

Los Angeles Unified School District

AWMS Procurement Working Group

Release Reserved Items from Stores Inventory

LAUSD Maintenance and Operations Release Reserved Items from Stores Inventory in AWMS

OVERVIEW

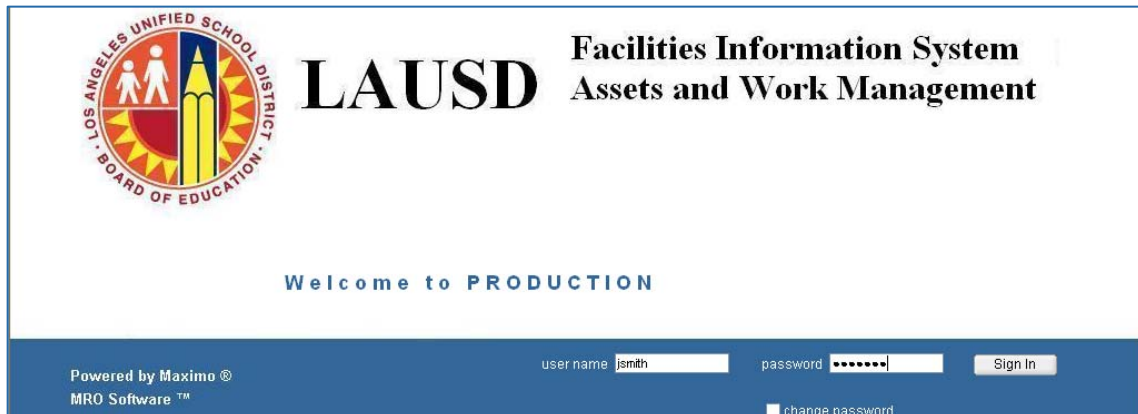
The Head Stock Clerk will run the Outstanding Reserved Items Report periodically to check for and delete outstanding reserved items against AWMS Work Orders in the Status of Closed (CLOSE) and Cancelled (CAN). In addition, the Head Stock Clerk will use these instructions to determine the best course of action to take to release outstanding reservations **that are not current** against Work Orders in all other Statuses.

1. NAVIGATE TO ISSUES AND TRANSFERS

The Head Stock Clerk or Designee will perform this function

Logging In

Log In to AWMS using your User Name and Password.



Start Center

AWMS opens to the **Start Center**.

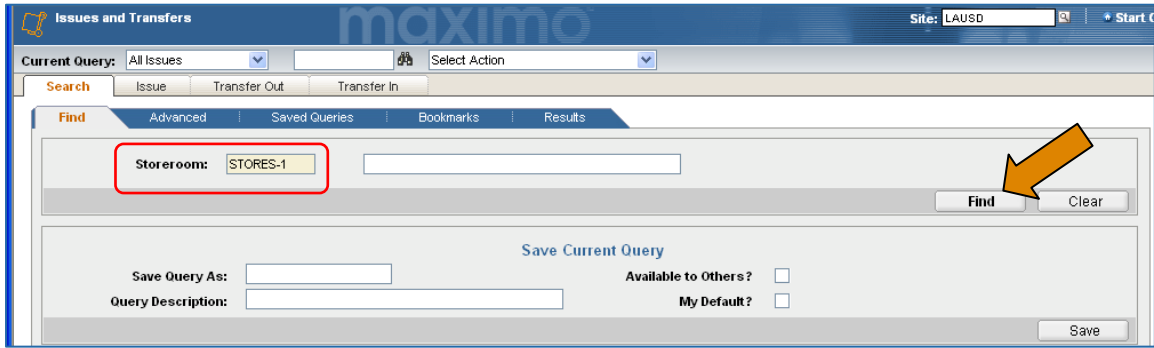
- Hover the mouse over the Inventory module until the dropdown menu appears.
- Click on Issues and Transfers.



Find

The Issues and Transfers Find screen opens.

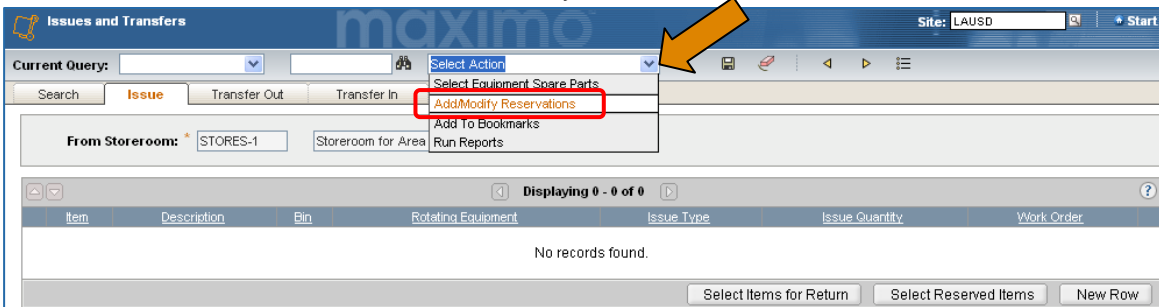
- Enter the Storeroom in the Storeroom field.
- Click on the Find button or hit Enter on the keyboard.



