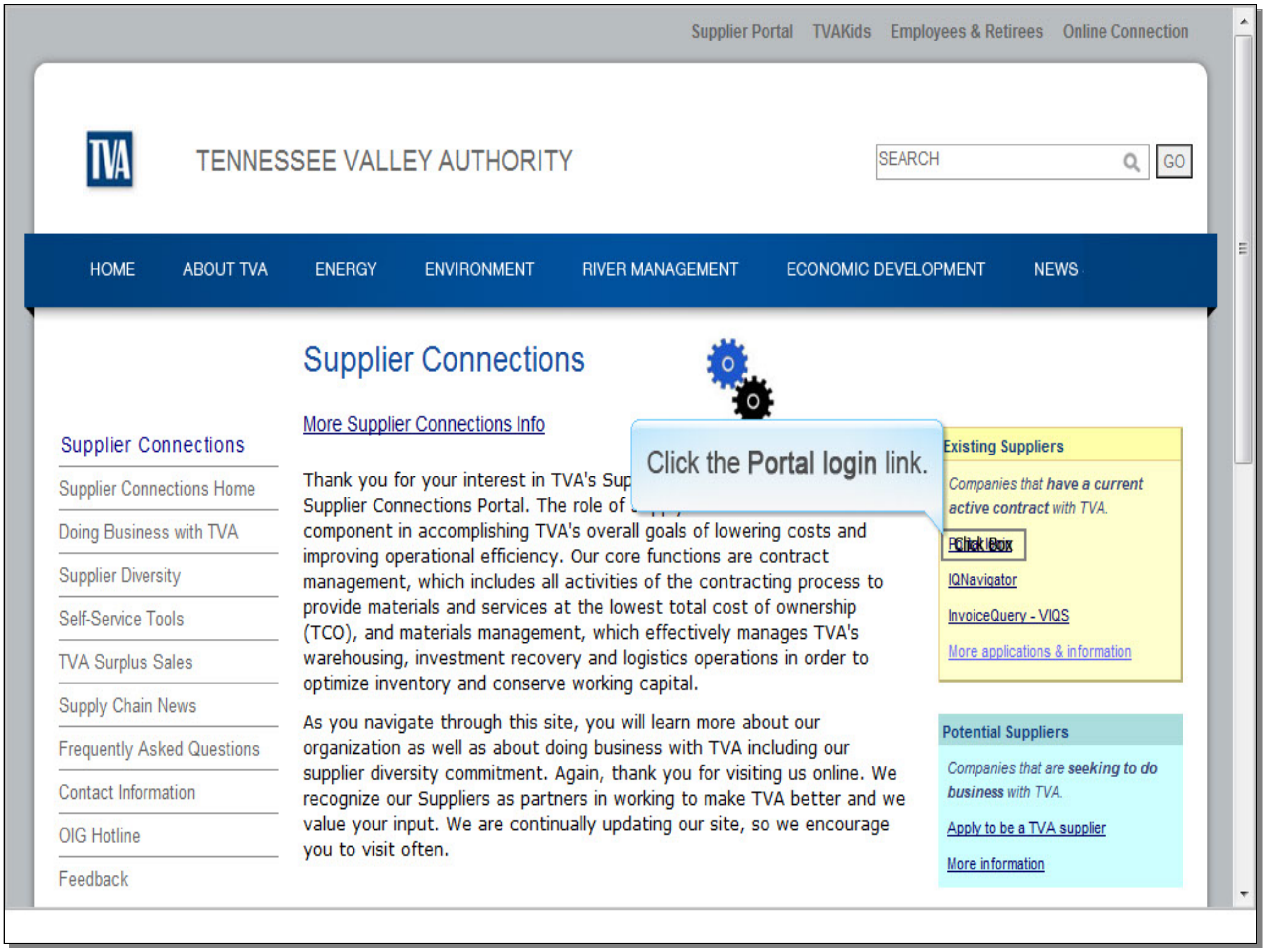
After accessing this screen, you enter your new password and click the Update button. You are then taken to a login screen, but do NOT use that screen. Instead, navigate back to the Supplier Connections home page.

Look this over and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 13 - Logging in to the Portal



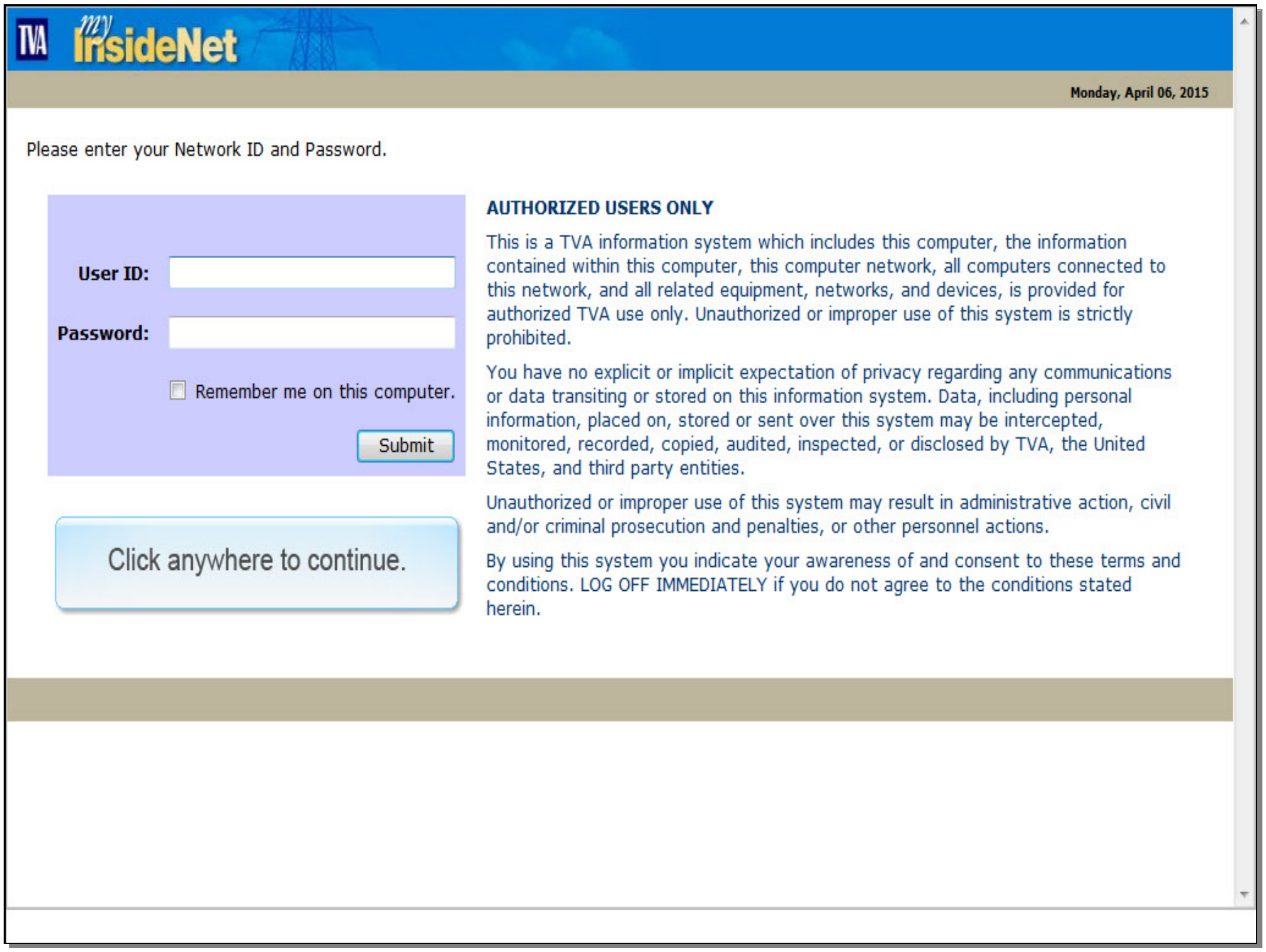
Slide notes

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



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

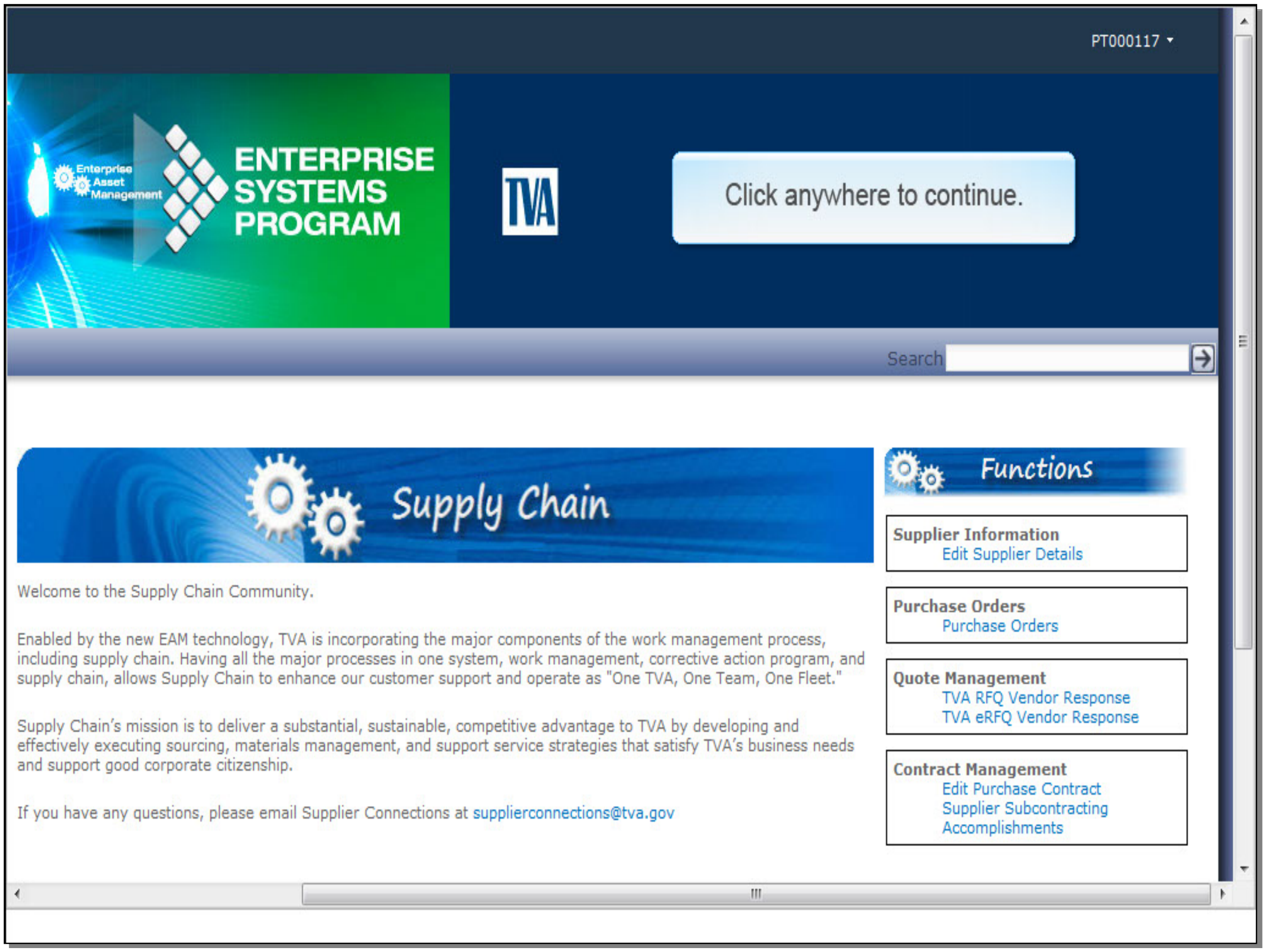
Slide notes

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



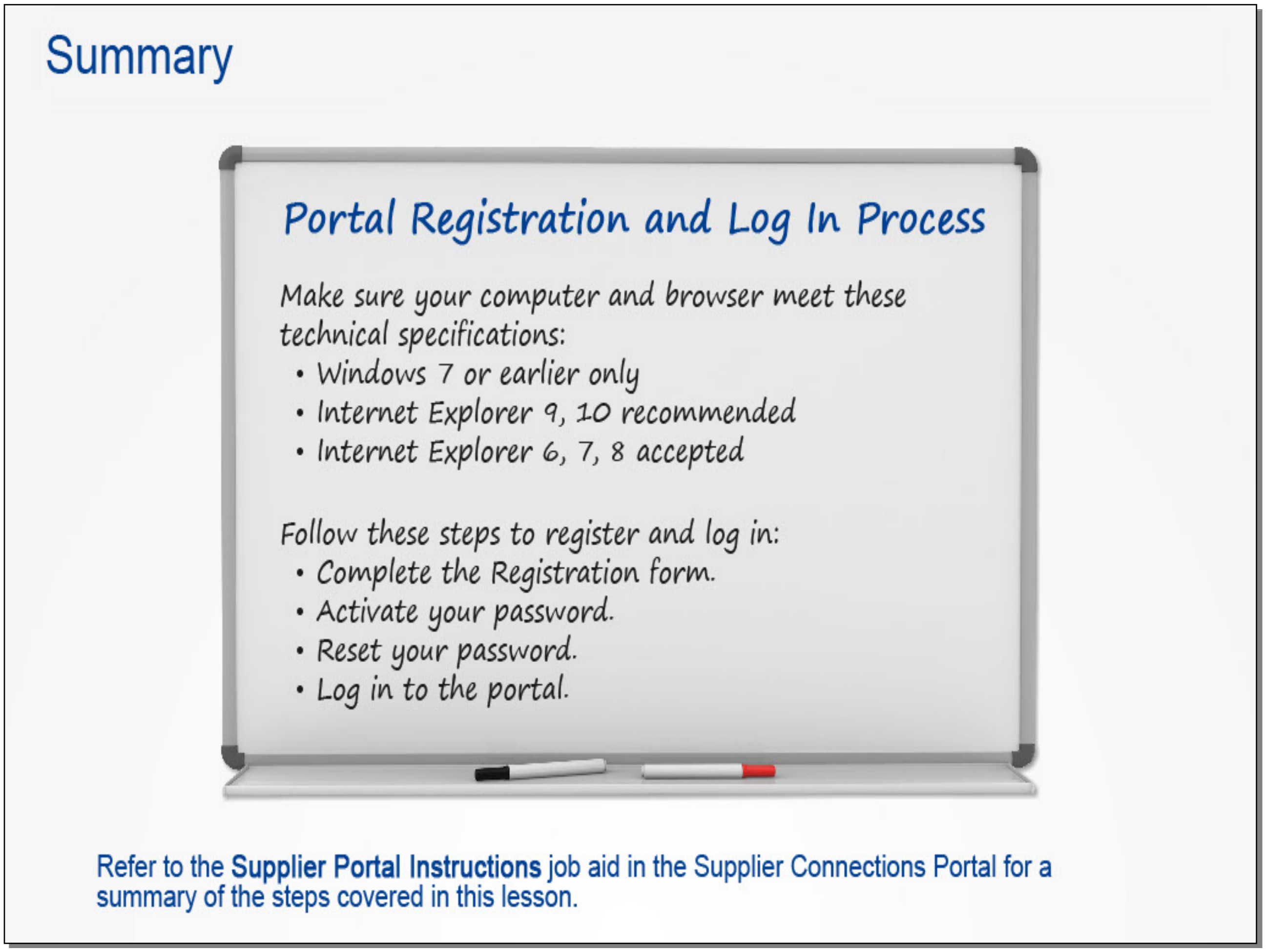
Slide notes

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

Text Captions

Click anywhere to continue.

Slide 17 - Summary



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.

Slide 18 - Introduction

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

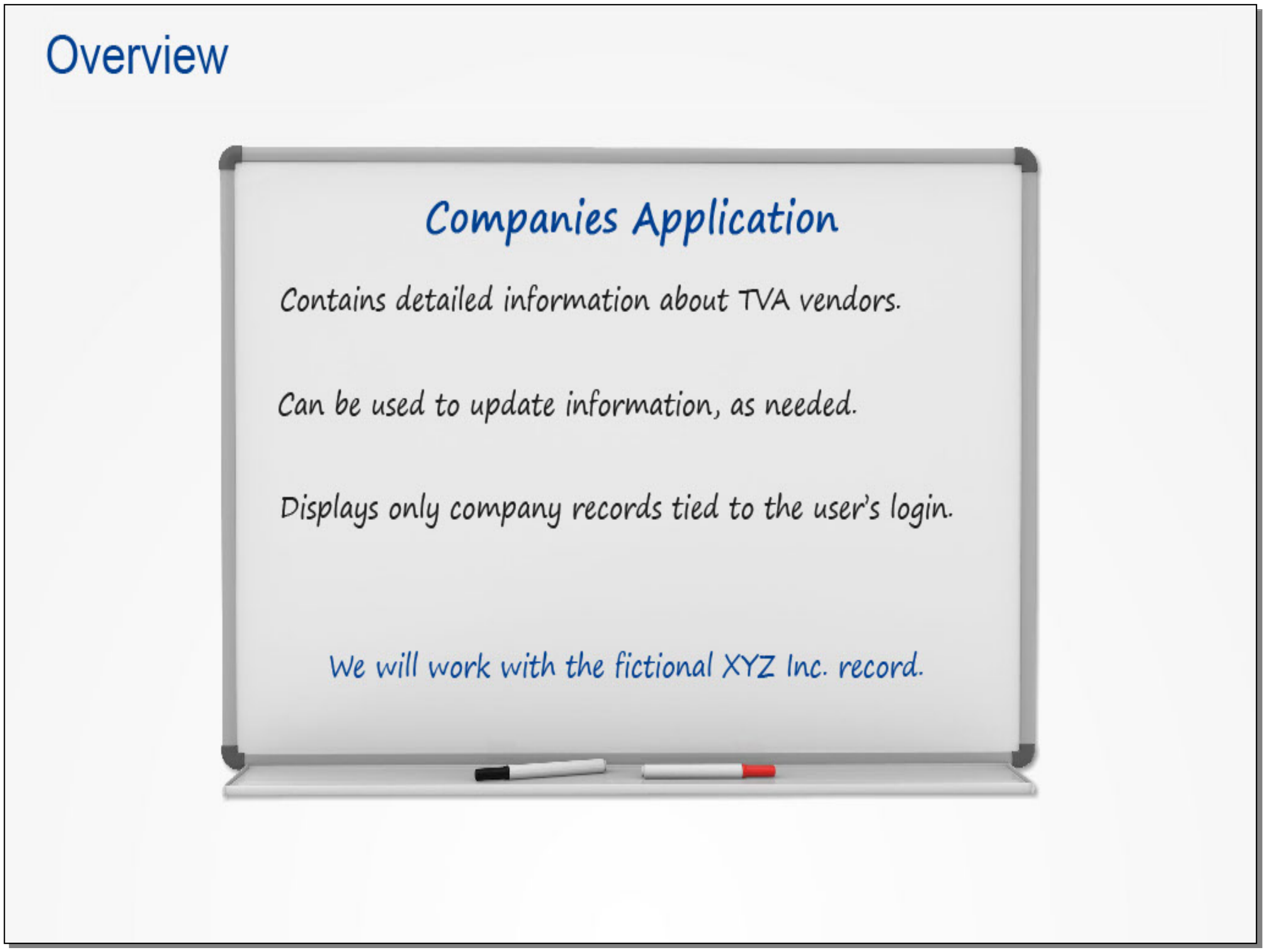
Viewing the Company Record

Editing the Record

Adding a Contact

Navigating Using the Go To Menu

Slide 19 - 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

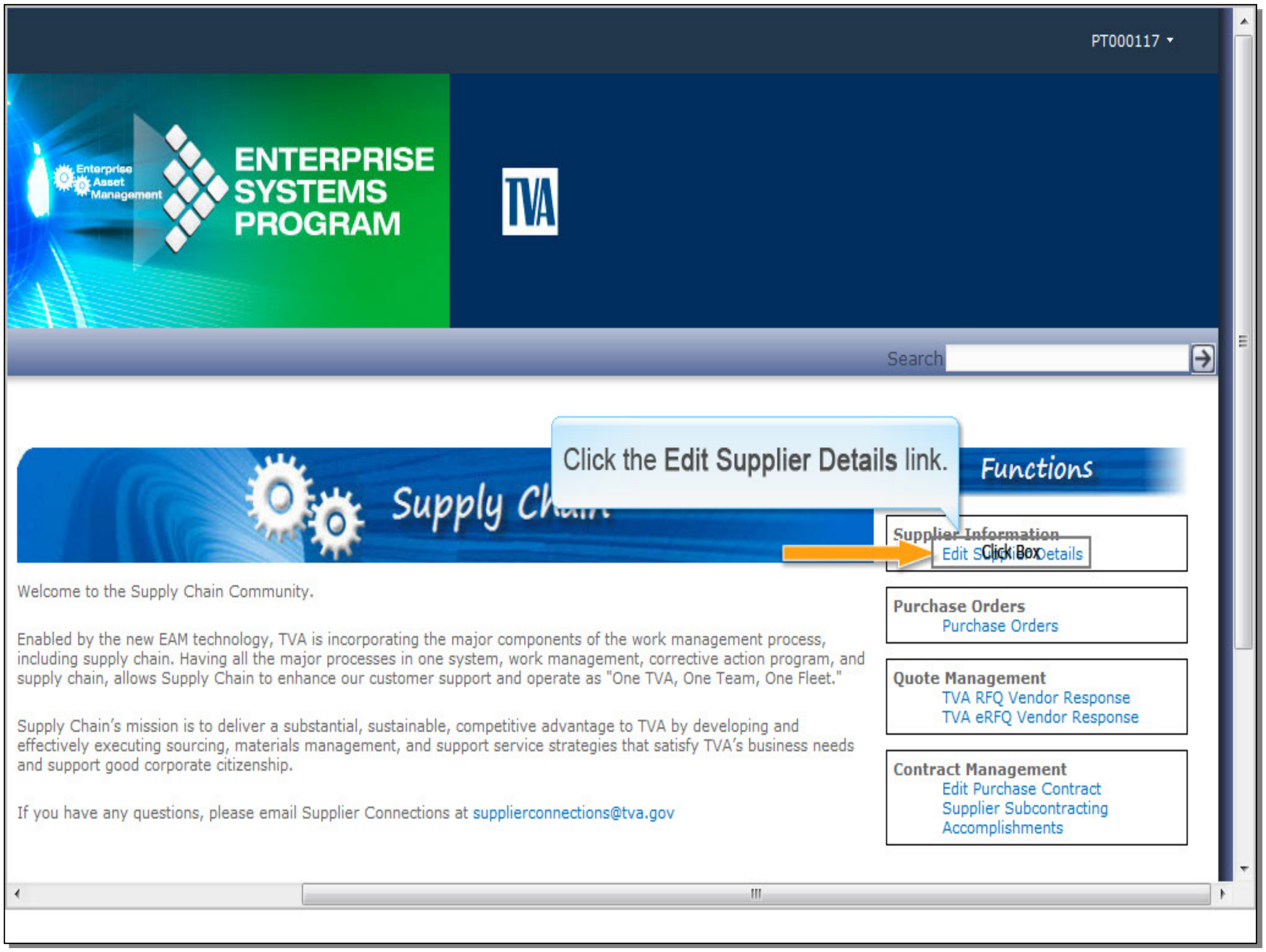
Contains detailed information about TVA vendors.

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

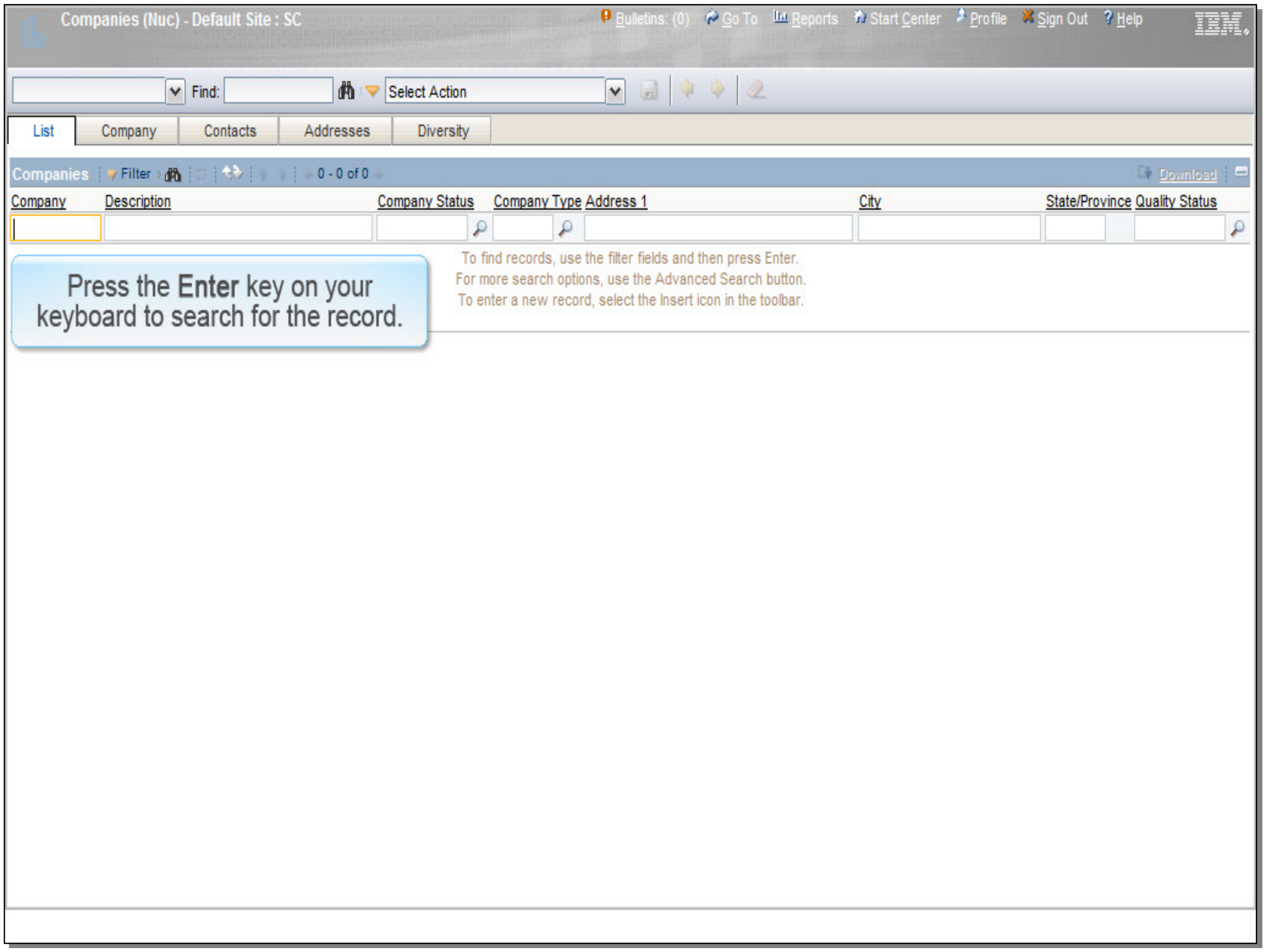
We'll begin from the Supply Chain portal, where we've scrolled to the right side of the home page.

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

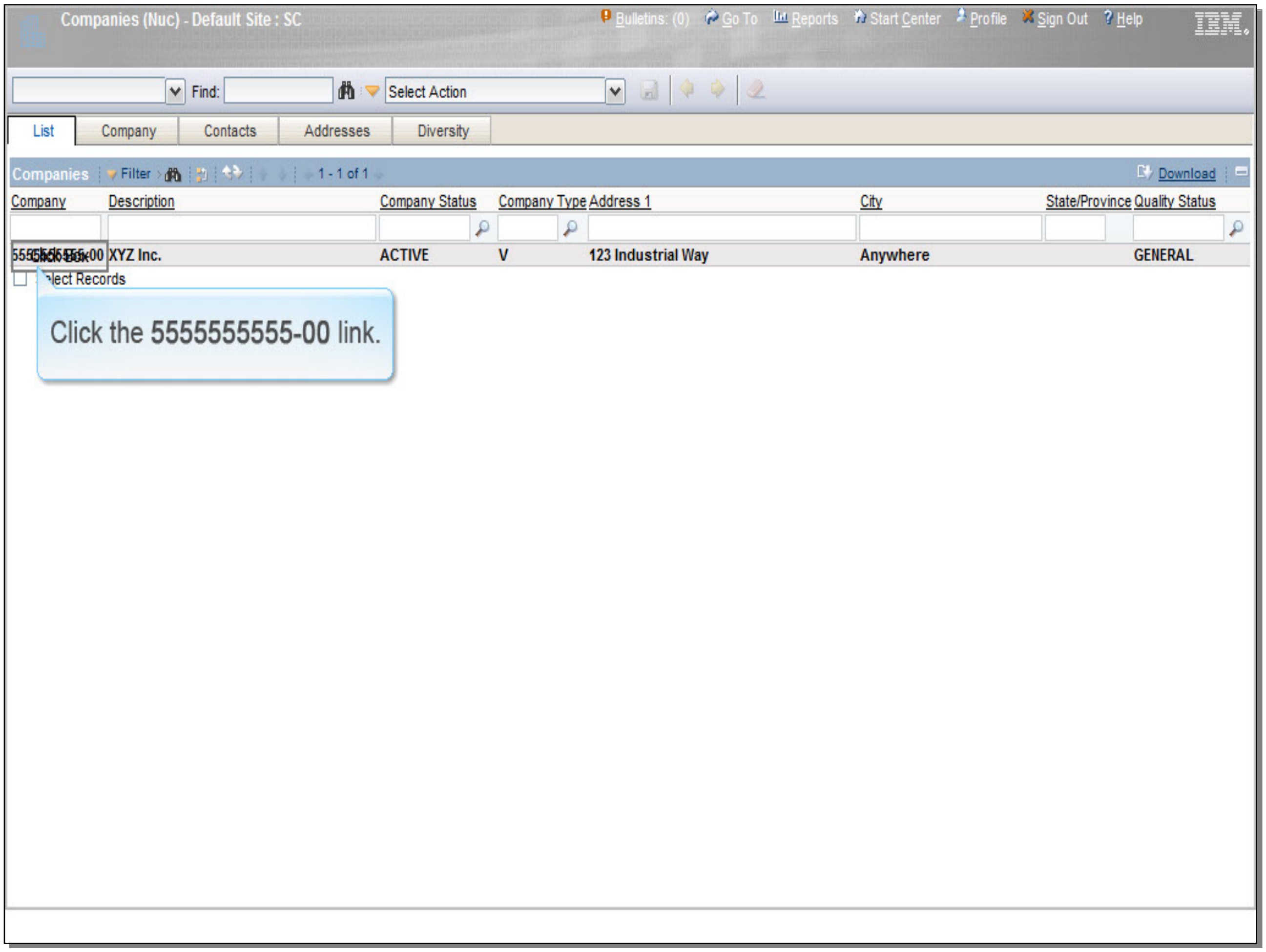
The List tab of the application is now displayed. The fields in this tab are used to search for records based on various criteria. However, the easiest way to search for your company's records is by pressing Enter in the Company field.

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



Slide notes

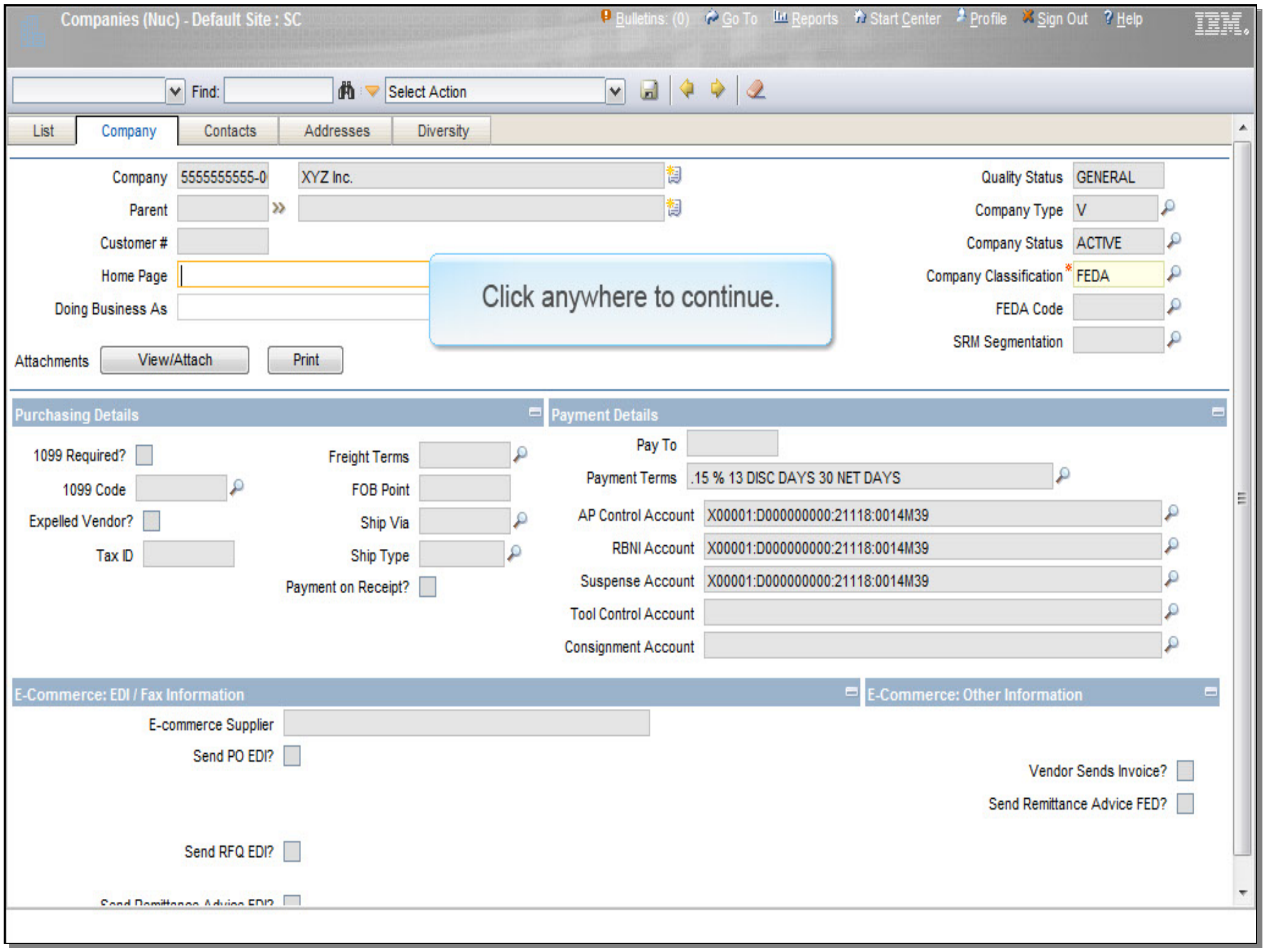
Maximo has located the record. If this company had more than one company record, they would also be displayed here.

Now click the Company number to open the record.

Text Captions

Click the **5555555555-00** link.

Slide 23 - Viewing the Company Record



Slide notes

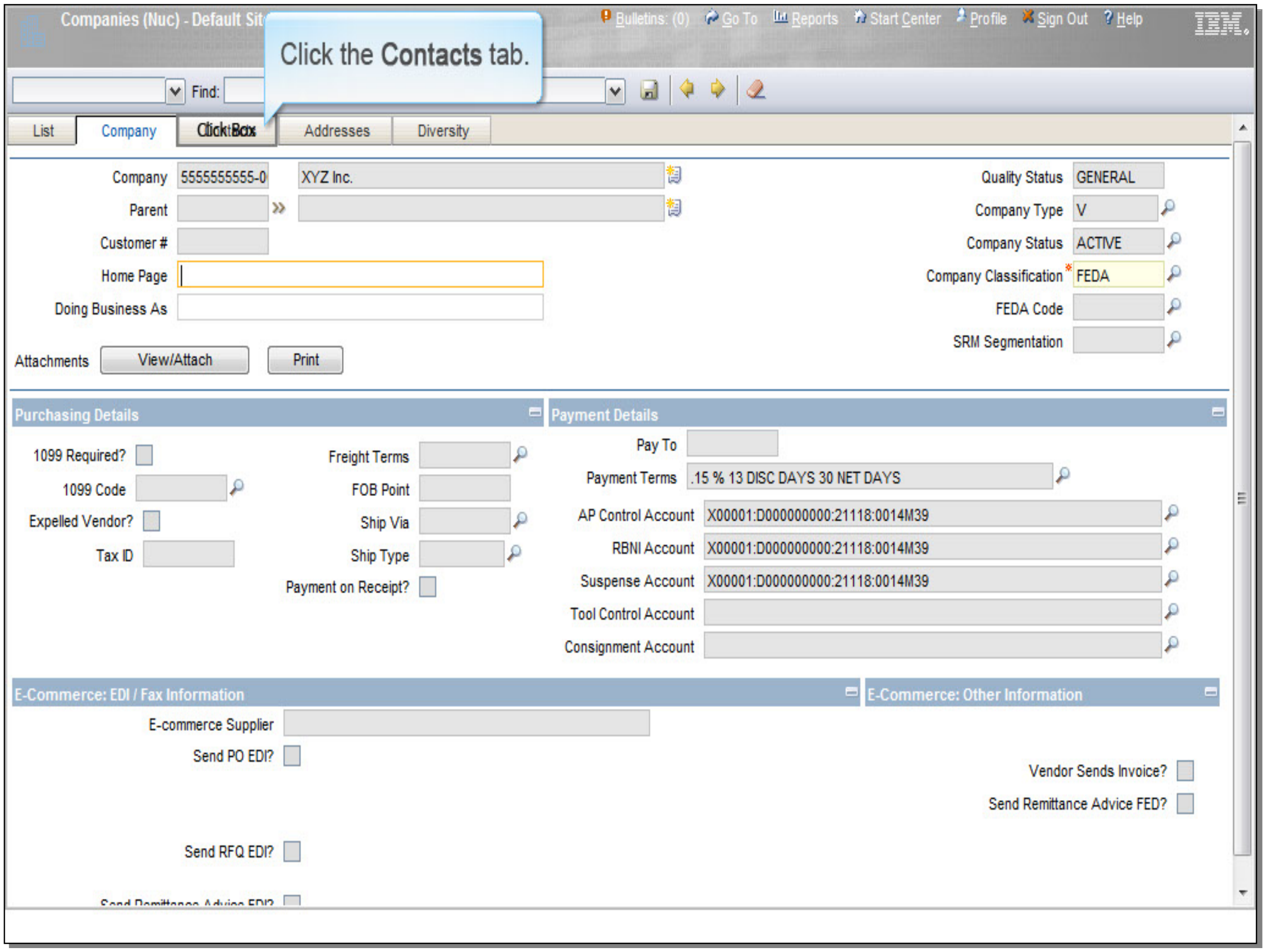
The record is now displayed in the Company tab. This page contains general information, such as the name and payment details.

Look this over and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 24 - Viewing the Company Record



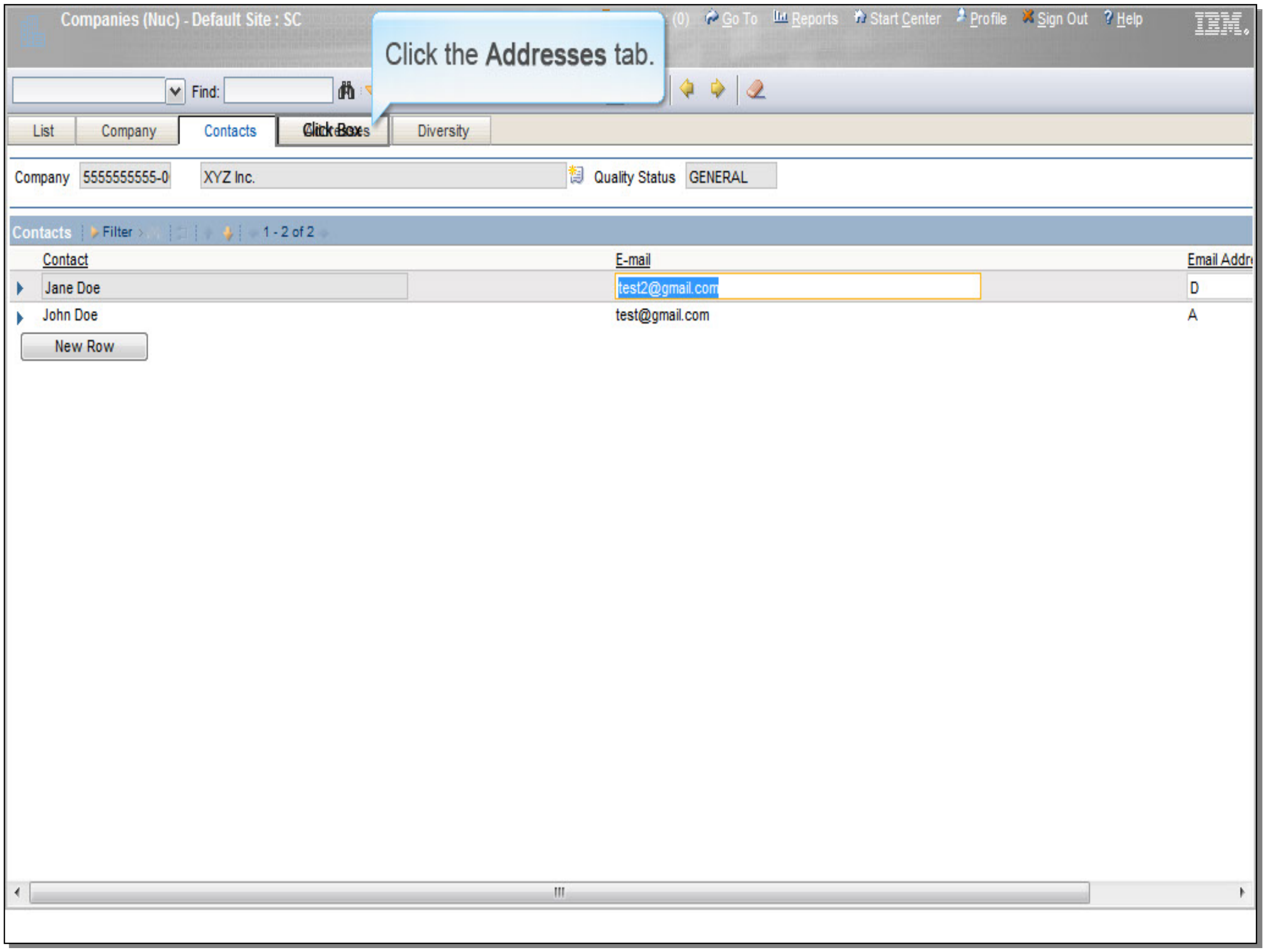
Slide notes

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

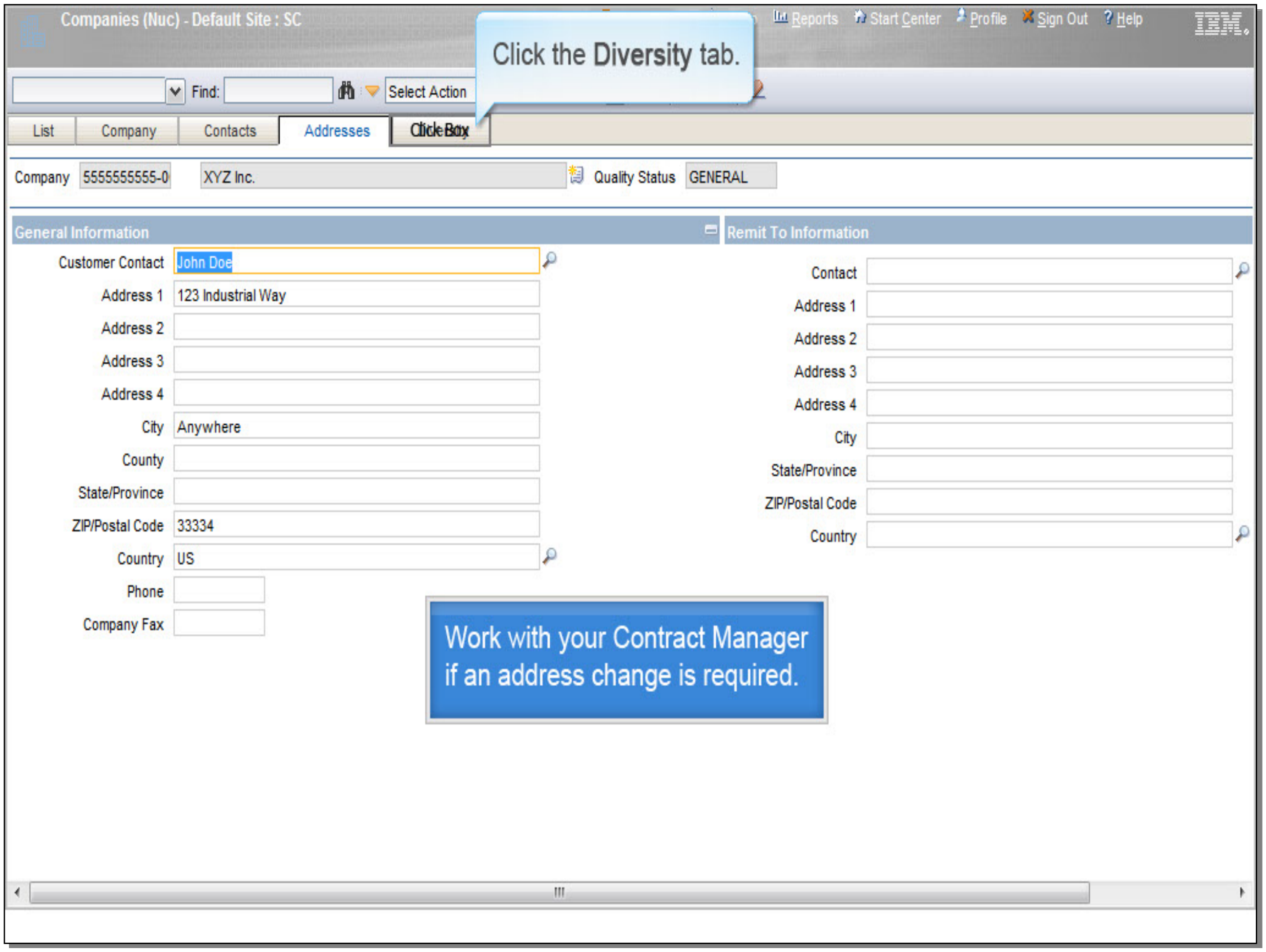
Here you see the contacts for this company. We'll return to this tab later to update some of the information.

Now click the Addresses tab.

Text Captions

Click the **Addresses** tab.

Slide 26 - Viewing the Company Record



Slide notes

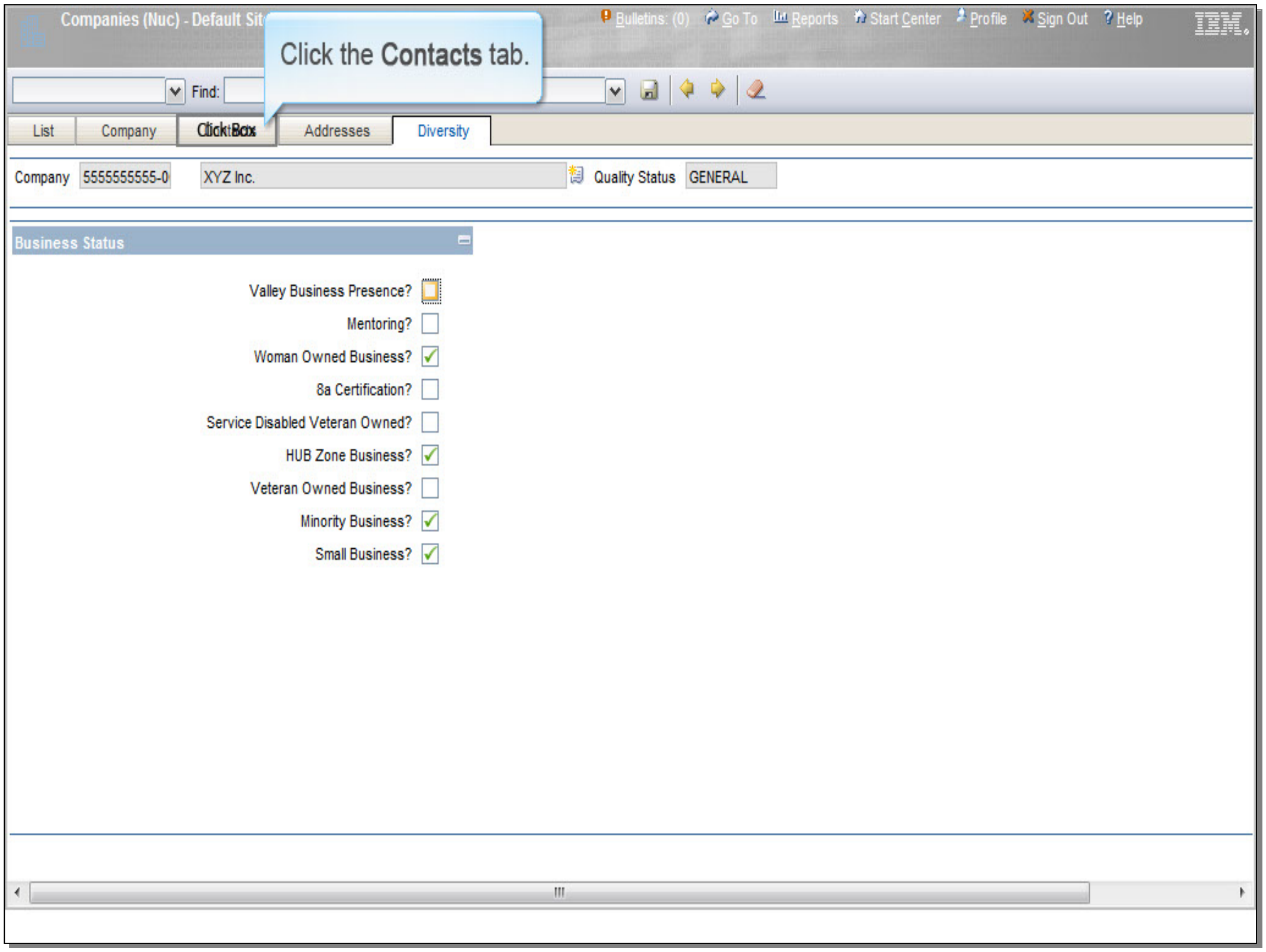
Although you can use this tab to update the company address, be sure to work with your Contract Manager if an address change is required. TVA will need to update address changes in related records.

Look this over, and then click the Diversity tab.

Text Captions

Click the **Diversity** tab.

Slide 27 - Viewing the Company Record



Slide notes

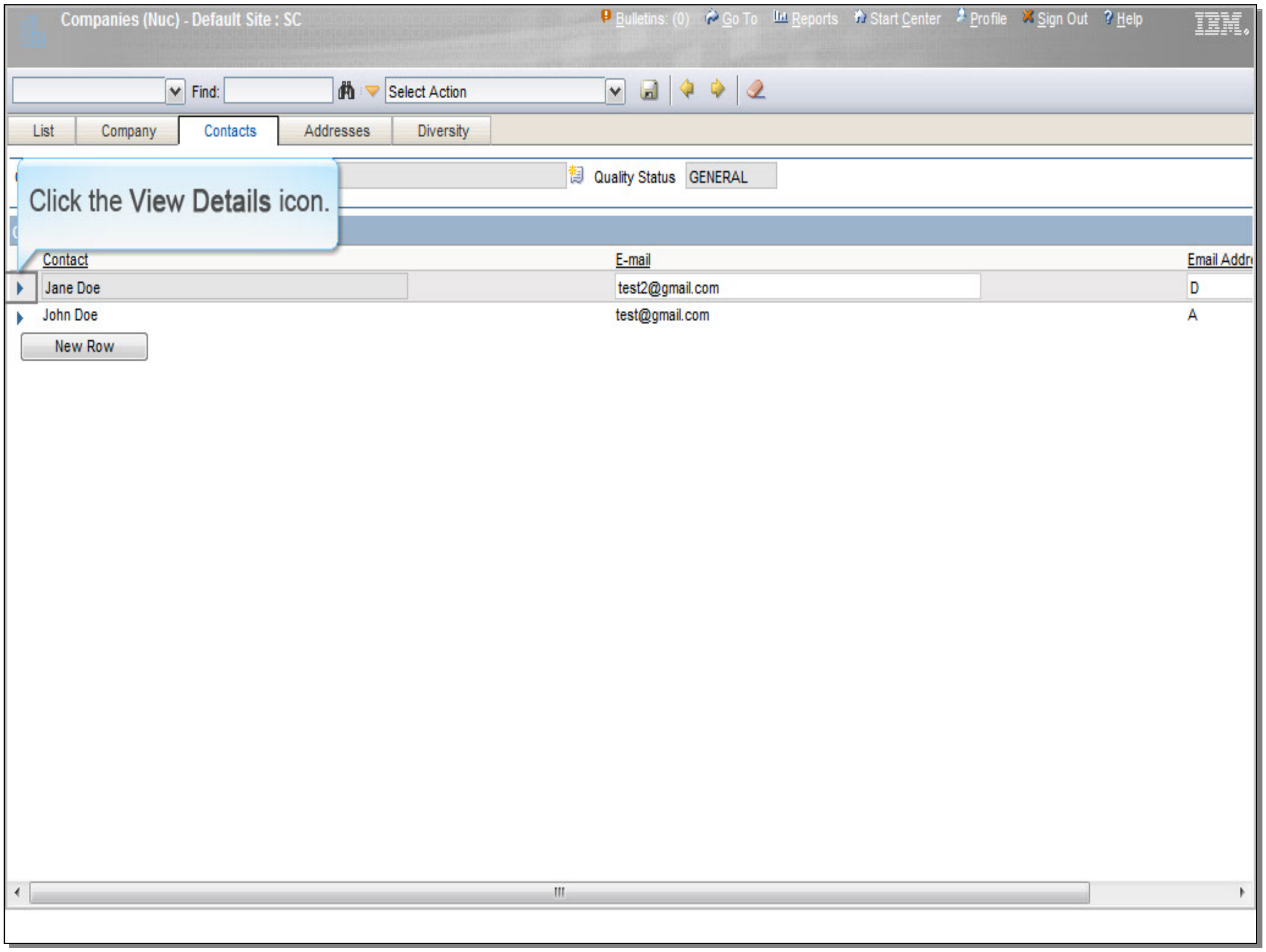
The Business Status can be updated as relevant.

Now let's return to the Contacts tab.

Text Captions

Click the **Contacts** tab.

Slide 28 - Editing the Record



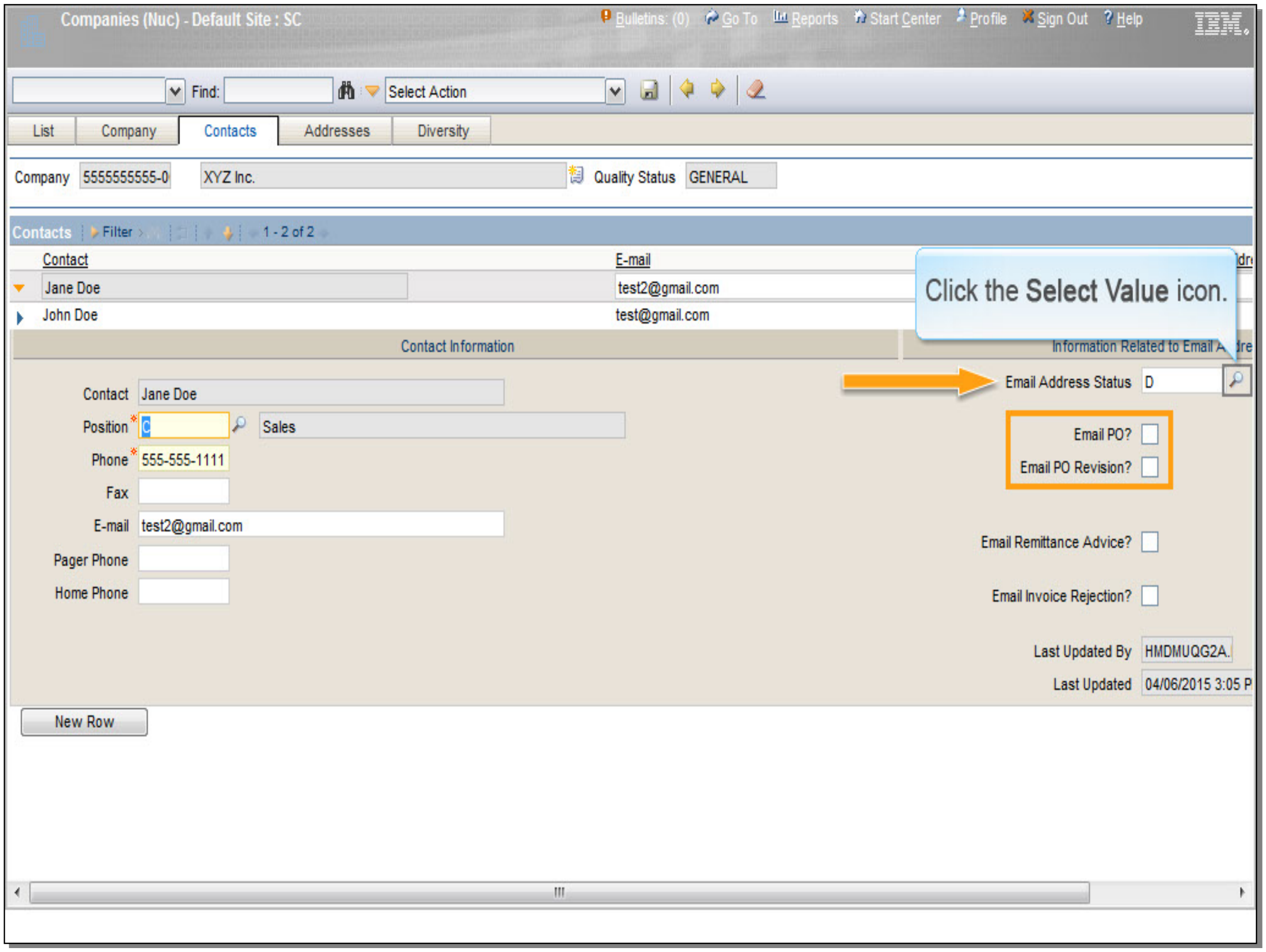
Slide notes

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



Slide notes

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

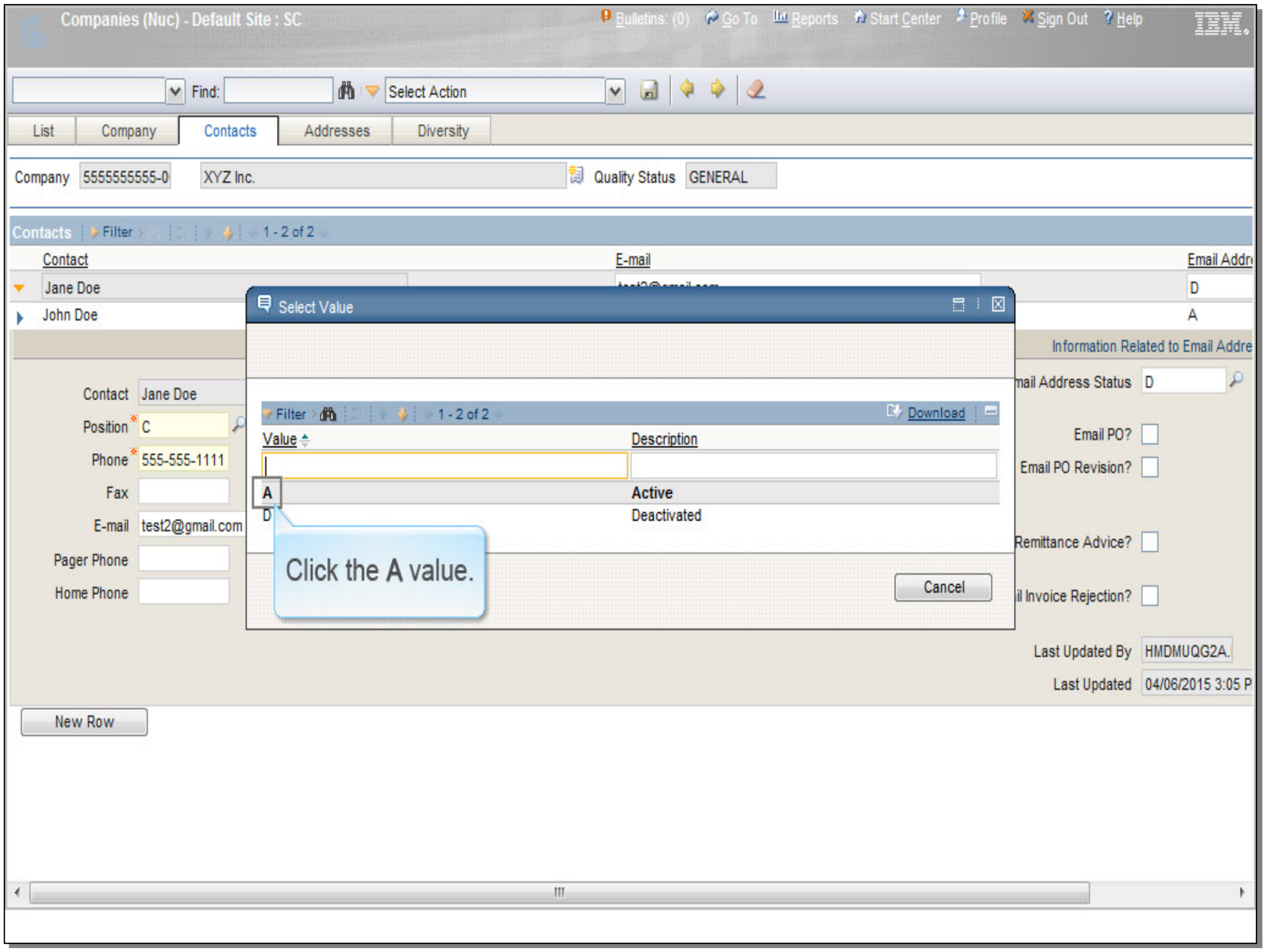
The Email Address Status field indicates whether this contact will receive THESE email messages from TVA. Currently, the status is D for Deactivated. Let's change this to Active, so that this person receives both of these messages.

Follow the instructions on the screen.

Text Captions

Click the **Select Value** icon.

Slide 30 - Editing the Record

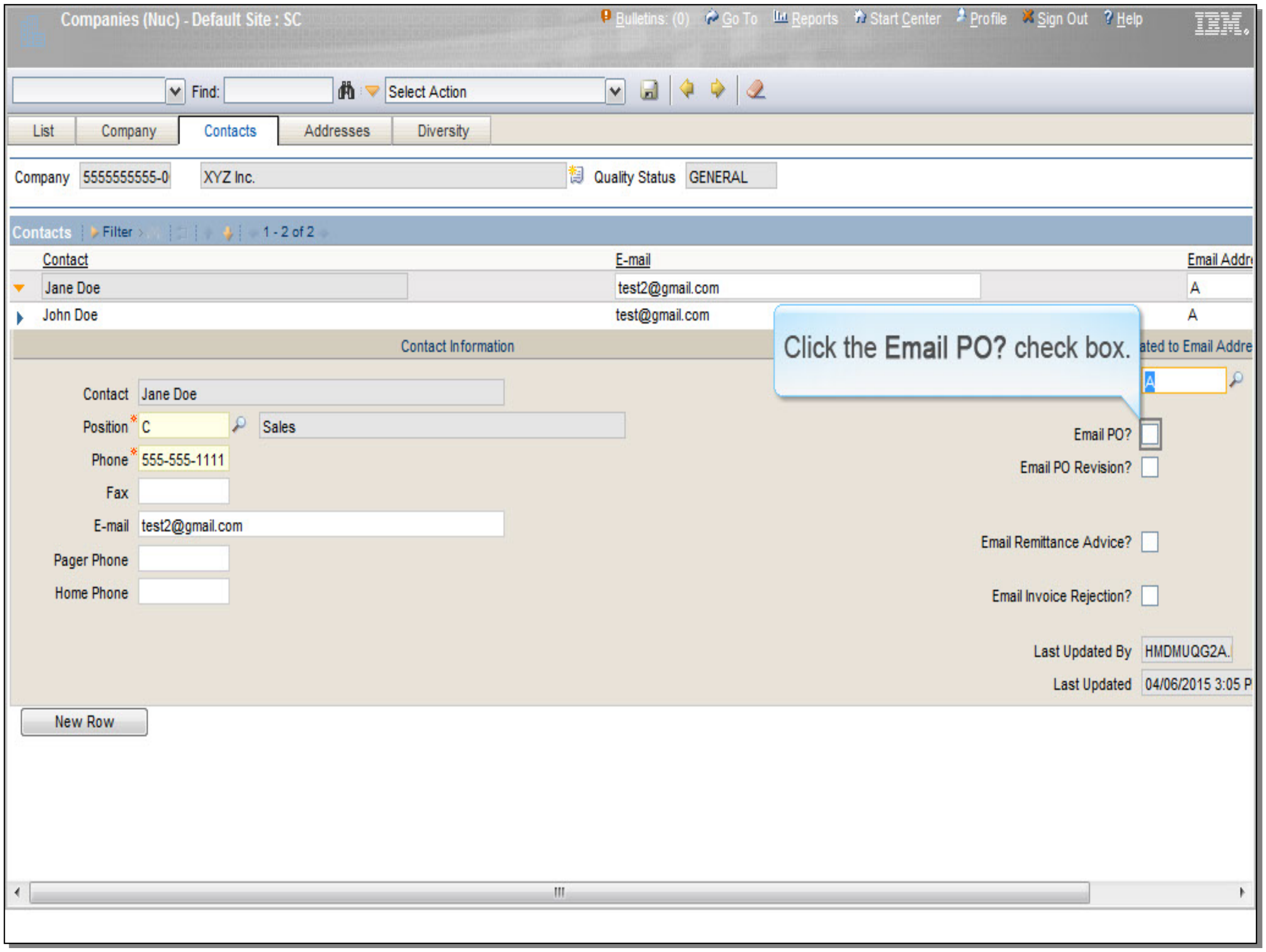


Slide notes

Text Captions

Click the **A** value.

