

Willie Hicks

Project Manager, Infrastructure Assets



MAXIMO PURCHASE CONTRACTS AT MASSPORT



Objective

The objective of this project was to migrate all existing purchase contracts for the Fleet Inventory Management group from their legacy Mainsaver system to Maximo allowing them to automatically associate purchases/receipts with the contracts to track spending.

Having this information in Maximo would:

1. Make purchasing easier and more efficient
2. Allow the department to proactively track their burn against contracts
3. Make verifying invoices and reporting spend against contracts to finance easier.

Add the “Market Basket” pricing agreements to the relevant contracts to further automate purchase order creation while ensuring the “Market Basket” **prices are being utilized.**





Market Basket

What is it?

The Massport Market Basket is a fixed list of frequently purchased items, their units and cost. Its use is to inform potential buyer of the products, pricing and vendors with whom Massport has contracted.

Upon re-bid Massport will use purchase history to determine if Market Basket items should be removed or new items added to the purchase agreement by tracking the frequency of items purchased by the Authority.



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Implementation Plan

Preparation of a Contract Load file to migrate legacy Contracts

Evaluation of Market Basket Items against Maximo Items to establish mapping

Preparation of a Contract Update Load file to add Market Basket Items and Pricing to appropriate Contract

Performance of a load into the Test environment

Review and approval of the loaded data in the Test environment by the stake holders

Reload to Test environment for verification

Performance of a load into the Production environment

Conducted the necessary training



Purchase Contract Module

The Maximo Inventory and Purchasing Training provided Fleet Maintenance with solid understanding of Maximo's inventory and purchasing capabilities and functions to perform day-to-day transactions in Maximo.

- Creating/managing items
- The reorder process,
- Creating Release POs
- Purchase orders,
- Receiving materials and Services
- Invoicing and Invoice verification



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Track Contract Spending

View Release Costs

Release Costs

Total Cost:
9,204.00

Amount on Order:
0.000000

Number of Uncommitted Releases:
0

Amount Received:
1,200.000000

Number of Committed Releases:
1

Amount Remaining:
8,004.000000

Uncommitted Cost:
0.000000

Invoice Variance:
0.000000

Committed Cost:
1,200.000000

Purchase Orders

[Filter](#) > 1 - 1 of 1

PO	Release #	Description	Site	Ordered Date	Status	Receipts	Total Cost
62402-0007	1	Capco Crane & Hoist Inc. - Blanket PO	LOG	3/12/19 12:28 PM	CLOSE	COMPLETE	1,200.00

OK



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Associate Labor, Material & Service Costs

List View | Work Order | Plans | **Actuals** | Activities | Measurements | Axle Configuration | Related Records | Safe

Work Order: 212690 | INSP. STICKER | Site: LOG | Status: COMP

Asset: 8356 >> 137 / 2011 Ford F550 with Garbage Compactor / 2700 / M82 | Alias: 137

Children of Work Order 212690 [Filter](#) > 0 - 0 of 0

Tasks for Work Order 212690 [Filter](#) > 0 - 0 of 0

Sequence	Task	Summary	Component	Reason for Repair	Warranty?	Qualifications	Status
There are no rows to display.							

[New Row](#)

Labor | Materials | **Services** | Tools | Repair Orders

Services [Filter](#) > 1 - 1 of 1

Task	Service	Description	Quantity	Unit Cost	Loaded Cost	Warranty?
		Mass Mobile Inspection	1.00	105.490000	105.49 N	



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Full Lifecycle Cost Analysis

Asset Management System Interface

Asset: 8356 **137 / 2011 Ford F550 with Garbage Compactor / 2700 / M82** Alias: 137 Site: LOG

Location: L003 **LOGAN, FACILITIES 2** Status: ACTIVE Attachments

Massport Location:

Details

Year: 2011

Massport Manufacturer: FORD

Model: F-550 F-550

Serial #: 1FDUF5GT8BEA37828

Type: FLEET Fleet Assets

COBie Classification:

Asset Template:

Vendor:

Life Cycle

Purchase Price: 75,000.000000

Replacement Cost: 90,000.000000

Current Value:

Installation Date: 8/29/10

Repair Limit Amount:

YTD Cost: 0.000000

Total Cost: 100,919.100000

Inventory Cost: 0.000000



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Invoice Verification

The Market Basket portal was created so that buyers could identify items that are under contract and verify pricing upon Invoicing



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Invoice Verification Process

Paint / Graco & Paint Supplies

RFP # 6215

PPG ARCHITECTUAL FINISHES - Vendor Number 22236

Contract 10/25/19 thru 10/24/22 (1- 3 years)

[10/25/22 - 10/24/23]

[10/25/23 - 10/24/24]

(need to contact vendor for price increase for Option Year 2)

