



Los Angeles Unified School District
Maximo 7.5 / Work Order
Wall Fold Table Work Order Guide



DEFINITION

The Wall Fold Table Work Order guide provides step by step instructions on how to update the planning estimates and fund the work order.

Note: Although the Wall Fold Tables/Benches Replacement work orders were pre-generated for you with planning estimates, you must update each of the planned labor lines to obtain the correct burden rates. Instructions will be provided in this guide.

1. LOGIN

The Project Unit Carpentry Senior or Designee will perform this function.

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

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

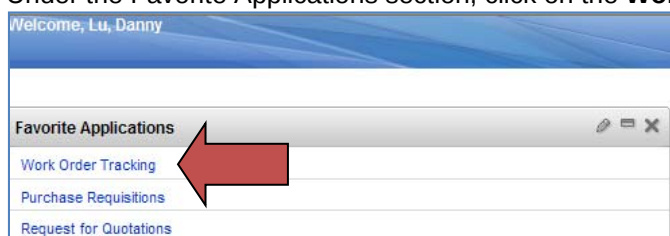
START CENTER

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



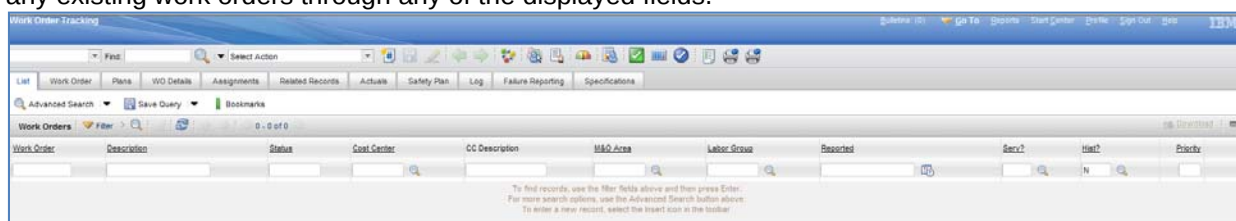
WORK ORDER TRACKING

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



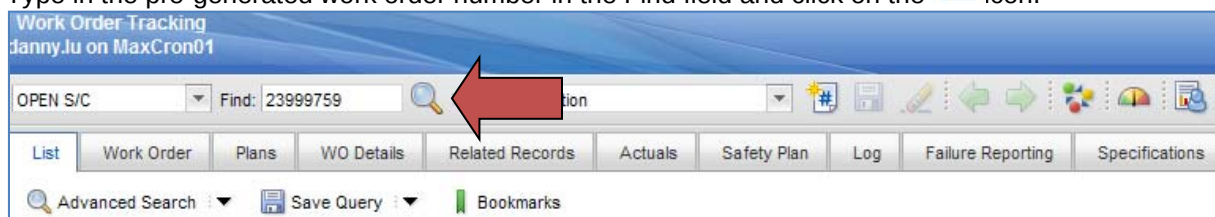
WORK ORDER TRACKING HOME

You will then be taken to the Work Order Tracking home screen; in this screen, you may search for any existing work orders through any of the displayed fields.

