Post Date: 8/17/15

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

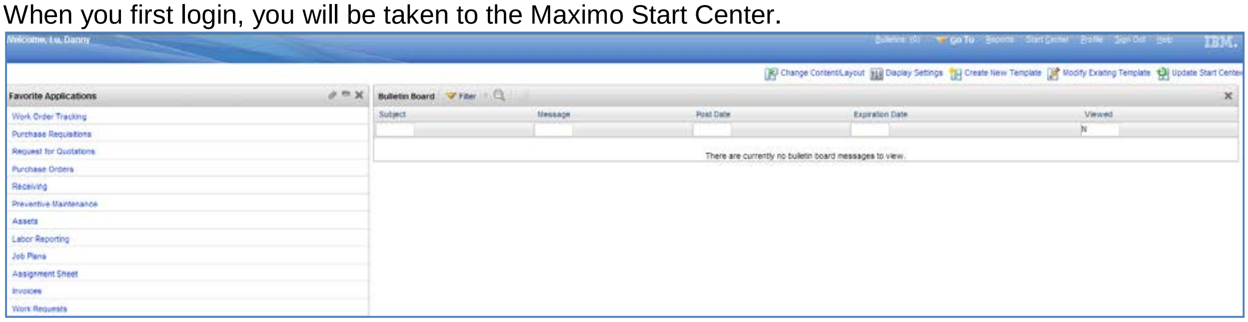
The requestor performs this function.

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.

