



Los Angeles Unified School District

Maximo 7.5 / Work Order Module

(Service Call) Stock Material Requisition Guide

DRAFT



DEFINITION

The (Service Call) Stock Material Requisition guide is designed for material requisitions against a local M&O Storeroom inventory against Service Call work orders. The guide details step by step instructions on how to reserve M&O Storeroom inventory in the Work Order Tracking application.

1. LOGIN

The requestor performs this function.

To login to Maximo 7.5, please go to <http://awms.lausd.net/awms>.

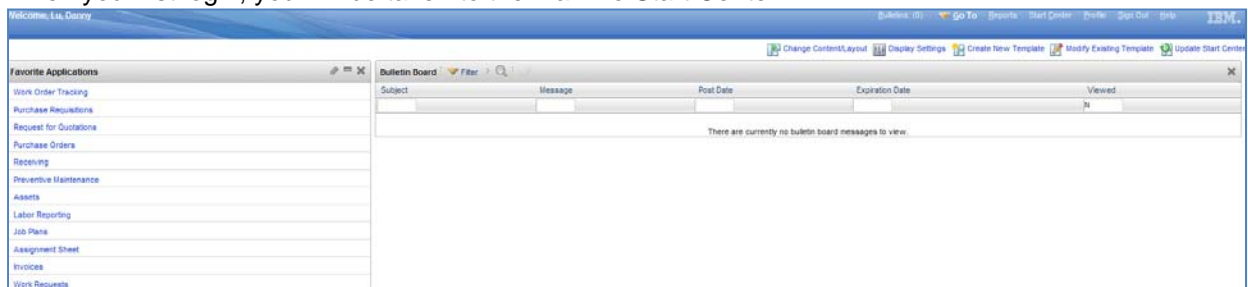
Enter your **Single sign-on** username and password and click on the **Sign In** button.



The login screen features the Tivoli software and IBM logos at the top. The main heading is "Welcome to Maximo". On the left is a large 3D nut icon. To the right of the icon are two input fields: "User Name:" with the text "danny.lu" and "Password:" with masked characters. Below these fields is a "Sign In" button. At the bottom right, there are links for "Forgot Password?" and "New User? Register Now". The footer contains the copyright notice: "© Copyright IBM Corp. 2007-2012. All rights reserved. See product license for details."

START CENTER

When you first login, you will be taken to the Maximo Start Center.

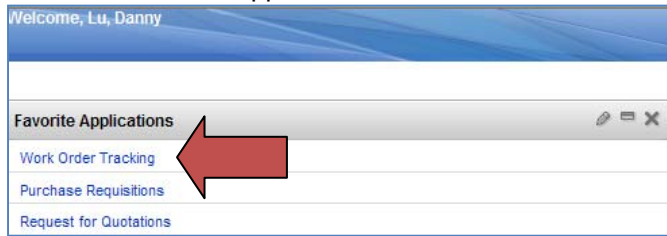


The Start Center dashboard includes a "Welcome, Eln, Danny" header and a navigation bar with links like "Go To", "Reports", "Start Center", "Profile", "Sign Out", and "Help". A "Bulletin Board" section is visible, showing a table with columns for Subject, Message, Post Date, Expiration Date, and Viewed. The table is currently empty, with a message stating "There are currently no bulletin board messages to view." On the left side, there is a "Favorite Applications" list containing links to various Maximo modules such as Work Order Tracking, Purchase Requisitions, Request for Quotations, Purchase Orders, Receiving, Preventive Maintenance, Assets, Labor Reporting, Job Plans, Assignment Sheet, Invoices, and Work Requests.