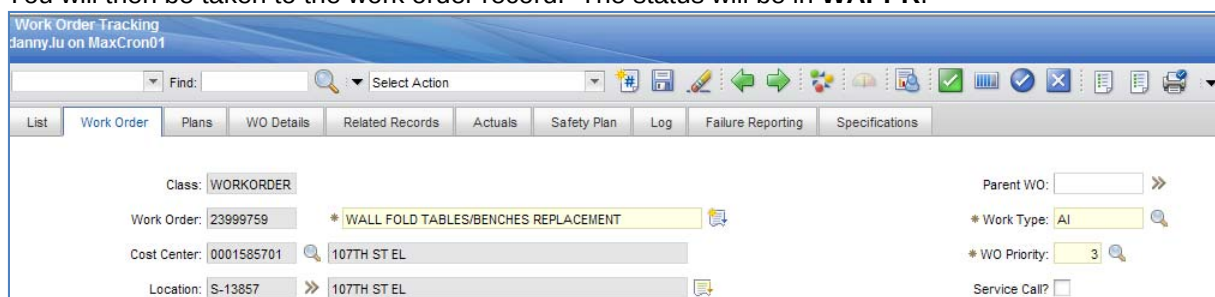


2. SEARCH FOR WORK ORDER AND CHANGE STATUS TO IN PLANNING (INPLAN)

Type in the pre-generated work order number in the Find field and click on the  icon.



You will then be taken to the work order record. The status will be in **WAPPR**.





Change the status to **INPLAN**. Click on the  icon, a Change Status window appear. Select **In Planning (INPLAN)** status and click on the **OK** button.

Work Order Tracking
danny.lu on MaxCron01

Find: [] Select Action []

Class: WORKORDER

Work Order: 23999759 * WALL FOLD TABLES/BENCHES REPLACEMENT

Cost Center: 0001585701 107TH ST EL

Location: S-13857 107TH ST EL

Location Path: 107TH ST EL

Asset: []

Job Type: 99 Planned Job - Projects Unit or M&O Area Non-RRGM fu

CPM: 211563 Horton, Willie

Section: 1433

GL Account: []

Requestor: []

Req. Title: []

Change Status on Child WO's? ☒

Is Task? ☐

Parent WO: []

Work Type: AI

WO Priority: 3

Service Call? ☐

Change Status

Work Order: 23999759 WALL FOLD TABLES/BENCHES REPLACEMENT

Status: WAPPR Waiting on Approval (WAPPR)

New Status: In Planning (INF) 

Status Date: 9/19/13 3:11 PM

Memo: []

Print Work Order(s)? ☐

Change work order status in back ground? ☐

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

OK

3. UPDATE/REFRESH PLANNED LABOR ESTIMATES

Click on the **Plans** tab to update the planned labor and material estimates.

Work Order Tracking
danny.lu on MaxCron01

Find: [] Select Action []

Class: WORKORDER

Work Order: 23999759 * WALL FOLD TABLES/BENCHES REPLACEMENT

Cost Center: 0001585701 107TH ST EL

Location: S-13857 107TH ST EL

Parent WO: []

Work Type: AI

WO Priority: 3

Service Call? ☐

Plans

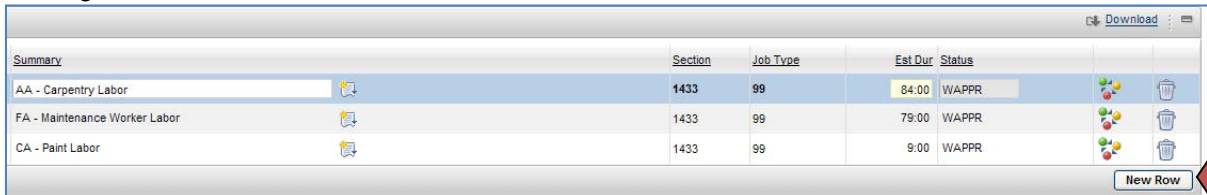
In the **Plans** tab, you will notice that the work order will already have three tasks (**AA, FA, CA**) and three labor estimates (**AA – 84hrs, FA – 79hrs, CA – 9hrs**).

