



Los Angeles Unified School District
Maximo 101 Training
Handouts & Exercises



Agenda

- I. (7:30-7:45am)** – Introductions / Roll call
- II. (7:45-8:00am)** – Facilities Website Resources
 - FTS Helpdesk (<http://vjer.lausd.net>)
 - Facilities Services Division Website (<http://www.laschools.org>)
- III. (8:00-8:15am)** – Basic Maximo Navigation, Modules, Applications, Favorites Applications List
- IV. (8:15-9:00am)** – How to create a Service Call (Hands on exercise)
 - Work Request Application
 - Work Order Tracking Application
- V. (9:00-9:30am)** – Work Order Tracking Overview
 - Types of Work Orders (Service Calls, Planned Jobs, PM, Overhead, Standing)
 - Work Order Fields
 - Run Reports
- VI. (9:30-9:45am)** – Break
- VII. (9:45-10:15am)** – How to create a Query and Bookmark a work order(s) (Hands on exercise)
- VIII. (10:15-10:45am)** – How to Report Time and run associated Reports (Hands on exercise)
- IX. (10:45-11:15am)** – Work Force Manager Preview
- X. (11:15-11:30am)** – Open Forum (Questions and Answers)



II. Facilities Website Resources

FTS Helpdesk (<http://vjer.lausd.net>)



1. Remote Access Assistance

Click on "Facilities Remote Help Desk"

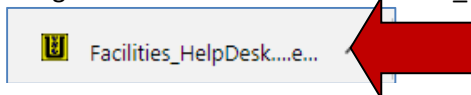


Depending on the browser you are using, you need to "open/run" the application.

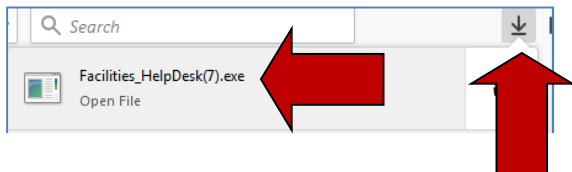
Internet Explorer: Click on "Run" button



Google Chrome: Click on the "Facilities_Helpdesk"

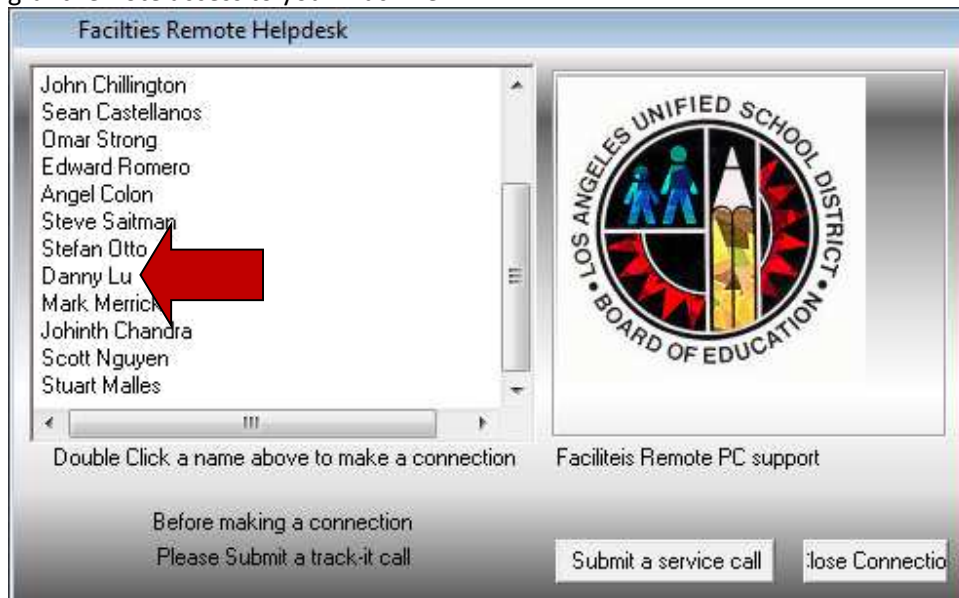


Firefox: Click on the download arrow button and click "Facilities_Helpdesk"



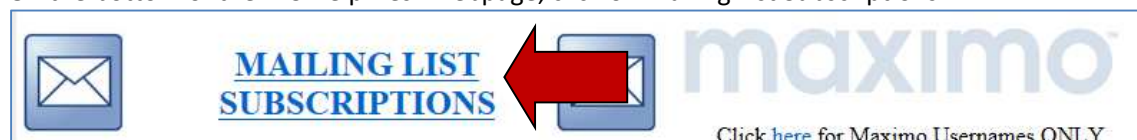


A Facilities Remote Helpdesk window will appear. Double click on the name of the individual who you want to grant remote access to your machine.