0%

RFP 6215 PAINT & SUPPLIES - PPG - All their Product

Description	Manufacture	UOM	Unit Price Year 1 - 3	Option Year 1	Option Year 2
MOORGARD PASTEL BASE NOVEMBER RAIN	PPG PAINT	EA	\$16.99	\$16.99	TBD
MOORGLO DEEP BASE GRAVEL GRAY	PPG PAINT	EA	\$13.99	\$13.99	
REGAL SELECT 2122-70 SNOW WHITE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL 2126-40 SWEATSHIRT GRAY	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL 947 NAVAJO WHITE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL AMERICAN SOFFIT	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL CRUSHED ICE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL GRAVEL GRAY	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL HINT OF BLUE	PPG PAINT	EA	\$21.88	\$21.88	
REGAL SELECT EGGSHELL MATCH BRONZETONE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL OC-55 PAPER WHITE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL OLIVE FOG (8171W)	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL PAPER WHITE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL REGENCY	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL STONINGTON GRAY	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL SWEET BLUETTE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL WINTERWOOD 1486	PPG PAINT	EA	\$21.99	\$21.99	
ULTRA SPEC 500 INT SEMI GLOSS BRIGHT YELLOW	PPG PAINT	EA	\$13.99	\$13.99	
ULTRA SPEC 500 INT EGGSHELL 2009-20	PPG PAINT	EA	\$13.99	\$13.99	
ULTRA SPEC 500 INT EGGSHELL 909 ANTIQUE WHITE	PPG PAINT	EA	\$13.99	\$13.99	
ULTRA SPEC 500 INT EGGSHELL NOVEMBER RAIN	PPG PAINT	EA	\$13.99	\$13.99	
ULTRA SPEC 500 INT SEMI GLOSS 2022-30	PPG PAINT	EA	\$14.99	\$14.99	
ULTRA SPEC 500 INT SEMI GLOSS BRIGHT YELLOW	PPG PAINT	EA	\$14.99	\$14.99	
URETH ALKYD GLOSS BATTLESHIP GRAY	PPG PAINT	EA	\$29.99	\$29.99	
5 GAL LTX TRAFFIC PAINT BK	PPG PAINT	EA	\$60.00	\$60.00	
DTM ACRYLIC SEMI GLOSS BRONZETONE	PPG PAINT	GAL	\$19.99	\$19.99	
DTM LATEX LOW LUST BRONZETONE	PPG PAINT	EA	\$19.99	\$19.99	
GALLON SAFETY YELLOW ENAMEL	PPG PAINT	EA	\$22.95	\$22.95	
GALLON ACRYLIC CLEAR BASE S/G 2061-10	PPG PAINT	EA	\$12.99	\$12.99	
GALLON CABINET COAT WHITE SATIN WHITE	PPG PAINT	EA	\$12.99	\$12.99	
GALLON GLOSS BLACK IND ENAMEL	PPG PAINT	EA	\$19.99	\$19.99	
GALLON MOORGLO MEDIUM BASE NOVA SCOTIA BLUE	PPG PAINT	EA	\$13.99	\$13.99	
GALLON PRIMER FRESH START SUPERIOR	PPG PAINT	EA	\$15.99	\$15.99	
GLOSS WHITE OIL	PPG PAINT	EA	\$22.95	\$22.95	
HO291X05 ANTIQUE WHITE	PPG PAINT	EA	\$13.99	\$13.99	
IM FIRE RETARDANT WHITE	PPG PAINT	EA	\$59.99	\$59.99	
LATEX TRAFFIC PAINT RED	PPG PAINT	EA	\$9.99	\$9.99	
TOUGH SHIELD DEEP BASE	PPG PAINT	EA	\$15.99	\$15.99	
TOUGH SHIELD DEEP BASE DECK GRAY	PPG PAINT	EA	\$15.99	\$15.99	
TOUGH SHIELD FLOOR GRAY PEARL	PPG PAINT	EA	\$15.99	\$15.99	
TTP3224 YELLOW TRAFFIC MARKING	PPG PAINT	EA	\$9.99	\$9.99	

Contract data and line items were reformatted into PDF format and stored on Massport's internal portal.

Prior to submitting a PO buyers could use this data to verify approved vendors and prices

When invoiced, buyers could also use the data to verify that pricing was correct...



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Invoice Verification

This process resulted in Massport being overcharged for some contracted items with agreed upon prices

Massport's Purchasing Department was tasked with performing regular audit of invoices and to take the necessary steps to correct any deficiencies



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Move to Maximo

Director of Purchasing asked if Maximo could help with this process

A workshop held to better understand the desired output and how Maximo purchase contracts may be able to meet their need

All Market Basket contracts and line items were loaded into Massport's test environment and a review process was drafted

Once everyone was satisfied with the data conversion and process the contract data was then moved to our production instance



All Market Basket Move to Maximo

Paint / Graco & Paint Supplies Contract 10/25/19 thru 10/24/22 (1-3 years) [10/25/22 - 10/24/23] [10/25/23 - 10/24/24]
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REGAL SELECT EGGSHELL 2126-40 SWEATSHIRT GRAY	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL 547 NAVAJO WHITE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL AMERICAN SCOTT	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL CRUSHED ICE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL GRAVEL GRAY	PPG PAINT	EA	\$21.99	\$21.99	
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REGAL SELECT EGGSHELL PAPER WHITE	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL REGENCY	PPG PAINT	EA	\$21.99	\$21.99	
REGAL SELECT EGGSHELL STONINGTON GRAY	PPG PAINT	EA	\$21.99	\$21.99	
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Purchase Contracts