Slide 31 - Editing the Record

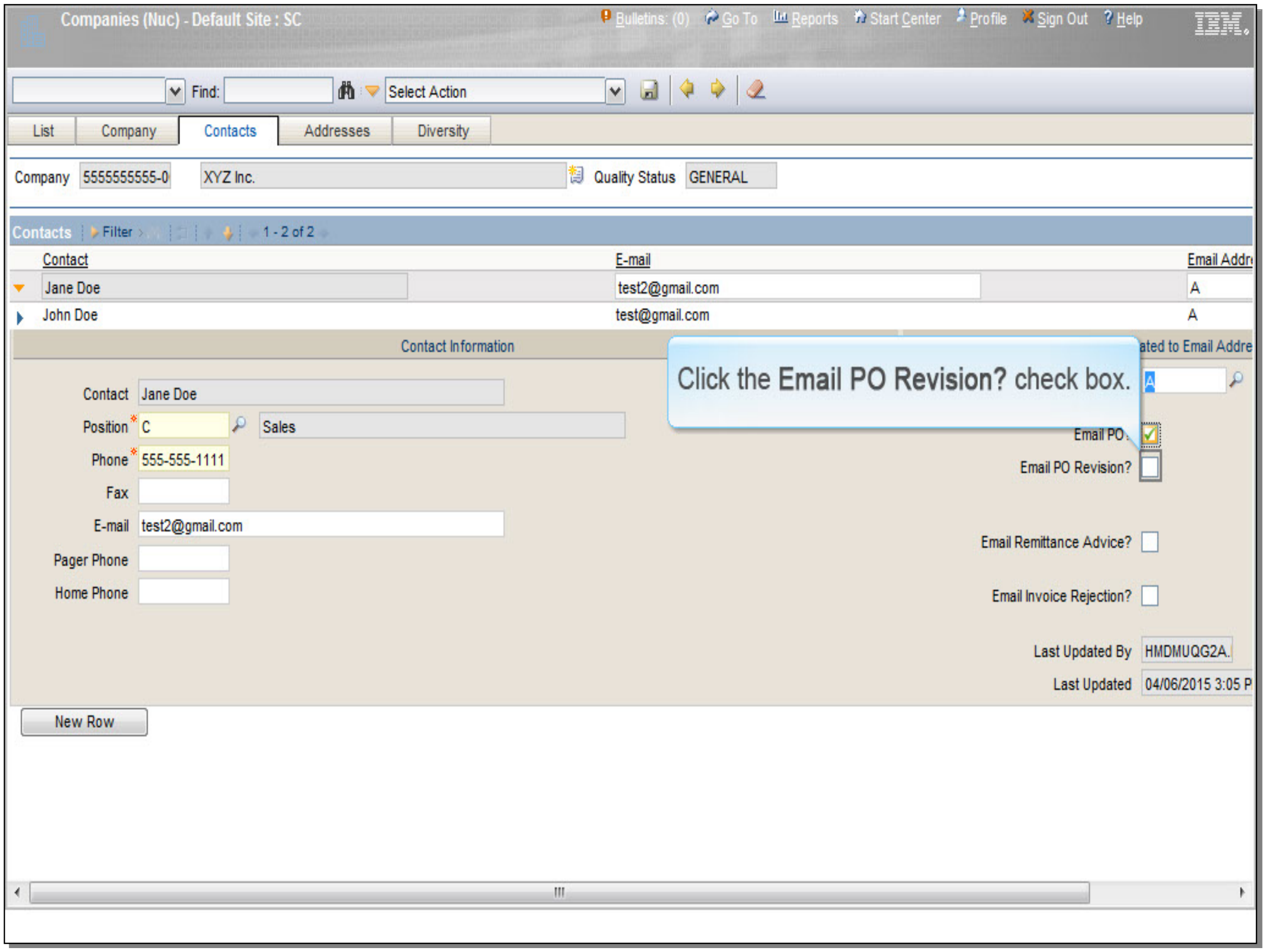


Slide notes

Text Captions

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

Slide 32 - Editing the Record

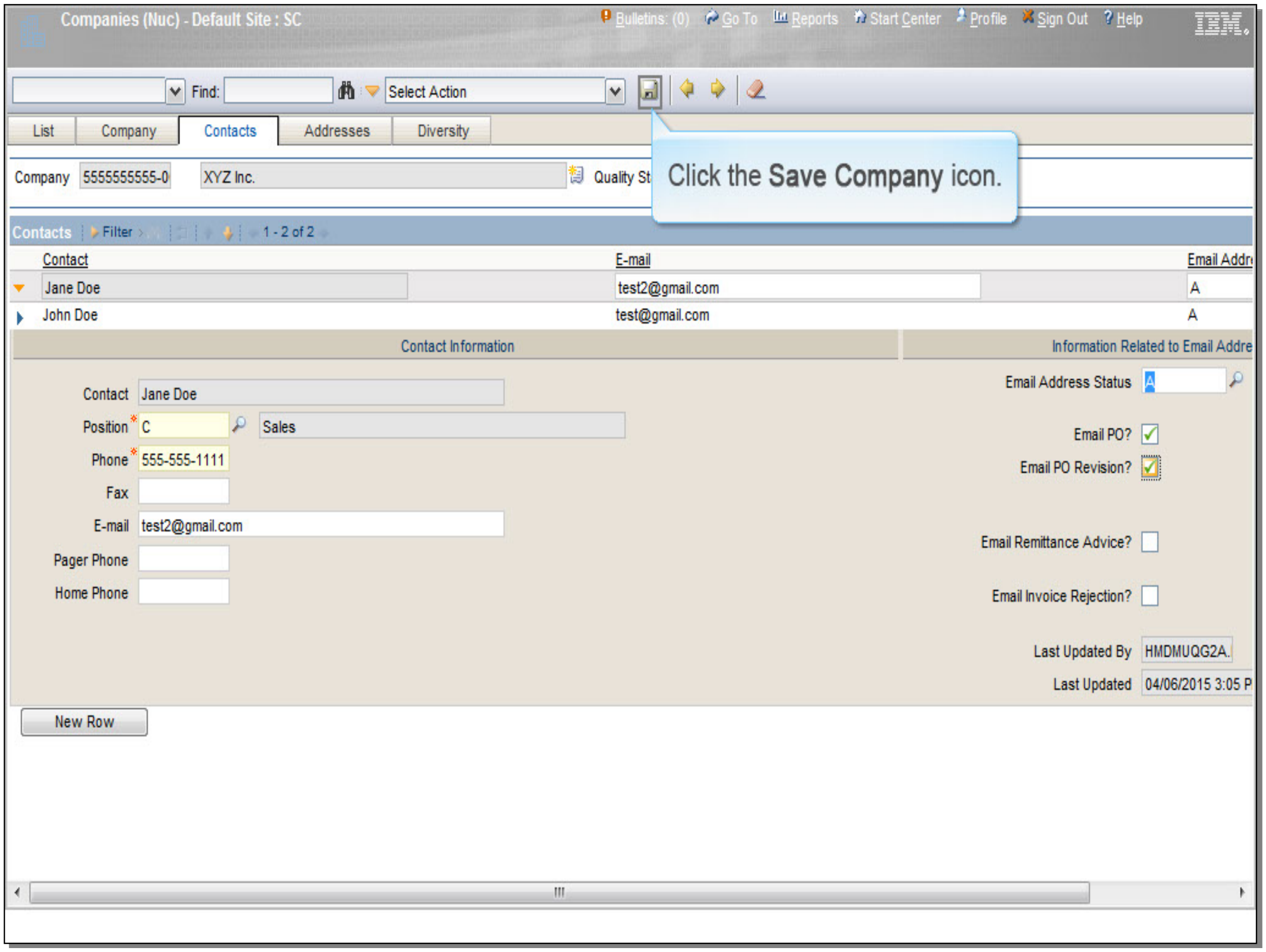


Slide notes

Text Captions

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

Slide 33 - Editing the Record



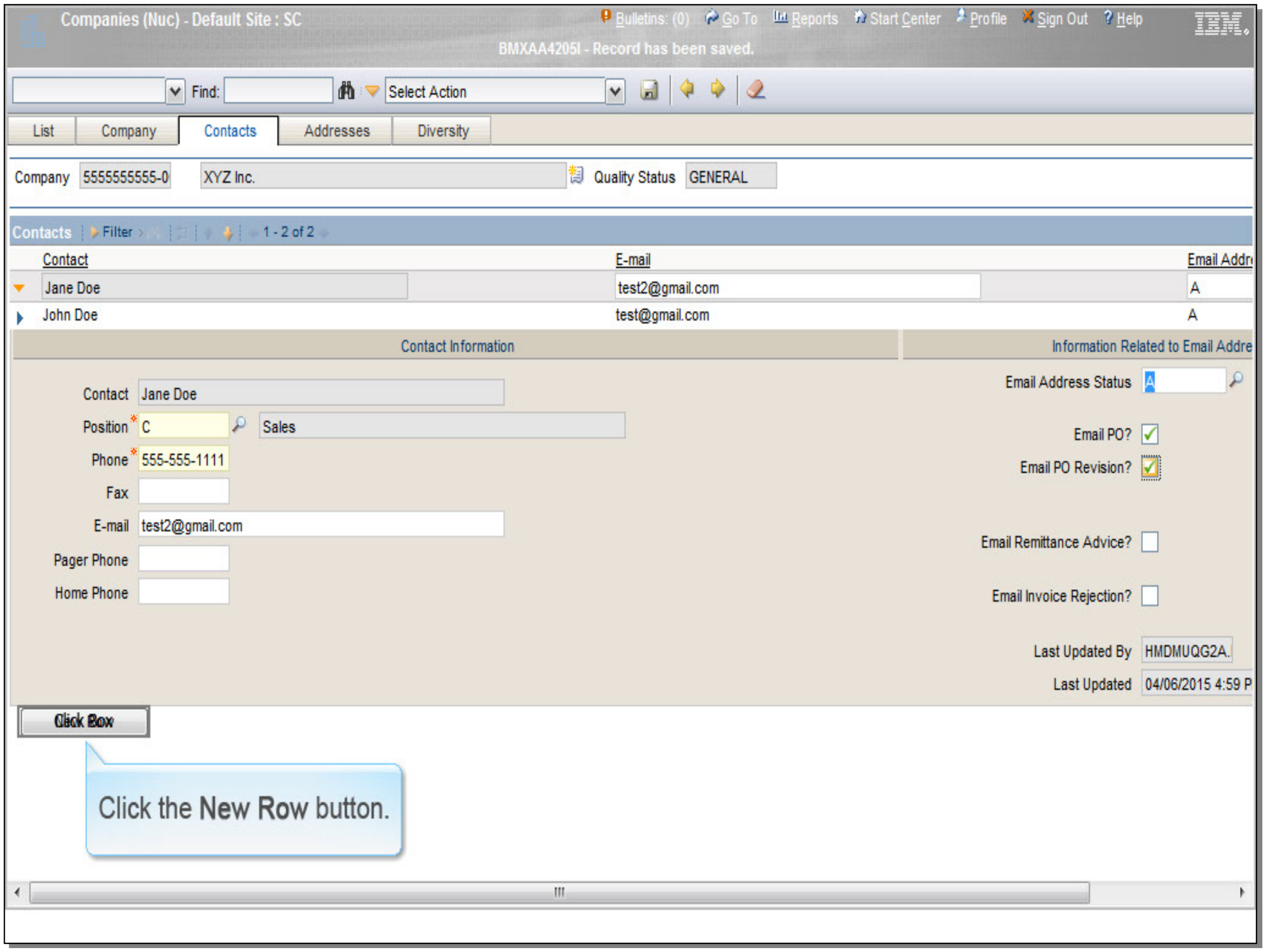
Slide notes

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



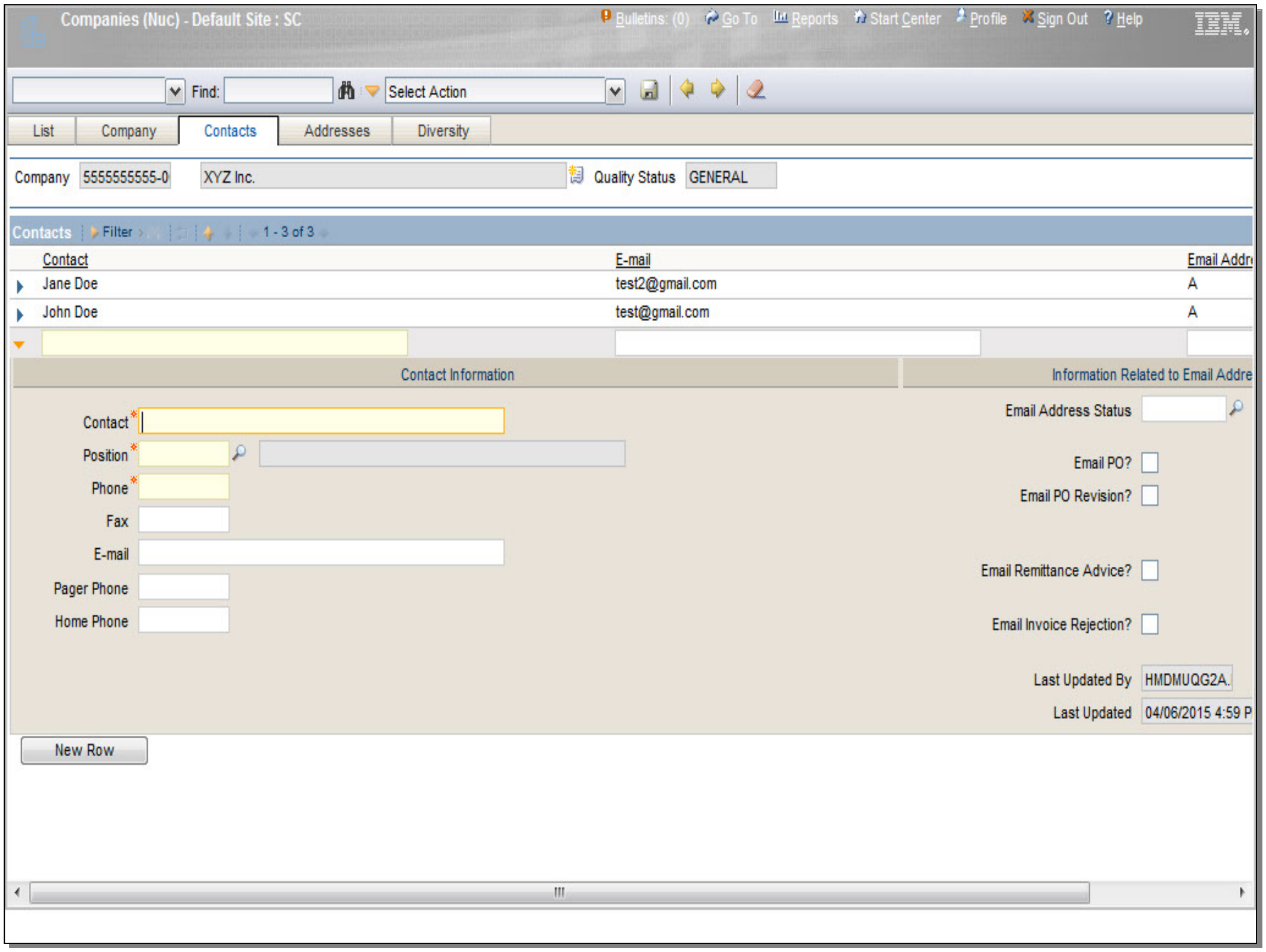
Slide notes

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

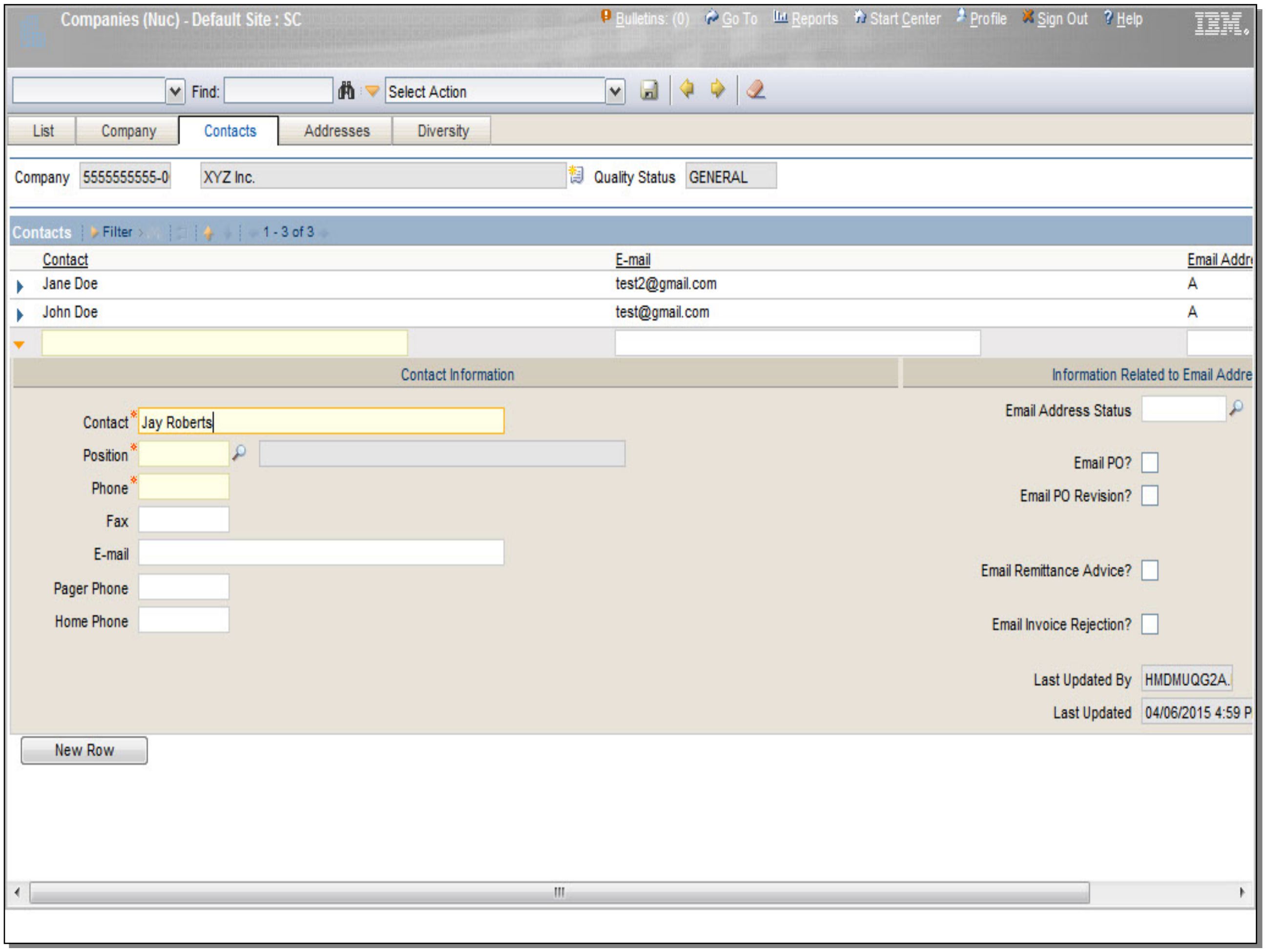


Slide notes

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

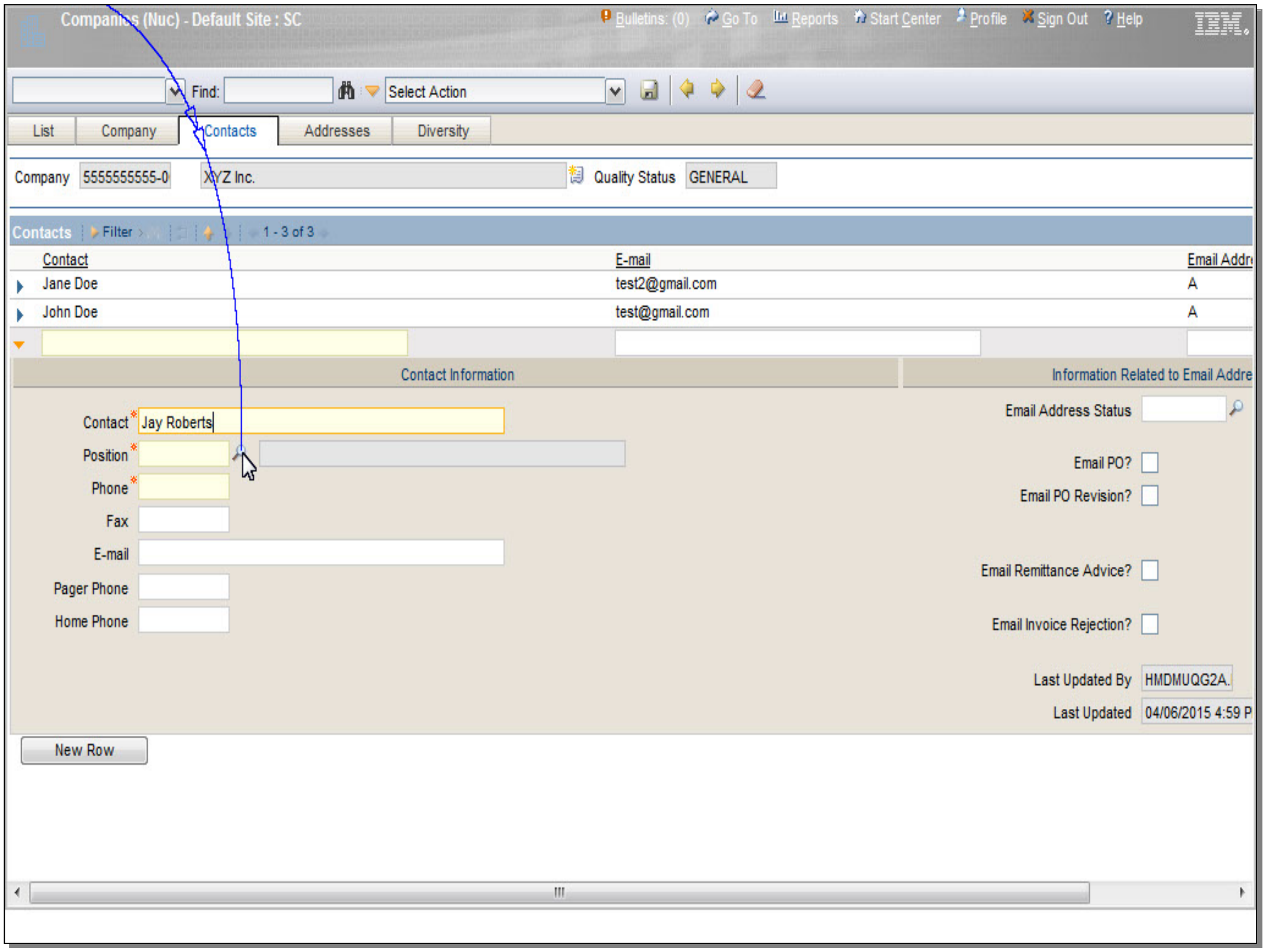
Slide 36 - Adding a Contact



Slide notes

Text Captions

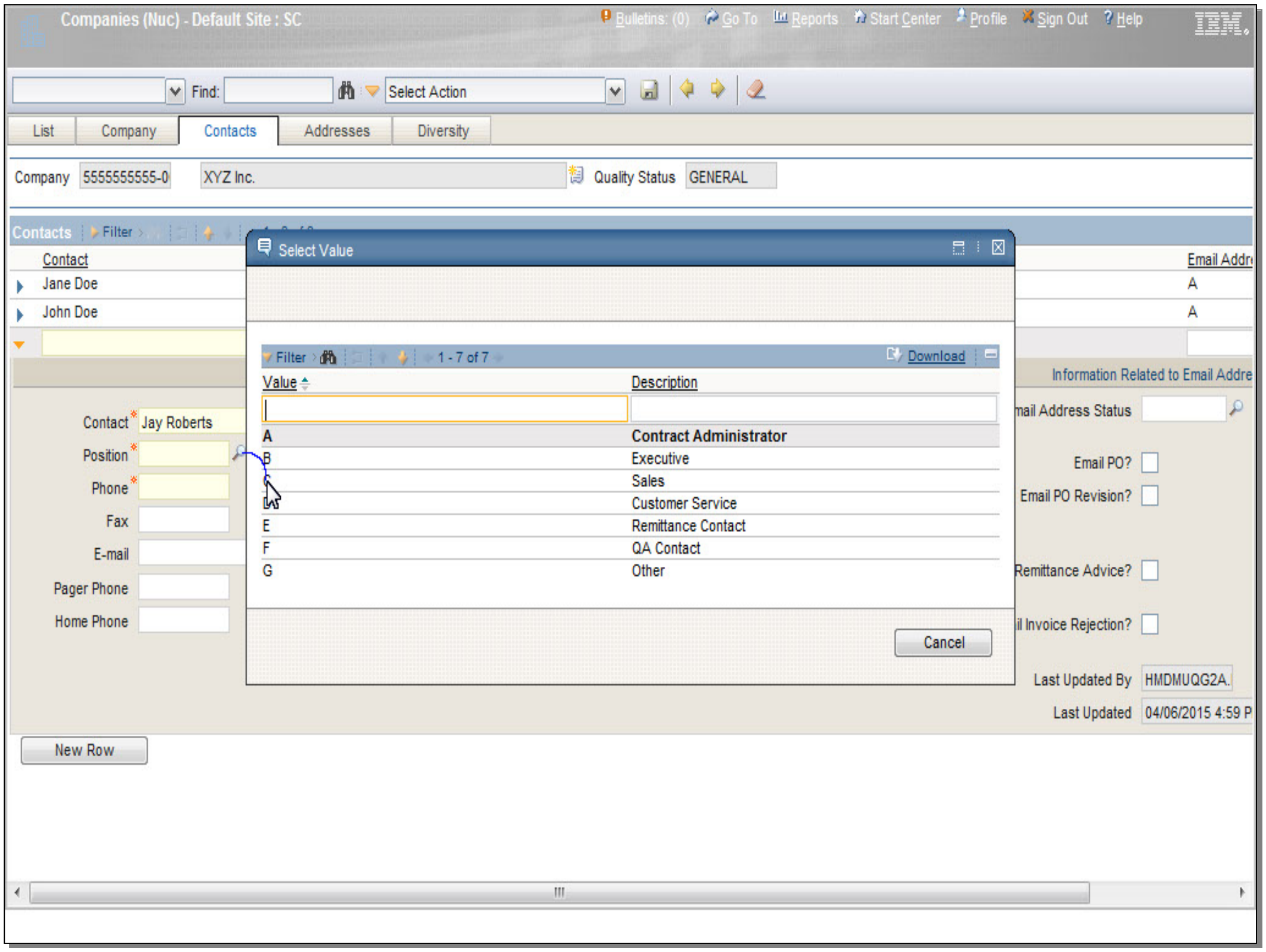
Slide 37 - Adding a Contact



Slide notes

Text Captions

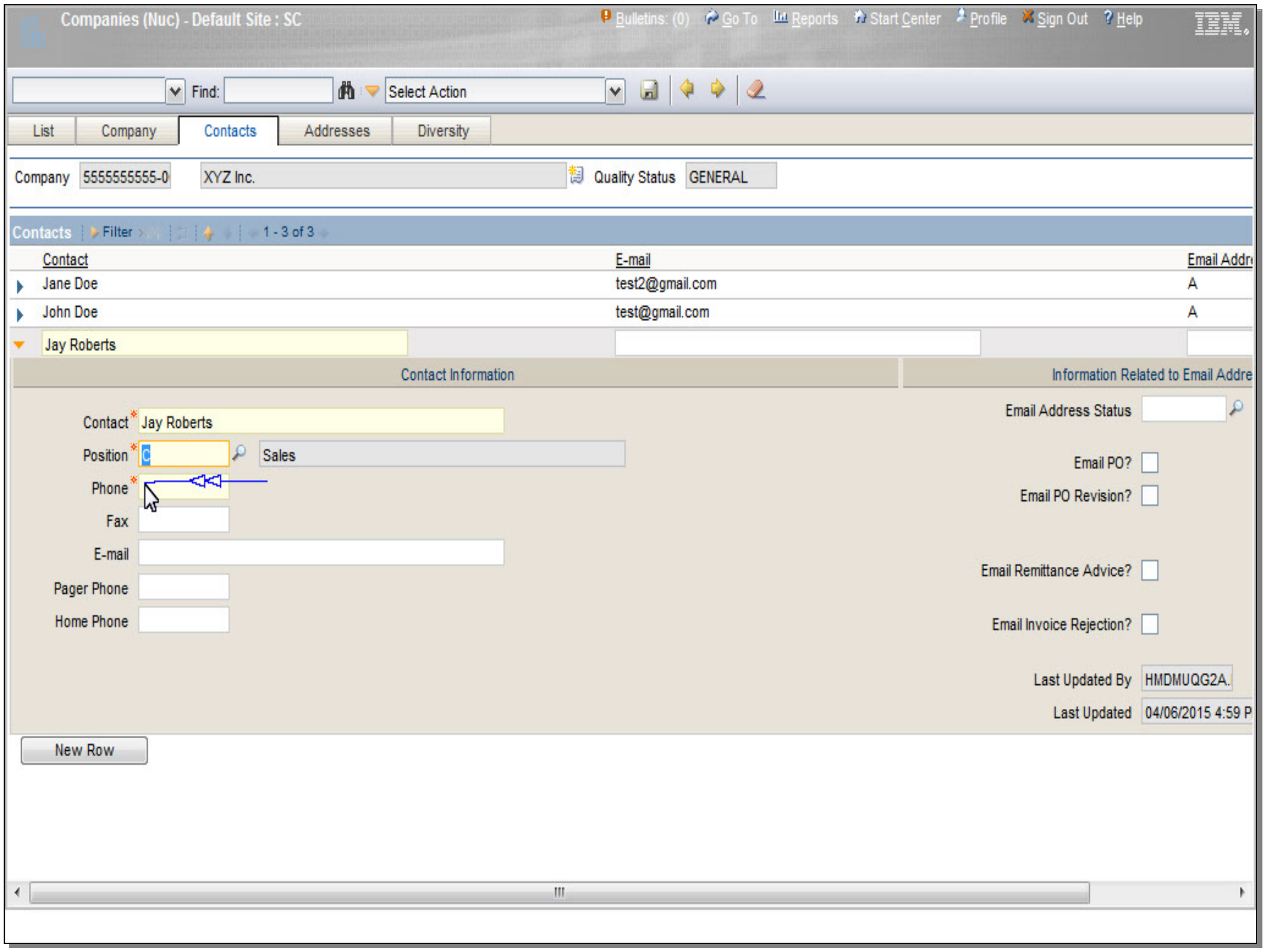
Slide 38 - Adding a Contact



Slide notes

Text Captions

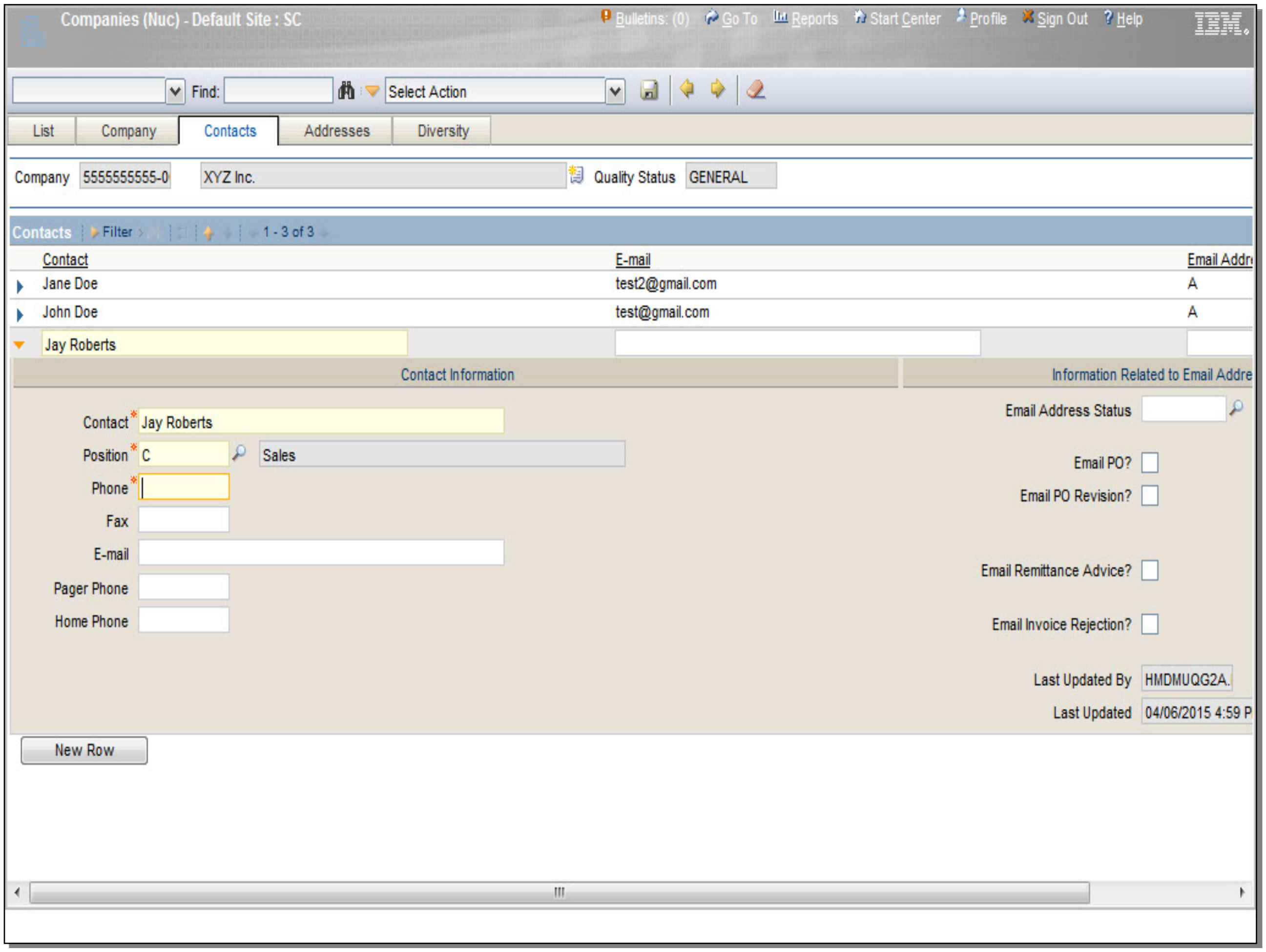
Slide 39 - Adding a Contact



Slide notes

Text Captions

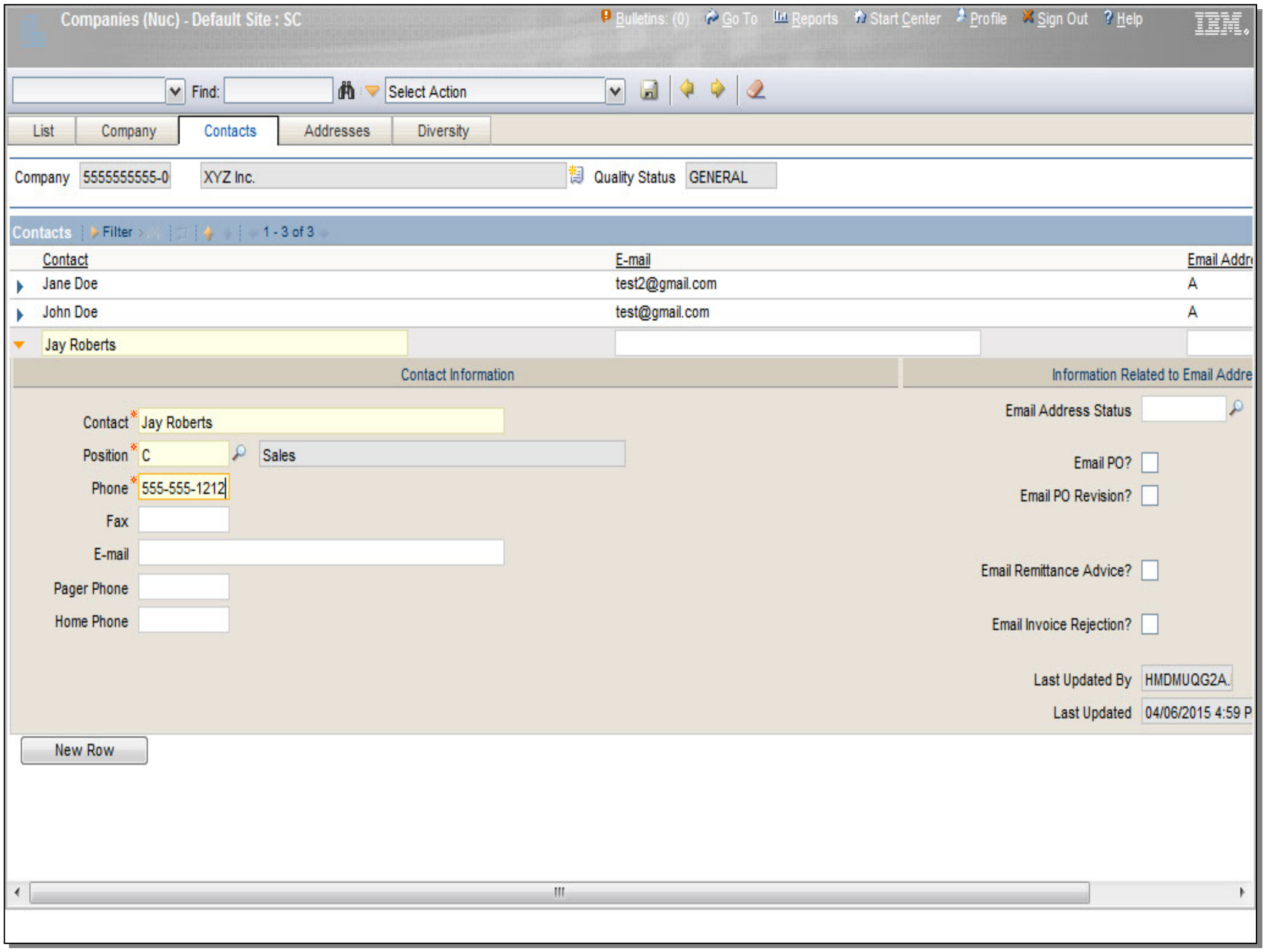
Slide 40 - Adding a Contact



Slide notes

Text Captions

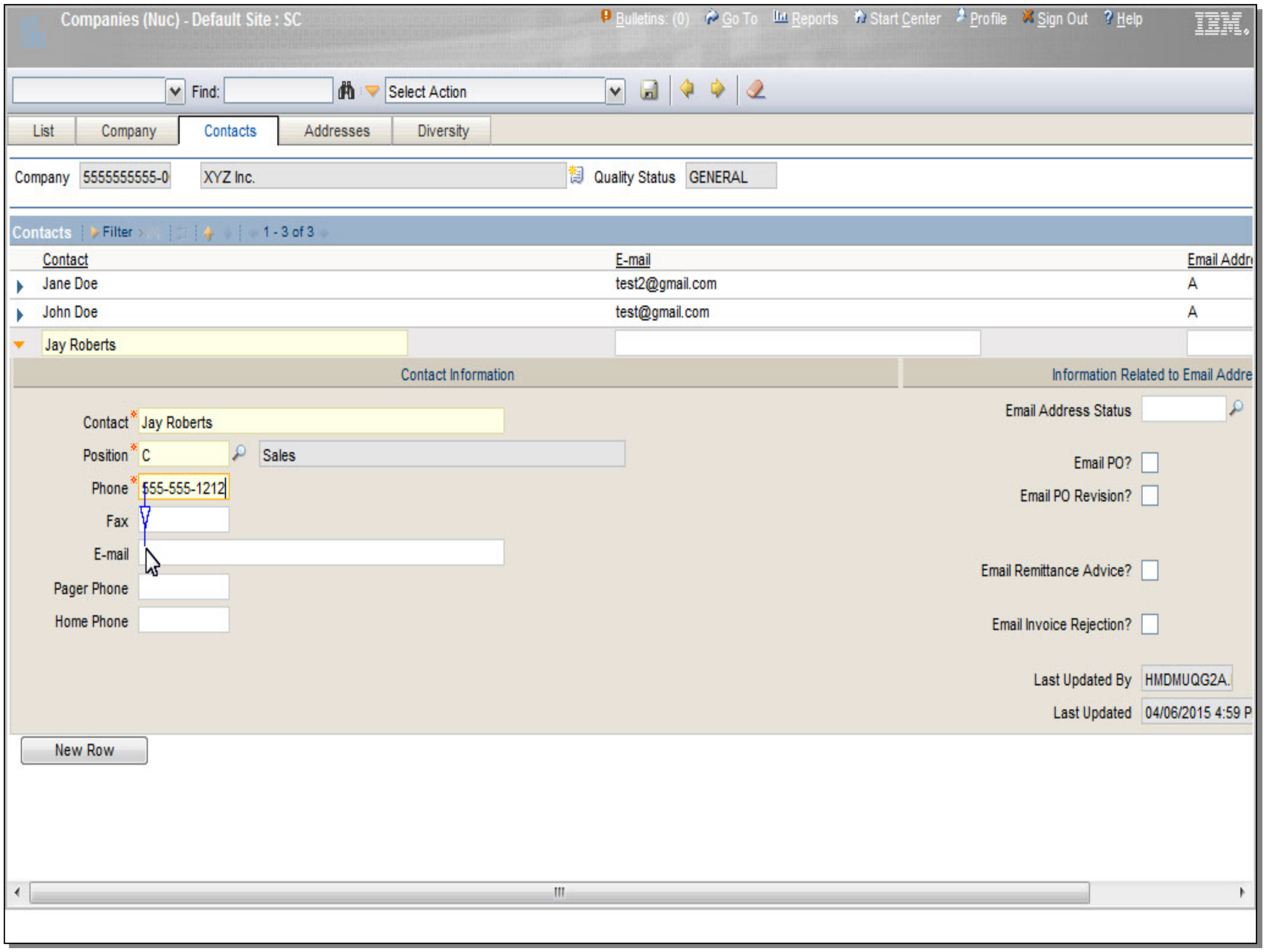
Slide 41 - Adding a Contact



Slide notes

Text Captions

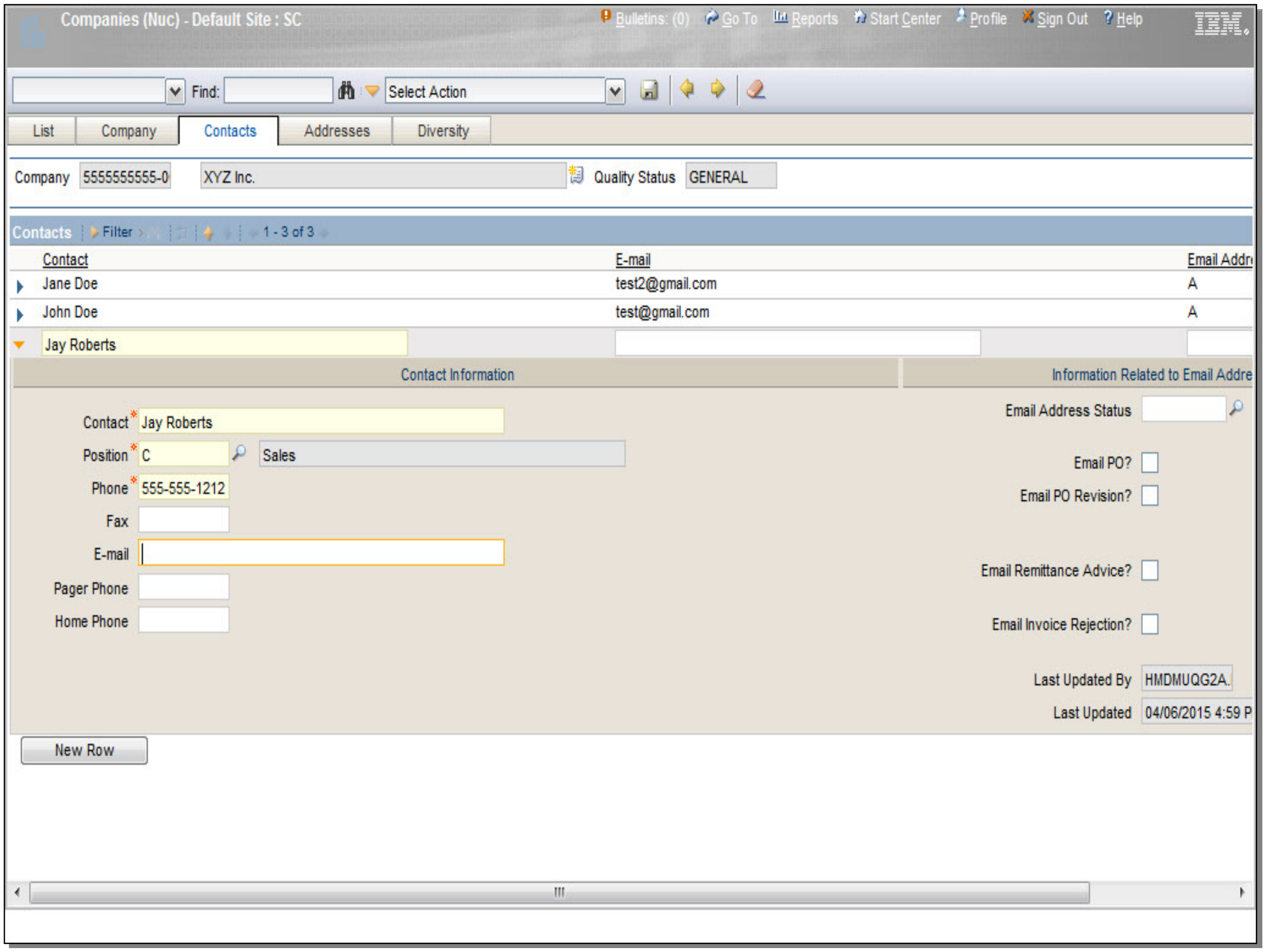
Slide 42 - Adding a Contact



Slide notes

Text Captions

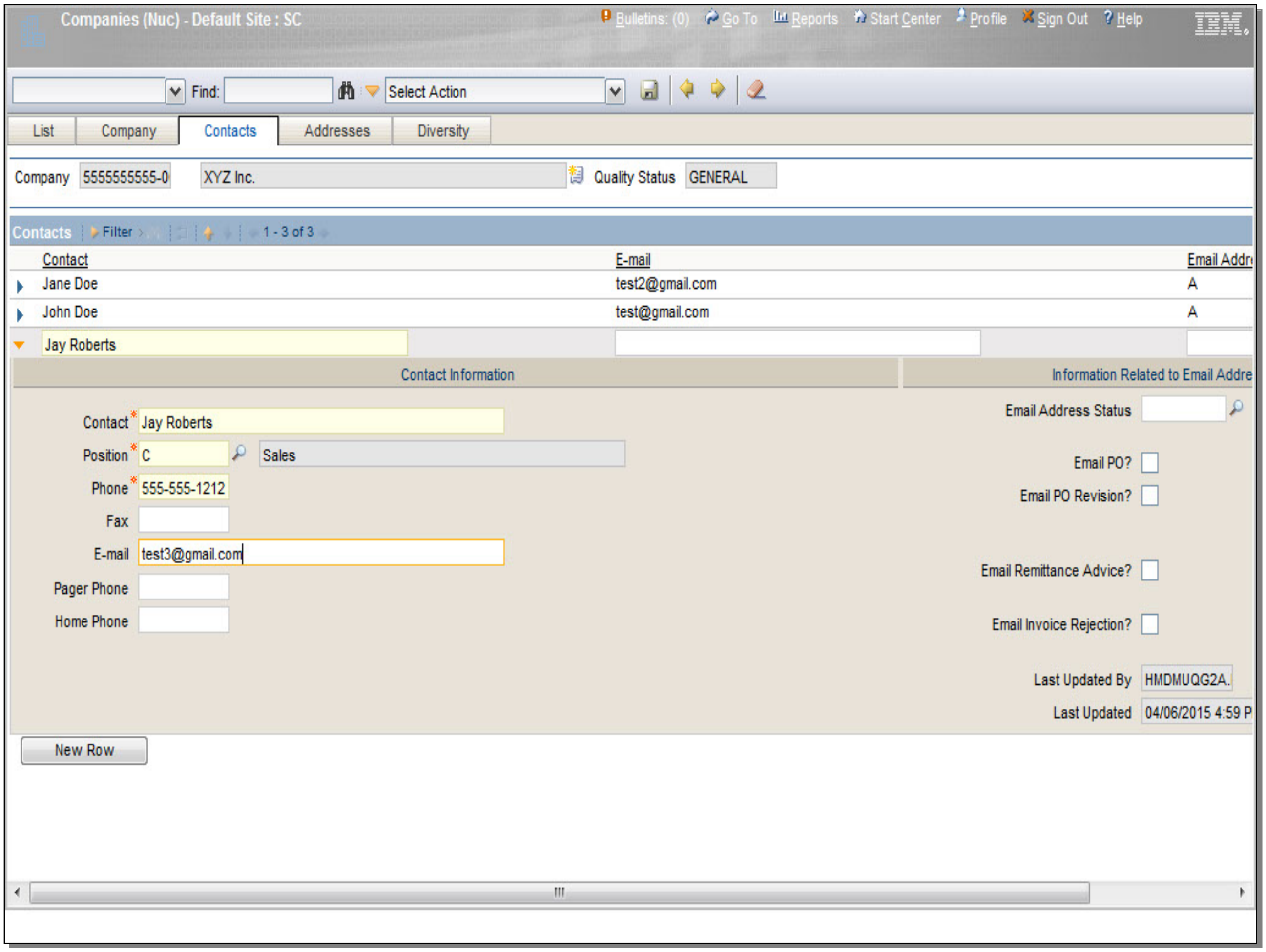
Slide 43 - Adding a Contact



Slide notes

Text Captions

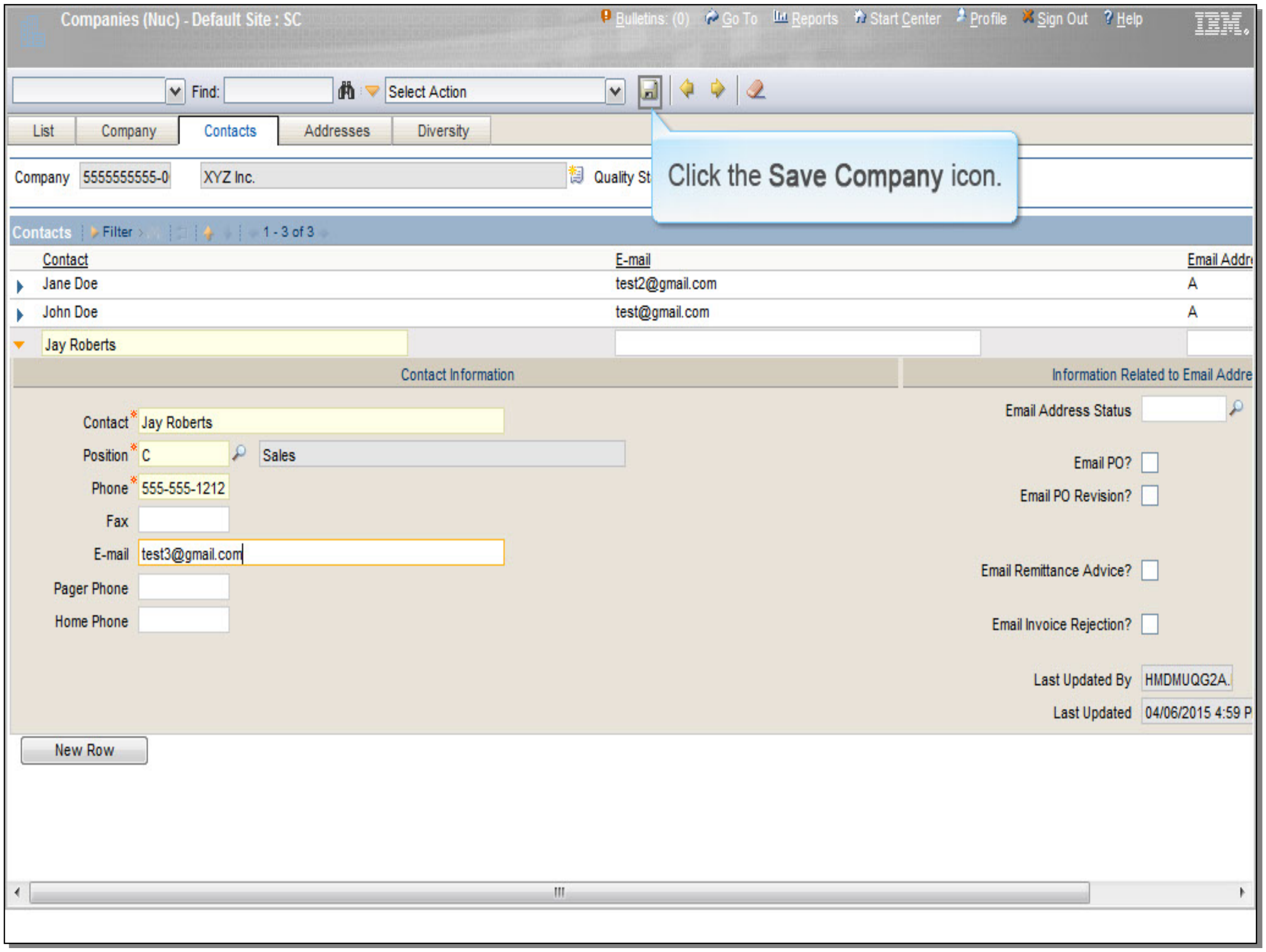
Slide 44 - Adding a Contact



Slide notes

Text Captions

Slide 45 - Adding a Contact



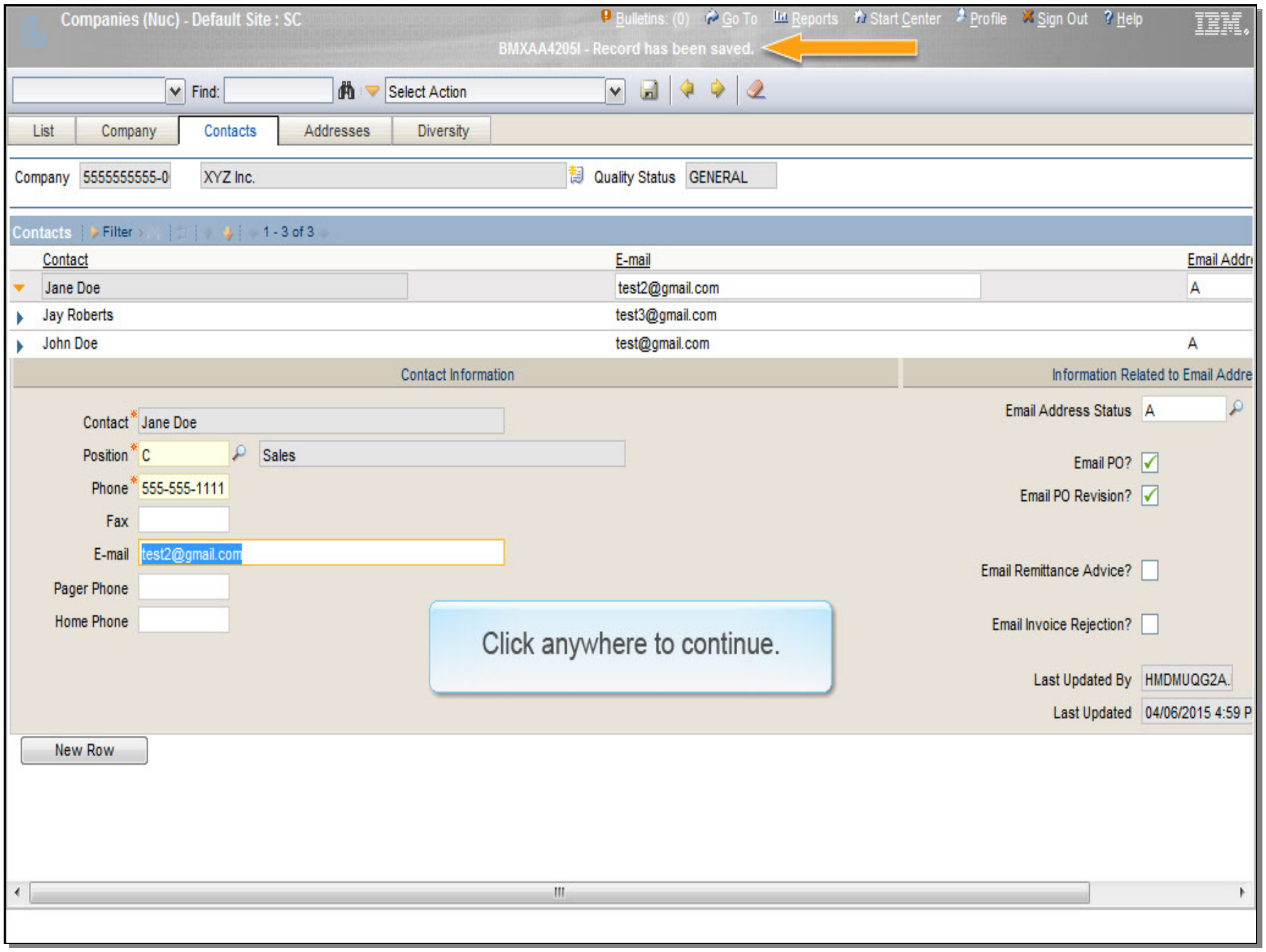
Slide notes

Now save the Company record again.

Text Captions

Click the **Save Company** icon.

Slide 46 - Adding a Contact



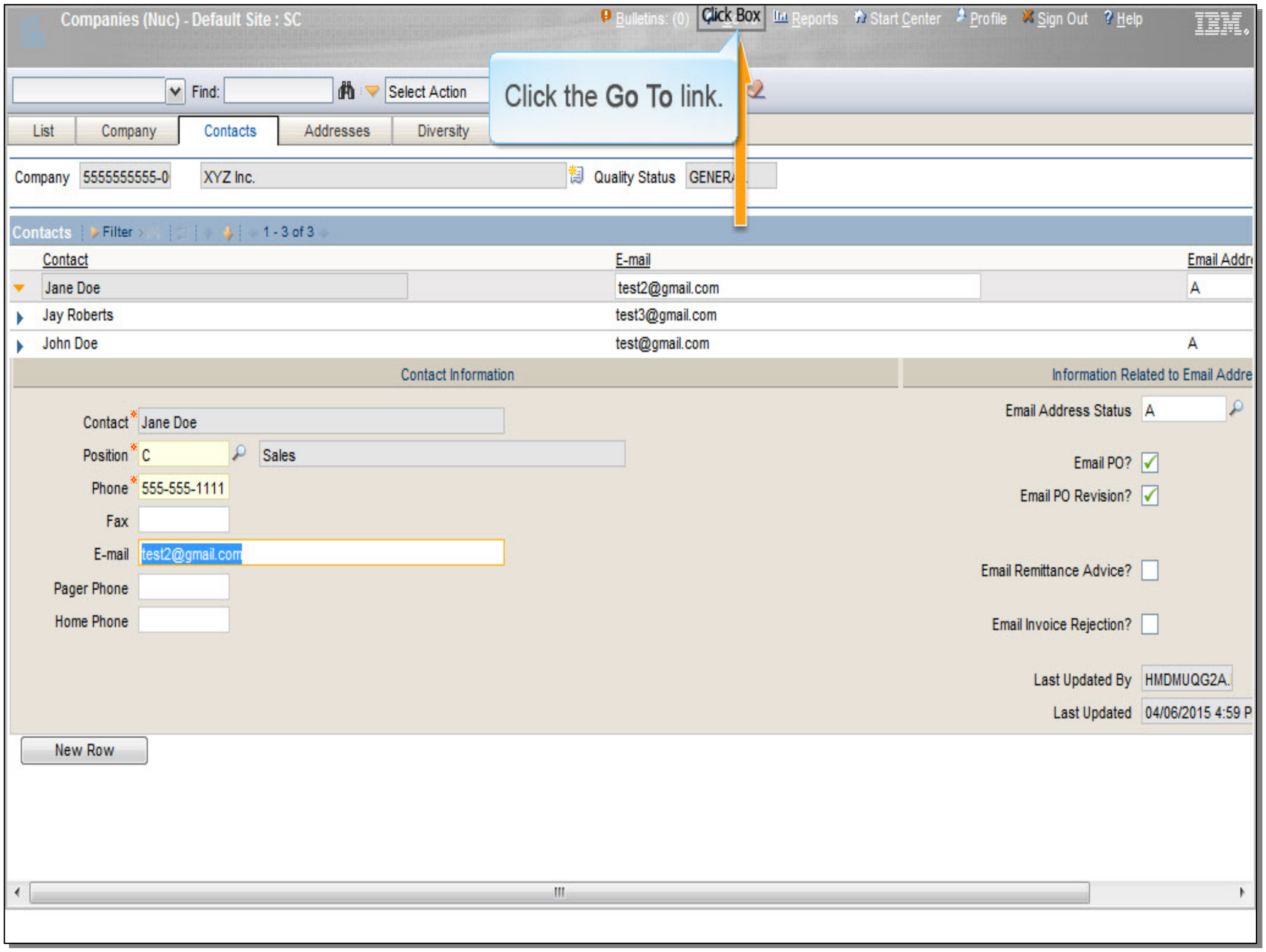
Slide notes

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



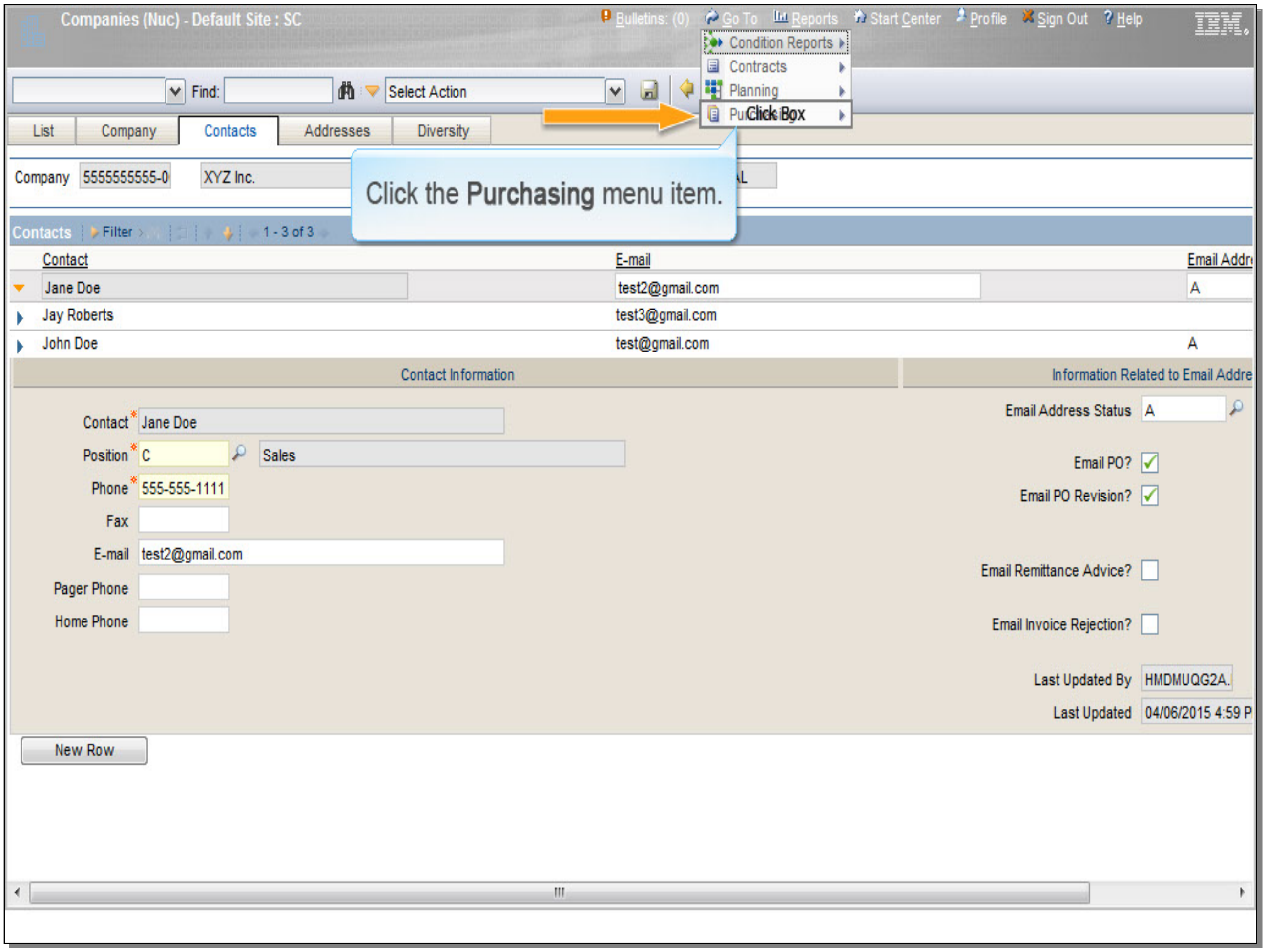
Slide notes

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



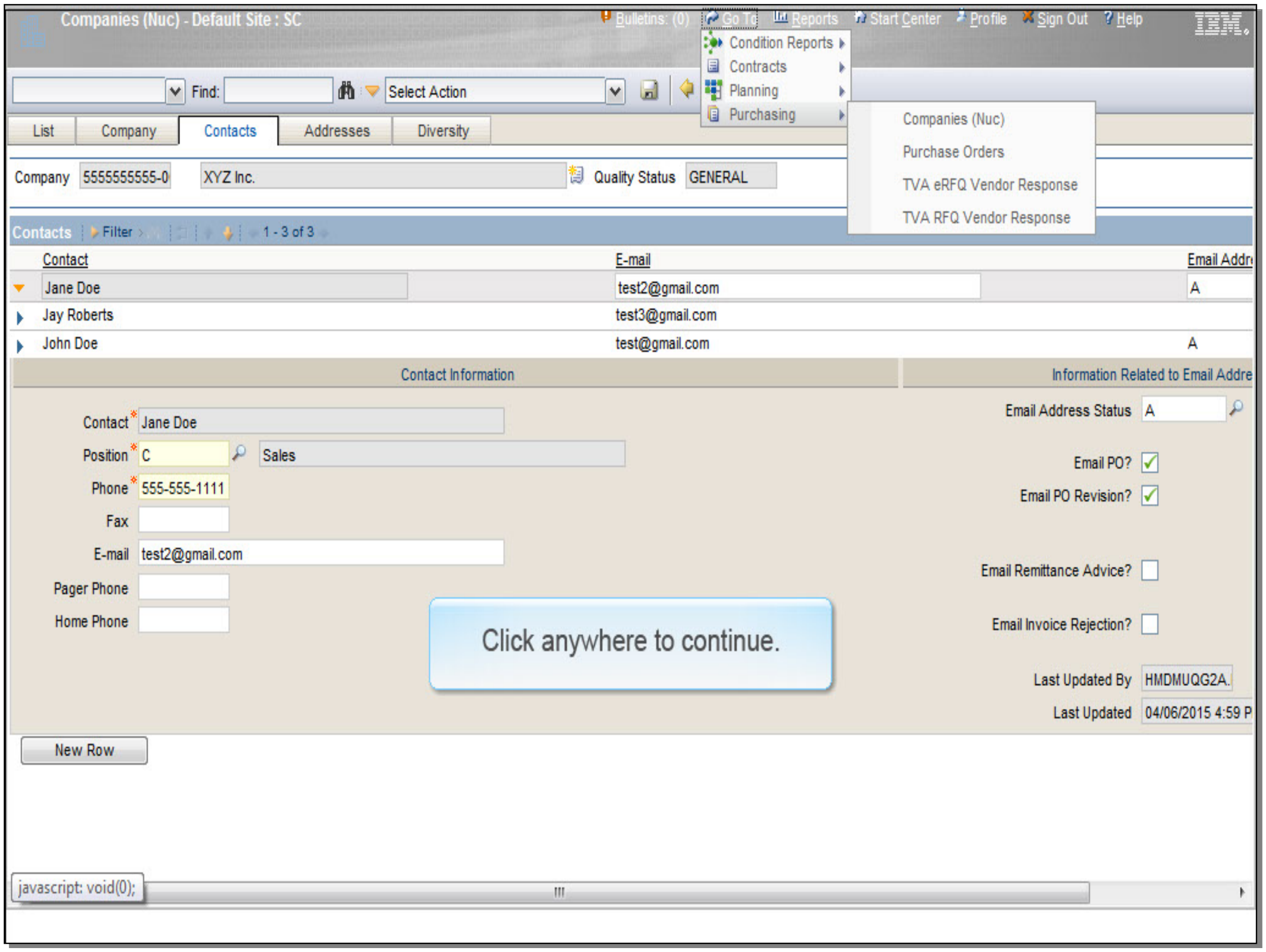
Slide notes

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.

Slide 50 - Summary

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.

Slide 51 - Introduction

Slide notes

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

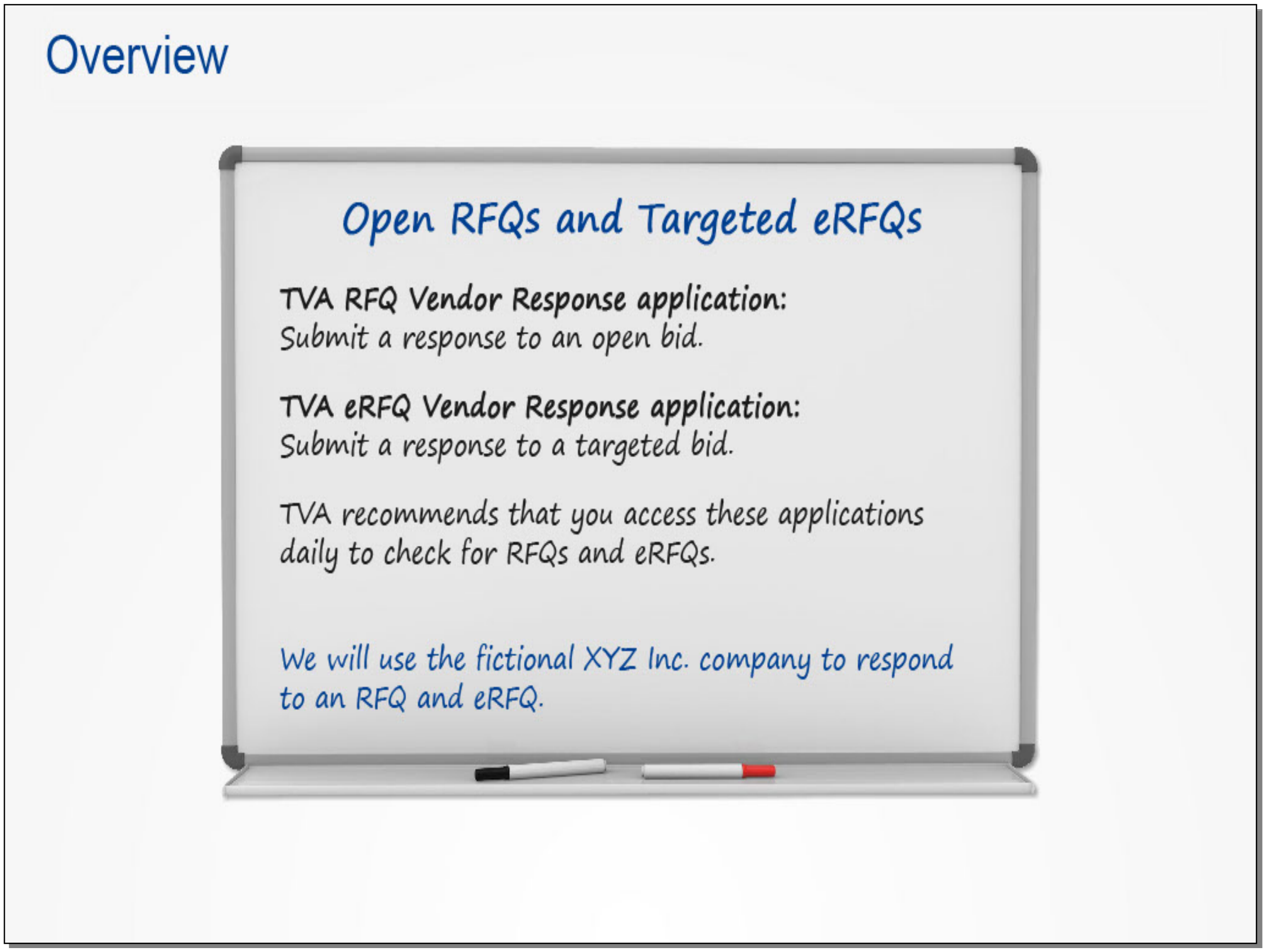
Text Captions

Overview

Submitting an Open RFQ Response

Submitting a Targeted eRFQ Response

Slide 52 - 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.

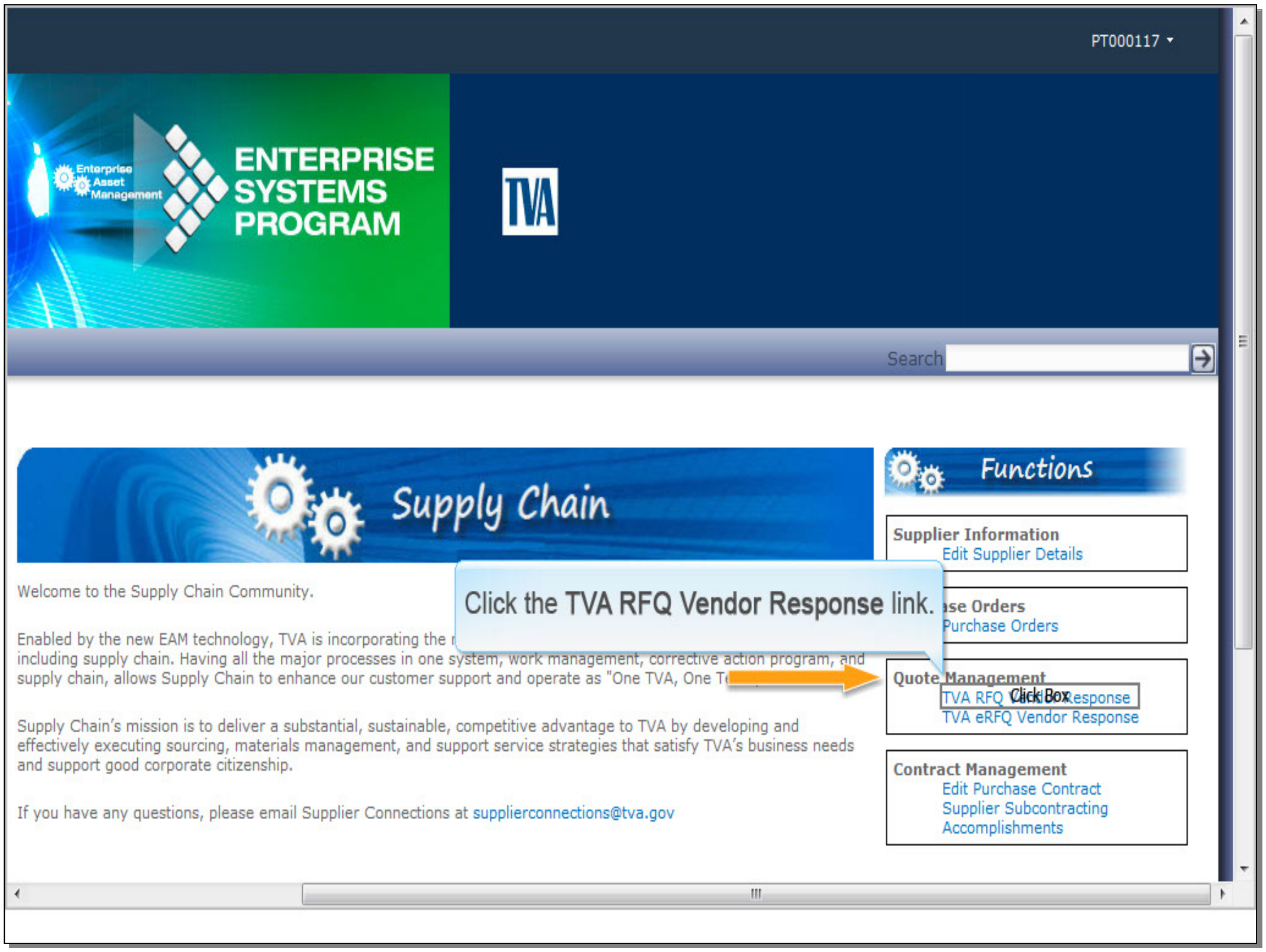
TVA eRFQ Vendor Response application:

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

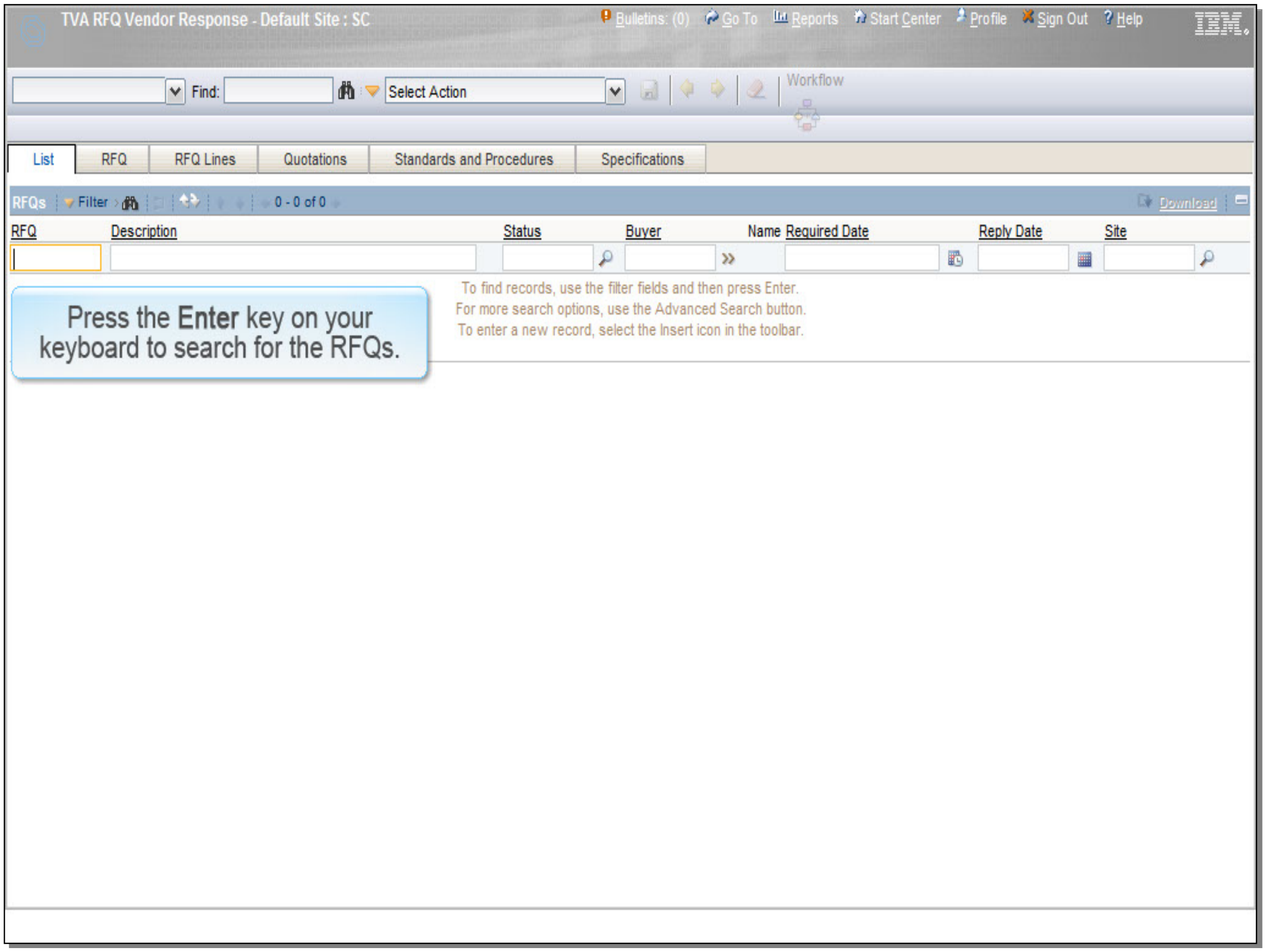
We'll begin from the Supplier portal, where we've scrolled to the right side of the home page. Both applications are located in the Quote Management section.

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

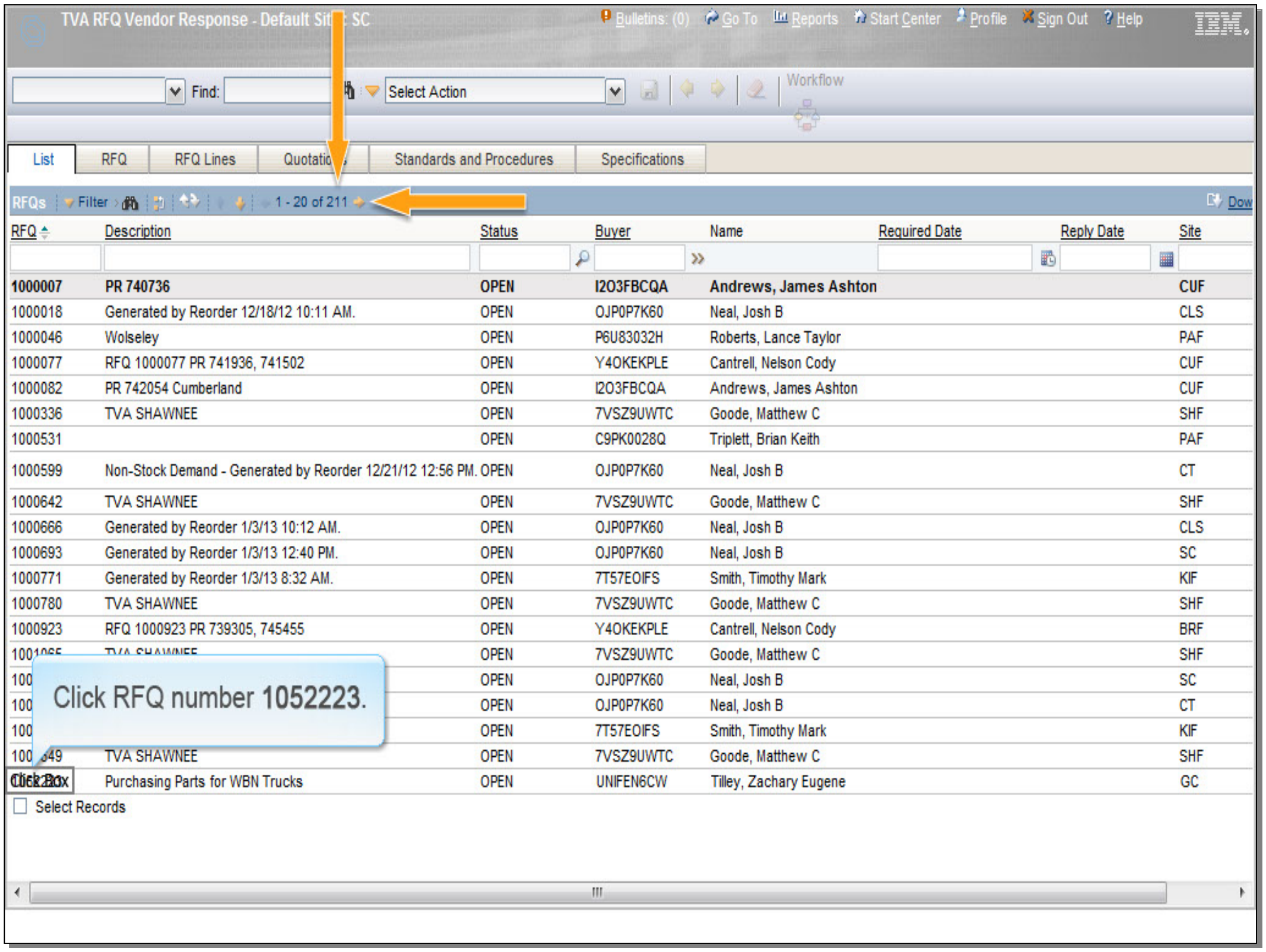
The application is now open with the List tab displayed. This tab is used to search for and retrieve open RFQs for which your company is eligible.

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



Slide notes

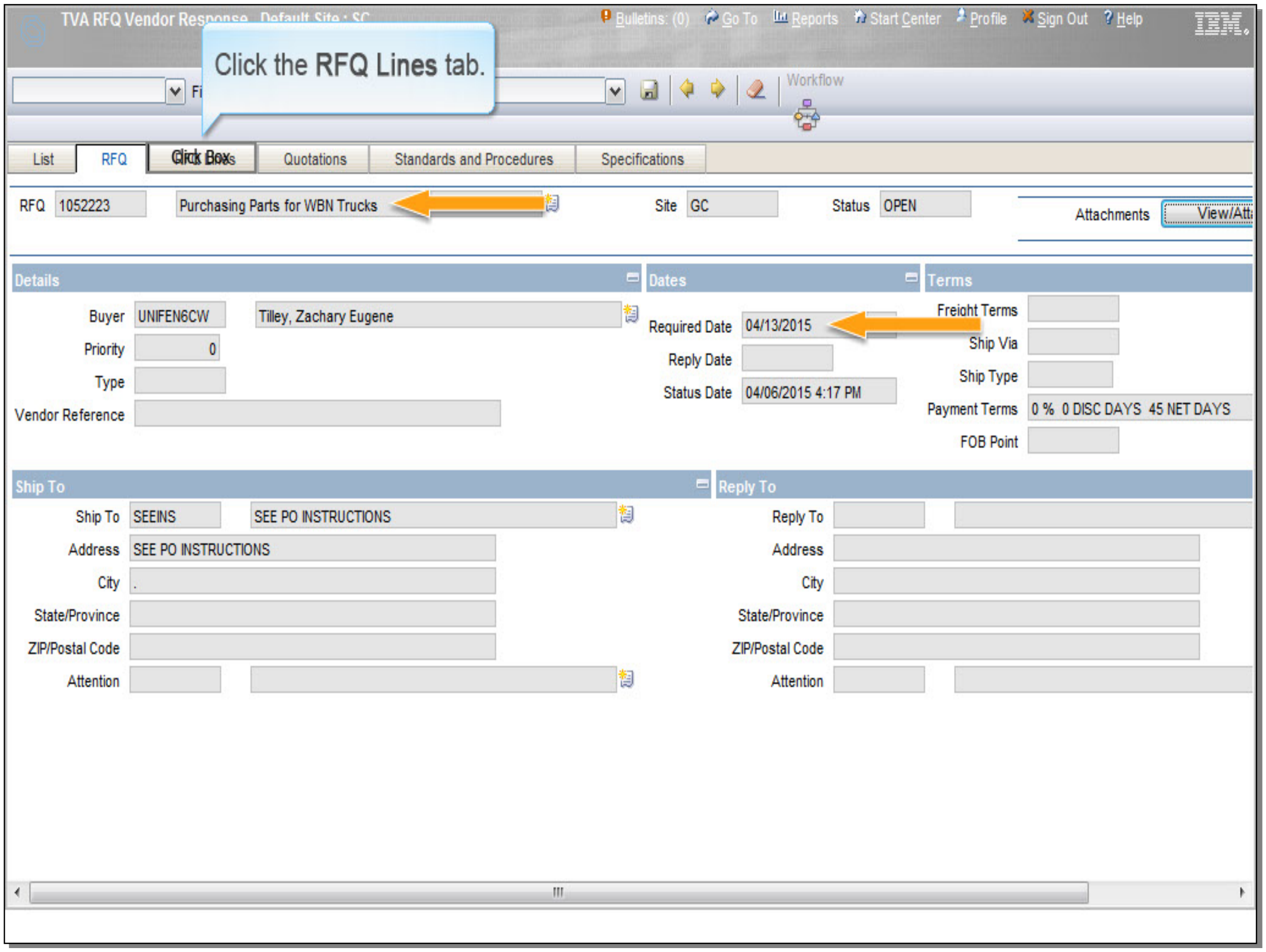
Here you see all of the open RFQs, as indicated in the Status column. The total number is indicated HERE. To view additional pages of RFQs, you can click the Next Page icon.

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



Slide notes

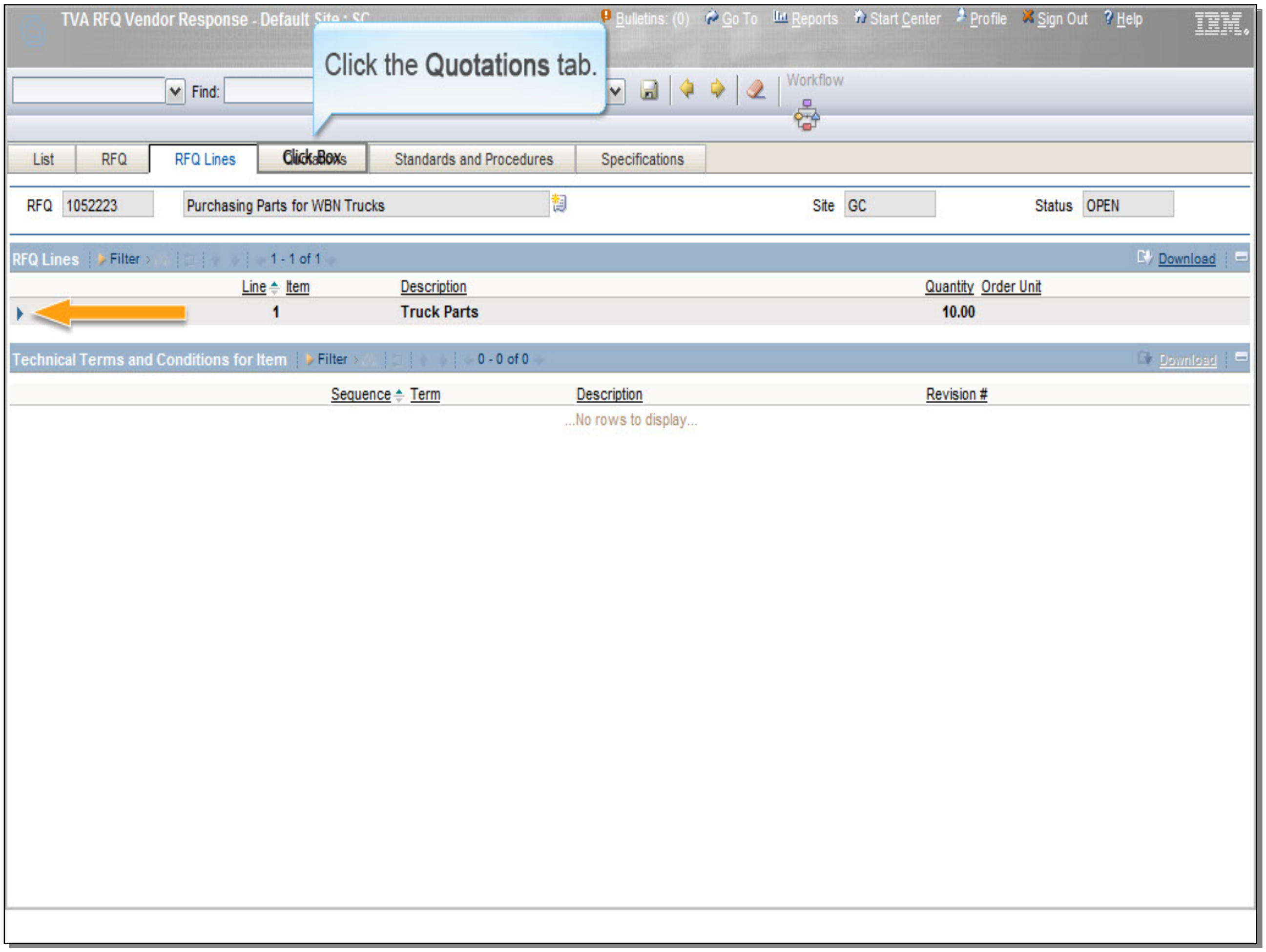
General information about the RFQ is displayed, including a description, HERE. The Required Date field indicates the date that bids are due.

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

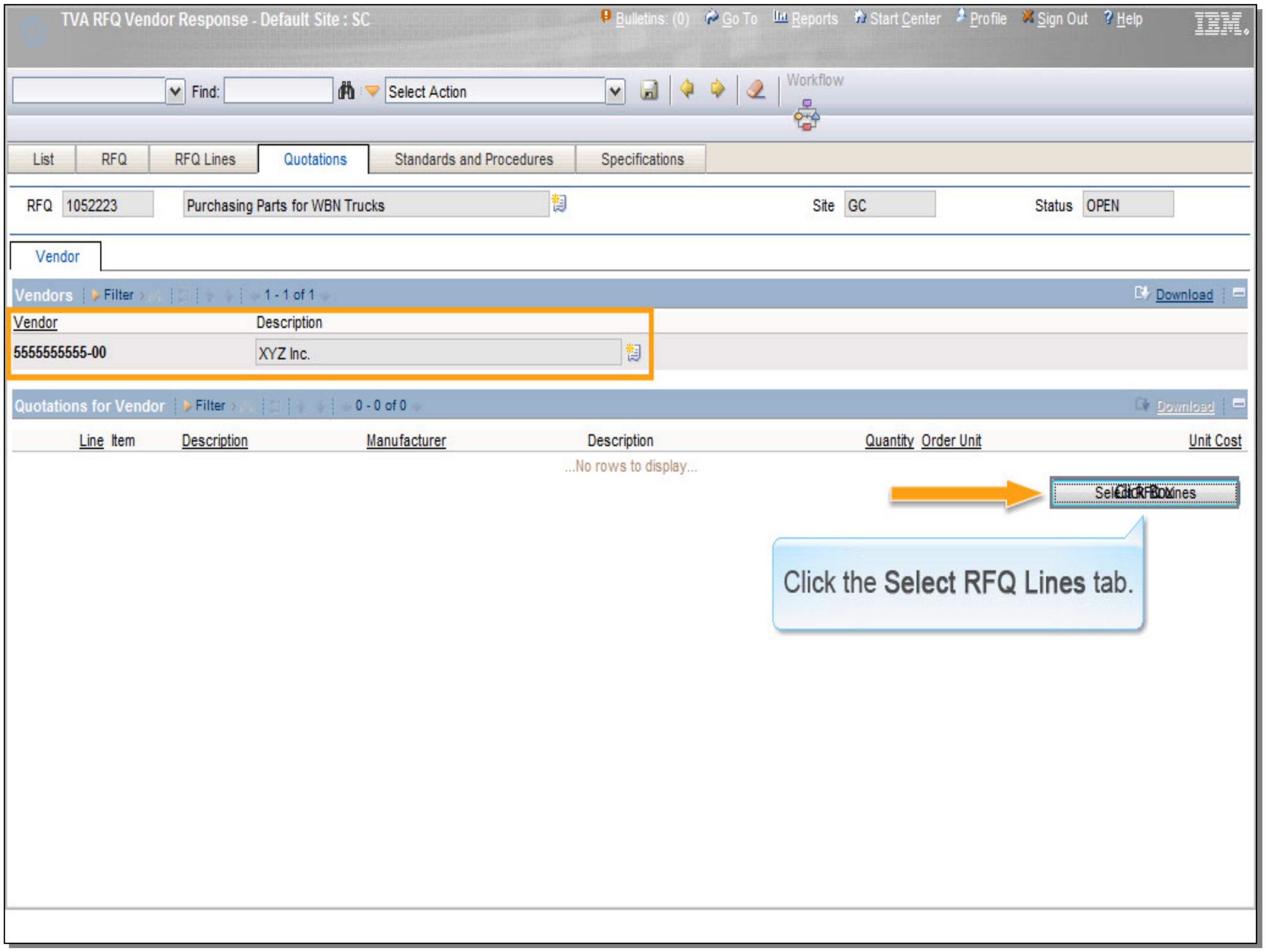
Now you can review the line items requested and decide whether to respond. If you want to view more information about a line, you can click the View Details icon to the left of a line.

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



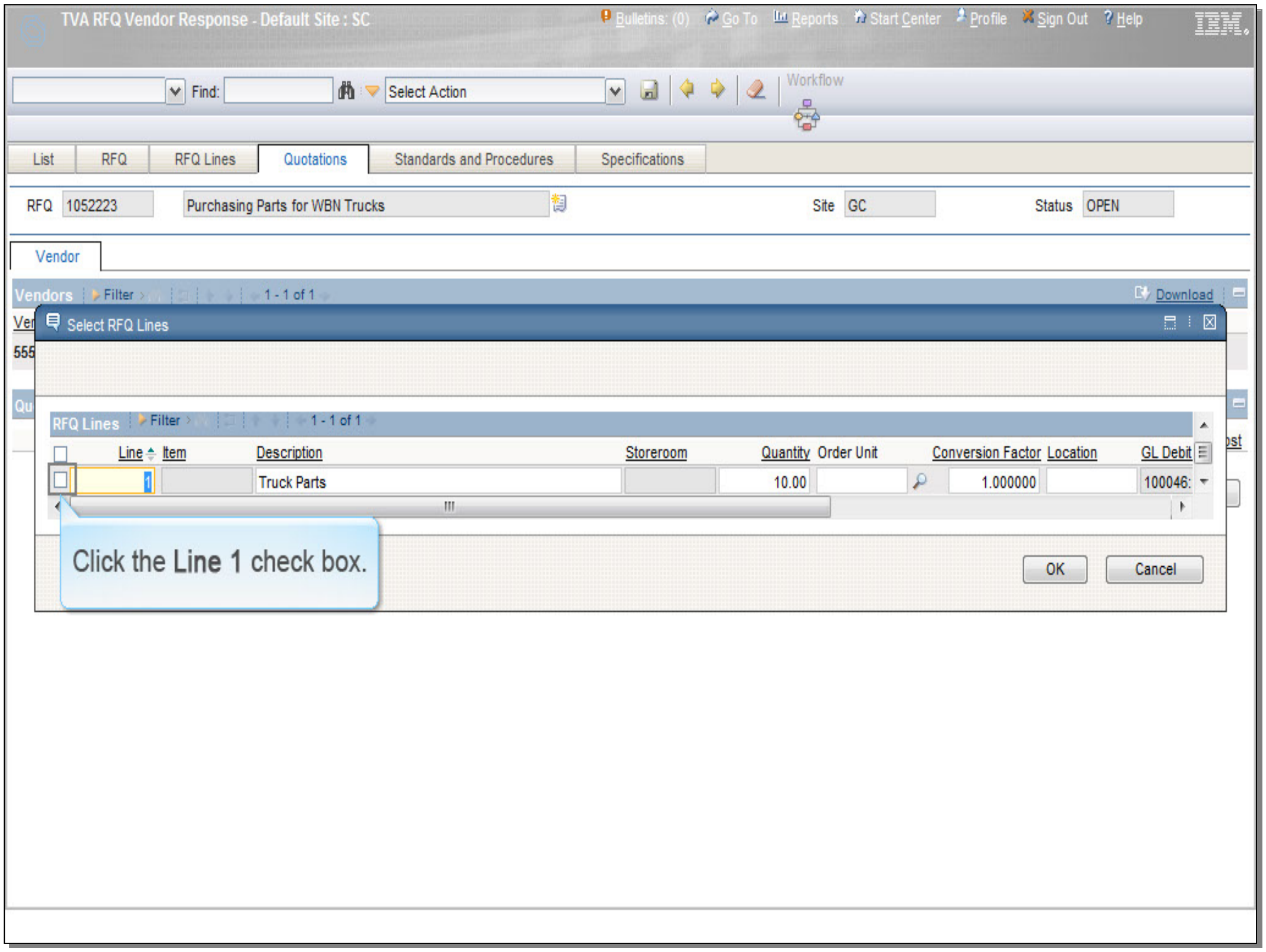
Slide notes

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

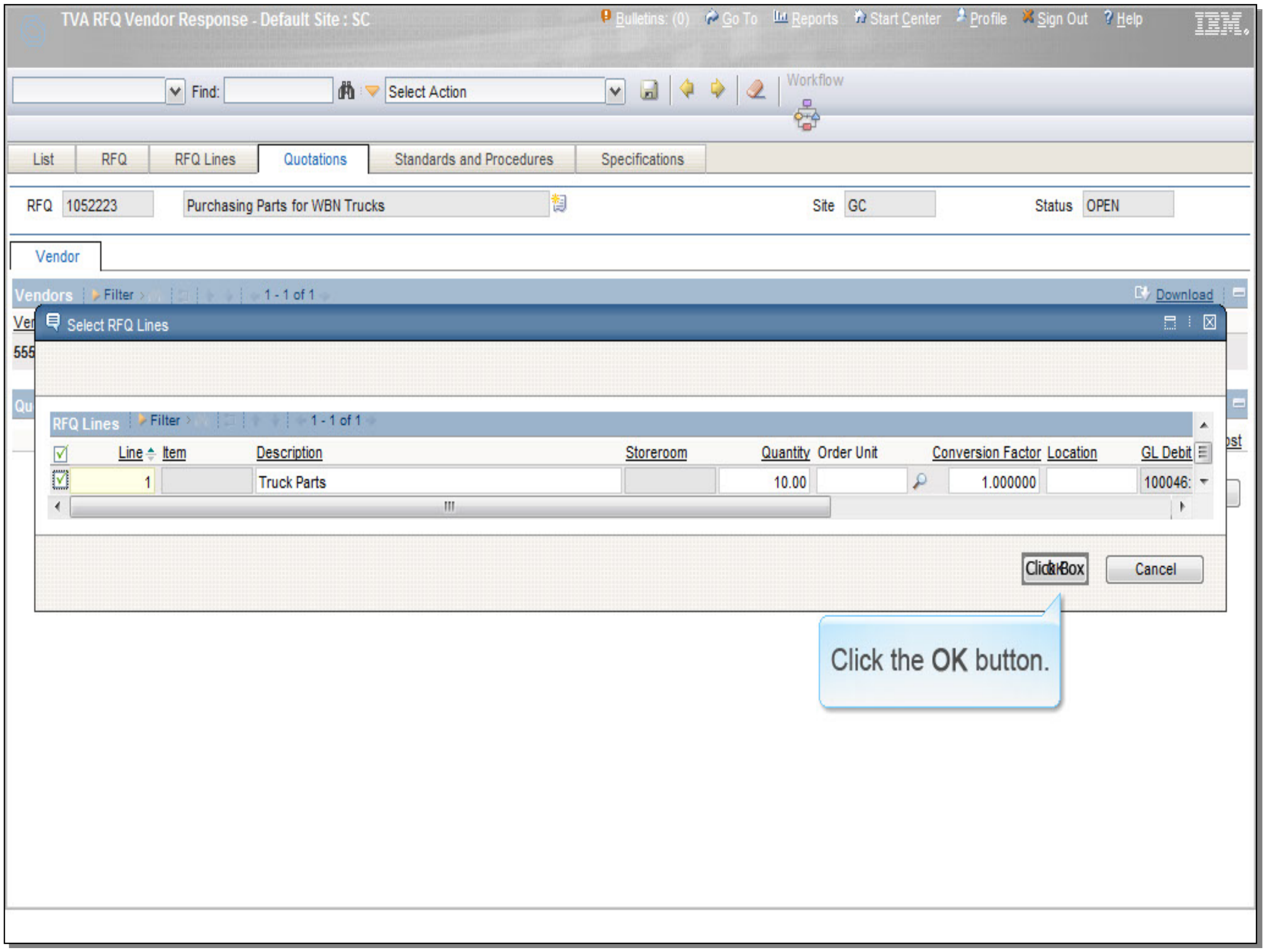


Slide notes

Text Captions

Click the **Line 1** check box.

Slide 60 - Submitting an Open RFQ Response

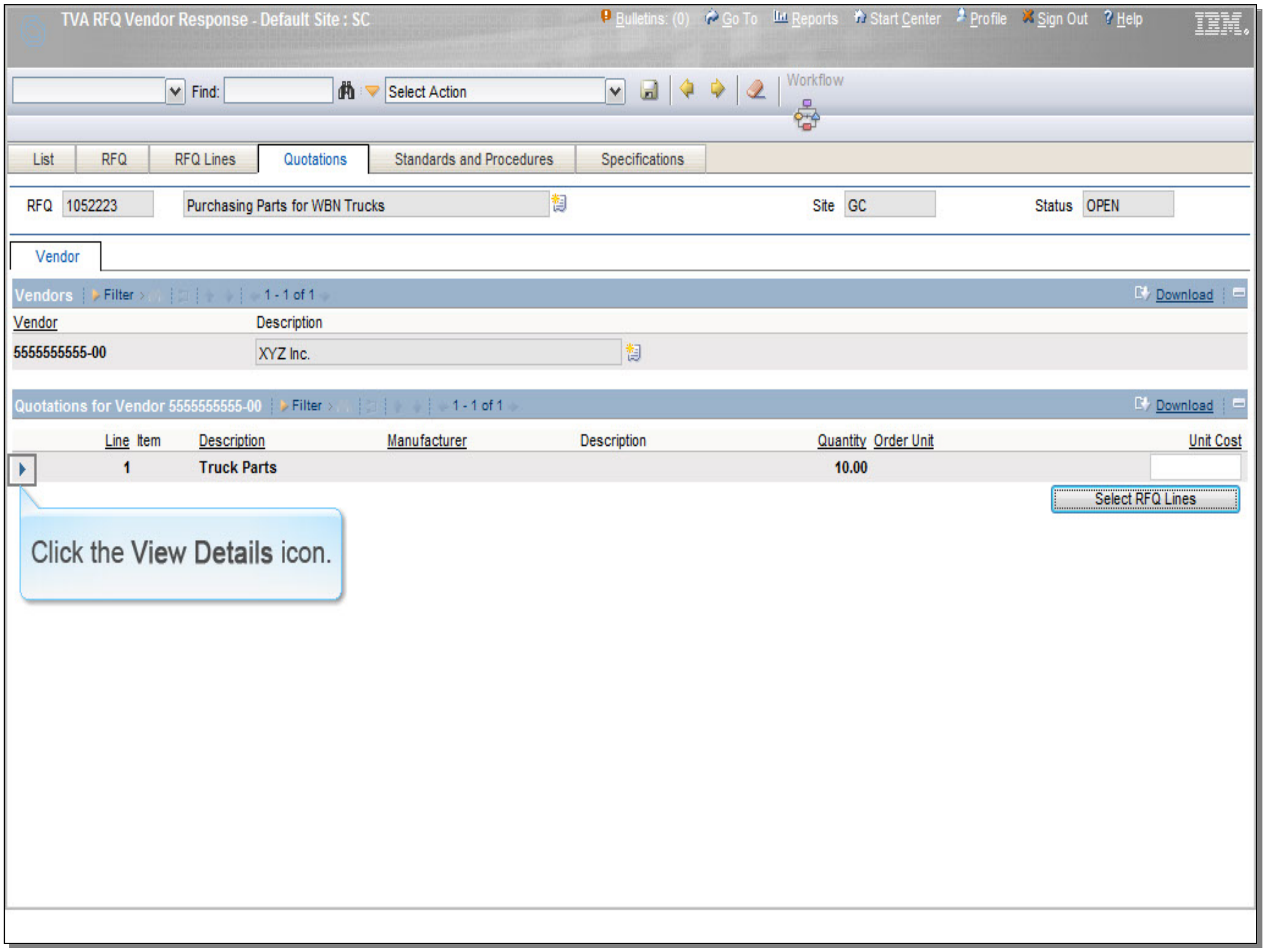


Slide notes

Text Captions

Click the **OK** button.

