



Los Angeles Unified School District  
**Maximo 7.6 / Procurement**  
**Low Value Purchase (PD) Guide**

## DEFINITION

The **Low Value Purchase (PD) Guide** is an alternative method to purchase materials and/or services not available from local M&O Area Stores, General Stores Warehouse, Master Contracts, Annual Contracts, Bench Contracts or Piggyback Contracts and that do not exceed \$25,000. The \$25,000 limit is inclusive of tax and shipping. The guide details step by step instructions on how to process Low Value Purchases (PD) in Maximo.

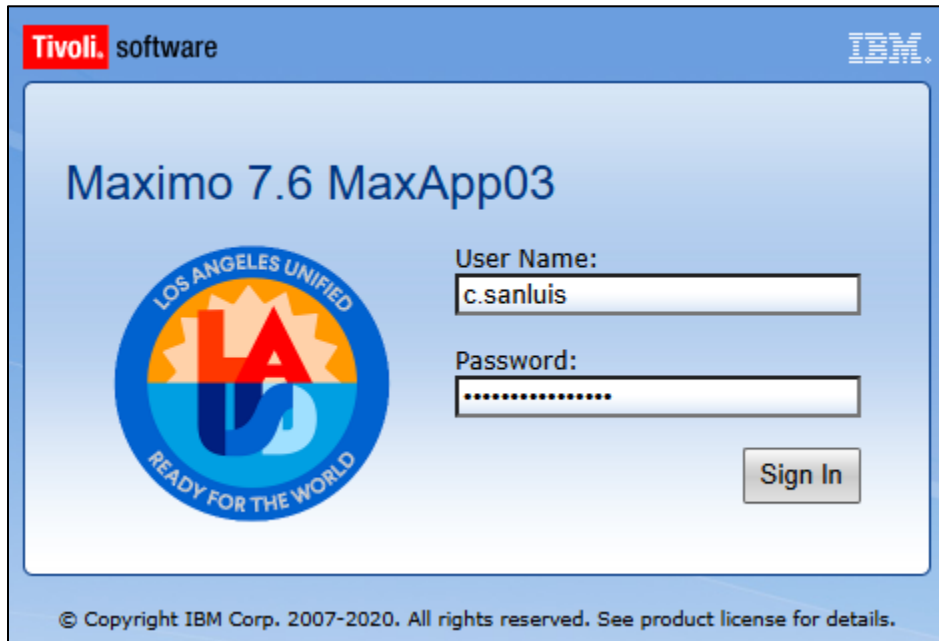
**TIP:** For Low Value Purchases, please obtain Vendor quotes prior to initiating the requisition in Maximo. Please also confirm that the Vendor has a District/SAP assigned Vendor number.

## LOGIN

*The requestor performs this function.*

To login to Maximo 7.6, please go to <http://awms.lausd.net/maximo>.

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

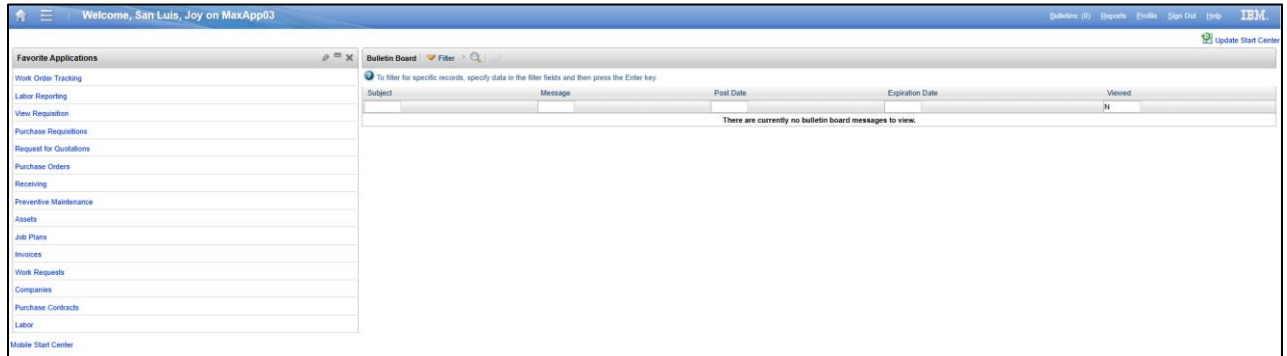


The image shows the Maximo 7.6 MaxApp03 login interface. At the top left is the Tivoli software logo, and at the top right is the IBM logo. The main title is "Maximo 7.6 MaxApp03". On the left is a circular logo for "LOS ANGELES UNIFIED" with "LA" in the center and "READY FOR THE WORLD" at the bottom. To the right of the logo are two input fields: "User Name:" with the text "c.sanluis" and "Password:" with a masked password ".....". Below the password field is a "Sign In" button. At the bottom, a copyright notice reads: "© Copyright IBM Corp. 2007-2020. All rights reserved. See product license for details."

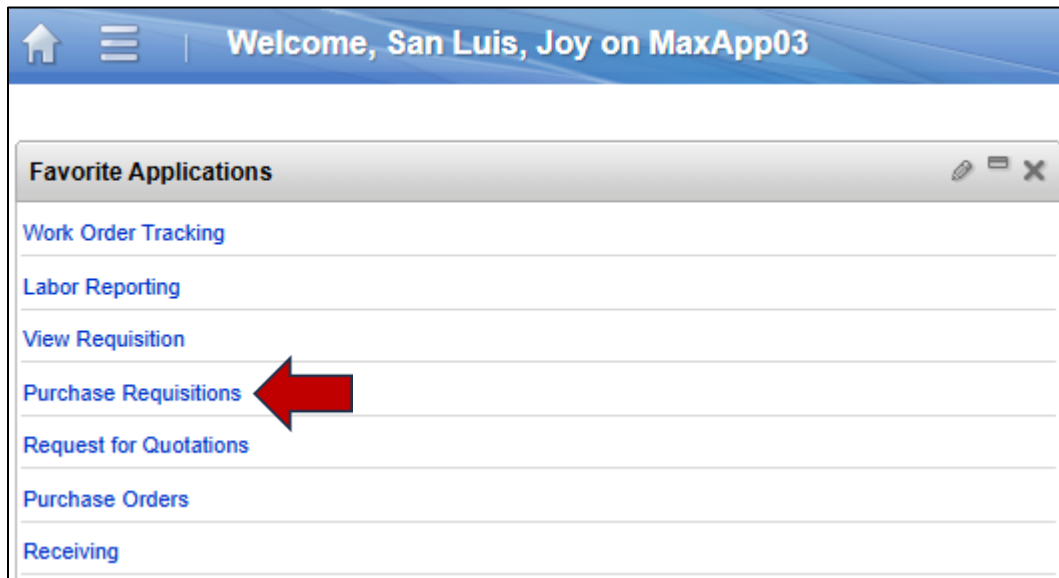
## 1. CREATE PURCHASE REQUISITION

### START CENTER

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

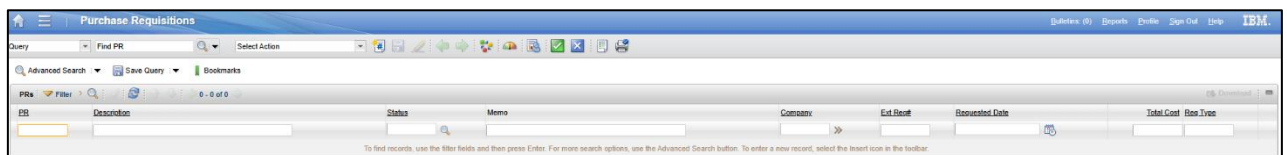


Under the Favorite Applications section, click on the **Purchase Requisitions** application.



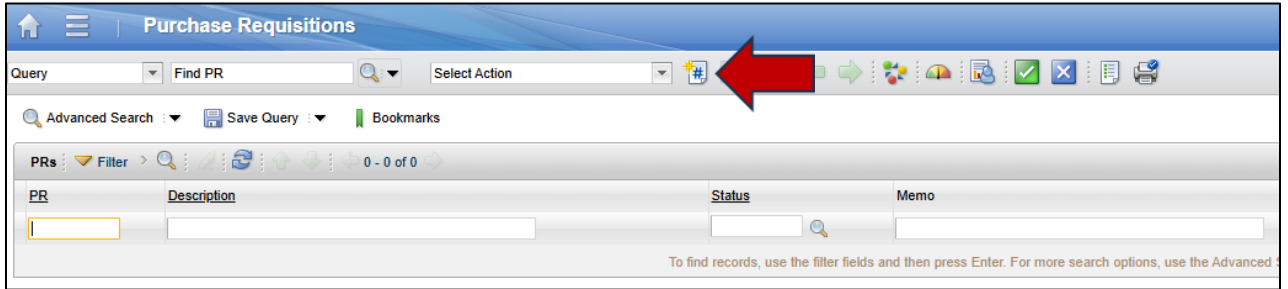
### PURCHASE REQUISITIONS HOME

You will then be taken to the Purchase Requisitions home screen; in this screen, you can search for existing Purchase Requisition records.



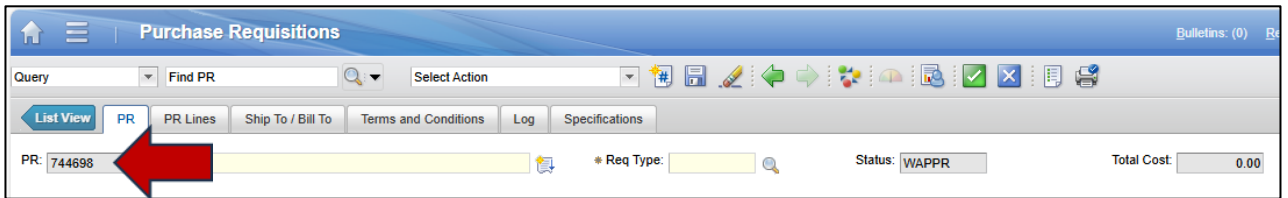
## NEW PURCHASE REQUISITION

Click on the  icon to create a new Purchase Requisition.



The screenshot shows the 'Purchase Requisitions' header with a search bar and a toolbar. A red arrow points to the 'New' icon in the toolbar. Below the header, there are tabs for 'PRs', 'Filter', and 'Advanced Search'. The main area has fields for 'PR', 'Description', 'Status', and 'Memo'. A red arrow points to the 'New' icon in the toolbar.

A new **Purchase Requisition** number will auto generate.

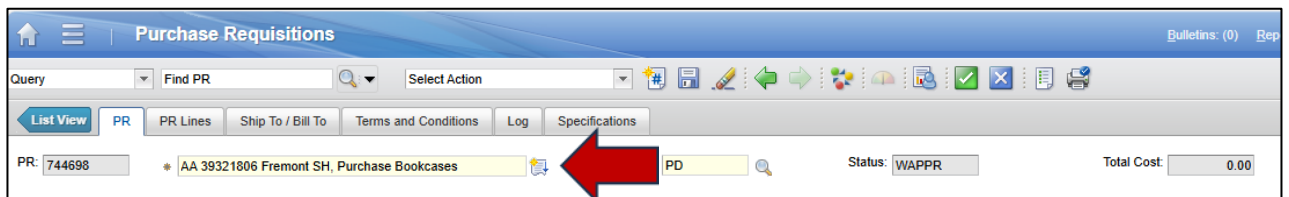


The screenshot shows the 'Purchase Requisitions' screen with a new requisition. The 'PR' field is highlighted with a red arrow. The 'Description' field contains the text 'AA 39321806 Fremont SH, Purchase Bookcases'. The 'Status' is 'WAPPR' and the 'Total Cost' is '0.00'.

In the **Description** field, use the following naming convention: 2 Letter Craft Code (space) Work Order Number (space) School Site (i.e., AA 14183033 Fremont SH).

If you would like to add an additional comment to the Description field, separate the additional comment from the naming convention by a comma, and type your additional comment directly into the Description field (i.e., AA 14183033 Fremont SH, Replace Doors).

Click on the **Long Description**  icon to add any special instructions for the PR. Type '**Special Instructions**' and all the text that follows will print in the Special Instructions section of the Quote Sheet.



