



Los Angeles Unified School District

Maximo 7.5 / Work Order

RRGM Funded Planned Job (Type 98) Guide



DEFINITION

The RRGm Funded Planned Job (Type 98) guide is designed for projects that are funded through RRGm (general fund) and executed by line item employees (typically in the M&O Areas). The guide details step by step instructions on how to track and process a RRGm Funded Planned Job in the Work Order Tracking application.

1. WORK IDENTIFICATION

REQUEST FOR WORK

Work can be identified by a number of different parties. For example, Principals, Plant Managers or Designees may be the first to identify a need at the school and submit a Request for Work form to the CPM. The CPM consults with the Lead Craft involved to determine if the work will require a Planned Job.

SERVICE CALL WORK ESTIMATED OVER 100 HOURS

Work may be originally identified as a Service Call and, after investigation, be found to require more than 100 hours of labor. If work has begun on the Service Call, labor is charged against it, the Status is changed to Complete (COMP), and the Completed Service Call is referred to the CPM to initiate a Planned Job. If no work has begun on the Service Call, the Status is changed to Cancelled (CAN), with a note in the Memo field of the Status Change dialog box indicating the Service Call has been changed to a Planned Job. The Service Call is then referred to the CPM to initiate the Planned Job.

2. CONSULTATION WITH AREA MAINTENANCE PLANNER

The CPM or Designee performs this function.

Inform the Area Maintenance Planner that a Planned Job is being initiated and provide the scope of work. Area Maintenance Planner will analyze the proposed Planned Job and identify if a 'lifecycle' Work Order exist for the project. If a 'lifecycle' Work Order exists, the Area Maintenance Planner will create a Parent Work Order and attach the 'lifecycle' Work Order as a Child. The Area Maintenance Planner will then provide the CPM or Designee the Parent Work Order that will be used for planning.

If the Area Maintenance Planner discovers that the proposed Planned Job does not have an existing 'lifecycle' Work Order, the CPM or Designee will create a new Work Order.



3. LOGIN

The CPM or Designee performs this function.

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

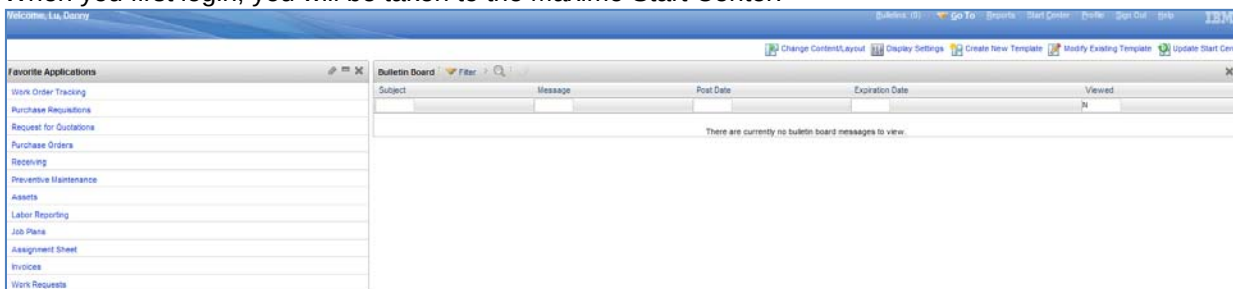
Enter your **Single sign-on** username and password and click on the **Sign In** button.



The login screen features the Tivoli software and IBM logos at the top. A large hexagonal nut graphic is on the left. The text "Welcome to Maximo" is centered. Below it are two input fields: "User Name:" with the text "danny.lu" and "Password:" with masked characters. A "Sign In" button is to the right of the password field. Below the button are links for "Forgot Password?" and "New User? Register Now". At the bottom, a copyright notice reads: "© Copyright IBM Corp. 2007-2012. All rights reserved. See product license for details."

START CENTER

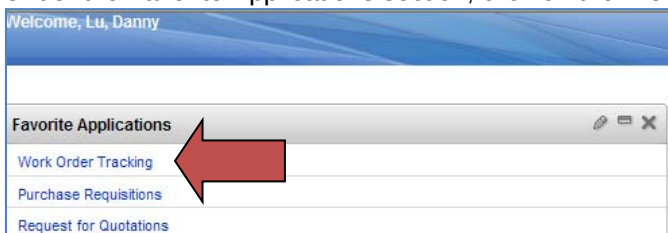
When you first login, you will be taken to the Maximo Start Center.



The Start Center dashboard shows a "Welcome, Lu, Danny" header. On the left is a "Favorite Applications" list with items like Work Order Tracking, Purchase Requisitions, and Request for Quotations. On the right is a "Bulletin Board" table with columns for Subject, Message, Post Date, Expiration Date, and Viewed. A message states: "There are currently no bulletin board messages to view."

WORK ORDER TRACKING

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



A close-up of the "Favorite Applications" list. It contains three items: "Work Order Tracking", "Purchase Requisitions", and "Request for Quotations". A red arrow points to the "Work Order Tracking" item.



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.

4. NEW WORK ORDER

To initiate a new work order, click on the  icon, located on the top toolbar.

A **Work Order** number will automatically populate along with the **Reported Date** and **Status**. Write the work order number on your planned job package. The status will begin as **Waiting on Approval (WAPPR)**. Fields with an asterisk* must be populated before the record can be saved.

Populate the following fields:

General Work Order Information

Work Description	Requestor Name
Cost Center	Requestor Title
Location	Work Type
Job Type	WO Priority
Section	Tracking Code

Scheduling Information

Target Start Date
Target Finish Date

Responsibility

Category Code
Routing Code

Field Breakdown

Work Description Type a brief description of the job in the Description field.

Cost Center The **Cost Center** is a new value that is introduced in Maximo 7.5. The cost center replaces the org code value in Maximo 5.2; the cost center is a 10 digit value, used to determine what Area/Organization budget is responsible for the service. For additional information, please see **Attachment A**.

To determine what the cost center number is, click on the  icon to the right of the **Costcenter** field.



Work Order Tracking

Find: Select Action

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan

Class: WORKORDER

* Work Order: 14183033

* Cost Center:

* Location:

A **Select Value** window appears, you may search for the Cost Center value by entering the school's org code and/or name in the Description field. Click enter when done.

Select Value

Filter 1 - 20 of 3343

Org Code	Cost Center	Description	Addr_1	City	Zip
8650					
1240	0001124001	ESC-REG E/F-SAAS			
1242	0001124201	SPEC PROJ DROPOUT PR			
1243	0001124301	DIAG LRNG CTR-AREAS			
1244	0001124401	VOC TRG CTR-HDC-GR A			

Select Value

Filter 1 - 20 of 3343

Org Code	Cost Center	Description	Addr_1	City	Zip
		Fremont			
1240	0001124001	ESC-REG E/F-SAAS	TBD		
1242	0001124201	SPEC PROJ DROPOUT PREVENTION	355 S GRAND AVE RM 1440	LOS ANGELES, CA	90071
1243	0001124301	DIAG LRNG CTR-AREAS	TBD		

Select the appropriate Cost Center by clicking on the Cost Center value.

Select Value

Filter 1 - 1 of 1

Org Code	Cost Center	Description	Addr_1	City	Zip
8650					
8650	865001	FREMONT SH	7676 S SAN PEDRO ST	LOS ANGELES, CA	90003

Once you click on the Cost Center value, the value will appear on your Cost Center field.

