Multi-Buyer Purchase Requisitions at IPSC

Contents

Overview

The purpose of this document is to describe and lay out the specific steps for retrieving and processing requests and orders for multi-buyer purchases through Maximo at IPSC.

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  - o **Create Request for Quotation from Purchase Requisition**

Assumptions and Data Requirements

These process depend on the following assumptions and data requirements:

- Users add lines to Desktop Requisitions and select either an Item or Standard Service from the Item Catalog. Maximo would use the Commodity Code to Buyer mapping to automatically associate a Buyer to the line. If the user enters a *generic* Material or Service line, the system would require the user to select a value for the Buyer field (from a list of acceptable values).
- The Appropriate Buyer for each Commodity Code needs to be loaded in Maximo and IPSC needs to ensure the Commodity Code/Buyer relationship is maintained.
- If generic items or services are requested, the user must select the appropriate buyer from the value list.
- Buyers will process workflow when done with a record to remove the record from their Start Center Assignment portlet.
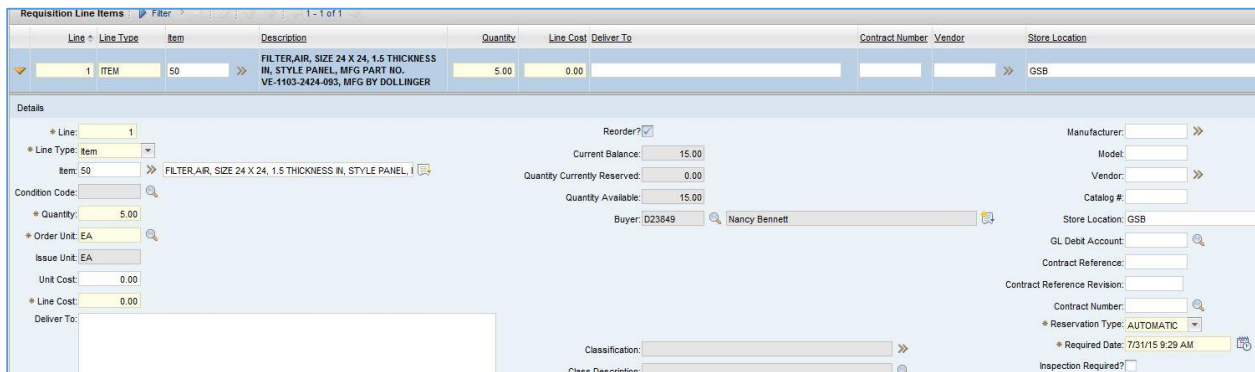
Requesting Items/Services through Desktop Requisitions

1. Go To Desktop Requisitions/Create Requisition.
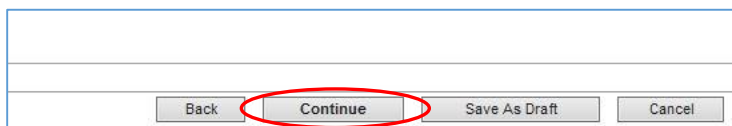2. Enter all required information


3. Click on New Row or Add Line Item.
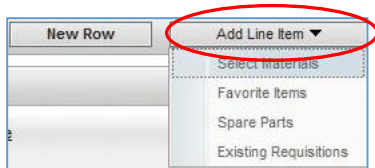
4. Enter all applicable and required information for each row.

5. Add New Rows or Line Items as required.
6. When done adding rows, click on "Continue".
    a. Option: Click on "Save as Draft" if request is to be submitted at a later time.
    b. Option: Click on "Back" if any information on previous screen needs modification.


7. After reviewing, submit the request.
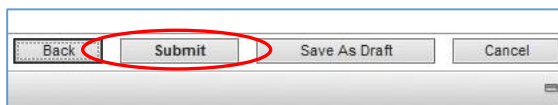
8. Create a new Requisition or exit the application.