The screenshot shows the 'Purchase Requisitions' screen with the 'Long Description' field. A red arrow points to the 'Long Description' icon. The 'PR' field is '744698' and the 'Description' field contains 'AA 39321806 Fremont SH, Purchase Bookcases'. The 'Status' is 'WAPPR' and the 'Total Cost' is '0.00'.

Fill in the following fields:

**PR Type** Type **PD** or click on the **magnifying glass**  icon next to the **PO Type** field and select **PD (Low Value Purchase Order)**.

**Priority** Enter a **Priority Number** for your Purchase Requisition (3 being Standard and 5 being Urgent)

**Requested By** The **Requested By** field will auto-populate based on your Maximo login. If you would like to change the requestor, type in the employee number of the new requestor or use the magnifying glass  icon to select from a list.

**NOTE:** The employee listed as the **Requested By** field will receive an email if the SAP Interface to create a PO number was successful or failed.

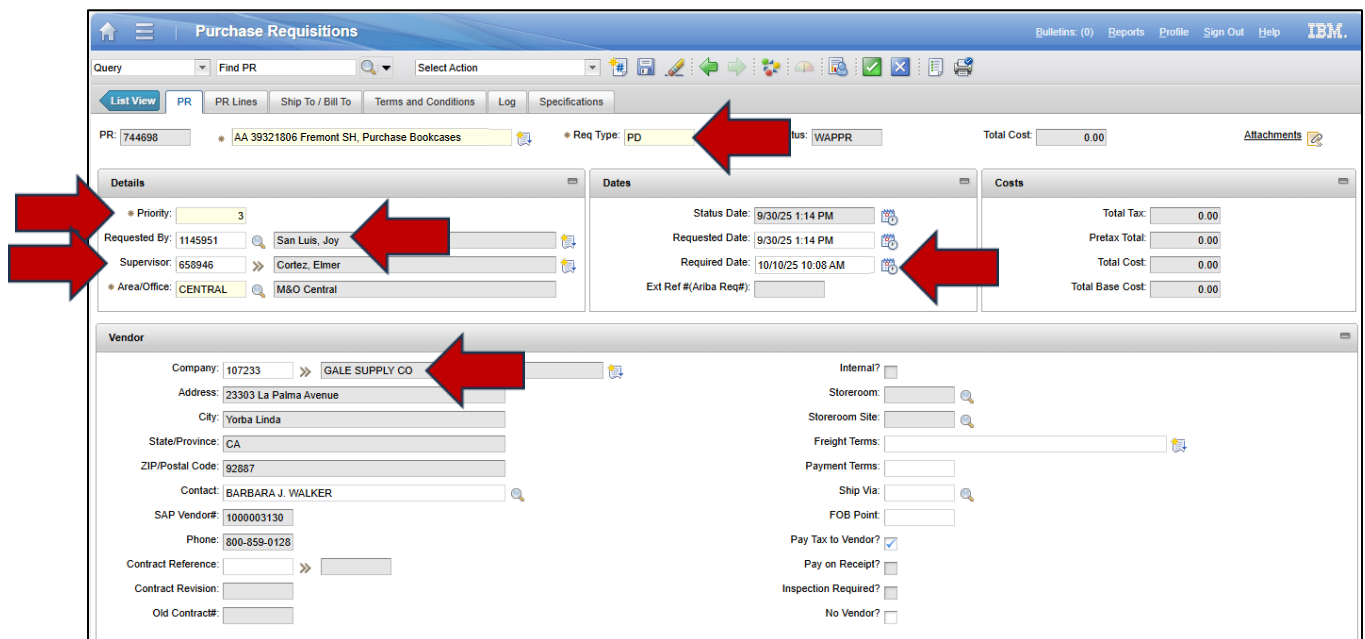
**Supervisor** Enter the **employee number** of your supervisor or search for it by clicking on the  icon and selecting **Select Value**.

**Required Date** Enter the **date** you would like your purchase delivered.

**Company** Enter the **vendor number** of the company whom you wish to purchase the supplies/services. If a vendor number is not available, please contact your clerical staff to create a temporary vendor number. You may also search for the vendor number by clicking on the  icon and searching for it in the **Companies** application.

**NOTE:** You can only select a vendor with an **SAP Vendor#**. Vendors without a SAP Vendor # will reject in the SAP interface. Vendors with a “V” in the T column signify that they are registered with Ariba.

Sample screenshot:



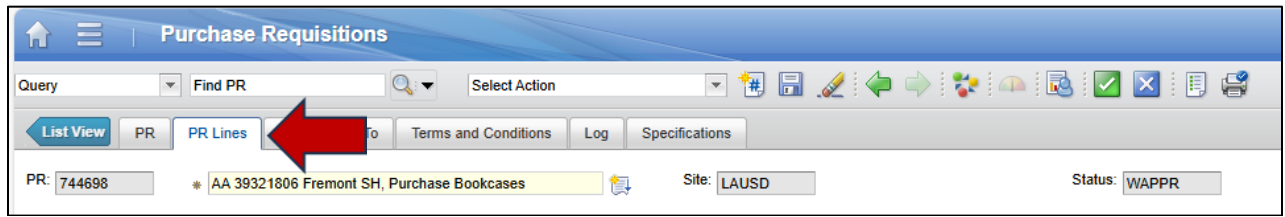
The screenshot displays the 'Purchase Requisitions' form in Maximo. The form is divided into several sections: 'Details', 'Dates', 'Costs', and 'Vendor'. Red arrows highlight the following fields:

- Details:**
  - Priority: 3
  - Requested By: San Luis, Joy
  - Supervisor: Cortez, Elmer
  - Area/Office: CENTRAL
- Dates:**
  - Req Type: PD
  - Status Date: 9/30/25 1:14 PM
  - Requested Date: 9/30/25 1:14 PM
  - Required Date: 10/10/25 10:08 AM
- Costs:**
  - Total Tax: 0.00
  - Pretax Total: 0.00
  - Total Cost: 0.00
  - Total Base Cost: 0.00
- Vendor:**
  - Company: 107233 GALE SUPPLY CO
  - Address: 23303 La Palma Avenue
  - City: Yorba Linda
  - State/Province: CA
  - ZIP/Postal Code: 92887
  - Contact: BARBARA J. WALKER
  - SAP Vendor#: 1000003130
  - Phone: 800-859-0128
  - Contract Reference:
  - Contract Revision:
  - Old Contract#:

To save, click on the floppy disk .

## 2. CREATE PR LINE ITEMS

Click on the **PR Lines** tab.



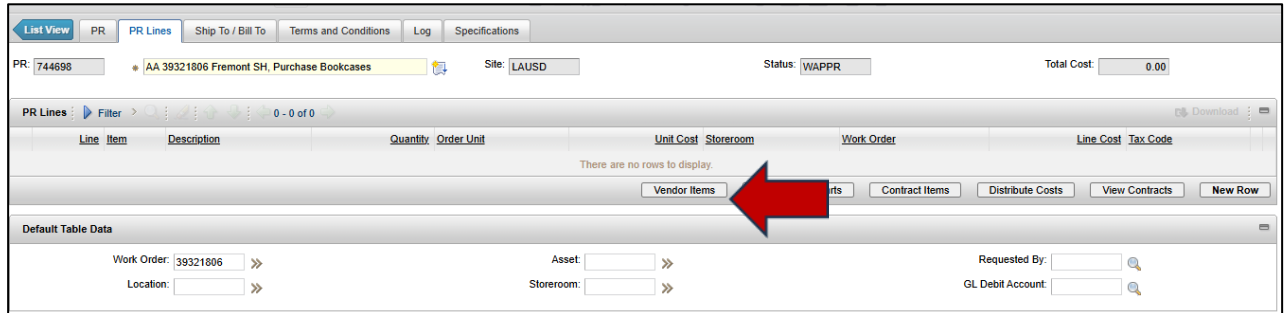
Prior to creating the PR Lines, under the **Default Table Data** section, you have an option to pre-fill the **Work Order** number. If pre-filled, all new rows will auto-populate with the Work Order number.



There are two ways to add lines to your PR.

### OPTION 1: Vendor Items Button

If you click on the **Vendor Items** button, a new window will appear with a value list of all items M&O have ordered from this Vendor in Maximo.



Check the boxes of the item number(s) you wish to bring over as **PR Lines**. Click on the **OK** button when done.

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**Vendor Items**

Vendor Items Filter 76 - 90 of 105 Download

| <input type="checkbox"/> Item                  | Item Type | Description                                               | Manufacturer | Quantity | Model   | Catalog # | Order Unit | Last Price |
|------------------------------------------------|-----------|-----------------------------------------------------------|--------------|----------|---------|-----------|------------|------------|
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis | BOBRICK      |          |         | B 2112    | EA         | 30.30      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis | BOBRICK      |          |         | B2111     | EA         | 26.25      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis |              |          | #B-2112 |           | EA         | 25.65      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis |              |          | BOBRICK |           | EA         | 27.00      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis | 4854411100   |          |         |           | EA         | 28.85      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis |              |          |         |           | EA         | 30.00      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis | BOBRICK      |          | B-2112  |           | EA         | 28.85      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis | 4854411000   |          |         |           | EA         | 28.85      |
| <input type="checkbox"/> 4854400000            | ITEM      | Dispensers, Lotion and Soap (Including Waterless Soap Dis | BOBRICK      |          | BOB2112 |           | EA         | 30.00      |
| <input type="checkbox"/> 6652417360            | ITEM      | BAG, PLASTIC, CLEAR, 6 MIL 33" X 50"                      |              |          |         | TRM-612C  | EA         | 0.92       |
| <input type="checkbox"/> 6652417360            | ITEM      | BAG, PLASTIC, CLEAR, 6 MIL 33" X 50"                      |              |          |         |           | EA         | 0.92       |
| <input type="checkbox"/> 2852300000            | ITEM      | REGAL PRODUCTS, MYERS PRODUCTS (CONDUIT FITT              | BOBRICK      |          |         | B2112     | EA         | 30.30      |
| <input checked="" type="checkbox"/> 9998000120 | ITEM      | SHIPPING, DELIVERY OR FREIGHT CHARGE                      |              |          |         |           | EA         | 2.75       |
| <input checked="" type="checkbox"/> 9990000000 | ITEM      | MISCELLANEOUS CHARGES (ALL KINDS) (Tax Exempt)            |              |          |         |           | EA         | 2.75       |
| <input type="checkbox"/> 4854672200            | ITEM      | DISPENSER, TOILET PAPER, SGL FOLD, SST                    |              |          |         |           | EA         | 103.00     |

OK Cancel

This will create a new row for each Item number you selected. Here you can modify the **Description**, **Quantity**, **Order Unit**, **Unit Cost** and **Tax** to match the vendor quote.

**PR Lines**

PR: 744698 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: WAPPR Total Cost: 24.32

PR Lines Filter 3 of 3

| Line | Item       | Description                                    | Quantity | Order Unit | Unit Cost | Storeroom | Work Order | Line Cost | Tax Code |
|------|------------|------------------------------------------------|----------|------------|-----------|-----------|------------|-----------|----------|
| 3    | 6300000000 | PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAPER | 1.00     | EA         | 17.15     |           | 39321806   | 17.15     | 9.75     |
| 2    | 9990000000 | MISCELLANEOUS CHARGES (ALL KINDS) (Tax Exempt) | 1.00     | EA         | 2.75      |           | 39321806   | 2.75      |          |
| 1    | 9998000120 | SHIPPING, DELIVERY OR FREIGHT CHARGE           | 1.00     | EA         | 2.75      |           | 39321806   | 2.75      |          |

Vendor Items Select Spare Parts Contract Items Distribute Costs View Contracts New Row

### OPTION 2: New Row Button

To create a new row, click on the **New Row** button on the right-hand side of the **PR Lines** subsection.

**PR Lines**

PR: 744698 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: WAPPR Total Cost: 0.00

PR Lines Filter 0 - 0 of 0

There are no rows to display.

Vendor Items Select Spare Parts Contract Items Distribute Costs View Contracts New Row

**Default Table Data**

Work Order: 39321806 Asset: Storeroom: Requested By: GL Debit Account:

Enter the **Commodity Code** number in the **Item** field. Modify the default description to provide more accurate information. You may also use the **Long Description**, **Manufacturer**, and **Model** fields to provide more detailed information.

