

# IBM Maximo Asset Management V7.1

## Creating and using a request for quotation



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This is a training module for Maximo® Asset Management V7.1. In this module, you learn to create, update, and use a request for quotation within the Maximo user interface.

## Objectives

When you complete this module, you can perform these tasks:

- Create a purchase request
- Create a request for quotation
- Award a relevant vendor for a request for quotation
- Create a relevant purchase order
- Close out a request for quotation

When you complete this module, you can create purchase requests, requests for quotations, and relevant purchase orders. After completing this training, you can also close out requests for quotations and award request for quotations to relevant vendors.

## About request for quotations

- What is an RFQ used for?
- What is an RFQ?
- For what type of conditions can you use an RFQ?
- How does a RFQ work?

Use the Request for Quotation's application to create and manage request for quotations (RFQ) for managed items. Based on the quotations, you can assess the vendor who best meets your needs.

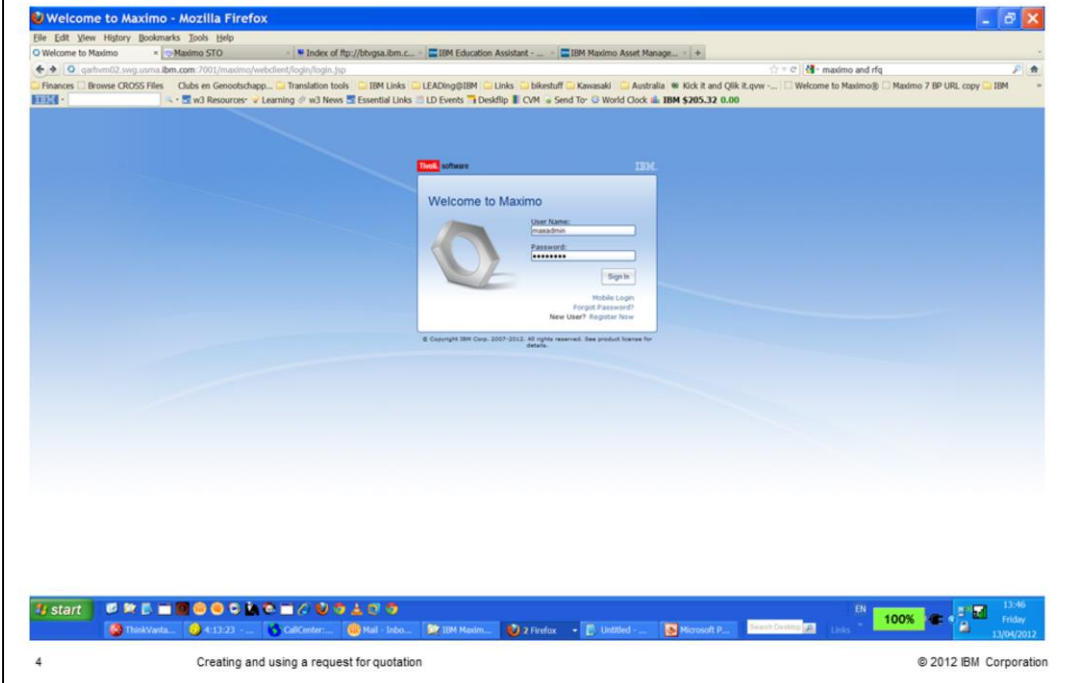
An RFQ is a request that you send out to one or more potential vendors. To list a vendor on the Request for Quotation's application, the vendor must have a record in the Companies application. In the Request for Quotation's application, you can specify line items, required delivery dates, and other conditions that you want the vendor to meet for the delivery of an item or a service.

You can create a RFQ for any of these conditions:

- The stock count of an item drops below a certain level, and you must place another bulk order.
- A requisition is received for an item or for a service that requires a quotation each time, because of item price or other requirements.
- Someone at your site requests a quote for an item or for a service. It can be for a stocked item or for a non-stocked item, such as a special order.
- You need to do commodity bulk buying for a certain period of time. This is typically for many items with common commodity codes. The quotation might not be copied to a purchase order immediately, but the pricing is set.