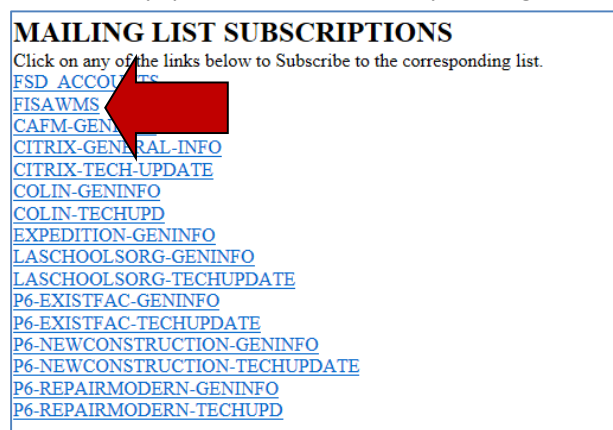


2. Subscribe/Unsubscribe to Maximo email distribution list

On the bottom of the FTS Help Desk webpage, click on Mailing List Subscriptions.

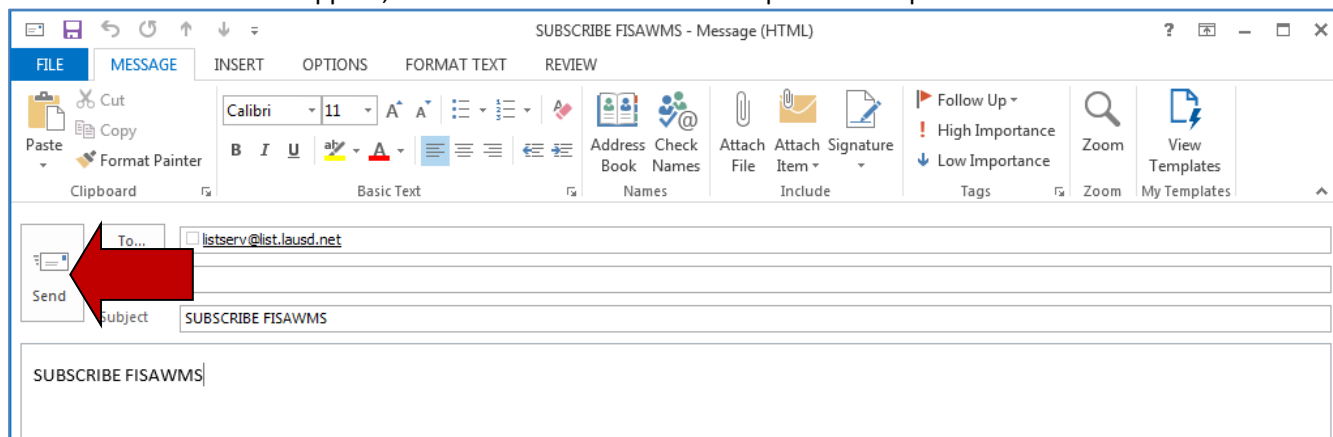


To subscribe to the Maximo email distribution list, click on 'FISAWMS' under the Mailing List Subscriptions. Alternatively, you can unsubscribe by clicking on the 'FISAWMS' under the Unsubscribe From A Mailing List.





A new email window will appear, click on the Send button to complete the request.