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The screenshot displays the 'Purchase Requisitions' interface in Maximo. At the top, there's a navigation bar with 'List View', 'PR', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', 'Log', and 'Specifications'. Below this, a summary bar shows 'PR: 744698', 'AA 39321806 Fremont SH, Purchase Bookcases', 'Site: LAUSD', 'Status: WAPPR', and 'Total Cost: 24.32'.

The 'PR Lines' section shows a table with 4 lines. Line 4 is selected, showing 'Bookcases 4' X 8'' with a quantity of 1.00 and a unit cost of 0.00. Below the table, the 'Line Item' details are shown, including 'Item: 4250300000', 'Line Type: Item', 'PR Line #: 4', and 'Remarks'. To the right, there are fields for 'Manufacturer: 107233', 'Model: A123', 'Category: STK', 'Catalog #', 'Commodity Group: 42500', and 'Commodity Code'. On the far right, there are checkboxes for 'Receipt Required?', 'Inspection Required?', 'Issue on Receipt?', 'Charge to Store?', 'Distributed?', 'Tax Exempt?', and 'Copy to RFQ?'.

Red arrows point to the 'Item' field, the 'Line Type' dropdown, the 'PR Line #' field, and the 'Commodity Group' field.

If you do not know the **Commodity Code** number, you may search for it by clicking on the  icon (to the right of the Item field) and click on **Select Value**.

This screenshot shows the 'Line Item' details section of the Maximo interface. The 'Item' field is highlighted, and a dropdown menu is open, showing options: 'Select Value', 'Classification', 'Attributes', 'Go To', 'View Item Availability', and 'View Image'. Red arrows point to the 'Select Value' option and the 'Item' field.

A pop-up window will appear with a list of Items in Maximo. Here, you may search for your item in the second **Description** column. To select an Item number, click on the **Item Number** or the **Description**. This will help ensure that we calculate the full, correct amount (including tax) for the item.

**NOTE:** The item number you select must have a **Commodity Group** number in order for the PO to be created in Ariba/SAP.

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Select Value

Filter > 261 - 280 of 517

| Item       | Description                                                                    | Commodity Group | Description              | Commodity Code | Cost Element | Tax Exempt?              |
|------------|--------------------------------------------------------------------------------|-----------------|--------------------------|----------------|--------------|--------------------------|
|            |                                                                                |                 | furniture                |                |              |                          |
| 4259410032 | PANEL, ENHANCED, TACKABLE ACOUSTICAL, 35x53 - 9TT5335                          | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410033 | PANEL, ENHANCED, TACKABLE ACOUSTICAL, 30x53 - 9TT5330                          | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410034 | PANEL, PWR, ENHANCED, TACKABLE, ACOUSTICAL, 3 CIRCT, 36X65                     | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410042 | WORKSURFACE, STRAIGHT, LAMINATE, 30x35                                         | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410046 | <b>DRAWER, CTR, 21x22</b>                                                      | 42500           | <b>FURNITURE: OFFICE</b> |                | 430003       | <input type="checkbox"/> |
| 4259410047 | BIN, OVERHEAD, 1 DOOR, LOCK, 14-7/8x42                                         | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410048 | BIN, OVERHEAD, 1 DOOR, LOCK, 14-7/8x36                                         | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410050 | LATERAL, 2 DRAWER, LAMINATE                                                    | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410054 | WORKSURFACE, STRAIGHT, LAMINATE, 25X25                                         | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410058 | WORKSURFACE, CORNERSTONE, LAM, DOUBLE BULLNOSE, 25X45                          | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410062 | BIN, OVERHEAD, 2 DOORS, LOCK, 14-7/8x60                                        | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410066 | PANEL, ENHANCED, TACKABLE, ACOUSTICAL, 30x42                                   | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410070 | WORKSURFACE, STRAIGHT, LAMINATE, 25X25"                                        | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410074 | PANEL, PWR, ENHANCED, TACKABLE, RAD, 35X65                                     | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410078 | BIN, OVERHEAD, 1 DOOR, LOCK, 14-7/8x25"                                        | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410081 | PANEL, ENHANCED, TACKABLE, ACOUSTICAL, 35x42                                   | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410082 | PANEL, PWR, ENHANCED, TACKABLE, ACOUSTICAL, 35x42                              | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410083 | PANEL, ENHANCED, TACKABLE ACOUSTICAL, 25x53                                    | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410084 | PANEL, ENHANCED, TACKABLE ACOUSTICAL, 60x53                                    | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |
| 4259410085 | PANEL, PWR, ENHANCED, TACKABLE, ACOUSTICAL, 4 CIRCT, S, I2, 30x75 - 9TT7530_p4 | 42500           | FURNITURE: OFFICE        |                | 430003       | <input type="checkbox"/> |

Cancel

After you click on the **Item Number** or the **Description**, the item number will be returned to the **Item** field. Type over the default description to provide an item name. Using the **Long Description**, **Manufacturer**, and **Model** fields, will allow you to add specifications.

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

PR: 744698 \* AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD

PR Lines Filter > 1 - 4 of 4

| Line | Item       | Description                                    |
|------|------------|------------------------------------------------|
| 3    | 6300000000 | PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAPER |
| 2    | 9990000000 | MISCELLANEOUS CHARGES (ALL KINDS) (Tax Exempt) |
| 1    | 9998000120 | SHIPPING, DELIVERY OR FREIGHT CHARGE           |
| 4    | 4259410046 | DRAWER, CTR, 21x22                             |

Line Item

Item: 4259410046 >> DRAWER, CTR, 21x22

Line Type: Item

PR Line #: 4

Remarks:

Update the **Quantity**, **Order Unit**, **Unit Cost**, and **Work Order** number if necessary.

**Quantity and Costs**

Quantity: 1.00  
 \* Order Unit: EA  
 Issue Unit:  
 Conversion Factor: 1.00  
 Unit Cost: 150.00  
 Line Cost: 150.00  
 Reservation Type: Automatic

Tax Code: 9.75  
 Tax: 14.63  
 Loaded Cost: 164.63  
 Contract Reference:  
 Contract Reference Revision:  
 Contract Line Reference:  
 LineID for Contract Item:

**Charge To**

Storeroom:  
 Work Order: 39321806  
 WO Status: COMP  
 Location: B-22870  
 Asset:  
 GL Debit Account: 10:307001887101  
 PR Contract #:  
 PR Contract Rev:

Click on the floppy disk icon to save. If you have additional lines, click on the **New Row** button and repeat steps.

### 3. ENTER SHIP TO / BILL TO INFORMATION

Click on the **Ship To / Bill To** tab.

**Purchase Requisitions**

Query: Find PR  
 Select Action

PR: 744698 \* AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: WAPPR Total Cost: 188.95

**Ship To**

\* Ship To: 8650 FREMONT HS  
 Address: 7676 S SAN PEDRO ST  
 City: LOS ANGELES  
 State/Province: CA  
 ZIP/Postal Code: 90003  
 Attention:

**Bill To**

\* Bill To: 0640 M&O CENTRAL OFFICE  
 Address: 333 S BEAUDRY AVENUE, 22ND FLOOR  
 City: LOS ANGELES  
 State/Province: CA  
 ZIP/Postal Code: 90017  
 Attention:

- **Ship To a M&O Area:**
  - Select / enter your M&O Area's section code in the **Ship To** field.
  - Enter the requestor's employee number in the **Attention** field.

**Purchase Requisitions**

Query: Find PR  
 Select Action

PR: 744698 \* AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD

**Ship To**

\* Ship To: 1429 M&O MAINTENANCE NORTH 1  
 Address: 6651-B BALBOA BLVD  
 City: VAN NUYS  
 State/Province: CA  
 ZIP/Postal Code: 91406  
 Attention: 1145951 San Luis, Joy

- **Ship To a School:**
  - Select / enter the school's section code in the **Ship To** field.
  - Enter the requestor's employee number in the **Attention** field.

The screenshot shows the 'Purchase Requisitions' interface. At the top, there's a header with a home icon, a menu icon, and the title 'Purchase Requisitions'. Below this is a search bar with 'Query' and 'Find PR' buttons, and a 'Select Action' dropdown. A navigation bar contains buttons for 'List View', 'PR', 'PR Lines', 'Ship To / Bill To' (which is highlighted), 'Terms and Conditions', 'Log', and 'Specifications'. The main content area shows a requisition for 'PR: 744698' with the description '\* AA 39321806 Fremont SH, Purchase Bookcases' and 'Site: LAUSD'. A 'Ship To' section is expanded, showing fields for 'Ship To' (8650), 'Address' (7676 S SAN PEDRO ST), 'City' (LOS ANGELES), 'State/Province' (CA), 'ZIP/Postal Code' (90003), and 'Attention' (1145951). Red arrows point to the 'Ship To' and 'Attention' fields, indicating where to enter the school's section code and the requestor's employee number, respectively.

- **Ship To - Will Call:**
  - Enter WC in the **Ship To** field
  - **Requirements for Will Call:**
    - **WILL CALL SHOULD ONLY BE USED FOR EMERGENCIES**
    - Only an AFSD can approve a Will Call requisition
    - The person who picks up the material(s) must print their name and sign the packing / pick-up slip.
    - They must take a picture, at pickup, of the material(s) using a District issued device.
    - Material(s) must be installed / used within 48 hours +/- after it is picked up.
    - After installation, a photo must be taken of the installed material and attached to the work order

**Purchase Requisitions**

Query: Find PR [ ] Select Action [ ]

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

PR: 744698 \* AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD

**Ship To**

\* Ship To: WC WILL CALL

Address: [ ]

City: [ ]

State/Province: [ ]

ZIP/Postal Code: [ ]

Attention: 1145951 San Luis, Joy

- **Bill To:**
  - Select / enter your M&O Area's section code in the **Bill To** field. Enter the requestor's employee number in the **Attention** field.

Status: WAPPR Total Cost: 188.53

**Bill To**

\* Bill To: 0640 M&O CENTRAL OFFICE

Address: 333 S BEAUDRY AVENUE, 22ND FLOOR

City: LOS ANGELES

State/Province: CA

ZIP/Postal Code: 90017

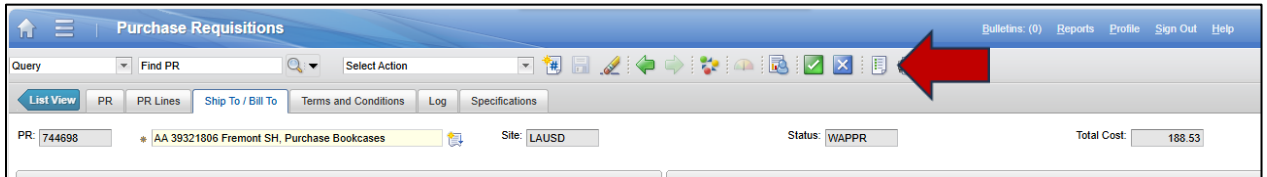
Attention: 1145951 San Luis, Joy

- **Issues:**
  - If the section is missing or has incorrect information, please contact the Maximo Team at [MaximoTeam@laschools.net](mailto:MaximoTeam@laschools.net).

Click on the floppy disk  icon to save.