\*When you receive the quotations from the vendors, you insert them into the Request for Quotation's record one line at a time. At the end of the process, you review the quotations and award one quotation for each line. The quotations are then converted to one or more purchase orders or contracts, depending on the procurement flow within your organization. To clarify this further, this module shows you a step-by-step scenario example.

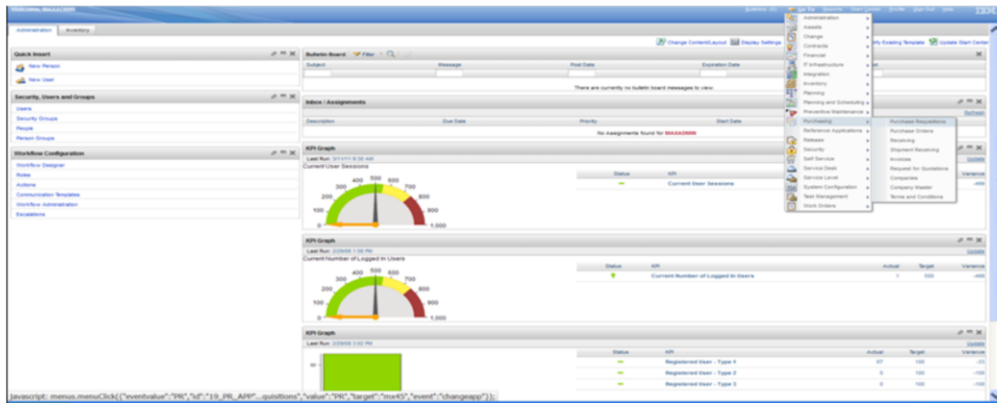
## Logging in to Maximo



To start, log into Maximo Base Services with a username and password. Make sure this user has access to the Purchasing module and its various applications.

## Going to the purchase requisitions application

**Go To > Purchasing > Purchase Requisitions**



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Login to the **Purchase Requisitions** application by clicking **Go To** on the top right corner. Select the **Purchasing** module and bring up the **Purchase Requisitions** application.

## Creating a new purchase request

Newly created purchase request with WAPPR status

The screenshot displays the IBM procurement system interface. At the top, the status is 'WAPPR' (Waiting for Approval), which is circled in red. The interface is divided into several sections:

- Details:** Includes fields for 'Requested By' (SALASOBN), 'Requested Date' (11/15/12 8:55 AM), and 'Contract Number'.
- Vendor:** Lists vendor information such as 'Company' (SALASOBN), 'Address' (3000 N. WASHINGTON AVE), 'City' (CHICAGO), 'State/Province' (IL), 'ZIP/Postal Code' (60644), 'Country' (USA), 'Customer #', and 'Phone'.
- Summary:** Shows 'Status Date' (11/15/12 8:55 AM), 'Requested Date' (11/15/12 8:55 AM), and 'Requested Date'.
- Financials:** Displays 'Problem Total' (\$0.00), 'Total Tax' (\$0.00), 'Total Cost' (\$0.00), 'Currency' (USD), and 'Total Base Cost' (\$0.00).

Create a new purchase request by clicking **Create new PR** at the top. Fill in the purchase request description and add some vendor details. Notice the status shows now as **WAPPR**. This means that the purchase request is Waiting for Approval.

## Adding lines for purchase request items

Adding a line for each purchase request item

The screenshot shows the 'PR Lines' tab in a procurement system. The table below represents the data shown in the interface:

Line #	Description	Quantity	Unit Cost	Line Cost
1	create a RFQ	1.00	1.00	1.00
2	create a RFQ	1.00	1.00	1.00

The 'Work Order' field in the 'Default Table Data' section is highlighted with a red circle.

