

NEMUG Presentation: October 20, 2002

Oglethorpe Power Corporation E-Sourcing Initiative

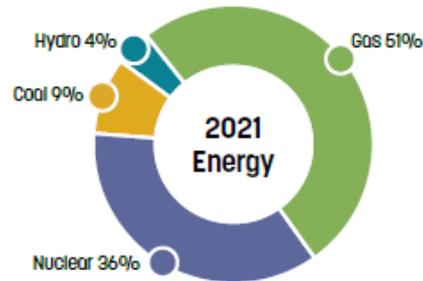
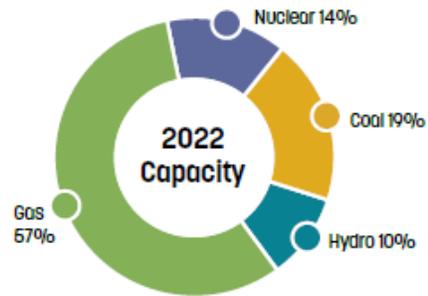
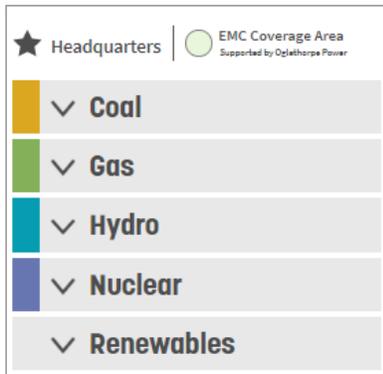


Agenda

- About Company
- Maximo Environment
- E-Sourcing Assessment
- E-Sourcing Implementation
- Our Experience
- Q&A

Oglethorpe Power Corporation

GENERATING FACILITIES



- ▶ Oglethorpe Power is one of the nation's largest power supply cooperatives with approximately \$15 billion in assets serving 38 Electric Membership Corporations which, collectively, provide electricity to approximately 4.4 million Georgia residents.
- ▶ Its diverse energy portfolio includes natural gas, nuclear, hydroelectric and coal generating plants with a combined capacity of more than 8,300 megawatts. Oglethorpe Power was established in 1974 and is owned by its 38 Member Systems.
- ▶ Its headquarters are in Tucker, Georgia, an Atlanta suburb.
- ▶ Family of Companies includes Georgia Transmission Corporation (GTC) and Georgia System Operations Corporation (GSOC)

Oglethorpe Power Corporation

Maximo: Single Organization - Multi-Site (10) - ~275 Users



OPC Headquarters



Thomas A. Smith Energy Facility



Effingham Energy Facility



Chattahoochee Energy Facility



Rocky Mountain Hydroelectric Plant



Doyle Energy Facility



Hawk Road Energy Facility



Hartwell Energy Facility



Sewell Creek Energy Facility



Smarr Energy Facility



Talbot Energy Facility

Business Application Usage On Maximo 7.6.1.2

* Workflow-Enabled

**Add-On Product

*** In Progress

MODULE	APPLICATION
Administration	Calendars, Resources, Classifications, Interloc Solutions Informer** , Interloc Solutions Mailer**
Assets	Assets, Locations, Failure Codes, TK Pro**
Contracts	Terms and Conditions, Master Contracts* , Purchase Contracts*
Financial	Chart of Accounts
Inventory	Inventory, Inventory Usage, Bin Master** , Shipment Receiving, Condition Codes, Item Master* , Service Items, Storerooms
Planning	Job Plans* , Routes, IBM Scheduler** , IBM Calibration**
Preventive Maintenance	Preventive Maintenance
Purchasing	Company Master* , Companies* , Insurance** , ISN** , Purchase Requisitions* , Request for Quotations* , Purchase Orders* , Receiving* , Invoices* , Visa and Expense Reporting** , Knowledge Lake Bot**
Resources	Crafts, Labor, People, Person Groups
Self Service/Service Desk	Desktop Requisition, Plant Access* , Maximo Service Requests* , Facility Service Requests*
HSE Module	Safety Events* , Environmental Incident Reporting* , Capital Scoping Projects* , MOC***
Work Orders	Labor Reporting, Quick Reporting* , Work Order Tracking* , Work Request*
E-Mail Listeners	Receipts, Contracts, work orders, service requests

Not our first attempt...

- ▶ In 2012, went to market searching for E-Sourcing Tool
 - RFP
 - Analysis
 - Recommendation
- ▶ Market Changed
- ▶ Put Award on hold
- ▶ 9 years later.....

Why did OPC need an E-Sourcing Tool?

OPC NEEDED...

- A tool that was more than getting a faxed/emailed quote
- A solution that provided integration and transparency with Maximo
- A secure bidding tool for both open and sealed bids
- A tool that could handle single quotes and LARGE bids
- A simple tool to use
- A tool that provided audit capabilities
- A tool that was ZERO cost to our vendors

RFP for E-Sourcing Tool

- ▶ Formed E-Sourcing team (IT, Maximo BSA, Supply Chain)
- ▶ Utilized some of previous RFP requirements
- ▶ Identified vendors
- ▶ Prepared Documents
 - Submit to select group of vendors
 - Invite vendors to conduct product demos, Q&A session(s)
 - Interview client reference checks
- ▶ Compiled advantages/disadvantages
- ▶ Produced cost estimate
- ▶ Recommended vendor
- ▶ Obtain approval from stakeholders & awarded

Why P2Insight's Order Hub?

- Solution configurable to OPC's needs.
 - Work Flow
 - PR Re-approvals after bids
- Solution utilizes the functionality in Maximo
- Allows for designation of sealed bids
- Provides varied bid analysis
- Buyers and contract agents never leave Maximo to create, to analyze and award a bid event.
- Allows for approval of bid event prior to issuing contract
- The solution provides a hub that the vendors use to create and submit their bids without accessing Maximo (so no licensing issues)
- Cost
 - Zero Cost to Vendors/Contractors
 - Lowest Owning Cost to OPC

Implementation Schedule

Activity	2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2
Bids	X							
Demo's		X						
Recommendation		X						
Contract Negotiations			X					
Award			X					
Design Meetings				X				
Phase 1 & Phase 2 Testing					X	X		
Invite Vendors to Subscribe							X	
Conducted Vendor Training							X	
Go-Live							X	
Follow-up on issues								X

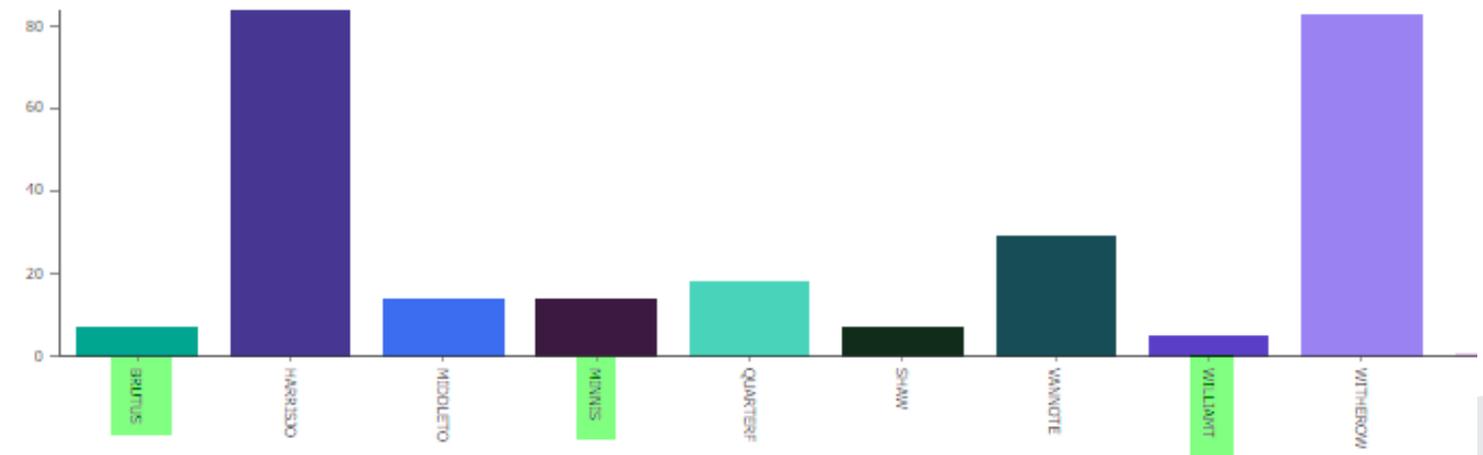
Current Status (as of Sept 15th)

- 2000 Active Vendors
- ~600 flagged as potential order hub vendors
- 246 Invited to Order Hub
- 165 Active Registered Vendors
 - 112 of Registered: \$37M spent in 2021
- 268 Events since Go-Live
 - Contracts
 - 15 Awarded (\$6.6M)
 - 12 In Progress (\$9.3M)
 - Non-Contract
 - 231 Awarded (\$377K)
 - 10 In progress (\$50K)

RFQ History Filter > 🔍 🗑️ ⬇️ 📄

Chart Type: [BAR](#)

2022 Order Hub RFQ's - 2022 Order Hub RFQ's (By Buyer)



RFQ Inventory Items & Direct Issue Materials

Sample RFQ: Inventory Items/Materials

Purchase Requisitions

Find PR [Search Icon] [Filter Icon] [Refresh Icon] [Back Icon] [Forward Icon] [Print Icon] [Export Icon] [Import Icon] [Help Icon] [Share Icon] [New Icon] [Close Icon]

List PR PR Lines Ship To / Bill To Terms and Conditions Log Specifications

PR: PR146856 Generated by reorder 12/17/21 5:40 AM

WF Last Memo Details: [Calendar Icon]

Site: CHATT

Status: APPR

Attachments [Paper Icon]

Notes: [Text Area]

Details	Dates	Costs	Bid/Quote
Priority: 1	Status Date: 1/27/22 3:46 PM	Pretax Total: 700.0000	Bid and/or Quote:
Requested By: MAXCH	Requested Date: 12/17/21 5:40 AM	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
Requested For:	Required Date: 12/17/21 5:40 AM	Total Cost: 700.0000	
Supervisor:		Currency: USD	
Contract Reference:		Total Cost before RFQ:	
Contract Type:			

Callouts:

- Status is approved** (points to Status: APPR)
- The Create RFQ button becomes available when the PR changes status to WRFQ (Waiting on RFQ)** (points to Create RFQ button)
- The Create PO(s) button will be available ONLY if the PR is not in Workflow and An RFQ was not created OR The RFQ was created and is either fully processed (Finalized) or cancelled** (points to Create PO(s) button)

Sample RFQ: Inventory Items/Materials

If the PR is approved and in workflow, the buyer should workflow the record and select Change Status to WRFQ and Hold

The screenshot shows a PR record for 'MSA Ultima X5000 Gas Monitor with visible and audible alarm'. A 'Manual Input' dialog box is open, listing several options:

- Stop Workflow to Create PO
- Change Status to WRFQ and Hold
- Return PR to Originator
- Return PR to Senior VP Plant Operations
- Send to CIP-013 Review Team
- Cancel PR

 A red arrow points to the selected option. Below the list is a 'Memo:' field and 'OK' and 'Cancel' buttons. The background shows PR details like 'Priority: 1', 'Requested By: RAYC', and 'Requested For: RAYC'.

If the PR is approved or in WRFQ status and not in workflow, the buyer should workflow the record and select Change Status to WRFQ and Hold

The screenshot shows the same PR record with a 'Manual Input' dialog box. The options are:

- Route PR for Approvals
- Close PR
- Change Status to WRFQ and Hold (PR Must be in APPR or WRFQ Status)

 A red arrow points to the selected option. Below the list is a 'Memo:' field and 'OK' and 'Cancel' buttons. The background shows PR details including 'WF Last Mer' and 'MILLEJOH'.

Sample RFQ: Inventory Items/Materials

Create the RFQ using Create RFQ button

PR: PR146980 Electrical items for stock in the electrical cabinet in the I&C shop

Notes:

WF Last Memo Details: MILLEJOH 2/2/22 1:30 PM
Wed Feb 02 13:30:16 EST 2022

Site: CHATT
Status: WRFQ
Attachments

Status is Waiting RFQ

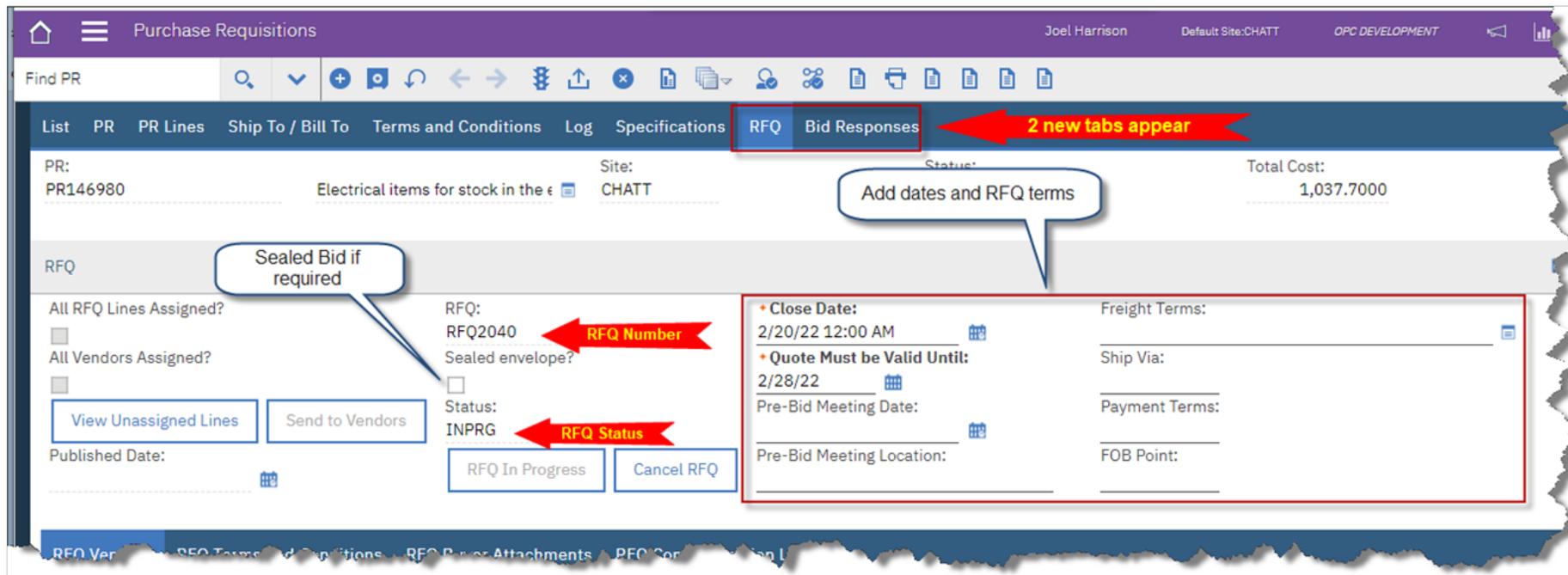
Details	Dates	Costs	Bid/Quote
Priority: 1	Status Date: 2/2/22 1:31 PM	Pretax Total: 1,037.7000	Bid and/or Quote:
Requested By: RAYC	Requested Date: 2/2/22 1:26 PM	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
Requested For: RAYC	Required Date: 2/20/22 12:00 AM	Total Cost: 1,037.7000	
Supervisor:		Currency: USD	
Contract Reference:		Total Cost before RFQ: 0.0000	
Contract Type:			
Contract Revision:			
Accrual:			
Vendor Invoice Number:			