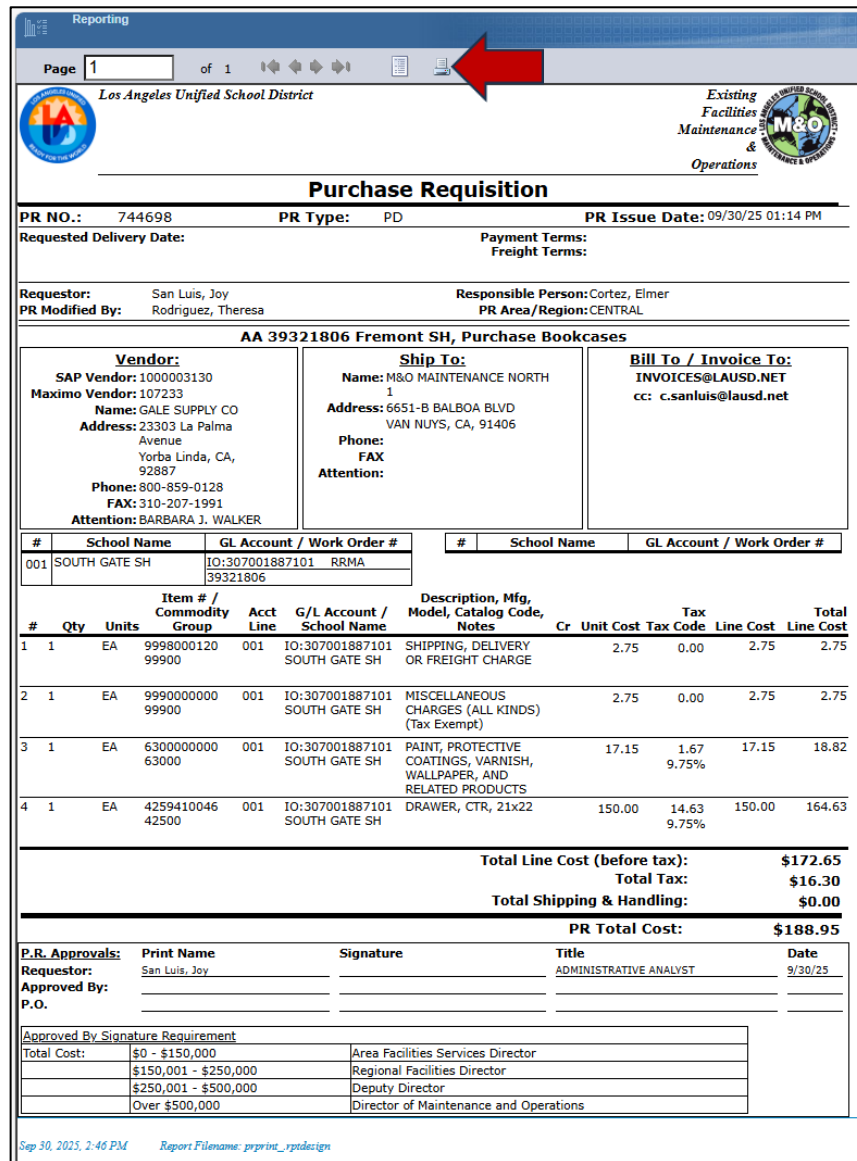
#### 4. PRINT THE PURCHASE REQUISITION REPORT

Click on the **Purchase Requisition Report**  icon located on the top toolbar to view the report.



The screenshot shows the 'Purchase Requisitions' window. The top toolbar contains various icons, including a printer icon. A red arrow points to the printer icon. Below the toolbar, there are tabs for 'List View', 'PR', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', 'Log', and 'Specifications'. The main area displays details for PR 744698, including the vendor 'AA 39321806 Fremont SH, Purchase Bookcases', the site 'LAUSD', and the status 'WAPPR'. The total cost is listed as 188.53.

A new **BIRT Report Viewer** window will appear. Review the report and click on the printer  icon to print the document.



The screenshot shows the 'Reporting' window with the 'Purchase Requisition' report. The report header includes the Los Angeles Unified School District logo and the title 'Purchase Requisition'. The report details include the PR number (744698), PR type (PD), PR issue date (09/30/25 01:14 PM), and the requester (San Luis, Joy). The report also includes a table of items with columns for Item #, Qty, Units, Item # / Commodity Group, Acct Line, G/L Account / School Name, Description, Mfg. Model, Catalog Code, Notes, Cr, Unit Cost, Tax Code, Line Cost, and Total Line Cost. The total line cost is \$172.65, total tax is \$16.30, and total shipping and handling is \$0.00, resulting in a PR total cost of \$188.95. The report footer includes the date 'Sep 30, 2025, 2:45 PM' and the report filename 'prprint\_rptdesign'.

| #                                     | Qty | Units | Item # / Commodity Group | Acct Line | G/L Account / School Name     | Description, Mfg. Model, Catalog Code, Notes                         | Cr | Unit Cost | Tax Code    | Line Cost       | Total Line Cost |
|---------------------------------------|-----|-------|--------------------------|-----------|-------------------------------|----------------------------------------------------------------------|----|-----------|-------------|-----------------|-----------------|
| 1                                     | 1   | EA    | 9998000120 99900         | 001       | IO:307001887101 SOUTH GATE SH | SHIPPING, DELIVERY OR FREIGHT CHARGE                                 |    | 2.75      | 0.00        | 2.75            | 2.75            |
| 2                                     | 1   | EA    | 9990000000 99900         | 001       | IO:307001887101 SOUTH GATE SH | MISCELLANEOUS CHARGES (ALL KINDS) (Tax Exempt)                       |    | 2.75      | 0.00        | 2.75            | 2.75            |
| 3                                     | 1   | EA    | 6300000000 63000         | 001       | IO:307001887101 SOUTH GATE SH | PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAPER, AND RELATED PRODUCTS |    | 17.15     | 1.67 9.75%  | 17.15           | 18.82           |
| 4                                     | 1   | EA    | 4259410046 42500         | 001       | IO:307001887101 SOUTH GATE SH | DRAWER, CTR, 21x22                                                   |    | 150.00    | 14.63 9.75% | 150.00          | 164.63          |
| <b>Total Line Cost (before tax):</b>  |     |       |                          |           |                               |                                                                      |    |           |             | <b>\$172.65</b> |                 |
| <b>Total Tax:</b>                     |     |       |                          |           |                               |                                                                      |    |           |             | <b>\$16.30</b>  |                 |
| <b>Total Shipping &amp; Handling:</b> |     |       |                          |           |                               |                                                                      |    |           |             | <b>\$0.00</b>   |                 |
| <b>PR Total Cost:</b>                 |     |       |                          |           |                               |                                                                      |    |           |             | <b>\$188.95</b> |                 |

**P.R. Approvals:**

| Print Name               | Signature | Title                  | Date    |
|--------------------------|-----------|------------------------|---------|
| Requestor: San Luis, Joy |           | ADMINISTRATIVE ANALYST | 9/30/25 |
| Approved By:             |           |                        |         |
| P.O.                     |           |                        |         |

**Approved By Signature Requirement**

| Total Cost:           | Signature Requirement                  |
|-----------------------|----------------------------------------|
| \$0 - \$150,000       | Area Facilities Services Director      |
| \$150,001 - \$250,000 | Regional Facilities Director           |
| \$250,001 - \$500,000 | Deputy Director                        |
| Over \$500,000        | Director of Maintenance and Operations |

Sep 30, 2025, 2:45 PM Report Filename: prprint\_rptdesign

The Requestor is responsible for signing the **Requestor** line. Then, the Requestor must obtain the required signature in the **Approved By** field. The **Approver** must verify that the vendor quote and PR

lines match prior to approving the requisition. The **Approved By** signature is determined by the Dollar amount of the requisition:

|                        |                       |
|------------------------|-----------------------|
| <b>AFSD</b>            | \$0 - \$150,000       |
| <b>RDF</b>             | \$150,001 - \$250,000 |
| <b>Deputy Director</b> | \$250,001 - \$500,000 |
| <b>Director</b>        | \$500,001+            |

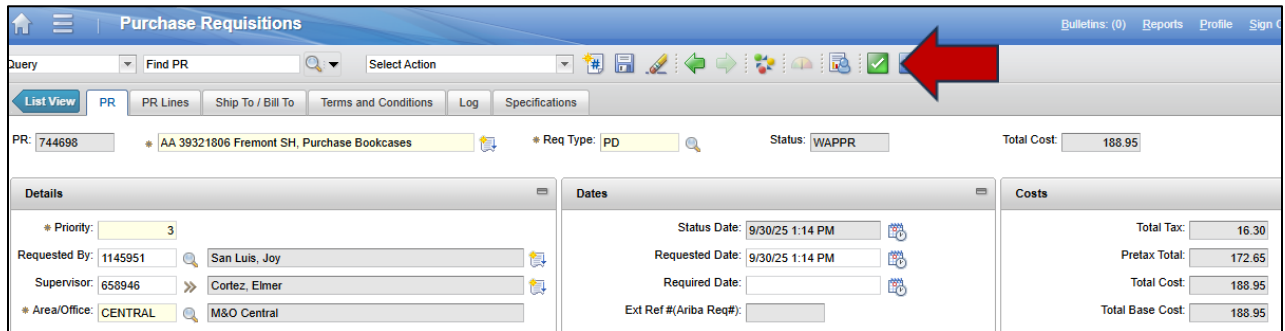
Submit the signed **Purchase Requisition** report to **Clerical** for processing.

## 5. CREATE PURCHASE ORDER

*The Clerical department performs this function.*

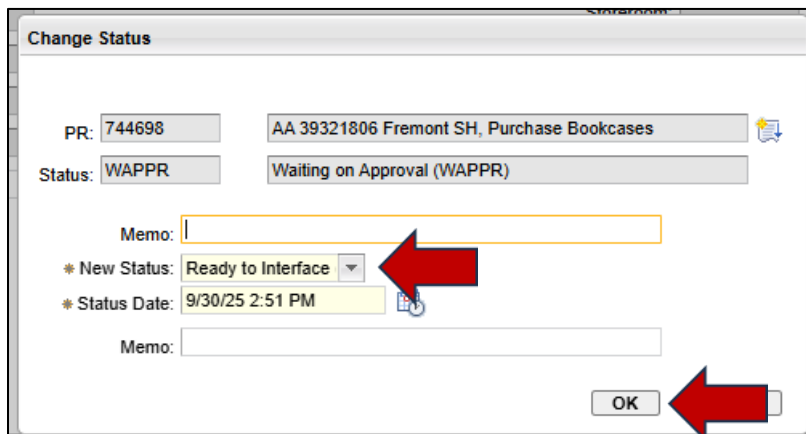
Review the **Purchase Requisition** report that was submitted to you by the Requestor. Sign on the **P.O. Line** of the report, after reviewing/checking the document for accuracy and completeness (e.g. Ariba Vendor Code appears, Work Order has G/L Account line). Attach the **Purchase Requisition Details Report** and submitted documentation to the PR. See the Document Upload Guide for steps on how to name and upload files.

On the **Purchase Requisition** record, change the status to **Ready to Interface (INTREADY)**. Click on the  icon located in the top tool bar.



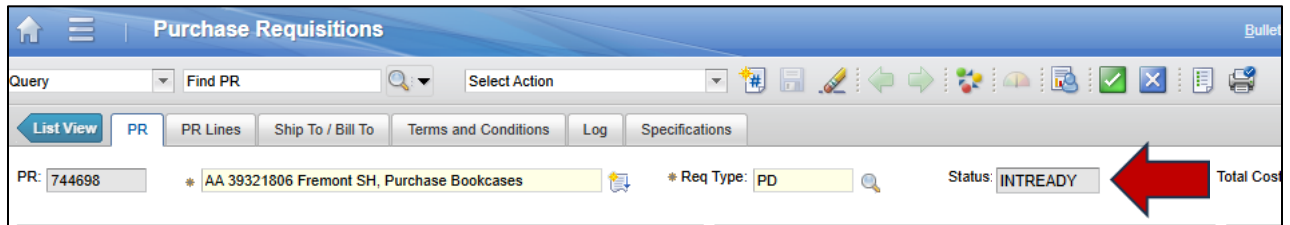
The screenshot shows the 'Purchase Requisitions' window. At the top, there is a toolbar with various icons. A red arrow points to the green checkmark icon, which is used to change the status of the requisition. Below the toolbar, the requisition details are displayed, including the PR number (744698), description (AA 39321806 Fremont SH, Purchase Bookcases), and status (WAPPR). The 'Details' tab is active, showing fields for Priority, Requested By, Supervisor, and Area/Office. The 'Dates' tab shows Status Date, Requested Date, and Required Date. The 'Costs' tab shows Total Tax, Pretax Total, Total Cost, and Total Base Cost.

The **Change Status** window will appear with **Ready to Interface (INTREADY)** selected as the **New Status**. Click on the **OK** button.



The screenshot shows the 'Change Status' window. It contains fields for PR number (744698), description (AA 39321806 Fremont SH, Purchase Bookcases), and status (WAPPR). Below these fields, there is a 'Memo' field and a 'New Status' dropdown menu. A red arrow points to the 'New Status' dropdown menu, which is currently set to 'Ready to Interface (INTREADY)'. Another red arrow points to the 'OK' button at the bottom right of the window.

