Post Date: 8/17/15

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

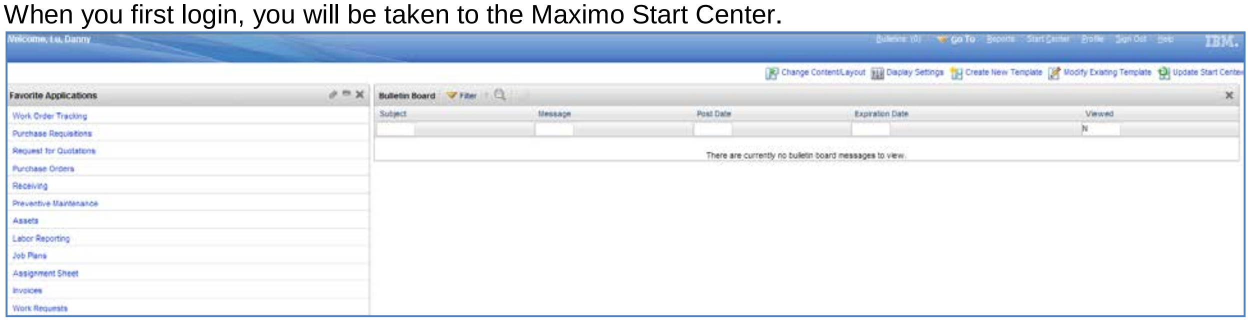
The requestor performs this function.

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.

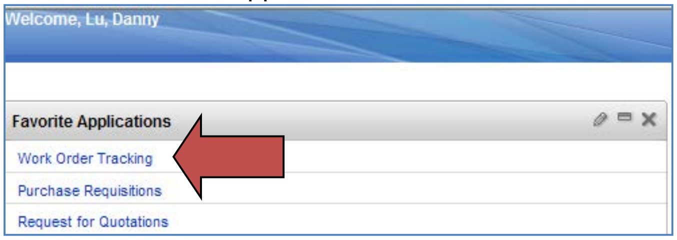
START CENTER

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.

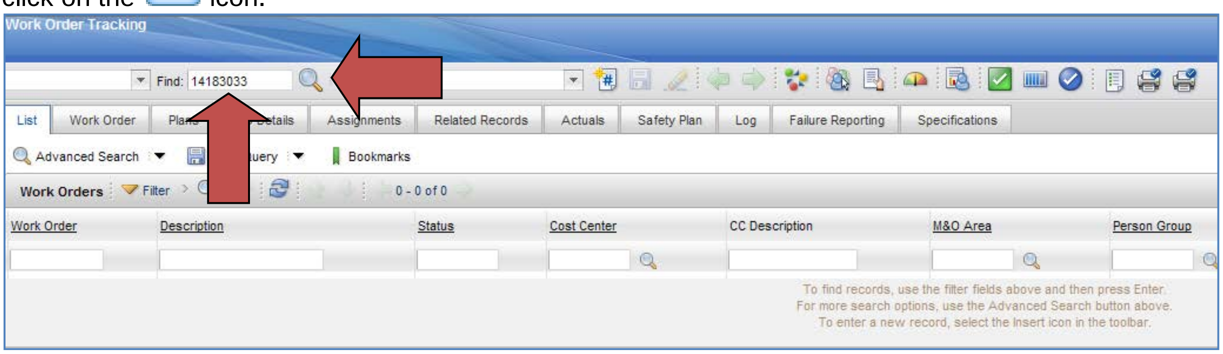


WORK ORDER TRACKING HOME

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. GO TO WORK ORDER

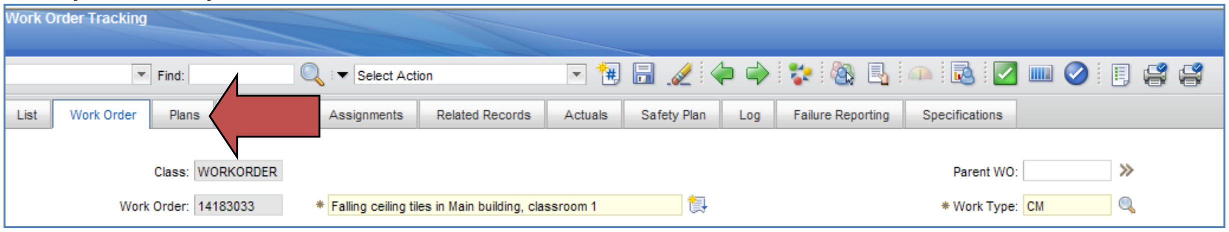
If you know your work order number, you can type in the work order number in the **Find:** field and click on the  icon.



