



ATTACHMENT 2.4 – PROCEDURE FOR CREATING THE PARENT WORK ORDER, ASSOCIATING THE CHILDS, AND TASKS IN MAXIMO FOR PEG

1. Work Identified and Request Made

Work can be identified and requested by a number of different parties. For example, M&O Central may supply a list of building level work orders that are in need of construction support. Work requests may also come from upper management and/or other FSD departments such as the Bid Processing Unit for execution assistance.

2. Identify all related building level work orders for a site and Create a Parent Work Order

The AFSD or Designee performs this function.

Review the list of building level work orders and budgeted cost, if necessary, group all related site level work and submit to Analyst for AWMS *Parent Work Order* creation and funding request.

The Analyst or Designee performs this function.

Log On

Log on to AWMS. Type in your **user name** and **password**. Click on **Sign In** or hit **Enter** on your keyboard.

A screenshot of the LAUSD Facilities Information System login page. The page features the LAUSD logo on the left, the text "LAUSD Facilities Information System Assets and Work Management" in the center, and a "Welcome to PRODUCTION" message. At the bottom, there is a login form with fields for "user name" (containing "smith") and "password" (containing "*****"), a "Sign In" button, and a "change password" link. The page is powered by Maximo MRO Software.

LAUSD Facilities Information System
Assets and Work Management

Welcome to PRODUCTION

Powered by Maximo®
MRO Software™

user name password

change password

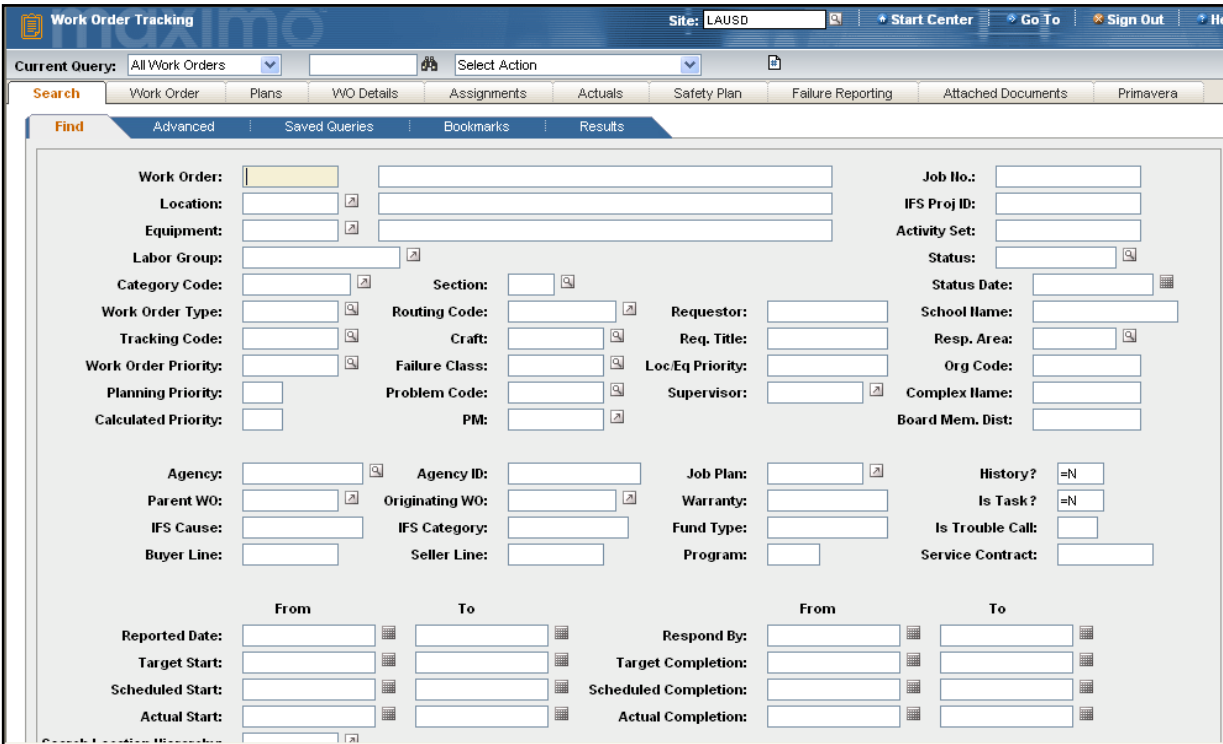


Start Center

AWMS opens to the **Start Center**. The AWMS Applications are grouped into nine Modules. A PEG project is initiated with the creation of a Work Order in the Work Module. Place the cursor over the **Work** Module and a dropdown menu appears. Choose **Work Order Tracking**.



Find Screen Each AWMS Module opens to a **FIND** screen.



Create New WO

To create a new Work Order, click on the **New Work Order #** icon in the AWMS toolbar.





New Work Order

The AWMS **New Work Order** opens with an assigned Work Order number. The Status is **Waiting on Approval** or **WAPPR**. Fields with an asterisk* must be populated before the record can be saved. Populate the **Bolded** fields listed below.

