



Los Angeles Unified School District
**Maximo 7.5 / Procurement
Buyer Card Guide**

Revision Log	
Date	Change Description
7/9/18	Increased Non-Annual Contract process from \$2,500 to \$25,000.
	Replaced Maintenance Material Bid Form with Request for Quotation Form on Non-Annual over \$25,000 purchases.
	Maximo Invoice Record now required.



DEFINITION

The **Buyer Card Guide** is an alternative expedited method to purchase materials and/or services not available from local M&O Area Stores or the General Stores Warehouse. The guide details step by step instructions on how to process Buyer Card purchases in Maximo. There are three different processes associated with using the Buyer Card.

- Total Purchase Amount between **\$0** and **\$24,999** for items not under a District's Contract.
- Total Purchase Amount between **\$25,000** and **\$90,200** for items not under a District's Contract.
- Total Purchase Amount up to **\$100,000** for items on a District's Contract.

All vendors must accept Master Card as payment.

LOGIN

The requestor performs this function.

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

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

The image shows the Maximo login interface. At the top, there are logos for Tivoli software and IBM. The main heading is "Welcome to Maximo". To the left of the login fields is a large, 3D-rendered nut. The login fields are labeled "User Name:" and "Password:". The User Name field contains the text "danny.lu". The Password field is filled with dots. Below the password field is a "Sign In" button. Underneath the button are two links: "Forgot Password?" and "New User? Register Now". At the very bottom, a small copyright notice reads: "© Copyright IBM Corp. 2007-2012. All rights reserved. See product license for details."

NON-ANNUAL CONTRACT (Total Amount between \$0 and \$24,999)
Page 3-18
ANNUAL CONTRACT (Up to \$100,000)
Page 3-18
NON-ANNUAL CONTRACT (\$25,000-\$90,200)
Page 19-41

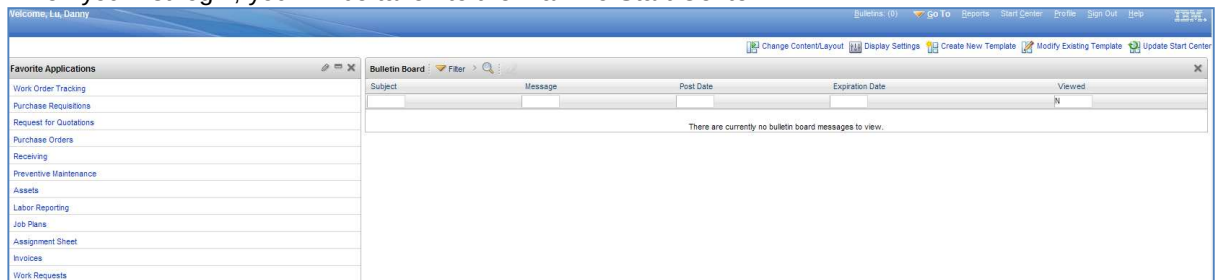


A. NON-ANNUAL CONTRACT (Less than \$25,000) / ANNUAL CONTRACT (up to \$100,000)

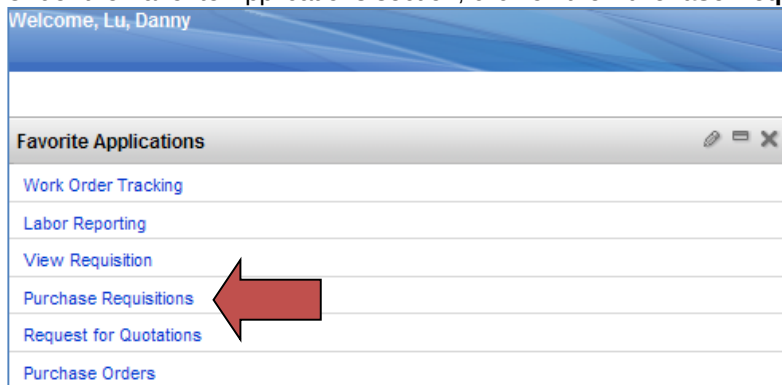
1. CREATE PURCHASE REQUISITION

START CENTER

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

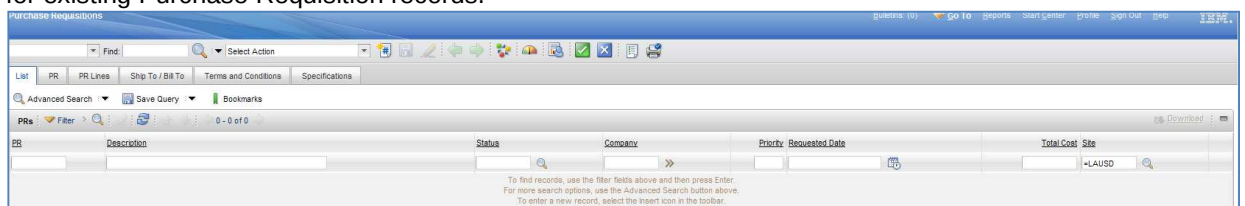


Under the Favorite Applications section, click on the **Purchase Requisition** application.



PURCHASE REQUISITION HOME

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



NEW PURCHASE REQUISITION

Click on the  icon to create a new Purchase Requisition.





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

The screenshot shows the 'Purchase Requisitions' form in Maximo. The 'PR' tab is active. A red arrow points to the 'PR: 169967' field, which is the auto-generated Purchase Requisition number.

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' form with the 'PR' tab selected. A red arrow points to the 'Description' field, which contains the text 'AA 14183033 Fremont SH, Purchase Bookcases'.

Fill in the following fields:

PR Type

Type **BC** or click on the **magnifying glass**  icon next to the **PO Type** field and select **BC (Buyer Card)**.

Supervisor

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

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: Select a vendor with a **SAP Vendor#**. Vendors without a SAP Vendor # will reject during the reconciliation process.

Contract Reference

Annual Contract (up to \$100,000) ONLY. Enter the **LAUSD Contract #** associated with the company whom you wish to purchase the supplies/services.



Sample screen shot

The screenshot shows the 'Purchase Requisitions' form in Maximo. At the top, there is a 'Find:' field and a 'Select Action' dropdown. Below this are tabs for 'List', 'PR', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', and 'Specifications'. The 'PR' tab is selected. The form displays the following information:

- * PR: 169967
- AA 14183033 Fremont SH, Purchase Bookcases
- Req Type: BC

The 'Details' section shows:

- * Priority: 0
- Requested By: 783916
- Supervisor: 271737

The 'Dates' section shows:

- Status Date: 7/5/13 2:20 PM
- Requested Date: 7/5/13 2:20 PM
- Required Date:

The 'Vendor' section shows:

- No Vendor? ☐
- Company: 107679-A INGER INC
- Address: 8930 WINNETKA AVE
- City: NORTHRIDGE
- State/Province: CA
- ZIP/Postal Code: 91324
- Contact: CUSTOMER SERVICE
- SAP Vendor#: 1000003551
- Phone: 818-341-2808
- Contract Reference:
- Contract Revision:

Red arrows point to the 'Save' icon (floppy disk) in the top toolbar, the 'Req Type' field, the 'Details' section, and the 'Vendor' section.

To save, click on the floppy disk . Look for the message at the top of the screen, "**Record has been saved.**"

2. CREATE PR LINE ITEMS

Click on the **PR Lines** tab

The screenshot shows the 'Purchase Requisitions' form with the 'PR Lines' tab selected. The form displays the following information:

- * PR: 169967
- AA 14183033 Fremont SH, Purchase Bookcases
- Req Type: BC

A red arrow points to the 'PR Lines' tab.



Click on the **New Row** button to create a **PR Line**.

The screenshot shows the 'Purchase Requisitions' window. At the bottom right, the 'New Row' button is highlighted with a red arrow. The window displays a table with columns: Line, Item, Description, Quantity, Order Unit, Unit Cost, Storeroom, and Work Order. The table is currently empty, showing 'No rows to display'.

Enter the **Commodity Code** number in the **Item** field. Overtyping the defaulted description to better describe the item. You may also use the long description, Manufacturer, and Model field to better describe the item.

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**.

The screenshot shows the 'PR Lines' window with the 'Item' field empty. The 'Select Value' icon (a magnifying glass with a double arrow) is clicked, opening a dropdown menu. The menu options are: Select Value, Classification, Attributes, Go To, View Item Availability, and View Image. The 'Select Value' option is highlighted with a red arrow.



A new window will appear with a list of Items in Maximo. In this window, you may search for your item by the **Description** column. To select an Item number, click on the **Item Number** or the **Description**.

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

Select Value			
Filter > 1 - 6 of 6 Download			
Item	Description	Commodity Group	Commodity Code
	Freight		
1002100000	Freight and Cargo Containers (Shipping) (See Class 640 For Boxes)	10000	
2954000000	Freight Elevators and Parts		
9584700000	Freight Management Services	95800	
9063400000	Freight Handling; Materials Handling - Architectural	90600	
9999880000	SHIPPING/DELIVERY/FREIGHT CHARGE	99998	9999880000
9628600000	Transportation of Goods and Other Freight Services	96286	

After you click on the **Item Number** or the **Description**, the Item Number will be returned into the **Item** field. Overtyping the defaulted description to better describe the item. You may also use the long description, Manufacturer, and Model field to better describe the item.

PR Lines			Filter >	1 - 1 of 1
	Line	Item	Description	
	1	9628600000	Transportation of Goods and Other Freight Services	

Line Item

* Line: 1

* Line Type: Item

* Item: 9628600000

Transportation of Goods and Other Freight Services

Remarks:



UPDATE THE QUANTITY, UNIT COST AND WORK ORDER NUMBER

After entering the Item number, update the **Quantity, Unit Cost and Work Order number**.

The screenshot shows the 'Quantity and Costs' form. On the left, under 'Quantity and Costs', there are fields for Quantity (3.00), Order Unit (BOX), Issue Unit, Conversion Factor (1.00), Unit Cost (15.50), and * Line Cost (46.50). In the middle, there are fields for Tax Code, Tax (0.00), Loaded Cost (46.50), Contract Reference, Contract Type, Contract Reference Revision, and Schedule. On the right, under 'Charge To', there are fields for Storeroom, Reservation Type (AUTOMATIC), Work Order (14183033), WO Task, Location (S-13475), Asset, and GL Debit Account (CC:000186500). Red arrows point to the Quantity, Unit Cost, and Work Order fields.

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.

The screenshot shows the 'Purchase Requisitions' form. The 'Ship To / Bill To' tab is selected, indicated by a red arrow. The form displays details for PR: 169967, AA 14183033 Fremont SH, Purchase Bookcases, and Req Type: BC.

Enter your M&O Area's section code in the **Ship To** and **Bill To** field. Enter the requestor's employee number in the **Attention** field.

The screenshot shows the 'Ship To' and 'Bill To' tabs. Both tabs have fields for Ship To: 1431, Address: 6620 11TH AVE., City: LOS ANGELES, State/Province: CA, ZIP/Postal Code: 90043, and Attention: 783916. Red arrows point to the 'Ship To' and 'Bill To' fields.

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' form. The 'Purchase Requisition Report' icon is highlighted on the top toolbar, indicated by a red arrow. The form displays details for PR: 169967, AA 14183033 Fremont SH, Purchase Bookcases, Site: LAUSD, and Status: WAPPR.



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



Reporting

Page 1 of 1

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Purchase Requisition

PR NO.: 169967 PR Type: BC PR Issue Date: Jul 5, 2013 2:20 PM
Requested Delivery Date: Payment Terms: Freight Terms:
Requestor: 783916 Responsible Person:
PR Modified By: DANNY.LU Area/Region: M&O CENTRAL
Contract: Exp Date:
AA 14183033 Fremont SH, Purchase Bookcases

Vendor:	Ship To:	Bill To:
Vendor Code: 107679-A	Name: M&O CENTRAL OFFICE	Name: M&O CENTRAL OFFICE
Name: W W GRADNER INC	Address: 333 S BEAUDRY AVENUE, 22ND FLOOR	Address: 333 S BEAUDRY AVENUE, 22ND FLOOR
Address: 8930 WINNETKA AVE	LOS ANGELES, CA, 90017	LOS ANGELES, CA, 90017
NORTHridge, CA, 91324	Phone:	Phone:
Phone: 818-341-2808	FAX:	FAX:
FAX: 877 454 7647	Attention:	Attention: Mr. Danny
Attention: CUSTOMER SERVICE		

The Requestor is responsible for signing the Requestor line. Requestor to obtain the required signature in the **Approved By** field. The **Approved By** signature is determined by the Dollar amount of the requisition. **Approver** must verify that the vendor quote and PR lines match prior to approving the requisition.

