



Los Angeles Unified School District

Maximo 7.6 / Procurement

PICO Warehouse Purchasing Guide



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DEFINITION

On November 13, 2012, Board of Education adopted *Buy and Use LAUSD First* Resolution. This Resolution requires all schools and offices to purchase daily supplies and materials from the District Warehouse Catalog. For more information, click [HERE](#) to view MEM-6326.0, *LAUSD General Stores Distribution Purchase Policy*, dated, July 21, 2014. You may also click [HERE](#) to view the entire *Buy and Use LAUSD First* Board Resolution.

Pico Warehouse Purchasing Guide details step by step instructions on how to process purchases for materials available from LAUSD General Stores Warehouse, located in Pico Rivera.

PREREQUISITE

An item needs to be created in the Item Master application first before it can be purchased. If an item cannot be located in the Item Master application, please contact the Maximo team.

For Storeroom purchases, item first needs to be added to Storeroom Inventory.

Click [HERE](#) for guide on How to add an item.

LOGIN

The requestor performs this function.

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

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

A screenshot of the Maximo 7.6 login interface. The window has a blue header with "Tivoli. software" on the left and "IBM." on the right. The main content area has a light blue background. On the left, there is a circular logo for "LOS ANGELES UNIFIED" with a large "LA" in the center and "READY FOR THE WORLD" at the bottom. To the right of the logo, the text "TRAINING Stg00" is displayed. Below this, there are two input fields: "User Name:" with the text "luz.reyes" entered, and "Password:" with a masked password represented by dots. A "Sign In" button is located to the right of the password field. At the bottom of the window, a copyright notice reads: "© Copyright IBM Corp. 2007-2020. All rights reserved. See product license for details."

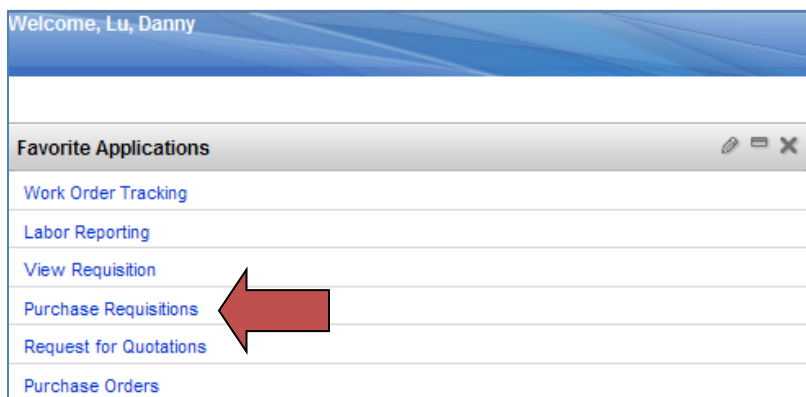


1. CREATE PURCHASE REQUISITION

START CENTER

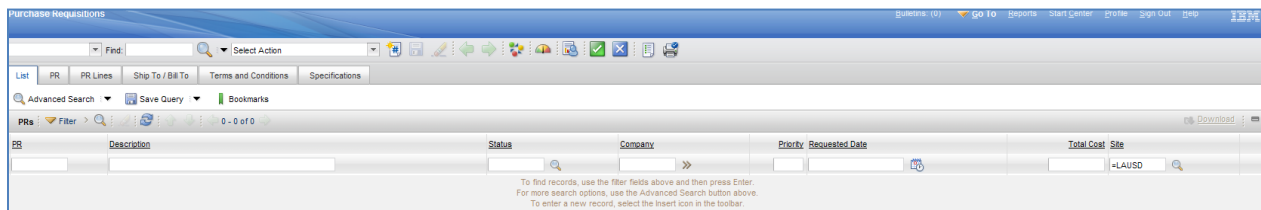
After logging in, the **Maximo Start Center** page will be displayed.

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



PURCHASE REQUISITION HOME

The Purchase Requisition home screen will be displayed. Existing Purchase Requisition records may be searched from this screen.



NEW PURCHASE REQUISITION

Click on the  icon to create a new Purchase Requisition.





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

Purchase Requisitions

Query Find PR Select Action

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

PR: 561918 * Test PICO Warehouse Purchase, STORES-1 Status: WAPPR

In the **Description** field, type in description.

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.

Fill in the following fields:

PR Type Type **PICO** or click on the **magnifying glass**  icon next to the **Req Type** field and select **PICO (PICO Warehouse)**.

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

Company Company information will auto populate.

Sample screen shot:

Purchase Requisitions

Query Find PR Select Action

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

PR: 561918 * Test PICO Warehouse Purchase, STORES-1 * Req Type: PICO Status:

Details

* Priority: 0

Requested By: 783764 Han, Helena

Supervisor: 658946 Cortez, Elmer

* Area/Office: CENTRAL M&O Central

Dates

Status Date: 1/31/22 12:50 PM

Requested Date: 1/31/22 12:50 PM

Required Date:

Vendor

Company: PICO General Stores

Address: 8525 Rex Road

City: Pico Rivera

State/Province: CA

ZIP/Postal Code: 90660

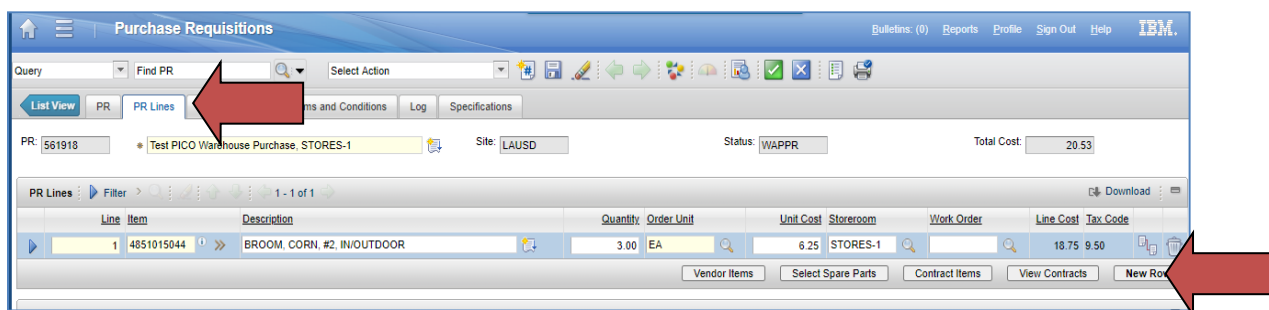


To save, click on the floppy disk . Look for the message at the top of the screen, “**Record has been saved.**”

