



Los Angeles Unified School District
Maximo 7.5 / Procurement Module
A/B Letter (Informal Contract) Guide



DEFINITION

According to 8.5 Informally Bid Contracts (A/B Letter) Procedure, an “A” or a “B” letter is an LAUSD informally bid contract for work. Informally bid contracts may be used when a contract is for a sum below the applicable Public Contract Code Section 201111 competitive bidding threshold and:

1. Services are performed by a contractor who employs a type of skilled craftsman not employed by the District; or
2. Services can be economically performed by a contractor using specialized equipment; or,
3. Work is of an urgent nature or is small in scope.

An **“A” letter informally bid contract** is used when it is not possible to predetermine the extent of work or services (scope of work) to be performed. It is strictly a “time and materials” contract.

A **“B” letter informally bid contract** is used whenever the scope of work is fixed or predetermined and is a fixed price contract.

“A” or “B” letter informally bid contracts are not change orders to formal contracts.

“A” or “B” letter informally bid contracts are used for contracts with persons or entities with an active Contractor’s License, service contracts and task order contracts. When work performed does not require a Contractor’s License, the contract must clearly state a contractor’s license is not required and the scope of work be appropriate.

“A” or “B” letter informally bid contracts may **not** be used to contract for professional services (Architects, Engineers and those services requiring specialized training like inspectors, material testers, etc.). **Address questions concerning professional services to Facilities Contracts.**

“A” or “B” letter informally bid contracts may not be used for the procurement of goods.

The A/B Letter (Informal Contract) guide is designed for the Facilities Services Division to track and generate A/B Letter contracts in one system. This guide details step by step instructions on the bid, award and payment process.

NOTE: To initiate an A/B Letter contract, you must first have a work order number. The work order defines the school/site name, short description of the work/scope, funding and other pertinent information to the contract. The work order can be in the status of **WAPPR** (Waiting for Approval) when advertising the contract, but the contract may only be awarded against a work order that is in the status of **APPR** (Approved) or greater and with valid funding.



1. LOGIN

The OAR/Line Senior or Designee will perform this function.

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

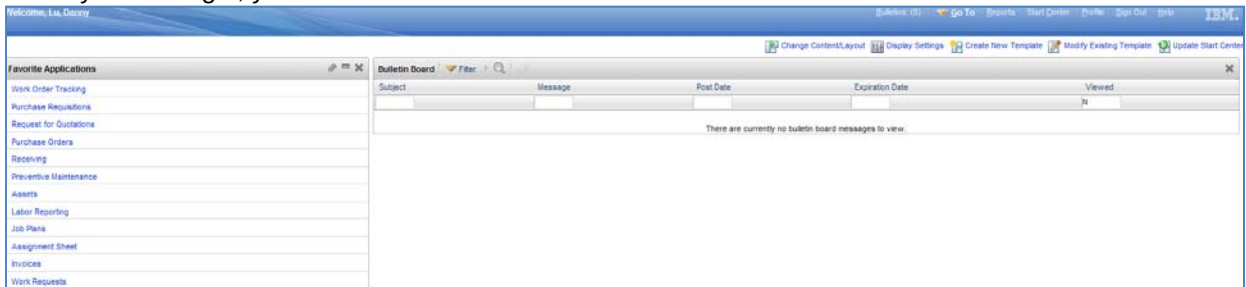
Enter your **Single sign-on** username and password and click on the **Sign In** button.



The login screen features the Tivoli software and IBM logos at the top. It says "Welcome to Maximo" and includes a large nut icon. The login fields are labeled "User Name:" and "Password:". The username "danny.lu" is entered in the first field, and the password is masked with dots. A "Sign In" button is located below the password field. Links for "Forgot Password?" and "New User? Register Now" are also present. At the bottom, a copyright notice reads: "© Copyright IBM Corp. 2007-2012. All rights reserved. See product license for details."

START CENTER

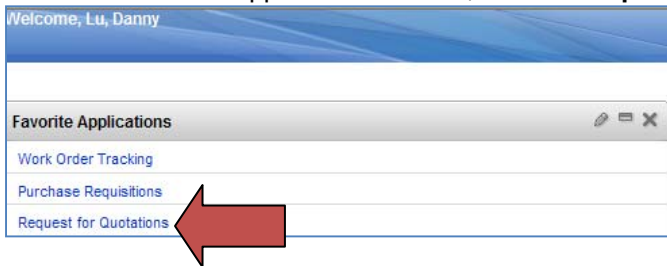
When you first login, you will be taken to the Maximo Start Center.



The Start Center dashboard shows a "Welcome, Lu, Danny" message at the top. Below this is a "Favorite Applications" section with a list of links: Work Order Tracking, Purchase Requisitions, Request for Quotations, Purchase Orders, Receiving, Preventive Maintenance, Assets, Labor Reporting, Job Plans, Assignment Sheet, Invoices, and Work Requests. To the right is a "Bulletin Board" section with a table that has columns for 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."

2. REQUEST FOR QUOTATION (RFQ)

Under the Favorite Applications section, click on **Request for Quotations** application.



A close-up of the "Favorite Applications" list. The list contains the following items: Work Order Tracking, Purchase Requisitions, and Request for Quotations. A red arrow points to the "Request for Quotations" link.



RFQ HOME

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

3. NEW RFQ

To initiate a new work order, click on the  icon, located on the top toolbar.

A **RFQ** number will automatically populate. The status will begin as **INPRG (In Progress)**. In the short description field, type in the description/scope that you wish to print out on the A/B Letter contract.

Note: When advertising a project over the \$15,000 threshold, please include either of the words, **“Existing”** or **“Deteriorated,”** as the Los Angeles County of Education (LACOE) audits our work and it is important that the wording emulates Maintenance and Repair.

Populate the following fields:

Requested By

This field auto-populates with the login users' employee number, but can be changed as needed. Type the employee number of the A/B Letter initiator directly in the field or use the lookup  icon.

PO Type

Type in “A” for A Letter or “B” for B Letter. You may also use the lookup  icon and select the type from the list.

Project Type

Click on the  and select the appropriate project type.



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Craft Enter the 2-letter Craft code of the lead discipline. You may also use the  icon and select the code from the list.

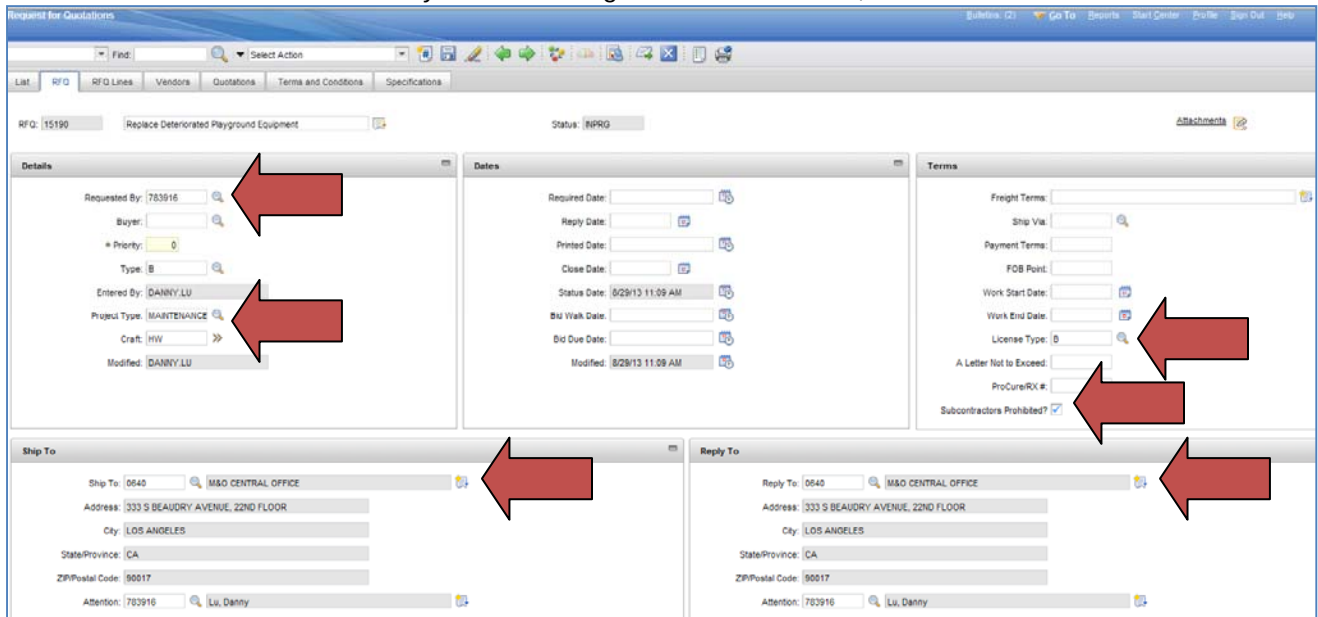
License Type(s) Enter the **License Type** required from the vendor to bid on the contract.

Subcontractors Prohibited If you want to prohibit the use of subcontractors in the contract, you may click on the Subcontractors Prohibited checkbox.

Ship To/Reply To In the **Ship To/Reply To** section, type the four-digit address/section of the Office responsible for the A or B Letter.

Attention: Enter the employee number of the initiator.

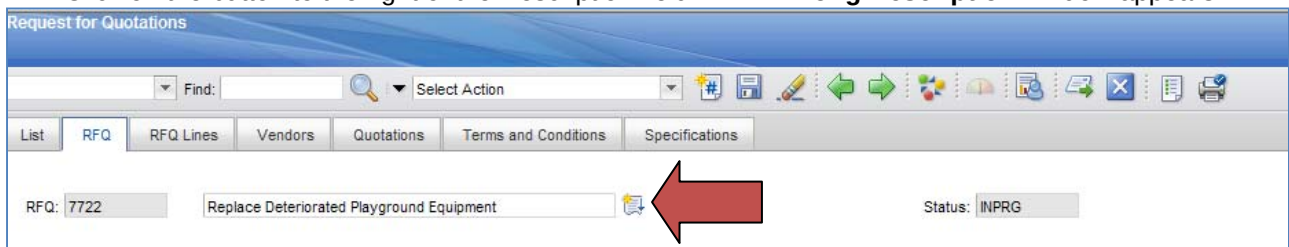
A Letter Not to Exceed If you are initiating an A Letter contract, enter a “not to exceed” amount.



Save the record, click on the  icon, located on the top toolbar.

4. ENTER THE SCOPE OF WORK AND CREATE RFQ LINES

Click on the button to the right of the Description field . A **Long Description** window appears.





A **Long Description** window will appear. Type in or copy/paste the full scope of work. Click on the **OK** button when done.

Long Description

Replace Deteriorated Playground Equipment

Font: sans-serif Size: medium Format: None

The contractor will replace the deteriorated playground equipment located on the main play yard. Contractor will be responsible for the purchase and installation of all materials for this project including the new equipment. Contractor shall adhere to all specifications and all State and Federal Laws applicable will apply. Any and all debris generated from this project shall be removed off site promptly and disposed of in a lawful manner by the contractor. No interior walls have been tested for lead and/or asbestos. All materials are assumed to contain lead and asbestos. Contractor and staff members are required to wear a visible identification badge at all times while working on the site.

Reset Clear **OK**

Save the record, click on the  icon, located on the top toolbar.

RFQ Lines Click on the **RFQ Lines** tab

Request for Quotations

Find: Select Action

List **RFQ** **RFQ Lines** Quotations Terms and Conditions Specifications

RFQ: 7722 Replace Deteriorated Playground Equipment Status: INPRG

New Row Click on the **New Row** button

Request for Quotations

Find: Select Action

List RFQ **RFQ Lines** Vendors Quotations Terms and Conditions Specifications

RFQ: 7722 Replace Deteriorated Playground Equipment Site: LAUSD Status: INPRG

Line	Item	Description	Stockroom	Quantity	Order Unit	Conversion Factor	Work Order
No rows to display.							

Select Spare Parts **New Row**



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Item Enter the following generic Item number that pertains to your Informal Contract.

Informal Contract Type	Item Number
B Letter (Fixed Contract)	9700000000
A Letter (Time and Material)	9690000000
A Letter (Material Only)	9695000000

Request for Quotations

Find: [] Select Action []

List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

RFQ: 15190 Replace Deteriorated Playground Equipment Site: LAUSD

RFQ Lines Filter 1 - 1 of 1

Line	Item	Description	Storeroom
1	9700000000	B Letters (Enter Description)	

Line Item

* Line: 1

* Line Type: Item

* Item: 9700000000 B Letters (Enter Description)

Manufacturer: []

Model: []

Category: []

After entering the Item number, a generic description will appear (e.g. B Letters (Enter Description)). Overtyping this description with your RFQ description.

