

Los Angeles Unified School District

**AWMS Procurement  
Buyer Card Requisition (BC)**

**AWMS Buyer Card Material Requisition  
Table of Contents**

<b>NON-ANNUAL CONTRACT (&lt;\$2,500)</b>
Page 1-10
<b>ANNUAL CONTRACT ( Up to \$100,000)</b>
Page 1-10
<b>NON-ANNUAL CONTRACT (\$2,500-\$78,900)</b>
Page 11-29

## LAUSD AWMS Maintenance and Operations Buyer Card Requisition (BC) Process Guide

### DEFINITION

The Buyer Card is an alternative expedited method to purchase materials and/or services not available from local M&O Area Stores or the General Stores Warehouse. There are four different processes associated with using the Buyer Card:

- Purchases under **\$2,500** that are not under the District's Annual Contract.
- Purchases between **\$2,500** and **\$24,999** that are not under the District's Annual Contract.
- Purchases between **\$25,000** and **\$78,900** that are not under the District's Annual Contract.
- Purchases up to **\$100,000** that are under the District's Annual Contract.

All vendors must accept MasterCard as payment.

### OVERVIEW

The Buyer Card process is a derivative of two existing processes in Maximo:

- A. The Purchase Requisition/Purchase Order (PR/PO) process
- B. The Request for Quotation (RFQ) process.

Which option to use (A or B) is determined by the monetary threshold and whether the item/service is available on an Annual Contract.

#### A. NON-ANNUAL CONTRACT (<\$2,500) / ANNUAL CONTRACT (up to \$100,000)

##### 1. CREATE PURCHASE REQUISITION

*The Requestor will perform this function.*

**Login**      **Login to AWMS using your User Name and Password\*.**

LAUSD Facilities Information System  
Assets and Work Management

Welcome to PRODUCTION

Powered by Maximo ©  
MRO Software™

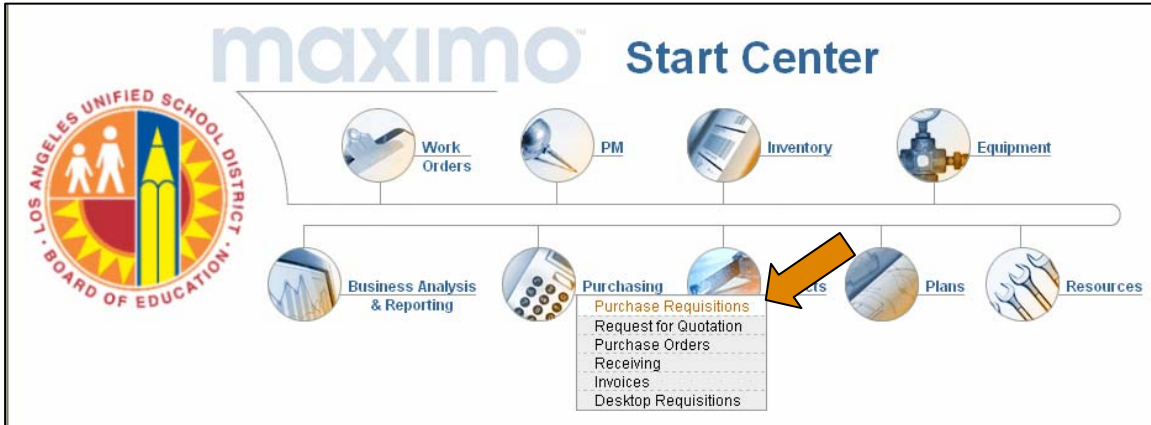
user name  password

change password

BUYER CARD REQUISITION

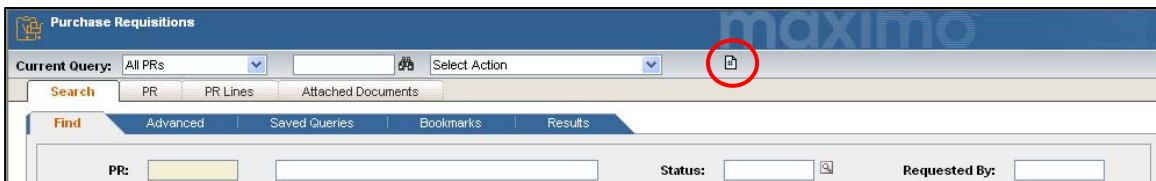
**Start Center** The **Start Center** opens.

- Hover your pointer over the **Purchasing** module.
- Select **Purchase Requisition** from the dropdown menu.



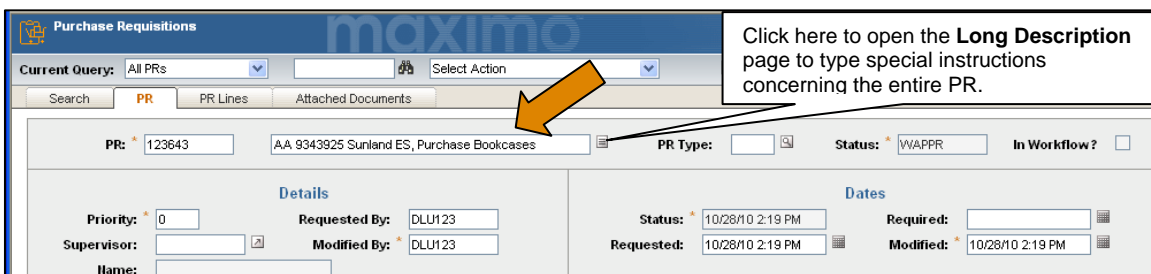
**New PR** The **Purchase Requisition Find** screen appears.

- Click on the **AWMS New PR** icon  in the AWMS toolbar.
- 



**Description** AWMS generates a new **AWMS PR number** (Purchase Requisition in the status **Waiting for Approval (WAPPR)**).

- Name the AWMS PR in the **Description** field using the following naming convention: 2 Letter Craft Code (space) Work Order Number (space) School Site (i.e., AA 534868 Sunland ES).
- If you would like to add an additional comment to the Description field, separate the additional comment from the naming convention by a comma, and type your additional comment directly into the Description field (i.e., AA 534868 Sunland ES, Replace Doors).
- Click on the **Long Description** button to add any special instructions for the PR. Type '**Special Instructions**' and all the text that follows will print in the Special Instructions section of the Quote Sheet.



BUYER CARD REQUISITION

**PR Type** Type **BC** or click on the **Lookup** icon next to the **PO Type** field and select **BC (Buyer Card)**.

**Supervisor** Enter the **employee number** of your supervisor

**Company** Enter the **vendor number** of the company whom you wish to purchase the supplies/services. If a vendor number is not available, please contact your clerical staff to create a temporary vendor number.

**Contract #** **Annual Contract (up to \$100,000) ONLY.** Enter the **LAUSD Contract #** associated with the company whom you wish to purchase the supplies/services.

**Ship To** In the **Ship To** section:

- Click in the **Name** field and type the four-digit **Org.Code** of the location the materials will be shipped to.
- Click out of the field, and the information auto-populates.

**Bill To** In the **Bill To** section:

- Click in the **Name** field and type the four-digit **Org.Code** of the location the materials will be shipped to.
- Click out of the field, and the information auto-populates.

**Attention** **Optional** field.

- This field may be left **blank**.
- The two-letter **Craft Code** (AA, GA, EA, etc.) may be used to indicate a position.
- A **Labor Code** (employee number) may be entered to indicate an employee.

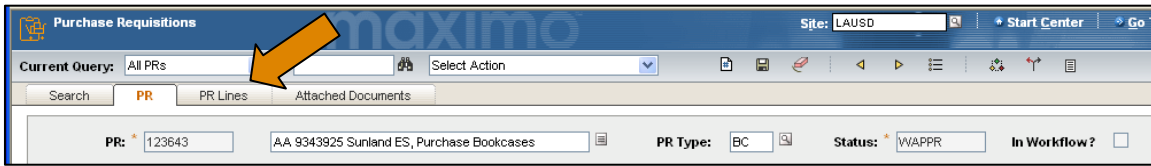
**Save** Click on the floppy disk icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, "**Record has been saved.**"

The screenshot shows the Maximo Purchase Requisitions form with several callout boxes pointing to specific fields:

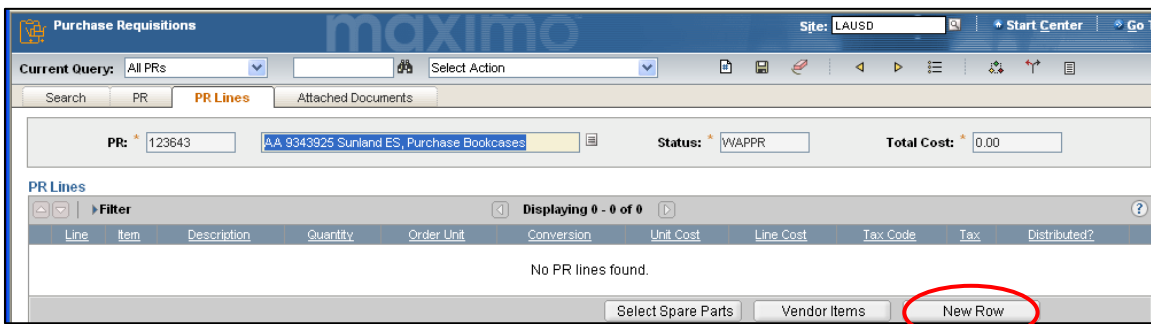
- Supervisor employee number:** Points to the Supervisor field containing '783916'.
- Vendor Number:** Points to the Company field containing '108045'.
- Contract Number (Annual Contracts Only):** Points to the Contract # field.
- Ship To location number:** Points to the Name field in the Ship To section containing '1421'.
- Bill To location number:** Points to the Name field in the Bill To section containing '1421'.
- BC as the PR Type:** Points to the PR Type dropdown menu.
- Save:** Points to the floppy disk icon in the Maximo toolbar.

**2. CREATE THE AWMS PR LINE ITEMS.**

**RFQ Lines** Click on the **PR Lines** tab.

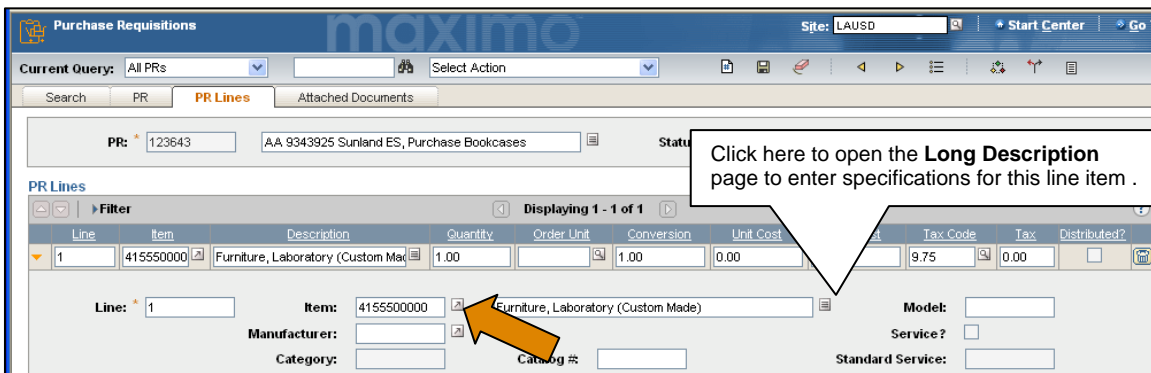


**New Row** Click on **New Row** to create the first **PR Lines** item.



**Item** Enter a **Commodity Code** in the **Item** field and click outside the field. The item description auto-populates.