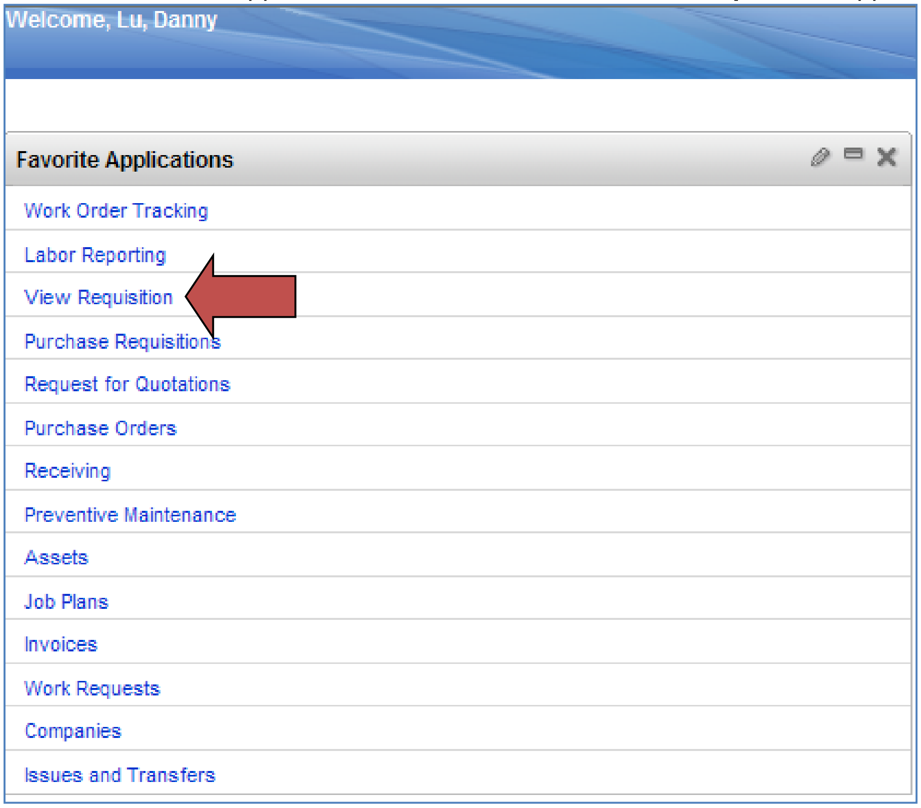
START CENTER

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



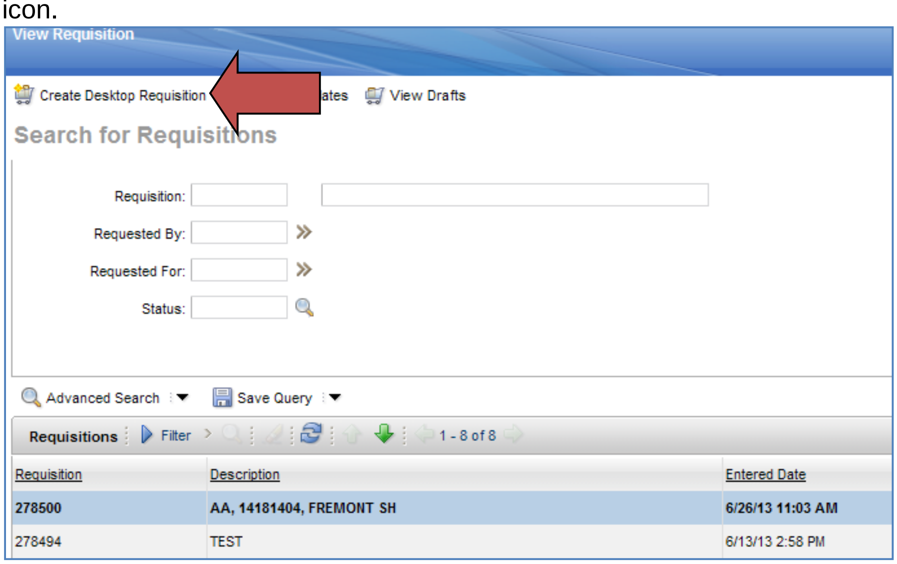
2. CREATE DESKTOP REQUISITION

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

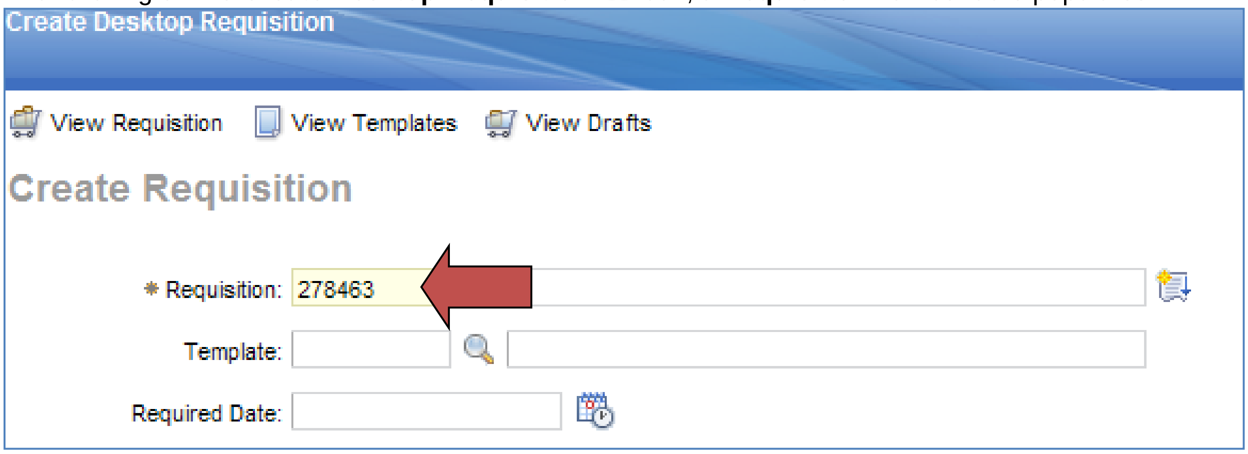


VIEW REQUISITION HOME

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.

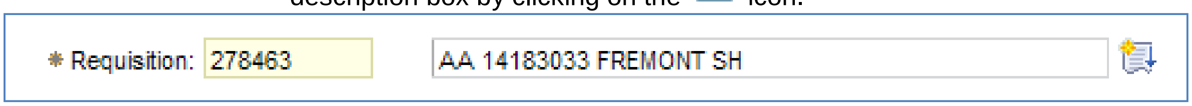


After clicking on the **Create Desktop Requisition** icon, a **Requisition** number auto populates.



