

Los Angeles Unified School District

Maximo 7.5 / Procurement

Stock Material Requisition Guide / Service Call



DEFINITION

The **Stock Material Requisition Guide / Service Call** is designed for material requisitions against a local M&O Storeroom inventory against Service Call work orders. The guide details step by step instructions on how to reserve M&O Storeroom inventory in the Work Order Tracking application.

1. LOGIN

The requestor performs this function.

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

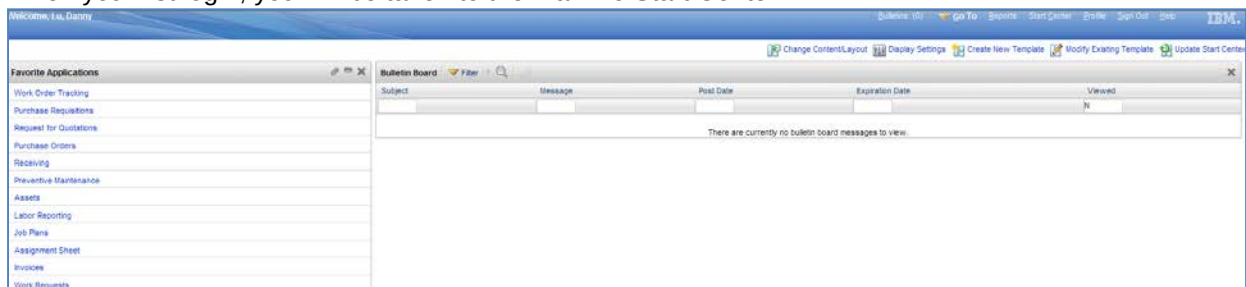
Enter your **Single sign-on** username and password and click on the **Sign In** button.



The login screen features the Tivoli Software and IBM logos at the top. The main heading is "Welcome to Maximo". On the left is a large 3D nut icon. To the right of the icon are two input fields: "User Name:" with the text "danny.lu" and "Password:" with masked characters. Below the password field is a "Sign In" button. At the bottom right are links for "Forgot Password?" and "New User? Register Now". The footer contains the copyright notice: "© Copyright IBM Corp. 2007-2012. All rights reserved. See product license for details."

START CENTER

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

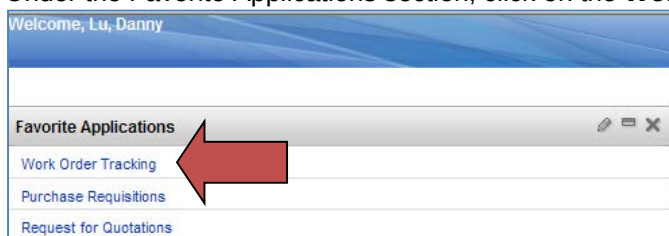


The Start Center dashboard includes a "Welcome, Danny" header with navigation links like "Go To", "Reports", "Start Center", "Home", "Sign Out", and "Help". Below the header is a "Favorite Applications" sidebar with links such as "Work Order Tracking", "Purchase Requisitions", "Request for Quotations",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