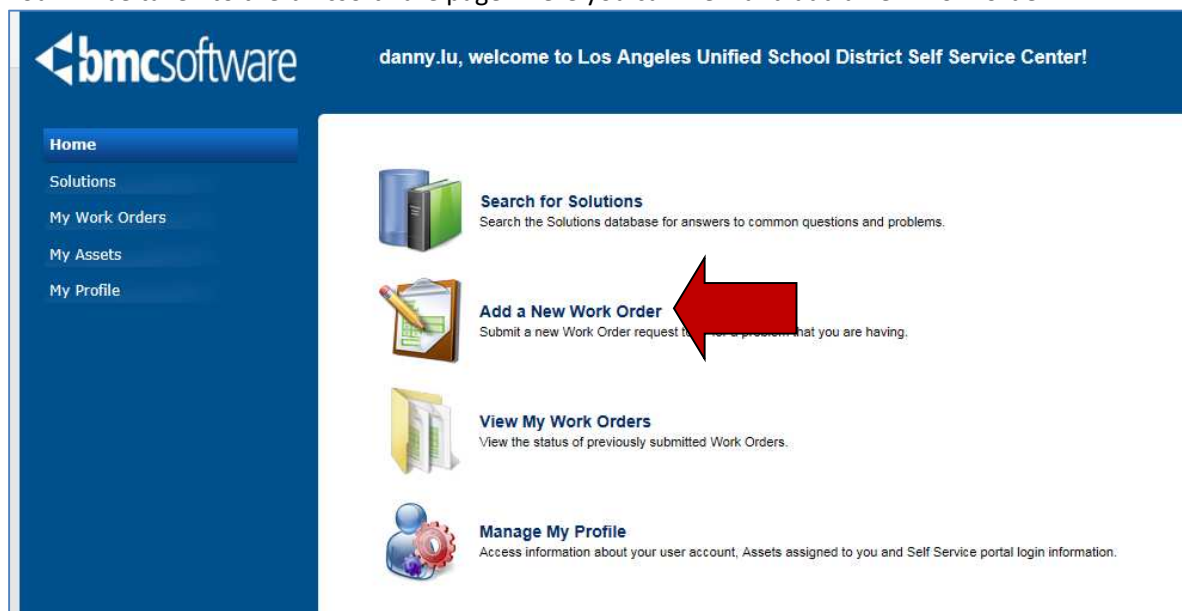


3. Create a Facilities Technology Services (FTS) Service Ticket (TRACKIT)

Click on the Track-It! Banner on the top right corner of the page.



You will be taken to the bmcsoftware page. Here you can view and add a new work order.





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Facilities Services Division Website (<http://www.laschools.org>)

[FSD Home](#) [LAUSD.net](#) [Board of Education](#) [Bond Oversight](#) [Site Map](#) [Login](#) | [Register](#)



Facilities Services Division

Los Angeles Unified School District

All Youth Achieving

[FSD Home](#) | [LAUSD.net](#)



[Community Relations](#) [About My School](#) [Facilities Initiatives](#) [Facilities Branches](#) [Business With FSD](#) [My FSD](#)

Maintenance & Operations Page

Click on the Facilities Branches header and select Maintenance & Operations



[Community Relations](#) [About My School](#) [Facilities Initiatives](#) [Facilities Branches](#) [Business With FSD](#) [My FSD](#)

Facilities Services Division

The Facilities Services Division is responsible for the

[Asset Management](#)
[Maintenance & Operations](#)
[Program Support Services](#)
[Project Execution](#)

[Gallery](#)

[2018 Local Hazard Mitigation Plan](#)

Facilities Branches | Maintenance and Operations

Asset Management

Maintenance & Operations

- [About Us](#)
- [Organizational Chart](#)
- [Maintenance Services](#)
- [Operations Services](#)
- [Design Department](#)
- [School Improvement Program](#)
- [Sustainability Initiatives](#)
- [Inspection](#)
- [Contact Us](#)
- [Quick Links](#)
- [Program Support Services](#)
- [Project Execution](#)
- [Facilities Contracts](#)

Welcome to the Maintenance and Operations web site!

Here you can find useful information about the services we provide, critical contacts for school staff, a guide for community projects and the Principal's Corner, where data on service calls and energy usage can be found.

I hope your visit is informative and I encourage you to use the Customer Satisfaction Survey or the Contact Us tab on these pages to tell us how we are doing or give us suggestions on what we can do better.

Your M&O team of professionals is committed to providing you with exceptional service and we thank you for visiting.

