

Slide notes Enter slide note

Text Captions

Maximo for the Supplier Portal

Version 1.0



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

esson	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 contrac 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

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



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

			Supplier Portal	TVAKids Employe	es & Retirees Online Connection
TVA	TENNES	SEE VALLEY AUTHOR	lity	SEARCH	QGO
HOME	ABOUT TVA	ENERGY ENVIRONMENT	RIVER MANAGEMENT ECO	ONOMIC DEVELOPI	MENT NEWS
Supplier Conn	nections	Supplier Connect	ions 🔅		ixisting Suppliers
Supplier Connect	tions Home	Thank you for your interest i Supplier Connections Portal.	in TVA's Supply Chain and for visiti The role of Supply Chain is a critic	ing our cal	Companies that have a current
Doing Business v	with TVA	component in accomplishin-	Click the		Portal login
Supplier Diversity	/	management, which inclue	lore applications & inforr	mation link.	IQNavigator
Self-Service Tools	s	provide materials and server (TCO), and materials manage	ement, which effectively manages	TVA's	InvoiceQuery - VIQS
TVA Surplus Sale	es	warehousing, investment rec	overy and logistics operations in o	order to	More application Baxinformation
Supply Chain Nev	ws	As you payigate through this	erve working capital. s site, you will learn more about ou		
Fraguantly Acker	d Questions	organization as well as abou	t doing business with TVA including	g our	Potential Suppliers
r requentity Asked		supplier diversity commitment	it. Again, thank you for visiting us	online. We tter and we	Companies that are seeking to do business with TVA.
Contact Informatio	ion	recognize our Suppliers as pa	arthers in working to make TVA bet		
Contact Information	ion	recognize our Suppliers as p- value your input. We are cor	ntinually updating our site, so we e	encourage	Apply to be a TVA supplier

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.



	Supplier Portal TVAKids Employees & Retirees Online Connection
	SSEE VALLEY AUTHORITY GO
HOME ABOUT TVA	ENERGY ENVIRONMENT RIVER MANAGEMENT ECONOMIC DEVELOPMENT NEWS
	Supplier Information
Supplier Connections	active contract with TVA.
Supplier Connections Home	Companies that have a current
Doing Business with TVA	Supplier Connections Portal Our suppliers must accommodate TVA's diverse business needs to
Supplier Diversity	support our generation, delivery, and business services organizations
Self-Service Tools	 while fulfilling TVA's mission. Companies with active contracts can conduct business by logging into or registering to access the Supplier
TV/A Surplus Salas	Connections Portal and using the EAM/Maximo system. These suppliers
	are also able to update their purchase order delivery dates, contract Potential Suppliers line updates and contract pricing, contract downloads, respond to
Supply Chain News	RFQs & Companies that are seeking to do business with TVA
Frequently Asked Questions	contral Click the Register link. Chievements against
Contact Information	
OIG Hotline	Kiickisteer
Feedback	Recover/Activate your password
	Documents

Slide notes

Text Captions

Click the **Register** link.

Slide 8 - Registering for the Supplier Portal

*Preferred User ID:		(e.g. hIsmith)	*First Name:	Initia	ls:
2nd Choice User ID:		(e.g. howlsmith)	*Last Name:	Suff	ix: (Jr., III)
*Password:		password rules	Job Title:		
*Retype Password:			*Organization Type:	Supplier	•
***			*Organization Name:		
*Address:		-	*Email:		_
*State:	Tennessee		Lindii		(6.5. 122-456-7890)
*ZIP Code	(5-diait)	Click anywh	ere to continue.	astern 🔻	(eigi 125 455 7555)
		Submit	Registration		

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	TVAKids Emplo	oyees & Retirees Online Connection
TVA	TENNES	SEE VALLEY AUTHOR	TY	SEARC	н Q GO
HOME	ABOUT TVA	ENERGY ENVIRONMENT	RIVER MANAGEMENT E	ECONOMIC DEVELC	PMENT NEWS
Supplier Co	onnections	Supplier Connections	DNS	siting our	Existing Suppliers
Supplier Conn	ections Home	Supplier Connections Portal.	The role of Supply Chain and for vis	itical	active contract with TVA.
Supplier Divers	ss with TVA	improving operational effic management, which inclue provide materials and serv	Click the ore applications & info	ormation link	Portal login IQNavigator
TVA Surplus S	Sales	(TCO), and materials manage warehousing, investment reco	ment, which effectively manage overy and logistics operations ir	es TVA's n order to	More appli Click Boxn formation
Supply Chain I	News	optimize inventory and conse	rve working capital.		
	ked Questions	As you navigate through this organization as well as about	site, you will learn more about doing business with TVA includ	our ling our	Potential Suppliers
Frequently As		supplier diversity commitment	. Again, thank you for visiting u	us online. We	Companies that are seeking to do business with TVA
Frequently As Contact Inform	nation	recognize our Suppliers as pa	rtners in working to make TVA I	better and we	
Frequently As Contact Inform OIG Hotline	nation	recognize our Suppliers as pa value your input. We are con	rtners in working to make TVA tinually updating our site, so we	e encourage	Apply to be a TVA supplier

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

	Supplier Portal TVAKids Em	ployees & Retirees Online Connection
	NESSEE VALLEY AUTHORITY	RCH Q GO
HOME ABOUT	VA ENERGY ENVIRONMENT RIVER MANAGEMENT ECONOMIC DEVE	ELOPMENT NEWS
	Supplier Information	
Supplier Connection	For existing suppliers who have a current	Existing Suppliers
Supplier Connections Ho	e	Companies that have a current
Doing Business with TVA	Supplier Connections Portal	active contract with TVA.
Supplier Diversity	support our generation, delivery, and business services organizations	Login
Self-Service Tools	 while fulfilling TVA's mission. Companies with active contracts can conduct business by logging into or registering to access the Supplier 	More information
TVA Surplus Sales	Connections Portal and using the EAM/Maximo system. These suppliers	Detential Suppliant
Supply Chain News	line updates and contract pricing, contract downloads, respond to	Companies that are seeking to do
Frequently Asked Questi	KFQS & EKFQS, perform company maintenance, update company information, and report subcontracting achievements against	business with TVA.
Contact Information	Click the	Apply to be a TVA supplier
OIG Hotline	Login Recover/Activate your password link.	More information
Feedback	Register	
	Recover/Activitietebypour password	Documents

Slide notes

Text Captions

Click the **Recover/Activate your password** link.

Slide 11 - Activating Your Password

	*
Monday, Apr	06, 2015
Password Recovery	
This facility allows you to receive an email ticket granting you the ability to reset your user account password.	
Note: The link supplied in the email ticket is only valid for 30 minutes. Please use the link immediately on receipt.	
Warnings: do not use this facility if you have a shared email account. This facility is not valid for TVA employees and contract	ors.
Please enter your user id: Submit You must click "Submit" to successfully request Password Recovery.	
* Use of this facility is closely monitored.	
Use the link in the email notification within 30 minutes to access the password reset screen.	
Click anywhere to continue.	τ.

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

Mo	After completing this screen, you
You must set a new password to recover ac your account.	cess to
 Must be exactly eight characters in length. Must have at least one uppercase and one lowercas character. Must contain at least one number. Valid characters are A-Z, a-z and 0-9. Cannot contain your User ID (example: jhdoe) or pa name. Cannot contain common patterns of letters or numb as "Abcd1234". Cannot contain words of five characters or more th found in the dictionary. 	Do not use that login screen. Instead, navigate back to the Supplier Connections home page at are Click anywhere to continue.
Confirm Password:	Update

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

				Supplier Portal	TVAKids Emp	loyees & Retirees Online Conn	ection
TVA	TENNES	SEE VALLEY A	UTHORITY		SEARC	CH Q	GO
HOME	ABOUT TVA	ENERGY ENVI	RONMENT RIVER MANAG	EMENT EC	ONOMIC DEVEL	OPMENT NEWS	
Supplier Con Supplier Conne Doing Busines Supplier Divers Self-Service To TVA Surplus S	onnections ections Home is with TVA sity pols Sales	Supplier Con More Supplier Connection Supplier Connection component in accor improving operation management, which provide materials an (TCO), and materia warehousing, invest optimize inventory	nnections ections Info interest in TVA's Sup is Portal. The role of mplishing TVA's overall goals ial efficiency. Our core func- in includes all activities of the nd services at the lowest to ils management, which effec- timent recovery and logistic and conserve working capit	ck the Porta s of lowering co tions are contr e contracting p tal cost of own tively manages s operations in al.	al login link osts and act process to hership s TVA's order to	Existing Suppliers Companies that have a current active contract with TVA. PClick/Box IQNavigator InvoiceQuery - VIQS More applications & information	
Frequently Asl	ked Questions hation	As you navigate the organization as well supplier diversity co recognize our Supp value your input. W	rough this site, you will lear I as about doing business w ommitment. Again, thank yo liers as partners in working /e are continually undating	n more about o ith TVA includir u for visiting us to make TVA b our site, so we	ur ng our s online. We etter and we encourage	Potential Suppliers Companies that are seeking to d business with TVA.	lo
OIG Hotline Feedback		you to visit often.	e e e constructiny aparating a			More information	

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

linside	eNet	
		Monday, April 06, 2015
ase enter you	ır Network ID and Password.	
		AUTHORIZED USERS ONLY
User ID: Password:		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.
	Remember me on this computer.	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
Click	anywhere to continue.	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

				PT000117 -
ENTERPRISE SYSTEMS PROGRAM	TA	Click anywher	e to continue.	
			Search	<u>→</u>
Welcome to the Supply Chain Community. Enabled by the new EAM technology, TVA is incorporating the r including supply chain. Having all the major processes in one s supply chain, allows Supply Chain to enhance our customer su	ply Chain	he work management process, hent, corrective action program, and One TVA, One Team, One Fleet."	Supplier Information Edit Supplier Detail Purchase Orders Purchase Orders Quote Management TVA RFQ Vendor R	ts esponse
Supply Chain's mission is to deliver a substantial, sustainable, effectively executing sourcing, materials management, and sup and support good corporate citizenship. If you have any questions, please email Supplier Connections	competitive advantage oport service strategies at supplierconnections(to TVA by developing and s that satisfy TVA's business needs @tva.gov	TVA eRFQ Vendor Contract Management Edit Purchase Cont Supplier Subcontra Accomplishments	ract cting
٠		m		

Slide notes

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

Text Captions

Click anywhere to continue.



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

Working with the Companies Application



Overview Accessing the Application Viewing the Company Record Editing the Record Adding a Contact Navigating Using the Go To Menu

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 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

		PT000117 -
ENTERPRISE Systems PROGRAM		
	Search	→
	Click the Edit Sumplier Details link	
Sup	ply Chains	Functions
Welcome to the Supply Chain Community. Enabled by the new EAM technology, TVA is incorporating the	major components of the work management process,	Functions
Welcome to the Supply Chain Community. Enabled by the new EAM technology, TVA is incorporating the including supply chain. Having all the major processes in one is supply chain, allows Supply Chain to enhance our customer su Supply Chain's mission is to deliver a substantial, sustainable,	major components of the work management process, system, work management, corrective action program, and upport and operate as "One TVA, One Team, One Fleet." Competitive advantage to TVA by developing and	Functions Information t SClick:Boxoetails corders chase Orders magement A RFQ Vendor Response A eRFQ Vendor Response
Welcome to the Supply Chain Community. Enabled by the new EAM technology, TVA is incorporating the including supply chain. Having all the major processes in one supply chain, allows Supply Chain to enhance our customer su Supply Chain's mission is to deliver a substantial, sustainable, effectively executing sourcing, materials management, and su and support good corporate citizenship. If you have any questions, please email Supplier Connections	major components of the work management process, system, work management, corrective action program, and ipport and operate as "One TVA, One Team, One Fleet." competitive advantage to TVA by developing and port service strategies that satisfy TVA's business needs at supplierconnections@tva.gov	Functions Information It SClick Box etails Corders Chase Orders Inagement A RFQ Vendor Response A A RFQ Vendor Response Management t Purchase Contract oplier Subcontracting complishments

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

Com	panies (Nuc) - Defat	ult Site : SC		₽ <u>B</u> ulletins: (0)	r <mark>∕e <u>G</u>o To ⊔⊔ <u>R</u>eports </mark>	art <u>C</u> enter 🔺 <u>P</u> rofile 🔻	Sign Out 🖇 Help 👔 🔢 👔
	Y Find:	尚 🔻	Select Action	V 🗟 🔶	۰ ا		
List	Company Con	tacts Addresses	Diversity				
Companies	💗 Filter⇒∰a 🚍 🤇	😚 🔤 0 - 0 of 0					🕼 <u>Download</u> 🗖
Company	Description	Co	mpany Status	Company Type Address 1	City		State/Province Quality Status
Pr keybo	ess the Ente pard to searc	r key on your ch for the record	To fin For mo To ent	d records, use the filter fields and re search options, use the Advan er a new record, select the Insert	then press Enter. ced Search button. icon in the toolbar.		