The new status will be displayed on the Purchase Requisition.



## INTERFACE SCHEDULE AND STATUSES

Maximo will interface the Purchase Requisition information into Ariba to generate the PO. Ariba will assign a buyer, which will require up to 15 business days to generate a PO number, so be prepared for this delay in your process. See below for the Interface status definitions and actions.

**Ready to Interface (INTREADY)** – This status marks the PR to interface to Ariba. If your PR is in this status, you can still change the status back to **WAPPR** if you need to make changes to the PR.

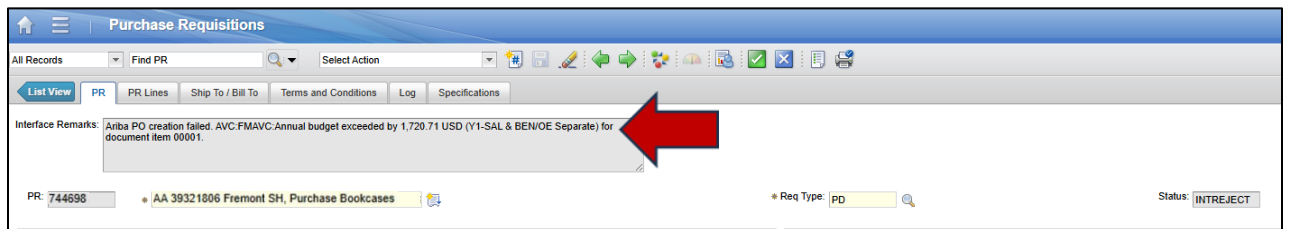
**Interface in Session (INTSESSION)** – The PR is changed to the **INTSESSION** status when it is in the process of interfacing with Ariba. When the PR is in the **INTSESSION** status, you cannot make any changes to the PR.

**Interface Rejected (INTREJECT)** – The PR completed its interface but was rejected due to any of the following reasons:

- Invalid Company
- Invalid Funding
- Invalid Commodity Code
- Invalid Unit of Measure
- Etc...

If your PR was rejected during the interface, the reason will be displayed on the PR tab.

Sample screenshot of **Reject** reason

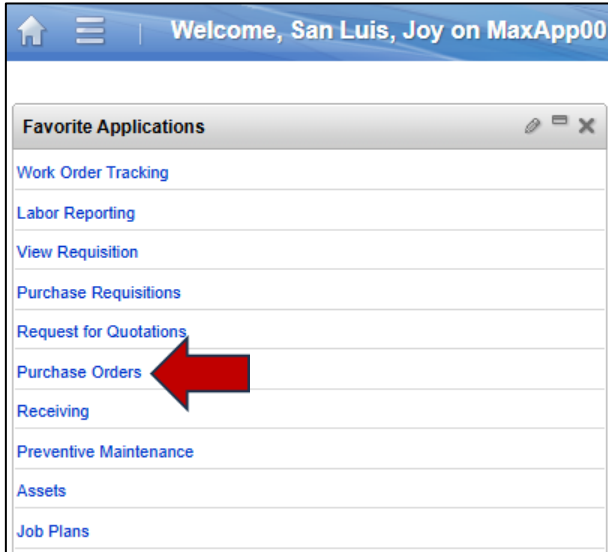


**CLOSE** – The PR completed its interface, and the Purchase Order number was successful.

The **Requested By** employee and **Clerical** staff who changed the status of the PR to **Ready to Interface (INTREADY)** will receive an email, regarding the status of the interface submission. If the **Purchase Order number** was created successfully, the **PO number** will be included in the email.

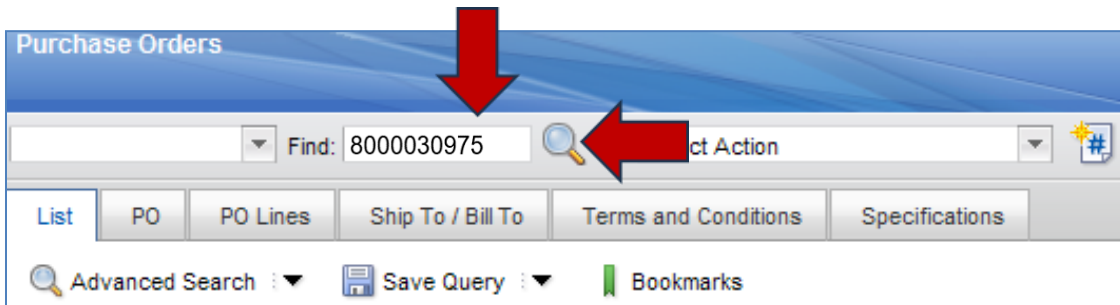
## 6. PRINT PURCHASE ORDER REPORT

Under the Favorite Applications section, click on the **Purchase Orders** application.

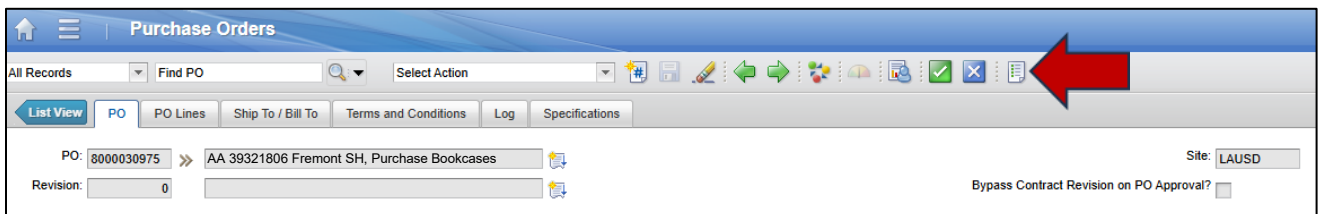


### PURCHASE ORDERS HOME

You will be taken to the **Purchase Orders** application. Search for your Purchase Order by entering the Ariba-generated PO number in the find field and click on the  icon to search.



On the **Purchase Order** record, Click on the  icon located in the top tool bar to run the **Purchase Order Details** report.



A new **BIRT Report Viewer** window will appear. Review the **Purchase Order Details** report for accuracy. To print the report, click on the printer  icon.

| Reporting                                                                                                                                                                                                                                                                          |             |                                                                                                                                                                              |                                                                                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Page                                                                                                                                                                                                                                                                               | 1           | of 1                                                                                                                                                                         |  |
|  <b>Los Angeles Unified School District</b>                                                                                                                                                       |             | <b>Existing Facilities Maintenance &amp; Operations</b>                                   |                                                                                   |
| <b>Purchase Order</b>                                                                                                                                                                                                                                                              |             |                                                                                                                                                                              |                                                                                   |
| <b>PO NO.:</b> 8000030975                                                                                                                                                                                                                                                          |             | <b>Purchase Req No. :</b> 744698                                                                                                                                             |                                                                                   |
| <b>PO Revision No.:</b> 0                                                                                                                                                                                                                                                          |             | <b>PO Type (from PR or RFQ):</b> PD                                                                                                                                          |                                                                                   |
| <b>ARIBA PO NUMBER(S):</b> 8000036544                                                                                                                                                                                                                                              |             |                                                                                                                                                                              |                                                                                   |
| <b>PO Date:</b> 9/30/25                                                                                                                                                                                                                                                            |             | <b>Vendor:</b> 1000003130                                                                                                                                                    |                                                                                   |
| <b>Requested Delivery Date:</b> 10/12/25                                                                                                                                                                                                                                           |             | <b>Payment Terms:</b>                                                                                                                                                        |                                                                                   |
|                                                                                                                                                                                                                                                                                    |             | <b>Freight Terms:</b>                                                                                                                                                        |                                                                                   |
| <b>Requestor:</b> San Luis, Joy                                                                                                                                                                                                                                                    |             | <b>Responsible Person:</b> Cortez, Elmer                                                                                                                                     |                                                                                   |
| <b>PR/RFQ Modified By:</b> Rodriguez, Theresa                                                                                                                                                                                                                                      |             | <b>PO Area/Region:</b> CENTRAL                                                                                                                                               |                                                                                   |
| <b>Contract:</b>                                                                                                                                                                                                                                                                   |             | <b>Exp Date:</b>                                                                                                                                                             |                                                                                   |
| <b>Contract Capacity:</b> \$0.00                                                                                                                                                                                                                                                   |             |                                                                                                                                                                              |                                                                                   |
| <b>AA 39321806 Fremont SH, Purchase Bookcases</b>                                                                                                                                                                                                                                  |             |                                                                                                                                                                              |                                                                                   |
| <b>Vendor:</b><br><b>SAP Vendor:</b> 1000003130<br><b>Maximo Vendor:</b> 107233<br><b>Name:</b> GALE SUPPLY CO<br><b>Address:</b> 23303 La Palma Avenue<br>Yorba Linda, CA, 92887<br><b>Phone:</b> 800-859-0128<br><b>FAX:</b> 310-207-1991<br><b>Attention:</b> BARBARA J. WALKER |             | <b>Ship To:</b><br><b>Name:</b> M&O MAINTENANCE NORTH<br>1<br><b>Address:</b> 6651-B BALBOA BLVD<br>VAN NUYS, CA, 91406<br><b>Phone:</b><br><b>FAX:</b><br><b>Attention:</b> |                                                                                   |
|                                                                                                                                                                                                                                                                                    |             | <b>Bill To / Invoice To:</b><br><b>INVOICES@LAUSD.NET</b><br><b>cc: c.sanluis@lausd.net</b>                                                                                  |                                                                                   |
| #                                                                                                                                                                                                                                                                                  | School Name | GL Account / Work Order #                                                                                                                                                    | #                                                                                 |
| 001                                                                                                                                                                                                                                                                                | FREMONT SH  | IO:307001865001 RRMA<br>38393835                                                                                                                                             |                                                                                   |

**Clerical** staff signs the **PO Details Report**. Attach the signed **PR Report** with the **PO Report** and submit to **Requestor** for confirmation and filing.

The **Requestor** should submit a copy of the **PO Details Report** or provide the **PO Number** to **Vendor** to initiate purchase.

## 7. OPTIONAL: MODIFY PURCHASE ORDER

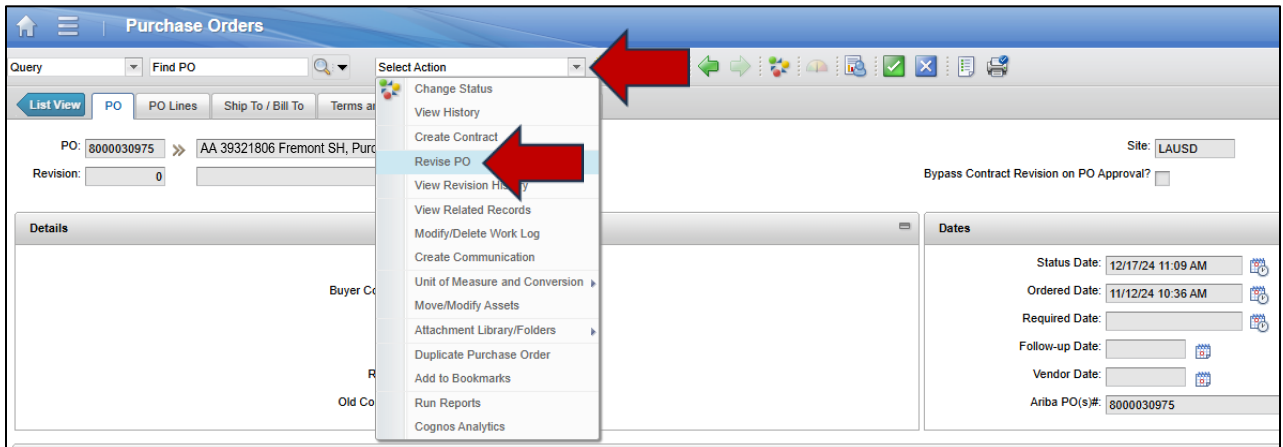
*The requestor performs this function.*

Modifications are **ONLY** available for the **Description, Quantity, and Unit Cost** of a Purchase Order. You cannot change any other information. To modify the associated **Work Order**, you must delete the PO Line you wish to change and add a new one. If you need to modify any other information, you will have to **CANCEL** the **Purchase Order** and submit a new **Purchase Requisition**.