2. CREATE PR LINE ITEMS

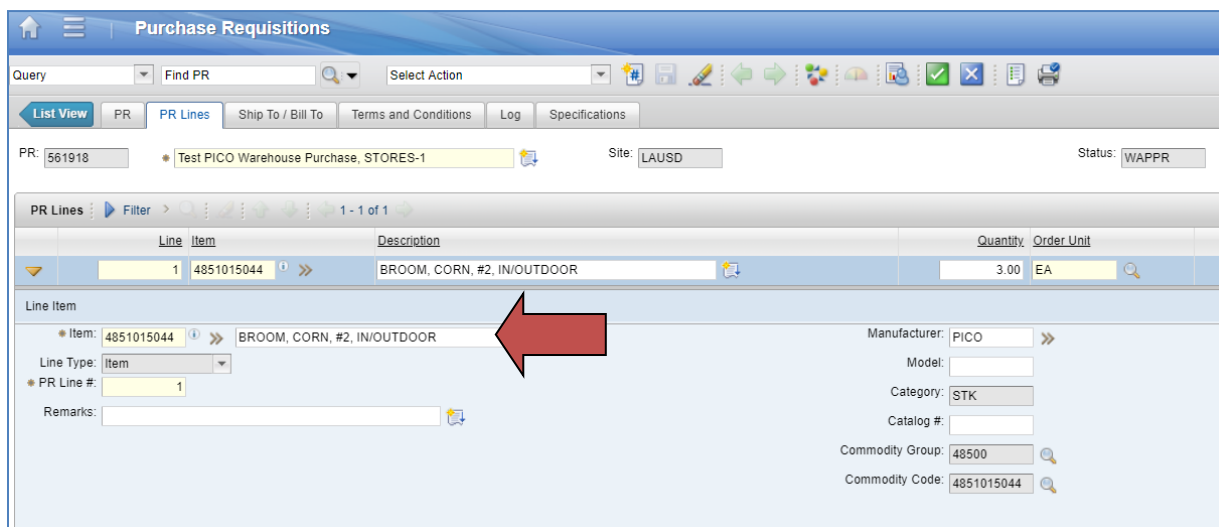
Click on the **PR Lines** tab.

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



The screenshot shows the 'Purchase Requisitions' window. The 'PR Lines' tab is selected. A table lists the PR lines with columns: Line, Item, Description, Quantity, Order Unit, Unit Cost, Storeroom, Work Order, Line Cost, and Tax Code. The first line is highlighted. A red arrow points to the 'PR Lines' tab, and another red arrow points to the 'New Row' button at the bottom right.

Enter the **Commodity Code** number in the **Item** field. Overtyping the defaulted description to better describe the item.



The screenshot shows the 'Line Item' details for the selected PR line. The 'Item' field is highlighted with a red arrow. The 'Description' field is also visible. The 'Commodity Code' is entered as 4851015044. The 'Manufacturer' is PICO, and the 'Commodity Group' is 48500.

If the **Commodity Code** number is not known, it can be found by clicking on the  icon to the right of the Item field. Click on **Select Value**.

The screenshot shows the 'PR Lines' window in Maximo. At the top, there's a 'Filter' button and a status bar indicating '1 - 1 of 1'. Below this is a table with columns 'Line', 'Item', and 'Description'. The first row shows 'Line: 1' and an empty 'Item' field. A red arrow points to the 'Item' field, and another red arrow points to the 'Select Value' option in the context menu that appears when the field is clicked. The context menu also includes options for 'Classification', 'Attributes', 'Go To', 'View Item Availability', and 'View Image'. Below the table, the 'Line Item' section contains fields for '* Line:' (set to 1), '* Line Type:' (set to Item), and '* Item:' (empty). A 'Remarks:' field is also present.

A new window will appear with a list of Items in Maximo. In this window, items may be searched using the **Description** column. To select an Item number, click on the **Item Number** or the **Description**. Items may also be searched using the General Stores Catalog: <https://storescatalog.lausd.net/>



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 selecting the **Item Number** or the **Description**, the Item Number will be returned to the **Item** field. Overtyping the defaulted description 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

After entering the Item number, update the **Quantity, Unit Cost, and Work Order Number** OR **Storeroom Name**.

Click on the floppy disk  icon to save. If there are 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.

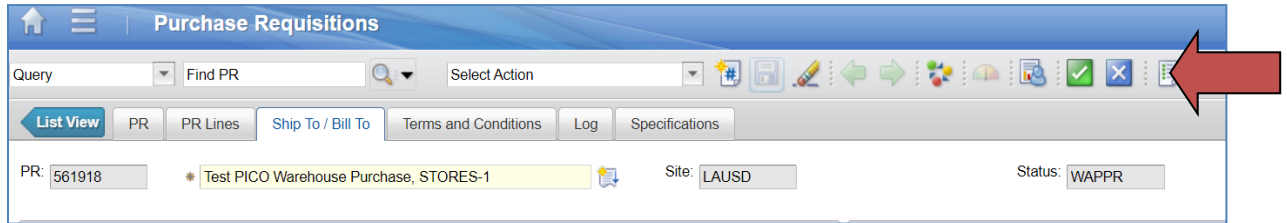
Enter the M&O Area's section code in the **Ship To** and **Bill To** field. Enter the requestor's employee number in the **Attention** field.

Click on the floppy disk  icon to save.