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		₽ <u>B</u> ulletins: (0)	₩ Start <u>C</u> enter [▲] <u>P</u> rofile	Kign Out ? Help III .
Y Find:	✓ Select Action	💽 🗟 🍳 🔶 🖉		
List Company Contacts Addresse	s Diversity			
Companies 🛛 🗸 Filter > 🚜 🎁 😚 🐘 👘 🗐 - 1 - 1 of	1 👳			E/ <u>Download</u> =
Company Description	Company Status Company Typ	<u>e Address 1</u>	City	State/Province Quality Status
CONSIGNED AND ANY INC.		400 In due to a live	A	
Click the 5555555555500 lin	k.			

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 555555555500 link.

Slide 23 - Viewing the Company Record

Companies (Nuc) - Default S	Site : SC	<mark>Ф</mark> <u>B</u> ulletins: (0)		🎾 Start <u>C</u> enter 👎 <u>P</u> rofile 🛛 🗮 <u>S</u> ign O	out ? Help IIM,
Find:	n 🕫 🔝 Select Action		۰ 🖉		
List Company Contacts	s Addresses Diversity				A
Company 555555555	5-0 XYZ Inc.	b		Quality Status	GENERAL
Parent	>>	<u>þ</u>		Company Type	v 🔑
Customer #				Company Status	ACTIVE P
Home Page		Click anywhere to o	ontinuo	Company Classification*	FEDA
Doing Business As		Click allywhere to c	Jillinue.	FEDA Code	P
Attachments View/Attach	Print			SRM Segmentation	P
Purchasing Details		Payment Details			=
1099 Required?	Freight Terms	Pay To			
1099 Code 🖉 🔎	FOB Point	Payment Terms .	15 % 13 DISC DAYS 30 NET	F DAYS	
Expelled Vendor?	Ship Via	AP Control Account	X00001:D00000000:211	18:0014M39	P
Tax ID	Ship Type	P RBNI Account	X00001:D00000000:211	18:0014M39	9
	Payment on Receipt?	Suspense Account	X00001:D00000000:211	18:0014M39	
		Tool Control Account			Q
		Consignment Account			4
E-Commerce: EDI / Fax Information			=	E-Commerce: Other Informatio	n 🗖
E-commerce Sup	plier				
Send PO E	EDI?			Vendor	Sends Invoice?
				Send Remittan	ce Advice FED?
Send RFQ E	EDI?				
Cond Domittoneo Advice					-

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 Compar	y Record
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Companies (Nuc) - Default Sit	🖲 Bulletins: (0) 🏟 Go To 🖾 Reports 🏠 Start Center 🏄 Profile 🕷 Sign Out 🖇 Help 🏾 🎫 👘
Click the Contacts tab.	
▼ Find:	
List Company ClicktBdx Addresses Diversity	
Company 55555555-0 XYZ Inc.	Duality Status GENERAL
Parent >>>	ta Company Type V 🔎
Customer #	Company Status ACTIVE A
Home Page	Company Classification * FEDA
Doing Business As	FEDA Code
Attachments View/Attach Print	SRM Segmentation
Purchasing Details	Payment Details
1099 Required? Freight Terms	Pay To
1099 Code Point	Payment Terms .15 % 13 DISC DAYS 30 NET DAYS
Expelled Vendor? Ship Via	AP Control Account X00001:D00000000:21118:0014M39
Tax ID Ship Type 🔑	RBNI Account X00001:D00000000:21118:0014M39
Payment on Receipt?	Suspense Account X00001:D00000000:21118:0014M39
	Tool Control Account
	Consignment Account
E-Commerce: EDI / Fax Information	E-Commerce: Other Information
E-commerce Supplier	
Send PO EDI?	Vendor Sends Invoice?
	Send Remittance Advice FED?
Send DEO EDI2	
Cand Damittanan Advise EDI2	Y

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

Companies (Nuc) - Default Site : SC V Find: List Company Contacts Clitck Boxes Dive	the Addresses tab.	tart <u>C</u> enter ^{\$} <u>P</u> rofile [*] Sign Out ? <u>H</u> elp <u>重要</u> 罪。
Contacts > Filter > 1 - 2 of 2		
Contact	<u>E-mail</u>	Email Addre
Jane Doe	test2@gmail.com	D
New Row	test@gmail.com	A
•	III	•

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.

Companies (Nuc	:) - Default Site : Find:	SC	Select Action	Click the Diversity tab.	かStart Center * Profile * Sign Out ?Help ፲霆元。
Company 555555555	XVZ Inc	Addresses	Clicketswy	1 Quality Statue GENERAL	
company assesses	X12 m.				
General Information				🗖 Remit To Informatio	วท
Customer Contact	John Doe			Contact	٩
Address 1	123 Industrial Way	/		Address 1	
Address 2				Address 2	
Address 3				Address 3	
Address 4				Address 4	
City	Anywhere			City	
County				State/Province	
State/Province	22224			ZIP/Postal Code	
ZIP/Postal Code	33334			Country	٩
Country	05				
Company Fax					
			if an a	with your Contract Manager address change is required.	
1				III	

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

Companies (Nuc) - Default Sit	9 Bulletins: (0) 🖉 Go To 🔟 Reports か Start Center ≯ Profile ¥ Sign Out ? Help
List Company ClicktBcx Addresses Diversity	
Company 5555555550 XYZ Inc.	Duality Status GENERAL
Business Status	
Valley Business Presence?	
Woman Owned Business? 🖌	
8a Certification?	
Service Disabled Veteran Owned?	
HUB Zone Business? 🗸	
Minority Business?	
Small Business?	
	Ш

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

Companies (Nuc) - Default Site : SC	଼ Bulletins: (0) 🏟 💁 To 🔟 Reports 🏚 Start Center 🏄 Profile 🚜 Sign Out 🤋 Help	IBM.
Find: Select Action	 Image: A state of the state of	
List Company Contacts Addresses Diversity		
Click the View Details icon.	2 Quality Status GENERAL	
Contact	E-mail	Email Addre
▶ Jane Doe	test2@gmail.com	D
John Doe	test@gmail.com	A
New Row		
		,
L		

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	🔒 gulletins: (0) 🏟 Go To 🔟 Beports 🕅 Start C	enter ⁴ Profile ¥ Sign Out ? Help TEN ,
Find: Relect Action	v 🗟 🍳 🔶 🧟	
List Company Contacts Addresses Diversity		
Company 5555555550 XYZ Inc.	Quality Status GENERAL	
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▼ Jane Doe	test2@gmail.com	Click the Select Value icon.
John Doe	test@gmail.com	
Contact Information		Information Related to Email A fre
Contact Jane Doe		Email Address Status D
Position * C		Email PO?
Phone * 555-555-1111		Email PO Revision?
Fax		
E-mail test2@gmail.com		Email Remittance Advice?
Pager Phone		
Home Phone		Email Invoice Rejection?
		Last Updated By HMDMUQG2A.
		Last Updated 04/06/2015 3:05 P
New Row		
•	III	•

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

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E-mail test2@gmail.com		Deactivated			_
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				Last Updated	04/06/2015 3:05 P
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Slide notes

Text Captions

Click the **A** value.
Slide 31 - Editing the Record

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Find: Relect Action	🔽 🖌 🍦 🏒			
List Company Contacts Addresses Diversity				
Company 5555555550 XYZ Inc.	Quality Status GENERAL			
Contacts > Filter > / = +				
Contact	E-mail			Email Addre
▼ Jane Doe	test2@gmail.com			A
John Doe	test@gmail.com			A
Contact Information	Clic	ck the Email PO	? check box.	ated to Email Addre
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Phone 555-555-1111			Email PO Revision?	
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Slide notes

Text Captions

Click the Email PO? check box.

Slide 32 - Editing the Record

Companies (Nuc) - Default Site : SC	gulletins: (0) 🖗 Go To 🔟 Reports 🏠 Start Center 🤌 Profile 🗮 Sign Out 💈 Help
Find: Select Action	
List Company Contacts Addresses Diversity	
Company 555555555-0 XYZ Inc.	lity Status GENERAL
Contacts 🖌 Filter » 🛝 📋 🐳 🍦 🚽 1 - 2 of 2	
Contact	E-mail Email Addr
▼ Jane Doe	test2@gmail.com A
John Doe t	test@gmail.com A
Contact Information Contact Jane Doe Position * C P Sales Phone * 555-555-1111 Fax E-mail test2@gmail.com Pager Phone Home Phone	Click the Email PO Revision? check box.
New Row	Last Updated 04/06/2015 3:05 P

Slide notes

Text Captions

Click the Email PO Revision? check box.

Slide 33 - Editing the Record

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List Company Contacts Addresses Diversit	у	
Company 555555555-0 XYZ Inc.	auality st Click the Save Comp	any icon.
Contacts Filter > 1 - 2 of 2	F.mail	Email Addr.
	test2@omail.com	
John Doe	test@gmail.com	A
Contact Inf	formation	Information Related to Email Addre
Contact Jane Doe		Email Address Status 🛕 🔎
Position [*] C		Email PO? 🗸
Phone [*] 555-555-1111		Email PO Revision?
Fax		
E-mail test2@gmail.com Pager Phone		Email Remittance Advice?
Home Phone		Email Invoice Rejection?
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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	₽ <u>B</u> ulletins: (0) 脅 <u>G</u> o To <u>IIII R</u> eports わ Start BMXAA42051 - Record has been saved.	Center ⁴ Profile 🔻 Sign Out 🤋 Help 📑 👬 。
Find: Select Action	▼ 🗟 🍳 🔶 🖉	
List Company Contacts Addresses Diversity		
Company 5555555550 XYZ Inc.	2 Quality Status GENERAL	
Contacts Filter > 1 - 2 of 2		
Contact	<u>E-mail</u>	Email Addri
▼ Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
Contact Inform	ation	Information Related to Email Addre
Contact Jane Doe		Email Address Status 🛕 🔎
Position C Sales		Email PO? 🗹
Phone [*] 555-555-1111		Email PO Revision?
Fax		
E-mail test2@gmail.com		
Pager Phone		Email Remittance Advice?
Home Phone		Email Invoice Rejection?
		Last Updated By HMDMUQG2A.
		Last Updated 04/06/2015 4:59 P
Click Bow		
Click the New Row button.		
•	III	•

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	🖲 <u>B</u> ulletins: (0) 🖗 <u>G</u> o To 🛯 🛄 <u>R</u> eports	🕅 Start <u>C</u> enter 👎 <u>P</u> rofile 👫 <u>S</u> ign Out 💡 <u>H</u> elp	IIM.
×	Find:	🕅 💎 Select Action	<u> </u>		
List Company	Contacts	Addresses Diversity			
Company 5555555555-0	XYZ Inc.		1 Quality Status GENERAL		
Contacts	≱ ↓ ⇒1-	3 of 3			
Contact			<u>E-mail</u>		Email Addre
Jane Doe			test2@gmail.com		A
John Doe			test@gmail.com		A
-					
		Contact Information		Information Rela	ated to Email Addre
Contact*				Email Address Status	P
Position *	٥				
Position				Email PO?	
Phone				Email PO Revision?	
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E-mail				Energi Derritteren Arbeiter	_
Pager Phone				Email Remittance Advice?	
Home Phone				Email Invoice Rejection?	
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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.