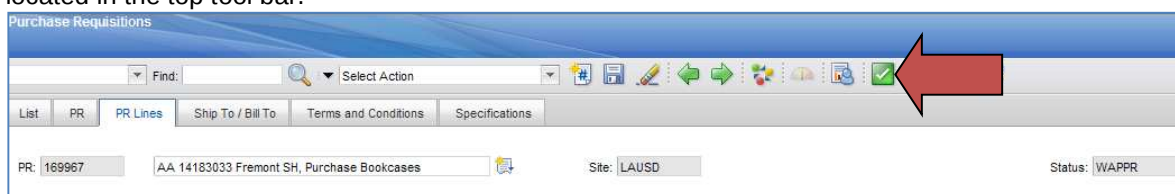
CPM signs Requisitions for up to \$25,000, **AFSD** for \$25,001-\$50,000, **RFD** for \$50,001-\$100,000, and **Deputy Director** for over \$100,000.

Submit the signed **Purchase Requisition** report to the **Buyer Card holder** for processing.

5. APPROVE PURCHASE REQUISITION

The Buyer Card holder performs this function.

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



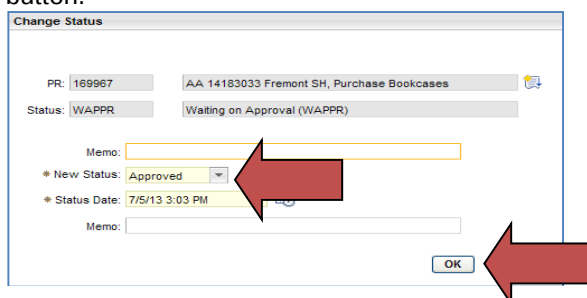
Purchase Requisitions

Find: Select Action

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

PR: 169967 AA 14183033 Fremont SH, Purchase Bookcases Site: LAUSD Status: WAPPR

The **Change Status** window will appear with **Approved** selected as the **New Status**. Click on the **OK** button.



Change Status

PR: 169967 AA 14183033 Fremont SH, Purchase Bookcases

Status: WAPPR Waiting on Approval (WAPPR)

Memo:

* New Status: Approved

* Status Date: 7/5/13 3:03 PM

Memo:

OK



6. CREATE PURCHASE ORDER

On the **Purchase Requisition** record, click on the **Select Action** dropdown and select **Create PO**.

The screenshot shows the 'Purchase Requisitions' window. The 'Select Action' dropdown menu is open, displaying options: Change Status, View History, Create PO, Create Contract, View Related Records, Unit of Measure and Conversion, Attachment Library/Folders, Duplicate Purchase Requisition, Add to Bookmarks, Run Reports, and Cognos Reporting. The 'Create PO' option is highlighted. Red arrows point to the 'Select Action' dropdown and the 'Create PO' option. The background shows the 'Details' tab with fields for Priority (0), Requested By (783916), Supervisor (271737), and Dates (Status Date: 7/5/13 3:03 PM, Requested Date: 7/5/13 2:20 PM, Required Date:).

The **Create PO** window will appear. Click on the **Autonumber** button to allow the system to auto generate a new PO number.

The 'Create PO' window is shown. It contains a text box for the PO number and a description: 'AA 14183033 Fremont SH, Purchase Bookcases'. Below the text box are two buttons: 'Autonumber' and 'Cancel'. A red arrow points to the 'Autonumber' button. The window also includes a help icon and instructions: 'Enter a purchase order number or generate one by clicking Autonumber. Click OK to create the purchase order.'

Write down the auto generated PO number and click on the **OK** button.

The 'Create PO' window is shown again. The PO number '6838' has been entered in the text box. A red arrow points to the 'OK' button. The window also includes a help icon and instructions: 'Enter a purchase order number or generate one by clicking Autonumber. Click OK to create the purchase order.'

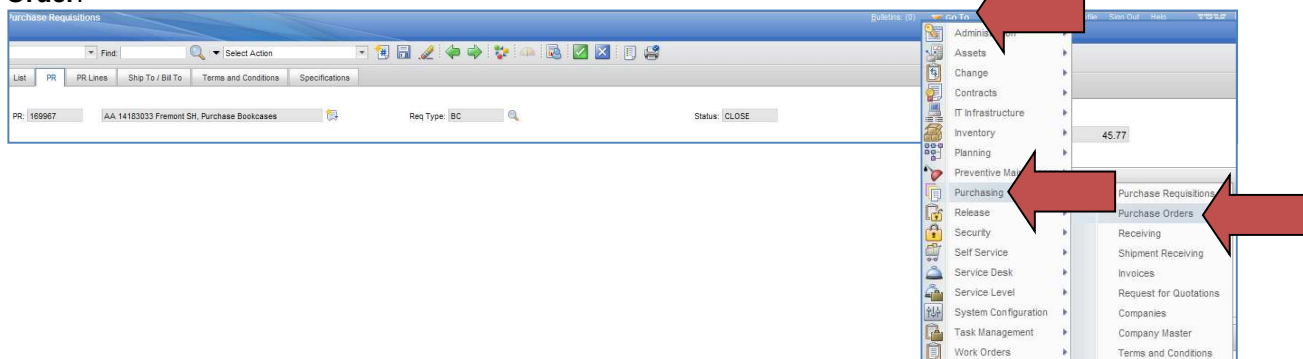
The Purchase Requisition status will automatically be changed to **CLOSE**.

The screenshot shows the 'Purchase Requisitions' window. The 'Status' field now displays 'CLOSE'. A red arrow points to the 'Status: CLOSE' field. The background shows the 'Details' tab with fields for Priority (0), Requested By (783916), Supervisor (271737), and Dates (Status Date: 7/5/13 3:03 PM, Requested Date: 7/5/13 2:20 PM, Required Date:).

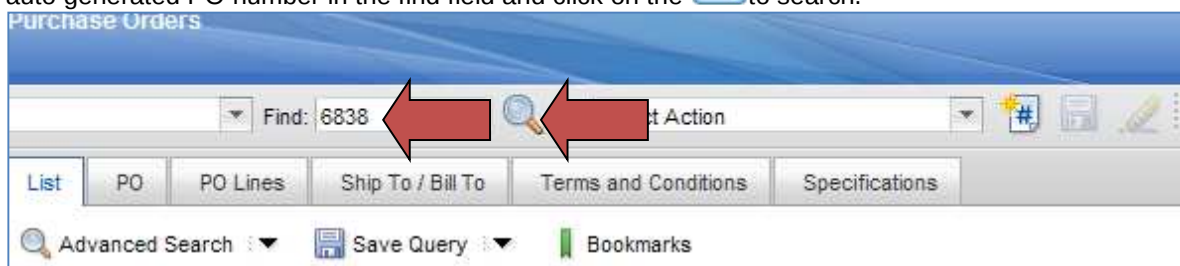


APPROVE PO

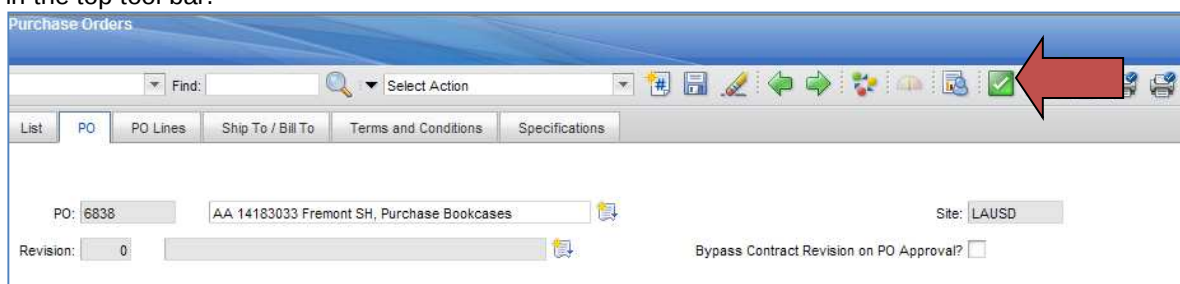
Click on the **Go To** button, hover your mouse over the **Procurement** module and select **Purchase Order**.



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



On the **Purchase Order** record, change the status to **APPR (Approve)**. Click on the  icon located in the top tool bar.





The **Change Status** window will appear with **Approved** selected as the **New Status**. Click on the **OK** button.

The screenshot shows the 'Change Status' window in Maximo. It contains fields for PO: 6838, AA 14183033 Fremont SH, Purchase Bookcases, Revision: 0, and Status: WAPPR (Waiting on Approval (WAPPR)). There are two memo fields. The 'New Status' dropdown is set to 'Approved (APF)' and the 'Status Date' is '7/5/13 3:24 PM'. A red arrow points to the 'Approved (APF)' dropdown, and another red arrow points to the 'OK' button at the bottom right.

7. PRINT PURCHASE ORDER DETAILS REPORT AND PLACE ORDER WITH VENDOR

The Buyer Card holder performs this function.

On the Purchase Order record, click on the  icon to run/print the **Purchase Order Details** report.

The screenshot shows the 'Purchase Order' record in Maximo. It includes a toolbar with various icons. A red arrow points to the 'Print' icon (a printer symbol) in the toolbar. Below the toolbar, there are tabs for 'List', 'PO', 'PO Lines', 'Ship To / Bill To', 'Terms and Conditions', and 'Specifications'. The PO details are visible, including PO: 6838, AA 14183033 Fremont SH, Purchase Bookcases, and Site: LAUSD.

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.

The screenshot shows the 'BIRT Report Viewer' window. It displays the 'Purchase Order' report for Los Angeles Unified School District. The report includes the PO NO.: 6838, Purchase Req No.: 303265, and PO Type (from PR or RFQ): BC. A red arrow points to the printer icon in the toolbar at the top of the report viewer.

Buyer Card Holder signs the **PO Details** report. Attach the signed **PR Report** with the **PO Report** and submit to **Requestor** for confirmation and filing.

Buyer Card Holder to submit a copy of the **PO Details** report or provide the **PO Number** to Vendor to initiate purchase.



8. OPTIONAL: MODIFY PURCHASE ORDER

The Requestor performs this function

To modify a Buyer Card Purchase Order, On the PO record, click on **the Select Action** dropdown and select **Revise PO**.

Purchase Orders
danny.lu on MaxCron01

Find: [] Select Action []

List PO PO Lines Ship To / Bill To Terms

PO: 6838 AA 14183033 Fremont SH, t

Revision: 0

Site: LAUSD

Bypass Contract Revision on PO Approval? []

Select Action dropdown options:
Change Status
View History
Copy PR Line Items To PO
Create Contract
Complete Receipts
Revise PO
View Revision History

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

Revise PO

PO: 6838 * Modify line one cost.

Revision: 1

Internal Change? []

Allow Receipts and Invoices? [x]

OK

After you click **OK**, you will be taken to your revised **PO record**. Noticed that the Revision number is now 1 and the status is **PNDREV (Pending Revision)**.

Purchase Orders
danny.lu on MaxCron01

Find: [] Select Action []

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

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases

Revision: 1

Site: LAUSD

Status: PNDREV

Bypass Contract Revision on PO Approval? []



Maximo 7.5 / Buyer Card Guide

Click on the **PO Lines** tab to make your modifications. Click on the floppy disk icon to save.

Purchase Orders
Janny Ju on MaxCron01

Find: [] Select Action []

BMXAA42951 - Record has been saved.

List PO **PO Lines** Terms and Conditions Specifications

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases Site: LAUSD Status: PNDREV

Revision: 1 Modify line one cost.

PO Lines: Filter > 1 - 1 of 1

Line	Item	Description	Quantity	Order Unit	Unit Cost	Shipped	Work Order
1	3207400000	Screws, Wood 1/2"	3.00	EA	25.00		43

Vendor Items Contract Items Select Spare Parts Vendor Analysis

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

Purchase Orders
Janny Ju on MaxCron01

Find: [] Select Action []

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

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases Site: LAUSD

Revision: 1 Modify line one cost.

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 1

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Modified Purchase Order

PO NO.: 6838 Purchase Req No.: Modify line one cost. PO Type (from PR or RFQ):

PO Revision No.: 1

PO Date: 9/6/13 Vendor: 107679-A Payment Terms:

Requested Delivery Date: Freight Terms:

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

CPM signs Requisitions for up to \$25,000, **AFSD** for \$25,001-\$50,000, **RFD** for \$50,001-\$100,000, and **Deputy Director** for over \$100,000.