Sincerely,

Roger Finstad
Director of Maintenance and Operations

Quick Links

- [M & O SharePoint](#)
- [Maximo and IT Application User Guides](#)
- [Bid Walk Registration](#)
- [COLIN Application](#)
- [Complex Project Managers](#)
- [Customer Satisfaction Survey](#)
- [Construction Bidder's Handbook](#)
- [Drinking Water Quality Program](#)
- [Forums](#)
- [Frequently Asked Questions](#)
- [LAUSD Site Portal](#)
- [Mobile Apps](#)
- [Maintenance Material Advertisement](#)
- [M & O Annual Contracts and Task Orders](#)
- [M & O Service Requests](#)
- [M & O Work Order Status](#)
- [Principal's Corner](#)
- [Reporting Graffiti](#)
- [Strategic Initiatives Group](#)



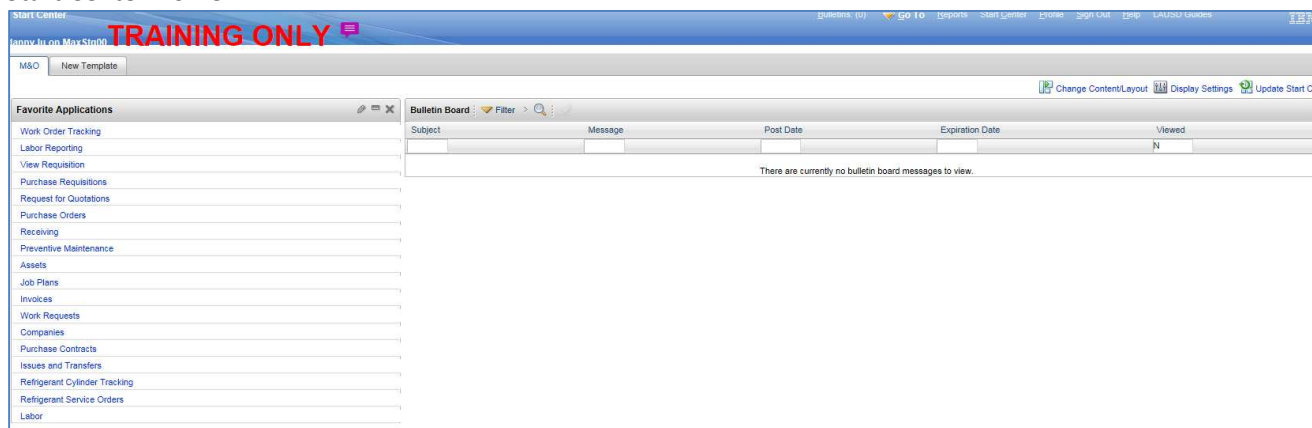
III. Basic Maximo Navigation, Modules, Applications, Favorite Applications List

Maximo Training URLs:

<http://fac-max-stg00.lausd.net/maximo>

<http://fac-max-stg01.lausd.net/maximo>

Start Center Home



1. How to report Maximo performance issues.

Click on the message icon on the top right corner of the header.



A new window will appear titled, “**Report Maximo Performance Issues.**” Select the appropriate Severity and a detailed description of the issue under Comments. Click Submit when ready.

Report Maximo Performance Issues

Severity:

Comments:



2. How to add/remove applications on my Favorite Applications list.

Click on the **pencil** icon on the top right corner of the Favorite Applications.

Favorite 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	
Issues and Transfers	
Refrigerant Cylinder Tracking	
Refrigerant Service Orders	
Labor	

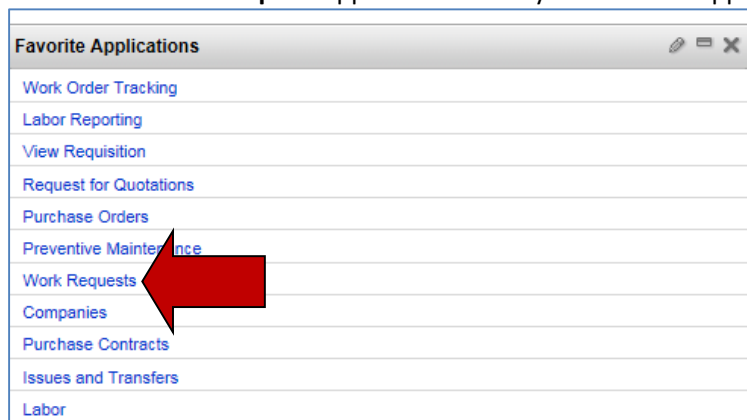
You will be taken to the **Favorite Applications Setup** page. Here you can delete, re-order and add new applications to your list.