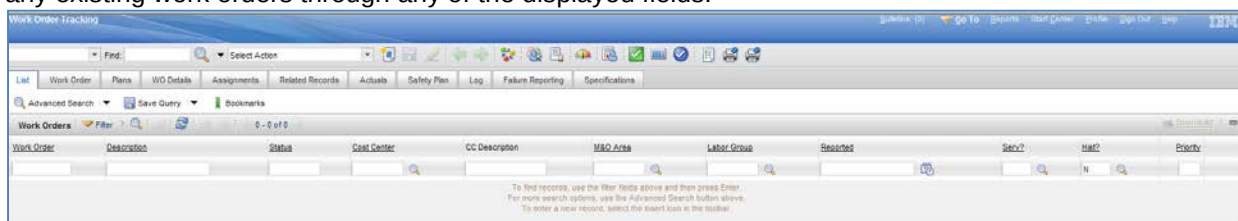
WORK ORDER TRACKING

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



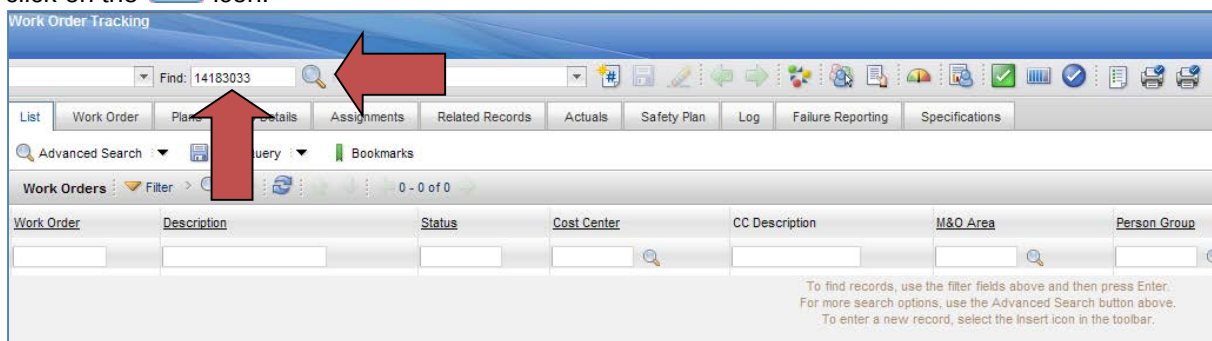
WORK ORDER TRACKING HOME

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. GO TO WORK ORDER

If you know your work order number, you can type in the work order number in the **Find:** field and click on the  icon.



If you do not know your work order number, you can search for the work order through your Saved Queries list or by running a new search. For more information on how to search for work orders, please see the **Query Management Guide**.



3. WORK ORDER IDENTIFIED, GO TO PLANS TAB TO ADD MATERIALS

Once you are on your work order record, click on the **Plans** tab.

Work Order Tracking

Find: [] Select Action []

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

Class: WORKORDER Parent WO: []

Work Order: 14183033 * Falling ceiling tiles in Main building, classroom 1 * Work Type: CM

In the **Plans** tab, click on the **Materials** tab on the bottom section.

Labor **Materials** Services Tools

Labor 0 - 0 of 0

Task	Craft	Craft Description	Labor Category
...No rows to display...			

Click on the **New Row** button.

Labor Materials Services Tools

Materials 0 - 0 of 0

Task	Mat Cat	Line Type	Craft	Item	Description	Quantity	Ava Cost	Line Cost	Storeroom	Direct Issue?
...No rows to display...										

Select Materials Select Asset Spare Parts **New Row**

Fill out the following fields

Enter **MA** for in the **Material Category** field.

Labor **Materials** Services Tools

Materials Filter 1 - 1 of 1

Task	Mat Cat	Line Type	Craft	Item
[]	MA	ITEM	[]	[]

Task: []

* Material Category: MA

The **Line Type** defaults to **Item**. Leave this value as is.

Labor **Materials** Services Tools

Materials Filter 1 - 1 of 1

Task	Mat Cat	Line Type	Craft	Item
[]	MA	ITEM	[]	[]

