Los Angeles Unified School District

AWMS Procurement Working Group

Purchase from S1 Storeroom in AWMS

LAUSD Maintenance and Operations Purchase from S1 Storeroom in AWMS

DEFINITION

A Stock Material Requisition (SMR) or Desktop Requisition (DR) is used to purchase items from the S1 Warehouse in Pico Rivera via a virtual local Area S1 Storeroom in AWMS Maximo. These may be items that are normally carried in the local Area Storeroom, but a larger quantity is needed than is locally available.

PURPOSE

The purpose of using the SMR and DR to purchase items from the virtual S1 Storeroom in AWMS Maximo is to enable the local Areas to track and apply S1 purchases against their charge-point Work Orders in AWMS Maximo. Please refer to the *Purchasing from Stores Inventory* guide found at http://mo.laschools.org/fis/existing-facilities/m-and-o/awms/ for detailed instructions on creating a Stock Material Requisition (SMR) or Desktop Requisition (DR) in AWMS Maximo.

OVERVIEW

The following tasks outline the process flow for purchasing from the S1 Storeroom in AWMS:

1. Log In to AWMS Maximo using your name and password.
2. Is this purchase to be made against a Planned Job Work Order in the Status of Funded or greater: Yes or No?
    a. Yes – Go to the Desktop Requisition (DR) application and proceed to Step 3.
    b. No – Query for the Work Order charge-point in Work Order Tracking and proceed to Step 5.
3. Create a new Desktop Requisition (DR).
4. Enter the Requisition Description, Shipping Info, Charge Info, Requisition Line Item(s), and Submit. Proceed to Step 8.
5. Click on the Plans tab, then Materials/Services tab at the bottom of the screen.
6. Create a New Row, enter the item number, the required fields, and select the appropriate local Area S1 Storeroom. Save the record. Continue entering all needed items in this manner.
7. Change the status of the Work Order to Approved (APPR) or greater to reserve the items in Stores or Submit the Desktop Requisition.
8. Print the AWMS Maximo Stock Material Requisition (SMR/DR) Report and submit it to the Head Stock Clerk in the local Area Storeroom.
9. The local Area Head Stock Clerk or Designee shall enter the SMR/DR information into IFS. Are the items in stock at the S1 Pico warehouse: Yes or No?
    a. Yes – The items are in stock. The Area Head Stock Clerk shall proceed to Step 10.
    b. No – The local Area Head Stock Clerk shall notify the Requestor of non-stocked items. Proceed to Step 10 to continue, or Step 11b to discontinue the order.

10. Does the unit cost of the item in IFS match the unit cost in AWMS Maximo: Yes or No?
    a. Yes - Proceed to Step 12.
    b. No - If the difference is under $25.00, proceed to Step 12. If the difference is $25.00 or greater, the local Area Head Stock Clerk shall update the unit cost of the item in AWMS Maximo local Area S1 Stores, and inform the Requestor of the price change. Proceed to Step 11.
11. Does the requestor wish to continue the order from S1: Yes or No?
    a. Yes - The requestor will revise the SMR/DR to match the S1 costs and quantities available, reprint the AWMS Requisition, and submit the revised document to the local Area Head Stock Clerk. Proceed to Step 12.
    b. No - Unreserve the items in the Work Order Plans tab or cancel the Desktop Requisition. Items may be purchased from an outside vendor. See purchasing instruction guide for PD, PG, or XPO.
12. The Head Stock Clerk shall process the order in IFS.
13. The S1 Pico warehouse fills the order and issues the items in IFS.
14. Is the order being delivered to the local Area Storeroom from the S1 Pico warehouse: Yes or No?
    a. Yes - The Head Stock Clerk will notify the Craft when the order is delivered to the local Area Storeroom and match the items received to the S1 (IFS) receipt.
    b. No - The Head Stock Clerk will notify the Journeyman or Designee the order is ready for pick-up from the S1 Pico warehouse, providing them with the IFS PO number. The Craft or Designee travels to the S1 Pico warehouse to pick up the order and brings the S1 (IFS) receipt back to the local Area Head Stock Clerk.
15. Upon receipt or pick-up of the items, the local Area Stores Head Stock Clerk issues the items in AWMS Maximo to match the S1 (IFS) receipt and submits a copy of the SMR/DR to the requestor.
16. The process is complete.