Create Requisition through Work Order Material Plan

(Assumes Planned Material)

1. Go to Work Order Tracking (Nuclear).
2. Filter records for desired Work Order.
3. Select the Plans Tab.
4. Select the Materials Tab of the Plans Tab.
5. Click on "New Row" and select Item, Material or Service related to the Work Order's plan.
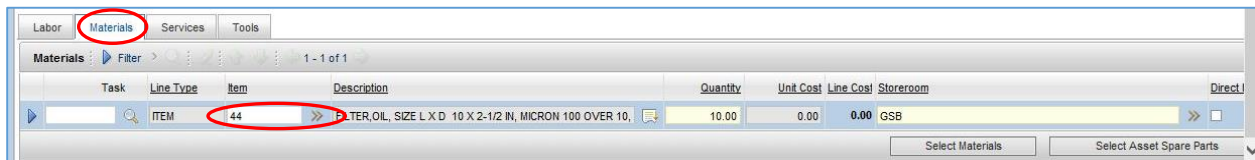
6. Repeat Step 5 as needed.
7. Save Record and route Work Flow as required or change Work Order status to Approved (if applicable). Once approved, the planned material Purchase Request will be created and routed to applicable buyer(s).

Processing Multi-Buyer Purchase Requisitions

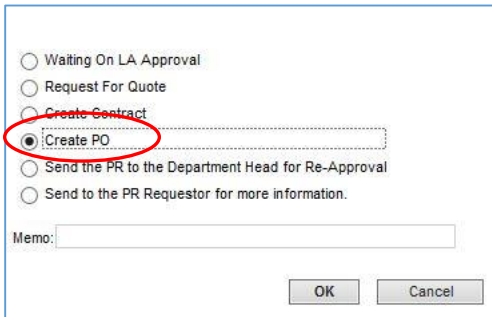## Purchase Requisition to Purchase Order

1. Log in to Maximo (or return to Maximo Start Center).
2. View "Purchase Requisitions Awaiting my Approval" portlet.
3. Sort or filter the Purchase Requisitions Awaiting my Approval portlet list if necessary and click on the PR number to open the record.
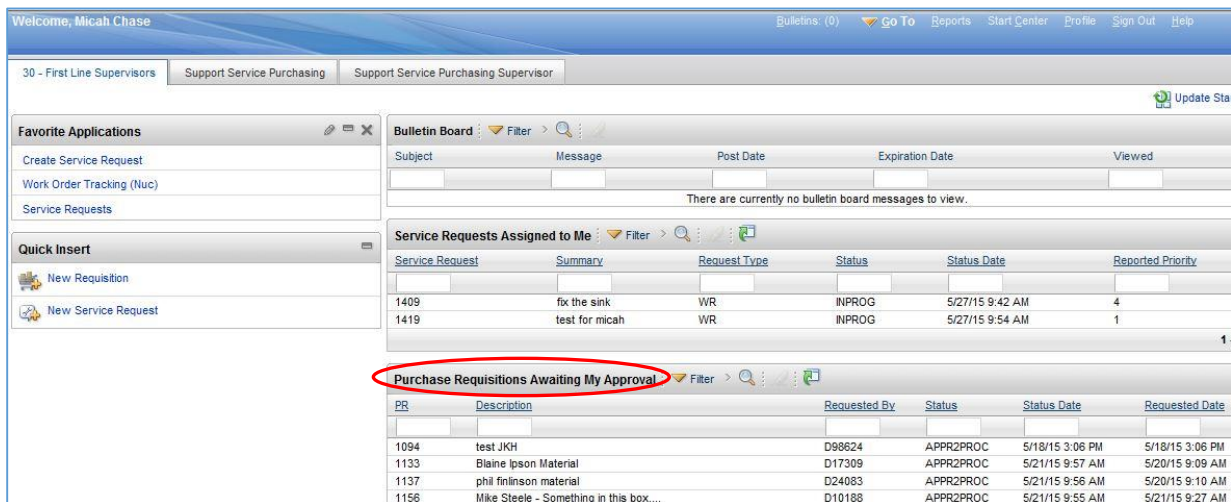

4. View the PR Lines list and filter if necessary, for the PR Lines that are yours (as the Buyer).
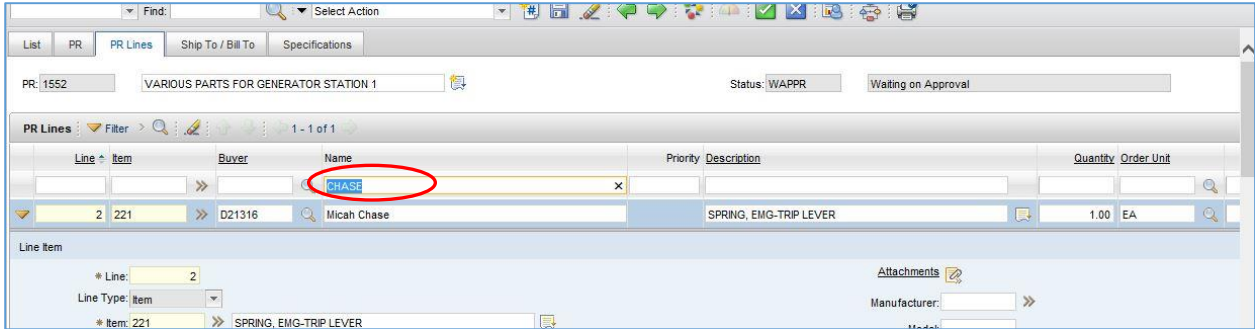
5. With the list filtered to contain only the PR Lines for the Purchase Order (PO), Route Workflow using the "Route Workflow" Button