Create RFQ button is enabled. Click to create RFQ

Create RFQ
Create PO(s)

Sample RFQ: Inventory Items/Materials

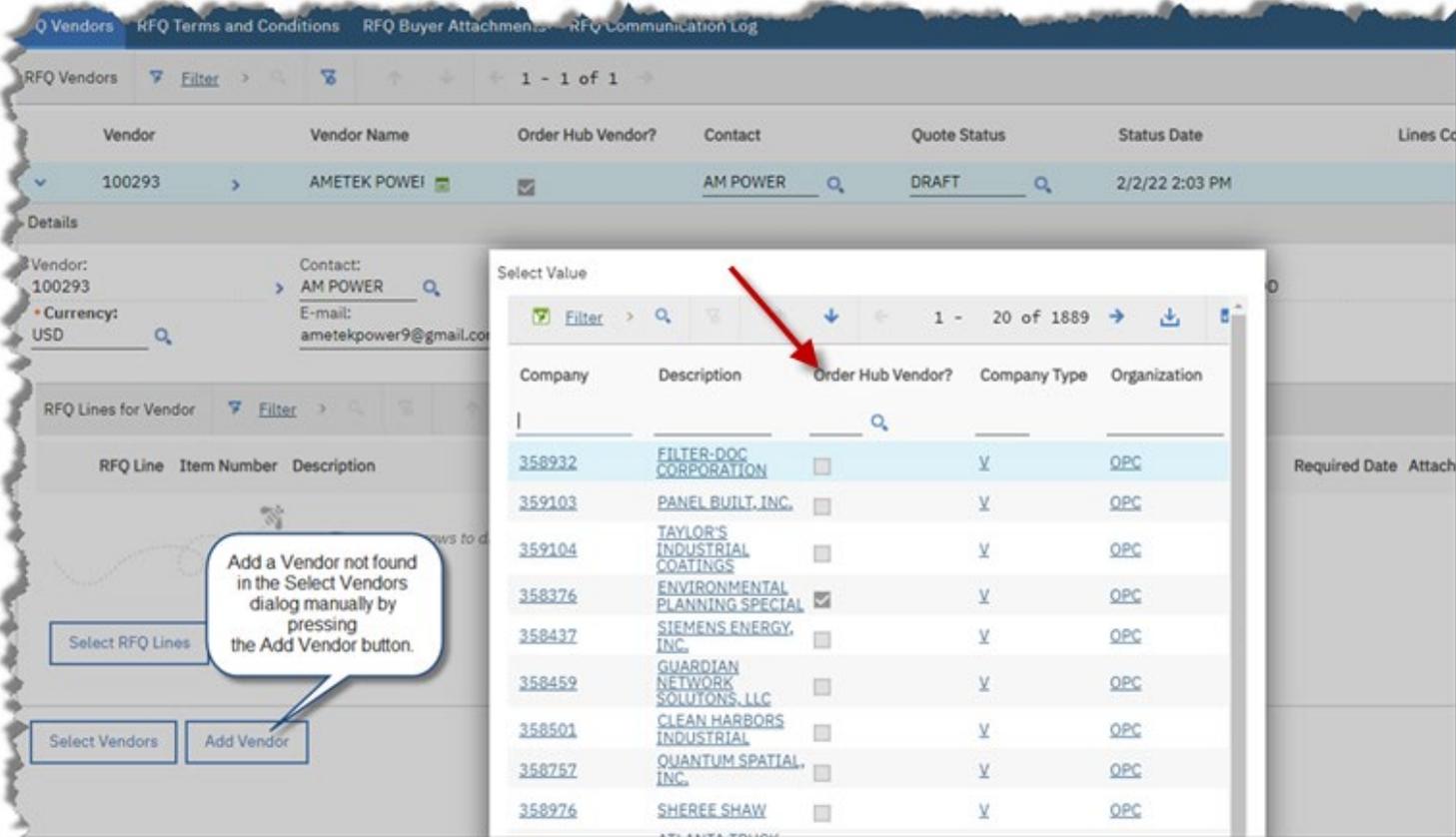
Once the RFQ is created, the RFQ and Bid Response tabs are visible
 “Close Date” and “Quote Must be Valid Until” are required fields.



- Close Date – Quotes will not be accepted after this date/time.
- Quote Must be Valid Until – Any quotes submitted should be valid until this date

Sample RFQ: Inventory Items/Materials

Add vendors to RFQ – Add Vendor button



The screenshot shows a software interface for adding vendors to an RFQ. A modal window titled "Select Value" is open, displaying a list of vendors. The list includes columns for Company, Description, Order Hub Vendor?, Company Type, and Organization. A red arrow points to the "Add Vendor" button in the background interface.

Company	Description	Order Hub Vendor?	Company Type	Organization
358932	FILTER-DOC CORPORATION	<input type="checkbox"/>	Y	QPC
359103	PANEL BUILT, INC.	<input type="checkbox"/>	Y	QPC
359104	TAYLOR'S INDUSTRIAL COATINGS	<input type="checkbox"/>	Y	QPC
358376	ENVIRONMENTAL PLANNING SPECIAL	<input checked="" type="checkbox"/>	Y	QPC
358437	SIEMENS ENERGY, INC.	<input type="checkbox"/>	Y	QPC
358459	GUARDIAN NETWORK SOLUTIONS, LLC	<input type="checkbox"/>	Y	QPC
358501	CLEAN HARBORS INDUSTRIAL	<input type="checkbox"/>	Y	QPC
358757	QUANTUM SPATIAL, INC.	<input type="checkbox"/>	Y	QPC
358976	SHEREE SHAW	<input type="checkbox"/>	Y	QPC

Callout text: Add a Vendor not found in the Select Vendors dialog manually by pressing the Add Vendor button.

RFQ will only allow Order Hub vendors. Non-Order Hub vendors are visible but cannot be selected.

Sample RFQ: Inventory Items/Materials

Details

Vendor: 100293 Contact: AM POWER Phone: Payment Terms: NET30 Freight Terms: PREPAID AND ADD
 Currency: USD E-mail: ametekpower9@gmail.com Fax: Ship Via: FOB Point: Factory

RFQ Lines for Vendor Filter 0 - 0 of 0

Select RFQ Lines that will be sent to this vendor for bidding.

Select RFQ Lines

Select RFQ Lines for 100293 Filter 1 - 1 of 1

RFQ Line #	Item Number	Description	Catalog #	Manufacturer	Model	Order Unit	Contract #	Contract Price
<input type="checkbox"/>	1 5987	BATTERY ALKALINE, AAA				CASE24		

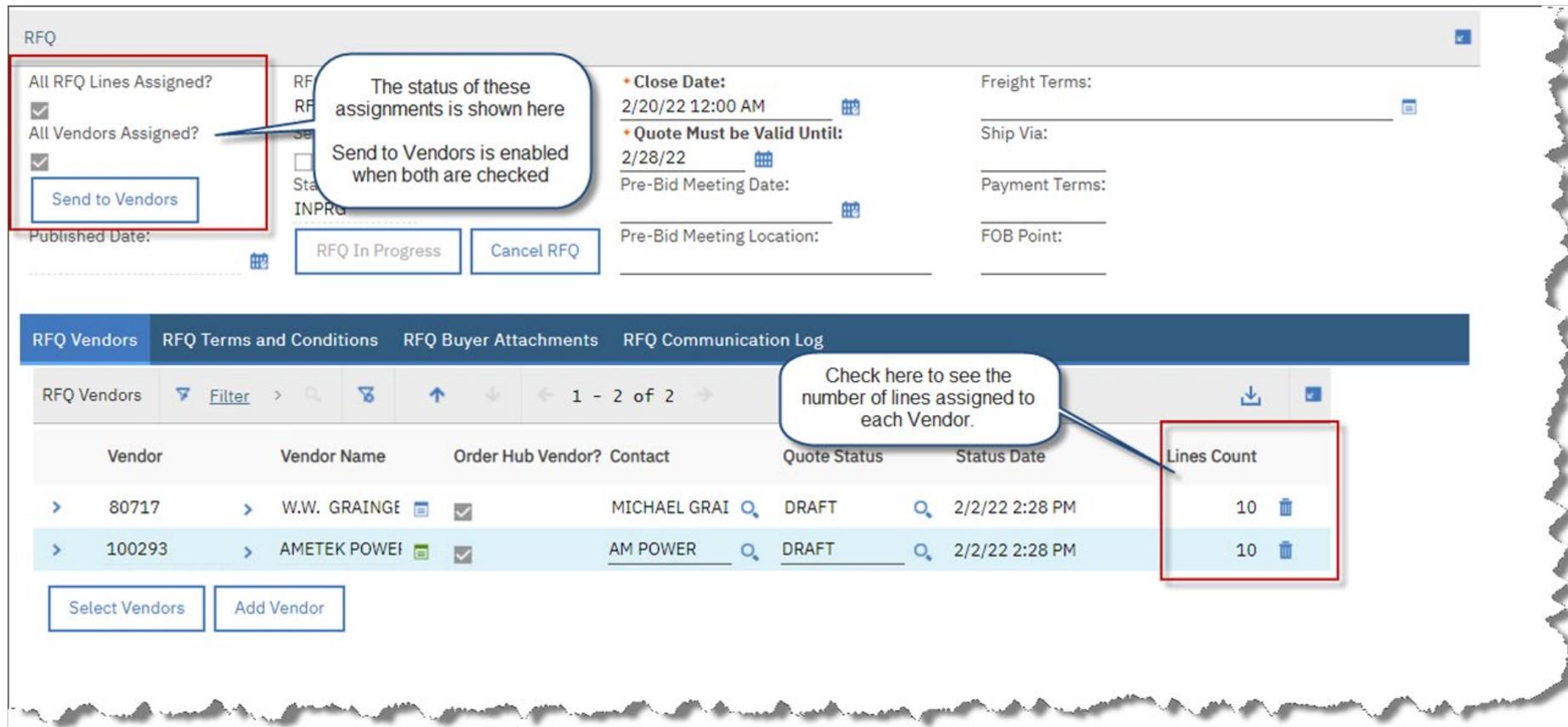
OK Cancel

Continue to add vendors and lines as required

Sample RFQ: Inventory Items/Materials

If any vendor(s) or items remain unassigned Maximo will not allow further processing.

Once all vendors have at least one line assigned, and all lines are assigned to at least one vendor the two checkboxes will be checked.



The screenshot displays the Maximo RFQ interface. At the top, there are two checkboxes: "All RFQ Lines Assigned?" and "All Vendors Assigned?", both of which are checked. A "Send to Vendors" button is located below these checkboxes. A callout box points to these checkboxes with the text: "The status of these assignments is shown here" and "Send to Vendors is enabled when both are checked".

Below the checkboxes, there are several fields for RFQ details: "Close Date" (2/20/22 12:00 AM), "Quote Must be Valid Until" (2/28/22), "Pre-Bid Meeting Date", "Pre-Bid Meeting Location", "Freight Terms", "Ship Via", "Payment Terms", and "FOB Point".

The main section of the interface is a table titled "RFQ Vendors". The table has columns for Vendor, Vendor Name, Order Hub Vendor?, Contact, Quote Status, Status Date, and Lines Count. Two vendors are listed: 80717 (W.W. GRAINGE) and 100293 (AMETEK POWER). Both vendors have a "Lines Count" of 10. A callout box points to the "Lines Count" column with the text: "Check here to see the number of lines assigned to each Vendor." Below the table are "Select Vendors" and "Add Vendor" buttons.

Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
80717	W.W. GRAINGE	<input checked="" type="checkbox"/>	MICHAEL GRAI	DRAFT	2/2/22 2:28 PM	10
100293	AMETEK POWER	<input checked="" type="checkbox"/>	AM POWER	DRAFT	2/2/22 2:28 PM	10

Sample RFQ: Inventory Items/Materials

Attachments can be added from the RFQ tab and from the PR Lines tab

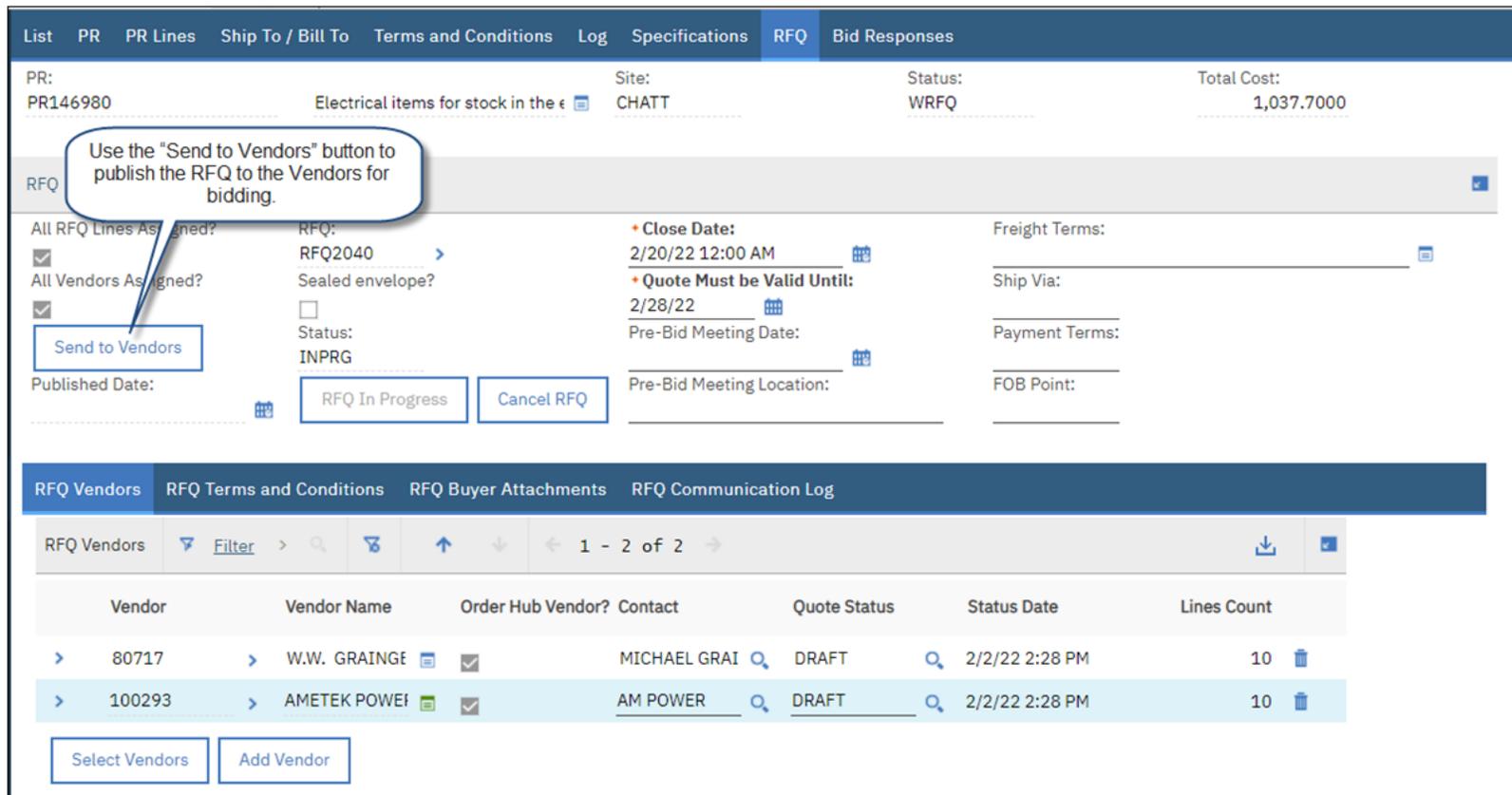
The screenshot displays the software interface for managing RFQs and PR Lines. The top navigation bar includes tabs for List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The main content area is split into two panes. The left pane shows the RFQ details for PR146980, including 'Electrical items for stock in the c', 'Site: CHATT', and 'Status: WRFO'. Below this, there are sections for 'RFQ' and 'Attachments'. The 'Attachments' section has a table with columns for Document, Description, and Document Folder. Three buttons are highlighted with a red box: 'Add New File', 'Add New Web Page', and 'Add from Library'. The right pane shows the 'PR Lines' table with columns for Line, Line Type, Item, Description, Quantity, Order Unit, Unit Cost, Line Cost, Tax, and Load. A 'Line Item' detail view is open for Line 1, showing 'Material' type and 'STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH'. A 'Line Attachments' dialog box is overlaid on the PR Lines view, showing a table with columns for Document, Description, Document Folder, Document Version, Print?, and Application. One attachment is listed: 'SPEC LINE' with 'Line attachment: DOCUMENTS'. Three buttons are also highlighted in this dialog: 'Add New File', 'Add New Web Page', and 'Add from Library'. A 'Line Attachments' button is also visible at the bottom of the PR Lines view.