Request for Quotations

Find: [] Select Action []

List RFQ RFQ Lines Vendors Quotations Terms and Conditions Specifications

RFQ: 15190 Replace Deteriorated Playground Equipment Site: LAUSD

RFQ Lines Filter 1 - 1 of 1

Line	Item	Description	Storeroom
1	9700000000	Replace Deteriorated Playground Equipment	

Fill in the **Quantity**, ***Order Unit** and **Conversion Factor (1)** and ***Work Order** field.

RFQ Lines Filter 1 - 1 of 1

Line	Item	Description	Storeroom
1	9700000000	Replace Deteriorated Playground Equipment	

Line Item

* Line: 1

Line Type: Item

Item: 9700000000 Replace Deteriorated Playground Equipment

Quantity: 1.00

Order Unit: EA

Issue Unit: []

Conversion Factor: 1.00

Manufacturer: []

Model: []

Category: []

Commodity Group: 97000

Commodity Code: []

Remarks: []

Charge To

Storeroom: []

Work Order: 24068043

Related Records

Requisition: []

Requisition Line: []



Note: It is important that you select an **Order Unit** that has **LAUSD** as the **Site**. Only Order Units with the type LAUSD as the Site can interface into SAP.

Select Value

Filter > 1 - 20 of 329 Download

Unit of Measure	Abbreviation	Description	Site
EA		each (EA)	LAUSD

*It is also important that the Work Order is in an **APPR** or higher status and has a valid funding/GL Debit Account line.

Charge To

Storeroom: >>

Work Order: 24068043 >>

Location: S-13475 >>

Asset: >>

GL Debit Account: CC:0001865001-11731 >>

Save the record, click on the  icon, located on the top toolbar.

5. OBTAIN ATU APPROVAL AND ENTER BID DATES ON THE RFQ

ATU Approval Obtain **ATU Approval For Request to Advertise**. This includes the Request Environmental Assessment (Phase 1) and Abatement Design (Phase 2) and Request for Observation of Environmental Work (Phase 3). This is required before you can advertise a contract.

You may download a copy of the ATU documents <http://www.laschools.org/new-site/mo/awms> under Procurement.

You may also contact the Asbestos Technical Unit at 213-745-1450 should you have any question.



Enter Bid Dates Type in the **Bid Walk/Due Dates** in the **RFQ** tab.

Dates

Required Date:

Reply Date:

Printed Date:

Close Date:

Status Date: 8/29/13 11:09 AM

Bid Walk Date: 9/1/13 12:00 AM

Bid Due Date: 9/8/13 12:00 AM

Modified: 8/29/13 3:07 PM

Save the record, click on the  icon, located on the top toolbar.

6. PRINT THE REQUEST TO ADVERTISE

After entering the Bid Dates, you may run/print the **Request to Advertise** report. On the RFQ application, click on **Select Action** and select **Run Reports** from the drop down.

Request for Quotations

Find:

Select Action

- Change Status
- View History
- Copy PR Line Items to RFQ
- Unit of Measure and Conversion
- Attachment Library/Folders
- Duplicate RFQ
- Add to Bookmark
- Run Reports
- Cognos Reporting

RFQ: 15190 Replace Deteriorated Playground

Status: INPRG

Details

Requested By: 783916

Buyer:

Dates

Required Date:

Reply Date:

A **Reports** window will appear. Click on the **AB Letter 04 Request For Advertising** report

Reports

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

On Demand Reports | Scheduling Status

Reports to Run: Filter 1 - 5 of 31

Description
AB Letter 01 Main (Attachment H)
AB Letter 02 Bid Tab (Attachment G)
AB Letter 03 Detailed Project Scope
AB Letter 04 Request For Advertising
AB Letter 05 Pre Bidwalk Sign-In Sheet



A **Request Page** will appear. Enter the **RFQ** Number and provide values for each of the questions. Click on the **Submit** button when done.

The screenshot shows the 'Request Page' form. Red arrows point to the following fields: 'Enter RFQ Number' (15190), 'Is RFQ cost projected to be under \$15,000 (Y or N)?' (N), 'Enter bid type (S = Sealed, N = Other - Email, FAX, phone, or other):' (S), 'Work Type (1 = Carpentry, 2 = Electrical, 3 = Glazing, 4 = HVAC, 5 = Metal, ...)' (5), and 'Scope (brief):' (Replace).

A **BIRT Report Viewer** window will appear. Review the information and click on the printer  icon to print the document.

The screenshot shows the 'Reporting' window with a red arrow pointing to the printer icon. The report is titled 'Request for Advertising - A/B LETTERS' and includes the following information:

Los Angeles Unified School District	
OFFICE OF THE SUPERINTENDENT	FACILITIES SERVICES DIVISION
Request for Advertising - A/B LETTERS	
RFQ #: 15190	
Work Order Number *	24068043
Initiator *	Lu, Danny
Initiator Phone # *	213-241-0573
Description *	Replace Deteriorated Playground Equipment
Supervisor Initial *	
Bid Walk Date/Time *	Sep 1, 2013 12:00 AM
Bids Due Date/Time *	Sep 8, 2013 12:00 AM
Advertised by*	
Scope of Work (Brief): Replace Deteriorated Playground Equipment	
Maintenance Area / Region *	M&O CENTRAL OFFICE
Work Type:	Metal
Contract Work Type:	MAINTENANCE

If there are any further details that you wish to include on the advertisement, handwritten those on the form in the **Additional Notes** section after print. Print and obtain **Supervisor Initial** and submit the **Request for Advertising** report to Clerical or Designee with a copy of the **ATU Approval to Advertise** for posting on the **LAUSD Bid Walk Registration Web Page**: <http://mo.laschools.org/fis/existing-facilities/m-and-o/bidwalks/>.



7. ENTER REGISTERED VENDORS IN VENDORS TAB. PRINT THE PRE-BID WALK REPORTS AND CONDUCT BID WALK.

Print the list of **Registered Vendors** from the **Bid Walk Registration Web Page**. This list can also be obtained from Clerical or the designee responsible for entering the Request to Advertise on the Bid Walk Registration Web Page.

On the RFQ, create an entry for each contractor (Vendor) who registered in the **Vendors** tab of the **Request for Quotations (RFQ)**. Click on the **Vendors** tab.

Request for Quotations

Find: [] Select Action []

List RFQ RFQ Lines **Vendors** Terms and Conditions Specifications

RFQ: 15190 Replace Deteriorated Playground Equipment Status: INPRG

In the **Vendors** tab, click on the **New Row** button under **RFQ Vendors**.

Request for Quotations

Find: [] Select Action []

List RFQ RFQ Lines **Vendors** Terms and Conditions Specifications

RFQ: 15190 Replace Deteriorated Playground Equipment Site: LAUSD Status: INPRG

RFQ Vendors 0 of 0

Vendor	Description	Contact	Phone	Fax
...No rows to display...				

Create PO Create Contract **New Row**

In the **Details** view, enter the ***Vendor Number** in the **Vendor** field.

RFQ Vendors Filter > 1 - 1 of 1

Vendor	Description
156076	RACO INDUSTRIES

Details

* Vendor: 156076 RACO INDUSTRIES

Contact: []

SAP Vendor#: 1000001392

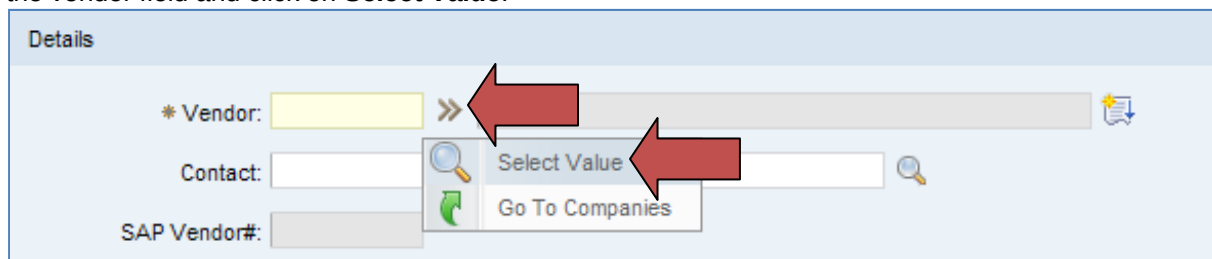
Phone: 800-446-1991

Fax: 509-693-3692

NOTE: The Vendor Number is typically the old IFS Vendor Number, however in some cases; it may be the new SAP Vendor Number. It is important that your Vendor has a SAP Vendor Number; an Informal Contract can only be awarded to vendors who have a SAP Vendor #.



If you do not know the Vendor Number, you may search for one by clicking on the  icon to the right of the vendor field and click on **Select Value**.



Details

* Vendor: 

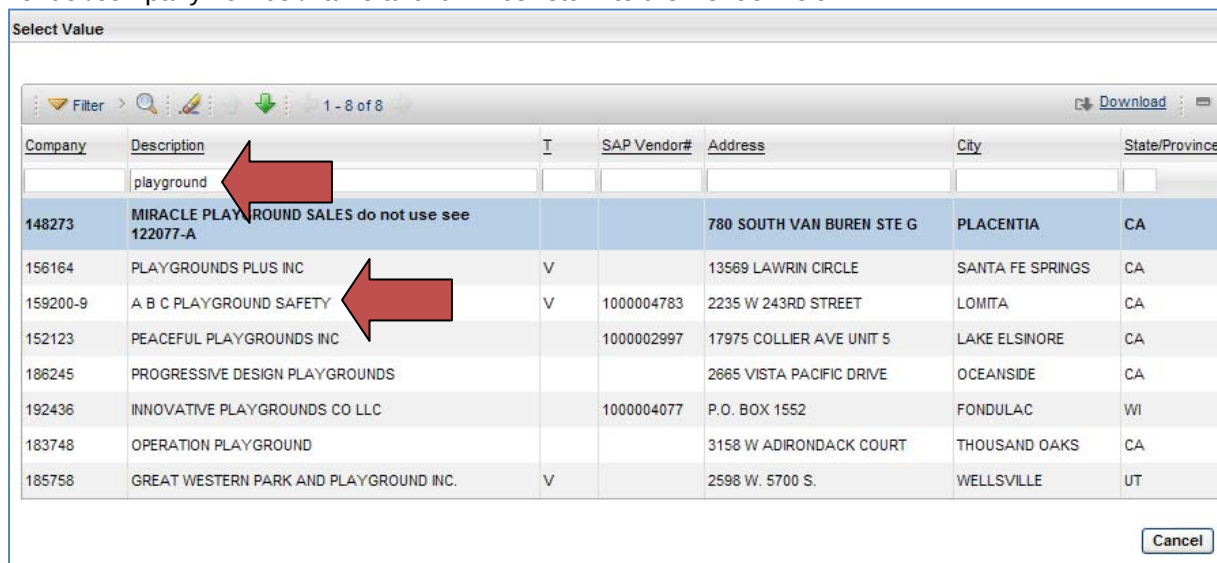
Contact:

SAP Vendor#:

Select Value

Go To Companies

A Select Value window will appear. You may search for a vendor by any of the following fields: **Description, SAP Vendor#, Address, City, State/Province**. To select the vendor, click on the vendor/company number/name and it will be return to the Vendor field.