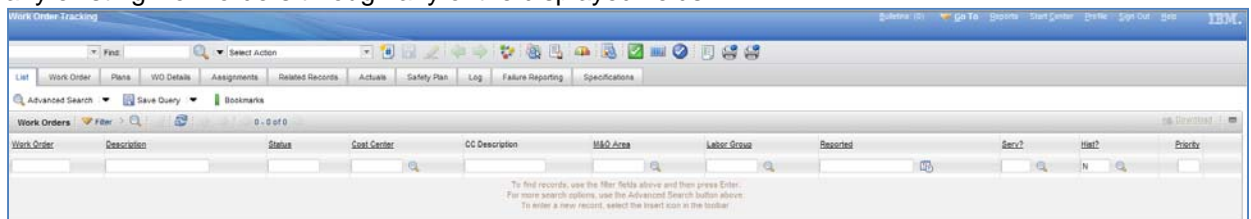
WORK ORDER TRACKING

Under the Favorite Applications section, click on the **Work Order Tracking** application.




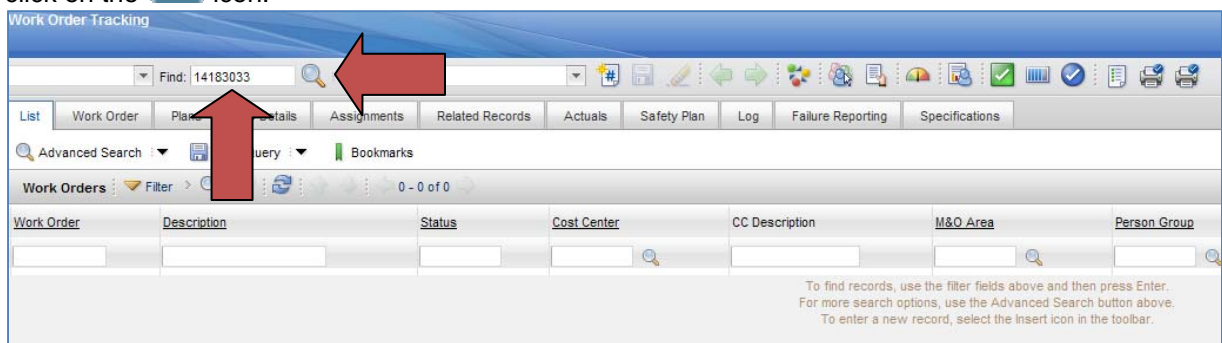
WORK ORDER TRACKING HOME


You will then be taken to the Work Order Tracking home screen; in this screen, you may search for any existing work orders through any of the displayed fields.

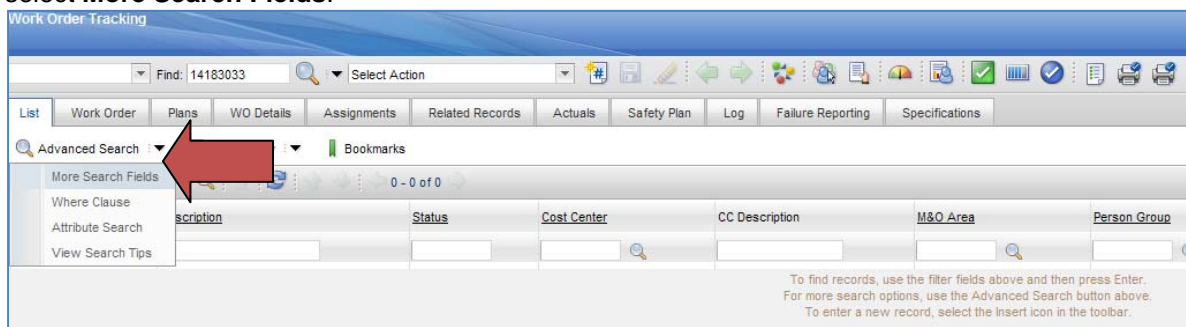


2. GO TO WORK ORDER

If you know your work order number, you can type in the work order number in the **Find:** field and click on the  icon.



If you do not know your work order number, you can search for the work order through any of the fields in the home search screen or you may click on the **Advanced Search** dropdown  and select **More Search Fields**.





If you selected the **More Search Fields** option, a new **More Search Fields | Current Query** window appears. You may search by any of the fields in this page to locate the work order.