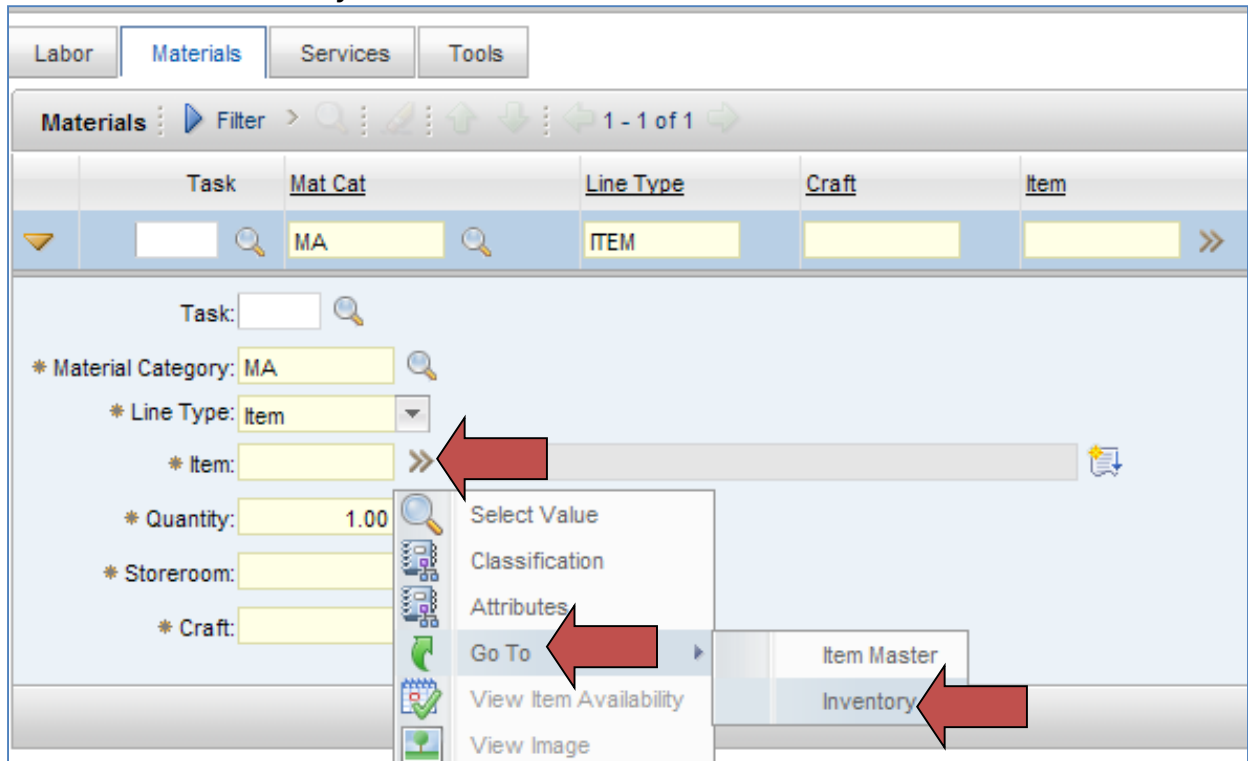
Task: []

* Material Category: MA

* Line Type: Item

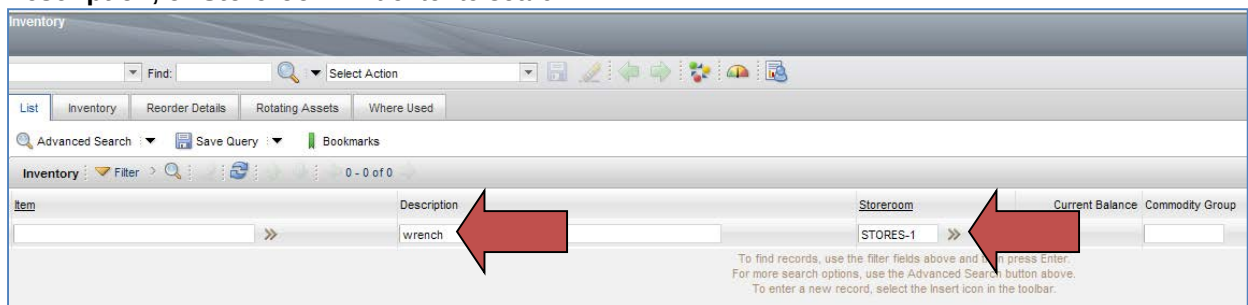


Enter the **inventory Item number** in the **Item** field. If you do not know the item number, you may search for it by clicking on the  icon to the right of the Item field. Hover your mouse over the **Go To** field and select **Inventory**.



The screenshot shows the 'Materials' tab in the Maximo interface. The 'Item' field has a red arrow pointing to the 'Go To' icon. A dropdown menu is open, showing options: 'Select Value', 'Classification', 'Attributes', 'Go To', 'View Item Availability', and 'View Image'. A red arrow points to the 'Go To' option. Another red arrow points to the 'Inventory' option in the 'Go To' dropdown.

You will be taken to the **Inventory** application where you can search for by **Item Number**, **Description**, or **Storeroom**. Hit enter to search.



The screenshot shows the 'Inventory' application. The 'Description' field contains 'wrench' and the 'Storeroom' field contains 'STORES-1'. Red arrows point to these fields. The table below shows the search results.

Item	Description	Storeroom	Current Balance	Commodity Group
	wrench	STORES-1		

To find records, use the filter fields above and then press Enter.
For more search options, use the Advanced Search button above.
To enter a new record, select the Insert icon in the toolbar.