6. From the Workflow menu select "Create PO" option.

7. Change the description if necessary and Click "Autonumber" button on the Create PO window. Note the PO number if you wish to access the record immediately through the PO application.
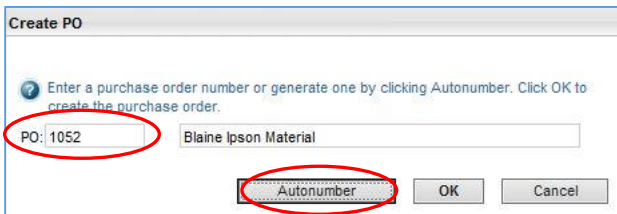
8. The PR remains available to the other Buyers until each routes workflow for PR closure via **any** of the PR workflow actions (below).

Purchase Requisition to Request for Quotation

1. Log in to Maximo (or return to Maximo Start Center).
2. View "Purchase Requisitions Awaiting my Approval" portlet.
3. Sort or filter the Purchase Requisitions Awaiting my Approval portlet list if necessary and click on the PR number to open the record.

4. View the PR Lines and filter as necessary so the list contains only the PR Lines for the Purchase Order (PO), Route Workflow using the "Route Workflow" Button

5. From the Workflow menu select "Request for Quote" option.

6. The PR Lines have been automatically added to the list of available PR Lines for an RFQ.
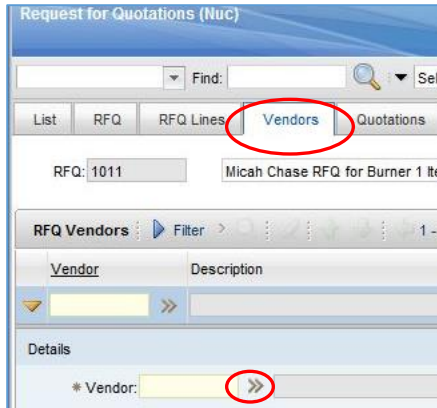7. Go to the Request for Quotations Application in Purchasing
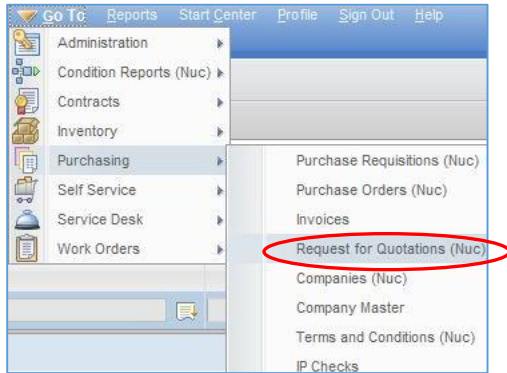
8. Give a brief description of the RFQ record, enter a value for the Buyer field and any optional fields as applicable.
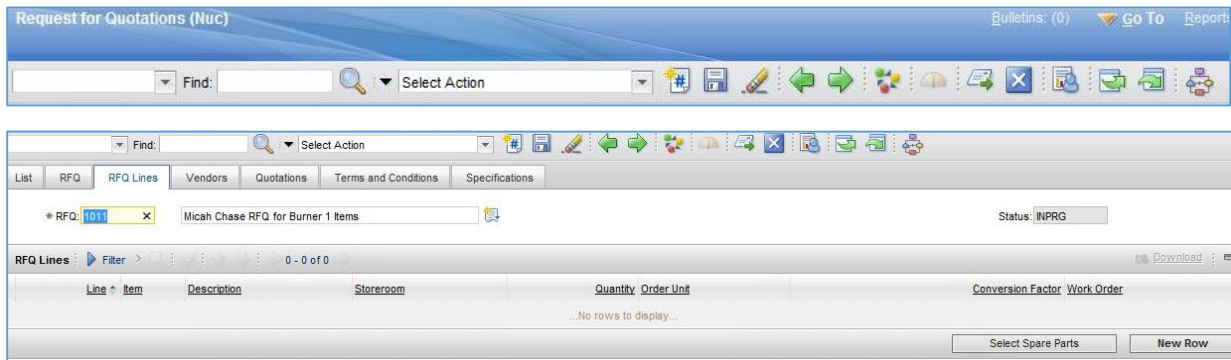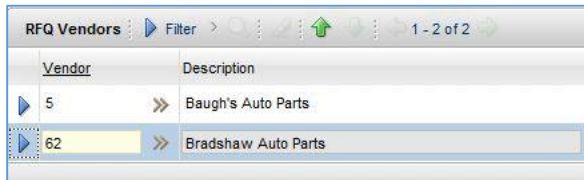