Submit the signed **Modified PO** report to **Buyer Card Holder** for processing.

The Buyer Card holder performs this function.



Go to the **Revised PO** record in the Purchase Order application and change the status to **APPR** (Approve).

Note: Make sure you are on the **Revision 1** PO. If you are not, click on the **List** tab and select the revision 1 PO.

The screenshot shows the Maximo Purchase Order application interface. At the top, a message bar indicates 'BMXAA42051 - Record has been saved.' Below this, the 'List' tab is selected, showing a table with columns: PO, PO Lines, Ship To / Bill To, Terms and Conditions, and Specifications. The first row is highlighted, showing PO: 6838, AA 14183033 Fremont SH, Purchase Bookcases, Site: LAUSD, and Status: PNDREV. A red arrow points to the 'Revision: 1' field. Below the table, the 'Details' section shows fields for Type (STD), Buyer Company, Buyer, Priority (0), Receipts (NONE), and Contract #. The 'Vendor' section shows Company (107679-A), W W GRANGER INC, Address (8930 WINNETKA AVE), City (NORTHRIDGE), and State/Province (CA). On the right, the 'Dates' section shows a 'Change Status' dialog box. The dialog box has fields for PO (6838), Revision (1), Status (PNDREV), and Pending Revision. The 'New Status' dropdown is set to 'Approved (APPR)' and the 'Status Date' is '9/9/13 9:54 AM'. A red arrow points to the 'New Status' dropdown. At the bottom right of the dialog box is an 'OK' button, with a red arrow pointing to it.

Contact vendor and place the order per the **Modified Purchase Order**. Submit **Modified Purchase Order** report back to the requestor for filing/holding until Invoice.

9. ORDER/INVOICE RECEIVED, REQUESTOR TO RECEIVE LINE ITEM IN RECEIVING APPLICATION AND SUBMIT RECEIPT/PACKING LIST AND INVOICE TO BUYER CARD HOLDER

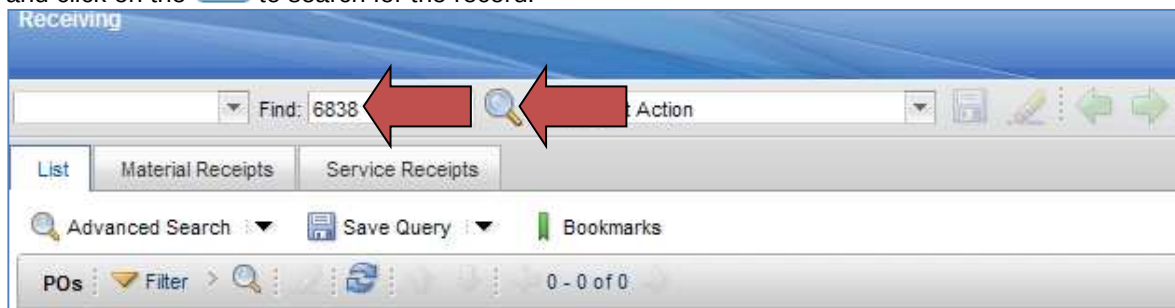
The Requestor performs this function

After receiving the item(s) and Invoice from the vendor, Requestor to receive item in Maximo. In the **Start Center** of Maximo, under **Favorite Applications**, click on the **Receiving** application.

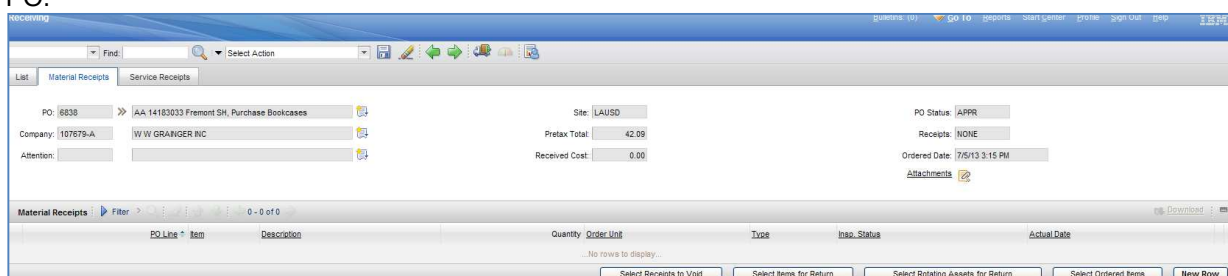
The screenshot shows the Maximo Start Center interface. At the top, a message bar says 'Welcome, Lu, Danny'. Below this, the 'Favorite Applications' section is visible, showing a list of applications: Work Order Tracking, Labor Reporting, View Requisition, Purchase Requisitions, Request for Quotations, Purchase Orders, Receiving, and Preventive Maintenance. A red arrow points to the 'Receiving' application.



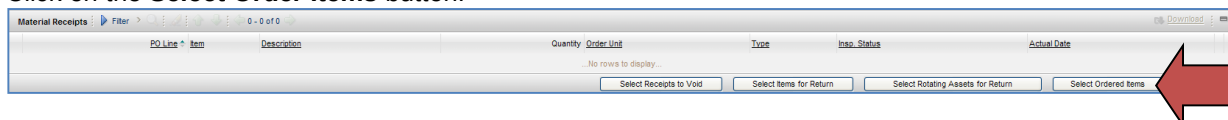
In the **Receiving** application, enter **PO number** found on the **Purchase Order report** in the **Find** field and click on the  to search for the record.



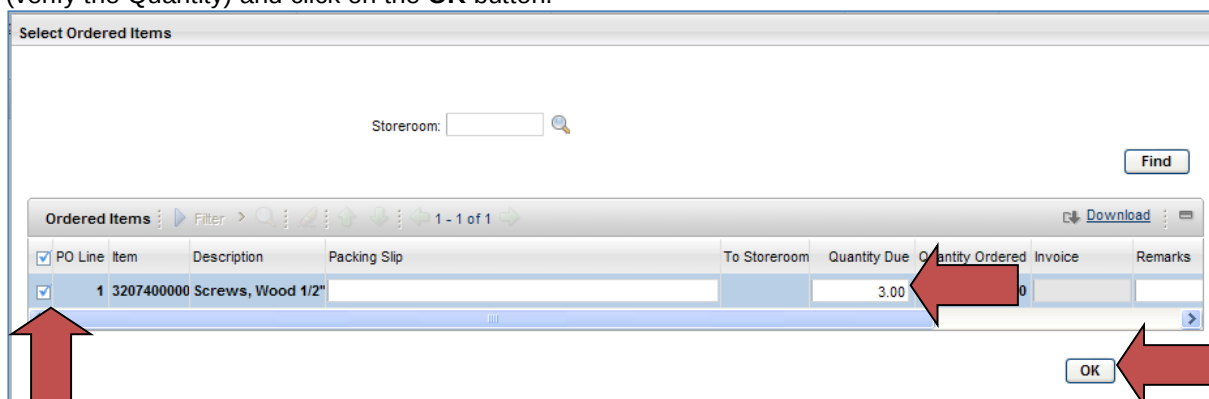
You will then be taken to the **Materials Receipt** tab of the record. **Note:** Make sure you are on the correct PO (if there are revisions). If you are not, click on the **List** tab and select the correct revised PO.



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



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





Maximo 7.5 / Buyer Card Guide

You will be taken back to the previous screen. Click on the floppy disk icon to save the record. The Receipts status will be changed to **COMPLETE** if all items were received.

The screenshot shows the 'Material Receipts' screen in Maximo 7.5. The top toolbar contains a floppy disk icon for saving the record. The 'Receipts' status is displayed as 'COMPLETE'. The screen also shows details for PO 16838, Company 1107678-A, and a list of items including 'Screws, Wood 1/2\"

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

Inspected By	The act of examining goods that have been delivered to determine conformance to what was ordered via the purchase order. • Verify that what was ordered conforms to purchase document (purchase order, statement of work, specifications, attachments, etc...) • Verify the quantity ordered against the quantity shipped or delivered. • Inspect for damage or breakage. • Verify that the unit of measurement count is correct. - o Example 1: If the unit of measurement on the purchase order is 200 square feet of playground matting, measure actual installed matting square footage. - o Example 2: If the unit of measurement on the purchase order is one dozen, count 12 in the unit package. • Verify that delivery documentation (packing slip, certifications, etc.) is acceptable. • Verify that packaging integrity is preserved (no leakage, damages, etc.). • If needed, take photo of goods/services for confirmation of inspection.
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.

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

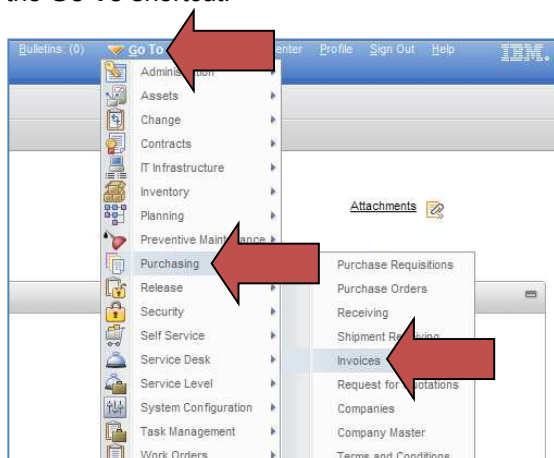
Submit the **PO report**, **Purchase receipt(s)**, **Packing Slip** and **Vendor Invoice** to **Buyer Card Holder** to complete the invoice record and reconcile the purchase in SAP.

10. CREATE MAXIMO INVOICE RECORD, CHANGE MAXIMO INVOICE STATUS TO PAID

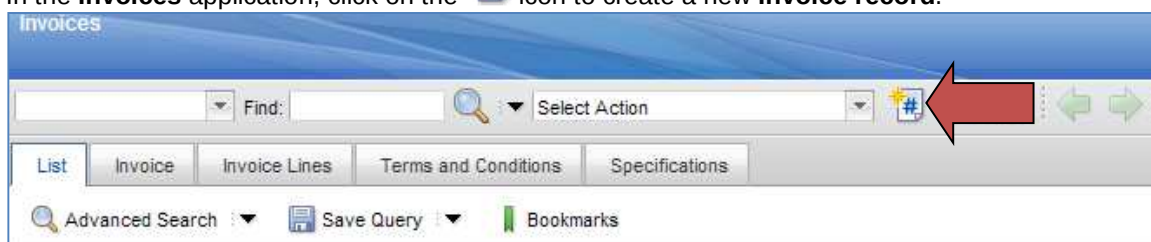
The Buyer Card holder performs this function.



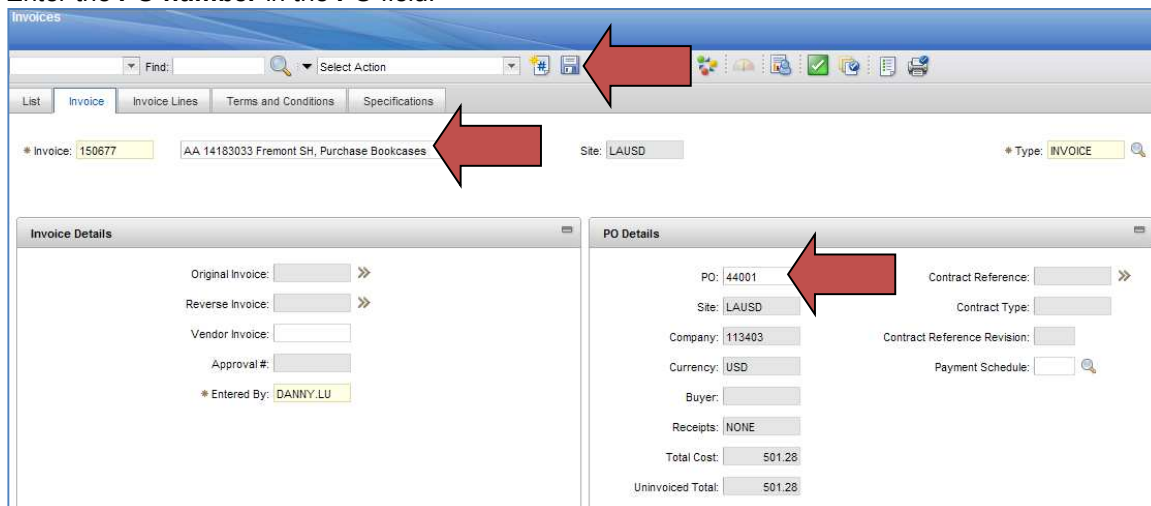
Go to the **Invoice** application by either through the **Start Center Favorite Applications** list or utilizing the **Go To** shortcut.