Tasks for Work Order 23999759							
Sequence	Task #	Mat Cat	Craft	Summary	Section	Job Type	
10	10			AA - Carpentry Labor	1433	99	
20	20			FA - Maintenance Worker Labor	1433	99	
30	30			CA - Paint Labor	1433	99	

Labor							
Task	Craft	Craft Description	Labor Category	Quantity	Hours		
10	AA	Carpenter	LR	1	84.00		
20	FA	Maintenance	LR	1	79.00		
30	CA	Painter	LR	1	9.00		



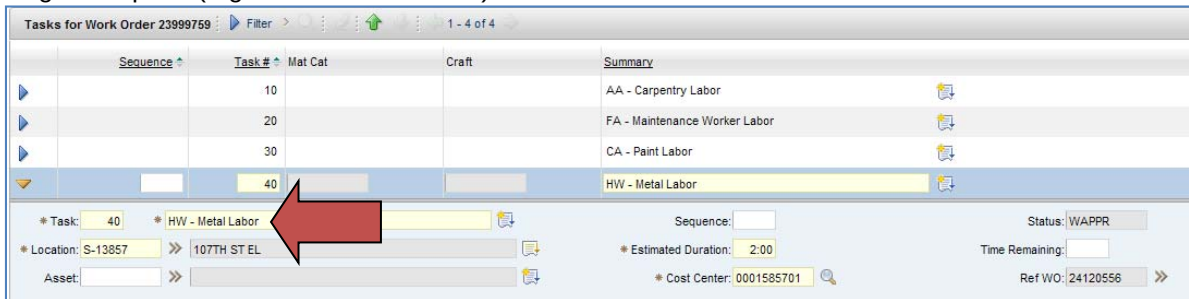
OPTIONAL: If there are additional crafts that are missing, please create a new task line for the missing craft. To create a new tasks line, click on the **New Row** button.



Summary	Section	Job Type	Est Dur	Status
AA - Carpentry Labor	1433	99	84:00	WAPPR
FA - Maintenance Worker Labor	1433	99	79:00	WAPPR
CA - Paint Labor	1433	99	9:00	WAPPR

New Row

A new row will appear with the next incremental task number (e.g. 40). Type in the Craft code in the long description (e.g. **HW – Metal Labor**).



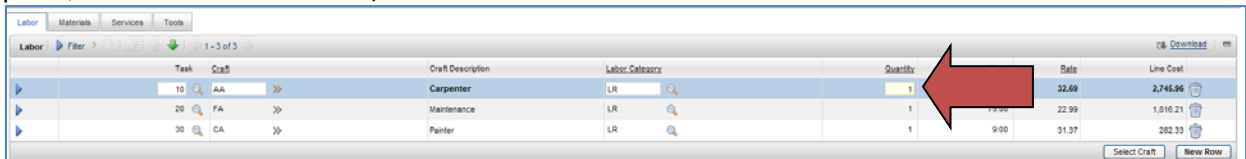
Sequence	Task #	Mat Cat	Craft	Summary
10				AA - Carpentry Labor
20				FA - Maintenance Worker Labor
30				CA - Paint Labor
40				HW - Metal Labor

* Task: 40 * HW - Metal Labor
* Location: S-13857 >> 107TH ST EL
Asset: >>
Sequence:
Status: WAPPR
* Estimated Duration: 2:00
Time Remaining:
* Cost Center: 0001585701
Ref WO: 24120556 >>

Click on the  icon to save the record.

NOTE: The work orders were pre-planned with **84hrs for AA, 79hrs for FA and 9hrs for CA**. Even if this is correct, you will need to **refresh** the values to update the burden rates. When the work orders were pre-generated, the burden rates were not updated.

To **refresh** the values, simply remove and replace any of the values for each of the Planned Labor row. For example, you may remove the quantity of **1**, tab out, and re-enter the quantity of **1**. This will refresh the line. You must do this for each of the lines. To verify that the refresh has taken place, the Rate for **AA is 56.86, FA is 39.99 and CA is 54.57**.

