

Training Syllabus

Purchasing for Maximo v. 4.1.1

This is a one-day class that covers the procurement (materials and services) cycle as it is managed by Maximo. Purchase requisitions, requests for quotes, purchase orders, purchase agreements, material and service receipts are all discussed and practiced with scenarios. Intensive use of hands-on exercises using a fully populated Maximo installation will provide the student with practical experience.

- A. Overview and expected outcomes
- B. Maximo basics (using Companies)
 - 1. How to log in, screen layout and access to Help
 - 2. Query basics
- C. Purchasing business processes
 - 1. Relationships with maintenance and the parts warehouse
 - 2. Material types, stock vs. non-stock (demand)
 - 3. Inventory reordering process (stocking levels, reordering point, order quantities)
- D. Purchase and service requisitions
- E. Request for quote
- F. Creating and using agreements in Maximo
 - 1. Blanket orders
 - 2. Price agreements
- G. Purchase orders
- H. Invoice matching