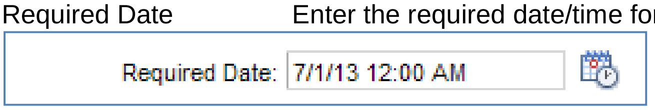
Fill in the following fields

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.



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.

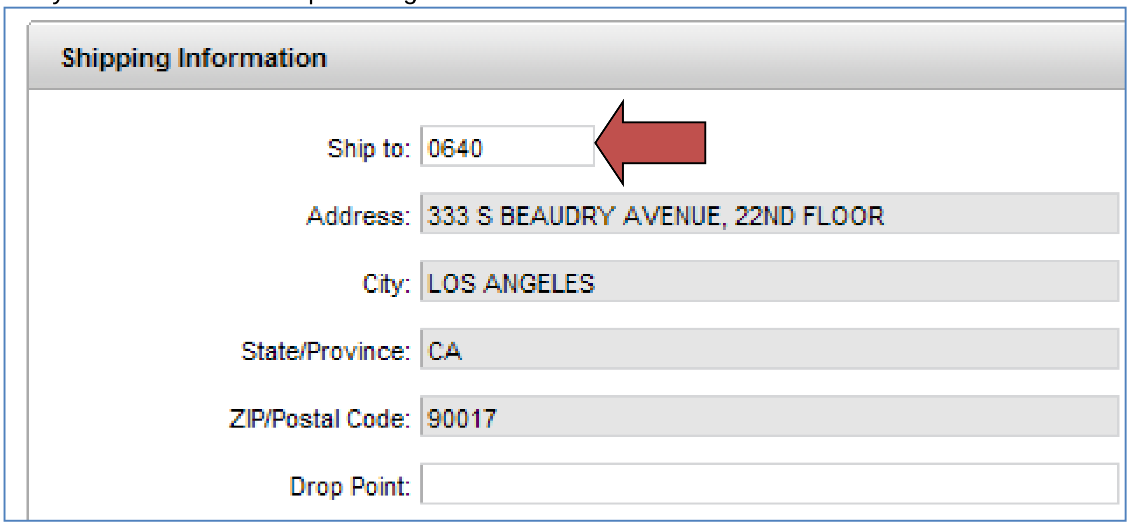


Requested By/For — The Requested By/For field defaults to your employee number, you may change the employee number if you are ordering for someone else or leave it as is if you are ordering for yourself.

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

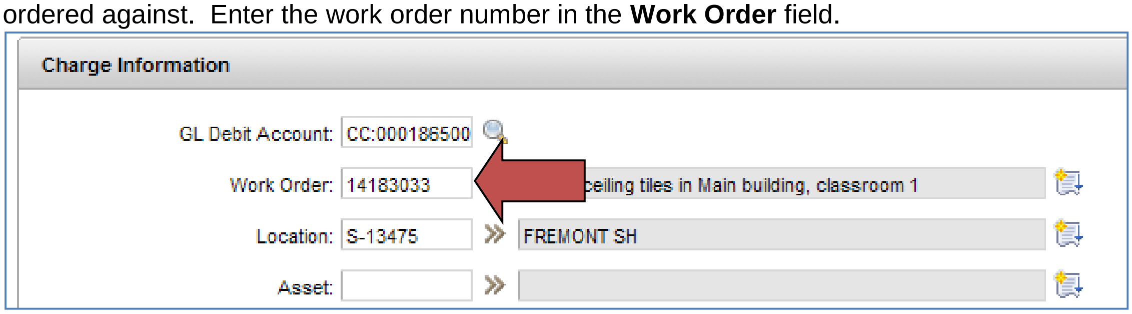
SHIPPING INFORMATION

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.