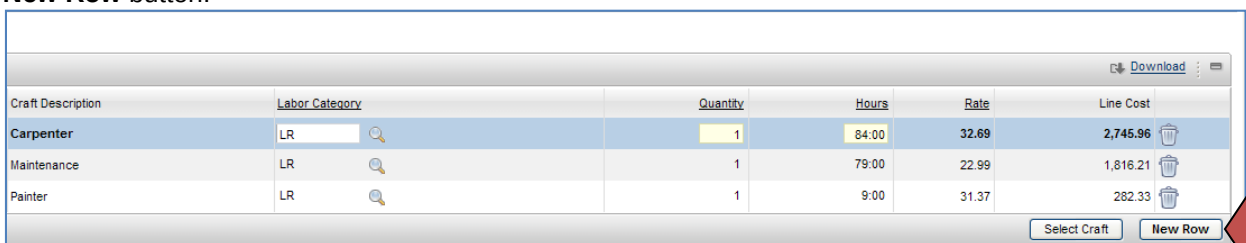


Task	Craft	Craft Description	Labor Category	Quantity	Rate	Line Cost
10	AA	Carpenter	LR	1	32.69	2,745.96
20	FA	Maintenance	LR	1	22.99	1,816.21
30	CA	Painter	LR	1	31.37	282.33

Select Craft New Row

Click on the  icon to save the record.

OPTIONAL: If there are labor estimates missing, you may create a new labor line clicking on the **New Row** button.



Craft Description	Labor Category	Quantity	Hours	Rate	Line Cost
Carpenter	LR	1	84:00	32.69	2,745.96
Maintenance	LR	1	79:00	22.99	1,816.21
Painter	LR	1	9:00	31.37	282.33

Select Craft New Row



A new row will appear, type in the appropriate **Task number, Craft code and Hours**.

Task	Craft	Craft Description	Labor Category
10	AA	Carpenter	LR
20	FA	Maintenance	LR
30	CA	Painter	LR
40	HW	WELDER	LR

Task: 40
Craft: HW
Labor Category: LR
Hours: 2:00
Quantity: 1
Burdened Rate: 70.01

Click on the  icon to save the record. Repeat steps for additional planned labor estimates.

4. CREATE MATERIAL ESTIMATES

The pre-generated work orders do not include material estimates. Per the cost breakdown from Leo Munoz's spreadsheet, each project includes a **Trash Bin & Expendables and Material** estimate. You will need to create a material line for each of these items.

To create Material estimates, click on the Materials tab.

Materials

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

Task	Mat Cat	Line Type	Craft	Item	Description	Quantity	Avg Cost	Line Cost	Storeroom	Direct Issue?
10	MA	MATERIAL	AA		Trash Bin & Expendables					

New Row

Material #1: Trash Bin & Expendables

Task = 10	Craft = AA
Material Category = MA	Order Unit = EA
Line Type = Material	Avg Cost = 500
Description = Trash Bin & Expendables	

Task	Mat Cat	Line Type	Craft	Item	Description	Quantity	Avg Cost	Line Cost	Storeroom	Direct Issue?
10	MA	MATERIAL	AA		Trash Bin & Expendables	1.00	500.00	596.50		

Task: 10
Material Category: MA
Line Type: Material
Item: Trash Bin & Expendables
Quantity: 1.00
Storeroom:
Craft: AA
Direct Issue?: ☒
Order Unit: EA
Indirect Rate: 1.193
Burden Unit Cost: 596.50
Burden Line Cost: 596.50
Avg Cost: 500.00

**Material #2: Construction Material**

Task = 10	Craft = AA
Material Category = MA	Order Unit = EA
Line Type = Material	Avg Cost = 12295.20 (This value varies from project to project; confirm from spreadsheet)
Description = Construction Material	

Materials: Filter > 1 - 2 of 2

Task	Mat Cat	Line Type	Craft	Item	Description
10	MA	MATERIAL	AA		Trash Bin & Expendables
10	MA	MATERIAL	AA		Construction Material

Task: 10
* Material Category: MA
* Line Type: Material
Item: Construction Material
* Quantity: 1.00
Storeroom: >>
* Craft: AA

Direct Issue? ☒
Order Unit: EA
Indirect Rate: 1.193
Burden Unit Cost: 14,668.17
Burden Line Cost: 14,668.17
* Avg Cost: 12,295.20

Click on the  icon to save the record.