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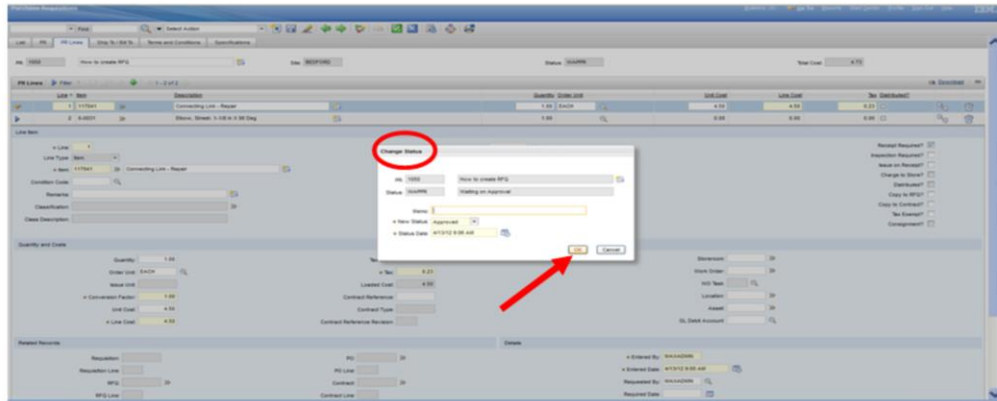
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Click the **PR Lines** tab, and, at the Purchase Request Number field add two lines. Give each PR line a description, quantity, and cost. Also, make sure each line is charged to a Work Order by placing the WO number in the **Work Order** field.

## Purchase request approval

Change the status to **Approved** and click **OK**

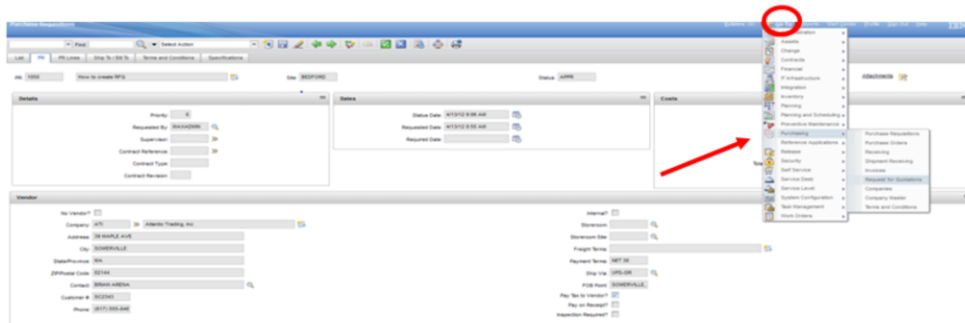


Click **Save** to save the new record. Click **Change Status** and notice that a **Change Status** window displays. Change the status to **Approved** and click **OK**.



## Opening the request for quotation application

From Purchasing, select Request for Quotation and click **Open**



Click **Go To** at the top right side. Select the **Purchasing** module and then the **Request For Quotation** application. Click **Open**.

## Create a new record

Click the RFQ tab and fill in the description fields

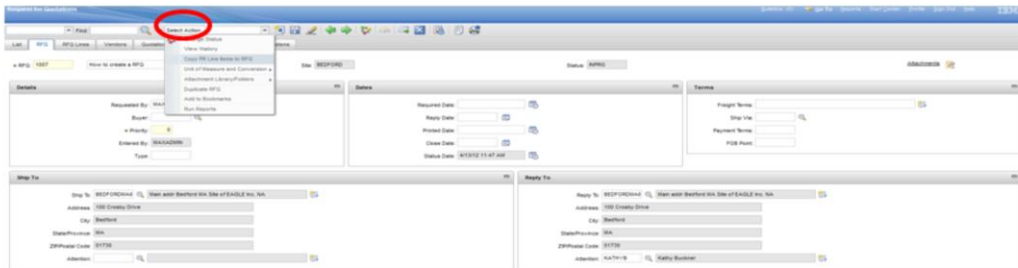
The screenshot displays the IBM RFQ (Request for Quotation) creation interface. At the top, the 'RFQ' tab is highlighted with a red circle. The interface is divided into several sections:

- Details:** Includes fields for 'Requested By', 'Requester', 'Entered By', and 'Type'.
- Status:** Includes fields for 'Requested Date', 'Ready Date', 'Printed Date', 'Closed Date', and 'Status Date'.
- Terms:** Includes fields for 'Freight Terms', 'Ship Via', 'Payment Terms', and 'FIFO Point'.
- Ship To:** Includes fields for 'Ship To', 'Address', 'City', 'State/Province', 'ZIP', and 'Attention'.
- Ship From:** Includes fields for 'Ship From', 'Address', 'City', 'State/Province', 'ZIP', and 'Attention'.

Click the **RFQ** tab at the top of the screen. Fill in the RFQ description and any other information you might require.

## Copying purchase request line items to request for quotation

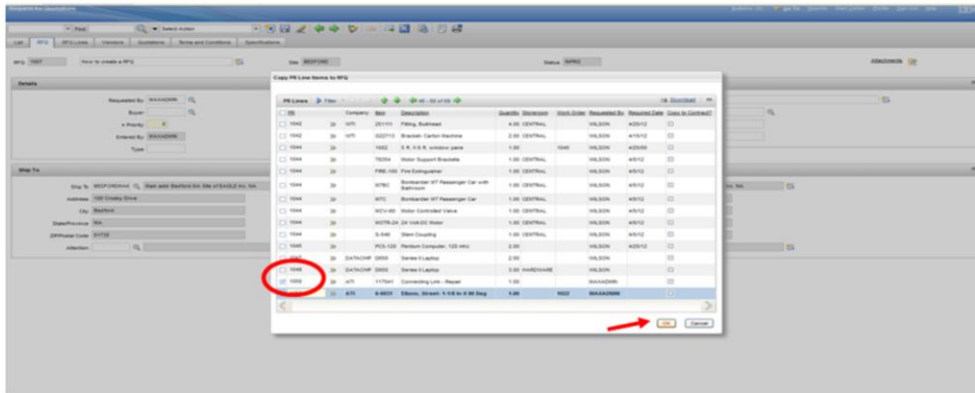
### Select Copy PR Line Items to RFQ



Click **Select Action** at the top of the application. Select **Copy PR Line Items to RFQ**.

## Add new lines to a purchase request

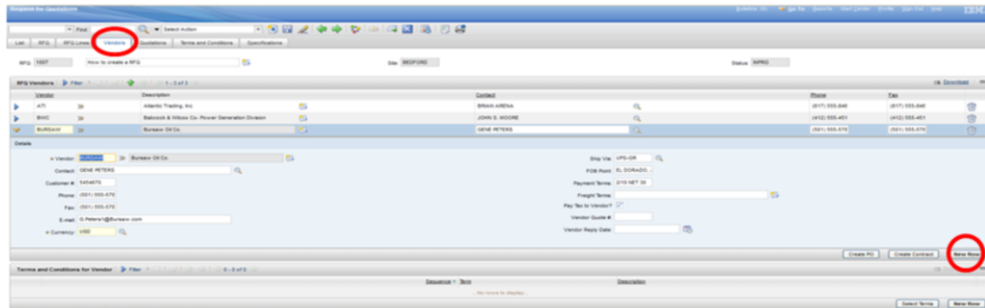
- Check the newly created line check boxes and click **OK**.



Search for the two created purchase request lines. Select both of the purchase request line check boxes and click **OK**. Finally, click **Save** at the top.