Slide 61 - Submitting an Open RFQ Response



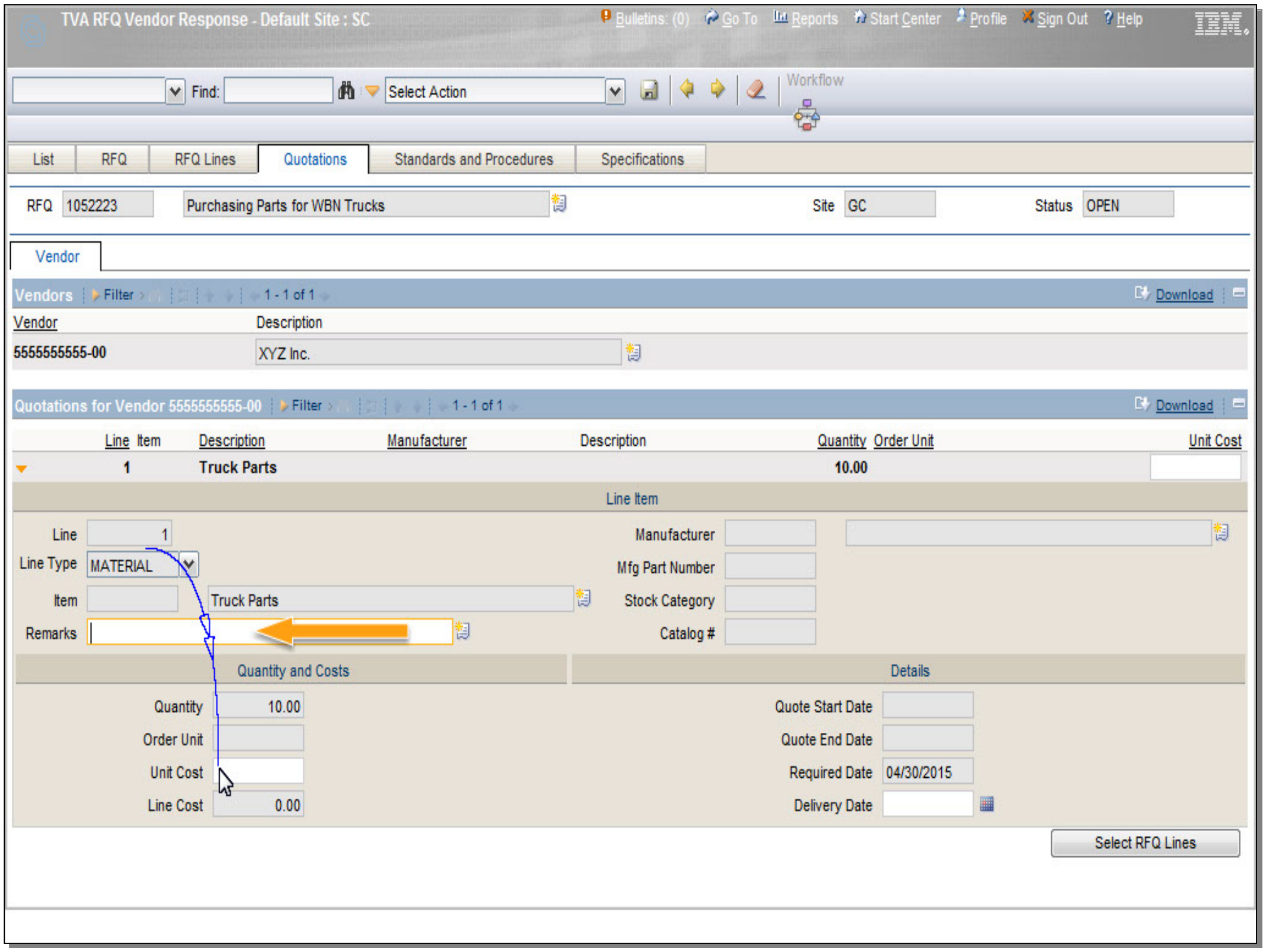
Slide notes

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

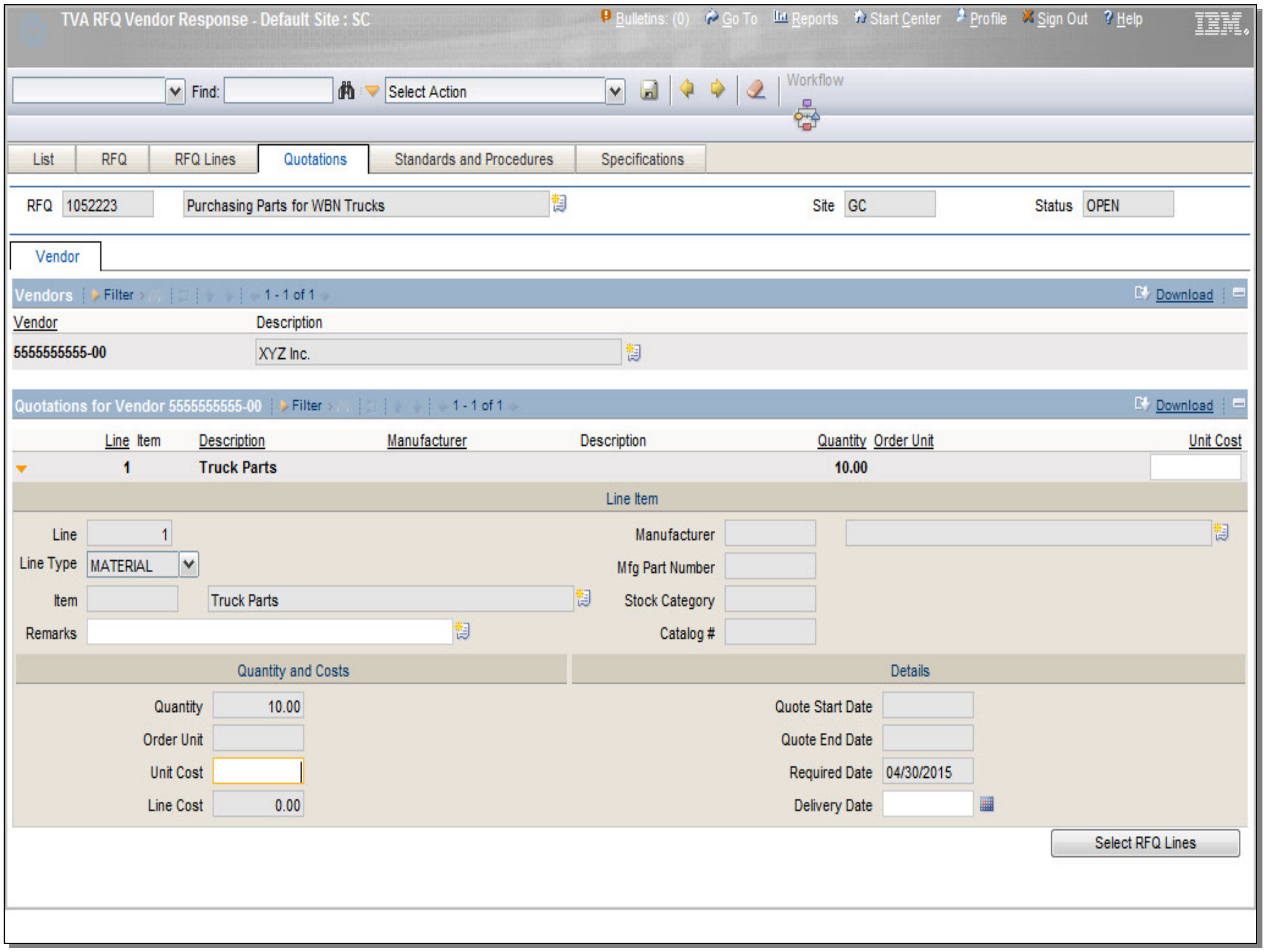


Slide notes

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

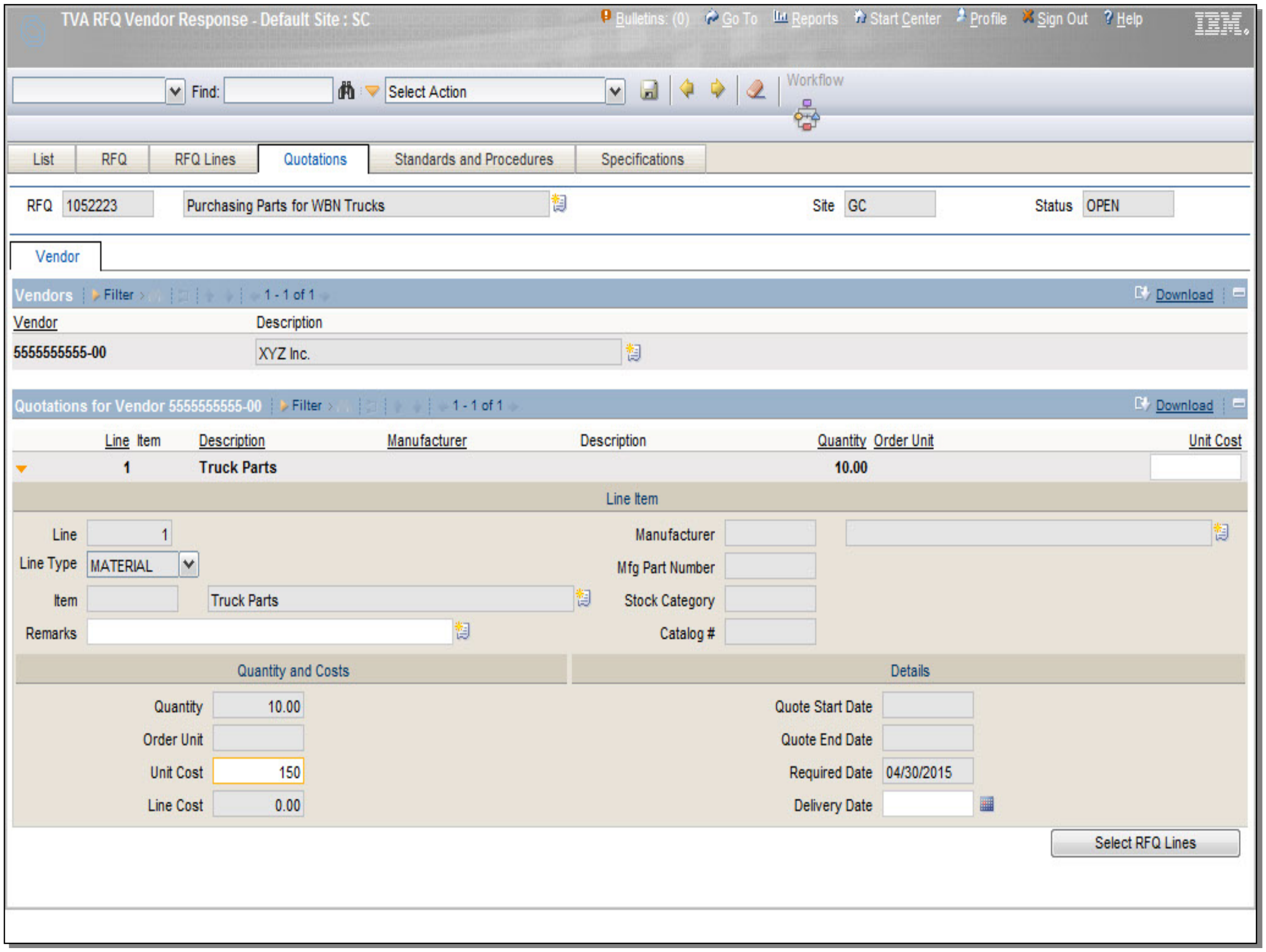
Slide 63 - Submitting an Open RFQ Response



Slide notes

Text Captions

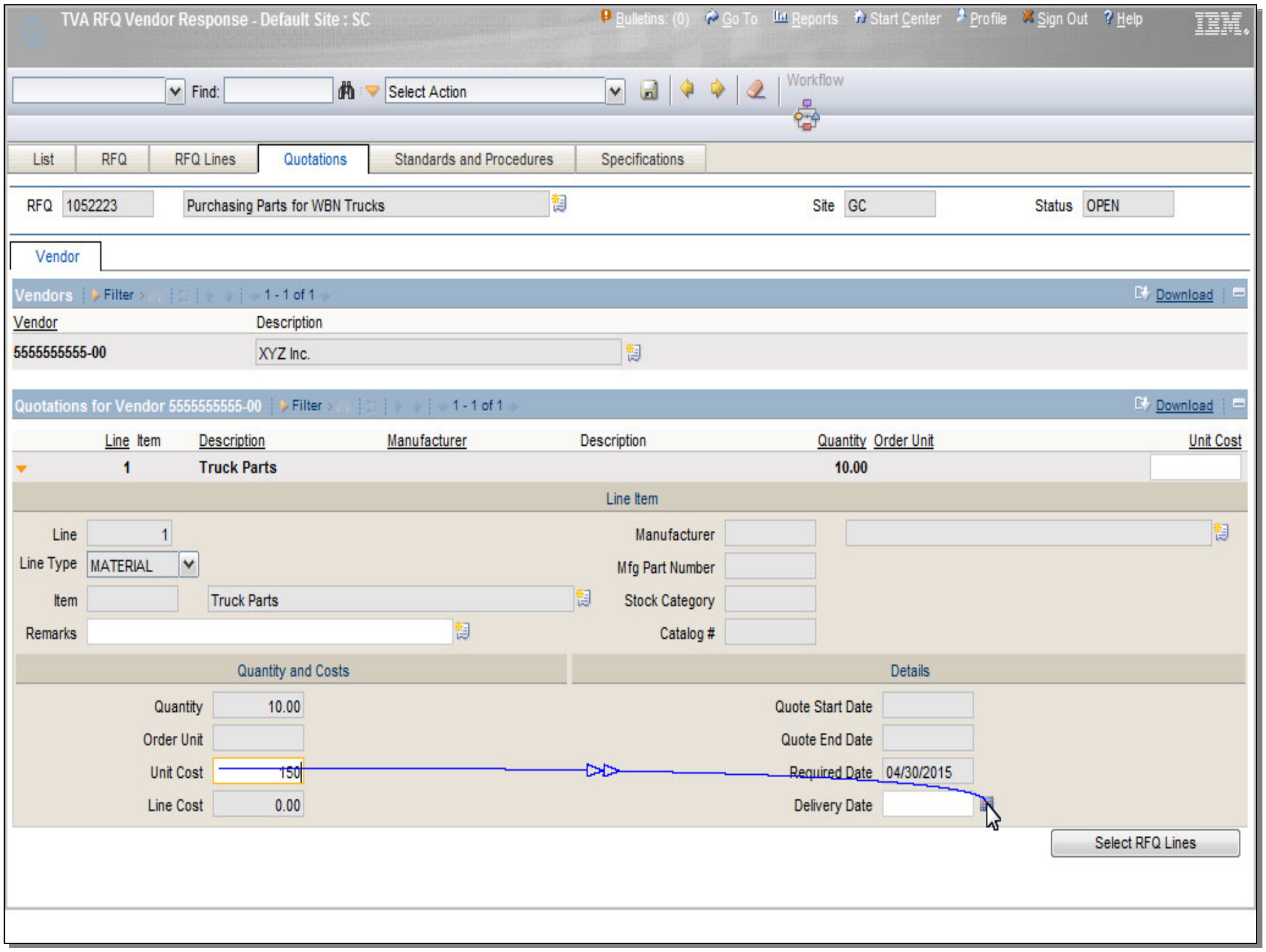
Slide 64 - Submitting an Open RFQ Response



Slide notes

Text Captions

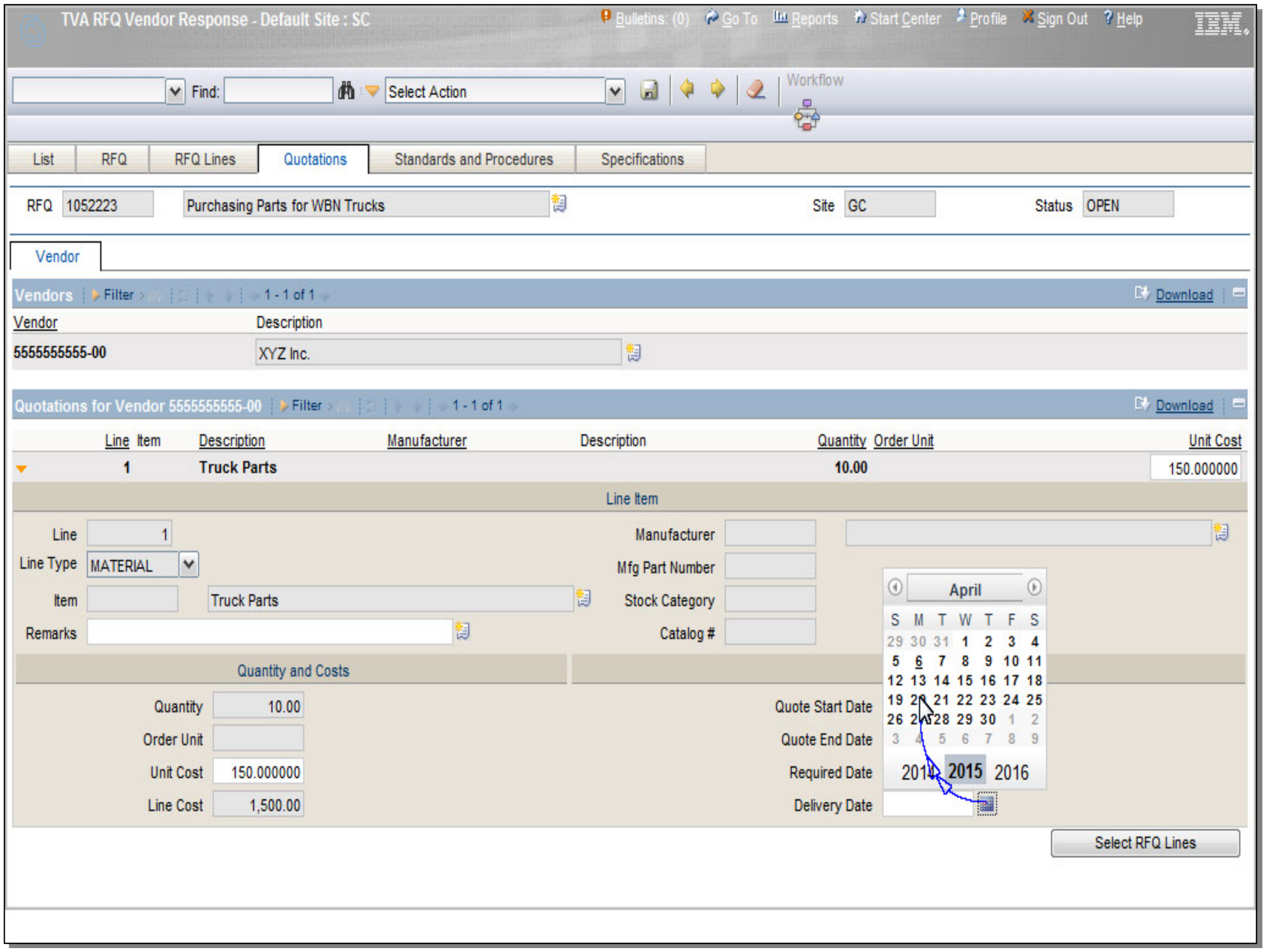
Slide 65 - Submitting an Open RFQ Response



Slide notes

Text Captions

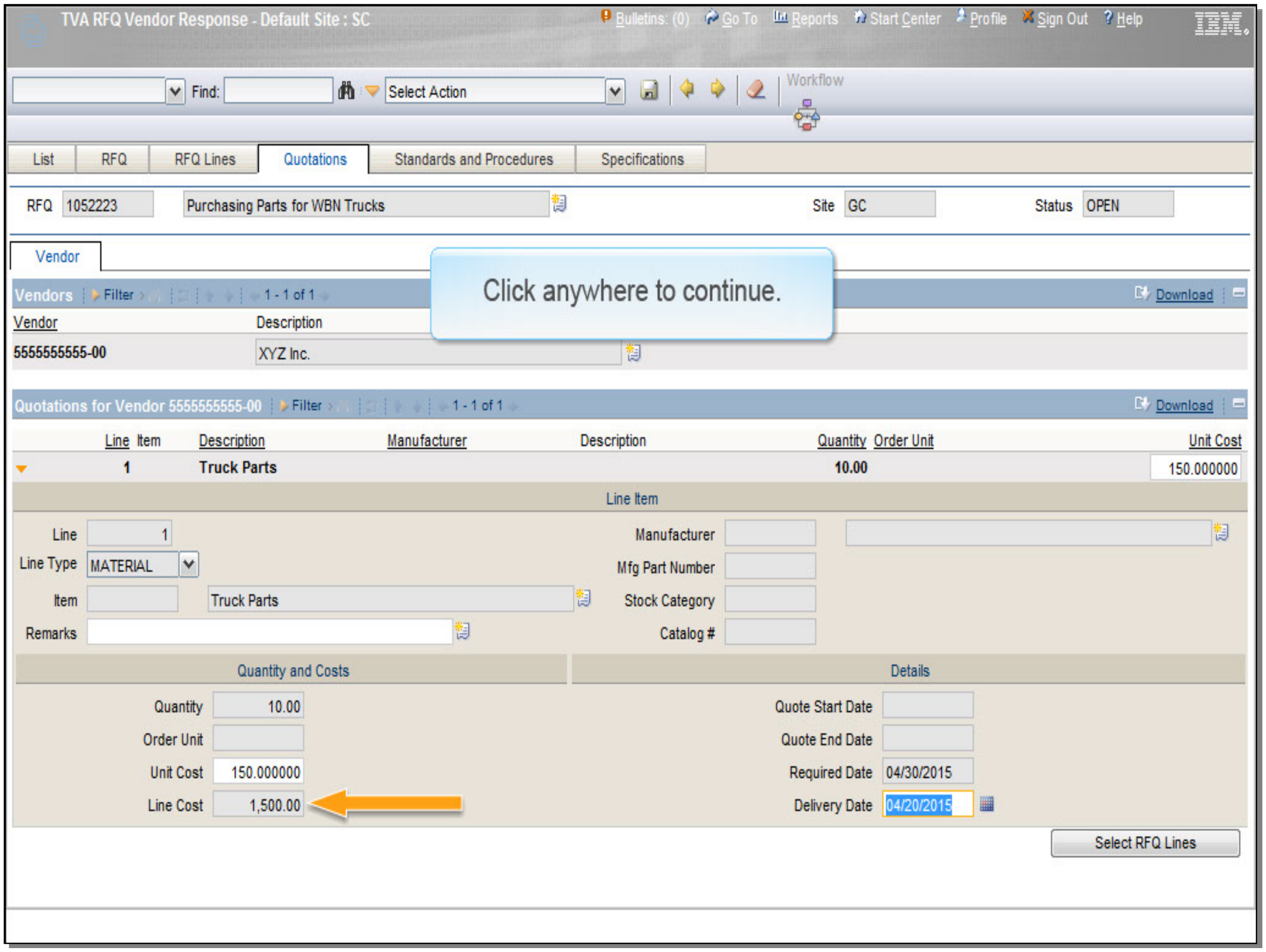
Slide 66 - Submitting an Open RFQ Response



Slide notes

Text Captions

Slide 67 - Submitting an Open RFQ Response



Slide notes

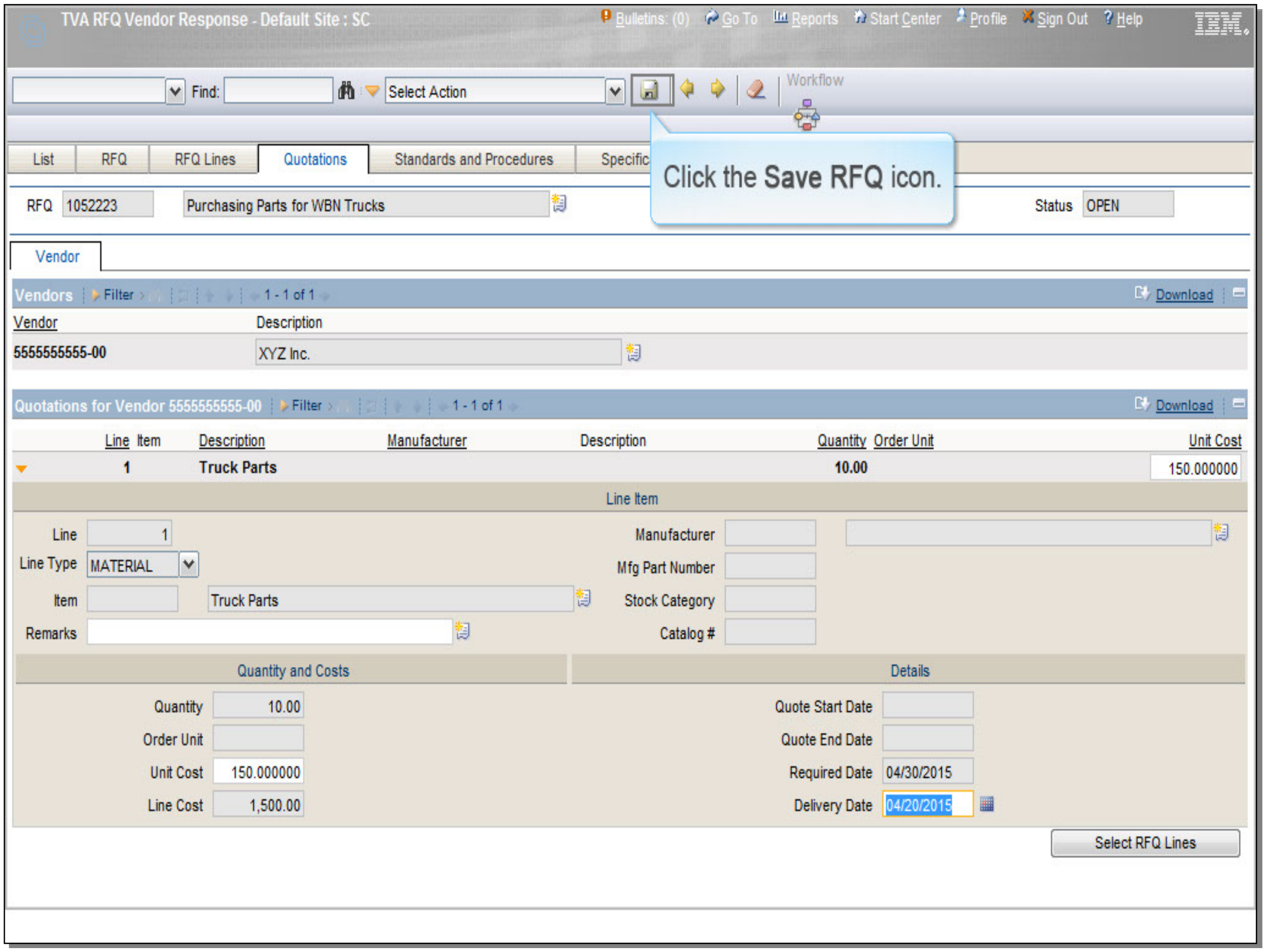
As you can see, Maximo has calculated the Line Cost based on the Unit Cost just entered.

Look over this information and then click anywhere to continue.

Text Captions

Click anywhere to continue.

Slide 68 - Submitting an Open RFQ Response



Slide notes

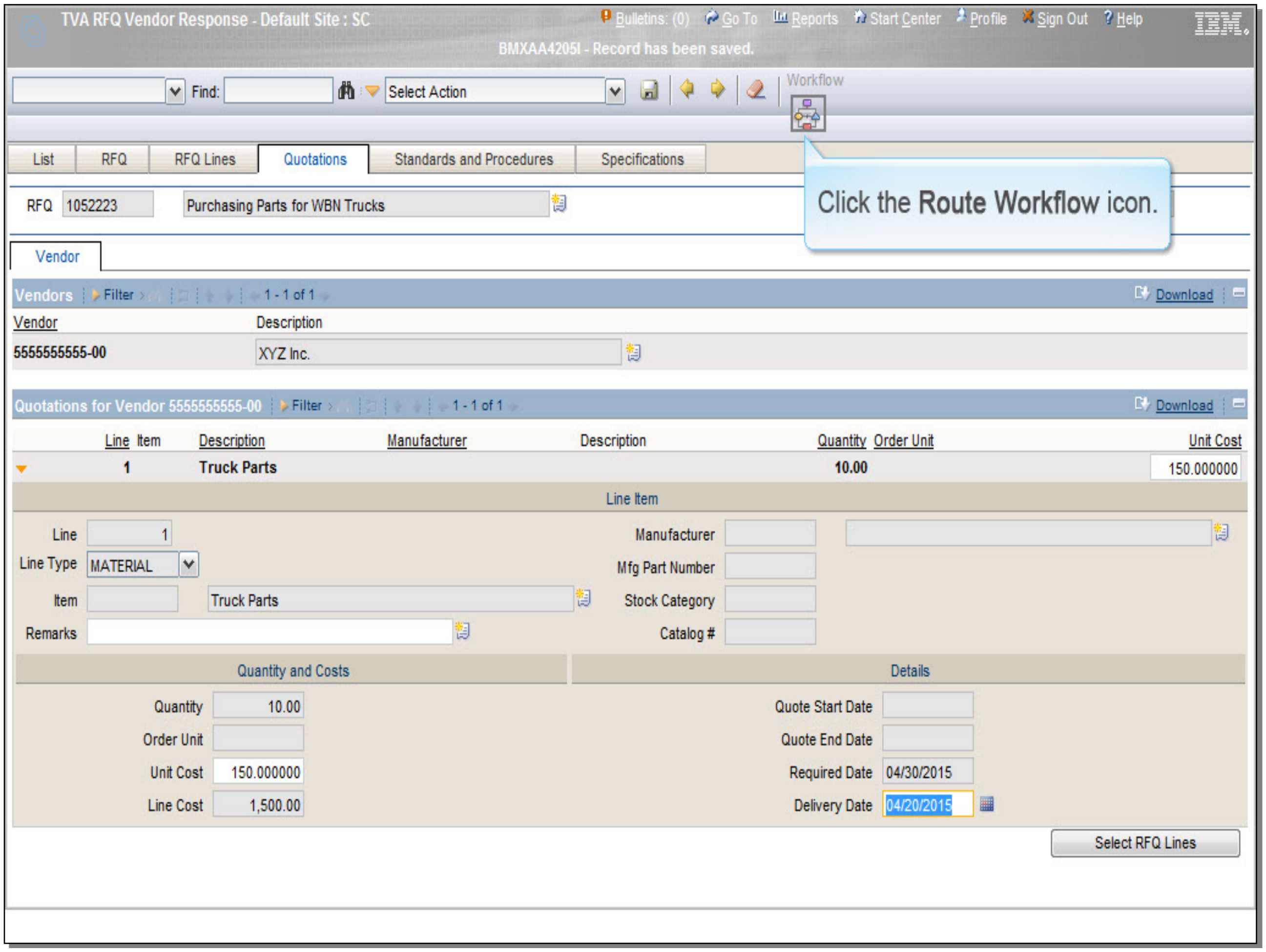
If you were responding to multiple lines, you would repeat this process for the other lines. In this example, there is just one line in the RFQ.

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

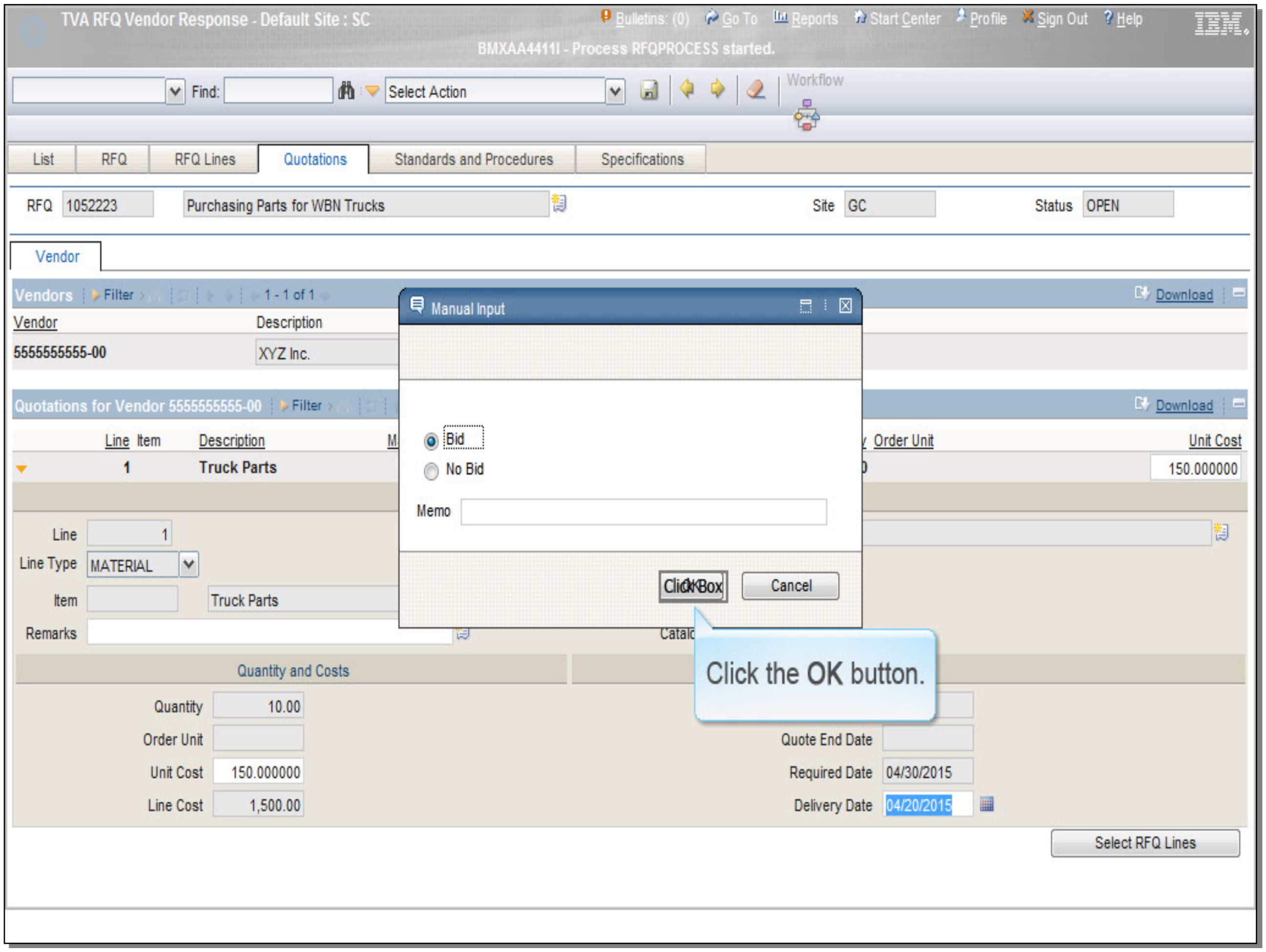


Slide notes

Text Captions

Click the **Route Workflow** icon.

Slide 70 - Submitting an Open RFQ Response



Slide notes

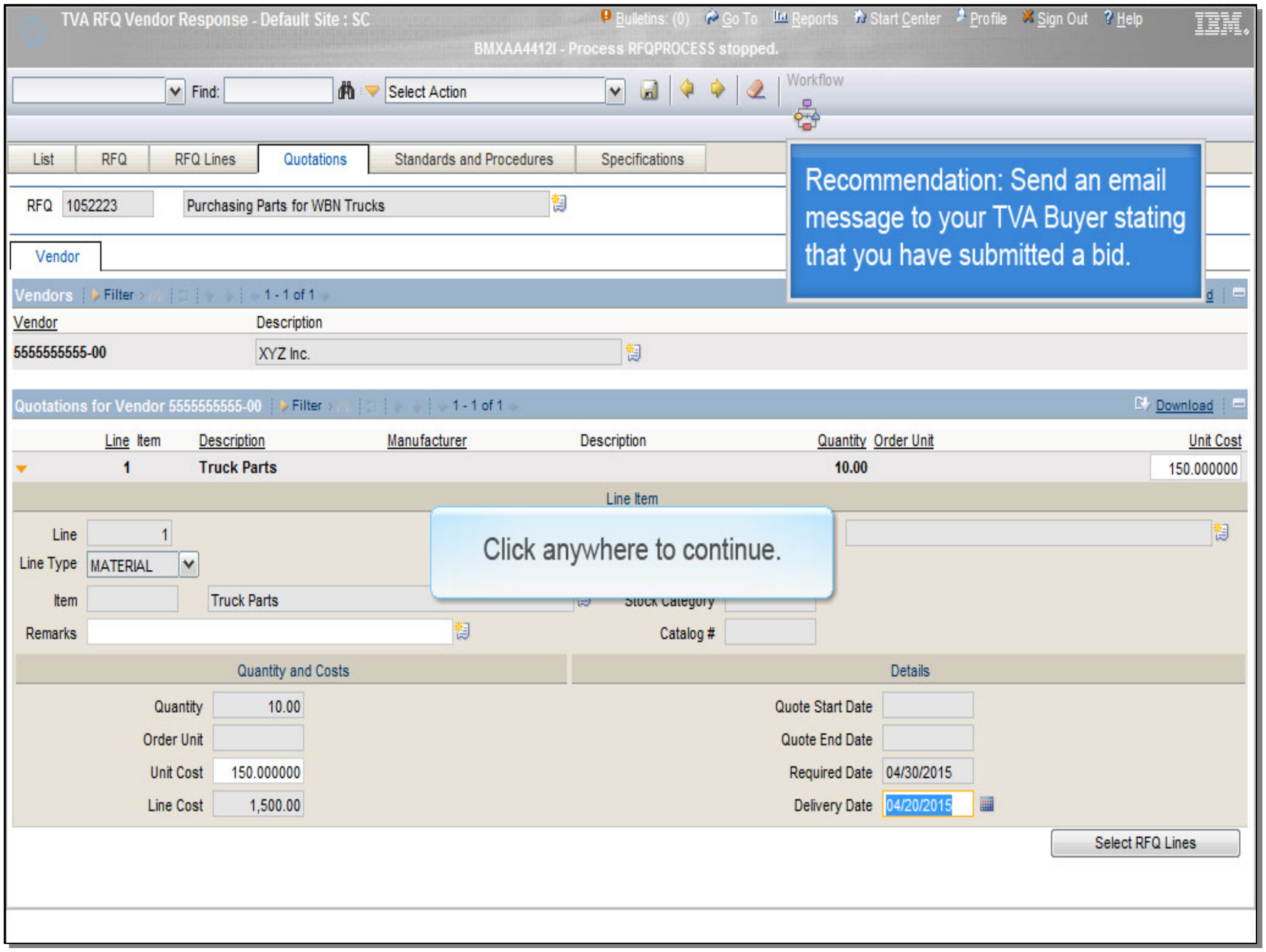
Maximo is prompting you to confirm that you want to submit the bid. If you want to submit a No Bid, it’s a good practice to include an explanation in the Memo field.

Go ahead and click OK to confirm the bid.

Text Captions

Click the **OK** button.

Slide 71 - Submitting an Open RFQ Response



Slide notes

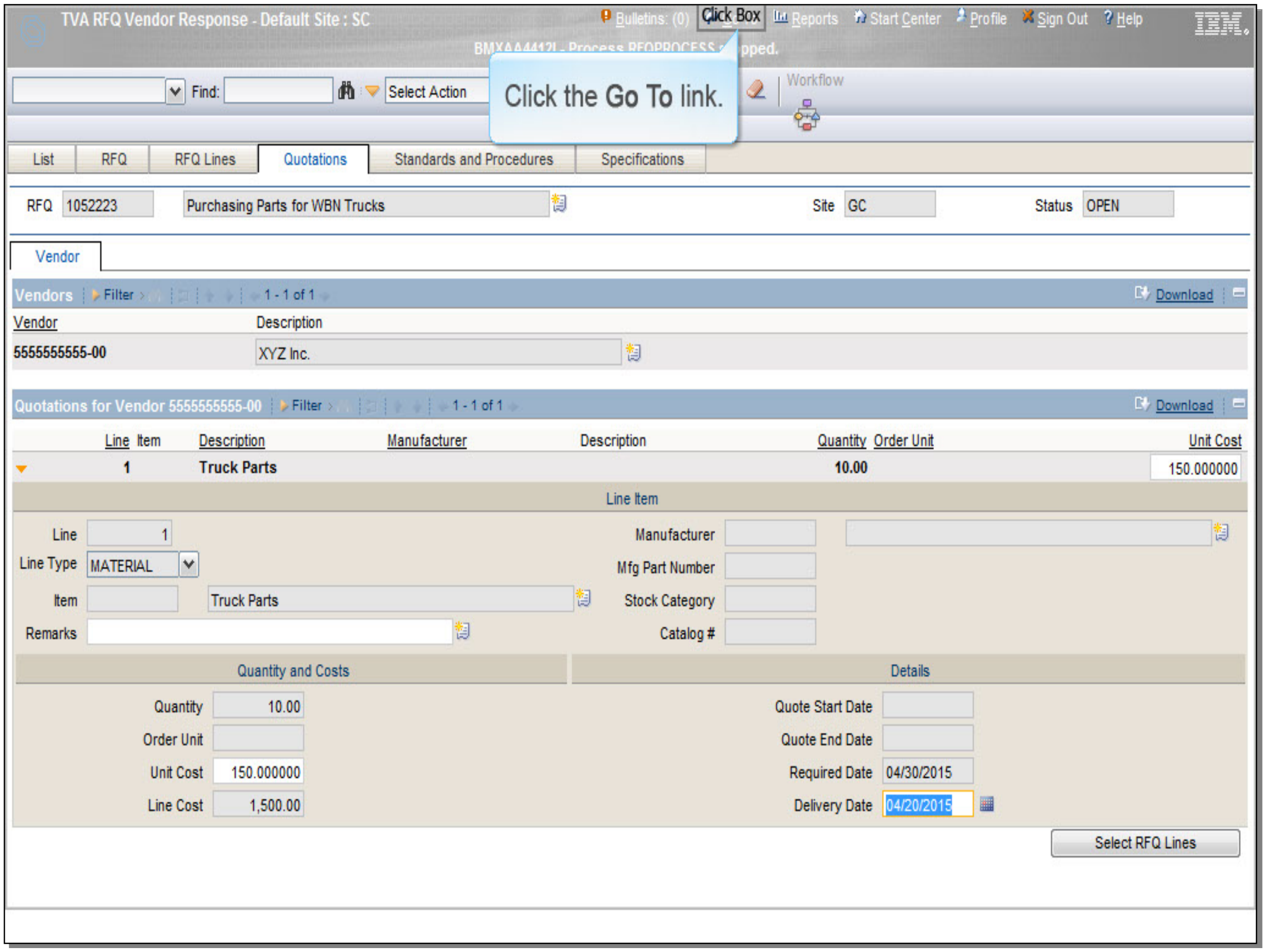
The bid has been routed to the Buyer, where it will be reviewed.

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



Slide notes

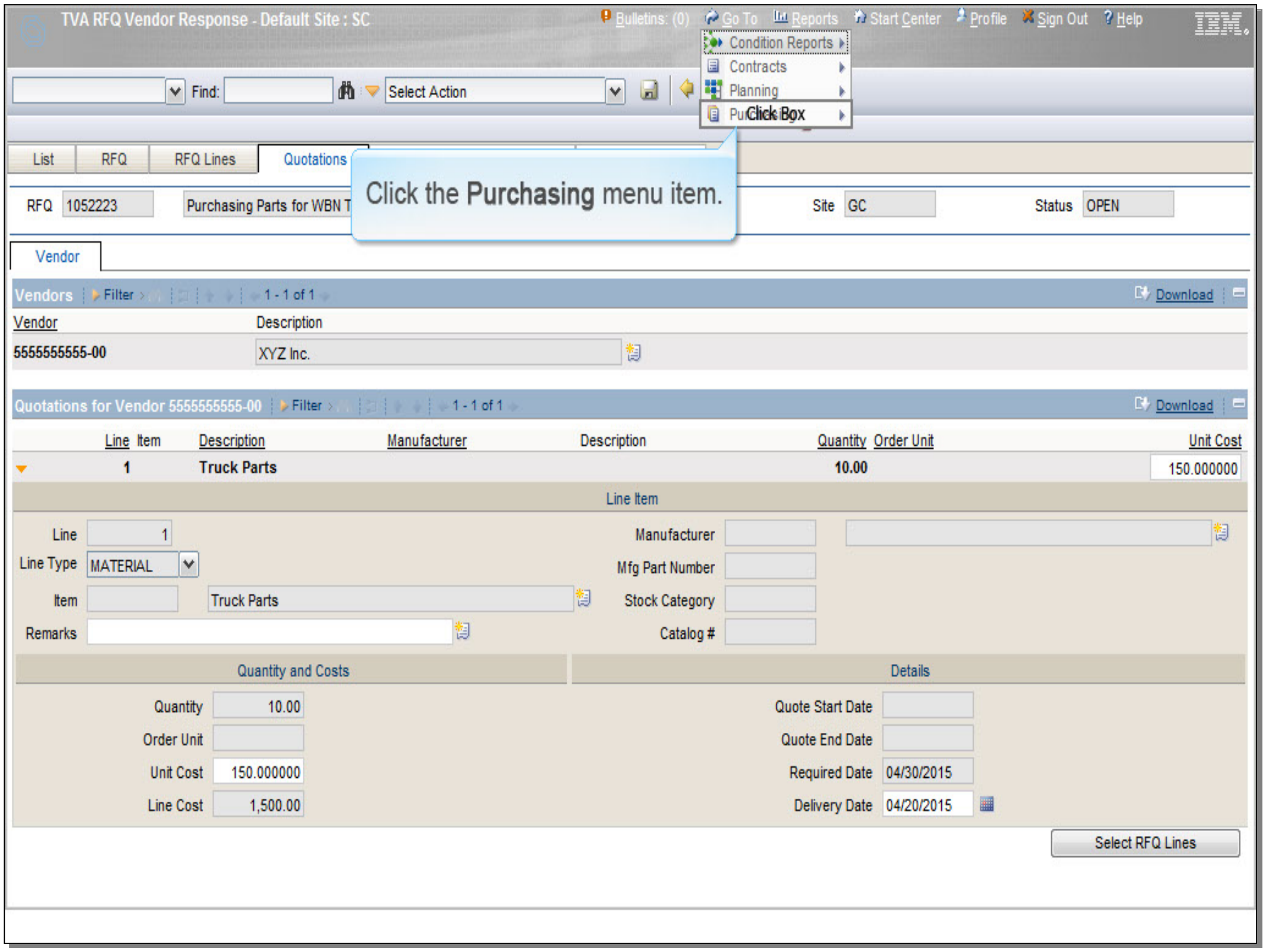
Now let's take a quick look at the process for submitting a targeted eRFQ. In this example, the company already has the contract for the eRFQ.

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

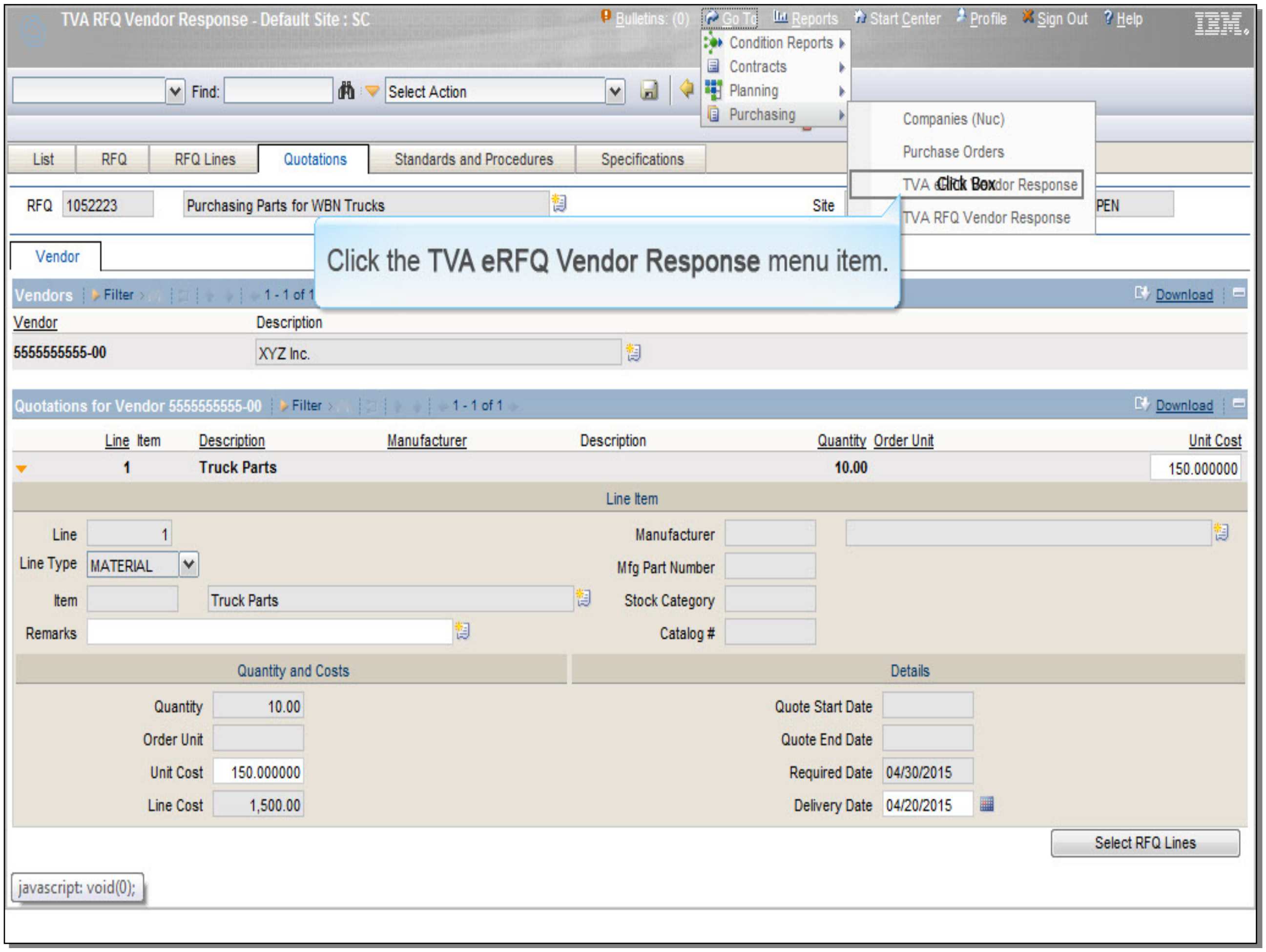


Slide notes

Text Captions

Click the **Purchasing** menu item.

Slide 74 - Submitting a Targeted eRFQ Response

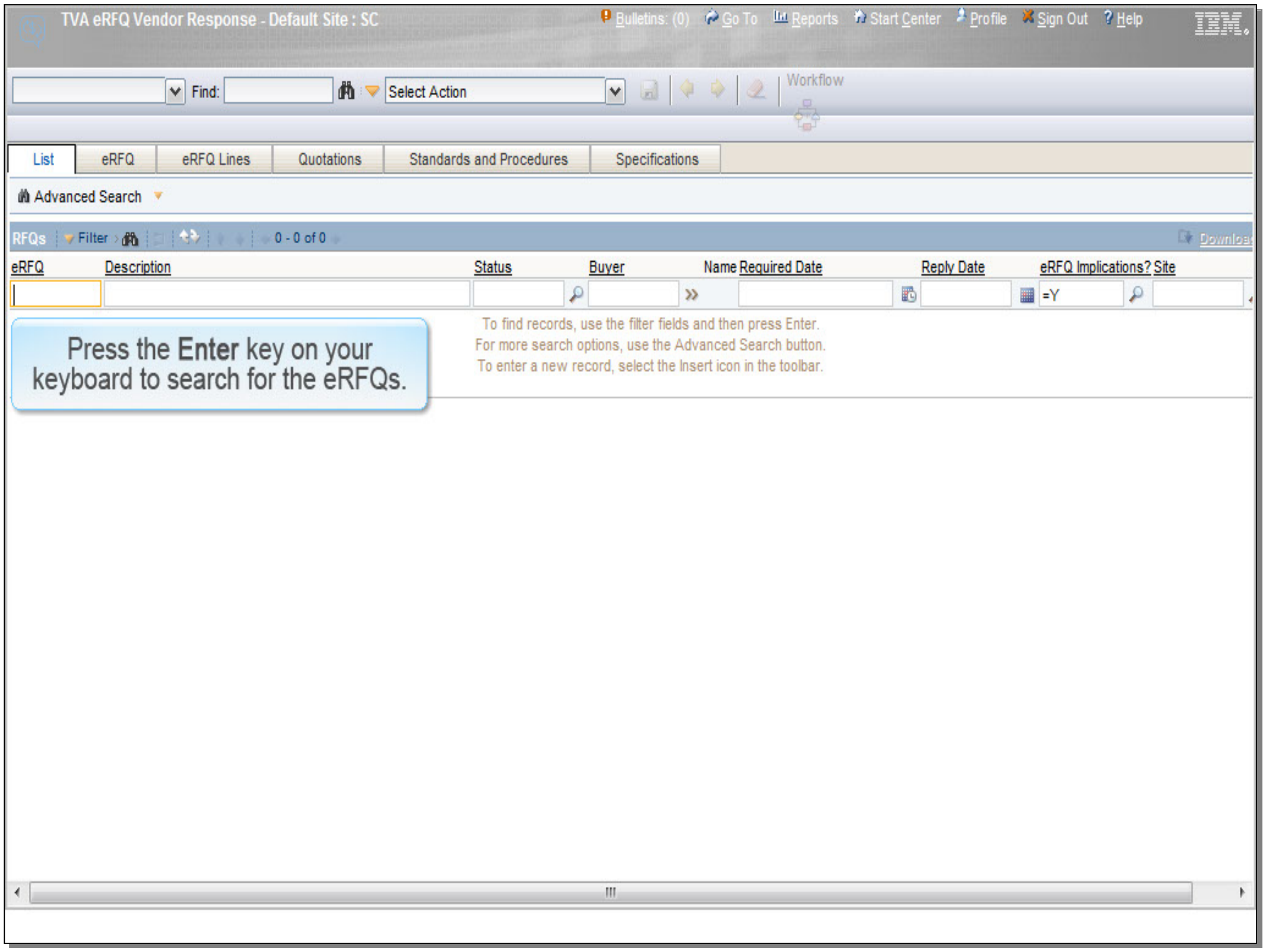


Slide notes

Text Captions

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

Slide 75 - Submitting a Targeted eRFQ Response



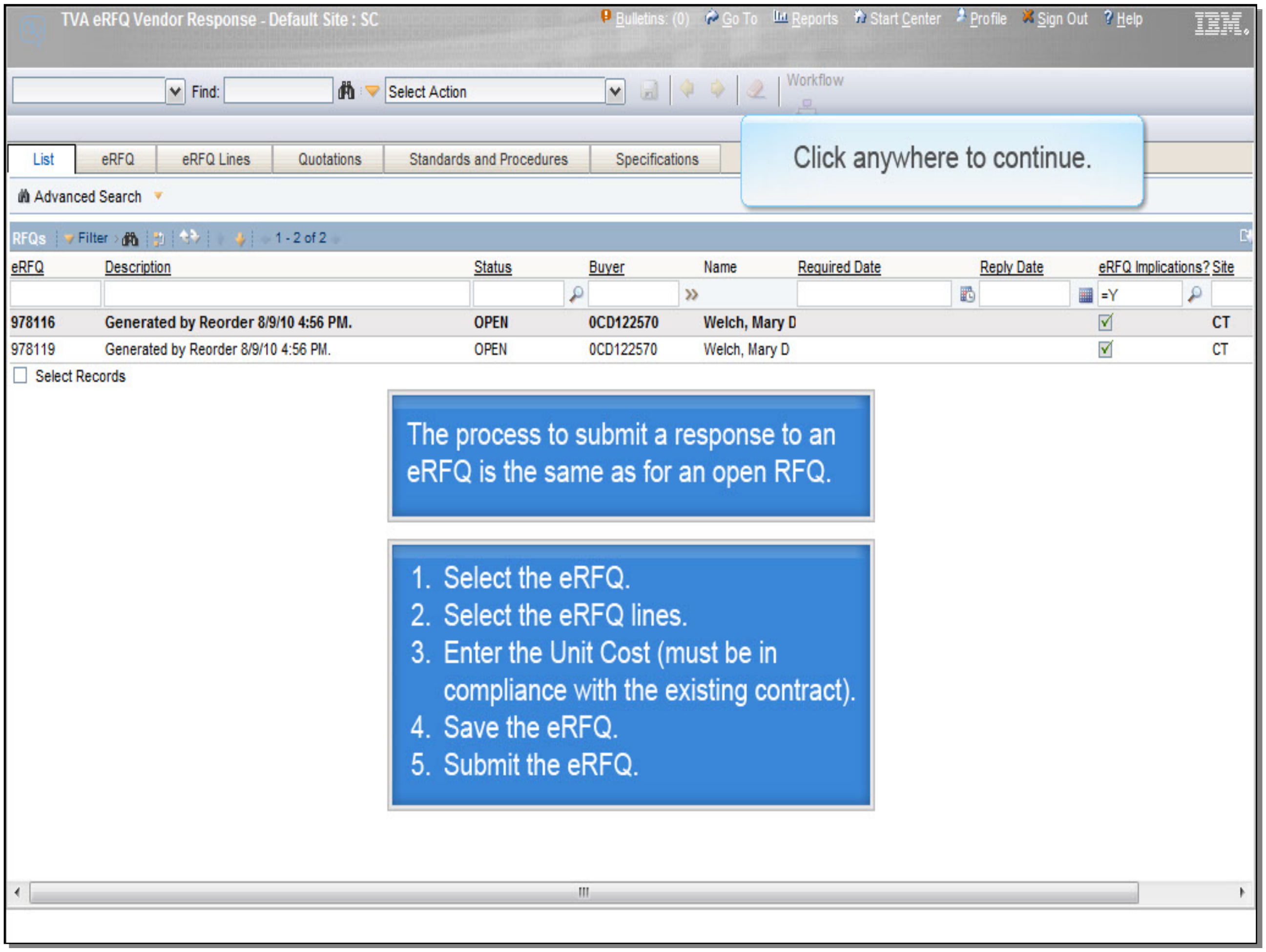
Slide notes

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



Slide notes

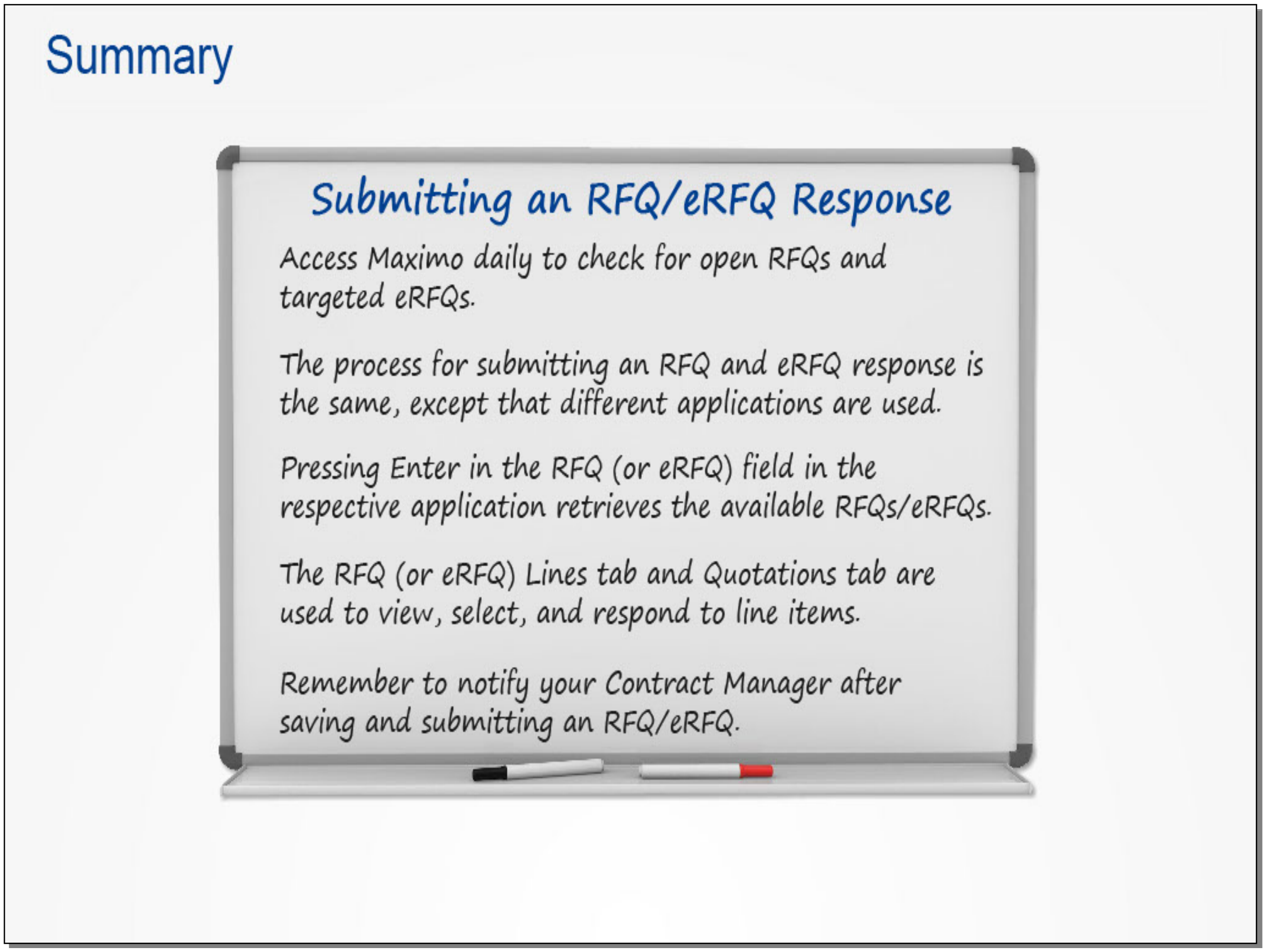
From here, the process to submit a response to an eRFQ is the same as for an open RFQ. You select the eRFQ, select the lines, and enter the Unit Cost. Keep in mind that the Unit Cost must be in compliance with the existing contract.

The last steps are to save and submit the eRFQ.

Text Captions

Click anywhere to continue.

Slide 77 - Summary



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.

Slide 78 - Introduction

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

Slide 79 - Overview

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

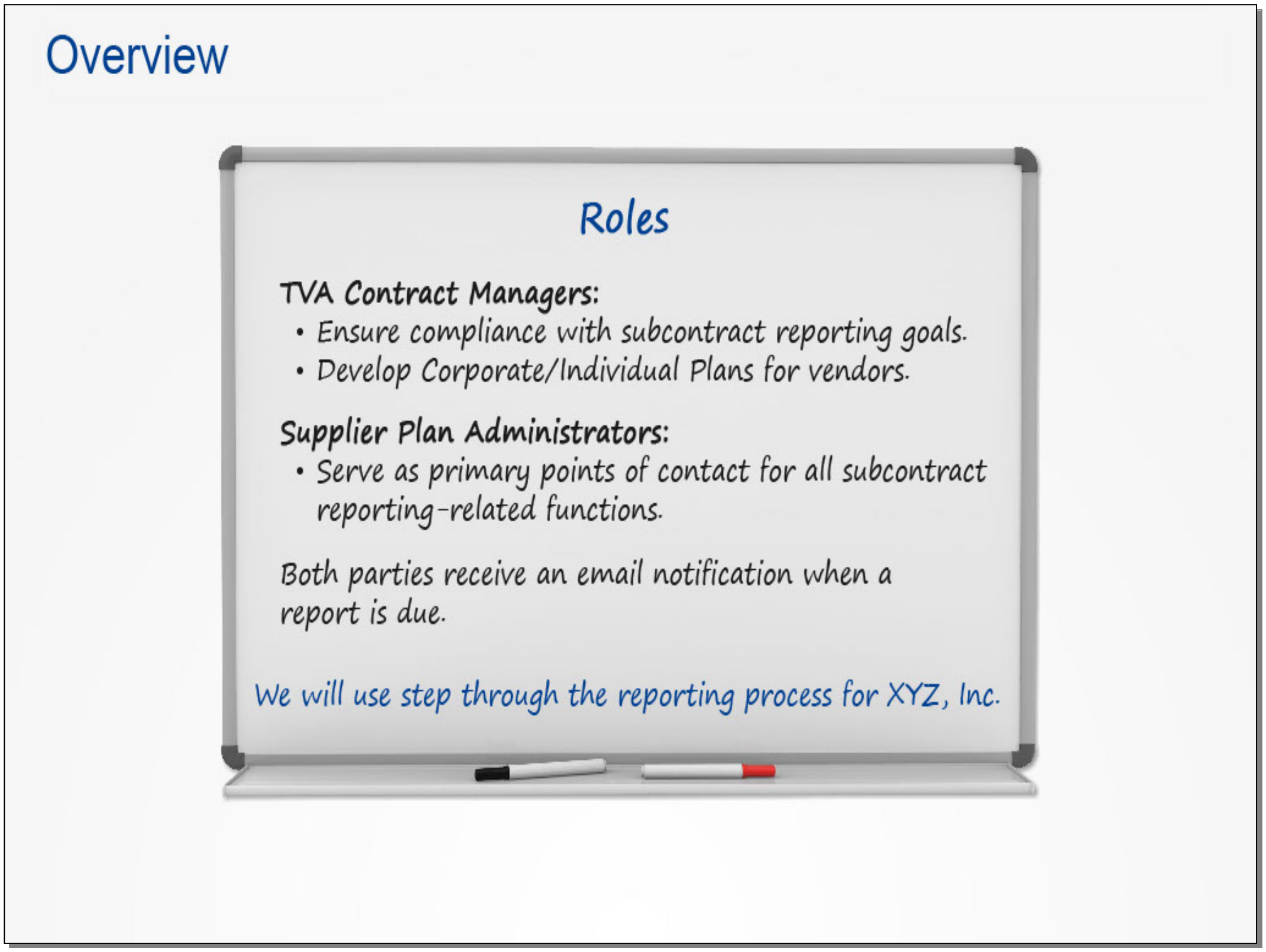
Veteran-owned

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.

Slide 80 - 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.

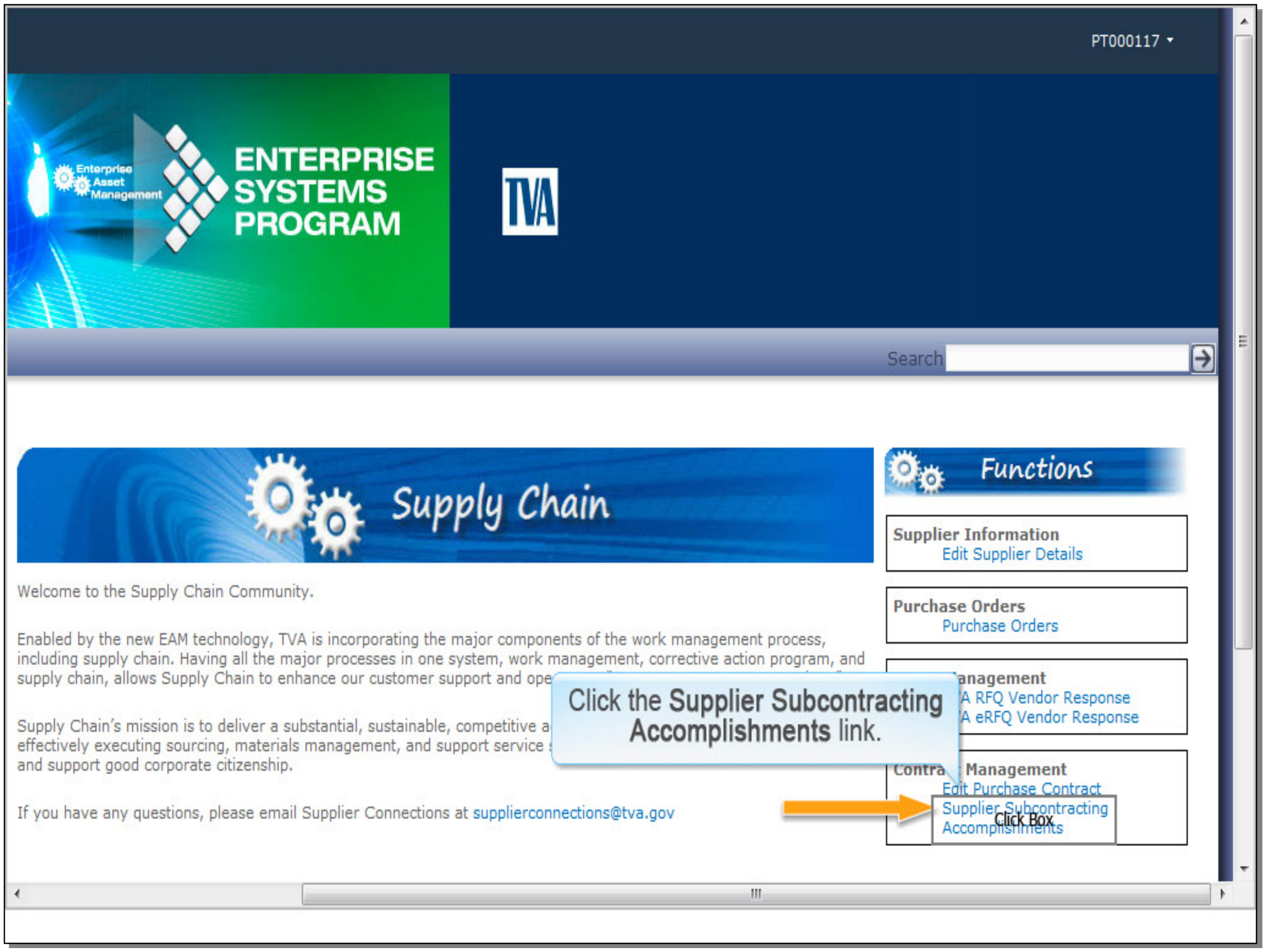
Develop Corporate/Individual Plans for vendors.

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



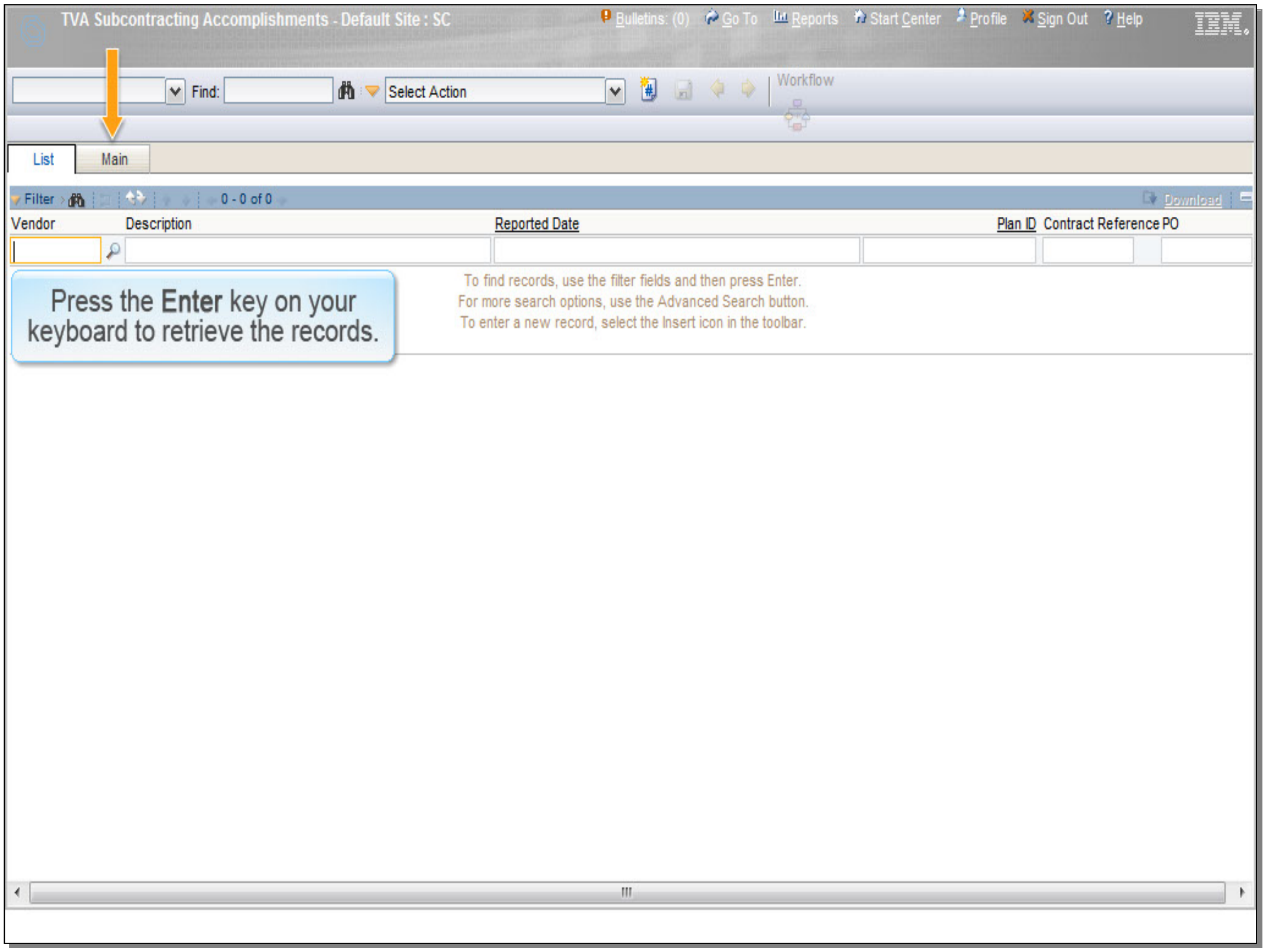
Slide notes

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



Slide notes

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

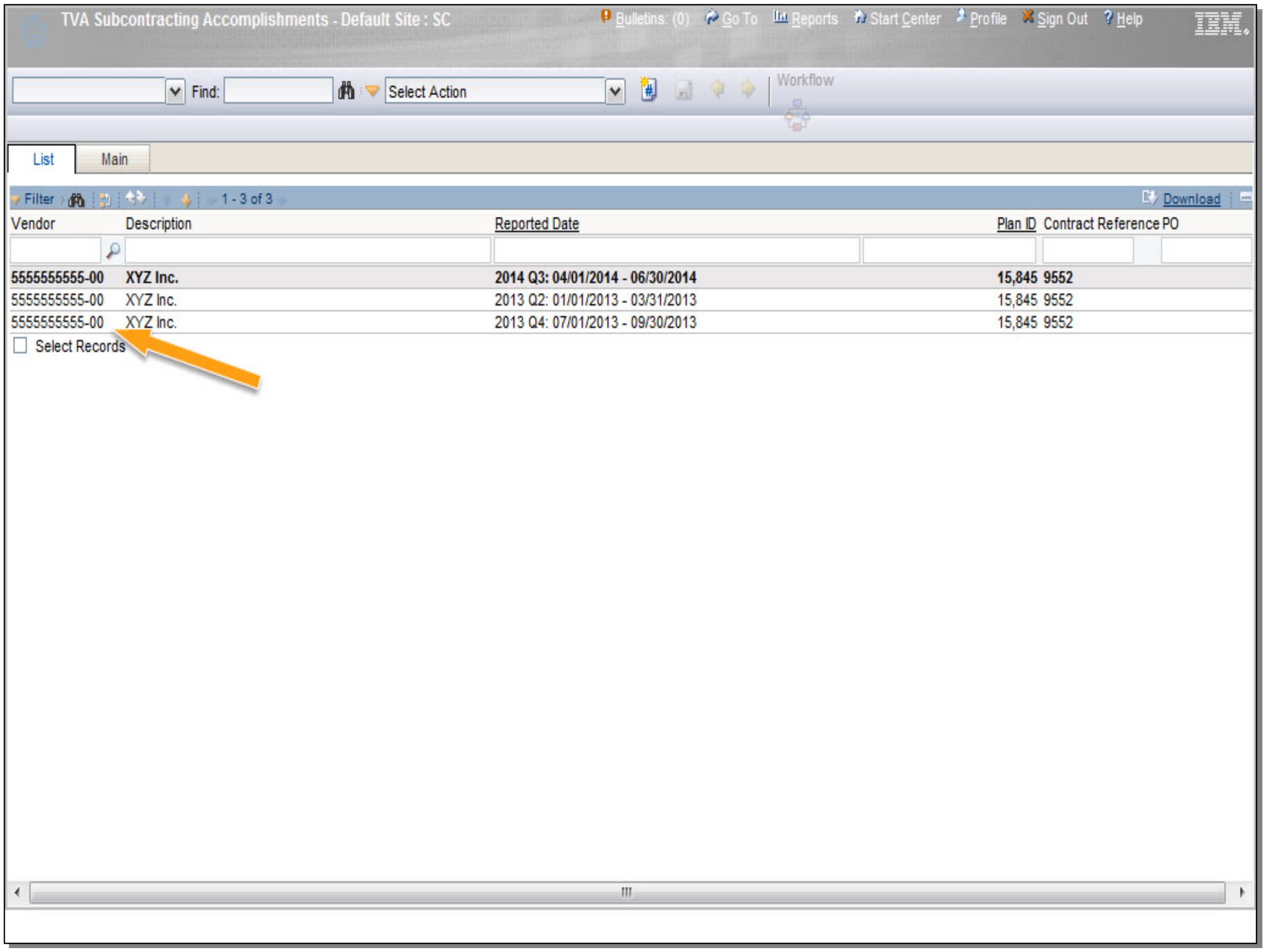
The Main tab is used to create and update new subcontracting accomplishments.

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

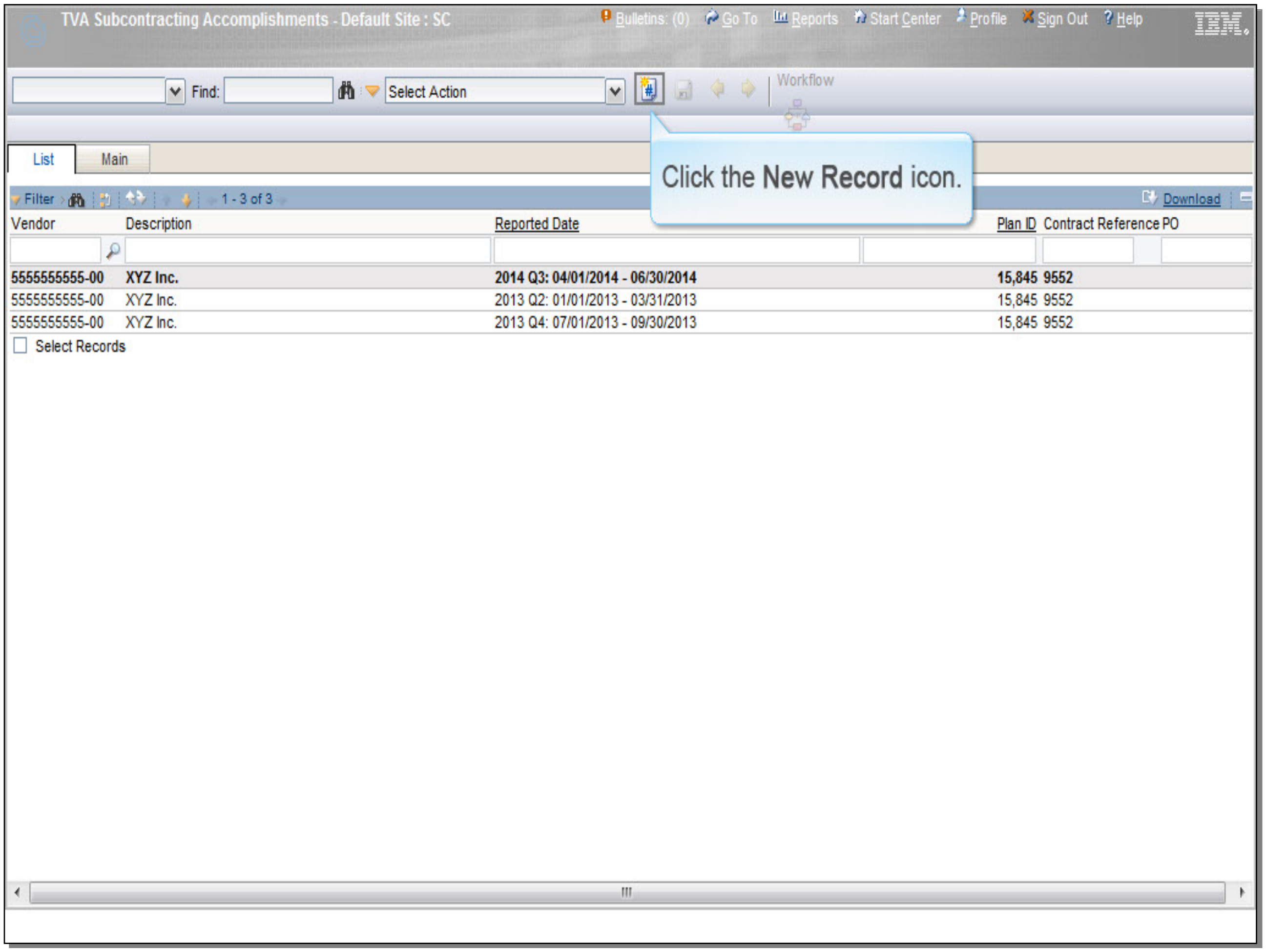


Slide notes

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



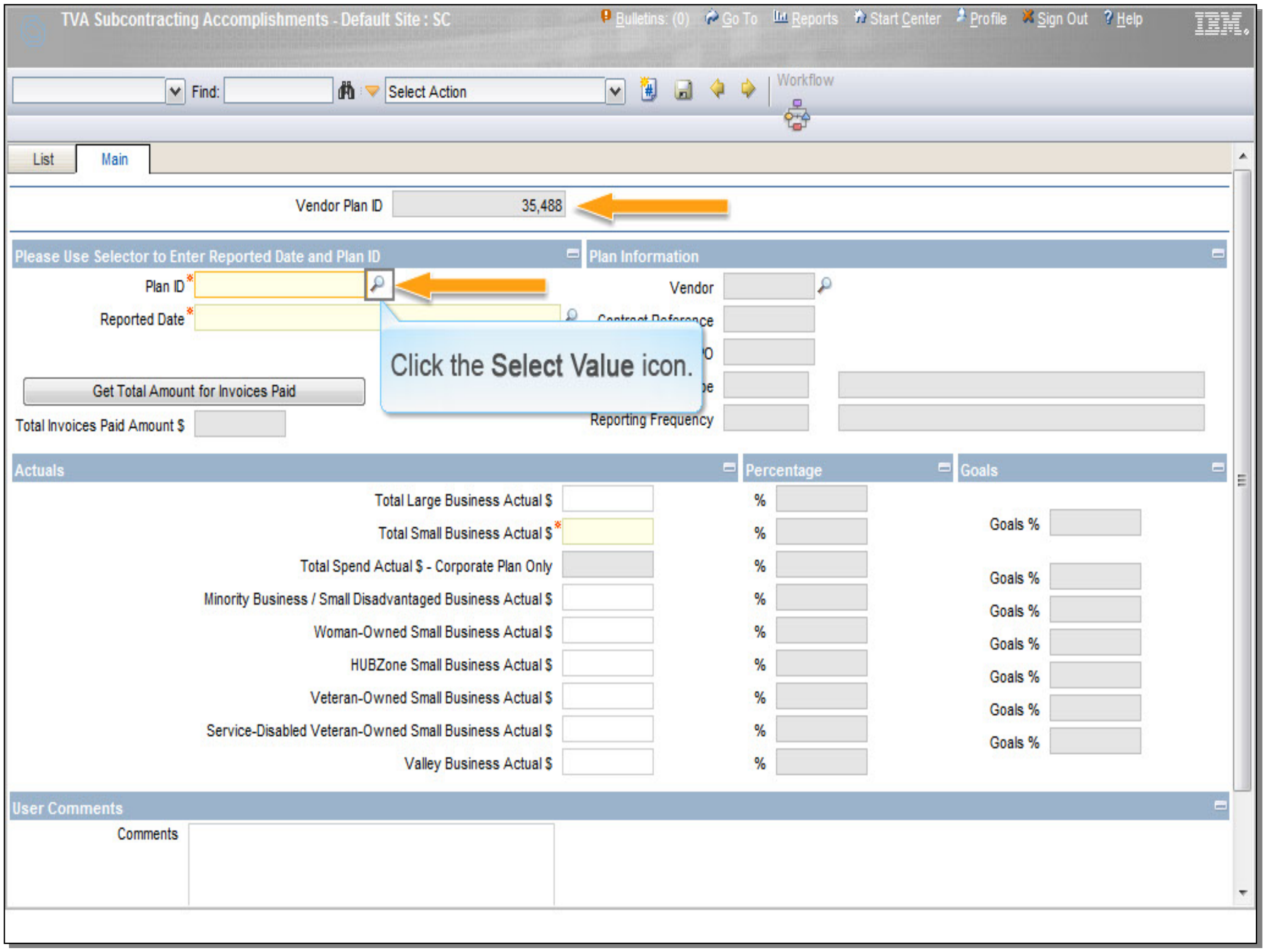
Slide notes

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



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.