- Overtyping the description to match what is being ordered. (The description should be enough information for the Buyer Card holder to place the order.)
- The **Long Description** of the **line item** may be used for items requiring lengthy specifications. Specifications listed here will print together with the line item description.



**Fill In** Enter the following details for requisition line.

- **Quantity** and **Order Unit**.
- **Work Order Number**
- Verify that the **Location**, **Section**, and **GL Debit Account** are populated.

BUYER CARD REQUISITION

The screenshot shows the Maximo Purchase Requisitions interface. At the top, the 'Current Query' is 'All PRs'. The 'PR Lines' tab is active, showing a table with one line item. Below the table, the details for Line 1 are displayed. Callouts point to the following fields:

- Quantity/Order Unit:** Points to the 'Quantity' field (1.00) and the 'Order Unit' dropdown (EA).
- Work Order Number:** Points to the 'Work Order' field (9343925).
- Unit Cost:** Points to the 'Unit Cost' field (50.00).

Other visible fields include 'PR: 123643', 'AA 9343925 Sunland ES, Purchase Bookcases', 'Status: WAPPR', and 'Total Cost: 54.88'. The interface also shows a 'Filter' section and a 'Displaying 1 - 1 of 1' indicator.

Repeat steps if you are ordering more than one item.

**Save** Click on the floppy disk icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, **“Record has been saved.”**

**3. PRINT THE PURCHASE REQUISITION REPORT**

Click on **Select Action** and choose **PR Details Report** from the dropdown list.

The screenshot shows the Maximo Purchase Requisitions interface with the 'Select Action' dropdown menu open. The menu options are:

- Change Status
- Route PR
- Stop Workflow
- View Status/Workflow History
- View Workflow Help
- Create PO
- Add/Modify Order Unit Values
- Add/Modify Standard Services
- Run Reports
- PR Details Report** (highlighted with an orange arrow)
- Print with Attachments
- Duplicate Purchase Requisition
- Add To Bookmarks

The background shows the same PR line details as the previous screenshot, with the 'Status' now set to 'APPR' and 'Total Cost' at '54.88'. An orange arrow also points to the 'Select Action' dropdown button.

BUYER CARD REQUISITION

**Print Report** Click on the **Print** icon in the AWMS toolbar to print the Report.

Reporting  
Pages: 1 of 1

Los Angeles Unified School District  
Facilities Services Division - Existing Facilities

**Purchase Requisition**

PR NO.: 123643 PR Type: BC PR Issue Date: 10/28/2010

School Name: LAUSD HQ Loc Code: 0656  
Requested Delivery Date: Payment Terms:  
Freight Terms:

Requester: DLU123 Responsible Person: Lu, Danny  
PR Modified By: DLU123 Area Region: M&O CENTRAL  
Contract: Exp Date:

**AA 9343925 Sunland ES, Purchase Bookcases**

Vendor	Ship To	Bill To
Vendor Code: 102041 Name: HARRY T WILLIAMS LUMBER CO Address: P O BOX 5337 TORRANCE, CA 90510 Phone: 310-787-3295 Fac: Attention: BEN FELLMAN	Name: M&O MAINTENANCE CENTRAL 3 Address: 1500 E 14th Street LOS ANGELES, CA 90021 Phone: 213-783-3045 Fac: Attention: Lu, Danny	

LINE #	QTY	UNITS	ITEM #	Acct Description, Mfg. Model, Catalog Code, Note	Unit Cost	Tax	Line Cost	Total Line Cost	
001	1.00	EA	415550000	Furniture, Laboratory (Custom Made)	50.00	4.88	50.00	\$54.88	
								Total Line Cost (before tax):	50.00
								Total Tax:	\$4.88
								Total Shipping & Handling:	0.00
								<b>PR Total Cost:</b>	<b>\$54.88</b>

P.R. Approvals:

Requester: \_\_\_\_\_ Date: 10/28/2010 3:17:10 PM  
Approved By: \_\_\_\_\_ Date: \_\_\_\_\_  
P.O.: \_\_\_\_\_ Signature / Title Date: \_\_\_\_\_

Obtain the required signature: Non-Annual Contract: **CPM**; Annual Contract: **CPM** for purchases up to \$5,000; **AFSD** for \$5,001-\$10,000; **LDFD** for \$10,001-\$100,000. Submit report to the **Buyer Card holder** for processing.

**4. PROCESS ORDER IN PROCHARGE, HAND WRITE PROCHARGE TRANSACTION # ON PR REPORT, RECONCILE PURCHASE, APPR PR AND CREATE PO**

*The Buyer Card holder will perform these functions.*

Hand writes the ProCharge transaction number on the PR Report. Reconcile original PR report with Purchase Receipt from ProCharge. If amount is different, update PR lines to match receipt amount and create Purchase Order.

Click on the change status icon and select **Approved** from the dropdown list and click **OK**.

Purchase Requisitions  
Loading...

Site: LAUSD Start Center Go To

Current Query: All PRs Select Action

Search PR PR Lines Attached Documents

PR: 123643 AA 9343925 Sunland ES, Purchase Bookcases Status: WAPPR Total Cost: 54.88

PR Lines  
Filter  
Displaying 1 - 1 of 1

Line	Item	Description	Quantity	Order Unit	Conversion	Unit Cost	Line Cost	Tax Code	Tax	Distributed?
1	415550000	Furniture, Laboratory (Custom Ma	1.00	EA	1.00	50.00	50.00	9.75	4.88	

Change Status

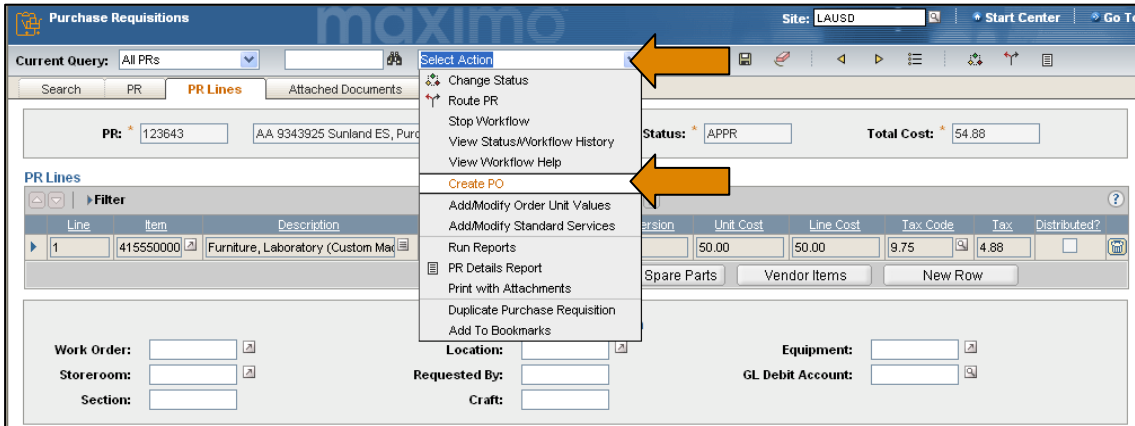
PR: 123643 Description: AA 9343925 Sunland ES, Purchase Bookcases  
Current Status: WAPPR

New Status: Approved (APPR)  
Date Changed: 10/28/10 3:06 PM  
Memo:

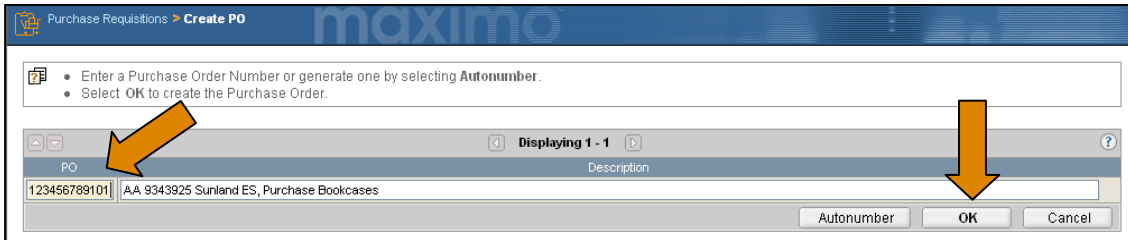
OK Cancel

BUYER CARD REQUISITION

Click on **Select Action** and choose **Create PO** from the dropdown list.




Enter **ProCharge Transaction #** as the Purchase Order number and click **OK**.



**APPROVE PO** To Approve the PO in AWMS, from the **Start Center**:

- Hover the pointer over the **Purchasing** module.
- Choose **Purchase Orders**.

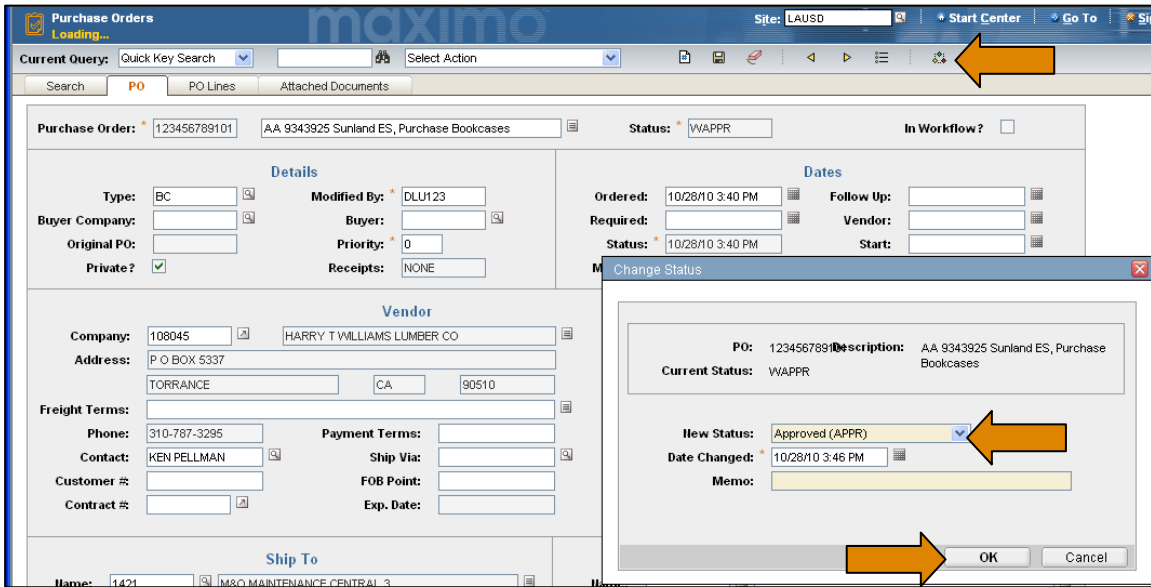


Enter the Purchase Order number in the top search field and click on the 



BUYER CARD REQUISITION

Click on the change status  icon and select **Approved** from the dropdown list and click **OK**.