## Add vendors to a request for quotation

Add vendors to the **RFQ Vendors** section



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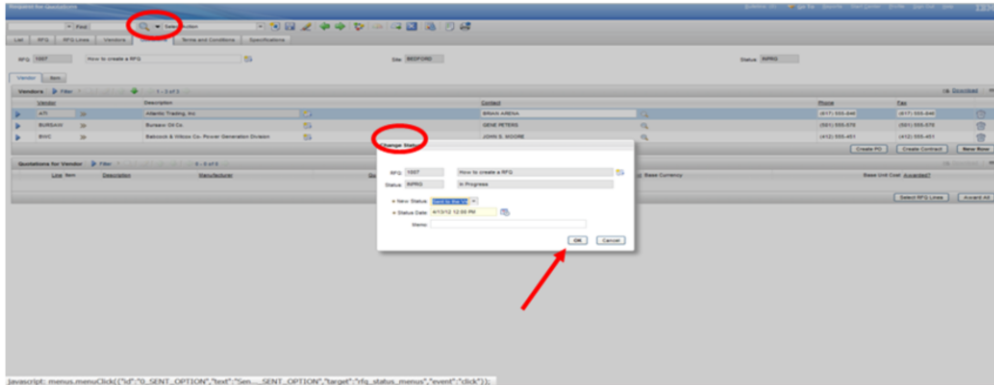
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Click the **Vendors** tab. Click **New Row** on the middle pane and add your vendors of interest one by one to the **RFQ Vendors** section. Next, click **Save**.

## Change quotation status

Change the status to **Send to Vendor** and click **OK**



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Click the **Quotations** tab. Click **Change Status** at the top of the screen. Change the status to **Send to the Vendor**. Click **OK** and then click **Save**.

## Add request for quotation lines to vendor

The screenshot displays the IBM Request for Quotations (RFQ) system interface. The main window shows a list of vendors for RFQ 1007. A 'Select RFQ Lines' dialog box is open, showing a table of RFQ lines with columns for Line Item, Description, Quantity, Order Unit, Conversion Factor, Location, and U.S. Dollar Amount. A red circle highlights the 'Select RFQ Lines' button in the dialog, and a red arrow points to the 'OK' button. The background interface includes a search bar, a list of vendors, and a 'Quotations for Vendor' section at the bottom.

Line Item	Description	Quantity	Order Unit	Conversion Factor	Location	U.S. Dollar Amount
1	Generating Lines - Repair	1.00	EACH	1.00		
2	Elect. Straps 1/18 in X 90 Deg	1.00		1.00	SHRIMP	4500.000.000

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Select one of your RFQ vendors. Click **Select RFQ Lines**. Add both of the purchase request lines created previously. Click **OK**. Repeat these steps for each RFQ vendor. Click **Save** when all the vendor entries have been completed.

## Award preferred request for quotation vendor

The screenshot shows the 'Request for Quotations' (RFQ) interface in IBM Maximo. The browser window title is 'Request for Quotations - Mozilla Firefox'. The interface includes a navigation bar, a list of RFQs, and a detailed view of a selected RFQ. The 'Awarded' checkbox is circled in red.

Vendor	Quantity	Unit	Unit Cost	Line Cost	Line Total	Quantity	Unit	Unit Cost	Line Cost	Line Total
ATN	EACH	1.00	0.00	0.00	0.00	1.00	EACH	0.00	0.00	0.00
Bondcase	EACH	1.00	0.00	0.00	0.00	1.00	EACH	0.00	0.00	0.00
SHD	EACH	1.00	0.00	0.00	0.00	1.00	EACH	0.00	0.00	0.00

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Select the line with the preferred RFQ vendor. Click **Award All**. Check that the **Awarded** option is selected. Click **Save**.



## Create a vendor purchase order for the request for quotation

The screenshot shows the SAP Request for Quotation (RFQ) interface. The 'Vendor' tab is circled in red. Below the vendor list, the details for vendor 'ATI' (Adleric Trading, Inc.) are displayed. A red arrow points to the 'Create PO' button at the bottom right of the vendor details section.