General WO Information

- Description
- Location
- Work Priority
- IFS Proj ID
- Section
- Work Type
- Requestor
- Req. Title
- Tracking Code

Responsibility Section

- Category Code
- Routing Code

The screenshot shows the Maximo Work Order Tracking interface. The form is titled "Work Order Tracking" and includes a toolbar with a floppy disk icon for saving. The form is divided into several sections:

- Work Order Information:** Includes fields for Work Order (3998038), Location (4616), Section (1422), Requestor (TIM GODAR), Req. Title (ROOFING TECH SPVR), Status (WAPPR), and Job No. (1ZJ48).
- Job Details:** Includes Job Plan, Safety Plan, PM, Service Contract, Failure Class, and Problem Code.
- Scheduling Information:** Includes Target, Scheduled, Actual, Estimated Duration (2:00), Remaining Duration, Work Group, and Duration Type (FIXED DUR).
- Responsibility:** Includes Category Code (CRPNTRY), Routing Code (EG-AA-PL), Supervisor, Labor Group (MO-PEG), and Craft (AA - Carpenter).
- Modified:** Includes By (DLU123) and Date (3/12/09 9:59 PM).

Save Record

Click on the floppy disk icon in the AWMS toolbar to **Save** the record when all required fields (asterisk * indicates required) are populated. Save often thereafter, as the system does not automatically save. Look for the message at the top of the screen, "**Record has been saved.**"



3. Assign building level work orders to the Parent, Enter 'Dummy' Job Number and Change status to PLANCON (MO Central Planning)

The Analyst or Designee performs this function.

Find Screen

Navigate back to the find screen in Work Order Tracking and enter the “building” level work order so that you can assign it a parent.

1. Enter the **Work Order** number in the “**Quick Key Search**” field and click on the **Binoculars** icon or hit **Enter** on your keyboard. This returns only those records exactly matching your entry.
2. Enter the **Work Order** number in the Work Order field, and click on **Find** at the bottom of the Find screen window, or hit **Enter** on your keyboard.

Work Order Tracking

Site: LAUSD

Current Query: All Work Orders 1225073 Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents Design Info

Find Advanced Saved Searches Bookmarks Results

Work Order: 1225073 Job No.:

Location: IFS Proj ID:

Equipment: Activity Set:

Labor Group: Status:

Category Code: Section: Source ID: Status Date:

Work Order Type: Routing Code: Requestor: School Name:

Tracking Code: Craft: Req. Title: Resp. Area:

Work Order Priority: Failure Class: Loc.Eq Priority: Org Code:

Planning Priority: Problem Code: Supervisor: Complex Name:

Calculated Priority: PM: Board Mem. Dist:

Agency: Agency ID: Job Plan: History? =N

Parent WO: Originating WO: Warranty: Is Task? =N

IFS Cause: IFS Category: Fund Type: Service Call:

Buyer Line: Seller Line: Program: Service Contract:

Reported Date: From To Respond By: From To

Target Start: Target Completion:

Scheduled Start: Scheduled Completion:

Actual Start: Actual Completion:

Search Location Hierarchy:

Find Clear



Enter the *Parent* Work Order in the **Parent WO** Field of the *Building* Work Order.

Work Order Tracking | Site: LAUSD

Current Query: Quick Key Search | Select Action

Search | **Work Order** | Plans | WO Details | Assignments | Actuals | Safety Plan | Failure Reporting | Attached Documents | Design Info

Work Order: * 1225073 | * Predicted Renewal for Exterior Windows, Auditorium Bldg | Parent WO: 3998038 | Job No.: |

Location: 18267 | AUDITORIUM BLDG | WO Priority: 3 | IFS Proj ID: |

Equipment: | | Loc.Eq Priority: 0 | Activity Set: |

Section: | Internal Order No.: | Planning Priority: | Work Type: DFR |

School Name: HUMPHREYS ES | Reported Date: 3/29/06 7:57 AM | In Workflow? | Org Code: 4616 |

Requestor: | Status: * PLANCON | Equipment Up? | Tracking Code: |

Req. Title: | Status Date: * 3/17/08 11:04 AM | Warranty: | School Phone: 213-263-6958 |

Is Task? | Respond By: 6/27/06 7:57 AM | Charge To Store? | Cafeteria Phone: 323 269-1447 |

Agency: | Agency ID: | Change Status on Child WO's? | Responsible Area: AREA-5 |

GL Account: | Source ID: B007445 | Service Call? (Y/N): N | Complex Name: GARFIELD |

Calc. Priority: 1 | Board Mem Dist: 5 |

Save Record

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.**"

***Repeat step for each *Building* Work Order you wish to assign to the same Parent.**

Enter *Dummy* Job Number and Change the Parent Work Order Status to **MO Central Planning (PLANCON)**

Find Screen

Navigate back to the find screen in Work Order Tracking and enter the *Parent* Work Order number to change the status.

Job Number

Enter the dummy Job Number (**PEGPROJX**) in the Job No.: field in the *Parent* Work Order.

Work Order Tracking | Site: LAUSD

Current Query: Quick Key Search | Select Action

Search | **Work Order** | Plans | WO Details | Assignments | Actuals | Safety Plan | Failure Reporting | Attached Documents | Design Info

Work Order: * 3998038 | * REMOVE AND REPLACE DETERIORATED WINDOW FRAMES AND SASH | Parent WO: | Job No.: PEGPROJX |

Location: 4616 | HUMPHREYS ELEMENTARY | WO Priority: 3 | IFS Proj ID: 1ZJ48 |

Equipment: | | Loc.Eq Priority: 0 | Activity Set: |

Change Status

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

Work Order Tracking | Site: LAUSD

Current Query: Quick Key Search | Select Action

Search | **Work Order** | Plans | WO Details | Assignments | Actuals | Safety Plan | Failure Reporting | Attached Documents | Design Info

Work Order: * 3998038 | * REMOVE AND REPLACE DETERIORATED WINDOW FRAMES AND SASH | Parent WO: | Job No.: |

Location: 4616 | HUMPHREYS ELEMENTARY | WO Priority: 3 | IFS Proj ID: 1ZJ48 |

Equipment: | | Loc.Eq Priority: 0 | Activity Set: |



Select **MO Central Planning (PLANCON)** from the drop down list and hit **OK**.