Slide 36 - Adding a Contact

Companies (Nuc) - Default	Site : SC	₽ <u>B</u> ulletins: (0) 🏟 <u>G</u> o To 🔟 <u>R</u> eports 🛱 Star	t <u>C</u> enter ♣Profile ¥Sign Out ?Help 🏢 📰 🗐 🤅
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Contacts > Filter > 31 = + +	1 - 3 of 3		
Contact		E-mail	Email Addre
Jane Doe		test2@gmail.com	A
John Doe		test@gmail.com	A
-			
	Contact Information		Information Related to Email Addre
Contact [*] Jay Roberts			Email Address Status
Position *			Email PO?
Phone *			Email PO Revision?
Fax			
E-mail Pager Phone			Email Remittance Advice?
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Slide notes

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Contact		<u>E-mail</u>	Email Addre
Jane Doe		test2@gmail.com	A
John Doe		test@gmail.com	A
▼			
	Contact Information		Information Related to Email Addre
Contact * Jay Roberts			Email Address Status
Position *			Email PO?
Phone [*]			Email PO Revision?
Fax			
E-mail			Email Remittance Advice?
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nome Phone			Email Invoice Rejection?
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Slide notes

Slide 38 - Adding a Contact

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Company 555555555-0 XYZ Inc	2	2 Quality Status GENERAL			
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Contact Jay Roberts	A	Contract Administrator			
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Slide notes

Slide 39 - Adding a Contact

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List Company Contacts Addresses Diversity		
Company 5555555550 XYZ Inc.	2 Quality Status GENERAL	
Contacts > Filter > = + 1 - 3 of 3		
Contact	E-mail	Email Addre
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
✓ Jay Roberts		
Contact Information		Information Related to Email Addre
Contact* lay Roberts		Email Address Status
Position		Email PO?
Phone Phone		Email PO Revision?
Fax		
E-mail		Email Demitteenen Artuise?
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Home Phone		Email Invoice Rejection?
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Slide notes

Slide 40 - Adding a Contact

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Company 5555555555 XYZ Inc.	2 Quality Status GENERAL	
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Contact	<u>E-mail</u>	Email Addre
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
 Jay Roberts 		
	Contact Information	Information Related to Email Addre
Contact [*] Jay Roberts		Email Address Status
Position * C 🖉 Sales		Email PO?
Phone *		Email PO Revision?
Fax		
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Home Phone		Email Invoice Rejection?
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Slide notes

Slide 41 - Adding a Contact

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Company 5555555550 XYZ Inc.	2 Quality Status GENERAL
Contacts > Filter >>> =	
Contact	E-mail Email Addre
Jane Doe	test2@gmail.com A
> John Doe	test@gmail.com A
✓ Jay Roberts	
Contact Information	Information Related to Email Addre
Contact [*] Jay Roberts	Email Address Status
Position [*] C \checkmark Sales	Email PO?
Phone* 555-555-1212	Email PO Revision?
Fax	
Pager Phone	Email Remittance Advice?
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Slide notes

Slide 42 - Adding a Contact

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Contacts 🥜 Filter > 💷 🦂 🕴 - 1 - 3 of 3	
Contact	E-mail Email Addre
Jane Doe	test2@gmail.com A
John Doe	test@gmail.com A
✓ Jay Roberts	
Contact Information	Information Related to Email Addre
Contact [*] Jay Roberts	Email Address Status
Position * C & Sales	Email PO?
Phone * \$55-555-1212	Email PO Revision?
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Slide notes

Slide 43 - Adding a Contact

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Company 55555555-0 XYZ Inc.	2 Quality Status GENERAL	
Contacts 🌶 Filter > 👋 🖂 🔶 🕴 🚽 1 - 3 of 3		
Contact	<u>E-mail</u>	Email Addrı
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
 Jay Roberts 		
	Contact Information	Information Related to Email Addre
Contact [*] Jay Roberts		Email Address Status
Position * C 🖉 Sales		Email PO2
Phone [*] 555-555-1212		Email DO Davision?
Fax		
E mail		
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Slide notes

Slide 44 - Adding a Contact

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Find: Select Action	→	
List Company Contacts Addresses Diversity		
Company 5555555555 XYZ Inc.	2 Quality Status GENERAL	
Contacts 🖗 Filter >>> 🗆 🍦 🛶 🚽 1 - 3 of 3		
Contact	<u>E-mail</u>	Email Addre
Jane Doe	test2@gmail.com	A
John Doe	test@gmail.com	A
✓ Jay Roberts		
Contact Information	Information Re	lated to Email Addre
Contact * Jay Roberts	Email Address Status	۹
Position * C P Sales	Email PO?	
Phone [*] 555-555-1212	Email PO Revision?	
Fax		
E-mail test3@gmail.com Pager Phone	Email Remittance Advice?	
Home Phone	Email Invoice Rejection?	
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Slide notes

Slide 45 - Adding a Contact

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List Company Contacts Addresses Diversity	
Company 555555555-0 XYZ Inc.	auality st Click the Save Company icon.
Contacts > Filter > = + = 1 - 3 of 3	E mil Add
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Home Phone	Email Invoice Rejection?
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Slide notes

Now save the Company record again.

Text Captions

Click the Save Company icon.

Slide 46 - Adding a Contact

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	BMXAA4205I - Record has been saved.	
Find: 🕅 🔻 Select Action	V 🖬 🍳 🄌 🖉	
List Company Contacts Addresses Diversity		
Company 555555555-0 XYZ Inc.	2 Quality Status GENERAL	
Contacts > Filter > _ 1 - 3 of 3		
Contact	<u>E-mail</u>	Email Addre
▼ Jane Doe	test2@gmail.com	A
Jay Roberts	test3@gmail.com	
John Doe	test@gmail.com	A
Contact Inform	nation	Information Related to Email Addre
Contact* Jane Doe		Email Address Status A
Position * C P Sales		5
Dhone * 555 555 1111		Email PO?
		Email PO Revision?
Fax		
E-mail test2@gmail.com		Email Domittance Advise2
Pager Phone		cinali Remittance Advice?
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	Click anywhere to continue	
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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

	the second s
Find: Find: Click the Go To link.	
List Company Contacts Addresses Diversity	
Company 55555555-0 XYZ Inc.	
Contacts > Filter > 20 1 3 of 3	
Contact E-mail Er	nail Addre
▼ Jane Doe test2@gmail.com A	8
Jay Roberts test3@gmail.com	
▶ John Doe test@gmail.com A	
Contact Information Information Related to Err	ail Addre
Contact [®] Jane Doe Email Address Status A	٩_
Position C P Sales Email PO? 🗸	
Phone [®] 555-555-1111 Email PO Revision?	
Fax	
E-mail Test2@gmail.com Email Remittance Advice?	
Home Phone Email Invoice Rejection?	
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	P

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

Companies (Nuc) - Default Site : SC		P Bulletins: (0) P G	o To Lu Reports 🕅 Start Condition Reports 🕨	<u>C</u> enter 🐣 <u>P</u> rofile 🕷 <u>S</u> ign Out 🖇 <u>H</u> elp	
Find:	Select Action		Planning		
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Company 5555555550 XYZ Inc.	Click the Purch	nasing menu item.	L		
Contact		E-mail			Email Addre
▼ Jane Doe		test2@gmail.com			A
Jay Roberts		test3@gmail.com			
John Doe		test@gmail.com			A
	Contact Information			Information Rela	ted to Email Addre
Contact [*] Jane Doe				Email Address Status	A P
Position * C 🖉 Sales				Email PO?	✓
Phone [*] 555-555-1111 Fax				Email PO Revision?	2
E-mail test2@gmail.com				Email Remittance Advice?	
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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

Companies (Nuc) - Default Site : SC	Ulletins: (0)	₩Start <u>C</u> enter [*] <u>P</u> rofile [*] Sign Out ? <u>H</u> el	p IBM.
Find: Select	Action 💌 园 < 🕎 Planning 🕨		
List Company Contacts Addresses Di	versity	Companies (Nuc)	
		Purchase Orders	
Company 5555555555 XYZ Inc.	😂 Quality Status GENERAL	TVA eRFQ Vendor Response	
Contacts Filter > 4 1 - 3 of 3		TVA RFQ Vendor Response	
Contact	<u>E-mail</u>		Email Addre
▼ Jane Doe	test2@gmail.com		A
Jay Roberts	test3@gmail.com		
John Doe	test@gmail.com		A
Cont	act Information	Information Re	lated to Email Addre
Contact [*] Jane Doe		Email Address Status	A P
Position * C 🔑 Sales		Email DO2	
Phone * 555-555-1111		Email PO:	
Fay		Email PO Revision?	✓
E-mail test2(@gmail.com		Email Remittance Advice?	
Home Phone	Click anywhere to continue	Email Invoice Rejection?	
	Click anywhere to continue.		
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javascript: void(0);	III		•

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 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

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



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

		PT000117 •
Entransfer Asset Menagement		
		Search 🗲
'elcome to the Supply Chain Communi	ity. Click the TVA RFQ Vendor I	Supplier Information Edit Supplier Details Response link. se Orders Purchase Orders
Velcome to the Supply Chain Communi nabled by the new EAM technology, TV cluding supply chain. Having all the mu upply chain, allows Supply Chain to en upply Chain's mission is to deliver a su ffectively executing sourcing, materials nd support good corporate citizenship.	A is incorporating the ajor processes in one system, work management, corrective action phance our customer support and operate as "One TVA, One T ubstantial, sustainable, competitive advantage to TVA by developing s management, and support service strategies that satisfy TVA's bus	Supplier Information Edit Supplier Details Response link. se Orders Purchase Orders Purchase Orders Quote Management TVA RFQ Vendor Response TVA eRFQ Vendor Response Contract Management Edit Purchase Contract Supplier Subcontracting Accomplishments

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

TVA RFQ Vendor Response - Default Site : SC	ê Ē	<u>a</u> ulletins: (0) 🏾 🏟 <u>G</u> o To	<u>₩ R</u> eports no Start <u>C</u> en	ter 🌲 <u>P</u> rofile 🕷 <u>S</u> ign	Out ? <u>H</u> elp	IEM.
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RFOs 🔐 Filter > (6) 🗇 🗇 🖉 0-0 of 0						
RFQ Description	Status	Buyer Na	ame <u>Required Date</u>	Reply Date	Site	
	٩	>>		10		P
Press the Enter key on your keyboard to search for the RFQs.	For more search options, us To enter a new record, sele	e the Advanced Search	i button. toolbar.			