Vendor	Description	Contact	Phone	Fax
ATI	Adleric Trading, Inc	BRIAN ARENA	(817) 555-646	(817) 555-646
BURSAH	Burshaw Oil Co.	GENE PETERS	(501) 555-576	(501) 555-576
BWC	Babcock & Wilcox Co- Power Generation Division	JOHN S. MOORE	(412) 555-451	(412) 555-451

Line Item	Description	Manufacturer	Quantity	Unit of Measure	Currency	Unit Cost	Base Unit Cost
1	117041 Connecting Link - Repair	ENG MFG	1.00	EACH	USD	0.00	0.00
2	0-0031 Elbow, Steel, 1-1/8 N X 90 Deg		1.00		USD	0.00	0.00

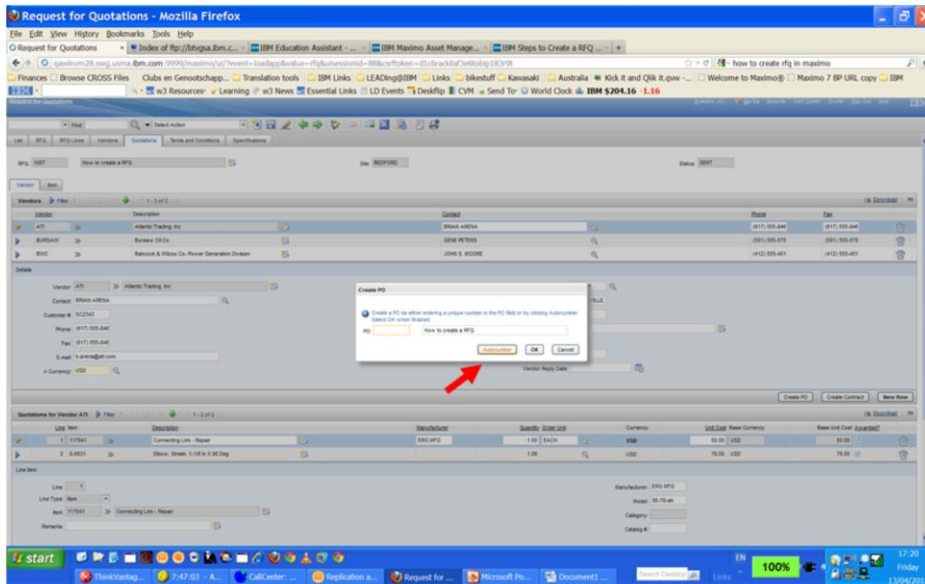
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Click **Create PO** on the **Vendor** section.

## Create an automatically numbered purchase order



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Notice that a Create PO window displays. Click **Autonumber**. Click **OK** and **Save**.

## Automatically closing the request for quotation

The screenshot shows the IBM Maximo 'Request for Quotations' (RFQ) interface. The status of the RFQ is 'Closed', which is circled in red. The interface displays a list of vendors, a detailed view of vendor 'ATN', and a table of quotations for 'Connecting Link - Repair'.

Line	Description	Quantity	Unit	Price	USD Cost	Base Unit Cost
1	Connecting Link - Repair	1.00	EACH	99.00	99.00	99.00
2	Blow-Down 1.00 in 3.00 Day	1.00	DAY	78.00	78.00	78.00

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Notice that the status of the RFQ automatically closes when the PO for it has been created.

## Verify that purchase order number is on request for quotation line

Purchase order number is on RFQ line.

The screenshot displays the 'Request for Quotation' (RFQ) line details in the IBM Business Partner Portal. The main table shows two RFQ lines:

Line #	Item	Description	Unit of Measure	Quantity	Unit Price	Line Total	Commodity Factor	Work Order
1	4175441	Connecting Link - Repair	EA	1.00	1.00	1.00	1.00	
2	0-00111	Black, Blank, 1/4 x 1/8 x 1/8 Dwg	EA	1.00	1.00	1.00	1.00	