4. Fill out PINK and BLUE request sheet and submit for funding

The Analyst or Designee performs this function.

Fill out the P&B request document and submit to M&O Central for funding.

5. Enter Target Start/Finish Dates and Fill out funding details in the WO Details tab in the Parent Work Order

The Analyst or Designee performs this function.

Find Screen

Navigate back to the find screen in Work Order Tracking and enter the "Parent" level work order.

1. Enter the **Work Order** number in the "Quick Key Search" field and click on the **Binoculars** icon or hit **Enter** on your keyboard. This returns only those records exactly matching your entry.
2. Enter the **Work Order** number in the Work Order field, and click on **Find** at the bottom of the Find screen window, or hit **Enter** on your keyboard.



Target Start/Finish

Enter the **Target Start/Finish** date to the Parent Work Order that is on the Pink and Blue.

Save Record

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.**"

Enter Funding Information in the **Work Order Details** Tab

Work Order Details Click on the **Work Order Details** tab.



Fill in the **Fund Details** section using the general guidelines that follow.

Fund Details

Fund Priority: Fund Type: Fund Ref: IFS Cause: IFS Catgry: IFS Proj No:
 Bill: Ind: Program: Job Type: Adult: Frg: IIP:
 IFS Work Requested:
 Project WO:

Fund Priority Identifies the **Fund Priority** or urgency of the Job Funding.

Value	Description
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> EF	Emergency Funding
<input type="checkbox"/> EM	Emergency Maintenance
<input type="checkbox"/> RT	Routine Maintenance

Fund Type Click on the spyglass icon for the **Fund Type** selection list. Choose the type appropriate for the job.

Value	Description
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> A&I	ALTERATIONS AND IMPROVEMENTS
<input type="checkbox"/> ADULT-ED	ADULT EDUCATION
<input type="checkbox"/> BB-BOND	BB-BOND
<input type="checkbox"/> DEFMAINT	DEFERRED MAINTENANCE
<input type="checkbox"/> FEMA	FEMA
<input type="checkbox"/> FOODSERV	FOOD SERVICES
<input type="checkbox"/> MAINTENANCE	MAINTENANCE
<input type="checkbox"/> MEASURE-K	MEASURE-K BOND
<input type="checkbox"/> MEASURE-R	MEASURE-R BOND
<input type="checkbox"/> MEASURE-Y	MEASURE-Y BOND
<input type="checkbox"/> SPECIAL-ED	SPECIAL EDUCATION

IFS Cause Click on the spyglass icon for the selection list of the job's cause.

Value	Description
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> AG	Act of God
<input type="checkbox"/> DET	Deterioration
<input type="checkbox"/> F	Fire
<input type="checkbox"/> HS	Health and Sanitation
<input type="checkbox"/> INS	Inspection
<input type="checkbox"/> OTM	Other than Maintenance
<input type="checkbox"/> PM	Preventive Maintenance
<input type="checkbox"/> SFY	Safety
<input type="checkbox"/> VAN	Vandalism

IFS Category Specifies the type of cost associated with the estimate dollar amount. Click on the spyglass icon for **IFS Category** options.

Value	Description
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> AB	A&I of Buildings
<input type="checkbox"/> AL	A&I of Leased Buildings
<input type="checkbox"/> AS	A&I of Sites
<input type="checkbox"/> BC	A&I of Bungalow Moves
<input type="checkbox"/> BL	Books & Media
<input type="checkbox"/> BM	Bungalow Moves
<input type="checkbox"/> CA	A&I of Building Contract Admin
<input type="checkbox"/> CM	Construction Management
<input type="checkbox"/> CP	Non-Capital Misc Project Suprt
<input type="checkbox"/> DC	A&I Planning & Design
<input type="checkbox"/> DE	Planning/Design
<input type="checkbox"/> DM	Demolition of Building



Bill

Type or select **I** for Internal or **E** for External in the **Bill** field. Internally billable jobs are funded with District funds. Externally billable jobs are funded with funds outside the District budget.

Ind.

Indicate if this job is eligible for indirect job charges. Enter **Y** for yes or **N** for no. Direct charges are those costs directly related to a specific job. Indirect charges are those costs that cannot be attributed to a specific job such as supervision.

Note: This field must be marked Y (yes) for burdening to appear on the Job Cost Recap Burdened Report.

Program

Four number (Program Code) used in the budget and accounting systems to identify which account will be expended.

For example:

Fund Type	Program
Deferred Maintenance	9771
Maintenance	9766
BB	9776
Measure-K	9775
Measure-R	9819
Measure-Y	9772

Job Type

This field indicates whether the job costs are Direct or Indirect. While there are several valid job types (Direct, Indirect, Unfunded, Holding, Intersection, Material Transfer and Non-Productive), for this purpose the only choices are Direct (**DR**) or Indirect (**ID**).

Adult

Indicates if the school is an Adult school. Verify that this field contains a **Y** for yes or **N** for no, as it applies to the job location.

Frg.