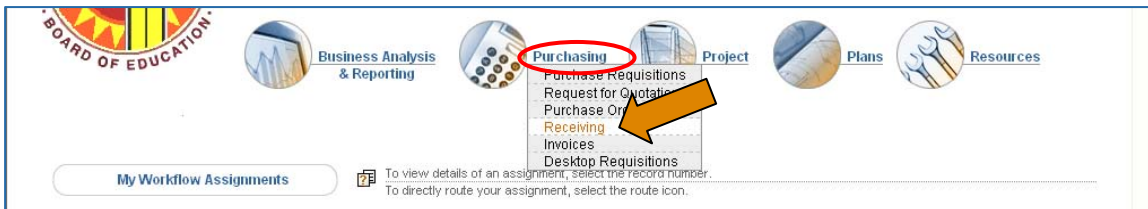
Submit **PR Report** and **Purchase Receipt** to Stores personnel.


5. **ORDER RECEIVED, STORES TO RECEIVE LINE ITEM IN RECEIVING APPLICATION AND SUBMIT RECEIPT/PACKING LIST TO BUYER CARD HOLDER**

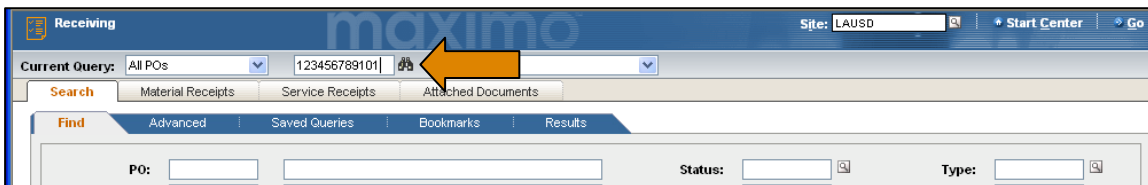
*The Stores personnel will perform these functions.*

**Receiving** To Receive the Line Items in AWMS, from the **Start Center**:

- Hover the pointer over the **Purchasing** module.
- Choose **Receiving**.



Enter the **ProCharge Transaction #** in the top search field and click on the 



BUYER CARD REQUISITION

**Select** In the **Receiving** screen that appears, click on the **Select Ordered Items** button.

The screenshot shows the Maximo Receiving interface. At the top, there are search and navigation options. Below that, there are fields for PO number (123456789101), Vendor (108045), and Ship to Attention (783916). The PO Status is APPR, and the Receipt Status is NONE. The Ordered Cost is 50.00, and the Received Cost is 0.00. The Ordered Date is 10/28/10 3:40 PM. A table below shows 'Material Receipts' with a filter and a message 'No material receipts found.' At the bottom, there are three buttons: 'Select Items for Return', 'Select Ordered Items' (circled in red), and 'New Row'.

**Items** Click in the selection boxes to select the items received. The top checkbox selects all items. Click **OK** when the items received have been selected.

The screenshot shows the 'Select Ordered Items' dialog box. It has a 'Store room' field and a 'Find' button. Below that, there is a table with columns: Line, Item, Description, Packing Slip #, Store room, Quantity Due, Quantity Ordered, Invoice, and Remarks. The first row is checked, and the 'ALL Line Items' checkbox is also checked. A callout box points to the 'ALL Line Items' checkbox with the text 'Click here to select ALL Line Items.' At the bottom, there are 'OK' and 'Cancel' buttons, with the 'OK' button circled in red.

**Save** Click on the **Save** icon in the AWMS toolbar. **Saving** the record changes the **Receipt Status** to **COMPLETE**.

The screenshot shows the Maximo Receiving interface after saving. The 'Save' icon in the toolbar is circled in red. The 'Receipt Status' field is now 'COMPLETE'. The 'Ordered Cost' is now 50.00, and the 'Received Cost' is also 50.00. The 'Ordered Date' is 10/28/10 3:40 PM. The table below shows 'Material Receipts' with one row displayed, which is checked. At the bottom, there are three buttons: 'Select Items for Return', 'Select Ordered Items', and 'New Row'.

**COMPLETE** Receipt Status is **COMPLETE**.

Stores to submit **PR Report**, **Purchase Receipt** and **Packing Slip** to Buyer Card Holder.


BUYER CARD REQUISITION

**6. CLOSE PO, RECONCILE AND UPLOAD DOCUMENTS TO PROCHARGE**


The Buyer Card holder to perform these functions.

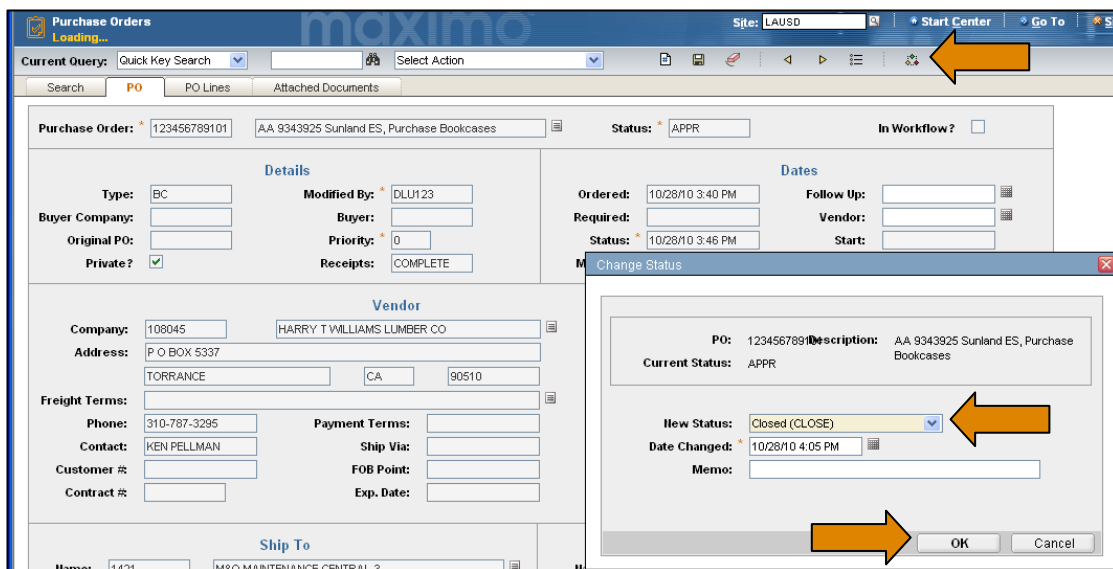
- CLOSE PO** To Close the PO in AWMS, from the **Start Center**:
- Hover the pointer over the **Purchasing** module.
  - Choose **Purchase Orders**.



Enter the Purchase Order number in the top search field and click on the 



Click on the change status  icon and select **Close** from the dropdown list and click **OK**.



Reconcile purchase and upload all documents to ProCharge application.

**B. NON-ANNUAL CONTRACT (\$2,500>\$78,900)**

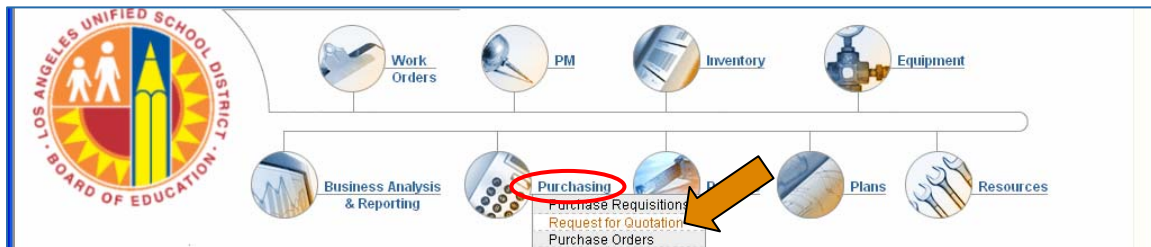
**1. CREATE REQUEST FOR QUOTATION**

*The Requestor will perform this function.*

**Login** Login to AWMS using your **User Name** and **Password\***.

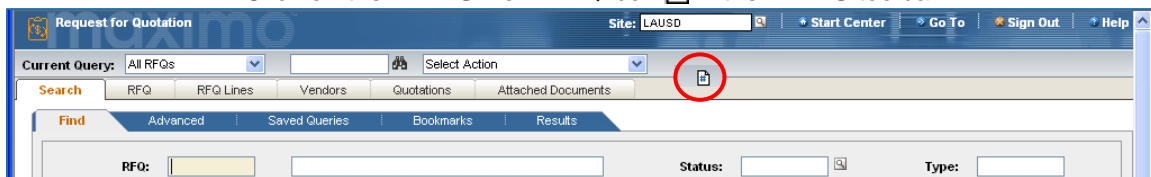


- Start Center** The **Start Center** opens.
- Hover your pointer over the **Purchasing** module.
  - Select **Request for Quotation** from the dropdown menu.



**New RFQ** The **Request for Quotation Find** screen appears.




- Click on the **AWMS New RFQ** icon in the AWMS toolbar.



\* To request a new Maximo user account or to download a copy of this guide and all other application guides, go to Maximo's webpage at <http://mo.laschools.org/fis/existing-facilities/m-and-o/awms>.

- Description** AWMS generates a new **AWMS RFQ** (Request for Quotation) in the status **In Progress (INPRG)**.
- Name the AWMS RFQ in the **Description** field using the following naming convention: 2 Letter Craft Code (space) Work Order Number (space) School Site (i.e., AA 534868 Sunland ES).
  - If you would like to add an additional comment to the Description field, separate the additional comment from the naming convention by a comma, and type your additional comment directly into the Description field (i.e., AA 534868 Sunland ES, Replace Doors).
  - Click on the **Long Description** button to add any special instructions for the RFQ. Type '**Special Instructions**' and all the text that follows will print in the Special Instructions section of the Quote Sheet.