These attachments are sent to all vendors on the RFQ when the RFQ is sent to the vendors

Sample RFQ: Inventory Items/Materials

Publish RFQ for vendors to bid

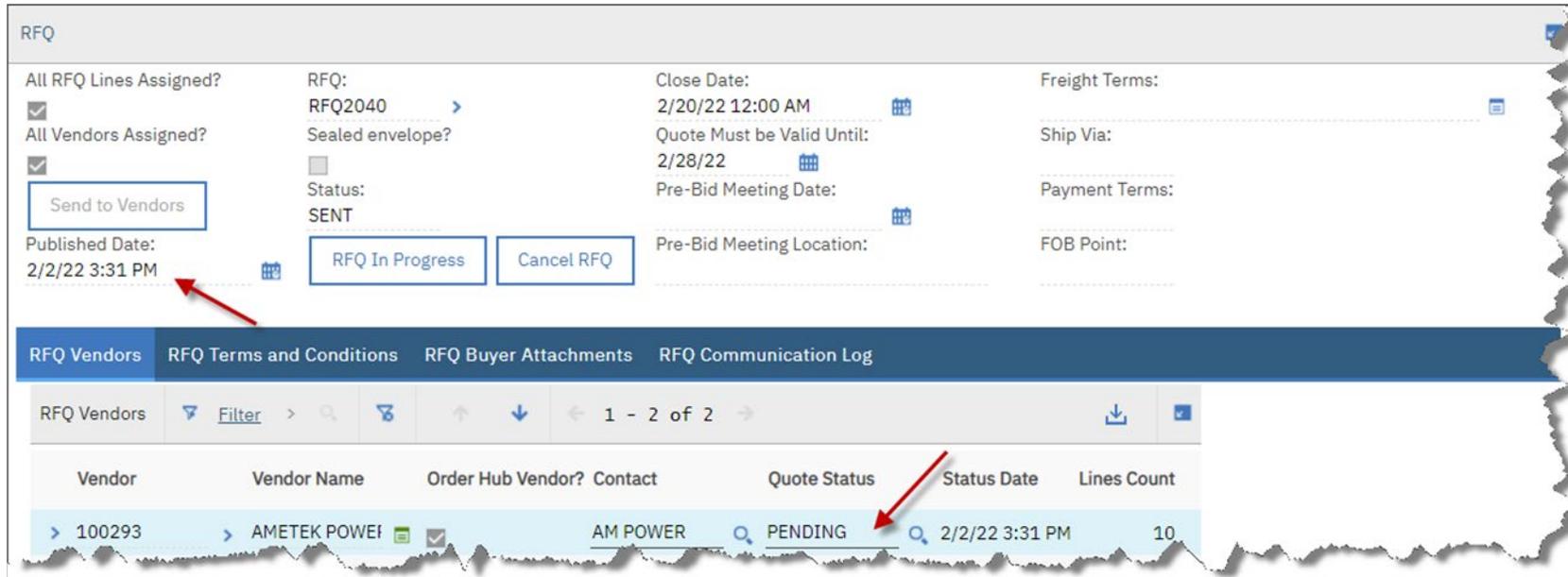
Once all the vendors and lines are assigned and any attachments required are attached, use the “Send to Vendors” button to publish the RFQ to the Vendors for bidding.



The screenshot displays the RFQ management interface. At the top, there are tabs for List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The RFQ details section shows PR: PR146980, Site: CHATT, Status: WRFAQ, and Total Cost: 1,037.7000. A callout box points to the 'Send to Vendors' button with the text: "Use the 'Send to Vendors' button to publish the RFQ to the Vendors for bidding." Below this, there are checkboxes for 'All RFQ Lines Assigned?' and 'All Vendors Assigned?'. The 'Send to Vendors' button is highlighted. The 'RFQ Vendors' section shows a table with two vendors: 80717 (W.W. GRAINGE) and 100293 (AMETEK POWER). Both vendors have a 'Quote Status' of 'DRAFT' and a 'Status Date' of 2/2/22 2:28 PM. The 'Send to Vendors' and 'Add Vendor' buttons are visible at the bottom of the vendor list.

Sample RFQ: Inventory Items/Materials

The published date will show when the RFQ was sent to the vendors



The screenshot displays the RFQ management interface. At the top, the 'Published Date' is shown as 2/2/22 3:31 PM, with a red arrow pointing to it. Below this, there are tabs for 'RFQ Vendors', 'RFQ Terms and Conditions', 'RFQ Buyer Attachments', and 'RFQ Communication Log'. The 'RFQ Vendors' tab is active, showing a table with the following columns: Vendor, Vendor Name, Order Hub Vendor?, Contact, Quote Status, Status Date, and Lines Count. A red arrow points to the 'Quote Status' column, which shows 'PENDING' for the vendor 'AMETEK POWER'. The 'Status Date' for this vendor is 2/2/22 3:31 PM.

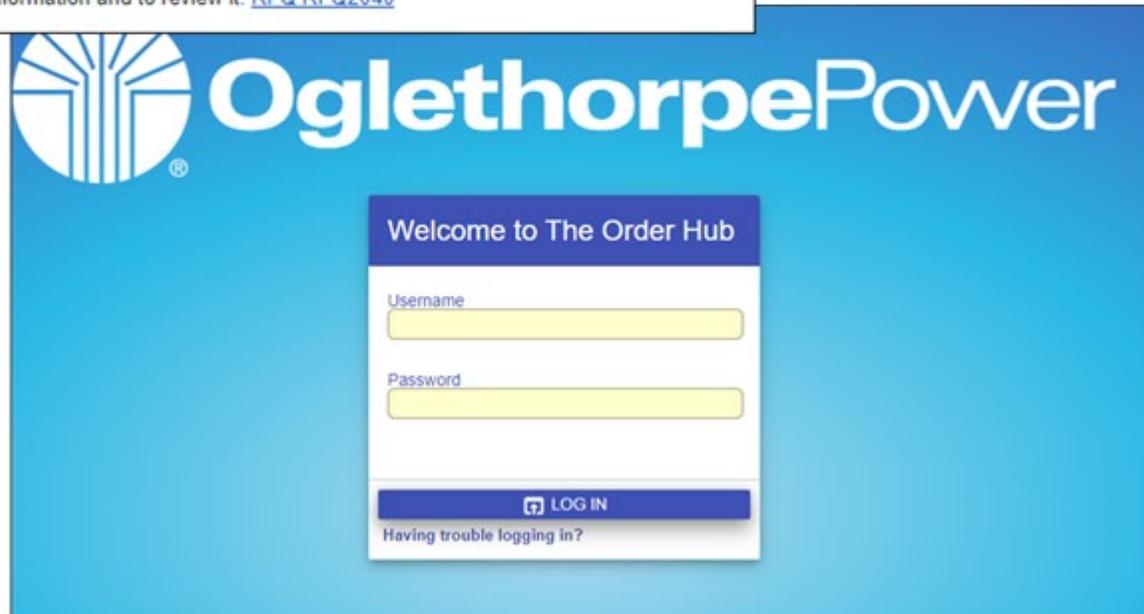
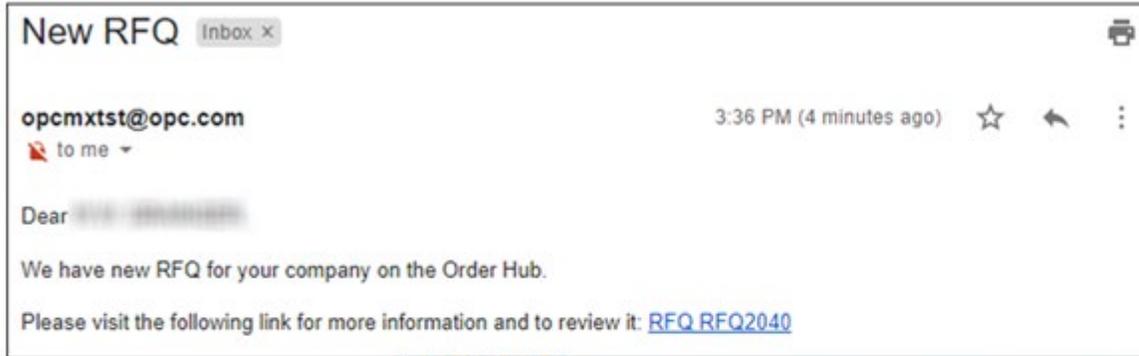
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
100293	AMETEK POWER	<input checked="" type="checkbox"/>	AM POWER	PENDING	2/2/22 3:31 PM	10

Quote status will change from DRAFT to PENDING for each vendor.

The vendor will receive a notification within (5) minutes.

Sample RFQ: Inventory Items/Materials

Each vendor's contact on the RFQ will be notified by Email.
They use the Order Hub to process the quote.



After logging in the Vendor is taken directly to the RFQ...

The Order Hub - Development
Welcome, Biljana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS TERMS & CONDITIONS EVENT LOG ATTACHMENTS (1) VENDOR ATTACHMENTS (0)

Buyer Information



Name: Oglethorpe Power
Address: Arcadia, Arcadia, WI, 54612
E-mail: m.wilson@helwig.com
Contact name: Mike Wilson
Phone: (617) 555-9017

4d 13h 39m 4s

Status & Dates

Publish Date	Close Date	Status
01/13/2022 02:41	01/18/2022 02:34	PENDING

Pre-Bid Meeting

Date/Time	Pre-Bid Meeting Location
01/17/2022 02:34	Online meeting

Confirmed/Rejected

Date	Confirmed/Rejected Comment

Quote Submitted Date

Quote Must be valid until
01/31/2022

General Terms

This is a RFQ for a one time purchase

Payment Terms:

Freight Terms:

Ship Via:

Fob Point:

Currency: USD

Quote #:

Quote Valid Until:

Description: Replacement Pillows for UPS-A Batteries

RFQ Lines

Show 10 entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	Vendor:	12"X12X ABSORB & NEUTRALIZE PILLOW			30	EACH		No	
2	Vendor:	4"X24" ABSORB & NEUTRALIZE SOCS			15	EACH		No	
3	Vendor:	INSTALLATION LABOR			1	EACH		No	

Showing 1 to 3 of 3 entries

Review RFQ and confirm will Bid

All Lines are initially red, and will remain red until updated.

Color Coded Lines help track progress of bid

The Order Hub - Development
Welcome, Bijana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

[← BACK](#)
[X DECLINE BID](#)
[UPDATE](#)
[REPORT A TECHNICAL ISSUE](#)

[DETAILS](#) [TERMS & CONDITIONS](#) [EVENT LOG](#) [ATTACHMENTS \(1\)](#) [VENDOR ATTACHMENTS \(0\)](#)

Buyer Information



Name: Oglethorpe Power
Address: Arcadia, Arcadia, WI, 54612
E-mail: m.wilson@helwig.com
Contact name: Mike Wilson
Phone: (617) 555-9017

3d 23h 35m 29s

Status & Dates

Publish Date	Close Date	Status
01/13/2022 02:54	01/18/2022 02:44	CONFIRMED
Pre-Bid Meeting Date/Time	Pre-Bid Meeting Location	
01/17/2022 02:44	Online meeting	
Confirmed/Rejected Date	Confirmed/Rejected Comment	
01/14/2022 02:29	Confirmed.	
Quote Submitted Date	Quote Must be valid until	
	01/31/2022	

General Terms

This is a RFQ for a one time purchase

Payment Terms: Freight Terms:

Ship Via: Fob Point:

Currency: USD

Quote #: Quote Valid Until *:

Description: Replacement Pillows for UPS-A Batteries

RFQ Lines

Show entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	Vendor:	12"X12X ABSORB & NEUTRALIZE PILLOW			30	EACH	32.0000	No	
2	Vendor:	4"X24" ABSORB & NEUTRALIZE SOCS			15	EACH	10.0000	No	
3	Vendor:	INSTALLATION LABOR			1	EACH		No	

Showing 1 to 3 of 3 entries

Ship To

Franklin, MA
10987 Oak Street
Franklin, MA, 03420

Reply To

Main addr Bedford MA Site of EAGLE Inc. NA
100 Crosby Drive
Bedford, MA, 01730 / KATHYB

Summary

# Of Lines with Quantity Difference:	0
# Of Lines where there is Delivery Date Difference	1
# Of non-bid Lines	0
# Of Lines where Item Substitution Approval is Required:	0
# of non-reviewed lines	1
# of lines requiring further attention	1
# of reviewed and finalized lines	1
Awarded	1

Vendor Totals
Total: \$1,110.0000 USD

Green Lines have been reviewed and are ready to be submitted.

Yellow means work in progress – Internal Hold

Red line have not been updated yet!