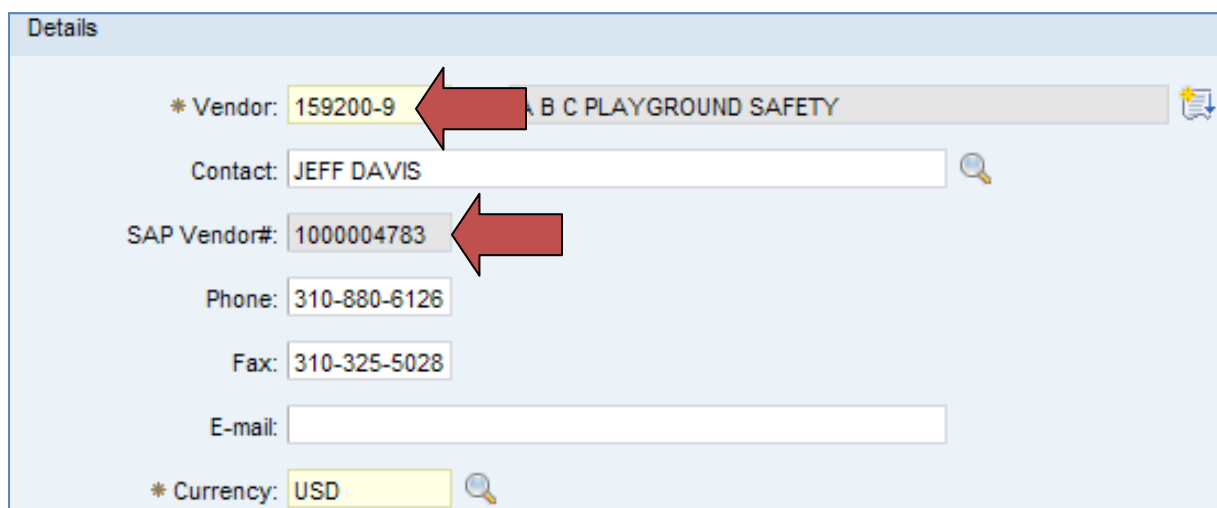


Select Value

Filter >  1 - 8 of 8  Download

Company	Description	I	SAP Vendor#	Address	City	State/Province
	playground					
148273	MIRACLE PLAYGROUND SALES do not use see 122077-A			780 SOUTH VAN BUREN STE G	PLACENTIA	CA
156164	PLAYGROUNDS PLUS INC	V		13569 LAWRIN CIRCLE	SANTA FE SPRINGS	CA
159200-9	A B C PLAYGROUND SAFETY	V	1000004783	2235 W 243RD STREET	LOMITA	CA
152123	PEACEFUL PLAYGROUNDS INC		1000002997	17975 COLLIER AVE UNIT 5	LAKE ELSINORE	CA
186245	PROGRESSIVE DESIGN PLAYGROUNDS			2665 VISTA PACIFIC DRIVE	OCEANSIDE	CA
192436	INNOVATIVE PLAYGROUNDS CO LLC		1000004077	P.O. BOX 1552	FONDULAC	WI
183748	OPERATION PLAYGROUND			3158 W ADIRONDACK COURT	THOUSAND OAKS	CA
185758	GREAT WESTERN PARK AND PLAYGROUND INC.	V		2598 W. 5700 S.	WELLSVILLE	UT

Cancel



Details

* Vendor: 159200-9 A B C PLAYGROUND SAFETY 

Contact: JEFF DAVIS 

SAP Vendor#: 1000004783 

Phone: 310-880-6126

Fax: 310-325-5028

E-mail:

* Currency: USD 

Repeat steps for each additional vendor who registered for the Bid Walk. Save the record, click on the  icon, located on the top toolbar.



Note: If you cannot identify the vendor from the list, you may contact Leticia Tungol (Leticia.Tungol@lausd.net) and request her create a **Temporary Vendor Number**. If Leticia Tungol is not available, you may contact the Maximo Team for assistance. Temporary Vendors may bid on jobs; however a contract cannot **not** be Awarded to a Temporary Vendor.

If a Temporary Vendor is the lowest bidder, to award the vendor you must have them register for a permanent SAP Vendor number and contact Leticia to create the permanent vendor number in Maximo. Update the vendor number in the RFQ and award.

After entering the Vendors, run/print the **Pre-Bid Walk** reports. On the RFQ application, click on **Select Action** and select **Run Reports** from the drop down.

A **Reports** window will appear. Print the following reports for the Pre-Bid Walk.

1. AB Letter 01 Main (Attachment H) – *Select S for Sample Watermark*
2. AB Letter 03 Detailed Project Scope
3. AB Letter 05 Pre Bidwalk Sign-In Sheet
4. AB Letter 06 Safety Prequalification Notice
5. AB Letter 07 ACORD Insurance Certification (Attachment B)
6. AB Letter 09 Bid Pack Cover Letter
7. AB Letter 10 Phone / Fax / Email Bid Form (Optional)
8. AB Letter 12 Insurance Requirements (Attachment C)
9. AB Letter 13 Letter of Assent (Attachment O)
10. AB Letter 14 Performance Bond (Attachment E)
11. AB Letter 15 Prevailing Wage Certificate - *If project greater than \$15,000*
12. AB Letter 16 Sealed Bid Form (Attachment J)
13. AB Letter 17 LAUSD Code of Ethics
14. AB Letter 19 Job Start Checklist - *If project greater than \$15,000*
15. AB Letter 21 Notice to Public Entity - *If project greater than \$15,000*
16. AB Letter 22 Public Works Payroll Form - *If project greater than \$15,000*

Make one copy for each of the registered vendors (bring extra in case of walk-ins).

Bid Walk: Conduct the Bid Walk according to the existing practice.



8. RECEIVE BIDS, CHANGE STATUS OF RFQ TO SENT AND ENTER BID RESULT INFORMATION IN QUOTATIONS TAB

For Sealed Bids

Clerical receives, time-stamps, and opens **Sealed Bids** using the existing process. Clerical routes the Bid results to the OAR/Line Senior or Designee for entry into Maximo

For Telephone, Fax, E-mail or Other Bids

The **OAR/Line Senior** receives Telephone, Fax, Email, or Other Bids submitted on the **Telephone/Fax/E-mail Bid Form**. Clerical routes bid results to the OAR/Line Senior or Designee. The OAR/Line Senior or Designee posts **all** Bid results in the **RFQ Quotations** tab using the instructions that follow.

On the RFQ record, click on the **Vendors** tab.

Vendor	Description	Contact
159200-9	A B C PLAYGROUND SAFETY	JEFF DAVIS
192436	INNOVATIVE PLAYGROUNDS CO LLC	SHEILA STETTbacher

Click on the twistee  icon for each Vendor to open the Details. Enter the **Bid Type**, the **Contact** and any comments needed for this Vendor in the **Comments** field (e.g. Did not submit bid).

For all **Sealed Bids**, enter the date and time the Bid is **opened** in the **Date of Vendor's Reply** field. For all other bid Types, enter the date and time the Bid was **received** in the **Date of Vendor's Reply** field.

Vendor	Description	Contact
156076	RACO INDUSTRIES	
159200-9	A B C PLAYGROUND SAFETY	JEFF DAVIS
192436	INNOVATIVE PLAYGROUNDS CO LLC	SHEILA STETTbacher

Vendor: 156076	RACO INDUSTRIES
Contact: Danny Lu	
SAP Vendor#: 1000001392	
Phone: 800-446-1991	
Fax: 509-693-3692	
E-mail:	
* Currency: USD	

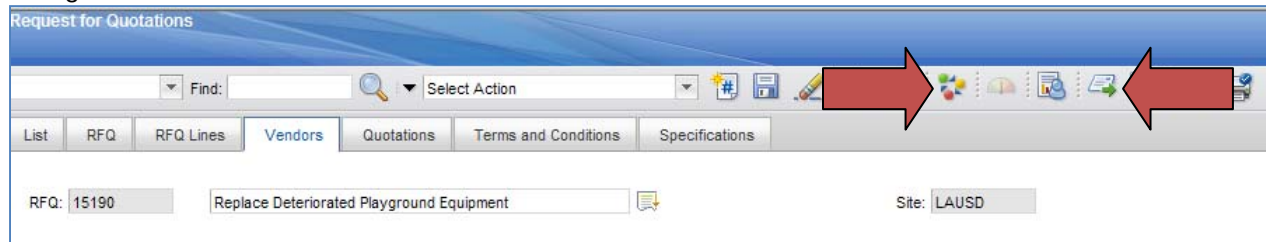
Ship Via:	
FOB Point:	
Bid Type: SEALED BID	
Payment Terms:	
Freight Terms:	
Pay Tax to Vendor?	☒
Comments:	
Vendor Quote #:	
Vendor Reply Date: 9/8/13 10:00 AM	

Repeat steps to capture all vendors that registered, attended the Pre-Bid Meeting and/or submitted a bid.

Save the record, click on the  icon, located on the top toolbar.

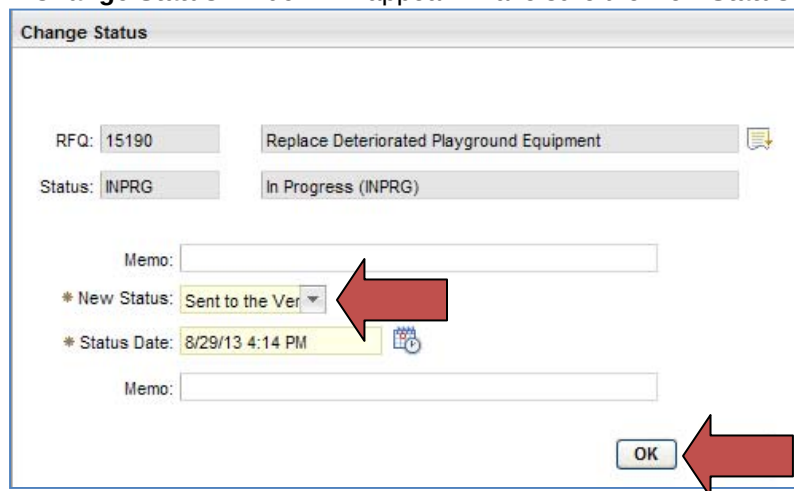


Change Status: The Status of the RFQ must be changed to **Sent to Vendor (SENT)** to enter the bid amounts. You may click on the  icon to change the status or the Sent  icon to initiate the status change.



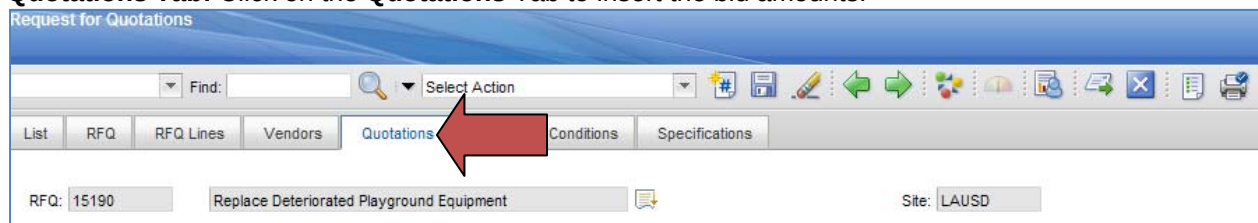
The screenshot shows the 'Request for Quotations' interface. At the top, there's a 'Find:' field and a 'Select Action' dropdown. Below this are tabs for 'List', 'RFQ', 'RFQ Lines', 'Vendors', 'Quotations', 'Terms and Conditions', and 'Specifications'. The 'Vendors' tab is currently selected. Below the tabs, there's a section for 'RFQ: 15190' and 'Replace Deteriorated Playground Equipment'. To the right, it says 'Site: LAUSD'. Two red arrows point to the 'Change Status' and 'Sent' icons in the top toolbar.

A **Change Status** window will appear. Make sure the New **Status is Sent to Vendor (SENT)**. Click **OK**.



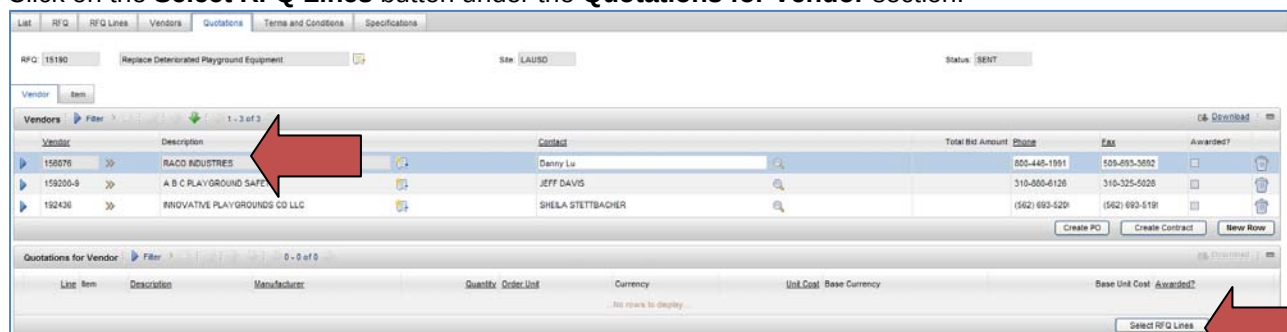
The 'Change Status' dialog box is shown. It contains fields for 'RFQ: 15190' and 'Replace Deteriorated Playground Equipment'. Below these, the 'Status' is 'INPRG' and 'In Progress (INPRG)'. There's a 'Memo:' field. The 'New Status' dropdown is set to 'Sent to the Ver' (with a red arrow pointing to it). The 'Status Date' is '8/29/13 4:14 PM'. At the bottom right, there's an 'OK' button (with a red arrow pointing to it).

Quotations Tab: Click on the **Quotations** Tab to insert the bid amounts.



The screenshot shows the 'Request for Quotations' interface with the 'Quotations' tab selected. The 'Vendors' tab was previously selected. The 'RFQ: 15190' and 'Replace Deteriorated Playground Equipment' information is still visible. A red arrow points to the 'Quotations' tab.