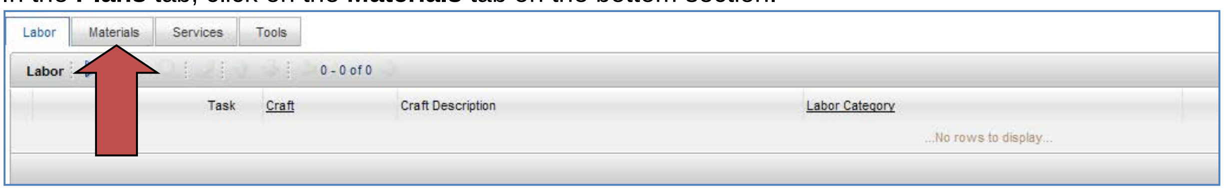
If you do not know your work order number, you can search for the work order through your Saved Queries list or by running a new search. For more information on how to search for work orders, please see the **Query Management Guide**.

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

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



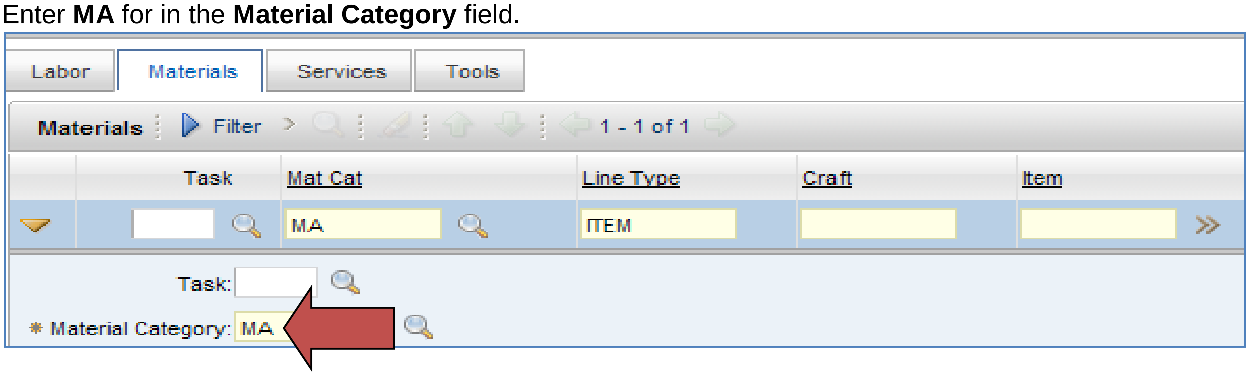
In the **Plans** tab, click on the **Materials** tab on the bottom section.



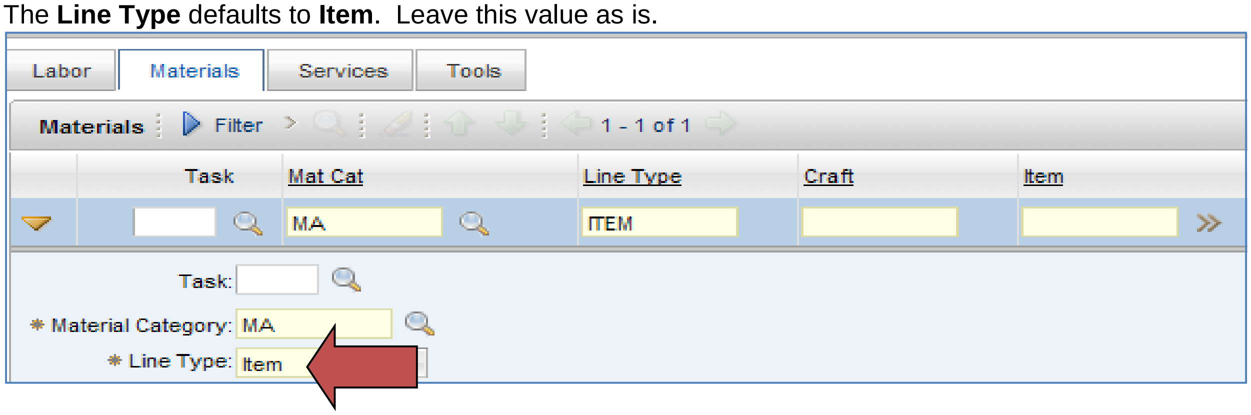
Click on the **New Row** button.