The search will return a set of results. Click on the item number you are interested in.

Item	Description	Storeroom	Current Balance	Commodity Group
3408400314	WRENCH FOR SPRINKLER HEADS W- TYPE 9	STORES-10	7.00	34000
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-1	5.00	44500
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-10	84.00	44500
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-10S1	1,000.00	44500
4459170600	WRENCH, LOOSE KEY SOCKET 4 WAY	STORES-1S1	1,000.00	44500

Review the **Current Balance/Availability** and click on the **Return With Value** to select this item.

Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9

Storeroom: STORES-10 Storeroom for Area 10

Lot Type: ISOLOT

Issue Cost Type: AVERAGE

Receipt Tolerance %:

Status: ACTIVE

Default Bin: DEF01

Default Stage Bin:

Capitalized?

KIT?

Attachments

* Issue Unit: EA

Condition Enabled?

Rotating?

Consignment?

Requires hard reservation on use?

Available Balance Summary

Current Balance:	7.00
Hard Reserved Quantity Not Staged:	0.00
Hard Reserved Quantity Staged:	0.00
Total Quantity Staged:	0.00
Expired Quantity in Stock:	0.00
Quantity Available:	7.00

Other Balance Summary Information

Quantity Currently Reserved:	0.00
Hard Reserved Quantity:	0.00
Soft Reserved Quantity:	0.00
Quantity Staged:	0.00
Quantity in Holding Location:	0.00

ABC Analysis

ABC Type:

* Count Frequency: 9

Issue History

Last Issue Date:	
Year to Date:	0.00
Last Year:	0.00
2 Years Ago:	0.00
3 Years Ago:	0.00

The value will be returned back to your **Item** field in the **Materials** tab.

Labor **Materials** Services Tools

Materials: Filter > 1 - 1 of 1

Task	Mat Cat	Line Type	Craft	Item	Description
	MA	ITEM		3408400314	WRENCH FOR SPRINKLER HEADS W- TYPE 9

Task:

* Material Category: MA

* Line Type: Item

* Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9

* Quantity: 1.00

* Storeroom: STORES-10

* Craft:

Direct Issue?

Order Unit:

Indirect Rate: 1.000

Burden Unit Cost: 10.00

Burden Line Cost: 10.00

Avg Cost: 10.00

Enter the **Quantity** needed (auto-populates with 1)

Task:

* Material Category: MA

* Line Type: Item

* Item: 3408400314 WRENCH FOR SPRINKLER HEADS W- TYPE 9

* Quantity: 1.00

Direct Issue?

Order Unit:

Indirect Rate: 1.000

Burden Unit Cost: 10.00



Confirm the **Storeroom** name. You may change the Storeroom value if you wish to order from a different M&O Storeroom. It is important to check the balance or quantity available in the chosen Storeroom, so as not to create a negative inventory balance.

The screenshot shows the 'Materials' tab in the Maximo interface. The 'Task' field is empty, 'Mat Cat' is 'MA', 'Line Type' is 'ITEM', and 'Item' is '3408400314'. The 'Description' is 'WRENCH FOR SPRINKLER HEADS W- TYPE 9'. The 'Quantity' is '1.00'. The 'Storeroom' field is 'STORES-10', which is highlighted with a red arrow. The 'Craft' field is empty. On the right, there are fields for 'Direct Issue?' (unchecked), 'Order Unit' (empty), 'Indirect Rate' (1.000), 'Burden Unit Cost' (10.00), 'Burden Line Cost' (10.00), and 'Avg Cost' (10.00).

Enter the **Craft** code that is requesting the material. For example, **AA** for Carpentry.

The screenshot shows the 'Materials' tab in the Maximo interface. The 'Task' field is empty, 'Mat Cat' is 'MA', 'Line Type' is 'ITEM', and 'Item' is '3408400314'. The 'Description' is 'WRENCH FOR SPRINKLER HEADS W- TYPE 9'. The 'Quantity' is '1.00'. The 'Storeroom' field is 'STORES-10'. The 'Craft' field is 'AA', which is highlighted with a red arrow. On the right, there are fields for 'Direct Issue?' (unchecked), 'Order Unit' (empty), 'Indirect Rate' (1.000), 'Burden Unit Cost' (10.00), 'Burden Line Cost' (10.00), and 'Avg Cost' (10.00).