Then for each line they enter Price and other details

Quotation line / RFQ Line # 1

DETAILS BUYER ATTACHMENTS (1) VENDOR ATTACHMENTS (0)

Buyer Request

Item # Description

Catalog Code Manufacturer Model #

Allow Substitution

Contract # Contract Price

Quantity UOM Delivery Date

Remarks

Catalog Details

Catalog # Description *

Manufacturer Model #

Vendor Response

We are responding with:
 Exactly as requested As requested, but with data corrections

Please explain the difference *

Quantity *	UOM	Reason for Changed Quantity *
<input type="text" value="32.00"/>	<input type="text" value="EACH"/>	<input type="text" value="Packaging"/>

Unit Price *	Currency	Line cost	Delivery Date
<input type="text" value="32.0000"/>	<input type="text" value="USD"/>	<input type="text" value="1024.0000"/>	<input type="text" value="01/31/2022"/>

Remarks

Not bidding on line

UPDATE CANCEL

Vendor can update any missing information

Vendor enter bid price

Vendor can chose NOT to bid on a line

Buyer Request

Vendor Response

Attachments can be sent at RFQ or RFQ Line level

The Order Hub - Development
Welcome, Biljana Jovanovic

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS TERMS & CONDITIONS EVENT LOG **ATTACHMENTS (1)** VENDOR ATTACHMENTS (0)

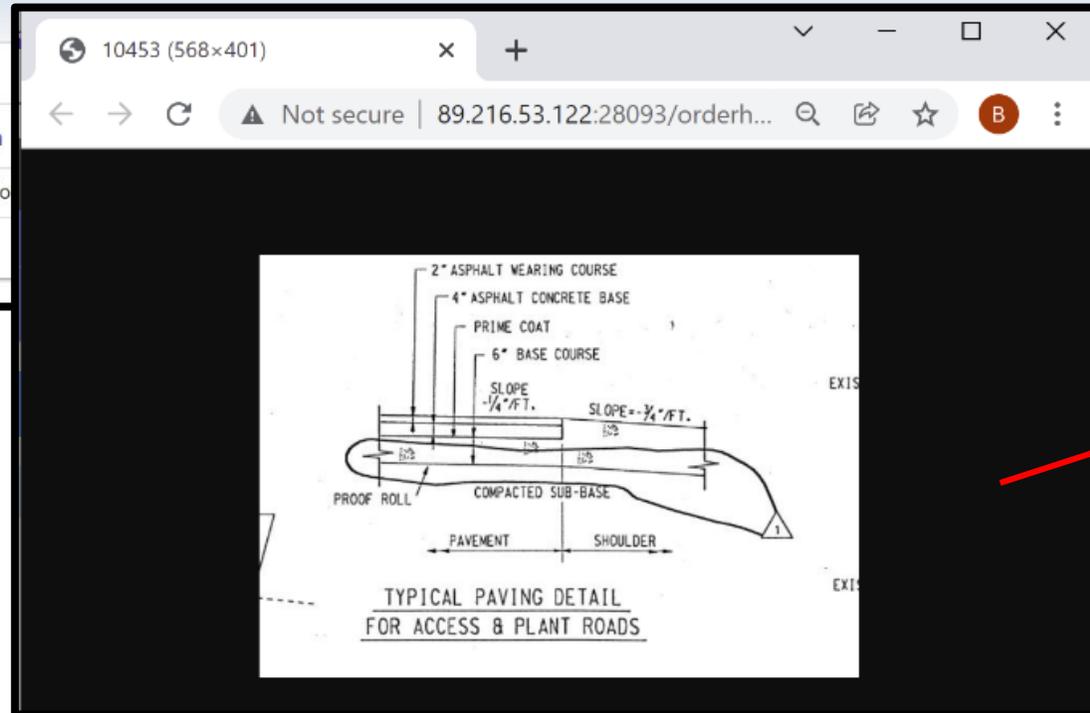
Documents

Id	Name	Description
SPEC1		RFQ spec do

Showing 1 to 1 of 1 entries

← BACK
× DECLINE BID
UPDATE
REPORT A TECHNICAL ISSUE

Type	Synced?	Actions
Attachments	No	↓



View or download

All events and communication with the Buyer are logged in the same place – Order Hub & the Event Log and Comm Log in Maximo

The Order Hub - Development
Welcome, Biljana Jovanovic

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS TERMS & CONDITIONS **EVENT LOG** ATTACHMENTS (1) VENDOR ATTACHMENTS (1)

State History

Show 10 entries

Date	From	To	Status	Description	Subject
01/16/2022 16:27	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor communication to Buyer	RE: RFQ RFQ1262 - clarification required
01/16/2022 16:07	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer communication to Vendor	Request for Quote RFQ1262 notification
01/16/2022 16:03	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	General Notice to all Vendors	Request for Quote RFQ1262 - Amendment
01/14/2022 03:23	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Submits Bid	Bid Submission
01/14/2022 02:29	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirms will Bid	RE: RFQ RFQ1262, P2INSIGHT INC. intends to bid
01/14/2022 02:17	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected bidding on RFQ	RE: RFQ RFQ1262, P2INSIGHT INC. will NOT bid
01/13/2022 03:46	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirms will Bid	RE: RFQ RFQ1262, P2INSIGHT INC. intends to bid
01/13/2022 03:35	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected bidding on RFQ	RE: RFQ RFQ1262, P2INSIGHT INC. will NOT bid
01/13/2022 02:55	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer send RFQ to Vendors.	New RFQ

Showing 1 to 9 of 9 entries

Communication Log:
Buyer's email notifications
and your messages

System logged events:

- New RFQ
- Reject to bid
- Confirm will bid
- Submit Bid
- Notice of RFQ Cancellation
- Awarded RFQs - Win/Regret Notifications

Buyer can send notifications. Vendor can reply or ask for Clarification if appropriate or necessary.

The Order Hub - Development
Welcome, Biljana Jovanovic

P2Insight

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS TERMS & CONDITIONS **EVENT LOG** ATTACHMENTS (1) VENDOR ATTACHMENTS (1)

← BACK
UPDATE
SUBMIT TO CUSTOMER
REPORT A TECHNICAL ISSUE

State History

Show 10 entries

Date	From	To	Status	Description	Subject
01/16/2022 16:27	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor communication to Buyer	RE: RFQ RFQ1262 - clarification required
01/16/2022 16:07	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer communication to Vendor	Request for Quote RFQ1262 notification
01/16/2022 16:03	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	General Notice to all Vendors	Request for Quote RFQ1262 - Amendment
01/14/2022 03:23	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Submits Bid	Bid Submission
01/14/2022 02:29	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirmation	
01/14/2022 02:17	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected	
01/13/2022 03:46	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor Confirmation	
01/13/2022 03:35	opc.biljana@gmail.com	m.wilson@helwig.com	SENT	Vendor rejected	
01/13/2022 02:55	m.wilson@helwig.com	opc.biljana@gmail.com	SENT	Buyer send RFQ	

Showing 1 to 9 of 9 entries

CREATE COMMUNICATION LOG

Message

To: opc.biljana@gmail.com

From: m.wilson@helwig.com

Subject: Request for Quote RFQ1262 notification

Message

Request for Quote RFQ1262 - additional information

Enter content here

Show 10 entries

Id	Name	Description	Type	Synced?	Actions
----	------	-------------	------	---------	---------

No data available in table

Showing 0 to 0 of 0 entries

REPLY CANCEL

Status Change

To: m.wilson@helwig.com

From: opc.biljana@gmail.com

Subject: RE: Request for Quote RFQ1262 notification

Message

ADD NEW DOCUMENT

Show 10 entries

Id	Name	Description	Type	Synced?	Actions
----	------	-------------	------	---------	---------

No data available in table

Showing 0 to 0 of 0 entries

SAVE CANCEL

When all line are priced, they turn green, and Vendor can submit the bid...

☰
P2Insight

The Order Hub - Development
Welcome, Biljana Jovanovic

REQUEST FOR QUOTATION

RFQ #: RFQ1262

DETAILS
TERMS & CONDITIONS
EVENT LOG
ATTACHMENTS (1)
VENDOR ATTACHMENTS (0)

Buyer Information



Name
Oglethorpe Power

Address: Arcadia, Arcadia, WI, 54612
E-mail: m.wilson@helwig.com
Contact name: Mike Wilson
Phone: (617) 555-9017

3d 23h 28m 43s

Status & Dates

Publish Date	Close Date	Status
01/13/2022 02:54	01/18/2022 02:44	CONFIRMED
Pre-Bid Meeting		
Date/Time	Pre-Bid Meeting Location	
01/17/2022 02:44	Online meeting	
Confirmed/Rejected		
Date	Confirmed/Rejected Comment	
01/14/2022 02:29	Confirmed.	
Quote Submitted Date	Quote Must be valid until	
	01/31/2022	

General Terms

This is a RFQ for a one time purchase

Payment Terms **Freight Terms**

Ship Via **Fob Point**

Currency
USD

Quote # **Quote Valid Until ***

Description
Replacement Pillows for UPS-A Batteries

RFQ Lines

Show 10 entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	Vendor:	12"X12X ABSORB & NEUTRALIZE PILLOW			30	EACH	32.0000	No	
2	Vendor:	4"X24" ABSORB & NEUTRALIZE SOCS			15	EACH	22.0000	No	
3	Vendor:	INSTALLATION LABOR			1	EACH	2500.0000	No	

Showing 1 to 3 of 3 entries

⚙️

- ← BACK
- ✕ DECLINE BID
- 🔄 UPDATE
- 📄 SUBMIT TO CUSTOMER
- 🚩 REPORT A TECHNICAL ISSUE

Sample RFQ: Inventory Items/Materials

Quote status changes to CONFIRMED if the vendor intends to bid and DECLINED if the vendor declines to bid

RFQ Vendors						
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	
358916	NABCO ELECTR	<input checked="" type="checkbox"/>	JANE NABCO	CONFIRMED	9/7/22 7:28 AM	
359334	MULLINS MECH	<input checked="" type="checkbox"/>	JOHN MULLINS	DECLINED	9/7/22 7:31 AM	

Quote status changes to SUBMITTED when the vendor has submitted their bid unless the bid is sealed

RFQ Vendors						
Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
358916	NABCO ELECTR	<input checked="" type="checkbox"/>	JANE NABCO	SUBMITTED	6/29/22 3:49 PM	2
359334	MULLINS MECH	<input checked="" type="checkbox"/>	JOHN MULLINS	PENDING	6/29/22 3:05 PM	2

Sample RFQ: Inventory Items/Materials

Once submitted bids can be reviewed on the Bid Response tab for each line. The requested information and the vendor response is displayed side by side.

Quotations for Vendor 80717 Filter 1 - 4 of 4

Line	Item	Description	Catalog #	Manufacturer	Model	Quantity	Order Unit	Curre
1		FOLDING SHELF; STEEL, LIGHT GRAY POWDER	32FC20	HOFFMAN	AA35SHLF1818	5.0000	EA	USD
2		STORCH PRODUCTS DISC MAGNET: NEODYMIUM, NICKEAX. PULL, 0.12 IN THICK, 1 IN DIA	35KC23	STORCH	B002-6025-035N	20.0000	EA	USD
3		USB CABLE: 2.0, 6 FT CABLE LG, BLACK, A MALE TO 5 PI	5XFY4	MONOPRICE	5458	5.0000	EA	USD
4		SHIPPING				1.0000	EA	USD

Line Item	Buyer Request	Vendor Response
RFQ Line: 1	Description: FOLDING SHELF; STEEL, LIGHT GRAY POWDER	Description: FOLDING SHELF; STEEL, LIGHT GRAY POWDER
Item:	Catalog #: 32FC20	Catalog #: 32FC20
Allow Substitution: No	Manufacturer: HOFFMAN	Manufacturer: HOFFMAN
Commodity Group:	Model: aa35shlf1818	Model: AA35SHLF1818
Commodity:	Required Date: 4/4/22	Delivery Date: 4/20/22
Contract #:	Quantity: 5.0000	Quantity: 5.0000
Contract Price:	Order Unit: EA	Order Unit: EA
	Currency: USD	Unit Cost: 497.7000
	Base Currency: USD	Base Unit Cost: 497.7000
	Remarks:	Is Update? <input checked="" type="checkbox"/>
		Update Reason: Additional Catalog information provided
		Is Substitute? <input type="checkbox"/>
		Substitution Reason:
		No Bid on Line? <input type="checkbox"/>
		Vendor Remarks:
		Qty Change Reason:

Buyer Request information displayed on the left

Vendor Response information displayed on the right

Sample RFQ: Inventory Items/Materials

Buyer can also review all submissions on the “Comparative Selection” tab.
Bids cannot be awarded until RFQ Status changes to BIDSELECT.

Line	Item	Not Awarding?	Vendor 1	Unit Cost	Awarded?	Vendor 2	Unit Cost	Awarded?	Vendor 3	Unit Cost	Awarded?	Vendor 4	Unit Cost	Awarded?
1	STCRB121 STL-CTY RB121 3/4X1/2 RED BUSH	<input type="checkbox"/>	AMETEK POWER INSTRUMENT	3.0000	<input type="checkbox"/>	W.W. GRAINGER	2.0000	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>

Requested ←

Responses are displayed side by side with differences highlighted in RED

Sample RFQ: Inventory Items/Materials

Request for Quote Details Report

RFQ1999: Fall 2022 Major

Site: CHATT
 Requested By: [Redacted]
 Status: FINALIZED
 Required Date: 8/24/22
 Requested Date: 8/24/22
 Sealed Bid: No
 Est. Total Cost: \$6.00

RFQ Line Details

Line	Description	Quantity	Order Unit	Est. Unit Cost	Est. Line Cost
1	2 WEEK RENTAL - PUMP, TRASH, DIESEL POWERED, 4"	2	EA	\$1.00	\$2.00
2	2 WEEK RENTAL - HOSE, 4", RIGID, 160 LENGTH	1	EA	\$1.00	\$1.00
3	2 WEEK RENTAL - STRAINER, DEWATERING, 4"	2	EA	\$1.00	\$2.00
4	2 WEEK RENTAL - ADAPTER, 4" MALE CAMLOCK TO 4" RIGID HOSE	1	EA	\$1.00	\$1.00
Total					\$6.00

Vendor Name	Status	Total Bid
[Redacted]	Quotation Lines Selected	\$3,972.32
[Redacted]	Regret	\$0.00