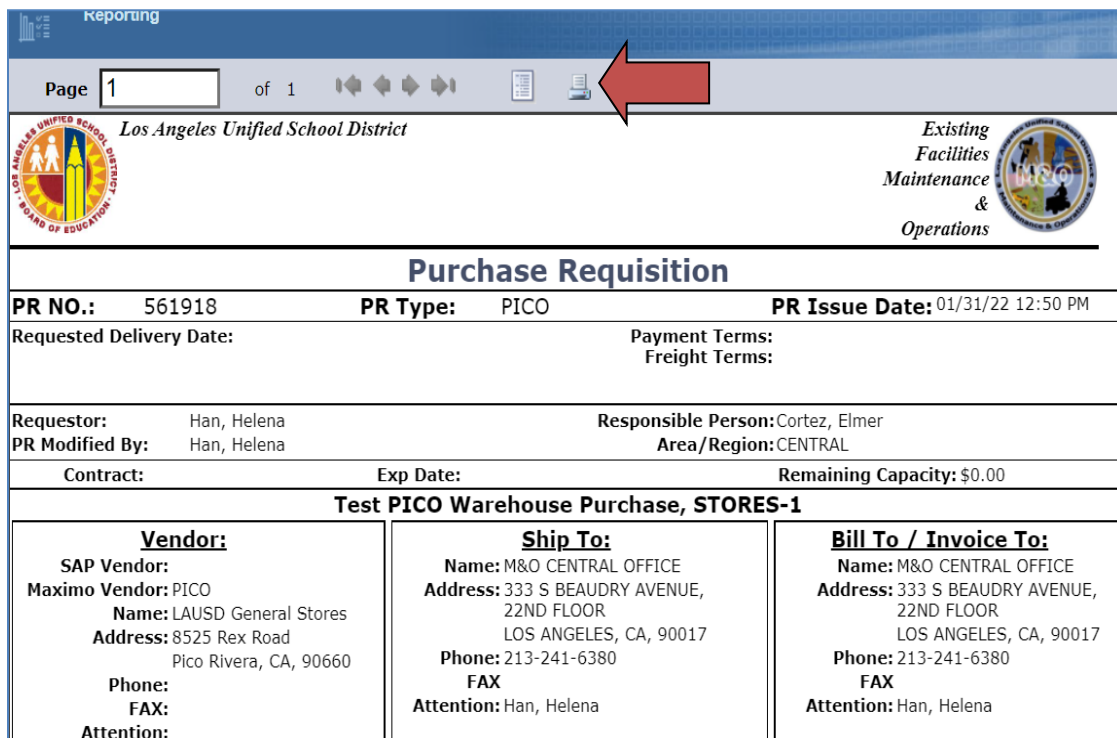
4. PRINT THE PURCHASE REQUISITION REPORT

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



The screenshot shows the 'Purchase Requisitions' window. The top toolbar contains various icons, including a printer icon. A red arrow points to this printer icon. Below the toolbar, there are tabs for 'List View', 'PR', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', 'Log', and 'Specifications'. The 'PR' tab is selected. Below the tabs, there is a search bar with 'Find PR' and a 'Select Action' dropdown. Below that, there are fields for 'PR: 561918', 'Test PICO Warehouse Purchase, STORES-1', '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.



The screenshot shows the 'BIRT Report Viewer' window. The top toolbar contains various icons, including a printer icon. A red arrow points to this printer icon. Below the toolbar, there is a header section with the 'Los Angeles Unified School District' logo and 'Existing Facilities Maintenance & Operations' logo. The main content area is titled 'Purchase Requisition' and contains the following information:

PR NO.: 561918	PR Type: PICO	PR Issue Date: 01/31/22 12:50 PM
Requested Delivery Date:		Payment Terms:
		Freight Terms:
Requestor: Han, Helena		Responsible Person: Cortez, Elmer
PR Modified By: Han, Helena		Area/Region: CENTRAL
Contract:	Exp Date:	Remaining Capacity: \$0.00
Test PICO Warehouse Purchase, STORES-1		
Vendor: SAP Vendor: Maximo Vendor: PICO Name: LAUSD General Stores Address: 8525 Rex Road Pico Rivera, CA, 90660 Phone: FAX: Attention:	Ship To: Name: M&O CENTRAL OFFICE Address: 333 S BEAUDRY AVENUE, 22ND FLOOR LOS ANGELES, CA, 90017 Phone: 213-241-6380 FAX: Attention: Han, Helena	Bill To / Invoice To: Name: M&O CENTRAL OFFICE Address: 333 S BEAUDRY AVENUE, 22ND FLOOR LOS ANGELES, CA, 90017 Phone: 213-241-6380 FAX: Attention: Han, Helena

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.



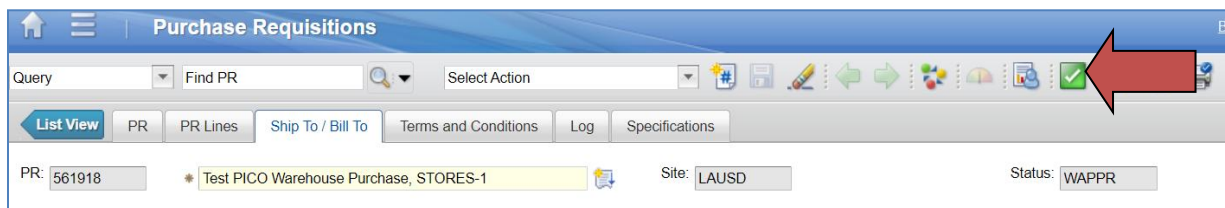
AFSD signs Requisitions for up to 75,000, **RFD** for \$75,001-\$150,000, and **Deputy Director** for over \$150,000.

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

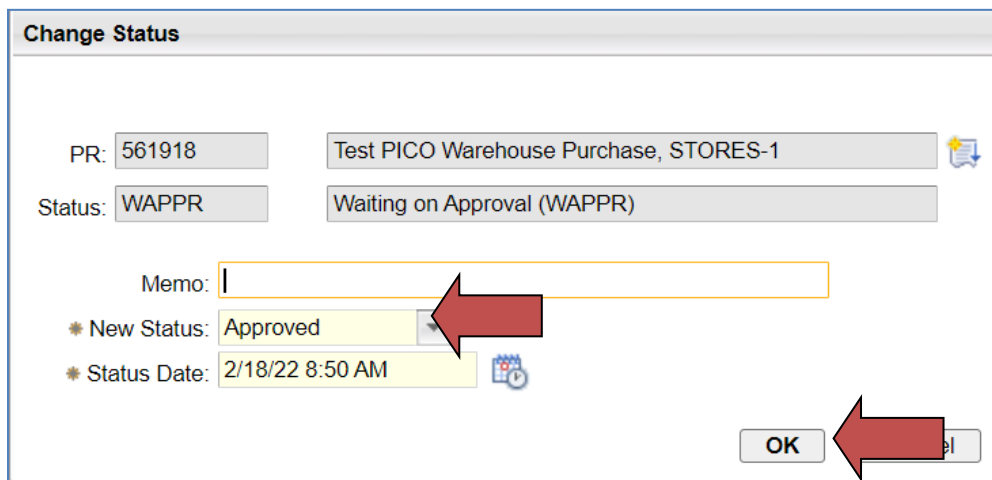
5. APPROVE PURCHASE REQUISITION

Clerical performs this function.