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

S TV	A RFQ Vendor Response - Default Sites SC		P <u>B</u> ulletins: (0) 🏟 <u>G</u> o To 🔟 <u>R</u> eports	😚 Start <u>C</u> enter 🛛 Å <u>P</u> rofi	lle 🔻 <u>S</u> ign Out 🕇	'Help III.
				S - I - I Workflow			
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<u>RFQ</u> ≑	Description	Status	Buyer	Name	Required Date	Reply D	ate <u>Site</u>
			P	>>		10	
1000007	PR 740736	OPEN	I2O3FBCQA	Andrews, James As	shton		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	1203FBCQA	Andrews, James Asht	on		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			СТ
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	7T57EOIFS	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
1001065	TLA CHAMMEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
100		OPEN	OJP0P7K60	Neal, Josh B			SC
100 CII	ck RFQ number 1052223.	OPEN	OJP0P7K60	Neal, Josh B			СТ
100		OPEN	7T57EOIFS	Smith, Timothy Mark			KIF
100 049	TVA SHAWNEE	OPEN	7VSZ9UWTC	Goode, Matthew C			SHF
Click2BOX	Purchasing Parts for WBN Trucks	OPEN	UNIFEN6CW	Tilley, Zachary Eugene	•		GC
Select F	lecords						
•			111				•

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.

nonso Default Site · Sr TVA RFQ Vendor Re 🖗 💁 To 🛯 🛄 Reports 🕅 Start Center 🌛 Profile 🕷 Sign Out 💡 Help P IIM. Click the RFQ Lines tab. Workflow ¥ Fi 🖌 🗟 🔶 🏓 🧕 List RFQ Click Boxs Standards and Procedures Specifications Quotations RFQ 1052223 Purchasing Parts for WBN Trucks Site GC Status OPEN Attachments View/Att Freight Terms Buyer UNIFEN6CW Tilley, Zachary Eugene 訇 Required Date 04/13/2015 Ship Via Priority 0 Reply Date Ship Type Туре Status Date 04/06/2015 4:17 PM Payment Terms 0 % 0 DISC DAYS 45 NET DAYS Vendor Reference FOB Point 揈 Ship To SEEINS SEE PO INSTRUCTIONS Reply To SEE PO INSTRUCTIONS Address Address City City State/Province State/Province ZIP/Postal Code ZIP/Postal Code Attention 揈 Attention

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

TVA RFQ Vendor Response - Defau	Click the Quotation	ns tab. ☑ 🖬 🔌 🔶 🕬	io Let Reports P Start Center P Workflow	Profile 《Sign Out 《Help 正言詞。
List RFQ RFQ Lines Clin	KaBOXs Standards and Proced	ures Specifications		
RFQ 1052223 Purchasing Parts fo	r WBN Trucks	a	Site GC	Status OPEN
RFQ Lines > Filter > () = > > = 1 - 1 (of 1 🚽			다 <u>Download</u> : 트
Line 🔶 Iter	m Description		Quantity	Order Unit
	Truck Parts		10.00	
Technical Terms and Conditions for Item	Filter > = = 0 - 0 of 0	Lige Contract of C		🕞 <u>Download</u> 🚍
	Sequence 💠 Term	Description	Revision	<u>1#</u>

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

TVA RFQ Vendor R	Response - Default Site : !	SC	₽ <u>B</u> ulletins: (0)	<u> <u> </u></u>	🕅 Start <u>C</u> enter	Profile X Si	gn Out ? <u>H</u> elp) IIM.
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Vendor								
Vendors Filter > ()	+ + = 1 - 1 of 1 =						ſ	Download
<u>Vendor</u>	Description							
555555555-00	XYZ Inc.		12					
Quotations for Vendor	Filter > Ci Ci + + +	0 - 0 of 0 🖤					1	Download
Line Item [Description	Manufacturer	Description		Quantity Ord	er Unit		Unit Cost
				Click	the Selec	et RFQ Lin	seitaid	KFBoxines

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

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				6	}			
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RF	Q 1052223 Purchasing Parts for WBN Truck	s 👌			Site GC		Status OPE	N
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555								
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	Line tem Description		Storeroom	Quantity	Order Unit	Conversion Fa	actor Location	GL Debit E
	Truck Parts			10.00		۹ 1.000	000	100046: 👻
	× ·	m						•
	Click the Line 1 check box.						ОК	Cancel

Slide notes

Text Captions

Click the Line 1 check box.

Slide 60 - Submitting an Open RFQ Response

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Slide notes

Text Captions

Click the **OK** button.

Slide 61 - Submitting an Open RFQ Response

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5555555555-00	XYZ Inc.		b				
Quotations for Vend	lor 55555555555-00 🌶 Filter 🖂	1 - 1 of 1					Et Download
Line Ite	m <u>Description</u>	Manufacturer	Description	Qua	ntity Order Unit		Unit Cost
1	Truck Parts			1	0.00		
Click the V	iew 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

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Line Item	Description	Manufacturer	Description	Qua	ntity Order Unit			Unit Cost
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Line 1			Manufactur	er				ಶ
Line Type MATERIAL	X		Mfg Part Numb	er				
Item	Truck Parts		😫 🛛 Stock Catego	ry				
Remarks		<mark></mark> 複	Catalog	#				
	Quantity and Costs				Details			
Qua	intity 10.00			Quote Start	Date			
Order	Unit			Quote End	Date			
Unit	Cost			Required	Date 04/30/201	5		
Line	Cost 0.00			Delivery	Date			
							Select RFC	2 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.

Slide 63 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC		9 <u>B</u> ulletins: (0) 🌾	≥ <u>G</u> o To <u>№ R</u> eports	☆ Start <u>C</u> enter	[≱] <u>P</u> rofile × <u>S</u> ign Ou	it ⁹ Help IIM.
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Quotations for Vendor 55555555-00 Finer >	1 4 4 1 - 1 of 1 +					S7 Download
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		Line Item	I.			
Line 1		Manufacturar		0		*2
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tem Truck Barta	*3	Stock Catagoon				
Remarka	*3	Catalan #				
Remarks		Catalog #	•			
Quantity and Costs				Details		
Quantity 10.00			Quote Start	Date		
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Unit Cost			Required	Date 04/30/2015		
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Slide notes

Slide 64 - Submitting an Open RFQ Response

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Slide notes
Slide 65 - Submitting an Open RFQ Response

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Item	Truck Parts		🔡 Stock Ca	itegory						
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(Quantity 10.00				Quote Start D	ate				
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Li	ine Cost 0.00				Delivery D	ate				
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Slide notes

Text Captions

Slide 66 - Submitting an Open RFQ Response

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Quotations for Vendor 555555555-00	1 - 1 of 1				🕑 <u>Download</u> 😑
Line Item Description	Manufacturer	Description	Quantity	<u>v</u> Order Unit	Unit Cost
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		Line Item			
Line 1		Manufacture	er		b
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Quantity and Costs				5 <u>6</u> 7 8 9 10 11	
Quantity 10.00			Quote Start Dat	te 19 20 21 22 23 24 25	
Order Unit			Quote End Dat	26 2 4 28 29 30 1 2 te 3 4 5 6 7 8 9	
Unit Cost 150.000000			Required Dat	te 2010 2015 2016	
Line Cost 1,500.00			Delivery Dat	te	
					Select RFQ Lines

Slide notes

Text Captions

Slide 67 - Submitting an Open RFQ Response

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RFQ 1052223 Purchasing Parts for WBN Tr	ucks 👌		Site GC	Status OPEN
Vendor				
Vendors Filter >>> - 1 of 1	Click an	ywhere to con	tinue.	Download
Vendor Description				
5555555555-00 XYZ Inc.		2		
				0
Quotations for Vendor 555555555500 Filter >	2 2 2 =1-1 of 1 =	Contract Marchael		E7 Download
Line Item Description	Manufacturer	Description	Quantity Order Unit	Unit Cos
1 Truck Parts		199	10.00	150.00000
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Line 1		Manufacturer		
		Mfg Part Number		
Item Truck Parts		Stock Category		
Remarks	問	Catalog #		
Quantity and Costs			Details	
Quantity 10.00			Quote Start Date	
Order Unit			Quote End Date	
Unit Cost 150.00000			Required Date 04/30/201	5
Line Cost 1,500.00			Delivery Date 04/20/201	<u>s</u>
				Select RFQ Lines
L				

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		<u>B</u> ulletins: (0) 🏟 Go To 🔟 <u>R</u> ep	orts 🏠 Start <u>C</u> enter 🔒 <u>P</u> rofile	Kaign Out V Help
▼ Find:	Select Action	🖓 🗔 🍬 🌳 🖉 ^{Work}	flow	
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RFQ 1052223 Purchasing Parts for WBN Truck	s 👸	Click the Save		Status OPEN
Vendor				
Vendors Filter > 0 = + + + 1 - 1 of 1				🖏 <u>Download</u> 🚍
Vendor Description				
555555555500 XYZ Inc.		a		
Quotations for Vendor 5555555555-00	• • • 1 - 1 of 1 →			E/ Download
Line Item Description	Manufacturer Desc	ription	Quantity Order Unit	Unit Cost
 Truck Parts 			10.00	150.000000
		ine Item		
Line 1		Manufacturer		1
Line Type MATERIAL		Mfg Part Number		
Item Truck Parts	1	Stock Category		
Remarks	包	Catalog #		
Quantity and Costs			Details	
Quantity 10.00		Quote	Start Date	
Order Unit		Quote	End Date	
Unit Cost 150.000000		Requ	uired Date 04/30/2015	
Line Cost 1,500.00		Deli	very Date 04/20/2015	
				Select RFQ Lines
				5.0 ····································
l				

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

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5555555555-00 XYZ Inc.		b		
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	Manufacturar	Depariation	Quantity Order Unit	List Cost
1 Truck Parts	Manufacturer	Description	10.00	150 000000
		Line Item		
Line 1		Manufacturer		[2]
Line Type MATERIAL		Mfg Part Number		
Item Truck Parts		Stock Category		
Remarks	ಶ	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
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Slide notes

Text Captions

Click the Route Workflow icon.

Slide 70 - Submitting an Open RFQ Response

TVA RFQ Vendor Response - Default Site : SC	P <u>B</u> ulletins BMXAA4411I - Process RFQP	: (0) 🕐 Go To 🕮 <u>R</u> eports 🏠 Start <u>C</u> enter 🗍 ROCESS started.	Profile 🕷 Sign Out 🤋 Help 📰 👘 🖉
🔽 Find:	Select Action	🔷 🌳 🗶 ^{Workflow}	
		245	
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RFQ 1052223 Purchasing Parts for WBN Trucks	也	Site GC	Status OPEN
Vendor			
Vendors Filter I and I a	🔍 Manual Input		만 <u>Download</u> : 드
555555555500 XYZ Inc.			
Quotations for Vendor 555555555-00			Ey <u>Download</u>
Line Item Description I	Bid No Bid	<u>/ Order Unit</u> D	Unit Cost 150.00000
	Memo		
			<u>b</u>
tem Truck Parts		ClickKBox	
Remarks	19 (Catalo	
Quantity and Costs		Click the OK button.	
Quantity 10.00			
Order Unit		Quote End Date	
Unit Cost 150.000000		Required Date 04/30/2015	
		Dentery Balo Denterte	Select RFQ Lines

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

Ist RFQ RFQ Lines Quotations Standards and Procedures Specifications Recommendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Vendor Vend	TVA RFQ Vendor Response - Default Site : SC	P BMXAA4412I - Proces	Bulletins: (0) 🏟 Go To 😐 s RFQPROCESS stopped.	<u>4 R</u> eports № Start <u>C</u> enter ▲ <u>P</u>	rofile 🔏 <u>S</u> ign Out 💡 <u>H</u> elp。
List RFQ RFQ Lines Quotations Standards and Procedures Specifications RFQ 1052223 Purchasing Parts for WBN Trucks Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Vendor Vendor Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Vendor Description S5555555-00 XYZ Inc. Quotations for Vendor 55555555500 XYZ Inc. Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Line Item Description S5555555500 Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Vendor Description S5555555500 SYZ Inc. Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Quotations for Vendor 5555555500 XYZ Inc. Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid. Line Item Description Quantity Order Unit Image: Commendation: Send an email message to your TVA Buyer statin that you have submitted a bid.	✓ Find: 前	elect Action	• 🖬 🔷 🔶 🖉	Workflow	
55555555-00 XYZ Inc. Quotations for Vendor 5555555500 Filter > 1 - 1 of 1 Line item Description Manufacturer Description Quotations Quantity Order Unit Inc. Line item	ist RFQ RFQ Lines Quotations S FQ 1052223 Purchasing Parts for WBN Trucks Vendor Moors Filter 1-1 of 1 dor Description	Standards and Procedures Sp	ecifications	Recommendatic message to you that you have su	on: Send an email r TVA Buyer stating ıbmitted a bid.
Quotations for Vendor 5555555500 Filter > 1 + 1 of 1 C* Do Line Item Description Manufacturer Description Quantity Order Unit 1 Truck Parts 10.00 1	5555555-00 XYZ Inc.		1		
Line Item	otations for Vendor 55555555500 Filter > 1	anufacturer Descr	iption	Quantity Order Unit	Download Discrete
	1 HUKFaita	Ľ	ine Item	10.00	150.00000
Line Type MATERIAL V tem Truck Parts Stock Category Remarks Catalog #	Line 1 e Type MATERIAL V Item Truck Parts emarks	Click anywho	ere to continue.		
Quantity and Costs Details	Quantity and Costs			Details	
Quantity 10.00 Quote Start Date Order Unit Quote End Date Unit Cost 150.00000 Line Cost 1,500.00 Delivery Date 04/20/2015 Select RFQ L	Quantity 10.00 Order Unit		C	Quote Start Date Quote End Date Required Date 04/30/2015 Delivery Date 04/20/2015	Select RFQ Lines