The screenshot shows the Maximo 'Request for Quotation' interface. At the top, there's a 'Current Query' dropdown set to 'All RFQs'. Below that are tabs for 'RFQ', 'RFQ Lines', 'Vendors', 'Quotations', and 'Attachments'. The main form area contains fields for 'RFO: \* 5525', 'AA 9343925 Sunland ES, Purchase Large Bookcases', and 'Status: \* INPRG'. There is also an 'In Workflow?' checkbox. A callout box with an orange arrow points to the 'Long Description' button, with the text: 'Click here to open the Long Description page to type special instructions concerning the entire RFQ.'

- PO Type** Type **BC** or click on the **Lookup**  icon next to the **PO Type** field and select **BC**.
- Craft** Enter the **two-letter Craft Code** of the craft responsible for the **BC**.
- Bid Due** Type the **Date** and **Time** that **Quotes** (or Bids) must be received by. You may use the **Calendar**  icon next to the **Bid Due** field to select a **Date**.
- Ship To** In the **Ship To** section:
- Click in the **Name** field and type the four-digit **Org.Code** of the location the materials will be shipped to.
- Reply To/  
Bill To** In the **Reply To/Bill To** section, click in the **Name** field and type the four-digit **Org. Code** of the location responsible for the **BC**.
- Attention** **Optional** field.
- This field may be left **blank**.
  - The two-letter **Craft Code** (AA, GA, EA, etc.) may be used to indicate a position.
  - A **Labor Code** (employee number) may be entered to indicate an employee.
- Save** Click on the floppy disk  icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, "**Record has been saved.**"

BUYER CARD REQUISITION

The screenshot shows the Maximo Request for Quotation (RFQ) form. Callouts provide the following instructions:

- Enter BC in the PO Type field.** (Points to the PO Type field)
- Enter the date and time Quotes are due** (Points to the Bid Due field)
- Enter the 2-letter Craft Code** (Points to the Craft field)
- Enter the Org. Code** (Points to the Organization field)
- Craft Code or Labor Code** (Points to the Craft field in the Ship To section)
- Craft Code or Labor Code** (Points to the Craft field in the Reply To / Bill To section)

2. CREATE THE AWMS RFQ LINE ITEMS.

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

The screenshot shows the Maximo RFQ form with the 'RFQ Lines' tab highlighted by an orange arrow.

**New Row** Click on **New Row** to create the first PR Lines item.

The screenshot shows the Maximo RFQ Lines table. The table is currently empty, displaying 'No RFQ lines found.' The 'New Row' button at the bottom right is highlighted by an orange arrow.

Line	Item	Description	Storeroom	Quantity	Order Unit	Conversion	Work
No RFQ lines found.							

**Item** Enter a **Commodity Code** in the **Item** field and click outside the field. The item description auto-populates.

- Overtyping the description to match what is being ordered. (The description should be enough information for the Buyer Card holder to place the order.)
- The **Long Description** of the **line item** may be used for items requiring lengthy specifications. Specifications listed here will print together with the line item description.

BUYER CARD REQUISITION

- Fill In** Enter the following details for requisition line.
- **Model/Manufacturer** (if needed)
  - **Quantity and Order Unit.**
  - **Work Order** Number
  - Verify that the **Location, Section, and GL Debit Account** are populated.

The screenshot shows the Maximo 'Request for Quotation' interface. At the top, the site is 'LAUSD'. The current query is 'All RFQs'. The RFQ number is 5526, and the item is 'AA 9343925 Sunland ES, Large Bookcases'. The status is 'INPRG'. Below this is a table of RFQ Lines with one line item: Line 1, Item 4155500000, Description 'Furniture, Laboratory (Custom Made)', Quantity 1.00, Order Unit EA, Conversion 1.00, and Work Order 9343925. Below the table, the form fields are populated with: Line 1, Item 4155500000, Description 'Furniture, Laboratory (Custom Made)', Model (empty), Manufacturer (empty), Quantity 1.00, Order Unit EA, Conversion 1.00, Work Order 9343925, Location 22233, Section 0640, Craft MAX, PO (empty), PO Line (empty), Requisition (empty), Requisition Line (empty), GL Debit Account 009-AMO-0640-9771-5602, Entered By DLU123, Entered Date 11/2/10 2:29 PM, Requested By DLU123, Required Date (empty), Supervisor (empty), Remarks (empty), Awarded Vendor (empty), and Awarded Date (empty). Callout boxes point to the 'Manufacturer Number' field, the 'Model Number' field, the 'Quantity/Order Unit' fields, and the 'Work Order Number' field.

Repeat steps if you are quoting more than one item.

**Save** Click on the floppy disk icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, **“Record has been saved.”**

**3. PRINT AND DISTRIBUTE MAINTENANCE MATERIAL BID FORM TO PROSPECTIVE VENDORS**

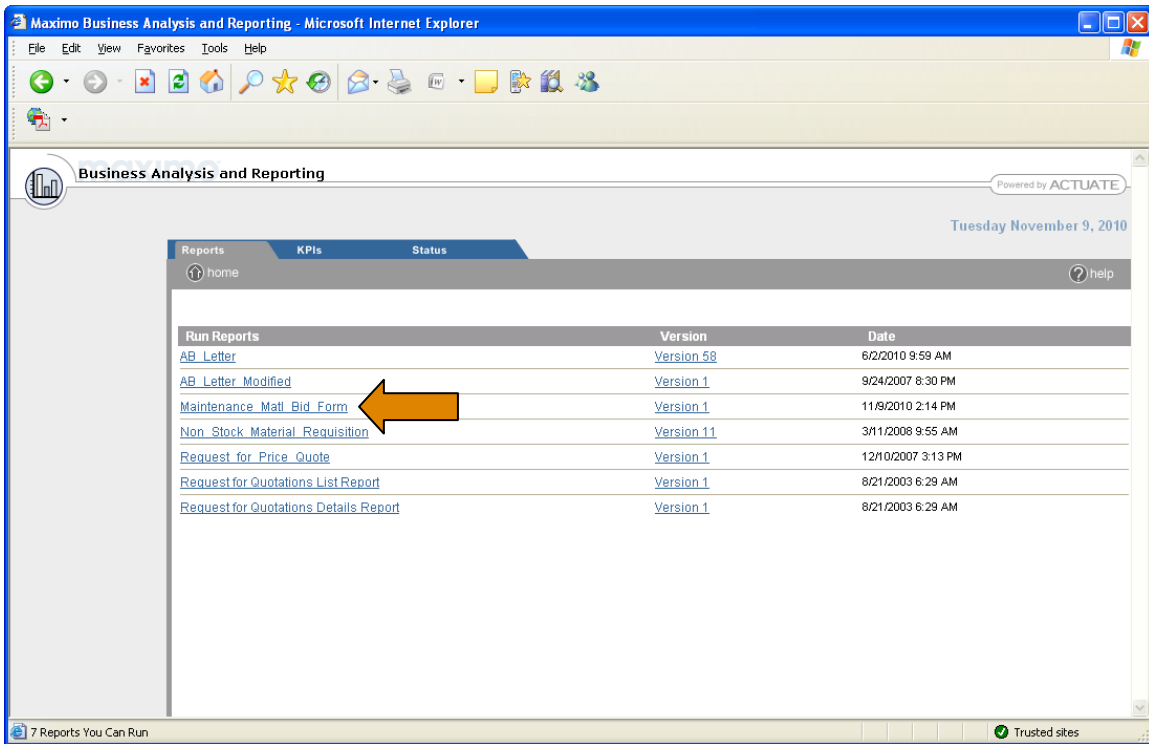
*The Requestor will perform this function.*

Click on **Select Action** and choose **Run Report** from the dropdown list.

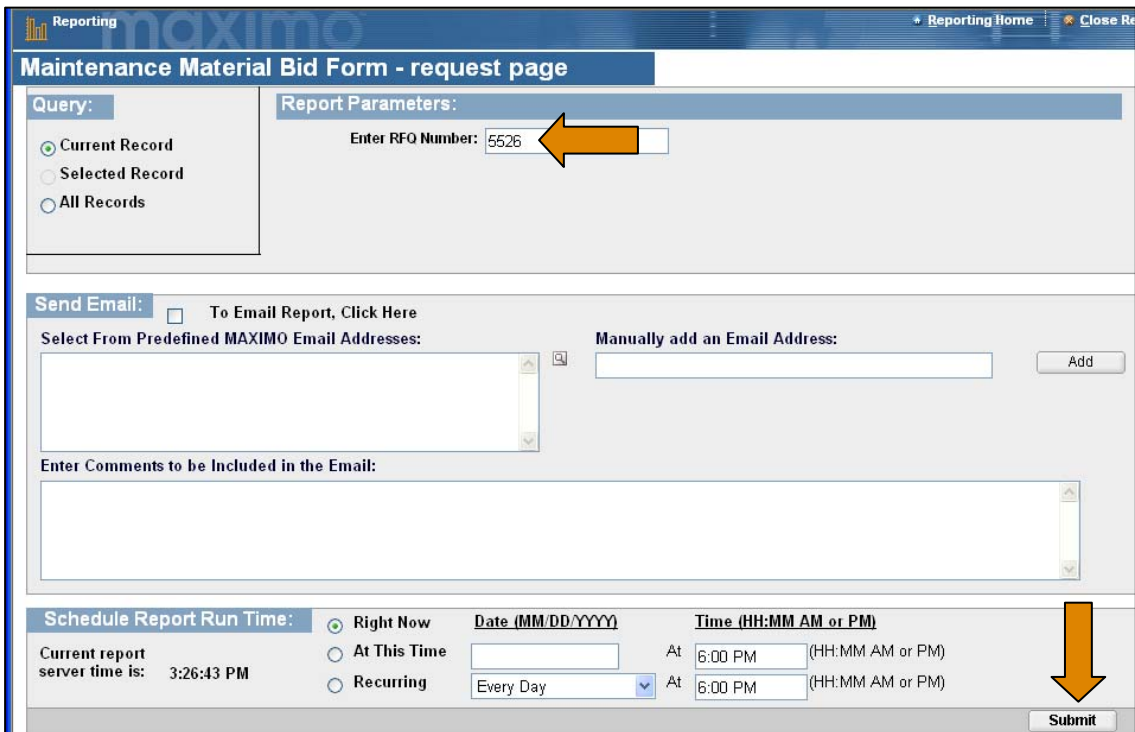
The screenshot shows the Maximo 'Request for Quotation' interface with the 'Select Action' dropdown menu open. The menu options are: Change Status, Route RFQ, Stop Workflow, View Status/Workflow History, View Workflow Help, Copy PR Line Items to RFQ, Add/Modify Order Unit Values, Add/Modify Standard Services, Run Reports (highlighted with a yellow arrow), RFQ Details Report, Print with Attachments, Duplicate RFQ, and Add To Bookmarks. The background shows the same RFQ details as the previous screenshot.

BUYER CARD REQUISITION

Click on the **Maintenance Matl Bid Form** Report



Enter the **RFQ Number** and click **Submit**





4. ENTER PROSPECTIVE VENDORS IN THE RFQ, VENDORS TAB.

The Requestor will perform this function.