<u>Fill out the following fields</u>

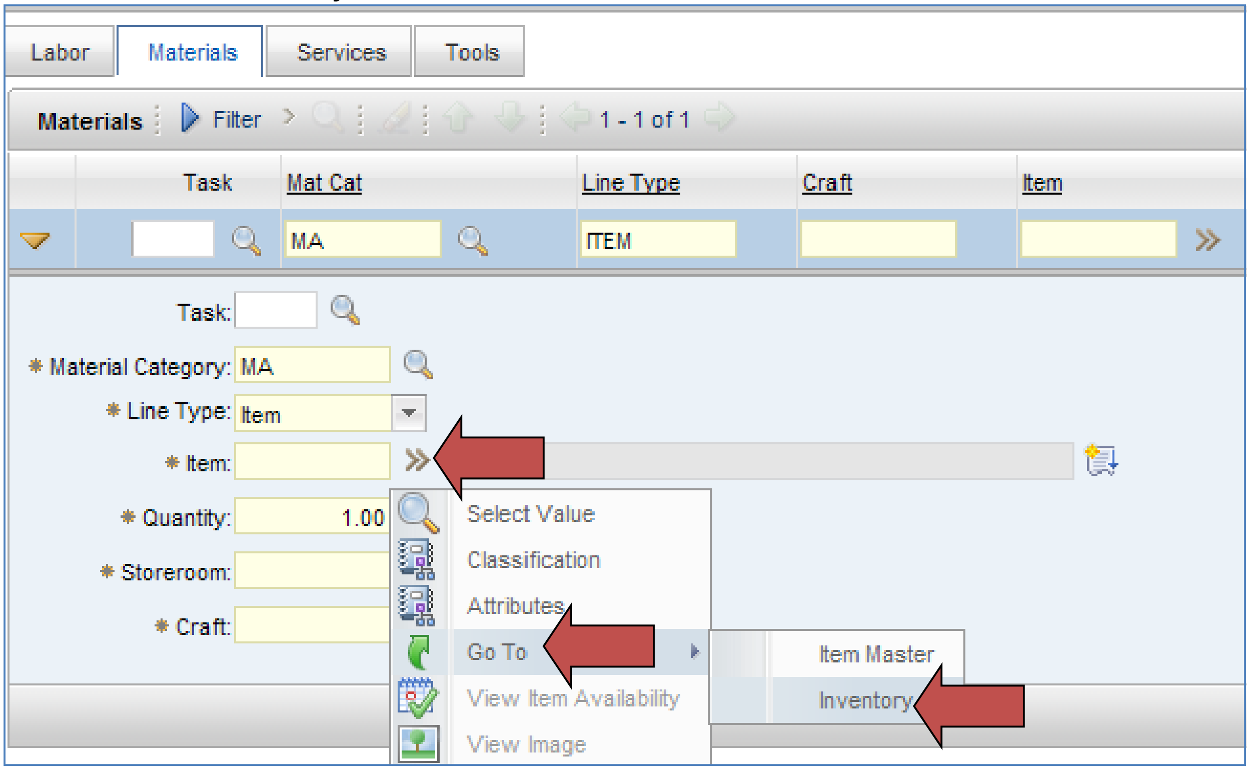
Enter **MA** for in the **Material Category** field.



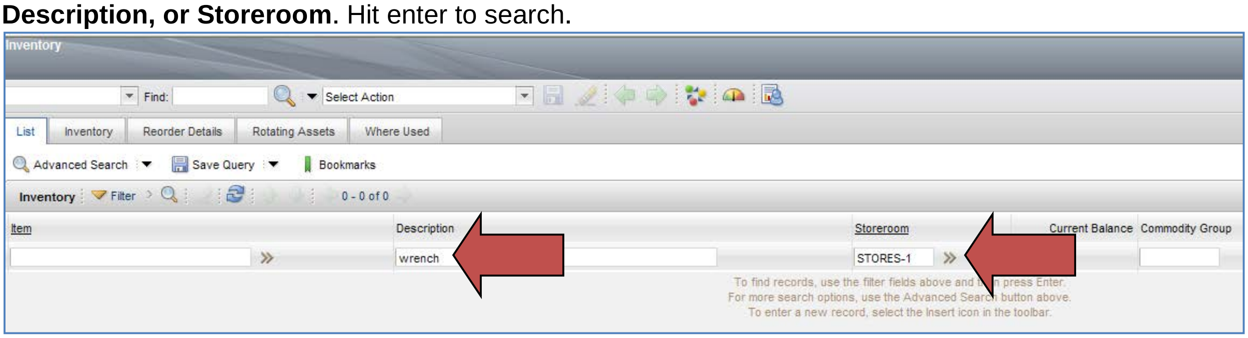
The **Line Type** defaults to **Item**. Leave this value as is.