Quotations for Vendor: Click on the **Vendor Name** who you wish to enter the bid amount for. Next Click on the **Select RFQ Lines** button under the **Quotations for Vendor** section.



The 'Quotations for Vendor' screen is shown. It has a table with columns: Vendor, Description, Contact, Total Bid Amount, Phone, Fax, and Awarded?. The table lists three vendors: RACO INDUSTRIES, A B C PLAYGROUND SAFE, and INNOVATIVE PLAYGROUNDS CO LLC. A red arrow points to the 'Vendor' column. Below the table, there's a 'Quotations for Vendor' section with a 'Select RFQ Lines' button (with a red arrow pointing to it). At the bottom right, there are buttons for 'Create PO', 'Create Contract', and 'New Row'.



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A **Select RFQ Lines** window will appear. Click on the checkbox of the RFQ Line that the vendor submitted a bid for and click **OK**.

The screenshot shows the 'Select RFQ Lines' window. It has a table with columns: Line, Item, Description, Storeroom, Quantity, Order Unit, Conversion Factor, Location, GL Debit Account, and Required Date. The first row is selected, showing Line 1, Item 9700000000, and Description 'Replace Deteriorated Playground Equipment'. A red arrow points to the checkbox in the first column, and another red arrow points to the 'OK' button at the bottom right.

The line will now appear in the **Quotations for Vendor XXXX** field.

The screenshot shows the 'Quotations for Vendor 156076' window. It has a table with columns: Vendor, Description, Contact, Total Bid Amount, Phone, Fax, and Awarded?. The first row is selected, showing Vendor 156076, Description 'RACO INDUSTRIES', and Contact 'Danny Lu'. A red arrow points to the 'Select RFQ Lines' button at the bottom right.

On the **Quotations for Vendor XXX** line, click on the  icon to open the details. Enter the **Bid Amount** in the **Unit Cost** field. Remember to change the **Tax code** to **0**.

The screenshot shows the 'Quotations for Vendor 156076' details window. It has a table with columns: Line, Item, Description, and Manufacturer. The first row is selected, showing Line 1, Item 9700000000, and Description 'Replace Deteriorated Playground Equipment'. A red arrow points to the details icon in the first column. Below the table, there are fields for Line, Line Type, Item, and Remarks. The 'Quantity and Costs' section shows fields for Currency (USD), Quantity (1.00), Order Unit (EA), Unit Cost (24,000.00), Line Cost (24,000.00), Tax Code (0), and Tax Amount (0.00). The 'Base Costs' section shows fields for Currency (USD), Unit Cost (24,000.00), Line Cost (24,000.00), and Tax Amount (0.00). Red arrows point to the 'Unit Cost' and 'Tax Code' fields.

Repeat steps for each vendor. Save the record, click on the  icon, located on the top toolbar.



9. IDENTIFY VENDOR TO AWARD, ENTER CONTRACT DETAILS AND CHANGE RFQ STATUS TO INPRG AND ENTER WORK START/END DATES.

In the **Quotations** tab, click on the name of the vendor you wish to award in the Vendor section. The bid amount will appear in the **Quotations for Vendor XXXX** section. Check the **Awarded** checkbox.

Vendor	Description	Contact	Total Bid Amount	Phone	Fax	Awarded?
156076	RACO INDUSTRIES	Danny Lu		800-446-1991	509-693-3692	☐
159200-9	A B C PLAYGROUND SAFETY	JEFF DAVIS		310-880-6126	310-325-5028	☐
192436	INNOVATIVE PLAYGROUNDS CO LLC	SHEILA STETTbacher		(562) 693-5200	(562) 693-5191	☐

Line Item	Description	Manufacturer	Quantity	Order Unit	Currency	Unit Cost	Base Currency	Base Unit Cost	Awarded?
1	8700000000	Replace Deteriorated Playground Equipment	1.00	EA	USD	24,000.00	USD	24,000.00	☐

In the **Quotations** tab, click on the  icon of the vendor that you awarded in the Vendor section.

Vendor	Description	Contact
156076	RACO INDUSTRIES	Danny Lu
159200-9	A B C PLAYGROUND SAFETY	JEFF DAVIS
192436	INNOVATIVE PLAYGROUNDS CO LLC	SHEILA STETTbacher

The **Contract Details** for the vendor will be displayed. Fill in all the Contract Details fields.

Vendor	Description	Contact	Total Bid Amount	Phone	Fax	Awarded?
156076	RACO INDUSTRIES	Danny Lu		800-446-1991	509-693-3692	☐
159200-9	A B C PLAYGROUND SAFETY	JEFF DAVIS		310-880-6126	310-325-5028	☐
192436	INNOVATIVE PLAYGROUNDS CO LLC	SHEILA STETTbacher		(562) 693-5200	(562) 693-5191	☐

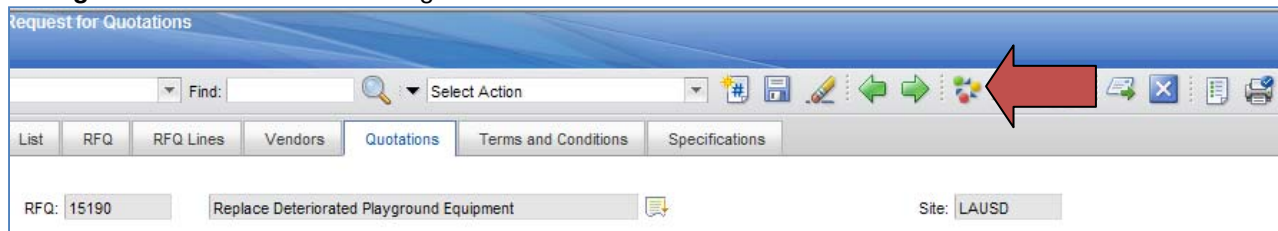
Details
Vendor: 156076 >> RACO INDUSTRIES Contact: Danny Lu SAP Vendor#: 1000001392 Phone: 800-446-1991 Fax: 509-693-3692 E-mail: Currency: USD Ship Via: FOB Point: Payment Terms: Freight Terms: Pay Tax to Vendor? ☒ Vendor Quote #: Vendor Reply Date: 9/8/13 10:00 AM Bid Taken By: SEALED BID

Contract Details
Contractor License Number: A123 Auto Ins. Exp. Date: 10/1/13 Insurance Verified By: M. Merrick Contractor Classification: B Liability Ins. Exp. Date: 10/1/13 Insurance Verified Date: 10/1/13 Financial Rating(s) (Auto, Liability): A, A Workers Comp Exp. Date: 10/1/13 Safety Prequal Date: 10/1/13

Save the record, click on the  icon, located on the top toolbar.



Change Status: Click on the Change Status  icon in the toolbar.



Request for Quotations

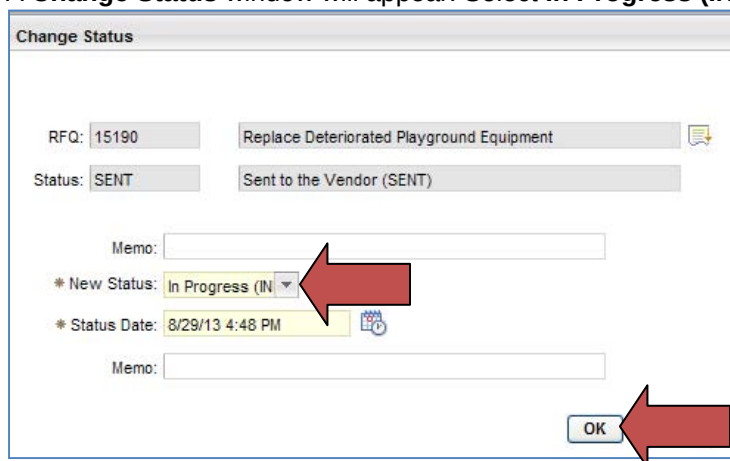
Find: Select Action

List RFQ RFQ Lines Vendors **Quotations** Terms and Conditions Specifications

RFQ: 15190 Replace Deteriorated Playground Equipment Site: LAUSD

A red arrow points to the Change Status icon in the toolbar.

A **Change Status** window will appear. Select **In Progress (INPRG)** as the New Status and click **OK**.



Change Status

RFQ: 15190 Replace Deteriorated Playground Equipment

Status: SENT Sent to the Vendor (SENT)

Memo:

* New Status: **In Progress (INPRG)**

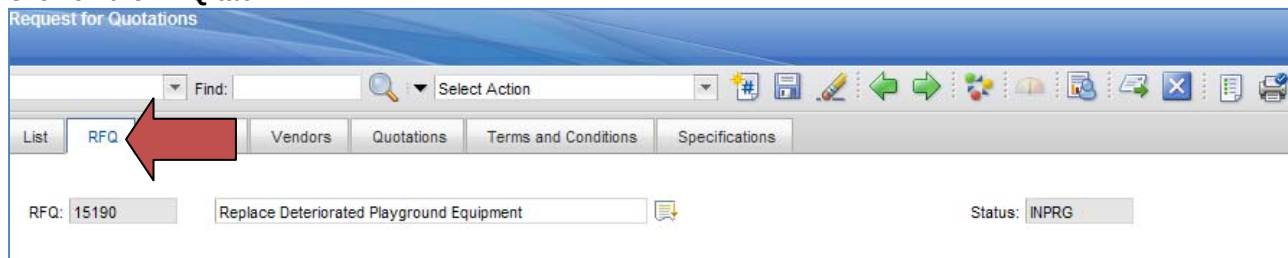
* Status Date: 8/29/13 4:48 PM

Memo:

OK

Red arrows point to the 'In Progress (INPRG)' status and the 'OK' button.

Click on the **RFQ** tab.



Request for Quotations

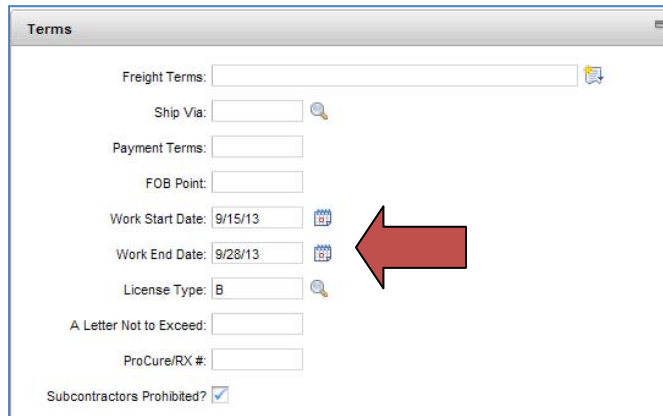
Find: Select Action

List **RFQ** Vendors Quotations Terms and Conditions Specifications

RFQ: 15190 Replace Deteriorated Playground Equipment Status: INPRG

A red arrow points to the RFQ tab.

Enter the **Work Start/End Dates** in the **Terms** section.



Terms

Freight Terms:

Ship Via:

Payment Terms:

FOB Point:

Work Start Date: 9/15/13

Work End Date: 9/28/13

License Type: B

A Letter Not to Exceed:

ProCure/RX #:

Subcontractors Prohibited? ☒

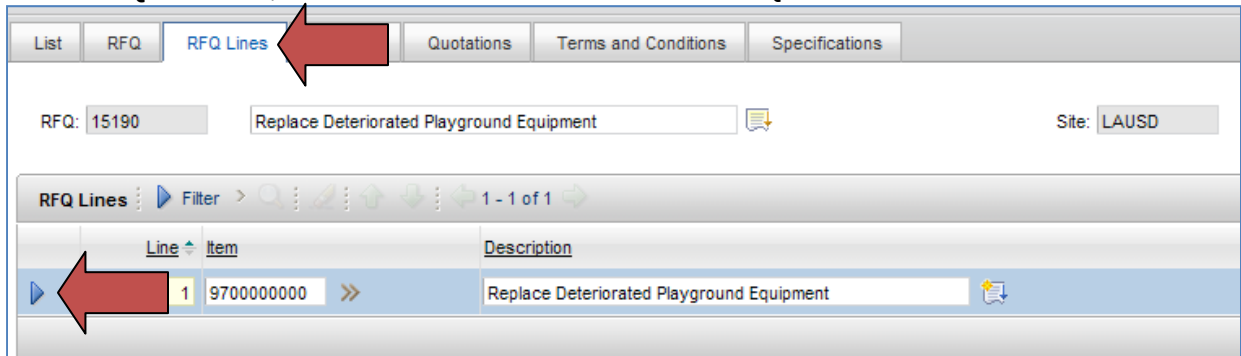
A red arrow points to the Work End Date field.

Save the record, click on the  icon, located on the top toolbar.