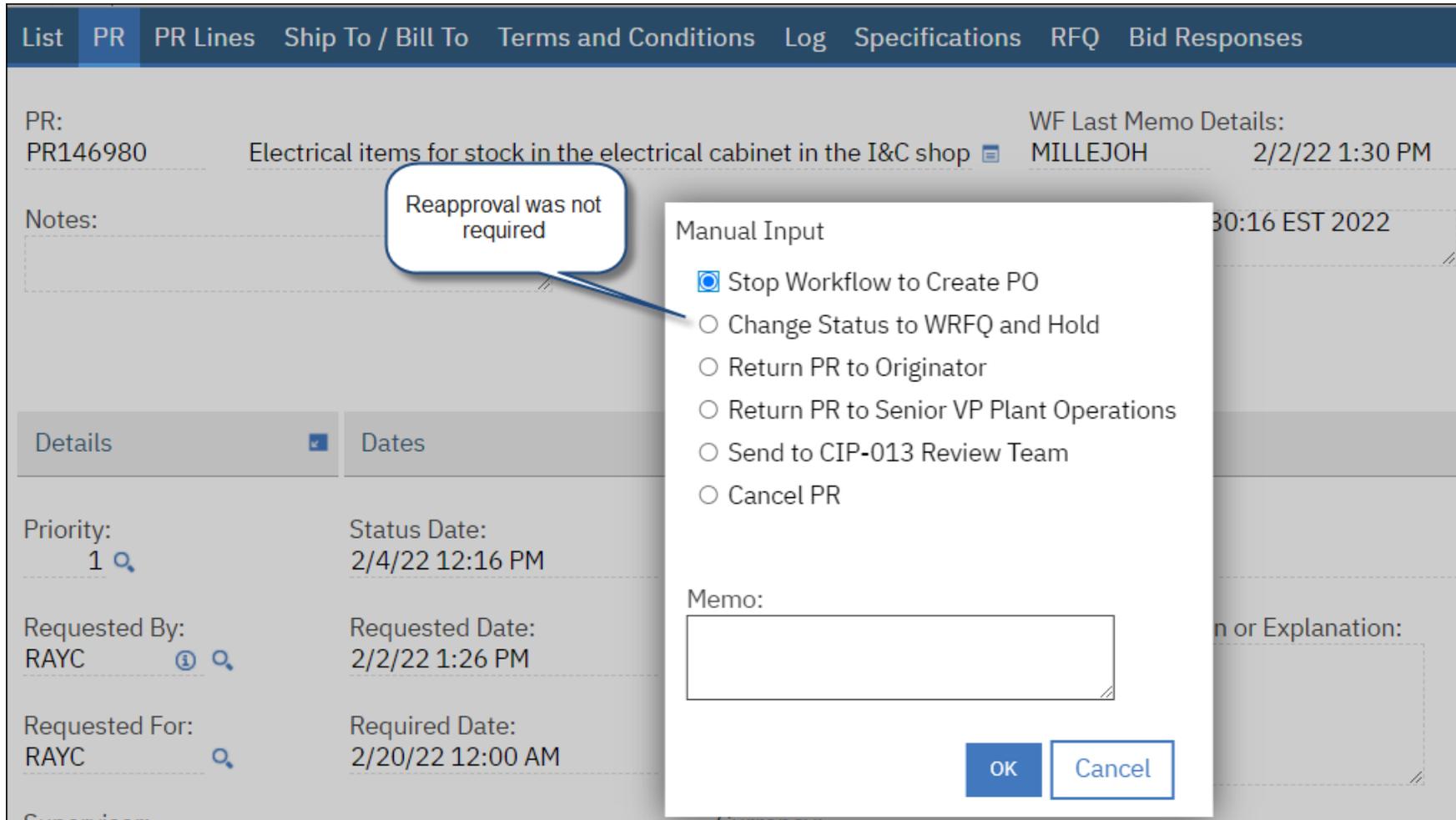
Bid Line Details

Line #	Name	Unit Cost	Delivery Date	Supplier Remarks	Declined to Bid?	Low Bid	Proposed Awarded Bid	Bid and/or Quote	Bid/Quote Exception	Quote Total Cost
Line # 1: null										
	[Redacted]	\$0.00								\$0.00
	[Redacted]	\$1,200.00	8/24/22	4" diesel pump	No	Yes	Yes	LOWBID		\$2,400.00
Line # 2: null										
	[Redacted]	\$0.00								\$0.00
	[Redacted]	\$1,440.00	8/24/22		No	Yes	Yes	LOWBID		\$1,440.00
Line # 3: null										
	[Redacted]	\$0.00								\$0.00
	[Redacted]	\$33.08	8/24/22		No	Yes	Yes	LOWBID		\$66.16
Line # 4: null										
	[Redacted]	\$0.00								\$0.00
	[Redacted]	\$66.16	8/24/22		No	Yes	Yes	LOWBID		\$66.16

9/6/22 4:51 PM

Sample RFQ: Inventory Items/Materials

Workflow PR for approval evaluation. Maximo sends to approvers if re-approval is required based on price changes.



The screenshot shows a Maximo PR (Purchase Request) record for PR146980. The PR description is "Electrical items for stock in the electrical cabinet in the I&C shop". The status is "MILLEJOH" and the last memo details are "2/2/22 1:30 PM". A callout box points to the PR description with the text "Reapproval was not required". A "Manual Input" dialog box is open, showing the following options:

- Stop Workflow to Create PO
- Change Status to WRFQ and Hold
- Return PR to Originator
- Return PR to Senior VP Plant Operations
- Send to CIP-013 Review Team
- Cancel PR

The dialog box also includes a "Memo:" field and "OK" and "Cancel" buttons. The background interface shows various fields such as "Priority: 1", "Status Date: 2/4/22 12:16 PM", "Requested By: RAYC", "Requested Date: 2/2/22 1:26 PM", and "Required Date: 2/20/22 12:00 AM".

Sample RFQ: Inventory Items/Materials

Before and after cost comparison

PR: PR150894 + Purchase Folding shelves to attach to new Transformer monito 

WF Last Memo Details:

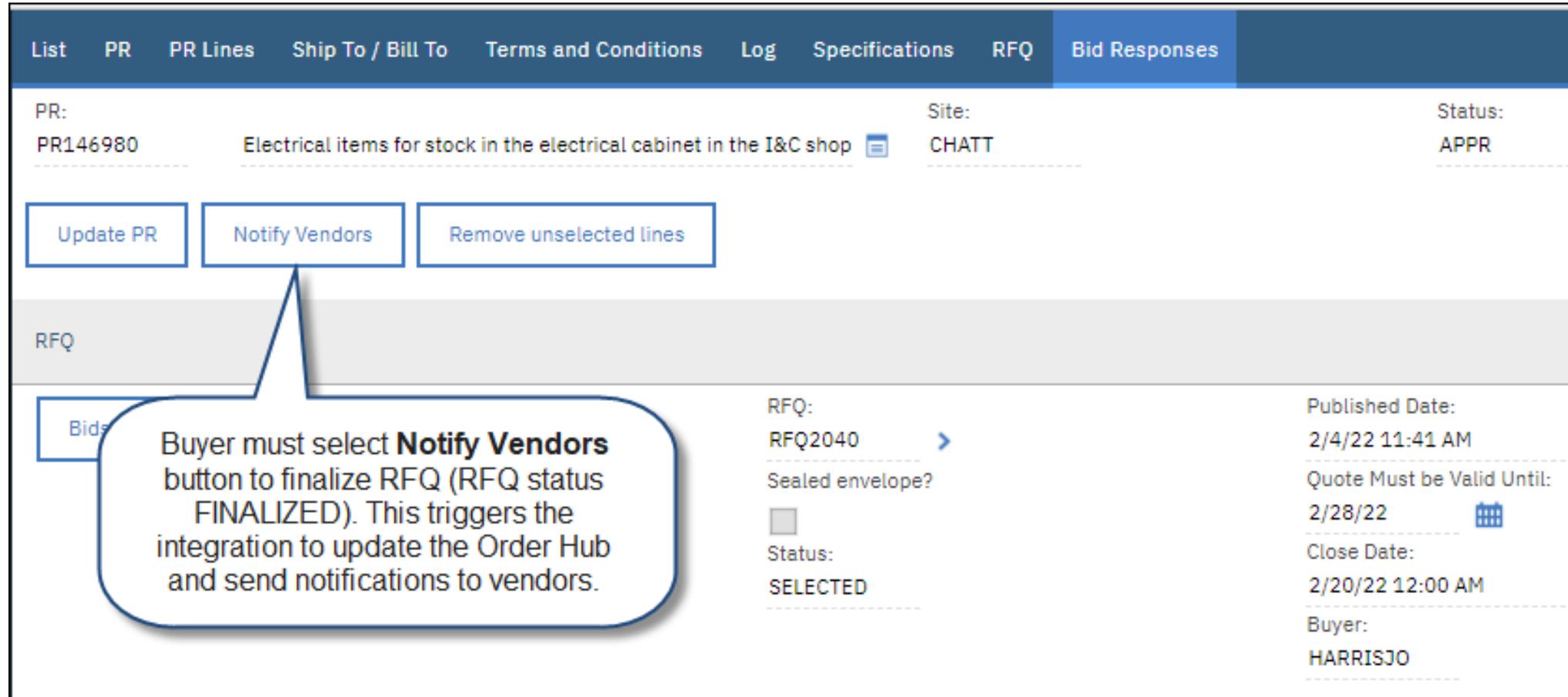
Notes:

Details 	Dates 	Costs 	Bid/Quote
+ Priority: 1 	Status Date: 5/4/22 3:19 PM 	Pretax Total: 2,638.2600	Bid and/or Quote: 
Requested By: MILLERN  	Requested Date: 4/1/22 8:26 AM 	Total Tax: 0.0000	Bid/Quote Exception or Explanation: <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
+ Requested For: MILLERN 	+ Required Date: 4/4/22 8:26 AM 	Total Cost: 2,638.2600	
Supervisor: _____ 		Currency: USD 	
Contract Reference: _____ 		Total Cost before RFQ: 2,727.2400	

Original total cost before RFQ and the new total cost after updating the PR with awarded bid.

Sample RFQ: Inventory Items/Materials

Next, send award/regret notifications and finalize the RFQ



Buyer must select **Notify Vendors** button to finalize RFQ (RFQ status FINALIZED). This triggers the integration to update the Order Hub and send notifications to vendors.

PR: PR146980 Electrical items for stock in the electrical cabinet in the I&C shop Site: CHATT Status: APPR

Update PR Notify Vendors Remove unselected lines

RFQ

Bids

RFQ: RFQ2040 Published Date: 2/4/22 11:41 AM

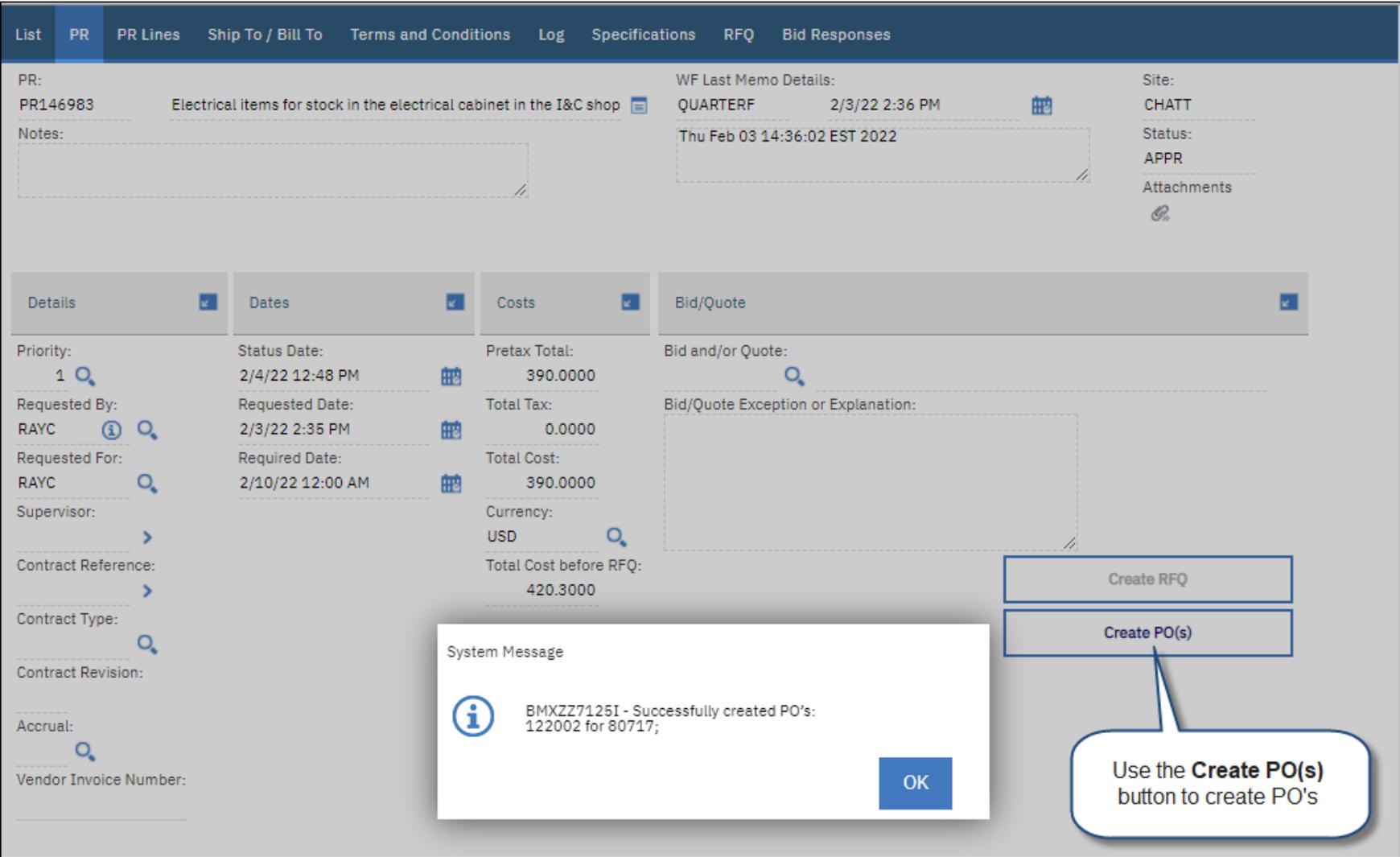
Sealed envelope? Quote Must be Valid Until: 2/28/22

Status: SELECTED Close Date: 2/20/22 12:00 AM

Buyer: HARRISJO

Sample RFQ: Inventory Items/Materials

The Create PO(s) button is now available.



The screenshot displays the RFQ interface for PR146983. The main header includes tabs for List, PR, PR Lines, Ship To / Bill To, Terms and Conditions, Log, Specifications, RFQ, and Bid Responses. The PR details show 'Electrical items for stock in the electrical cabinet in the I&C shop' with a status of 'CHATT' and 'APPR'. A 'Create PO(s)' button is highlighted with a callout box that says 'Use the **Create PO(s)** button to create PO's'. A system message dialog is open, displaying the text: 'System Message', 'BMXZZ7125I - Successfully created PO's: 122002 for 80717;', and an 'OK' button. The interface also shows various fields for dates, costs, and contract information.