Select Action

The Issue tab screen for the selected Storeroom opens.

- Click on Select Action.
- Choose Add/Modify Reservations.



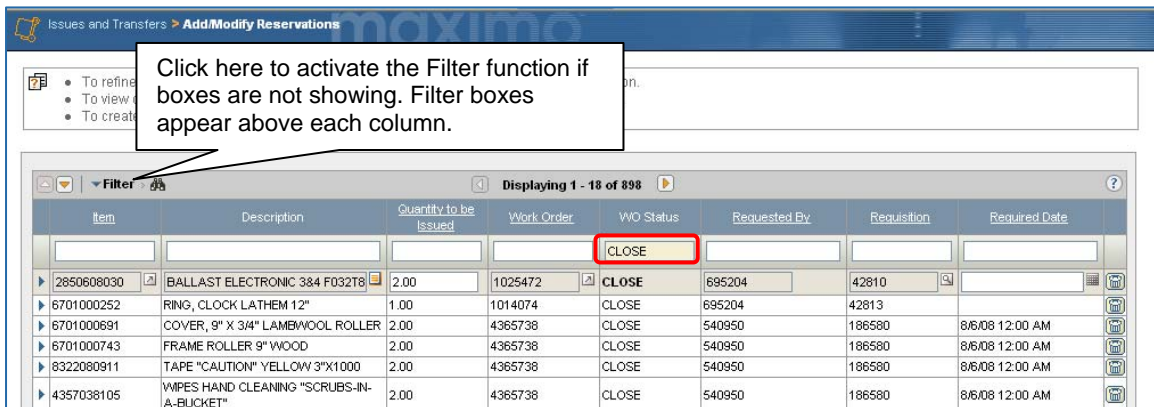
2. FILTER FOR REQUISITIONS AGAINST WORK ORDERS IN THE STATUS 'CLOSE'

The Head Stock Clerk or Designee will perform this function

Filter

The Reserved Items appear. To Filter for items reserved on Closed Work Orders:

- Type CLOSE in the Filter box appearing in the WO Status column.
- Hit Enter on the keyboard.




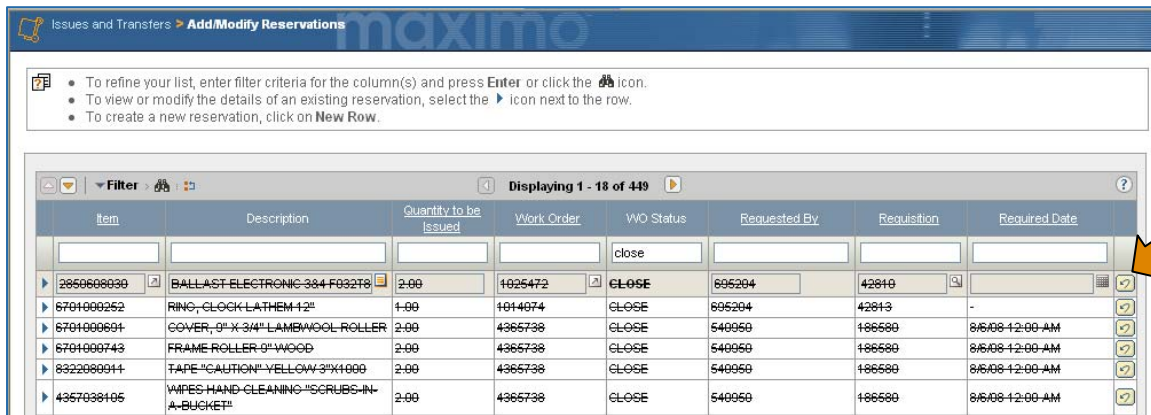
3. DELETE THE ITEMS

The Head Stock Clerk or Designee will perform this function



Delete




The Filtered list of Closed Work Orders appears. To delete the line items:







- Click on the Trash Can icon  located at the right of each line item.
- A line will appear through the line item.
- When all line items are marked for deletion, click OK.
- **Save** the record.
- The reserved items are removed from Stores Inventory.



