

Los Angeles Unified School District

Maximo 7.5 / Procurement

Desktop Requisition Guide / Planned Job



DEFINITION

The **Desktop Requisition Guide / Planned Job** is designed for material requisitions against a local M&O Storeroom inventory against Planned Job work orders that has reached the status of Funded or greater (e.g. FUNDED, INPRG, SCH, etc...) The guide details step by step instructions on how to reserve M&O Storeroom inventory in the Desktop Requisition application.

1. LOGIN

The requestor performs this function.

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

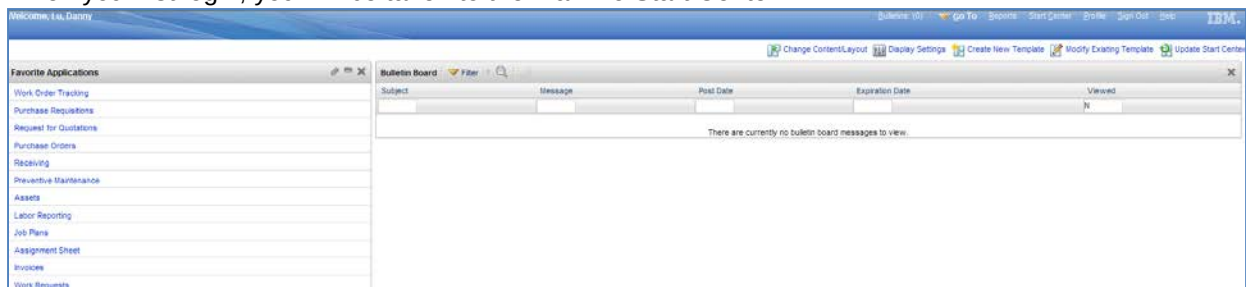
Enter your **Single sign-on** username and password and click on the **Sign In** button.



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 has a blue header with the text "Welcome, Lu, Danny" and navigation links like "Bulletin Board", "Go To", "Reports", "Start Center", "Home", "Sign Out", and "Help". Below the header is a toolbar with icons for "Change Content/Layout", "Display Settings", "Create New Template", "Modify Existing Template", and "Update Start Center". The main area is divided into two sections. On the left is a "Favorite Applications" list with items like "Work Order Tracking", "Purchase Requisitions", "Request for Quotations", "Purchase Orders", "Receiving", "Preventive Maintenance", "Assets", "Labor Reporting", "Job Plans", "Assignment Sheet", "Invoices", and "Work Requests". On the right is a "Bulletin Board" section with a table header: "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."



2. CREATE DESKTOP REQUISITION

Under the Favorite Applications section, click on the **View Requisition** application.

Welcome, Lu, Danny

Favorite Applications

- Work Order Tracking
- Labor Reporting
- View Requisition**
- Purchase Requisitions
- Request for Quotations
- Purchase Orders
- Receiving
- Preventive Maintenance
- Assets
- Job Plans
- Invoices
- Work Requests
- Companies
- Issues and Transfers

VIEW REQUISITION HOME

You will then be taken to the **View Requisition** home screen; in this screen, you may search for existing requisitions or create a new requisition by clicking on the **Create Desktop Requisition** icon.

View Requisition

Create Desktop Requisition Requisitions View Drafts

Search for Requisitions

Requisition:

Requested By: »

Requested For: »

Status: 🔍

🔍 Advanced Search ▾ 📄 Save Query ▾

Requisitions: Filter > 1 - 8 of 8

Requisition	Description	Entered Date
278500	AA, 14181404, FREMONT SH	6/26/13 11:03 AM
278494	TEST	6/13/13 2:58 PM

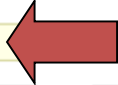


After clicking on the **Create Desktop Requisition**  icon, a **Requisition** number auto populates.

Create Desktop Requisition

 View Requisition  View Templates  View Drafts

Create Requisition

* Requisition: 278463 

Template: 

Required Date: 

Fill in the following fields

Short Description Create the description using the following naming convention: Craft Code, Work Order Number, and Location Name of the Project (e.g. AA 14183033 FREMONT SH). If necessary, you may add additional details in the long description box by clicking on the  icon.

* Requisition: 278463 AA 14183033 FREMONT SH 

Template (optional) If you have a Desktop Requisition template, you may select the template by typing in the template number and/or searching for the template by clicking on the  icon.

Required Date Enter the required date/time for this material order.

Required Date: 7/1/13 12:00 AM 

Requested By/For The Requested By/For field defaults to your employee number, you may change the employee number if you are ordering for someone else or leave it as is if you are ordering for yourself.