**New Row** Click on the **Vendors** tab. Click on **New Row** to enter the first Vendor.

**Vendor**

Enter the Vendor Code in the **Vendor** field. Click outside the field and the Vendor Details auto-populate. See the next page to **Search** for a **Vendor**.

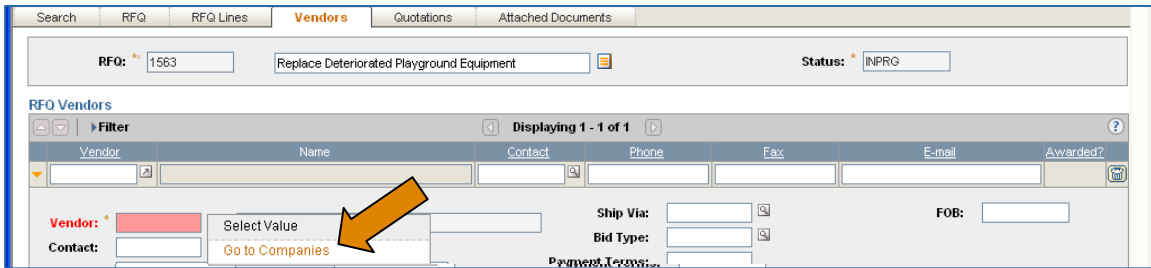
- Make sure the **Contact** field has the contact name of the person submitting the quote.
- Missing phone numbers, fax numbers, and e-mail addresses may be added as well. Adding Vendor information here will not alter the Vendor record in the Companies table.
- Continue adding Vendors in this fashion beginning with **New Row** for each prospective Vendor.

**Save**

Click on the floppy disk icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, "**Record has been saved.**"

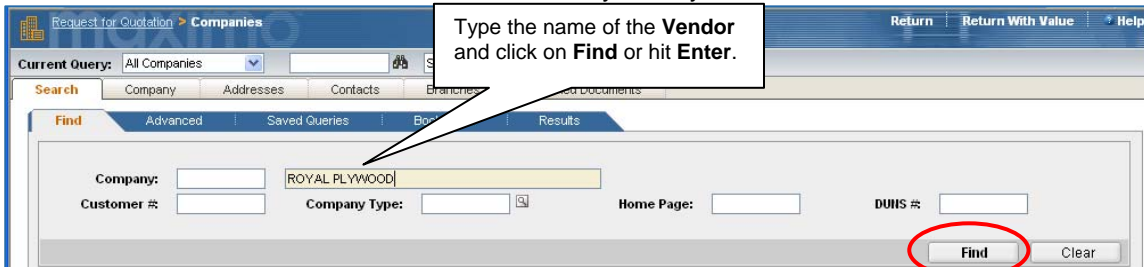
BUYER CARD REQUISITION

**Search** To search for a **Vendor Code**, click on the **Detail Menu**  next to the **Vendor** field and choose **Go to Companies**.



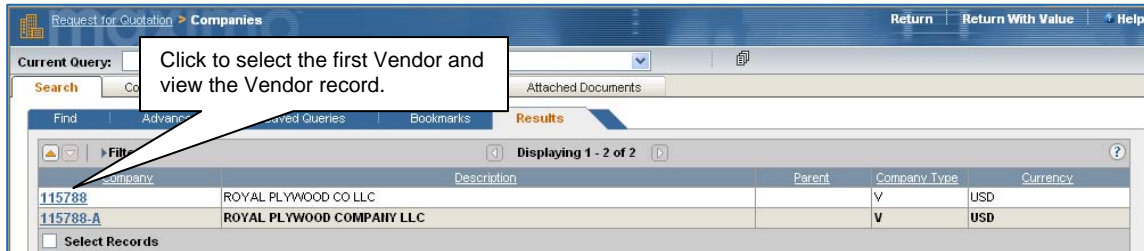
The screenshot shows the 'Vendors' tab with a search bar containing 'RFQ: \* 1563' and 'Replace Deteriorated Playground Equipment'. Below the search bar, there is a 'Vendor' field with a dropdown arrow and a 'Go to Companies' button. An orange arrow points from the 'Go to Companies' button to the 'Vendor' field.

**Name** Type the name of the **Vendor** in the field to the **right** of the **Company** field. Click on the **Find** button or hit **Enter** on your keyboard.



The screenshot shows the 'Companies' search interface. The 'Company' field contains 'ROYAL PLYWOOD'. A callout box points to this field with the text 'Type the name of the Vendor and click on Find or hit Enter.' The 'Find' button is circled in red.

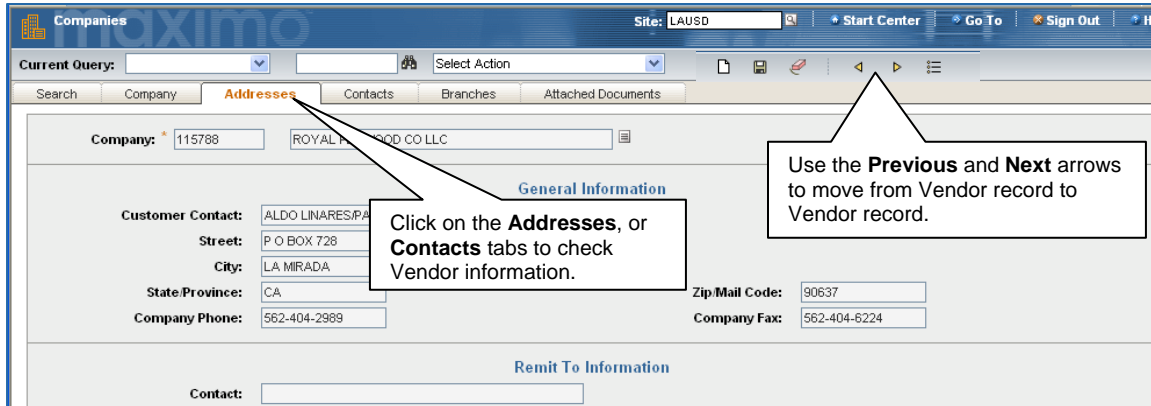
**Select** If multiple Vendors Codes are returned for the same Vendor, select the first record to view the **Vendor** information. If a vendor number is not available, please contact your clerical staff to create a temporary vendor number.



The screenshot shows the 'Results' tab with a table of vendor records. A callout box points to the first record with the text 'Click to select the first Vendor and view the Vendor record.'

Company	Description	Parent	Company Type	Currency
115788	ROYAL PLYWOOD CO LLC		V	USD
115788-A	ROYAL PLYWOOD COMPANY LLC		V	USD

**Vendor Info** Use the **Previous** and **Next** arrows to move from record to record. Click on the various tabs within the Vendor record to check on Vendor information.



The screenshot shows the 'Addresses' tab for a vendor record. Callout boxes point to the 'Addresses' and 'Contacts' tabs, and the 'Previous' and 'Next' navigation arrows.

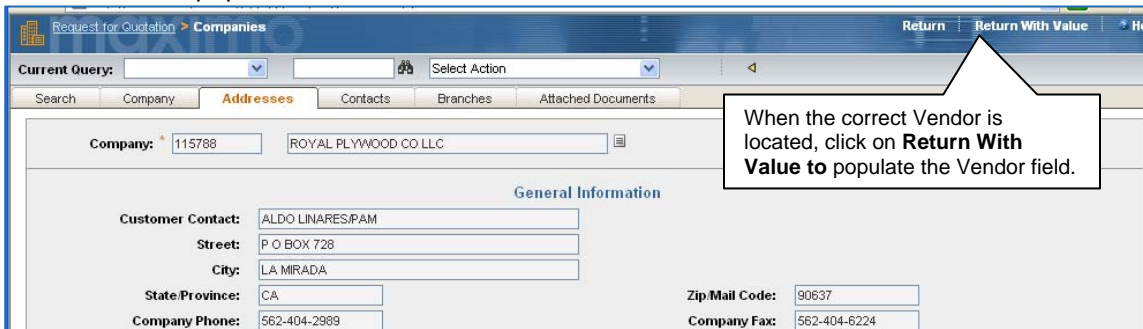
Company: \* 115788 ROYAL PLYWOOD CO LLC

Customer Contact: ALDO LINARES/P...  
 Street: P O BOX 728  
 City: LA MIRADA  
 State/Province: CA  
 Company Phone: 562-404-2989

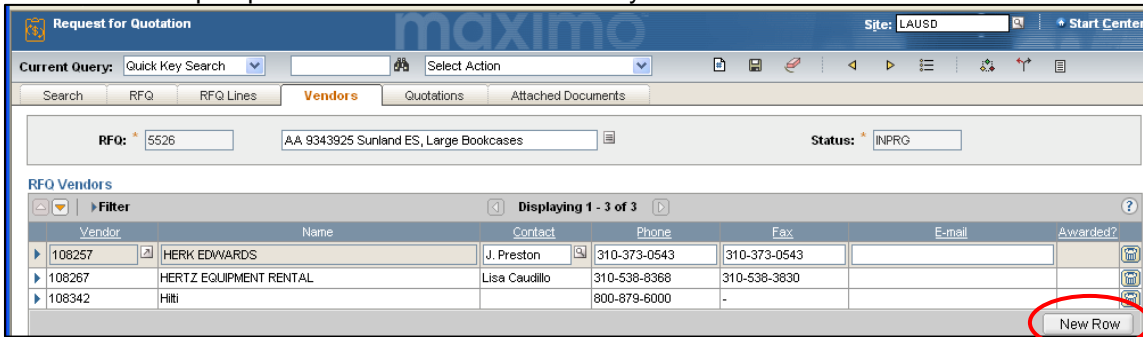
Zip/Mail Code: 90637  
 Company Fax: 562-404-6224

BUYER CARD REQUISITION

**Select** When the correct Vendor record is located, click on **Return With Value** to populate the Vendor field.



**Complete** Continue adding Vendors, beginning with **New Row** for each entry, until all prospective Vendors have a line entry.



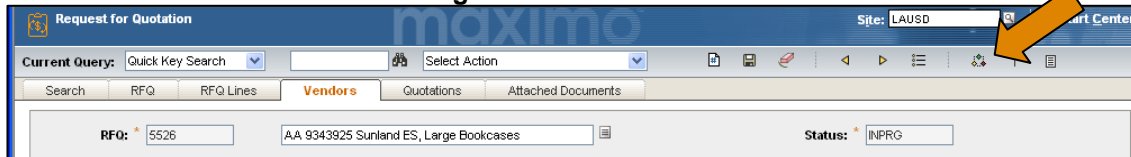
**Save** Click on the floppy disk icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, **“Record has been saved.”**

5. **CHANGE THE STATUS OF THE AWMS RFQ TO SENT, AND ENTER VENDOR QUOTES IN THE RFQ, QUOTATIONS TAB.**

*The Requestor will perform these functions.*

**Change Status** The **Status** of the **RFQ** must be changed to **Sent to the Vendor (SENT)** in order to enter **Quotes**.