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log

Class: WORKORDER

* Work Order: 14183033

* Cost Center: 0001865001

* Location:

After selecting the appropriate Cost Center, the system will auto populate a location value in the Location field. The value will have a prefix of "S-XXXXX" which represents the "supersite" level of the Cost Center.



New Location Hierarchy

Level 1: **Supersite (S-XXXXX)** – The “Supersite” represents the District property line the cost center inhabits. District property lines are defined by the LA County Assessor’s office. The name of the supersite is typically the same name as the dominant/largest school (cost center) within the property line.

There are locations (cost centers) that share the same property line. As a result, the name of the supersite containing all of the cost centers on the property line is the same.

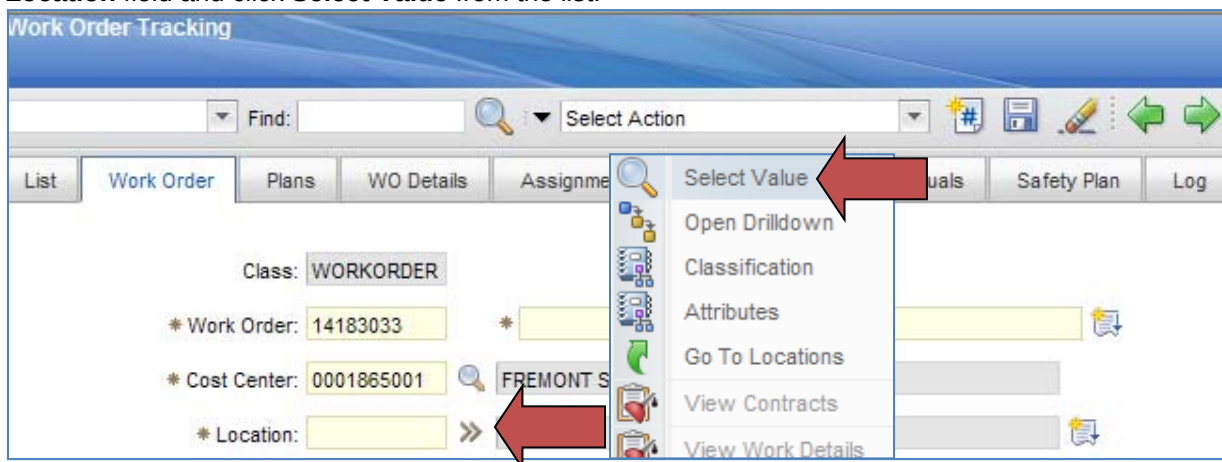
Level 2: **Building (B-XXXXX)**

Level 3: **Floor (F-XXXXX)**

Level 4: **Room (R-XXXXX)**

***Note:** There are no longer “Site” level locations in Maximo 7.5. The “Site” level equivalent is now called the “Supersite.” For additional information, please see **Attachment A**.

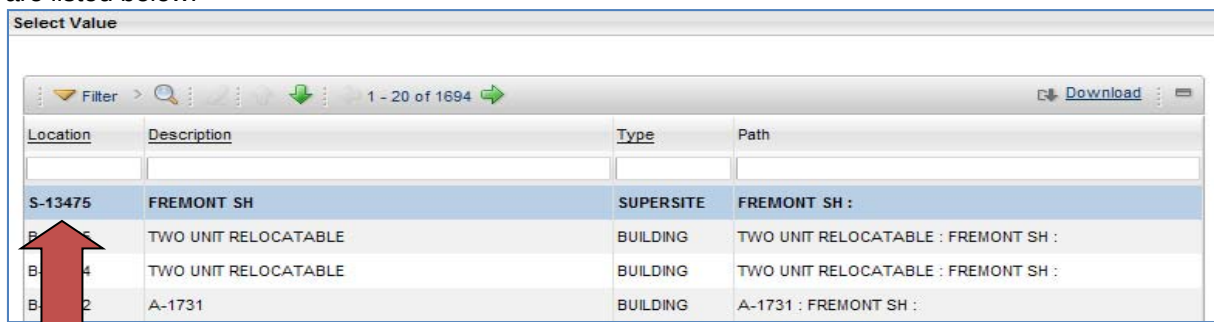
If you want to drill down further from the “supersite”, click on the  icon to the right of the **Location** field and click **Select Value** from the list.



The screenshot shows the 'Work Order Tracking' interface. The 'Location' field is highlighted with a red arrow pointing to the drill down icon. The 'Select Value' dropdown menu is open, showing options like 'Open Drilldown', 'Classification', 'Attributes', 'Go To Locations', 'View Contracts', and 'View Work Details'. A red arrow points to the 'Select Value' option in the dropdown.

A **Select Value** window appears with a list of locations that are under the cost center you selected earlier. Select the appropriate location by clicking on the location value (e.g. S-13475).

The “supersite” level location is listed on the top and subsequent building and room/floor locations are listed below.



The screenshot shows the 'Select Value' window with a table of locations. A red arrow points to the first row, which is the supersite level.

Location	Description	Type	Path
S-13475	FREMONT SH	SUPERSITE	FREMONT SH :
B-13475-1	TWO UNIT RELOCATABLE	BUILDING	TWO UNIT RELOCATABLE : FREMONT SH :
B-13475-2	TWO UNIT RELOCATABLE	BUILDING	TWO UNIT RELOCATABLE : FREMONT SH :
B-13475-3	A-1731	BUILDING	A-1731 : FREMONT SH :



After selecting the location value, the value will appear on your Work Order.

Work Order Tracking

Find: [] Select Action []

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log

Class: WORKORDER

* Work Order: 14183033

* Cost Center: 0001865001 FREMONT SH

* Location: S-13475 IT SH

Job Type Select Job Type **98 (Planned Job – M&O Area RRG M funded)**.

Section Leave the Section field blank. This field will auto-populate with its appropriate value after you enter the Category and Routing Code.

Requestor Type the name of the Director, CPM or other Designee requesting the job.

Requestor Title Type the title of the Requestor in the **Req. Title** field.

Work Type Choose the **Work Type** that best describes the job. You may type your selection directly into the field if you know the Work Type Codes. If you do not know the Work Type Codes, click on the field button  next to the Work Type field and the selection window opens.

Tracking Code Select the most appropriate tracking code in by clicking on the  icon.

Target Dates Enter a rough estimate of when work is expected to begin. In the Target Start Date and Target Finish Date fields, type in the date (e.g. 7/1/13) or click on the calendar icon  next to each field.

Category Code The Category Code designates the general craft or category of work to be done on the job, such as plumbing or carpentry. You may type your selection directly into the Category Code field if you know the Work Categories. If you do not know the Work Categories, click on the arrow  icon next to the **Category Code** field to view the menu.

Routing Code The Routing Codes are sub-menus of the Category Codes. After selecting the Category Code, the system filters the selection of Routing Codes to show you only those appropriate for the Category you have chosen. You may type your selection directly into the Routing Code field if you know the Routing Codes. If you do not know the Routing Codes, click on the spyglass  icon next to the **Routing Code** field. The Routing Code Lookup window opens. Select the Routing Code that ends in **-PL** (Planned Work).

**Sample screen shot of work order entry**

Verify that all of the information is complete. To save the record, click on the  icon, located on the top toolbar.

A "Record has been saved" message will appear.

5. DEFINE SCOPE OF WORK AND ATTACH DOCUMENTS (OPTIONAL)

The CPM or Designee performs this function.

Scope of Work Click on the button to the right of the Description field . A Long Description window appears.



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Work Order Tracking

BMXAA42051 - Record has been saved.