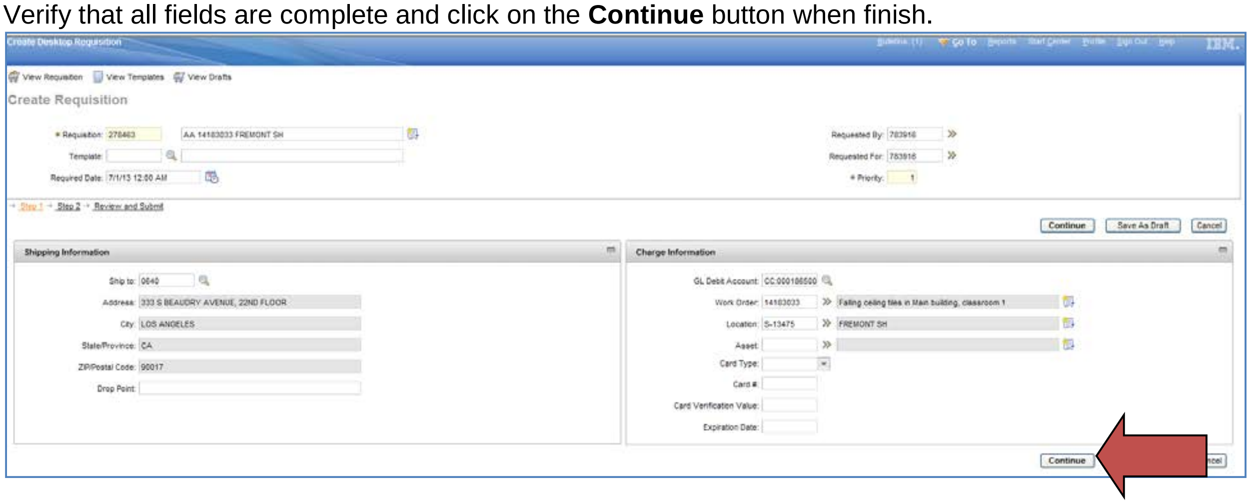


CHARGE INFORMATION

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.



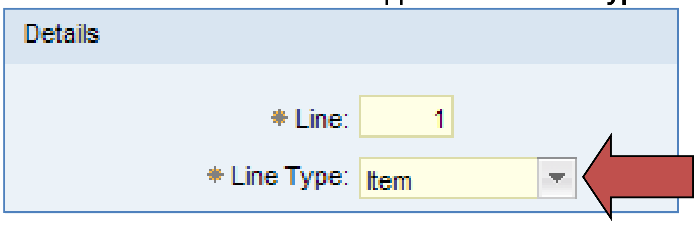
Verify that all fields are complete and click on the **Continue** button when finish.