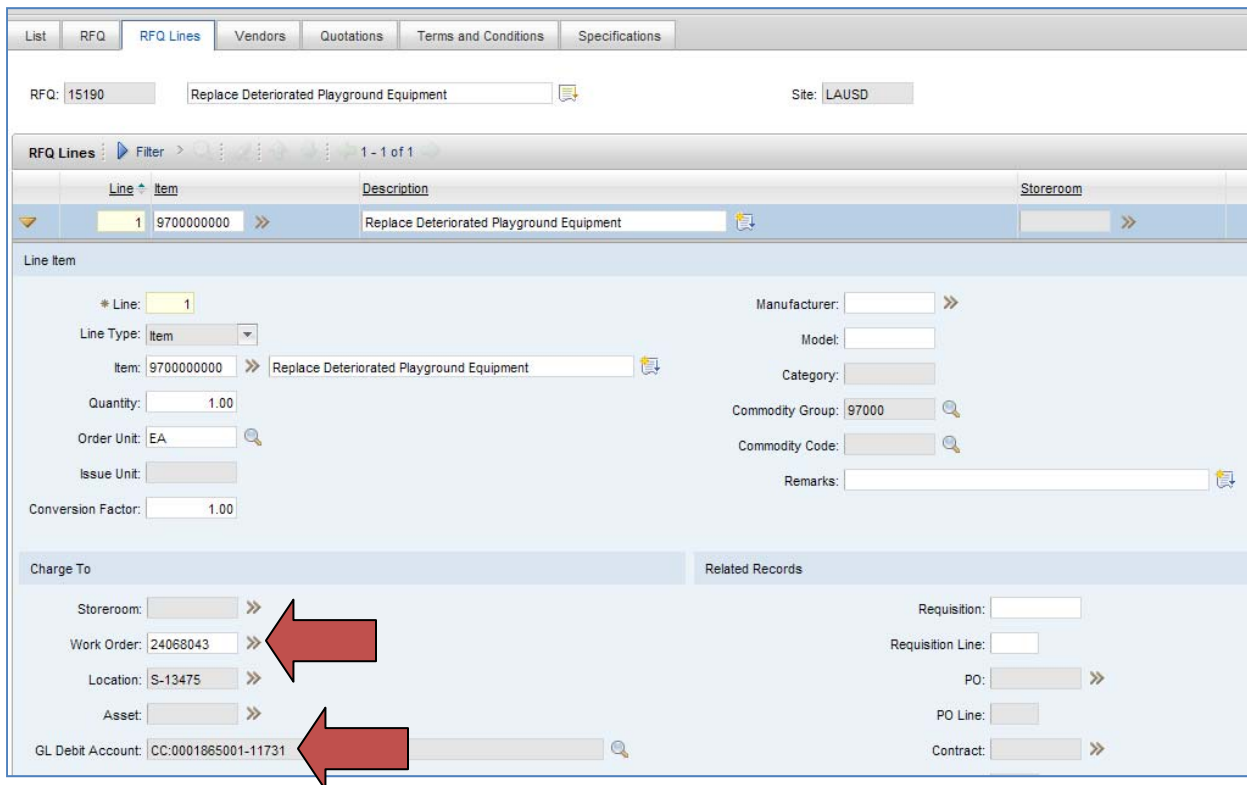


10. VERIFY WORK ORDER GL ACCOUNT

On the **RFQ Lines** tab, click on the  icon to the left of the RFQ Lines to view the details.



The RFQ Lines details will display; verify that the Work Order number you entered has a valid **GL Debit Account**.

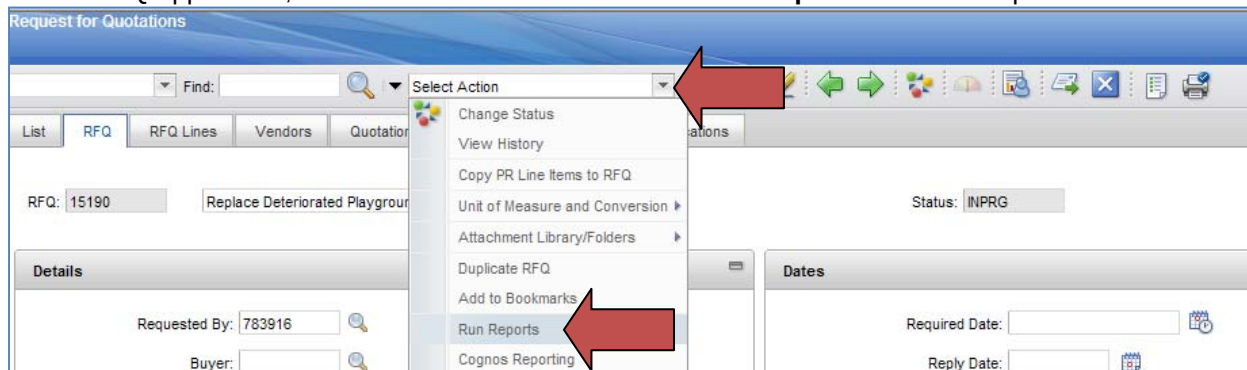


If the **GL Debit Account** value is missing, please go to the work order and enter the appropriate GL Debit Account. Return back to the RFQ Lines and re-enter the work order number to update the information.

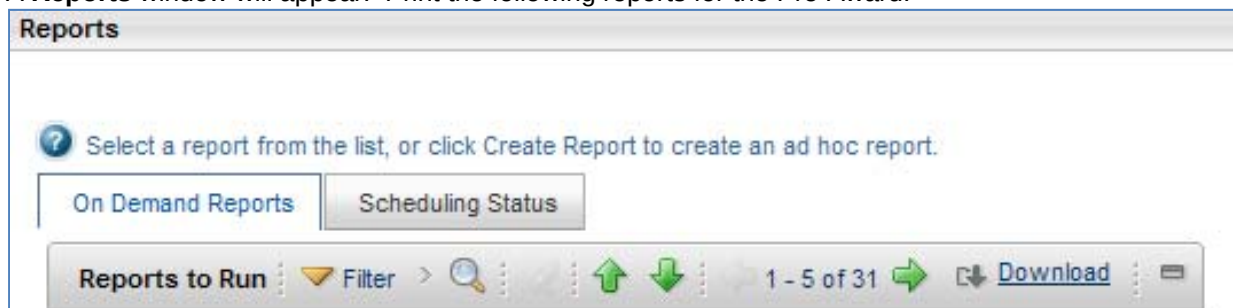


11. PRINT PRE-AWARD DOCUMENTS

On the RFQ application, click on **Select Action** and select **Run Reports** from the drop down.



A **Reports** window will appear. Print the following reports for the Pre-Award.



1. AB Letter 01 Main (Attachment H) – *Select D for Pre-Award Watermark*
2. AB Letter 02 Bid Tab (Attachment G)
3. AB Letter 08 B Letter Checklist

Submit reports to Director or Designee for review and signature.

12. DIRECTOR OR DESIGNEE REVIEW/APPROVES (SIGNATURE) THE PRE-AWARD DOCUMENTS

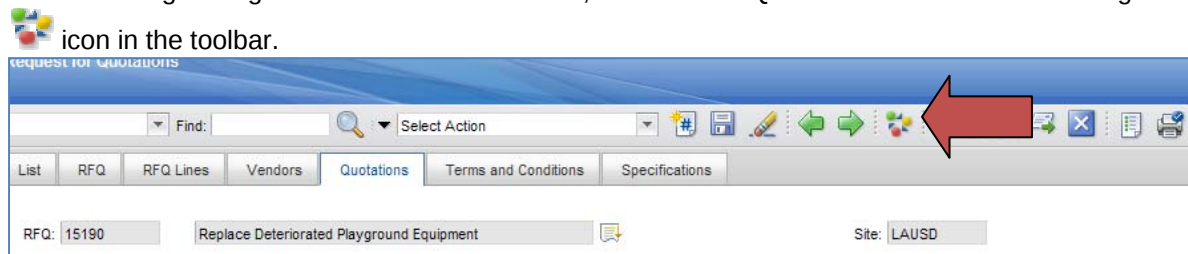
The Director or Designee performs this function.

The Director or Designee reviews the Pre-Award Documents. Upon approval (sign the Checklist and AB Letter Bid Tab), the DIRECTOR or Designee routes the package to Clerical to generate the PO number.

13. CLERICAL GENERATES PO NUMBER

The Clerical Department performs this function.

After receiving the signed Pre-Award Documents; Go to the RFQ record and click on the Change Status





A **Change Status** window will appear. Select **Ready to Interface (INTREADY)** as the New Status and click **OK**.

The screenshot shows the 'Change Status' window for RFQ 15190, 'Replace Deteriorated Playground Equipment'. The current status is 'INPRG' (In Progress). The 'New Status' dropdown is set to 'Ready to Interf' (Ready to Interface). The 'Status Date' is 8/29/13 5:25 PM. Red arrows point to the 'New Status' dropdown and the 'OK' button.

This status change will trigger Maximo to interface the RFQ information into SAP to generate a PO number.

If the interface is successful, the status of the RFQ will change to **CLOSE**. The person who changed the status to **INTREADY** and initiator of the RFQ will receive an email of the status and the generated SAP PO number.

If the interface rejected, the status of the RFQ will be changed to **INTREJECT**. At this point, clerical will inform the requestor that there is a rejection. Requestor to resolve the rejection and inform clerical to change the status back to **INTREADY** to repeat the interface process.

Repeat process until status is changed to **CLOSE**.

The screenshot shows the RFQ record for RFQ 15190, 'Replace Deteriorated Playground Equipment'. The status is now 'CLOSE'. A red arrow points to the 'Status: CLOSE' field.

14. PRINT AB LETTER POST-AWARD DOCUMENTS AND SUBMIT TO THE DIRECTOR OR DESIGNEE FOR APPROVAL

The Clerical Department performs this function.

On the RFQ record, click on the **Select Action** drop down and select **Run Reports**.

The screenshot shows the RFQ record for RFQ 15190, 'Replace Deteriorated Playground Equipment'. The 'Select Action' dropdown menu is open, showing options like 'Change Status', 'View History', 'Copy PR Line Items to RFQ', 'Unit of Measure and Conversion', 'Attachment Library/Folders', 'Duplicate RFQ', 'Add to Bookmarks', 'Run Reports', and 'Cognos Reporting'. A red arrow points to the 'Run Reports' option.



A **Reports** window will appear. Print the following reports for the Post-Award.

1. AB Letter 01 Main (Attachment H)
2. AB Letter 15 Prevailing Wage Certificate
3. AB Letter 25 Notice of Completion (Attachment I)
4. AB Letter 27 Contractor Performance Evaluation
5. Purchase Order Details Report (*Purchase Order Application*)

Submit reports to Director or Designee for review and signature.

15. DIRECTOR OR DESIGNEE REVIEW/APPROVES (SIGNATURE) THE POST-AWARD DOCUMENTS

The Director or Designee performs this function.

The Director or Designee reviews and signs the Post-Award Documents. Upon approval, the Director or Designee signs the A/B Letter contract and any necessary supporting documents and routes the package to Clerical.

16. CLERICAL SUBMIT SIGNED POST-AWARD DOCUMENTS TO OAR/LINE SENIOR OR DESIGNEE

The Clerical Department performs this function.

Clerical to submit Post Award documents to OAR/Line Senior or Designee.

17. OAR/LINE SENIOR OR DESIGNEE TO OBTAIN SIGNATURE OF AWARDED CONTRACTOR ON AB LETTER CONTRACT

The OAR/Line Senior or Designee performs this function.

The OAR/Line Senior or Designee to obtain the signature of the awarded contractor on the A/B Letter contract (provide copy of contract to contractor). Keep original copies in holding file until final vendor invoice.

18. OPTIONAL: MODIFY A/B LETTER

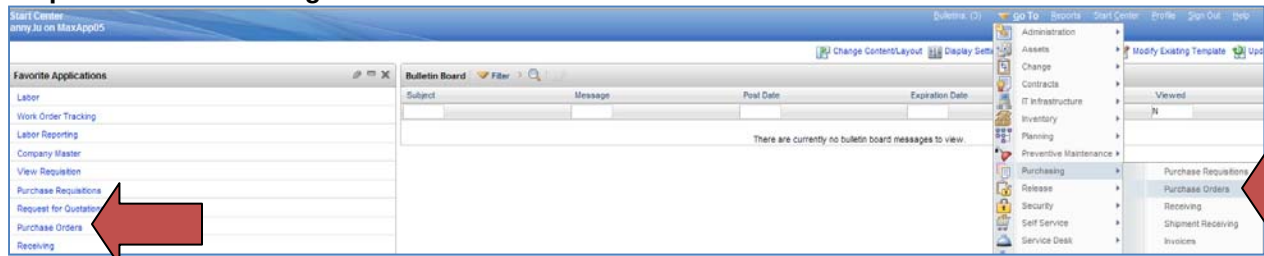
The OAR/Line Senior or Designee performs this function.