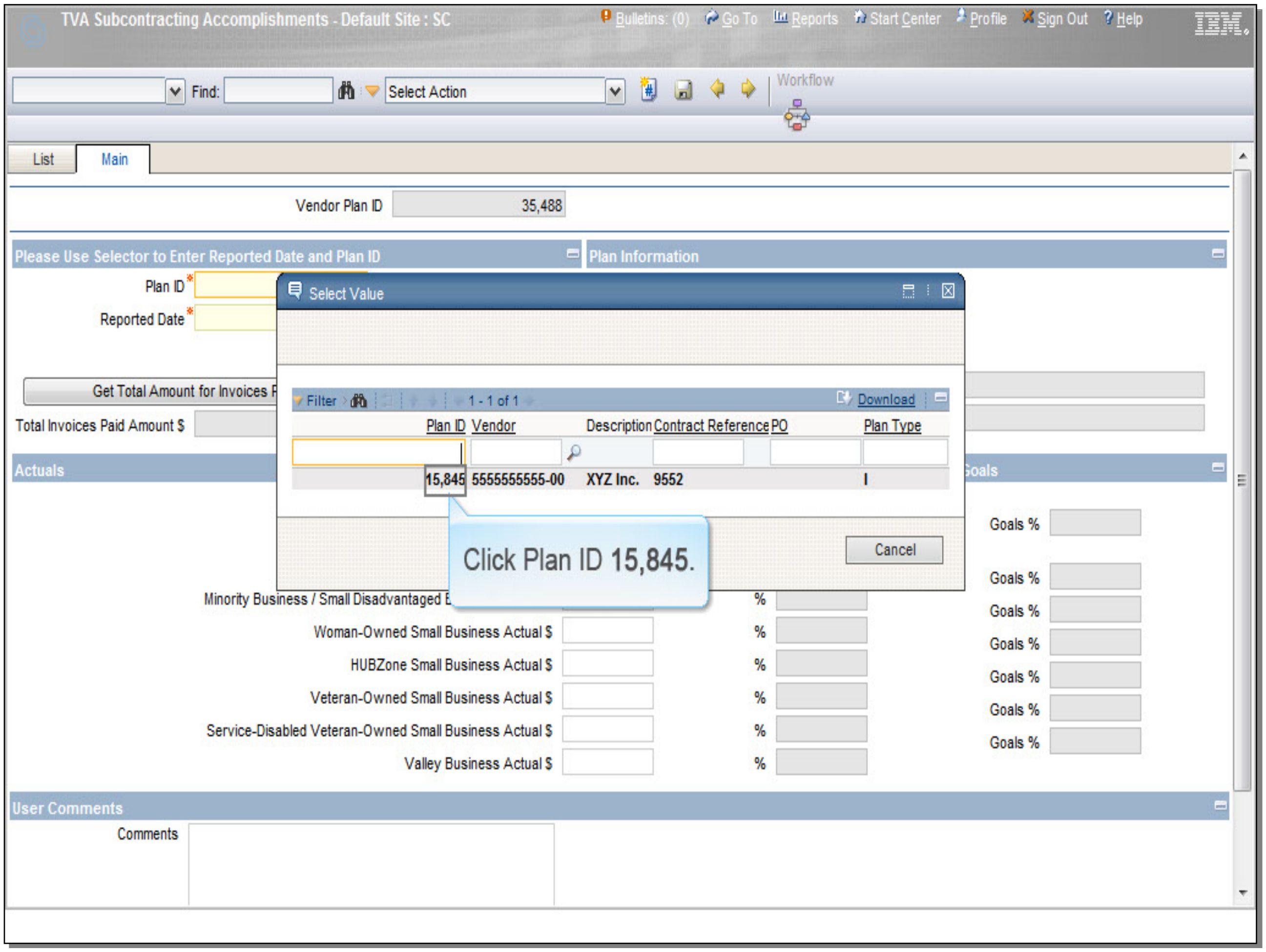
To create a record, you start by completing the information in the top section, and then enter the dollar amounts spent in the Actuals section.

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

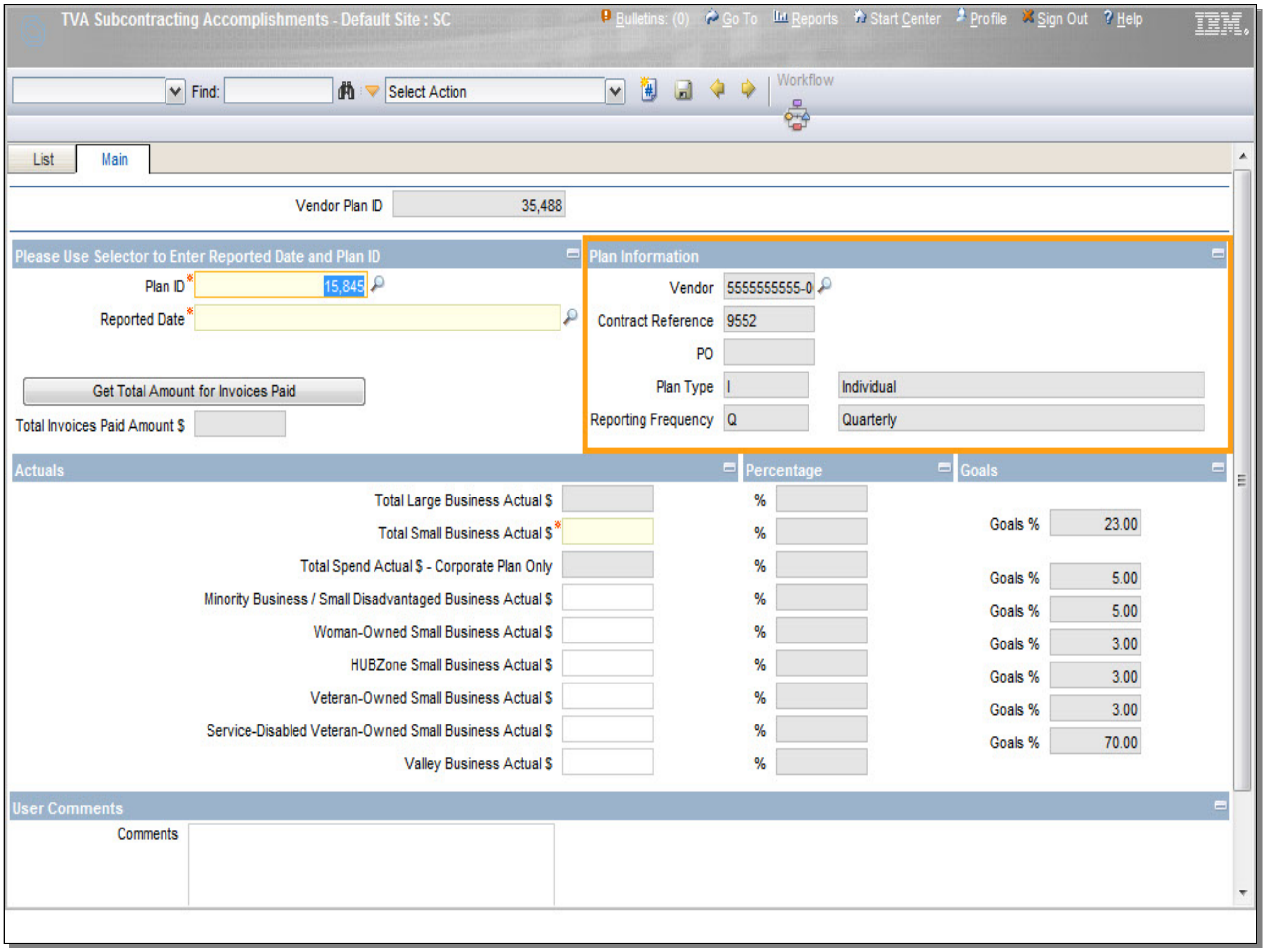


Slide notes

Text Captions

Click Plan ID **15,845**.

Slide 87 - Creating a Record



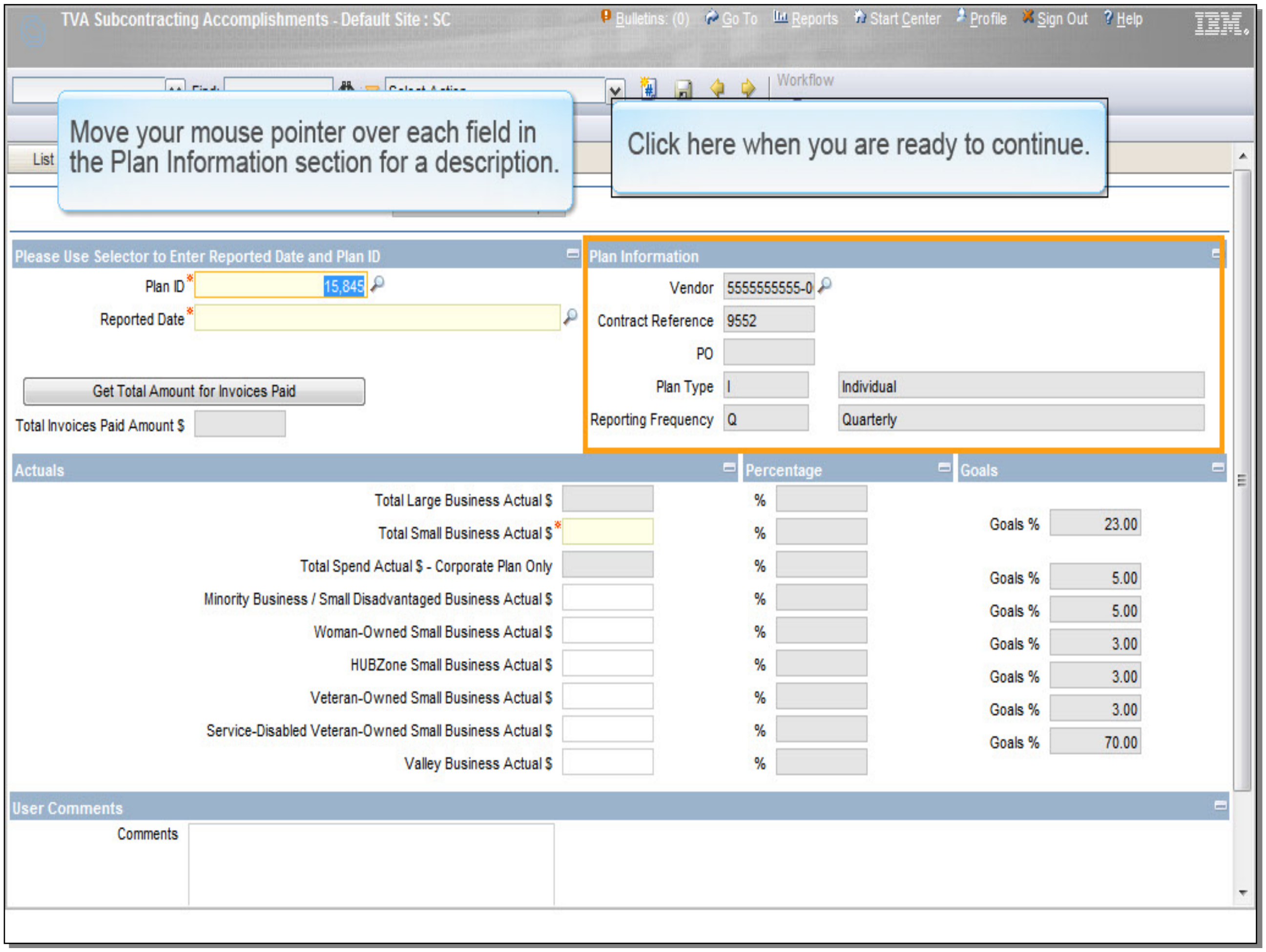
Slide notes

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



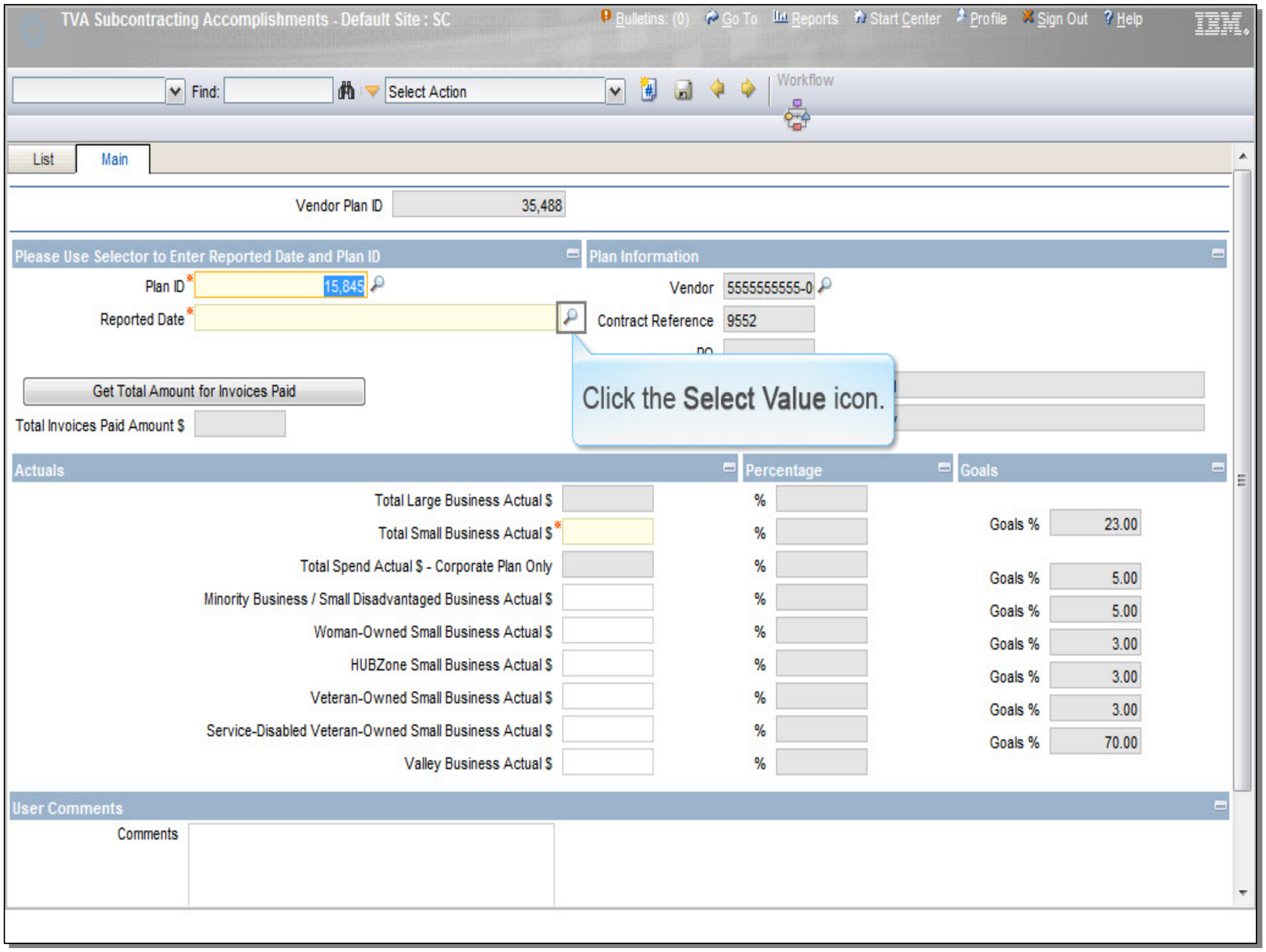
Slide notes

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



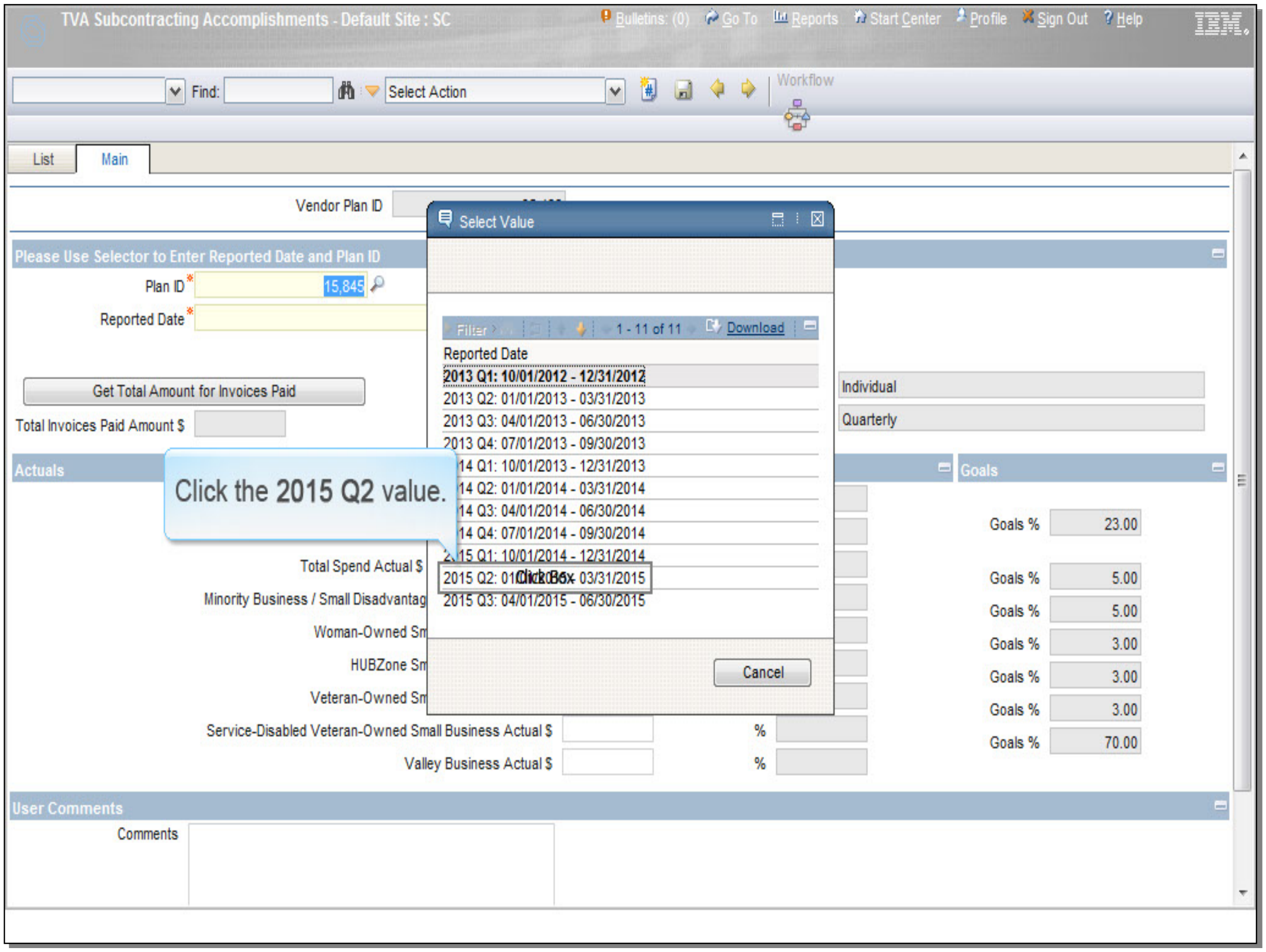
Slide notes

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

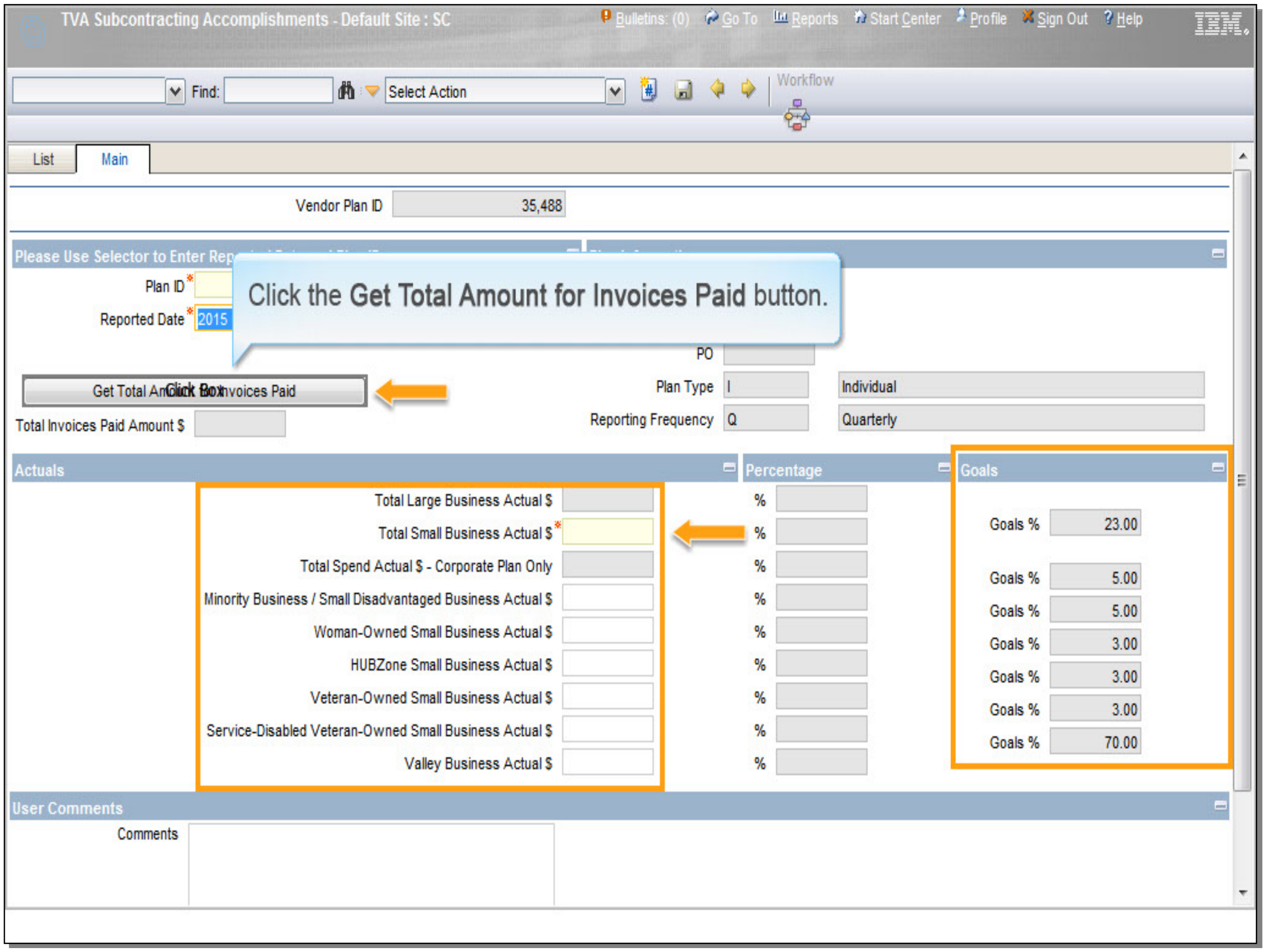


Slide notes

Text Captions

Click the **2015 Q2** value.

Slide 91 - Creating a Record



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.

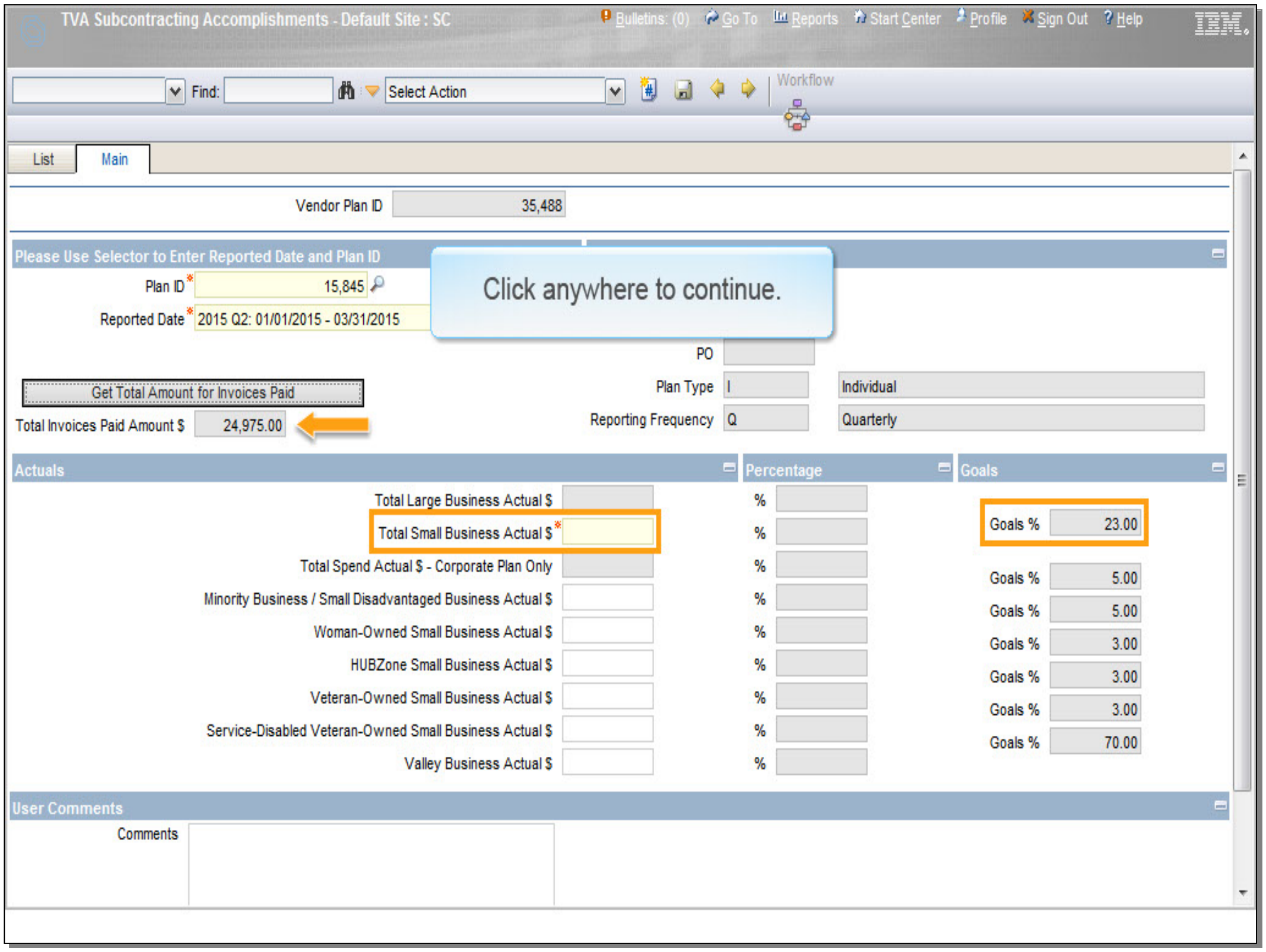
It's important to enter the total amount first, and then allocate that amount among the categories. Remember that the total amount cannot exceed the amount of invoices paid.

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



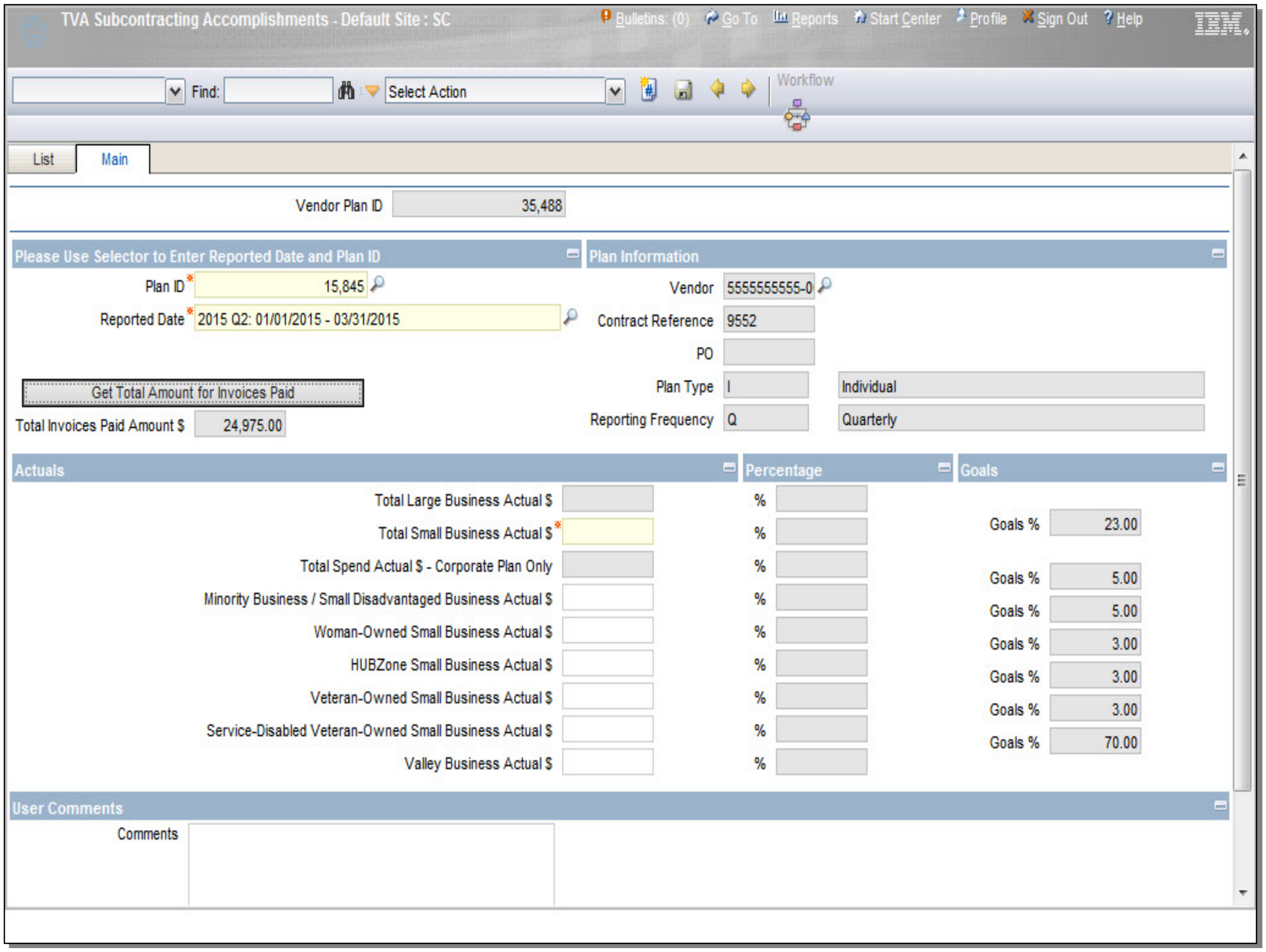
Slide notes

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

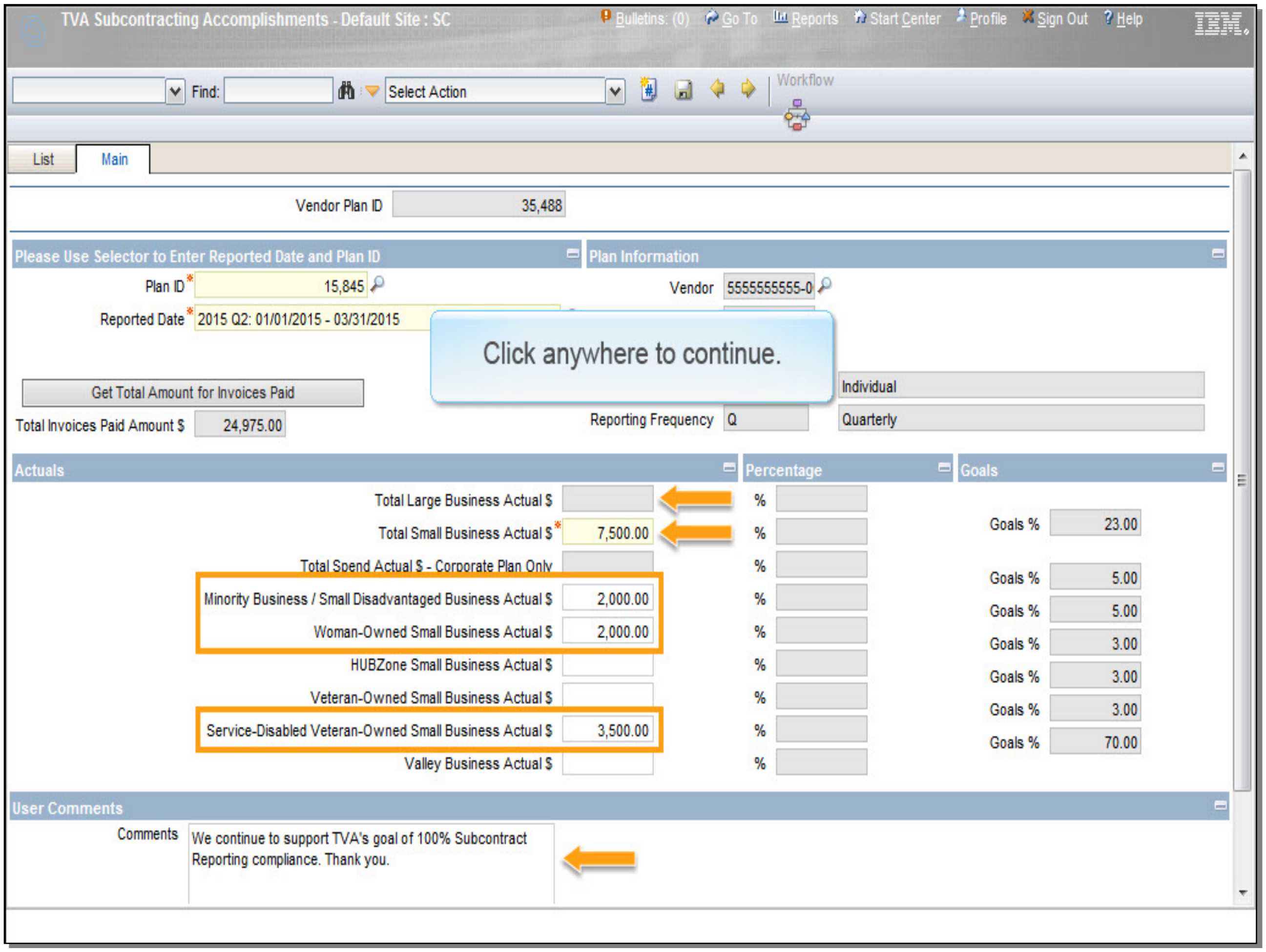


Slide notes

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

Text Captions

Slide 94 - Creating a Record



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.

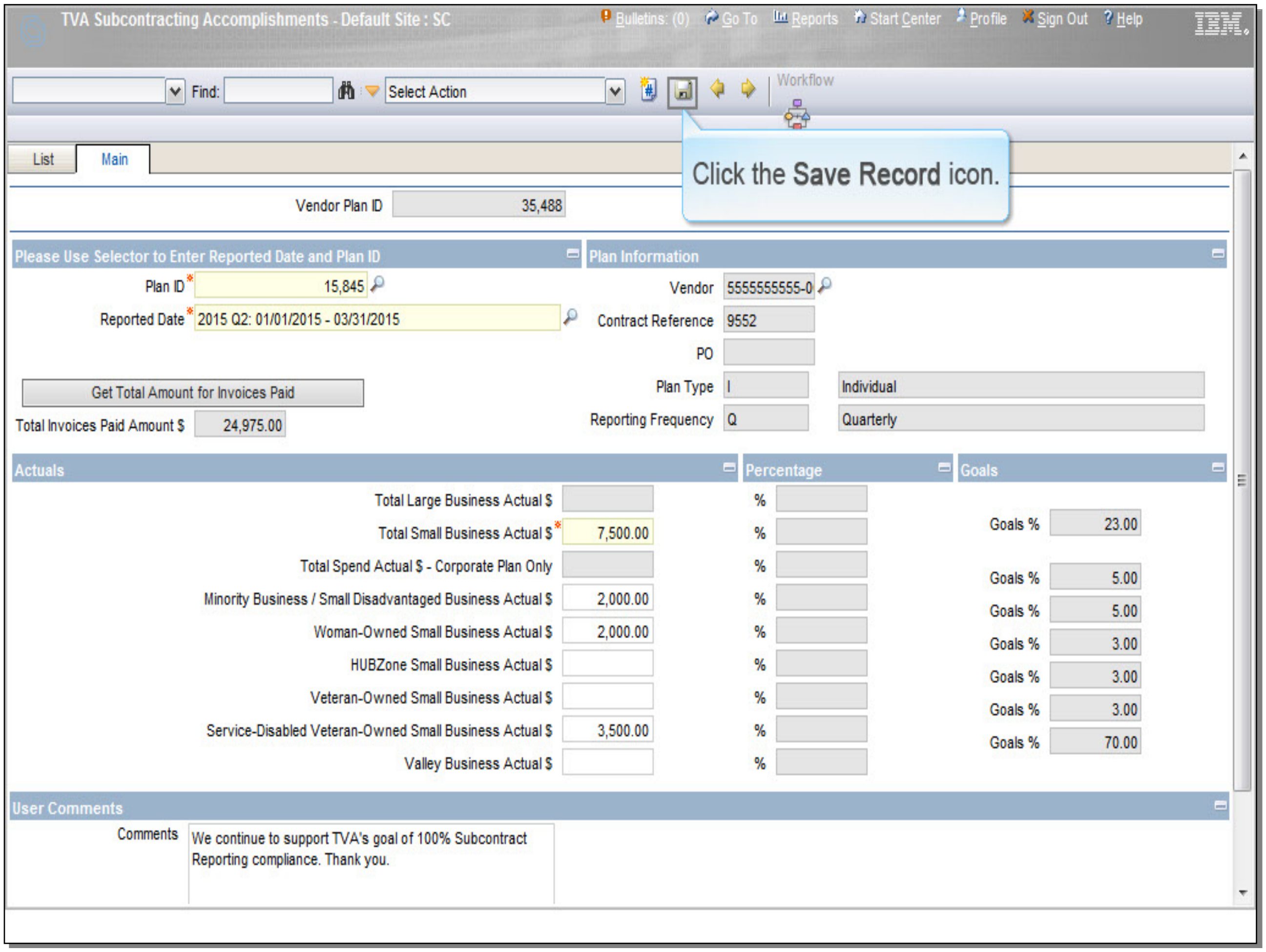
We also allocated the total amount among several categories.

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

Text Captions

Click anywhere to continue.

Slide 95 - Creating a Record



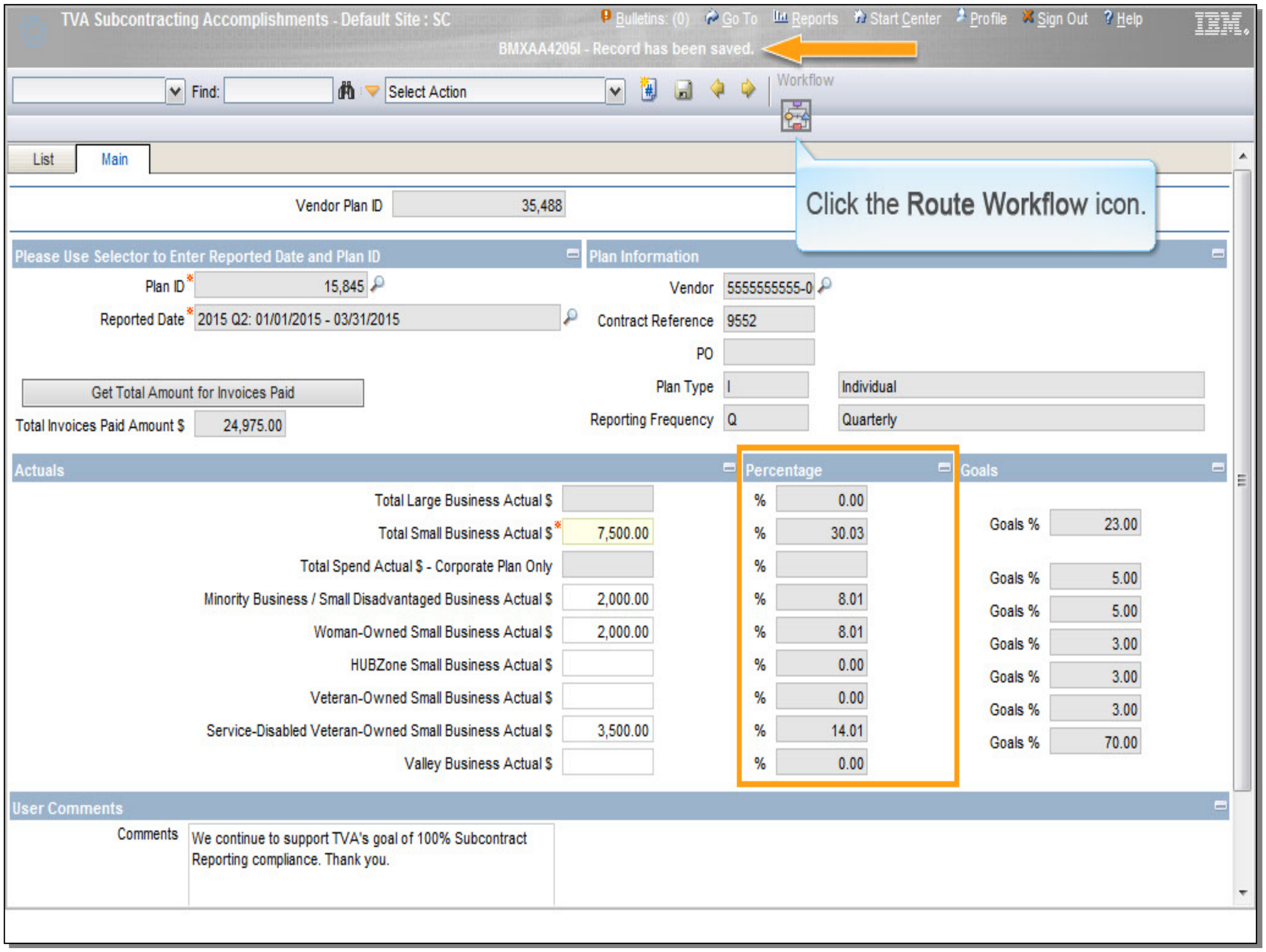
Slide notes

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



Slide notes

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

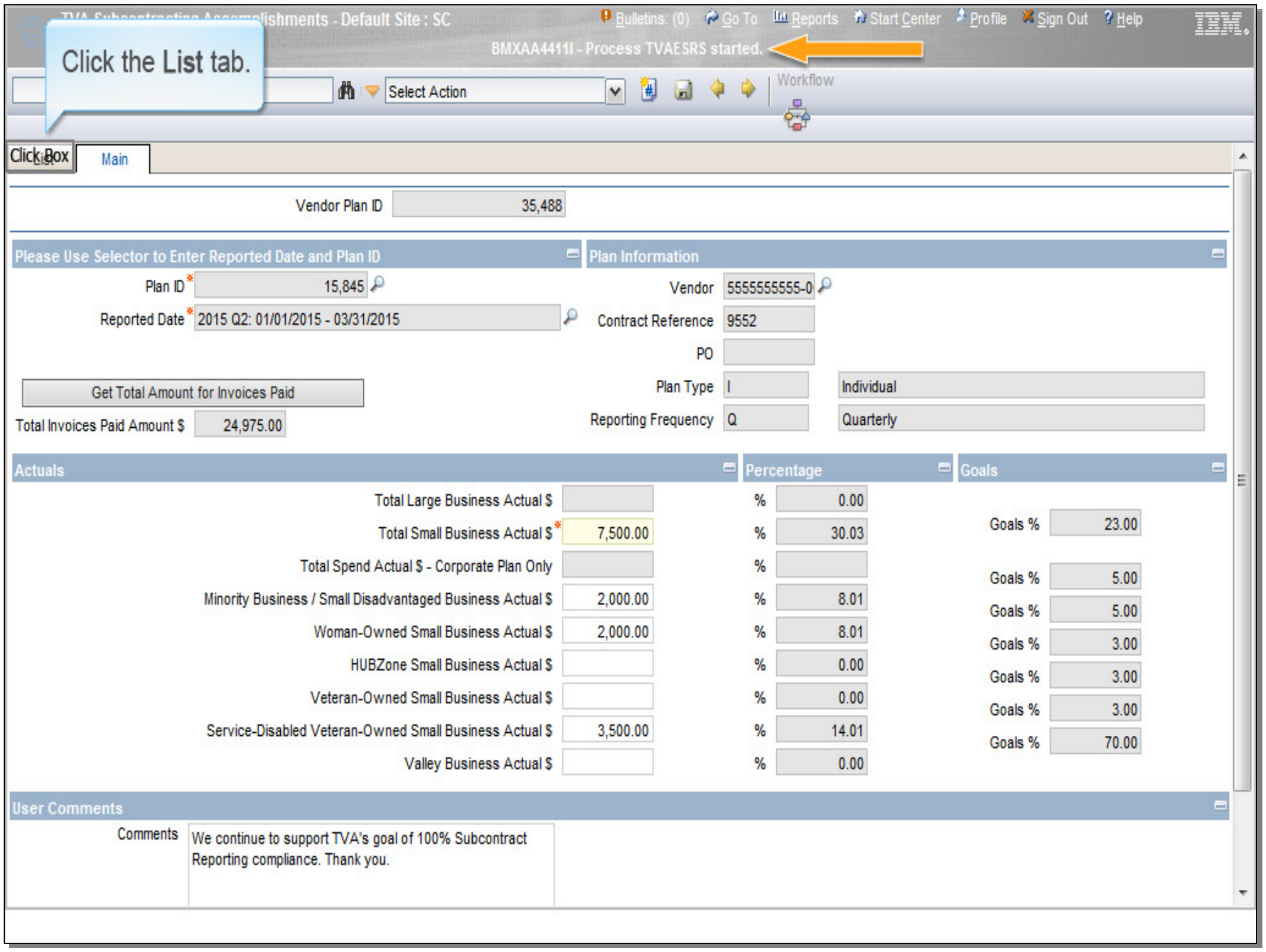
The Percentages fields have been populated based on the actuals just entered. You can then compare the actual percentages to the goal percentages.

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



Slide notes

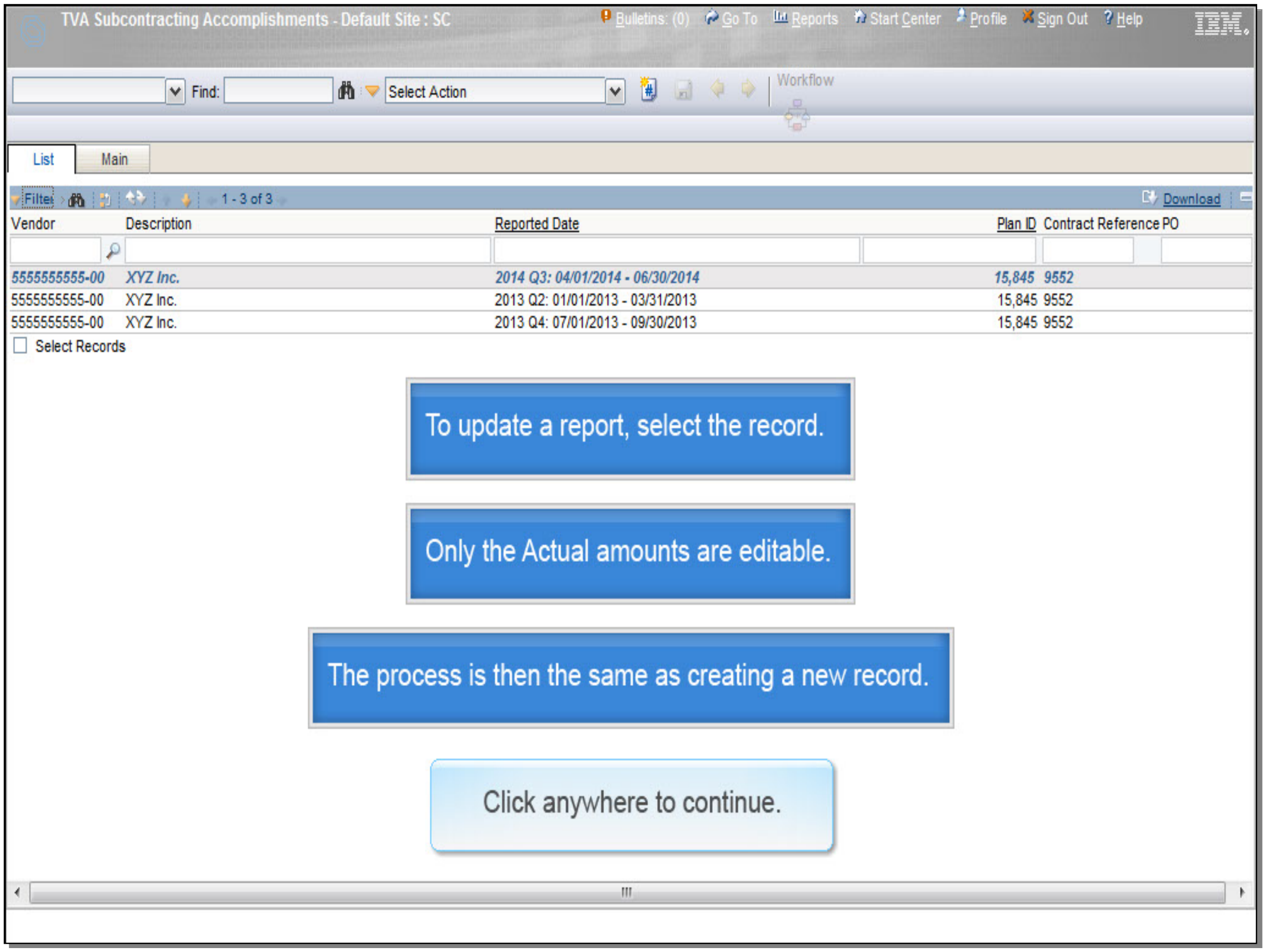
The message HERE indicates that the record was submitted. Both you and the TVA Contract Manager will receive an email notification containing the details of the record.

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

Text Captions

Click the **List** tab.

Slide 98 - Updating a Record



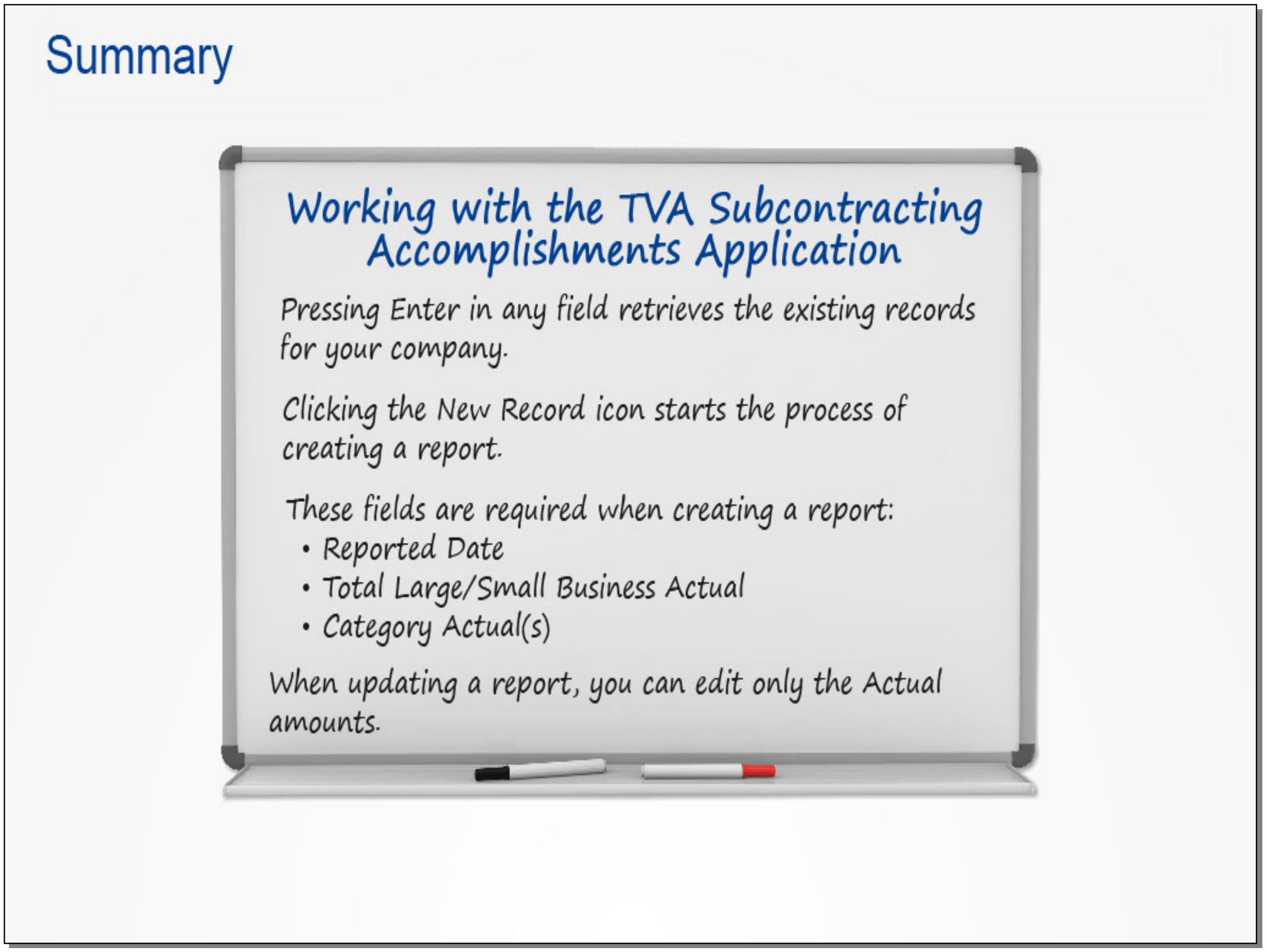
Slide notes

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.

Slide 99 - 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.

Slide 100 - Introduction

Slide notes

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

Text Captions

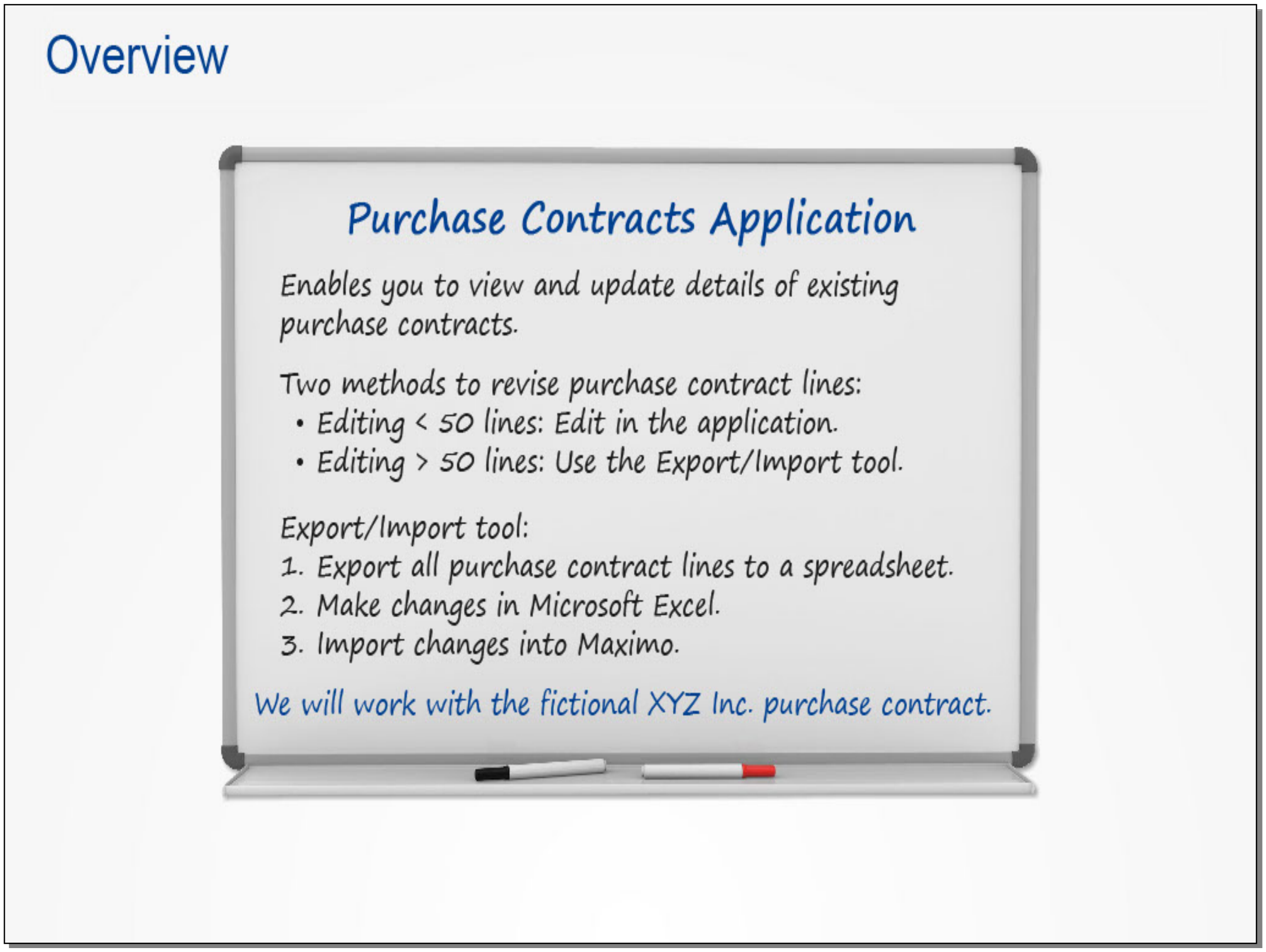
Overview

Accessing the Application

Revising a Purchase Contract

Using the Export/Import Tool

Slide 101 - Overview



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.

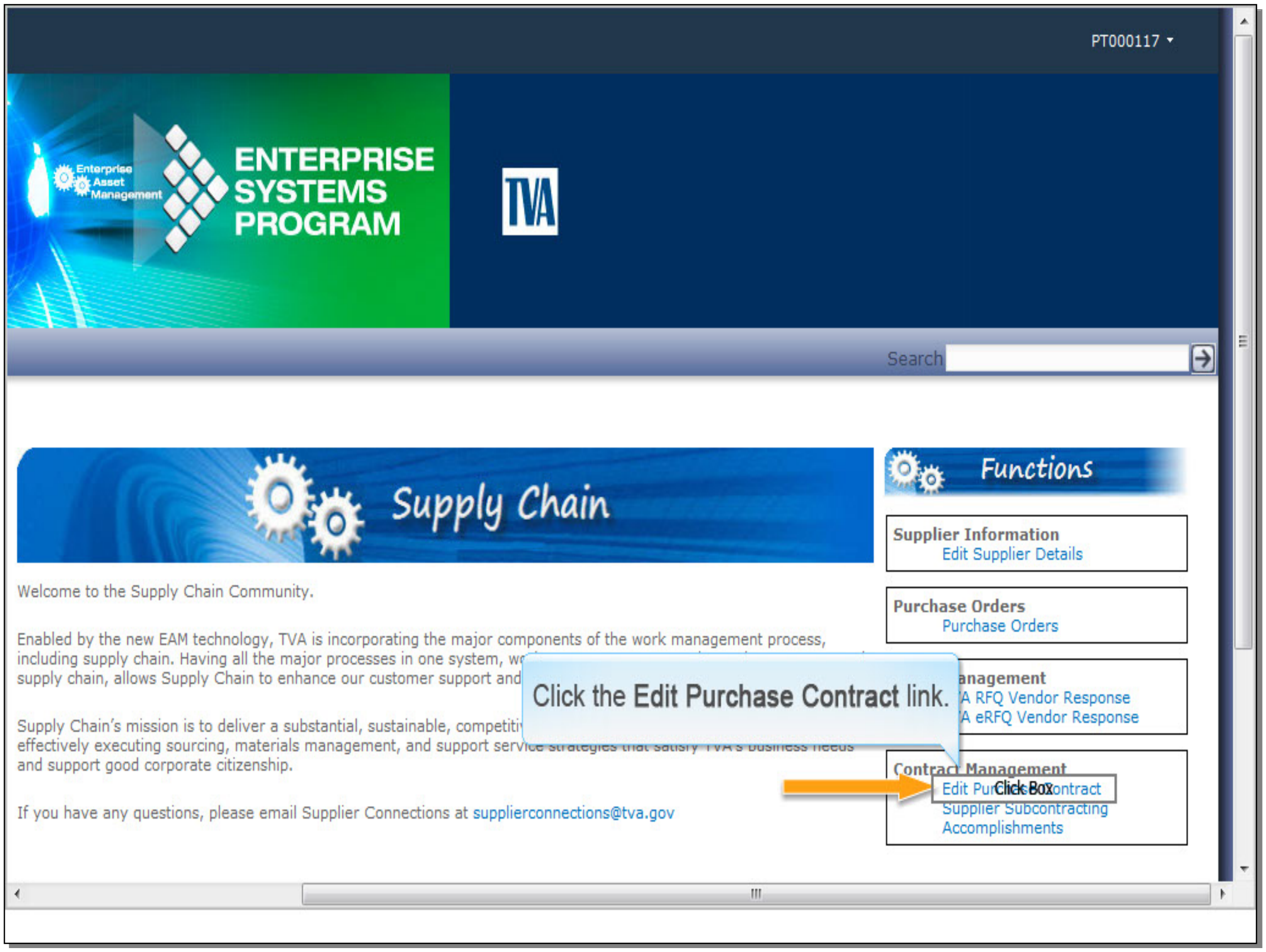
Editing > 50 lines: Use the Export/Import tool.

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



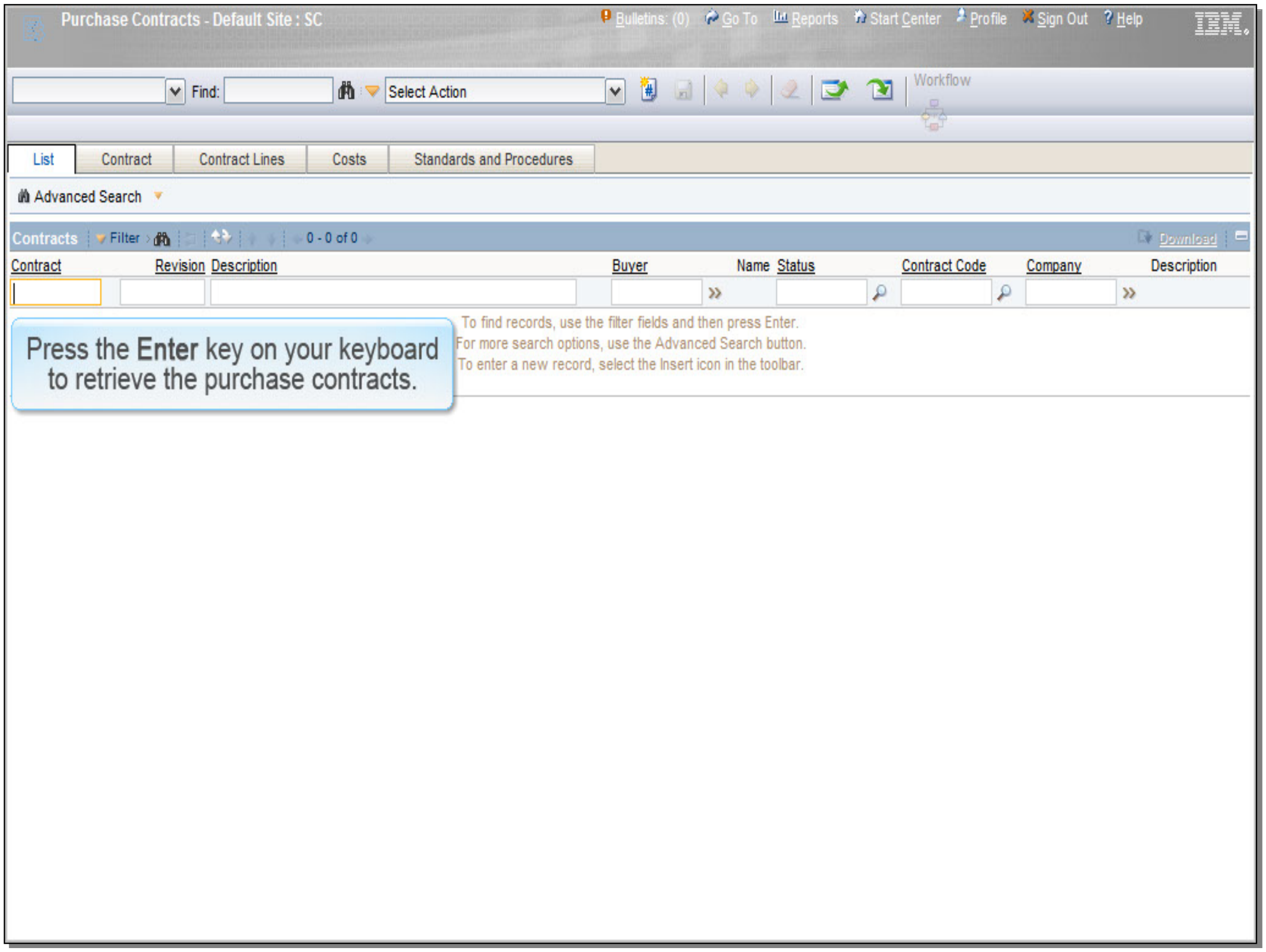
Slide notes

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

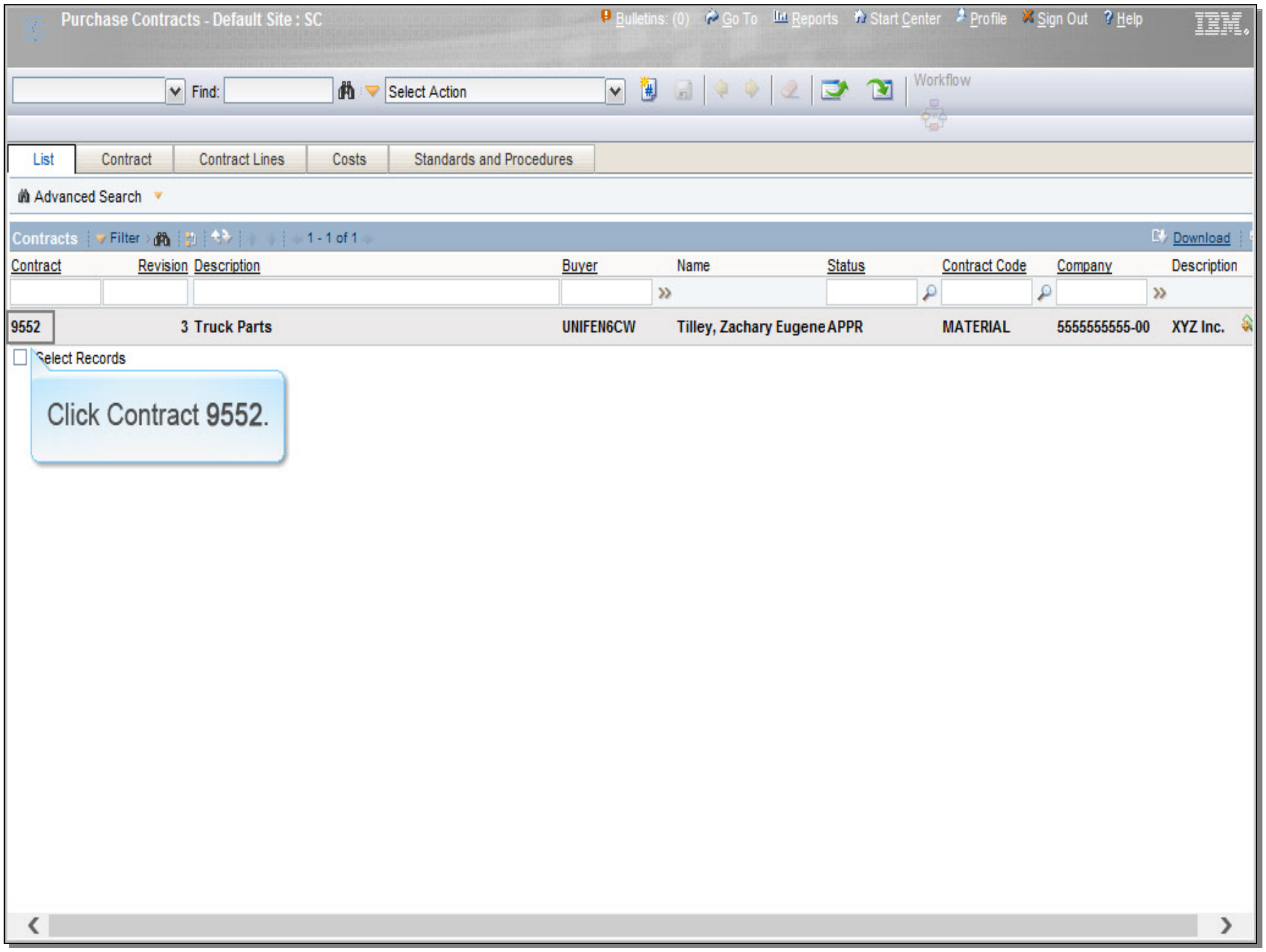
The application is now open with the List tab displayed.

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

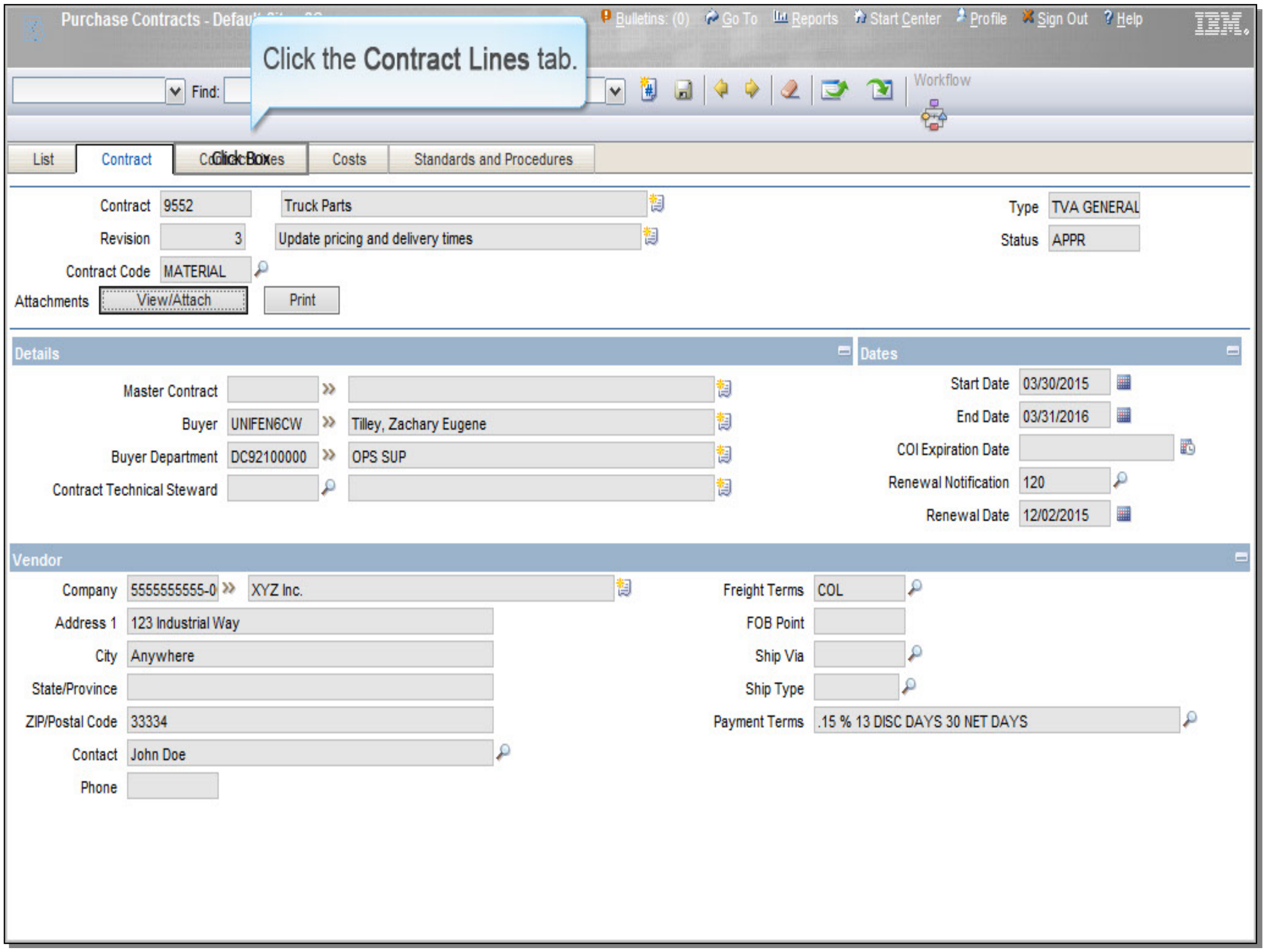


Slide notes

Text Captions

Click Contract **9552**.

Slide 105 - Revising a Purchase Contract



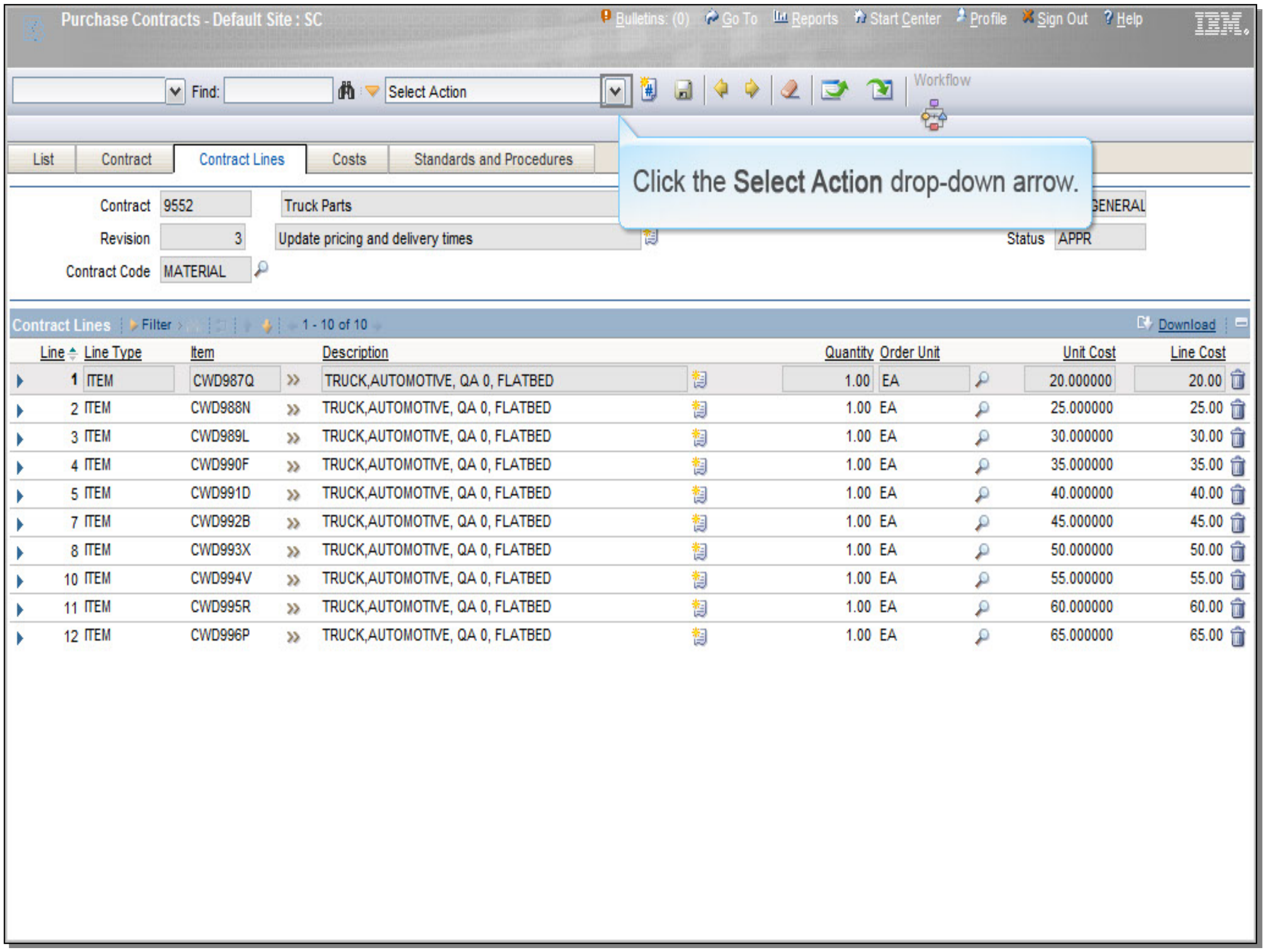
Slide notes

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



Slide notes

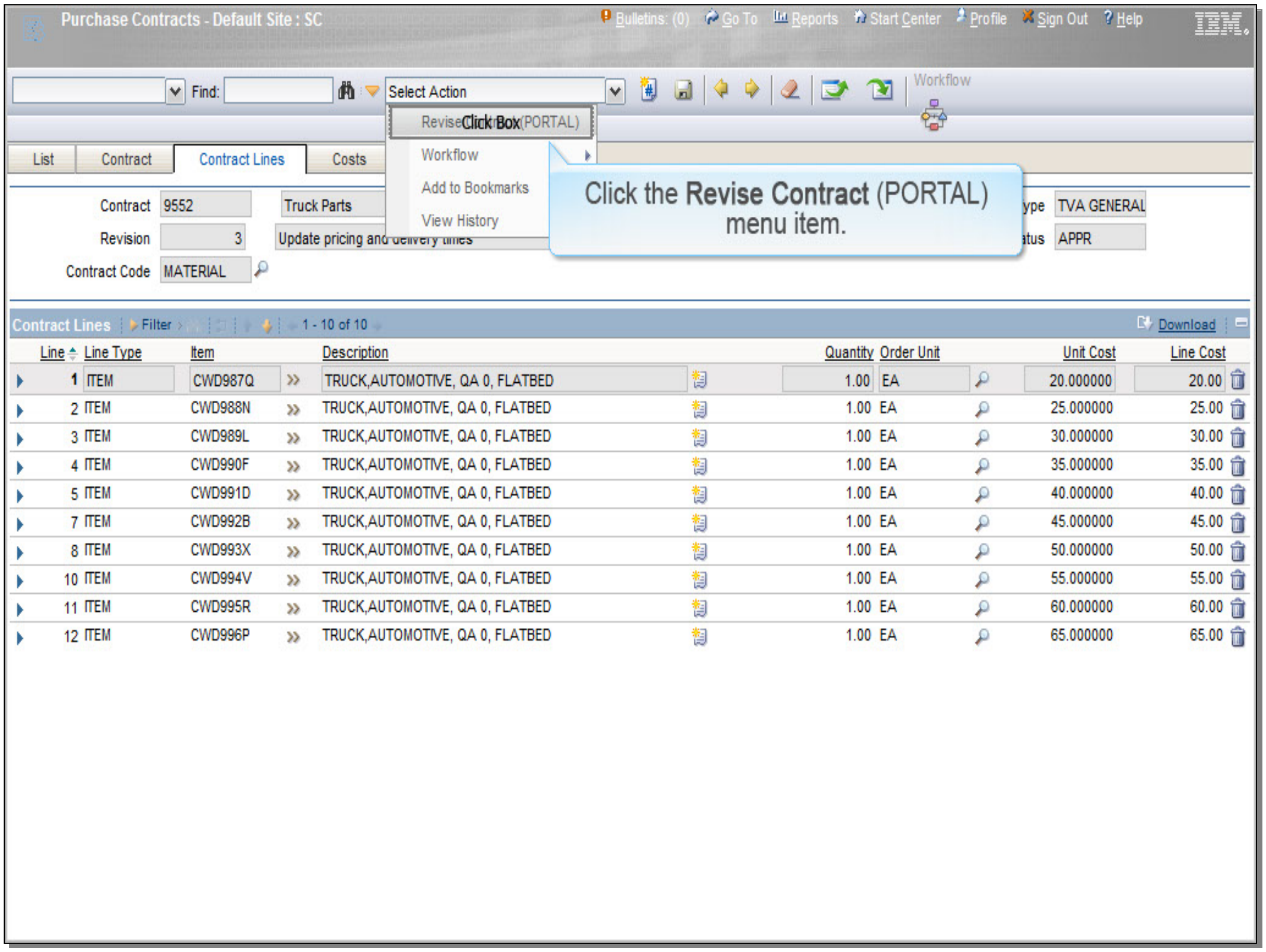
Here you see all of the lines associated with this contract.