Priority Enter the requisition priority (1 being the lowest and 5 being the highest)



SHIPPING INFORMATION

The Shipping Information section displays the address of where you want the stores material to be shipped or picked up. The **Ship to** field may/may not default a value. You may contact your Principal Clerk/Admin Analyst to update your defaulted **Ship to** value if necessary. Otherwise, verify/enter the correct ship to 4 digit address/section code.

The screenshot shows the 'Shipping Information' form with the following fields and values:

- Ship to: 0640 (indicated by a red arrow)
- Address: 333 S BEAUDRY AVENUE, 22ND FLOOR
- City: LOS ANGELES
- State/Province: CA
- ZIP/Postal Code: 90017
- Drop Point: (empty)

CHARGE INFORMATION

The Charge Information section is where you identify what work order number the material will be ordered against. Enter the work order number in the **Work Order** field.

The screenshot shows the 'Charge Information' form with the following fields and values:

- GL Debit Account: CC:000186500
- Work Order: 14183033 (indicated by a red arrow)
- Location: S-13475
- Asset: (empty)

Additional information visible in the form includes 'ceiling tiles in Main building, classroom 1' and 'FREMONT SH'.

Verify that all fields are complete and click on the **Continue** button when finish.

The screenshot shows the full 'Create Requisition' form. The 'Shipping Information' and 'Charge Information' sections are expanded, showing the same data as the previous screenshots. A red arrow points to the 'Continue' button at the bottom right of the form.



3. STEP 2: ADD MATERIALS

Under the **Requisition Line Items** section, click on the **New Row** button.

The screenshot shows the 'Requisition Line Items' table with columns: Line #, Quantity, Required Date, Item, Description, Vendor, and Store Location. The table is currently empty, showing 'No rows to display...'. A red arrow points to the 'New Row' button in the bottom right corner of the table.

The Details of the new row will appear. The **Line Type** defaults to **Item**. Leave this value as is.

The 'Details' section shows the following fields:

- * Line: 1
- * Line Type: Item (dropdown menu)

A red arrow points to the 'Line Type' dropdown menu.

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 'Requisition Line Items' table with one row. The 'Details' section is expanded, showing the following fields:

- * Line: 1
- * Line Type: Item
- Item: [Empty field] >> (A red arrow points to the search icon to the right of the Item field.)
- Condition Code: [Empty field]
- Classification: [Empty field]
- Class Description: [Empty field]
- * Quantity: [Empty field]
- * Order Unit: [Empty field]

A context menu is open over the 'Go To' field, with the 'Inventory' option selected. The menu options are: Select Value, Classification, Attributes, Go To, View Item Availability, and View Image. A red arrow points to the 'Go To' option, and another red arrow points to the 'Inventory' option in the menu.



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

Inventory

Find: [wrench] Select Action [icon]

List Inventory Reorder Details Rotating Assets Where Used

Advanced Search Save Query Bookmarks

Inventory: Filter [icon] 0 - 0 of 0

Item	Description	Storeroom	Current Balance	Commodity Group
[wrench]	wrench	STORES-1		

To find records, use the filter fields above and then press Enter.
For more search options, use the Advanced Search button above.
To enter a new record, select the Insert icon in the toolbar.

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

Inventory

Find: [wrench] Select Action [icon]

List Inventory Reorder Details Rotating Assets Where Used

Advanced Search Save Query Bookmarks

Inventory: Filter [icon] 1 - 20 of 44

Item	Description	Storeroom	Current Balance	Commodity Group
[wrench]	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.

Inventory

Find: [wrench] Select Action [icon]

List Inventory Reorder Details Rotating Assets Where Used

Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9

Storeroom: STORES-10 Storeroom for Area 10

Lot Type: SOLE

Issue Cost Type: AVERAGE

Receipt Tolerance %:

Site: LAUSD

Status: ACTIVE

Default Bin: DEPOS

Default Stage Bin:

Capitalized? []

KIT []

Attachments

Issue Unit: EA

Condition Enabled? []

Rotating? []

Consignment? []

Requires hard reservation on use? []

Available Balance Summary

Current Balance:	7.00
Hard Reserved Quantity Not Staged:	0.00
Hard Reserved Quantity Shipped:	0.00
Total Quantity Shipped:	0.00
Expired Quantity in Stock:	0.00
Quantity Available:	7.00

Other Balance Summary Information

Quantity Currently Reserved:	0.00
Hard Reserved Quantity:	0.00
Soft Reserved Quantity:	0.00
Quantity Staged:	0.00
Quantity in Holding Location:	0.00

ABC Analysis

ABC Type: []

Count Frequency: 9

Issue History

Last Issue Date:	
Year to Date:	0.00
Last Year:	0.00
2 Years Ago:	0.00
3 Years Ago:	0.00



The value will be returned back to your **Item** field.