On the **Purchase Requisition** 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.





6. SUBMIT SAP REQUEST

Clerical performs this function.

Using information on approved **Purchase Requisition**, create **Shopping Cart** in SAP. Click [HERE](#) for instructions. Once **Shopping Cart** is approved, request is sent to PICO warehouse for processing.

Make note of **Shopping Cart** number.

Create Shopping Cart

Order | Print Preview | Close | Save | Check | Export | Import

Number **1001570134** Name SLAITYRA0001 06/26/2023 15:25 Status In Process Cre

▼ General Data

Buy on Behalf of: 161742 Sonali Laity Ramenaden Delivery Priority:

Name of shopping cart: SLAITYRA0001 06/26/2023 15:25 Preferred Vendor: I

Default Settings: Set Values * Competitive:

Header Data: Values * PO Event Type:

Approval Process: Display / Edit Agents Invoice Processor:

Document Changes: Display SBE Preference:

* FM Posting Date: 06/26/2023 FASTER PO Ind:

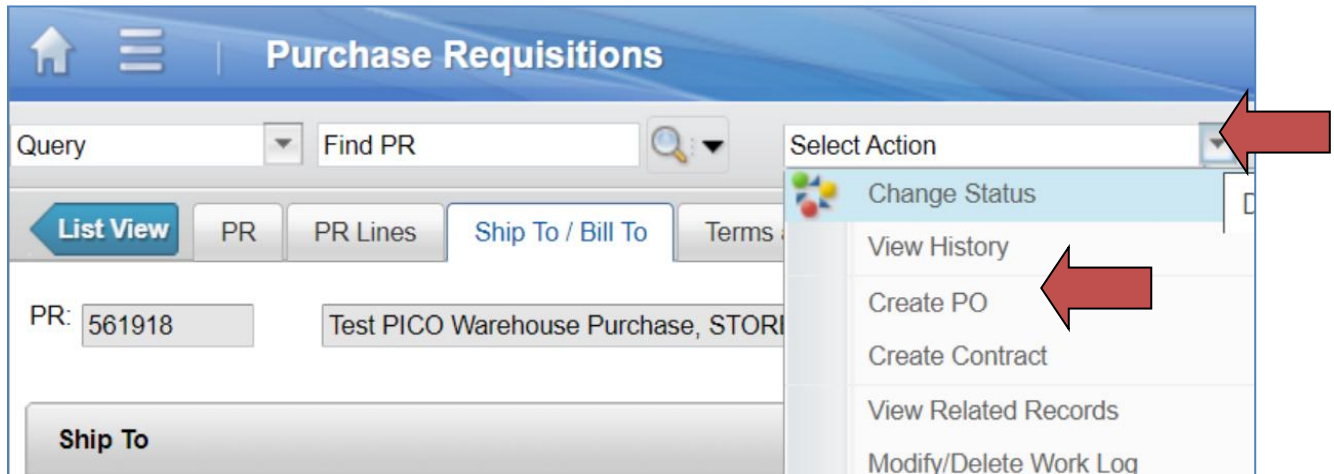
☐ DELIVER BY JUNE 30 FASTER Work Order Number:

☐ Email Po Ind:



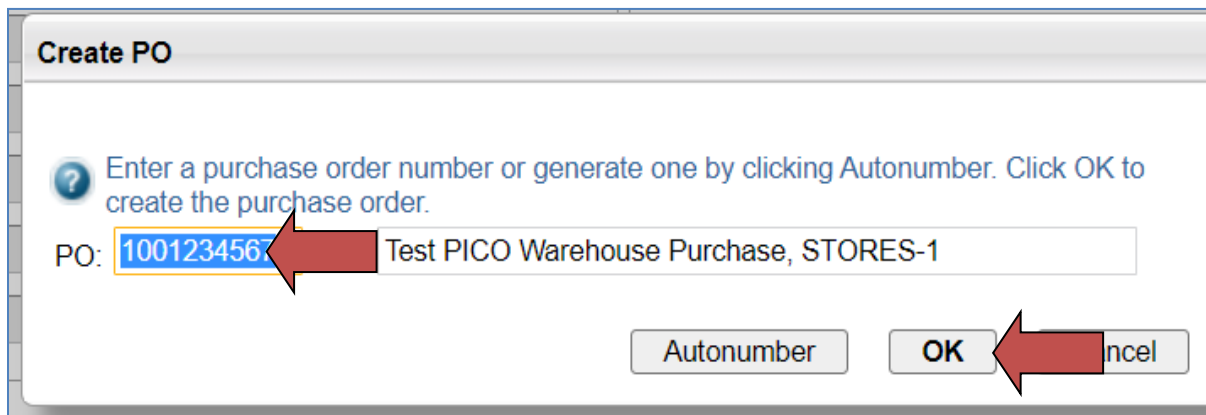
7. CREATE PURCHASE ORDER IN MAXIMO

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



The **Create PO** window will appear. Enter **Shopping Cart** number generated from SAP.

Click on the **OK** button.



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



The screenshot shows the 'Purchase Requisitions' form in Maximo. At the top, there's a header with a home icon, a menu icon, and the title 'Purchase Requisitions'. Below this is a search bar with 'Query' and 'Find PR' fields, and a 'Select Action' dropdown. A toolbar with various icons is also present. Below the search bar, there are tabs for 'List View', 'PR', 'PR Lines', 'Ship To / Bill To', 'Terms and Conditions', 'Log', and 'Specifications'. The 'List View' tab is active. Below the tabs, there are input fields for 'PR: 561918', 'Test PICO Warehouse Purchase, STORES-1', 'Site: LAUSD', and 'Status: CLOSE'. A red arrow points to the 'CLOSE' button.