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

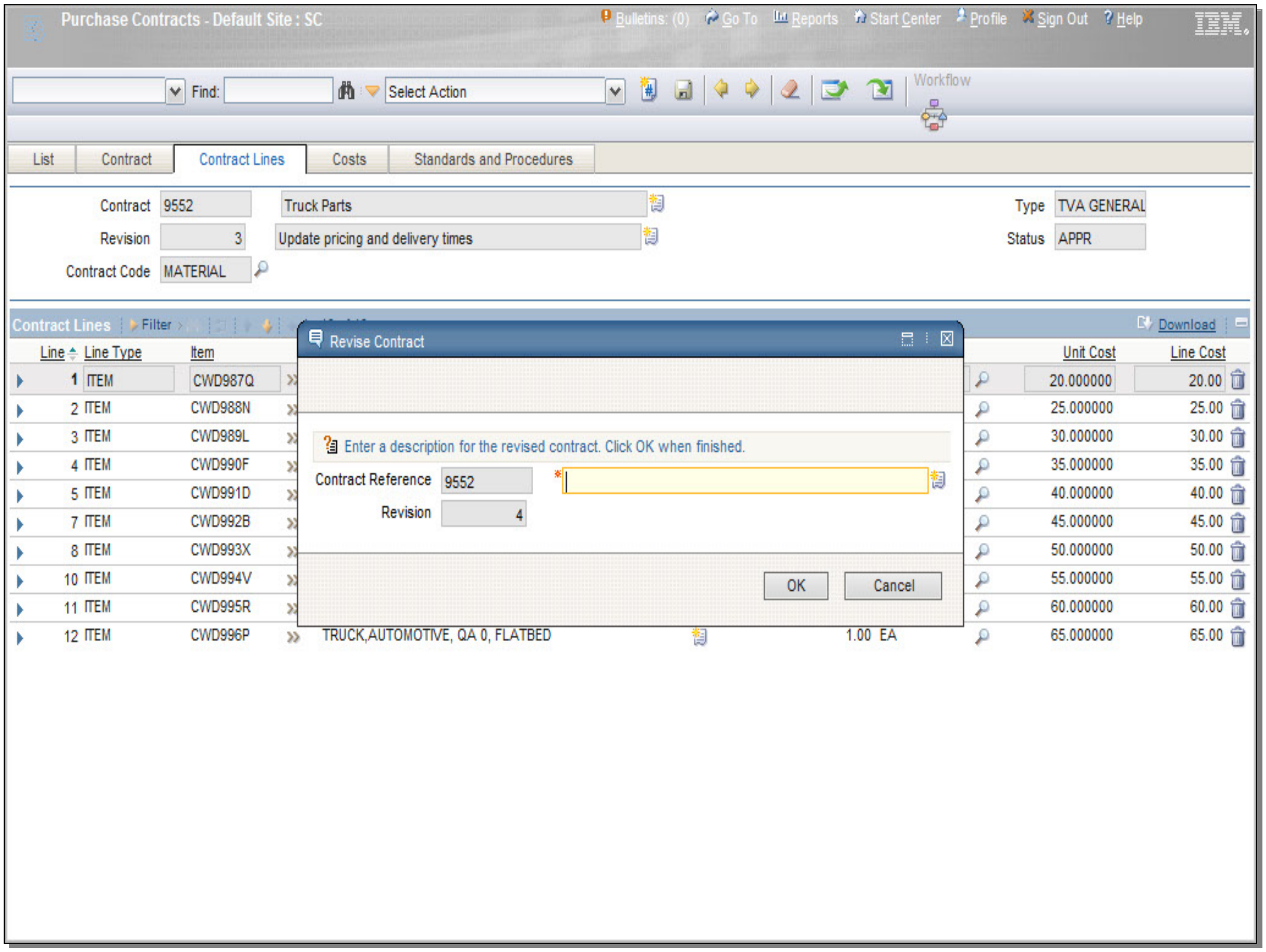


Slide notes

Text Captions

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

Slide 108 - Revising a Purchase Contract

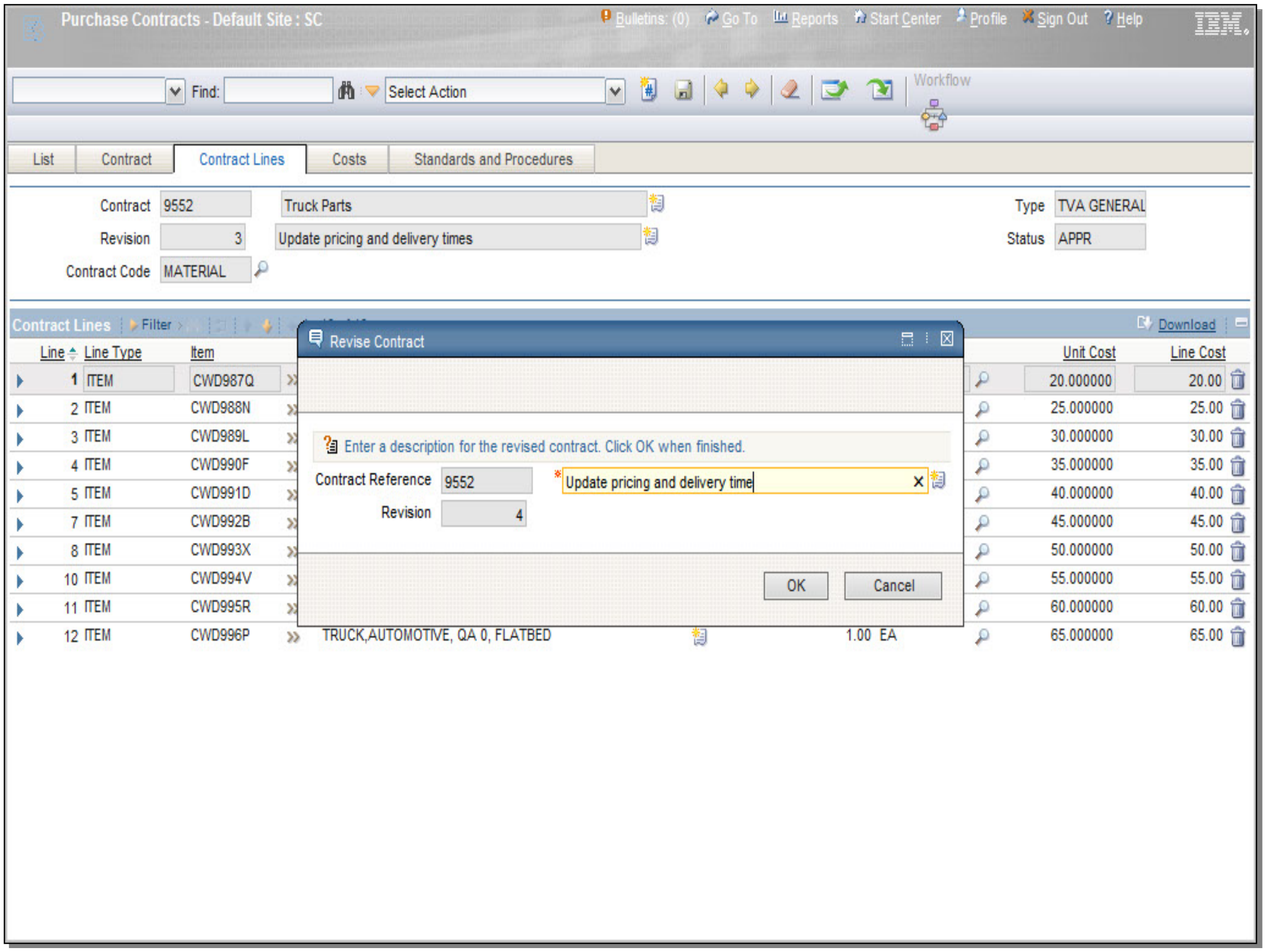


Slide notes

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

Text Captions

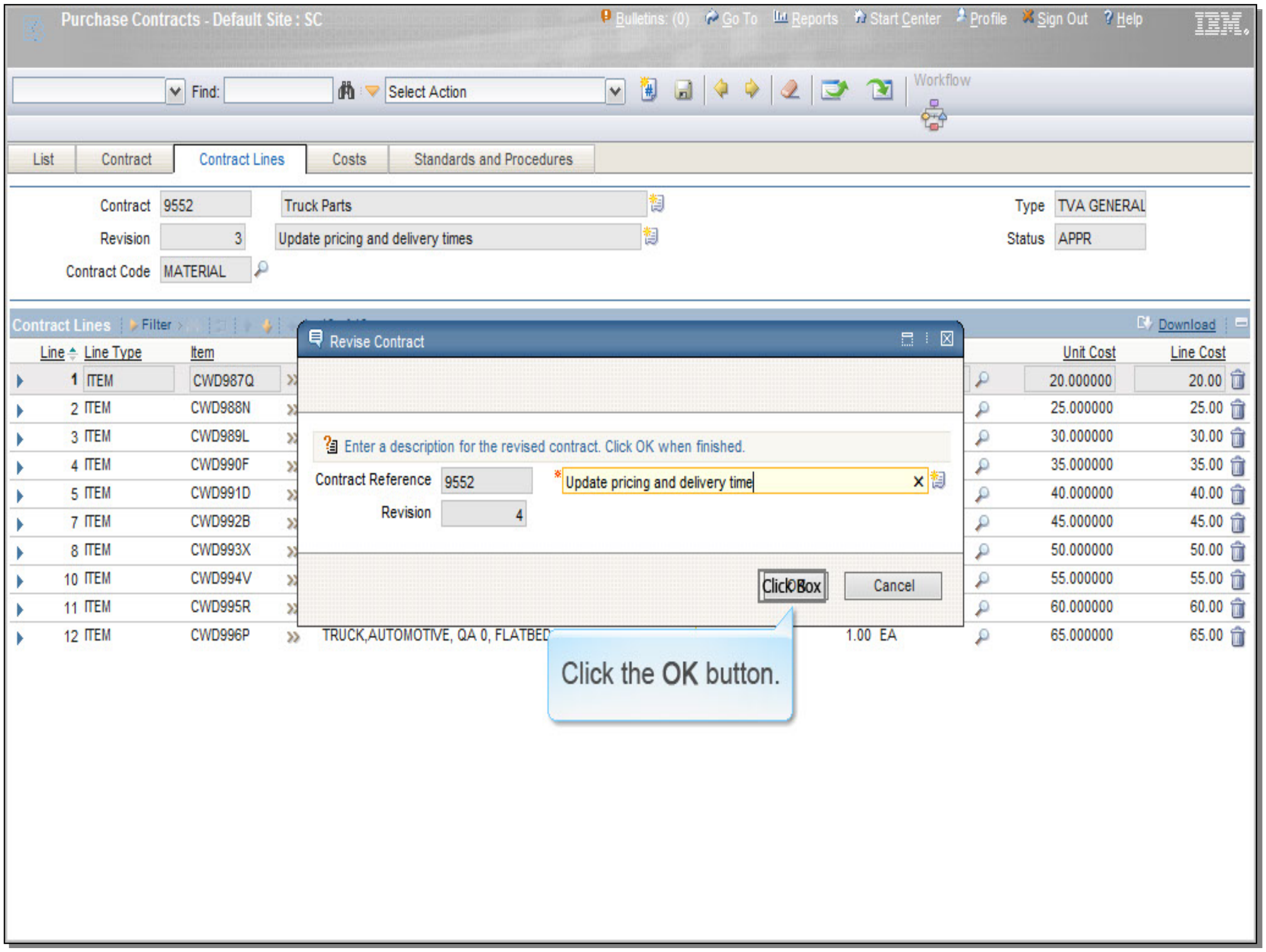
Slide 109 - Revising a Purchase Contract



Slide notes

Text Captions

Slide 110 - Revising a Purchase Contract



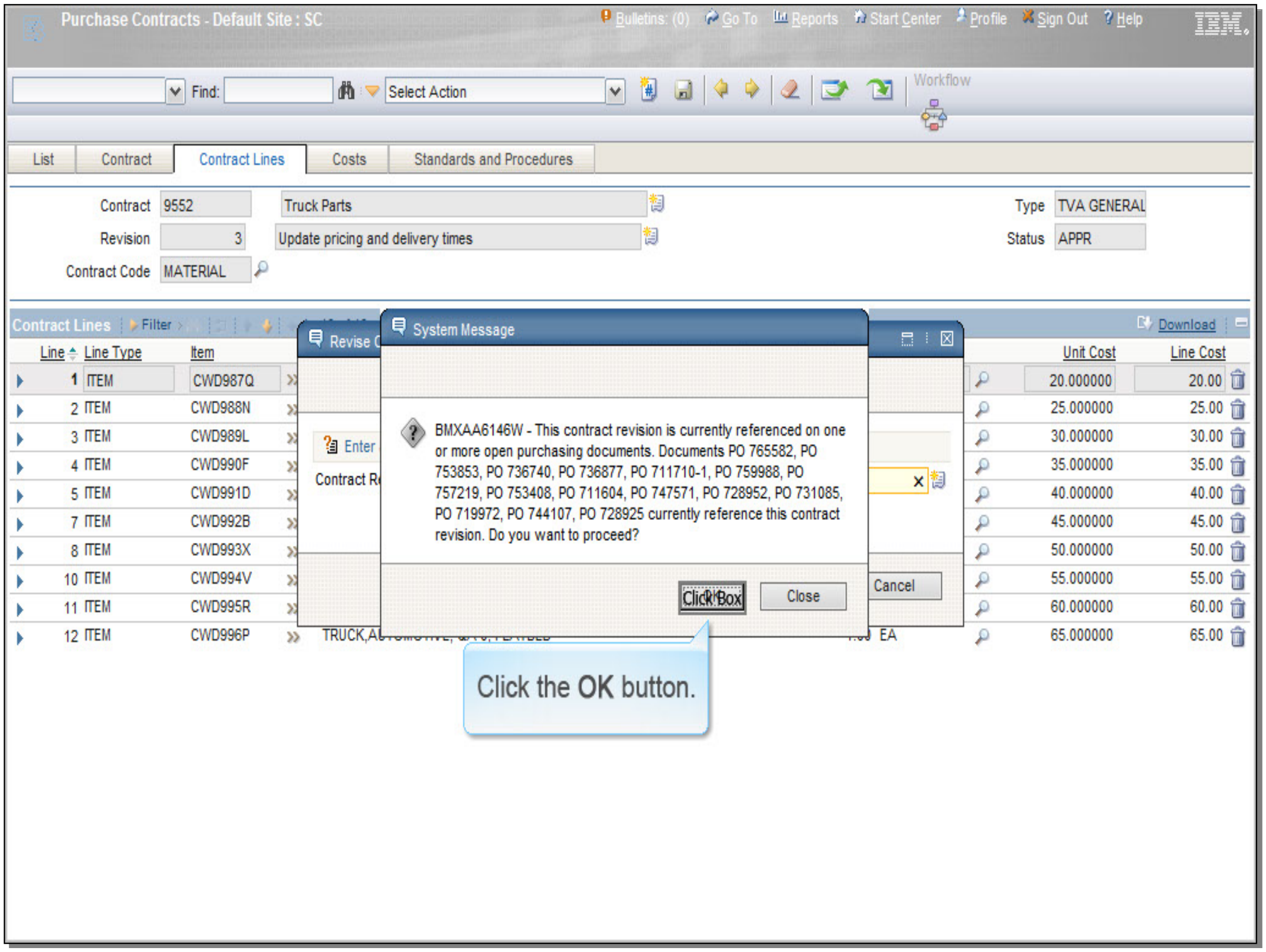
Slide notes

Look this over and then click OK.

Text Captions

Click the **OK** button.

Slide 111 - Revising a Purchase Contract



Slide notes

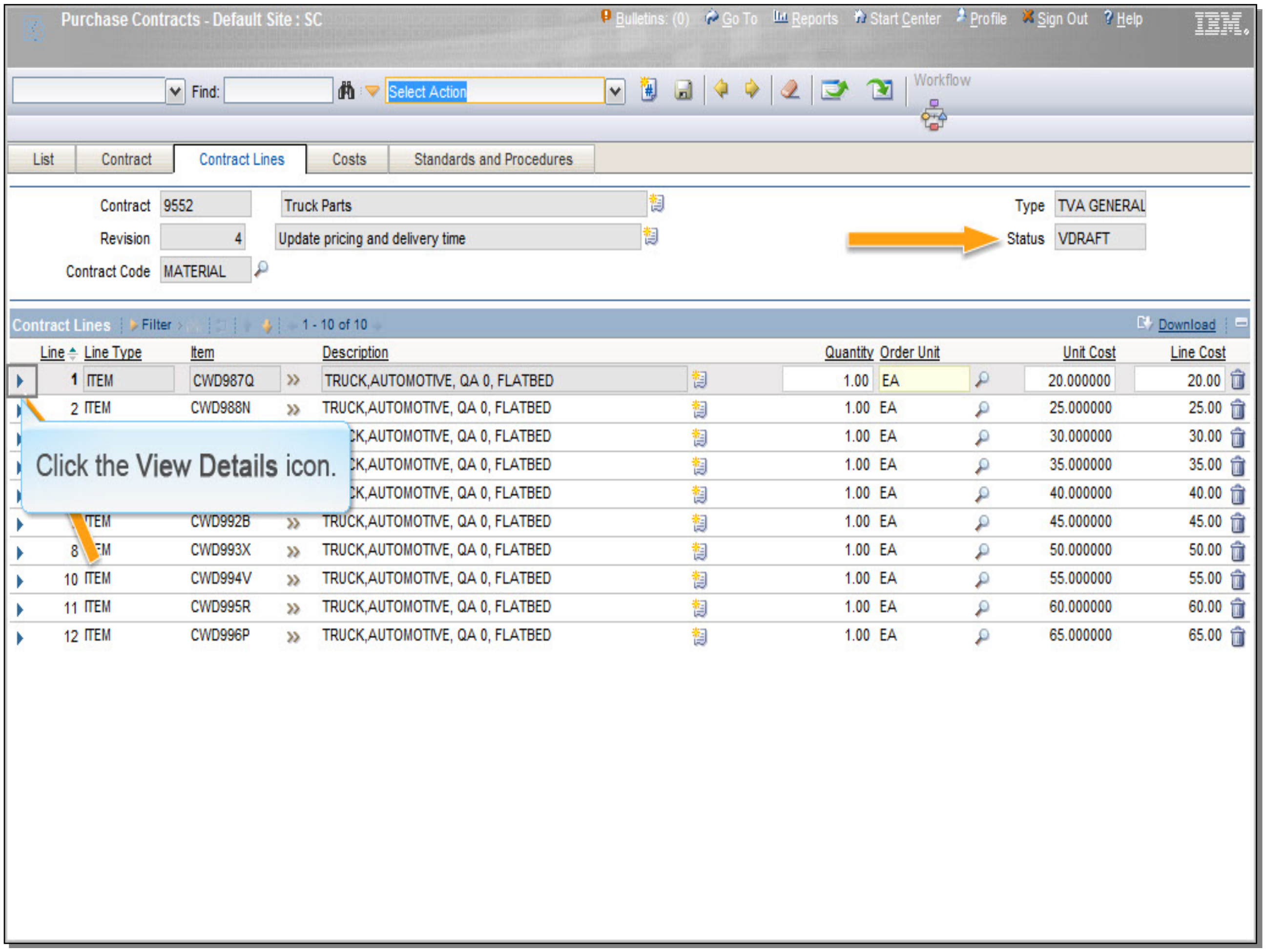
This system message is informing us that the contract we're revising is referenced in one or more existing purchase orders. The PO numbers are listed here.

Look over the message and then click OK.

Text Captions

Click the **OK** button.

Slide 112 - Revising a Purchase Contract



Slide notes

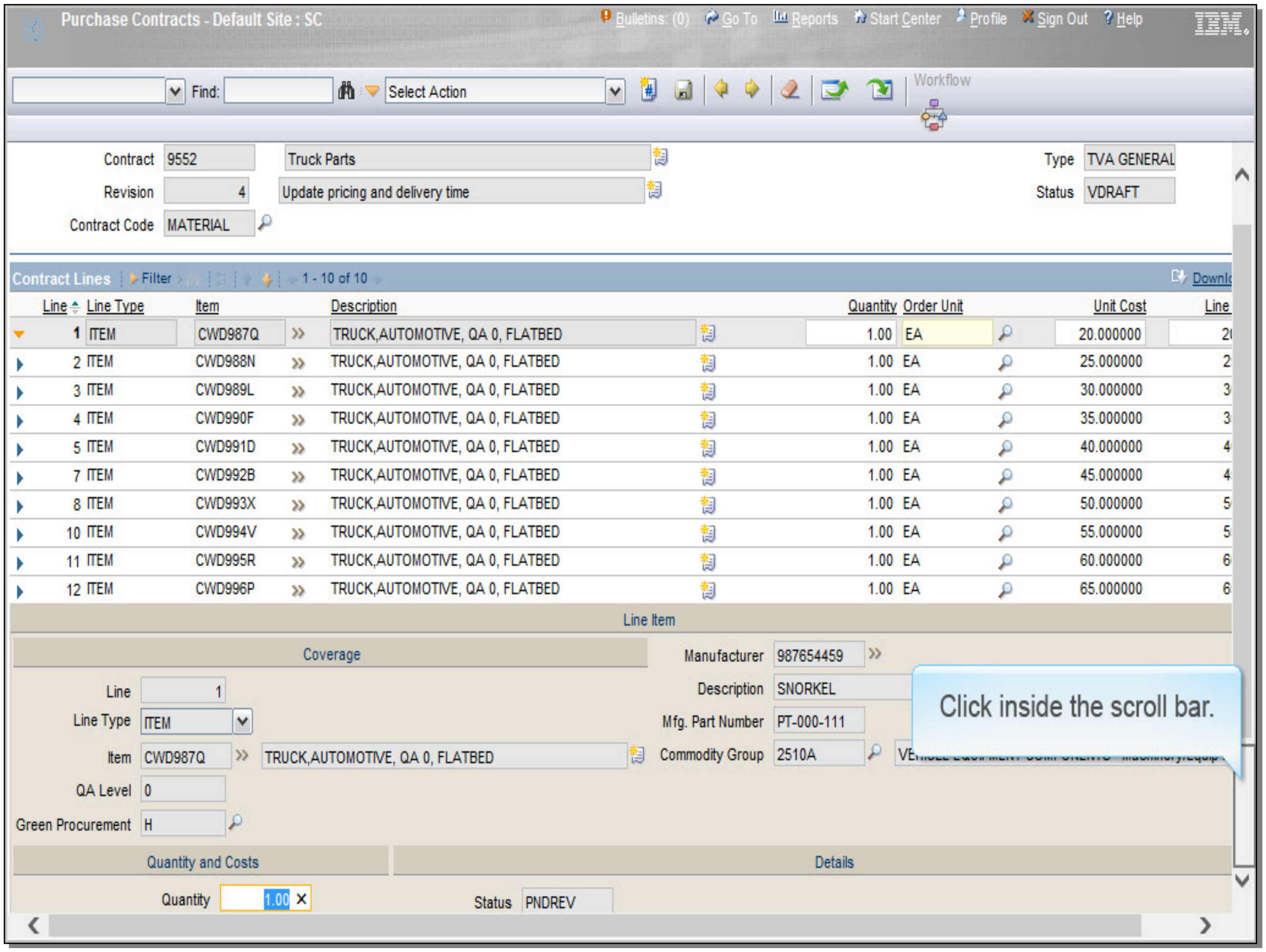
The status of the purchase contract has changed to VDRAFT and the lines in the contract can now be edited. Clicking the View Details icon to the left of a line displays the fields.

Let’s work with THIS item.

Text Captions

Click the **View Details** icon.

Slide 113 - Revising a Purchase Contract



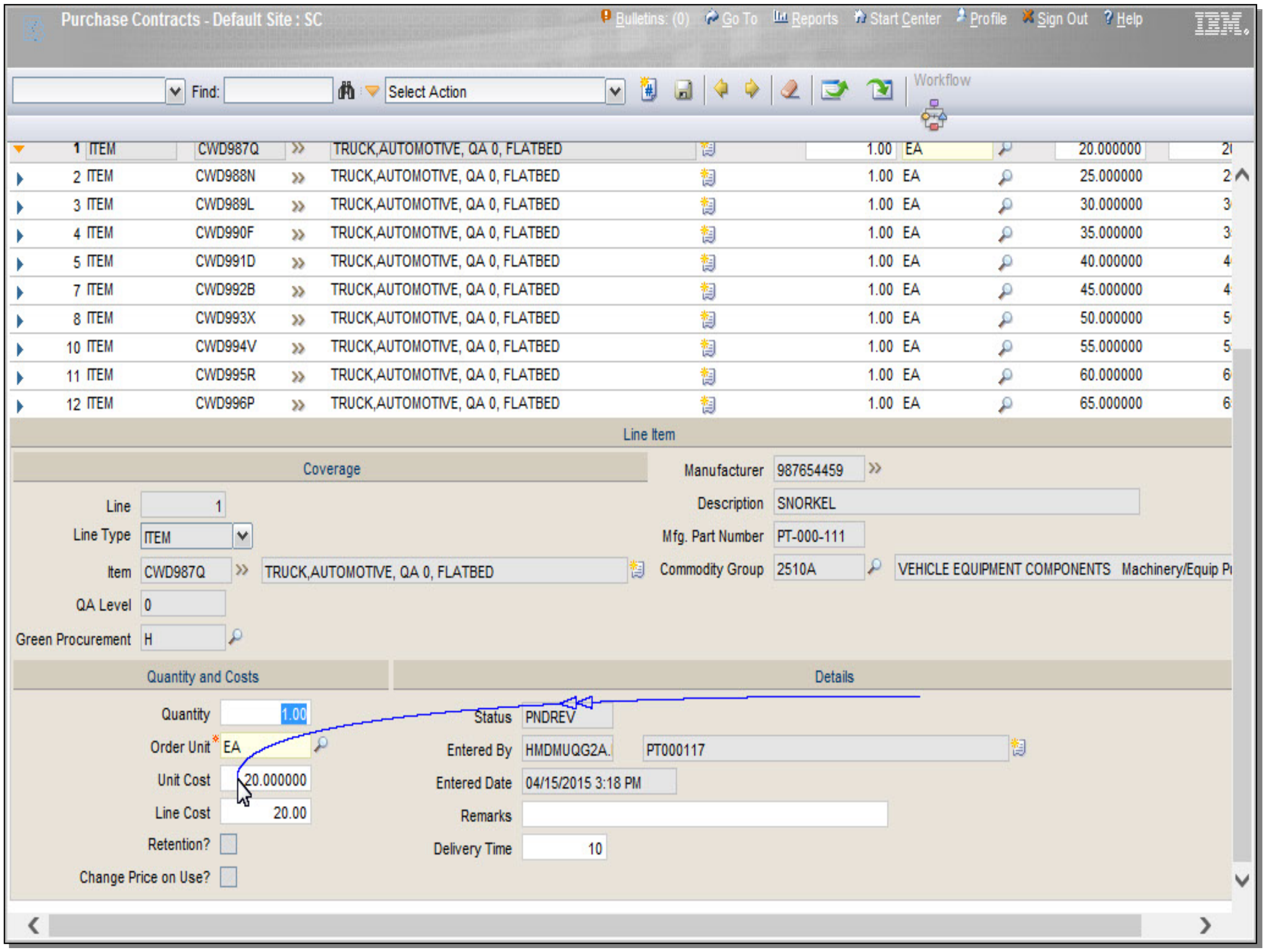
Slide notes

Now scroll down to view the rest of the fields.

Text Captions

Click inside the scroll bar.

Slide 114 - Revising a Purchase Contract

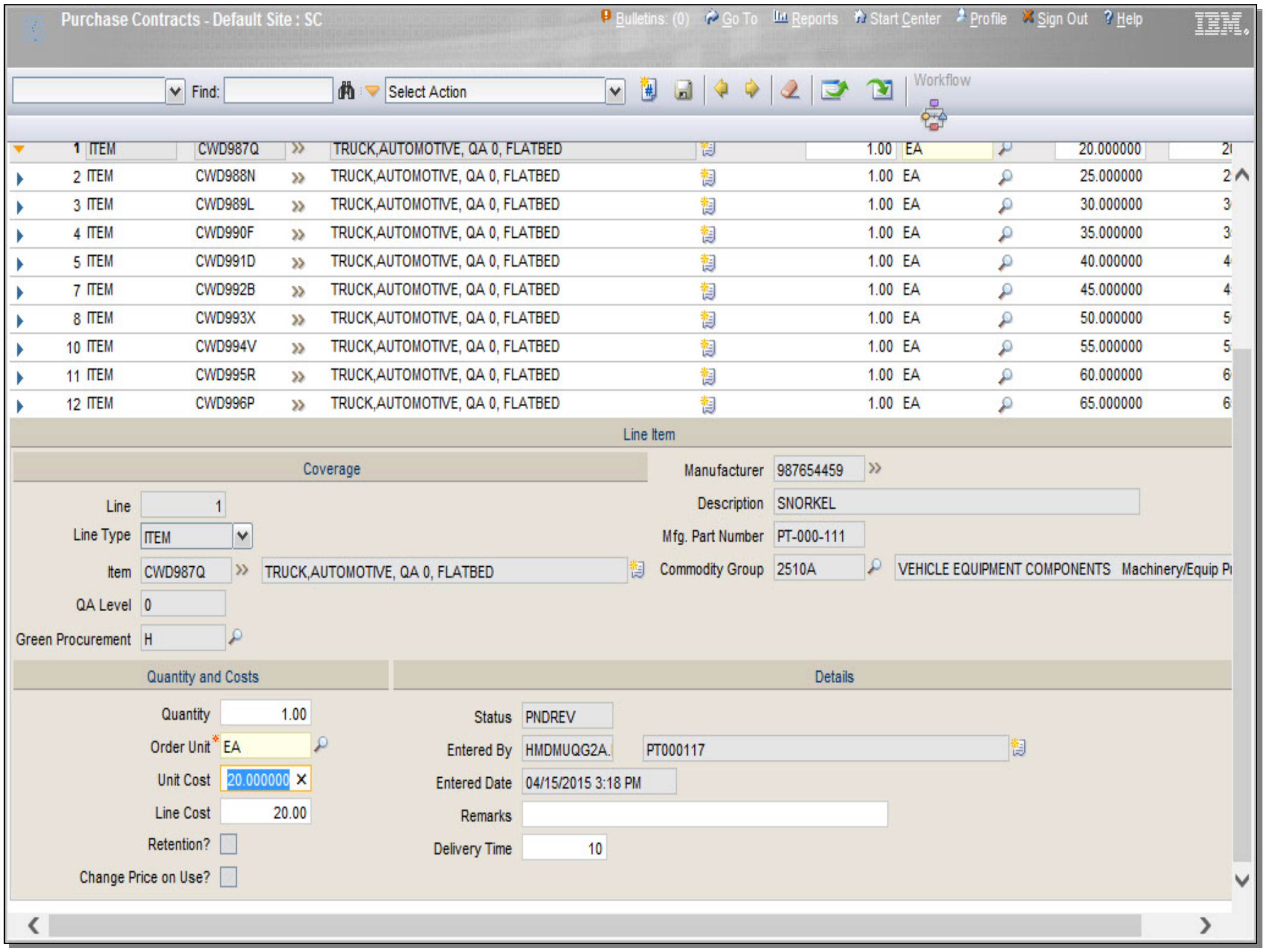


Slide notes

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

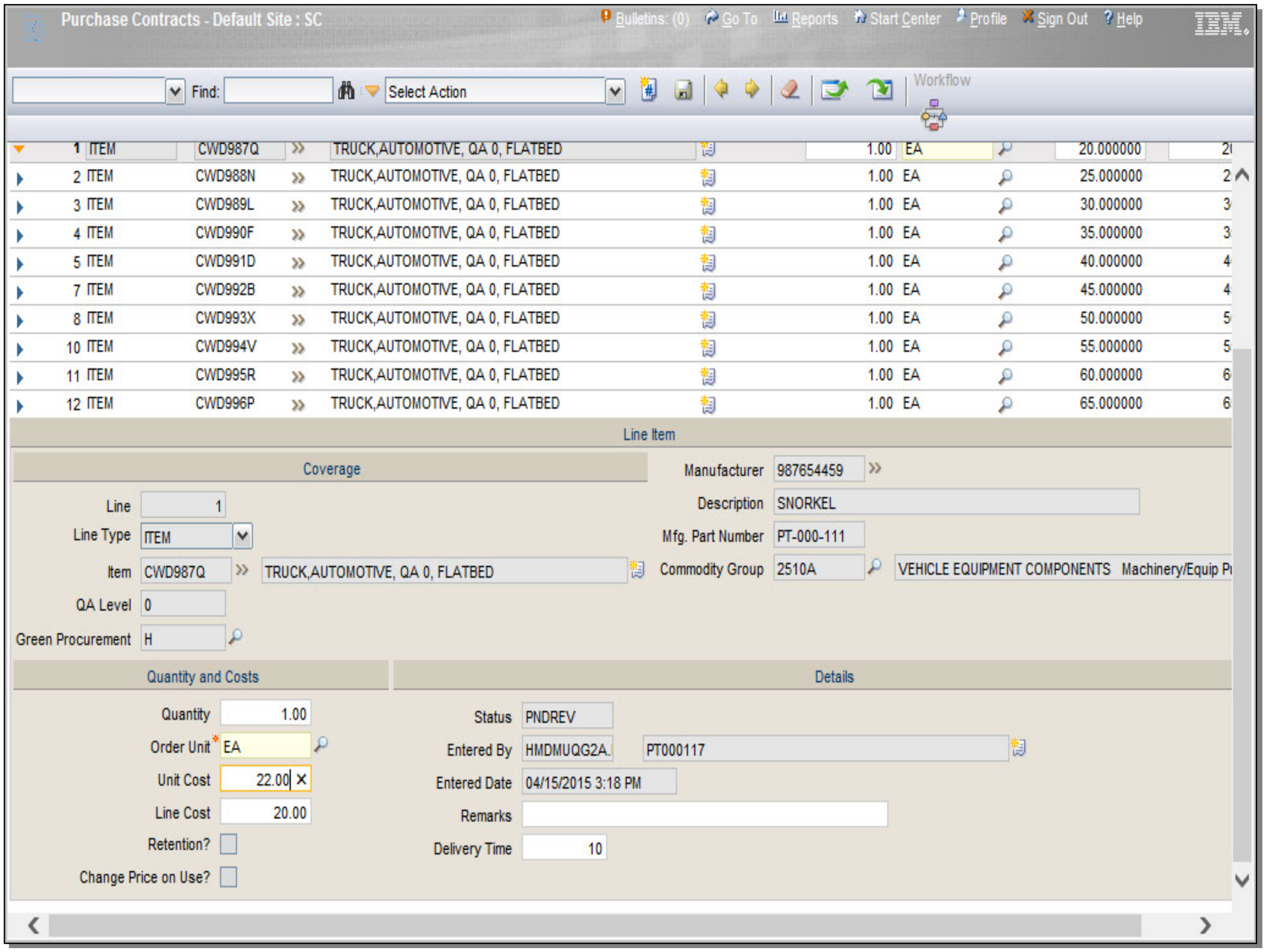
Slide 115 - Revising a Purchase Contract



Slide notes

Text Captions

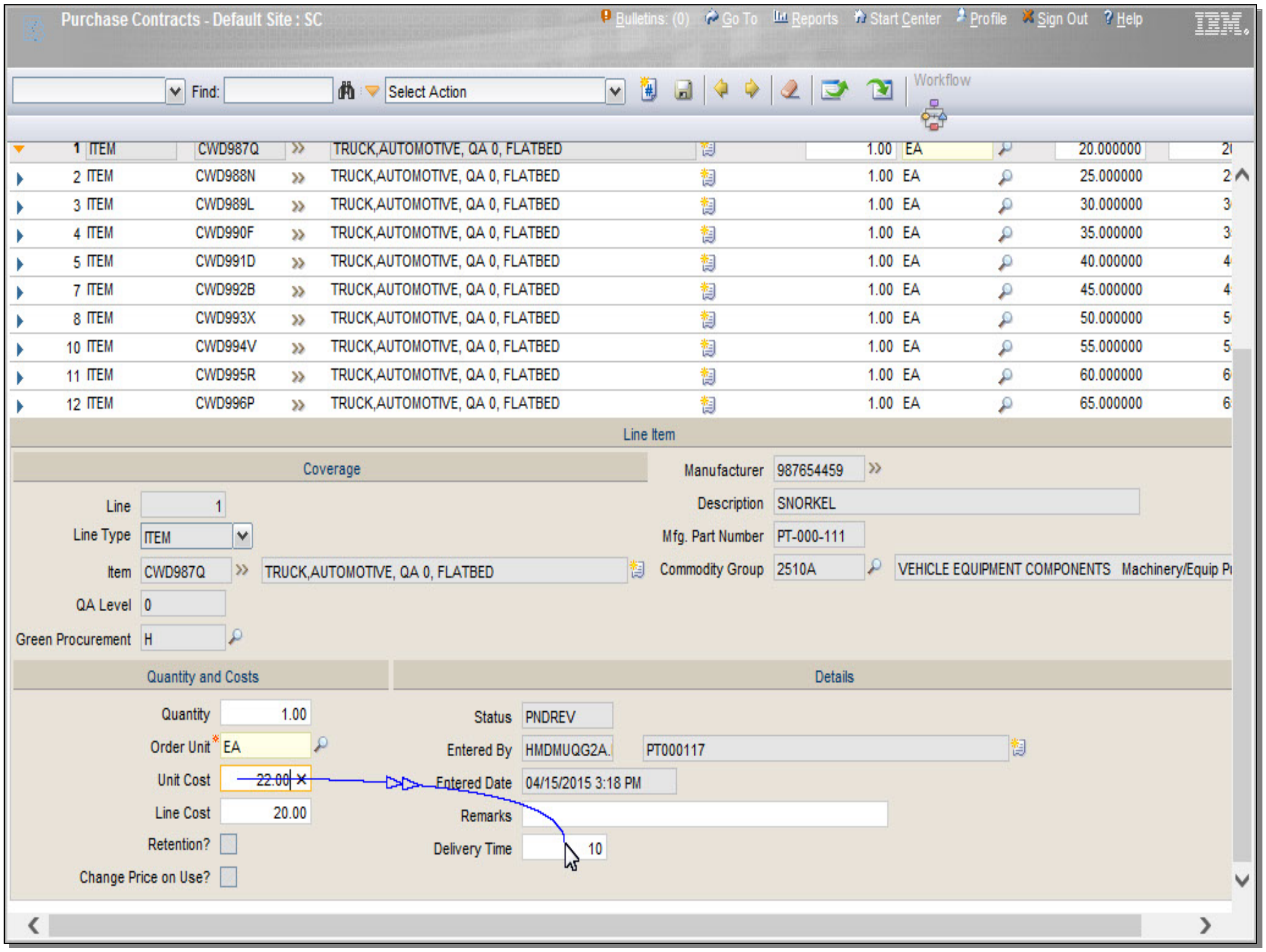
Slide 116 - Revising a Purchase Contract



Slide notes

Text Captions

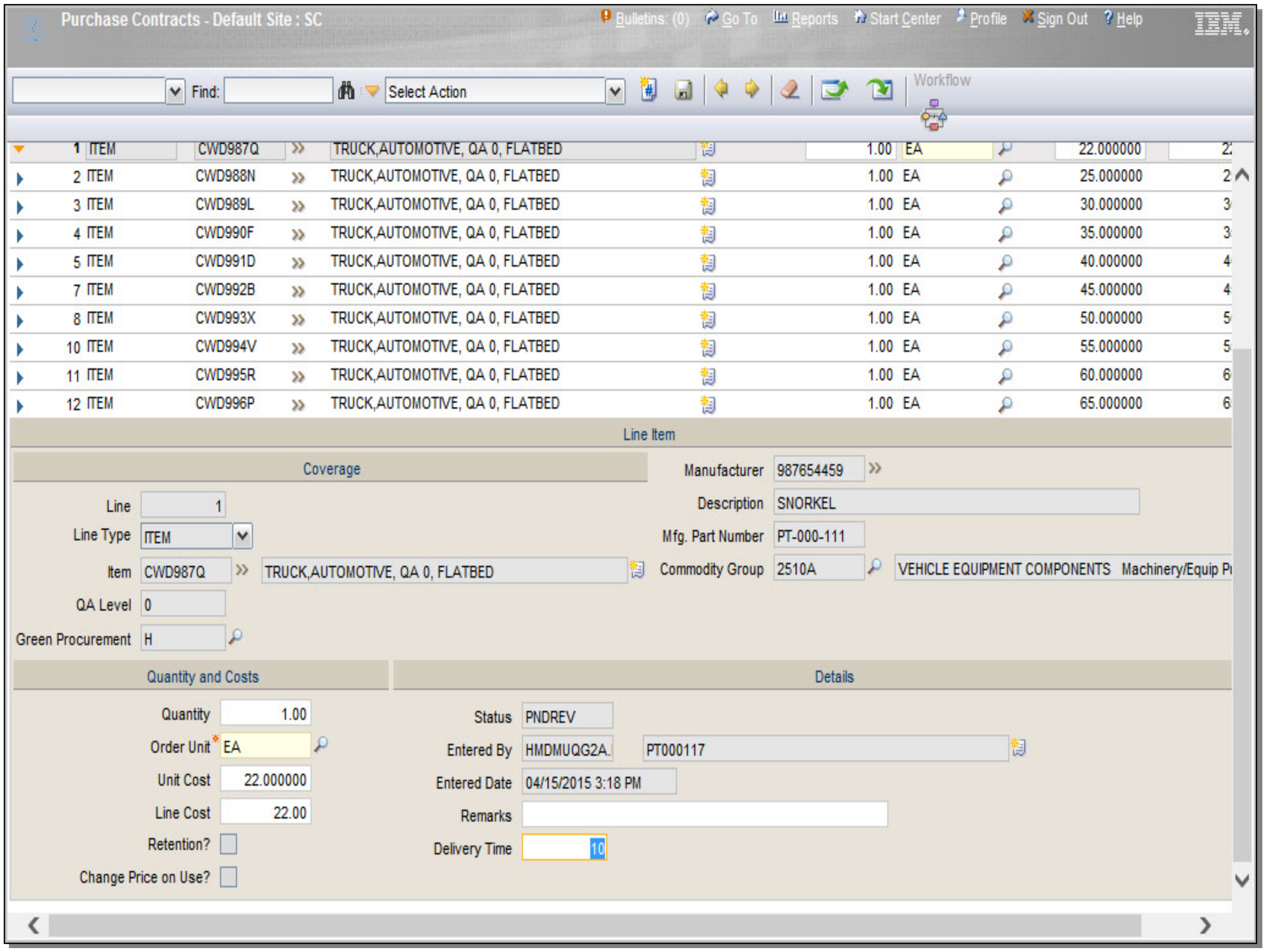
Slide 117 - Revising a Purchase Contract



Slide notes

Text Captions

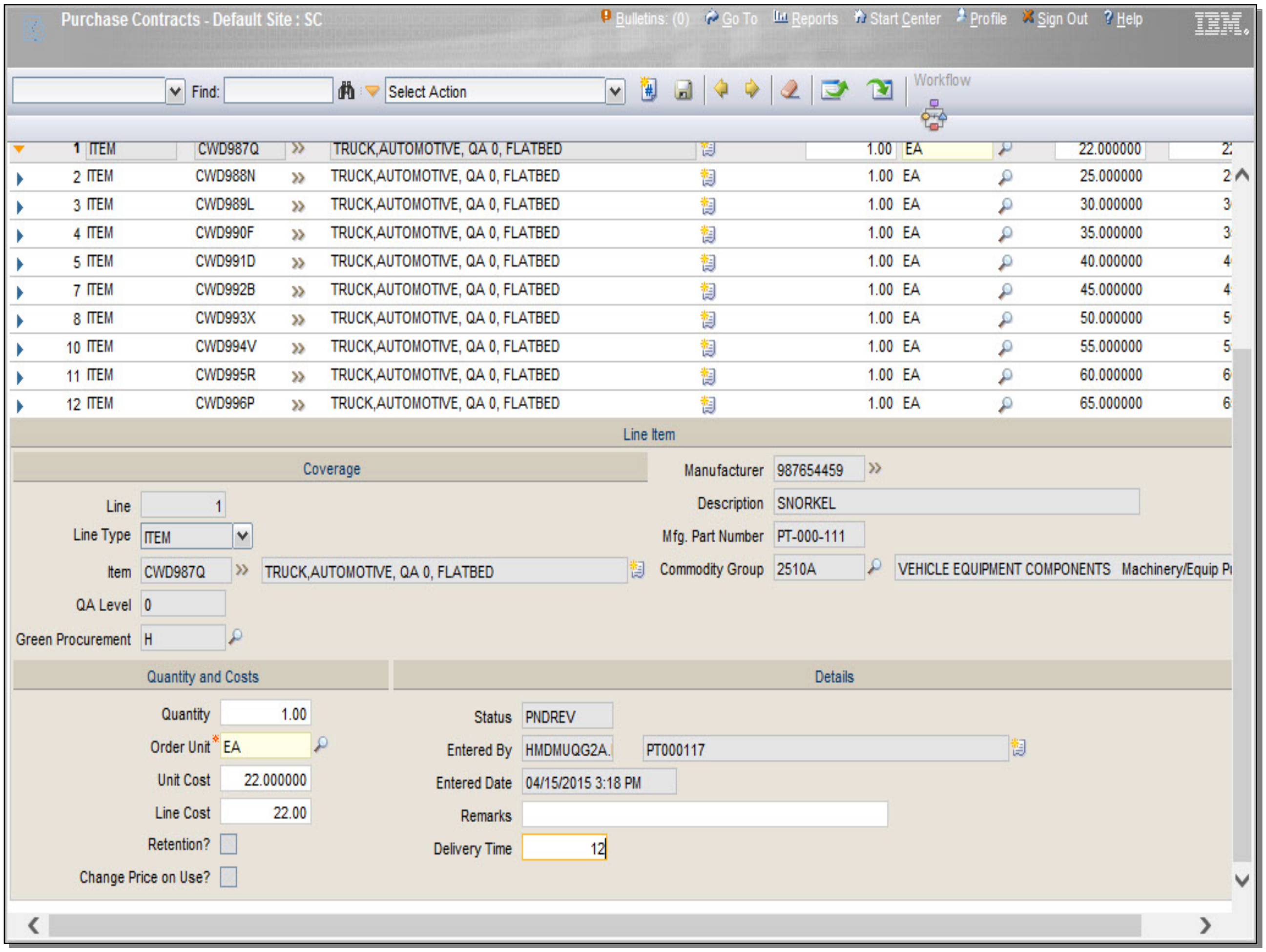
Slide 118 - Revising a Purchase Contract



Slide notes

Text Captions

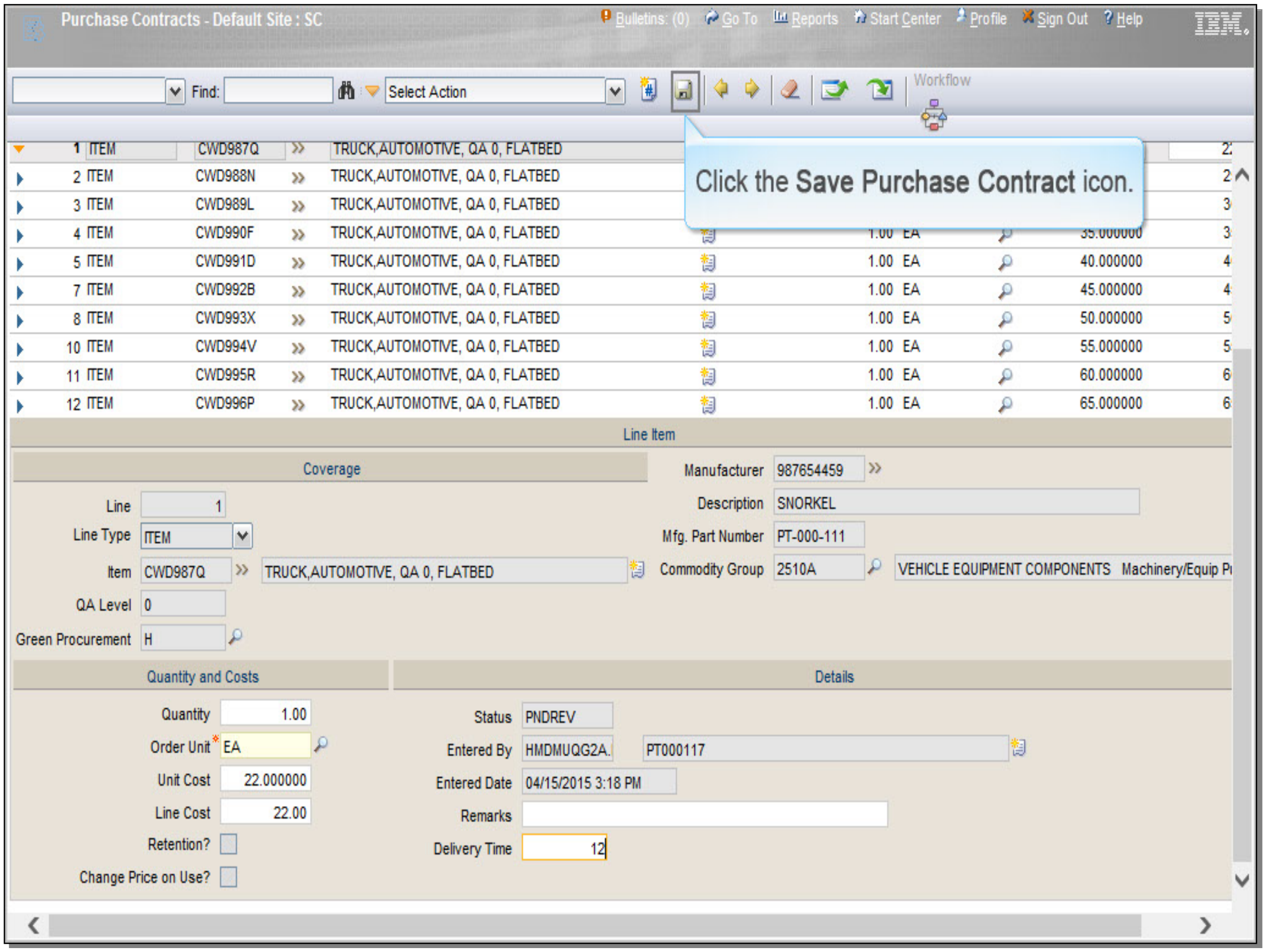
Slide 119 - Revising a Purchase Contract



Slide notes

Text Captions

Slide 120 - Revising a Purchase Contract



Slide notes

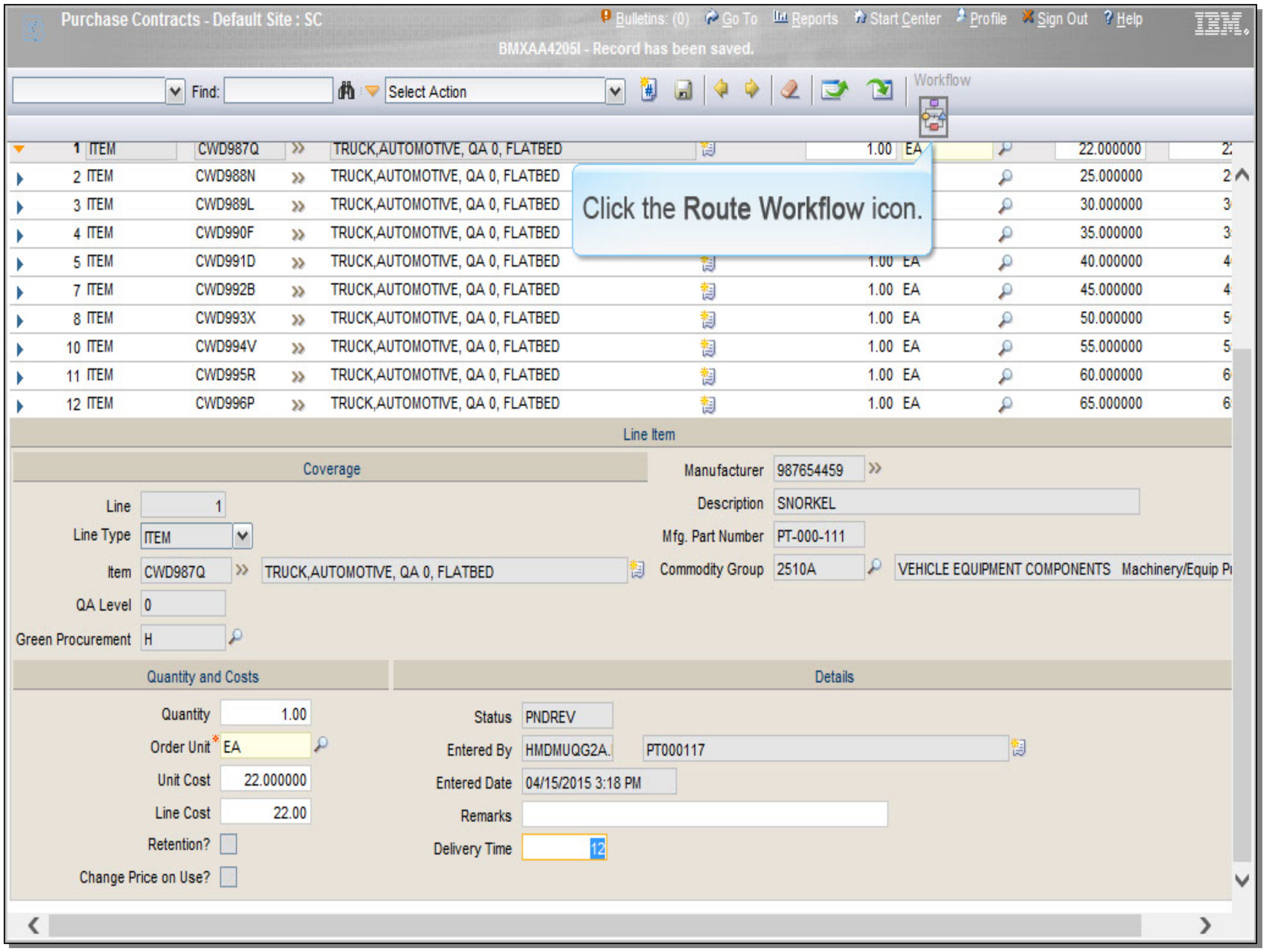
If any other lines need to be revised, you repeat this process. For this example, just this item needs updating.

The next step is to save the purchase contract record.

Text Captions

Click the **Save Purchase Contract** icon.

Slide 121 - Revising a Purchase Contract



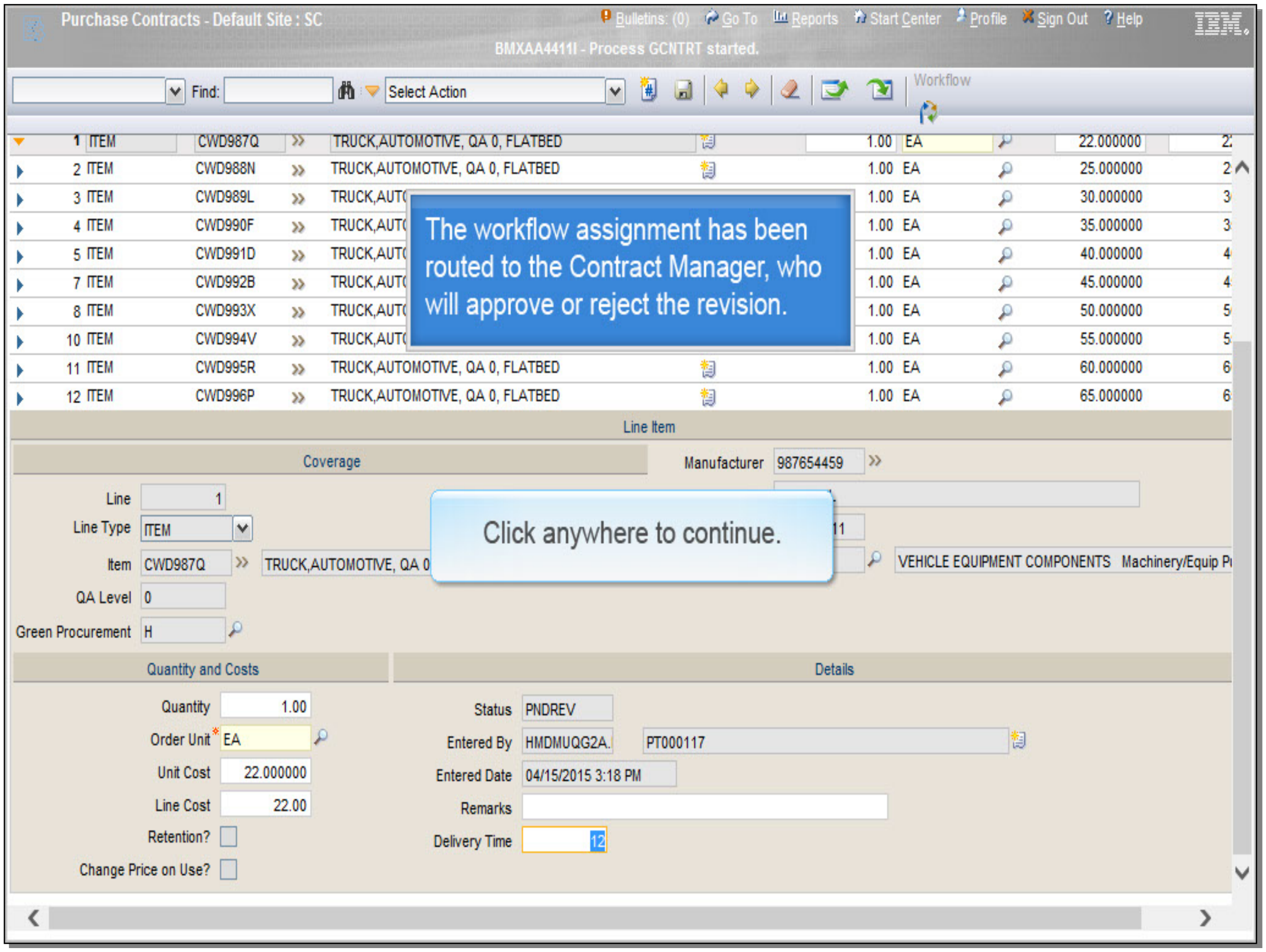
Slide notes

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

Text Captions

Click the **Route Workflow** icon.

Slide 122 - Revising a Purchase Contract



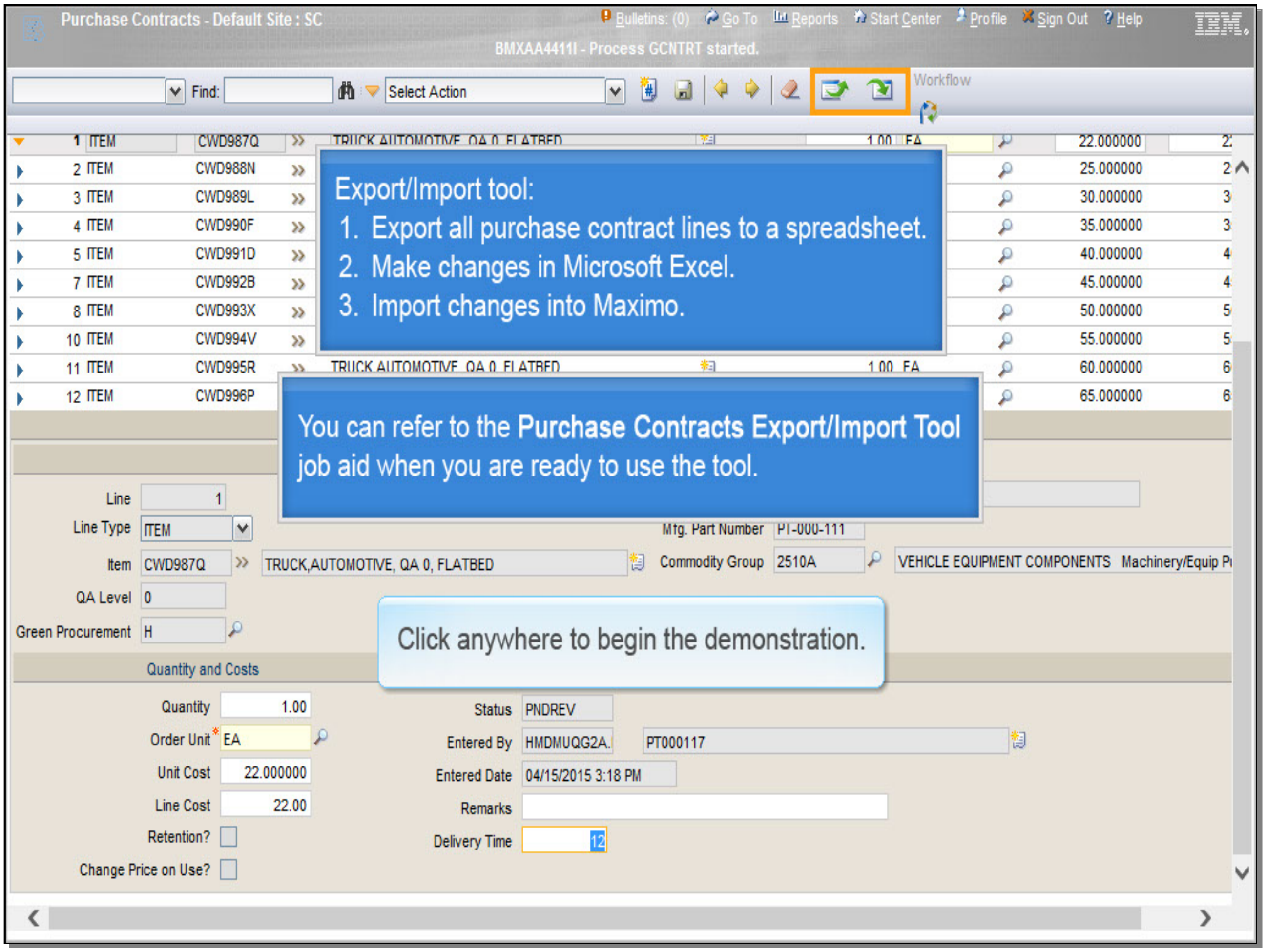
Slide notes

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.

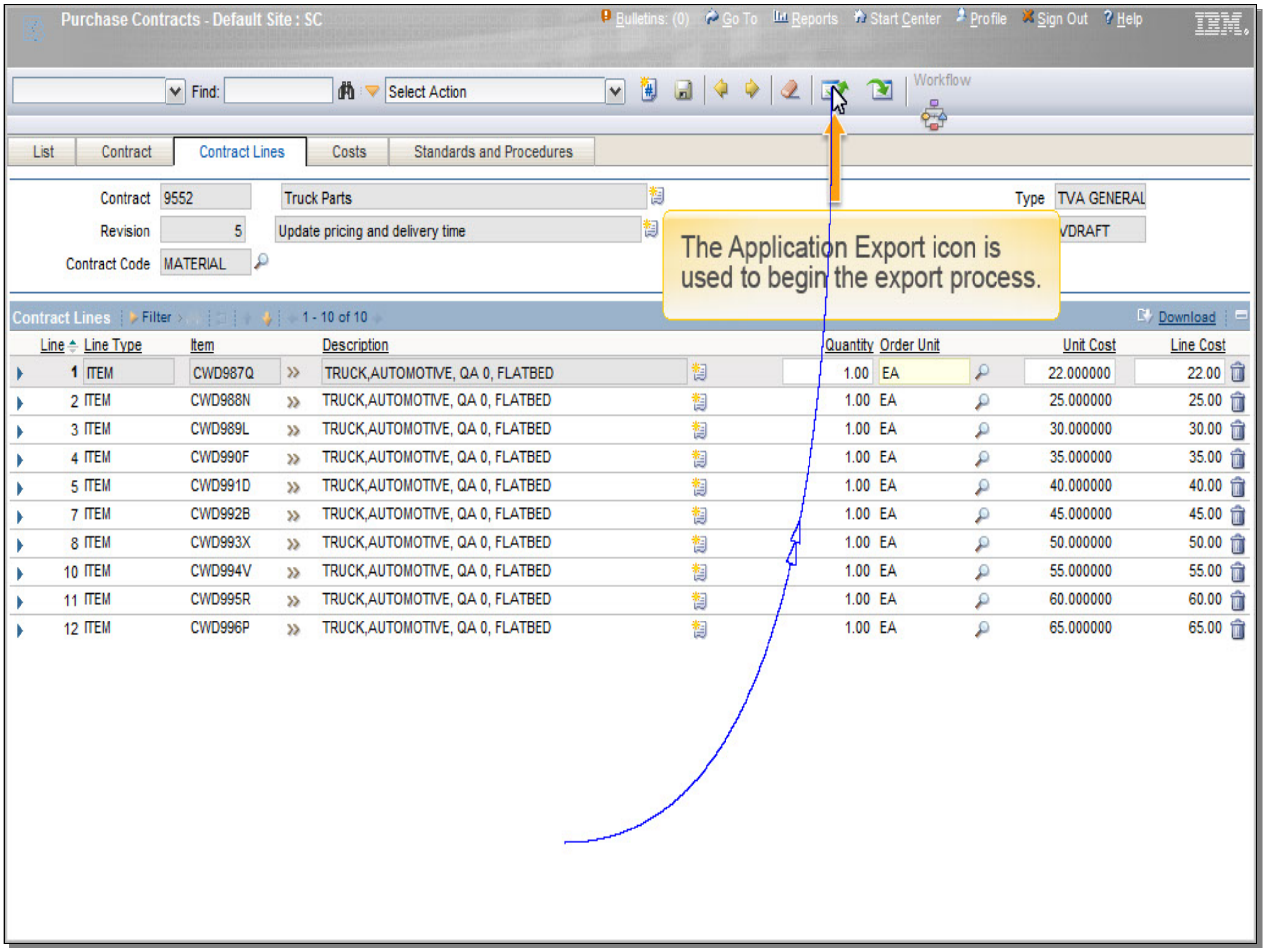
Although not difficult, this process consists of many steps. We won't step through the process as we have in other topics, but will present a demonstration instead. Each step is documented in the related job aid, which is available on the Supplier portal. You can refer to this job aid when you are ready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

Click anywhere on the screen to begin the demonstration.

Text Captions

Click anywhere to begin the demonstration.

Slide 124 - Demonstration

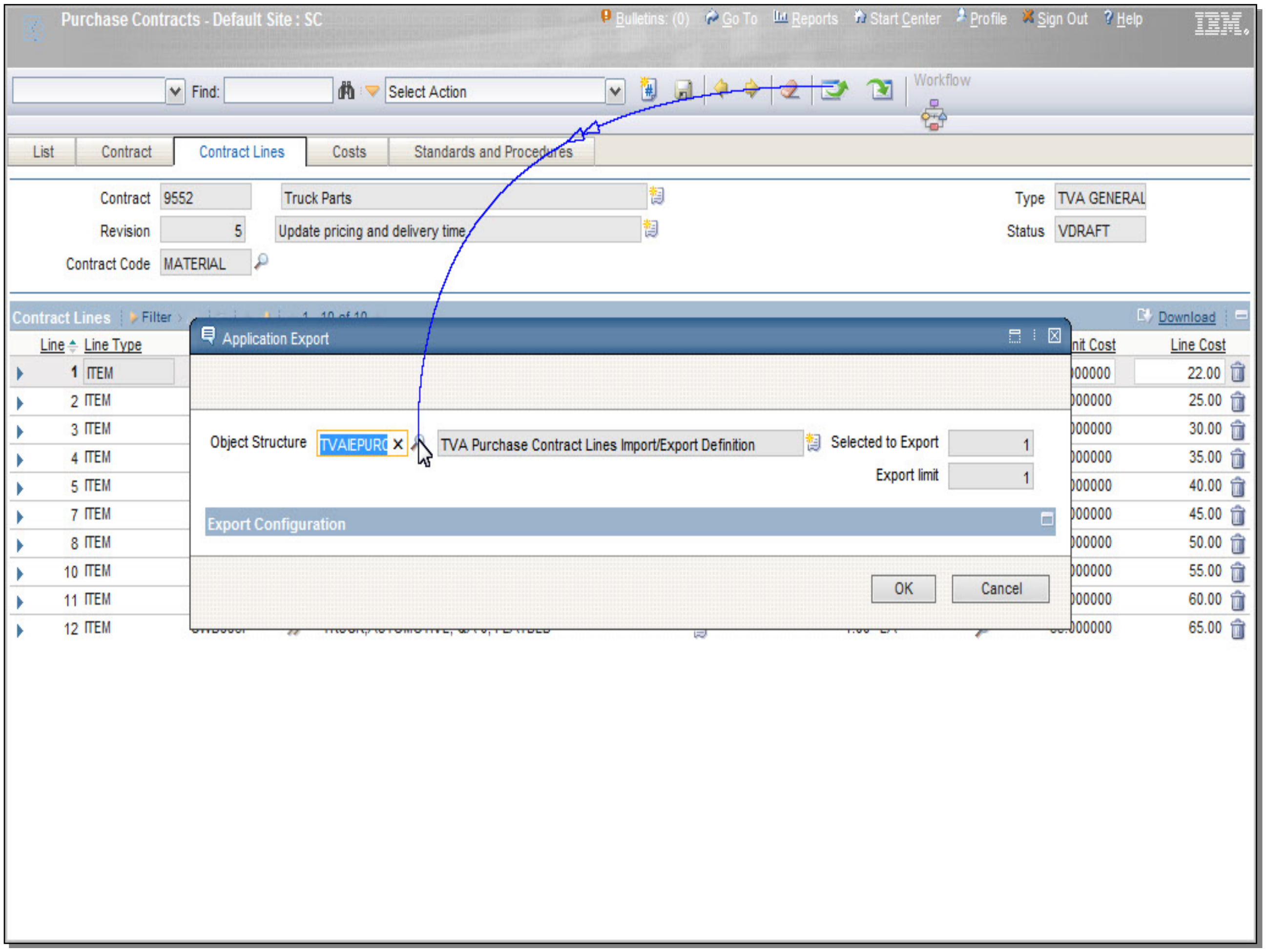


Slide notes

Text Captions

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

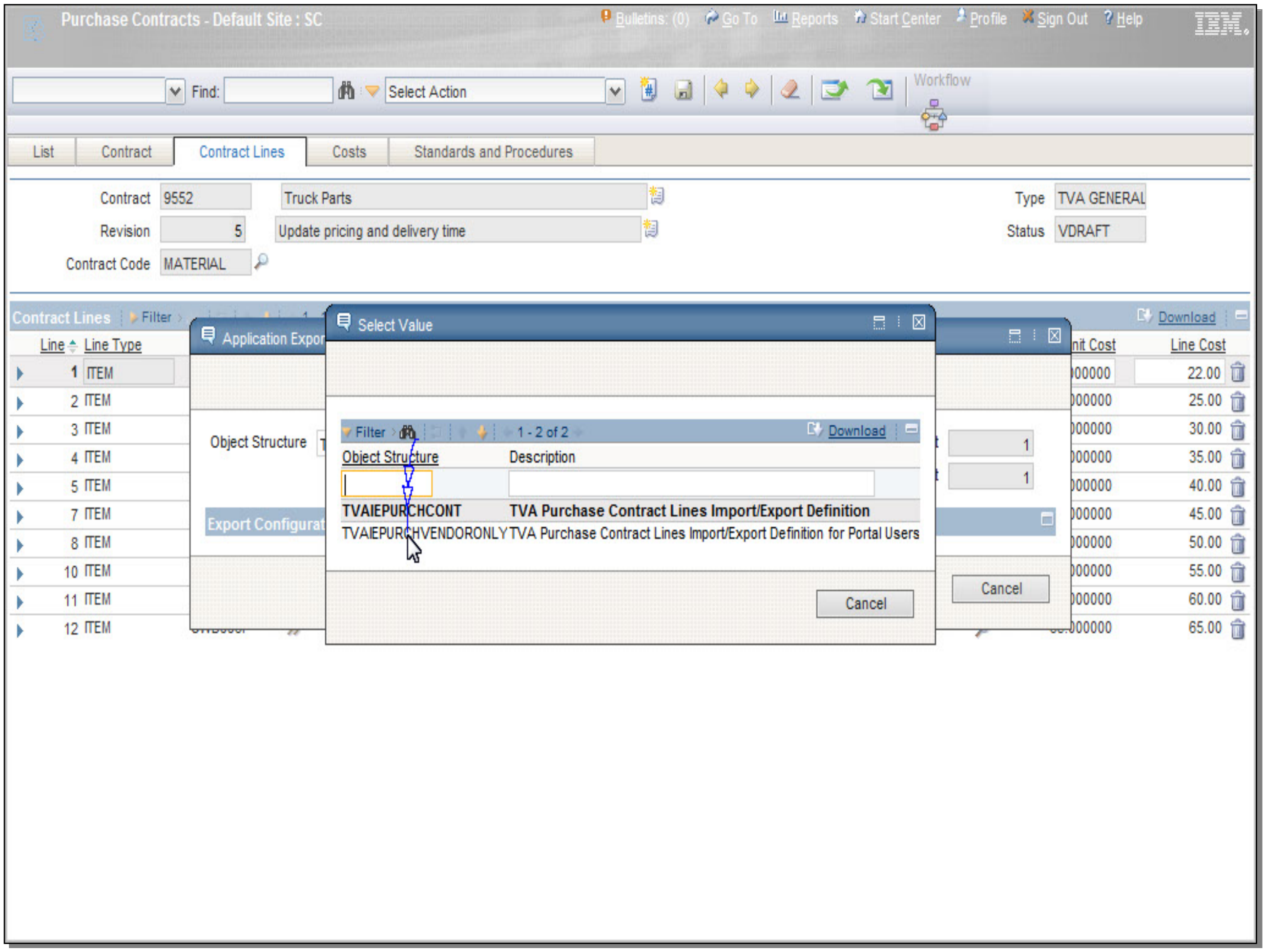
Slide 125 - Demo



Slide notes

Text Captions

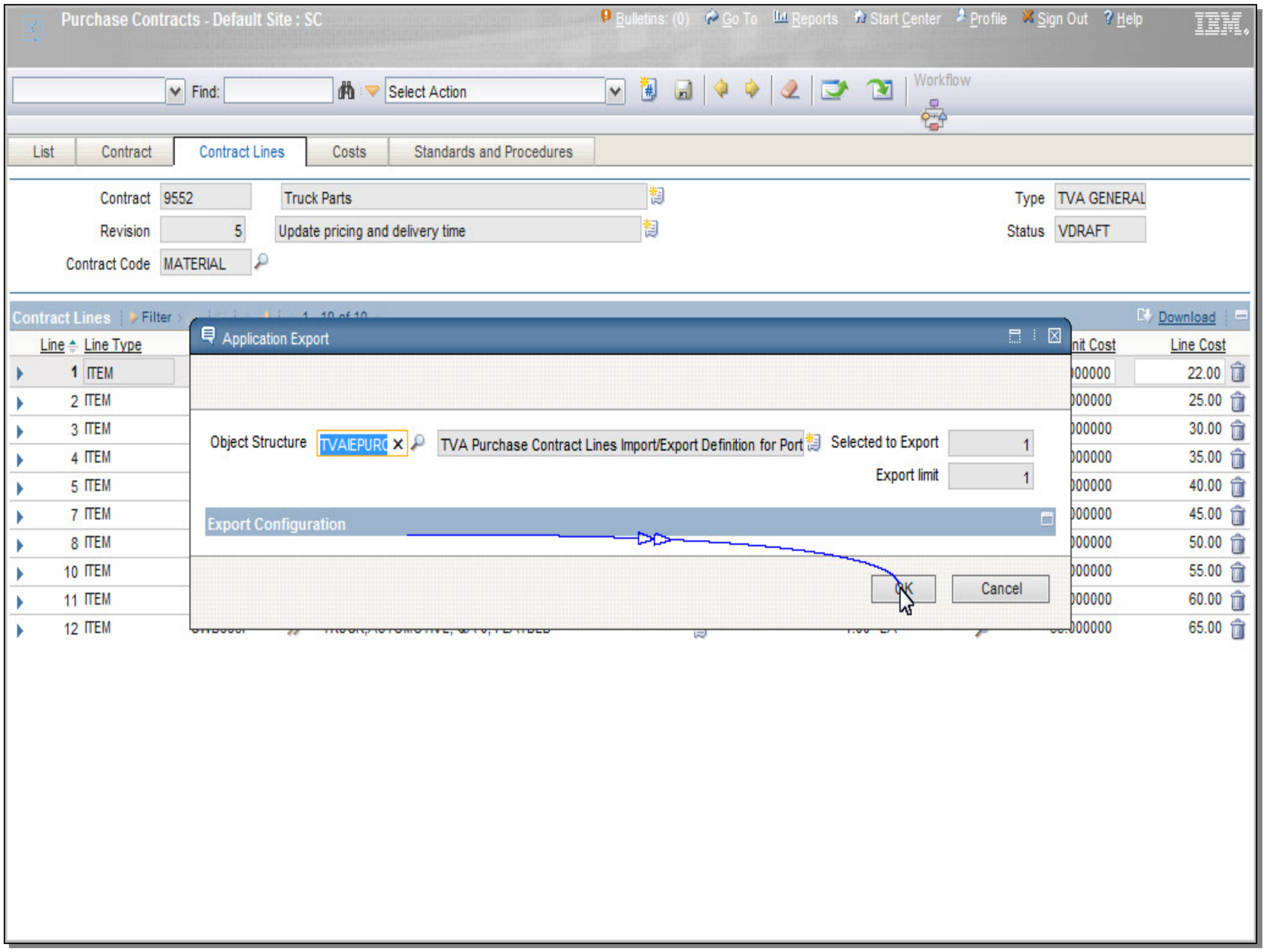
Slide 126 - Demo



Slide notes

Text Captions

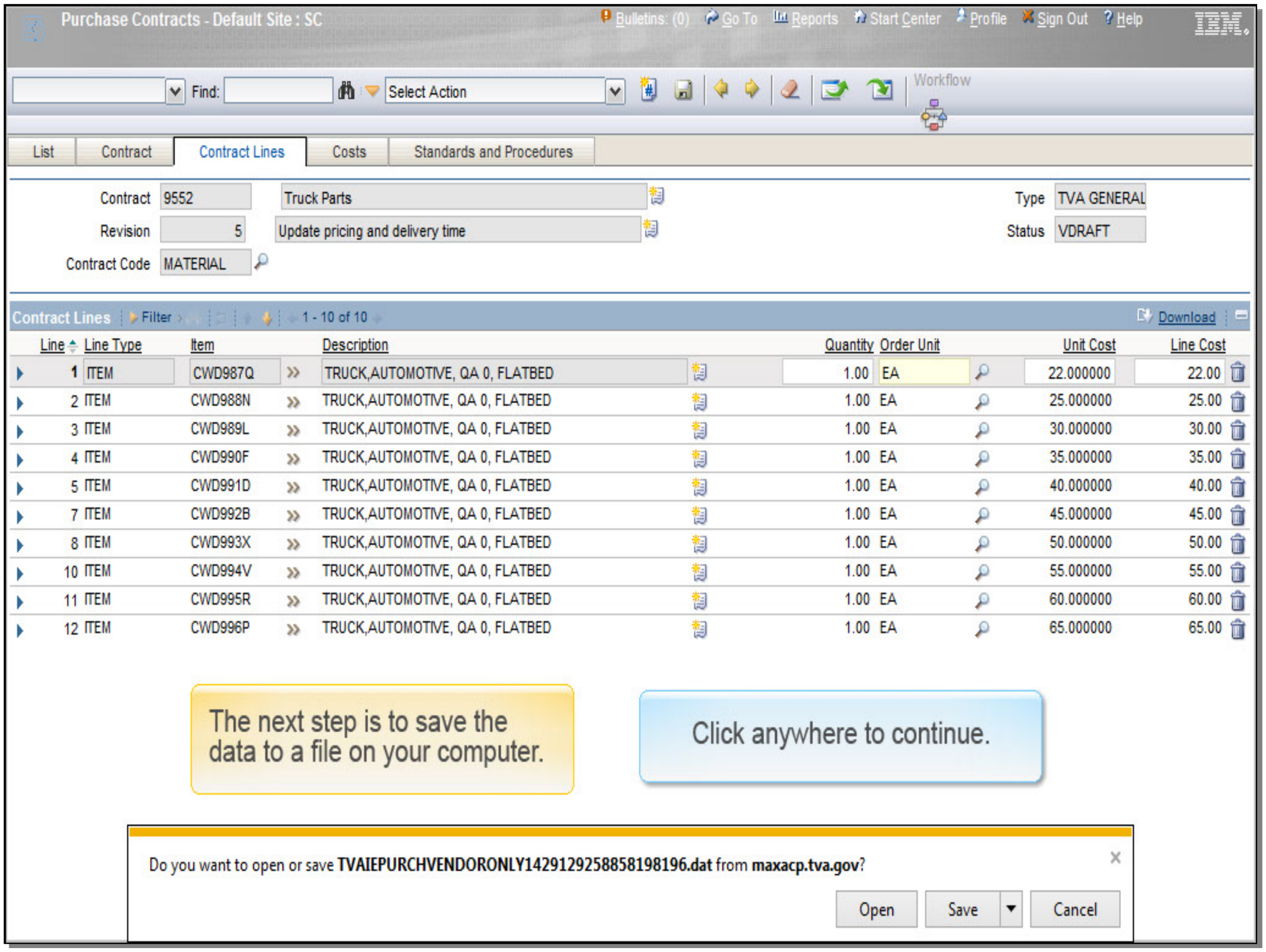
Slide 127 - Demo



Slide notes

Text Captions

Slide 128 - Demo



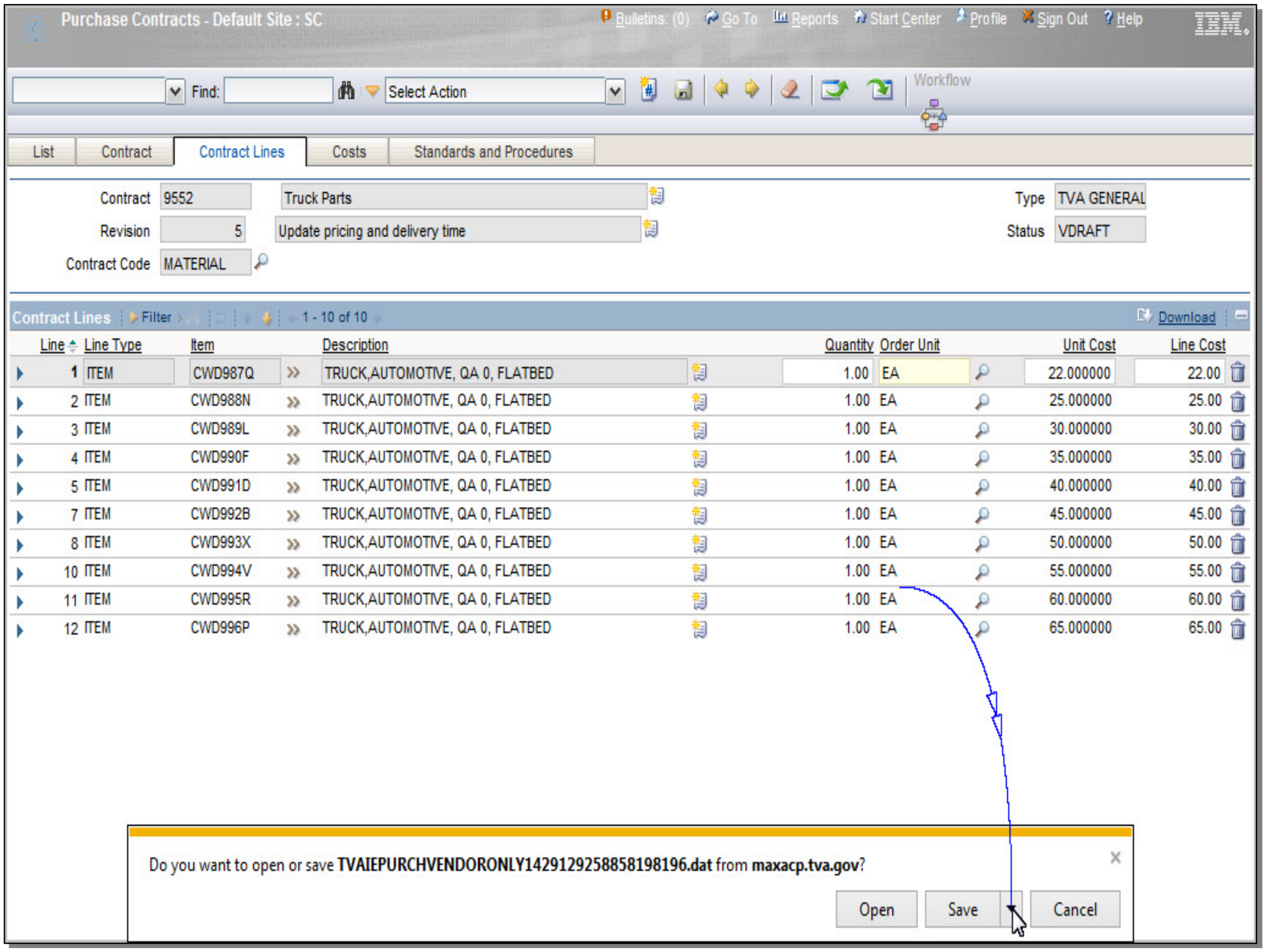
Slide notes

Text Captions

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

Click anywhere to continue.