5. CHANGE STATUS TO WREVIEW AND PRINT PLANNER DATA ENTRY REPORT

Change the status to **WREVIEW**. Click on the  icon, a Change Status window appear. Select **Waiting on Review (WREVIEW)** status and click on the **OK** button.

Work Order Tracking
lanny.lu on MaxCron01

Find: Select Action

Work Order: 23999759 * WALL FOLD TABLES/BENCHES REPLACEMENT

Parent WO: Section: 1433
Status: INPLAN Job Type: 99

Children of Work Order 23999759: Filter > 0 - 0 of 0

Sequence * WONUM Description Location Location Description

Tasks for Work Order 23999759: Filter > 1 - 3 of 3

Sequence	Task #	Mat Cat	Craft
	10	MA	AA
	20		
	30		

Change Status

Work Order: 23999759 WALL FOLD TABLES/BENCHES REPLACEMENT

Status: INPLAN In Planning (INPLAN)

* New Status: Waiting on Rev

* Status Date: 9/19/13 4:27 PM

Memo:

Print Work Order(s)? ☐

Change work order status in back ground? ☐

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

OK



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

Work Order Tracking
janny.ju on MaxCron01

Find: [Search Icon] Select Action [Dropdown Icon]

Log Failure Reporting Specifications

Work Order: 23999759 * WALL FOLD TABLE

Parent WO: [Search Icon]
Status: WREVIEW

Children of Work Order 23999759: [Filter] >

Sequence WON

Tasks for Work Order 23999759: [Filter] >

Sequence Task # Mat Cat

10	MA	
20		
30		

Labor Materials Services Tools

Materials: [Filter] > [Download Icon] 1

Task	Mat Cat	Line
10	MA	MA
10	MA	MA

Summary

Description
AA - Carpentry Labor
FA - Maintenance Worker Labor
CA - Paint Labor

Run Reports

Trash Bin & Expendables

Construction Material

A **Reports** window will appear. Select the **Planner Data Entry** report.

Reports

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

On Demand Reports [Filter] > [Download Icon] 11 - 15 of 22 [Download Icon]

Description

Description
Overtime Request
Planner_Data_Entry
Project_Cost_Estimate
Stock Material Requisition
Time Card Report

Create Report Cancel



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

The Request Page form contains the following sections:

- Help Text**: A small icon in the top right corner.
- Parameters**: A field labeled "Print modified (02 Change Worksheet) (Y or N):" with a text input containing "N".
- Schedule**: Three radio button options: "Immediate" (selected), "At this Time" (with a date/time picker icon), and "Recurring" (with a calendar icon).
- Email**: Fields for "To:", "Subject:", and "Comments:". Below these are two groups of radio buttons: "File Type" with "PDF" (selected) and "XLS", and "Report Delivery Format" with "Email with a file attachment" (selected) and "Email with a file URL".
- Submit**: A button at the bottom right, highlighted by a large red arrow.

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

The BIRT Report Viewer window displays the following information:

- Reporting**: A header bar with a "Page 1 of 1" indicator and navigation icons. A red arrow points to the print icon.
- Los Angeles Unified School District**: The district name is centered.
- Existing Facilities Maintenance & Operations**: The department name is on the right, next to the M&O logo.
- Planner - Data Entry Form**: The report title is on the left.
- WO# 23999759**: The work order number is on the right.