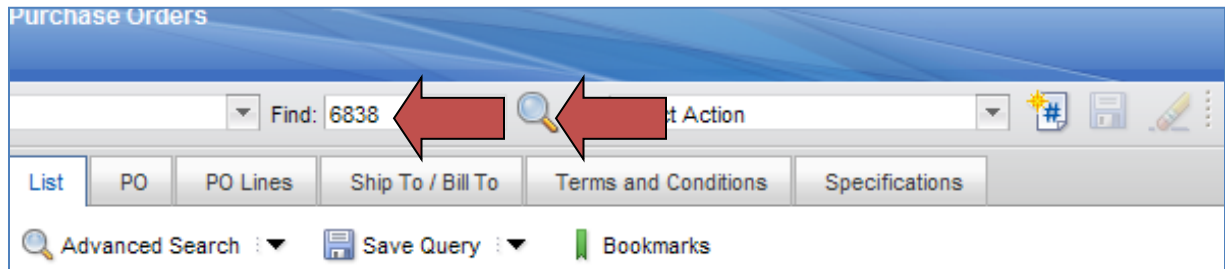
APPROVE PO

Under the **Favorite Application** section, click on the **Purchase Order** application.

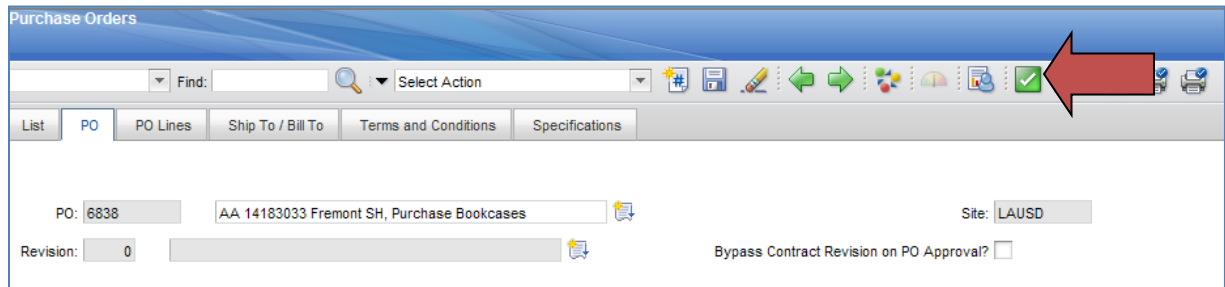
The screenshot shows the 'Favorite Applications' section in Maximo. At the top, there's a header with a home icon, a menu icon, and a welcome message 'Welcome, Reyes, Luz (Lea)'. Below this, there are tabs for 'AFSD' and 'M&O'. The 'M&O' tab is active. Below the tabs, there's a section titled 'Favorite Applications' with a list of applications: 'Work Order Tracking', 'Labor Reporting', 'View Requisition', 'Purchase Requisitions', 'Request for Quotations', 'Purchase Orders', 'Receiving', 'Preventive Maintenance', 'Assets', 'Job Plans', 'Invoices', 'Work Requests', 'Companies', 'Purchase Contracts', and 'Issues and Transfers'. A red arrow points to the 'Purchase Orders' link.



The **Purchase Order** application will be displayed. Search for the Purchase Order by entering the Shopping Cart number in the find field and click on the  to search.

This screenshot shows the 'Purchase Orders' application window. At the top, there is a search bar with a dropdown arrow, the text 'Find: 6838', and a magnifying glass icon. Two red arrows point to the search bar and the magnifying glass icon respectively. Below the search bar is a row of tabs: 'List', 'PO', 'PO Lines', 'Ship To / Bill To', 'Terms and Conditions', and 'Specifications'. At the bottom, there are three buttons: 'Advanced Search' with a magnifying glass icon, 'Save Query' with a floppy disk icon, and 'Bookmarks' with a bookmark icon.

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

This screenshot shows the 'Purchase Orders' application window with a specific record selected. The 'Find' field is empty, and the 'Select Action' dropdown is open. A red arrow points to a green checkmark icon in the top tool bar. Below the tabs, the record details are displayed: 'PO: 6838', 'AA 14183033 Fremont SH, Purchase Bookcases', and 'Site: LAUSD'. There is also a 'Revision: 0' field and a 'Bypass Contract Revision on PO Approval?' checkbox.

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

Change Status

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases

Revision: 0

Status: WAPPR Waiting on Approval (WAPPR)

Memo:

* New Status: **Approved (APF)**

* Status Date: 7/5/13 3:24 PM

Memo:

OK

8. OPTIONAL: MODIFY PURCHASE ORDER

The Requestor performs this function

To modify 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

Change Status

View History

Copy PR Line Items To PO

Create Contract

Complete Receipts

Revise PO

View Revision History

PO: 6838 AA 14183033 Fremont SH, I

Revision: 0

Site: LAUSD

Bypass Contract Revision on PO Approval? ☐

A **Revise PO** window will appear. To the right of the PO number, type in the 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? ☒

OK

After clicking **OK**, the revised **PO record** will appear. Noticed that the Revision number is now 1 and the status is **PNDREV (Pending Revision)**.

Purchase Orders
lanny.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 Status: PNDREV

Revision: 1

Bypass Contract Revision on PO Approval? ☐

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

Purchase Orders
lanny.ju on MaxCron01

Find: Select Action

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

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

Revision: 1

PO Lines: Filter 1 - 1 of 1

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

Vendor Items Contract Items Select Spare Parts Vendor Analysis

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



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 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.

AFSD signs Requisitions for up to \$75,000, **RFD** for \$75,001-\$150,000, and **Deputy Director** for over \$150,000.

Submit the signed **Modified PO** report to Clerical for processing.

APPROVE PO

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

Note: Ensure that **Revision 1** PO is displayed. If not, click on the **List** tab and select the revision 1 PO.



Maximo 7.6 / PICO Warehouse Purchasing Guide

Purchase Orders
danny.lu on MaxCron00

BMXAA42051 - Record has been saved.

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 #: >>

Vendor

Company: 107679-A W W GRAINGER INC
Address: 8930 WINNETKA AVE
City: NORTHDRIDGE
State/Province: CA

Change Status

PO: 6838 AA 14183033 Fremont SH, Purchase Bookcases

Revision: 1 Modify line one cost.

Status: PNDREV Pending Revision

Memo:

New Status: Approved (APF)
Status Date: 9/9/13 9:54 AM

Memo:

OK

Clerical to submit an **ORDER ADJUSTMENT FORM**, per the **Modified Purchase Order**. Click [HERE](#) for form and follow the instructions.