Fringe charges are costs such as dental, and health insurance that are applied to the direct labor cost. If the job is eligible for Fringe charges, enter **Y** for yes or **N** for no.

Note: This field must be marked Y (yes) for burdening to appear on the Job Cost Recap Burdened Report.

NP

Non-Productive Labor charges are costs such as vacation, illness, or jury duty. If the job is eligible for Non-Productive charges, Enter **Y** for yes or **N** for no.

Note: This field must be marked Y (yes) for burdening to appear on the Job Cost Recap Burdened Report.

IFS Work Req.

Type the Work Description as it should appear on the IFS Job Ticket. More information may be entered in the **IFS Work Req.** field than in the general job description.



Buyer/Seller Lines Click on **New Row**

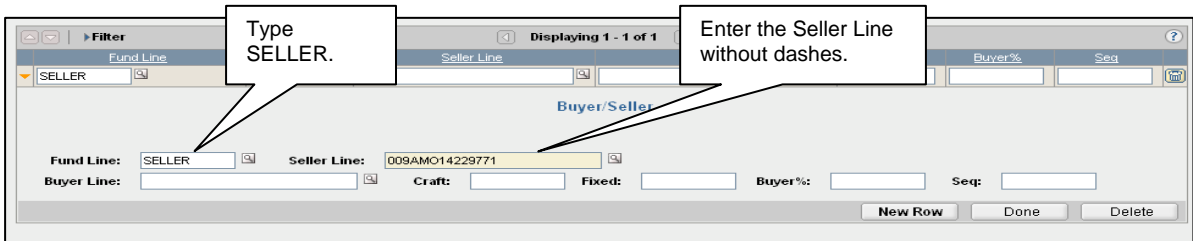


Seller Line

The Seller is the organization providing the service. The Seller initially incurs all the costs associated with performing the job. As the Job Cost billing process is performed, the expenditures incurred by the Seller will be billed to the appropriate buyer account(s) for the “final” funding source(s) of the job. The Seller Line consists of the Job Cost Fund, the Area Code for budget and accounting purposes, the Org. Code used to identify each school and office, the Program Code used to identify which budget account will be expended, and the Object Code that best describes the expenditure.

Type or choose from the Detail Menu “**Seller**” in the **Fund Line** field. Enter the Seller Line in a string without spaces or dashes. AWMS will enter the dashes when you **Save** the record.

Seller Line	Project Type
009AMO14229771	Deferred Maintenance
009AMO14229766	Maintenance or Williams Grant
009AMO14229776	BB
009AMO14229775	Measure-K
009AMO14229819	Measure-R
009AMO14229772	Measure-Y



Click on **Done** and **New Row**.

Buyer Line

The Buyer is the Organization actually making the request and purchasing the service; such as a school or office. The Buyer Line is the Organization’s expense budget line(s) that represents the final funding for a job that will pay for services. The Buyer Line consists of the Job Cost Fund, the Area Code for budget and accounting purposes, the Org. Code used to identify each school and office, and the Program Code used to identify which budget account will be expended.

Type or choose from the Detail Menu “**Buyer**” in the **Fund Line** field. Click in the **Buyer Line** field and enter the Buyer Line in a string without spaces or dashes. AWMS will enter the dashes when you **Save** the record.



Fund Line	Craft	Seller Line	Buyer Line	Fixed	Buyer%	Seq
SELLER		009-AMO-1422-9771				
BUYER						

Fund Line: Seller Line:

Buyer Line: Craft: Fixed: Buyer%: Seq:

Buttons: New Row, Done, Delete

Click on **Done**.

Save Record

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. Enter ATU, PLANNING, INSPECTION, MAIN/FA, and SUB/FA tasks (if applicable)

The Analyst or Designee performs this function.

Plans Tab

Click on the **Plans Tab** to the right of the Work Order tab.

Work Order Tracking Site: LAUSD Start Center Go To Sign Out

Current Query: Quick Key Search Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents Design Info

Work Order: 3998038 REMOVE AND REPLACE DETERIORATED WINDOW FRAMES AND SASH Parent WO: Job No.: PEGPROJX

Location: 4616 HUMPHREYS ELEMENTARY WO Priority: 3 IFS Proj ID: 1ZJ48

Equipment: Loc.Eq Priority: 0 Activity Set:

The Plans tab is divided into three sections. The upper section of the screen displays **Child Work Orders** which will be your building level work orders. The middle portion of the screen is where **Tasks** are created. The bottom portion of the screen will be used for estimating **Labor, Materials/Services** and **Tools**.



The screenshot shows the Maximo Work Order Tracking interface. At the top, the 'Work Order' is identified as 3998038 with the description 'REMOVE AND REPLACE DETERIORATED WINDOW FRAME'. The status is 'PLANCON' and the parent work order is 'PEGPROJX'. Below this, the 'Work Order 3998038's Children' section displays a table with one entry: Sequence 1225073, Description 'Predicted Renewal for Exterior Windows, Auditorium Bld', Location 18267, and Status 'PLANCON'. A callout box points to the 'New Row' button at the bottom right of this table, stating 'Tasks are created here.' Below the children table is the 'Tasks for Work Order 3998038' section, which is currently empty. A callout box points to the 'New Row' button here, stating 'Material/Contract Estimates are created here.' At the bottom, the 'Plan for Work Order 3998038 and its Tasks' section has tabs for 'Craft/Labor', 'Materials/Service', and 'Tools'. The 'Craft/Labor' tab is active, showing an empty table. A callout box points to the 'New Row' button here, stating 'Labor Estimates are created here.'