Requisition Line Items Filter 1 - 1 of 1

Line	Quantity	Required Date	Item
1		7/1/13 12:00 AM	3408400314

Details

* Line: 1

* Line Type: Item

Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9

Enter the **Quantity** needed.

* Quantity: 2

Confirm **Store Location** 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.

Store Location: STORES-10

Review your entry. You may order additional material by clicking on the **New Row** button or **Continue** to move to the next step.

Step 1 Step 2 Review and Submit

Back Continue

Line	Quantity	Required Date	Item	Description	Vendor	Store Location
1	2	7/5/13 12:00 PM	3408400314			

Details

* Line: 1

* Line Type: Item

Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9

Condition Code:

Classification:

Class Description:

* Quantity: 2

* Order Unit: EA

Unit Cost: 10.00

* Line Cost: 0.00

* Currency: USD

Manufacturer:

Model:

Vendor:

Catalog #:

Store Location: STORES-10

DL Debt Account: CC 000189500

* Reservation Type: AUTOMATIC

* Required Date: 7/5/13 12:00 PM

Inspection Required?

Is Distributed?

Attachments

New Row



4. REVIEW AND SUBMIT

Review the requisition for accuracy. You may click on the **Back** button if you need to make any changes, if not, click on the **Submit** button to generate the request.

The screenshot shows the 'Review and Submit' step of a Maximo Desktop Requisition. It includes sections for Shipping Information, Charge Information, and a table of Requisition Line Items. A red arrow points to the 'Submit' button at the bottom right.

Line #	Quantity	Required Date	Item	Description	Vendor	Store Location	Line Cost	Is Distributor?
1	2.00	7/5/13 12:00 PM	3408400314	WRENCH FOR SPRINKLER HEADS W/ TYPE 9		STORES-10	20.00	

After clicking on the Submit button, a new **Requisition Submitted** window will appear. Click on the **View Details** to print the **Desktop Requisition** report.

The screenshot shows the 'Requisition Submitted' window. It displays the message 'Desktop Requisition 278507 has been submitted.' and three buttons: 'View Details', 'Return to Start Center', and 'Create Another Requisition'. A red arrow points to the 'View Details' button.

You will be taken back to your requisition where you can click on the **Print View**  icon to print the **Stock Material Requisition** report. The report will print automatically to your default printer.

The screenshot shows the 'View Requisition' page for Requisition 278507. It includes fields for Requisition Number, Required Date, Status, and Requested By. A red arrow points to the 'Print View' icon in the top right corner.

After clicking on the **Print View**  icon, the **Stock Material Requisition** report will automatically print from your default printer.



Los Angeles Unified School District

Existing Facilities
Maintenance & Operations

Stock Material Requisition

Parameters Entered:	Storeroom:	 * S T O R E S - 1 *	Actual material issues and returns with transaction date of:							
Authorized By Labor Code: 783929		Printed By:								
Material Line Craft:		Task IDs:								
W.O. Number: 24888155  * 2 4 8 8 8 1 5 5 *	GL Account: CC: 0001646601-11731	School: SAN GABRIEL EL	School Code: 6466	Lead Craft Code: AA						
Reserved Date: 8/4/14										
Authorized By (Print / Sign): Peterson, Richard D., 783929	Area/Region: CH	Issued To: Hawkins, Rudy 563706	Report Date and Time: Aug 1, 2014 8:27 AM							
Comments:										
Task ID	Plan Matl Craft	Cat.	Stock Number	Reserved Qty	Issued Qty	Unit	Material	Bin Loc.	Avg Unit Cost	Ext Cost
Total Cost of Issued Items:										
No reserved items found based on the criteria provided										
Date Filled: _____						Received By Emp #: _____				
Issued By Name: _____						Printed Name: _____				
Signature: _____						Signature: _____				
						Received Date: _____				
Delivered To (if applicable):										
Printed Name: _____						Printed Name: _____				
Signature: _____						Signature: _____				
Received Date: _____						Received Date: _____				

Requestor to obtain the **Authorized By** Signature and submit the report to the **Head Stock Clerk** for review and issuance of the material.

Head Stock Clerk or designee who issues the material is required to fill in the **Issued By** fields and the receiver to fill in the **Received By** fields. If the Receiver delivers the materials to a different individual, that individual will fill in the **Delivered To** fields.

Should you have any questions on this guide, please contact the Danny Lu (danny.lu@lausd.net / 213-241-1121), Mark Merrick (mark.merrick@lausd.net / 213-241-7013), or John Herweg (john.herweg@lausd.net / 213-241-1127).