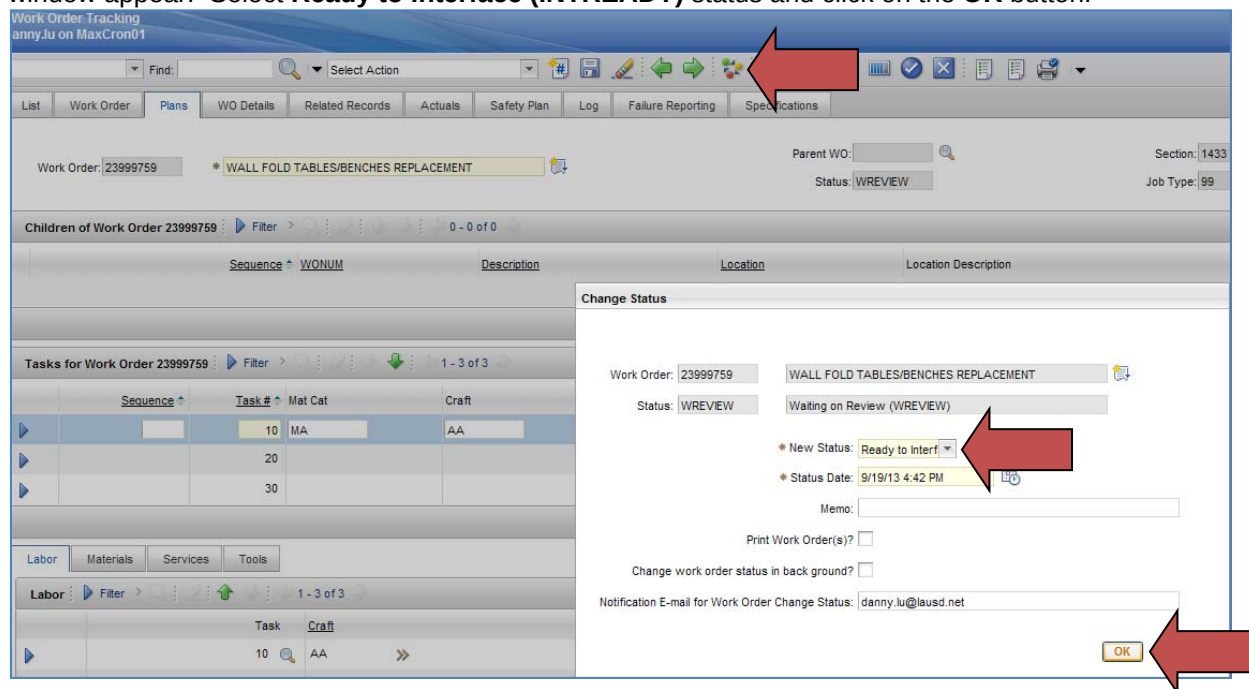
Obtain the **Supervisor** and **Approved By** signature on the report.



6. SUBMIT PDE TO CLERICAL AND CHANGE STATUS TO INTREADY TO FUND WORK ORDER

The clerical department will perform this function.

Go to the work order and change the status to **INTREADY**. Click on the  icon, a Change Status window appear. Select **Ready to Interface (INTREADY)** status and click on the **OK** button.



Work Order Tracking
anny.lu on MaxCron01

Find: [] Select Action []

Work Order: 23999759 * WALL FOLD TABLES/BENCHES REPLACEMENT

Parent WO: [] Section: 1433
Status: WREVIEW Job Type: 99

Children of Work Order 23999759: 0 - 0 of 0

Sequence: WONUM Description Location Location Description

Tasks for Work Order 23999759: 1 - 3 of 3

Sequence	Task #	Mat Cat	Craft
	10	MA	AA
	20		
	30		

Labor Materials Services Tools

Labor: 1 - 3 of 3

Task Craft

10 AA

Change Status

Work Order: 23999759 WALL FOLD TABLES/BENCHES REPLACEMENT

Status: WREVIEW Waiting on Review (WREVIEW)

* New Status: Ready to Interf

* Status Date: 9/19/13 4:42 PM

Memo: []