New Row

Click on **New Row** at the bottom right of this data box to begin each **Task**. The **Task Information** section opens below the Task Summary Bar.

This screenshot shows the 'Tasks for Work Order 3998038' interface. A table at the top shows one task with Sequence 10, Description 'PLANNING FOR R/R DETERIORATED WINDOW FRAMES', Duration 10:00, and Status 'WAPPR'. Below the table, the 'Task Information' section is expanded. It includes fields for 'Task ID' (10), 'Description' (PLANNING FOR R/R DETERIORATED WINDOW FRAMES), 'Sequence' (empty), and 'Duration' (10:00). A callout box points to the description field, stating 'Type in the description of each of the tasks (i.e. PLANNING - description of work)'. Another callout box points to the duration field, stating 'Estimate the Duration.' Below this is the 'Work Reference Information' section, which includes 'Target Start' (3/1/09 12:00 AM), 'Actual Start' (empty), 'Remaining Dur' (empty), 'Target Finish' (5/1/09 12:00 AM), and 'Actual Finish' (empty). At the bottom, there are fields for 'Location' (4616, HUMPHREYS ELEMENTARY), 'Category Code', 'Reference WO' (3517866), and 'Status' (WAPPR). A callout box points to the 'Task ID' field, stating 'The system automatically generates a Task ID.' At the bottom right, there are buttons for 'New Row', 'Done', and 'Delete'.



Task ID The system automatically generates a **Task ID** for each Task in increments of ten.

Description Click on the **Description** field next to the Task ID field and type the description of each of the tasks (i.e. PLANNING – *description of work*, INSPECTION - ..., MAIN/FA -, etc...). **Note: Begin with ATU Tasks. ATU Phase I-II is always task 10 and ATU Phase 3 is task 20 (refer to PEG ATU Task procedure handout).**

Duration Enter the number of hours estimated for the Task in the **Duration** field. When estimating for more than one employee on a Task, enter the actual number of hours the Task will take. For example, if two employees are working on the same Task for 8 hours; enter 8 hours in the Duration field rather than 16 hours.

Note: Fill in the Duration field of each Task before entering the corresponding Labor estimate. The Duration field in the Task line auto-populates the Hours field in the corresponding Labor line.

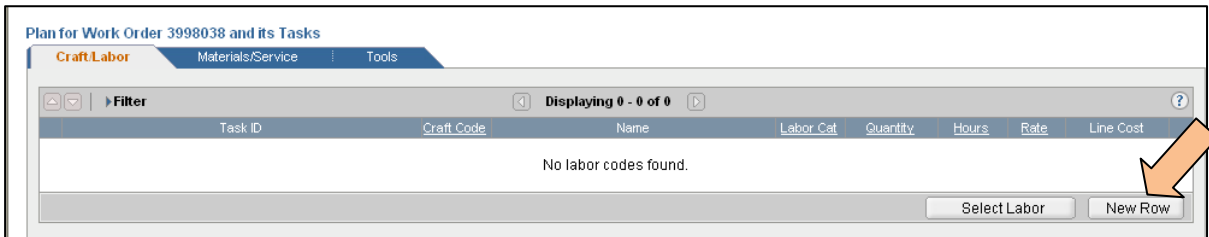
***Repeat step for each task.**

Save Record 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.**"

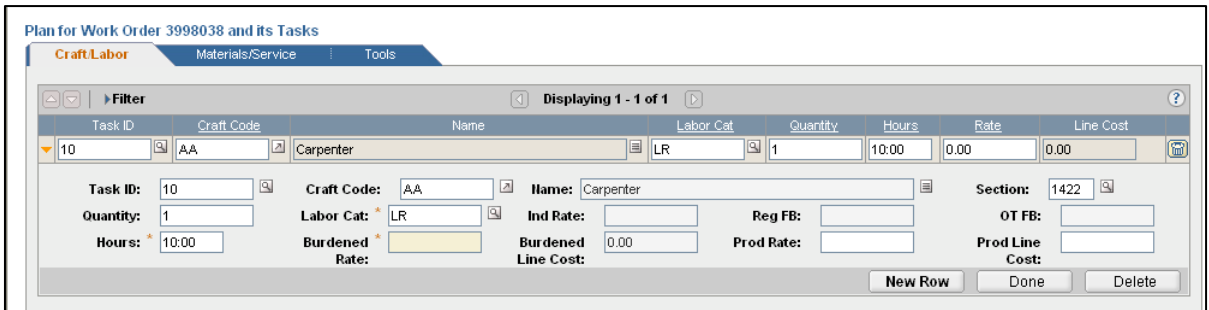
Plan the **Labor/Material/Contract** Estimate for each of the Task(s).

Labor

New Row Click on **New Row** to begin.



Enter values for the following fields, **Task ID, Craft Code, Section, Quantity, Labor Cat and Hours**






Section Code The four-digit Section Code auto-populates from the **Section Code** field on the Work Order tab. Verify that the Section Code is correct.

Task ID Enter the **Task ID** that corresponds to the **Task** you are estimating Labor for (sample is Task ID 10). Tab to the next field. The Hours field auto-populates.

Craft Code Enter your Labor Group’s two-letter Craft Code in the **Craft Code** field and **tab** to the next field. The system automatically populates the **Craft Name** field.