- Click on the **Change Status** icon in the AWMS toolbar.



BUYER CARD REQUISITION

- Choose **Sent to the Vendor (SENT)**
- Click **OK**.
- Click on the **Quotations** tab to **Select RFQ Lines**.

The screenshot shows the 'Request for Quotation' interface with the 'Vendors' tab selected. A 'Change Status' dialog box is open, showing the 'New Status' dropdown set to 'Sent to the Vendor (SENT)'. The 'Date Changed' is 11/15/10 1:51 PM. The 'OK' button is circled in red. A callout box points to the 'OK' button with the text: 'Click on the blue arrow icon to view the selection and click on **Sent to the Vendor (SENT.)** Click **OK**.' Another callout box points to the 'Quotations' tab with the text: 'After changing the Status to Sent, click on the Quotations tab.'

**RFQ Lines**

The **Vendor** tab in the middle of the **Quotations** tab screen displays a summary line for each Vendor.

- Click on the first **Vendor** to **highlight** the line.
- Scroll to the bottom of the screen to view the data box containing **Quotations for this Vendor**.
- Click on the **Select RFQ Lines** button.

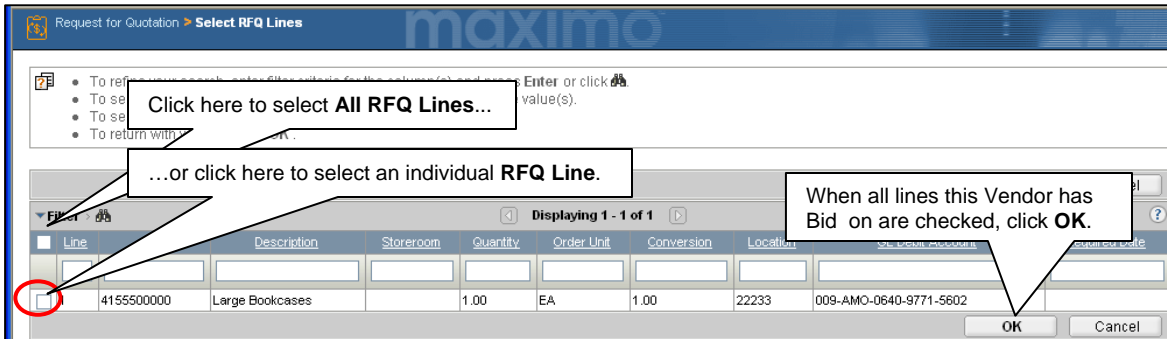
The screenshot shows the 'Request for Quotation' interface with the 'Quotations' tab selected. The status is 'SENT'. A table displays vendor information. The first vendor, 'HERK EDWARDS', is highlighted with a red box. A callout box points to this row with the text: 'Click on the first Vendor to highlight the line.' At the bottom right, the 'Select RFQ Lines' button is circled in red.

Vendor	Name	Contact	Phone	Total Bid Amount	Fax	E-mail	Awarded?
108257	HERK EDWARDS	J. Preston	310-373-0543	0.00	310-373-0543		
108267	HERTZ EQUIPMENT RENTAL	Lisa Caudillo	310-538-8368	0.00	310-538-3830		
108342	Hilti		800-879-6000	0.00	-		

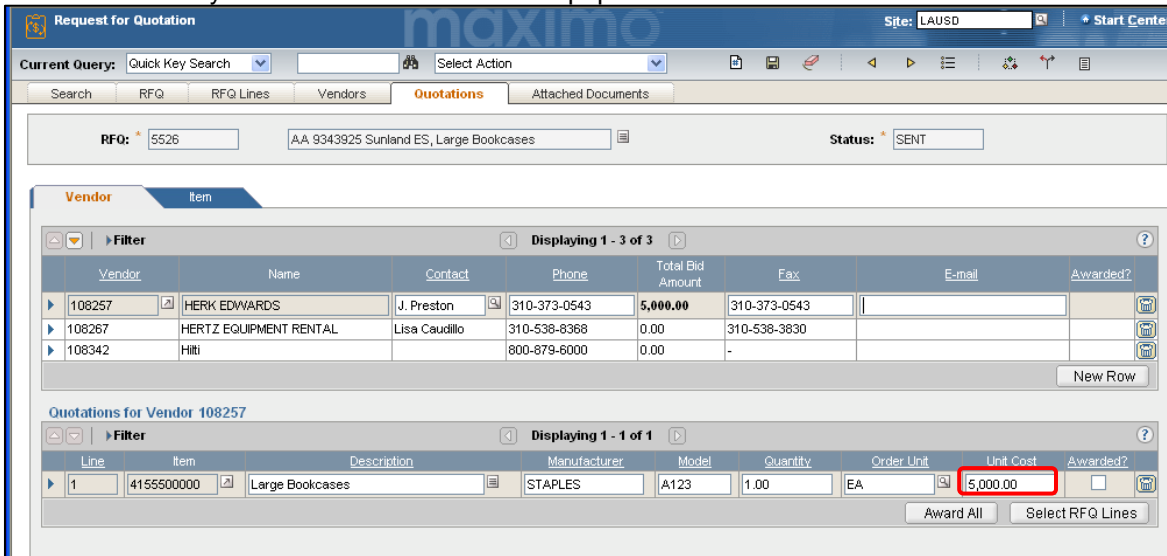
BUYER CARD REQUISITION

**Note** Select RFQ Lines and enter Quotes for all Vendors submitting Quotes.

- Select** In the **Select RFQ Lines** screen that appears:
- Click in the checkbox  at the top of the column to select **All RFQ Lines...**
  - **OR** click in each check box  **individually** for only those items this Vendor submitted Quotes for.
  - Click **OK**.

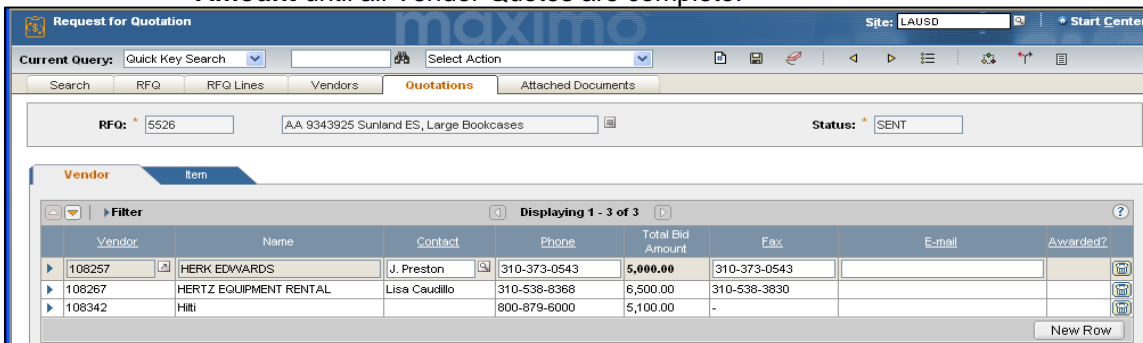


**Bid Amount** Enter the **Quote** in the **Unit Cost** field of each line item bid upon. The system calculates the total and populates the **Total Bid Amount** Field.



**Save** Click on the floppy disk icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, **“Record has been saved.”**

**Complete** Continue to **Select the RFQ Line(s)** for each Vendor, and enter each **Quote Amount** until all Vendor Quotes are complete.



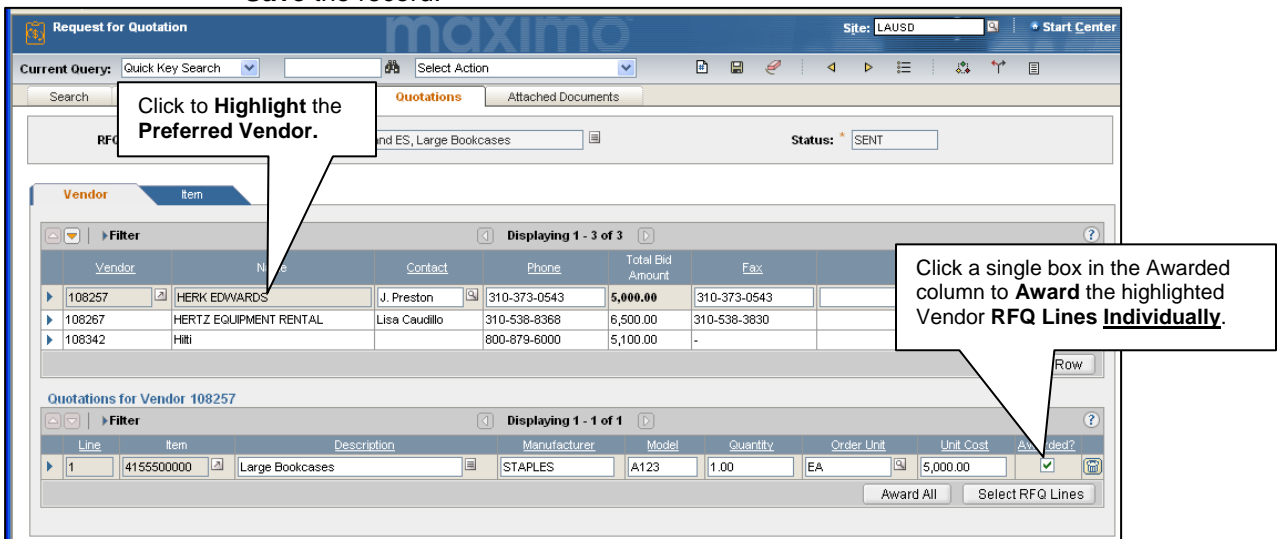
**6. SELECT THE PREFERRED VENDOR TO AWARD**

*The Requestor will perform these functions.*

**Vendor**

To select the **Preferred Vendor**;

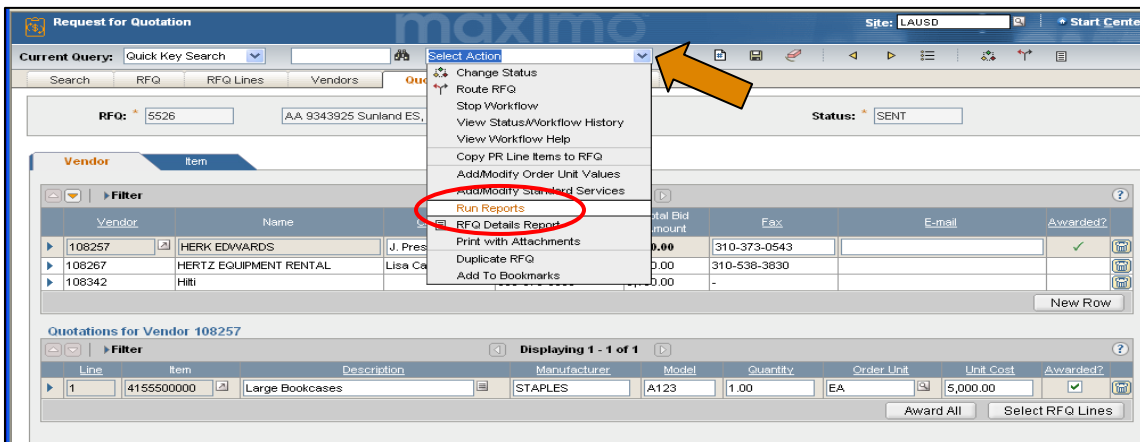
- Click on the **Quotations** tab.
- Highlight the **Preferred Vendor**.
- You may select to Award all lines, or individual lines.
  - Click on the **Award All** button to select **all lines**.
  - Click in the checkbox  located at the end of the line item to select each **individual line** for which quotes were received. This option would be used for a Vendor that did not provide quotes on all the items listed.
- **Save** the record.