3. WORK ORDER IDENTIFIED, GO TO PLANS TAB TO ADD MATERIALS

Once you have identified your work order, click on the **Plans** tab.

In the **Plans** tab, click on the **Materials** tab on the bottom section.



Click on the **New Row** button.

The screenshot shows the 'Materials' tab selected. At the bottom right, there are three buttons: 'Select Materials', 'Select Asset Spare Parts', and 'New Row'. A red arrow points to the 'New Row' button.

Fill out the following fields


Enter **MA** for in the **Material Category** field.

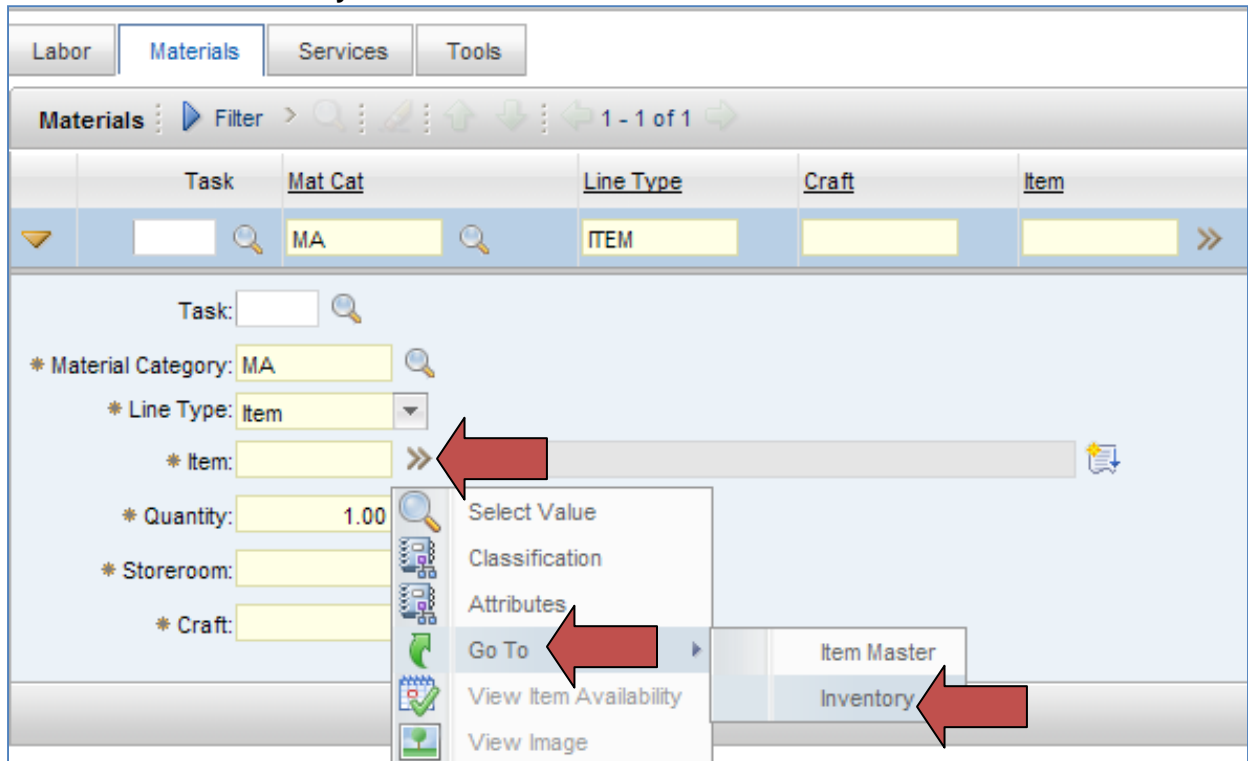
The screenshot shows the 'Materials' tab. The 'Task' field is empty. The 'Mat Cat' field contains 'MA'. The 'Line Type' field contains 'ITEM'. The 'Craft' and 'Item' fields are empty. Below the table, the 'Task' field is empty, and the '* Material Category' field contains 'MA'. A red arrow points to the 'MA' in the '* Material Category' field.