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 Ver	ndor Response - Default Site : !	SC BMX4	Bulletins: (0) Bulletins: (0)	k Box IIII Reports	* Profile X Sign Out Y Help
	Find:	Select Action (Click the Go To link.	∠ Workflow	
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RFQ 1052223	Purchasing Parts for WBN Tr	ucks	a	Site GC	Status OPEN
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Vendor	Description				
5555555555-00	XYZ Inc.		<u>a</u>		
Quotations for Ven	dor 555555555.00	1-1 of 1			🗟 Download 🗄 🗖
Line the	em Description	Manufacturer	Description	Quantity Order Unit	Unit Cost
<u>→ 1</u>	Truck Parts	mananaotaron	boonplon	10.00	150.000000
			Line Item		
Line	1		Manufacturer		
Line Type MATERIA	L		Mfg Part Number		
Item	Truck Parts		Stock Category		
Remarks		掏	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

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	P <u>B</u> ulletins: (0)	Go To Lu Reports 🕉 Si Condition Reports 🕨	iart <u>C</u> enter 🏼 👌 <u>P</u> rofile	🛪 Sign Out 💡 Help 📰 📰
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		G	Pul Click iBgx		
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RFQ 1052223 Purchasing Parts for WBM	Click the Purchas	sing menu item	Site GC		Status OPEN
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Vendors Filter > 1 - 1 of 1					🖒 <u>Download</u> 👘 🚍
Vendor Description					
555555555500 XYZ Inc.		2			
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Quotations for vendor ssessesses-uo Priter >	Manufactures	Description	Quantity		
I Truck Parts	Manufacturer	Description	<u>duantity</u> <u>0</u> 10.00	<u>irder Unit</u>	150 000000
		Line Item			
Line 1		Manufacturer			
Line Type MATERIAL		Mfg Part Number			
Item Truck Parts		Stock Category			
Remarks	b	Catalog #			
Quantity and Cos	ts			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
l					

Slide notes

Text Captions

Click the **Purchasing** menu item.

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								Companie	s (NUC)			
List	RFQ RF	Q Lines Quota	ations Standards and Procedures		Specifications		_	Purchase	Orders	-		
RFQ 105	2223	Purchasing Parts for \	VBN Trucks	b		Site			K BOXdor	Response	PEN	
		-						TVA RFQ	Vendor R	esponse		
Vendor			Click the TVA eRFQ	Ven	dor Res	ponse menu i	item					
Vendors	▶ Filter > ()	+ + + 1 - 1 of 1				- In In.					D)	Download -
Vendor	na na m	Descriptio	n									
5555555555	-00	XYZ Inc.			<u></u> †⊒							
Quotations	for Vendor 55	5555555.00 b Filte	r								C# J	Download : -
Quotations	Line Hem	Description	Manufacturar	Dec	orintion	0.00	untitu O	rder lleit				Unit Cont
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Item		Truck Parts		1	Stock Categ	ory						
Remarks			볞		Catalo	ig #						
		Quantity and	Costs					Details				
	Quant	thy 10.00		_		Quote Start	t Date		1			
	Order II	Init				Quote End	Date					
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javascript:	void(0);											

Slide notes

Text Captions

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

Slide 75 - Submitting a Targeted eRFQ Response

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eRFQ	Description	Status	Buyer	Nam	ne Required Date	Reply Date	eRFQ Im	plications? Site	
			P	>>		B	=Y	2	
key	Press the Enter key on your board to search for the eRFQs.	For more search To enter a new	n options, use th record, select t	ne Advance	d Search button. on in the toolbar.				
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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
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(G) T	VA eRFQ Vendo	or Response - C)efault Site : SC		9 [ulletins: (0) 🤆	o To 🔟 <u>R</u> eports 🕅 Star	t <u>C</u> enter 🔺 <u>P</u> rofile 🚜 g	<u>S</u> ign Out 3 <u>H</u> elp	IEM.
	•	Find:	# 7	Select Action	×	🕞 🖗 🖗	Vorkflow			
List	eRFQ	eRFQ Lines	Quotations	Standards and Procedu	res S	pecifications	Click any	where to cont	inue.	
RFQs	Filter > 💏 🏢	\$≥ :	1 - 2 of 2							C)
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978119	Generated I	by Reorder 8/9/10) 4:56 PM.	OPEN	0CD1	22570 Wel	h, Mary D			СТ
				 Select the Select the Enter the compliant 	e eRFQ e eRFQ Unit Co ce with	lines. ost (must l	be in ig contract).			
•				4. Save the 5. Submit th	eRFQ. e eRF(Ω.				

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 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

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



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 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

	PT000117 •
Enterprise Management Management Program	M
	Search 🔁
Welcome to the Supply Chain Community. Enabled by the new EAM technology, TVA is incorporating the major cor including supply chain. Having all the major processes in one system, w supply chain, allows Supply Chain to enhance our customer support and Supply Chain's mission is to deliver a substantial, sustainable, competiti effectively executing sourcing, materials management, and support ser and support good corporate citizenship. If you have any questions, please email Supplier Connections at supplie	Chain Supplier Information Edit Supplier Details Purchase Orders Purchase Or
	III

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

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4									
									*

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 Sul	ocontracting Accomplishm	ents - Default Site : SC	₽ <u>B</u> ulletins: (0)	∕∂ <u>G</u> o To <u>III R</u> eports	🕅 Start <u>C</u> enter 🏼 Å <u>P</u> rofile 🕴	Sign Out ? Help IBM.
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5555555555-00	XYZ Inc.		2013 Q4: 07/01/2013 - 09/30/2013	3	15,84	5 9552
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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 Sul	ocontracting Accomplishmer	nts - Default Site : SC	P <u>B</u> ulleti	ns: (0) 🏟 <u>G</u> o To 🛄 <u>R</u> eports	🕯 🛱 Start <u>C</u> enter 🔺 <u>P</u> r	ofile 🛛 🕺 <u>S</u> ign Ou	ıt ? <u>H</u> elp	IIM.
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Vendor	Description		Reported Date			Plan ID Contra	ct Reference P	0
555555555-00	XYZ Inc.		2014 Q3: 04/01/2014 - 06/3	30/2014		15,845 9552		
55555555555-00	XYZ Inc.		2013 04: 07/01/2013 - 09/	30/2013		15,045 9552		
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•			III					Þ

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.

TVA Subcontracting Accomplishments - Default Site : SC ports 🛯 🛱 Start <u>C</u>enter 👎 <u>P</u>rofile 🛛 🕺 <u>S</u>ign Out 💡 <u>H</u>elp R Go To IIII R IIM, Workflow Y Find: 🛱 🤝 Select Action 💽 🔠 🗔 ᡇ 🌳 List Main Vendor Plan ID 35,488 Plan ID P Q Vendor D Contract Deferance Reported Date Click the Select Value icon. Get Total Amount for Invoices Paid Reporting Frequency Total Invoices Paid Amount \$ Total Large Business Actual \$ % Goals % Total Small Business Actual \$ % Total Spend Actual \$ - Corporate Plan Only % Goals % Minority Business / Small Disadvantaged Business Actual \$ % Goals % Woman-Owned Small Business Actual \$ % Goals % HUBZone Small Business Actual \$ Goals % Veteran-Owned Small Business Actual \$ % Goals % Service-Disabled Veteran-Owned Small Business Actual \$ % Goals % Valley Business Actual \$ % Comments

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

TVA Subcontracting Accomplishm	ents - Default Site : SC	P <u>B</u> ulletins: (0)	∲ <u>G</u> o To <u>Iu R</u> epor	is 👘 Start <u>C</u> enter	Profile Sign Out	? <u>H</u> elp	IBM.
Find:	前 🔽 Select Action	v 🖲 🖬	Vorkflov	1			
List Main							_
	Vendor Plan ID 35,488						
Please Use Selector to Enter Reported Dat	e and Plan ID	Plan Information					-
Plan ID*	Select Value			E [3		
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Get Total Amount for Invoices R	/ Filter >∰ = + + + 1 - 1 of 1			E/ Download			
Total Invoices Paid Amount \$	Plan ID Vendor	Description Contrac	t Reference PO	Plan Type			-
Actuals	15.845 5555555555	XYZ Inc. 9552		1	Soals		-
		10 45 045		Cancel	Goals %		
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Minority Busines	s / Small Disadvantaged E		%		Goals %		
	Woman-Owned Small Business Actual \$		%		Goals %		
	HUBZone Small Business Actual \$		%		Goals %		
	Veteran-Owned Small Business Actual \$		%		Goals %		
Service-Disable	d Veteran-Owned Small Business Actual \$		%		Goals %		
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Slide notes

Text Captions

Click Plan ID 15,845.

Slide 87 - Creating a Record

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Veteran-Owned Small Business Actual \$		%	Goals %	3.00
Service-Disabled Veteran-Owned Small Business Actual \$		%	Goals 9	3.00
Valley Business Actual \$		%	Goals %	0 70.00
lle on Commande				
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

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Ak Pinds Antin		Workflov	V	
Move your mouse pointer over each field in the Plan Information section for a description.	Click her	re when yo	ou are ready to contin	nue.
Please Use Selector to Enter Reported Date and Plan ID	Plan Information			e
Plan ID * 15,845 🔑	Vendor	555555555-0 🖉)	
Reported Date*	Contract Reference	9552		
	PO			
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Minority Business / Small Disadvantaged Business Actual \$		%	Goals %	5.00
Woman-Owned Small Business Actual \$		%	Goals %	3.00
HUBZone Small Business Actual \$		%	Goals %	3.00
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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

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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

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Slide notes

Text Captions

Click the 2015 Q2 value.

Slide 91 - Creating a Record

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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

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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

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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

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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

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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

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

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

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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

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555555555-00	XYZ Inc.	2013 Q	4: 07/01/2013 - 09/30/2013		15,845 9552	
		Only the A	ctual amounts are edit	table.	1	
		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.



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

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



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

		PT000117 -
ENTER Management		
		Search 🔁
Welcome to the Supply Chain Community. Enabled by the new EAM technology, TVA is i including supply chain. Having all the major p supply chain, allows Supply Chain to enhance Supply Chain's mission is to deliver a substar effectively executing sourcing, materials mar and support good corporate citizenship. If you have any questions, please email Supp	incorporating the major components of the work management processes in one system, we ever customer support and ntial, sustainable, competition agement, and support service strategies that satisfy two support service strategies that satisfy two support service strategies that satisfy two supports processes in a supplier connections@tva.gov	Image: Contract link. Image: Argon contract link. Process, Image: Argon contract link. Image: Argon contract link. Im

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

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to retrie	eve the purchas	e contracts.	er a new record, s	select the Inse	rt icon in the to	oibar.					

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

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Slide notes

Text Captions

Click Contract 9552.