Review your entry. You may order additional material by clicking on the **New Row** button or the icon to save the record.

The screenshot shows the 'Work Order Tracking' interface. The 'Find' field is empty, and the 'Select Action' dropdown is set to 'New Row', which is highlighted with a red arrow. The 'List' tab is selected, showing a table with columns: List, Work Order, Plans, WO Details, Assignments, Related Records, Actuals, Safety Plan, Log, Failure Reporting, and Specifications. The table contains one row: Work Order: 14183033, * Falling ceiling tiles in Main building, classroom 1. The 'Parent WO' field is empty, and the 'Status' is 'APPR'.

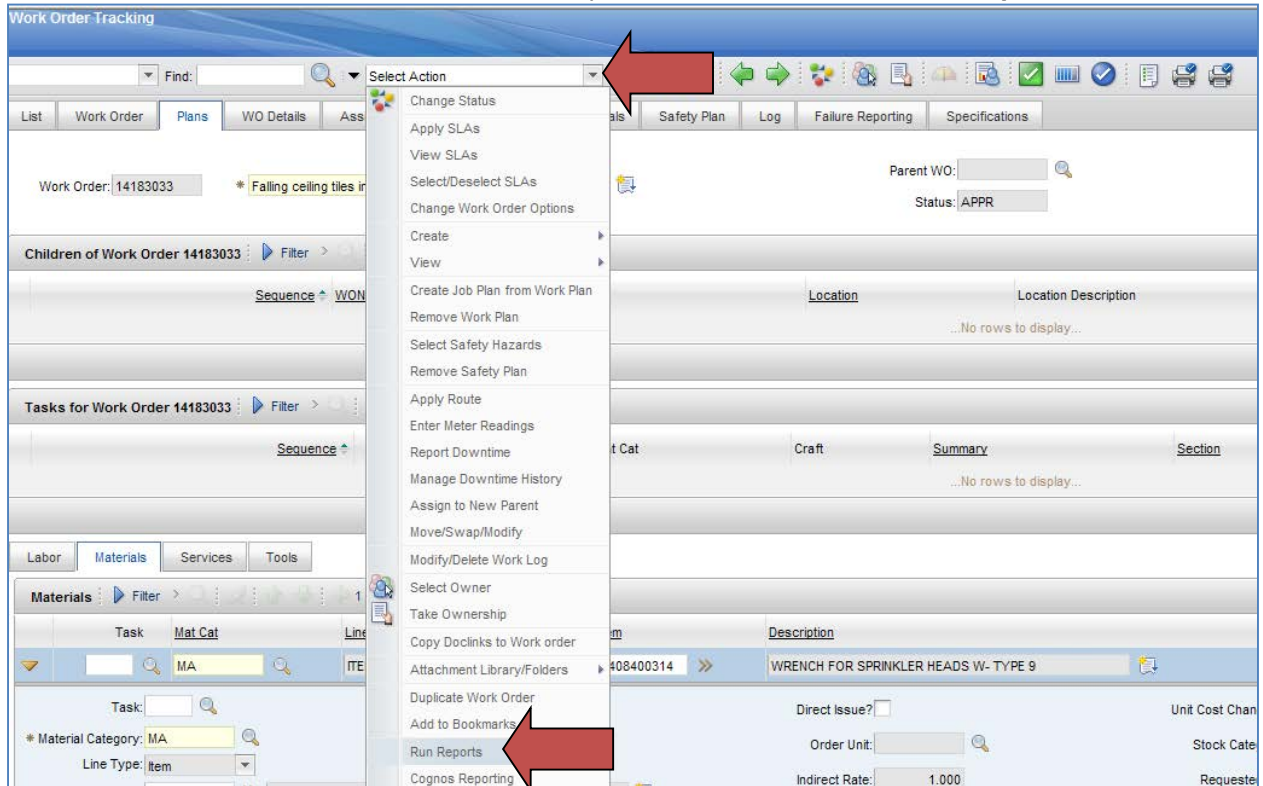
Note: If the work order status is **APPR** or above, the item is automatically reserved from the M&O Storeroom.