Submit **Modified Purchase Order** report back to the requestor for filing/holding.

9. RECEIVE LINE ITEM IN RECEIVING APPLICATION

The Requestor performs this function

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

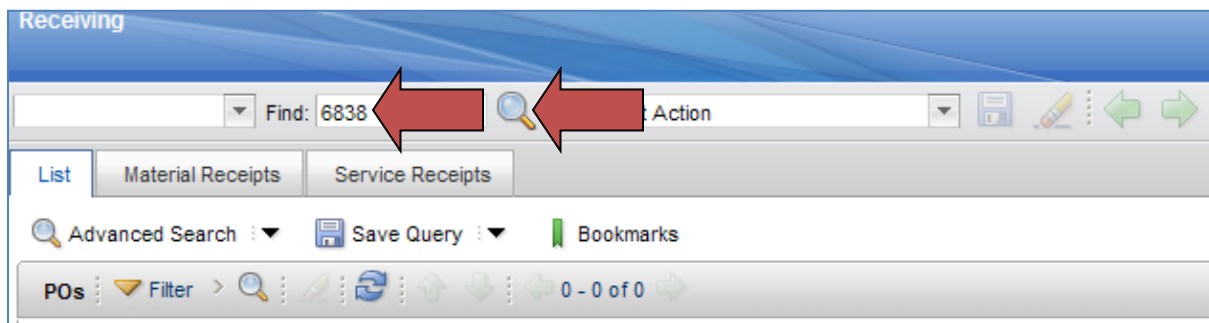
Welcome, Lu, Danny

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.



Receiving

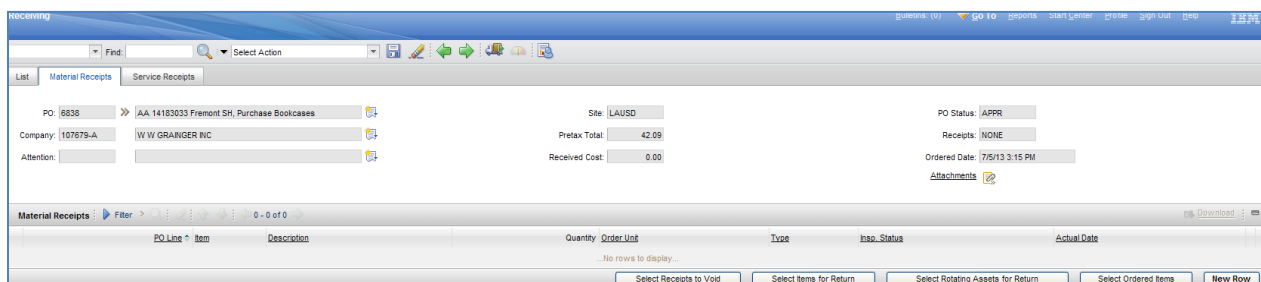
Find: 6838 Action

List Material Receipts Service Receipts

Advanced Search Save Query Bookmarks

POs Filter 0 - 0 of 0

The **Materials Receipt** tab of the record will appear. **Note:** Ensure that the correct PO (if there are revisions) is displayed. If not, click on the **List** tab and select the correct revised PO.



Receiving

Find: Select Action

List Material Receipts Service Receipts

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

Company: 107879-A W W GRANGER INC Pretax Total: 42.09 Receipts: NONE

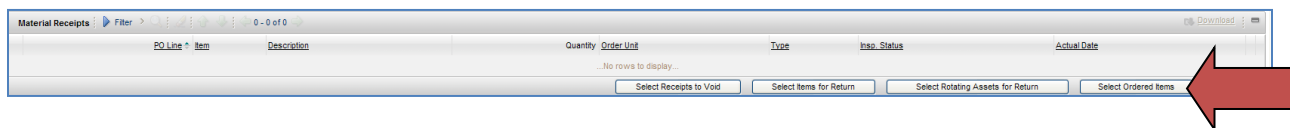
Attention: Received Cost: 0.00 Ordered Date: 7/5/13 3:15 PM Attachments

Material Receipts: Filter 0 - 0 of 0

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date
...No rows to display...							

Select Receipts to Void Select Items for Return Select Rotating Assets for Return Select Ordered Items New Row

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



Material Receipts: Filter 0 - 0 of 0

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date
...No rows to display...							

Select Receipts to Void Select Items for Return Select Rotating Assets for Return Select Ordered Items New Row



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

Select Ordered Items

Storeroom:

Find

Ordered Items Filter: 1 - 1 of 1 Download

PO Line	Item	Description	Packing Slip	To Storeroom	Quantity Due	Quantity Ordered	Invoice	Remarks
☒	1	3207400000 Screws, Wood 1/2"			3.00	0		

OK

The previous screen will be displayed. Click on the floppy disk  icon to save the record. The Receipts status will be in **WINSP** status.

10. VOIDING UNAPPROVED RECEIPTS

Unapproved receipts can be voided/removed by selecting the “Select Receipts to Void” button and choosing the line/s to be voided. Ensure the PO version is in **APPR** status. The receiving application will default to the latest version. The PO versions can be navigated by using the green navigational arrows at the top of the page or by selecting the list view tab.

List View Material Receipts Service Receipts

PO: 4500018982 Existing Path of Travel Corrective Work Site: LAUSD PO Status: APPR

PO Rev: 0 Pretax Total: 47,650.00 Receipts: NONE

Company: 196706-9 VALLE GRANDE CONSTRUCTION Received Cost: 47,650.00 Ordered Date: 8/22/13 10:22 AM

Attention: 797321 Hudson, Don Attachments

Material Receipts Filter: 1 of 3

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date	Interface Status	Interface Remarks
1	9120000000	CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENAI	47,650.00	EA	RECEIPT	COMP	7/5/23 3:40 PM		
1	9120000000	CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENAI	47,650.00	EA	RECEIPT	WINSP	7/5/23 3:42 PM		
1	9120000000	CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENAI	47,650.00	EA	VOIDRECEIPT	COMP	7/5/23 3:42 PM		

Select Receipts to Void

Select the receipts that you want to void. Receipts that are not available to void do not appear.