Slide 105 - Revising a Purchase Contract

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Dhana	John Doe			-							

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

		Y Find:		n Select Action	💽 🖲 🗟 🔶	2 🔿 1				
ist	Contract	Contract Line	es	Costs Standards and Procedures			2			
					Click the Sel	ect Action	drop-do	wn a	arrow.	
	Contract	9552	Truc	k Parts	_		12		BENERAL	
	Revision	3	Updat	e pricing and delivery times	10			S	tatus APPR	
Cor	ntract Code	Material 🔑								
ract Li	ines 🕨 Filte	er > ()) ()	1	- 10 of 10					C	Downloa
ine 💠 🛛	Line Type	ltem		Description		Quantity	Order Unit		Unit Cost	Line Co
1	ITEM	CWD987Q	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	[1] [1] [1] [1] [1] [1] [1] [1] [1] [1]	1.00	EA	2	20.000000	20.
2	ITEM	CWD988N	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	[1]	1.00	EA	P	25.000000	25.
3	ITEM	CWD989L	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	b	1.00	EA	P	30.000000	30.
4	ITEM	CWD990F	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	[2]	1.00	EA	P	35.000000	35.
5	ITEM	CWD991D	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	혢	1.00	EA	P	40.000000	40.
7	ITEM	CWD992B	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	혢	1.00	EA	P	45.000000	45.
8	ITEM	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	혢	1.00	EA	2	50.000000	50.
10	ITEM	CWD994V	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	ಶ	1.00	EA	2	55.000000	55.
11	ITEM	CWD995R	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	b	1.00	EA	2	60.000000	60.
12	ITEM	CWD996P	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	複	1.00	EA	P	65.000000	65.

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 1	107 -	Revising	α Ρι	ırchase	Contract
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B	Purchase Con	tracts - Default S	Site : S	2		🤑 <u>B</u> ulletins: (0) 🛛 🏟 Go	Fo 🔟 <u>R</u> eports 🏠 :	Start <u>C</u> enter 🤌 <u>P</u> ro	ofile 🔻 <u>S</u> ign Out 🤋 <u>H</u> elş) IIM.
Lis	st Contract Contract Revision Contract Code	Find: Contract Lin 9552 3 MATERIAL	es Trucł Update	Costs Parts e pricing and	Select Action Revise Click/Box(PORT Workflow Add to Bookmarks View History Cenvery times	Click the Revis	♦ 2 2 1 Se Contract enu item.	Vorkflow	ype TVA GENERA atus APPR	4
Cont	ract Lines 🏾 🐌 Fili	ter > () ([])) 4	= 1-	10 of 10						🕅 Download 🗖
L	ine 💠 Line Type	ltem		Description			Quantity	Order Unit	Unit Cost	Line Cost
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	3 ITEM	CWD989L	>>	TRUCK,AUT	TOMOTIVE, QA 0, FLATBED	鍧	1.00	EA 🔎	30.00000	30.00 🍿
•	4 ITEM	CWD990F	>>	TRUCK,AUT	OMOTIVE, QA 0, FLATBED	鍧	1.00	EA 🔎	35.00000	35.00 🍿
•	5 ITEM	CWD991D	>>	TRUCK,AUT	TOMOTIVE, QA 0, FLATBED	鍧	1.00	EA 🔎	40.00000	40.00 🍿
•	7 ITEM	CWD992B	>>	TRUCK,AUT	OMOTIVE, QA 0, FLATBED	趨	1.00	EA 🔎	45.000000	45.00 🍿
	8 ITEM	CWD993X	>>	TRUCK,AUT	OMOTIVE, QA 0, FLATBED	趨	1.00	EA 🖉	50.00000	50.00 🏦
	10 ITEM	CWD994V	>>	TRUCK,AUT	OMOTIVE, QA 0, FLATBED	掏	1.00	EA 🔎	55.000000	55.00 🍿
•	11 ITEM	CWD995R	>>	TRUCK,AUT	OMOTIVE, QA 0, FLATBED	掏	1.00	EA 🔎	60.000000	60.00 🏦
•	12 ITEM	CWD996P	**	TRUCK,AUT	OMOTIVE, QA 0, FLATBED	1 1 1	1.00	EA P	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	🤑 <u>B</u> ulletins: (0) 🛛 🏟 <u>G</u> o T	'o <u>₩ R</u> eports ¥	Start <u>C</u> enter 🔒	<u>P</u> rofile X <u>S</u> ign	Out ? <u>H</u> elp	IIN.
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Contract Lines Filter >	Revise Contract					G	Download
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3 ITEM CWD989L >>	a Enter a description for the revised c	ontract. Click OK when finished.			2 30	.000000	30.00
4 (TEM CWD990F 33 5 (TEM CWD991D 33	Contract Reference 9552	*		a	P 35	.000000	40.00
▶ 7 [TEM] CWD992B ≫ ▶ 8 [TEM] CWD993X ≫					A 45	.000000	45.00 💼 50.00 💼
10 ITEM CWD994V ≫ 11 ITEM CWD995R ≫			ОК	Cancel	P 55	.000000	55.00 💼 60.00 💼
▶ 12 ITEM CWD996P >>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	눦	1.(DO EA	۵ (65	.000000	65.00 👕

Slide notes

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

Slide 109 - Revising a Purchase Contract

	Purchase Cor	ntracts - Default Site		<mark>9</mark> <u>B</u> ulletins: (0) 🖗 <u>G</u> o To	o <u>I⊡ R</u> eports no Stari	<u>C</u> enter ² Pro	file 🔻 <u>S</u> ign Out 1	? <u>H</u> elp <u>12</u>
		Find:	🕅 🔝 Select Action	v 🐌 🖬 🍬 🤅	2 3 1	Workflow		
List	Contract	Contract Lines	Costs Standards and Procedu	res		-		
	Contract	9552	Truck Parts	a			Type TVA GE	NERAL
	Revision	3 U	pdate pricing and delivery times	构			Status APPR	
	Contract Code	MATERIAL 🔑						
ntra	ct Lines 🐌 Fil	lter > > 1 0 👍	<u>(</u>					Download
Lin	e 🔶 Line Type	ltem	Revise Contract				Unit Cos	st Line Cos
	1 ITEM	CWD987Q	×			2	20.00000	20.00
	2 ITEM	CWD988N	8			P	25.00000	0 25.0
	3 ITEM	CWD989L	2 Enter a description for the revised of	ontract Click OK when finished		2	30.00000	0 30.0
	4 ITEM	CWD990F	S Litter a description for the revised of	s		P	35.00000	0 35.0
	5 ITEM	CWD991D	Scontract Reference 9552	Update pricing and delivery time		×	40.00000	0 40.0
	7 ITEM	CWD992B	>> Revision 4			P	45.00000	0 45.0
	8 ITEM	CWD993X	»			P	50.00000	0 50.0
	10 ITEM	CWD994V	×		OK Can	cel 🔎	55.00000	0 55.0
	11 ITEM	CWD995R	×				60.00000	0 60.0
	12 ITEM	CWD996P	>>> TRUCK, AUTOMOTIVE, QA 0, FLATBED	包	1.00 EA	P	65.00000	0 65.0
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Slide notes

Slide 110 - Revising a Purchase Contract

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Find: Ke	ect Action		🔶 🖉 🌫	₩orkflov	/		
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Contract 9552 Truck Parts		档			Type	TVA GENERAL	
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2 ITEM CWD988N					0	25.000000	25.00 m
3 ITEM CWD989L >> 25 5 4 4					0	30.000000	30.00 🏦
A ITEM CWD990F	scription for the revised	I contract. Click OK when finishe	ed.		0	35.000000	35.00 🏦
5 ITEM CWD991D X	nce 9552	* Update pricing and delivery t	time	×	0	40.000000	40.00 🏦
7 ITEM CWD992B >>> Rev	sion 4				0	45.000000	45.00 🏦
8 ITEM CWD993X >>					0	50.000000	50.00 🏦
▶ 10 ITEM CWD994V >>			ClickBox	Cancel	2	55.000000	55.00 🏦
11 ITEM CWD995R >>				Cancer	0	60.000000	60.00 🏦
12 ITEM CWD996P >> TRUCK,AUTO	IOTIVE, QA 0, FLATBEI	0		1.00 EA	0	65.000000	65.00 🍿
		Click the OK bu	tton.				

Slide notes

Look this over and then click OK.

Text Captions

Click the **OK** button.

Slide 111 - Revising a Purchase Contract

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	[✓ Find:	Å ▼	Select Action 🛛 😧 🛃 🍦 🍫 📿	Workflov	W	
					**		
List	t Contract	Contract Lines	Costs	Standards and Procedures			
	Contract 9	552 Tr	uck Parts	 [1] [1] [1] [1] [1] [1] [1] [1] [1] [1]		Type TVA GENER	AL
	Revision	3 Up	date pricing and	I delivery times		Status APPR	
	Contract Code M		i đ				_
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Contra	act Lines 🛛 🕨 Filter	DA [2]		System Message			By Download
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•	2 ITEM	CWD988N >>				25.00000	25.00 👕
•	3 ITEM	CWD989L 🔉	3 Enter	or more open purchasing documents. Documents PO 765582, PO		₽ 30.00000	30.00 👕
•	4 ITEM	CWD990F >>	Contract Re	753853, PO 736740, PO 736877, PO 711710-1, PO 759988, PO	× ta	₽ 35.00000	35.00 👕
•	5 ITEM	CWD991D >>		757219, PO 753408, PO 711604, PO 747571, PO 728952, PO 731085,		A0.000000	40.00 🍿
•	7 ITEM	CWD992B 🔉		PO /19972, PO /44107, PO /28925 currently reference this contract revision. Do you want to proceed?		A2:000000	45.00 🍿
	8 ITEM	CWD993X				₽ 50.00000	50.00 🍿
•	10 ITEM	CWD994V 💦			Cancel	₽ 55.00000	55.00 🍿
•	11 ITEM	CWD995R 🔊		ClickiBoxi		ρ 60.00000	60.00 👕
	12 ITEM	CWD996P »	TRUCK,AL	10m01112, w10, 1011020 1.	EA EA	۵5.00000 (65.00 🍿
				Click the OK button.			