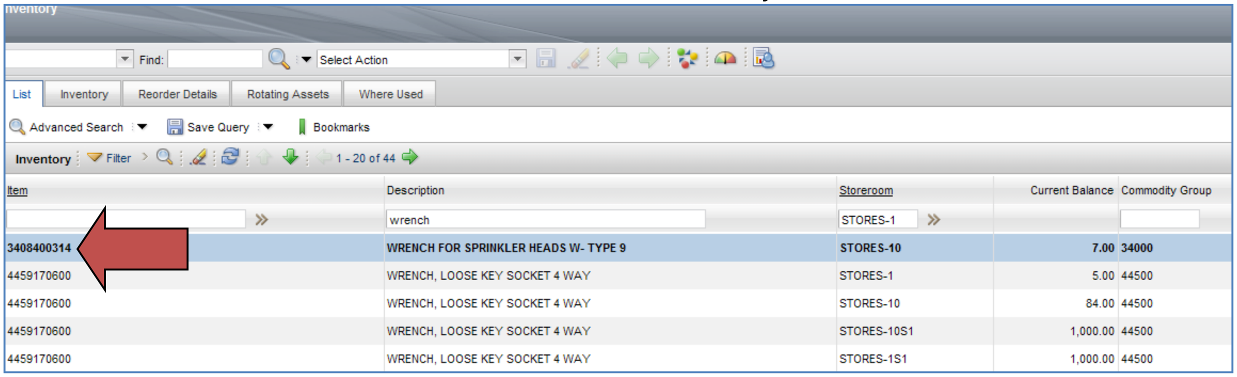
Enter the **inventory Item number** in the **Item** field. If you do not know the item number, you may search for it by clicking on the  icon to the right of the Item field. Hover your mouse over the **Go To** field and select **Inventory**.



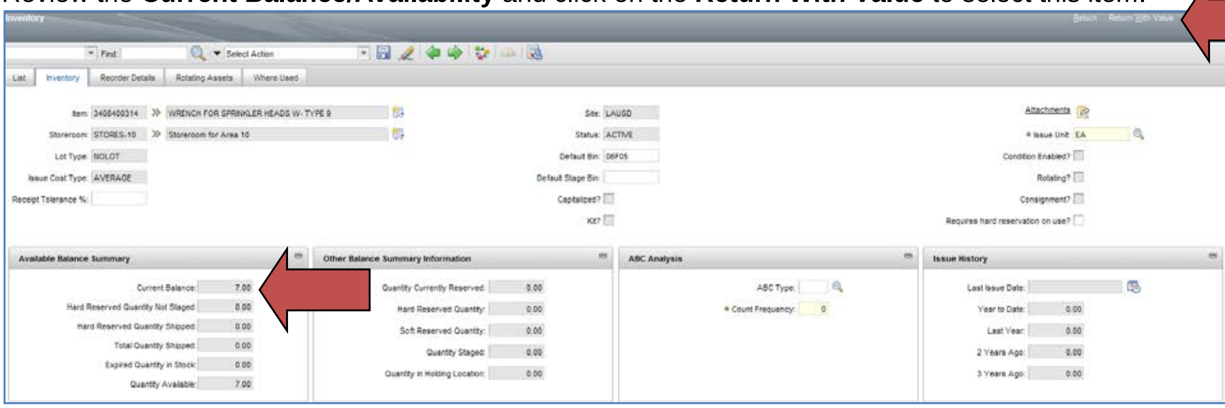
You will be taken to the **Inventory** application where you can search for by **Item Number, Description, or Storeroom**. Hit enter to search.