Details	Dates	Costs	Bid/Quote
Priority: 1	Status Date: 2/4/22 12:48 PM	Pretax Total: 390.0000	Bid and/or Quote:
Requested By: RAYC	Requested Date: 2/3/22 2:35 PM	Total Tax: 0.0000	Bid/Quote Exception or Explanation:
Requested For: RAYC	Required Date: 2/10/22 12:00 AM	Total Cost: 390.0000	
Supervisor:		Currency: USD	
Contract Reference:		Total Cost before RFQ: 420.3000	
Contract Type:			
Contract Revision:			
Accrual:			
Vendor Invoice Number:			

Awarded Notification



E-mail notification

The Order Hub - Development 87026.Admin
Welcome, MATT WILEMON

REQUEST FOR QUOTATION

RFQ #: RFQ1058

DETAILS TERMS & CONDITIONS **EVENT LOG** ATTACHMENTS (0) VENDOR ATTACHMENTS (0)

State History

Show 10 entries

Date	From	To	Status	Description	Subject
10/19/2021 12:01	opcmaximohelp@opc.com	jovanovic_biljana@yahoo.ca	AWARDED	Buyers organization awarded quote per lines ()	Awarde
10/19/2021 11:41	jovanovic_biljana@yahoo.ca	IT00121C@HAS_NO_EMAIL.GASOC.com	SENT	Vendor 87026 submitted quotations.	Bid Subr
10/19/2021 11:39	jovanovic_biljana@yahoo.ca	IT00121C@HAS_NO_EMAIL.GASOC.com	SENT	Vendor has applied for the RFQ.	RE: RFC
10/19/2021 11:21	opcmaximohelp@opc.com	jovanovic_biljana@yahoo.ca	SENT	Buyer send RFQ to Vendors.	New RFC

Showing 1 to 4 of 4 entries

Event Log record

Message

To: jovanovic_biljana@yahoo.ca

From: opcmaximohelp@opc.com

Subject: Awarded Quotation Lines

Message

Dear INGERSOLL-RAND COMPANY,
We inform you that we accepted your quotations on the RFQ #RFQ1058

Show 10 entries

Id	Name	Description	Type	Synced?	Actions
No data available in table					

Showing 0 to 0 of 0 entries

CANCEL

Awarded RFQs – Winning Vendors

The Order Hub - Development
Welcome, MATT WILEMON 87026.Admin

REQUEST FOR QUOTATION

RFQ #: RFQ1058 ← BACK
REPORT A TECHNICAL ISSUE

DETAILS | TERMS & CONDITIONS | EVENT LOG | ATTACHMENTS (0) | VENDOR ATTACHMENTS (0)

Buyer Information

Name: Oglethorpe Power
Address: OPC, OPC,WI, 5461211
E-mail: IT00121C@HAS_NO_EMAIL.GASOC.com
Contact name: Biljana Jovanovic
Phone:

EXPIRED

Status & Dates

Publish Date: 10/19/2021 11:18 | Close Date: 10/29/2021 00:00 | **Status: SELECTED**

Pre-Bid Meeting Date/Time: | Pre-Bid Meeting Location:

Confirmed/Rejected Date: 10/19/2021 11:39 | Confirmed/Rejected Comment: Confirmed.

Quote Submitted Date: 10/19/2021 11:41 | Quote Must be valid until: 10/30/2021

The lines below in Blue have been awarded to your company.

General Terms

This is a RFQ for a one time purchase

Payment Terms: | Freight Terms:

Ship Via: | Fob Point:

Currency: USD

Quote #: Q#12345 | Quote Valid Until: 10/28/2021

Description: Demo requisition

RFQ Lines Awarded Lines

Show 10 entries

Line number	Item	Description	Manufacturer	Model #	Quantity	UOM	Vendor Price	Not bidding on line	Actions
1	64341	CAMERA, MICRO DOME, PANASONIC P/N: WV-S3531L	108028	WV-S3531L	2	EACH	60.0000	No	
Vendor:		CAMERA, MICRO DOME, PANASONIC P/N: WV-S3531L							
2	64667	FACE COVERING, LARGE, SHEMA 97, PANDEMIC SUPPLY, FOR USE AT GENERATING FACILITIES ONLY	MANF12	Model10	10	EACH	18.0000	No	
Vendor:	C123	FACE COVERING, LARGE, SHEMA 97, PANDEMIC SUPPLY, FOR USE AT GENERATING FACILITIES ONLY							
3		SOME MATERIAL DESCRIPTION			50	EACH	2.0000	No	
Vendor:		SOME MATERIAL DESCRIPTION							
4		MATERIAL DESCRIPTION 2			100	EACH	3.0000	No	
Vendor:		MATERIAL DESCRIPTION 2							

Showing 1 to 4 of 4 entries

Awarded RFQs – Regret Vendors

The Order Hub - Development
Welcome, MATT WILEMON 87026.Admin

REQUEST FOR QUOTATION

RFQ #: RFQ1260

← BACK
REPORT A TECHNICAL ISSUE

DETAILS TERMS & CONDITIONS EVENT LOG ATTACHMENTS (1) VENDOR ATTACHMENTS (0)

Buyer Information



Name
Oglethorpe Power

Address: OPC, OPC, WI, 5461211
E-mail: opcmaximohelp@opc.com
Contact name: Ricardia Brutus
Phone: 1770-270-7058

EXPIRED

Status & Dates

Publish Date 12/06/2021 18:59	Close Date 12/13/2021 18:58	Status REGRET
Pre-Bid Meeting Date/Time 	Pre-Bid Meeting Location 	
Confirmed/Rejected Date 12/07/2021 07:44	Confirmed/Rejected Comment Reason for decline	
Quote Submitted Date 	Quote Must be valid until 12/31/2021	

Regrets. No lines have been awarded to your company.

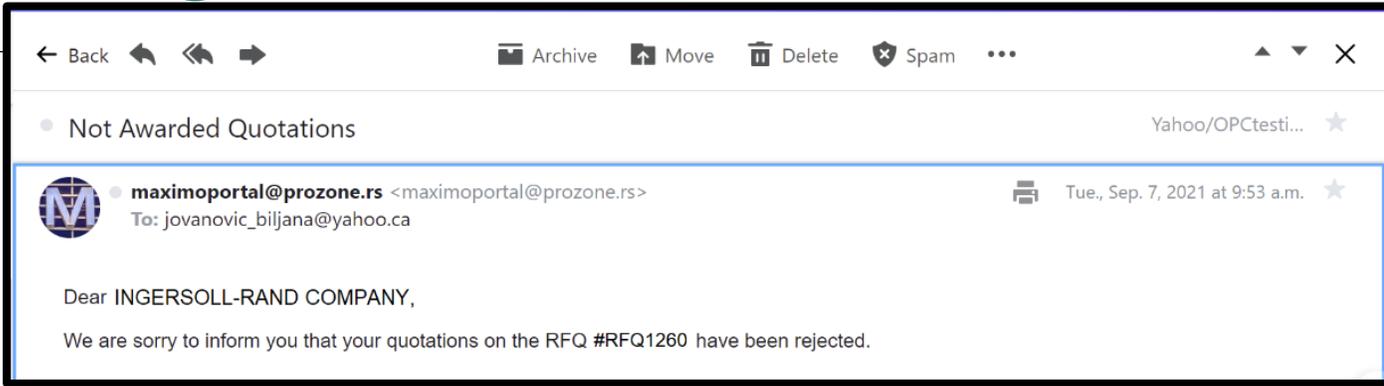
General Terms

This is a RFQ to set up a Contract with you, for the specified anticipated quantities, over the period 12/20/2021 to 12/31/2021

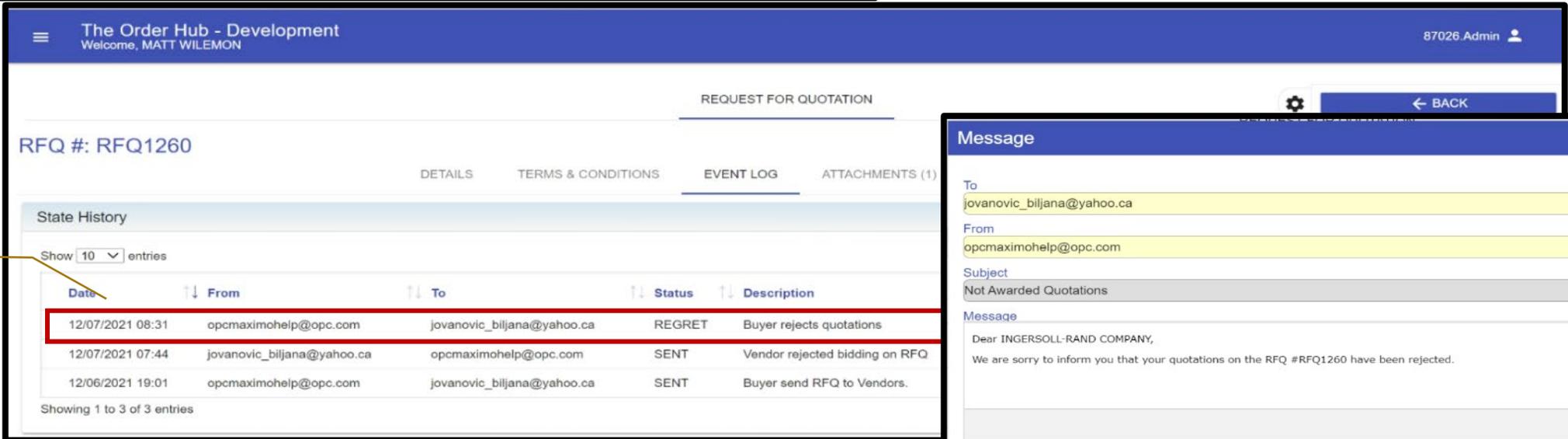
Payment Terms 	Freight Terms
Ship Via 	Fob Point
Currency USD	
Quote # 	Quote Valid Until
Description Order hub test spec char	

REGRET message and RFQ status change to REGRET

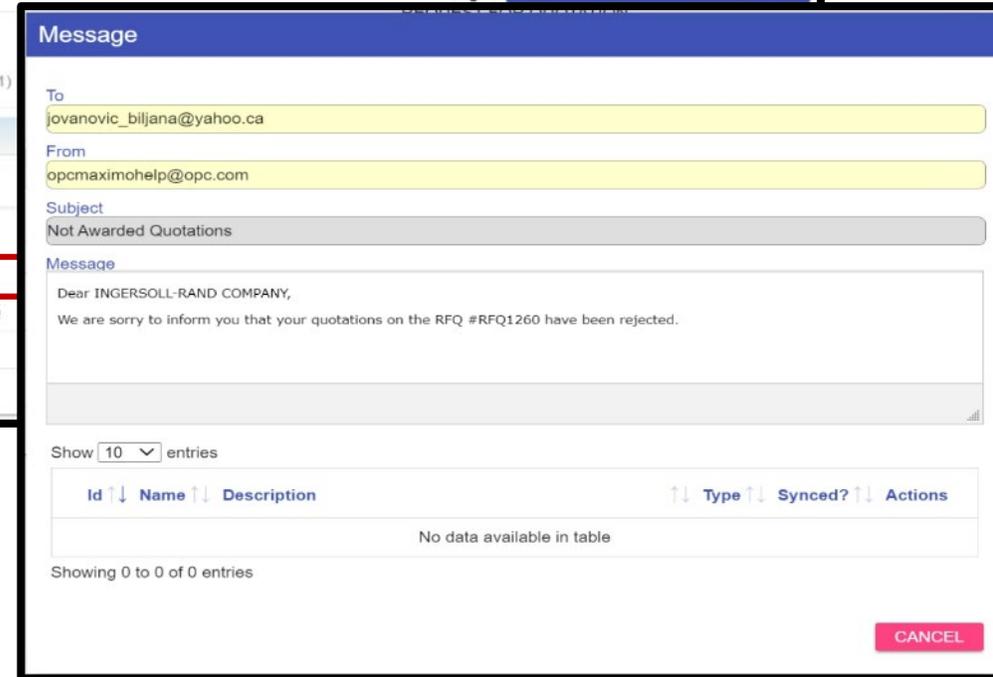
Regret Notification



E-mail notification



Event Log record

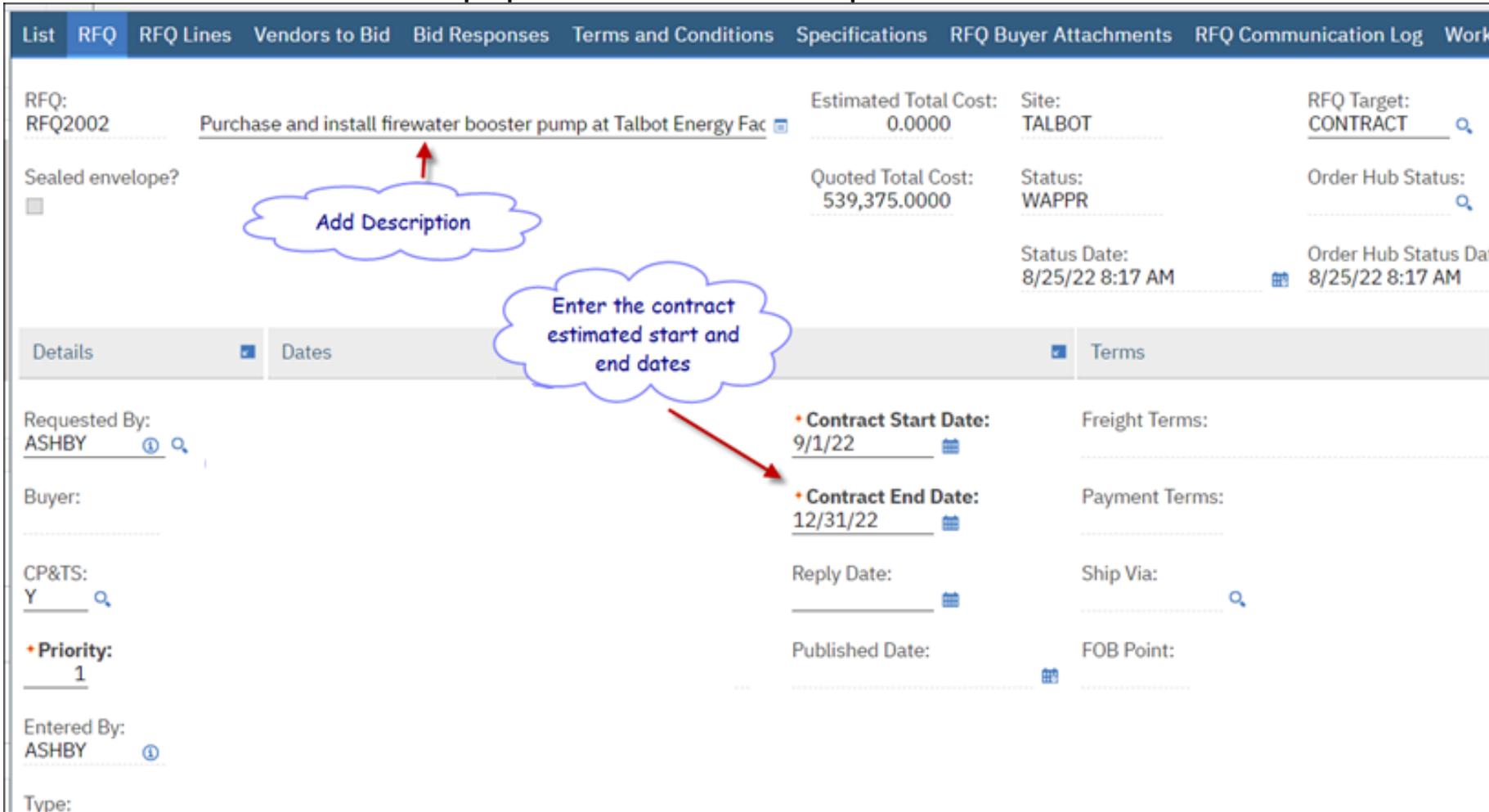


RFQ for Services Contracts

Sample RFQ: Contracts

The User (Not Supply Chain) creates an RFQ

Most of the fields will auto-populate or are not required but there are a few that need to be completed



