KOENIG SOLUTIONS · COURSE OUTLINE

Maximo Application Suite - Manage: Purchasing and Contracts

1 Day	12	54	MAX4325G
DURATION	MODULES	TOPICS	COURSE CODE

COURSE OVERVIEW

This course provides students with an understanding of how purchasing and contracts are managed in MAS Manage including the overall Procurement process and lifecycle, creation of Purchase Orders, Purchase Requests, Invoices, RFQs and contracts. Students will learn about Purchasing and Contracts Applications that enable items to be ordered from vendors, and Purchase Order creation and Invoice Reversal. There is also hands-on lab exercises using a Red Hat OpenShift MAS Manage environment.

WHO THIS COURSE IS FOR

- Consultants, System Administrators, Support, Sales, and Users

LEARNING OBJECTIVES

What You Will Learn

- Describe the Purchasing and Contracts capabilities in Maximo Manage
- Create Company Master and Company records
- Set up the Purchasing options and configuration
- Create Contracts in Maximo Manage
- Create Purchase Requisitions and Purchase Orders
- Describe the Purchasing process and applications
- Create Invoices
- Perform the Purchasing and receiving process

COURSE SYLLABUS

12 Modules, 54 Topics

MODULE 1

01

Introduction to Purchasing

TOPICS

- Course Objectives
- Purchasing Process Overview
- Purchasing Lifecycle
- Company records
- PR and PO Status
- PR and PO Lines
- Contract Overview

MODULE 2

02

Contracts

TOPICS

- Master Contracts
- Purchase Contracts
- Price agreements
- Lease Rental Contracts
- Warranty Contracts
- Labor Contracts

03

Demonstration: Contracts

TOPICS

- Demonstration: Contracts

04

Student Exercises: Lab 1 Contracts

TOPICS

- Student Exercises: Lab 1 Contracts

MODULE 3

05

Requisitioning

TOPICS

- Purchasing Process
- Desktop Requisitions
- Purchase Requisitions
- PR Types
- PR Status
- Purchase Orders
- PO Status
- Prorating Services
- Request for Quotations

06

Student Exercises: Labs 2 and 3 Requisitioning and Purchase Orders

TOPICS

- Student Exercises: Labs 2 and 3 Requisitioning and Purchase Orders

MODULE 4

07

Receiving

TOPICS

- Purchasing Process
- Purchasing Lifecycle
- Receiving Materials and Services
- Receipt Types
- Line Status
- Returning Items
- Shipments
- Shipment Process

08

Student Exercises: Lab 4 Receiving

TOPICS

- Student Exercises: Lab 4 Receiving

MODULE 5

09

Invoicing

TOPICS

- Purchasing Process
- Invoicing Overview
- Invoice Lines
- Invoice Types
- Invoice Status
- Invoice Matching
- Invoice Variance
- Invoice Reversal
- Staged Invoice Reversal
- Centralized Invoicing
- Automatic Processing of Service Receipts
- Invoice Transaction

MODULE 6

10

Purchasing Options

TOPICS

- Purchase Options Overview
- PO Options
- Contract Options
- Tax Options
- PO Labor Options
- Invoice Options

11

Demonstration: Purchasing Process

TOPICS

- Demonstration: Purchasing Process

12

Student Exercises: Lab 5 - Invoicing

TOPICS

- Student Exercises: Lab 5 - Invoicing

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

- Classroom Training
- Live Online Classes (ILO)
- Fly-Me-A-Trainer (FMAT)
- Flexi (Self-Paced)
- 1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com | **info@koenig-solutions.com**