Find Contract

Find Navigation Item

Go To Applications

Available Queries

All Records

All Bookmarks

Common Actions

New Purchase Contract

Clear Changes

Change Status

Create Report

Application Export

Application Import

More Actions

View History

Copy PR Lines to Contract

Copy PO Lines to Contract

Create RFQ

Create Release PO

View Release Costs

View RFQ Line Items

View PR Line Items

View Invoice Lines

Authorize Sites

Contract MB10012 RFP 5007 RESULTS FOR OFFICE SUPPLIES-GA BLANCC Type: BLANKET Status: APPR Revision: 0 Total Cost: 3,247.68

Contract Lines 1 - 12 of 58

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	MB2236	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	14.08	14.08
2	ITEM	MB2237	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	18.20	18.20
3	ITEM	MB2238	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	14.64	14.64
4	ITEM	MB2239	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	14.34	14.34
5	ITEM	MB2240	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	15.14	15.14
6	ITEM	MB2241	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	44.80	44.80
7	ITEM	MB2242	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	105.52	105.52
8	ITEM	MB2243	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	15.64	15.64
9	ITEM	MB2244	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	13.80	13.80
10	ITEM	MB2245	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	13.98	13.98
11	ITEM	MB2246	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	15.30	15.30
12	ITEM	MB2247	OFFICE SUPPLIES-GA BLANCO-TONER-T1	1.00	EACH	49.14	49.14

Payment Schedule Vendor Items New Row

Gives Massport's Purchasing Department the ability to quickly and easily perform regular audit of invoices. If they find that over charging has occurred they can do a more exhaustive vendor review and impose the necessary corrective action



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Purchase Contracts

The screenshot shows the Massport Start Center web application. The browser address bar displays `maxtest.massport.com/maximo/ua/login?appenvauth=true`. The user is logged in as Willie Hicks. The left navigation pane lists various applications, with 'Data Import (Tr)' highlighted. A 'Quick Insert' panel is visible, showing options like 'New Asset', 'New Item', 'New Location', 'New PM', 'New Person', and 'New Work Order'. A 'Favorite Applications' panel lists items such as 'Telemetrics Codes (Tr)', 'Telemetrics Data Import (Tr)', 'Fuel Transactions Import (Tr)', 'Migration Groups', 'Migration Manager', 'Domains', 'People', 'Classifications (Tr)', 'Assets (Tr)', 'Inventory (Tr)', 'Inventory Usage (Tr)', 'Item Master (Tr)', 'Job Plans (Tr)', 'Locations (Tr)', 'Labor Reporting (Tr)', 'Organizations (Tr)', 'Preventive Maintenance (Tr)', 'Work Order Tracking (Tr)', and 'Users'. The main content area includes a 'Bulletin Board' with no messages and a 'Result Set' table.

User Name	User
whicks	7141

1 - 1 of 1



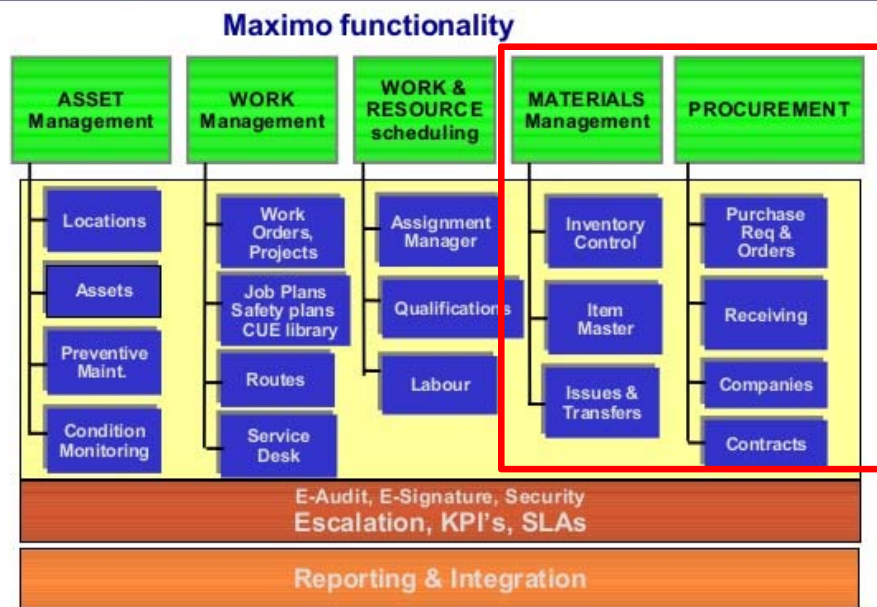
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Purchase Contracts

Next Steps

Introducing Maximo



Increase Maximo material management and procurement visibility and usage within other Authority sites

Integration with PeopleSoft and the implementation of electronic workflow



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