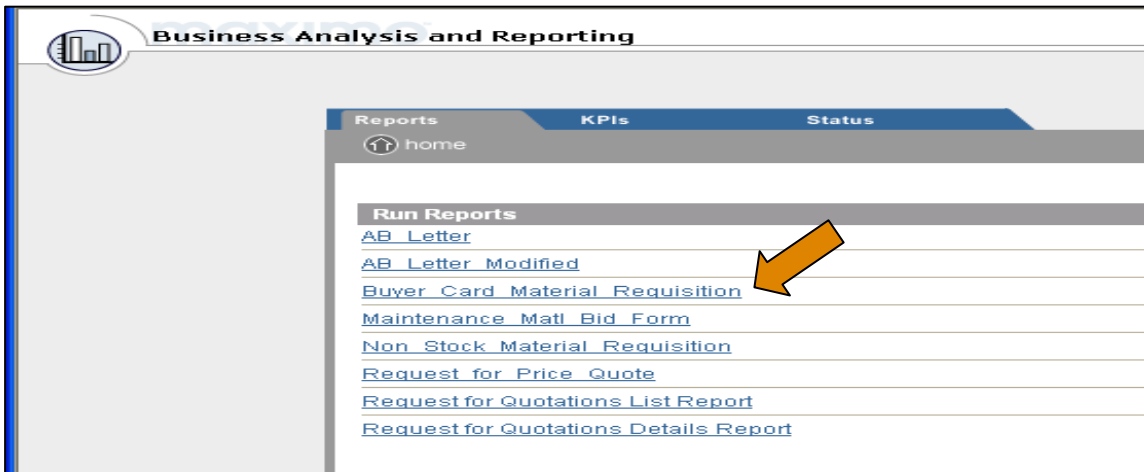
**7. PRINT THE BUYER CARD MATERIAL REQUISITION REPORT.**

*The Requestor will perform this function.*

**Run Reports** Click on **Select Action**, and choose **Run Reports**.



Choose **Buyer Card Material Requisition**.



- Parameters** Enter the **Report Parameters** to Run the **Buyer Card Material Requisition**;
- Enter the **RFQ Number** and any **Comments** to the vendor.
  - **Select** the **Basis of Award**.
  - Utilize the remaining text boxes if the **Basis of Award** requires **Justification**.
  - Click on the **Submit** button.

The screenshot shows the "Buyer Card Material Requisition" report parameters form. It includes a "Query:" section with radio buttons for "Current Record", "Selected Record", and "All Records". The "Report Parameters:" section contains a "Submit" button, an "Enter RFQ Number:" field with the value "5526", a "Requestor Comments:" text area with the value "Deliver items to Storeroom", and a "Select Basis of Award:" dropdown menu with the selected value "Competitive (low, low as a whole, low per spec.)". Below these fields are two text areas for justification: "If Sole/Single Source, provide justification:" and "If 'Other Basis of Award', explain:".

BUYER CARD REQUISITION

**Print** Click on the **Print** icon in the AWMS toolbar to print the **Buyer Card Material Requisition**. The RFQ number is a link to another view of this report.

Reporting

Page: 1 of 2    100%

**Los Angeles Unified School District**  
*Facilities Service Division - Existing Facilities*

**ProCharge Transaction #:**  
*Maintenance and Operations*

BUYER CARD MATERIAL REQUISITION

RFQ#: 5526	Date: 12/6/2010	Budget FY: 2011
Org Name: M&O MAINTENANCE CENTRAL 3		
<b>Suggested Vendor:</b>	Resp Area: MTS	Resp Org: 1421
Vendor Code: 108257	Requested By: Lu, Danny	FAX: 213-241-8948
Name: HERK EDWARDS	Phone: 213-241-0573	Comments: Deliver items to Storeroom
Address: P O BOX 4204 TORRANCE, CA 90510		
Contact: J. Preston		
Phone: 310-373-0543    FAX: 310-373-0543		
Ship To: MTS - M&O MAINTENANCE CENTRAL 3 1500 E 14th Street LOS ANGELES, CA 90021	Bill To: MTS - M&O MAINTENANCE CENTRAL 3 1500 E 14th Street LOS ANGELES, CA 90021	

FUII	AREA	ORG/SUB	PROG	OBJ/SUB	JOB IIO/PROJ	WO IIO.	FUII	AREA	ORG/SUB	PROG	OBJ/SUB	JOB IIO/PROJ	WO IIO.
01	009	AMO	0640MAX	9771	5602	MAX.ADMIN	9343925						

Line #	Qty	Units	Item #	Acct Line	Description, Mfg, Model, Notes	Unit Cost	Tax	Line Cost	Total Line Cost
001	1.00	EA	415550000	01	Large Bookcases, STAPLES, A123	5,000.00	487.50	5,000.00	\$5,487.50
<b>Total:</b>							<b>\$487.50</b>	<b>\$5,000.00</b>	<b>\$5,487.50</b>

Obtain the required signatures (**CPM** for \$2,500-\$5,000; **AFSD** for \$5,001-\$10,000; **LDFD** for \$10,001-\$78,900) on the **Buyer Card Material Requisition Report** and submit report to the **Buyer Card holder** for processing.

**8. PURCHASE MATERIAL, HAND WRITE PROCHARGE TRANSACTION # ON BUYER CARD MATERIAL REQUISITION REPORT, AND CREATE PO**

*The Buyer Card holder will perform these functions.*

Access the **RFQ record** in the RFQ application

**Change Status** The **Status** of the **RFQ** must be changed to **Approved to create PO (COMP)** in order to create the Purchase Order.

- Click on the **Change Status** icon in the AWMS toolbar.

24

BUYER CARD REQUISITION

Request for Quotation  
Loading... Site: LAUSD Start Center Go To

Current Query: Quick Key Search Select Action

Search RFQ RFQ Lines Vendors Quotations Attached Documents

RFQ: \* 5526 AA 9343925 Sunland ES, Large Bookcases Status: \* SENT

Vendor	Name	Contact	Phone	Total Bid Amount
108257	HERK EDWARDS	J. Preston	310-373-0543	5,000.00
108267	HERTZ EQUIPMENT RENTAL	Lisa Caudillo	310-538-8368	6,500.00
108342	Hilti		800-879-6000	5,100.00

Quotations for Vendor 108257

Line	Item	Description	Manufacturer	Material
1	4155500000	Large Bookcases	STAPLES	A123

Change Status

RFQ: 5526 Description: AA 9343925 Sunland ES, Large Bookcases

Current Status: SENT

New Status: Approved to create PO (COMP)

Date Changed: 11/15/10 2:39 PM

Memo:

OK Cancel

To create the **Buyer Card Material Purchase Order**;

- Click on the **Quotations** tab.
- Click on the twister of the **Awarded Vendor** to open the details section.
- Click on the **Create PO** button.

Request for Quotation Site: LAUSD Start Center Go To Sign Out Help (213) 241-4642

Current Query: Quick Key Search Select Action

Search RFQ RFQ Lines Vendors Quotations Attached Documents

RFQ: \* 5526 AA 9343925 Sunland ES, Large Bookcases Status: \* COMP

Vendor	Name	Contact	Phone	Total Bid Amount	Fax	E-mail	Awarded?
108257	HERK EDWARDS	J. Preston	310-373-0543	5,000.00	310-373-0543		✓
108267	HERTZ EQUIPMENT RENTAL	Lisa Caudillo	310-538-8368	6,500.00	310-538-3630		
108342	Hilti		800-879-6000	5,100.00	-		

Vendor: \* 108257 HERK EDWARDS Ship Via: FOB:

Contact: J. Preston Customer #: Bid Type: Payment Terms:

Phone: 310-373-0543 Fax: 310-373-0543 Freight Terms:

E-mail: Vendor Quote #: Date of Vendor's Reply:

Currency: \* USD Pay Tax to Vendor?  Vendor Quote #: Date of Vendor's Reply:

Contract Details

Cont License No: Cont Classification: Financial Rating(s)(Auto, Liability):

Auto Ins Exp: Liability Ins Exp: Workers Comp Ins Exp:

Ins Verified By: Ins Verified Date: Safety Prequal Date:

Create PO Done Delete

Enter **ProCharge Transaction #** as the Purchase Order number and click **OK**.

Request for Quotation Create PO Help

Create a PO by either entering a unique number in the PO field or by selecting Autonumber. Select OK when finished.

PO: 222222222 Description: AA 9343925 Sunland ES, Large Bookcases


Autonumber OK Cancel

BUYER CARD REQUISITION

**APPROVE PO** To Approve the PO in AWMS, from the **Start Center**:

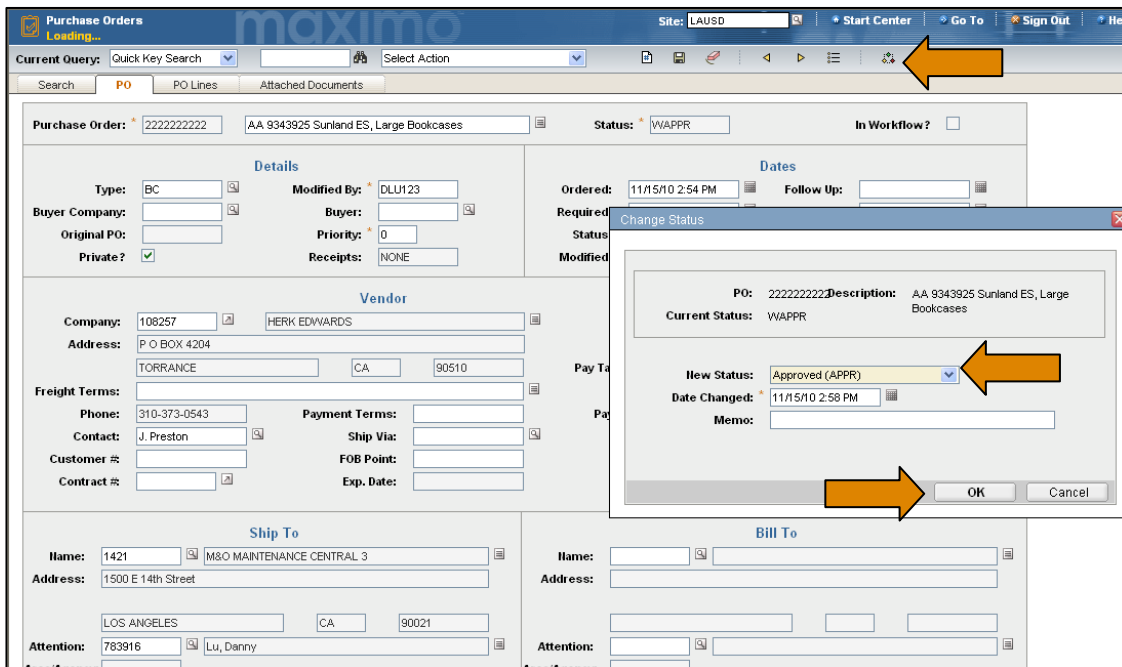
- Hover the pointer over the **Purchasing** module.
- Choose **Purchase Orders**.