Issues and Transfers > Add/Modify Reservations

• To refine your list, enter filter criteria for the column(s) and press **Enter** or click the  icon.
 • To view or modify the details of an existing reservation, select the  icon next to the row.
 • To create a new reservation, click on **New Row**.

Filter    **Displaying 1 - 18 of 449**


Item	Description	Quantity to be Issued	Work Order	WO Status	Requested By	Requisition	Required Date	
2850608030	BALLAST-ELECTRONIC-384-F032T8	2.00	1025472	CLOSE	695204	42840		
6701000262	RING, CLOCK-LATHEM 1/2"	1.00	1014074	CLOSE	695204	42843	-	
6701000691	COVER, 9" X 3/4" LAMB/WOOL-ROLLER	2.00	4365738	CLOSE	540950	186580	8/6/08 12:00 AM	
6701000743	FRAME-ROLLER 9" WOOD	2.00	4365738	CLOSE	540950	186580	8/6/08 12:00 AM	
8322080914	TAPE "CAUTION" YELLOW 3"X1000	2.00	4365738	CLOSE	540950	186580	8/6/08 12:00 AM	
4367030105	WIPES-HAND-CLEANING "SCRUBS-IN-A-BUCKET"	2.00	4365738	CLOSE	540950	186580	8/6/08 12:00 AM	

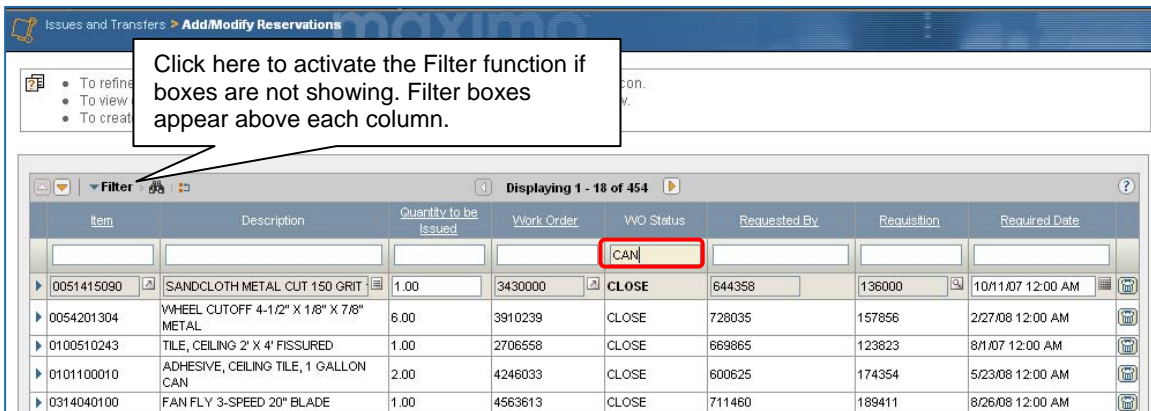
4. REPEAT THE SAME PROCESS FOR RESERVED ITEMS AGAINST WORK ORDERS IN THE STATUS 'CAN' OR CANCELLED

The Head Stock Clerk or Designee will perform this function

Filter

In the same results set screen:




- In the WO Status Filter box, type CAN for Cancelled.
- Hit Enter on the keyboard.
- The screen will present a new list of items against Work Orders in the Status of 'CAN'.
- Delete the line items using the Trash Can  icon.
- Save the record.








Issues and Transfers > Add/Modify Reservations

• To refine
 • To view
 • To creat

Click here to activate the Filter function if boxes are not showing. Filter boxes appear above each column.

Filter    **Displaying 1 - 18 of 454**

Item	Description	Quantity to be Issued	Work Order	WO Status	Requested By	Requisition	Required Date	
0051415090	SANDCLOTH METAL CUT 150 GRIT	1.00	3430000	CAN	644358	136000	10/11/07 12:00 AM	
0054201304	WHEEL CUTOFF 4-1/2" X 1/8" X 7/8" METAL	6.00	3910239	CLOSE	728035	157856	2/27/08 12:00 AM	
0100510243	TILE, CEILING 2' X 4' FISSURED	1.00	2706558	CLOSE	669865	123823	8/1/07 12:00 AM	
0101100010	ADHESIVE, CEILING TILE, 1 GALLON CAN	2.00	4246033	CLOSE	600625	174354	5/23/08 12:00 AM	
0314040100	FAN FLY 3-SPEED 20" BLADE	1.00	4563613	CLOSE	711460	189411	8/26/08 12:00 AM	