Portlet: Favorite Applications		Display Name: Favorite Applications	
Applications: Filter > 1 - 15 of 18		Download	
Application	Description	Order	
LABOR	Labor		
FREONUSAGE	Refrigerant Service Orders		
FREONJUGMG	Refrigerant Cylinder Tracking		
CONTPURCH	Purchase Contracts	16	
ASSET	Assets	8	
VIEWDR	View Requisition	3	
INVOICE	Invoices	12	
WOTRACK	Work Order Tracking	1	
RFQ	Request for Quotations	4	
RECEIPTS	Receiving	5	
PR	Purchase Requisitions	4	
PO	Purchase Orders	5	
PM	Preventive Maintenance	7	
LABREP	Labor Reporting	2	
JOBPLAN	Job Plans	10	
		Finished Cancel Select Applications	



IV. Exercise #1 – Creating a Service Call (Work Request Application)

Click on the **Work Request** application under your Favorite Applications List.



Click on the **New Work Order** icon.



Complete the fields as listed below.

- **Cost Center:** 0001865001
- **Location:** B-17155
- **Requestor Name:** Your First and Last Name
- **Requestor Title:** Your Title
- **Work Description:** Toilet seat broken in boys restroom, first stall
- **Category:** PLUMBING
- **Routing Code:** MO-GA-16
- **Agency:** Leave Blank
- **Agency ID:** Leave Blank
- **WO Priority:** 3
- **Tracking Code:** SR
- **Asset:** Leave Blank
- **Additional Comments:** Leave Blank
- **Potential Warranty Checkbox:** Leave Blank



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Sample Screenshot

Find: [] Select Action [] [] []

List Service Call / Work Request

Request #: 28508876 >> Location Phone #: 323-758-4141

Reported Date: 7/10/18 4:28 PM M&O Area: AREA-S1

* Costcenter: 0001865001 FREMONT SH Address: 7676 S SAN PEDRO ST

* Location: B-17155 AUDITORIUM BUILDING City: LOS ANGELES

Requestor Name: Danny Lu ZIP: 90003

Requestor Title: Senior Technical Project Manager

* Work Description: Toilet seat broken in boys restroom, first stall

* Category: PLUMBING

* Routing Code: MO-GA-16

* Person Group: S1-GA

Agency: []

Agency ID: []

* WO Priority: 3

* Work Type: CM

Tracking Code: SR

Asset: []

Reported By: Lu, Danny

Attachments []

Additional Comments: []

Status: WAPPR

Site Based(Y/N): N

Potential Warranty? []

Is Service Call? [x]

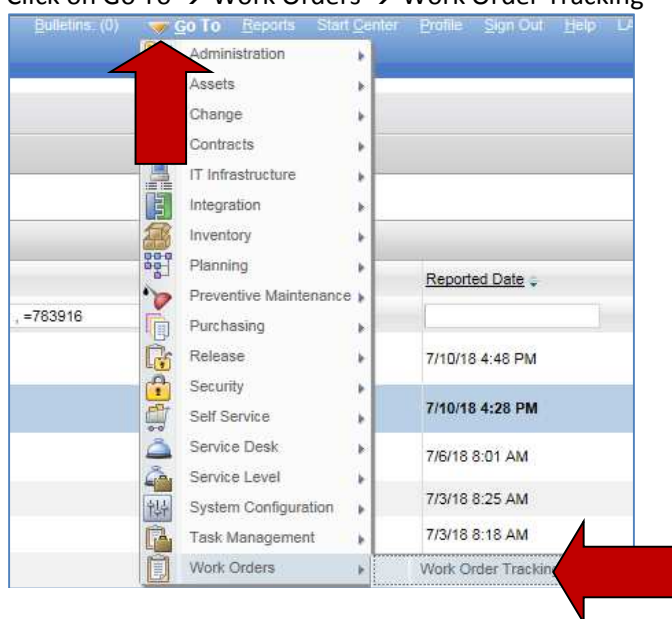
When you are finished filling in the fields, click on the **floppy disk** to save the record.

Congratulations! You have just created a service call work order.

Note: Hand write the work order number or “copy” the WO with your mouse.

IV: Exercise #2 – Search for the work order you just created in Work Order Tracking, Insert Job Type and Change Status to APPR.