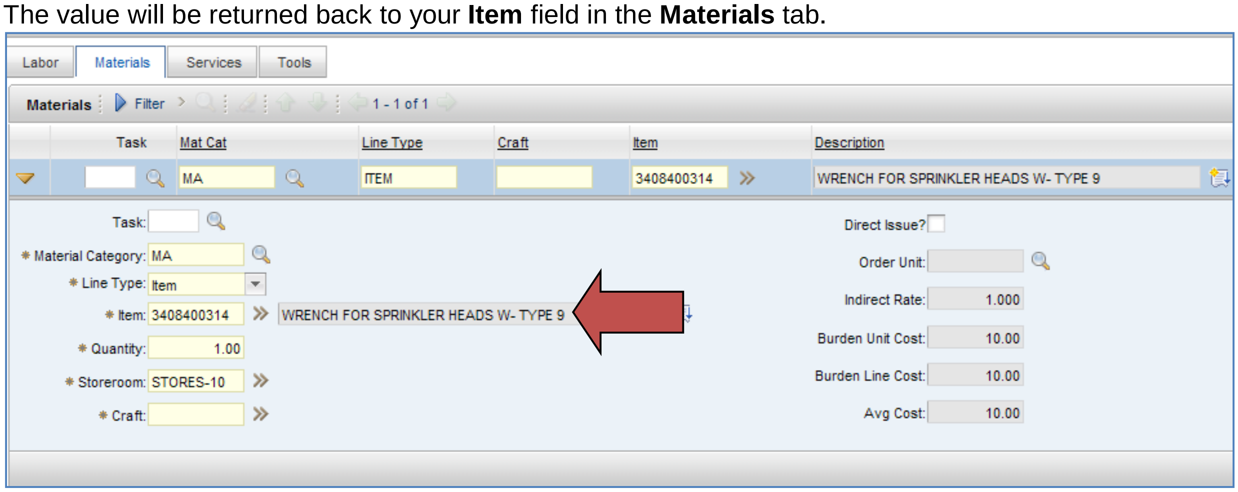
The search will return a set of results. Click on the item number you are interested in.



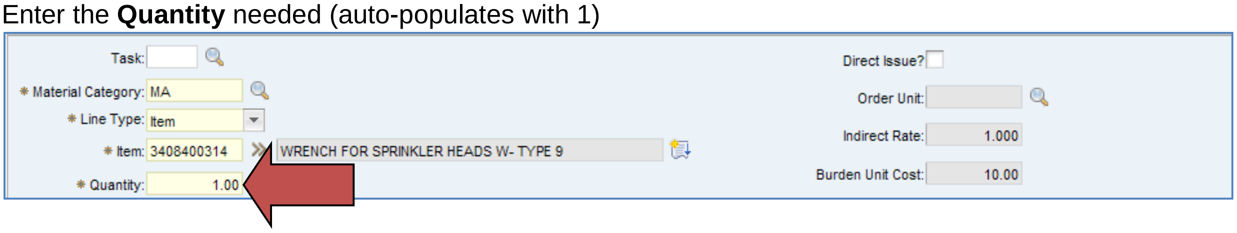
Review the **Current Balance/Availability** and click on the **Return With Value** to select this item.



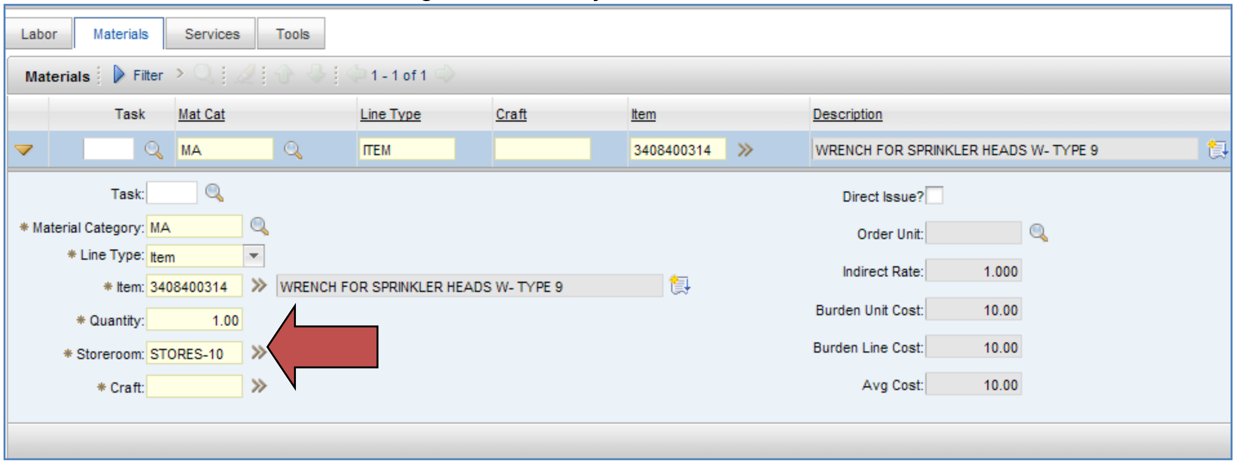
The value will be returned back to your **Item** field in the **Materials** tab.