You can **only** modify the **Description, Quantity, Unit Cost, Tax Rate** or the **Work Order** of a A/B Letter contract. You cannot change any other information. You may refer to the Additional Unforeseen Work (G-A-3) document for more information. If you need to modify any other information, you will have to **CANCEL** the **Purchase Order** and generate a new **RFQ**.



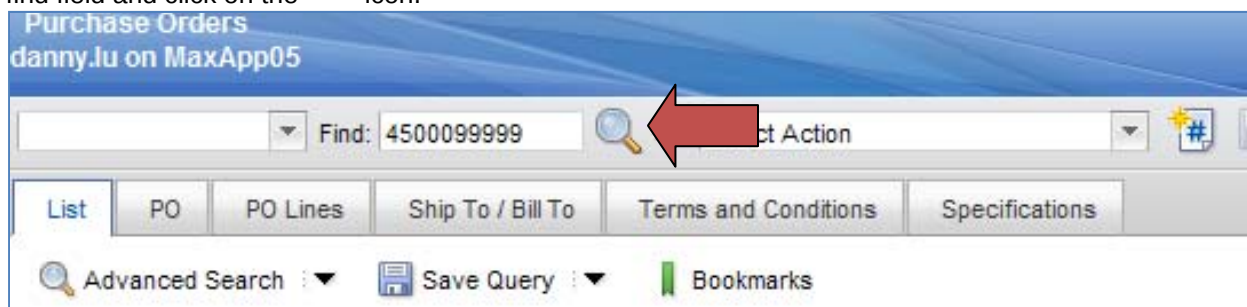
To change the **Description**, **Quantity**, **Unit Cost**, **Tax Rate** or the **Work Order**, go to the **PO record** in the **Purchase Order** application.

Go to the **Purchase Order** application through the Start Center Favorites application or **Go To dropdown → Purchasing → Purchase Order**.

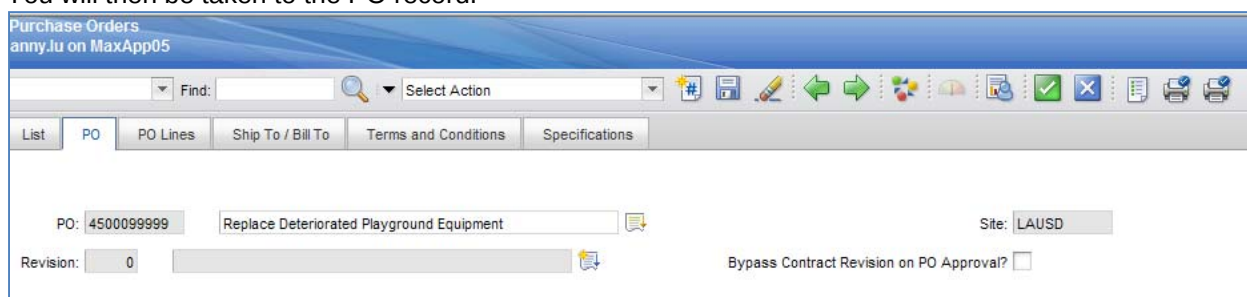


PURCHASE ORDER HOME

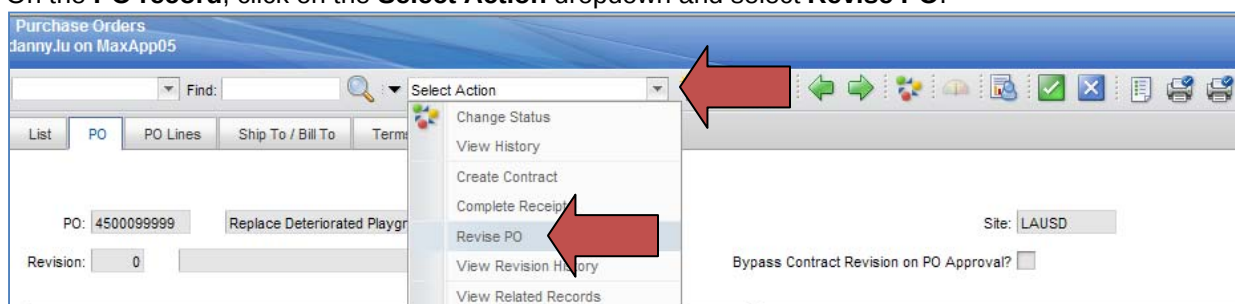
You will be taken to the **Purchase Orders** home screen. Type in the SAP generated PO number in the find field and click on the  icon.



You will then be taken to the PO record.

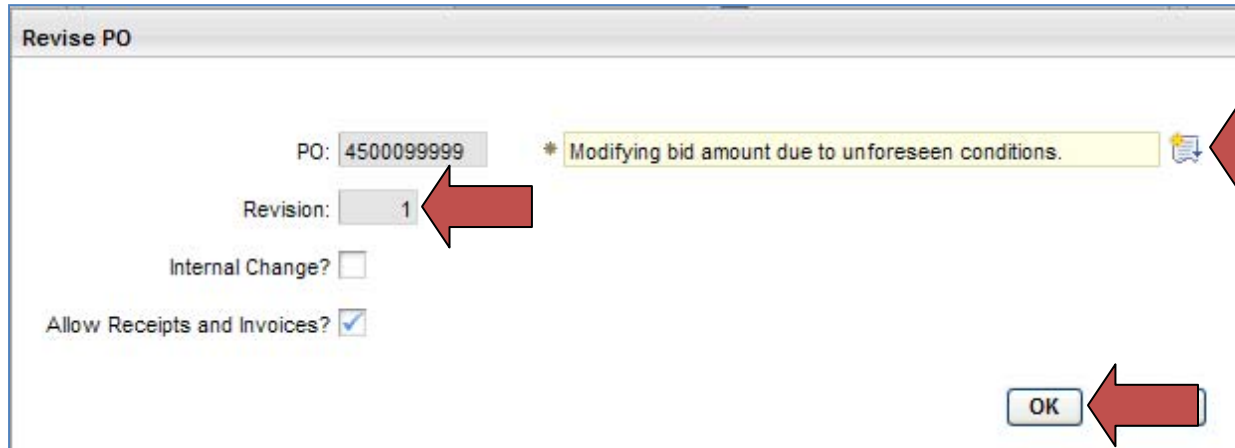


On the **PO record**, click on the **Select Action** dropdown and select **Revise PO**.





A **Revise PO** window will appear. To the right of the PO number, type in your justification for the modification. You may insert additional justification language in the long description by clicking on the  icon. You will also notice that the Revision number is now 1. Click **OK** when done.

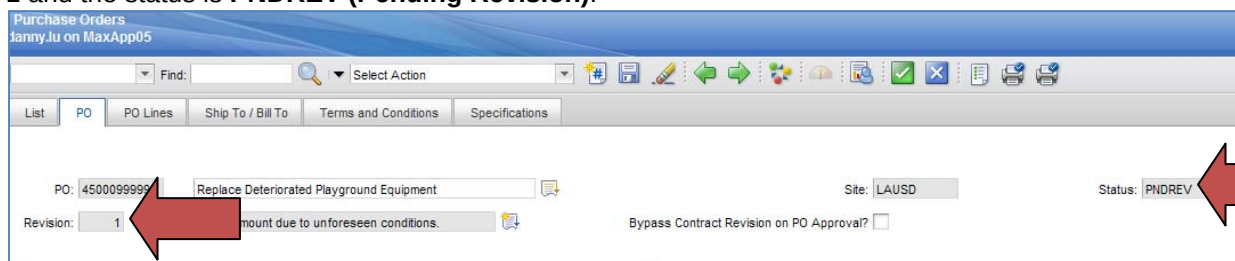


The screenshot shows the 'Revise PO' window. It contains the following fields and controls:

- PO: 4500099999
- Revision: 1
- Internal Change? ☐
- Allow Receipts and Invoices? ☒
- A justification text box containing: * Modifying bid amount due to unforeseen conditions.
- An 'OK' button.

Red arrows point to the PO number, the Revision number, the justification text box, and the OK button.

After you click **OK**, you will be taken to your revised **PO record**. Noticed the Revision number is now 1 and the status is **PNDREV (Pending Revision)**.

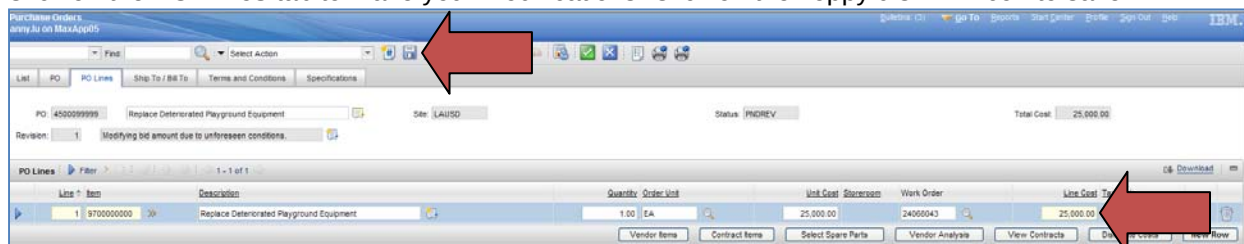


The screenshot shows the 'Purchase Orders' window with the 'PO' tab selected. It displays the following information:

- PO: 4500099999
- Description: Replace Deteriorated Playground Equipment
- Site: LAUSD
- Status: PNDREV
- Revision: 1
- Justification: * Modifying bid amount due to unforeseen conditions.

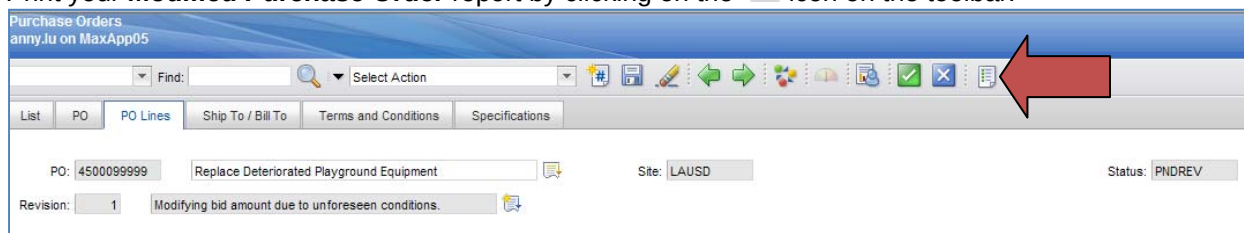
Red arrows point to the PO number, the Revision number, and the Status.

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



The screenshot shows the 'PO Lines' tab selected. It displays a table of PO lines with the following columns: Line #, Item, Description, Quantity, Order Unit, Unit Cost, Extension, Work Order, and Line Cost. The table contains one line item: 1, 9700000000, Replace Deteriorated Playground Equipment, 1.00, EA, 25,000.00, 25,000.00, 24000043, 25,000.00. Red arrows point to the 'PO Lines' tab and the 'Save' button (floppy disk icon).

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



The screenshot shows the 'Purchase Orders' window with the 'PO Lines' tab selected. A red arrow points to the print icon (document with a printer) on the toolbar.



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.: 4500099999 Purchase Req No.: PO Type (from PR or RFQ):
 PO Revision No.: 1 Modifying bid amount due to unforeseen conditions.
 PO Date: 9/4/13 Vendor: 156076 Payment Terms:
 Requested Delivery Date: Freight Terms:
 Contract: Exp Date:

Replace Deteriorated Playground Equipment

Vendor: SAP Vendor: 1000001392 Maximo Vendor: 156076 Name: RACO INDUSTRIES Address: 5480 CREEK RD CINCINATI, OH, 45242 Phone: 800-446-1991 FAX: 509-693-3692 Attention: Danny Lu		Ship To: Name: M&O CENTRAL OFFICE Address: 333 S BEAUDRY AVENUE, 22ND FLOOR LOS ANGELES, CA, 90017 Phone: FAX Attention: Lu, Danny		Bill To:	
--	--	--	--	-----------------	--

#	School Name	G/L Account	Work Order
001	FREMONT SH	CC:0001865001-11731	24068043

Line #	Qty	Units	Item # / Commodity Group	Acct Line	G/L Account / School Name	Description, Mfg, Model, Catalog Code, Notes	Craft	Unit Cost	Tax Code	Line Cost	Total Line Cost
1	1.00	EA	9700000000 97000	001	CC:0001865001-11731	Replace Deteriorated Playground Equipment		25,000.00	0.00	25,000.00	\$25,000.00

The OAR/Line Senior or Designee is responsible for signing the **Modified PO** report. The OAR/Line Senior or Designee to obtain the Director or Designee signature in the **Approved to Modify** line.

