

Los Angeles Unified School District

Maximo 7.5 / Procurement

Storeroom Inventory – How to Track and Process Salvaged Items



DEFINITION

The **Storeroom Inventory – How to Track and Process Salvaged Items** guide details step by step instructions on how to track and process salvaged items in Maximo.

LOGIN

The Head Stock Clerk 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 3D nut icon 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."

1. RESERVE SALVAGE ITEMS ON “STOREROOM TO SALVAGE WAREHOUSE TRACKING” WORK ORDER

START CENTER

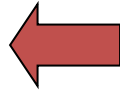
When you first login, you will be taken to the Maximo Start Center.



The Start Center interface includes a top navigation bar with links like "Home", "Go To", "Reports", "Start Center", "Profile", "Sign Out", and "Help". Below this is a "Favorite Applications" list on the left with items like "Work Order Tracking", "Purchase Requisitions", "Request for Quotations", "Purchase Orders", "Receiving", "Preventive Maintenance", "Assets", "Labor Reporting", "Job Plans", "Assignment Sheet", "Invoices", and "Work Requests". The main area is titled "Bulletin Board" and contains a table with columns: "Subject", "Message", "Post Date", "Expiration Date", and "Viewed". The table is currently empty, with a message stating "There are currently no bulletin board messages to view."



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

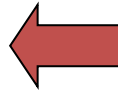


Go to your respective “Storeroom to Salvage Warehouse Tracking” work order number:

Department	Work Order Number	Description
N1	27842112	AREA-N1 – Storeroom to Salvage Warehouse Tracking
N2	27842119	AREA-N2 – Storeroom to Salvage Warehouse Tracking
S1	27842127	AREA-S1 – Storeroom to Salvage Warehouse Tracking
S2	27842135	AREA-S2 – Storeroom to Salvage Warehouse Tracking
C1	27842092	AREA-C1 – Storeroom to Salvage Warehouse Tracking
C2	27842101	AREA-C2 – Storeroom to Salvage Warehouse Tracking
C3	27842107	AREA-C3 – Storeroom to Salvage Warehouse Tracking
FETU	27842139	FETU – Storeroom to Salvage Warehouse Tracking

WORK ORDER TRACKING HOME

You will then be taken to the Work Order Tracking home screen; in this screen, you will search for your salvage work order (See above table).



Sample work order

Work Order Tracking
danny.lu on MXServer0

Find: [] Select Action []

Class: WORKORDEF

Work Order: 27842112 * AREA-N1 - STOREROOM TO SALVAGE WAREHOUSE TR

* Cost Center: 0001049401 SCHOOL SERVICES - M&O N1

* Location: S-15183 M & O AREA N1

Location Path: M & O AREA N1 :

Asset: >>

Job Type: 71 Overhead

CPM:

Section:

GL Account: GL:932050

Parent WO: >>

* Work Type: CM

* WO Priority: 3

Service Call? ☐

Priority Justification:

Phone:

Cafeteria Phone:

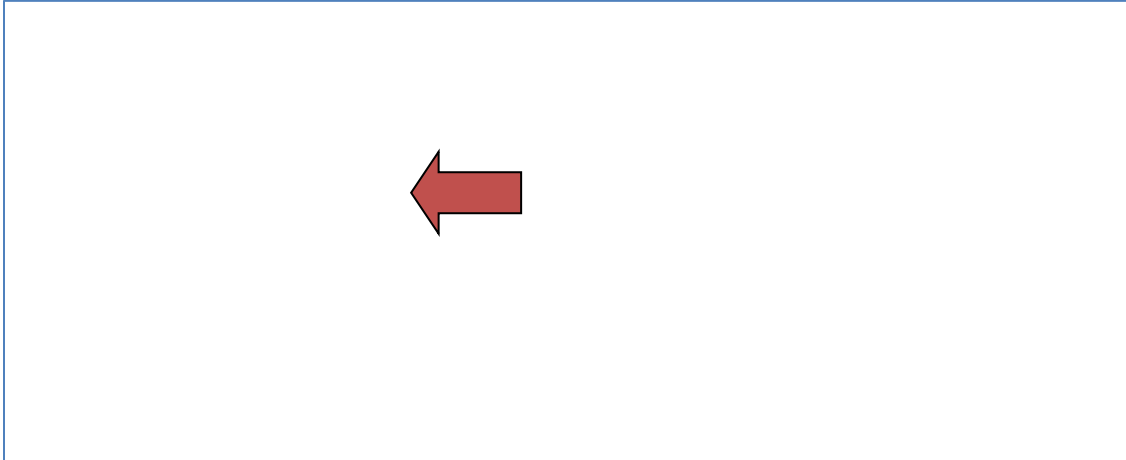
Complex Name: PUN-N1

LCFF? ☐

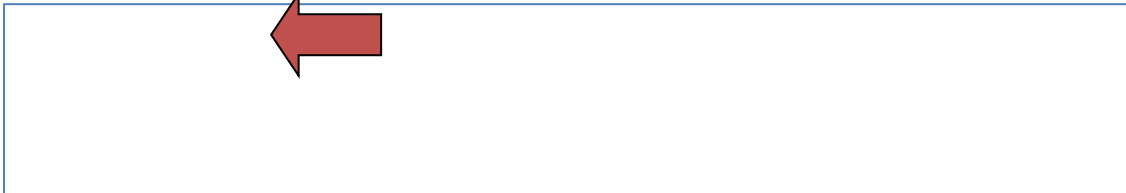


Maximo 7.5 / Storeroom Inventory – How to Track and Process Salvaged Items

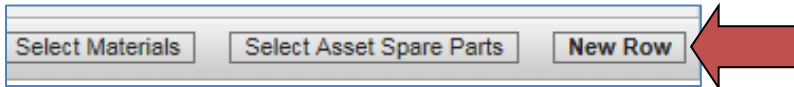
Click on the **Plans** tab to reserve items from your Storeroom that you will/have salvaged.



Click on the **Materials** tab.

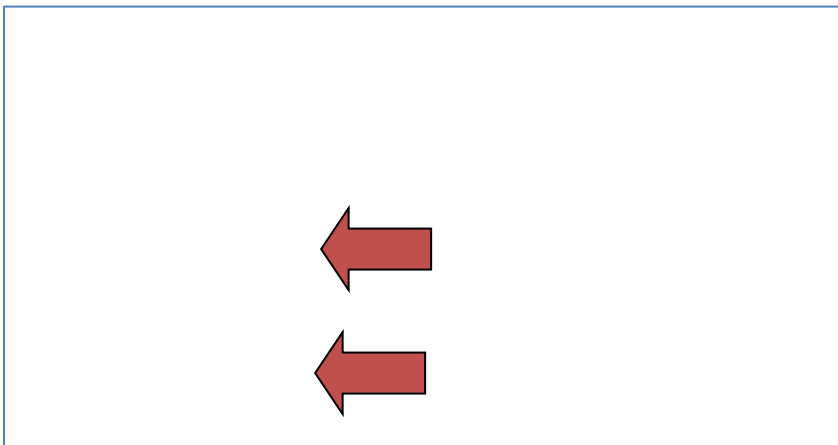


Click on the **New Row** button.



In the details view of the new row, enter the following fields:

- Material Category → MA
- Line Type → Item
- Item Number → The Storeroom item number of the material you are salvaging/salvaged.
- Quantity → The quantity you are moving/moved to salvage.
- Storeroom → The Storeroom where the item is located
- Craft → HX



Click on the **floppy disk** icon to save. Repeat step for next item.



2. GENERATE TRANSPORTATION ORDER FORM

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

The screenshot shows the Maximo Work Order interface for work order 27842112. The 'Select Action' dropdown menu is open, displaying various actions. The 'Run Reports' option is highlighted at the bottom of the menu. A red arrow points to the 'Select Action' dropdown, and another red arrow points to the 'Run Reports' option.

Task	Mat Cat	Line
MA	MA	ITE
MA	MA	ITE

Description
2500234 >> THERMOSTAT, HONEYWELL PRO 5000
1547159 >> BELT, BANDFILE, 1 1/8" X 21", 40 GRIT

Search for the **Transportation Order Form** report. Click on the report name.

The screenshot shows the Maximo Reports interface. The 'On Demand Reports' tab is selected. The 'Reports to Run' section shows a search filter applied. The 'Transportation Order Form' report is highlighted in the list. A red arrow points to the 'Transportation Order Form' report name.

Description
transportation
Transportation Order Form

Create Report Cancel



The **Request Page** will appear, select your **storeroom** and click **Submit**.

Request Page

Help Text

Parameters

* Select applicable storeroom: **=STORES-1**

Output format (pdf is default, or leave blank for web browser view): pdf

The PDF report will appear. All (unissued) planned reserved items against your standing salvage work order/Storeroom will be pre-populate on the order form along with the pick-up information. Please review for accuracy and print.

Fill out any remaining information and have your AFSD or Designee sign off on the **Approved By** field and proceed with existing process on salvaging the items.

TRANSPORTATION ORDER
LOS ANGELES UNIFIED SCHOOL DISTRICT PHOTOCOPY AS NEEDED

Downloadable PDF version of this form is available at: <http://achieve.lausd.net/Page/8694>

DATE:	Jan 4, 2018		
PICK-UP AT	School or Office (Official Name) SCHOOL SERVICES - M&O N1	Cost Center (Location Code) 0001049401	
	Address 6651-B BALBOA BLVD LAKE BALBOA, CA 91406	Building & Room Number	
DELIVER TO	School or Office (Official Name)	Cost Center	☐ GENERAL STORES
	Address	Building & Room Number	☐ SURPLUS PROPERTY (SALVAGE) ☐ TRANSFERS
APPROVED BY (Name, Title & Signature)		Contact Person & Telephone Number	