The **Line Type** defaults to **Item**. Leave this value as is.

The screenshot shows the 'Materials' tab. The 'Task' field is empty. The 'Mat Cat' field contains 'MA'. The 'Line Type' field contains 'ITEM'. The 'Craft' and 'Item' fields are empty. Below the table, the 'Task' field is empty, the '* Material Category' field contains 'MA', and the '* Line Type' field contains 'Item'. A red arrow points to the 'Item' in the '* Line Type' field.

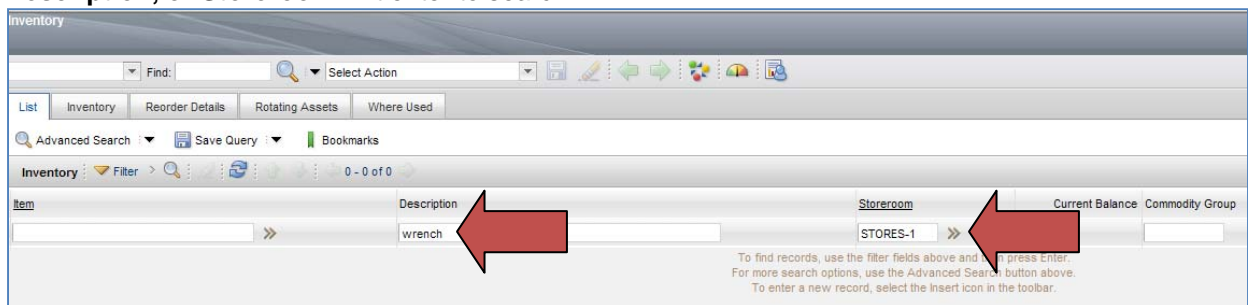


Enter the **inventory Item number** in the **Item** field. If you do not know the item number, you may search for it by clicking on the  icon to the right of the Item field. Hover your mouse over the **Go To** field and select **Inventory**.



The screenshot shows the 'Materials' form in Maximo. At the top, there are tabs for 'Labor', 'Materials', 'Services', and 'Tools'. Below these is a 'Materials' section with a 'Filter' button and a search bar. The main form has fields for 'Task', 'Mat Cat' (set to 'MA'), 'Line Type' (set to 'ITEM'), 'Craft', and 'Item'. A red arrow points to the 'Item' field's 'Go To' icon. Another red arrow points to the 'Go To' dropdown menu, which is open and shows options: 'Select Value', 'Classification', 'Attributes', 'Go To', 'View Item Availability', and 'View Image'. A third red arrow points to the 'Inventory' option in the 'Go To' dropdown. A fourth red arrow points to the 'Item Master' and 'Inventory' buttons on the right side of the form.

You will be taken to the **Inventory** application where you can search for by **Item Number**, **Description**, or **Storeroom**. Hit enter to search.



The screenshot shows the 'Inventory' application in Maximo. At the top, there is a 'Find' field and a 'Select Action' dropdown. Below these are tabs for 'List', 'Inventory', 'Reorder Details', 'Rotating Assets', and 'Where Used'. The 'Inventory' tab is selected. The main form has fields for 'Item', 'Description' (set to 'wrench'), 'Storeroom' (set to 'STORES-1'), 'Current Balance', and 'Commodity Group'. A red arrow points to the 'Item' field's 'Go To' icon. Another red arrow points to the 'Storeroom' field's 'Go To' icon. A third red arrow points to the 'Inventory' button on the right side of the form.



The search will return a set of results. Click on the item number you are interested in.

Item	Description	Storeroom	Current Balance	Commodity Group
	wrench	STORES-1		
3408400314	WRENCH FOR SPRINKLER HEADS W- TYPE 9	STORES-10	7.00	34000
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-1	5.00	44500
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-10	84.00	44500
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-10S1	1,000.00	44500
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-1S1	1,000.00	44500

Review the **Current Balance/Availability** and click on the **Return With Value** to select this item.