Print Work Order(s)? ☐

Change work order status in back ground? ☐

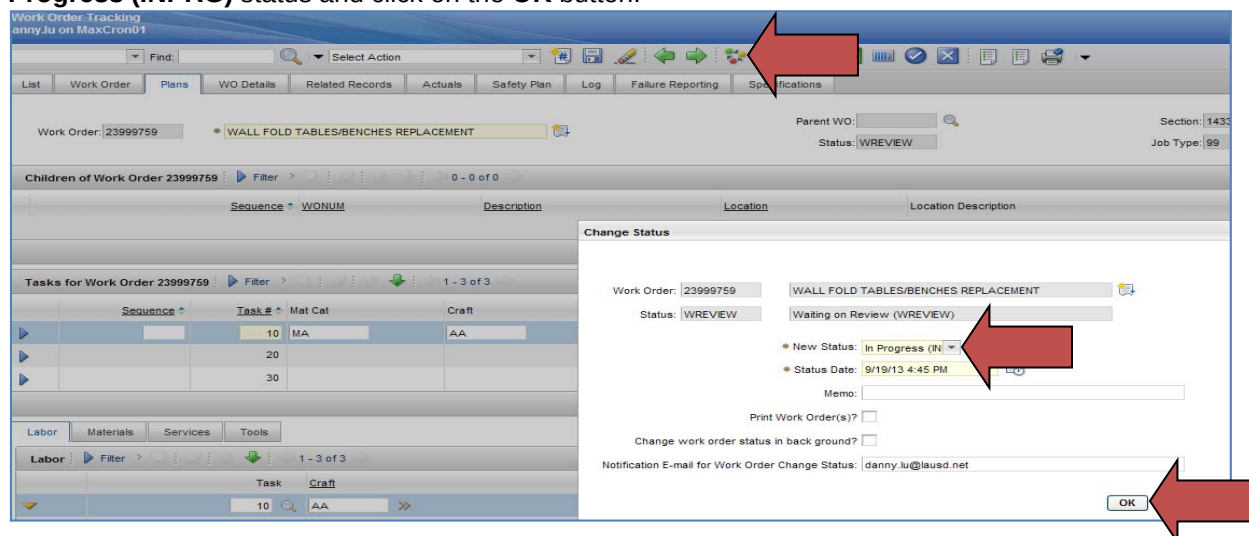
Notification E-mail for Work Order Change Status: danny.lu@lausd.net

OK

Maximo will interface the planned estimates into SAP to generate an Internal Order (I/O) number. The individual who changes the status to INTREADY will receive an email indicating if the interface was successful or failed. If successful, the status of the work order will automatically be changed to **FUNDED**.

7. CHANGE STATUS TO INPRG WHEN WORK COMMENCES

Change the status to **INPRG**. Click on the  icon, a Change Status window appear. Select **In Progress (INPRG)** status and click on the **OK** button.



Work Order Tracking
anny.lu on MaxCron01

Find: [] Select Action []

Work Order: 23999759 * WALL FOLD TABLES/BENCHES REPLACEMENT

Parent WO: [] Section: 1433
Status: WREVIEW Job Type: 99

Children of Work Order 23999759: 0 - 0 of 0

Sequence: WONUM Description Location Location Description

Tasks for Work Order 23999759: 1 - 3 of 3

Sequence	Task #	Mat Cat	Craft
	10	MA	AA
	20		
	30		

Labor Materials Services Tools

Labor: 1 - 3 of 3

Task Craft

10 AA

Change Status

Work Order: 23999759 WALL FOLD TABLES/BENCHES REPLACEMENT

Status: WREVIEW Waiting on Review (WREVIEW)

* New Status: In Progress (INPRG)

* Status Date: 9/19/13 4:45 PM

Memo: []