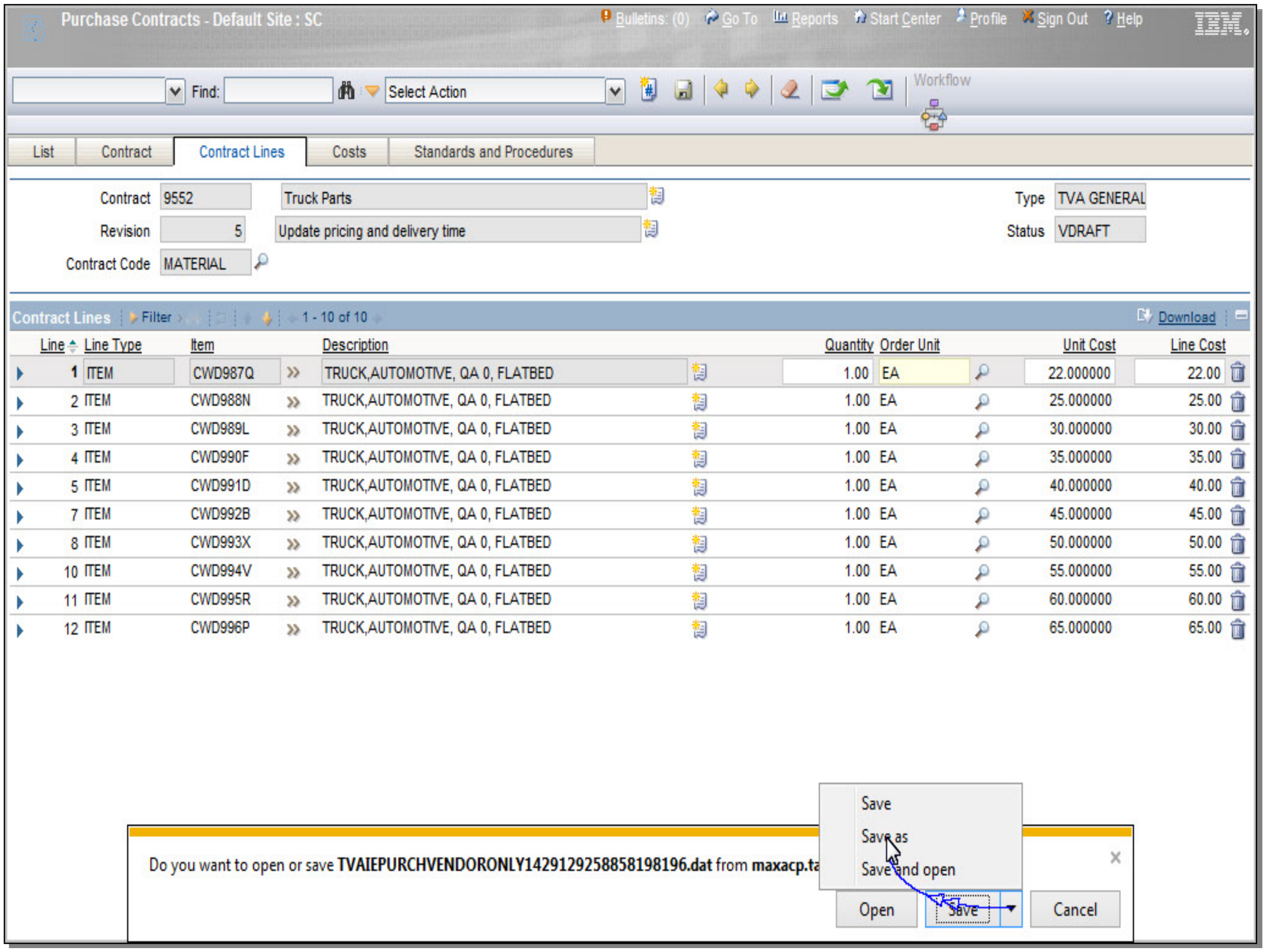
Slide 129 - Demo



Slide notes

Text Captions

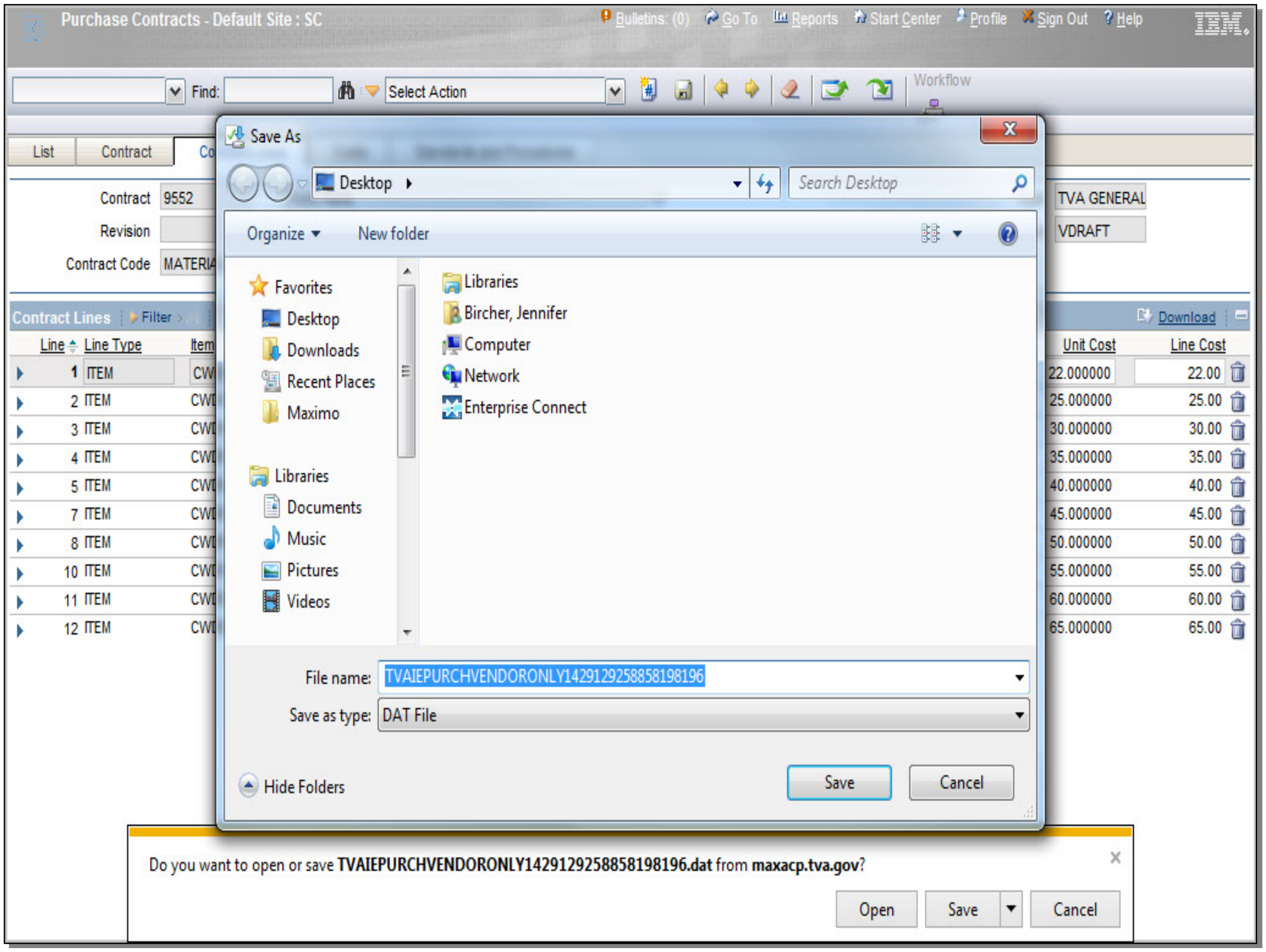
Slide 130 - Demo



Slide notes

Text Captions

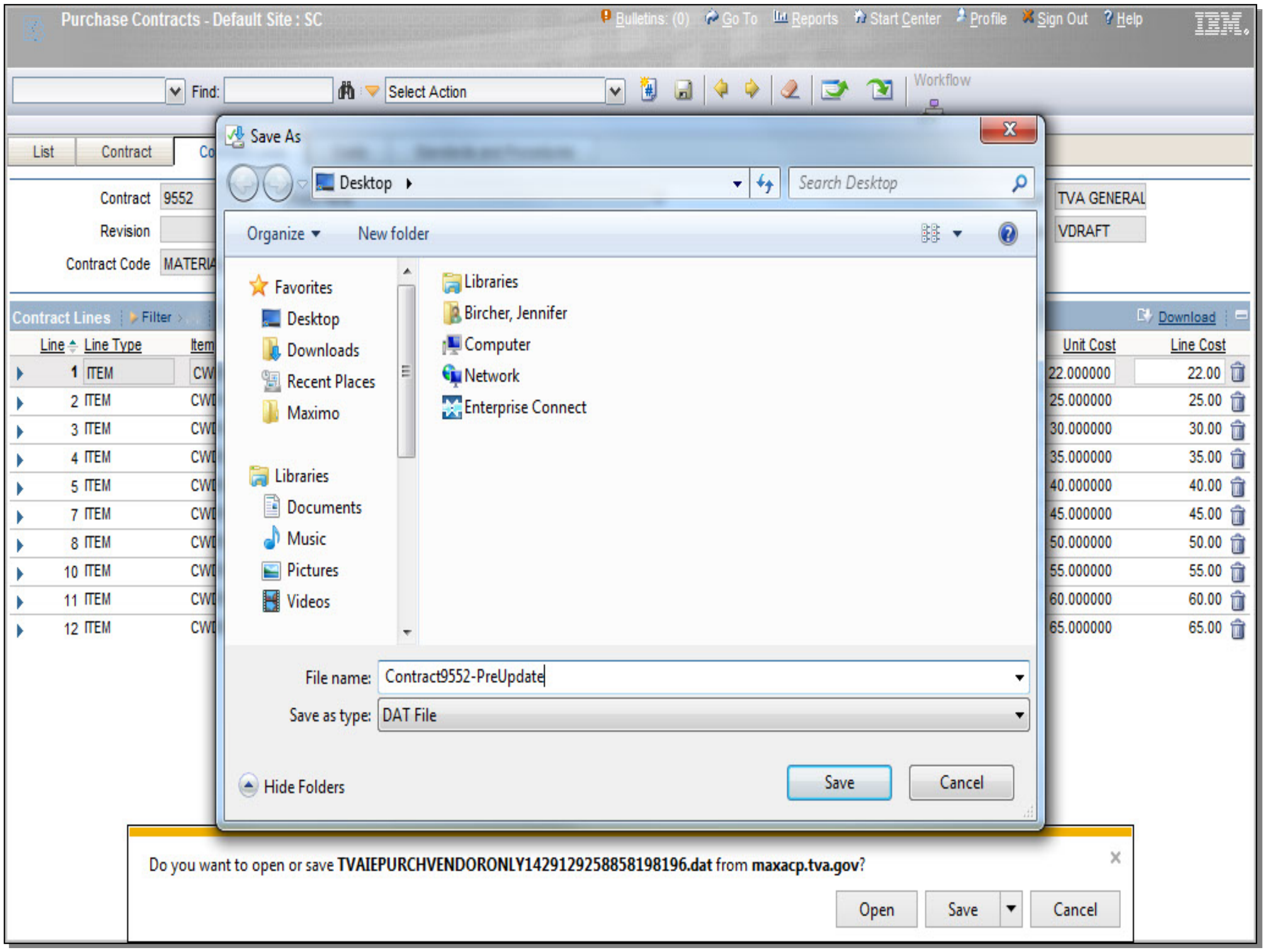
Slide 131 - Demo



Slide notes

Text Captions

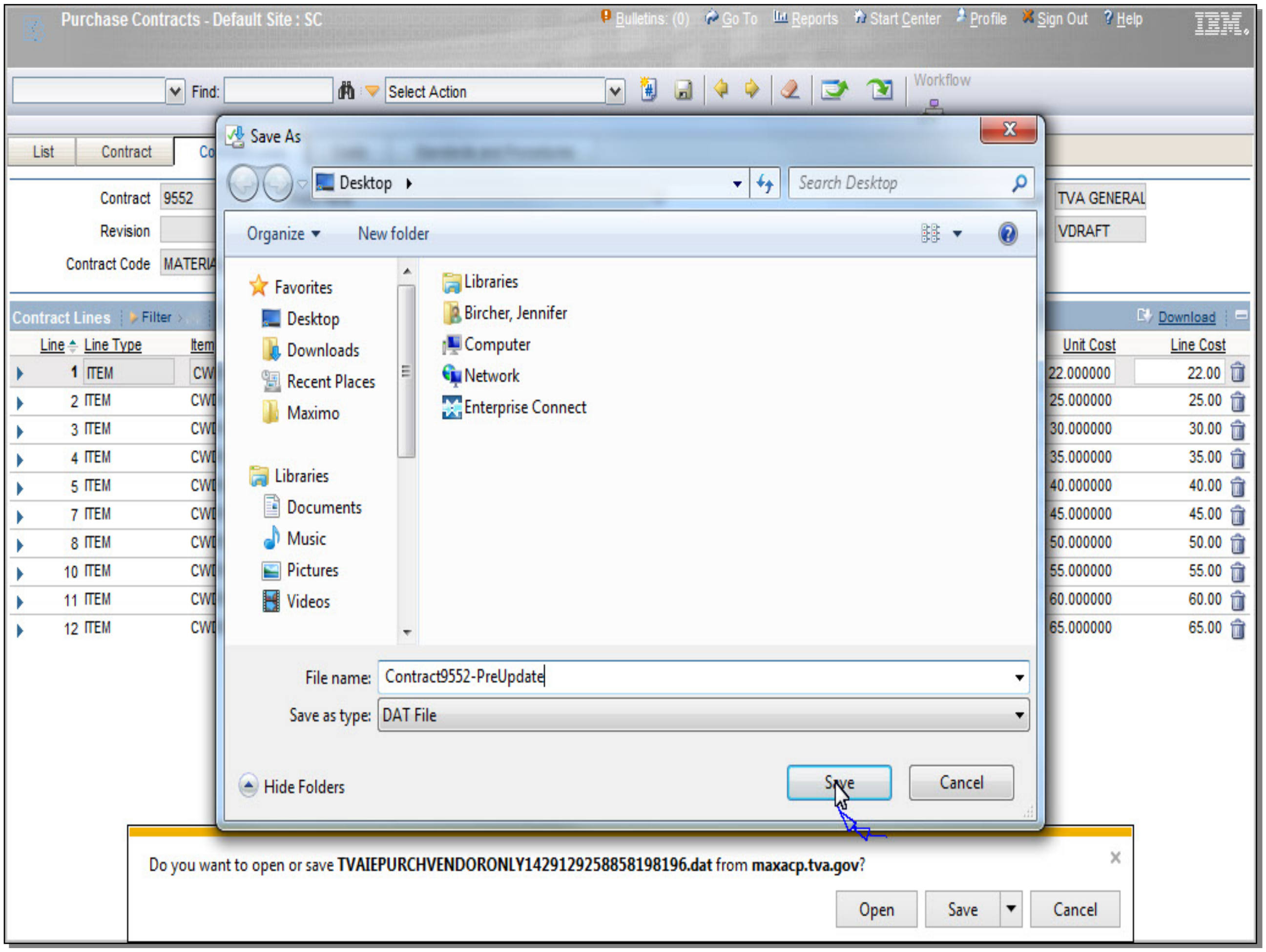
Slide 132 - Demo



Slide notes

Text Captions

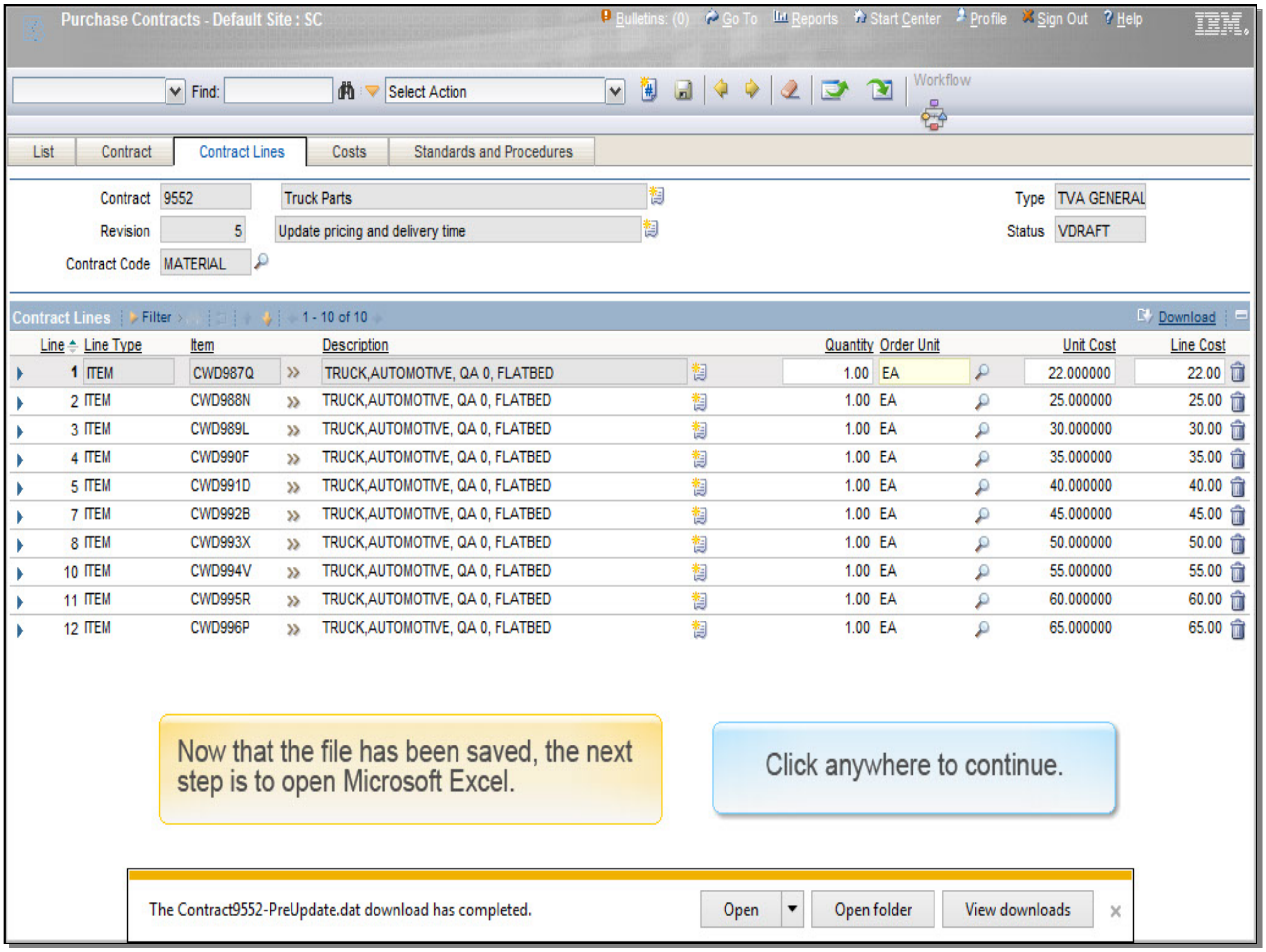
Slide 133 - Demo



Slide notes

Text Captions

Slide 134 - Demo



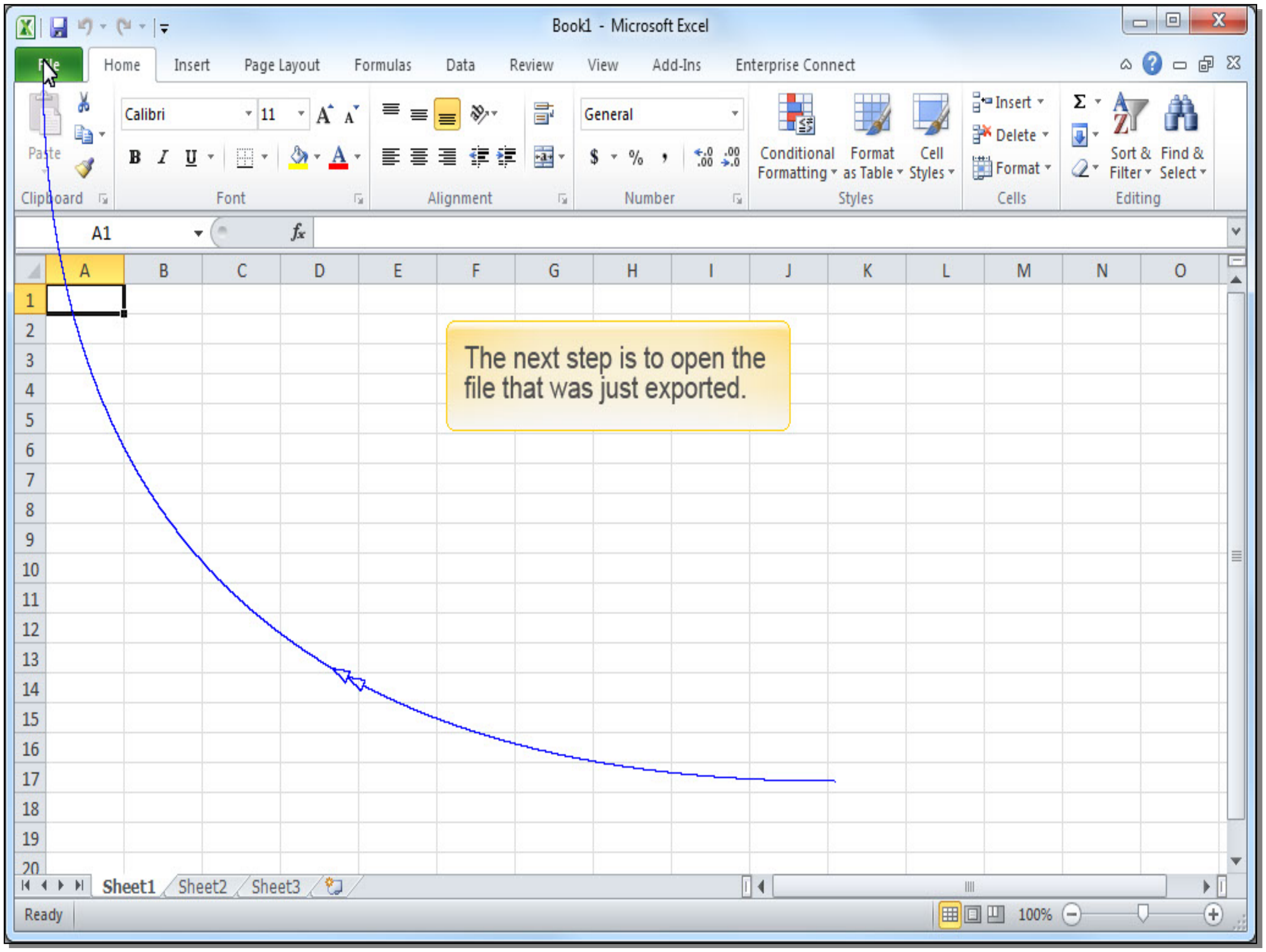
Slide notes

Text Captions

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

Click anywhere to continue.

Slide 135 - Demo

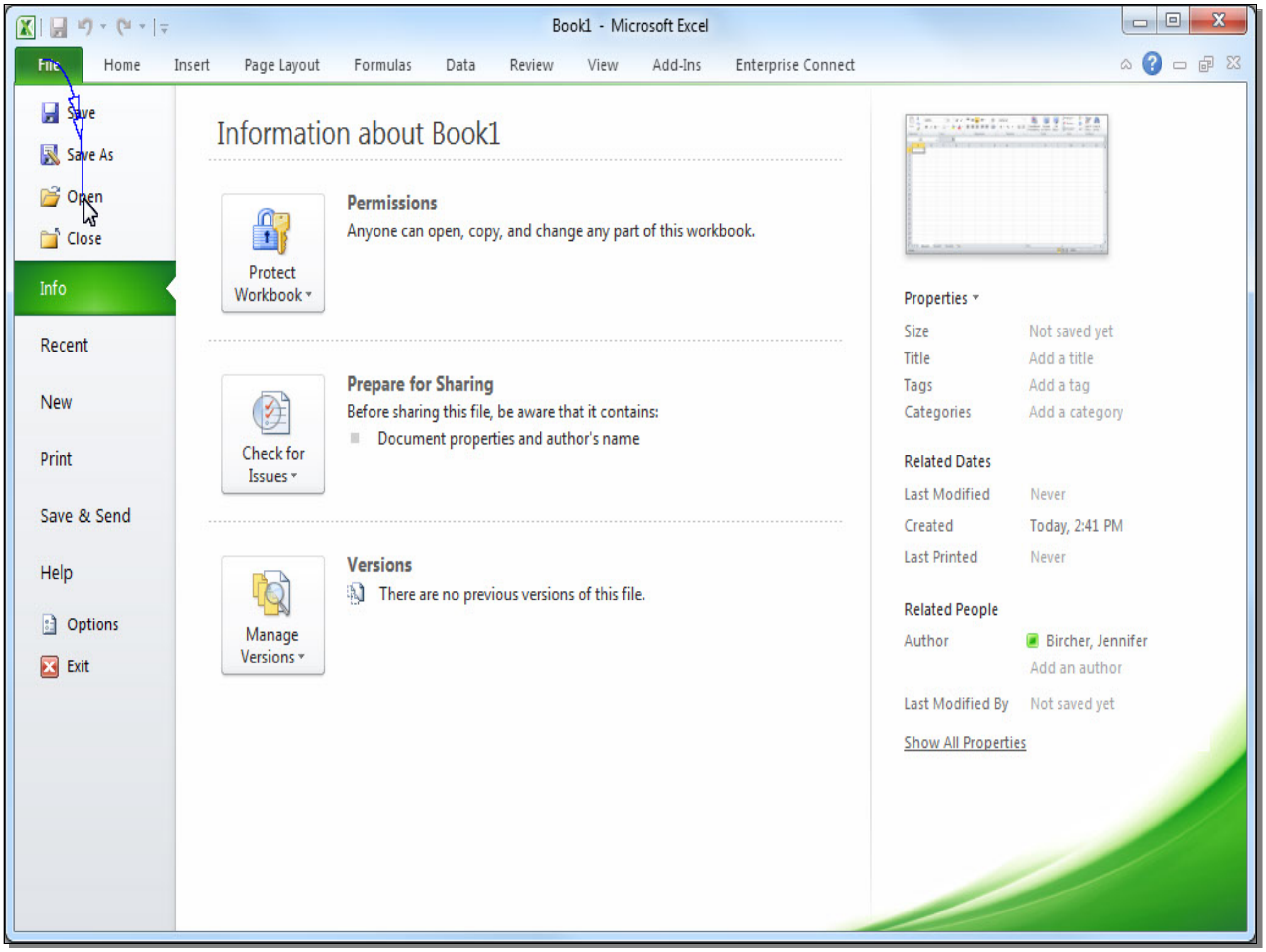


Slide notes

Text Captions

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

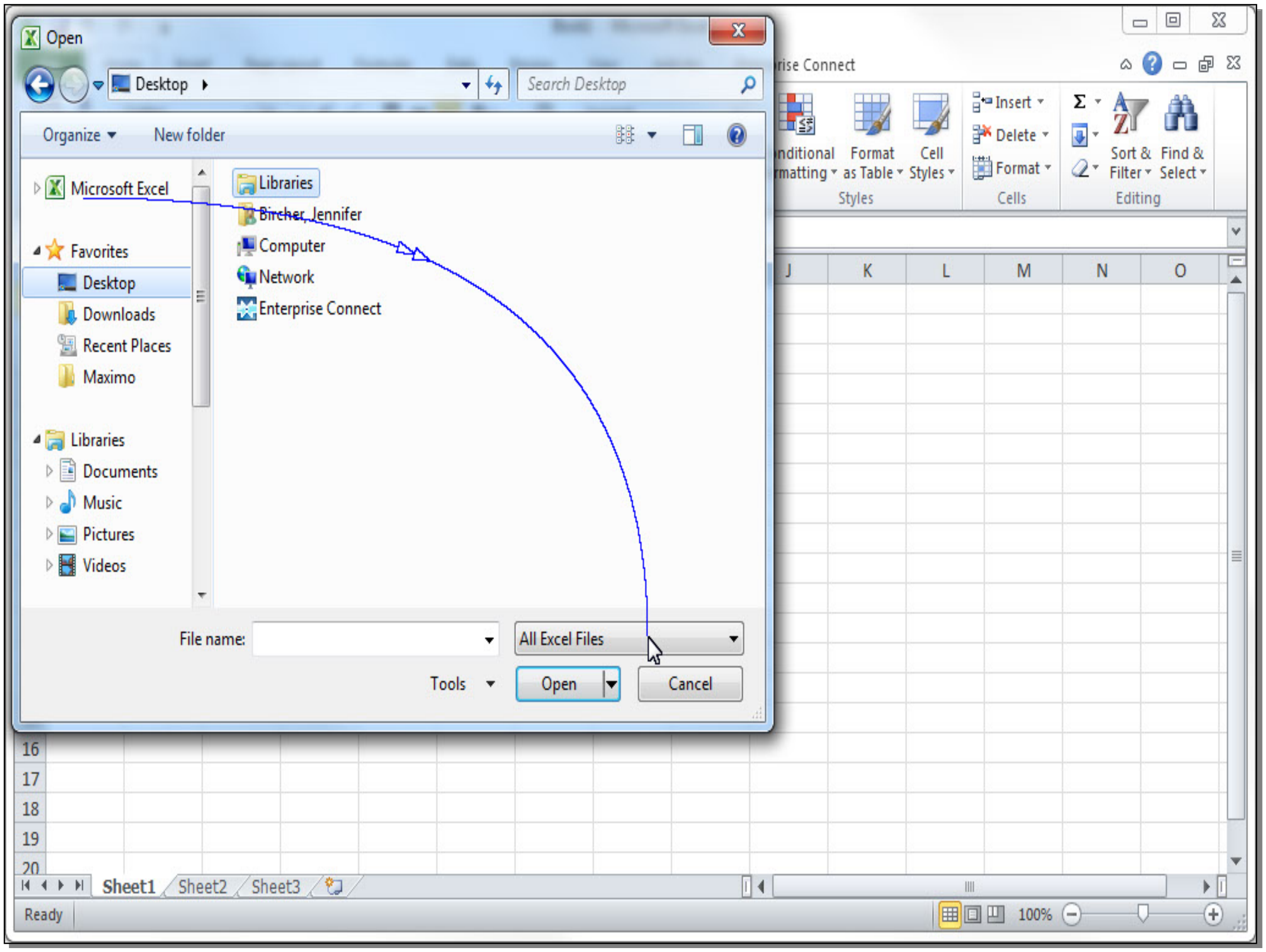
Slide 136 - Demo



Slide notes

Text Captions

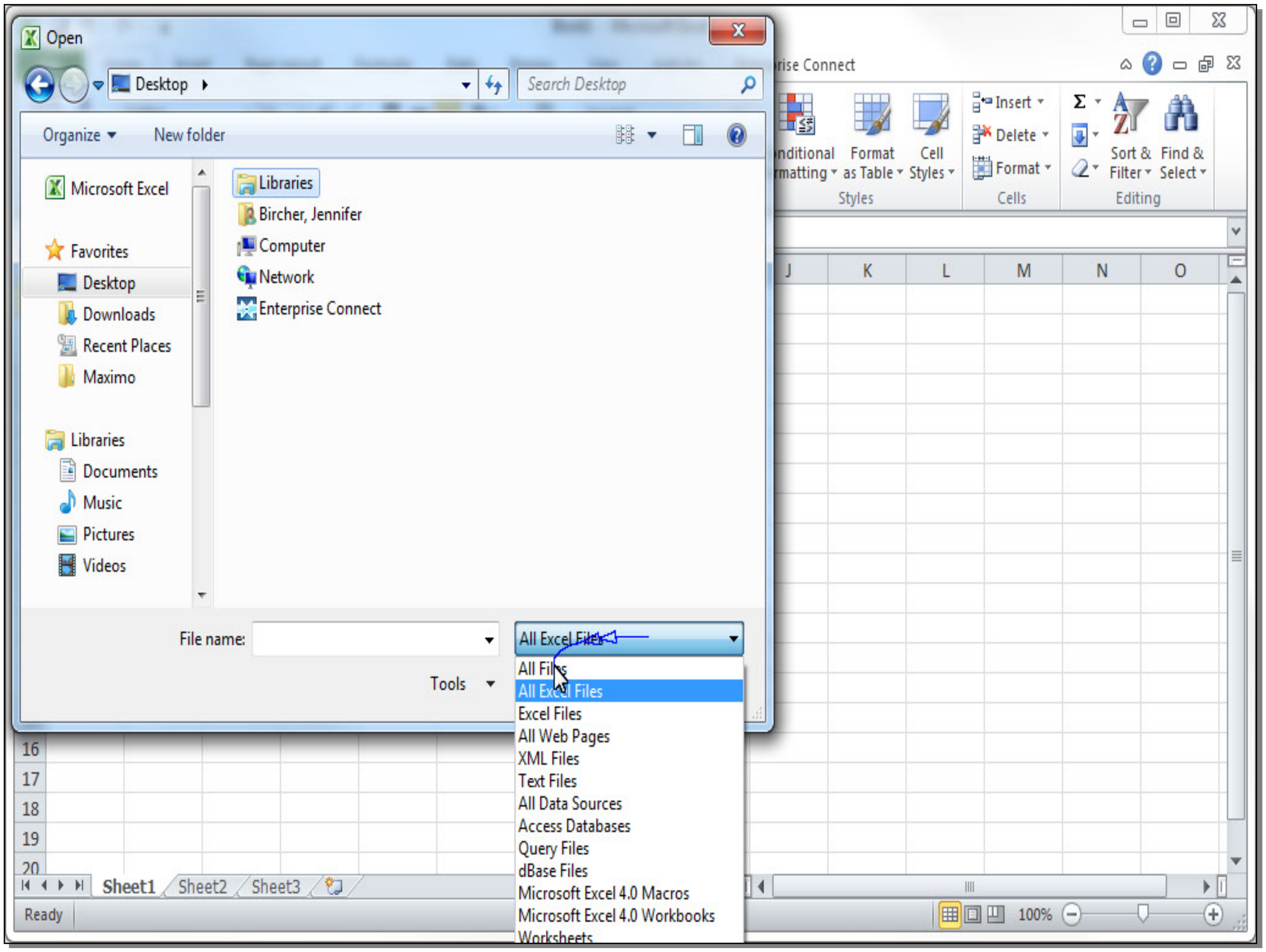
Slide 137 - Demo



Slide notes

Text Captions

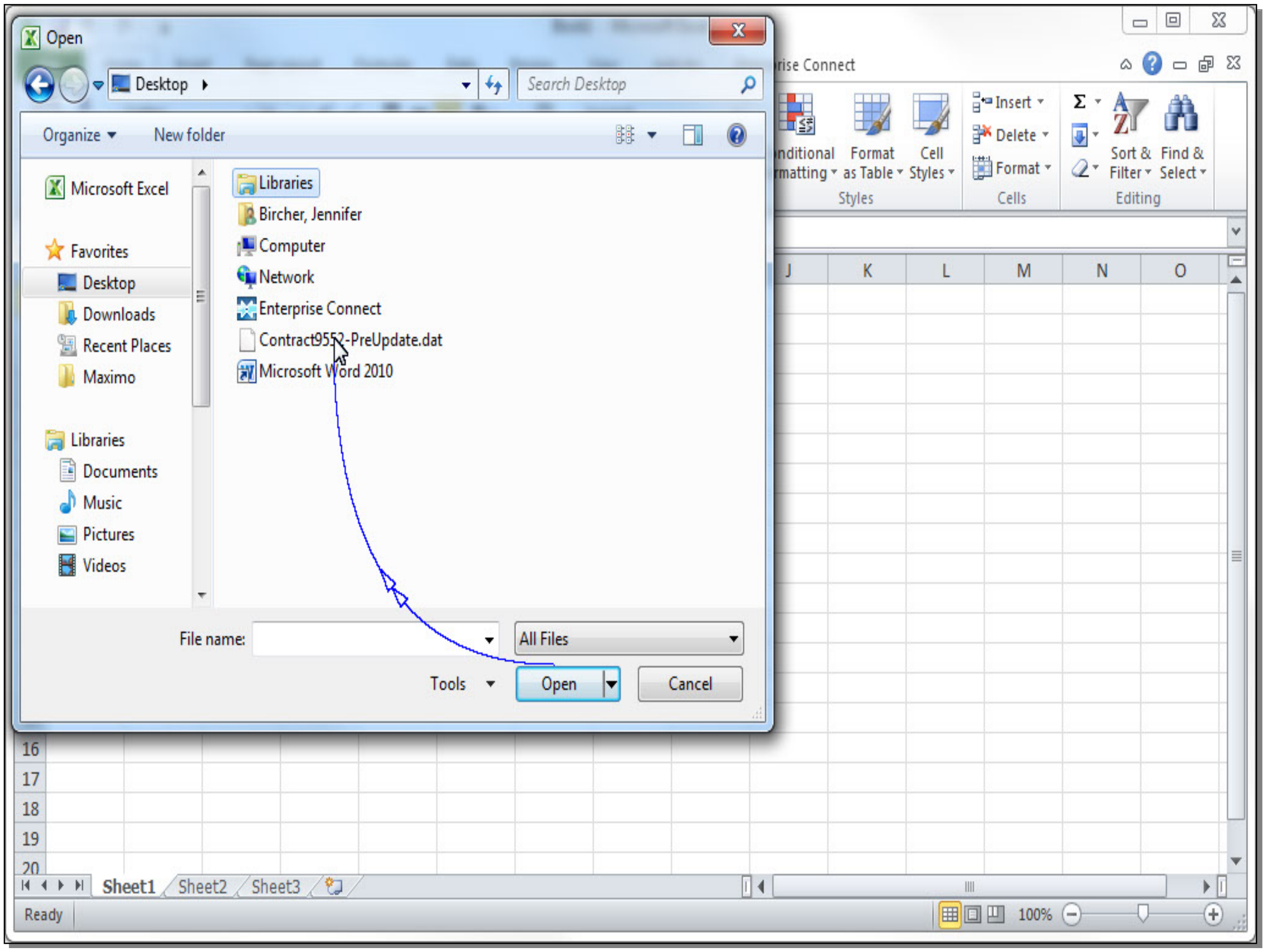
Slide 138 - Demo



Slide notes

Text Captions

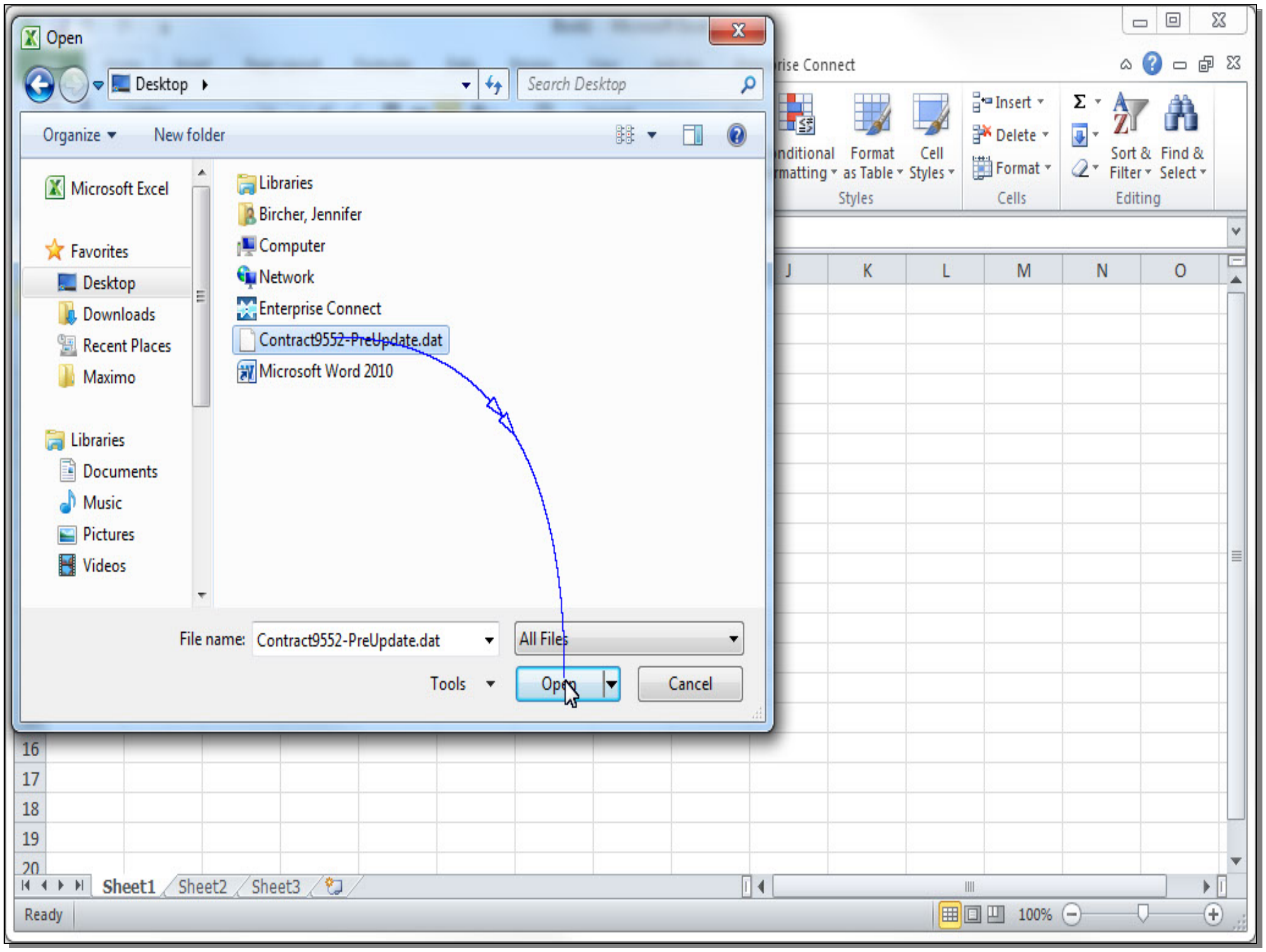
Slide 139 - Demo



Slide notes

Text Captions

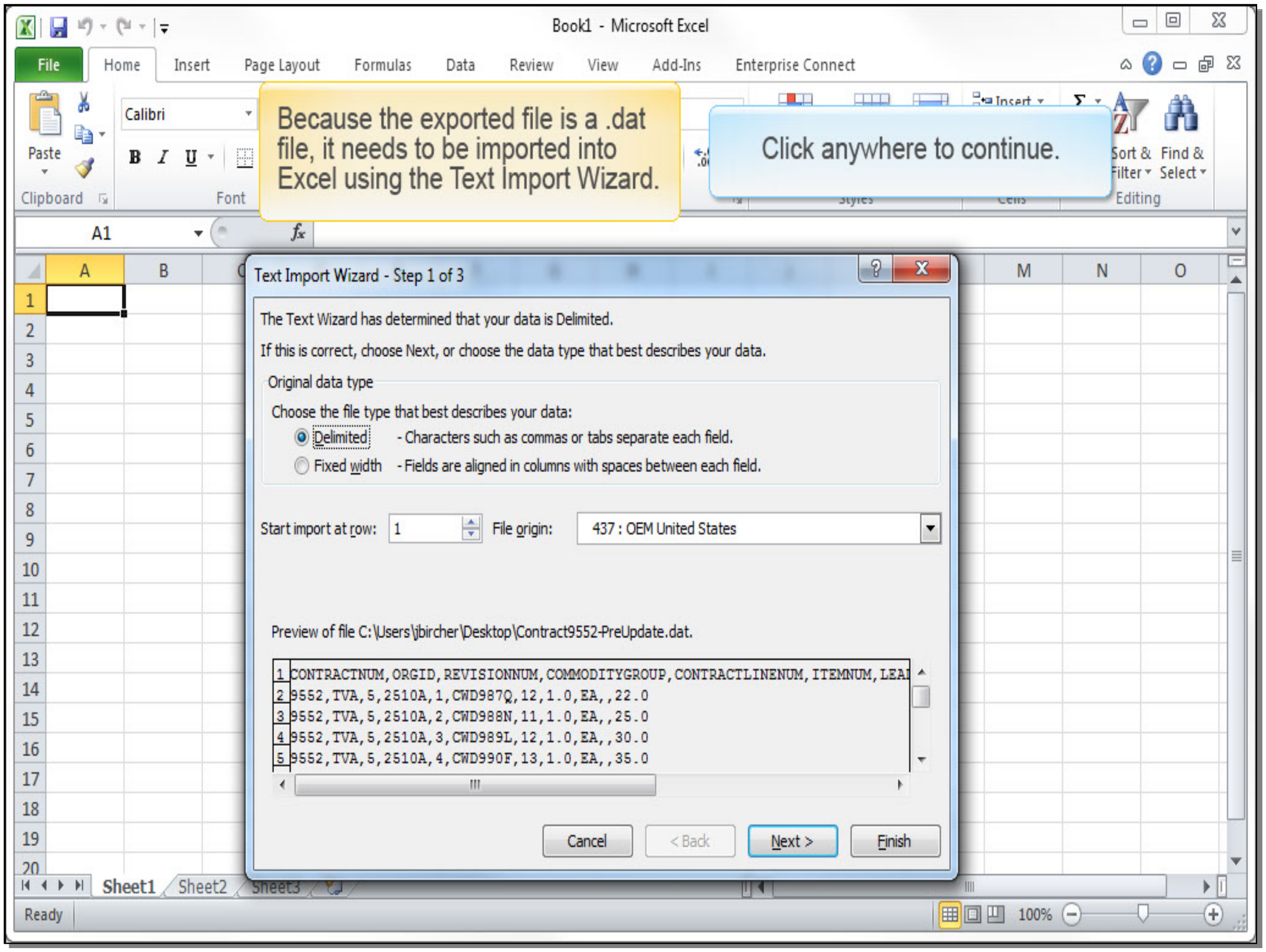
Slide 140 - Demo



Slide notes

Text Captions

Slide 141 - Demo



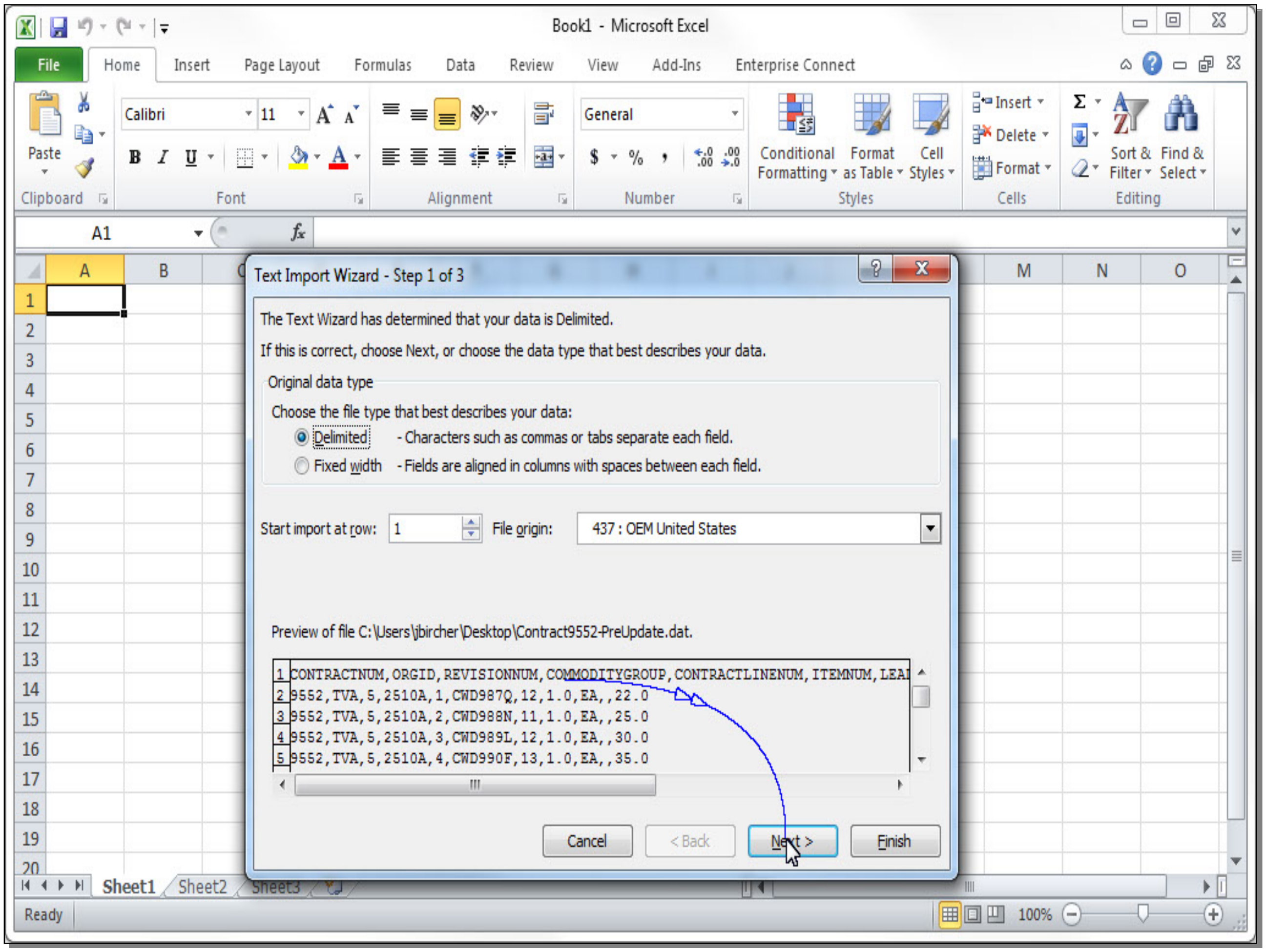
Slide notes

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.

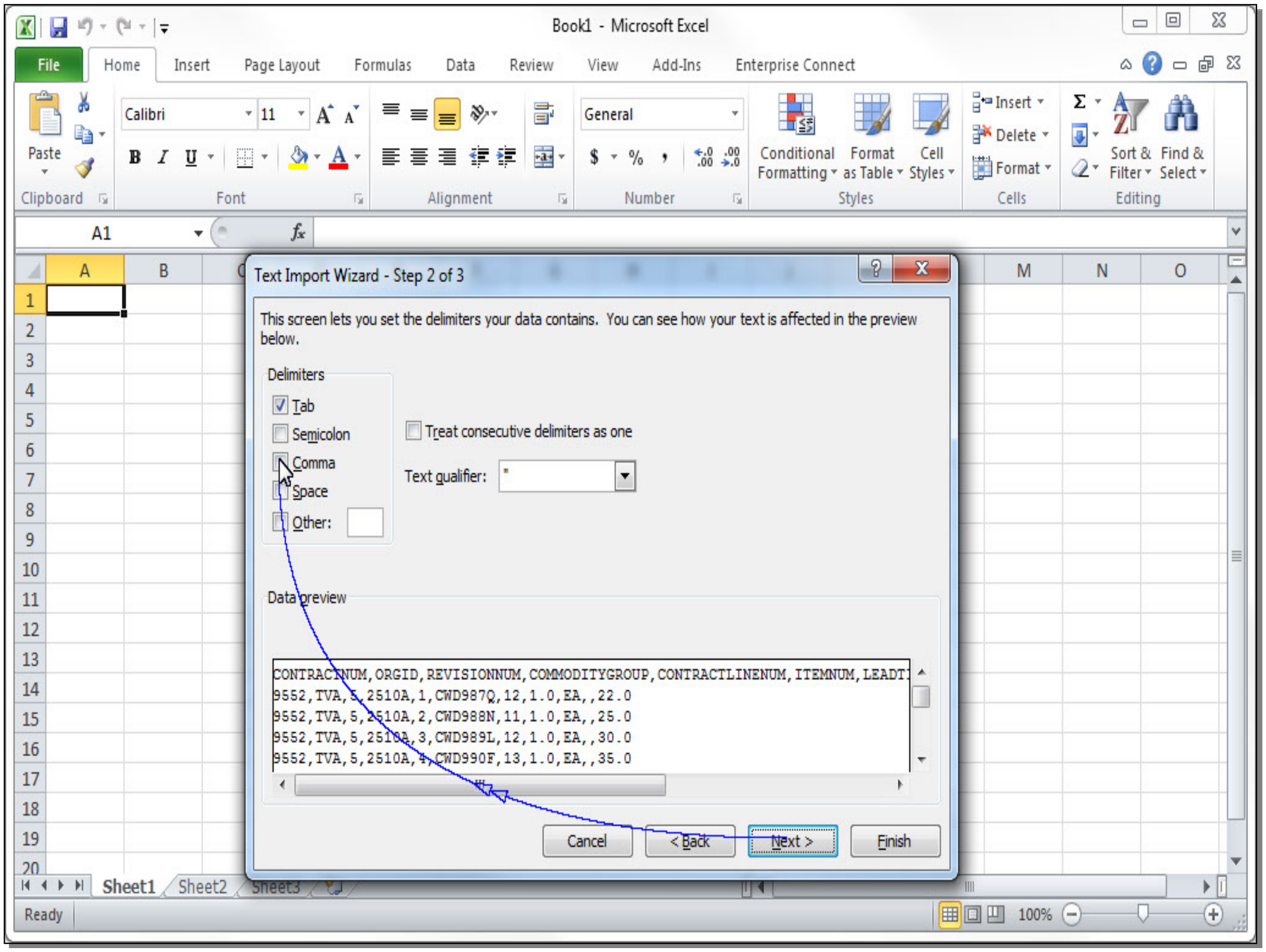
Slide 142 - Demo



Slide notes

Text Captions

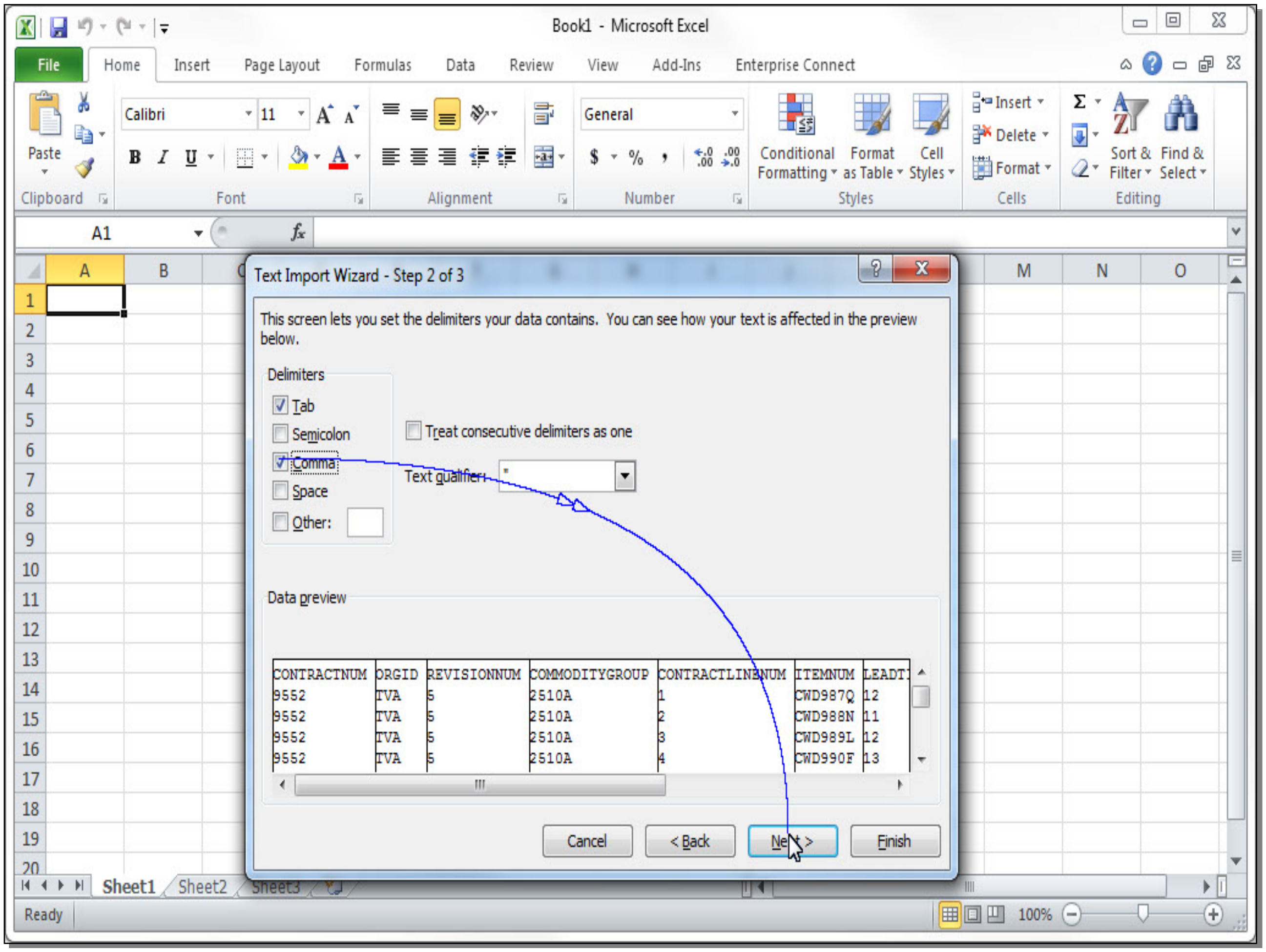
Slide 143 - Demo



Slide notes

Text Captions

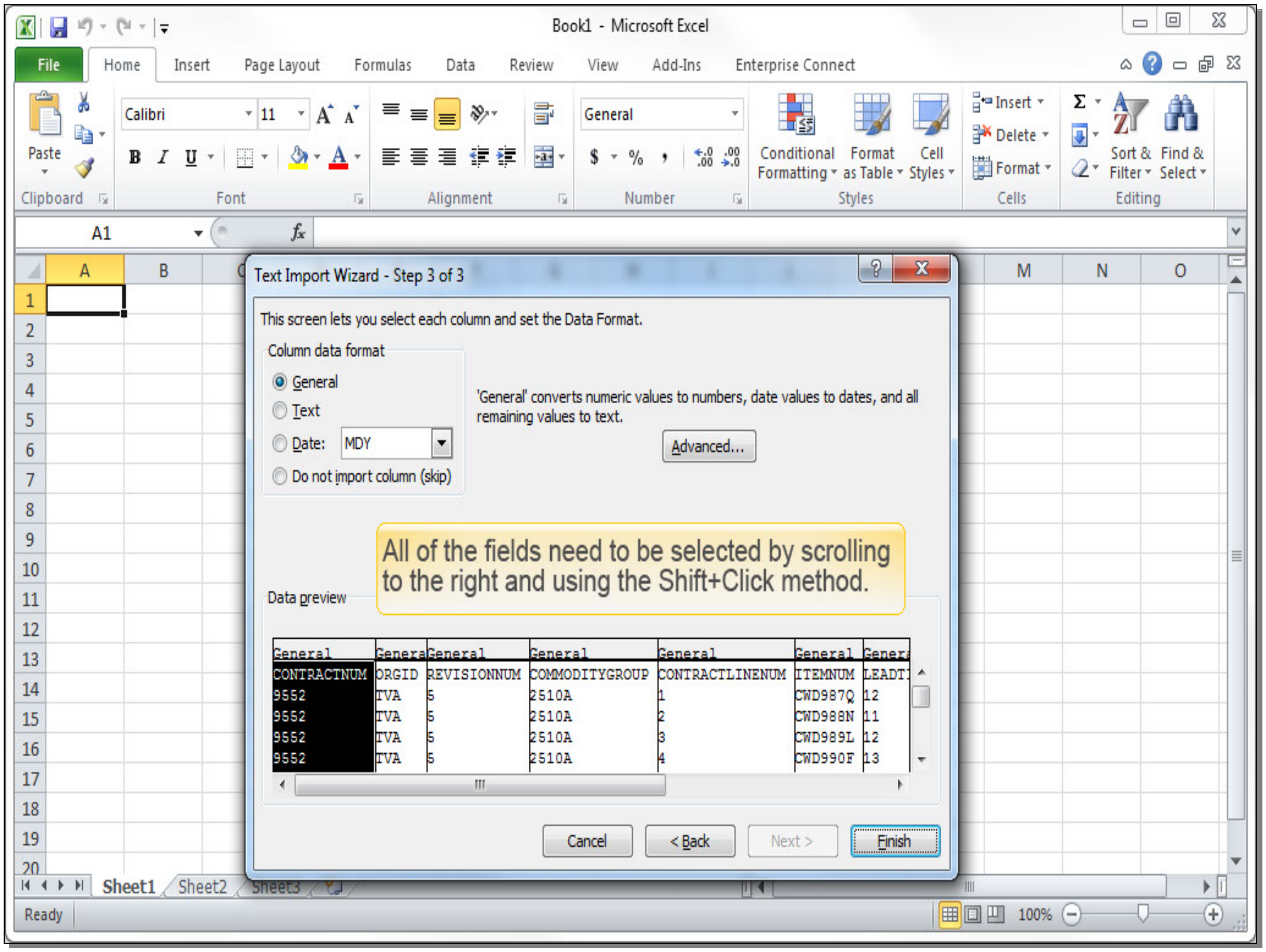
Slide 144 - Demo



Slide notes

Text Captions

Slide 145 - Demo

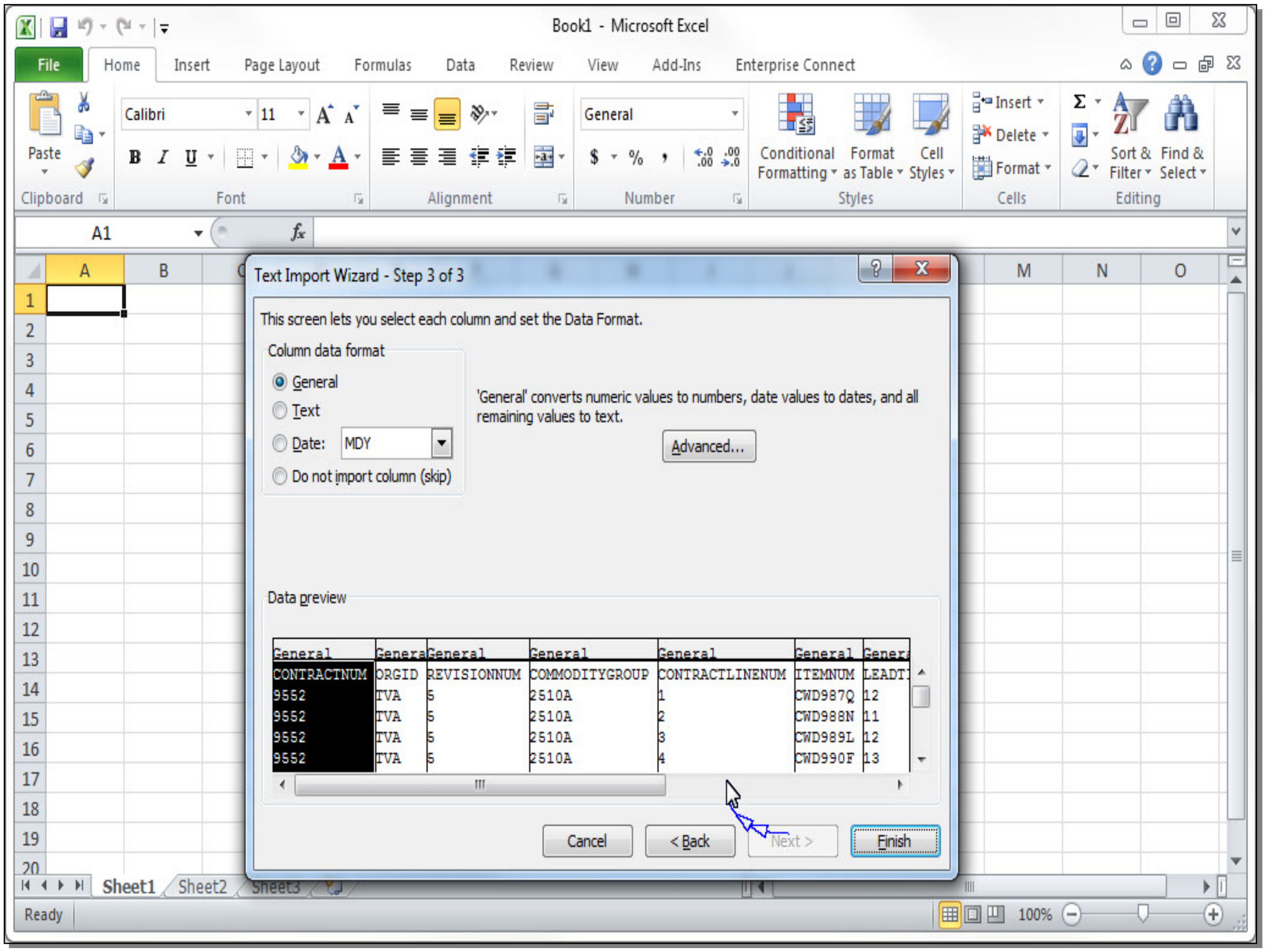


Slide notes

Text Captions

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

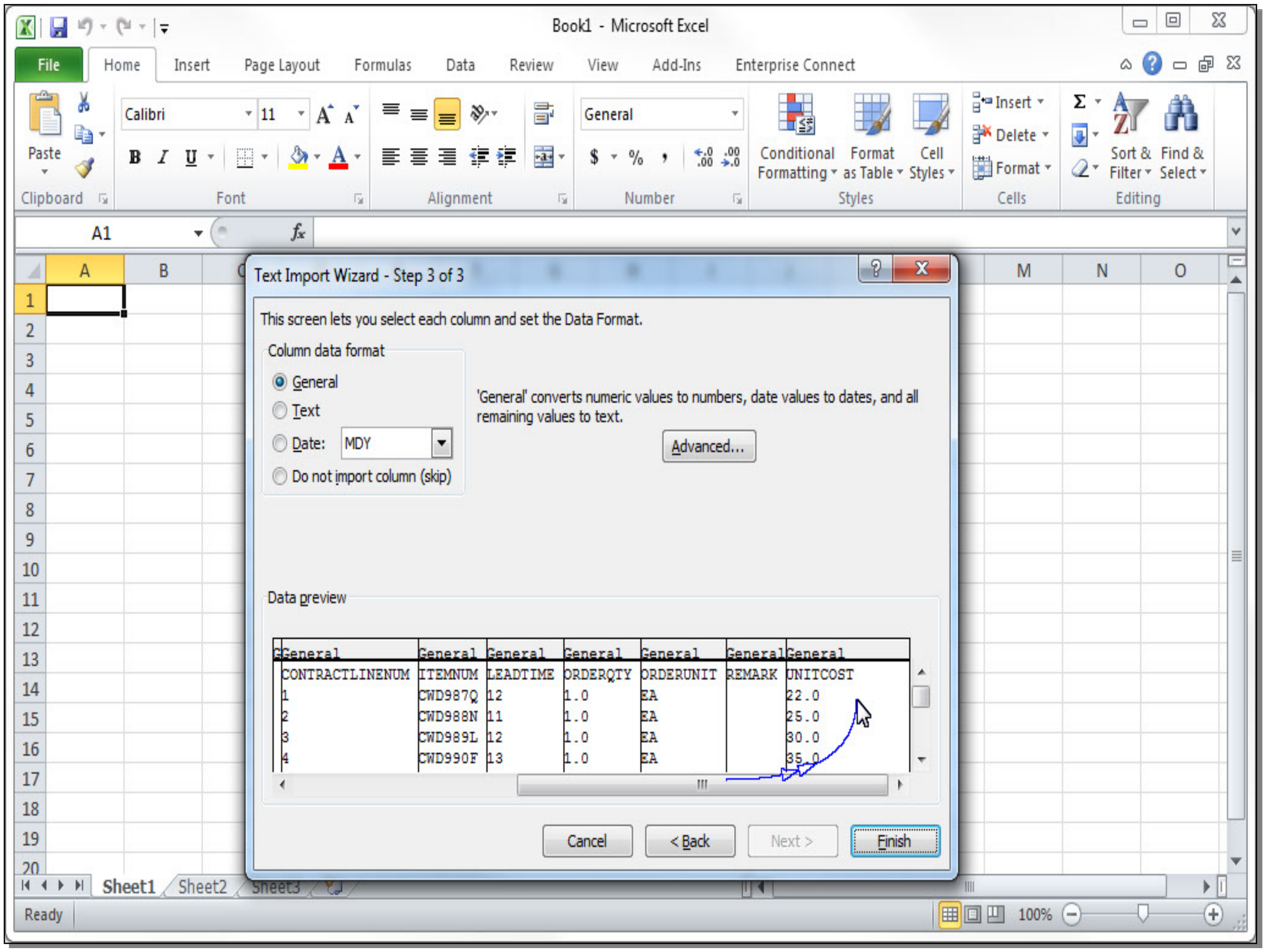
Slide 146 - Demo



Slide notes

Text Captions

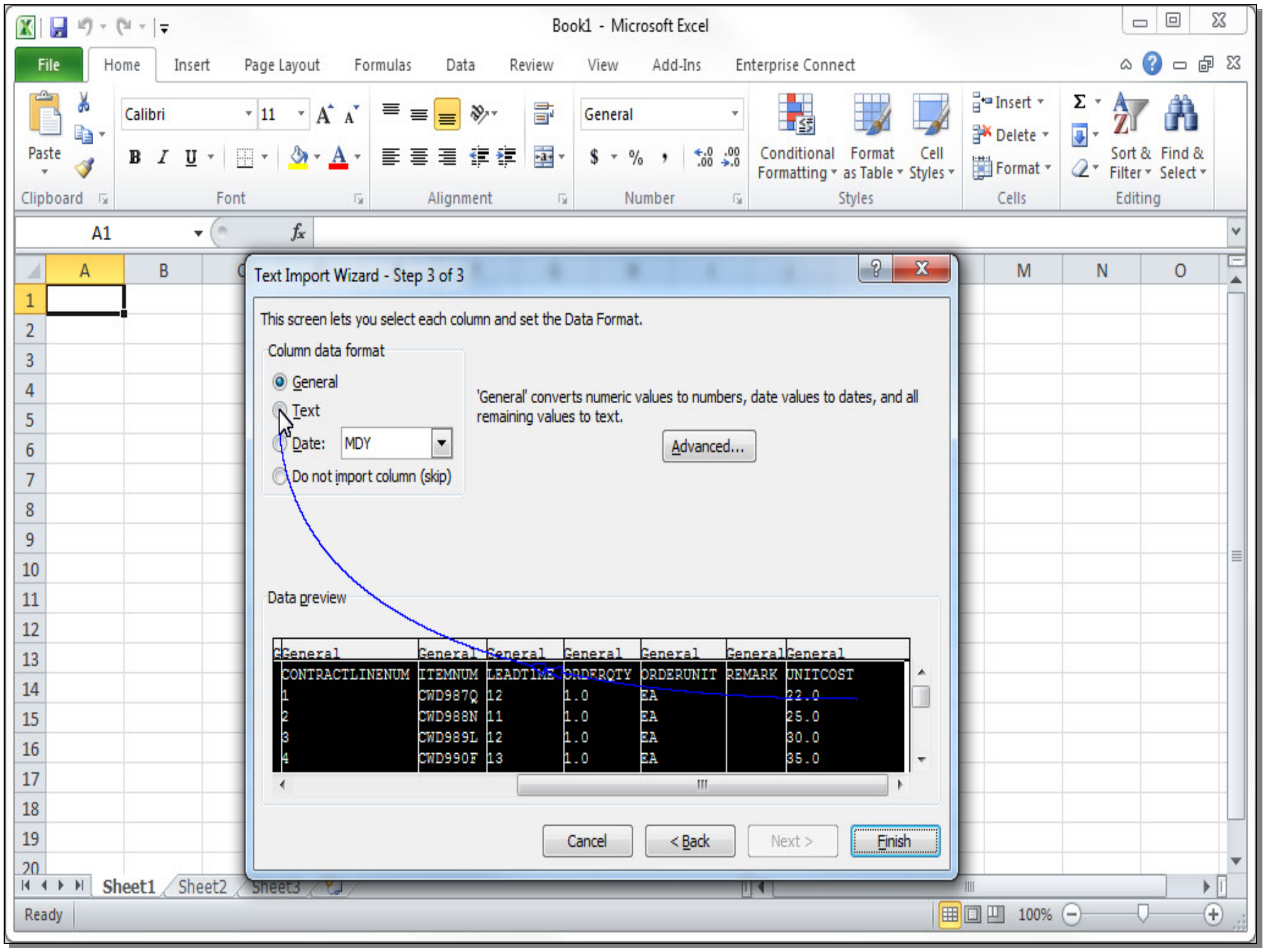
Slide 147 - Demo



Slide notes

Text Captions

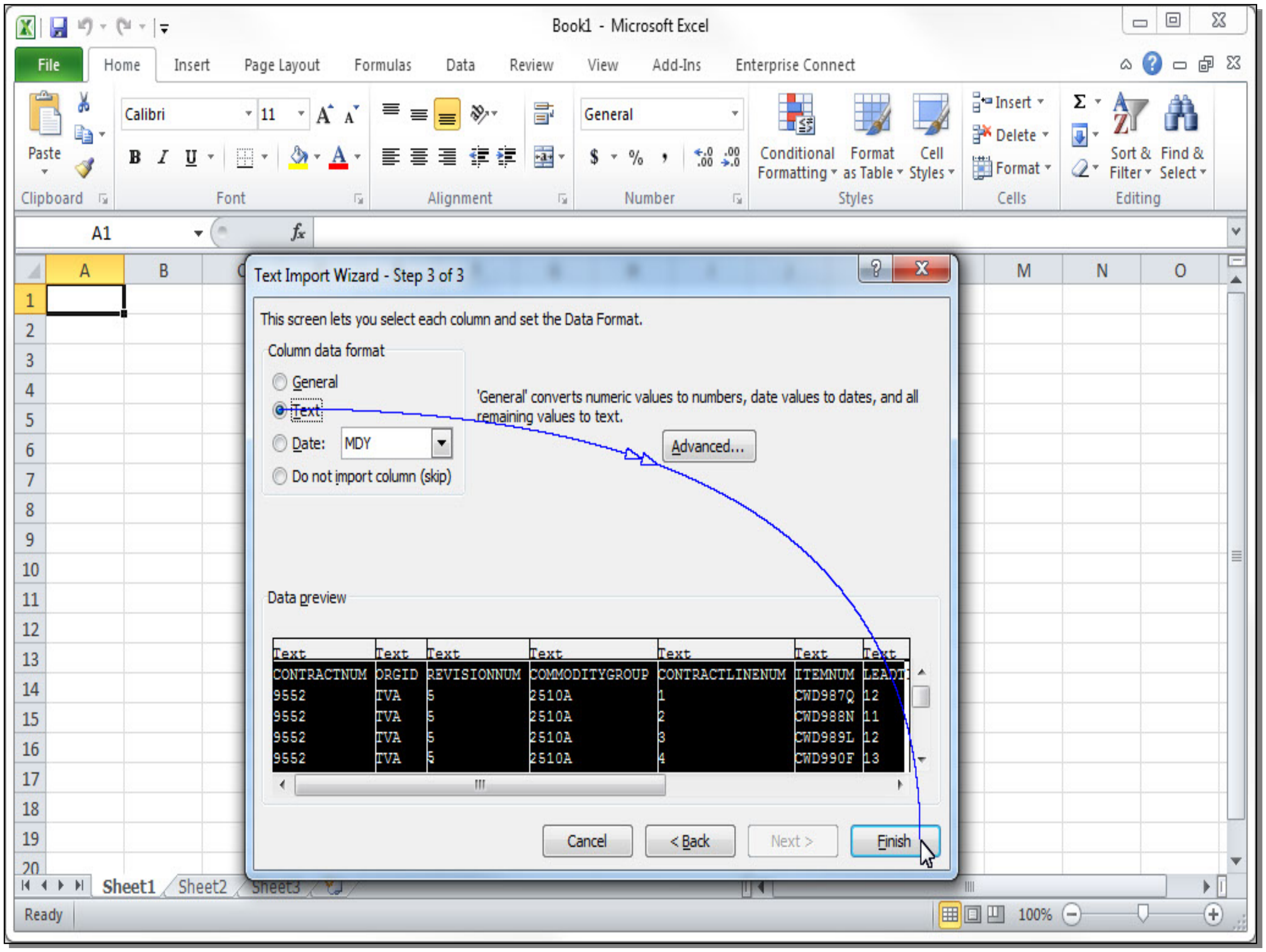
Slide 148 - Demo



Slide notes

Text Captions

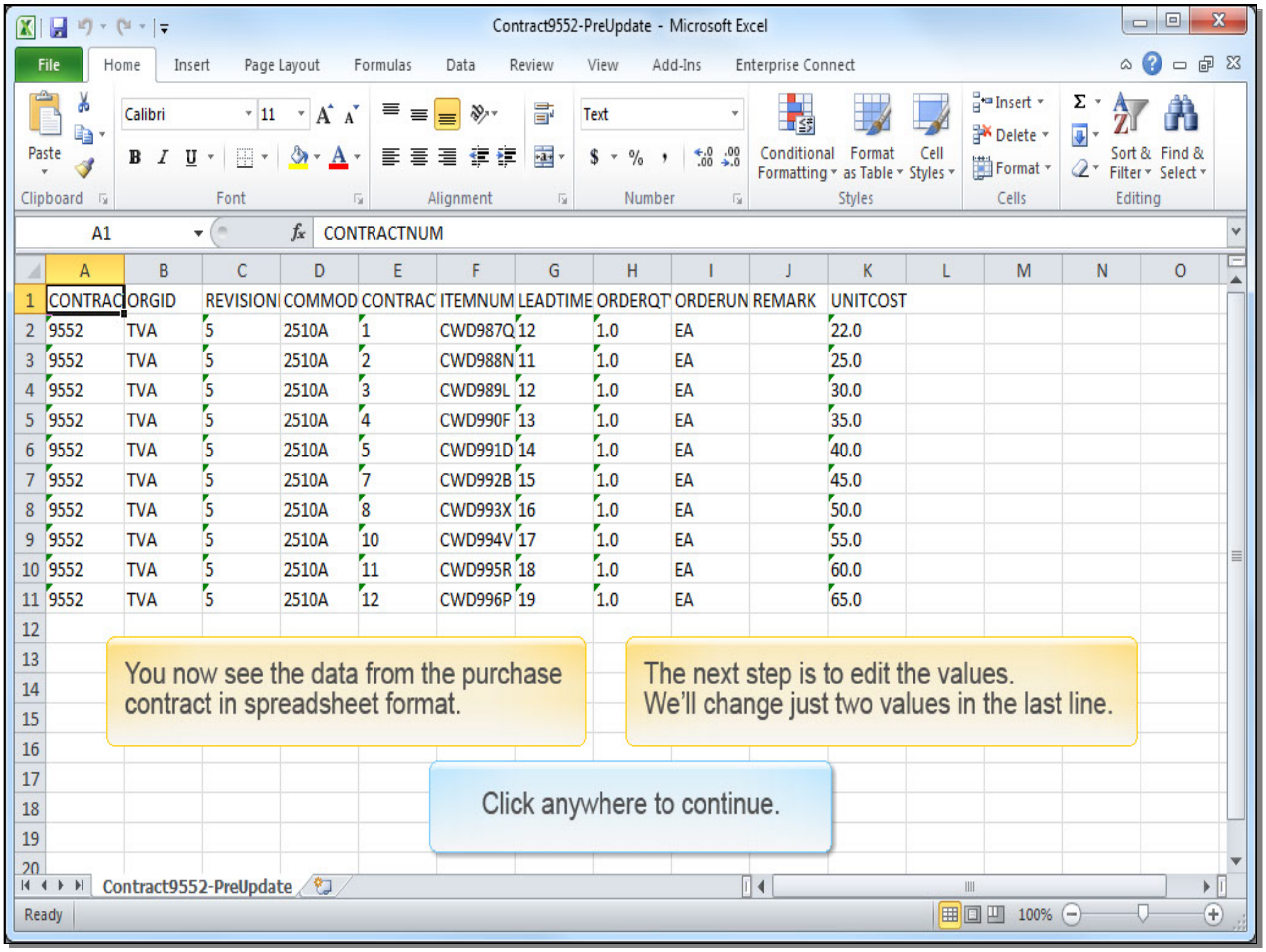
Slide 149 - Demo



Slide notes

Text Captions

Slide 150 - Demo



Slide notes

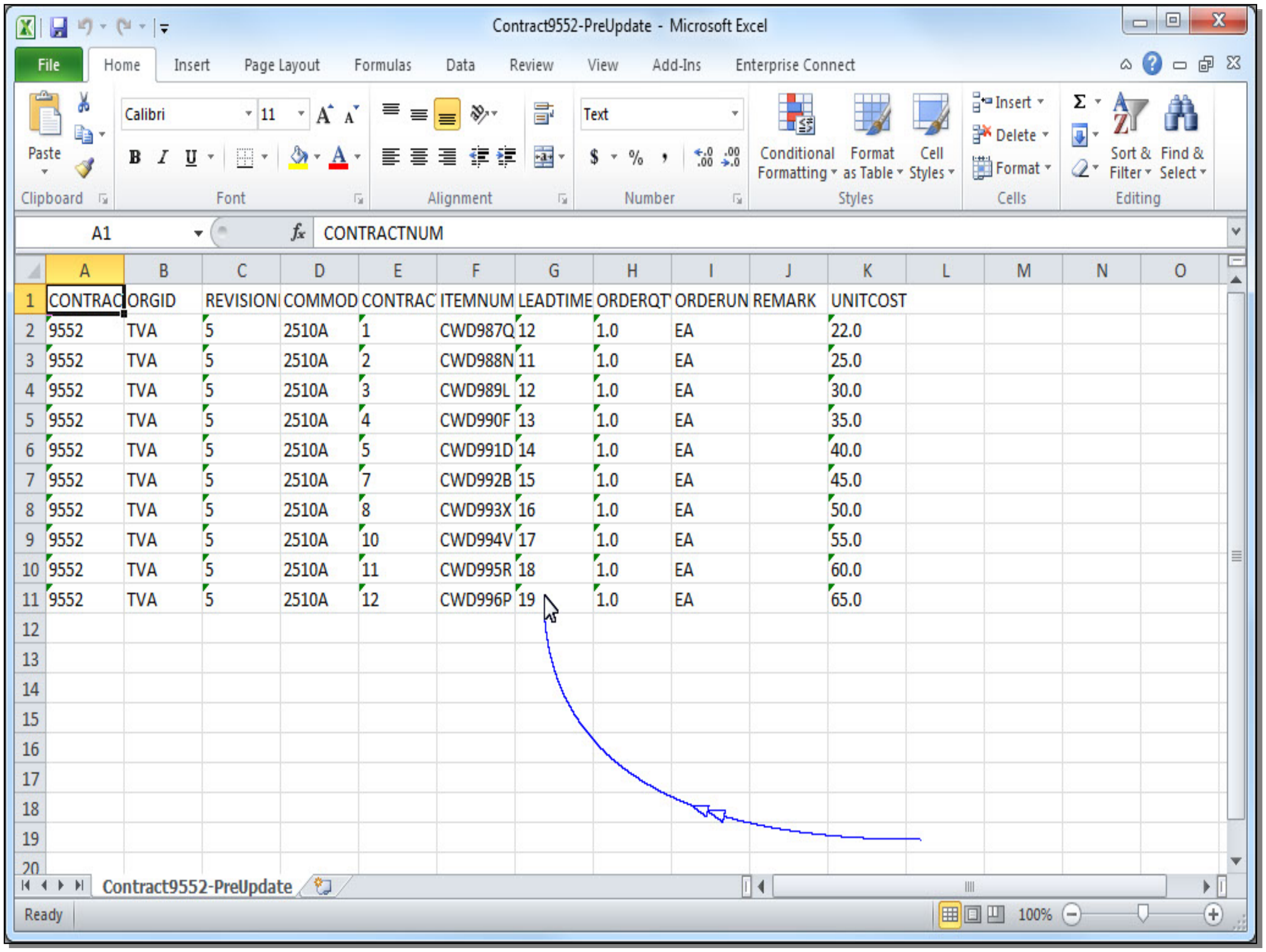
Text Captions

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.