Find: [] Select Action []

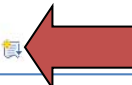
List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Class: WORKORDER

Work Order: 14183036 * Replace hot & cold water lines in Main Building

Parent WO: []

Work Type: CM



Type the Job Scope, complete with the Contact Person and other relevant information required for planning. The Lead Labor Group Planner will write the Craft Summary when the job has been approved for planning. Click **OK** on the bottom right of the screen to return to the Work Order.

Long Description

Replace hot & cold water lines in Main Building

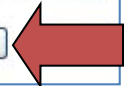
Remove and replace hot and cold water lines in Main Building. Contact person for this project is Joe Smith, Complex Project Manager.

Please see detail scope below:

- GA - Turn off water supply
- AA - Remove wall
- GA - Remove and replace hot and cold water lines
- AA - Patch Wall
- CA - Paint Wall

Reset Clear

OK



Attach Documents, Photos, Drawings (Optional)

You may attach documents to your work order by clicking on the Attachment icon.

Work Order Tracking

Find: [] Select Action []

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Class: WORKORDER

Work Order: 14183036 * Replace hot & cold water lines in Main Building

Parent WO: []

Work Type: CM

Cost Center: 0001855001 FREMONT SH

WO Priority: 1

Attachments

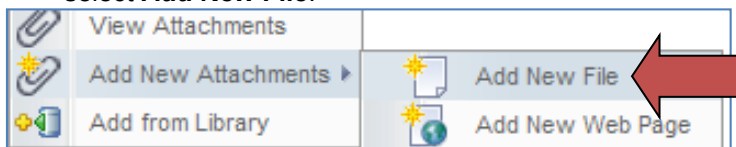
Reported Date: 5/22/13

Respond By: 5/22/13 8:30 AM





After clicking on the  icon, you have an option to **View Attachments**, **Add New Attachments** or **Add from Library**. To add a new file, hover your mouse over the **Add New Attachment** value and select **Add New File**.



A **Create a File Attachment** window will appear. Follow the on screen instructions to attach a document.

6. PRE-PLAN TASKS/LABOR

The CPM or Designee performs this function.

Click on the **Plans** tab.



Pre-Plan Tasks

On the **Plans** tab, click on the **New Row** button under the **Tasks for Work Order XXXX** section.

The screenshot shows the 'Plans' tab in the Maximo Work Order Tracking interface. The 'Tasks for Work Order 14183036' section is visible, showing a table with columns: Sequence, Task #, Mat Cat, Craft, Summary, Section, Job Type, Est Dur, and Status. A red arrow points to the 'New Row' button at the bottom right of the table.

The system automatically generates a **Task ID** for each task in increments of ten. Using your best judgment on what craft will be utilized on the project. Use the following naming convention:
PP- XX (XX = Craft Code).

For example, **PP- AA** for Carpentry.

Enter the total number of hours estimated for the task in the **Duration** field.

Note: The duration is the length of time the employee(s) in this craft would occupy on a schedule.

The screenshot shows the 'Tasks for Work Order 14183036' section in the Maximo Work Order Tracking interface. Red arrows point to the 'Task #', 'Mat Cat', 'Craft', 'Summary', 'Section', 'Job Type', and 'Est Dur' fields. The 'Est Dur' field is currently set to 40.00.

Click on the **New Row** button to repeat steps for the next task. Click on the  icon to save when finish.

Sample screen shot

Sequence	Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur
10	PP- AA				1431	99	60.00
20	PP- GA				1431	99	240.00
30	PP- CA				1431	99	40.00

Pre-Plan Labor

Each Task Line created above shall have a corresponding Labor line entry. Click on the **New Row** button under the **Labor** tab.

The screenshot shows the 'Labor' tab in the Maximo Labor interface. The 'Labor' section is visible, showing a table with columns: Task, Craft, Craft Description, Labor Category, Quantity, Hours, Rate, and Line Cost. A red arrow points to the 'New Row' button at the bottom right of the table.



Task ID: Enter the Task you are estimating the labor for (e.g. Task ID 10).

Craft Code: Enter the two-letter craft code of the craft that will be performing the task

Quantity: The system defaults the value to 1, but it can be changed to any number of employees you estimate will be needed on the task.

Labor Cat: The system defaults LR (Labor Regular), but can be changed to LO (Labor Overtime) if applicable.

Hours: Hours for **each** employee working on the task. The system automatically populates the hours based on the corresponding Task (duration field).

Task	Craft	Craft Description	Labor Category
10	AA	Carpenter	LR

Task: 10
Craft: AA
Labor Category: LR
Hours: 30:00
Quantity: 2
Burdened Rate: 56.86

Click on the **New Row** button to repeat steps for the next task.

Sample screen shot.

Sequence #	Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur	Status
10	10	AA	PP-AA		1431	99	60:00	WAPPR
20	20	GA	PP-GA		1431	99	240:00	WAPPR
30	30	CA	PP-CA		1431	99	40:00	WAPPR

Task	Craft	Craft Description	Labor Category	Quantity	Hours	Rate	Line Cost
10	AA	Carpenter	LR	2	30:00	56.86	3,411.60
20	GA	Plumber	LR	2	240:00	64.99	31,152.00
30	CA	Painter	LR	1	40:00	54.57	2,182.80

Click on the  icon to save when finish.

Find: Select Action
List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications
Work Order: 14183036 * Replace hot & cold water lines in Main Building
Parent WO: Status: WAPPR

7. PRINT/SUBMIT WORK ORDER DETAILS REPORT FOR PLANNING APPROVAL

The CPM or Designee performs this function.

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



Maximo 7.5 / RRGM Funded Planned Job (Type 98) Guide

Work Order Tracking

Find: Select Action

Change Status
Apply SLAs
View SLAs
Select/Deselect SLAs
Change Work Order Options
Create
View
Create Job Plan from Work Plan
Remove Work Plan
Select Safety Hazards
Remove Safety Plan
Apply Route
Enter Meter Readings
Report Downtime
Manage Downtime History
Assign to New Parent
Move/Swap/Modify
Modify/Delete Work Log
Select Owner
Take Ownership
Copy Doclinks to Work order
Attachment Library/Folders
Duplicate Work Order
Add to Bookmarks
Run Reports
Cognos Reporting

Work Order: 14183036 * Replace hot & cold

Children of Work Order 14183036 Filter

Sequence WON

Tasks for Work Order 14183036 Filter

Sequence	Task #	Mat Cat
10		
20		
30		

Labor Materials Services Tools

Labor Filter 1 - 3

Task	Cra
10	AA
20	GA

Parent WO:
Status: WAPPR

Location Location Description
...No rows to display...

Summary

PP- AA
PP- GA
PP- CA

Craft Description Labor Category

Carpenter	LR
Plumber	LR

A **Reports** window will appear. Click on the next arrow until you find the Work Order Details Report. Click on **Work Order Details**.

Reports

Select a report from the list, or click Create Report to create an ad hoc report.

On Demand Reports Scheduling Status

Reports to Run Filter 6 - 10 of 13

Description
Project_Cost_Estimate
Stock_Material_Requisition
Work Order Details
Work Order Details - Parameterized
Work Order Hierarchy

Create Report Cancel



A **Request** Page will appear. Click on the **Submit** button.

Request Page

Help Text

Parameters

Schedule

☒ Immediate
☐ At this Time
☐ Recurring

Email

To:
Subject:
Comments:

File Type: ☒ PDF ☐ XLS
Report Delivery Format: ☒ Email with a file attachment ☐ Email with a file URL

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

Page 1 of 1

Work Order Details

14183936: Replace hot & cold water lines in Main Building. Contact person for this project is Joe Smith, Complex Project Manager.