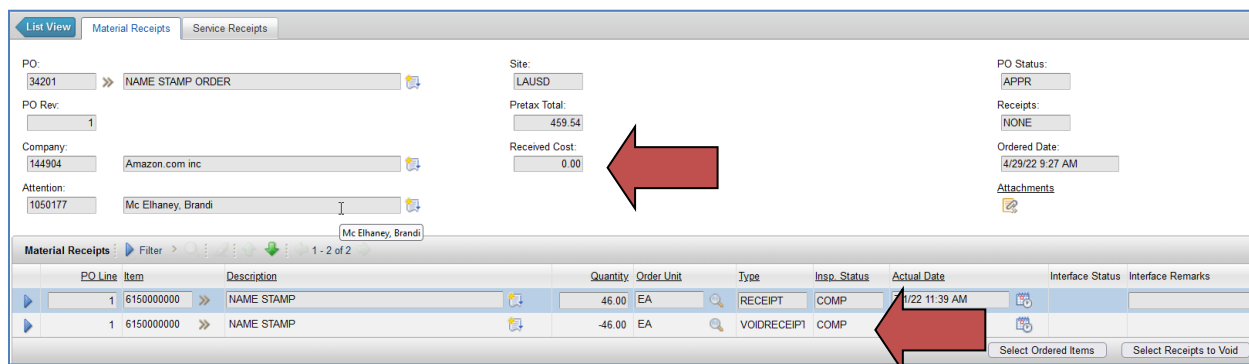
Receipts Filter: 1 - 1 of 1 Download

PO Line	Item	Description	Quantity	Actual Date	Entered By	Remarks
☒	1	9120000000 CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)	47,650.00	7/5/23 3:42 PM	LUZ REYES	

OK Cancel



Click on the floppy disk  icon to save the record. The void receipt/s are automatically approved. When an unapproved receipt is voided, the original receipt will also automatically be approved in the process. The received cost will be updated to reflect the revised amount received.



11. OBTAIN SIGNATURES AND SUBMIT PO PACKAGE TO CLERICAL

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. ○ Example 1: If the unit of measurement on the purchase order is 200 square feet of playground matting, measure actual installed matting square footage. ○ 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.



Requested By: Reyes, Luz (Leah)	7/5/23
Approved to Modify (Print Name / Signature / Title)	Date
PO Successfully Updated By (Print Name / Signature / Title)	Date
Inspected By (Print Name / Signature / Title)	Date
Received By (Print Name / Signature / Title)	Date
Approved To Pay (Print Name / Signature / Title)	Date

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** to **Clerical** to approve the receipts and process the PO for payment.

12. APPROVING THE UNAPPROVED RECEIPTS

Clerical performs this function

Navigate to the Receiving application and search for the PO. Select the **“Approve Receipts”** from the **Select Action** dropdown.

Query: Find PO

Select Action: **Approve Receipts**

PO: 4500077709 >> REPLACE DETERIORATED HVAC UNITS

PO Rev: 0

Company: 101668-B ASSOCIATED OF LOS ANGELES - (BLOC)

Attention: 796482 Szabo, Mikal

Site: LAUSD

Pretax Total: 534.32

Received Cost: 0.00

PO Status: APPR

Receipts: NONE

Ordered Date: 6/10/14 3:51 PM

Attachments

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date	Interface Status	Interface Remarks
1	6701511149	MAGNETIC NUT DRIVERS 1/4 INCH	-25.00	EA	RETURN	COMP	11/12/14 1:37 PM	INTCOMP	Material document 5000446997
1	6701511149	MAGNETIC NUT DRIVERS 1/4 INCH	25.00	EA	RECEIPT	COMP	6/26/14 4:45 PM	INTCOMP	Material document 5000312049
2	6701511149	MAGNETIC NUT DRIVERS 5/16 INCH	-25.00	EA	RETURN	COMP	11/12/14 1:37 PM	INTCOMP	Material document 5000446998
2	6701511149	MAGNETIC NUT DRIVERS 5/16 INCH	25.00	EA	RECEIPT	COMP	6/26/14 4:45 PM	INTCOMP	Material document 5000312050
3	6701511149	MAGNETIC NUT DRIVERS 3/8 INCH	25.00	EA	RECEIPT	COMP	6/26/14 4:45 PM	INTCOMP	Material document 5000312051
3	6701511149	MAGNETIC NUT DRIVERS 3/8 INCH	-25.00	EA	RETURN	COMP	11/12/14 1:37 PM	INTCOMP	Material document 5000446999
4	6701511149	MAGNETIC BIT HOLDER	12.00	EA	RECEIPT	COMP	6/26/14 4:45 PM	INTCOMP	Material document 5000312052
4	6701511149	MAGNETIC BIT HOLDER	-12.00	EA	RETURN	COMP	11/12/14 1:37 PM	INTCOMP	Material document 5000447000

Select Ordered Items Select Receipts to Void

A window will appear with the unapproved receipt/s in **WINSP** status. Check the receipt lines that match quantities and the PO line numbers from the signed PO report. Select **OK** to complete the approval action.



Change Inspection Status

Material Receipts Service Receipts

Material Receipts Filter 1 - 6 of 6 Download

☐	PO Line	Item	Description	Inspected Qty	Approved Quantity
☒	1	0314520393	1" MERV 13, 15"X30-5/8X1" (450-499 SQ IN)	24.00	24.00
☒		0314520393	1" MERV 13, 16"X30"X1" (450-499 SQ IN)	12.00	12.00
☐	3	0314520402	1" MERV 13, 18"X34-1/2"X1" (600-649 SQ IN)	24.00	24.00
☐	4	0314520237	16" X 25" X 2" MERV 13	12.00	12.00
☐	5	0314520234	16" X 20" X 2" MERV 13	12.00	12.00
☐	6	0314520249	20" X 25" X 2" MERV 13	24.00	24.00

OK Cancel

The system will create the **TRANSFER** type lines and change the Insp status to **COMP**. This action will also update the receipts status.