In the **Invoices** application, click on the  icon to create a new **Invoice** record.



A new Invoice number will auto-populate. Type in the same **PO description** in the description box. Enter the **PO number** in the **PO** field.



Click on the floppy disk  icon to save.



Click on the **Invoice Lines** tab and click on the **Copy PO Lines** button.

Find: 150677 Select Action

Invoice: 150678 AA 14183033 Fremont SH, Purchase Bookcases

Pretax Total: 0.00
Line Total: 0.00
Invoice Total: 0.00

Type: INVOICE
Status: ENTERED
Site: LAUSD

Invoice Lines Filter 0 - 0 of 0

Line	Item	Description	PO	PO Site	Quantity	Unit Cost	Tax
...No rows to display...							

Copy PO Lines

The **Copy PO Lines** window appears. Check the lines that match the Invoice and click **OK**.

Copy PO Lines

☒ View all lines
☐ View all lines that are not invoiced

PO Lines Materials Services

PO Lines Filter 1 - 4 of 4 Download

PO	Line	Item	Description	Quantity	Uninvoiced Quantity	Line Cost	Uninvoiced Cost	Site
☒	44001	1	9628600000 Shipping and Handling	5.00	5.00	100.00	100.00	LAUSD
☒	44001	2	3600500000 Wood Adhesive	2.00	2.00	259.90	259.90	LAUSD
☒	44001	3	3651000000 Floor Brush	1.00	1.00	32.76	32.76	LAUSD
☒	44001	4	4453000000 Staple Gun	1.00	1.00	65.00	65.00	LAUSD

OK

The **PO Lines** will be brought back over to the **Invoice Line** tab.

Find: 150677 Select Action

Invoice: 150678 AA 14183033 Fremont SH, Purchase Bookcases

Pretax Total: 457.66
Line Total: 457.66
Invoice Total: 501.26

Type: INVOICE
Status: ENTERED
Site: LAUSD

Invoice Lines Filter 1 - 4 of 4 Download

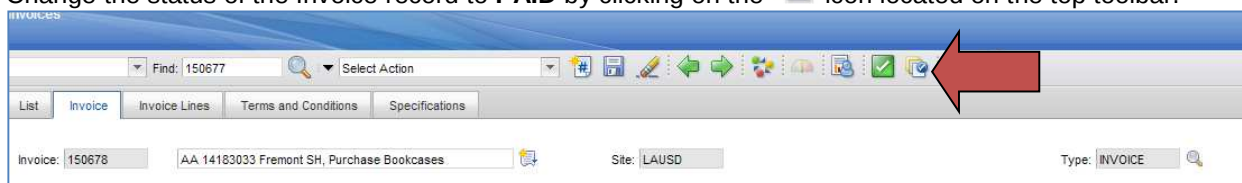
Line	Item	Description	PO	PO Site	Quantity	Unit Cost	Tax	Line Cost
1	9628600000	Shipping and Handling	44001	LAUSD	5.00	20.00	8.75	100.00
2	3600500000	Wood Adhesive	44001	LAUSD	2.00	129.95	25.34	259.90
3	3651000000	Floor Brush	44001	LAUSD	1.00	32.76	3.19	32.76
4	4453000000	Staple Gun	44001	LAUSD	1.00	65.00	6.34	65.00

Copy PO Lines Select Consignment Transactions Distribute Costs New Row

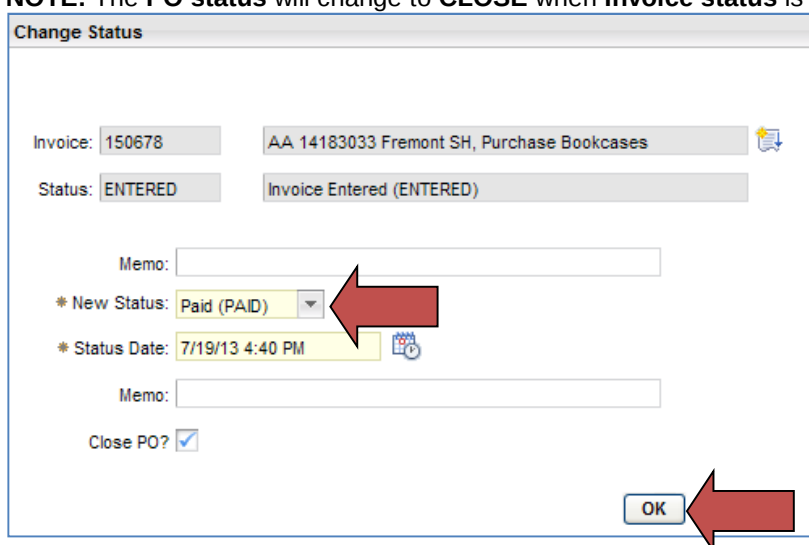
Click on the floppy disk  icon to save the record.



Change the status of the Invoice record to **PAID** by clicking on the  icon located on the top toolbar.



The **Change Status** window will appear with **Paid (PAID)** as the selected status. Click **OK**.
NOTE: The **PO status** will change to **CLOSE** when **Invoice status** is changed to **PAID**.



11. RECONCILE PURCHASE IN SAP

The Buyer Card holder performs this function.

Reconcile the purchase in SAP. SAP reconciliation instructions can be downloaded from <http://www.laschools.org/new-site/mo/awms> under Procurement, titled, "**Buyer Card Reconcile Process (SAP).**"

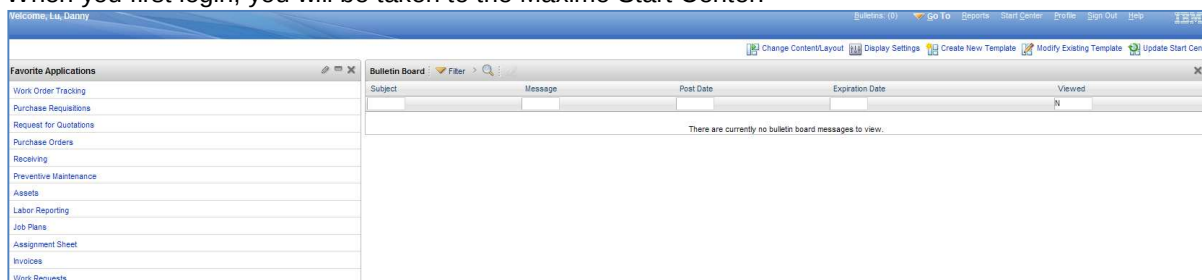


B. NON-ANNUAL CONTRACT PURCHASE (Total Purchase Amount between \$25,000 and \$90,200)

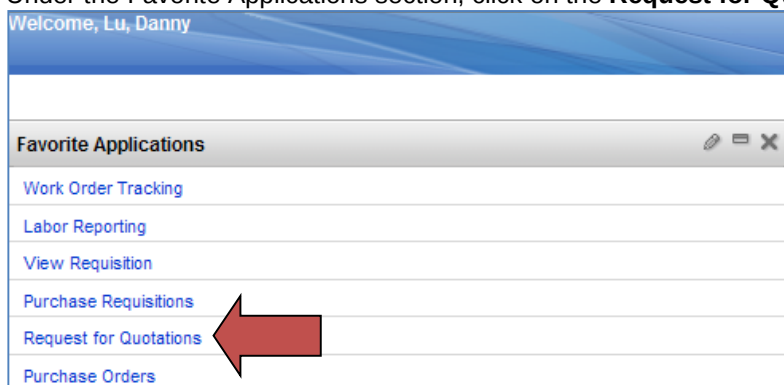
1. CREATE PURCHASE FOR QUOTATION

START CENTER

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

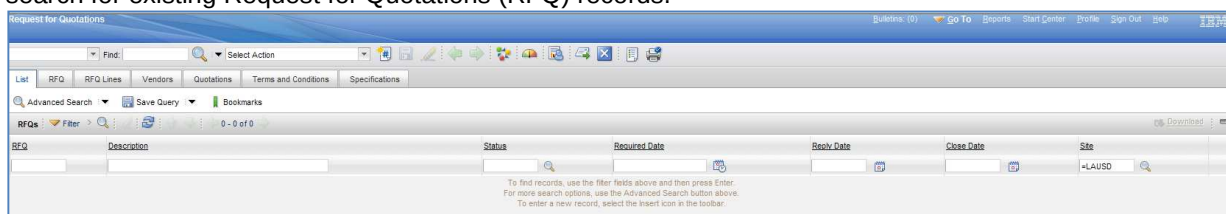


Under the Favorite Applications section, click on the **Request for Quotations** application.



REQUEST FOR QUOTATIONS HOME

You will then be taken to the Request for Quotations home screen; in this screen, where you can search for existing Request for Quotations (RFQ) records.



NEW REQUEST FOR QUOTATIONS RECORD

Click on the  icon to create a new RFQ record.





A new **RFQ** number will auto generate.

Request for Quotations

Find: [] Select Action []

List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

* RFQ: 7728 [] Status: INPRG

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.

Request for Quotations

Find: [] Select Action []

List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

* RFQ: 7728 [] AA 14183033 Fremont SH [] Status: INPRG

Fill in the following fields:

- Type** Type **BC** or click on the **magnifying glass**  icon next to the **PO Type** field and select **BC (Buyer Card)**.
- Craft** Enter the **two-letter Craft Code** of the craft responsible for the **BC**.
- Bid Due** Type the **Date** and **Time** that **Quotes** (or Bids) must be received by. You may use the **Calendar**  icon next to the **Bid Due Date** field to select a **Date**.
- Ship To/Reply To** Enter your M&O Area's section code in the **Ship To** and **Reply To** field. Enter the requestor's employee number in the **Attention** field.



Sample screen shot

The screenshot shows the Maximo Buyer Card form for RFQ 7728. The form is divided into several sections: Details, Dates, Terms, Ship To, and Reply To. Red arrows point to specific fields: 'Priority' in the Details section, 'Required Date' in the Dates section, 'Ship To' address fields, and 'Reply To' address fields.

2. CREATE THE RFQ LINES

Click on the **RFQ Lines** tab

The screenshot shows the Maximo Buyer Card form with the 'RFQ Lines' tab selected. A red arrow points to the 'RFQ Lines' tab.

Click on the **New Row** button to create a RFQ Line.

The screenshot shows the Maximo Buyer Card form with the 'RFQ Lines' tab selected. A red arrow points to the 'New Row' button at the bottom right of the form.



Enter the **Commodity Code** number in the **Item** field. Overtyping the defaulted description to better describe the item. You may also use the long description, Manufacturer, and Model field to better describe the item.

RFQ Lines: Filter > 1 - 1 of 1

Line	Item	Description	Storeroom
1	3207400000	Screws, Wood 1/2	

Line Item

* Line: 1

Line Type: Item

Item: 3207400000 Screws, Wood 1/2

Manufacturer: PHILLIPS

Model: A123

Category:

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**.

RFQ Lines: Filter > 1 - 1 of 1

Line	Item	Description
1		

Line Item

* Line: 1

Line Type: Item

Item:

Quantity:

Order Unit:

Issue Unit:

Conversion Factor:

Manufacturer:

Model:

Category:

Commodity Group: 32000

Commodity Code:

Remarks:

Select Value

- Classification
- Attributes
- Go To
- View Item Availability
- View Image

A new window will appear with a list of Items in Maximo. In this window, you may search for your item by the Description column. To select an Item number, click on the **Item Number** of the **Description**.

Note: The Item number you select must have a Commodity Group in order for the purchase to be reconciled in SAP.

Select Value			
Filter > 1 - 20 of 838			
Item	Description	Commodity Group	Description
	SCREW		
0054201224	WHEEL GRINDING SCREW -ON O7"	00500	RASIVES
0450600167	BLADE SCREW, SAWZALL, MILWAUKEE, 6517, #42680677	04500	HOUSEHOLD APPLIANCES AND EQUIPMENT
0450600284	FLOOR MACHINE, CORD HOOD CLAMP/SCREWS, HILD, PRO11-20, #13832	04500	HOUSEHOLD APPLIANCES AND EQUIPMENT



After you click on the **item number** or the **Description**, the Item Number will be returned to your **item** field. Overtyping the defaulted description to better describe the item. You may also use the long description, Manufacturer, and Model field to better describe the item.