Please see detail scope below:
GA - Turn off water supply
AA - Remove wall
GA - Remove and replace hot and cold water lines
AA - Patch Wall
CA - Paint Wall

Asset:
Location: S-13475
CI: FREMONT SH

Sched Start	Sched Finish	Target Start	Target Finish	Actual Start	Actual Finish	Report Date	Reported By
		7/1/13	9/1/13			5/24/13	783916

Site	Priority	Work Type	Status	Parent	Failure Class	Problem Code	GL Account
LAUSD	1	CM	WAPPR				

Job Plan	Supervisor	Lead	Vendor	Owner	Owner Group	Service	Service Group	Classification

Planned Labor	Task ID	Craft	Skill Level	Labor	Vendor	Contract	Qty	Hours	Rate	Line Cost
	10	AA					2	30:00	56.86	3411.60
	20	GA					2	240:00	64.90	31152.00
	30	CA					1	40:00	54.57	2182.80
Total Planned Labor:										36746.40

5/24/13 10:47 AM

1 / 1

Submit the report to the AFSD or designee for review and approval.



8. AFSD/MANAGER TO REVIEW PLAN JOB AND APPROVE FOR PLANNING

The AFSD or Manager performs this function.

Review the **Work Order Details** report, if approved, proceed to the next step, otherwise re-route the report back to the CPM/Requestor to rework/clarify scope.

9. VERIFY TARGET DATES, CHANGE THE STATUS TO WAITING ON PLANNING (WPLAN) AND PLACE THE JOB ON THE PLANNING LIST

The AFSD or Manager performs this function.

Verify **Target Start/Finish dates** in the Scheduling Information section of the work order.

Scheduling Information

Start

Target Start: 7/1/13 12:00 AM

Scheduled Start:

Actual Start:

Start No Earlier Than:

Finish

Target Finish: 9/1/13 12:00 AM

Scheduled Finish:

Actual Finish:

Finish No Later Than:

Change the status to Waiting on Planning (WPLAN)

Click on the Change Status  icon in the top toolbar.

Work Order Tracking

Find: Select Action

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Class: WORKORDER

Work Order: 14183036 * Replace hot & cold water lines in Main Building

Parent WO: Work Type: CM

A **Change Status** window will appear. Select **Waiting on Planning (WPLAN)** from the New Status dropdown menu and click on the **OK** button.

Change Status

Work Order: 14183036 Replace hot & cold water lines in Main Building

Status: WAPPR Waiting on Approval (WAPPR)

* New Status: Waiting on Plan

* Status Date: 5/24/13 11:00 AM

Memo:

Print Work Order(s)?

Change work order status in back ground?

Notification E-mail for Work Order Change Status: danny.lu@lausd.net

OK

**Place the Job on the Planning List**

To place the job on the planning list, insert a planning priority number in the **Planning Priority** field.

Planning Priority:

To save the record, click on the  icon, located on the top toolbar.

Work Order Tracking

Find: Select Action

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Class: WORKORDER Parent WO:

Work Order: 14183036 * Replace hot & cold water lines in Main Building * Work Type: CM

Route/Inform the Lead Craft about the Planned Job and the need for planning.

10. LEAD LABOR GROUP REFINE JOB PLAN AND CHANGE STATUS TO IN PLANNING (INPLAN)

The Lead Craft Planner or Designee performs this function.

On the work order, click on the **Plans** tab.

Work Order Tracking

Find: Select Action

List Work Order Plans Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Class: WORKORDER Parent WO:

Work Order: 14183036 * Replace hot & cold water lines in Main Building * Work Type: CM

You will notice that there is already Planned Tasks/Labor on the work order. These are Pre-Planned estimates from the CPM/Requestor. Refine the values to the details of the scope.

Tasks for Work Order 14183036									
Sequence	Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur	Status	
10	AA			PP-AA	1431	99	60.00	WAPPR	
20				PP-GA	1431	99	240.00	WAPPR	
30				PP-CA	1431	99	40.00	WAPPR	

Labor							
Task	Craft	Craft Description	Labor Category	Quantity	Hours	Rate	Line Cost
10 AA		Carpenter	LR	2	30.00	56.88	3,411.60
20 GA		Plumber	LR	2	240.00	64.98	31,152.00
30 CA		Painter	LR	1	40.00	54.57	2,182.80

For example, change the task name from “PP- AA” to “AA- Remove 5x7 wall to expose hot and cold water lines” and refine the duration estimates.

Tasks for Work Order 14183036									
Sequence	Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur		
	10			AA- Remove 5x7 wall to expose hot and cold water lines.	1431	99	60.00		
	20			GA- Remove and replace hot and cold water lines.	1431	99	240.00		
	30			AA- Patch wall	1431	99	40.00		
	40			CA- Paint wall to match existing color	1431	99	2.00		



New Task

To create additional tasks, click on the New Row button. The system automatically generates a **Task ID** for each task in increments of ten. In the task description field, type in the **two-letter Craft Code**, **dash**, and a brief **Task Description**.

For example, **"GA- Remove and replace hot and cold water lines."**

Enter the total number of hours estimated for the task in the **Duration** field.

Note: The duration is the length of time the employee(s) in this craft would occupy on a schedule.

Click on the **New Row** button to repeat steps for the next task. Click on the  icon to save when finish.

Central Shops as support (if applicable)

If the Planned Job requires support from Central Shops, the Lead Craft will insert a separate task record and **additionally** fill in the appropriate **Category** and **Routing Code** for that task (Central Shops tasks only).

For example

Description: **CS- HW Fabricate cap for water line.**

Category Code: **WELDER**

Route Code: **CS-HW-PL** (Select the route code that begins with CS and end with PL)

Plan Labor

Each Task Line created above shall have a corresponding Labor line entry. Refine the existing labor lines that were created by the CPM/Requestor. To create a new Plan Labor, click on the **New Row** button under the **Labor** tab.



Task ID: Enter the Task you are estimating the labor for (e.g. Task ID 10).

Craft Code: Enter the two-letter craft code of the craft that will be performing the task

Quantity: The system defaults the value to 1, but it can be changed to any number of employees you estimate will be needed on the task.

Labor Cat: The system defaults LR (Labor Regular), but can be changed to LO (Labor Overtime) if applicable.

Hours: Hours for **each** employee working on the task. The system automatically populates the hours based on the corresponding Task (duration field).

Task	Craft	Craft Description	Labor Category
10	AA	Carpenter	LR

Task: 10
Craft: AA
Labor Category: LR
Hours: 30:00
Quantity: 2
Burdened Rate: 56.86

Click on the **New Row** button to repeat steps for the next task.

When you are done refining and adding additional tasks and labor, change the status to **In Planning (INPLAN)**.

Change the status to In Planning (INPLAN)

Click on the Change Status  icon in the top toolbar.

Work Order Tracking

Find: [] Select Action: []

Class: WORKORDER
Work Order: 14183036
Description: Replace hot & cold water lines in Main Building
Parent WO: []
Work Type: CM

A **Change Status** window will appear. Select **In Planning (INPLAN)** from the New Status dropdown menu and click on the **OK** button.