Submit the signed **Modified PO** report to **Clerical** for processing and a copy of the report to the contractor.

The Clerical department performs this function.

Go to the **Revised PO** record in the **Purchase Order** application. You may search for it by entering the **PO number** in the search field and click on the  icon. Make sure you are on the **Revised PO**; the status will also be in **PNDREV**.

Purchase Orders
anny.lu on MaxApp05

Find: 4500099999

List PO PO Lines Ship To / Bill To Terms and Conditions Specifications

PO: 4500099999 Replace Deteriorated Playground Equipment Site: LAUSD Status: PNDREV

Revision: 1 amount due to unforeseen conditions. Bypass Contract Revision on PO Approval? ☐



Maximo 7.5 / A/B Letter (Informal Contract) Guide

If you are not on your revised PO record, click on the **List** tab. The result set will display both PO revisions. Select the revision that was submitted to you on the Modified PO report.

Purchase Orders
danny.lu on MaxApp05

Find: [] Select Action []

List [] Lines [] Ship To / Bill To [] Terms and Conditions [] Specifications []

Advanced Search [] Save Query [] Bookmarks []

POs [] Filter [] 1 - 2 of 2

PQ	Revision	Description	Status
=4500099999			
4500099999	0	Replace Deteriorated Playground Equipment	APPR
4500099999	1	Replace Deteriorated Playground Equipment	PNDREV

Select Records []

On the **Revised PO**, click on the change status  icon and select **INTREADY (Ready to Interface)**.

Purchase Orders
danny.lu on MaxApp05

Find: [] Select Action []

List [] PO [] PO Lines [] Ship To / Bill To [] Terms and Conditions [] Specifications []

PO: 4500099999 Replace Deteriorated Playground Equipment Site: LAUSD Status: PNDREV

Revision: 1 Modifying bid amount due to unforeseen conditions. Bypass Contract Revision on PO Approval? []

Select **Ready to Interface** on the **New Status** dropdown and hit **OK**.

Change Status

PO: 4500099999 Replace Deteriorated Playground Equipment

Revision: 1 Modifying bid amount due to unforeseen conditions.

Status: PNDREV Pending Revision

Memo: []

* New Status: Ready to Intef []

* Status Date: 9/4/13 5:27 PM

Memo: []

OK []

The **Modified PO** will interface through the same cycle as before with email notifications. If successful, the **Modified PO** record status will automatically be changed to **APPR**.

List [] PO [] PO Lines [] Ship To / Bill To [] Terms and Conditions [] Specifications []

PO: 4500099999 Replace Deteriorated Playground Equipment Site: LAUSD Status: APPR

Revision: 1 Modifying bid amount due to unforeseen conditions. Bypass Contract Revision on PO Approval? []



19. WORK COMPLETED. OAR/LINE SENIOR OR DESIGNEE OBTAINS SIGNED CONTRACTOR NOTICE OF COMPLETION, RECEIVES VENDOR INVOICE AND RECEIVES LINE ITEM(S) IN RECEIVING APPLICATION.

The OAR/Line Senior or Designee will perform these functions.

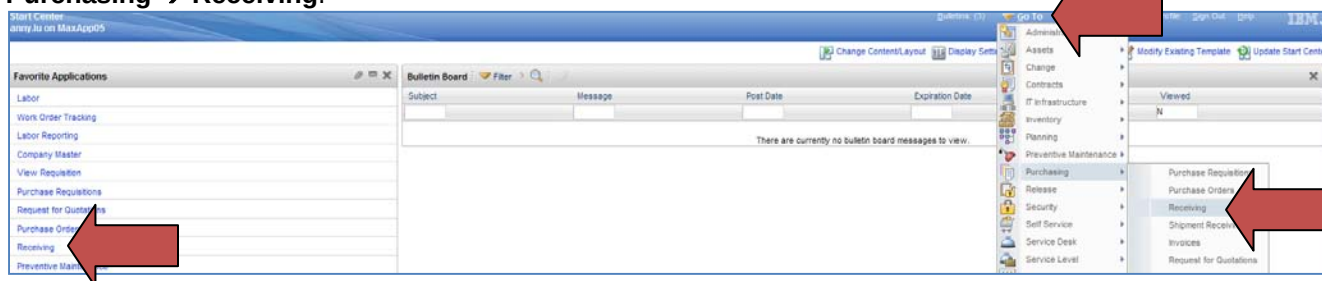
WORK COMPLETED

Verify that the work has been completed. Obtain both the Contractor and District Representative signature on the **Contractor Notice of Completion** document.

INVOICE RECEIVED

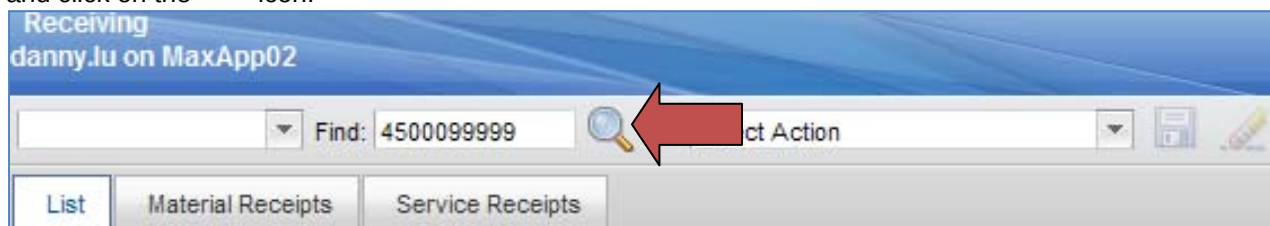
The OAR/Line Senior or Designee will review the Vendor Invoice to ensure all information is correct. If information matches the PO Details Report, proceed with receiving the line in the Receiving application. If the invoice does not match the PO Details Report, modify the PO per step 18.

Go to the **Receiving** application through the Start Center Favorites application or **Go To dropdown** → **Purchasing** → **Receiving**.

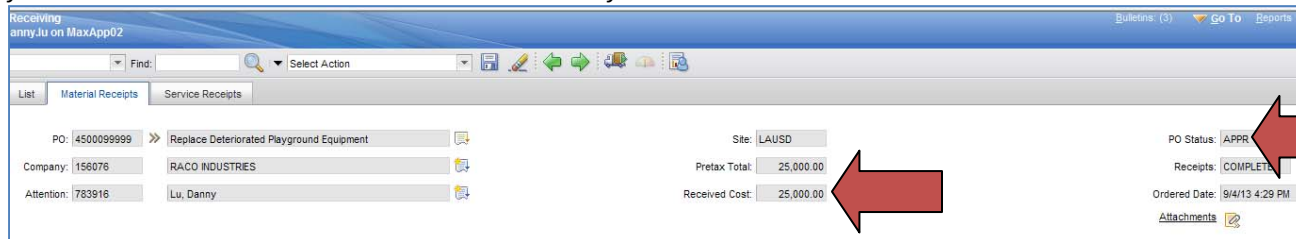


RECEIVING HOME

You will be taken to the **Receiving** home screen. Type in the SAP generated PO number in the find field and click on the  icon.



You will then be taken to the PO record. Make sure you are on the latest PO record. One way to check if you are on the latest is if the Pretax Total matches your invoices as well as the PO Status is **APPR**.





Maximo 7.5 / A/B Letter (Informal Contract) Guide

If you are not on the latest PO record, click on the **List** tab and select the PO that is in the APPR status.

PO	Description	PO Status
=4500099999		
4500099999	Replace Deteriorated Playground Equipment	REVISD
4500099999	Replace Deteriorated Playground Equipment	APPR

On the PO record, click on the **Select Ordered Items** button.

PO: 4500099999 > Replace Deteriorated Playground Equipment
Company: 156076 RACO INDUSTRIES
Attention: 783916 Lu, Danny
Site: LAUSD
Pretax Total: 25,000.00
Received Cost: 0.00
PO Status: APPR
Receipts: NONE
Ordered Date: 5/4/13 4:29 PM
Attachments

Material Receipts Filter > 0 - 0 of 0

PO Line	Item	Description	Quantity	Order Unit	Type	Inv. Status	Actual Date
No items to display.							

Select Receipts to Void Select Items for Return Select Rotating Assets for Return **Select Ordered Items**

A **Select Ordered Items** window will appear. Check the box for each PO Line row and click OK.

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
☒	1 9700000000	Replace Deteriorated Playground Equipment			1.00	1.00	

OK

The PO Line will be returned to the **Materials Receipts** section. Click on the floppy disk icon to save the record. The **Receipts** status will be changed to **COMPLETE**.

PO: 4500099999 > Replace Deteriorated Playground Equipment
Company: 156076 RACO INDUSTRIES
Attention: 783916 Lu, Danny
Site: LAUSD
Pretax Total: 25,000.00
Received Cost: 0.00
PO Status: APPR
Receipts: COMPLETE
Ordered Date: 5/4/13 4:29 PM
Attachments

Material Receipts Filter > 1 - 1 of 1 Download

PO Line	Item	Description	Quantity	Order Unit	Type	Inv. Status	Actual Date
1	9700000000	Replace Deteriorated Playground Equipment	1.00	EA	RECEIPT	COMPLETE	5/4/13 5:09 PM

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



20. COMPLETE CONTRACTOR EVALUATION, OBTAIN SIGNATURE ON PO REPORT AND SUBMIT POST AWARD PACKAGE TO CLERICAL FOR PAYMENT

The OAR/Line Senior or Designee will perform these functions.

CONTRACTOR EVALUATION

Complete the **Contractor Evaluation** form that was printed in the Post Award package. **Note:** If a revise PO (Price Change) was initiated after the PO was created, you will have to re-print the Contractor Evaluation form (AB Letter 27 Contractor Performance Evaluation).

PURCHASE ORDER REPORT

Obtain the “Inspected By,” “Received By,” and “Approved to Pay” signatures on the **Purchase Order** report.

Los Angeles Unified School District		Existing Facilities Maintenance & Operations											
Modified Purchase Order													
PO NO.: 4500099999	Purchase Req No. :	PO Type (from PR or RFQ):											
PO Revision No.: 1	Modifying bid amount due to unforeseen conditions.												
PO Date: 9/4/13	Vendor: 156076	Payment Terms:											
Requested Delivery Date:		Freight Terms:											
Contract:	Exp Date:												
Replace Deteriorated Playground Equipment													
Vendor: SAP Vendor: 1000001392 Maximo Vendor: 156076 Name: RACO INDUSTRIES Address: 5480 CREEK RD CINCINATI, OH, 45242 Phone: 800-446-1991 FAX: 509-693-3692 Attention: Danny Lu		Ship To: Name: M&O CENTRAL OFFICE Address: 333 S BEAUDRY AVENUE, 22ND FLOOR LOS ANGELES, CA, 90017 Phone: FAX Attention: Lu, Danny											
Bill To:													
#	School Name	G/L Account	Work Order										
001	FREMONT SH	CC:0001865001-11731	24068043										
Line #	Qty	Units	Item # / Commodity Group	Acct Line	G/L Account / School Name	Description, Mfg. Model, Catalog Code, Notes	Craft	Unit Cost	Tax Code	Line Cost	Total Line Cost		
1	1.00	EA	9700000000 97000	001	CC: 0001865001-117:	Replace Deteriorated Playground Equipment FREMONT SH		25,000.00	0.00 0%	25,000.00	\$25,000.00		
Total Line Cost (before tax):										\$25,000.00			
Total Tax:										\$0.00			
Total Shipping & Handling:													
PO Total Cost:										\$25,000.00			
_____ danny.lu				_____ Date				_____ Approved to Modify				_____ Date	
_____ Inspected By				_____ Date				_____ Approved to Pay				_____ Date	
_____ Received By				_____ Date									

Submit the completed original **Contractor Performance Evaluation**, a copy of the **signed Purchase Order**, **Notice of Completion**, **A/B Letter Contract** and **Contractor Invoice** to Clerical staff for payment. Make a copy of each document for your personal file.