The screenshot shows an RFQ system interface with the following fields and annotations:

- RFQ:** RFQ2002
- Description:** Purchase and install firewater booster pump at Talbot Energy Fac (Annotated with a cloud: "Add Description" and an arrow pointing to the text)
- Estimated Total Cost:** 0.0000
- Site:** TALBOT
- RFQ Target:** CONTRACT
- Sealed envelope?:**
- Quoted Total Cost:** 539,375.0000
- Status:** WAPPR
- Status Date:** 8/25/22 8:17 AM
- Order Hub Status:** (with search icon)
- Order Hub Status Date:** 8/25/22 8:17 AM
- Details:** **Dates:** **Terms:**
- Requested By:** ASHBY (with search icon)
- Buyer:** (empty)
- CP&TS:** Y (with search icon)
- Priority:** 1
- Entered By:** ASHBY (with search icon)
- Type:** (empty)
- Contract Start Date:** 9/1/22 (Annotated with a cloud: "Enter the contract estimated start and end dates" and an arrow pointing to the date)
- Contract End Date:** 12/31/22 (Annotated with a cloud: "Enter the contract estimated start and end dates" and an arrow pointing to the date)
- Reply Date:** (empty)
- Published Date:** (empty)
- Freight Terms:** (empty)
- Payment Terms:** (empty)
- Ship Via:** (with search icon)
- FOB Point:** (empty)

Sample RFQ: Contracts

Next move to the “RFQ Lines” tab and enter the line details. This is “almost” the same as creating a task release line. Additional lines can be added as needed.

The screenshot shows the 'RFQ Lines' tab in a software application. At the top, there are navigation tabs: List, RFQ, RFQ Lines (selected), Vendors to Bid, Bid Responses, Terms and Conditions, Specifications, RFQ Buyer Attachments, RFQ Communication Log, and Work Log.

Below the navigation, there is a summary section for the RFQ: RFQ2076, 'Install replacement transformers'. It includes fields for Estimated Total Cost (23,912.0000), Quoted Total Cost (0.0000), Site (TASMITH), Status (WAPPR), RFQ Target (CONTRACT), and Order Hub (ST).

The main area displays a table of RFQ Lines. The first line is selected, showing details for 'TRANSFORMER REMOVAL, INSTALLATI...'. The table columns include Line, Item, Description, Storeroom, Quantity, Order Unit, Conversion Factor, Work Order, Est. Unit Cost, and Est. Line Cost.

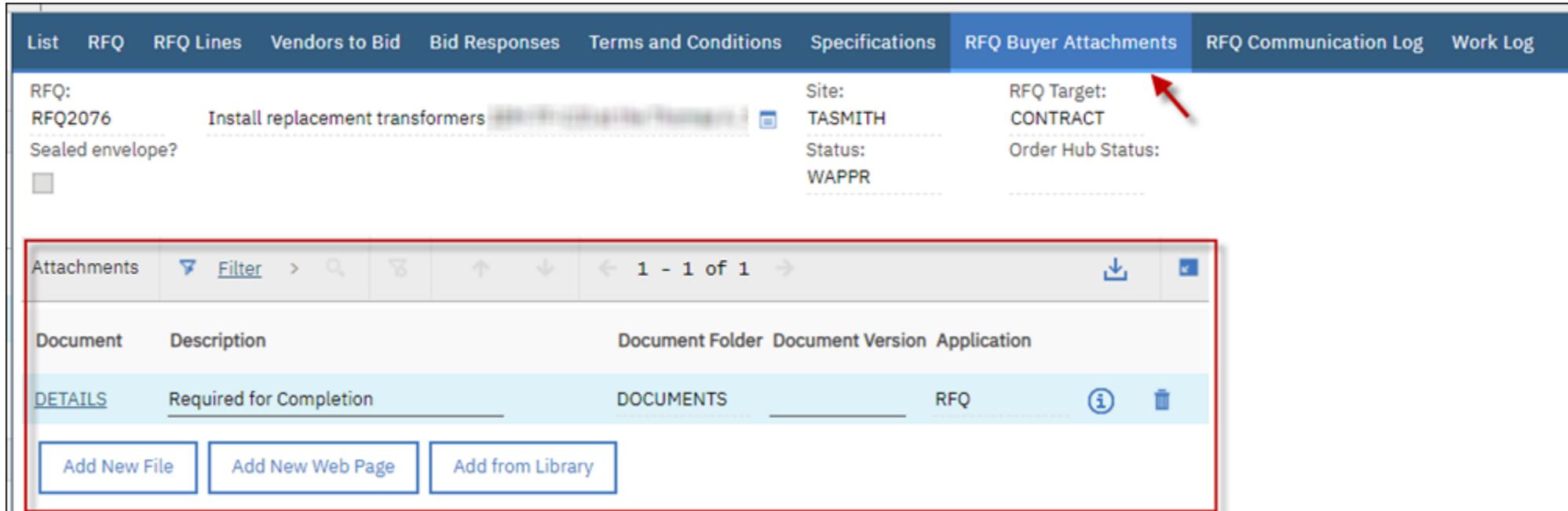
Below the table, the 'Line Item' details are visible. Annotations with arrows point to specific fields:

- Open the line details:** Points to the dropdown arrow next to line 1.
- Add a Line Description:** Points to the description field containing 'TRANSFORMER REMOVAL, INSTALLATION, AND TESTING'.
- Enter the quantity (generally this is 1) and order unit (EA):** Points to the 'Quantity' field (1.0000) and 'Order Unit' field (EA).
- Enter the Estimated Unit Cost (the estimated line cost will calculate automatically):** Points to the 'Estimated Unit Cost' field (23,912.0000).

On the right side, there are fields for Manufacturer, Model, Category, Commodity Group, Commodity Code, Classification, and Class Description. A yellow box at the bottom right contains the text: 'The line details will be added to the Task Release at the end of the process.'

Sample RFQ: Contracts

Attachments can be added on the “RFQ Buyer Attachments” tab

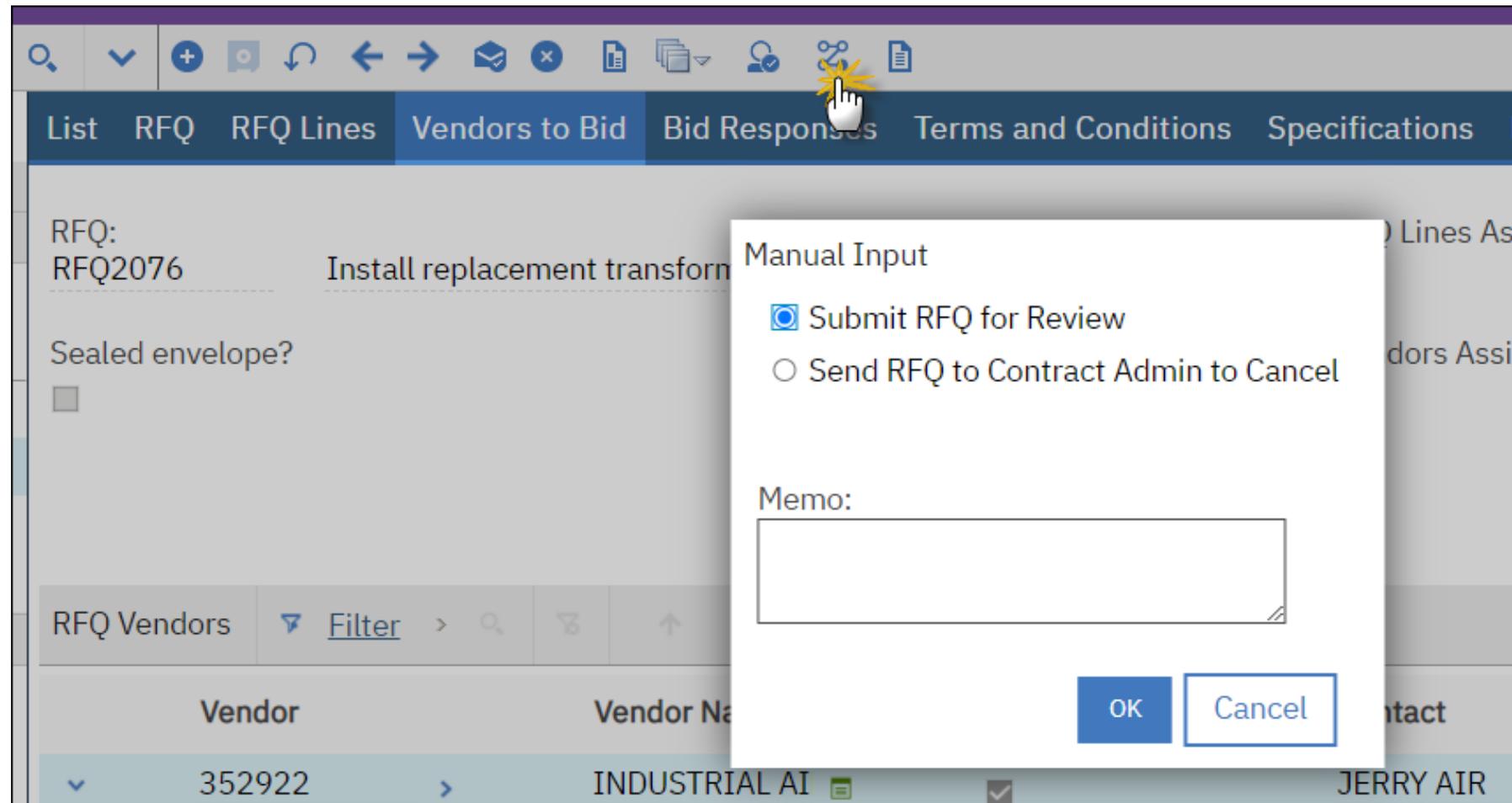


The screenshot shows the 'RFQ Buyer Attachments' tab selected in a software interface. The top navigation bar includes tabs for 'List', 'RFQ', 'RFQ Lines', 'Vendors to Bid', 'Bid Responses', 'Terms and Conditions', 'Specifications', 'RFQ Buyer Attachments', 'RFQ Communication Log', and 'Work Log'. The main content area displays RFQ details: RFQ: RFQ2076, Site: TASMITH, Status: WAPPR, RFQ Target: CONTRACT, and Order Hub Status. A red arrow points to the 'RFQ Buyer Attachments' tab. Below the details is a table with one attachment: 'Required for Completion' with document folder 'DOCUMENTS' and application 'RFQ'. The table has columns for 'Document', 'Description', 'Document Folder', 'Document Version', and 'Application'. Below the table are three buttons: 'Add New File', 'Add New Web Page', and 'Add from Library'.

These attachments are sent to all vendors on the RFQ when the RFQ is sent to the vendors

Sample RFQ: Contracts

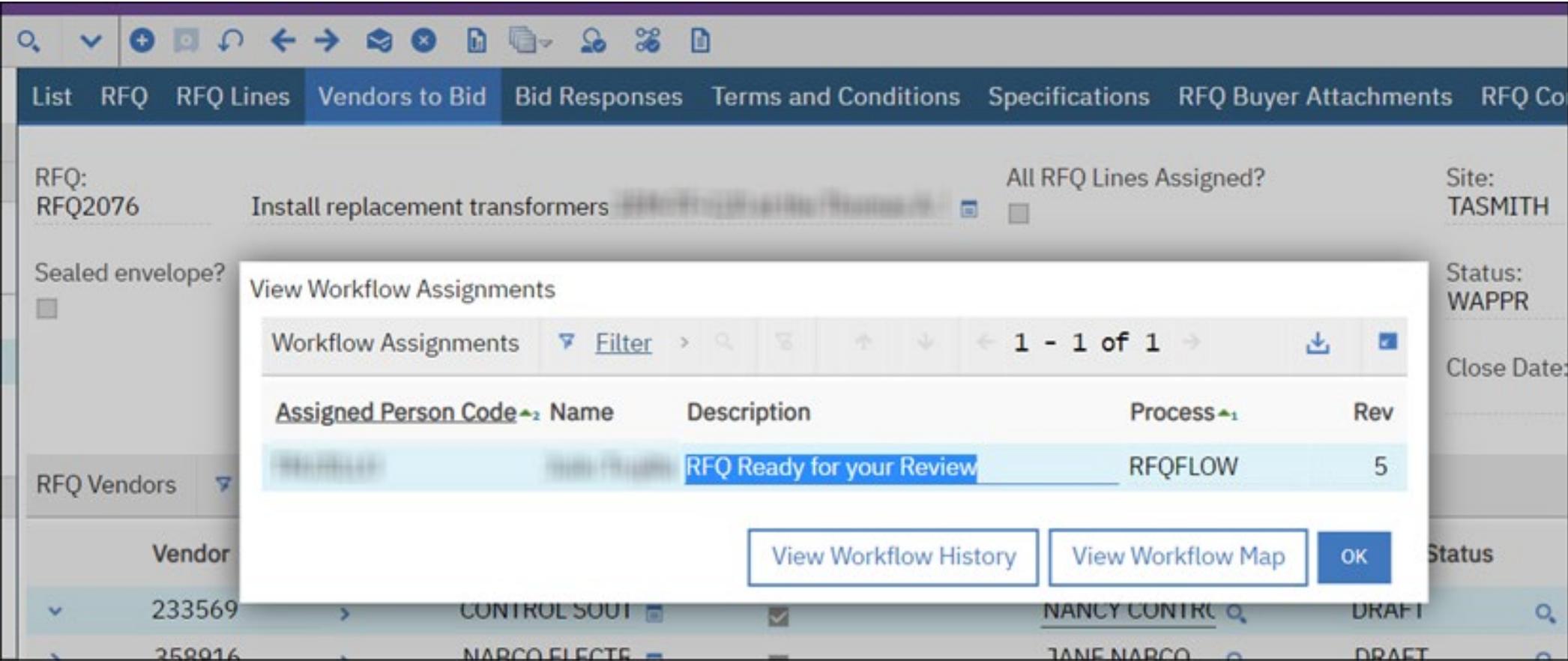
Once vendors are added, click the Route Workflow icon to submit the RFQ



The screenshot displays a software interface for managing an RFQ. The main window has a dark blue header with tabs: List, RFQ, RFQ Lines, Vendors to Bid, Bid Responses, Terms and Conditions, Specifications, and R. The 'Vendors to Bid' tab is active. Below the header, the RFQ details are shown: RFQ: RFQ2076, Install replacement transform, and a 'Sealed envelope?' checkbox which is unchecked. A 'Manual Input' dialog box is overlaid on the interface, containing two radio button options: 'Submit RFQ for Review' (which is selected) and 'Send RFQ to Contract Admin to Cancel'. Below these options is a text area labeled 'Memo:'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. In the background, a table of 'RFQ Vendors' is visible with columns for 'Vendor' and 'Vendor Name'. One vendor is listed: 352922, INDUSTRIAL AI, JERRY AIR.