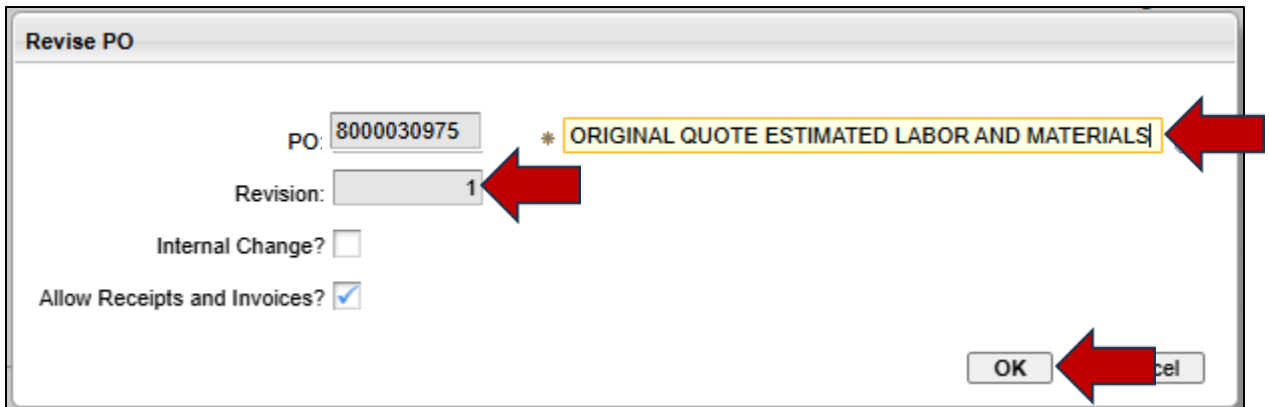
**Note:** Return or void any goods receipts entered, prior to beginning a modification.

To change the **Description, Quantity, Unit Cost**, or the **Work Order**, go to the **PO record** in the **Purchase Order** application.

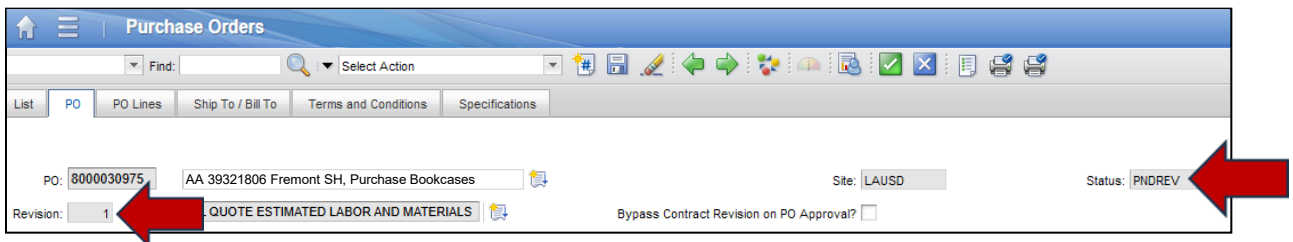
On the **PO record**, click on the **Select Action** dropdown and select **Revise PO**.



A **Revise PO** window will appear. To the right of the PO number, type in your justification for the modification. You will also notice that the Revision number is now 1. Click **OK** when done.

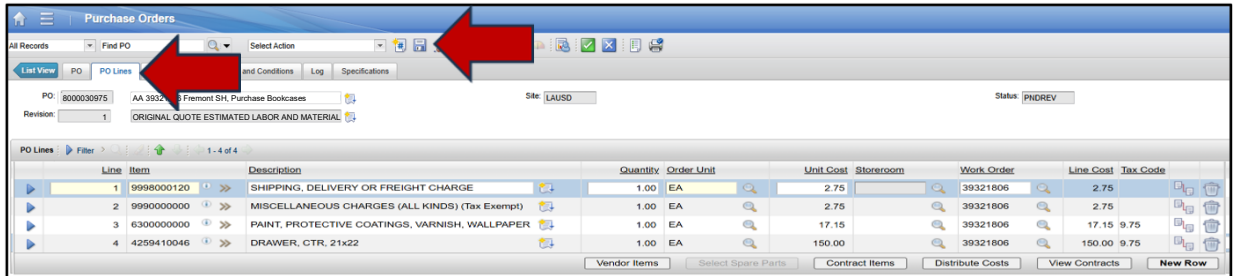


After you click **OK**, you cannot edit the revision justification, and you will be taken to your revised **PO record**. Notice the Revision number is now 1 and the status is **PNDREV (Pending Revision)**.



## Maximo 7.6 / Low Value Purchase (PD) Guide

Click on the **PO Lines** tab to make your modifications. To modify the **Work Order Number**, you must add a new row. Click on the floppy disk  icon to save.



**Purchase Orders**

All Records Find PO Select Action

List View PO PO Lines and Conditions Log Specifications

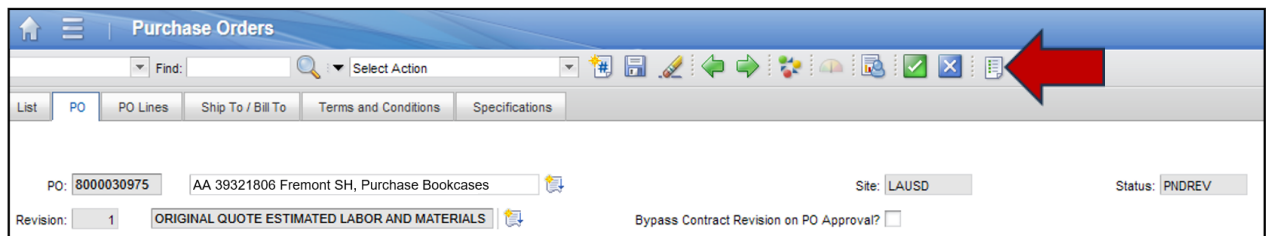
PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: PNDREV

Revision: 1 ORIGINAL QUOTE ESTIMATED LABOR AND MATERIAL

| Line | Item       | Description                                    | Quantity | Order Unit | Unit Cost | Storeroom | Work Order | Line Cost | Tax Code |
|------|------------|------------------------------------------------|----------|------------|-----------|-----------|------------|-----------|----------|
| 1    | 9998000120 | SHIPPING, DELIVERY OR FREIGHT CHARGE           | 1.00     | EA         | 2.75      |           | 39321806   | 2.75      |          |
| 2    | 9990000000 | MISCELLANEOUS CHARGES (ALL KINDS) (Tax Exempt) | 1.00     | EA         | 2.75      |           | 39321806   | 2.75      |          |
| 3    | 6300000000 | PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAPER | 1.00     | EA         | 17.15     |           | 39321806   | 17.15     | 9.75     |
| 4    | 4259410046 | DRAWER, CTR, 21x22                             | 1.00     | EA         | 150.00    |           | 39321806   | 150.00    | 9.75     |

Vendor Items Select Spare Parts Contract Items Distribute Costs View Contracts New Row

Print your **Modified Purchase Order** report by clicking on the  icon on the toolbar.



**Purchase Orders**

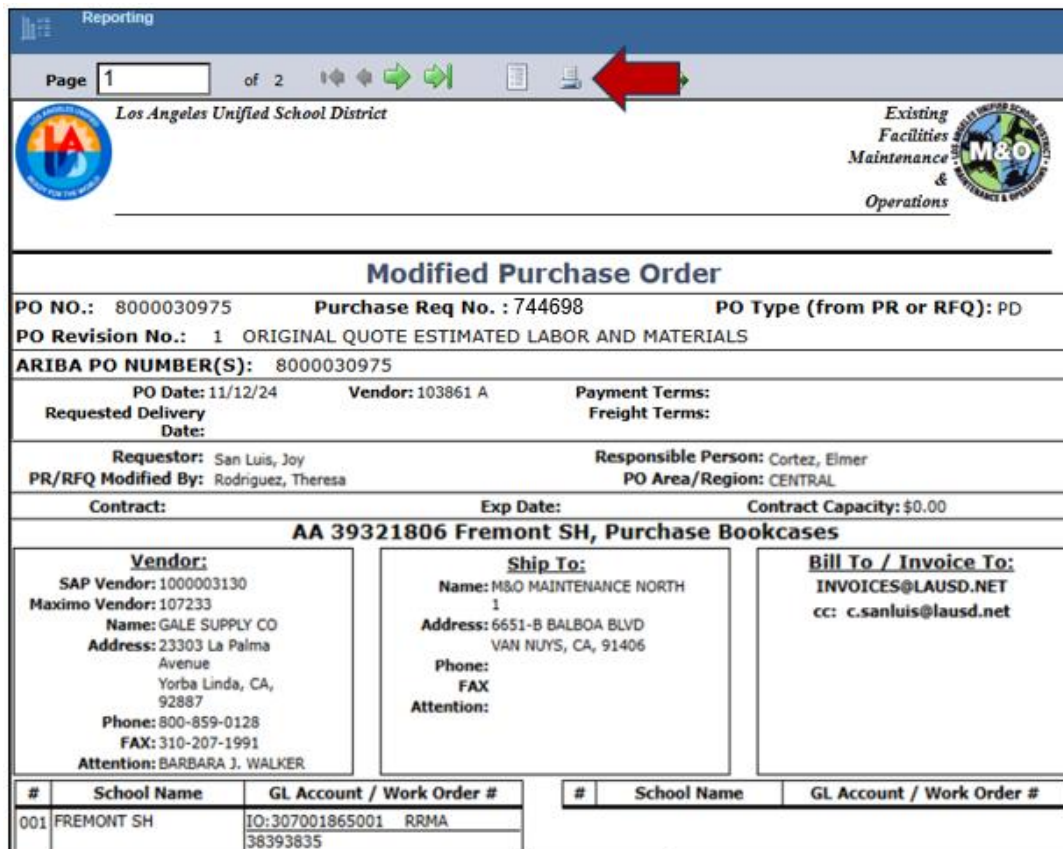
Find: Select Action

List PO PO Lines Ship To / Bill To Terms and Conditions Specifications

PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: PNDREV

Revision: 1 ORIGINAL QUOTE ESTIMATED LABOR AND MATERIALS Bypass Contract Revision on PO Approval? ☐

A new **BIRT Report Viewer** window will appear. Review the **Modified Purchase Order Report** for accuracy. To print the report, click on the printer  icon.



**Reporting**

Page 1 of 2

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

### Modified Purchase Order

PO NO.: 8000030975 Purchase Req No.: 744698 PO Type (from PR or RFQ): PD

PO Revision No.: 1 ORIGINAL QUOTE ESTIMATED LABOR AND MATERIALS

ARIBA PO NUMBER(S): 8000030975

PO Date: 11/12/24 Vendor: 103861 A Payment Terms: Requested Delivery Date: Freight Terms:

Requestor: San Luis, Joy Responsible Person: Cortez, Elmer  
PR/RFQ Modified By: Rodriguez, Theresa PO Area/Region: CENTRAL

Contract: Exp Date: Contract Capacity: \$0.00

**AA 39321806 Fremont SH, Purchase Bookcases**

| Vendor:                                                                                                                                                                                                         | Ship To:                                                                                                               | Bill To / Invoice To:                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|
| SAP Vendor: 1000003130<br>Maximo Vendor: 107233<br>Name: GALE SUPPLY CO<br>Address: 23303 La Palma Avenue<br>Yorba Linda, CA, 92887<br>Phone: 800-859-0128<br>FAX: 310-207-1991<br>Attention: BARBARA J. WALKER | Name: M&O MAINTENANCE NORTH<br>1<br>Address: 6651-B BALBOA BLVD<br>VAN NUYS, CA, 91406<br>Phone:<br>FAX:<br>Attention: | INVOICES@LAUSD.NET<br>cc: c.sanluis@lausd.net |

| #   | School Name | GL Account / Work Order #        |
|-----|-------------|----------------------------------|
| 001 | FREMONT SH  | IO:307001865001 RRMA<br>38393835 |

The Requestor is responsible for signing the **Modified PO** report. The Requestor is to obtain the required signature on the **Approved to Modify** line. The **Approved to Modify** signature is determined by the Dollar amount of the requisition.