UPDATE THE QUANTITY AND WORK ORDER NUMBER

After entering the Item number, update the **Quantity**, **Order Unit** and **Work Order** number.

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



3. PRINT AND DISTRIBUTE THE REQUEST FOR QUOTATION FORM TO PROSPECTIVE VENDORS

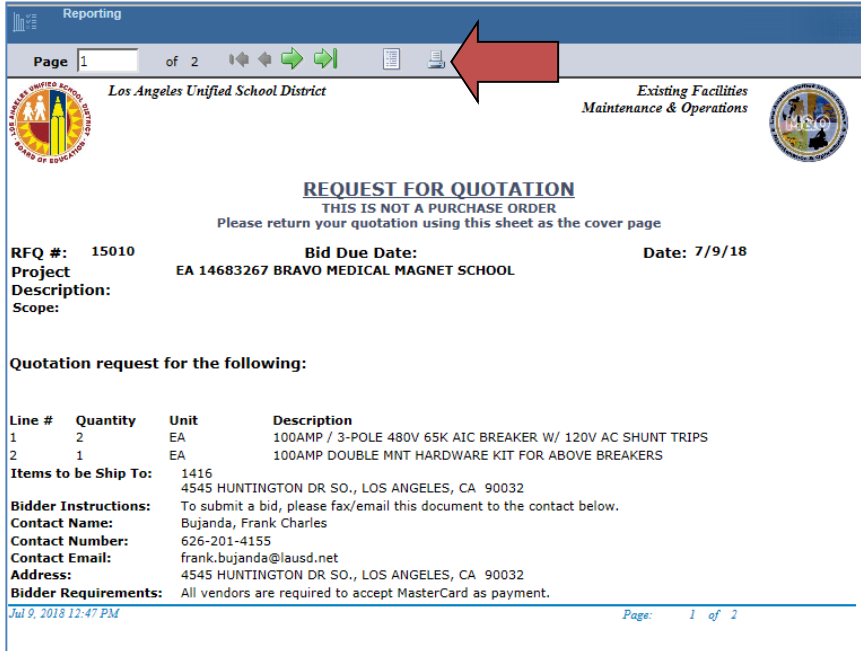
Click on the **Select Action dropdown** and select **Run Reports**.

A **Reports** window will appear. Click on the **Request for Quotation Form** report.

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



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



Reporting

Page 1 of 2

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

REQUEST FOR QUOTATION
THIS IS NOT A PURCHASE ORDER
Please return your quotation using this sheet as the cover page

RFQ #: 15010 Bid Due Date: Date: 7/9/18
Project: EA 14683267 BRAVO MEDICAL MAGNET SCHOOL
Description:
Scope:

Quotation request for the following:

Line #	Quantity	Unit	Description
1	2	EA	100AMP / 3-POLE 480V 65K AIC BREAKER W/ 120V AC SHUNT TRIPS
2	1	EA	100AMP DOUBLE MNT HARDWARE KIT FOR ABOVE BREAKERS

Items to be Ship To: 1416
4545 HUNTINGTON DR SO., LOS ANGELES, CA 90032

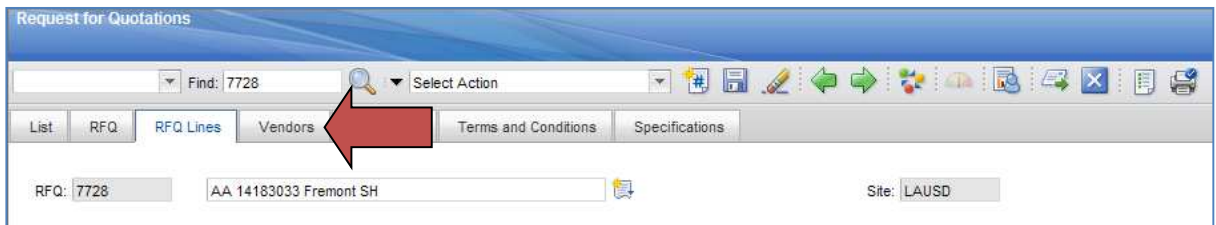
Bidder Instructions: To submit a bid, please fax/email this document to the contact below.
Contact Name: Bujanda, Frank Charles
Contact Number: 626-201-4155
Contact Email: frank.bujanda@lausd.net
Address: 4545 HUNTINGTON DR SO., LOS ANGELES, CA 90032
Bidder Requirements: All vendors are required to accept MasterCard as payment.

Jul 9, 2018 12:47 PM Page: 1 of 2

Submit **Request for Quotation Form** to a minimum of prospective vendors.

4. ENTER PROSPECTIVE VENDORS IN THE RFQ, VENDORS TAB

Click on the **Vendors** tab.



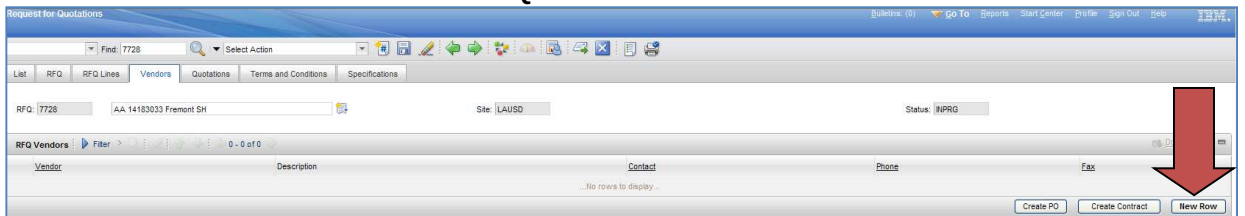
Request for Quotations

Find: 7728 Select Action

List RFQ RFQ Lines **Vendors** Terms and Conditions Specifications

RFQ: 7728 AA 14183033 Fremont SH Site: LAUSD

Click on the **New Row** button to create a **RFQ Vendors Line**.



Request for Quotations

Find: 7728 Select Action

List RFQ RFQ Lines **Vendors** Quotations Terms and Conditions Specifications

RFQ: 7728 AA 14183033 Fremont SH Site: LAUSD Status: INPRG

RFQ Vendors: 0 of 0

Vendor	Description	Contact	Phone	Fax
No rows to display.				

Create PO Create Contract **New Row**



In the **Details** view, enter the ***Vendor Number** in the **Vendor** field.

RFQ Vendors Filter > 1 - 1 of 1

Vendor	Description
113403	OLD MASTER PRODUCTS INC

Details

* Vendor: 113403 MASTER PRODUCTS INC

Contact: CARL HILASKI

SAP Vendor#: 1000000244

Phone: 323-291-0677

Fax:

E-mail:

* Currency: USD

Note: The Vendor Number is typically the old IFS Vendor Number, however in some cases; it may be the new SAP Vendor Number. It is important that your Vendor has a SAP Vendor Number; a buyer card purchase can only be reconciled against vendors who have a SAP Vendor #.

If you do not know the **Vendor** number, you may search for it by clicking on the  icon to the right of the vendor field and click on **Select Value**.

RFQ Vendors Filter > 1 - 1 of 1

Vendor	Description

Details

* Vendor:

Contact:

Customer #:

Select Value

Go To Companies



A **Select Value** list of vendors will appear. You may search for a vendor by the **Description**, **SAP Vendor#** or **Address**. Type in any value and hit enter to search. To select the vendor, click on the **Company number** or **Description**.

Select Value						
Filter > 1 - 20 of 141						
Company	Description	T	SAP Vendor#	Address	City	State/Province
	PACIFIC					
103074	Cal Pacific Salvage Inc.	V		7930 Marbrisa Street	Huntington Park	CA
154192	TRI-PACIFIC SUPPLY	V		4345 PACIFIC STREET	ROCKLIN	CA
104843	Cummins Cal. Pacific Inc.	V		1105 S. Greenwood Ave.	Montebello	CA
104844	Cummins Cal Pacific, Inc.	V		1939 Deer Ave.	Irvine	CA
133193	Scurr Pacific Sales	V		31010 San Clemente St.	Hayward	CA
107707-A	Grating Pacific	V		4839 Patata St.	Cudahay	CA
113655	3 WIRE PACIFIC COAST	V	1000003803	23839 BANNING BLVD	CARSON	CA
113657	Pacific Coast Sales	V		2166 W Broadway #556	Anaheim	CA
113666	Pacific Design Concepts / Iron Mountain Forge	V		P O Box 1909	Huntington Beach	CA

The select **Vendor** information will be populated in your **RFQ Vendors** line.

RFQ Vendors		Filter >	1 - 1 of 1
Vendor	Description		
113655	3 WIRE PACIFIC COAST		
Details			
* Vendor:	113655	PACIFIC COAST	
Contact:	MARSHA		
SAP Vendor#:	1000004781		
Phone:	800 531-1111		
Fax:	310-515-5564		
E-mail:			
* Currency:	USD		

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

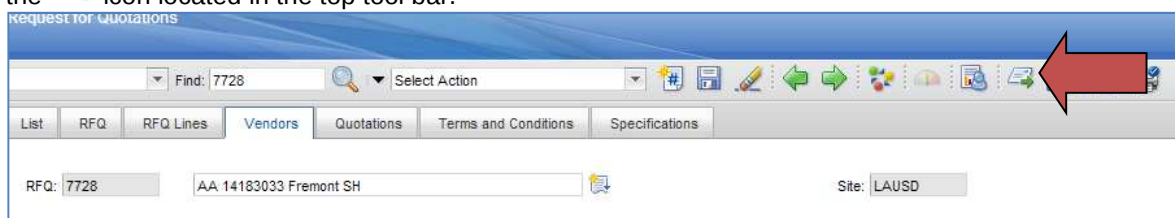
Note: If you cannot identify the vendor from the list, you may contact the M&O IT and Analysis Unit (Danny.lu@lausd.net or John.herweg@lausd.net) and request a **Temporary Vendor Number**. Temporary Vendors may bid on jobs; however a contract cannot **not** be Awarded to a Temporary Vendor.

If a Temporary Vendor is the lowest bidder, to award the vendor you must have them register for a permanent SAP Vendor number and contact the M&O IT and Analysis Unit to create the permanent vendor number in Maximo. Update the vendor number in the RFQ and award.

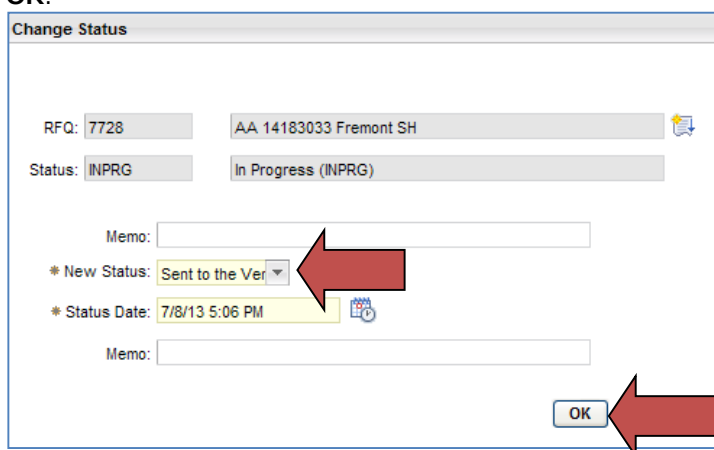


5. CHANGE RFQ STATUS TO SENT AND ENTER VENDOR QUOTES IN QUOTATIONS TAB

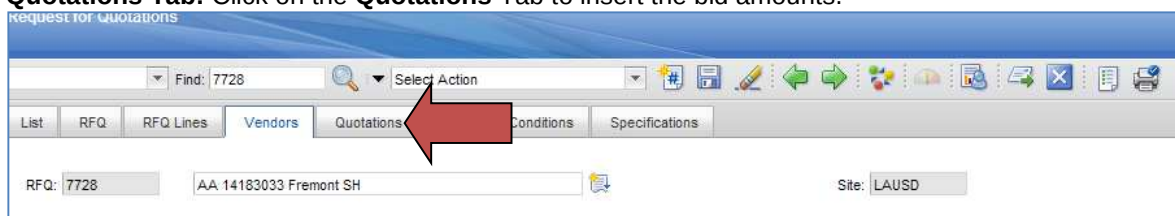
On the **Request for Quotations** record, change the status to **SENT TO VENDOR (SENT)**. Click on the  icon located in the top tool bar.