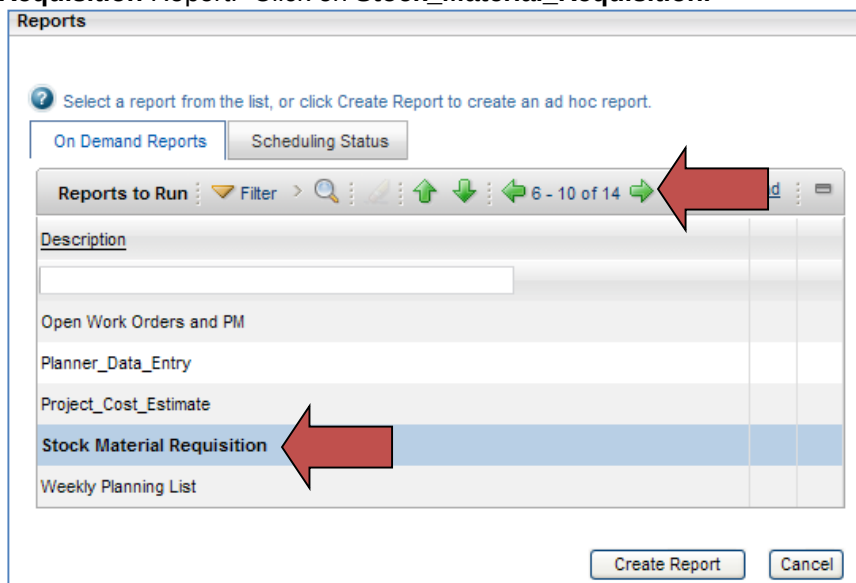
4. PRINT/SUBMIT STOCK MATERIAL REQUISITION REPORT TO HEAD STOCK CLERK

The requestor performs this function.

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



A **Reports** window will appear. Click on the next arrow  until you find the **Stock Material Requisition Report**. Click on **Stock_Material_Requisition**.





A **Request** Page will appear. Follow the on screen instructions. Required fields are marked with an asterisk *. Click on the **Submit** button when done.

Request Page

Help Text

Parameters

* Choose Report: Enter 1 for Stock Material Request, 2 for Stock Material Return:

For Stock Material Return report only: enter date to show only matl trans then:

* Enter applicable storeroom:

Show lines for the following craft code only:

* Authorized By Labor Code (required):

Show matl for these tasks only (separate multiple values with comma):

* Issued to Labor Code:

Enter comments/instructions:

Schedule

☒ Immediate

☐ At this Time

☐ Recurring

Email

To:

Subject:

Comments:

File Type: ☒ PDF

Report Delivery Format: ☒ Email with a file attachment

Submit



A new **BIRT Report Viewer** window will appear. Review the report for accuracy and print the report by clicking on the printer icon. The report will be exported into a PDF file where you can begin the print.

Reporting
Page 1 of 1

Los Angeles Unified School District

*Existing Facilities
Maintenance & Operations*

Stock Material Requisition

Parameters Entered:	Storeroom:	 * S T O R E S - 1 *	Actual material issues and returns with transaction date of:
Authorized By Labor Code: 783929		Printed By:	
Material Line Craft:		Task IDs:	
W.O. Number: 24888155 * 2 4 8 8 8 1 5 5 *	GL Account: CC: 0001646601-11731	School: SAN GABRIEL EL	School Code: 6466
		Lead Craft Code: AA	Reserved Date: 8/4/14
Authorized By (Print / Sign): Peterson, Richard D., 783929		Area/Region: M&O BRANCH	Issued To: Hawkins, Rudy 563706
Report Date and Time: Aug 1, 2014 8:27 AM			
Comments:			

Task ID	Plan Matl Craft	Cat.	Stock Number	Reserved Qty	Issued Qty	Unit	Material	Bin Loc.	Avg Unit Cost	Ext Cost
Total Cost of Issued Items:										

No reserved items found based on the criteria provided

Received By Emp #: _____

Printed Name: _____

Signature: _____

Received Date: _____

Delivered To (if applicable): _____

Printed Name: _____

Signature: _____

Received Date: _____

Requestor to obtain the **Authorized By** Signature and submit the report to the **Head Stock Clerk** for review and issuance of the material.

Head Stock Clerk or designee who issues the material is required to fill in the **Issued By** fields and the receiver to fill in the **Received By** fields. If the Receiver delivers the materials to a different individual, that individual will fill in the **Delivered To** fields.