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 Cor	ntracts - Default S	iite : S	C	₽ <u>B</u> ulletins: (0) 🖗 <u>G</u> o To	<u>I™ R</u> eports か	Start <u>C</u> enter	<u>Profile</u>	¥ <u>S</u> ign Out	IIN.
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Li	st Contract	Contract Line	es	Costs Standards and Procedures	-					
			_							
	Contract	9552	Truc	k Parts	2				Type TVA GENERA	
	Revision	4	Updat	te pricing and delivery time	a	_		St	tatus VDRAFT	
	Contract Code	MATERIAL 🔑								
Cont	ract Lines 🕴 Fil	lter > 👋 🗊 🛊 🖕	1	- 10 of 10					[Download
	<u>Line 💠 Line Type</u>	<u>Item</u>		Description		Quantity	Order Unit		Unit Cost	Line Cost
•	1 ITEM	CWD987Q	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	1	1.00	EA	P	20.000000	20.00 📋
	2 ITEM	CWD988N	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	鍧	1.00	EA	P	25.000000	25.00 🎁
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1 (Click the V	iew Details	icc	Dn. CK,AUTOMOTIVE, QA 0, FLATBED	掏	1.00	EA	P	35.000000	35.00 🎁
				K,AUTOMOTIVE, QA 0, FLATBED	掏	1.00	EA	2	40.000000	40.00 🍿
	TEM	CWD992B	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	掏	1.00	EA	2	45.000000	45.00 🍿
	8 T M	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	掏	1.00	EA	P	50.000000	50.00 🍿
	10 ITEM	CWD994V	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	鍧	1.00	EA	P	55.000000	55.00 🍿
•	11 ITEM	CWD995R	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	掏	1.00	EA	P	60.000000	60.00 🍿
•	12 ITEM	CWD996P	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	ಶ	1.00	EA	P	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 Con	tracts - Default Si	te : SC		<mark>₽</mark> <u>B</u> ullet	ins: (0) 🏾 🏟 <u>G</u> o To	IIII <u>R</u> eports	ີ Start	<u>C</u> enter ^à <u>P</u> rofil	e X <u>S</u> ign O	ut <u>? H</u> elp	IBM
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Contract Revision Contract Code	9552 4 MATERIAL &	Truck Parts Update pricing an	d delivery time		<u>청</u>			6	Type Status	TVA GENERAI VDRAFT	
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Line + Line Type	Item	Descriptio	n			۵	uantity	Order Unit		Unit Cost	Line
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▶ 2 ITEM	CWD988N	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		 割		1.00	EA	0	25.000000	2
▶ 3 ITEM	CWD989L	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		鍧		1.00	EA	0	30.000000	3
▶ 4 ITEM	CWD990F	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		割		1.00	EA	0	35.000000	3
5 ITEM	CWD991D	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		詢		1.00	EA	0	40.000000	4
> 7 ITEM	CWD992B	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		鍧		1.00	EA	0	45.000000	4
8 ITEM	CWD993X	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		쒏		1.00	EA	P	50.000000	5
▶ 10 ITEM	CWD994V	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		쒏		1.00	EA	0	55.000000	5
▶ 11 ITEM	CWD995R	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		詢		1.00	EA .	P	60.000000	6
▶ 12 ITEM	CWD996P	>> TRUCK,A	UTOMOTIVE, QA 0, FLATBED		鍧		1.00	EA .	P	65.000000	6
				Line	Item						
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Line	1				Description	SNORKEL					
					Mfg. Part Number	PT-000-111		Click	inside t	he scroll	bar.
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QA Level 0											
Green Procurement H	P										
Q	uantity and Costs					Details					
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1			Status PNDREV								>

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

3	Purchase (Contracts - Defaul	It Site : SC		<mark>9</mark> <u>В</u> и	lletins: (0) 🖗 <u>G</u> o To	<u>I⊡ R</u> eports	🕅 Stari	<u>C</u> enter	A <u>P</u> rofile 🔀 <u>S</u>	<u>S</u> ign Out ? <u>H</u> elp	IEM.
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+	2 ITEM	CWD988N	>> 1	TRUCK, AUTOMOTIVE, QA 0, FL/	ATBED	<u>†</u>		1.00	EA	P	25.000000	2 ^
	3 ITEM	CWD989L	>>	RUCK, AUTOMOTIVE, QA 0, FL	ATBED	鍧		1.00	EA	P	30.000000	3
	4 ITEM	CWD990F	>>	RUCK, AUTOMOTIVE, QA 0, FL	ATBED	鍧		1.00	EA	P	35.000000	3
•	5 ITEM	CWD991D	>> 1	RUCK, AUTOMOTIVE, QA 0, FL	ATBED	혢		1.00	EA	P	40.000000	4
	7 ITEM	CWD992B	>> 1	RUCK, AUTOMOTIVE, QA 0, FLA	ATBED	쳲		1.00	EA	P	45.000000	4
•	8 ITEM	CWD993X	>>	RUCK, AUTOMOTIVE, QA 0, FLA	ATBED	혢		1.00	EA	P	50.000000	5
•	10 ITEM	CWD994V	>>	RUCK, AUTOMOTIVE, QA 0, FLA	ATBED	詢		1.00	EA	٩	55.000000	5
	11 ITEM	CWD995R	>>	RUCK, AUTOMOTIVE, QA 0, FLA	ATBED	詢		1.00	EA	2	60.000000	6
•	12 ITEM	CWD996P	>> 1	RUCK, AUTOMOTIVE, QA 0, FLA	ATBED	揈		1.00	EA	P	65.000000	6
					Li	ine Item						
			Cove	rage		Manufacturer	987654459	>>				
	Line	1				Description	SNORKEL					
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	Hom	CWD9870 >>	TRUCK AUT			Commodity Group	25104		VEHICLE	FOUIPMENT CO	MPONENTS Mach	inery/Equip Pr
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	QA Level	0										
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		Quantity and Costs	3				Details					
		Quantity	1.00	Status								
		Order Unit [*] FA	-	Entered By		07000117				*:		
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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.

Slide 115 - Revising a Purchase Contract

3	Purchase (Contracts - Defaul	t Site : SC		<mark>9</mark> [<u>3</u> ulletins: ((0) 🖗 <u>G</u> o To	In <u>R</u> e	ports	i) Star	: <u>C</u> enter	Profile	X <u>S</u> ign Out	? <u>H</u> elp	IBM.
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	3 ITEM	CWD989L	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		鍧			1.00	EA	P	3	0.000000	3
	4 ITEM	CWD990F	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		鍧			1.00	EA	P	3	5.000000	3
•	5 ITEM	CWD991D	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		赹			1.00	EA	P	4	0.000000	4
	7 ITEM	CWD992B	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		鍧			1.00	EA	P	4	5.000000	4
•	8 ITEM	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		鍧			1.00	EA	P	5	0.000000	5
•	10 ITEM	CWD994V	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		詢			1.00	EA	P	5	5.000000	5
	11 ITEM	CWD995R	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		鍧			1.00	EA	۵	6	0.000000	6
•	12 ITEM	CWD996P	>>	TRUCK, AUTOMOTIVE, QA 0, F	LATBED		鍧			1.00	EA	P	6	5.000000	6
						Line Item									
			Co	verage			Manufacturer	9876	54459	>>					
	Line	1					Description	SNOF	RKEL						
	Line Type	ITEM ¥				Mf	fg. Part Number	PT-00	0-111						
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Slide notes

Slide 116 - Revising a Purchase Contract

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•	7 ITEM	CWD992B	>>	TRUCK,A	UTOMOTIVE, QA 0, FL	ATBED		1			1.00	EA	P		45.000000		4
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Slide notes

Slide 117 - Revising a Purchase Contract

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Slide notes

Slide 118 - Revising a Purchase Contract

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Slide notes

Slide 119 - Revising a Purchase Contract

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Slide notes

Slide 120 - Revising a Purchase Contract

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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

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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

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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

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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.

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Slide 124 - Demonstration

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

Slide 125 - Demo

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Slide 126 - Demo

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Slide 128 - Demo

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Slide 131 - Demo

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Slide 132 - Demo

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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



Slide 137 - Demo

Slide notes

Slide 138 - I	Demo
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Slide 140 - Demo

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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

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Slide 143 - Demo

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Slide 144 - Demo

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

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Slide 146 - Demo

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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	,
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Slide 158 - Demo

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Slide 161 - Demo

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Slide 162 - Demo

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Slide 163 - Demo

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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		_			_
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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

Purchase	Contracts - Default S	Site : S	C	₽ <u>B</u> ulletins	: (0) 🖗 <u>G</u> o To	<u>ሠ R</u> eports	Start <u>C</u> enter	[₽] <u>P</u> rofile	<mark>≭</mark> <u>S</u> ign Out ? <u>H</u> elp	IIM.
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▶ 3 ITEM	CWD989L	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		혢	1.00	EA	P	30.000000	30.00 👕
▶ 4 ITEM	CWD990F	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		혢	1.00	EA	2	35.000000	35.00 🍵
▶ 5 ITEM	CWD991D	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		혢	1.00	EA	2	40.000000	40.00 🍿
▶ 7 ITEM	CWD992B	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		혢	1.00	EA	2	45.000000	45.00 🍿
▶ 8 ITEM	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		혢	1.00	EA	2	50.000000	50.00 🍿
▶ 10 ITEM	CWD994V	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		혢	1.00	EA	2	55.000000	55.00 🍿
▶ 11 ITEM	CWD995R	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		鍧	1.00	EA	P	60.000000	60.00 👕
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Slide notes

Slide 170 - Demo

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•	3 ITEM	CWD989L	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		1.00	EA	2	30.000000	30.00 🍿
•	4 ITEM	CWD990F	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	鍧	1.00	EA	9	35.000000	35.00 🍿
•	5 ITEM	CWD991D	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	a	1.00	EA	0	40.000000	40.00 🍿
•	7 ITEM	CWD992B	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	b	1.00	EA	9	45.000000	45.00 🍿
•	8 ITEM	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	b	1.00	EA	9	50.000000	50.00 🍿
•	10 ITEM	CWD994V	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	a	1.00	EA	9	55.000000	55.00 🍿
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•	12 ITEM	CWD996P	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	ta 1	1.00	EA	P	65.000000	65.00 🍿

Slide notes

Text Captions

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

Slide 171 - Demo

	Purchase Con	tracts - Default S	ite : S	C	₽ <u>B</u> ulletins: (0) 🖗 <u>G</u> o To !	<u>ዜ R</u> eports 👘 Sta	rt <u>C</u> enter 🛛 <u>P</u> rofile 🕷 <u>S</u>	<u>S</u> ign Out 9 <u>H</u> elp	IBM.
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Slide notes

Slide 172 - Demo

				Workflow	
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st Contract	Contract Lines	Costs Standards and Proce	dures	ter -	
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ine + Line Type	Application Imp	ort			Unit Cost Line Co
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Slide notes

Slide 173 - Demo

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			Yes a second	***		
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ntract Lines 🕴 🕨 Fi	lter > 🗨	Application Im	Gelect Value Select Value Select Value			C/ Download
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Slide notes

Slide 174 - Demo

Purchase Contracts - Default Site : SC	₽ <u>B</u> ulletins: (0)	o To 🔟 <u>R</u> eports 🕅 Start <u>C</u> en	ter 🌲 <u>P</u> rofile 🔻 <u>S</u> i	gn Out <u>H</u> elp	IIM.
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Revision 5 Update pricing and delivery time	t a		Status	VDRAFT	
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4 ITEM CW Import Configuration				35.000000	35.00 👕
5 ITEM CW Import Comparation				40.000000	40.00
7 ITEM CW Import Field Specify Import Field		Browse	-	45.000000	45.00 📷
N 8 ITEM CW		OK	Cancel	50.000000	50.00
It's important to select the Im	port Preview?			55.000000 60.000000	60.00
12 ITEM CW Check box to verify that Maxi	mo does not		-	65.000000	65.00 m
encounter any errors.				00.000000	00.00
Click a	nywhere to cont	nue.			