Enter the Purchase Order number in the top search field and click on the 



Click on the change status  icon and select **Approved** from the dropdown list and click **OK**.



Submit **Buyer Card Material Requisition Report** and **Purchase Receipt** to Stores personnel.

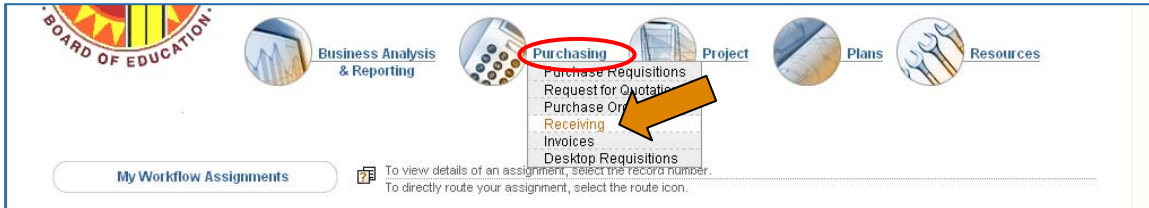
**7. ORDER RECEIVED, STORES TO RECEIVE LINE ITEM IN RECEIVING APPLICATION AND SUBMIT RECEIPT/PACKING LIST TO BUYER CARD HOLDER**


*The Stores personnel will perform these functions.*

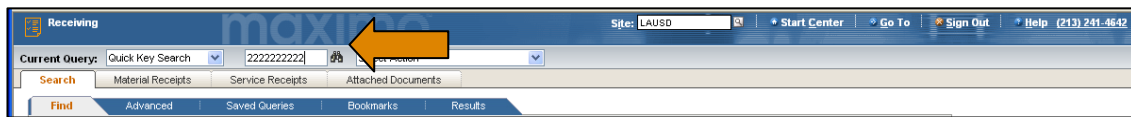
BUYER CARD REQUISITION

**Receiving** To Receive the Line Items in AWMS, from the **Start Center**:

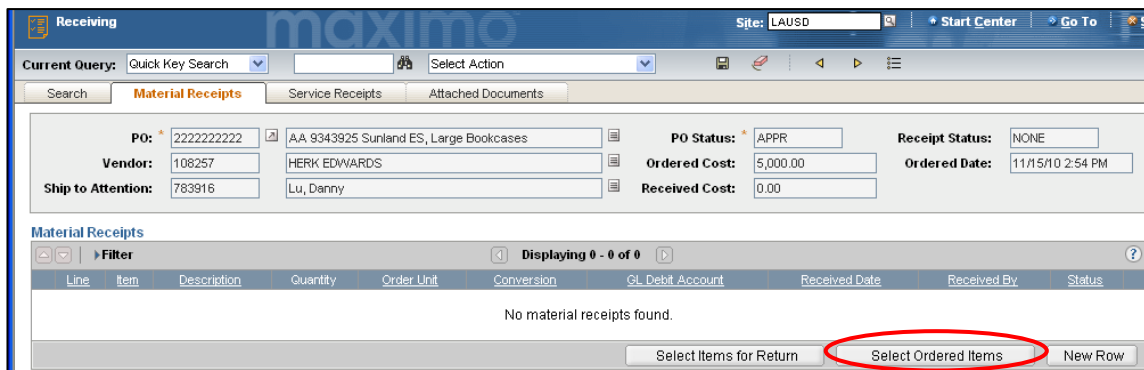
- Hover the pointer over the **Purchasing** module.
- Choose **Receiving**.



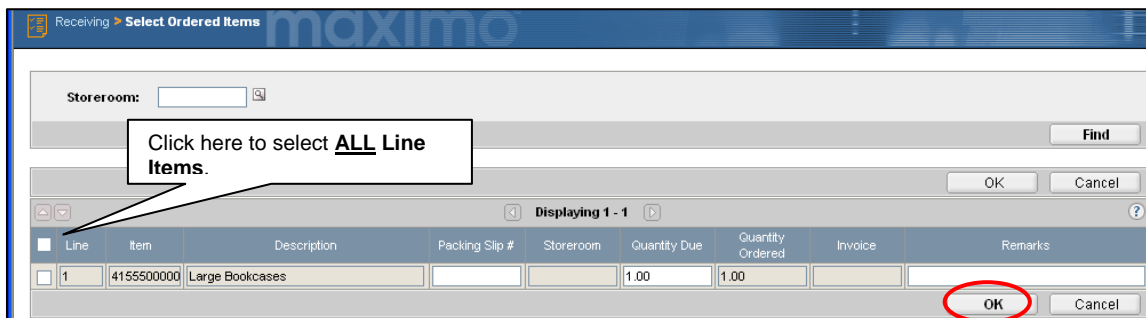
Enter the **ProCharge Transaction #** in the top search field and click on the 




**Select** In the **Receiving** screen that appears, click on the **Select Ordered Items** button.

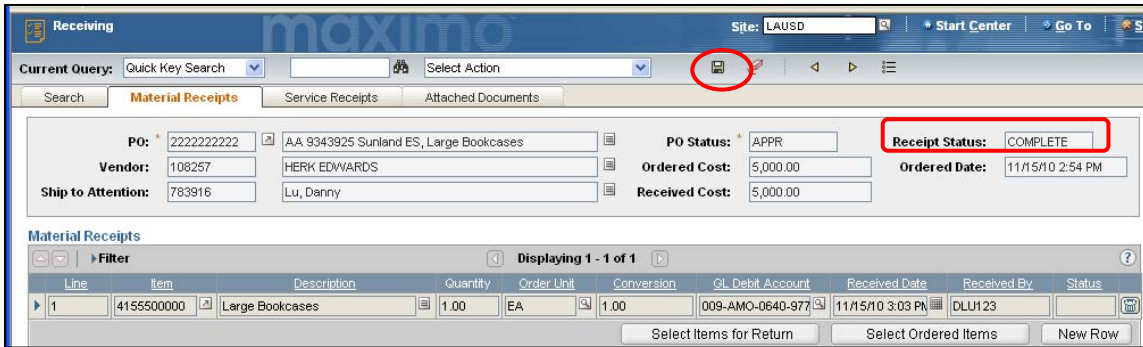


**Items** Click in the selection boxes  to select the items received. The top checkbox selects all items. Click **OK** when the items received have been selected.



**Save** Click on the **Save**  icon in the AWMS toolbar. **Saving** the record changes the **Receipt Status** to **COMPLETE**.

BUYER CARD REQUISITION



**COMPLETE** Receipt Status is **COMPLETE**.


Stores to submit **Buyer Card Material Requisition Report, Purchase Receipt and Packing Slip** to Buyer Card Holder.

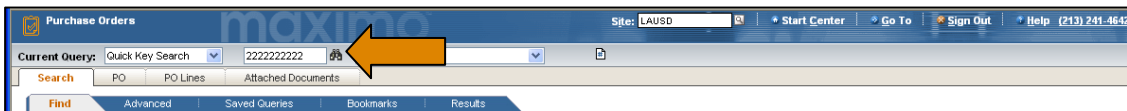
**8. CLOSE PO, RECONCILE AND UPLOAD DOCUMENTS TO PROCHARGE**

*The Buyer Card holder to perform these functions.*


- CLOSE PO** To Close the PO in AWMS, from the **Start Center**:
- Hover the pointer over the **Purchasing** module.
  - Choose **Purchase Orders**.

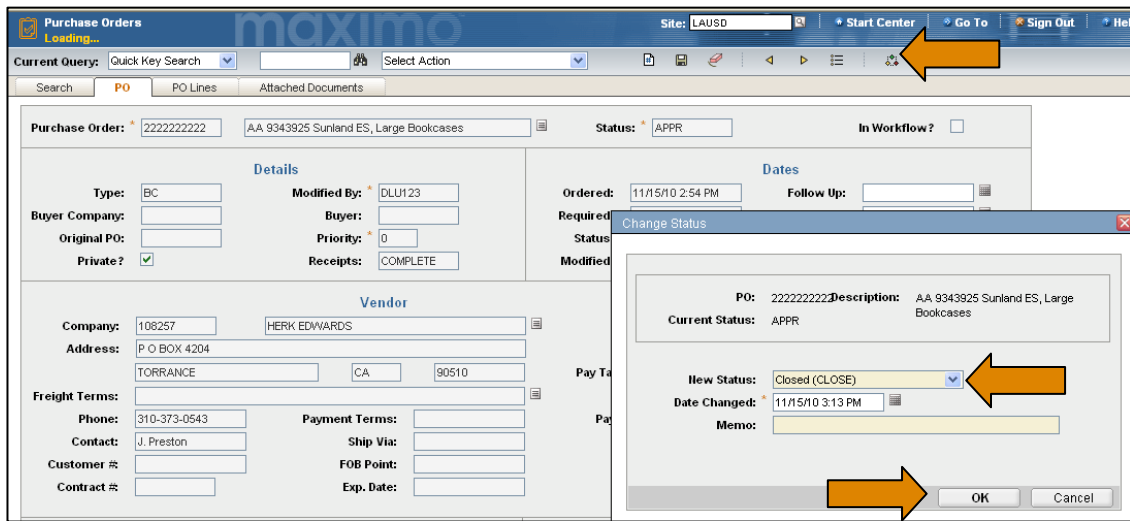


Enter the Purchase Order number in the top search field and click on the 



BUYER CARD REQUISITION

Click on the change status  icon and select **Close** from the dropdown list and click **OK**.



Reconcile purchase and upload all documents to ProCharge application.