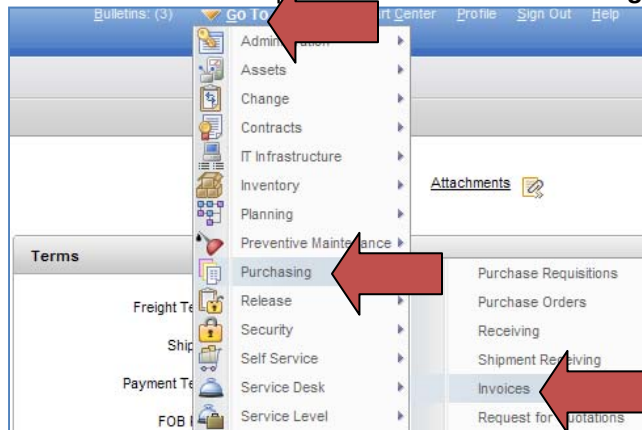


21. CREATE INVOICE RECORD

The Clerical Department performs this function.

Review the completed, **Contractor Evaluation**, signed **Purchase Order**, **Notice of Completion** and **Contractor Invoice** for completeness.

Click on the **Go To** dropdown and select **Purchasing → Invoices**.



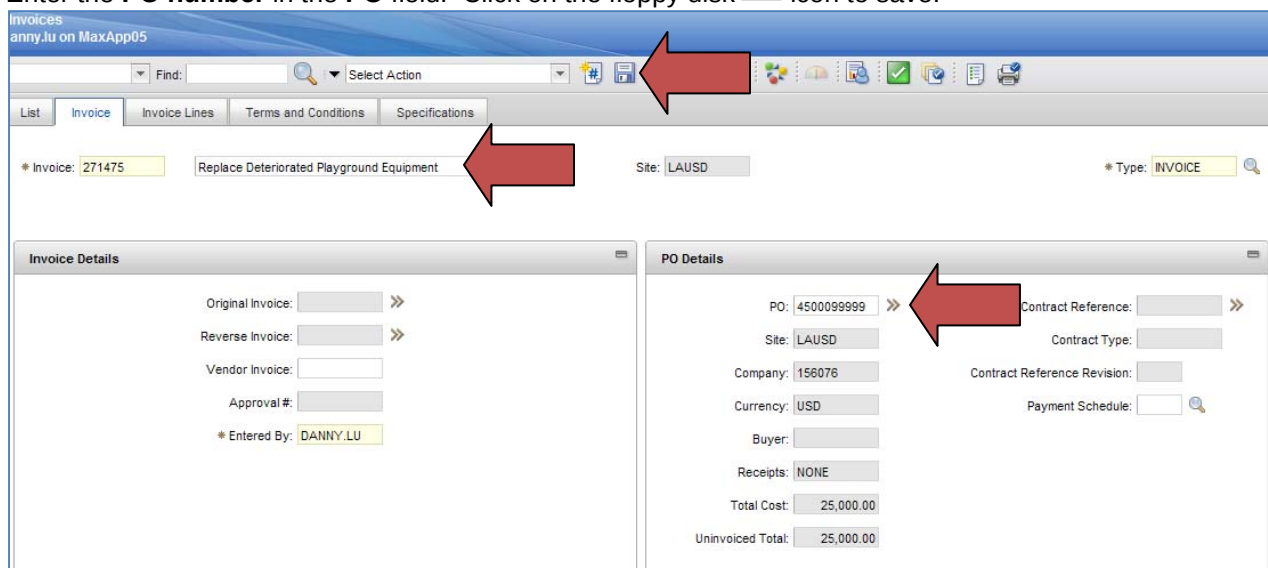
INVOICES HOME

You will be taken to the **Invoices** application. Click on the  icon to create a new **Invoice** record.



A new Invoice number will auto-populate. Type in the same **PO description** in the description box.

Enter the **PO number** in the **PO** field. Click on the floppy disk  icon to save.





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Enter the **Vendor Invoice** number and the **Invoice Date**.

The screenshot shows the 'Invoices' screen for user 'danny.lu on MaxApp07'. The 'Invoice Details' tab is active. The 'Invoice' field contains '271475' and the description is 'Replace Deteriorated Playground Equipment'. The 'Site' is 'LAUSD'. The 'Type' is 'INVOICE'. The 'Status' is 'ENTERED'. The 'Invoice Date' field is highlighted with a red arrow. The 'Dates' section shows 'Entered Date: 9/4/13 5:36 PM' and 'Invoice Date: 9/10/13'. The 'PO Details' section shows 'PO: 4500099999', 'Site: LAUSD', 'Company: 156076', 'Currency: USD', 'Buyer: ', 'Receipts: COMPLETE', 'Total Cost: 25,000.00', and 'Uninvoiced Total: 25,000.00'.

Click on the **Invoice Lines** tab

The screenshot shows the 'Invoices' screen for user 'danny.lu on MaxApp07'. The 'Invoice Lines' tab is active. The 'Invoice' field contains '271475' and the description is 'Replace Deteriorated Playground Equipment'. The 'Site' is 'LAUSD'. The 'Invoice Lines' tab is highlighted with a red arrow.

On the **Invoice Lines** tab, click on the **Copy PO Lines** button.

The screenshot shows the 'Invoices' screen for user 'danny.lu on MaxApp07'. The 'Invoice Lines' tab is active. The 'Invoice' field contains '271475' and the description is 'Replace Deteriorated Playground Equipment'. The 'Site' is 'LAUSD'. The 'Copy PO Lines' button is highlighted with a red arrow.

A **Copy PO Lines** window will appear. Click on the check box for all of the lines that match the invoice and click **OK**.

The screenshot shows the 'Copy PO Lines' window. The 'View all lines' radio button is selected. The 'PO Lines' tab is active. The table shows the following data:

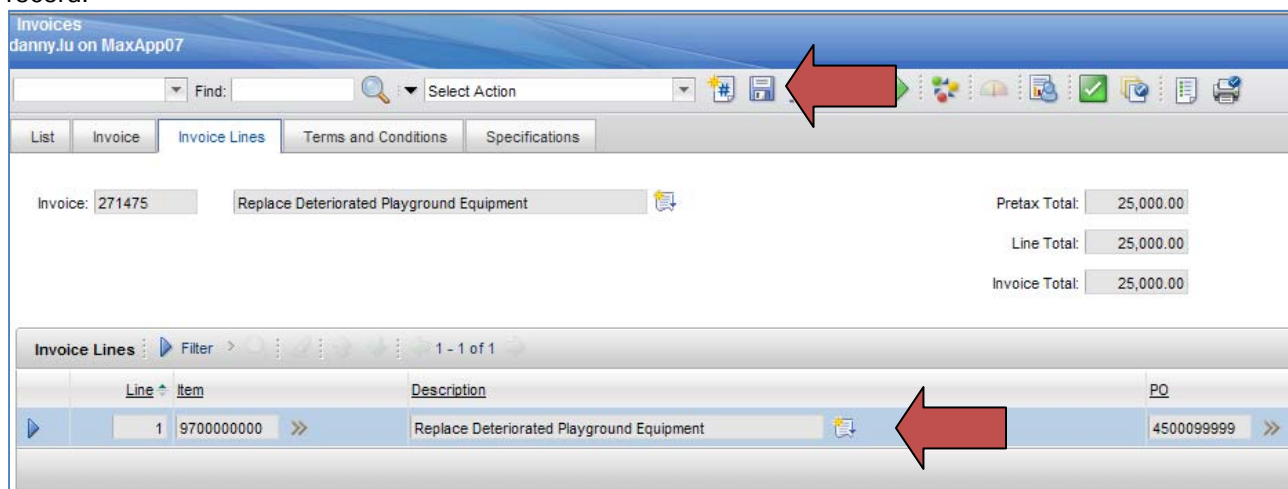
PO	Line	Item	Description	Quantity	Uninvoiced Quantity	Line Cost	Uninvoiced Cost	Site
4500099999	1	9700000000	Replace Deteriorated Playground Equipment	1.00	1.00	25,000.00	25,000.00	LAUSD

The 'Copy PO Lines' button is highlighted with a red arrow. The 'OK' button is also highlighted with a red arrow.



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The line will be returned to the **Invoice Lines** section. Click on the floppy disk  icon to save the record.



Invoices
danny.lu on MaxApp07

Find: [] Select Action []

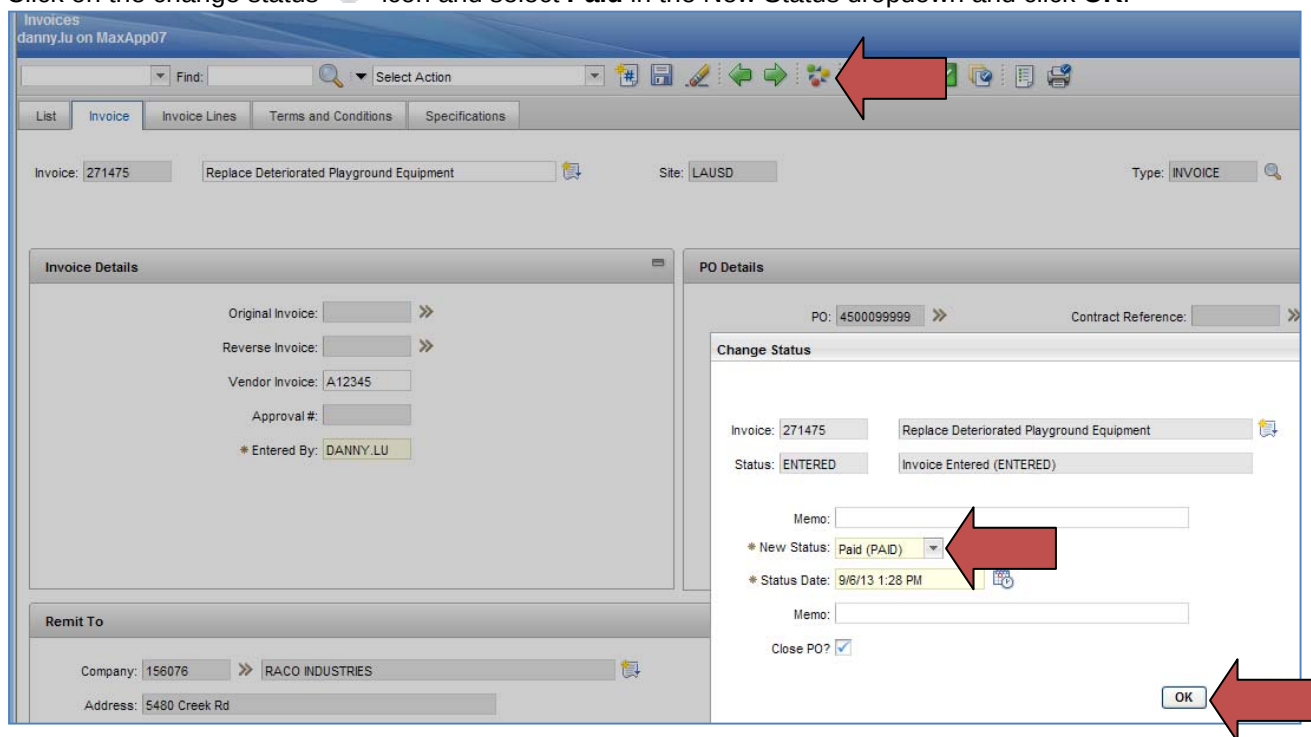
List Invoice **Invoice Lines** Terms and Conditions Specifications

Invoice: 271475 Replace Deteriorated Playground Equipment Pretax Total: 25,000.00
Line Total: 25,000.00
Invoice Total: 25,000.00

Invoice Lines Filter 1 - 1 of 1

Line	Item	Description	PO
1	9700000000	Replace Deteriorated Playground Equipment	4500099999

Click on the change status  icon and select **Paid** in the New Status dropdown and click **OK**.



Invoices
danny.lu on MaxApp07

Find: [] Select Action []

List Invoice Invoice Lines Terms and Conditions Specifications

Invoice: 271475 Replace Deteriorated Playground Equipment Site: LAUSD Type: INVOICE

Invoice Details

Original Invoice: []
Reverse Invoice: []
Vendor Invoice: A12345
Approval #: []
Entered By: DANNY.LU

PO Details

PO: 4500099999 Contract Reference: []

Change Status

Invoice: 271475 Replace Deteriorated Playground Equipment
Status: ENTERED Invoice Entered (ENTERED)

Memo: []

* New Status: Paid (PAID)
* Status Date: 9/6/13 1:28 PM

Memo: []

Close PO? ☒

OK

Note: The status of the Purchase Order in Maximo will automatically be changed to **CLOSE**.

Submit the **Contractor Evaluation** to Angela Worshim-McCloud (angela.worshim@lausd.net)

Submit the **signed Purchase Order, Notice of Completion, A/B Letter Contract** and **Contractor Invoice** to Accounts Payable for payment.

Should you have any questions on this guide, please contact Danny Lu (danny.lu@lausd.net / 213-241-0573), Mark Merrick (mark.merrick@lausd.net / 213-241-0334), or John Herweg (john.herweg@lausd.net / 213-241-6271).