Quantity The system automatically generates **1** in the **Quantity** field, but it can be changed to any number of employees you estimate will be needed on the Task. Match the Duration to the Labor Hours estimate to reflect the number of hours the Task will actually take to perform.

Labor Category Type in or choose from the dropdown , **LR** for regular time or **LO** for overtime.

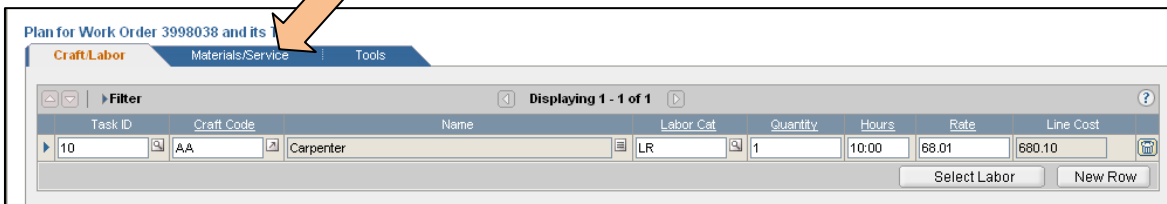
Hours Labor **Hours** automatically populate from the corresponding Task (Duration field). To change the number of hours estimated, click inside the Hours field and type in the number of hours. The costs will populate after the record is Saved.

***Repeat step for each additional Material/Contract/Mileage cost.**

Save Record 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.**”

Material/Contract/Mileage

Click on the **Materials/Service** Tab to the right of the **Craft/Labor** Tab.



New Row Click on **New Row** to begin.



Plan for Work Order 3998038 and its Tasks

Craft/Labor Materials/Service Tools

Filter Displaying 1 - 1 of 1

Task ID	Mat Cat	Craft	Item	Description	Quantity	Unit Cost	Line Cost	Storeroom	Direct Issue
10	MI	AA	Mileage	Mileage	50.00	0.00	0.00		<input checked="" type="checkbox"/>

Task ID: 10 Item: Mileage Section: 1422

Quantity: 50.00 Order Unit: Ind Rate: Mat Cat: MI

Avg Cost: 0.38 Burden Unit Cost: 0.00 Burden Line Cost: 0.00 Craft: AA

Storeroom: Direct Issue? Vendor: Vendor W0#: STK Cat:

Issue To: Required Date: Requested By: DLU123

PR: PR Line:

New Row Done Delete

Task ID Enter the **Task ID** number that corresponds to the first Task for your Craft. This enables a Materials Report to be run by Craft on the reference Work Order.

Description Enter a brief **Description** of the Material/Contract/Mileage item. Ex. Formal Contract, AB Letter Contract, Mileage, Carpentry Material.

Quantity The system automatically provides “1”, but you can change to quantify estimate.

Ind Rate Materials are *burdened (**Indirect Rate**) at 1.177. Contracts, Mileage or Other are not burdened.

Material Category Click on the spyglass icon to the right of the **Material Category** field for options. Type in **MA** for Materials or go to the spyglass and choose Select Value for other options. If an A or B Letter is being used for material purchasing, select the **CO** (Contract) option. If Mileage is being charged to a Task, select the **MI** (Mileage) option. There is also an **OT** (Other) option, which is unburdened.

Avg Cost Enter the Total Estimated **Cost** of Materials for the corresponding Task Line.

Craft Enter the Labor Group’s two-letter Craft Code in the **Craft Code** field and **tab** to the next field. The system automatically populates the Craft **Name** field.

Save Record 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.**”

6. Print Planner Data Entry Report

For those task(s) that require a job ticket, perform the following steps.

Find Screen Navigate back to the find screen in Work Order Tracking and enter the *Parent* Work Order number to change the status.

Plans Tab Click on the **Plans Tab** to the right of the Work Order tab.



Work Order Tracking Site: LAUSD Start Center Go To Sign Out

Current Query: Quick Key Search Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents Design Info

Work Order: * 3998038 REMOVE AND REPLACE DETERIORATED WINDOW FRAMES AND SASH Parent WO: Job No.: PEGPROJX
Location: 4816 HUMPHREYS ELEMENTARY WO Priority: * 3 IFS Proj ID: 1ZJ48
Equipment: Loc.Eq Priority: 0 Activity Set:

Click on the **blue arrow** of the task you wish to print out a **Planner Data Entry** report for to retrieve the reference work order number.

Tasks for Work Order 3998038 Filter Displaying 1 - 2 of 2

Sequence	Mat Cat	Craft	Task ID	Description	Duration	Status
10	MI	AA		PLANNING - R/R DETERIORATED WINDOW FRAMES AND	10:00	WAPPR
20				INSPECTION - R/R DETERIORATED WINDOW FRAMES AND SASH	5:00	WAPPR

Task Information
Task ID: * 10 PLANNING - R/R DETERIORATED WINDOW FRAMES AND Sequence: Duration: * 10:00

Measurement Information
Observation: Inspector: Measurement Date:

Work Reference Information
Schedule Start: Target Start: 3/1/09 12:00 AM Actual Start: Remaining Dur:
Schedule Finish: Target Finish: 5/1/09 12:00 AM Actual Finish:

Location: 4816 HUMPHREYS ELEMENTARY Category Code: Reference WO: * 3517866
Equipment: Routing Code: Status: * WAPPR

Click on the detail menu arrow to the right of the Reference WO and click the **Move to: WO number**