Click on Go To → Work Orders → Work Order Tracking





Type in (or Paste) the work order number you just created in the **Find** field and click on the magnifying glass.

Enter **Job Type: 01** (Repair of Buildings)

Job Cat Code	Description	Mocat
01	Repair of Buildings	MAINT
02	Repair of Portable Equipment	MAINT
03	Replacement & Installation of Equipment	MAINT
04	Moving Equipment	MAINT
05	Inspection & Testing	MAINT
07	Vandalism - Maintenance	MAINT
09	Upkeep of Grounds/Playgrounds	MAINT
08	Fire Damage - Maintenance	MAINT

Change Status of Work Order to APPR (Approve)



A Change Status window will appear. Click OK to execute the status change.

The 'Change Status' window displays the following information:

- Work Order: 28508876
- Description: Toilet seat broken in boys restroom, first stall
- Status: WAPPR
- Description: Waiting on Approval (WAPPR)
- Memo: (empty text box)
- * New Status: **Approved (APPR)** (indicated by a red arrow)
- * Status Date: 7/10/18 5:12 PM
- Print Work Order(s)? ☐
- Change work order status in back ground? ☐
- Notification E-mail for Work Order Change Status: danny.lu@lausd.net
- OK button (indicated by a red arrow)

Congratulations! You have just entered a job type and approved a service call work order.

IV: Exercise #3 – Run WO Details Report

Click on the **Browser View: Work Order Details** icon.



Note: If pop-up blocker appears, click Always Allow Pop-ups for this site and try again.

Report will generate.

The report header includes the Los Angeles Unified School District logo, the text 'Existing Facilities Maintenance & Operations', and the title 'WORK ORDER DETAILS REPORT'.

W.O. # *28508876* **Toilet seat broken in boys restroom, first stall**

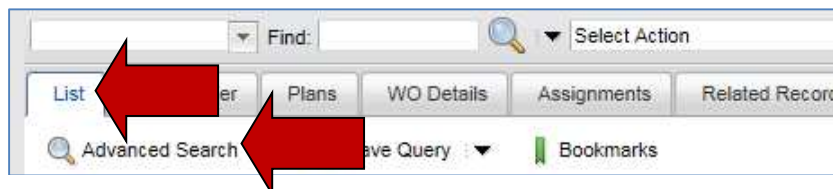
Job #:

Work Order Details			
Requestor Name: Danny Lu	Requestor Title: Senior Technical Project Manager	Reported Date: 7/10/18	
Respond By Date: 8/9/18	Status: APPR	W.O. Priority: 3	
Work Type: CM	Parent W.O. #:		
Agency ID:	Agency Name:	Agency Date:	

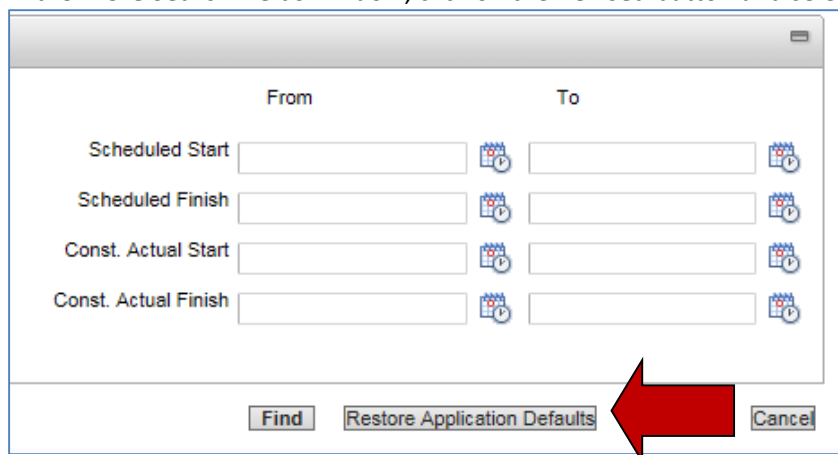


VII: Exercise #4 – Create/Save a Query

Click on the List tab → Advanced Search



In the **More Search Fields** window, click on the **Revised** button and select **Restore Application Defaults**.