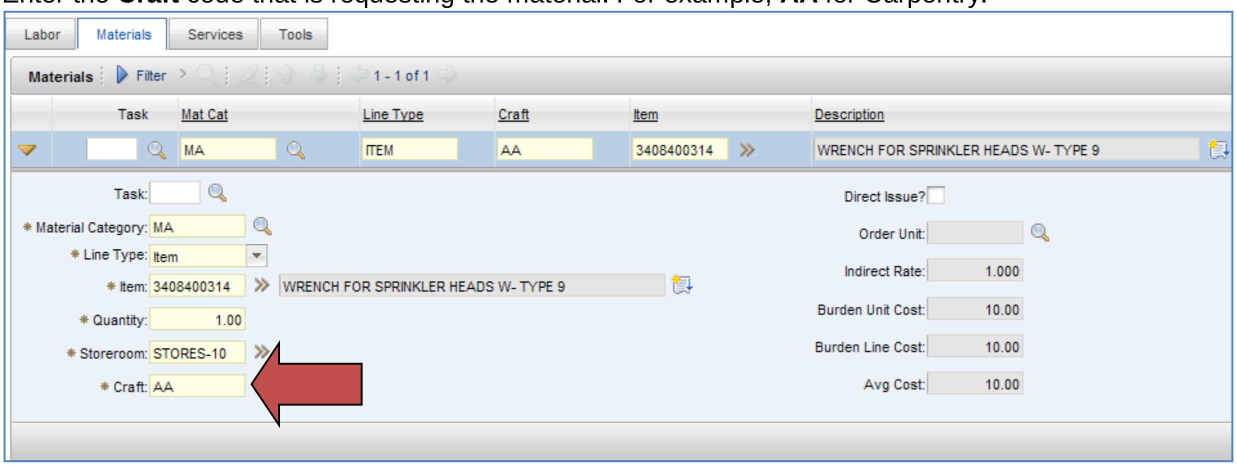
Enter the **Quantity** needed (auto-populates with 1)



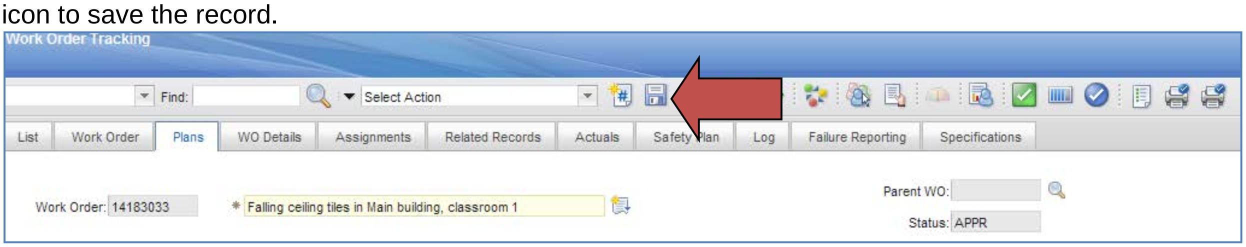
Confirm the **Storeroom** name. You may change the Storeroom value if you wish to order from a different M&O Storeroom. It is important to check the balance or quantity available in the chosen Storeroom, so as not to create a negative inventory balance.