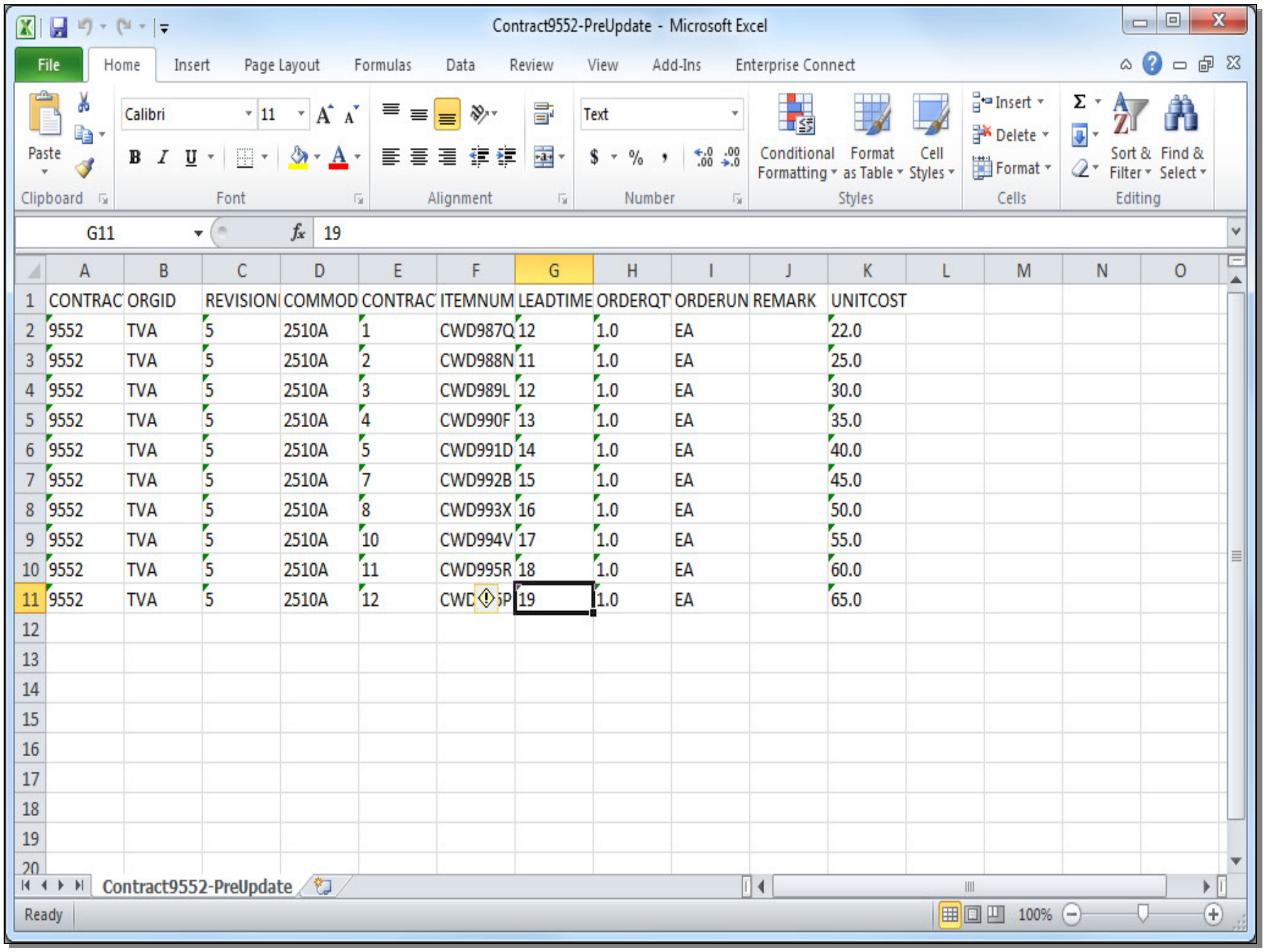
Slide 151 - Demo



Slide notes

Text Captions

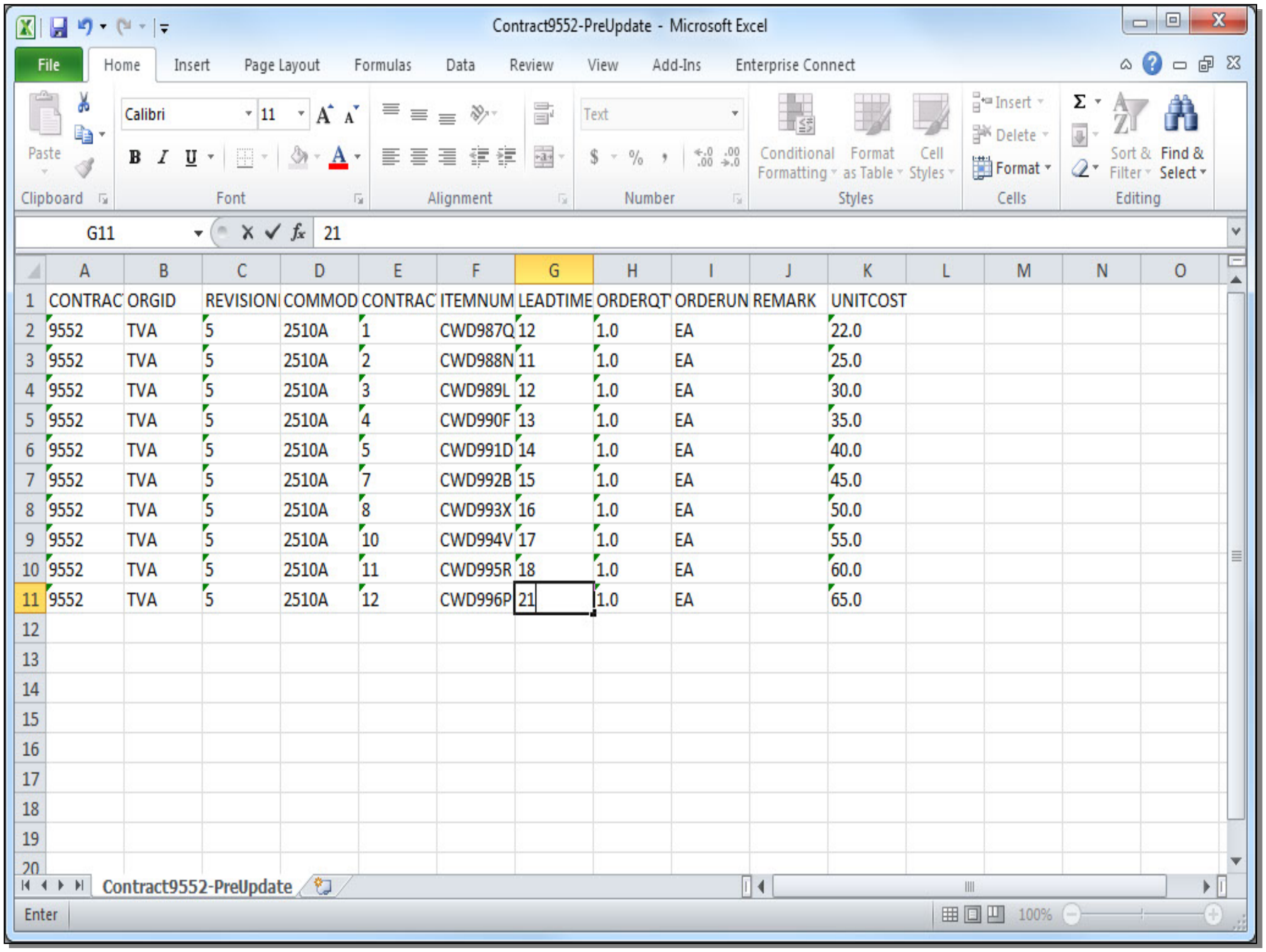
Slide 152 - Demo



Slide notes

Text Captions

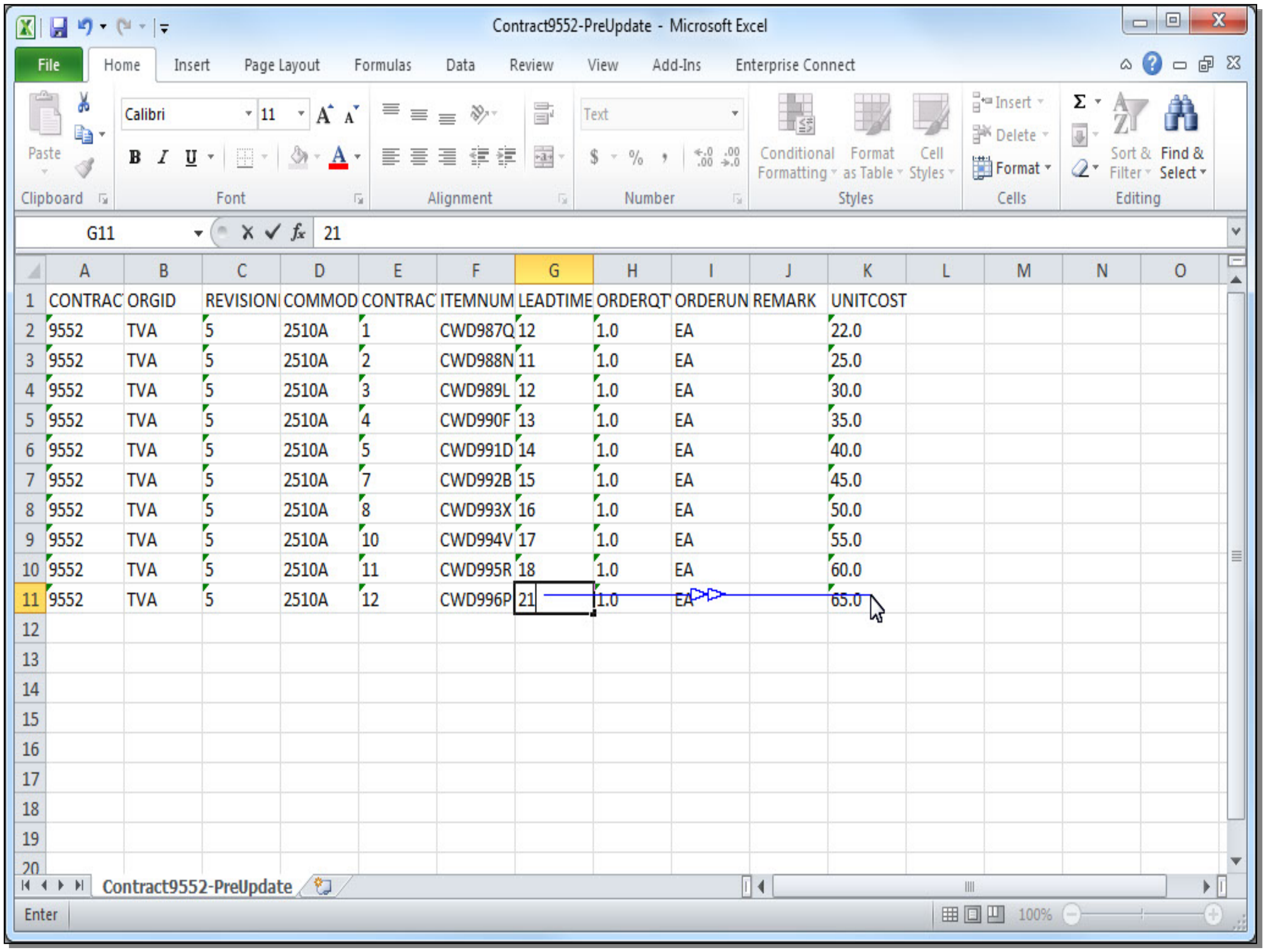
Slide 153 - Demo



Slide notes

Text Captions

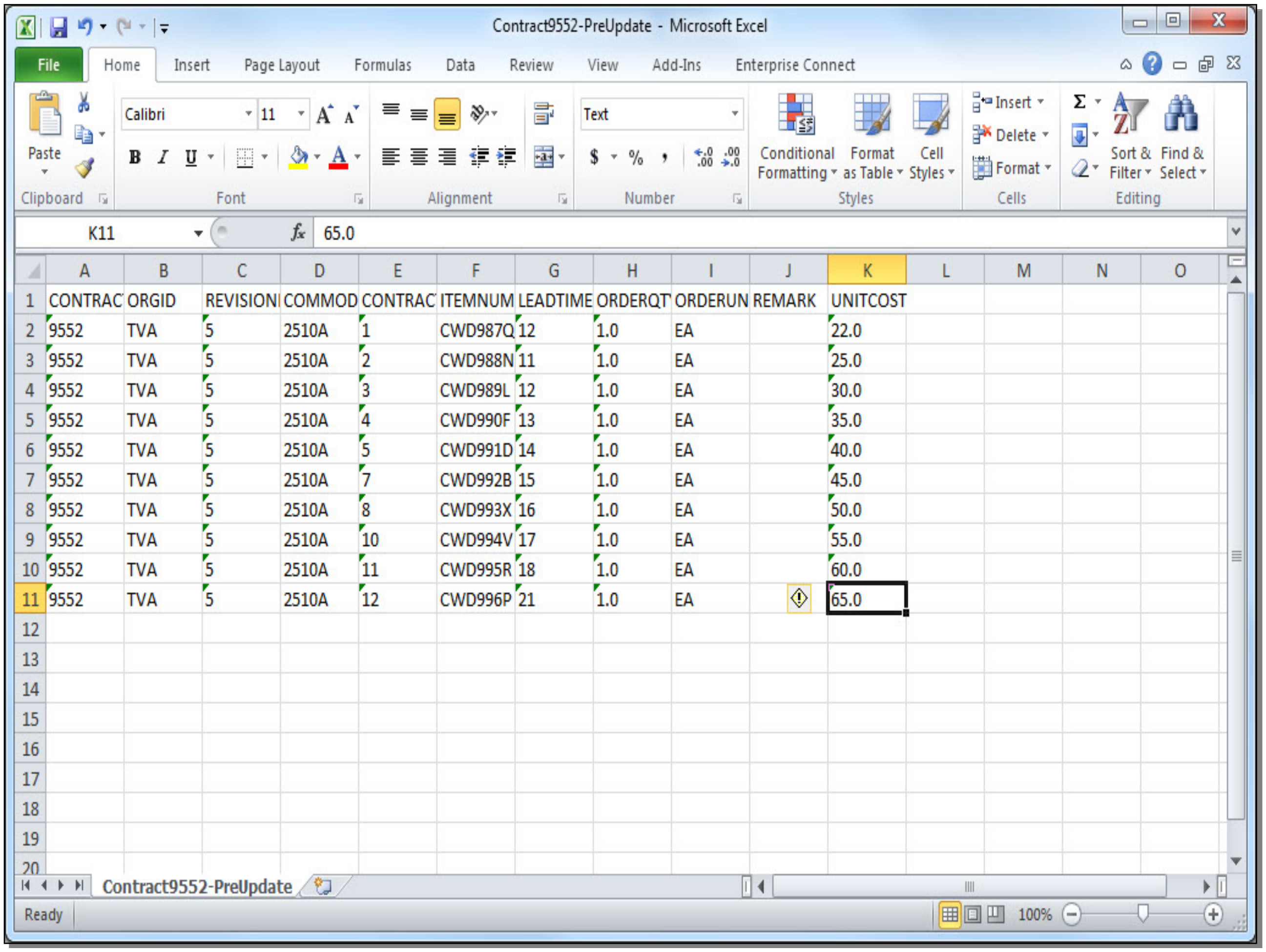
Slide 154 - Demo



Slide notes

Text Captions

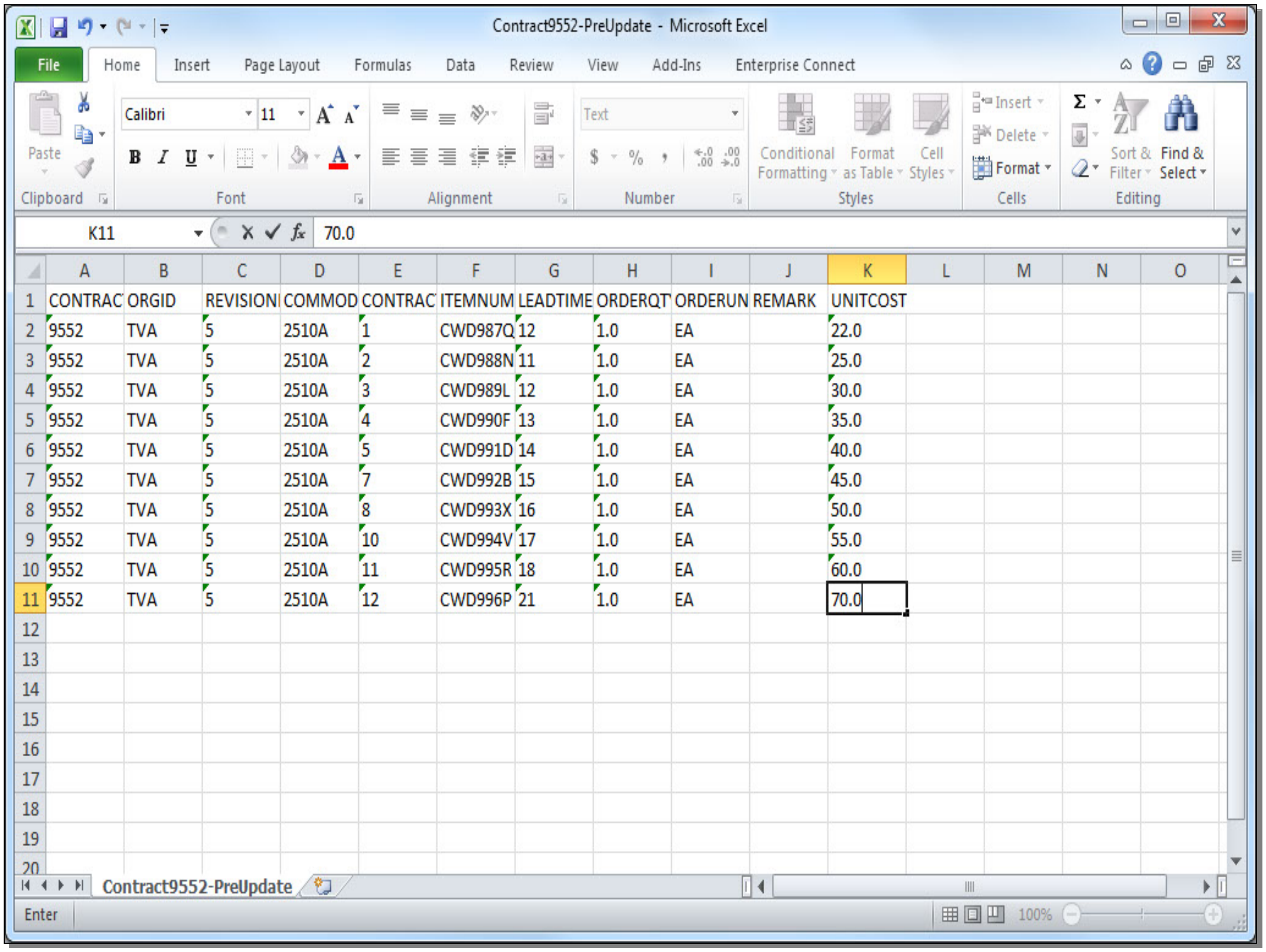
Slide 155 - Demo



Slide notes

Text Captions

Slide 156 - Demo

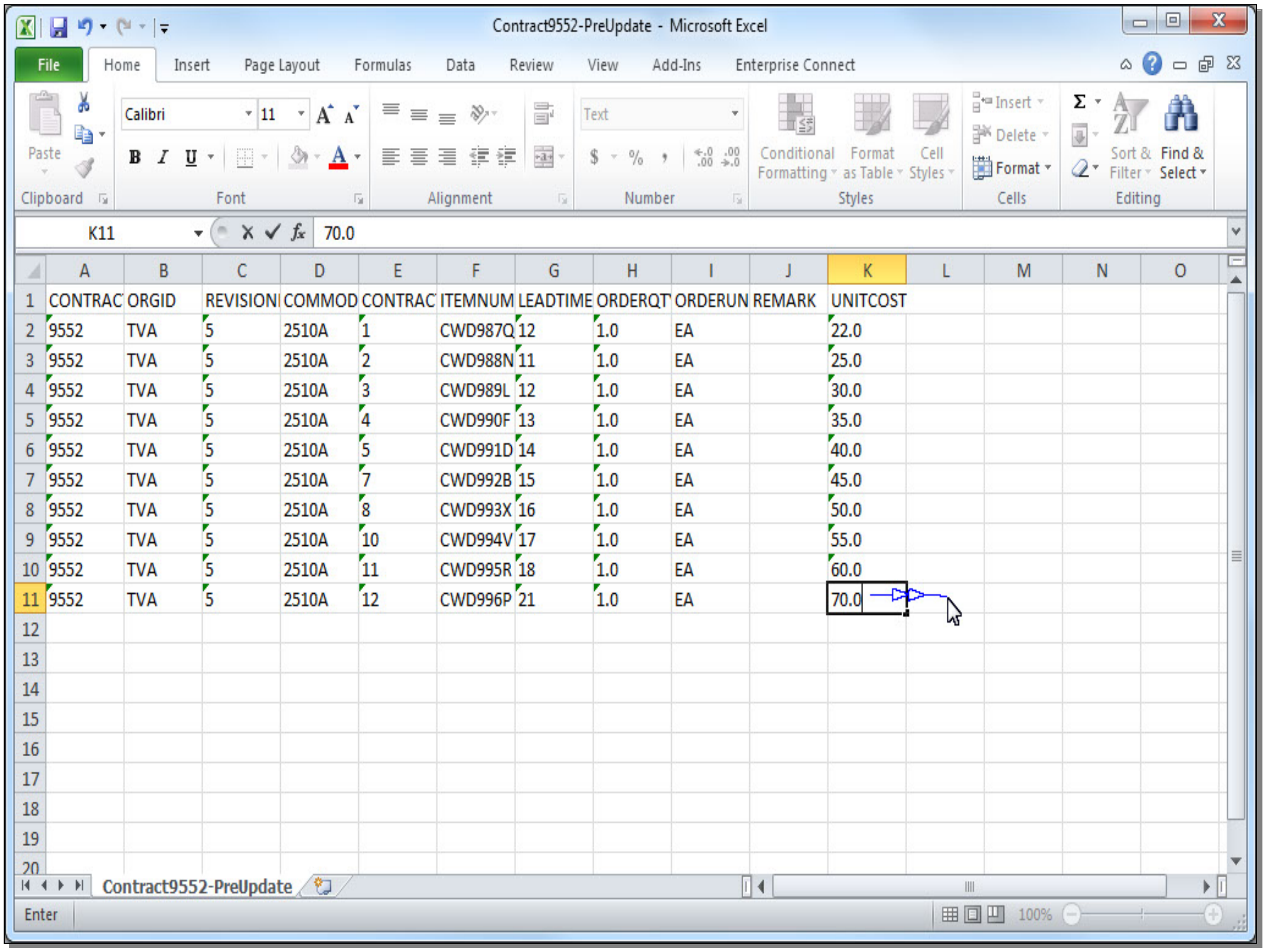


	A	B	C	D	E	F	G	H	I	J	K
1	CONTRAC	ORGID	REVISIONI	COMMOD	CONTRAC	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST
2	9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0
3	9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0
4	9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0
5	9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0
6	9552	TVA	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

Slide notes

Text Captions

Slide 157 - Demo

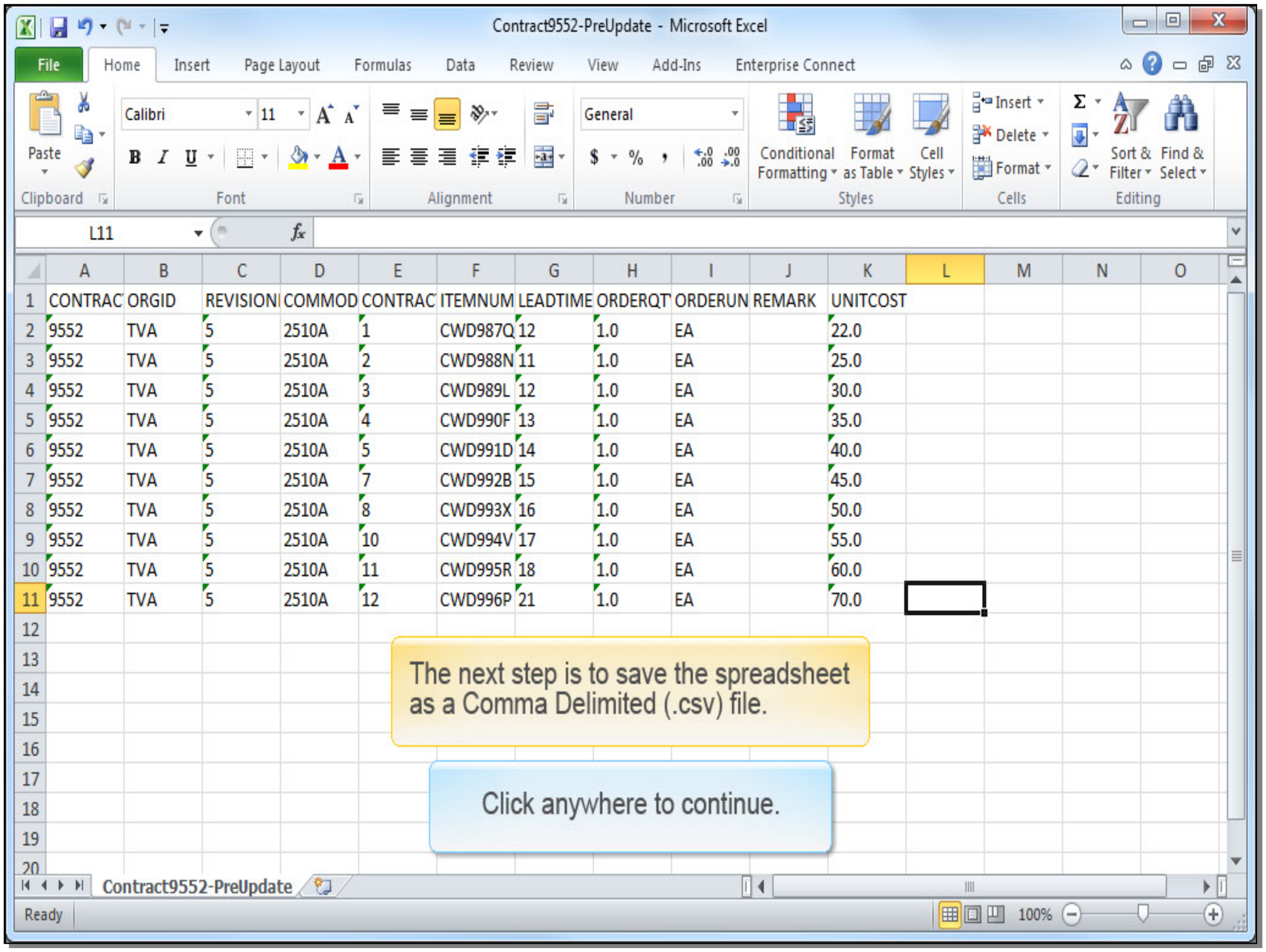


CONTRAC	ORGID	REVISIONI	COMMOD	CONTRAC	ITEMNUM	LEADTIME	ORDERQT	ORDERUN	REMARK	UNITCOST
9552	TVA	5	2510A	1	CWD987Q	12	1.0	EA		22.0
9552	TVA	5	2510A	2	CWD988N	11	1.0	EA		25.0
9552	TVA	5	2510A	3	CWD989L	12	1.0	EA		30.0
9552	TVA	5	2510A	4	CWD990F	13	1.0	EA		35.0
9552	TVA	5	2510A	5	CWD991D	14	1.0	EA		40.0
9552	TVA	5	2510A	7	CWD992B	15	1.0	EA		45.0
9552	TVA	5	2510A	8	CWD993X	16	1.0	EA		50.0
9552	TVA	5	2510A	10	CWD994V	17	1.0	EA		55.0
9552	TVA	5	2510A	11	CWD995R	18	1.0	EA		60.0
9552	TVA	5	2510A	12	CWD996P	21	1.0	EA		70.0

Slide notes

Text Captions

Slide 158 - Demo



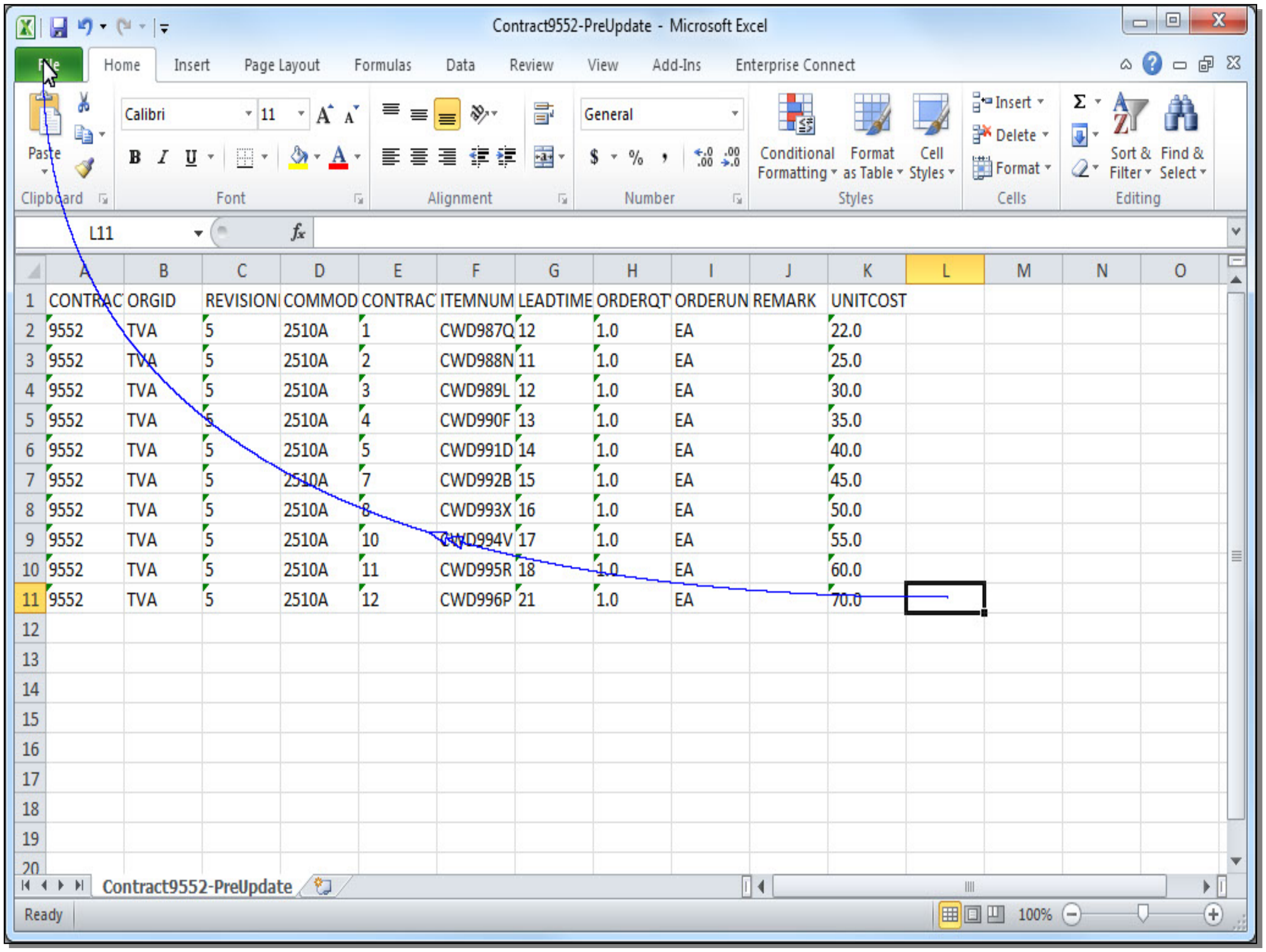
Slide notes

Text Captions

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

Click anywhere to continue.

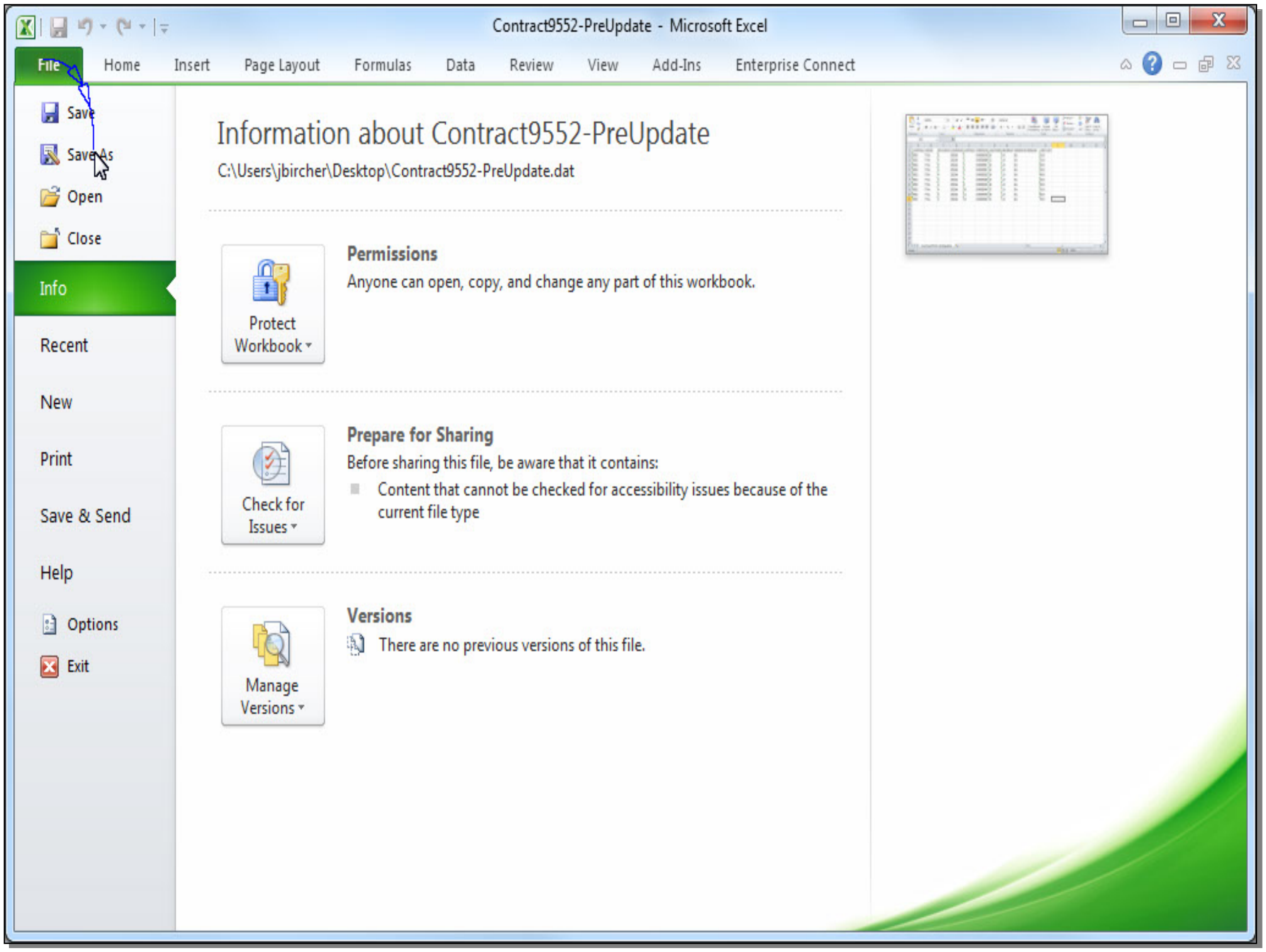
Slide 159 - Demo



Slide notes

Text Captions

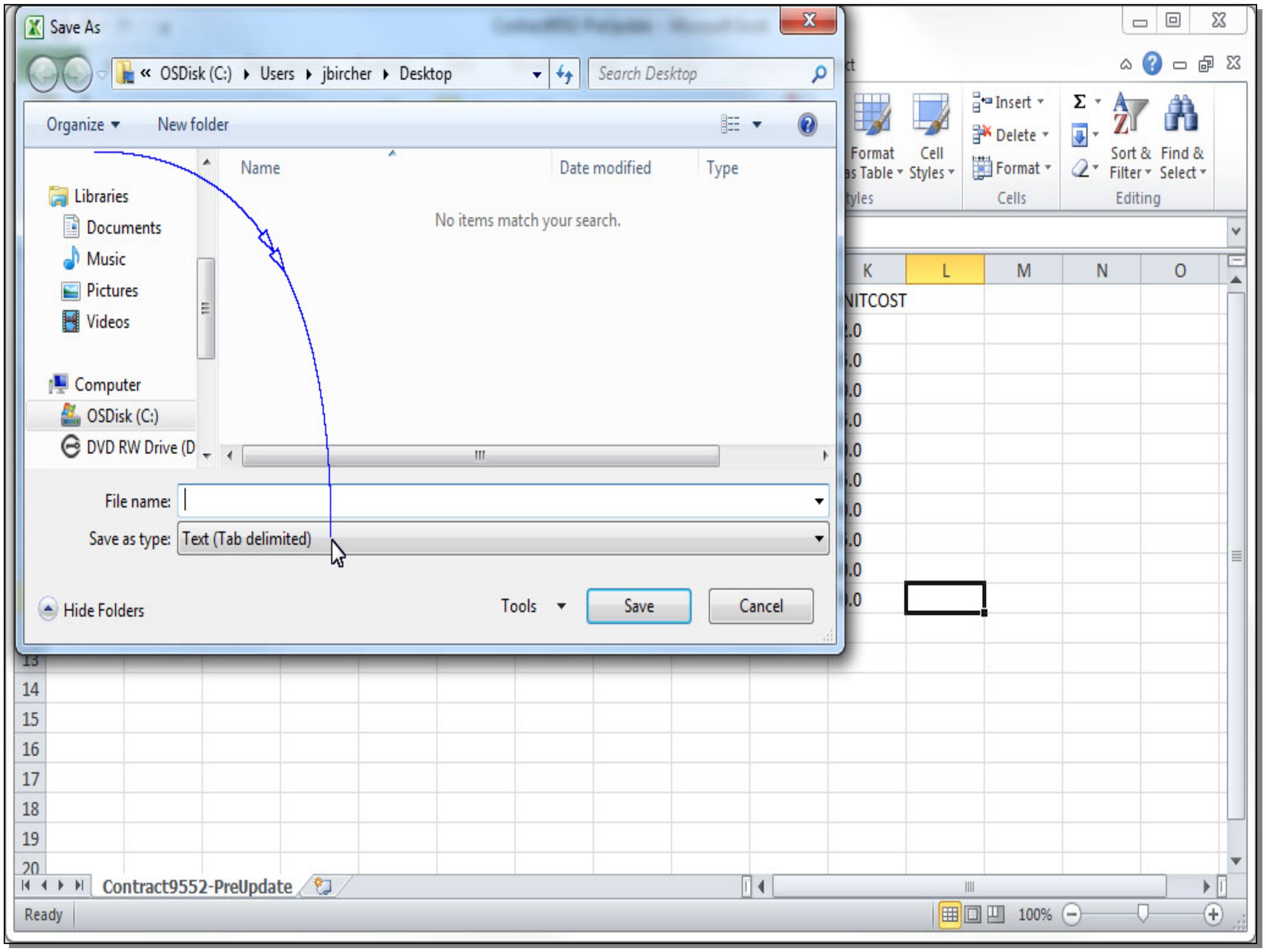
Slide 160 - Demo



Slide notes

Text Captions

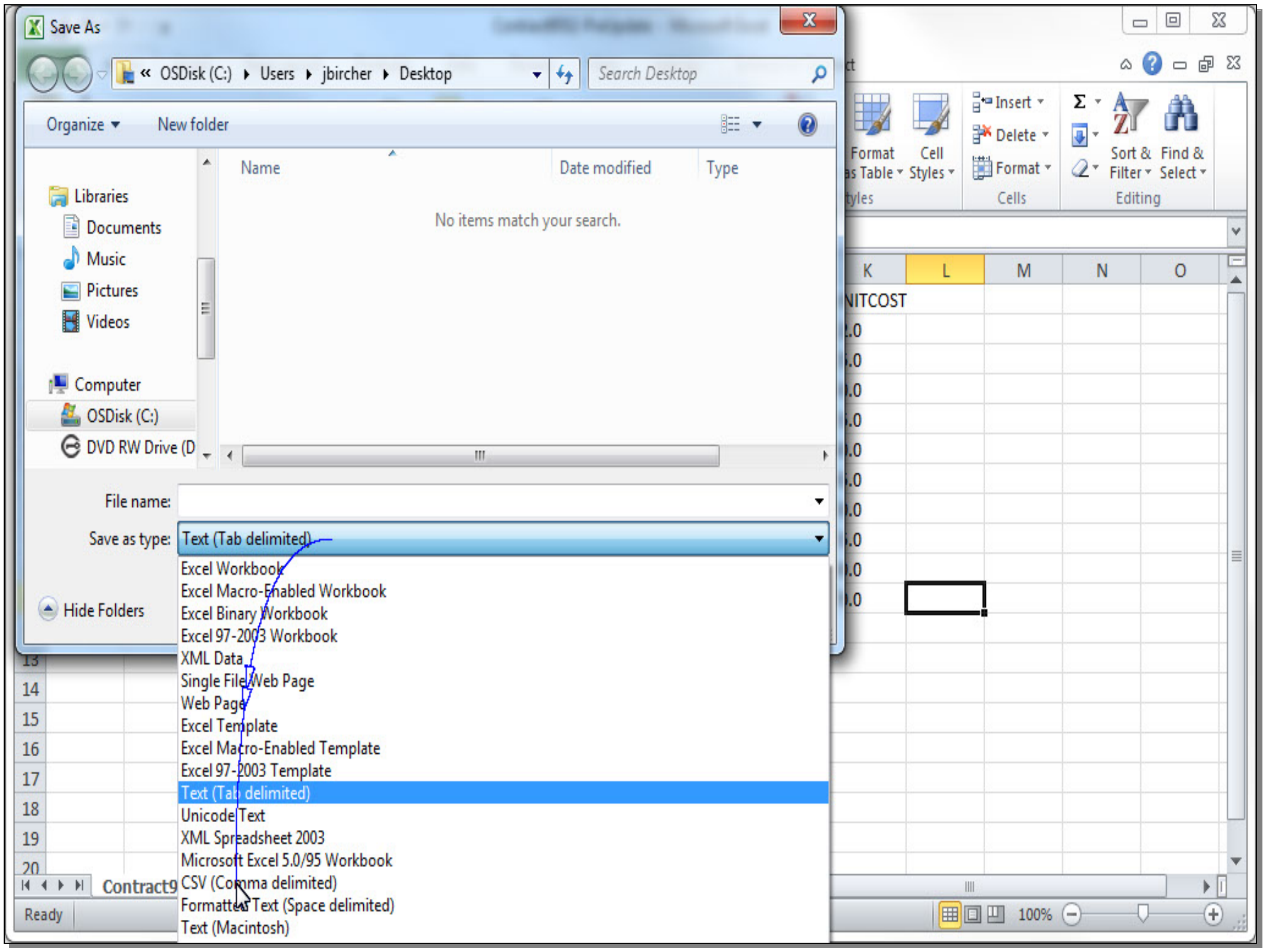
Slide 161 - Demo



Slide notes

Text Captions

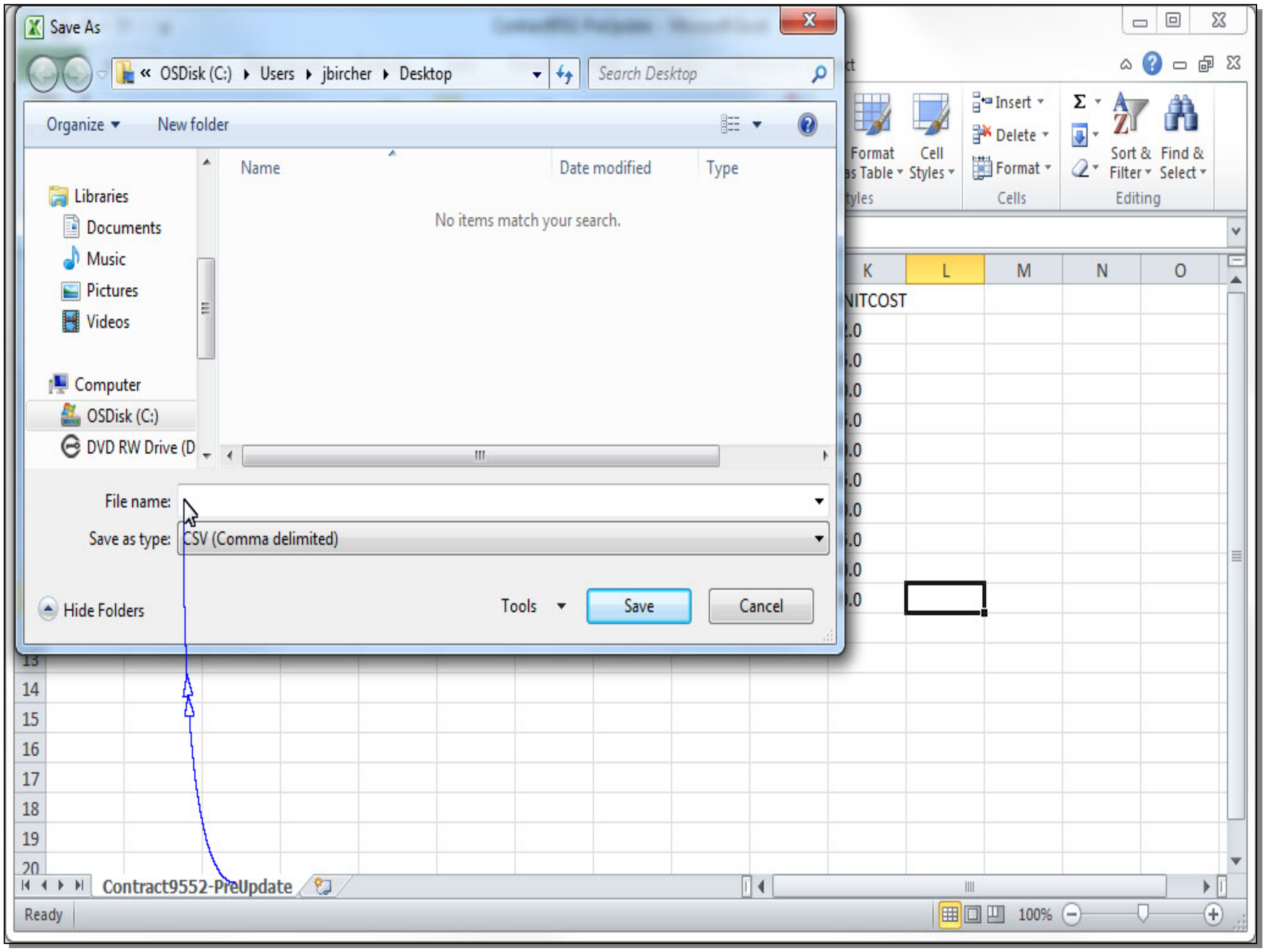
Slide 162 - Demo



Slide notes

Text Captions

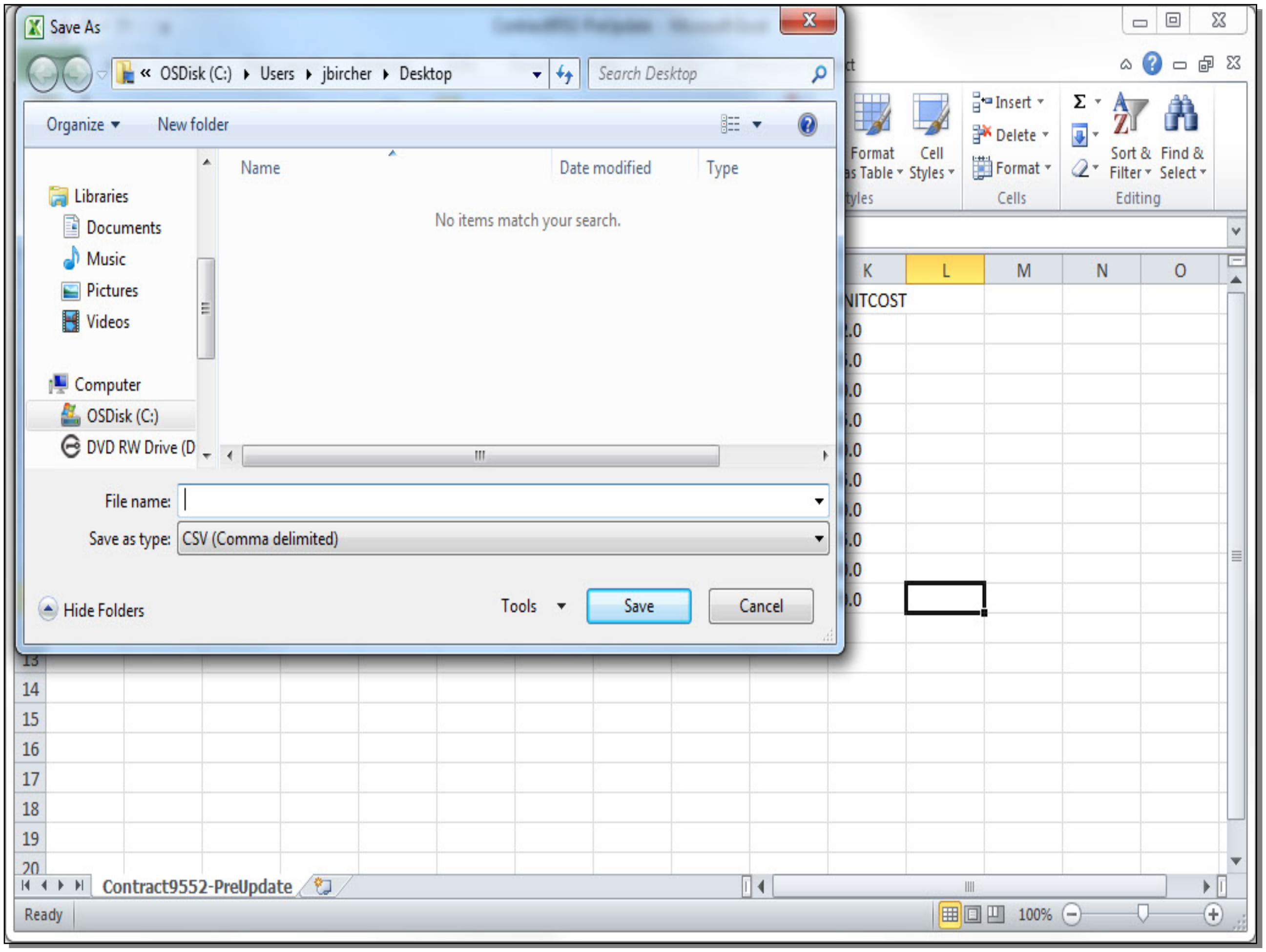
Slide 163 - Demo



Slide notes

Text Captions

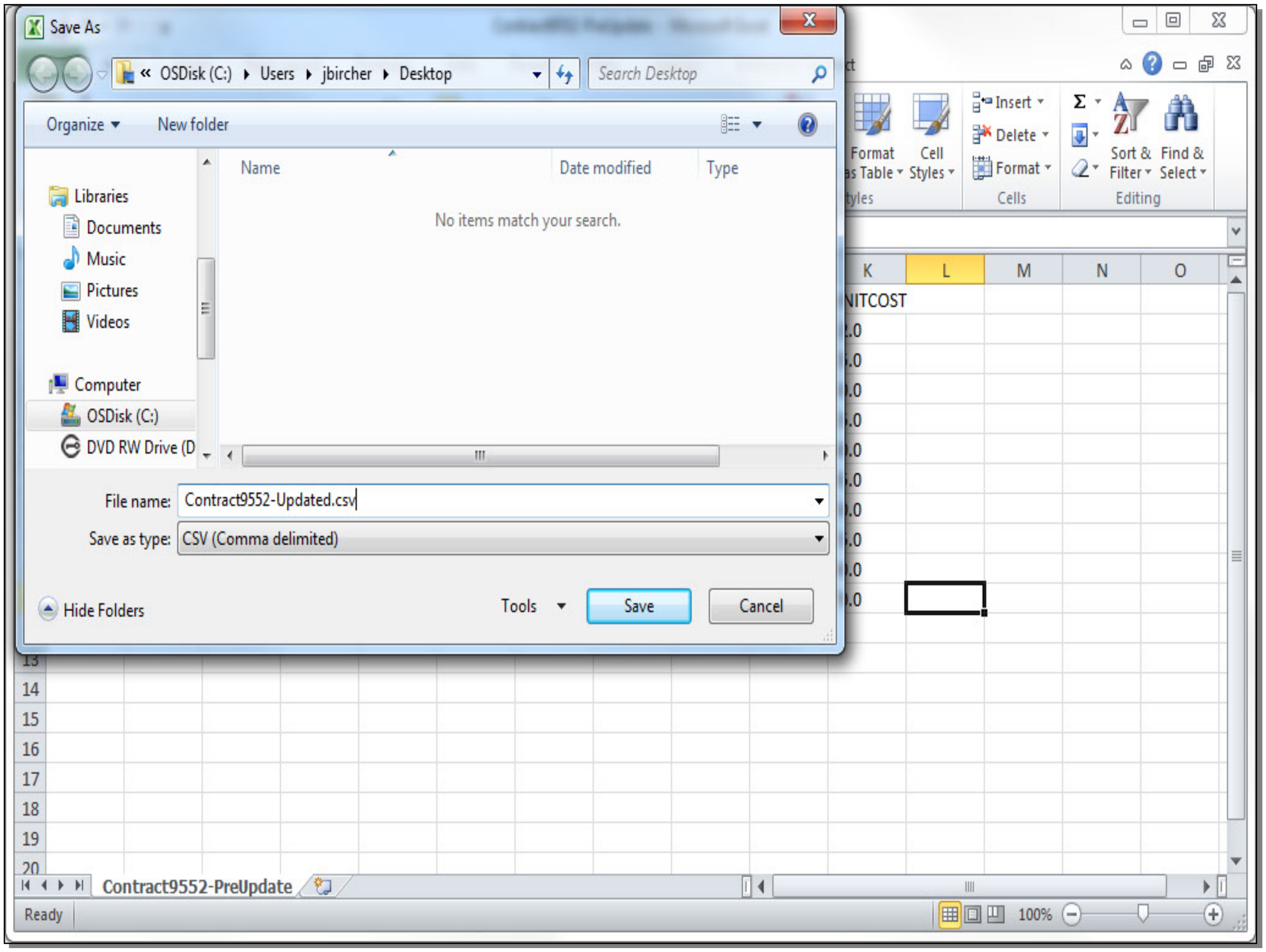
Slide 164 - Demo



Slide notes

Text Captions

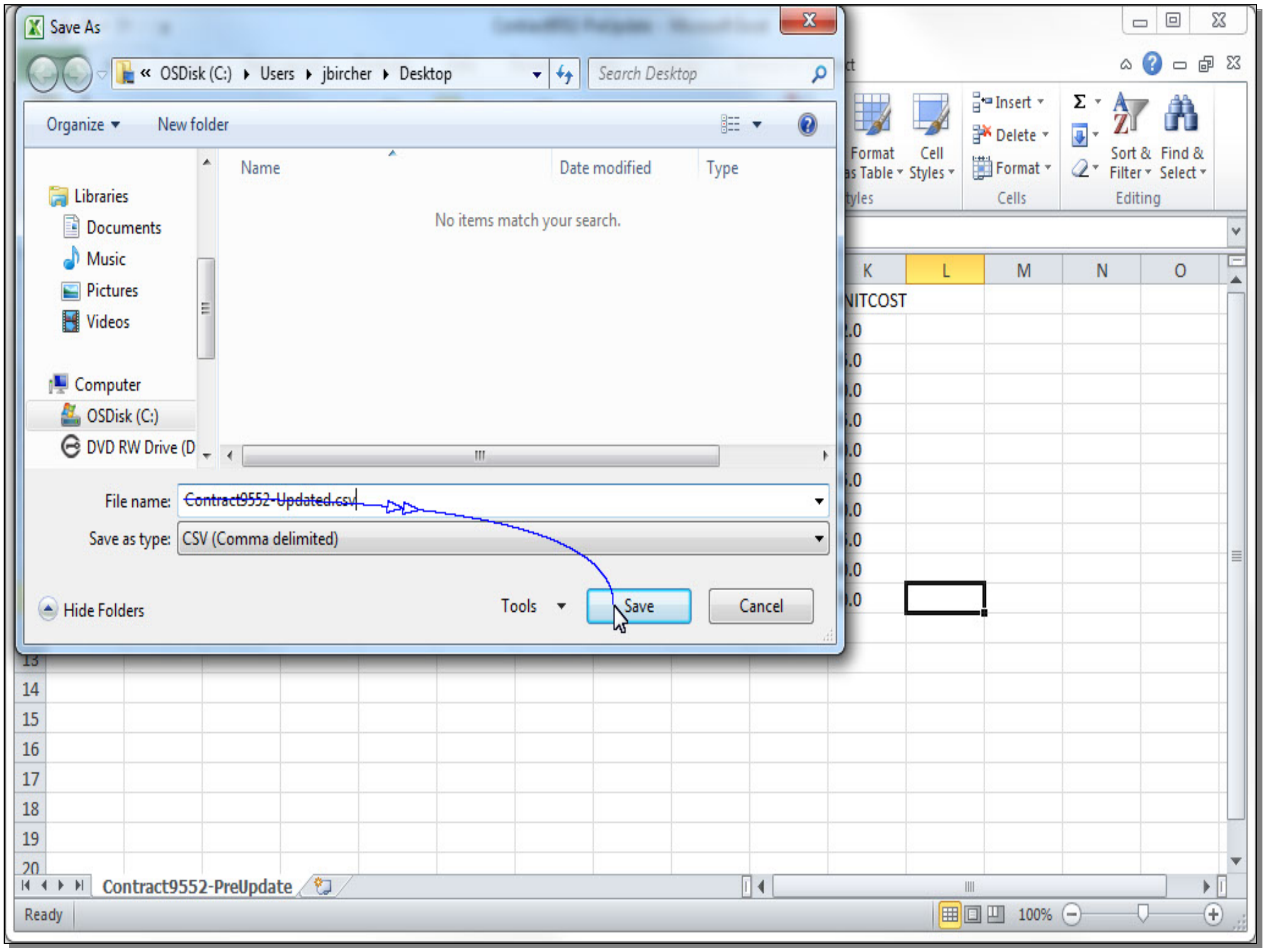
Slide 165 - Demo



Slide notes

Text Captions

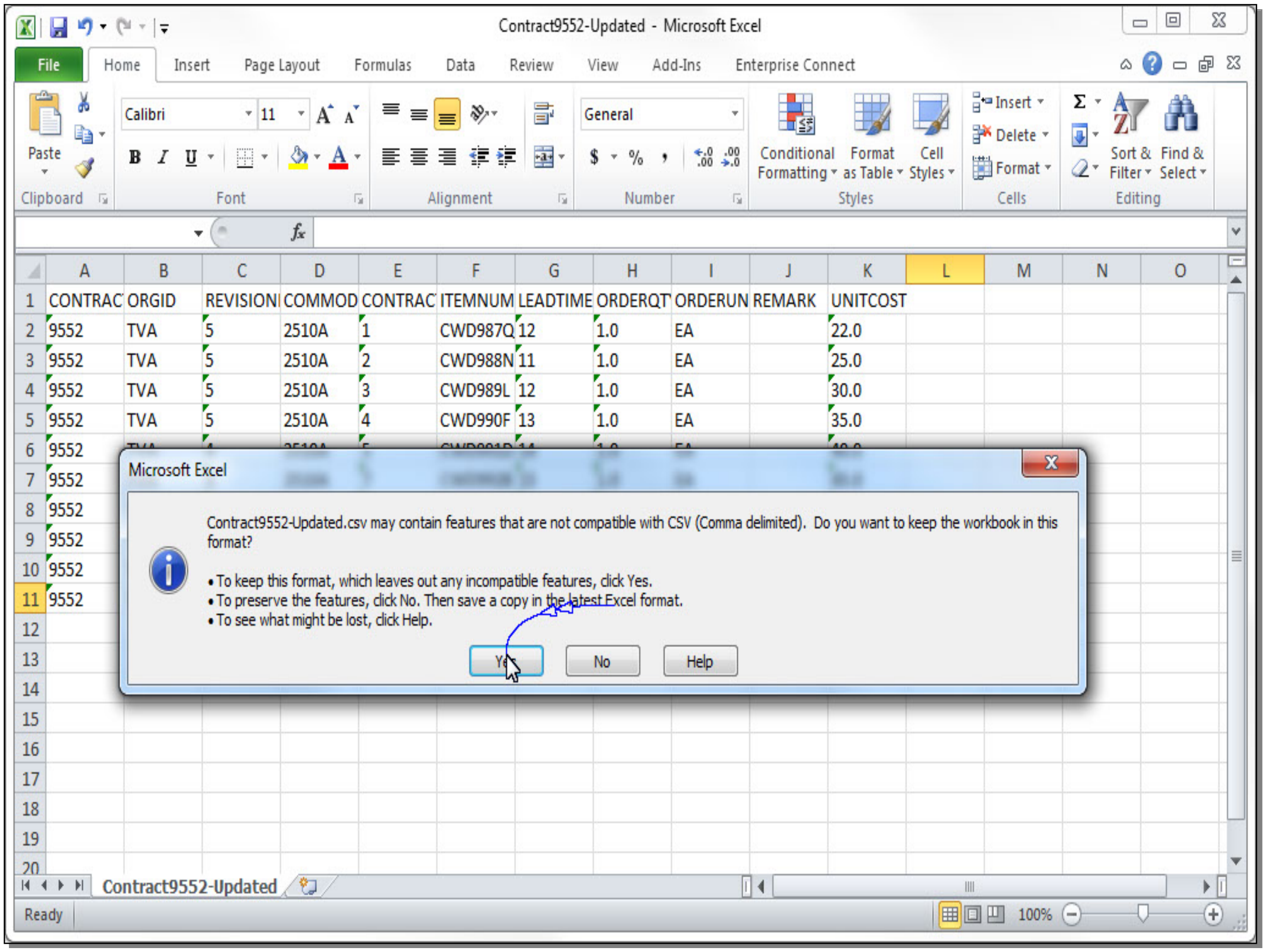
Slide 166 - Demo



Slide notes

Text Captions

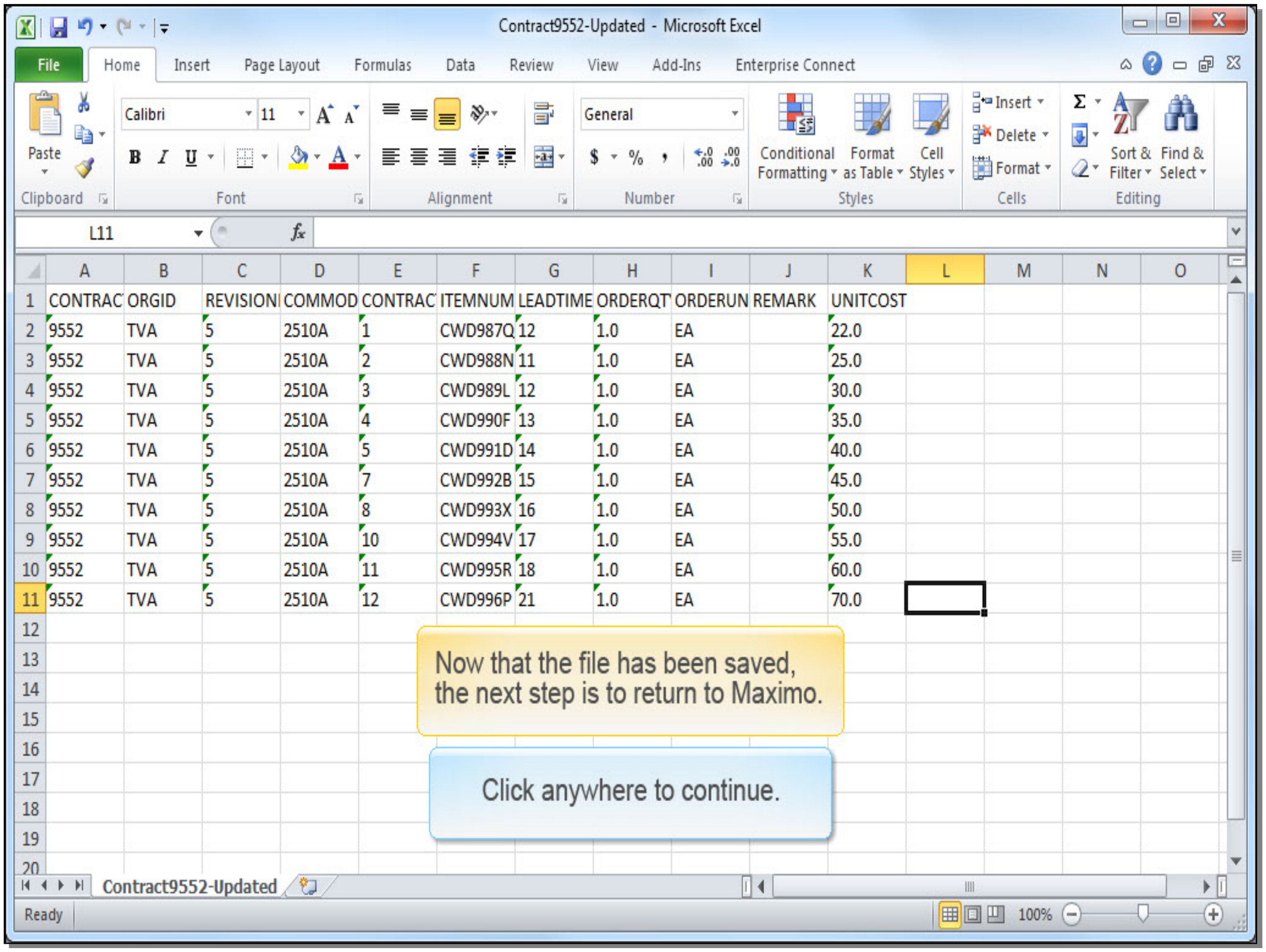
Slide 167 - Demo



Slide notes

Text Captions

Slide 168 - Demo



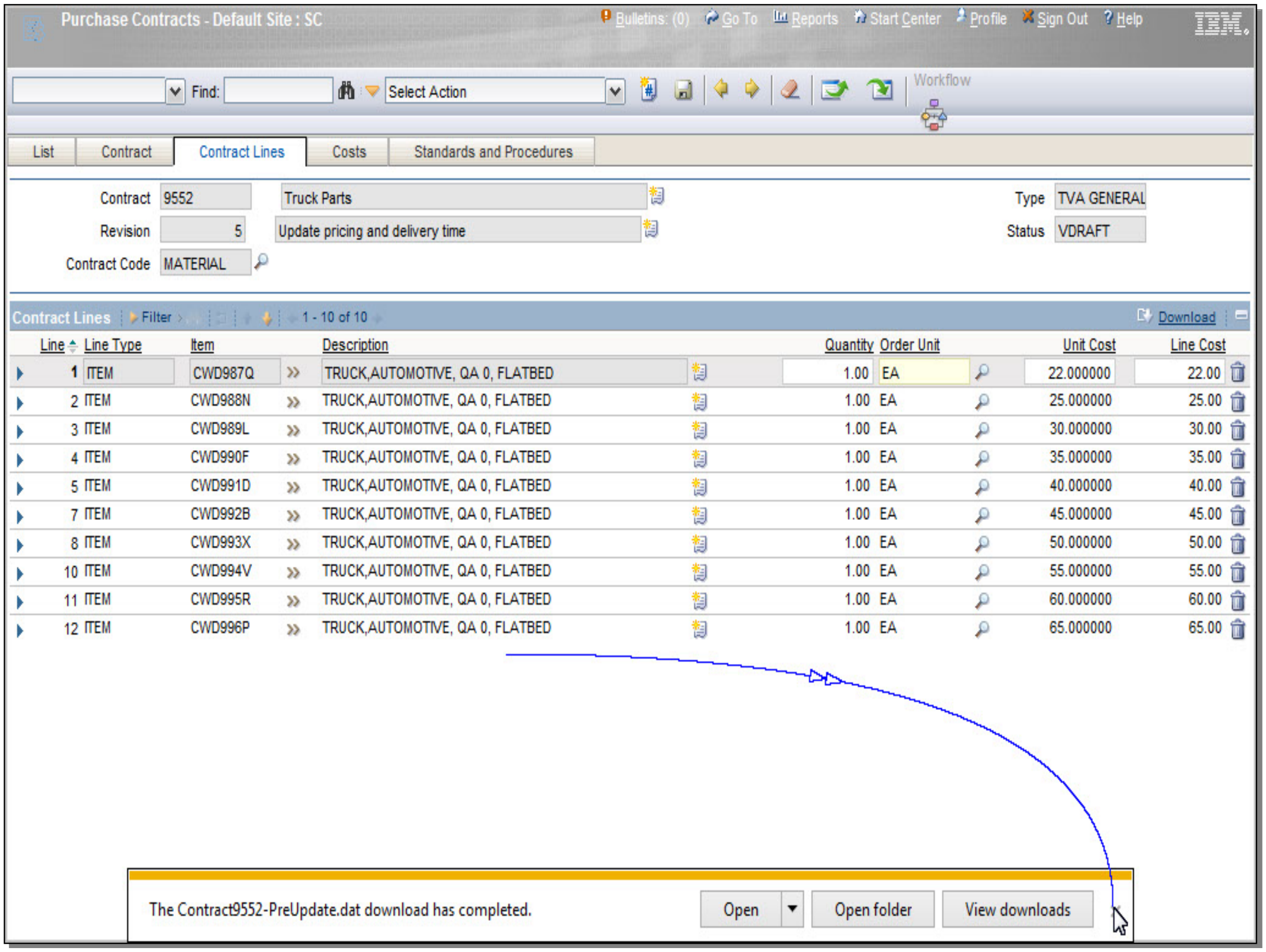
Slide notes

Text Captions

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

Click anywhere to continue.

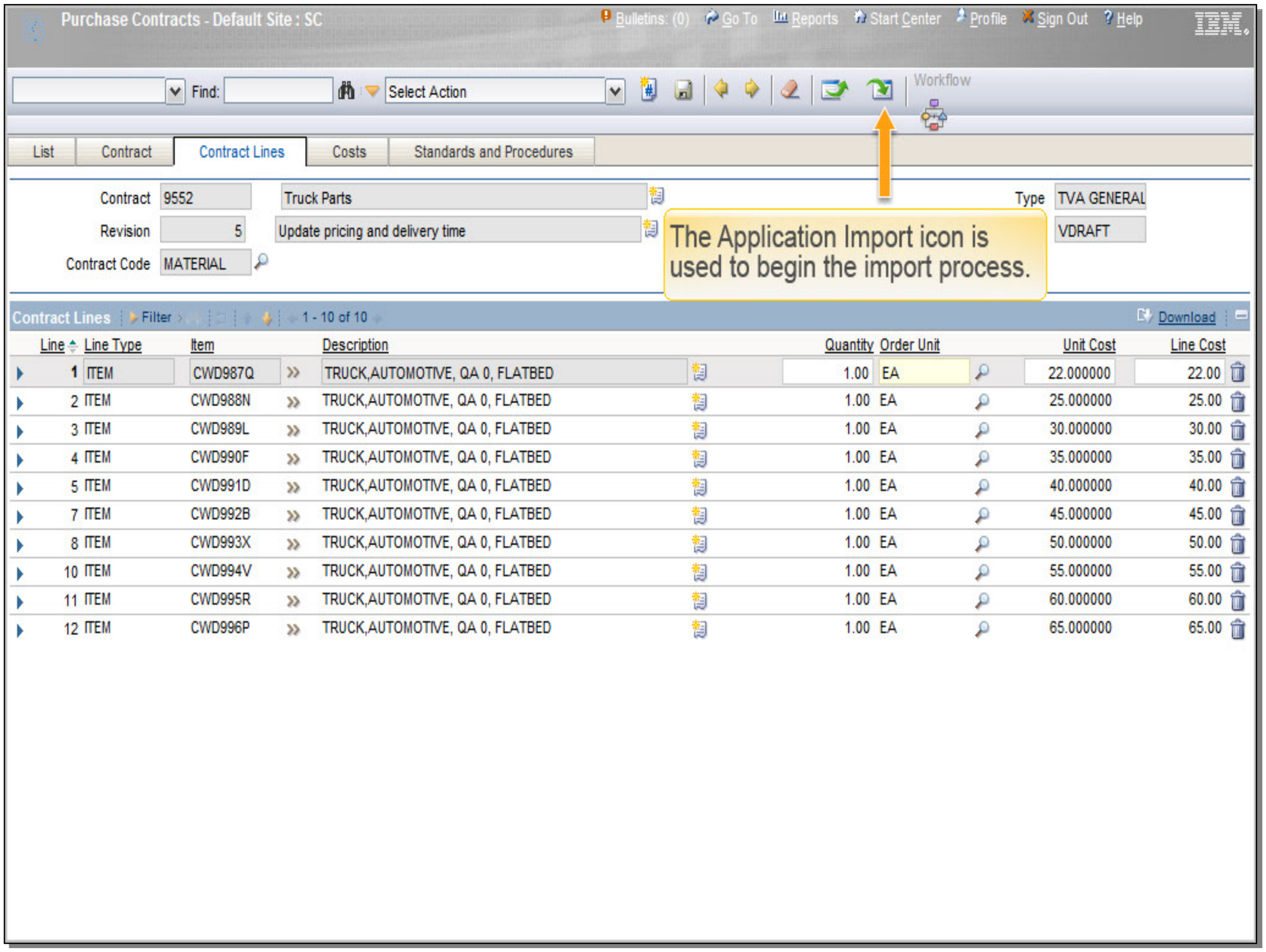
Slide 169 - Demo



Slide notes

Text Captions

Slide 170 - Demo

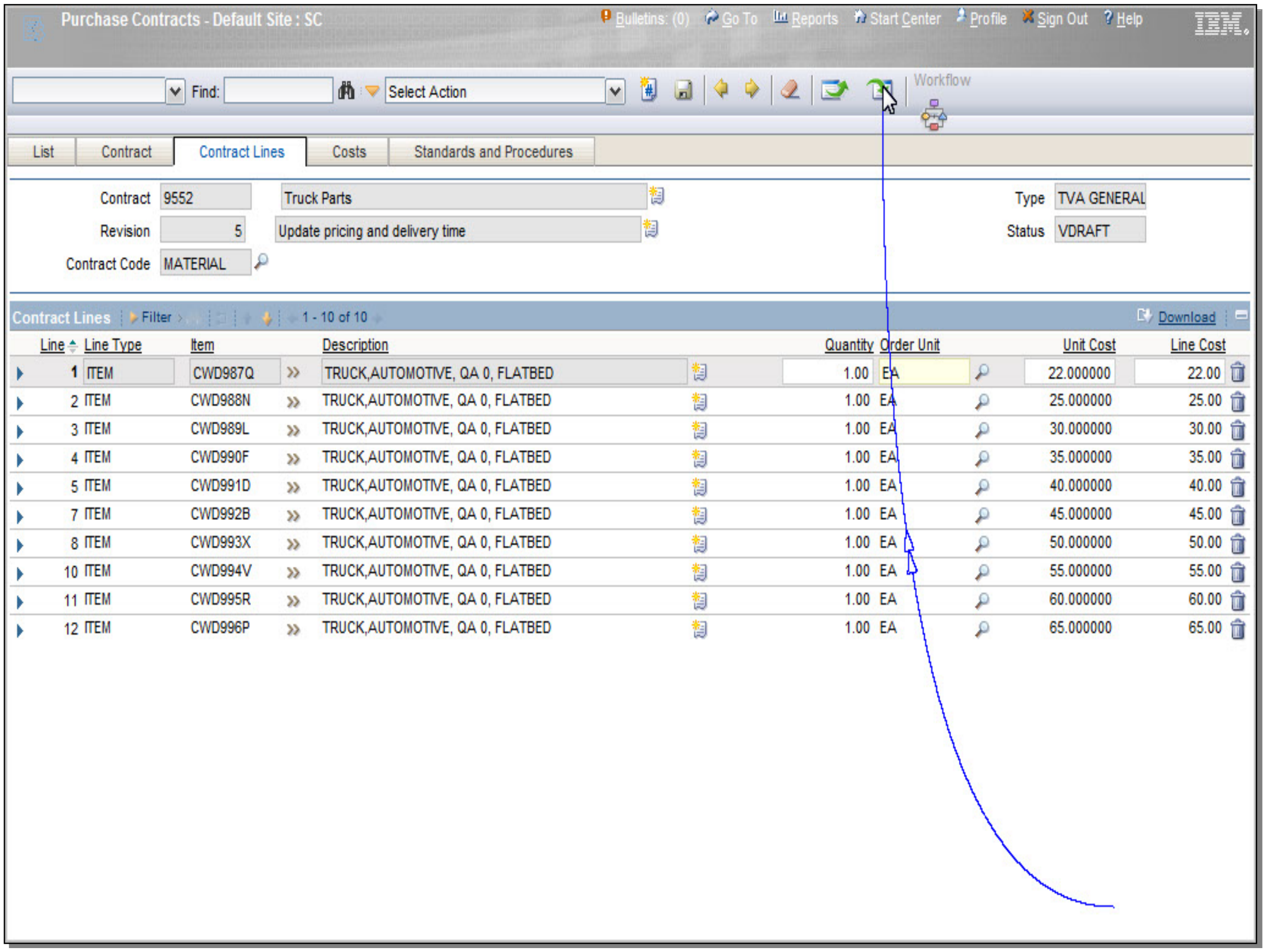


Slide notes

Text Captions

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

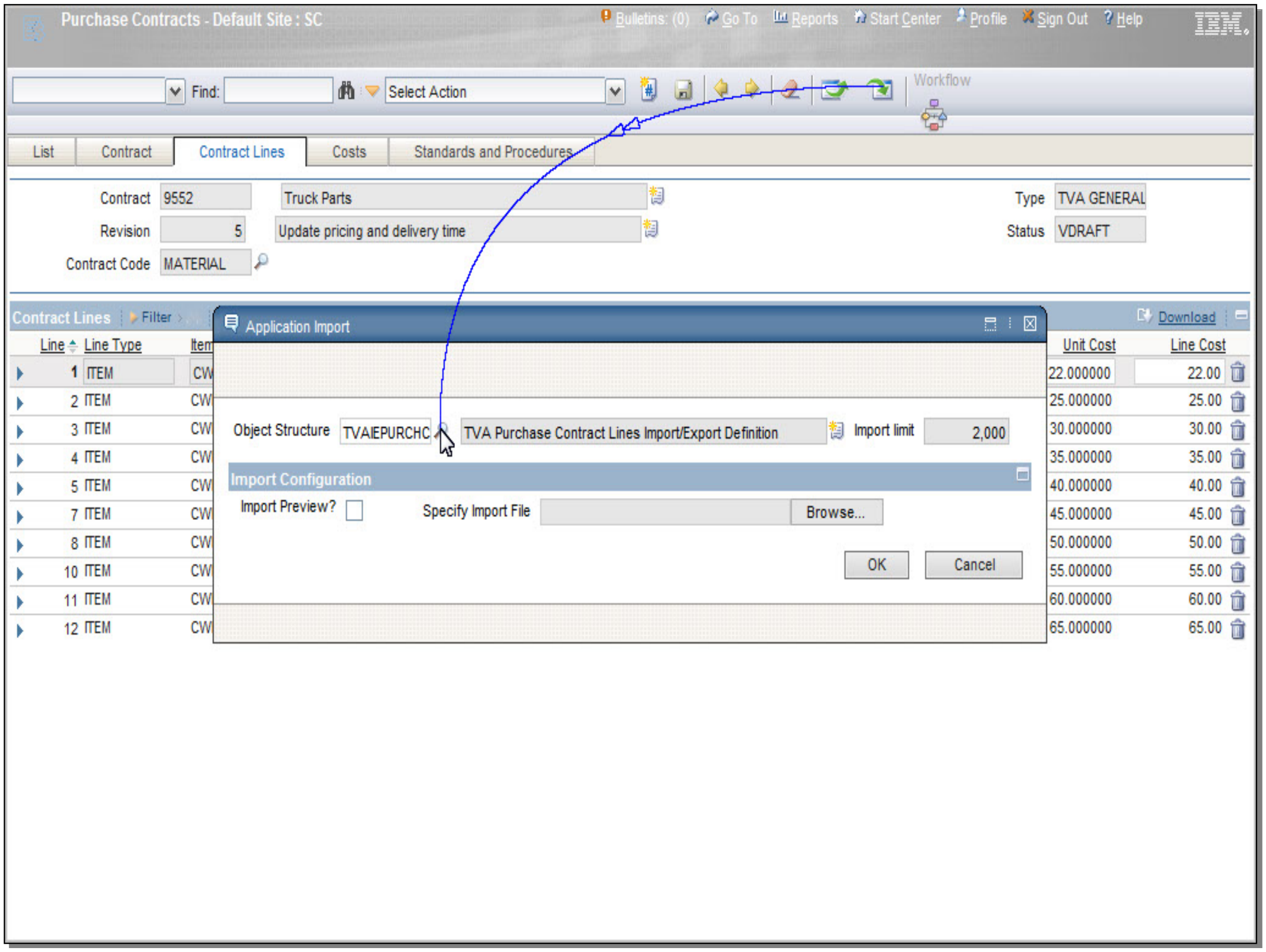
Slide 171 - Demo



Slide notes

Text Captions

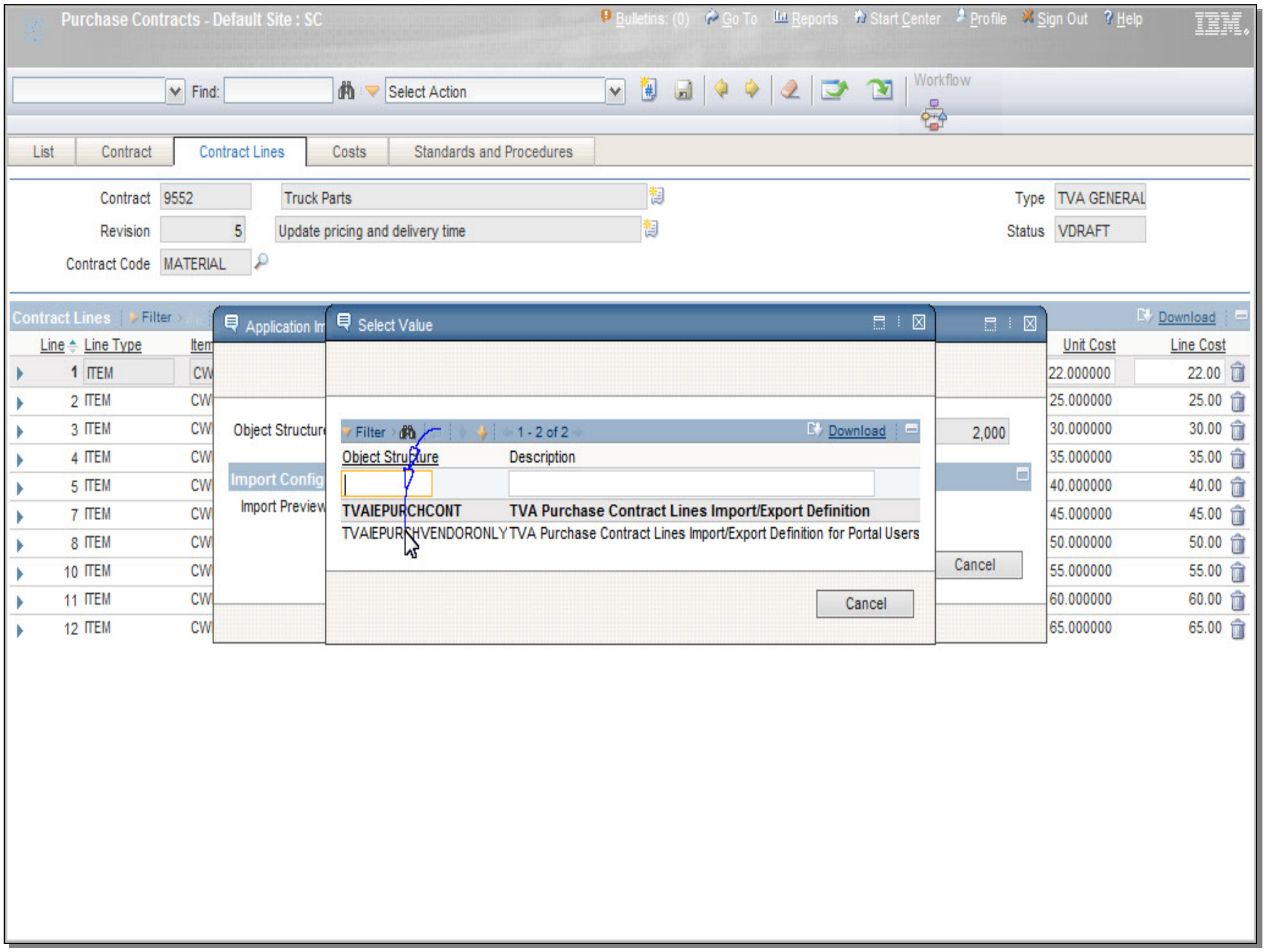
Slide 172 - Demo



Slide notes

Text Captions

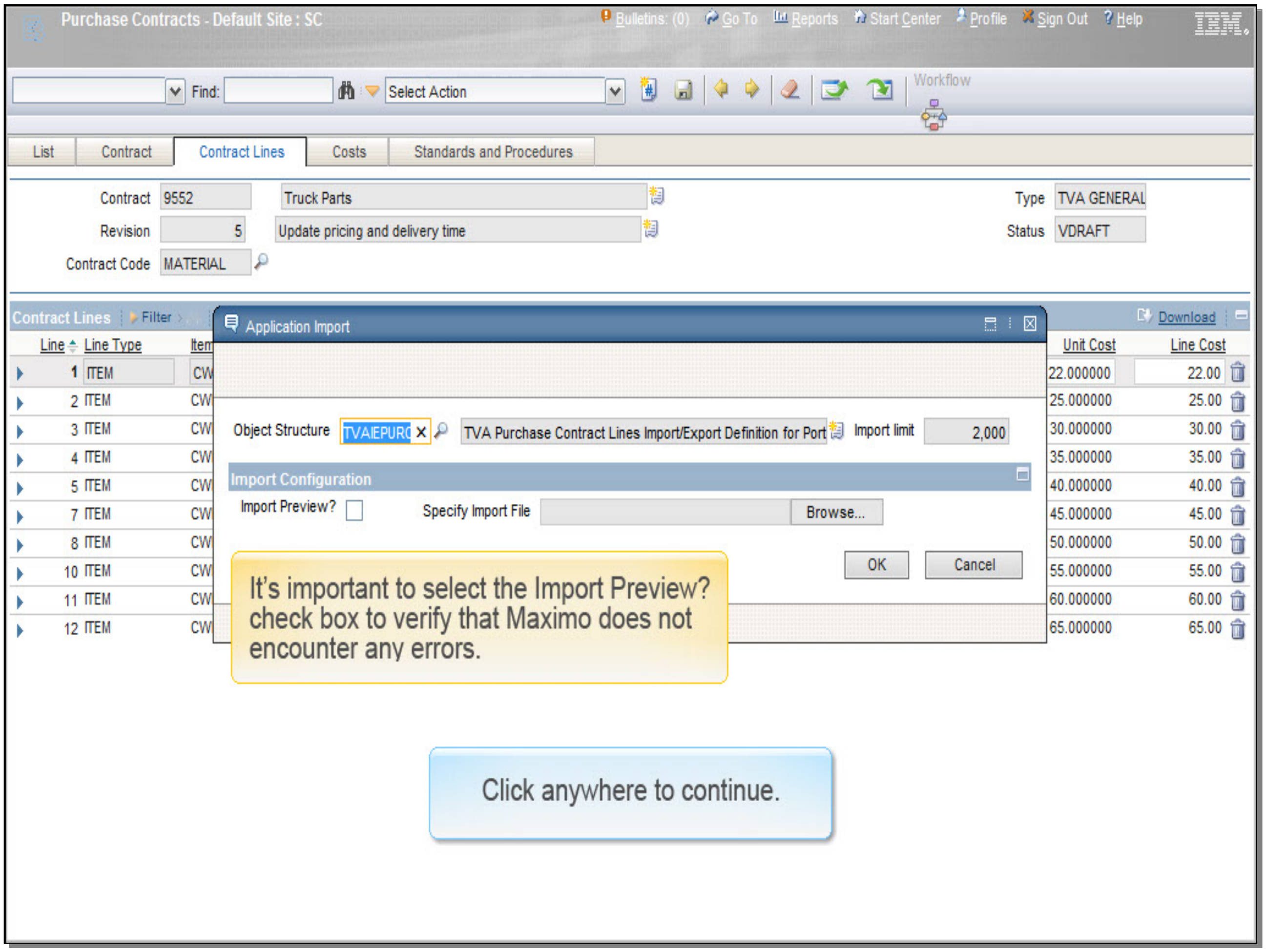
Slide 173 - Demo



Slide notes

Text Captions

Slide 174 - Demo



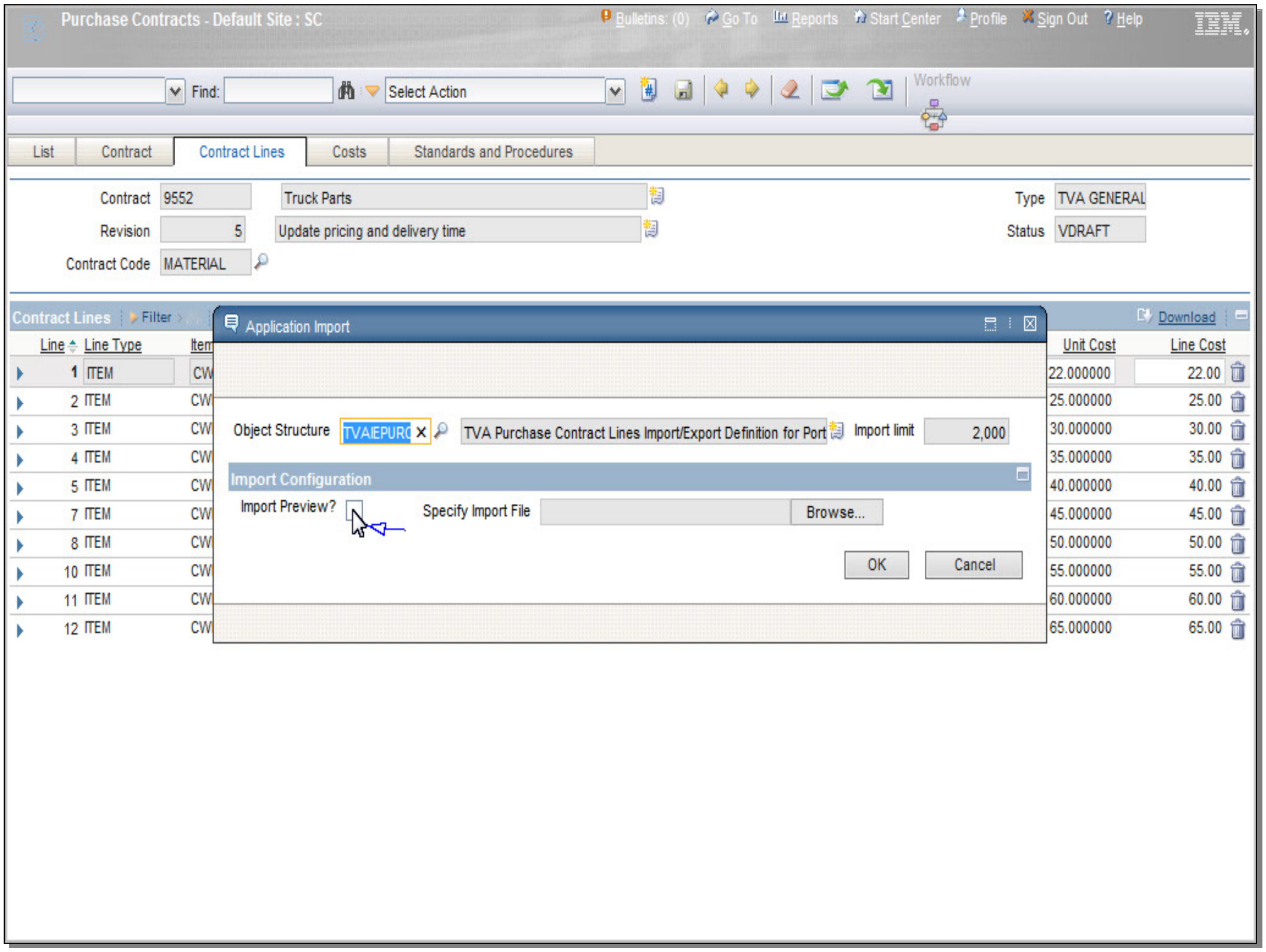
Slide notes

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.