Fill in the following fields as listed below:

- **Person Group:** =N1-AA
- **Status:** !=COMP
- **Service Call?:** =Y

More Search Fields| Current Query:

WONUM:	Failure Class:	M&O Area:
WO Description:	Problem Code:	Work Type:
Parent WO:	Originating Record:	Status: !=COMP
Cost Center:	Category Code:	Status Date:
CC Description:	Routing Code:	Agency:
Location:	Job Type:	Agency ID:
Location Description:	Lead Craft:	Priority:
Search Location Hierarchy:	PM:	Planning Priority:
Asset:	Source ID:	History?
Asset Description:	Requestor:	Is Task?
Person Group: =N1-AA	Service Contract:	Service Call? =Y

Click on the **Find** button when finish.



You will be taken to the List tab with the result.

List

Work Order

Plans

WO Details

Assignments

Related Records

Actuals

Safety Plan

Log

Deficiencies

Specifications

Advanced Search

Save Query

Bookmarks

Work Orders

Filter

</

Click **Save Query** button

List

Work Order

Plans

WO Details

Assignments

Related Records

Actuals

Safety Plan

Log

Deficiencies

Specifications

Advanced Search

Save Query

Bookmarks

Work Orders

Filter

1 - 20 of 938

Work Order	CC Description	Description	Status	Cost Center	M&O Area
			I=COMP		
28268717	PANORAMA SH	drywall repair@1st floor	INPRG	0001861001	AREA-N1
28157659	CANTARA EL	install blinds @teachers lounge	WMATL	0001276701	AREA-N1

Enter Query Name and Description as: **Open N1-AA Service Calls**. Press OK button to save.

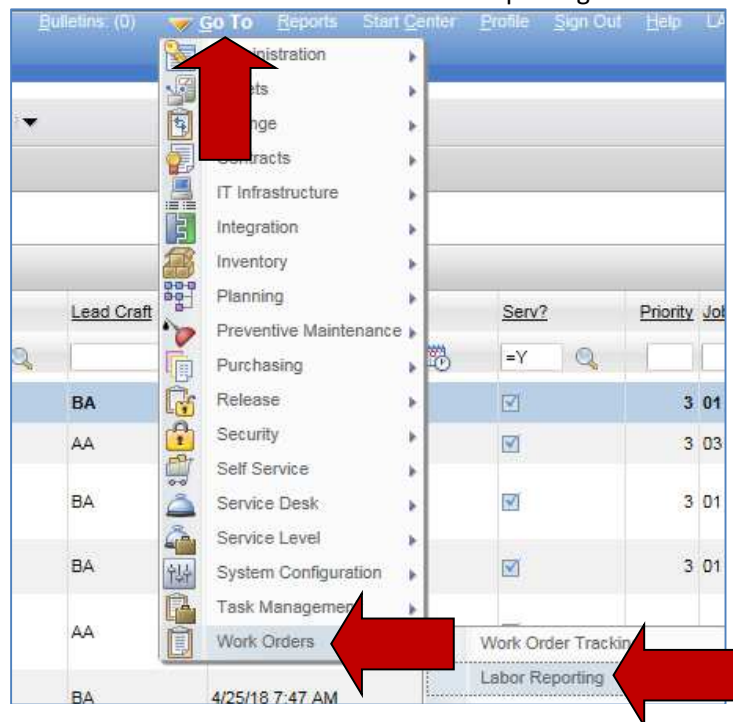
Save Current Query	
* Query Name: Open N1-AA Service Calls	* Open N1-AA Service Calls
Public? ☐	
Default? ☐	
OK	

Congratulations! You have just created and saved a query.