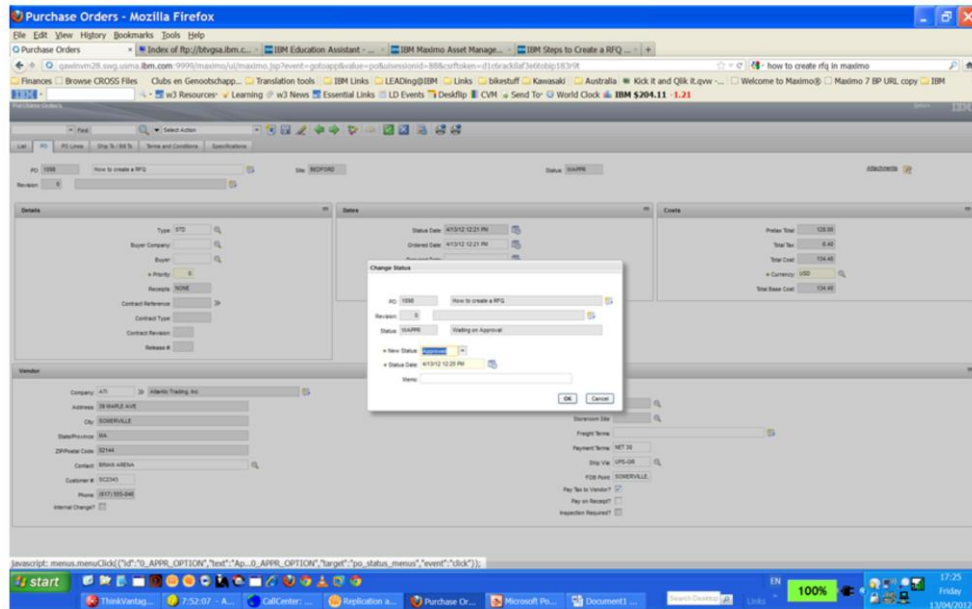
The 'Line Item' section for line 1 shows the following details:

- Line: 1
- Line Type: Item
- Item: 4175441
- Description: Connecting Link - Repair
- Quantity: 1.00
- Unit Price: 1.00
- Line Total: 1.00
- Commodity Factor: 1.00
- Condition Code: [empty]
- Manufacturer: 002 072
- Model: 00-70-00
- Category: [empty]
- Commodity Group: 0000
- Commodity Code: [empty]
- Classification: [empty]
- Class Description: [empty]
- Remarks: [empty]

The 'Change To' section includes fields for Revision, Work Order, PO Line, Location, Asset, and PO Field. The 'Request Details' section includes fields for Request, Requester Line, PO Line, Contract, Contract Code, and Contract Type. The 'Dates' section includes fields for Entered By, Entered Date, Requested By, Requested Date, Supplier, and Awarded Date.

Expand one of your RFQ lines. Note that the PO/PO line is now also recorded on the **RFQ Lines** detail in the **PO** field. Click **Save**.

## Approving purchase orders



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Click the detail button next to the **PO** field. Go to the relevant PO. Click **Change Status**. Change the status to **Approved**. Click **OK** and **Save**.

## Performing final checks

Purchase request status automatically changes to **Closed**

The screenshot displays the SAP Purchase Request (PR) details for PR 1110000000. The status is 'Closed'. The interface is divided into several sections:

- Line Item:** Shows two lines. Line 1 is 'Connecting Link - Repair' with a quantity of 1.00. Line 2 is 'EBlock, Straps 1-100 in 0.00 Day' with a quantity of 1.00.
- Line Item Details:** Contains fields for Line Type (Standard), Line Type Description (Connecting Link - Repair), Material (2902-0012), Category, and various checkboxes for requirements like 'Inspection Required' and 'When in Request'.
- Quantity and Costs:** Displays costs for the selected line item, including Net Cost (760), Gross Cost (927.40), and Unit Cost (927.40).
- Related Records:** Lists other documents related to this PR, such as RFQ 1110000000, PO 1110000000, and Vendor Order 1110000000.

Perform a final check on the PR. Notice that the PR status has now also automatically changed to Closed. Also notice that both of the PR lines are referenced not only on the RFQ, but also on the actual PO.

## Summary

Now that you have completed this unit, you can perform these tasks:

- Create a purchase request
- Create a request for quotation
- Award a relevant vendor for a request for quotation
- Create a relevant purchase order
- Close out a request for quotation

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