Change Status

Work Order: 14183036
Description: Replace hot & cold water lines in Main Building
Status: WPLAN
Waiting on Planning (WPLAN)
New Status: In Planning (INF)
Status Date: 5/24/13 11:27 AM
Memo: []
Print Work Order(s)? []
Change work order status in back ground? []
Notification E-mail for Work Order Change Status: danny.lu@lausd.net
OK



11. LEAD LABOR GROUP DETERMINE IF SUB LABOR GROUP WILL BE NEEDED

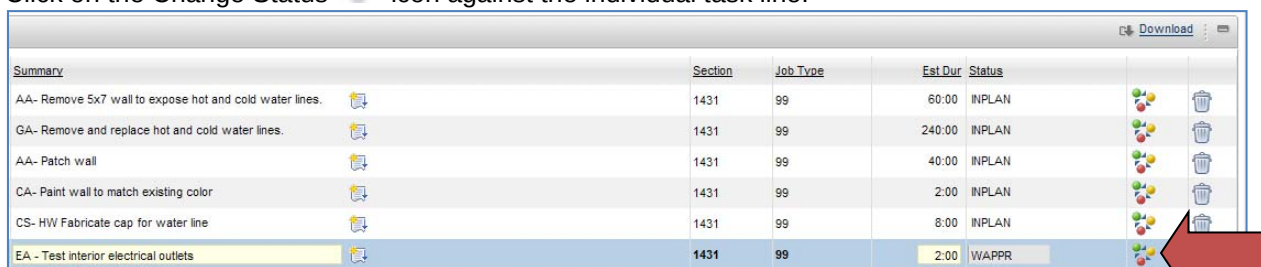
The Lead Labor Group/Planner or Designee performs these functions.

Based on scope, determine if sub labor group is needed to assist in planning. If yes, route the job package to the pertinent sub labor groups.

Each sub labor group to create additional tasks and planned labor (if necessary) in sequential order. **See instruction on page 17 and 18** on how to plan task and labor.

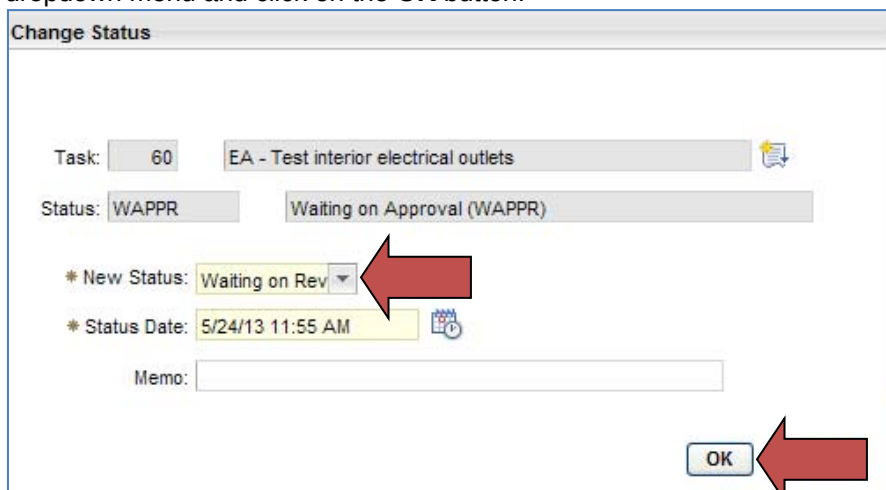
As each of the sub labor group tasks are complete. The individual sub labor groups will need to change the individual task statuses from Waiting on Approval (WAPPR) to Waiting on Review (WREVIEW).

Click on the Change Status  icon against the individual task line.



Summary	Section	Job Type	Est Dur	Status	
AA- Remove 5x7 wall to expose hot and cold water lines.	1431	99	60:00	INPLAN	
GA- Remove and replace hot and cold water lines.	1431	99	240:00	INPLAN	
AA- Patch wall	1431	99	40:00	INPLAN	
CA- Paint wall to match existing color	1431	99	2:00	INPLAN	
CS- HW Fabricate cap for water line	1431	99	8:00	INPLAN	
EA - Test interior electrical outlets	1431	99	2:00	WAPPR	

A **Change Status** window will appear. Select **Waiting on Review (WREVIEW)** from the New Status dropdown menu and click on the **OK** button.



Change Status

Task: 60 EA - Test interior electrical outlets

Status: WAPPR Waiting on Approval (WAPPR)

* New Status: **Waiting on Rev**

* Status Date: 5/24/13 11:55 AM

Memo:

OK

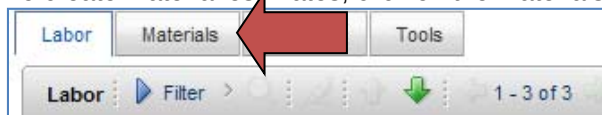
Repeat status change steps for all sub labor group task lines.

12. CREATE MATERIAL ESTIMATES

Material estimates consist of **Planned Contract, Planned Material, and Mileage**.



To create Material estimates, click on the Materials tab.



Click on the **New Row** button to create a new Material estimate line.



Enter the following

Task ID Enter the **Task ID** number that corresponds to the first Task for your Craft. This enables a Materials Report to be run by Craft on the reference Work Order.

Material Cat Click on the spyglass  icon to the right of the **Material Category** field for options. Type in **MA** for Materials or go to the spyglass and choose Select Value for other options. If an A or B Letter is being used for material purchasing, select the **CO** (Contract) option. If Mileage is being charged to a Task, select the **MI** (Mileage) option. There is also an OT (Other) option, which is unburdened.

Description Enter the two-letter Craft Code, and a brief **Description** of the Material item. For example, **EA-Electrical Materials** or **EA- Mileage**.

Quantity The system automatically provides “1”, but you can change to quantify estimate.

Craft Enter the Labor Group's two-letter Craft Code in the **Craft Code** field and **tab** to the next field.

Order Unit Enter **EA** for each.

Avg Cost Enter the Total Estimated **Cost** of Materials for the corresponding Task Line.

Click on **New Row** to add additional planned Material cost. When complete, Click on the  icon to save.

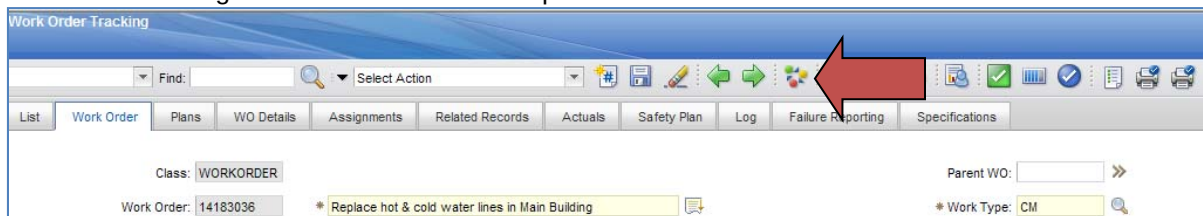
13. LEAD PLANNER CHANGE STATUS OF WORK ORDER TO WAITING ON REVIEW (WREVIEW). PRINT PLANNER DATA ENTRY AND ROUTE PLANNED JOB TO CPM/REQUESTOR

The Lead Planner or Designee performs these functions.