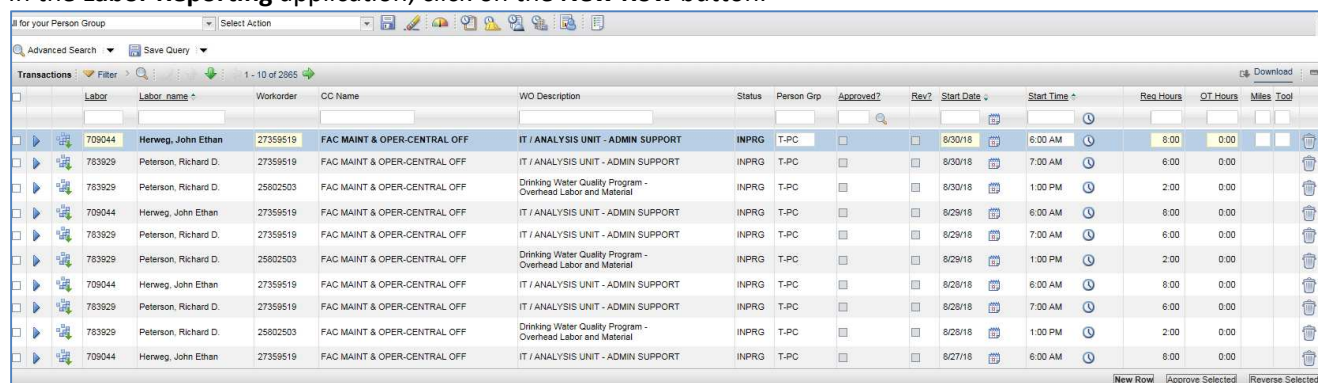


VIII. Exercise #5 – Report Time in Labor Reporting

Click on Go To → Work Orders → Labor Reporting



In the **Labor Reporting** application, click on the **New Row** button.



Complete the following fields as listed below:

- **Work Order:** Enter the work order number you created.
- **Labor:** Your employee number
- **Start Date:** 7/11/18
- **Start Time:** 7:00 AM
- **Regular Hours:** 4
- **Miles:** 10
- **Memo:** Roundtrip from home to Fremont SH.



Sample screenshot

The screenshot shows the 'Labor Transaction' form in Maximo. Red arrows point to the following fields:

- Start Date: 7/11/18
- Start Time: 7:00 AM
- End Time: 11:00 AM
- End Date: 7/11/18
- Regular Hours: 4.00
- OT Hours: 0.00
- Type: WORK
- Revision: 1
- Premium Rate Type: HOURLY
- Premium Pay Rate: 169.08
- Ref WO: 28508876
- Class Code: 1202
- WO Status: APPR
- Task: 1202
- Rate: 169.08
- Line Cost: 169.08

When finish, click on **floppy disk** icon to save.

Congratulations! You have just created a labor transaction.

VIII. Exercise #6 – Run Weekly Time Card Report

Click on the **Select Action** drop down and select **Run Reports**.

The screenshot shows the 'Labor Transaction' list in Maximo. The 'Select Action' dropdown menu is open, and 'Run Reports' is selected. Red arrows point to the 'Select Action' dropdown and the 'Run Reports' option.

Click on Time Card Report (second page)

The screenshot shows the 'Reports' page in Maximo. The 'Time Card Report' is selected in the 'Reports to Run' list. Red arrows point to the 'Time Card Report' and the 'Create Report' button.



In the **Request Page**, enter the following:

- **Enter Date Mode:** W
- **Enter labor code:** Type in your employee number
- **Date range start:** 7/11/18

Sample screenshot

The screenshot shows the 'Request Page' form. It has a 'Help Text' tab and a 'Parameters' tab. In the 'Parameters' tab, there are several input fields. A red arrow points to the 'Enter Date Mode (W = Weekly, D = Daily):' field, which contains 'W'. Another red arrow points to the 'Select from list of active employees, or enter labor code(s):' field, which contains '783916'. A third red arrow points to the '* Date range start (MM-DD-YYYY). Use for selected day or for current week only:.' field, which contains '7/11/18'. Other fields include 'Select person group(s):', 'Date range end (MM-DD-YYYY). Use only if printing multiple weeks:.', and 'Output format (pdf is default, or leave blank for web browser view):' which is set to 'pdf'.

Click on the **Submit** button when done.

The **Weekly Time Report** will generate

The screenshot shows the 'Weekly Time Report' for the Los Angeles Unified School District. It includes the district logo and the text 'Existing Facilities Maintenance & Operations'. The report is for 'Labor/Person Group: T-PC'. It shows 'Unapproved Labor Transactions' for 'Labor Code: 783916' and 'Name: Lu, Danny' for the date range '7/8/2018 - 7/14/2018'. The table below lists the transactions:

Start Date	Work Order	Site Name	W.O. Description	Reg Hrs	OT Hrs	Reb. Mil.	Rev.
7/11/18	28508876	FREMONT SH	TOILET SEAT BROKEN IN BOYS RESTROOM, FIRST STALL	04:00	04:00	10.00	0

Congratulations! You have just generated a Weekly Time Report.

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).