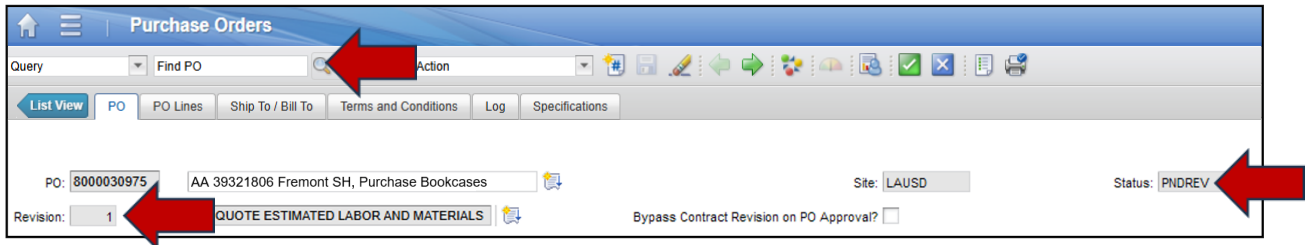
|                        |                       |
|------------------------|-----------------------|
| <b>AFSD</b>            | \$0 - \$150,000       |
| <b>RDF</b>             | \$150,001 - \$250,000 |
| <b>Deputy Director</b> | \$250,001 - \$500,000 |
| <b>Director</b>        | \$500,001+            |

|                                                             |         |
|-------------------------------------------------------------|---------|
| Requested By: San Luis, Joy                                 | 10/2/25 |
| Approved to Modify (Print Name / Signature / Title)         | Date    |
| PO Successfully Updated By (Print Name / Signature / Title) | Date    |
| Inspected By (Print Name / Signature / Title)               | Date    |
| Received By (Print Name / Signature / Title)                | Date    |
| Approved To Pay (Print Name / Signature / Title)            | Date    |

This Purchase Order is VOID if signature does not appear. By accepting this Purchase Order, Vendor agrees to all Terms and Conditions at <https://www.lausd.org/Page/19828>. For Purchase Orders issued against LAUSD contracts, please refer to Terms and Conditions contained within associated contracts.

Submit the signed **Modified PO** report and supporting documents to **Clerical** for processing. *The Clerical department performs this function.*

Go to the **Revised PO** record in the **Purchase Order** application. You may search for it by entering the **PO number** in the search field and click on the  icon. Make sure you are on the **Revised PO**; the status will also be in **PNDREV**.



Purchase Orders

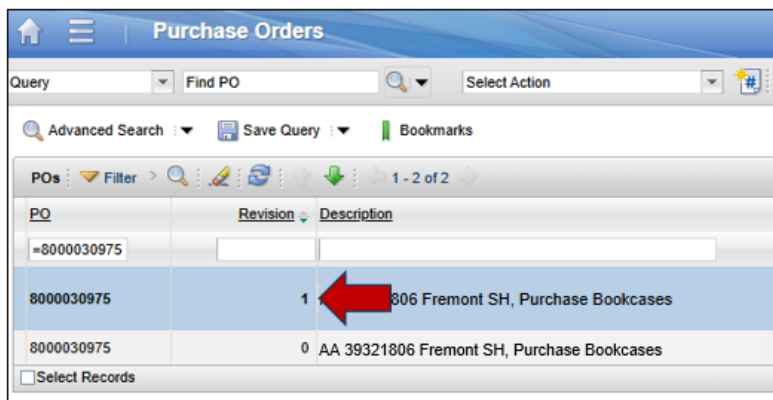
Query Find PO Action

List View PO PO Lines Ship To / Bill To Terms and Conditions Log Specifications

PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: PNDREV

Revision: 1 QUOTE ESTIMATED LABOR AND MATERIALS Bypass Contract Revision on PO Approval?

If you are not on your revised PO record, click on the **List** tab. The result set will display both PO revisions. Select the revision that was submitted to you on the Modified PO report.



Purchase Orders

Query Find PO Select Action

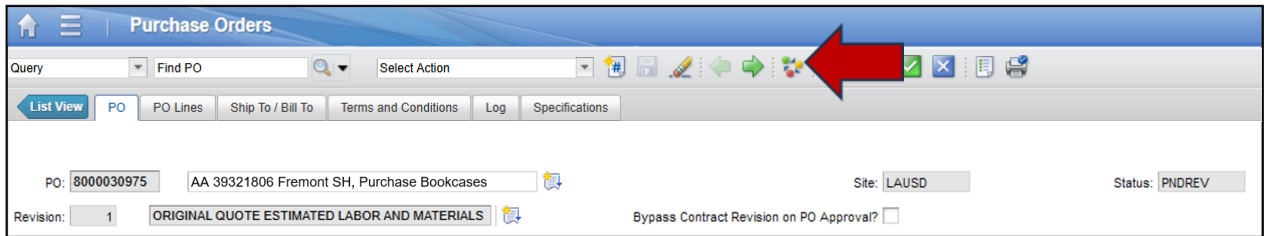
Advanced Search Save Query Bookmarks

POs Filter 1 - 2 of 2

| PO         | Revision | Description                                |
|------------|----------|--------------------------------------------|
| 8000030975 | 1        | AA 39321806 Fremont SH, Purchase Bookcases |
| 8000030975 | 0        | AA 39321806 Fremont SH, Purchase Bookcases |

Select Records

Attach the **Modified Purchase Order Report** and submitted documentation to the **Revised PO**. See the Document Upload Guide for steps on how to name and upload files. Click on the **Revised PO's**, change status  icon and select **INTREADY (Ready to Interface)**.



Purchase Orders

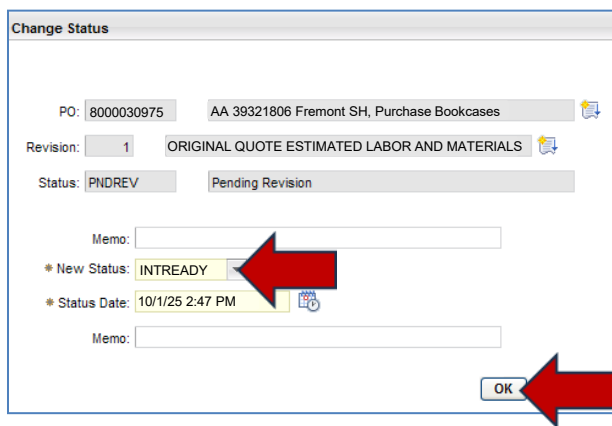
Query: Find PO Select Action

List View PO PO Lines Ship To / Bill To Terms and Conditions Log Specifications

PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: PNDREV

Revision: 1 ORIGINAL QUOTE ESTIMATED LABOR AND MATERIALS Bypass Contract Revision on PO Approval? ☐

Select **Ready to Interface** on the **New Status** dropdown and hit **OK**.



Change Status

PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases

Revision: 1 ORIGINAL QUOTE ESTIMATED LABOR AND MATERIALS

Status: PNDREV Pending Revision

Memo:

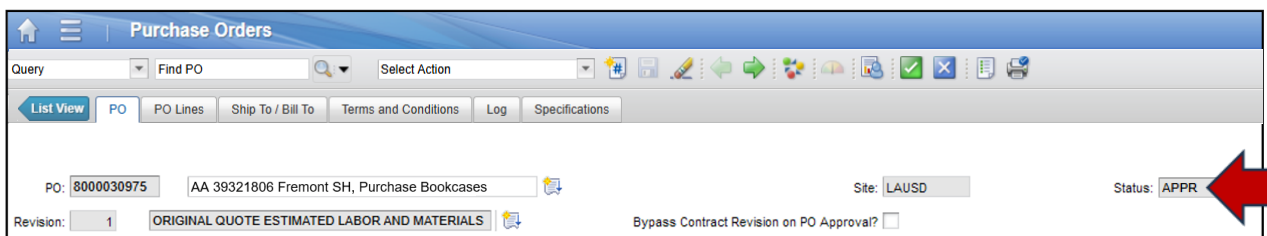
New Status: INTREADY

Status Date: 10/1/25 2:47 PM

Memo:

OK

The **Modified PO** will interface through the same cycle as before with email notifications. If successful, the **Modified PO** record status will automatically be changed to **APPR**.



Purchase Orders

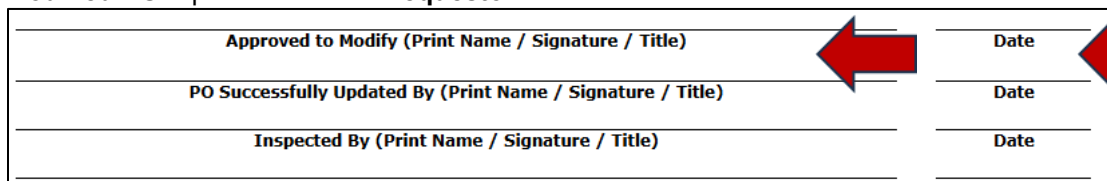
Query: Find PO Select Action

List View PO PO Lines Ship To / Bill To Terms and Conditions Log Specifications

PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD Status: APPR

Revision: 1 ORIGINAL QUOTE ESTIMATED LABOR AND MATERIALS Bypass Contract Revision on PO Approval? ☐

After the status is changed to **APPR**, sign the PO Successfully Update By line, and submit the **Modified PO** report back to the **Requestor**.



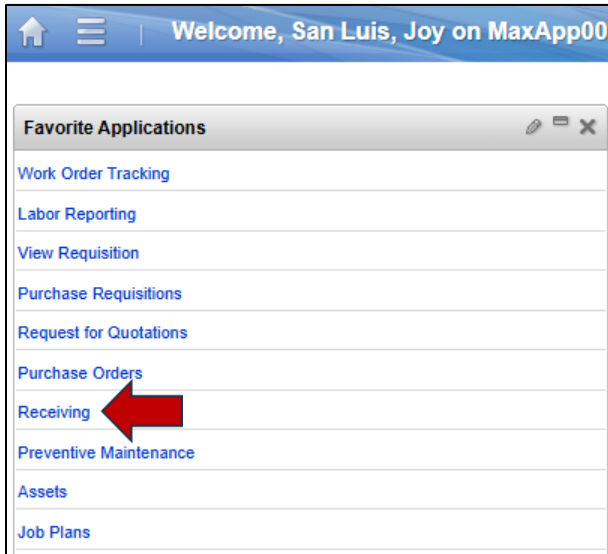
|                                                             |      |
|-------------------------------------------------------------|------|
| Approved to Modify (Print Name / Signature / Title)         | Date |
| PO Successfully Updated By (Print Name / Signature / Title) | Date |
| Inspected By (Print Name / Signature / Title)               | Date |

**Requestor** to submit a copy of the **Modified PO** report to **Vendor**.

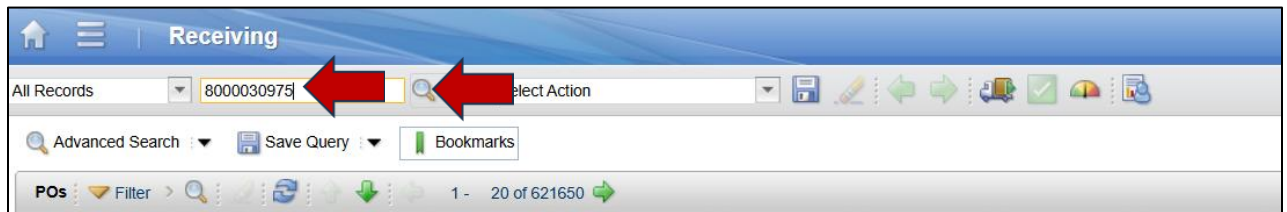
## 8. RECEIVING ORDER

*The Receiver performs this function*

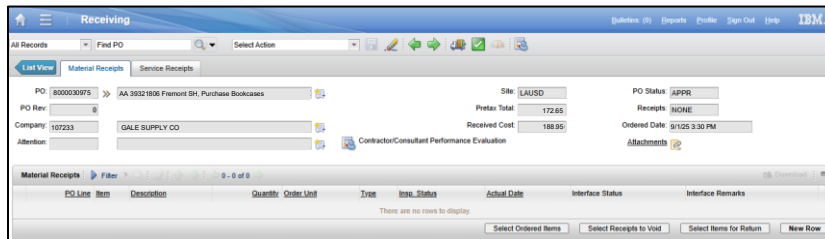
After receiving the item(s) from the vendor, the **Receiver** will create the **Goods Receipts** in Maximo. In the **Start Center** of Maximo, under **Favorite Applications**, click on the **Receiving** application.