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



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

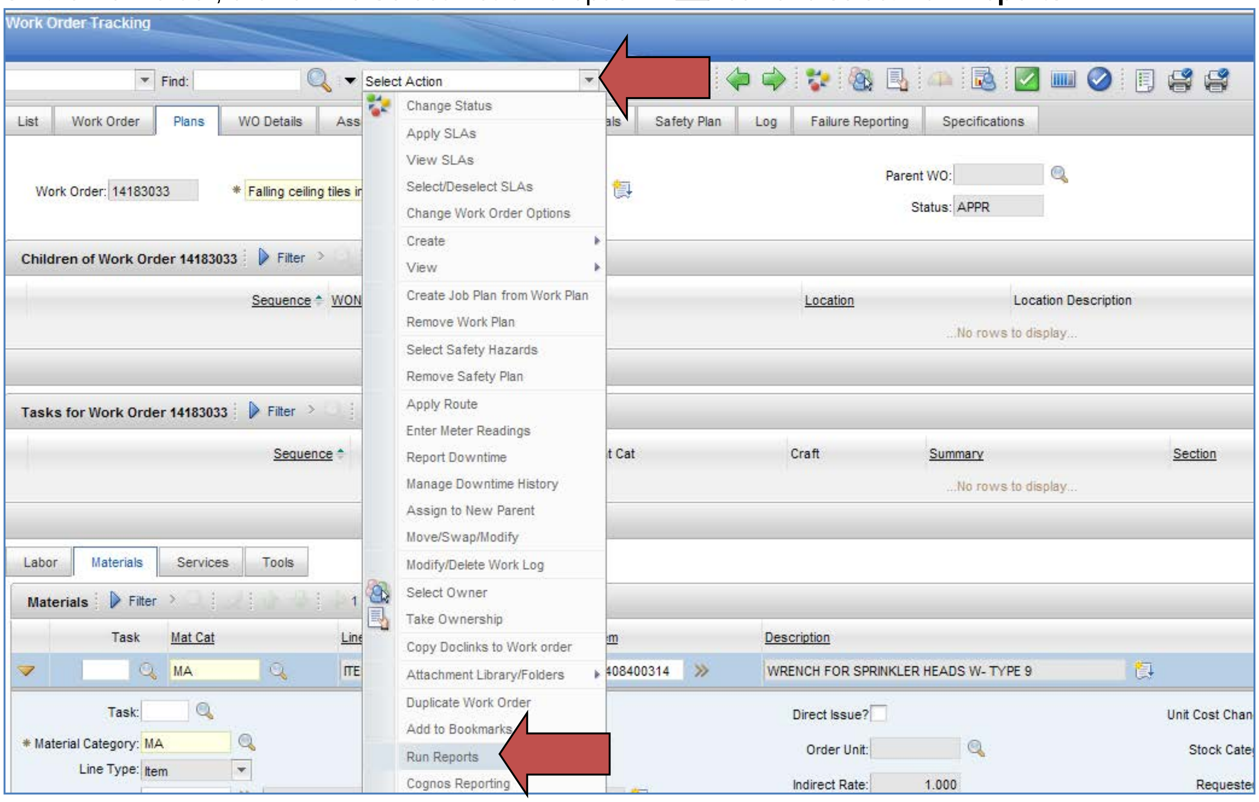


Note: If the work order status is **APPR** or above, the item is automatically reserved from the M&O Storeroom.

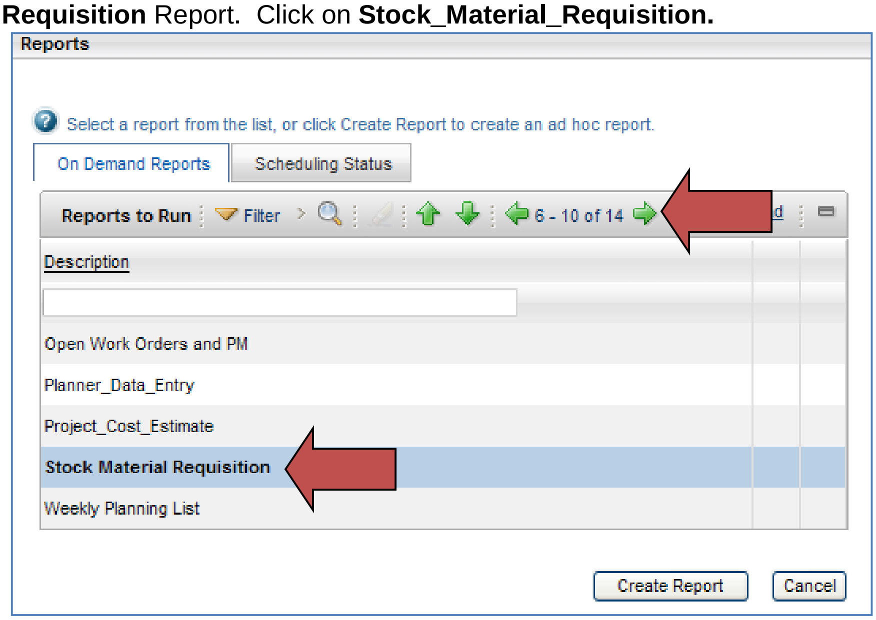
4. PRINT/SUBMIT STOCK MATERIAL REQUISITION REPORT TO HEAD STOCK CLERK

The requestor performs this function.