Tasks for Work Order 3998038 Filter Displaying 1 - 2 of 2

Sequence	Mat Cat	Craft	Task ID	Description	Duration	Status
10	MI	AA		PLANNING - R/R DETERIORATED WINDOW FRAMES AND	10:00	WAPPR
20				INSPECTION - R/R DETERIORATED WINDOW FRAMES AND SASH	5:00	WAPPR

Task Information
Task ID: * 10 PLANNING - R/R DETERIORATED WINDOW FRAMES AND Sequence: Duration: * 10:00

Measurement Information
Observation: Inspector: Measurement Date:

Work Reference Information
Schedule Start: Target Start: 3/1/09 12:00 AM Actual Start: Remaining Dur:
Schedule Finish: Target Finish: 5/1/09 12:00 AM Actual Finish:

Location: 4816 HUMPHREYS ELEMENTARY Category Code: Reference WO: * 3517866
Equipment: Routing Code: Status: * WAPPR

Move to: 3517866

By clicking on the **Move to: WO number**, the system will take you to that work order number.



Click on the **Work Order** tab and enter the **Requestor's Name (Plus OAR Initials)** and **Title, Section, IFS Number, Category Code, and Routing Code**. If there is only one building assigned, change the location to the building level by using the drop down list next to the **Location** field.

Save Record

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.”**

Click on the **WO Details** tab to enter the description you wish to see in the **Planner Data Entry** report in the **IFS Work Requested** field, and the **Buyer/Seller** lines (Instructions on Page 10). In addition, change **IFS Category** and add the **IFS Project Number** in the Fund Details section.



The screenshot shows the Maximo Work Order Tracking interface. The 'WO Details' tab is active. Fields include: Work Order: 3517866, Location: 4616, Org Code: 4616, Parent WO: 3998038, Job No.: PEGPROJX, WO Priority: 1, Status: WAPPR, Failure Class: , Status Date: 3/13/09 11:01 AM, CPM: BATES, ART, CPM Phone: 323-224-4500, Problem Code: , Work Type: DFR, Requestor: TIM GODAR, School Phone: 323-263-6958, Tracking Code: , Originating WO: , Req. Title: ROOFING TECH. SUP, Resp Area: AREA-5, Lead Craft: . The 'Lifecycle Data' section includes fields for Orig Plan Yr, Remaining Life, Est Cost Sq Ft, Total Est Cost, Frequency, Current Plan Yr, Next Renewal YR, Est/Cal Sq Ft, Project Score, Last Ren, Life Used, and Life Left. The 'Fund Details' section includes Fund Priority: RT, Fund Type: DEFMAINT, Fund Ref: , IFS Cause: DET, IFS Catgry: CM, IFS Proj No: , Bill: I, Inc: Y, Program: 9771, Job Type: DR, Adult: N, Frg: Y, and IP: Y. A table at the bottom shows 'No Buyer/Sellers found' with a 'New Row' button.

Save Record

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.”**

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

This screenshot shows the 'Select Action' menu open over the same Maximo interface. The menu options include: Change Status, Route Work Order, Stop Workflow, View Status/Workflow History, View Workflow Help, Generate Follow-up Work, Apply Route, Assign to New Parent, Move Equipment, Remove Work Plan, Select Safety Hazards, Remove Safety Plan, Report Downtime, View Follow-up Work, View PO Information, View Costs, View Entire Plan, Edit History Work Order, Run Reports, Work Order Details Report, Print with Attachments, Duplicate Work Order, Delete Work Order, and Add To Bookmarks. The 'Run Reports' option is highlighted with an orange arrow.

Print the Planner Data Entry Report



A separate window opens which lists the available reports for the active application. Click on the report titled **Planner Data Entry** Report.

Report Name	Version	Last Modified
Design5	Version 1	2/16/2005 12:35 PM
Design6	Version 1	2/16/2005 1:26 PM
Dtest	Version 1	5/9/2007 5:20 PM
Facilities_Condition_Assessment	Version 4	3/4/2008 2:43 PM
Job_Cost_Recap_addEmail_func.chg	Version 13	9/5/2007 9:06 AM
Job_Cost_Recap		3/19/2008 8:41 AM
Material_Plan_List		11/10/2004 1:58 PM
Material_Post_Pick_List		11/10/2004 2:42 PM
MAXRTTEST_Rnase		6/5/2007 4:04 PM
Monthly_Labor_Summary		7/25/2007 8:49 AM
Monthly_Time_Allocation	Version 1	8/29/2008 3:09 PM
NonRRWorkOrderAging_Dev	Version 1	6/8/2004 10:44 AM
Open_RR_Calls_ByResp	Version 1	4/8/2004 11:33 AM
Open_RR_Calls_ByResp_1	Version 1	4/22/2005 5:10 PM
Open_RR_Calls_ByResp_ByCraft_1	Version 1	4/8/2004 11:33 AM
Open_RR_Calls_ByResp_Param	Version 1	3/16/2005 4:49 PM
Overtime_Request	Version 1	7/25/2007 8:49 AM
PestMgtTroubleCalls	Version 1	3/8/2004 1:39 PM
Phase_Sub_Project_Phase	Version 1	9/21/2006 8:35 AM
Phase_Sub_Project_Proj	Version 1	9/14/2006 5:04 PM
Phase_Sub_Project_Proj_Inv_RDP	Version 1	9/14/2006 8:15 PM
Planned_Estimate_Ap[roval]	Version 1	2/17/2005 11:25 AM
PlannerDataEntry	Version 2	6/21/2007 9:36 PM
Planner_Data_Entry	Version 1	3/9/2009 3:22 PM
Planning_List_status	Version 1	11/11/2004 1:21 PM
Planning_List	Version 2	6/13/2008 1:10 PM

Enter the task **Work Order Number** and click **Submit**.