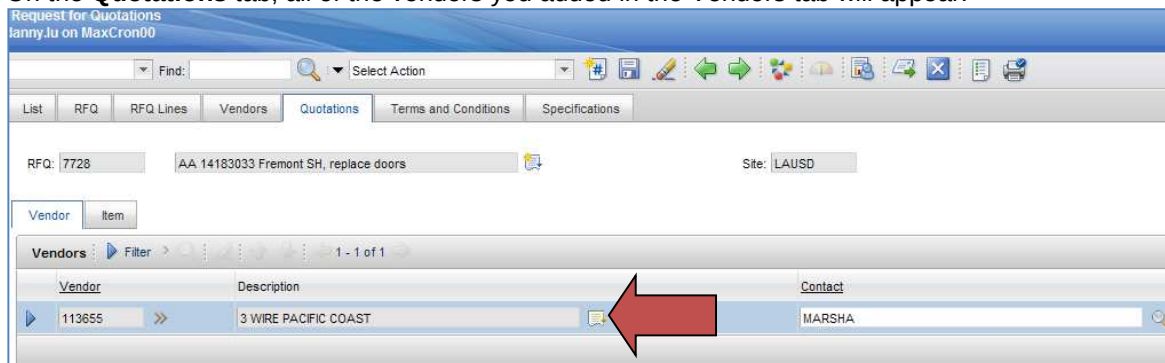
A **Change Status** window will appear. Make sure the New **Status** is **Sent to Vendor (SENT)**. Click **OK**.



Quotations Tab: Click on the **Quotations** Tab to insert the bid amounts.



On the **Quotations** tab, all of the vendors you added in the Vendors tab will appear.





Highlight the vendor row by clicking on the **Description**. The color of the row will turn blue.

Request for Quotations
lanny.ju on MaxCron00

Find: [] Select Action []

List RFQ RFQ Lines Vendors **Quotations** Terms and Conditions Specifications

RFQ: 7728 AA 14183033 Fremont SH, replace doors Site: LAUSD

Vendor Item

Vendors Filter 1 - 1 of 1

Vendor	Description	Contact
113655	3 WIRE PACIFIC COAST	MARSHA

Under the **Quotations for Vendor** section, click on the **Select RFQ Lines** button.

Vendor Item

Vendors Filter 1 - 1 of 1

Vendor	Description	Contact	Total Bid Amount	Phone	Fax	Awarded?
113655	3 WIRE PACIFIC COAST	MARSHA	800 531-1111	310-515-5564		

Create PO Create Contract New Row

Quotations for Vendor Filter 0 - 0 of 0

Line	Item	Description	Manufacturer	Quantity	Order Unit	Currency	Unit Cost	Base Currency	Base Unit Cost	Awarded?
...No rows to display...										

Select RFQ Lines

A **Select RFQ Lines** window will appear. Click on the **checkbox** for the line(s) that the vendor submitted a quote/bid for and click on the **OK** button.

Select RFQ Lines

RFQ Lines Filter 1 - 1 of 1

Line	Item	Description	Storeroom	Quantity	Order Unit	Conversion Factor	Location	GL Debit Account	Required Date
☐	1	0054201224 WHEEL SCREW FOR DOOR REPLACEMENT		1.00	EA	1.00	S-13475	CC.000186500	

OK

The **RFQ Line** will be brought back over to the **Quotations for Vendors** section.

Vendors Filter 1 - 1 of 1

Vendor	Description	Contact	Total Bid Amount	Phone	Fax	Awarded?
113655	3 WIRE PACIFIC COAST	MARSHA	800 531-1111	310-515-5564		

Create PO Create Contract New Row

Quotations for Vendor 113655 Filter 1 - 1 of 1

Line	Item	Description	Manufacturer	Quantity	Order Unit	Currency	Unit Cost	Base Currency	Base Unit Cost	Awarded?
1	0054201224	WHEEL SCREW FOR DOOR REPLACEMENT	PHILIPS	1.00	EA	USD		USD	0.00	

Select RFQ Lines Award All

Enter the **Bid/Quote** amount in the **Unit Cost** field.

Vendors Filter 1 - 1 of 1

Vendor	Description	Contact	Total Bid Amount	Phone	Fax	Awarded?
113655	3 WIRE PACIFIC COAST	MARSHA	800 531-1111	310-515-5564		

Create PO Create Contract New Row

Quotations for Vendor 113655 Filter 1 - 1 of 1

Line	Item	Description	Manufacturer	Quantity	Order Unit	Currency	Unit Cost	Base Currency	Base Unit Cost	Awarded?
1	0054201224	WHEEL SCREW FOR DOOR REPLACEMENT	PHILIPS	1.00	EA	USD	3,000.00		3,000.00	

Select RFQ Lines Award All

Click on the floppy disk icon to save. If you have additional Vendors, repeat steps by highlighting the vendor row and clicking on the **New Row** button in the **Quotations for Vendor** section.



6. SELECT THE PREFERRED VENDOR TO AWARD

In the **Quotations** tab, highlight the **Vendors** row you wish to award. Under the **Quotations for Vendor** section, check the **Awarded?** checkbox.

The screenshot shows the 'Quotations for Vendor' section in Maximo. The 'Awarded?' checkbox is checked for the selected vendor. A red arrow points to the 'Awarded?' checkbox.

Click on the floppy disk  icon to save.

7. PRINT THE BUYER CARD MATERIAL REQUISITION REPORT

Click on the **Section Action** dropdown list and select **Run Reports**.

The screenshot shows the 'Section Action' dropdown menu in Maximo. The 'Run Reports' option is selected. A red arrow points to the 'Run Reports' option.

A **Reports** window will appear. Click on the **Buyer Card Material Requisition** report.

The screenshot shows the 'Reports' window in Maximo. The 'Buyer Card Material Requisition' report is selected. A red arrow points to the 'Buyer Card Material Requisition' report.



Request Page window will appear. Fill in the RFQ # and basis of award fields. Click on the **Submit** button.

Request Page

Help Text

Parameters

Enter RFQ #: 7728

Requestor comments:

Enter basis of award (A=Competitive, D=Sole Source, E=Other): A

If "Sole/Single Source", explain:

If "Other Basis of Award", explain:

A **BIRT Report Viewer** window will appear. Click on the to print the report.

Reporting

Page 1 of 1

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

BUYER CARD MATERIAL REQUISITION

RFQ #: 7728 Date: 9/9/13 Budget FY: 2,014

Suggested Vendor:	
Vendor Code:	113655
Name:	3 WIRE PACIFIC COAST
Address:	23839 BANNING BLVD CARSON, CA 90745
Phone:	800-531-1111
FAX:	310-515-5564
Attention:	MARSHA

Ship To:	
Name:	M&O MAINTENANCE SOUTH 1
Address:	5620 11TH AVE. LOS ANGELES, CA 90043
Phone:	
FAX:	
Attention:	Lu, Denny

Requestor Info:	
Resp Area:	MOI
Org Name:	M&O MAINTENANCE SOUTH 1
Resp Org:	1431
Phone:	213-241-0573
FAX:	213-241-8948
Comments:	

Reply To:	
Name:	MOI - M&O MAINTENANCE SOUTH 1
Address:	5620 11TH AVE.
City/State/Zip:	LOS ANGELES, CA 90043

#	School Name	G/L Account
001	FREMONT SH	CC-0001855001-11731

Line #	Qty	Units	Item #	Acct Line	Description, Mfg, Model, Catalog Code, Notes	Craft	Unit Cost	Tax	Line Cost	Total Line Cost
1	1.00	EA	0054201224	001	WHEEL SCREW FOR DOOR REPLACEMENT, PHILIPS, A123		3,000.00	262.50	3,000.00	\$3,262.50
							Total Cost:			\$3,262.50

The Requestor is responsible for signing the Requestor line. Requestor to obtain the required signature in the **Approved By** field. The **Approved By** signature is determined by the Dollar amount of the requisition. **Approver** must verify that the vendor quote and Quotation lines match prior to approving the requisition.

CPM signs Requisitions for up to \$25,000, **AFSD** for \$25,001-\$50,000, **RFD** for \$50,001-\$100,000, and **Deputy Director** for over \$100,000.

Submit the signed **Buyer Card Material Requisition** report to **Buyer Card Holder** for processing.



8. CREATE PURCHASE ORDER

The Buyer Card holder will perform these functions.

Go to the **RFQ** record in the Request for Quotation application.

Request for Quotations
anny.lu on MaxCron01

Find: [] Select Action []

List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

RFQ: 7728 AA 14183033 Fremont SH, replace doors Status: SENT

Click on the **Quotations** tab, click on the  of vendor that is awarded and click on the **Create PO** button.

Request for Quotations
anny.lu on MaxCron01

Find: [] Select Action []

List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

RFQ: 7728 AA 14183033 Fremont SH, replace doors Site: LAUSD Status: SENT

Vendor: 113655 3 WIRE PACIFIC COAST

Vendor: 113655 3 WIRE PACIFIC COAST

Contract: MARSHA

SAP Vendor#: 1000004781

Phone: 800 531-1111

Fax: 310-515-5564

E-mail: []

Currency: USD

Ship Via: []

FOB Place: []

Payment Terms: []

Freight Terms: []

Pay Tax to Vendor? ☒

Vendor Quote #: []

Vendor Reply Date: []

Bid Taken By: []

Contract Details

Contractor License Number: []

Contractor Classification: []

Financial Rating(s) (Auto, Liability): []

Auto Ins. Exp. Date: []

Liability Ins. Exp. Date: []

Workers Comp Exp. Date: []

Insurance Verified By: []

Insurance Verified Date: []

Safety Prequal Date: []

Create PO New Row

A **Create PO** window will appear. Click on the **Autonumber** button and click **OK**. Please write down the auto-generated PO number as you will reference it in the next step.

Create PO

Create a PO by either entering a unique number in the PO field or by clicking Autonumber. Select OK when finished.

PO: 15399 AA 14183033 Fremont SH, replace doors

Autonumber OK

After you click **OK**, the RFQ status will be changed to **CLOSE**.

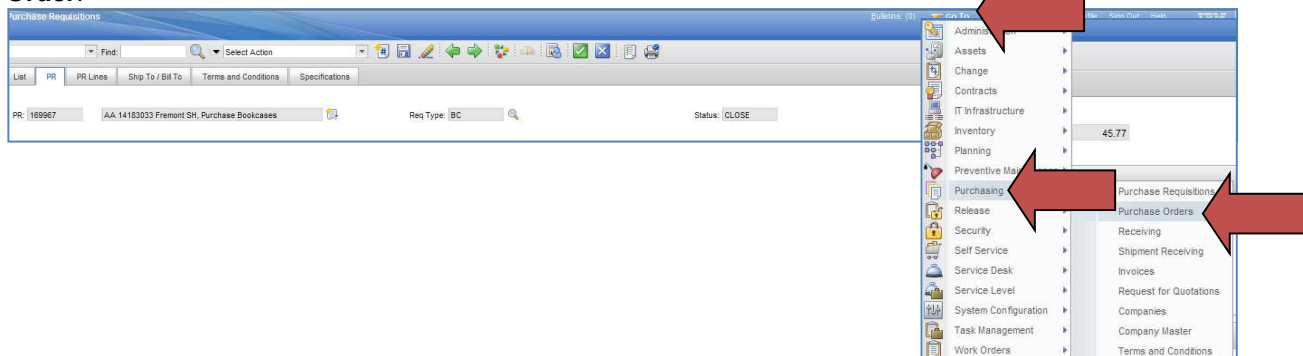
List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

RFQ: 7728 AA 14183033 Fremont SH, replace doors Site: LAUSD Status: CLOSE

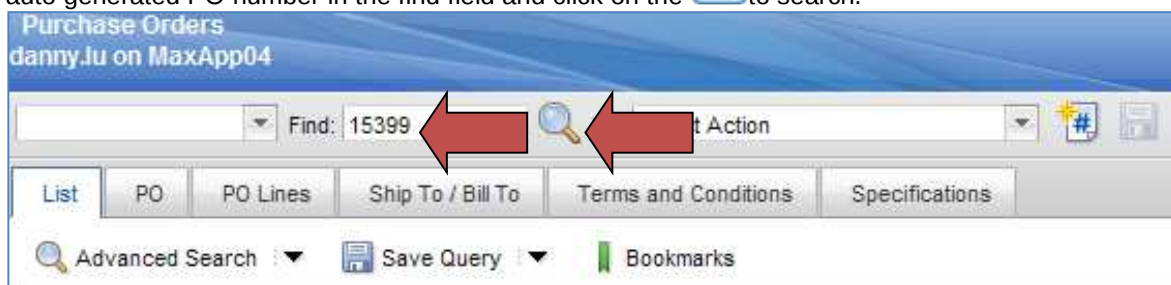


APPROVE PO

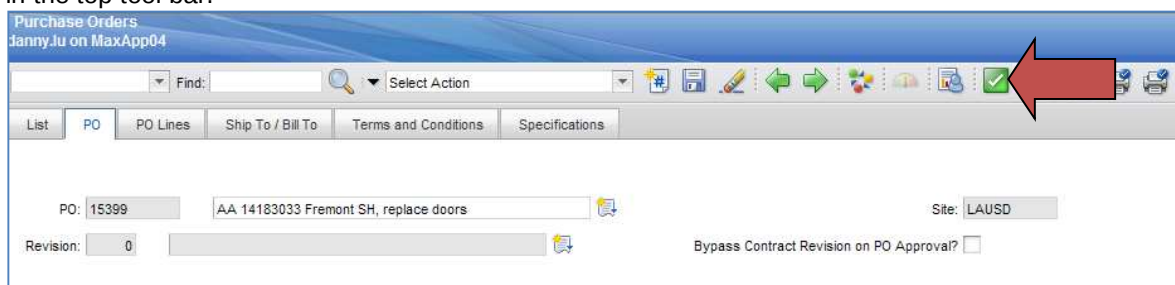
Click on the **Go To** button, hover your mouse over the **Procurement** module and select **Purchase Order**.