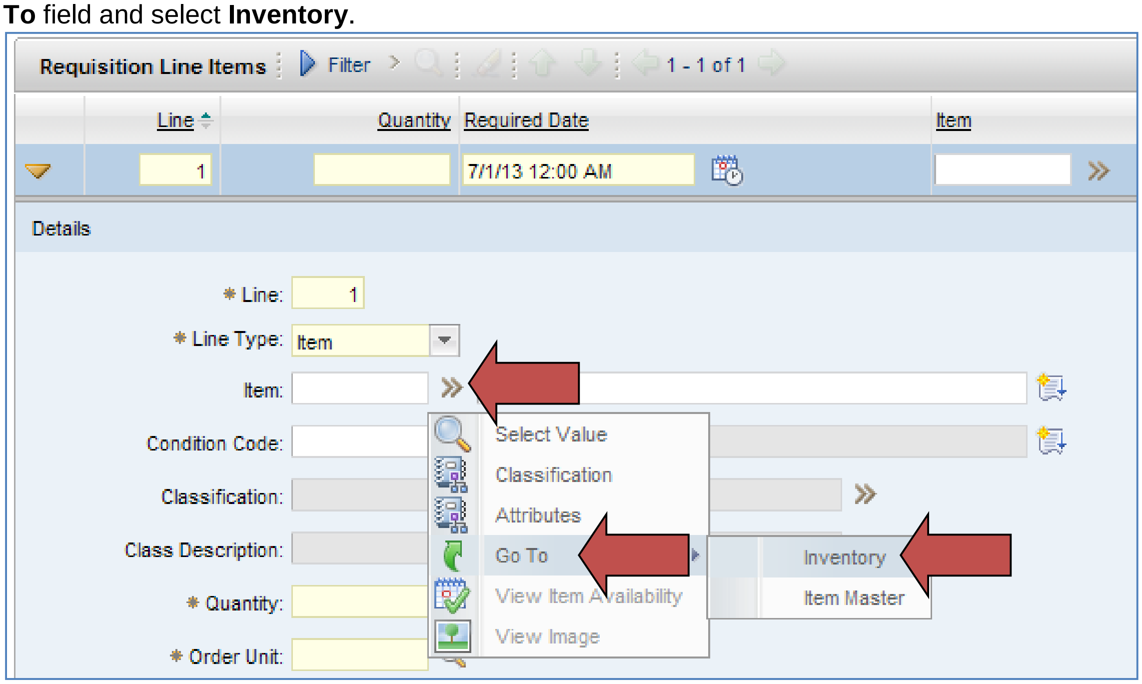
3. STEP 2: ADD MATERIALS

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

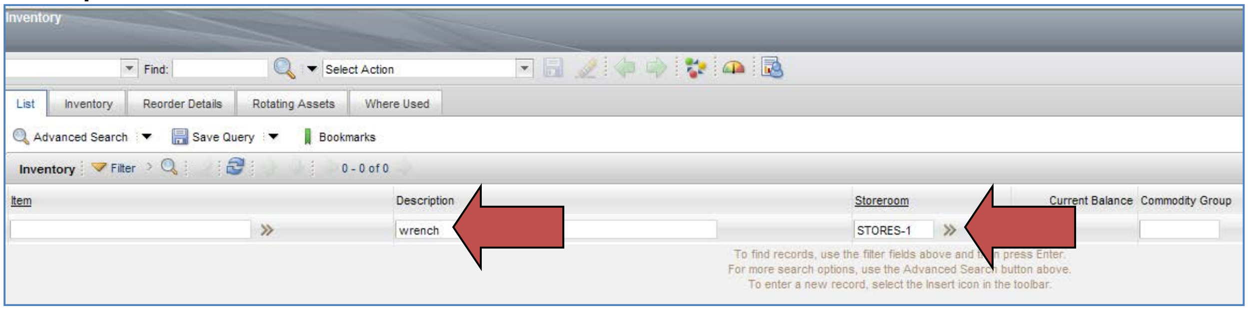
The Details of the new row will appear. The **Line Type** defaults to **Item**. Leave this value as is.



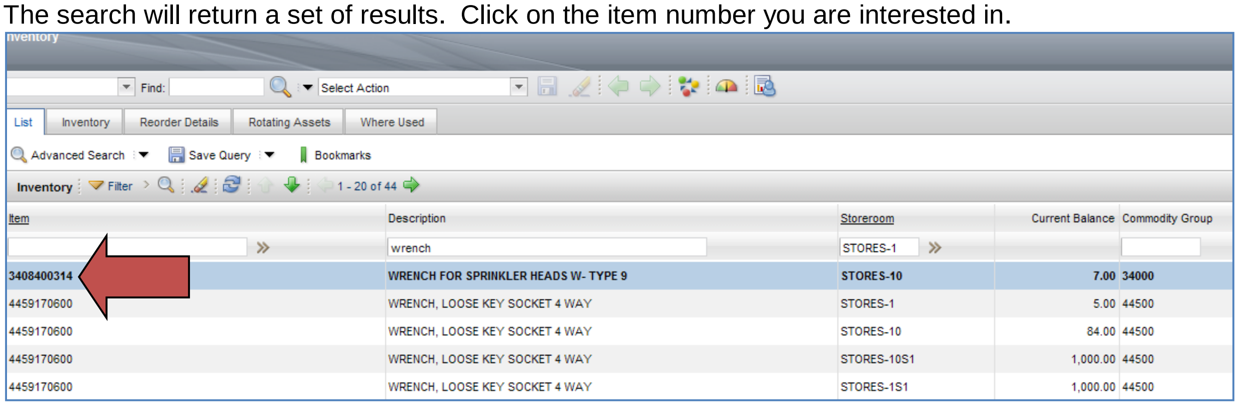
Enter the **inventory Item number** in the **Item** field. If you do not know the item number, you may search for it by clicking on the  icon to the right of the Item field. Hover your mouse over the **Go To** field and select **Inventory**.