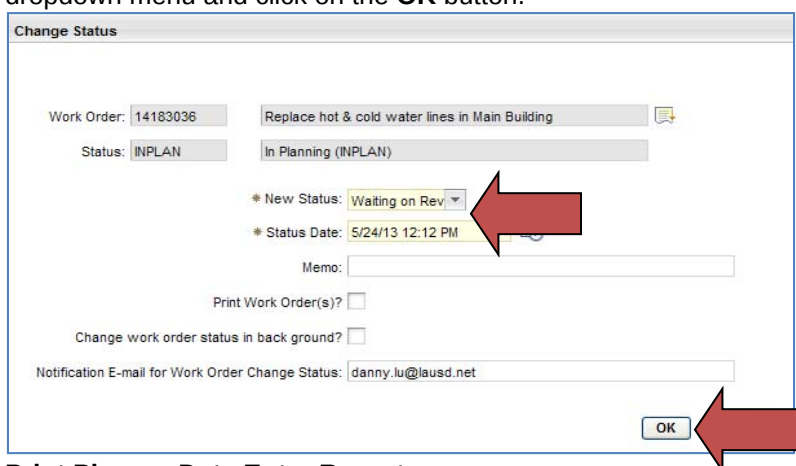
Change work order status to Waiting on Review (WREVIEW)

Click on the Change Status  icon in the top toolbar.



The screenshot shows the 'Work Order Tracking' interface. At the top, there is a 'Find:' field and a 'Select Action' dropdown. Below this is a tabbed menu with 'List', 'Work Order', 'Plans', 'WO Details', 'Assignments', 'Related Records', 'Actuals', 'Safety Plan', 'Log', 'Failure Reporting', and 'Specifications'. The 'Work Order' tab is active. Below the tabs, there are fields for 'Class: WORKORDER', 'Work Order: 14183036', and a description 'Replace hot & cold water lines in Main Building'. To the right, there are fields for 'Parent WO:' and 'Work Type: CM'. A red arrow points to the 'Change Status' icon in the top toolbar.

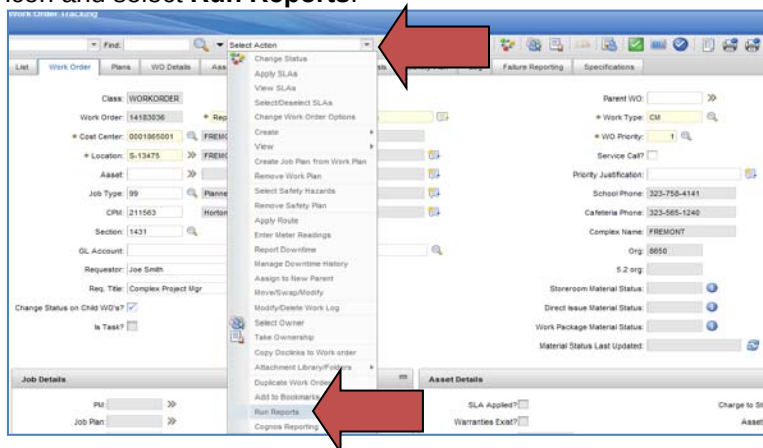
A **Change Status** window will appear. Select **Waiting on Review (WREVIEW)** from the New Status dropdown menu and click on the **OK** button.



The screenshot shows the 'Change Status' window. It contains fields for 'Work Order: 14183036' and 'Replace hot & cold water lines in Main Building'. Below these are 'Status: INPLAN' and 'In Planning (INPLAN)'. A 'New Status' dropdown menu is highlighted with a red arrow, showing 'Waiting on Rev'. Below this is a 'Status Date' field with the value '5/24/13 12:12 PM'. There is a 'Memo:' field, a 'Print Work Order(s)?' checkbox, a 'Change work order status in back ground?' checkbox, and a 'Notification E-mail for Work Order Change Status:' field with the value 'danny.lu@lausd.net'. An 'OK' button is at the bottom right, highlighted with a red arrow.

Print Planner Data Entry Report

To print the Planner Data Entry report, on the work order, click on the **Select Action** dropdown  icon and select **Run Reports**.



The screenshot shows the 'Work Order Tracking' interface with the 'Select Action' dropdown menu open. The dropdown menu lists various actions, including 'Change Status', 'Apply SLA', 'View SLA', 'Select/DeSelect SLAs', 'Change Work Order Options', 'Create', 'View', 'Create Job Plan from Work Plan', 'Remove Work Plan', 'Select Safety Hazards', 'Remove Safety Plan', 'Apply Route', 'Enter Meter Readings', 'Report Downtime', 'Manage Downtime History', 'Assign to New Parent', 'Move/Unassign/Modify', 'Modify/Delete Work Log', 'Select Owner', 'Take Ownership', 'Copy Checklist to Work order', 'Attachment Library/Filters', 'Duplicate Work Order', 'Add to Bookmarks', 'Run Reports', and 'Generate Reporting'. A red arrow points to the 'Run Reports' option. The background shows the same work order details as the previous screenshot.

A **Reports** window will appear. Click on the **Planner_Data_Entry** report.



Reports

Select a report from the list, or click Create Report to create an ad hoc report.

On Demand Reports Scheduling Status

Reports to Run Filter > 1 - 5 of 13 Download

Description
Calibration Work Order Data Sheet
Estimated vs Actual Work Order Costs
Job_Cost_Recap
Open Work Orders and PM
Planner_Data_Entry

Create Report Cancel

A **Request Page** will appear. Click on the **Submit** button.

Request Page

Help Text

Parameters

p_modifiedYN:

Schedule

☒ Immediate
☐ At this Time
☐ Recurring

Email

To:
Subject:
Comments:

File Type:
☒ PDF
☐ XLS

Report Delivery Format:
☒ Email with a file attachment
☐ Email with a file URL

Submit

A new **BIRT Report Viewer** window will appear. Review the Planner Data Entry report. To print, click on the  icon. The report will be exported into a PDF file where you can begin the print.



Reporting

Page 1 of 1

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Planner - Data Entry Form **WO# 14183036**

Parent WO#

School Name	Requested By Joe Smith	Phone	Reported 5/24/13	Year (*) 13	I/O #
-------------	---------------------------	-------	---------------------	----------------	-------

Org (Max 5.2)	Loc/Asset	Bldg Ins ID	Project No.	Prog	WBS	LD Craft	Target Dates
	S-13475					GA	Start 7/1/13 Finish 9/1/13

Location Description: FREMONT SH
Work Requested - Description: null.

Planned or Written By
Lu, Danny

Supervisor's Signature

Job Type Fund Area Org Prog Cnt Obj

Date Planned
5/24/13

Approved By

Date

Approved By Others

Date

Prty Ind Frg Bill Adult Status

Sequence	Fund	Area	Org	Prog	Fixed	Buyer %
PLANNER USE ONLY - Estimated Labor						
Ln	Labor	Craft	Reg Rate	OT Rate	Reg Hrs	Labor Est
1	REG	AA	\$32.69	\$0.00	30.00	\$980.69
2	REG	CA	\$31.37	\$0.00	40.00	\$1,254.92
3	REG	GA	\$37.31	\$0.00	240.00	\$8,954.84

Ln	Type	Craft	Material	Contract	Other	Mileage	Imprest
1	MA	AA Carpenter	\$5,000.00				

HOURS:	CONTRACT:	(**) INDIRECT CHARGE: @	19.30%	\$2,159.76
LABOR: \$11,190.45	MILEAGE:	FRINGE BENEFIT REG: @	45.80%	\$5,125.23
MATERIALS:	IMPREST:	FRINGE BENEFIT OT: @	14.50%	\$0.00
OTHER:	SUB TOTAL: \$11,190.45	(***) TOTAL:		\$18,475.43

* Fiscal Year when W.O. was changed to FUNDED or later status, else if not yet funded, current fiscal year. Post-funded W.O. statuses assumed to include FUNDED, INPRG, FCOMP, COMP, WINSP, PCOMP, REWORK, SCH, or CLOSE.

** Total Indirect Charge = (Labor Cost + Material Cost + Fringe Benefit Reg Cost + Fringe Benefit OT Cost) x Indirect Rate

Submit the report to the CPM or Designee for review and approval.