9. Use Select Action menu to select "Copy PR Line Items to RFQ", use checkbox to select desired PR Lines and click OK.
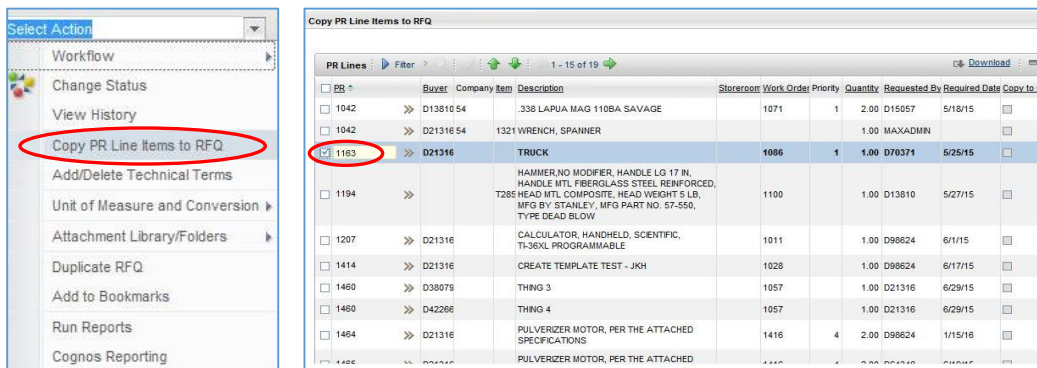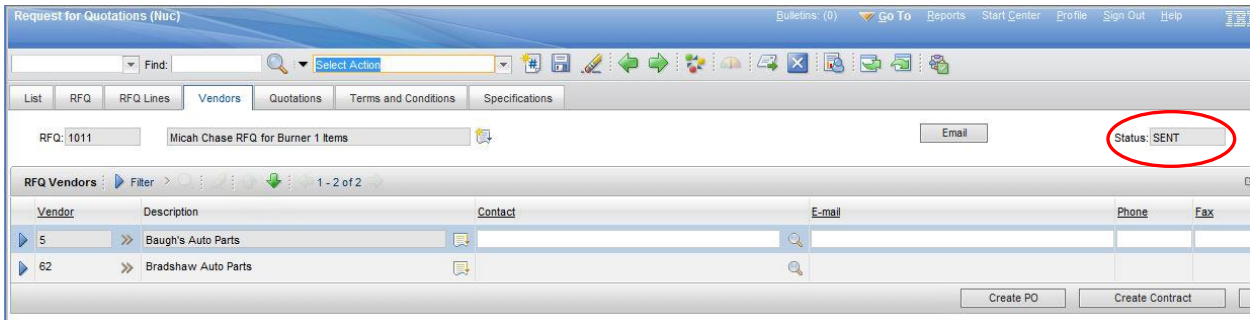