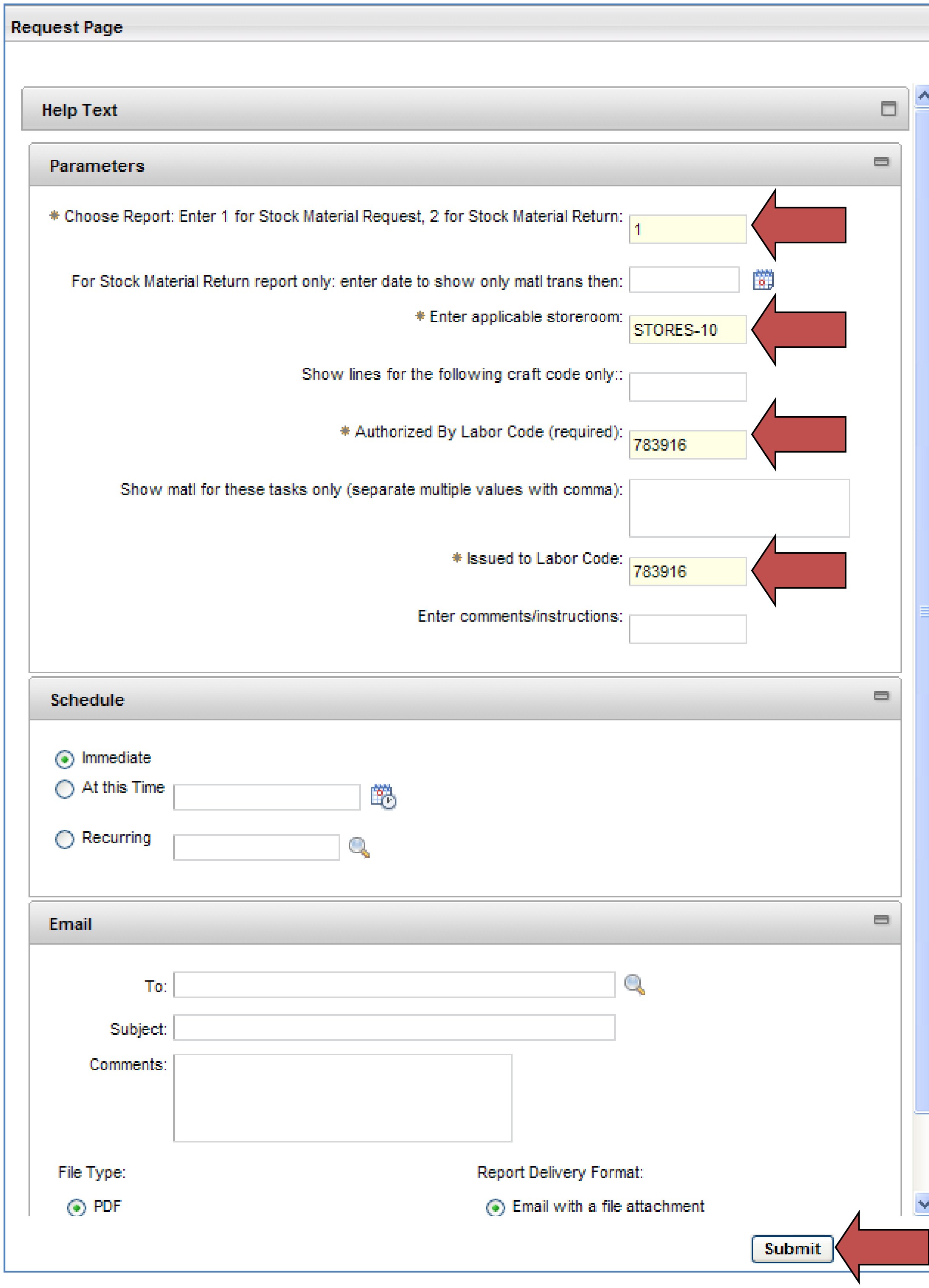
On the work order, click on the **Select Action** dropdown icon and select **Run Reports**.



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: 1

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

* Enter applicable storeroom: STORES-10

Show lines for the following craft code only::

* Authorized By Labor Code (required): 783916

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

* Issued to Labor Code: 783916

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

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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:	GL Account:	School:	School Code:	Lead Craft Code:	Reserved Date:
24888155 * 2 4 8 8 8 1 5 5 *	CC: 0001646601-11731	SAN GABRIEL EL	6466	AA	8/4/14

Authorized By (Print / Sign):	Area/Region:	Issued To:	Report Date and Time:
Peterson, Richard D., 783929	M&O BRANCH	Hawkins, Rudy 563706	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

Date Filled ____________________
Issued By Name: ____________________
Signature: ____________________

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.