14. CPM REVIEWS PLANNER DATA ENTRY, UPDATE TARGET DATES, CHANGE STATUS OF WORK ORDER TO READY FOR REVIEW (REVIEW) AND SUBMIT PLANNED JOB TO AFSD

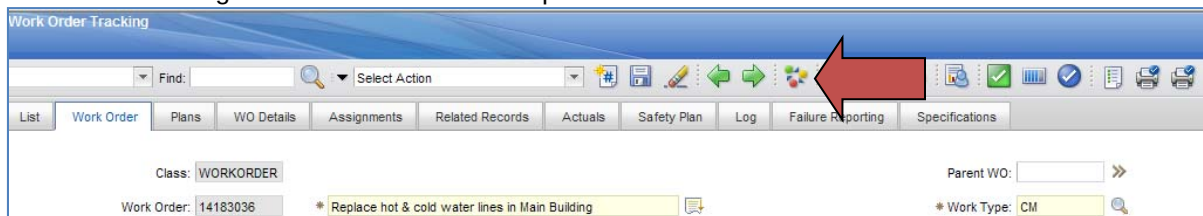
The CPM or Designee performs these functions.

Review the Planner Data Entry. If approve, update the **Target Start/Finish dates** (if necessary) and change the status of the work to **Ready for Review (REVIEW)** and proceed to the next step. If not, return Planner Data Entry form back to lead craft for adjustments.

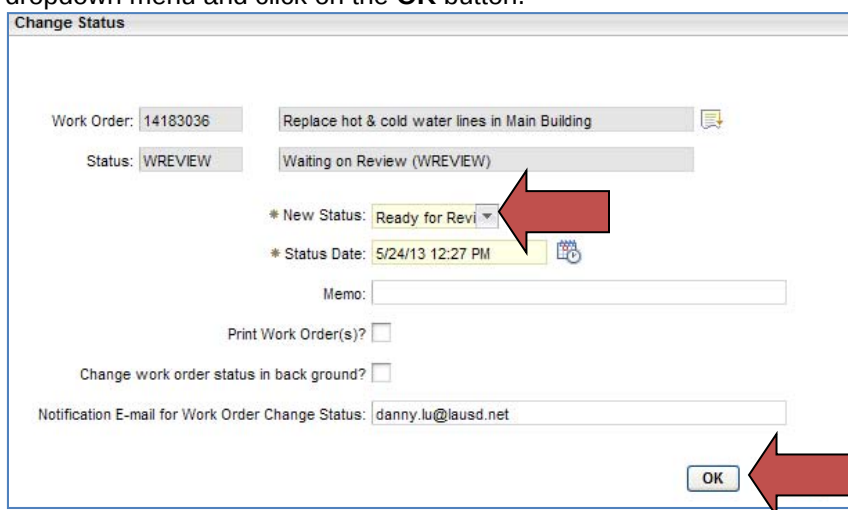


Change work order status to Ready for Review (REVIEW)

Click on the Change Status  icon in the top toolbar.



A **Change Status** window will appear. Select **Ready for Review (REVIEW)** from the New Status dropdown menu and click on the **OK** button.



Route job package to AFSD for review.

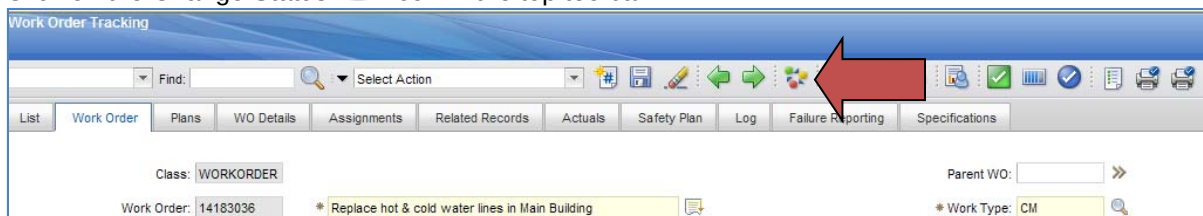
15. **AFSD REVIEW THE PLANNED JOB, CHANGE STATUS OF WORK ORDER TO FUNDED (FUNDED) AND RETURN JOB PACKAGE TO CPM**

The AFSD or Designee performs these functions.

Review the Planned Job package. If approve, change the status of the work to **Funded (FUNDED)** and proceed to the next step. If not, return the Planned Job Package back to the CPM for adjustments.

Change work order status to Funded (FUNDED)

Click on the Change Status  icon in the top toolbar.





A **Change Status** window will appear. Select **Funded (FUNDED)** from the New Status dropdown menu and click on the **OK** button.

The screenshot shows the 'Change Status' window. It contains the following fields and controls:

- Work Order: 14183036
- Replace hot & cold water lines in Main Building
- Status: REVIEW
- Ready for Review (REVIEW)
- * New Status: Funded (FUNDED) (indicated by a red arrow)
- * Status Date: 5/24/13 12:33 PM
- Memo: (empty text box)
- Print Work Order(s)? ☐
- Change work order status in back ground? ☐
- Notification E-mail for Work Order Change Status: danny.lu@lausd.net
- OK button (indicated by a red arrow)

Return Job Package to the CPM.

16. CPM ROUTES JOB PACKAGE TO THE LEAD CRAFT
17. LEAD CRAFT DISTRIBUTES THE SUB LABOR GROUP PACKAGES (IF APPLICABLE)
18. THE SCHEDULED START/FINISH DATES WILL BE DETERMINED IN THE AREA BOOK MEETING
19. LEAD CRAFT CHANGE THE STATUS TO WORK ORDER SCHEDULED (SCH) AND INSERT BOTH SCHEDULED START/FINISH DATES

The Lead Planner or Designee performs these functions.

Insert the **Scheduled Start/Finish** date to the work order.

The screenshot shows the 'Scheduling Information' window, which is divided into two main sections: 'Start' and 'Finish'.

Start Section:

- Target Start: 7/1/13 12:00 AM
- Scheduled Start: 7/5/13 12:00 AM
- Actual Start: (empty)
- Start No Earlier Than: (empty)

Finish Section:

- Target Finish: 9/1/13 12:00 AM
- Scheduled Finish: 8/31/13 12:00 AM
- Actual Finish: (empty)
- Finish No Later Than: (empty)

Change work order status to Scheduled (SCH)

Click on the Change Status  icon in the top toolbar.

The screenshot shows the 'Work Order Tracking' window. It features a top toolbar with various icons, including the 'Change Status' icon (indicated by a red arrow). Below the toolbar is a tabbed interface with tabs for List, Work Order, Plans, WO Details, Assignments, Related Records, Actuals, Safety Plan, Log, Failure Reporting, and Specifications. The 'Work Order' tab is selected, showing the following information:

- Class: WORKORDER
- Parent WO: (empty)
- Work Order: 14183036
- * Replace hot & cold water lines in Main Building
- * Work Type: CM



A **Change Status** window will appear. Select **Scheduled (SCH)** from the New Status dropdown menu and click on the **OK** button.

Change Status

Work Order: 14183036 Replace hot & cold water lines in Main Building

Status: FUNDED Funded (FUNDED)

* New Status: Scheduled (SCH)

* Status Date: 5/24/13 12:39 PM

Memo:

Print Work Order(s)? ☐

Change work order status in back ground? ☐

Notification E-mail for Work Order Change Status: danny.lu@lausd.net

OK

20. WORK COMMENCES, FIRST CRAFT CHANGE STATUS OF THE WORK ORDER TO IN PROGRESS (INPRG)

The First Craft on the Job performs this function.