RECEIVING CHECK	QUANTITY	UNIT	STOCK/SERIAL NUMBER	ITEM DESCRIPTION	UNIT PRICE	TOTAL PRICE	PROGRAM CODE
	10.00	EA	0051547159	BELT, BANDFILE, 1 1/8" X 21", 40 GRIT	\$3.84	\$38.40	
	5.00	EA	0312500234	THERMOSTAT, HONEYWELL PRO 5000	\$74.13	\$370.65	

RELEASED BY: _____ signature _____ Date _____
_____ print name _____ position / title _____

ABOVE ITEMS PICKED UP BY:	DATE:	RECEIVING CLERK'S SIGNATURE:	DATE:
FOR GENERAL STORES SECTION ONLY:			
☐ Inspected and approved for return stock		☐ APPROVED FOR CREDIT	
☐ Verified as defective		☐ NO credit to be allowed	
Signed _____ Date _____		Signed _____ Date _____	
FOR JOB COST - INVENTORY CONTROL USE ONLY:			
Reviewed by _____		Date _____	
Approved for input by _____		Date _____	

For surplus pick-ups, please either e-mail this completed form to truckop@lausd.net or fax to (562) 654-9011. rev. JULY 2016
For product returns to the General Stores Distribution, please use the Order Adjustment Form.



3. ISSUE ITEMS AGAINST WORK ORDER TO UPDATE INVENTORY BALANCE

When items have been delivered to/picked-up by the Transportation department. You need to issue the items against the standing work order to update your inventory.

On the Work Order record in the Work Order Tracking application, click on the **Actuals** tab.

Work Order Tracking
danny.lu on MXServer0

Find: [] Select Action []

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

Work Order: 27842112 * AREA-N1 - STOREROOM TO SALVAGE WAREHOUSE TR Status: APPR Cost Cent

Click on the **Materials** tab.

Work Order Tracking
danny.lu on MXServer0

Find: [] Select Action []

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

Work Order: 27842112 * AREA-N1 - STOREROOM TO SALVAGE WAREHOUSE TR Status: APPR Cost Cent

Children of Work Order 27842112 Filter > 0 - 0 of 0

Filter > 0 - 0 of 0

Sequence Task Summary

...No rows to display...

Labor **Materials** Tools

Materials Filter > 0 - 0 of 0

Task Item Description Transaction Type

...No rows to display...

Under the **Materials** tab, click on the **Select Reserved Items** button.

Labor Materials Services Tools

Materials Filter > 0 - 0 of 0

Task Item Description Transaction Type Storeroom Quantity Bin

...No rows to display...

Select Materials Select Reserved Items

A list of items that are reserved against the work order will appear. Check the items that were picked up/delivered to Transportation for salvage and click on the **OK** button.

Select Reserved Items

Items Filter > 1 - 2 of 2 Download

☒	Task	Request	Item	Storeroom	Description	Reserved Quantity	Reservation Type
☒		54236288	0312500234	STORES-1	THERMOSTAT, HONEYWELL PRO 5000	5.00	APHARD
☒		54236289	0051547159	STORES-1	BELT, BANDFILE, 1 1/8" X 21", 40 GRIT	10.00	APHARD

OK



Maximo 7.5 / Storeroom Inventory – How to Track and Process Salvaged Items

The items will now appear under your Materials tab. **Note:** You may adjust the quantity if it is different from what is listed. Any remaining quantities will remain reserved against the work order.

Click on the **floppy disk** icon to save the record.

The screenshot shows the Maximo 7.5 Work Order Tracking interface. The top toolbar contains various icons, including a floppy disk icon for saving. The main area displays work order details for 'AREA-N1 - STOREROOM TO SALVAGE WAREHOUSE TR'. Below this, there is a table for 'Children of Work Order 27842112' which is currently empty. The 'Materials' tab is selected, showing a table with two rows of material data:

Task	Item	Description	Transaction Type	Storeroom	Quantity	Est	Issued To
0051547159		BELT, BANOFIE, 1 1/8" X 21", 40 GRIT	ISSUE	STORES-1	10.00	TR-37C97	
0012500234		THERMOSTAT, HONEYWELL PRO 5000	ISSUE	STORES-1	5.00	02F03	

At the bottom right of the Materials tab, there are buttons for 'Select Materials', 'Select Reserved Items', 'Select Asset Spare Parts', and 'New Row'. A red arrow points to the 'Save' button (floppy disk icon) in the bottom right corner of the Materials tab.

Congratulations! You have successfully recorded an inventory transfer to salvage transaction in Maximo.

Should you have any questions on this guide, please contact Danny Lu (danny.lu@lausd.net / 213-241-1121), Mark Merrick (mark.merrick@lausd.net / 213-241-8620), John Herweg (john.herweg@lausd.net / 213-241-1127) or Rick Peterson (richard.peterson@lausd.net / 213-241-6274).