10. Use the Vendor Tab of the RFQ to select a value for the Vendor Field.

11. Insert New Row and select as many vendors as necessary for the RFQ. Route Workflow for the RFQ using the Route Workflow button.
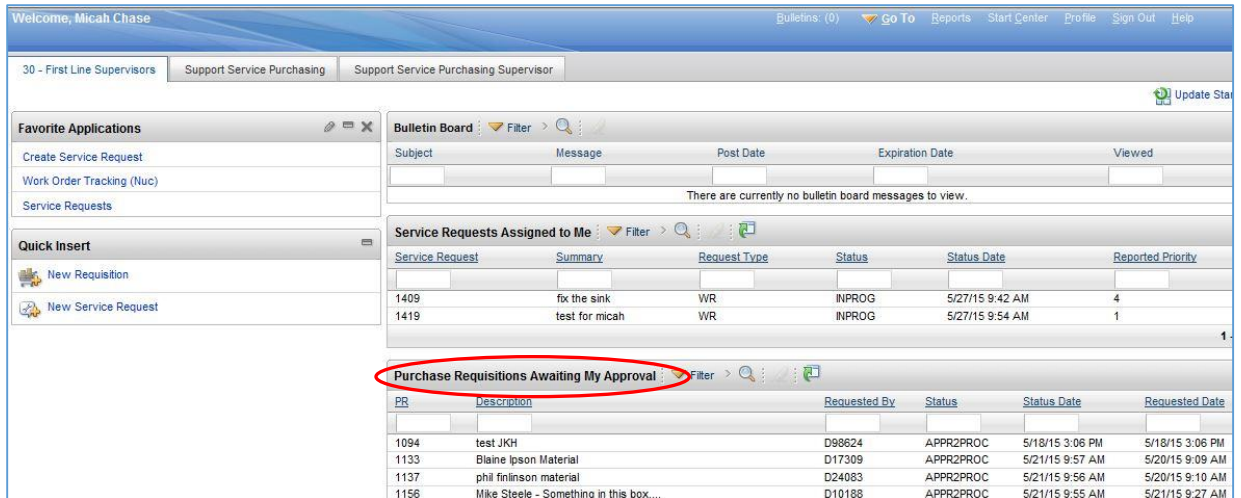

12. Route Workflow for the RFQ record using the Route Workflow button


Purchase Requisition to Contract

1. Log in to Maximo (or return to Maximo Start Center).
2. View "Purchase Requisitions Awaiting my Approval" portlet.
3. Sort or filter the Purchase Requisitions Awaiting my Approval portlet list if necessary and click on the PR number to open the record.
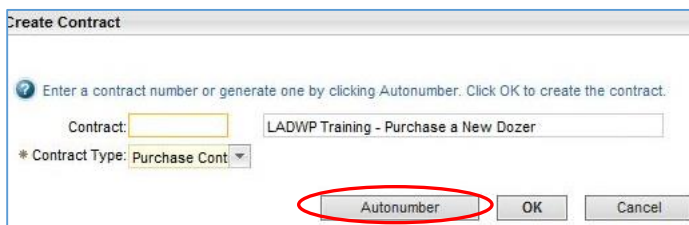
4. Open the PR record that you want to create a Contract from.
5. Filter the PR Lines to contain only the lines that need to be part of the Contract
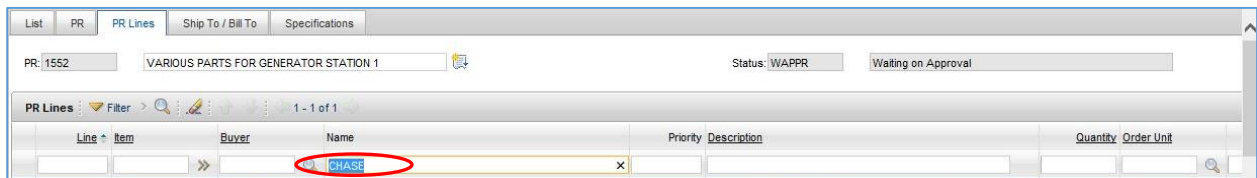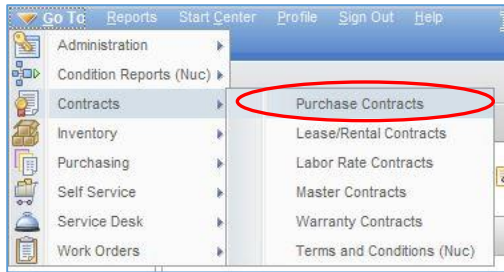