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



On the **Purchase Order** record, change the status to **APPR (Approve)**. Click on the  icon located in the top tool bar.





The **Change Status** window will appear with **Approved** selected as the **New Status**. Click on the **OK** button.

The screenshot shows the 'Change Status' window in Maximo. It contains fields for PO: 15399, AA 14183033 Fremont SH, replace doors, Revision: 0, Status: WAPPR, and Waiting on Approval (WAPPR). Below these are two memo fields. The 'New Status' dropdown is set to 'Approved (AP)' and the 'Status Date' is '9/9/13 4:10 PM'. A red arrow points to the 'Approved (AP)' dropdown, and another red arrow points to the 'OK' button at the bottom right.

9. PRINT PURCHASE ORDER DETAILS REPORT AND PLACE ORDER WITH VENDOR

The Buyer Card holder performs this function.

On the Purchase Order record, click on the  icon to run/print the **Purchase Order Details** report.

The screenshot shows the 'Purchase Orders' record in Maximo. It includes a toolbar with various icons, including a print icon. A red arrow points to the print icon. Below the toolbar are tabs for List, PO, PO Lines, Ship To / Bill To, Terms and Conditions, and Specifications. The main area displays PO: 15399, AA 14183033 Fremont SH, replace doors, Site: LAUSD, Revision: 0, and a checkbox for 'Bypass Contract Revision on PO Approval?'.

A new **BIRT Report Viewer** window will appear with the report. Click on the  icon to print the report.

The screenshot shows the 'Reporting' window in Maximo. It displays the 'Purchase Order' report. The header includes the Los Angeles Unified School District logo, the text 'Existing Facilities Maintenance & Operations', and the M&O logo. The report content shows PO NO.: 15399, PO Revision No.: 0, RFQ #: 7728, and PO Type (from PR or RFQ): BC. A red arrow points to the print icon in the toolbar.

Buyer Card Holder signs the **PO Details** report. Attach the signed **PR Report** with the **PO Report** and submit to **Requestor** for confirmation and filing.



Buyer Card Holder to submit a copy of the **PO Details** report or provide the **PO Number** to Vendor to initiate purchase.

10. OPTIONAL: MODIFY PURCHASE ORDER

The Requestor performs this function

To modify a Buyer Card Purchase Order, On the PO record, click on **the Select Action** dropdown and select **Revise PO**.

Purchase Orders
danny.ju on MaxCron01

Find: [] Select Action []

List PO PO Lines Ship To / Bill To Terms

PO: 6838 AA 14183033 Fremont SH, t

Revision: 0

Site: LAUSD

Bypass Contract Revision on PO Approval? []

Select Action dropdown options:
Change Status
View History
Copy PR Line Items To PO
Create Contract
Complete Receipts
Revise PO
View Revision History

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

Revise PO

PO: 6838 * Modify line one cost.

Revision: 1

Internal Change? []

Allow Receipts and Invoices? [x]

OK

After you click **OK**, you will be taken to your revised **PO record**. Noticed that the Revision number is now 1 and the status is **PNDREV (Pending Revision)**.

Purchase Orders
danny.ju on MaxCron01

Find: [] Select Action []

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

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases

Revision: 1

Site: LAUSD

Status: PNDREV

Bypass Contract Revision on PO Approval? []



Click on the **PO Lines** tab to make your modifications. Click on the floppy disk icon to save.

The screenshot shows the Maximo interface for a Purchase Order. The 'PO Lines' tab is selected. A red arrow points to the 'PO Lines' tab, and another red arrow points to the floppy disk icon in the toolbar. The PO number is 6838, and the description is 'AA 14183033 Fremont SH, Purchase Bookcases'. The site is LAUSD. The status is PNDREV. The PO Lines table shows one line item: 1, 3207400000, Screws, Wood 1/2", with a quantity of 3.00 and a unit cost of 25.00.

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

The screenshot shows the Maximo interface for a Purchase Order. The 'PO Lines' tab is selected. A red arrow points to the print icon in the toolbar. The PO number is 6838, and the description is 'AA 14183033 Fremont SH, Purchase Bookcases'. The site is LAUSD. The status is PNDREV. The PO Lines table shows one line item: 1, 3207400000, Screws, Wood 1/2", with a quantity of 3.00 and a unit cost of 25.00.

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.

The screenshot shows the BIRT Report Viewer window. The report title is 'Modified Purchase Order'. The report content includes the following information: PO NO.: 6838, PO Revision No.: 1, PO Date: 9/6/13, Requested Delivery Date: , Vendor: 107679-A, Payment Terms: , Freight Terms: , PO Type (from PR or RFQ): . The report is displayed on page 1 of 1. A red arrow points to the printer icon in the toolbar.

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

CPM signs Requisitions for up to \$25,000, **AFSD** for \$25,001-\$50,000, **RFD** for \$50,001-\$100,000, and **Deputy Director** for over \$100,000.

Submit the signed **Modified PO** report to **Buyer Card Holder** for processing.



The Buyer Card holder performs this function.

Go to the **Revised PO** record in the Purchase Order application and change the status to **APPR** (Approve).

Note: Make sure you are on the **Revision 1** PO. If you are not, click on the **List** tab and select the revision 1 PO.

Purchase Orders
JannyJu on MaxCron00

Find: [] Select Action []

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

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases Site: LAUSD Status: PNDREV

Revision: 1 Bypass Contract Revision on PO Approval? []

Details

Type: STD
Buyer Company: []
Buyer: []
Priority: 0
Receipts: NONE
Contract #: []

Dates

Change Status

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases

Revision: 1 Modify line one cost. []

Status: PNDREV Pending Revision

Memo: []

New Status: Approved (APR) []

Status Date: 9/9/13 9:54 AM []

Memo: []

OK

Contact vendor and place the order per the **Modified Purchase Order**. Submit **Modified Purchase Order** report back to the requestor for filing/holding until Invoice.

12. ORDER/INVOICE RECEIVED, REQUESTOR TO RECEIVE LINE ITEM IN RECEIVING APPLICATION AND SUBMIT RECEIPT/PACKING LIST AND INVOICE TO BUYER CARD HOLDER

The Requestor performs this function

After receiving the item(s) and Invoice from the vendor, Requestor to receive item in Maximo. In the **Start Center** of Maximo, under **Favorite Applications**, click on the **Receiving** application.

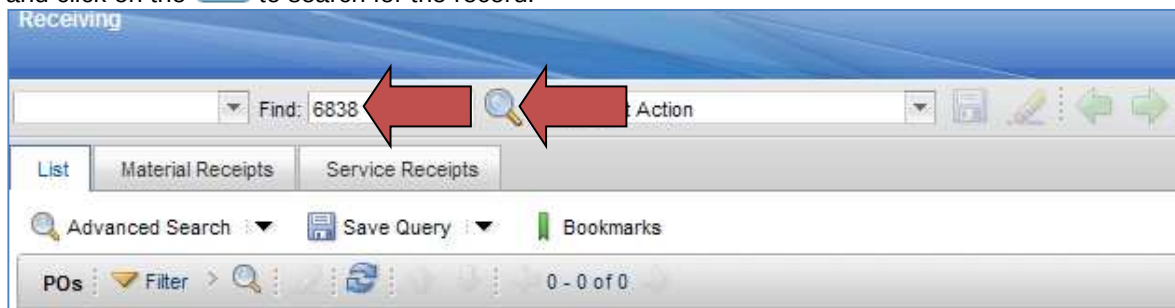
Welcome, Lu, Danny

Favorite Applications

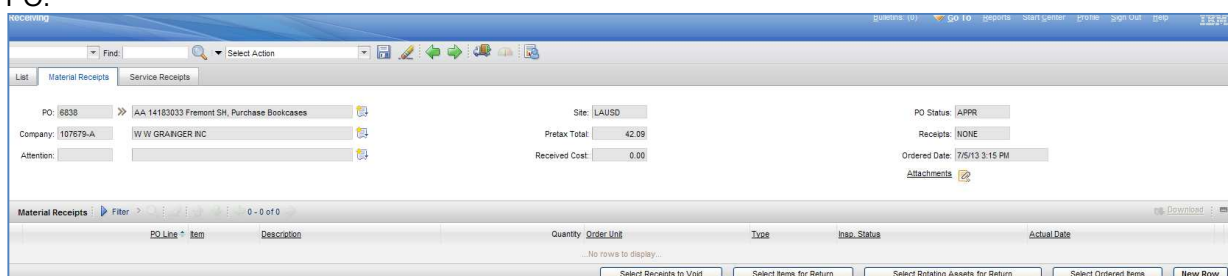
- Work Order Tracking
- Labor Reporting
- View Requisition
- Purchase Requisitions
- Request for Quotations
- Purchase Orders
- Receiving
- Preventive Maintenance



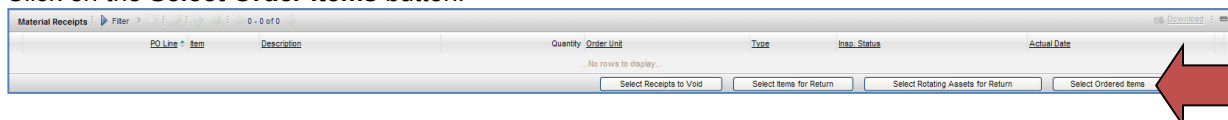
In the **Receiving** application, enter **PO number** found on the **Purchase Order report** in the **Find** field and click on the  to search for the record.



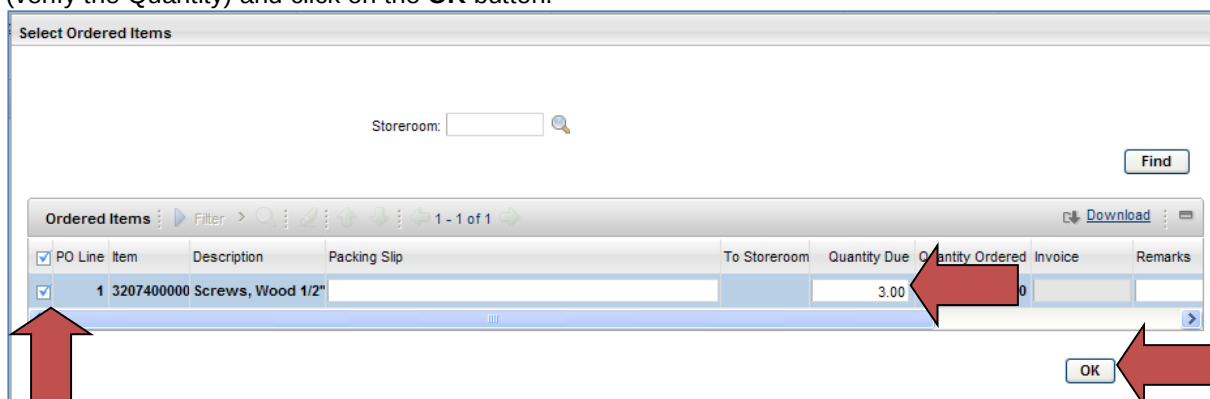
You will then be taken to the **Materials Receipt** tab of the record. **Note:** Make sure you are on the correct PO (if there are revisions). If you are not, click on the **List** tab and select the correct revised PO.