Sample RFQ: Contracts

RFQ is sent to Requestor's Supervisor for review and approval to send to Contract Agents



RFQ: RFQ2076 Install replacement transformers All RFQ Lines Assigned? Site: TASMITH

Sealed envelope? Status: WAPPR

Close Dates:

RFQ Vendors

Assigned Person Code	Name	Description	Process	Rev
	NANCY CONTR	RFQ Ready for your Review	RFQFLOW	5

Buttons: View Workflow History, View Workflow Map, OK

Vendor List:

Vendor	Name	Status
233569	CONTROL SOUT	DRAFT
258916	MARCO ELECTE	DRAFT

Sample RFQ: Contracts

The Contract Administrators complete the following steps:

- Adds the **Close Date** and **Quotes Valid Until date** and any pre-bid meeting information

List	RFQ	RFQ Lines	Vendors to Bid	Bid Responses	Terms and Conditions	Specifications	RFQ Buyer Attachments	RFQ Communication Log	Work Log
RFQ:	RFQ2002	Smarr Painting Unit 2 - 2022		Estimated Total Cost:	250,000.0000	Site:	SMARR	RFQ Target:	CONTRACT
Sealed envelope?	<input checked="" type="checkbox"/>		Quoted Total Cost:	0.0000	Status:	SENT	Order Hub Status:	SENT	
				Status Date:	9/1/22 12:11 PM	Order Hub Status Date:	9/1/22 12:11 PM		
Details		Dates			Terms				
Requested By:	SAKACH	Close Date:	9/22/22 5:00 PM	Contract Start Date:	10/17/22	Freight Terms:			
Buyer:	BRUTUS	Quote Must be Valid Until:	12/31/22	Contract End Date:	12/31/22	Payment Terms:			
CP&TS:	N	Pre-Bid Meeting Date:	9/14/22 9:00 AM	Reply Date:		Ship Via:			
Priority:	0	Pre-Bid Meeting Location:	Smarr Energy Facility – 1077 Rumble Road Forsyth G/	Published Date:	9/1/22 12:11 PM	FOB Point:			
Entered By:	SAKACH								
Type:	Service Quote								

Sample RFQ: Contracts

- ▶ Add/adjust vendors and assign RFQ lines to each vendor.
 - RFQ status **INPRG**
 - Vendor Quote status **DRAFT**

List RFQ RFQ Lines Vendors to Bid Bid Responses Terms and Conditions Specifications RFQ Buyer Attachments RFQ Communication Log Work Log

RFQ: RFQ2181 All RFQ Lines Assigned? Site: TALBOT RFQ Target: CONTRACT

Sealed envelope? All Vendors Assigned? Status: INPRG Order Hub Status:

RFQ In Progress View Unassigned Lines Send to Vendors Close Date:

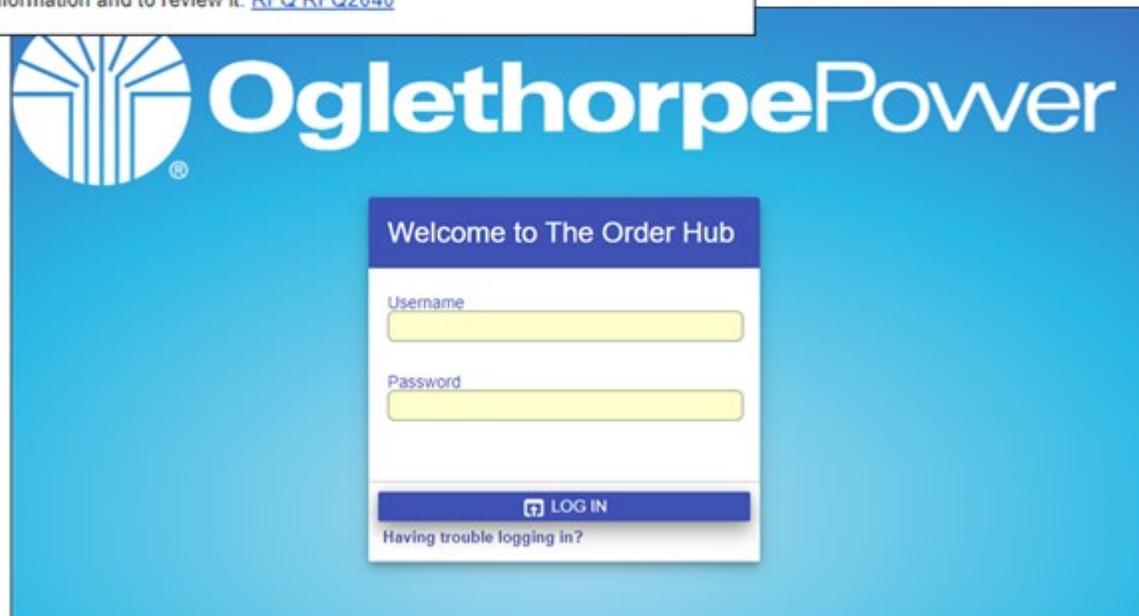
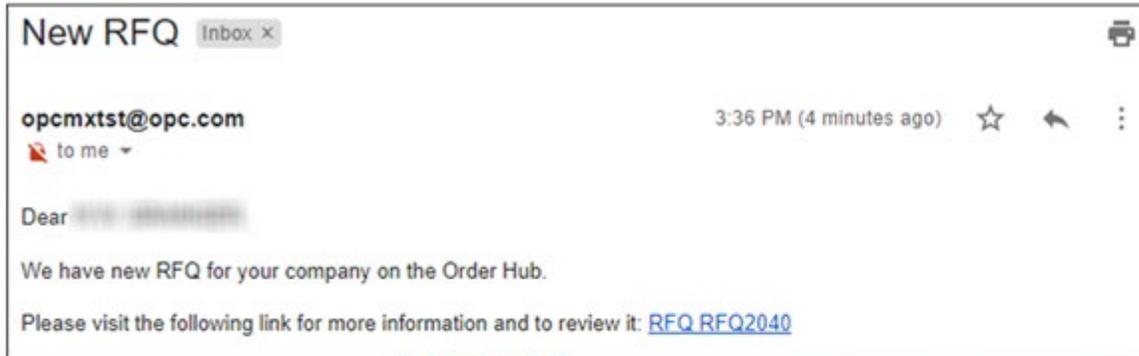
RFQ Vendors Filter 1 - 2 of 2

Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date	Lines Count
> 358916	> HANSEN ELECTRIC	<input checked="" type="checkbox"/>	JANE HANSEN	DRAFT	4/15/22 3:17 PM	0
> 359334	> MILLER ELECTRIC	<input checked="" type="checkbox"/>	JOHN MILLER	DRAFT	4/15/22 3:17 PM	0

Select Vendors Add Vendor Select Commodity Vendors

Vendor Order Hub Screens

Each vendor's contact on the RFQ will be notified by Email.
They use the Order Hub to process the quote.



Sample RFQ: Contracts

Contract Agent sends RFQ back to the Requestor to review bids
 RFQ Status **BIDSELECT**

The screenshot displays the 'Bid Responses' section of an RFQ system. The RFQ is titled 'RFQ2076' and is for 'Install replacement transformers'. The status is 'BIDSELECT'. The interface shows a table of bids from four vendors. Vendor 1 has the lowest bid at 26,000.0000. Vendor 3 has a bid of 23,000.0000 but is marked as 'Declined to Bid'. Vendor 2 has a bid of 35,292.22. Vendor 4 has no bid information.

Line	Item	Not Awarding?	Vendor 1	Unit Cost	Awarded?	Vendor 2	Unit Cost	Awarded?	Vendor 3	Unit Cost	Awarded?	Vendor 4	Unit Cost
1	TRANSFORMER REMOVAL, INSTALLATION, AND TESTING; VALVES		Vendor 1	26,000.0000		Vendor 2	23,000.0000		Vendor 3	35,292.22		Vendor 4	

Annotations in the image include:

- Comparative Selection sub-tab**: Points to the 'Comparative Selection' tab in the navigation bar.
- Status BidSelect**: Points to the 'Status: BIDSELECT' field.
- Requester reviews all submitted bids on the "Comparative Selection" tab**: A large cloud annotation pointing to the bid table.
- Lowest bid for the line**: Points to the 'Low Bid Unit Cost: 23,000.0000' field.
- No bid information because they declined to bid**: Points to the 'Supplier Remarks' field for Vendor 3.

Sample RFQ: Contracts

- ▶ Picks winning Bid and Enters Bid exception information

<p>Description: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING</p> <p>Commodity Group: VALVES</p> <p>Manufacturer:</p> <p>Model:</p> <p>Required Date:</p> <p>Quantity: 1.0000</p> <p>Order Unit: EA</p> <p>Low Bid Unit Cost: 23,000.0000</p> <p>Not Awarding Line? <input type="checkbox"/></p>	<p>Description: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING</p> <p>Catalog #:</p> <p>Manufacturer:</p> <p>Model:</p> <p>Delivery Date: 4/1/22</p> <p>Quantity: 1.0000</p> <p>UOM: EA</p> <p>Unit Cost: 26,000.0000</p> <p>Supplier Remarks:</p> <p>Asked to Bid? <input checked="" type="checkbox"/></p> <p>Declined to Bid? <input type="checkbox"/></p> <p>Awarded? <input checked="" type="checkbox"/></p> <p>Bid and/or Quote:</p> <p>Bid/Quote Exception or Explanation:</p>	<p>Description: TRANSFORMER REMOVAL, INSTALLATION, AND TESTING</p> <p>Catalog #:</p> <p>Manufacturer:</p> <p>Model:</p> <p>Delivery Date: 4/1/22</p> <p>Quantity: 1.0000</p> <p>UOM: EA</p> <p>Unit Cost: 23,000.0000</p> <p>Supplier Remarks:</p> <p>Asked to Bid? <input checked="" type="checkbox"/></p> <p>Declined to Bid? <input type="checkbox"/></p> <p>Awarded? <input type="checkbox"/></p> <p>Bid and/or Quote:</p> <p>Bid/Quote Exception or Explanation:</p>
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Check the Awarded flag to accept the bid

Enter bid exception information

Sample RFQ: Contracts

Request for Quote Details Report										
RFQ1422: Batteries Replacement at the Effingham Energy Facility										
Site: EFFINGHA			Required Date:			Est. Total Cost: \$679,163.00				
Requested By: Matt Luchner			Requested Date: 4/12/22							
Status: QUOTAPPR			Sealed Bid: Yes							
RFQ Line Details										
Line	Description	Quantity	Order Unit	Est. Unit Cost	Est. Line Cost					
1	12V BATTERIES	1	DOLLAR	\$240,464.00	\$240,464.00					
2	12V BATTERIES	1	DOLLAR	\$156,008.00	\$156,008.00					
3	12V BATTERIES	1	DOLLAR	\$156,008.00	\$156,008.00					
4	12V BATTERIES	1	DOLLAR	\$126,683.00	\$126,683.00					
				Total	\$679,163.00					
Vendor Name										
				Status	Total Bid					
				Regret	\$690,883.00					
				Regret	\$0.00					
				Quotation Lines Selected	\$445,925.00					
Bid Line Details										
Line # 1: null										
Name	Unit Cost	Delivery Date	Supplier Remarks	Declined to Bid?	Low Bid	Proposed Awarded Bid	Bid and/or Quote	Bid/Quote Exception	Quote Total Cost	
	\$0.00								\$0.00	
	\$223,935.00	10/7/22		No					\$223,935.00	
	\$175,583.00	10/21/22	\$207,607.00 - includes eagle eye - equip-install-comm. Note in body of quote additional charge required if you need 750 MCM Battery cables the estimated 85 feet to the panel	No	Yes	Yes	LOWBID		\$175,583.00	
Line # 2: null										
Name	Unit Cost	Delivery Date	Supplier Remarks	Declined to Bid?	Low Bid	Proposed Awarded Bid	Bid and/or Quote	Bid/Quote Exception	Quote Total Cost	
	\$0.00								\$0.00	

Sample RFQ: Contracts

- ▶ Use the “Create Task Release” button from Bid Response tab to award to vendor. The Autonumber button is used to generate the contract number.

RFQ: RFQ2076 Install replacement transformers

Site: TASMITH
Status: FINALIZED
Close Date: 2/25/22 12:00 AM

* Sequence	Vendor	Vendor Name	Order Hub Vendor?	Contact	Quote Status	Status Date
1	233569		☑	NANCY CONTR	SELECTED	2/16/22 3:53 PM
2	352922		☑	JERRY AIR	REGRET	2/16/22 3:53 PM
3	358916		☑			2/16/22 3:53 PM

Vendor Details: Master Contract: C1765

Create Contract dialog box:
Contract: C9608 Install replacement transformers 2EM-TF-C/D at the Thomas A. I
Contract Type: Task Release

Issues Experienced

- Vendor quantity entered quote was not updating Maximo PR required quantity.
- Interface failures between Maximo and Order Hub due to different line description field length
- Integration password change was preventing retrieval of quotations for a sealed bid RFQ
- RFQ's on Order Hub mixing up data if vendor had two browser sessions open
- Comm logs sent from Maximo were not visible on the Order Hub for admin access
- Maximo sending RFQ data to the Order Hub when PO or contract is canceled and RFQ is reopened causing integration errors
- Order Hub RFQ vendor attachments missing in Maximo due to vendor attachment that had an “invalid” character in the file name.
- Temporarily unable to add Multiple Attachments at one time on Maximo RFQ
- Site ID is changing when creating a purchase contract revision

Opportunities

- **Get more Vendors onto Order Hub**
 - **OPC Requirement: If bidding, MUST BE ON HUB**
- **Lower Bid Requirement Threshold for OPC**
 - **When bids are required (>\$50K), 100% usage by Contract Agent**
 - **When bids are required (>\$10k), not all buyers utilizing Order Hub**
- **Use Order Hub to secure a quote, not just to competitively bid.**
 - **Old habits are HARD TO BREAK!!**
- **Investigate expanded Order Hub functionality**



If More Info Needed

- **Contact Information**

- **Cristy Bennett (General Info)**
- **Norris Minnis (Contracts)**
- **Fred Quartermaine (Materials)**
- **Tyler Lyon (IT Maximo Supv)**

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