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

3	Purchase Con	itracts - Defau	It Site : SC		₽ <u>B</u> ulletins: (0)	^р е <u>с</u> ото Ш	4 <u>R</u> eports 🕅 Start <u>C</u>	enter ⁴ <u>P</u> rofile 🌹	Sign Out ? <u>H</u> i	ep IN.
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Slide notes

Slide 176 - Demo

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• 5	5 ITEM	CW	Import Configuration	40.000000	40.00 🍿
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Slide notes

Slide 177 - Demo

Purchase Contracts - Default Site : SC	Bulletins: (0) 🖗 Go To 🔟 Reports 🏚 Start Center 🏄 Profile 🕷 Sign Out ? Help
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Slide notes

Slide 178 - Demo

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Slide notes

Slide 179 - Demo

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•	5 ITEM	CW	Import Configuration								40.000000	40.00 📋
•	7 ITEM	CW		Specify Im	port File C:\Users	\jbircher\Desktop\(Contract9552	-U Browse			45.000000	45.00 📋
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Slide notes

Slide 180 - Demo

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	Revision	5	Tot	tal number of documents	1			Status VDRAFT	1
	Contract Code	MATERIAL 🔑		Valid documents	1				
Cont	tract Lines 🕴 Fil	ter > > 🗇 🛊 🕴	Desute	Invalid documents				ſ	Download
	Line 💠 Line Type	ltem	Results	BMXAA56211 - The data	import preview i	node is successful.		Unit Cost	Line Cost
٠.	1 ITEM	CWD987Q						22.000000	22.00 📋
×	2 ITEM	CWD988N		This mes	sade indi	cates that no errors were		25.000000	25.00 👕
•	3 ITEM	CWD989L		encounte	red durin	a the import preview		30.000000	30.00 📷
•	4 ITEM	CWD990F		choodine		ig the import preview.		35.000000	35.00 👕
•	5 ITEM	CWD991D						40.000000	40.00 📷
•	7 ITEM	CWD992B						45.000000	45.00 📷
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	12 1121				Click any	where to continue.	ОК	53.00000	0.00

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 Si	te : SC	₽ <u>B</u> uiletins: (0) 🖗 <u>G</u> o To 🔟 <u>R</u> eports	🛱 Start <u>C</u> enter 🕹 <u>P</u> rof	ile 🔻 <u>S</u> ign Out Help	IIN.
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List Contract Contract Lin					
Contract 9552 Revision 5	File Name Contract9552- Total number of documents 1	Updated.csv		Type TVA GENERAL Status VDRAFT	
Contract Code MATERIAL	Valid documents 1 Invalid documents			74	Download :
Contract Lines > Filter > Line ← Line Type Item 1 ITEM CWD987Q 2 ITEM CWD988N 3 ITEM CWD989L 4 ITEM CWD998P 5 ITEM CWD991D 7 ITEM CWD992B 8 ITEM CWD993X 10 ITEM CWD994V 11 ITEM CWD995R 12 ITEM CWD996P	Results BMXAA56211 - The data import preview	mode is successful.		Unit Cost 22.00000 25.00000 30.00000 35.00000 40.00000 45.00000 55.00000 60.00000 65.00000	Download Image: Cost 22.00 Image: Cost 25.00 Image: Cost 30.00 Image: Cost 35.00 Image: Cost 40.00 Image: Cost 40.00 Image: Cost 55.00 Image: Cost 60.00 Image: Cost 65.00 Image: Cost

Slide notes

Slide 182 - Demo

	Purchase Con	tracts - Default S	iite : S	C	₽ <u>B</u> ulletins: (0) 🖗 <u>G</u> o To 🛛	<u>₩ R</u> eports 👘 Start <u>C</u> e	enter ^A Profile	¥Sign Out	p IIM.
		Find:		🕅 🔻 Select Action	- • • •	2 🔿 🏹	Workflow		
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	Contract Code	MATERIAL							
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Li	ne 💠 Line Type	<u>Item</u>		Description		Quantity Order	Unit	Unit Cost	Line Cost
•	1 ITEM	CWD987Q	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	a	1.00 EA	P	22.000000	22.00 📋
•	2 ITEM	CWD988N	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	b	1.00 EA	P	25.000000	25.00 🎁
•	3 ITEM	CWD989L	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	a	1.00 EA	P	30.000000	30.00 🎁
•	4 ITEM	CWD990F	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	複	1.00 🕰	P	35.000000	35.00 🍿
•	5 ITEM	CWD991D	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	혢	1.00 EA	P	40.000000	40.00 🍿
•	7 ITEM	CWD992B	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	複	1.00 EA	P	45.000000	45.00 🍿
•	8 ITEM	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	혢	1.00 EA	P	50.000000	50.00 🍿
•	10 ITEM	CWD994V	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	複	1.00 EA	P	55.000000	55.00 🍿
	11 ITEM	CWD995R	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED	複	1.00 EA	P	60.000000	60.00 👕
•	12 ITEM	CWD996P	>>	TRUCK,AUTOMOTIVE, QA 0, FLATBED	2	1.00 EA	P	65.000000	65.00 👘

Slide notes

Slide 183 - Demo

List Contract Contract Lines Costs Standards and Procedures Contract 9552 Truck Parts Image: Contract Code Image: Contract Code </th <th>Type Status</th> <th>TVA GENERAL VDRAFT</th>	Type Status	TVA GENERAL VDRAFT
Contract 9552 Truck Parts 19 Revision 5 Update pricing and delivery time 19 Contract Code MATERIAL P	Type Status	TVA GENERAL VDRAFT
Revision 5 Update pricing and delivery time to Contract Code MATERIAL P	Status	VDRAFT
Contract Code MATERIAL		
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8 ITEM CW		50.000000 50
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11 ITEM CW		60.000000 60
12 ITEM CW		65.000000 65

Slide notes

Slide 184 - Demo

Find: Contract Lines 2. 5. Update p ERIAL	Select Action Costs Standards and Prod arts ricing and delivery time	cedures	• • 2 - 2	Workflow		
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Slide notes

Slide 185 - Demo

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Slide notes

Slide 186 - Demo



Slide notes

Slide 187 - Demo

Purchase Contracts - Default Site : SC	₽ <u>B</u> ulletins: (0) 🖗 <u>G</u> o⊤o 🛄 <u>R</u> eports 🏠 Start <u>C</u> enter →	[♣] Profile XSign Out ? Help	IIN.
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Slide notes

Slide 188 - Demo

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Slide notes

Slide 189 - Demo

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Line + Line Type	ltem		Description	Quant	ty Order Unit		Unit Cost	Line Cost
▶ 1 ITEM	CWD987Q	>>	TRUCK,AU	System Message	EA	P ::	22.000000	22.00 📋
▶ 2 ITEM	CWD988N	>>	TRUCK,AU		EA	P	25.000000	25.00 🍿
> 3 ITEM	CWD989L	>>	TRUCK,AU		EA	P	30.000000	30.00 🍿
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▶ 5 ITEM	CWD991D	>>	TRUCK,AU	processed.	EA	P	40.000000	40.00 🍿
▶ 7 ITEM	CWD992B	>>	TRUCK,AU	F	EA	P	45.000000	45.00 🍿
► 8 ITEM	CWD993X	>>	TRUCK,AU	OK	EA	P	50.000000	50.00 🍿
▶ 10 ITEM	CWD994V	>>	TRUCK,AU		EA	P	55.000000	55.00 🍿
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Slide notes

Text Captions

This message indicates that the import was successful.

Click anywhere to continue.

Slide 190 - Demo

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л	Contract	Contract Lin	es	Costs	Standards and Procedures				
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ne	Line Type	ltem		Description	Quantit	y Order Unit		Unit Cost	Line C
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	4 ITEM	CWD990F	>>	TRUCK,AU	BNVAA70521. The impact was successful and 4 records wars	EA	2	35.000000	35
	5 ITEM	CWD991D	>>	TRUCK,AU	processed.	EA	2	40.000000	40
	7 ITEM	CWD992B	>>	TRUCK,AU	•	EA	P	45.000000	45
	8 ITEM	CWD993X	>>	TRUCK,AU	OK .	EA	P	50.000000	50
	10 ITEM	CWD994V	>>	TRUCK,AU		EA	P	55.000000	55
	11 ITEM	CWD995R	>>	TRUCK,AU	IOMOTIVE, WA V, FLATBED 🛛 👸 1.00	EA	P	60.000000	60
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Slide 191 - Demo

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► 8 ITEM	CWD993X	>>	TRUCK, AUTOMOTIVE, QA 0, FLATBED		掏	1.00	EA	2	50.000000	50.00 🍿
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Slide notes

Slide 192 - Demo

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▶ 2 ITEM	CWD988N	>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		혢		1.00	EA	P	25.000000	2
▶ 3 ITEM	CWD989L	>>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		혢		1.00	EA	P	30.000000	3
▶ 4 ITEM	CWD990F	>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		혢		1.00	EA	P	35.000000	3
5 ITEM	CWD991D	>>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		鍧		1.00	EA	P	40.000000	4
▶ 7 ITEM	CWD992B	>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		鍧		1.00	EA	P	45.000000	4
8 ITEM	CWD993X	>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		詢		1.00	EA	P	50.000000	5/
▶ 10 ITEM	CWD994V	>> TRUCK,AU	TOMOTIVE, QA 0, FLATBED		혢		1.00	EA	P	55.000000	5
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Slide notes

Slide 193 - Demo

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10 ΠΕΜ The next steps are	to save LATBED				5.000000	5
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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

3	Purchase C	Contracts - Defau	It Site : SC			ŧ	Bulleti	ns: (0) 🛛 🏟 <u>G</u> o	То	<u>₩ R</u> eports	🕅 Star	t <u>C</u> enter	A <u>P</u> rofile	🕷 <u>S</u> ign Out	? <u>H</u> elp	IBM.
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•	4 ITEM	CWD990F	>>	TRUCK,A	UTOMOTIVE, QA 0, FL	ATBED		1			1.00	EA	P	35	.000000	3
•	5 ITEM	CWD991E	>>>	TRUCK,A	UTOMOTIVE, QA 0, FL	ATBED		1			1.00	EA	P	40	.000000	4
•	7 ITEM	CWD992E	3 >>	TRUCK,A	UTOMOTIVE, QA 0, FL	ATBED		혢			1.00	EA	P	45	.000000	4
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Slide notes

Slide 195 - Demo

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•	2 ITEM	CWD988	N >>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		 []		1.00	EA	2	25	5.000000	2
•	3 ITEM	CWD989I	>>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		詞		1.00	EA	₽	30	0.000000	3
•	4 ITEM	CWD990F	>>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		詞		1.00	EA	2	35	5.000000	3
•	5 ITEM	CWD9910	D >>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		a		1.00	EA	2	40	0.000000	4
•	7 ITEM	CWD9928	B >>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		詞		1.00	EA	2	45	5.000000	4
•	8 ITEM	CWD9933	X >>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		詞		1.00	EA	2	50	0.000000	5
•	10 ITEM	CWD994	V >>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		詞		1.00	EA	۵	55	5.000000	5
•	11 ITEM	CWD995	R >>	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		鍧		1.00	EA	٩	60	0.000000	6
•	12 ITEM	CWD9966	P ≫	TRUCK,A	UTOMOTIVE, QA 0, F	LATBED		鍧		1.00	EA	P	70	0.000000	7
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Slide notes

Slide 196 - Demo

8	Purchase C	Contracts - De	efault	Site : SC		BM	9 XAA4411I - Pro	<u>B</u> ulleti cess (ns: (0)	<u>ім R</u> еро	rts 🕉	Start	: <u>C</u> enter	^A Profile	<mark>≭</mark> <u>S</u> ign Out ? <u>H</u> e	lp 📰	N.
		✓ Find:			n 🛱 🔻 Select	Action	[•	•		2	3	N	Work	flow			
-	1 ITEM	CWD	987Q	>>	TRUCK,AUTOM	DTIVE, QA 0, FL	ATBED		1		-	1.00	EA	2	22.00000	10 :	2.
	2 ITEM	CWD	988N	>>	TRUCK,AUTOMO	т						1.00	EA	P	25.0000	00	2 ^
	3 ITEM	CWD	989L	>>	TRUCK,AUTOMO	After f	the recor	d is	saved and			1.00	EA	P	30.0000	00	3
•	4 ITEM	CWD	990F	>>	TRUCK,AUTOMO	subm	itted, Mai	xim	o displays t	he		1.00	EA	P	35.00000	00	3
	5 ITEM	CWD	991D	>>	TRUCK,AUTOMO	first li	ne item ir	the	e contract.			1.00	EA	P	40.0000	00	4
•	7 ITEM	CWD	992B	>>	TRUCK,AUTOMO	т						1.00	EA	٩	45.00000	00	4
•	8 ITEM	CWD	993X	>>	TRUCK,AUTOMO	DTIVE, QA 0, FL	ATBED		揈			1.00	EA	٩	50.0000	00	5
	10 ITEM	CWD	994V	>>	TRUCK,AUTOMO	DTIVE, QA 0, FL	ATBED		鍧			1.00	EA	٩	55.0000	00	5
•	11 ITEM	CWD	995R	>>	TRUCK,AUTOMO							1.00	EA	٩	60.0000	00	6
	12 ITEM	CWD	996P	>>	TRUCK,AUTOMO	This co	oncludes	the	demonstra	tion.		1.00	EA	٩	65.0000	00	6
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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 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.