In the **Receiving** application, enter the **PO number** in the **Find** field and click on the  to search for the record.



You will then be taken to the **Materials Receipt** tab of the record.



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Click on the **Select Ordered Items** button.

The screenshot shows the 'Receiving' interface with the 'Material Receipts' tab selected. The top section contains fields for PO number (8000030975), Site (LAUSD), PO Status (APPR), and other details. Below this is a table with columns: PO Line, Item, Description, Quantity, Order Unit, Type, Insp. Status, Actual Date, Interface Status, and Interface Remarks. The table is currently empty, with a message 'There are no rows to display'. At the bottom right, there are three buttons: 'Select Ordered Items', 'Select Receipts to Void', and 'Select Items for Return'. A red arrow points to the 'Select Ordered Items' button.

The **Select Ordered Items** window will appear. Select the checkbox(es) on the lines that were received, verify the Quantity, and click the **OK** button.

The screenshot shows the 'Select Ordered Items' dialog box. It has a 'Storeroom' field at the top. Below is a table with columns: PO Line, Item, Description, Packing Slip, To Storeroom, Quantity Due, Quantity Ordered, Invoice, and Remarks. There are four lines of data, each with a checkbox in the 'PO Line' column. The first line is selected. A red arrow points to the first line. At the bottom right, there are 'OK' and 'Cancel' buttons. Another red arrow points to the 'OK' button.

You will be taken back to the previous screen. Click on the floppy disk icon to save the record. The **Receipt Inspection Status** will be changed to **WINSP** and is ready for approval. The **Receipts** status will remain as **NONE** until approved by clerical.

The screenshot shows the 'Receiving' interface after saving the record. The 'Material Receipts' tab is still active. The table now contains two rows of data. The first row has 'PO Line' 1, 'Item' 4259410046, 'Description' 'DRAWER, CTR 21x22', 'Quantity' 1.00, 'Order Unit' EA, 'Type' RECEIPT, 'Insp. Status' WINSP, and 'Actual Date' 10/2/25 1:30 PM. The second row has 'PO Line' 2, 'Item' 6300000000, 'Description' 'PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAP', 'Quantity' 1.00, 'Order Unit' EA, 'Type' RECEIPT, 'Insp. Status' WINSP, and 'Actual Date' 10/2/25 1:30 PM. The 'Receipts' status remains 'NONE'. At the bottom right, there are three buttons: 'Select Ordered Items', 'Select Receipts to Void', and 'Select Items for Return'. A red arrow points to the 'Select Ordered Items' button.

Requestor to obtain **Inspected By**, **Received By** and **Approved to Pay** signatures on the **PO Report**.

|                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inspected By    | <p>The act of examining goods that have been delivered to determine conformance to what was ordered via the purchase order.</p> <ul style="list-style-type: none"> <li>• Verify that what was ordered conforms to purchase document (purchase order, statement of work, specifications, attachments, etc...)</li> <li>• Verify the quantity ordered against the quantity shipped or delivered.</li> <li>• Inspect for damage or breakage.</li> <li>• Verify that the unit of measurement count is correct. <ul style="list-style-type: none"> <li>○ Example 1: If the unit of measurement on the purchase order is 200 square feet of playground matting, measure actual installed matting square footage.</li> <li>○ Example 2: If the unit of measurement on the purchase order is one dozen, count 12 in the unit package.</li> </ul> </li> <li>• Verify that delivery documentation (packing slip, certifications, etc.) is acceptable.</li> <li>• Verify that packaging integrity is preserved (no leakage, damages, etc.).</li> <li>• If needed, take photo of goods/services for confirmation of inspection.</li> </ul> |
| Received By     | The act of taking possession of goods in order to stage them for inspection or place them into inventory.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Approved to Pay | The act of verifying that all purchase documents are in place and accurate (vendor quote, purchase requisition, purchase order, invoice) and may proceed to invoice payment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

|                                                  |                 |
|--------------------------------------------------|-----------------|
| PO Successfully Created By: San Luis, Joy        | 10/2/25<br>Date |
| Inspected By (Print Name / Signature / Title)    | Date            |
| Received By (Print Name / Signature / Title)     | Date            |
| Approved To Pay (Print Name / Signature / Title) | Date            |

**This Purchase Order is VOID if signature does not appear. By accepting this Purchase Order, Vendor agrees to all Terms and Conditions at <https://www.lausd.org/Page/19828>. For Purchase Orders issued against LAUSD contracts, please refer to Terms and Conditions contained within associated contracts.**

**Note:** The person receiving the item(s) cannot be the same person who generated the requisition.

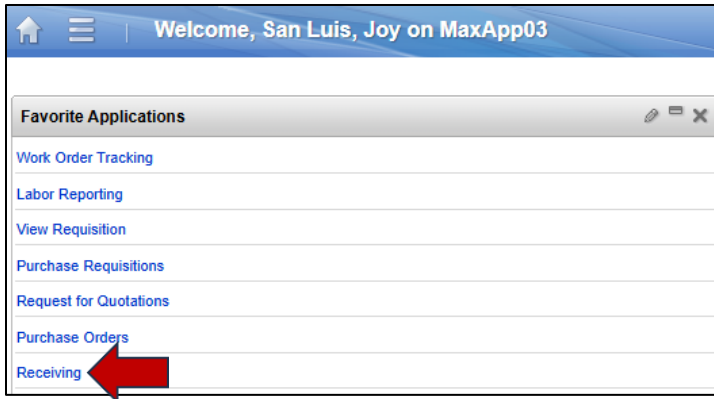
Submit the **PO report**, **Purchase receipt(s)**, **Packing Slip** and **Vendor Invoice** to **Clerical** to conduct the PO closure process.

## 9. APPROVING RECEIVER

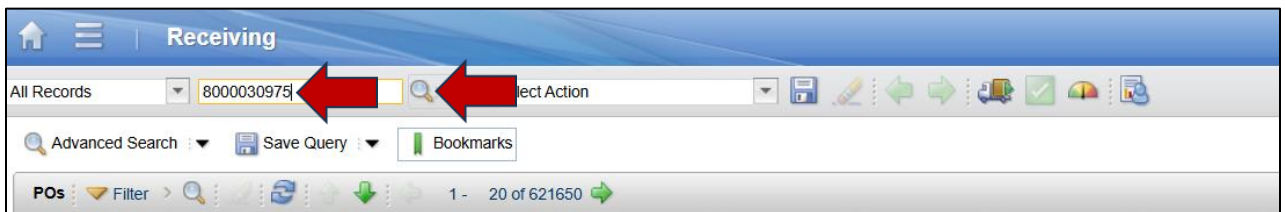
*The Clerical Department performs this function.*

Review and attach the **Approved to Pay PO** packet to the PO. Follow the Document Upload Guide for best practices when uploading.

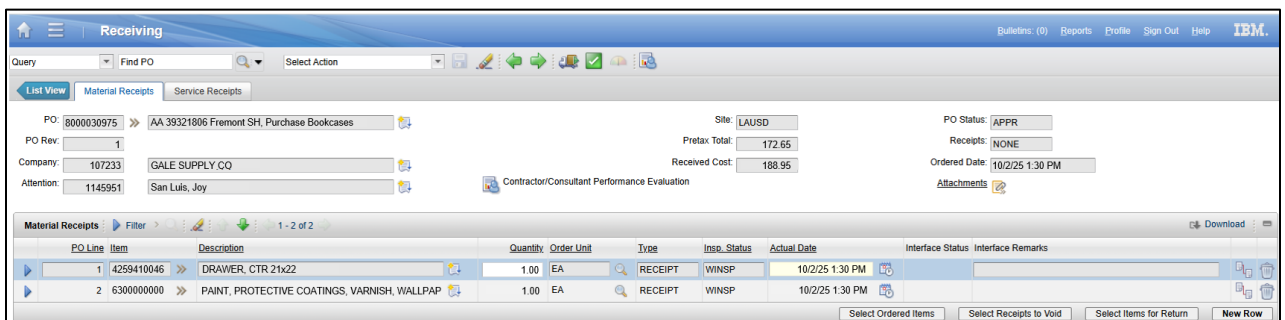
Go to the Receiving application, through either your favorite application list on the start center or by clicking on the **Hamburger Menu**, **Purchasing**, followed by **Receiving**.



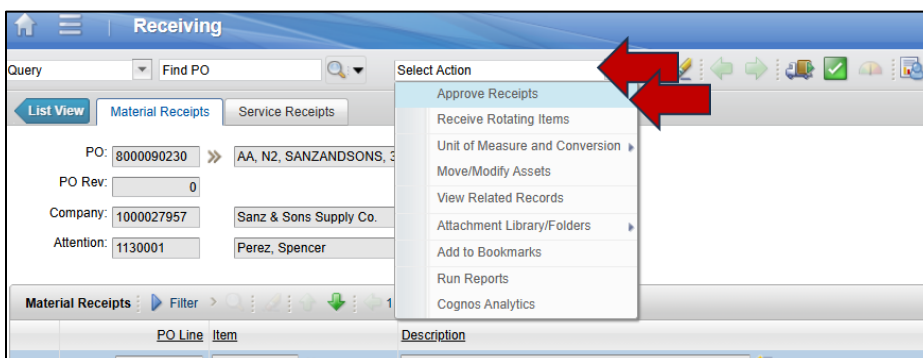
In the **Receiving** application, enter the PO Number in the Find field, then click on the  icon, to search for the record.



This will take you to the **Materials Receipt** tab of the record. Here, you should see the Received lines with a **WINSP Inspection Status**. With our end goal of paying the invoices, we first need to approve the **Goods Receipts**.



Go to **Select Action, Approve Receipts**.



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Select the checkboxes of the items received, then click **OK**.

**Change Inspection Status**

Material Receipts | Service Receipts

Material Receipts: Filter > 1 - 2 of 2 Download

| <input type="checkbox"/>            | PO Line | Item       | Description                                  | Inspected Qty | Approved Quantity |
|-------------------------------------|---------|------------|----------------------------------------------|---------------|-------------------|
| <input checked="" type="checkbox"/> | 1       | 4259410046 | DRAWER, CTR 21x22                            | 1.00          | 1.00              |
| <input checked="" type="checkbox"/> | 2       | 6300000000 | PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAP | 1.00          | 1.00              |

OK

The receipt's status will change to **COMPLETE**, and **Inspection Status** to **COMP**. This will create a line where under **Type**, the field will say **TRANSFER**.

**Receiving**

Query: Find PO Select Action

List View | Material Receipts | Service Receipts

PO: 8000030975 AA 39321806 Fremont SH, Purchase Bookcases Site: LAUSD PO Status: APPR  
PO Rev: 1 Pretax Total: 172.65 Receipts: COMPLETE  
Company: 107233 GALE SUPPLY CO Received Cost: 188.95 Ordered Date: 10/2/25 1:30 PM  
Attention: 1145951 San Luis, Joy Contractor/Consultant Performance Evaluation Attachments

Material Receipts: Filter > 1 - 2 of 2 Download

| PO Line | Item       | Description                                  | Quantity | Order Unit | Type     | Insp. Status | Actual Date     | Interface Status | Interface Remarks |
|---------|------------|----------------------------------------------|----------|------------|----------|--------------|-----------------|------------------|-------------------|
| 1       | 4259410046 | DRAWER, CTR 21x22                            | 1.00     | EA         | RECEIPT  | COMP         | 10/2/25 1:30 PM |                  |                   |
| 2       | 6300000000 | PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAP | 1.00     | EA         | RECEIPT  | COMP         | 10/2/25 1:30 PM |                  |                   |
| 1       | 4259410046 | DRAWER, CTR 21x22                            | 1.00     | EA         | TRANSFER | COMP         | 10/2/25 1:30 PM |                  |                   |

Should you have any questions on this guide, please contact the Maximo Team at [maximoteam@laschools.org](mailto:maximoteam@laschools.org).