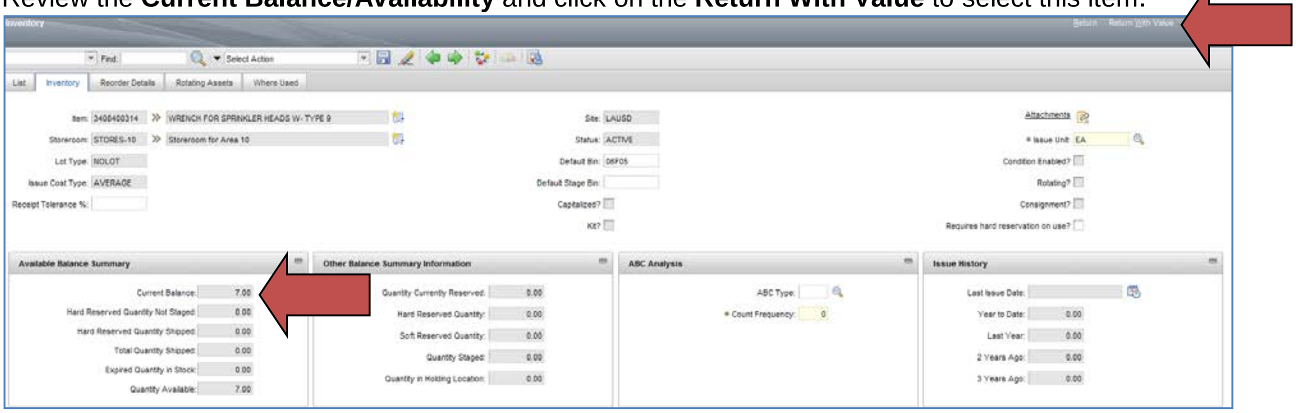
You will be taken to the **Inventory** application where you can search for by **Item Number, Description, or Storeroom**. Hit enter to search.



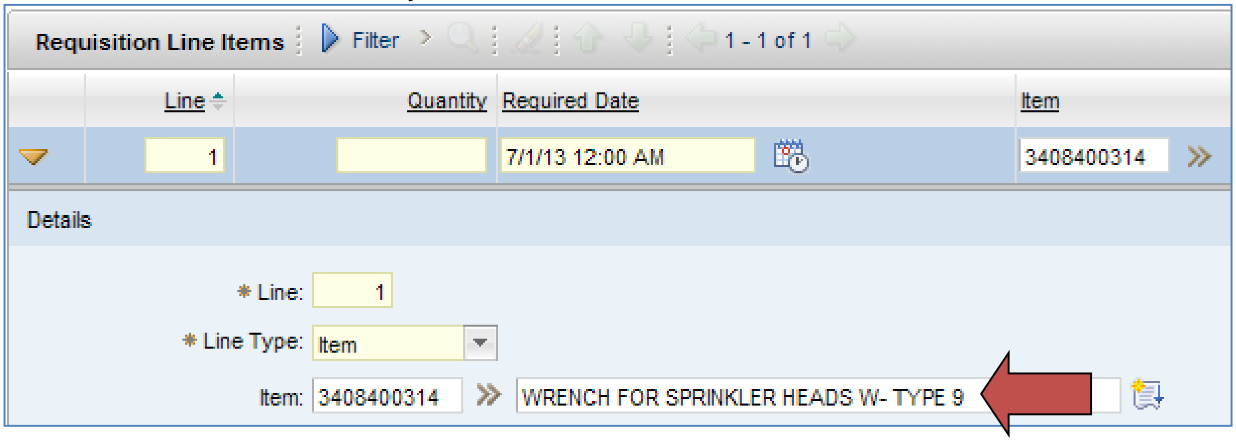
The search will return a set of results. Click on the item number you are interested in.