6. With the PR Lines filtered as needed, click on the Route Workflow Button and select "Create Contract" from the Input menu.
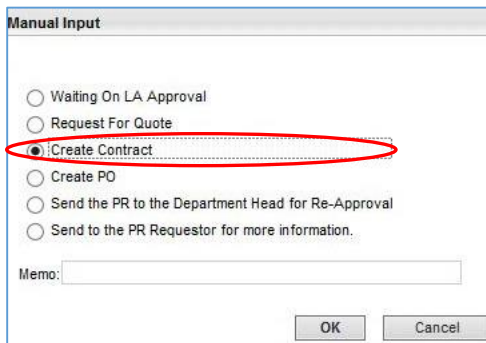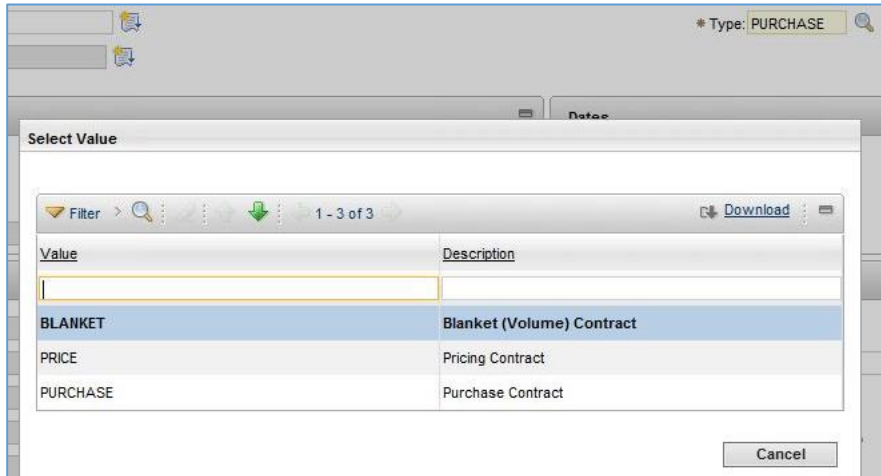

7. Choose Auto Number or manually identify your Contract as procedures dictate.
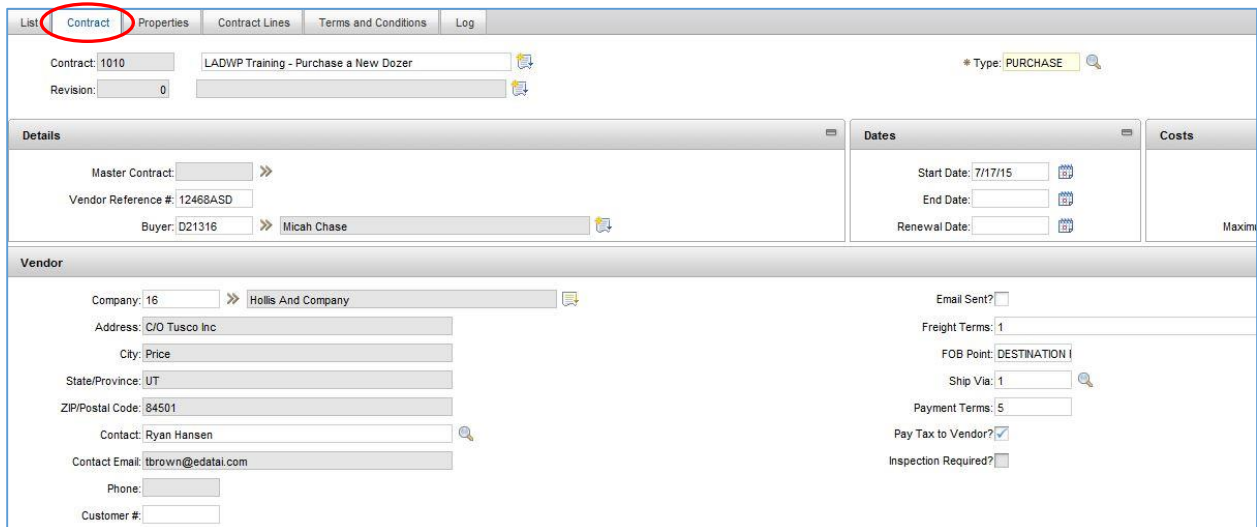

8. Go to the Purchase Contract Application in Contracts

9. Open the Purchase Contract Record and enter Select type of contract.

10. Enter/Select all applicable information on the Contract Tab.

11. On the Properties Tab select applicable contract properties.

12. On the Contract Lines Tab, view and edit lines from the PR as needed.

13. On the Terms and Conditions tab select applicable terms and conditions from value list.

14. Review Draft Purchase Contract and edit as needed
15. Change Purchase Contract Status as applicable