Available Balance Summary		Other Balance Summary Information		ABC Analysis		Issue History	
Current Balance	7.00	Quantity Currently Reserved	0.00	ABC Type		Last Issue Date	
Hard Reserved Quantity Not Staged	0.00	Hard Reserved Quantity	0.00	Count Frequency		Year to Date	0.00
Hard Reserved Quantity Shipped	0.00	Soft Reserved Quantity	0.00			Last Year	0.00
Total Quantity Shipped	0.00	Quantity Staged	0.00			2 Years Ago	0.00
Expired Quantity in Stock	0.00	Quantity in Holding Location	0.00			3 Years Ago	0.00
Quantity Available	7.00						

The value will be returned back to your **Item** field in the **Materials** tab.

Materials						
Task	Mat Cat	Line Type	Craft	Item	Description	
	MA	ITEM		3408400314	WRENCH FOR SPRINKLER HEADS W- TYPE 9	
Task:						
* Material Category: MA						
* Line Type: Item						
* Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9						
* Quantity: 1.00						
* Storeroom: STORES-10						
* Craft:						
Direct Issue? <input type="checkbox"/>						
Order Unit:						
Indirect Rate: 1.000						
Burden Unit Cost: 10.00						
Burden Line Cost: 10.00						
Avg Cost: 10.00						

Enter the **Quantity** needed (auto-populates with 1)

Task:		Direct Issue? <input type="checkbox"/>	
* Material Category: MA		Order Unit:	
* Line Type: Item		Indirect Rate: 1.000	
* Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9		Burden Unit Cost: 10.00	
* Quantity: 1.00			




Confirm the **Storeroom** name. You may change the Storeroom value if you wish to order from a different M&O Storeroom. It is important to check the balance or quantity available in the chosen Storeroom, so as not to create a negative inventory balance.

The screenshot shows the 'Materials' tab in the Maximo interface. The 'Task' field is empty, 'Mat Cat' is 'MA', 'Line Type' is 'ITEM', and 'Craft' is empty. The 'Item' field is '3408400314' and the 'Description' is 'WRENCH FOR SPRINKLER HEADS W- TYPE 9'. The 'Quantity' is '1.00'. The 'Storeroom' field is 'STORES-10', highlighted with a red arrow. The 'Craft' field is empty. On the right, there are fields for 'Direct Issue?' (unchecked), 'Order Unit' (empty), 'Indirect Rate' (1.000), 'Burden Unit Cost' (10.00), 'Burden Line Cost' (10.00), and 'Avg Cost' (10.00).

Enter the **Craft** code that is requesting the material. For example, **AA** for Carpentry.

The screenshot shows the 'Materials' tab in the Maximo interface. The 'Task' field is empty, 'Mat Cat' is 'MA', 'Line Type' is 'ITEM', and 'Craft' is 'AA', highlighted with a red arrow. The 'Item' field is '3408400314' and the 'Description' is 'WRENCH FOR SPRINKLER HEADS W- TYPE 9'. The 'Quantity' is '1.00'. The 'Storeroom' field is 'STORES-10'. On the right, there are fields for 'Direct Issue?' (unchecked), 'Order Unit' (empty), 'Indirect Rate' (1.000), 'Burden Unit Cost' (10.00), 'Burden Line Cost' (10.00), and 'Avg Cost' (10.00).

Review your entry. You may order additional material by clicking on the **New Row** button or the  icon to save the record.

The screenshot shows the 'Work Order Tracking' screen. The 'Find' field is empty, and the 'Select Action' dropdown is set to 'New Row', highlighted with a red arrow. The 'List' tab is selected. The 'Work Order' field is '14183033' and the 'Description' is 'Falling ceiling tiles in Main building, classroom 1'. The 'Parent WO' field is empty, and the 'Status' is 'APPR'.