5. INVESTIGATE RESERVATIONS AGAINST WORK ORDERS IN ALL OTHER STATUSES

The Head Stock Clerk or Designee will perform this function

Filter

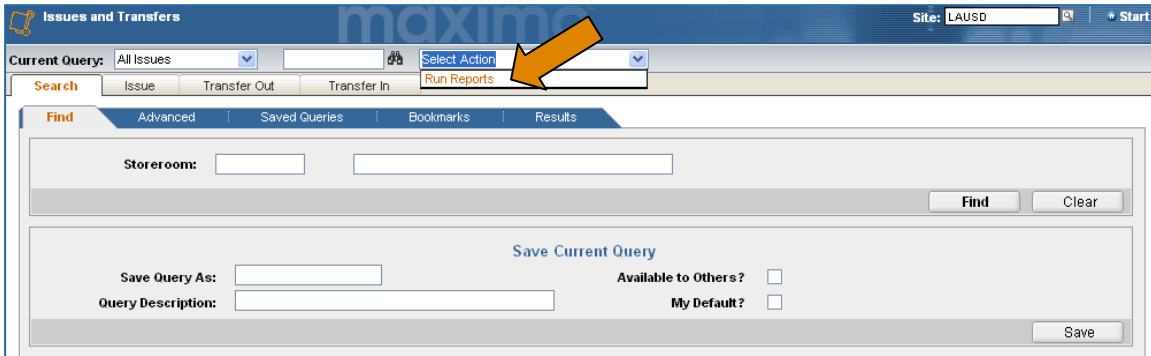
For those remaining reservations, run the Outstanding Reserve Items Report using the Labor Group filter for each Craft (see instructions that follow.)

- Distribute the lists to the Crafts. The weekly Book Meeting would be an excellent forum for this task to engage the Director and the Crafts together.
- Set a reasonable time limit for the Crafts to review their requisitions before the listed reservations **that are not current** are deleted from Stores Inventory (Issues and Transfers).

Run Reports

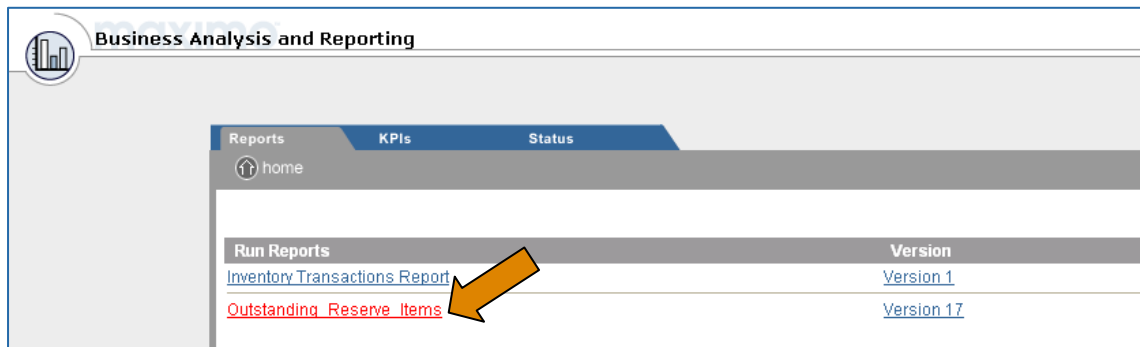
Log in to AWMS and Navigate to Inventory - Issues and Transfers:

- Click on Select Action, Run Reports



Choose Report

Click on Outstanding Reserve Items.



Parameters

Fill in the Report Parameters for the first Craft:

- The sample shows Area 1 Plumbing, e.g. 1-GA in the Labor Group field.
- Click on the Submit button.

Report

The Outstanding Reserve Items Report appears filtered for Plumbing:

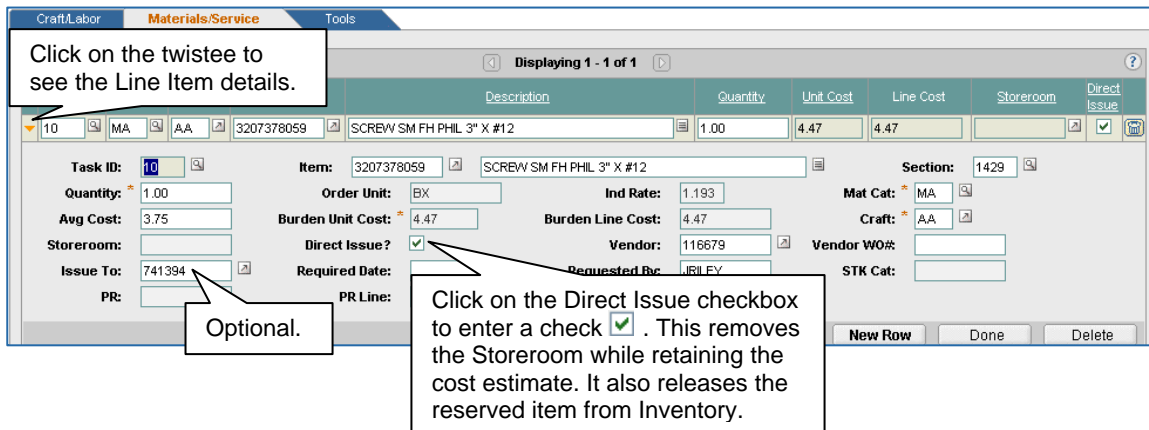
- Repeat the same process for each Craft.


Labor Group	Requested By Employee #/ Name	Reserved Item Number	Item Description	Qty Left to be Issued	Work Order #	Sys Work Call Order VIII Status	Task ID	Desktop Req #	Inventory Location	Required Date
I-GA	644358 Cakke II, David W.	6705223905	CLAMP CUSH 7.6" O.D.	4	3708430	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	2002755094	GLOVES G-TEK NITRILE COATED X-LARGE SIZE	4	3708450	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	6894238122	ELBOW COPPER 3/4" 45" STREET	6	3708450	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	6894238125	ELBOW COPPER 3/4" 45"	6	3708450	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	6700613000	TAPE TEFLON 12X520 4MIL	12	3708430	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	6883880080	PIPE COPPER 3/4" TYPE L	2	3708450	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	3207145005	SCREW LAG 5/16 X 2"	20	3708430	N COMP	144807		STO RES-1	12/3/2007
I-GA	644358 Cakke II, David W.	0756652160	RUST PREVENTATIVE WIDIOS AEROSOL SPRAY	2	2858319	N COMP	147453		STO RES-1	12/19/2007
I-GA	644358 Cakke II, David W.	6892768555	CAP GALV 3/4"	3	4724591	N COMP	197860		STO RES-1	10/10/2008
I-GA	644358 Cakke II, David W.	6700613000	TAPE TEFLON 12X520 4MIL	2	4724591	N COMP	197860		STO RES-1	10/10/2008
I-GA	644358 Cakke II, David W.	6706325180	BOX YARD PLASTIC WATER RECTANGULAR	1	4724591	N COMP	197860		STO RES-1	10/10/2008
I-GA	644358 Cakke II, David W.	6705530200	TOILET TANK TYPE ELONGATD BOWL DNR	1	4850968	N COMP	207358		STO RES-1	12/9/2008
I-GA	644358 Cakke II, David W.	6896036784	NIPPLE BRASS 3/4" X 1/2"	4	4850968	N COMP	208096		STO RES-1	12/15/2008
I-GA	644358 Cakke II, David W.	6896036692	NIPPLE BRASS 3/4" X CLOSE	4	4850968	N COMP	208096		STO RES-1	12/15/2008
I-GA	644358 Cakke II, David W.	2002755094	GLOVES G-TEK NITRILE COATED X-LARGE SIZE	2	4850968	N COMP	208096		STO RES-1	12/15/2008

6. COMMUNICATE WITH THE CRAFTS TO DISCOVER THE BEST ACTION TO TAKE TO RESOLVE THE OUTSTANDING RESERVATIONS

Consider the following scenarios:

- a. Were the items received by the Craft, but never issued in Maximo?
 - Yes – The Head Stock Clerk will issue the items.
 - No – proceed to the next question.
- b. Is this is a requisition that was overlooked and none of the items were ever issued?
 - Yes. Are the items still needed?
 - Yes – the items are still needed. The Craft will print and submit the requisition in the normal manner.
 - No – the items are no longer needed. Are the items on a Stock Material Requisition or a Desktop Requisition?
 - *Stock Material Requisition:* For items on a Planned Job, the Craft will navigate to the Materials Service tab of the Work Order. Click on the Direct Issue box of the line item to maintain the integrity of the estimate and remove the reservation from the Storeroom.



For items on Service Calls, the Craft will delete the items in the Materials/Service tab using the trash can icon  at the right end of the line item. Save the record.

- *Desktop Requisition:* The Craft will change the Status of the requisition to Cancelled (CAN).
- No. This is not an overlooked requisition, none of the scenarios mentioned here apply, and there are still outstanding reservations which are not current; contact Kermit Perry at (213) 241-4631

The process is complete.