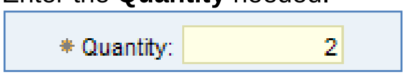
Review the **Current Balance/Availability** and click on the **Return With Value** to select this item.



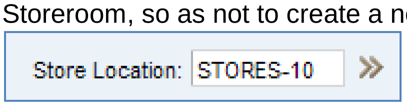
The value will be returned back to your **Item** field.



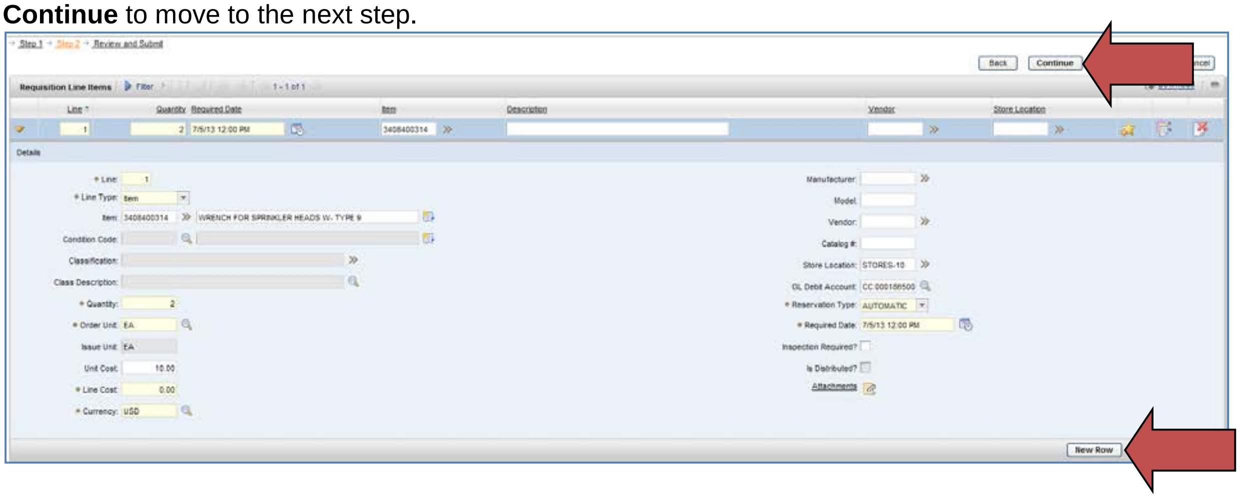
Enter the **Quantity** needed.



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.