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



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





Maximo 7.5 / Buyer Card Guide

You will be taken back to the previous screen. Click on the floppy disk icon to save the record. The Receipts status will be changed to **COMPLETE** if all items were received.

The screenshot shows the Maximo 7.5 Buyer Card interface. At the top, a message bar indicates 'BMXAA4268 - Record has been saved.' Below this, the 'Material Receipts' section is visible. A red arrow points to the floppy disk icon in the top bar, which is used to save the record. Another red arrow points to the 'COMPLETE' status in the 'Receipts' field, indicating that the status has been updated. The interface also shows fields for PO Number (6838), Company (W W GRANGER INC), Site (LAUSD), and a table of receipt items with columns for PO Line, Item, Description, Quantity, Order Unit, Type, Insp. Status, and Actual Date.

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

Inspected By	The act of examining goods that have been delivered to determine conformance to what was ordered via the purchase order. • Verify that what was ordered conforms to purchase document (purchase order, statement of work, specifications, attachments, etc...) • Verify the quantity ordered against the quantity shipped or delivered. • Inspect for damage or breakage. • Verify that the unit of measurement count is correct. - o Example 1: If the unit of measurement on the purchase order is 200 square feet of playground matting, measure actual installed matting square footage. - o Example 2: If the unit of measurement on the purchase order is one dozen, count 12 in the unit package. • Verify that delivery documentation (packing slip, certifications, etc.) is acceptable. • Verify that packaging integrity is preserved (no leakage, damages, etc.). • If needed, take photo of goods/services for confirmation of inspection.
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.

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

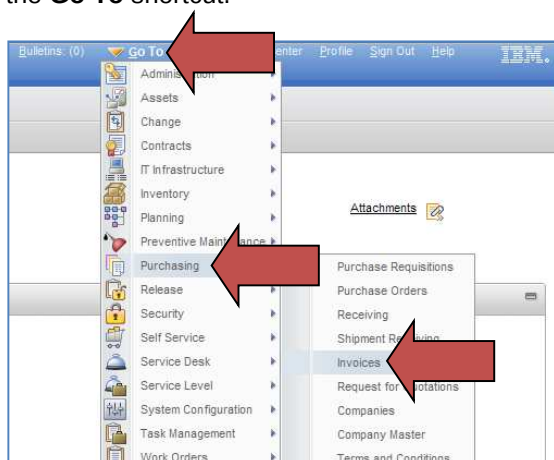
Submit the **PO report**, **Purchase receipt(s)**, **Packing Slip** and **Vendor Invoice** to **Buyer Card Holder** to complete the invoice record and reconcile the purchase in SAP.

13. CREATE MAXIMO INVOICE RECORD, CHANGE MAXIMO INVOICE STATUS TO PAID

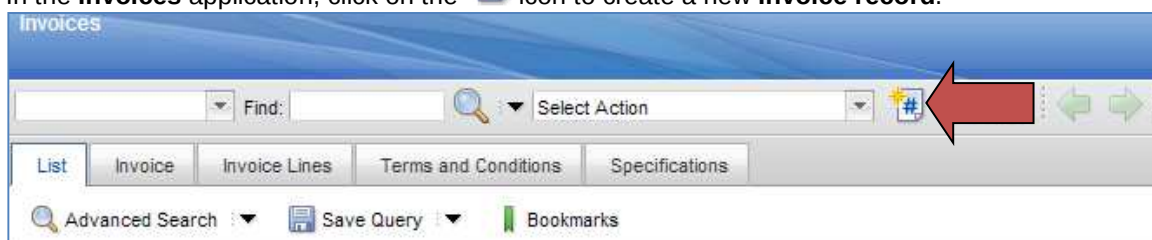
The Buyer Card holder performs this function.



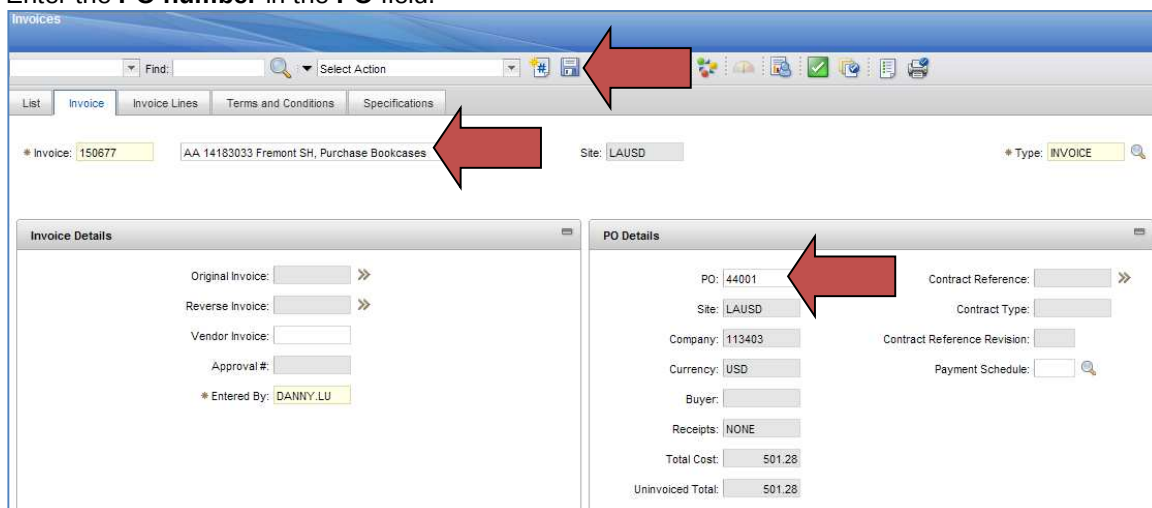
Go to the **Invoice** application by either through the **Start Center Favorite Applications** list or utilizing the **Go To** shortcut.



In the **Invoices** application, click on the  icon to create a new **Invoice** record.



A new Invoice number will auto-populate. Type in the same **PO description** in the description box. Enter the **PO number** in the **PO** field.



Click on the floppy disk  icon to save.



Click on the **Invoice Lines** tab and click on the **Copy PO Lines** button.

Find: 150677 Select Action

Invoice: 150678 AA 14183033 Fremont SH, Purchase Bookcases

Pretax Total: 0.00 Type: INVOICE
Line Total: 0.00 Status: ENTERED
Invoice Total: 0.00 Site: LAUSD

Invoice Lines Filter 0 - 0 of 0

Line	Item	Description	PO	PO Site	Quantity	Unit Cost	Tax
...No rows to display...							

Copy PO Lines

The **Copy PO Lines** window appears. Check the lines that match the Invoice and click **OK**.

Copy PO Lines

☒ View all lines
☐ View all lines that are not invoiced

PO Lines Materials Services

PO Lines Filter 1 - 4 of 4 Download

PO	Line	Item	Description	Quantity	Uninvoiced Quantity	Line Cost	Uninvoiced Cost	Site
☒	44001	1	9628600000 Shipping and Handling	5.00	5.00	100.00	100.00	LAUSD
☒	44001	2	3600500000 Wood Adhesive	2.00	2.00	259.90	259.90	LAUSD
☒	44001	3	3651000000 Floor Brush	1.00	1.00	32.76	32.76	LAUSD
☒	44001	4	4453000000 Staple Gun	1.00	1.00	65.00	65.00	LAUSD

OK

The **PO Lines** will be brought back over to the **Invoice Line** tab.

Find: 150677 Select Action

Invoice: 150678 AA 14183033 Fremont SH, Purchase Bookcases

Pretax Total: 457.86 Type: INVOICE
Line Total: 457.86 Status: ENTERED
Invoice Total: 501.26 Site: LAUSD

Invoice Lines Filter 1 - 4 of 4 Download

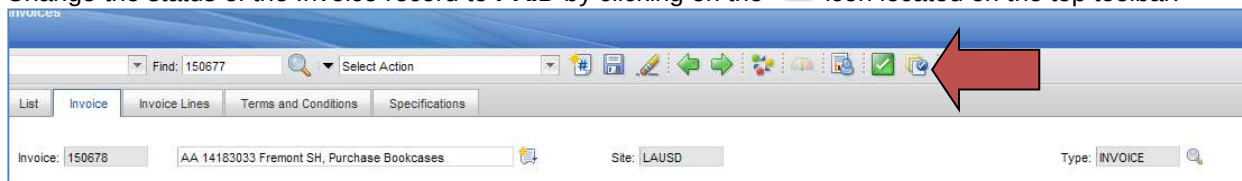
Line	Item	Description	PO	PO Site	Quantity	Unit Cost	Tax	Line Cost
1	9628600000	Shipping and Handling	44001	LAUSD	5.00	20.00	8.75	100.00
2	3600500000	Wood Adhesive	44001	LAUSD	2.00	129.95	25.34	259.90
3	3651000000	Floor Brush	44001	LAUSD	1.00	32.76	3.19	32.76
4	4453000000	Staple Gun	44001	LAUSD	1.00	65.00	6.34	65.00

Copy PO Lines Select Consignment Transactions Distribute Costs New Row

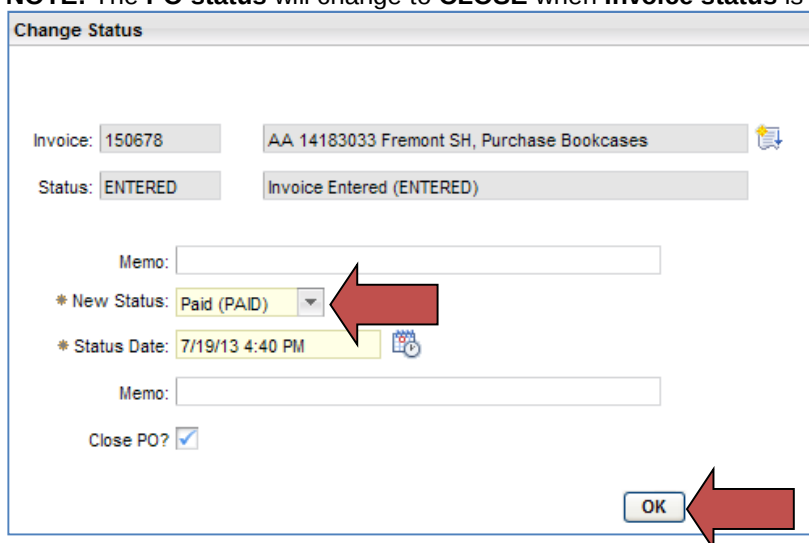
Click on the floppy disk icon to save the record.



Change the status of the Invoice record to **PAID** by clicking on the  icon located on the top toolbar.

The screenshot shows the Maximo 'Invoices' application window. The top toolbar contains various icons for actions like 'Find', 'Select Action', 'Print', 'Refresh', 'Cancel', 'Save', 'Delete', 'Change Status', 'Check', 'Uncheck', 'Print', 'Export', 'Import', 'Help', and 'Log Off'. A red arrow points to the 'Change Status' icon, which is a document with a checkmark and a downward arrow. Below the toolbar, the 'Invoice' tab is selected, showing details for invoice 150678, including the description 'AA 14183033 Fremont SH, Purchase Bookcases', the site 'LAUSD', and the type 'INVOICE'.

The **Change Status** window will appear with **Paid (PAID)** as the selected status. Click **OK**.
NOTE: The **PO status** will change to **CLOSE** when **Invoice status** is changed to **PAID**.

The screenshot shows the 'Change Status' dialog box. It contains fields for 'Invoice' (150678) and 'Description' (AA 14183033 Fremont SH, Purchase Bookcases). The 'Status' is currently 'ENTERED'. Below these fields are two 'Memo' text boxes. The '* New Status' dropdown menu is set to 'Paid (PAID)', with a red arrow pointing to it. The '* Status Date' is '7/19/13 4:40 PM'. At the bottom, there is a 'Close PO?' checkbox which is checked, and an 'OK' button with a red arrow pointing to it.

14. RECONCILE PURCHASE IN SAP

The Buyer Card holder performs this function.

Reconcile the purchase in SAP. SAP reconciliation instructions can be downloaded from <http://www.laschools.org/new-site/mo/awms> under Procurement, titled, "**Buyer Card Reconcile Process (SAP).**"

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).