Print Work Order(s)? ☐

Change work order status in back ground? ☐

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

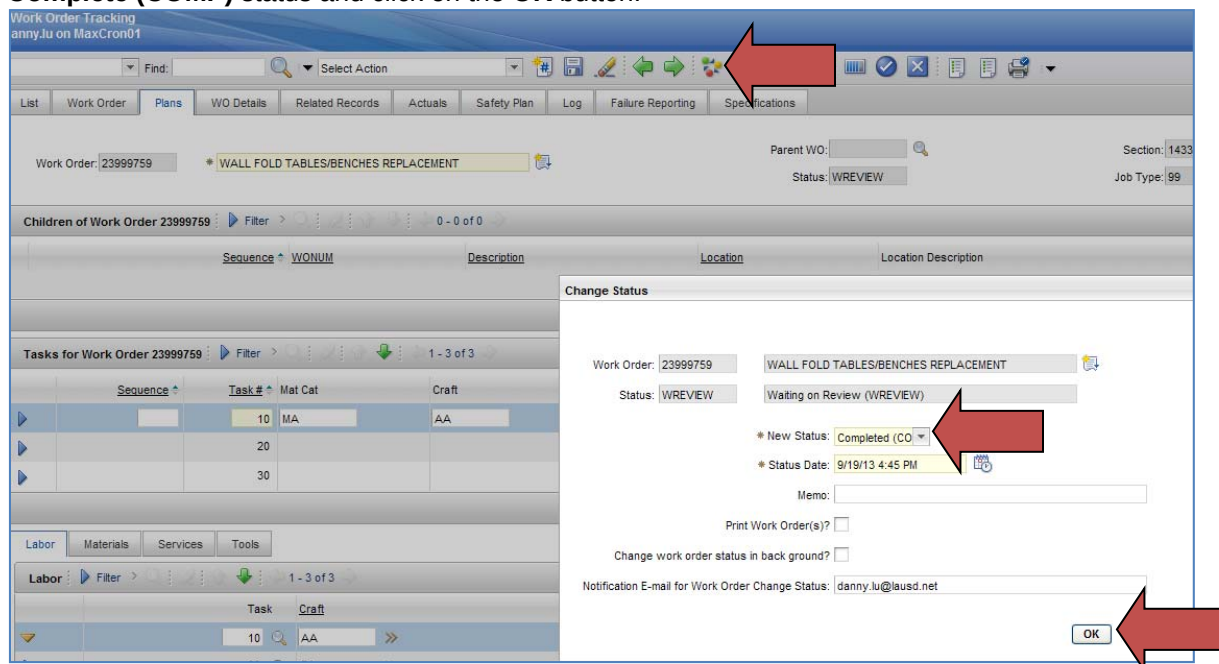
OK



8. CHANGE STATUS TO COMP WHEN WORK IS COMPLETE

The Project Unit Carpentry Senior or Designee will perform this function.

Change the status to **COMP**. Click on the  icon, a Change Status window appear. Select **Complete (COMP)** status and click on the **OK** button.



The screenshot displays the Maximo 7.5 Work Order Tracking interface. The main window shows work order details for '23999759' with the description 'WALL FOLD TABLES/BENCHES REPLACEMENT'. The status is currently 'WREVIEW'. A 'Change Status' dialog box is open, allowing the user to change the status. The dialog box contains the following fields:

- Work Order: 23999759
- Description: WALL FOLD TABLES/BENCHES REPLACEMENT
- Status: WREVIEW
- New Status: Completed (CO) (indicated by a red arrow)
- Status Date: 9/19/13 4:45 PM
- Memo: (empty)
- Print Work Order(s)? (checkbox)
- Change work order status in back ground? (checkbox)
- Notification E-mail for Work Order Change Status: danny.lu@lausd.net
- OK button (indicated by a red arrow)

The background interface includes tabs for 'List', 'Work Order', 'Plans', 'WO Details', 'Related Records', 'Actuals', 'Safety Plan', 'Log', 'Failure Reporting', and 'Specifications'. It also shows a table of tasks for the work order, with columns for Sequence, Task #, Mat Cat, and Craft.

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