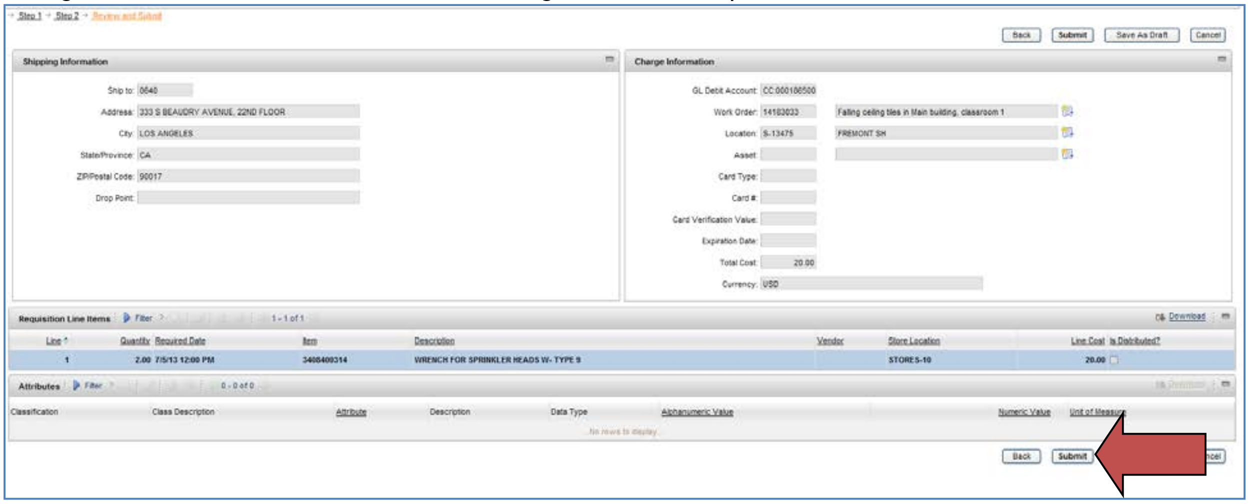


Review your entry. You may order additional material by clicking on the **New Row** button or **Continue** to move to the next step.

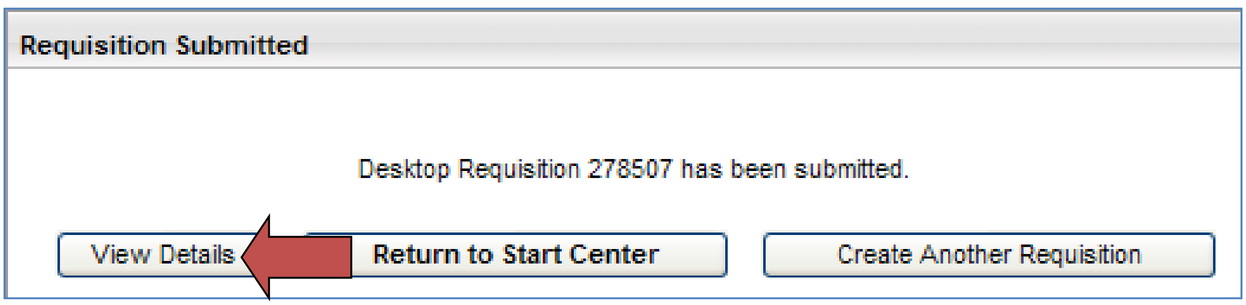


4. REVIEW AND SUBMIT

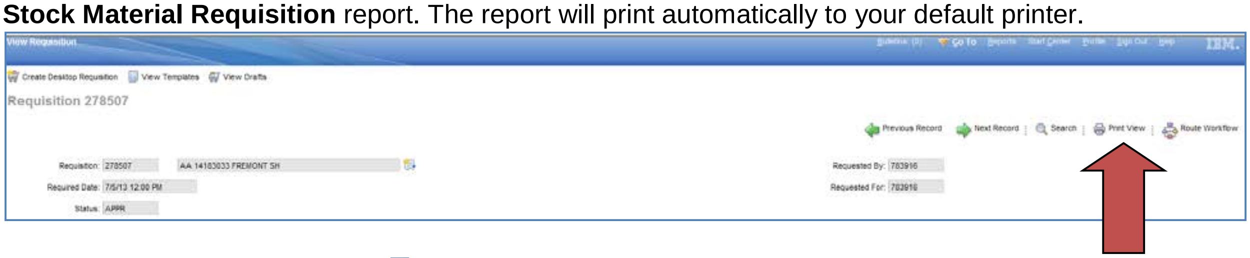
Review the requisition for accuracy. You may click on the **Back** button if you need to make any changes, if not, click on the **Submit** button to generate the request.



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



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.



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:	**GL Account:**	**School:**	**School Code:**	**Lead Craft Code:**	**Reserved Date:**
24888155 * 2 4 8 8 8 1 5 5 *	CC: 0001646601-11731	SAN GABRIEL EL	6466	AA	8/4/14

Authorized By (Print / Sign):	**Area/Region:**	**Issued To:**	**Report Date and Time:**
Peterson, Richard D., 783929	[illegible]CH	Hawkins, Rudy 563706	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 ________________
Issued By Name: ________________
Signature: ________________

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

Delivered To (if applicable): ________________
Printed Name: ________________
Signature: ________________
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.