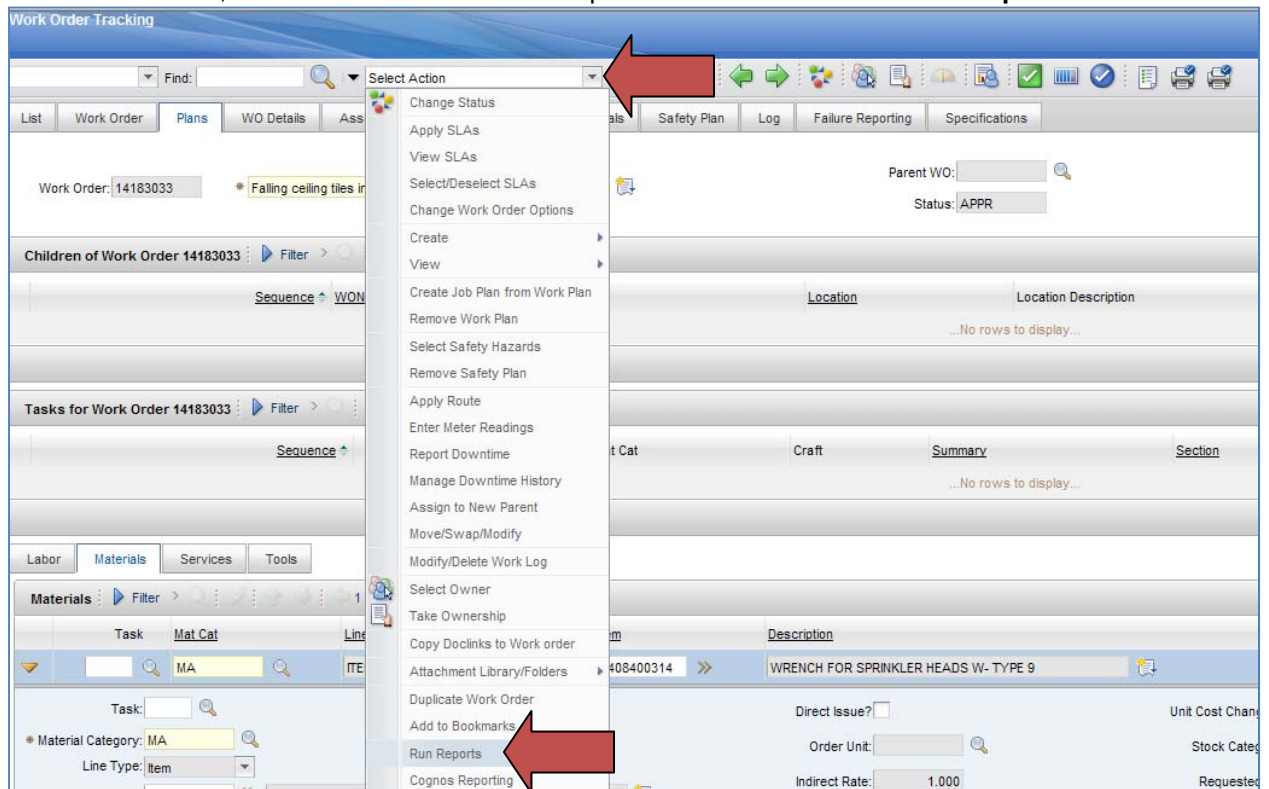
Note: If the work order status is **APPR** or above, the item is automatically reserved from the M&O Storeroom.