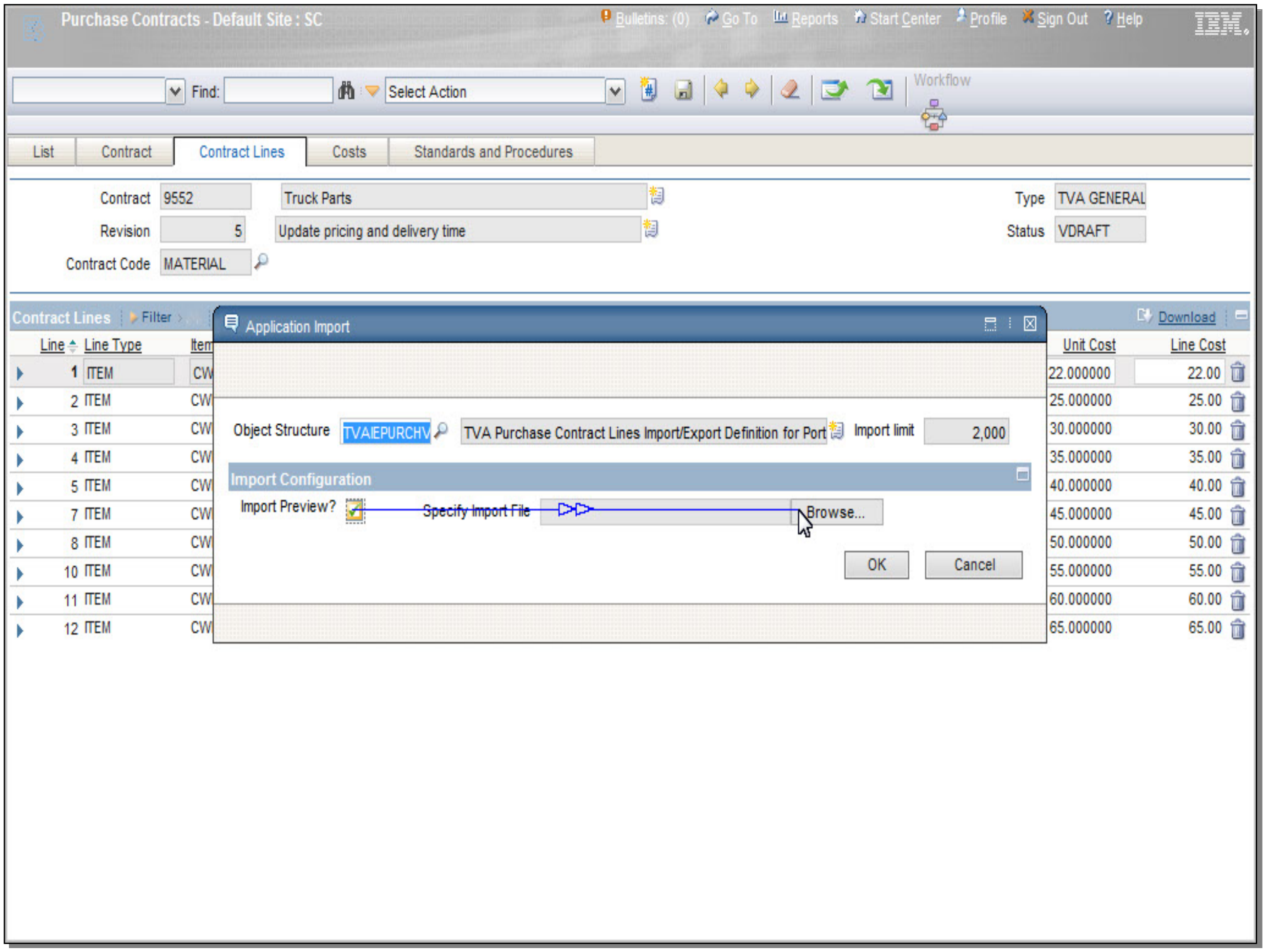
Slide 175 - Demo



Slide notes

Text Captions

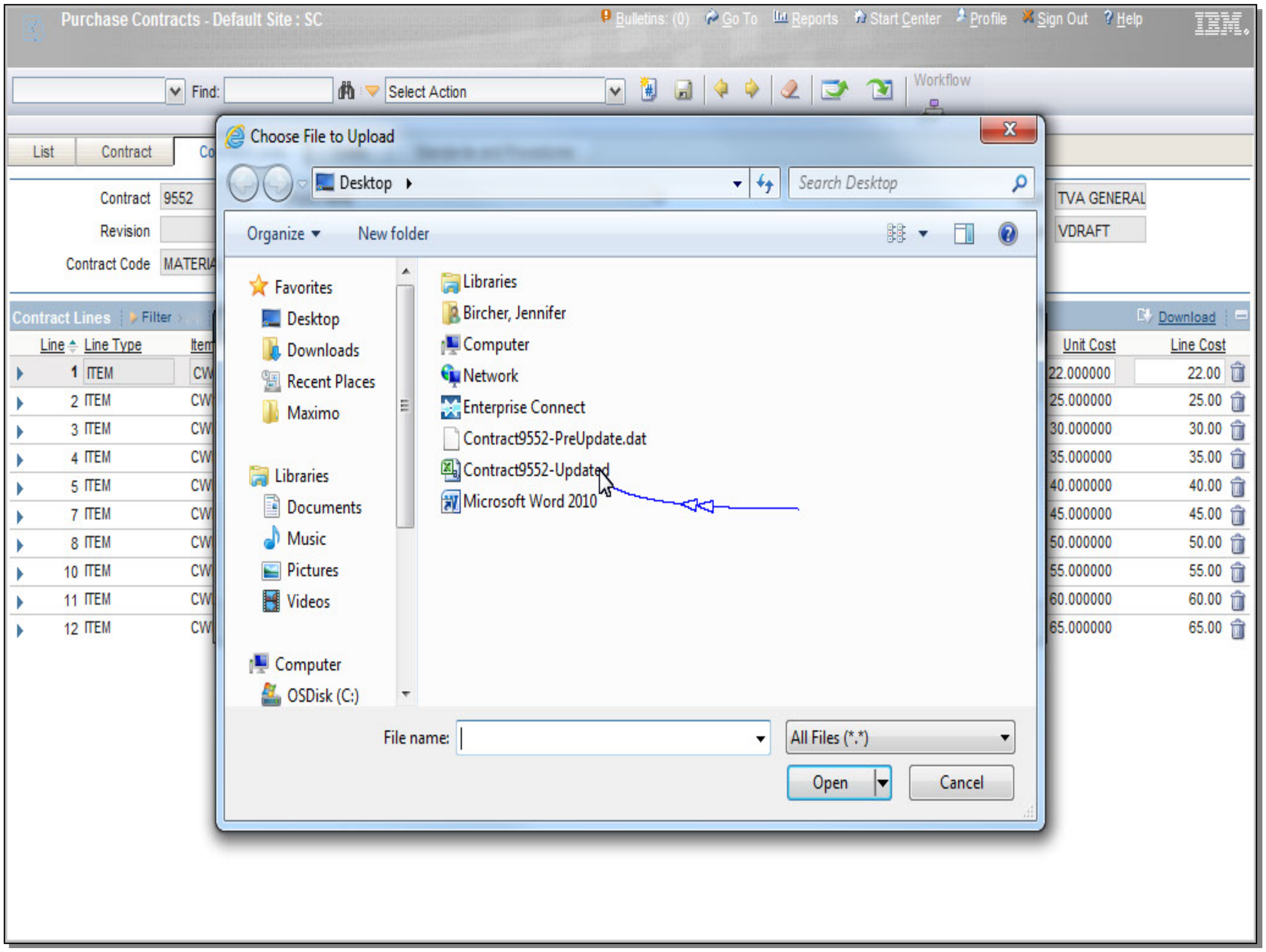
Slide 176 - Demo



Slide notes

Text Captions

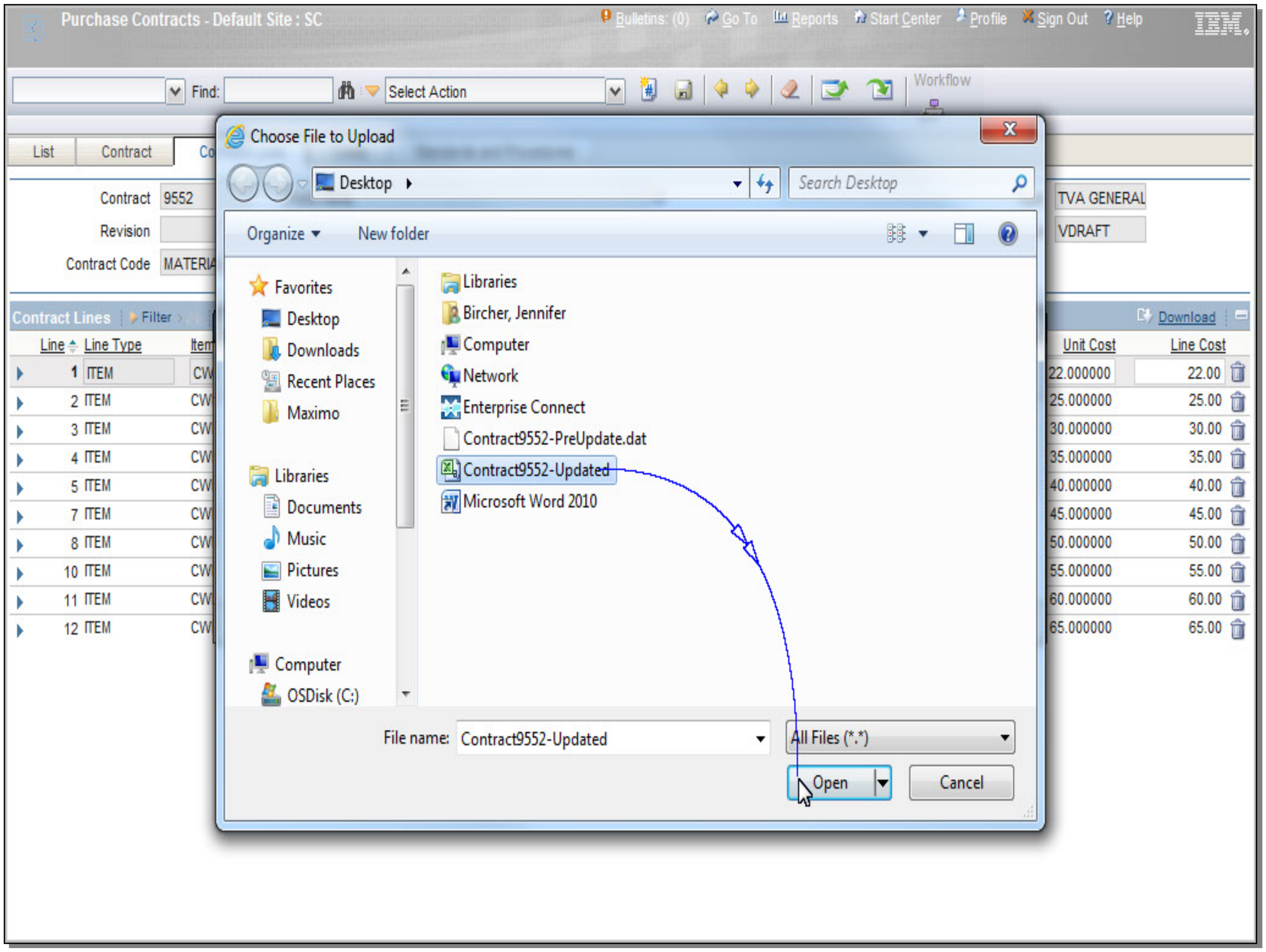
Slide 177 - Demo



Slide notes

Text Captions

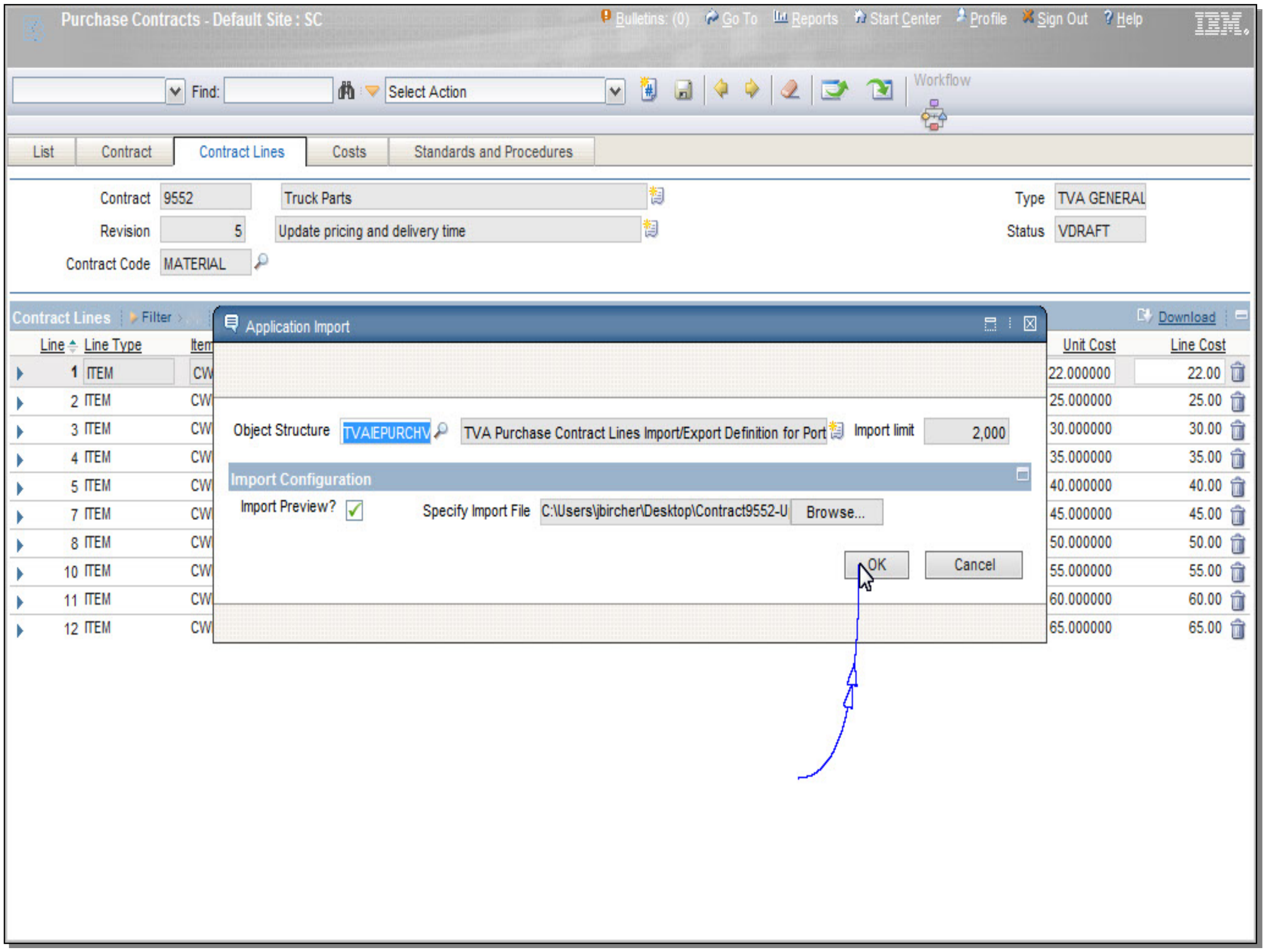
Slide 178 - Demo



Slide notes

Text Captions

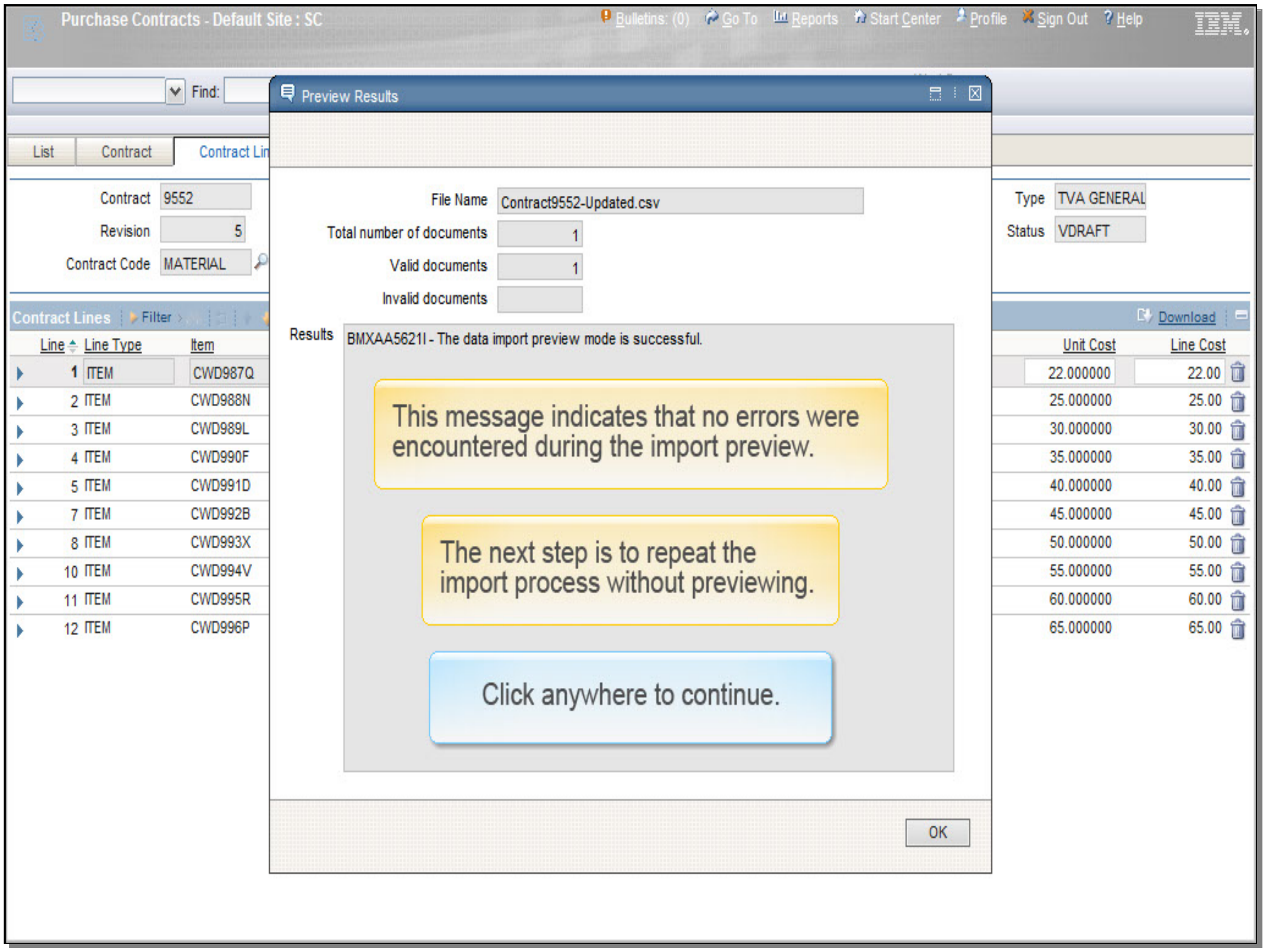
Slide 179 - Demo



Slide notes

Text Captions

Slide 180 - Demo



Slide notes

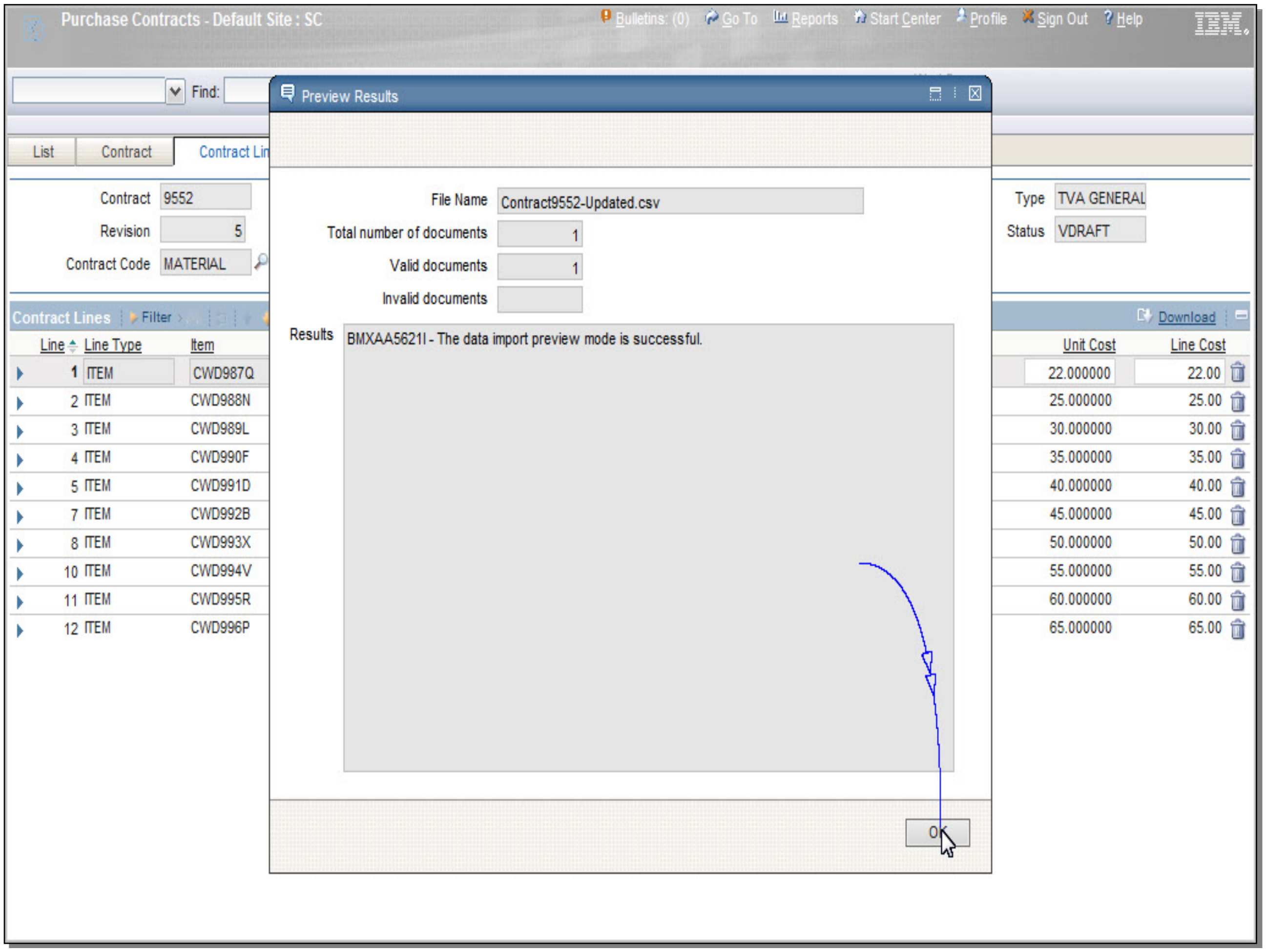
Text Captions

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.

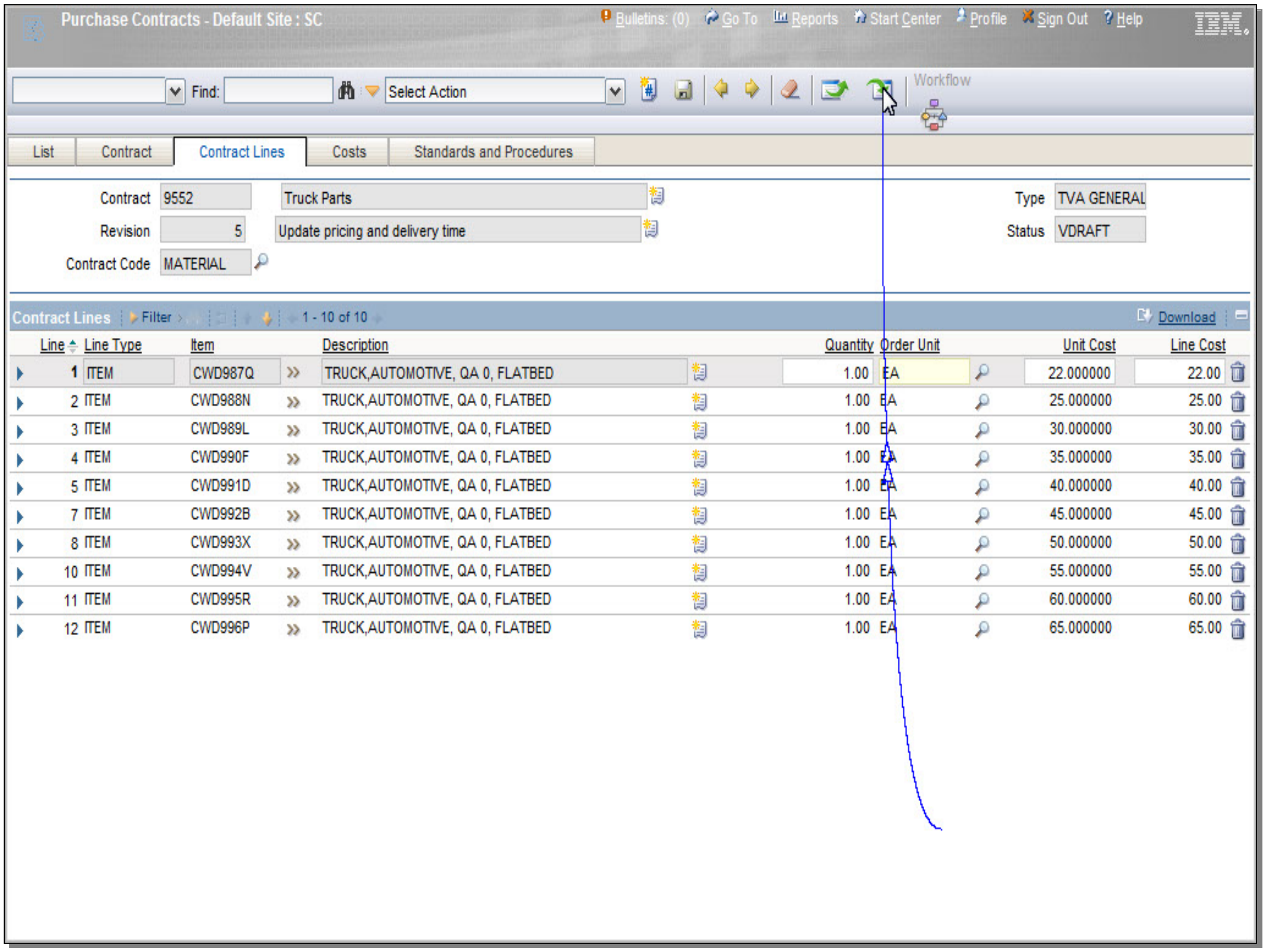
Slide 181 - Demo



Slide notes

Text Captions

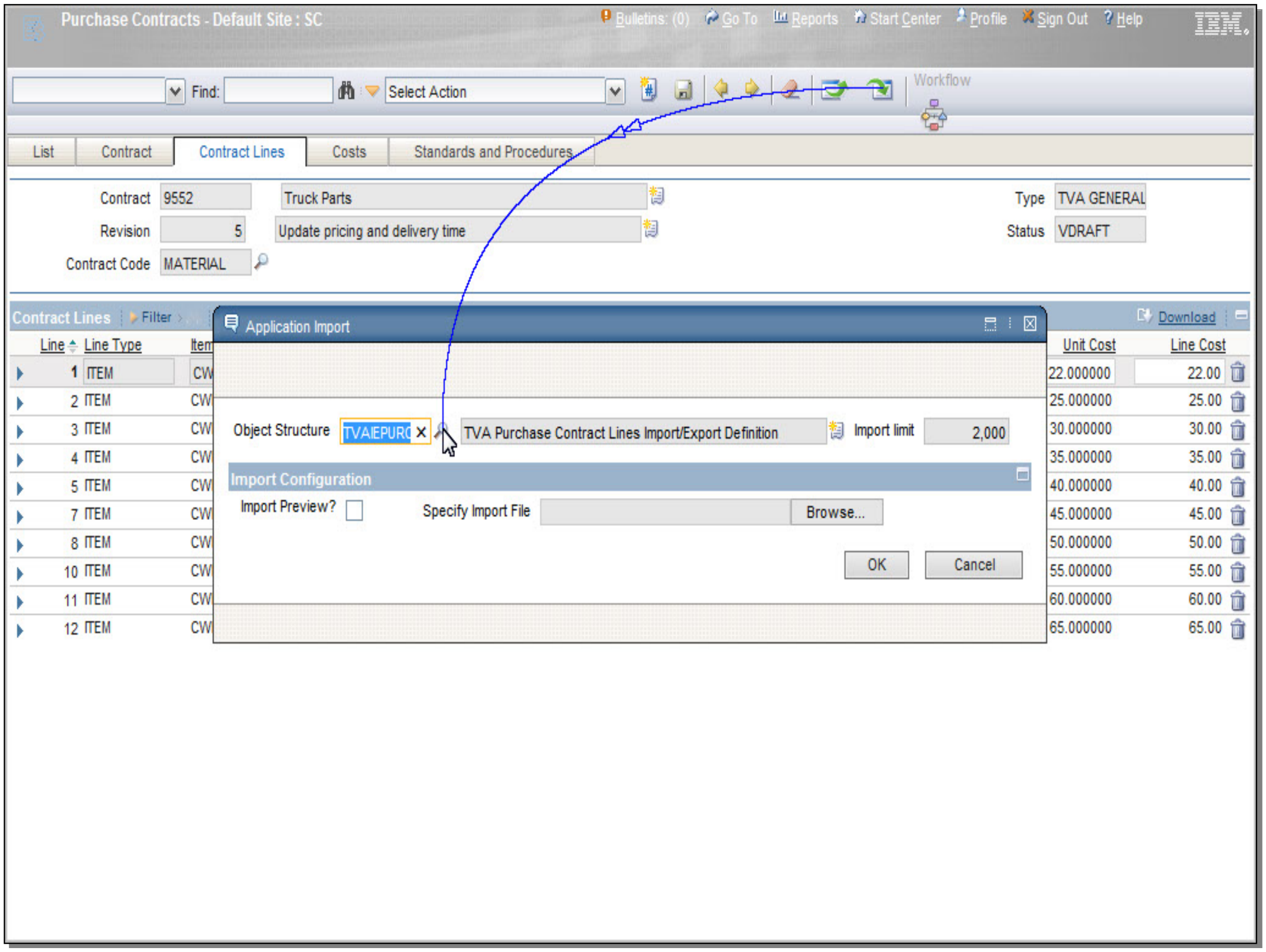
Slide 182 - Demo



Slide notes

Text Captions

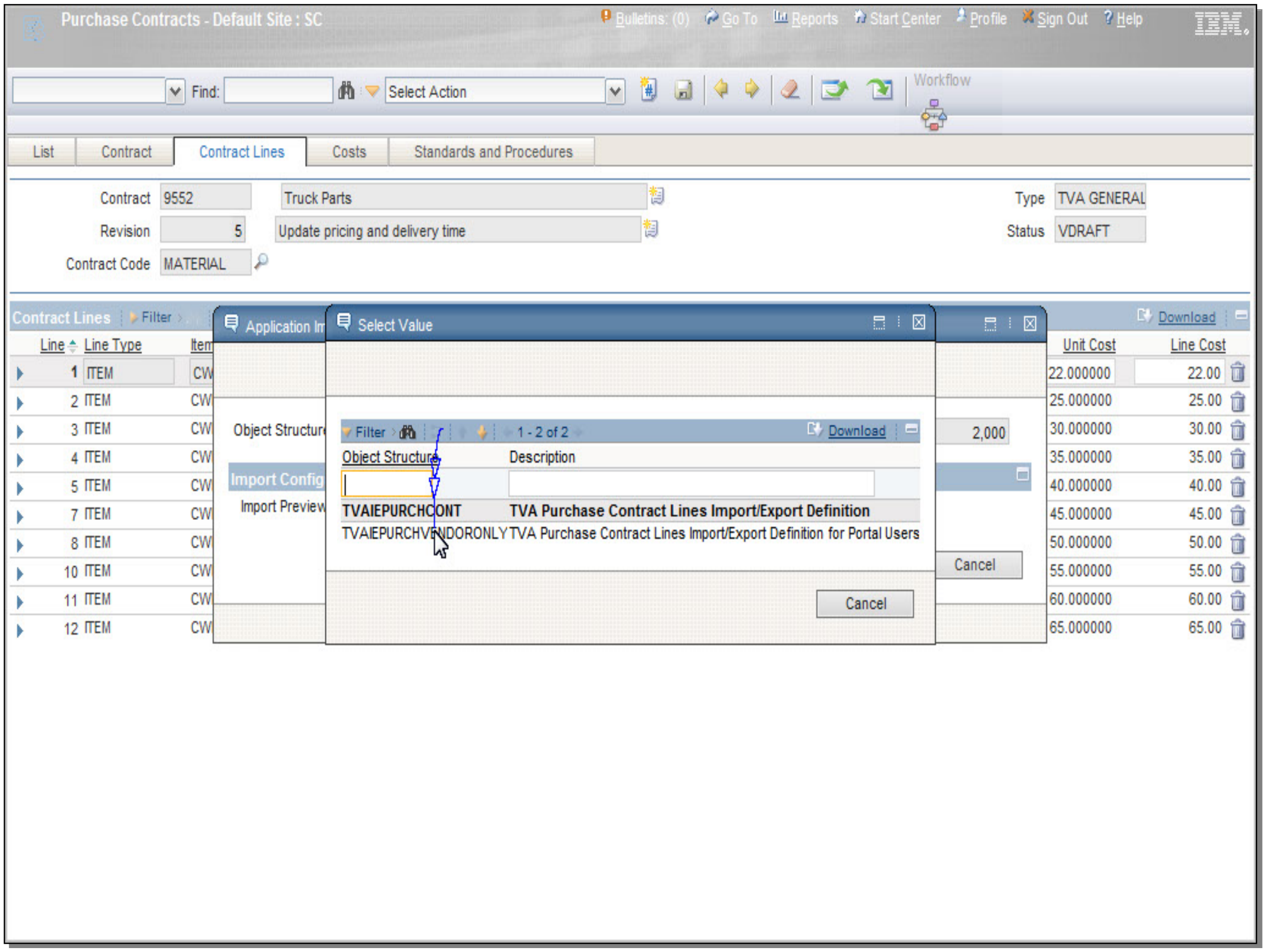
Slide 183 - Demo



Slide notes

Text Captions

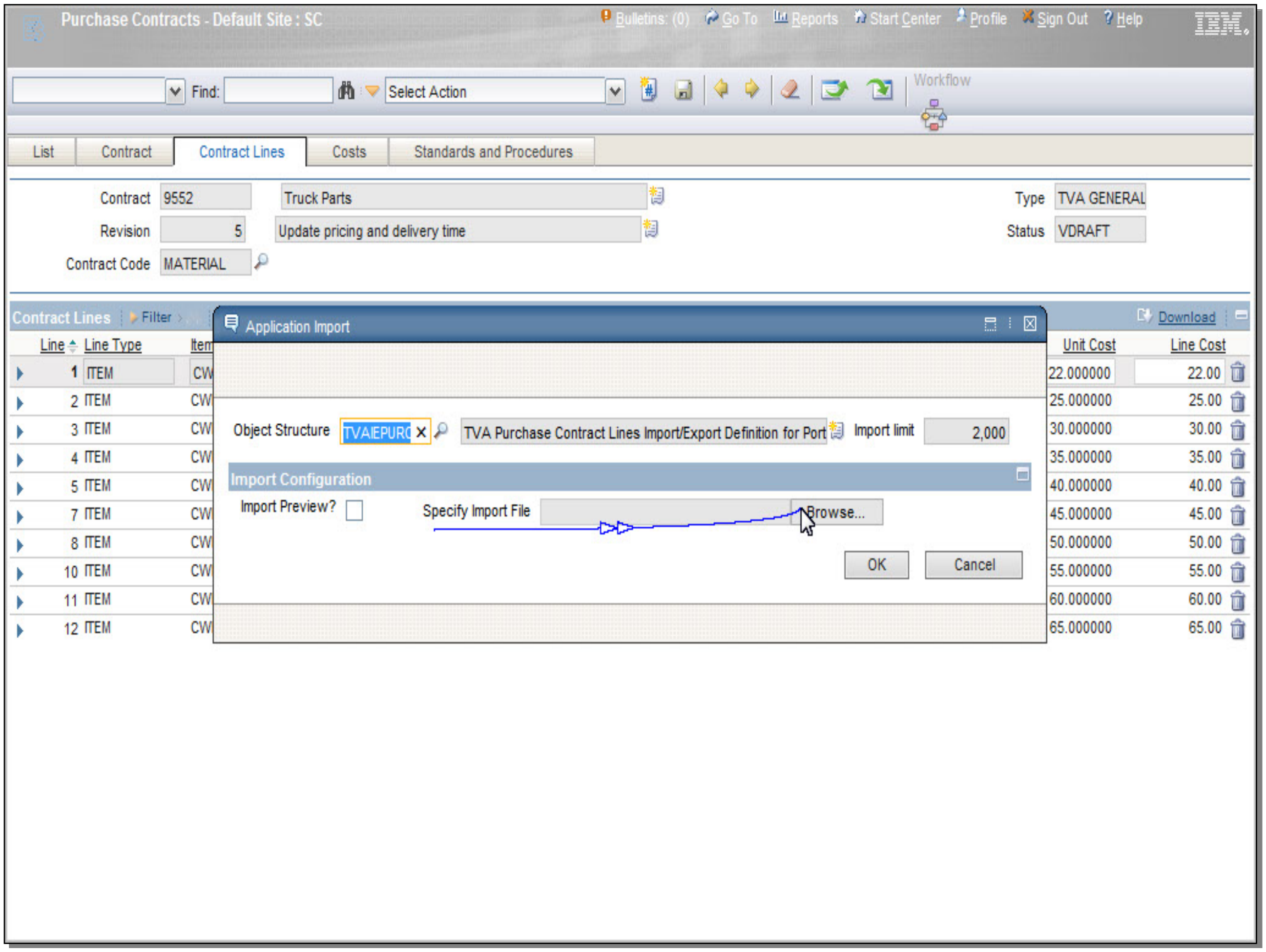
Slide 184 - Demo



Slide notes

Text Captions

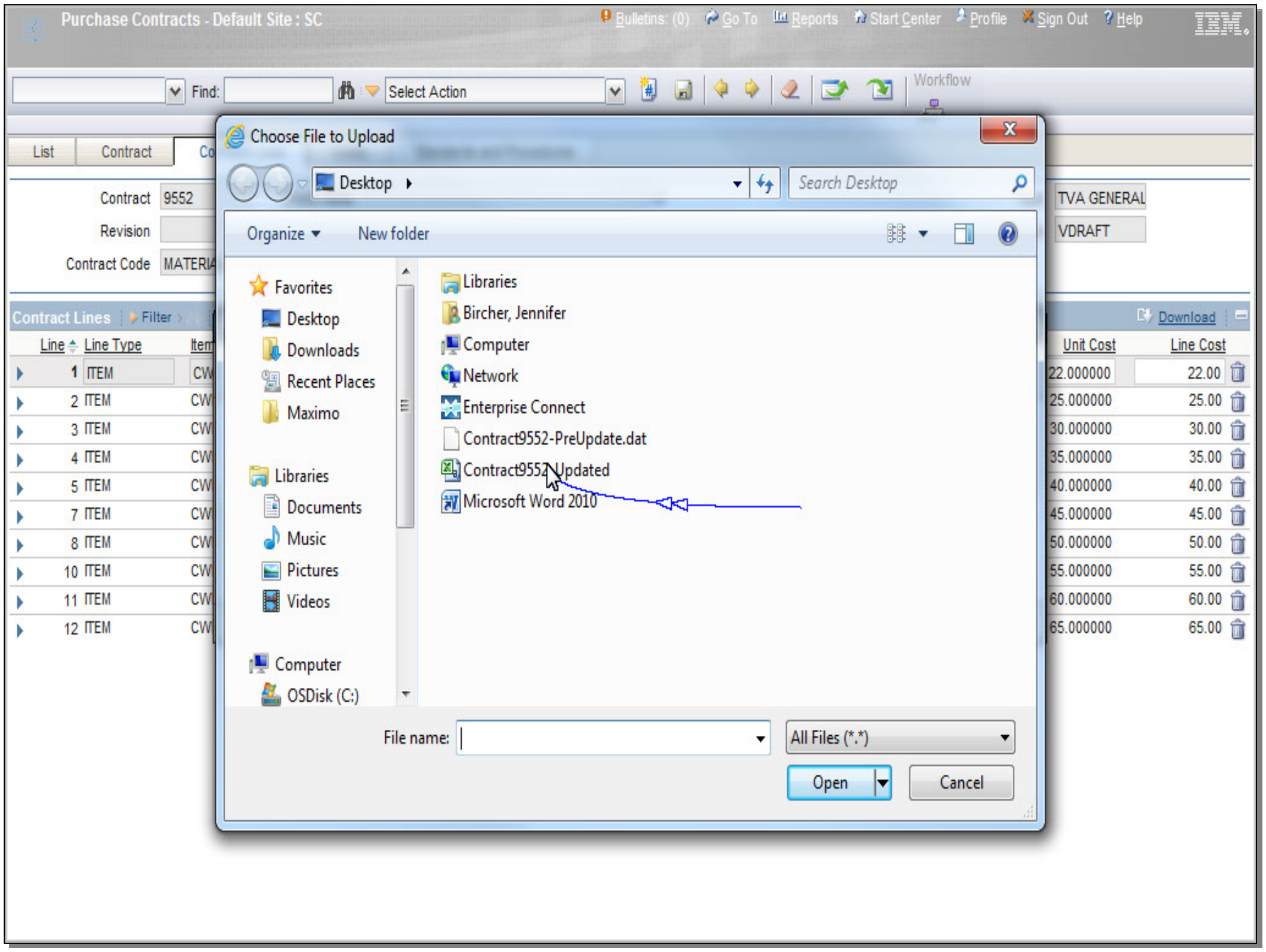
Slide 185 - Demo



Slide notes

Text Captions

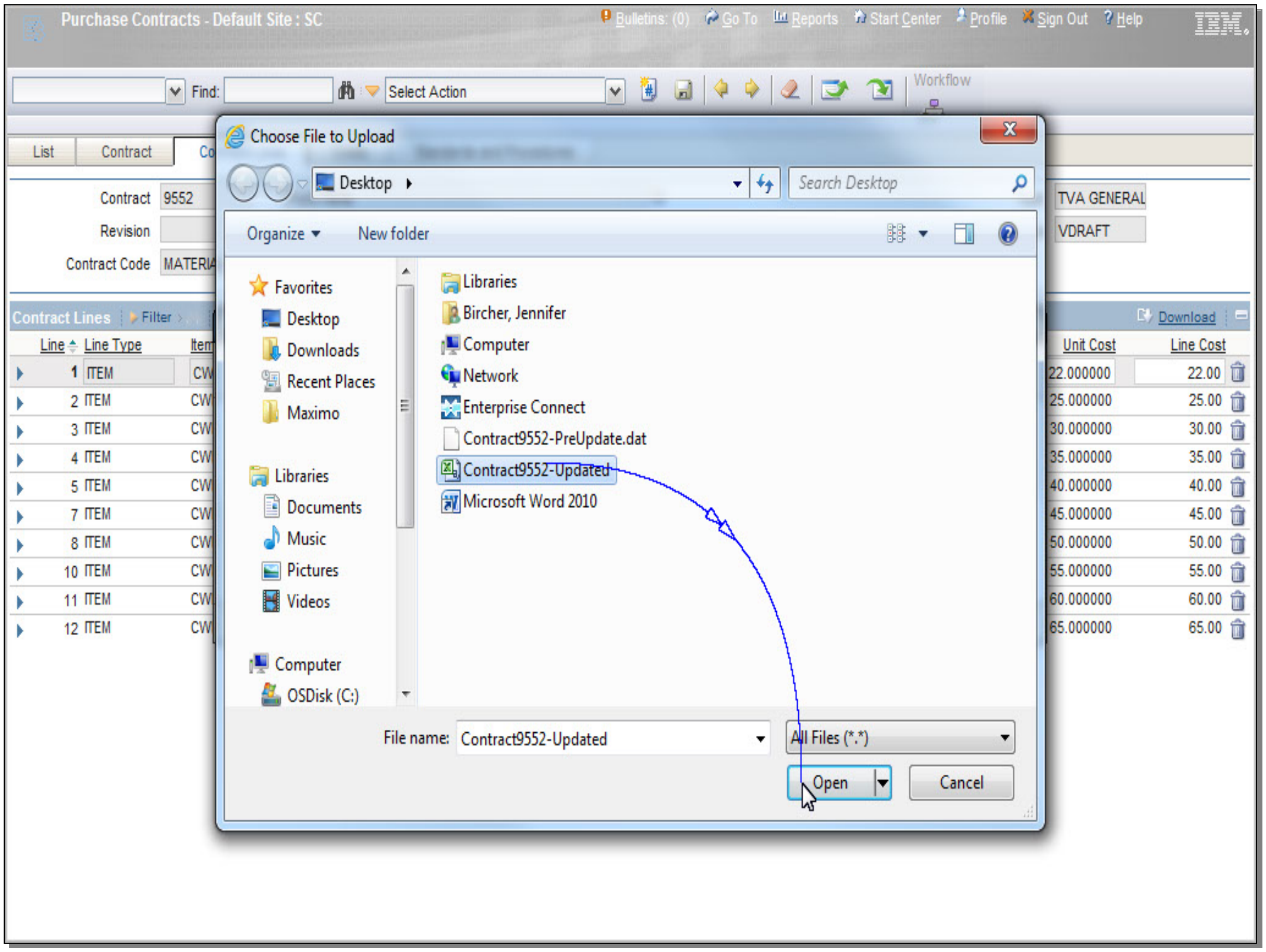
Slide 186 - Demo



Slide notes

Text Captions

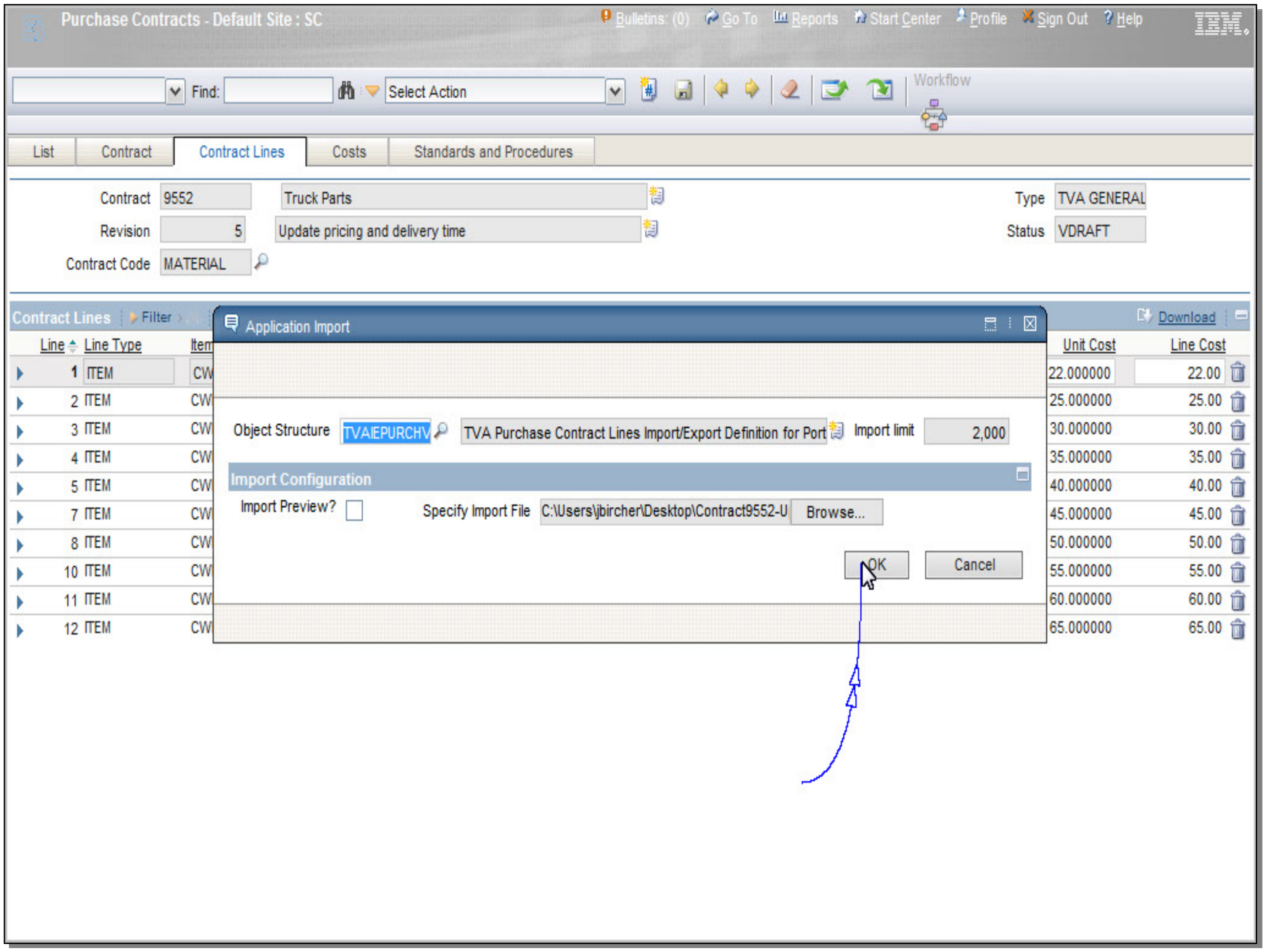
Slide 187 - Demo



Slide notes

Text Captions

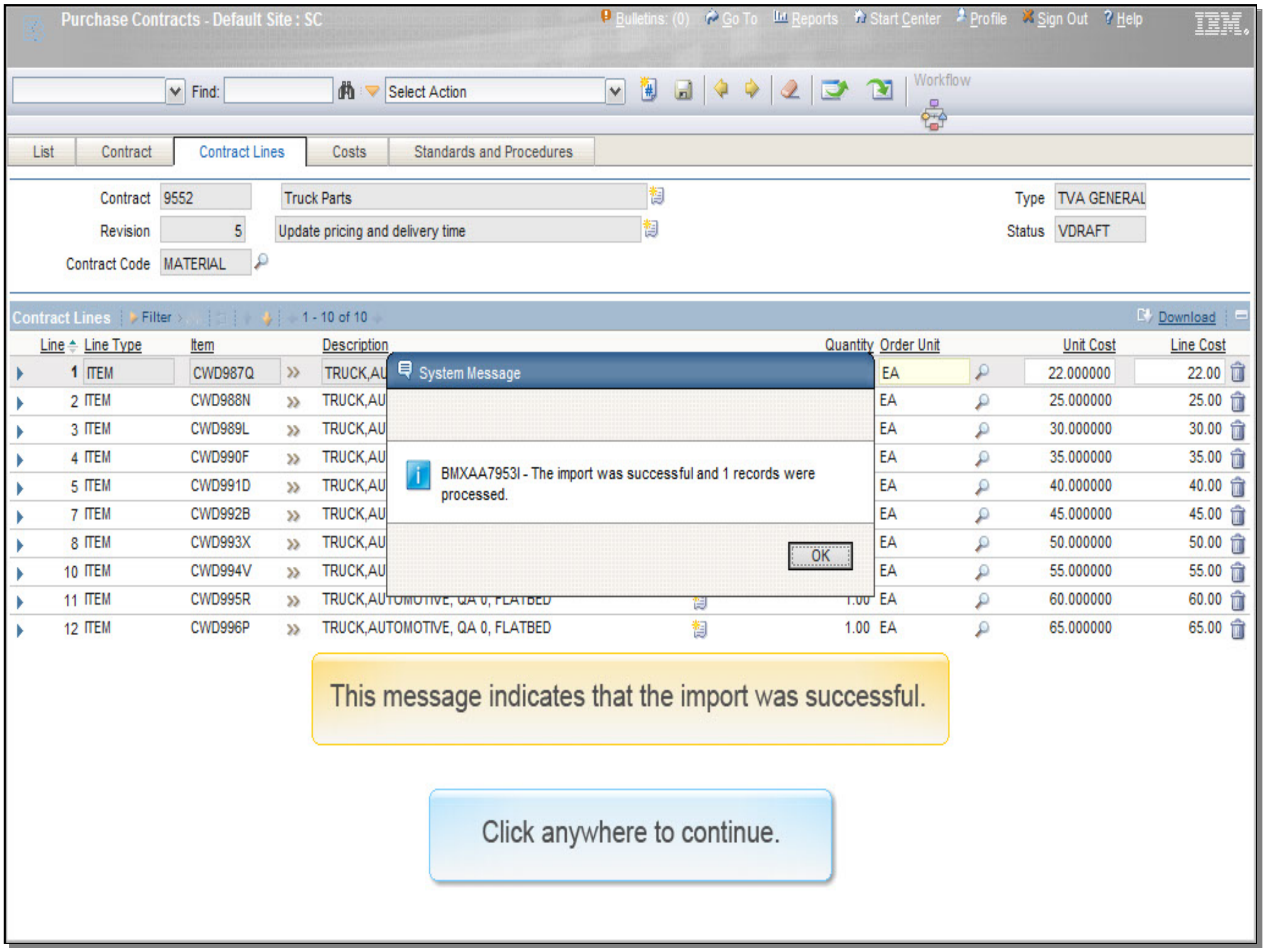
Slide 188 - Demo



Slide notes

Text Captions

Slide 189 - Demo



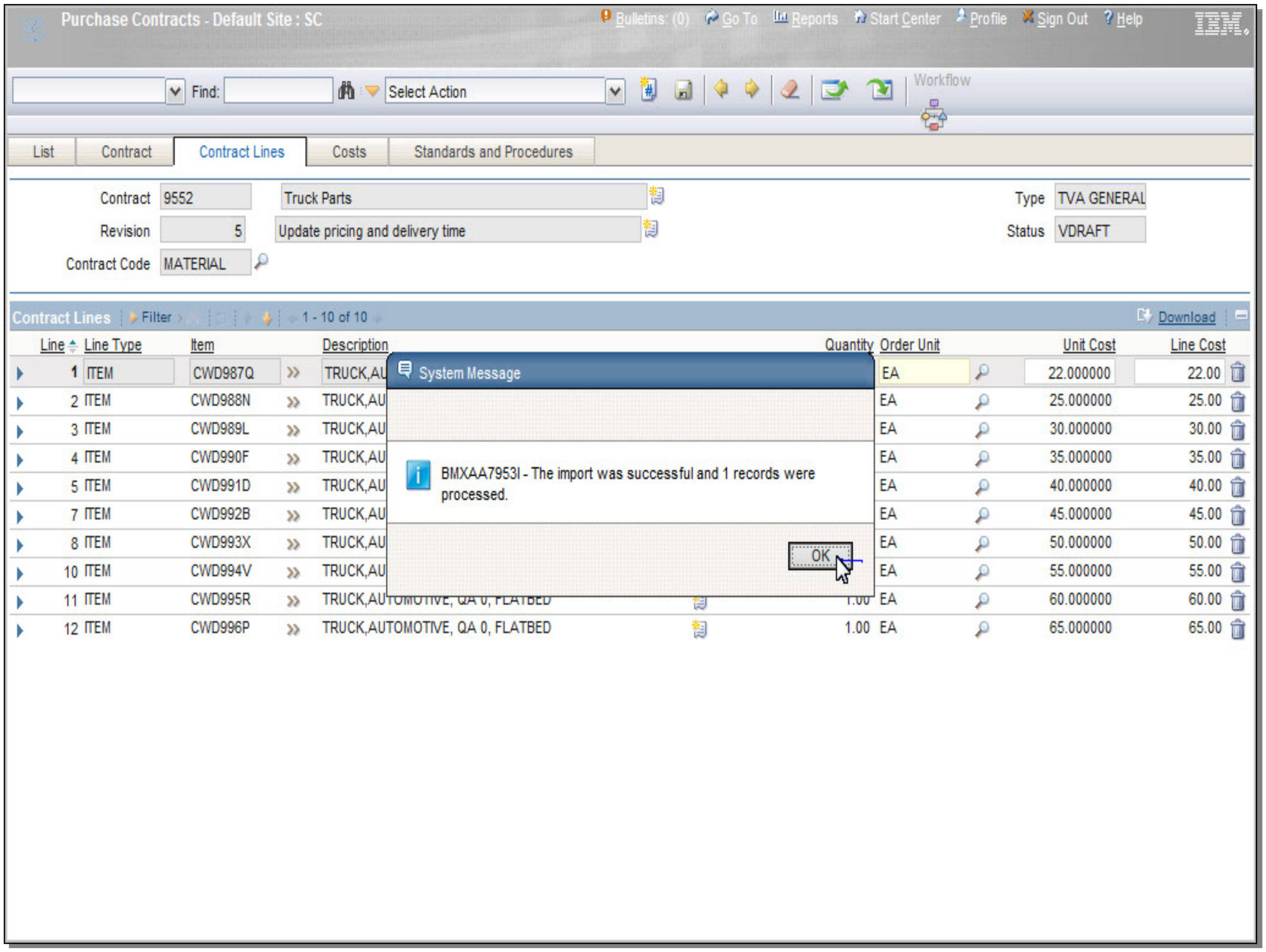
Slide notes

Text Captions

This message indicates that the import was successful.

Click anywhere to continue.

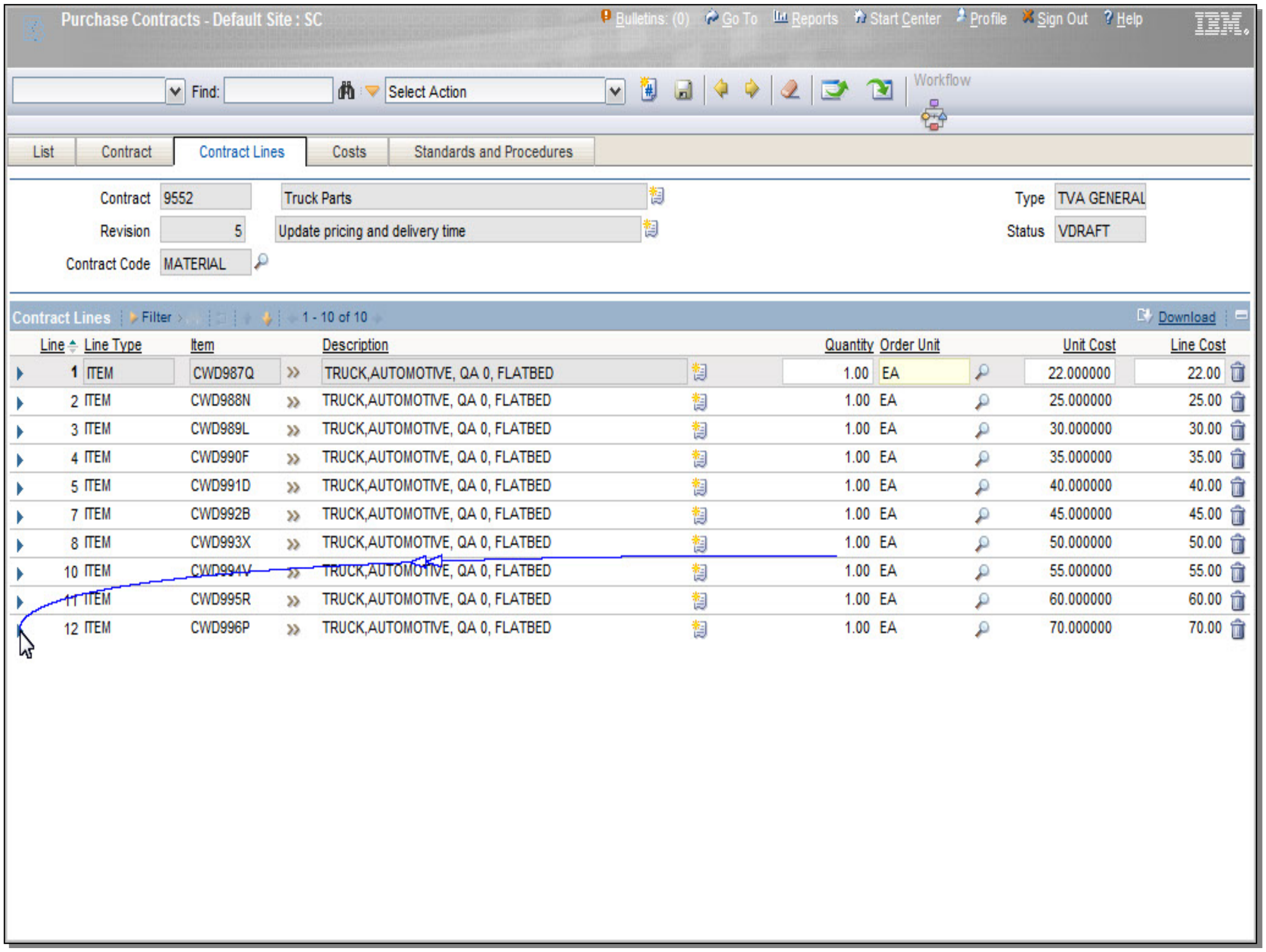
Slide 190 - Demo



Slide notes

Text Captions

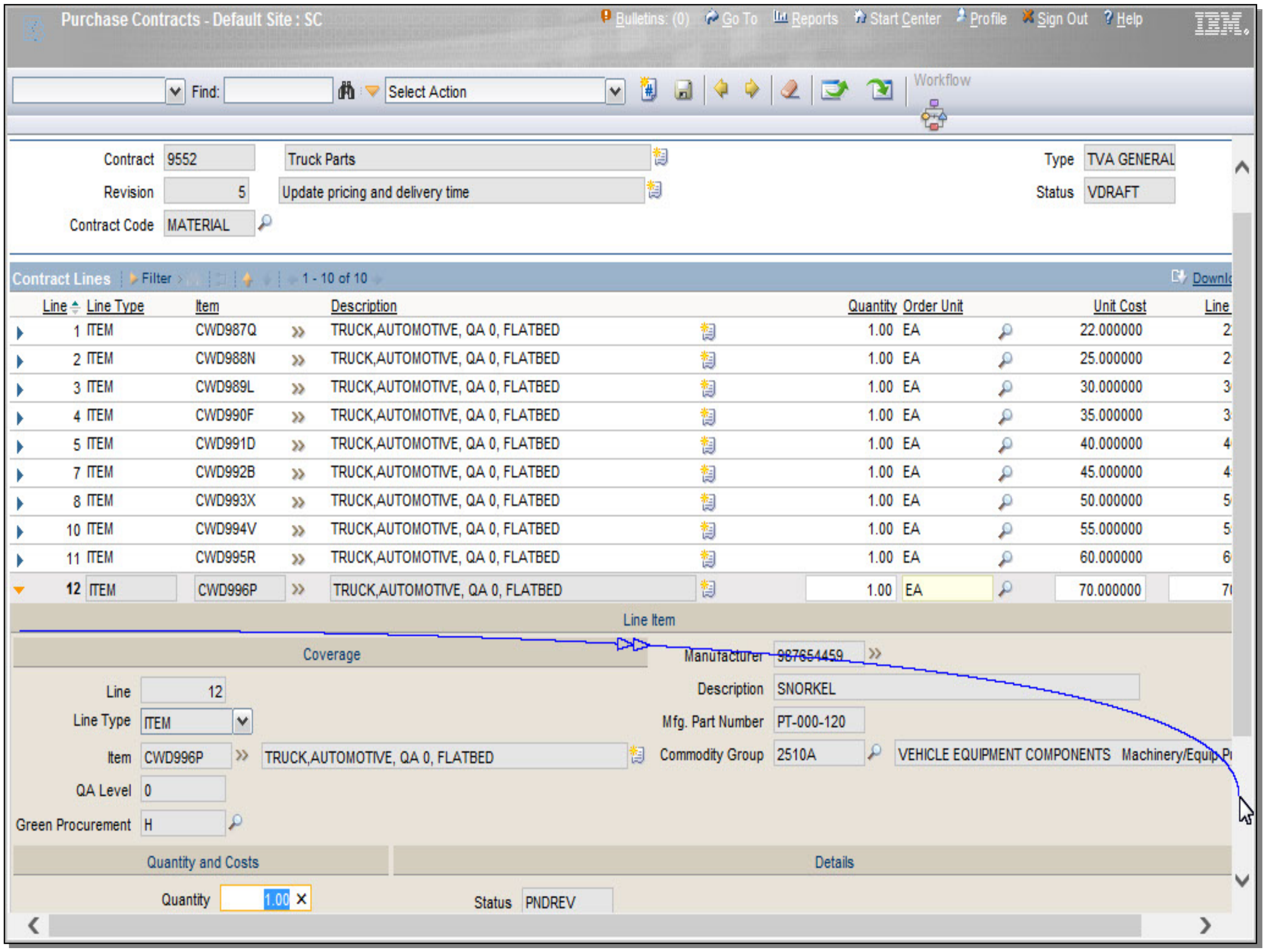
Slide 191 - Demo



Slide notes

Text Captions

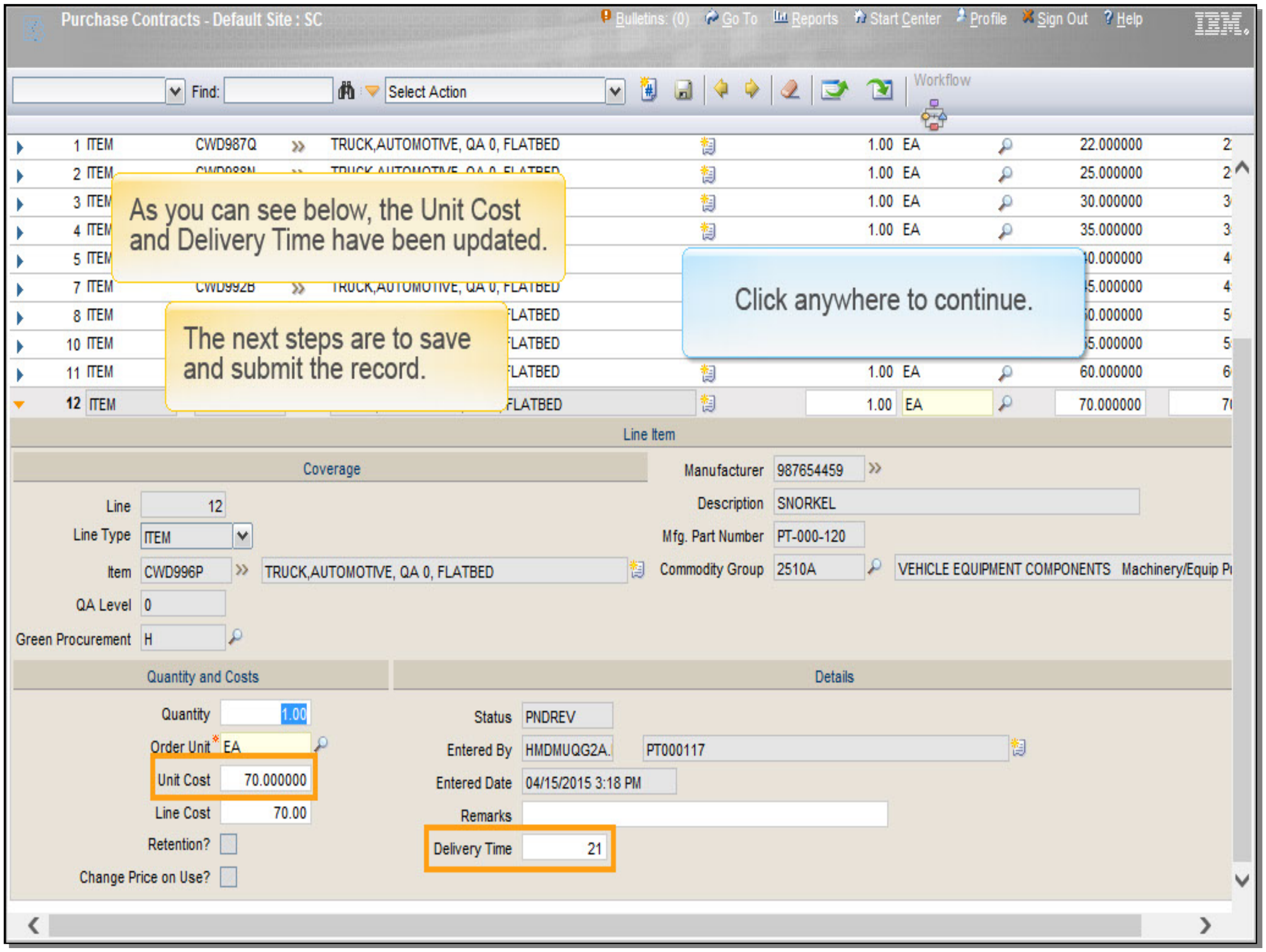
Slide 192 - Demo



Slide notes

Text Captions

Slide 193 - Demo



Slide notes

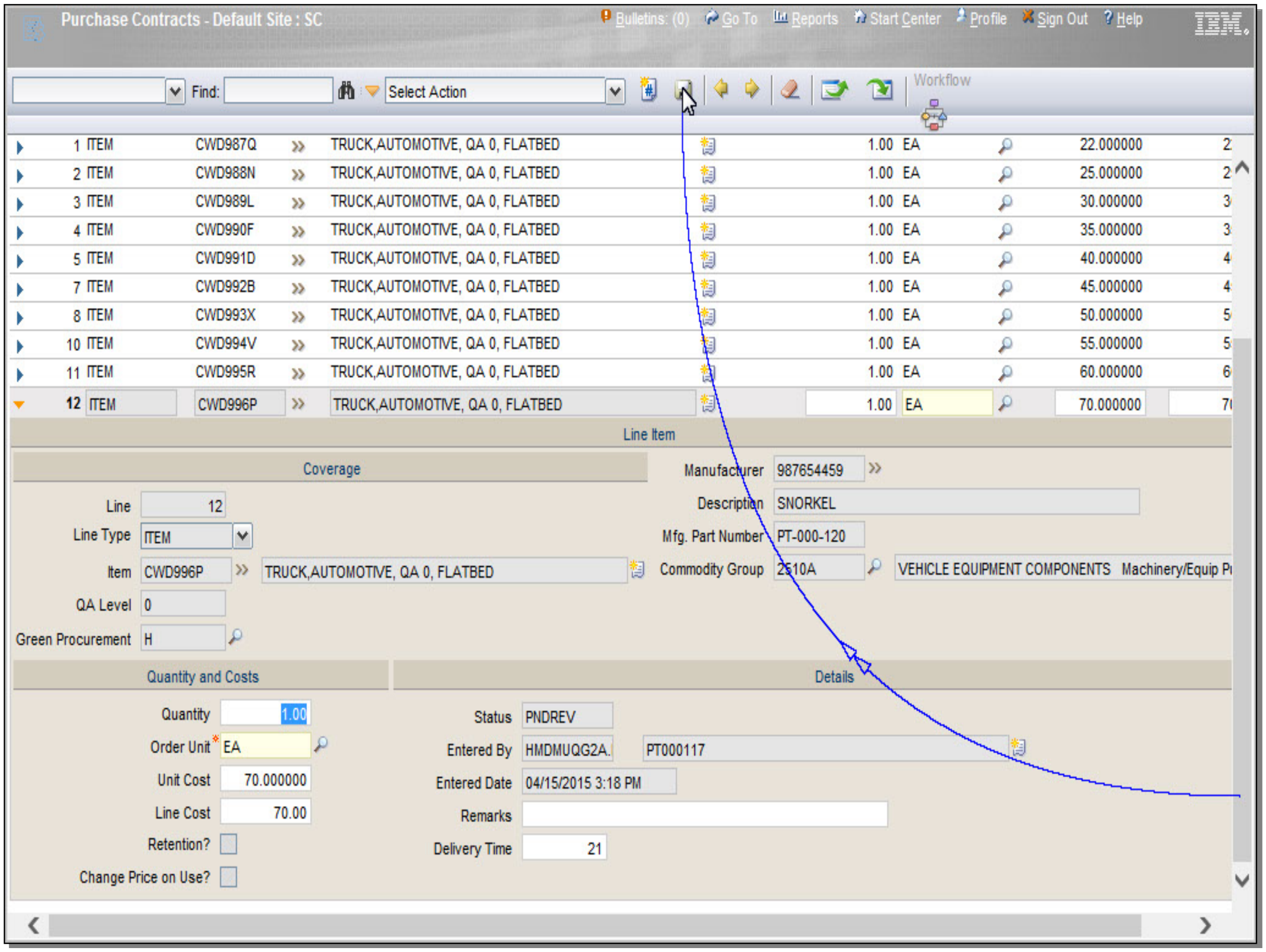
Text Captions

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

Click anywhere to continue.

The next steps are to save and submit the record.

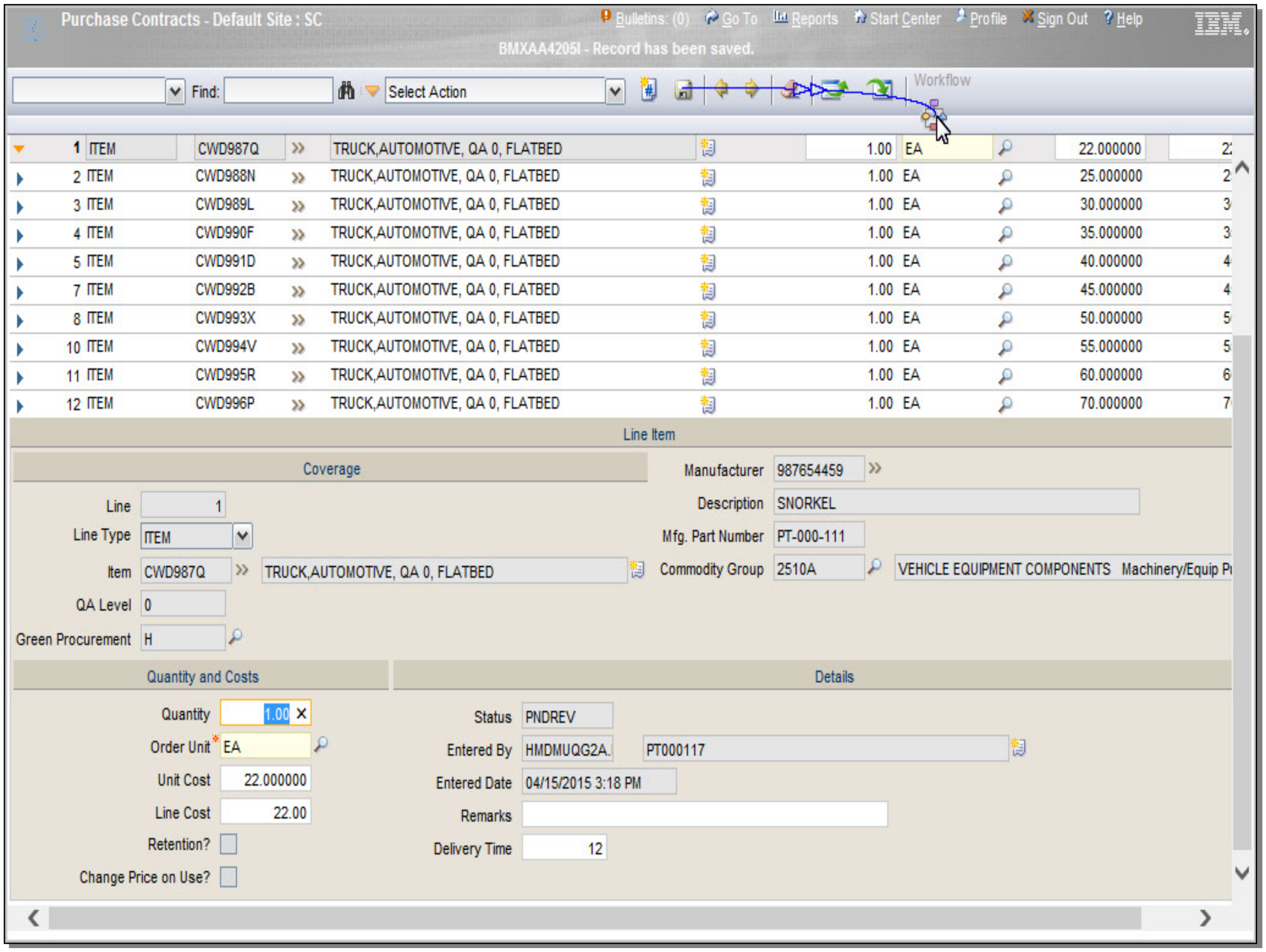
Slide 194 - Demo



Slide notes

Text Captions

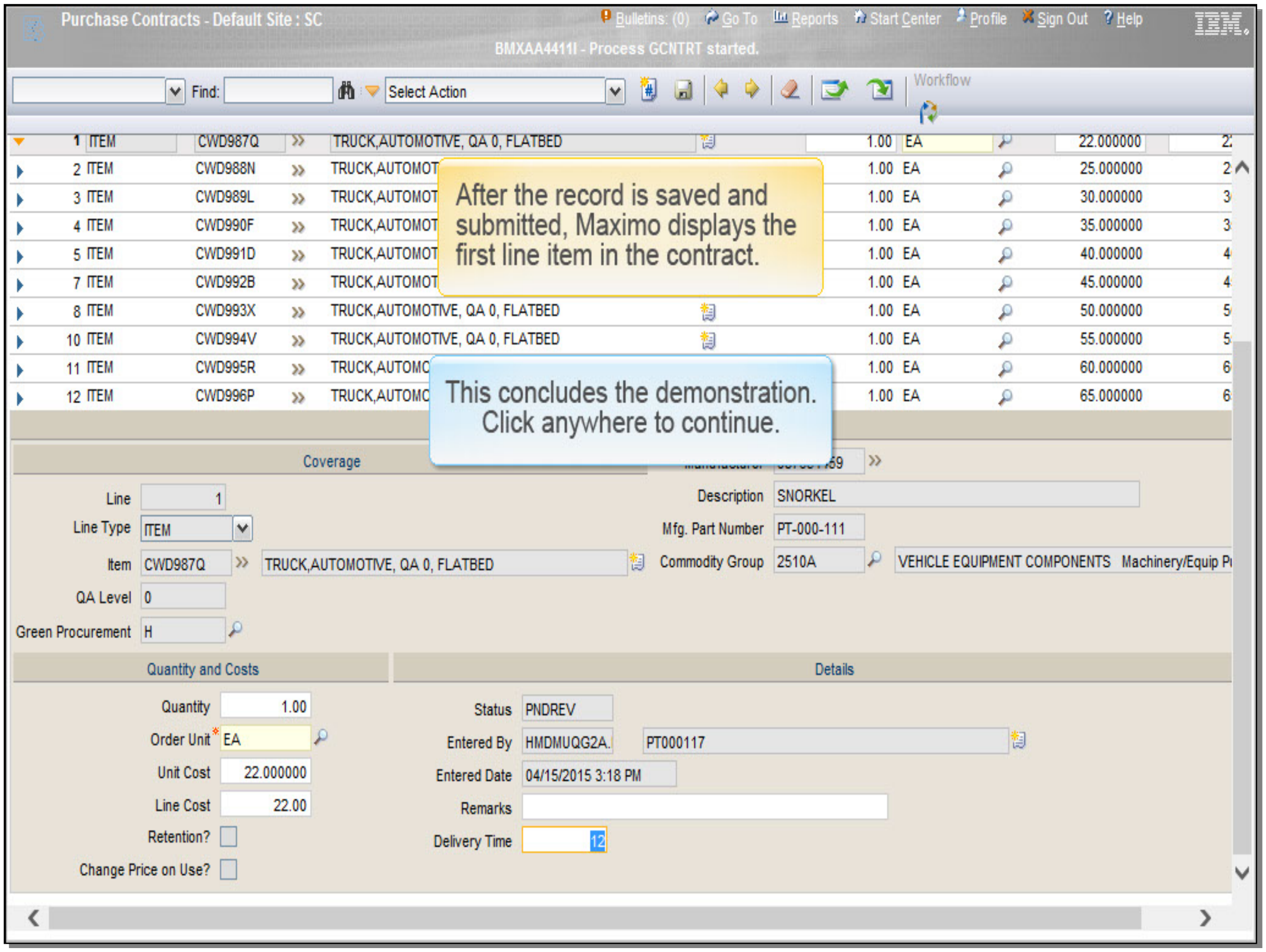
Slide 195 - Demo



Slide notes

Text Captions

Slide 196 - Demo



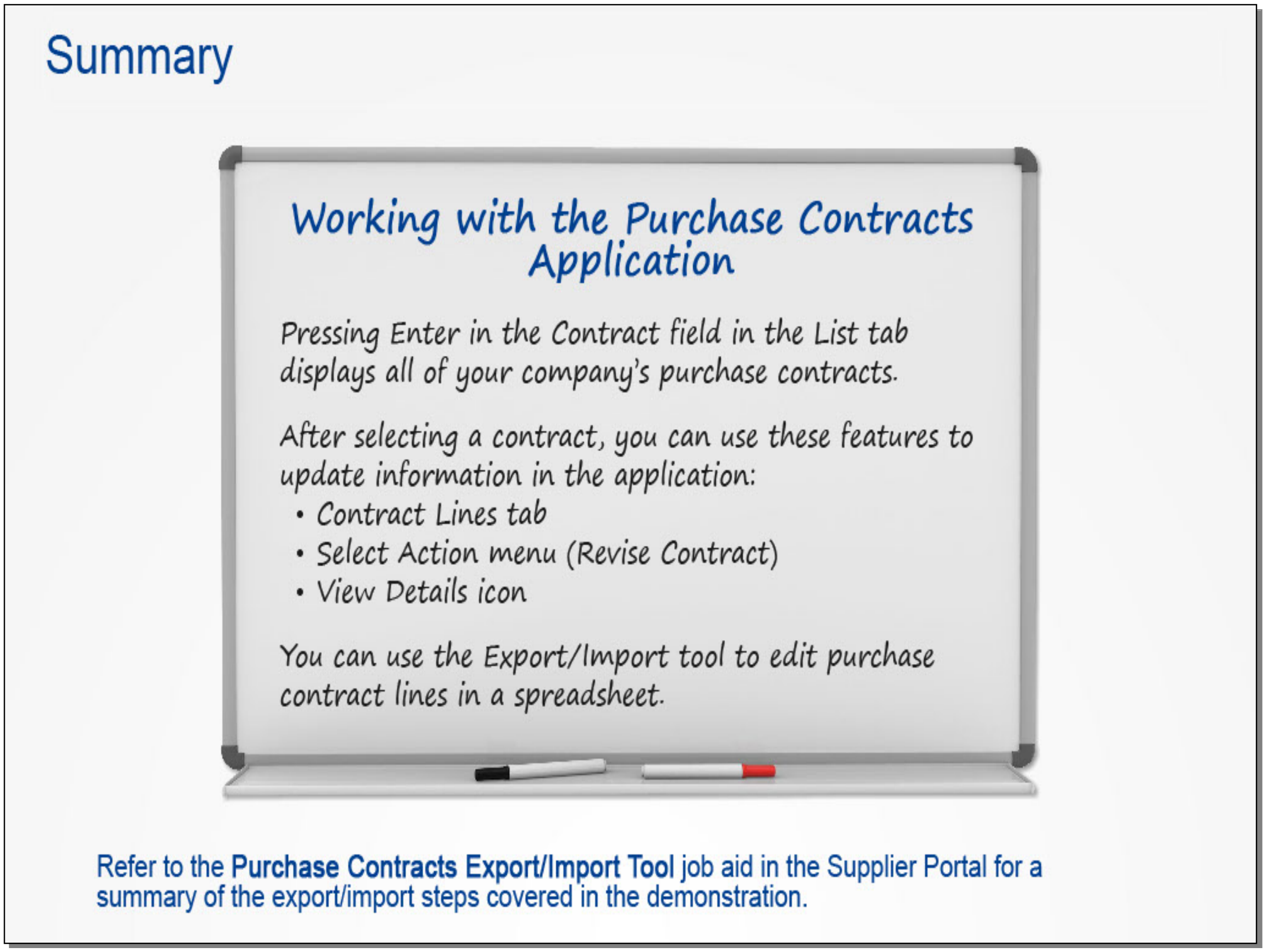
Slide notes

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.

Slide 197 - Summary



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

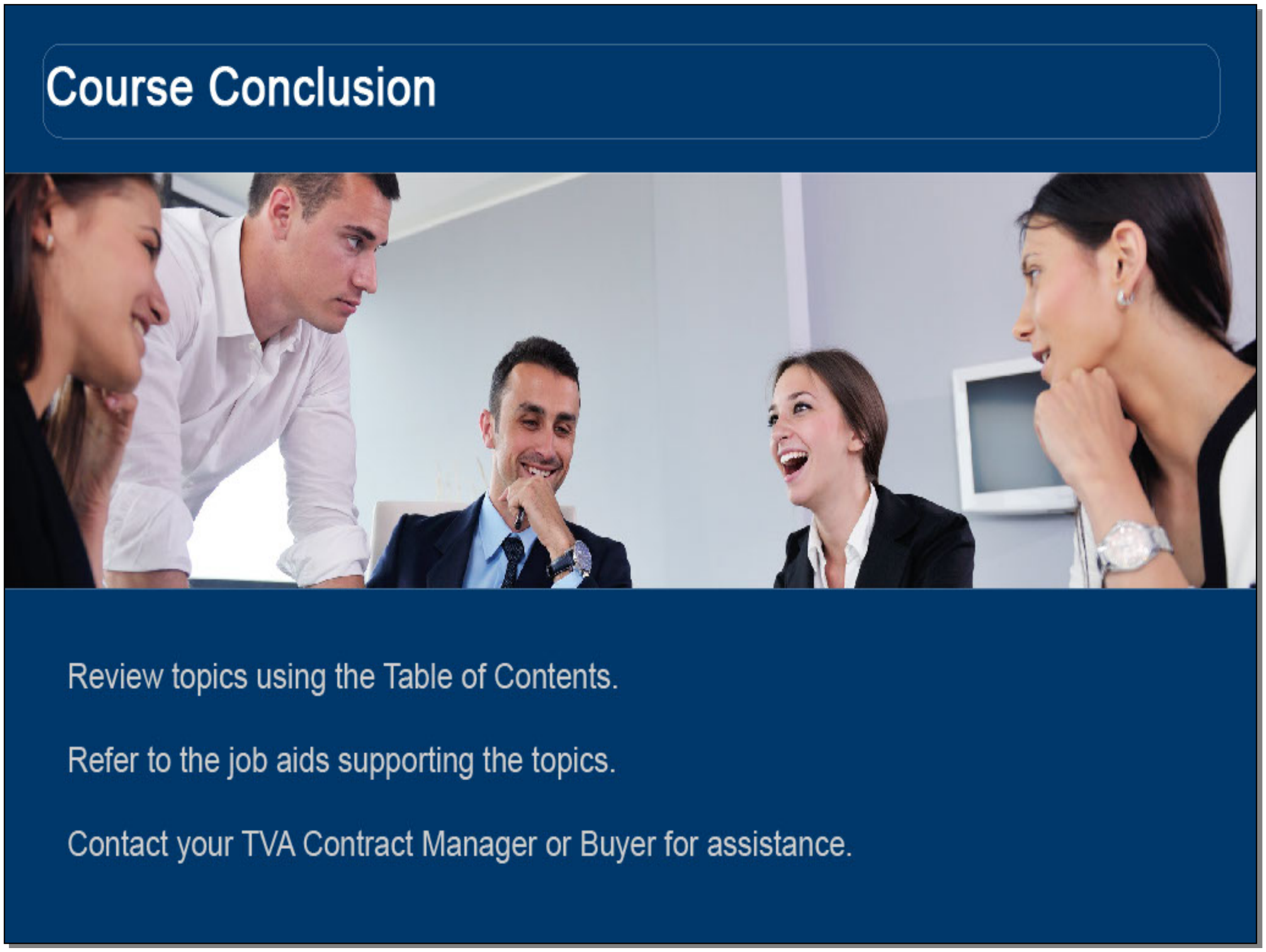
Select Action menu (Revise Contract)

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.

Slide 198 - Course Conclusion



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.