List View Material Receipts Service Receipts

PO: 4500576923 S1:NA-107TH EL WOV30797467 - AAF MERV13 FILTERS Site: LAUSD

PO Rev: 0 Pretax Total: 635.04

Company: 1000011547 AMERICAN AIR FILTER COMPANY, INC. AAF INTERNATIONAL Received Cost: 635.04

Attention:

PO Status: APPR Receipts: COMPLETE Ordered Date: 7/23/20 1:09 PM Attachments

Material Receipts Filter 1 - 12 of 12

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date	Interface Status
1	0314520393	1" MERV 13, 15"X30-5/8X1" (450-499 SQ IN)	24.00	EA	TRANSFER	COMP	8/17/22 8:46 AM	
1	0314520393	1" MERV 13, 15"X30-5/8X1" (450-499 SQ IN)	24.00	EA	RECEIPT	COMP	8/17/22 8:46 AM	
2	0314520393	1" MERV 13, 16"X30"X1" (450-499 SQ IN)	12.00	EA	TRANSFER	COMP	8/17/22 8:46 AM	
2	0314520393	1" MERV 13, 16"X30"X1" (450-499 SQ IN)	12.00	EA	RECEIPT	COMP	8/17/22 8:46 AM	
3	0314520402	1" MERV 13, 18"X34-1/2"X1" (600-649 SQ IN)	24.00	EA	RECEIPT	COMP	8/17/22 8:46 AM	

13. ATTACHING THE PURCHASE ORDER PACKAGE TO THE PO APPLICATION

Clerical performs this function

Select the attachment icon  for the "Add New Attachment \ Add New File"



Maximo 7.6 / PICO Warehouse Purchasing Guide

Receiving

Query Find PO Select Action

List View Material Receipts Service Receipts

PO: 39482 S2 - OK - 26833561, M & O Area S2 - Office Supplies. Site: LAUSD PO Status: APPR

PO Rev: 0 Prefax Total: 1,381.40 Receipts: NONE

Company: 107540-B GLOBAL INDUSTRIAL EQUIPMENT Received Cost: 0.00 Ordered Date: 2/23/23 1:08 PM

Attention: 709593 Barreda Jr., Lionel

Material Receipts Filter 0 - 0 of 0

PO Line Item Description Quantity Order Unit Type Inso. Status Actual Date

There are no rows to display

Select Ordered Items Select Receipts to Void Select Items for Return

Select the “Choose Files” button and navigate to the file to be attached and then choose the **OK** button.

Create a File Attachment

Only files with the following formats can be enabled for printing: .pdf, .xls, .csv, .txt, .doc, .gif, .jpg, .ppt. Clear the check box beside the Print attached document with report if printable type option (Advanced Option) if the file being attached is not in one of these formats.

Select a Folder: Attachments

Choose Files No file chosen

Name the document:

Advanced Options

Copy document to the default location set by your administrator (recommended)? ☒

Add document to the document library for others to use? ☐

Print attached document with report if printable type? ☐

OK Cancel

14. RETURNING APPROVED RECEIPTS

Approved receipts can be returned by selecting the “Select Items to Return” button and choosing the line/s to be returned. Click the **OK** button on the window and click on the floppy disk icon to save the record. Ensure the PO version is in **APPR** status. The receiving application will default to the latest version. The PO versions can be navigated by using the green navigational arrows at the top of the page or by selecting the list view tab.



Maximo 7.6 / PICO Warehouse Purchasing Guide

The return line/s will be created. The receipt status and received cost will also be updated based on the lines returned.

Query: Find PO Select Action

PO: 32473 TSU NA STOCK SUPPLY WACO FILTERS Site: LAUSD PO Status: APPR

PO Rev: 1 Pretax Total: Receipts:

Company: 1000008741 WACO FILTERS CORPORATION

Attention: 737983 Rodriguez, Ricardo

Material Receipts: Filter 1 - 9 of 9

Select Items for Return

PO Line	Item	Description	Quantity to Return	Transaction Date	Entered By
1	0314500000	Filters, 16X25X2 MERV 13	1,995.00	11/4/20 1:32 PM	LUZ REYES
2	0314500000	Filters, 24X24X2 MERV 13	2,892.00	11/4/20 1:32 PM	LUZ REYES
3	0314500000	Filters, 25X25X2 MERV 13	2,892.00	11/4/20 1:32 PM	LUZ REYES
4	0314500000	Filters, 16X20X1 MERV 13	336.00	11/4/20 1:32 PM	LUZ REYES
5	0314500000	Filters, 16X25X1 MERV 13	336.00	11/4/20 1:32 PM	LUZ REYES
6	0314500000	Filters, 20X20X1 MERV 13	336.00	11/4/20 1:32 PM	LUZ REYES
7	0314500000	Filters, 20X25X1 MERV 13	336.00	11/4/20 1:32 PM	LUZ REYES
8	0314500000	Filters, 16X25X4 MERV 13	336.00	11/4/20 1:32 PM	LUZ REYES
9	0314500000	Filters, 20X25X4 MERV 13	193.00	11/4/20 1:32 PM	LUZ REYES

OK Cancel

193.00 EA RECEIPT COMP 11/4/20 1:32 PM

Select Ordered Items Select Receipts to Void Select Items for Return

Query: Find PO Select Action

PO: 32473 TSU NA STOCK SUPPLY WACO FILTERS Site: LAUSD PO Status: APPR

PO Rev: 1 Pretax Total: 82,365.99 Receipts: PARTIAL

Company: 1000008741 WACO FILTERS CORPORATION Received Cost: 11,264.82 Ordered Date: 7/22/20 2:25 PM

Attention: 737983 Rodriguez, Ricardo Attachments

Material Receipts: Filter 1 - 12 of 12

PO Line	Item	Description	Quantity	Order Unit	Type	Insp. Status	Actual Date	Interface
1	0314500000	Filters, 16X25X2 MERV 13	1,995.00	1	RECEIPT	COMP	11/4/20 1:32 PM	
1	0314500000	Filters, 16X25X2 MERV 13	-1,995.00	1	RETURN	COMP	7/6/23 8:25 AM	
2	0314500000	Filters, 24X24X2 MERV 13	2,892.00	EA	RECEIPT	COMP	11/4/20 1:32 PM	
2	0314500000	Filters, 24X24X2 MERV 13	-2,892.00	EA	RETURN	COMP	7/6/23 8:25 AM	
3	0314500000	Filters, 25X25X2 MERV 13	2,892.00	EA	RECEIPT	COMP	11/4/20 1:32 PM	
3	0314500000	Filters, 25X25X2 MERV 13	-2,892.00	EA	RETURN	COMP	7/6/23 8:25 AM	

For any questions, please email John Herweg at John.Herweg@lausd.net or Mark Merrick at Mark.Merrick@lausd.net.