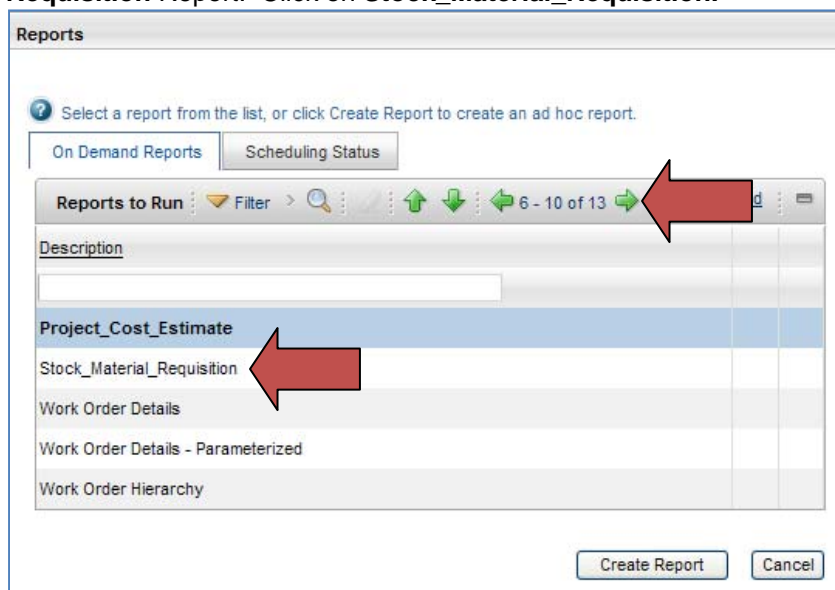
4. PRINT/SUBMIT STOCK MATERIAL REQUISITION REPORT TO HEAD STOCK CLERK

The requestor performs this function.

On the work order, click on the **Select Action** dropdown  icon and select **Run Reports**.



A **Reports** window will appear. Click on the next arrow  until you find the **Stock Material Requisition Report**. Click on **Stock_Material_Requisition**.





A **Request** Page will appear. Fill out the required fields and click on the **Submit** button.

Request Page

Help Text

Parameters

p_wonum: 14183033

Comment: Comments

AuthBy: 783916

reportToRun: Stock

MATLINECRAFT: AA

storerooms_sel: STORES-10

actMatTransDate:

IssuedTo: 783916

TaskIDs:

Schedule

☒ Immediate

☐ At this Time

☐ Recurring

Email


To:

Subject:

Comments:

Submit



A new **BIRT Report Viewer** window will appear. Review the report for accuracy and print the report by clicking on the printer  icon. The report will be exported into a PDF file where you can begin the print.

Reporting

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Los Angeles Unified School District

Existing Facilities Maintenance & Operations

STOCK MATERIAL REQUISITION

Parameters Entered: Storeroom: *STORES-10*

Actual material issues and returns with transaction date of:

Authorized By Labor Code: 783916 Printed By: danny.lu

Material Line Craft: AA Task IDs:

W.O. Number: *14183033*

Job Number:

School:

School Code:

Lead Craft Code:

Reserved Date: 5/23/13

Authorized By: (Please Print)
Lu, Danny
783916

Area/Region: M&O CENTRAL

Issued To: Lu, Danny
783916

Report Date and Time: May 23, 2013 1:52 PM

Comments:
Comments or instructions here

FUND	AREA	ORG/SUB	PROG	OBJ	JOB #

Task ID	Plan Matl Craft	Cat.	Stock Number	Reserved Qty	Issued Qty	Unit	Material	Bin Loc.	Unit Cost	Ext Cost of Net Returns
0	AA	STK	3408400314	1.00	0.00	EA	WRENCH FOR SPRINKLER HEADS W-TYPE 9	06F05	\$10.00	\$10.00
Total Cost of Issued Items:										

Date Filled: _____
Name: _____

Received By Emp #: _____
Printed Name: _____
Signature: _____
Received By Emp #: _____
Received Date: _____

May 24, 2013 5:06 PM

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Submit the report to the Head Stock Clerk for review and issuance of the material.

Should you have any questions on this guide or any Maximo 7.5 guides in general, please contact the Danny Lu (danny.lu@lausd.net / 213-241-0537) or Mark Merrick (mark.merrick@lausd.net / 213-241-0334)