Change work order status to In Progress (INPRG)

Click on the Change Status  icon in the top toolbar.

Work Order Tracking

Find: Select Action

List Work Order Plans WO Details Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Class: WORKORDER Parent WO: >>

Work Order: 14183036 Replace hot & cold water lines in Main Building Work Type: CM

A **Change Status** window will appear. Select **In Progress (INPRG)** from the New Status dropdown menu and click on the **OK** button.

Change Status

Work Order: 14183036 Replace hot & cold water lines in Main Building

Status: SCH Scheduled (SCH)

* New Status: In Progress (IN)

* Status Date: 5/24/13 12:42 PM

Memo:

Print Work Order(s)? ☐

Change work order status in back ground? ☐

Notification E-mail for Work Order Change Status: danny.lu@lausd.net

OK



21. WORK COMPLETE, LEAD LABOR GROUP INSERT ACTUAL FINISH DATE ON WORK ORDER AND CHANGE WORK ORDER STATUS TO FIELD COMPLETE (FCOMP)

The Lead Labor Group performs these functions.

Insert the **Actual Finish** date to the work order.

The screenshot shows the 'Scheduling Information' window with two tabs: 'Start' and 'Finish'. The 'Finish' tab is selected. It contains the following fields:

- Target Finish: 9/1/13 12:00 AM
- Scheduled Finish: 8/31/13 12:00 AM
- Actual Finish: 8/27/13 (highlighted with a red arrow)
- Finish No Later Than: (empty)

Change work order status to Field Complete (FCOMP)

Click on the Change Status  icon in the top toolbar.

The screenshot shows the 'Work Order Tracking' window. The top toolbar contains various icons, and the 'Change Status' icon (a circle with four colored dots) is highlighted with a red arrow. Below the toolbar, the 'Work Order' is 14183036, and the description is 'Replace hot & cold water lines in Main Building'. The 'Work Type' is CM.

A **Change Status** window will appear. Select **Field Complete (FCOMP)** from the New Status dropdown menu and click on the **OK** button.

The screenshot shows the 'Change Status' window. It contains the following fields and options:

- Work Order: 14183036
- Description: Replace hot & cold water lines in Main Building
- Status: INPRG
- * New Status: Field Complete (highlighted with a red arrow)
- * Status Date: 5/24/13 12:48 PM
- Memo: (empty)
- Print Work Order(s)? ☐
- Change work order status in back ground? ☐
- Notification E-mail for Work Order Change Status: danny.lu@lausd.net
- OK button (highlighted with a red arrow)

22. SUB LABOR GROUP(S) RETURNS THE COMPLETED JOB PACKAGES TO THE LEAD LABOR GROUP. LEAD LABOR GROUP PROCESS ALL PAPERWORK AND CHANGE WORK ORDER STATUS TO WAITING ON INSPECTION (WINSP) AND RETURN PACKAGE TO CPM

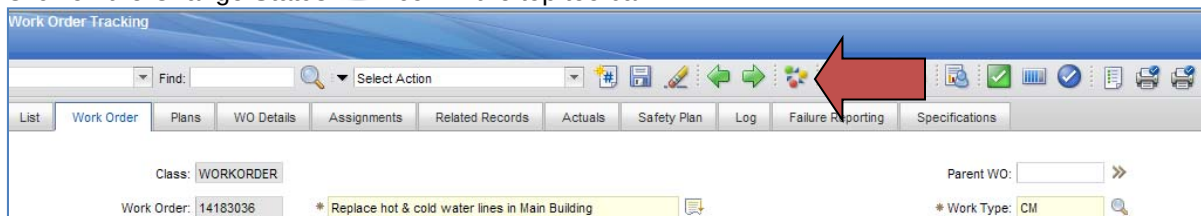
The Lead Labor Group performs these functions.



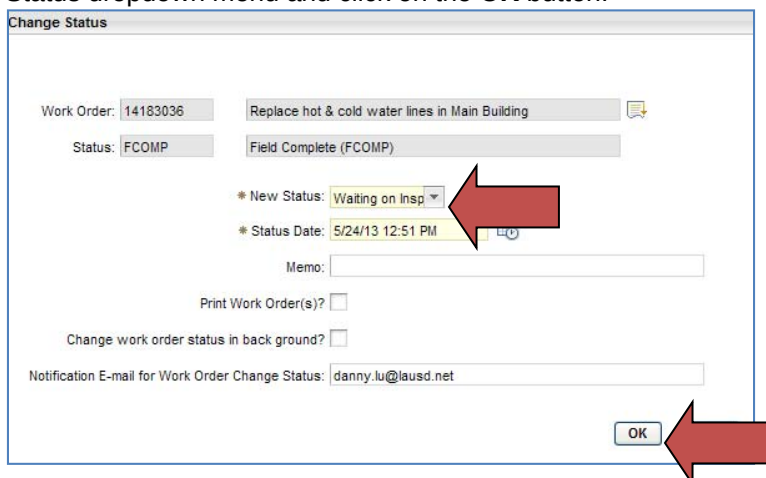
Review completed job packages, process all paperwork (purchase orders, invoices, etc...).

Change work order status to Waiting for Inspection (WINSP)

Click on the Change Status  icon in the top toolbar.



A **Change Status** window will appear. Select **Waiting for Inspection (WINSP)** from the New Status dropdown menu and click on the **OK** button.



Route completed job packages to the CPM.

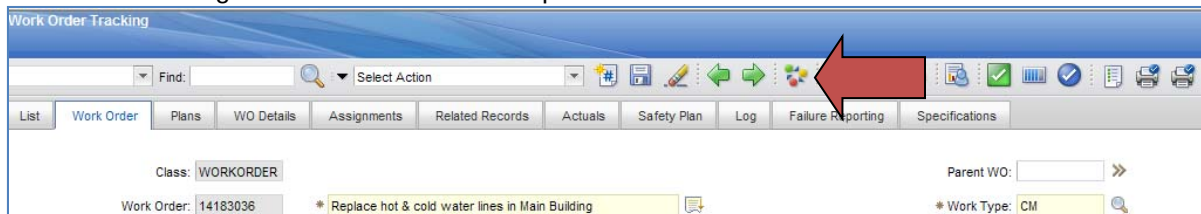
23. CPM VERIFIES THE JOB IS COMPLETE AND CHANGE THE WORK ORDER STATUS TO COMPLETE (COMP)

The CPM or Designee performs these functions.

Verify job is complete.

Change work order status to Complete (COMP)

Click on the Change Status  icon in the top toolbar.





A **Change Status** window will appear. Select **Complete (COMP)** from the New Status dropdown menu and click on the **OK** button.

Change Status

Work Order: 14183036 Replace hot & cold water lines in Main Building

Status: WINSF Waiting on Inspection (WINSF)

* New Status: Completed (CO)

* Status Date: 5/24/13 12:56 PM

Memo:

Print Work Order(s)? ☐

Change work order status in back ground? ☐

Notification E-mail for Work Order Change Status: danny.lu@lausd.net

OK

Route Job Package to Clerical Department for filing.

24. CLERICAL TO FILE PLANNED JOB IN COMPLETED JOBS FILE

Should you have any questions on this guide, please contact the Danny Lu (danny.lu@lausd.net / 213-241-7007), Mark Merrick (mark.merrick@lausd.net / 213-241-7013), or John Herweg (john.herweg@lausd.net / 213-241-7016).