Reporting
maximo

Planner Data Entry Request Page

Query:

- Current Record
- Selected Record
- All Records

Enter a Work Order Number

Print Modified?

Print the **Planner Data Entry** Report



Reporting

Page: 1 of 1 75%

LOS ANGELES UNIFIED SCHOOL DISTRICT - JOB ORDER DRAFT WQM 3517866

PlannerDataEntry_act - Microsoft Internet Explorer

Click on the Print icon in the AWMS toolbar.

Reporting Home Close Report Help

Print - PlannerDataEntry_act - Microsoft Internet Explorer

Choose the print icon within the Adobe window to print the AWMS Planner Data Entry Report

Print

Printer: HP LaserJet 2300 Series PCL 6

Status: Ready

Type: HP LaserJet 2300 Series PCL 6

Print Range: All

Page Handling: Copies: 1, Page Scaling: Fit to Printer Margins

Preview: 8.5 x 11 inches, 96% zoom

Units: Inches, 1/1 (1)

OK Cancel

Printed: 10:00 AM 3/1/08

Done Trusted sites

SEQUENCE	Ln	LA	LABOR	CONTRACT:	\$0.00	INDIREC
	1	R	LABOR	LABOR:	\$361.00	FRINGE BEN
	2	MIL	MATERIALS	MILEAGE:	\$19.00	FRINGE BEN
			MATERIALS:	IMPRES:	\$0.00	FRINGE BEN
			OTHER:	SUB TOTAL:	\$410.00	
					TOTAL:	\$699.10

***Repeat step for each Task Work Order you wish to create a Job Number.**

7. OBTAIN REQUIRED SIGNATURES AND CREATE JOB NUMBER IN IFS

The Analyst or Designee performs this function.

Submit **Planner Data Entry** report(s) to AFSD or Designee for signature approval. Encumber funds and create job number in IFS.

8. UPDATE JOB NUMBER FOR EACH TASK AND CHANGE STATUS TO INPRG

The Analyst or Designee performs this function.

Find Screen

Navigate back to the find screen in Work Order Tracking and enter the *Task Work Order* number to change the status.



Work Order Tracking

Current Query: All Work Orders 3517866 Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents Design Info

Find Advanced Search Bookmarks Results

Work Order: 3517866 Job No.:
 Location: HUMPHREYS ELEMENTARY IFS Proj ID:
 Equipment: Activity Set:

Job Number

Delete the dummy Job Number (PEGPROJX) in the Job No.: field and replace it with the one created in IFS.

Work Order Tracking

Current Query: Quick Key Search Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents

Work Order: 3517866 PLANNING - R/R DETERIORATED WINDOW FRAMES AND SASH Parent WO: 3998038 Job No.: PEGPROJX
 Location: 4616 HUMPHREYS ELEMENTARY WO Priority: 1 IFS Proj ID:
 Equipment: Loc/Eq Priority: 0 Activity Set:

Work Order Tracking

Current Query: Quick Key Search Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents

Work Order: 3517866 PLANNING - R/R DETERIORATED WINDOW FRAMES AND SASH Parent WO: 3998038 Job No.: GS123456
 Location: 4616 HUMPHREYS ELEMENTARY WO Priority: 1 IFS Proj ID:
 Equipment: Loc/Eq Priority: 0 Activity Set:
 Section: Internal Order No.: Planning Priority: Work Type: DFR
 School Name: HUMPHREYS AVE EL Reported Date: 3/13/09 11:01 AM In Workflow? Org Code: 4616
 Requestor: TIM GODAR Status: WAPPR Equipment Up? Tracking Code:
 Req. Title: ROOFING TECH. SUP Status Date: 3/13/09 11:01 AM Warranty: School Phone: 323-263-6958
 Is Task? [checked] Respond By: 6/11/09 12:01 PM Charge To Store? Cafeteria Phone: 323 269-1447
 Agency: Agency ID: Change Status on Child WO's? [checked] Responsible Area: AREA-5
 Agency Date: Service Call? (Y/N): N Complex Name: GARFIELD
 GL Account: 009-AMO-1422-9711 Source ID: Calc. Priority: 1 Board Mem Dist: 5

Change Status

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

Work Order Tracking

Current Query: Quick Key Search Select Action

Search Work Order Plans WO Details Assignments Actuals Safety Plan Failure Reporting Attached Documents Design Info

Work Order: 3517866 PLANNING - R/R DETERIORATED WINDOW FRAMES AND SASH Parent WO: 3998038 Job No.: GS123456
 Location: 4616 HUMPHREYS ELEMENTARY WO Priority: 1 IFS Proj ID:
 Equipment: Loc/Eq Priority: 0 Activity Set:

Select **IN PROGRESS (INPRG)** from the drop down list and hit **OK**.

Change Status


Work Order: 3517866 Description: PLANNING - R/R DETERIORATED WINDOW FRAMES AND SASH
 Current Status: WAPPR

New Status: In Progress (INPRG)
 Date Changed: Memo:
 Waiting on Material (W) [unselected]
 In Progress (INPRG) [selected]
 Approved (APPR)
 Canceled (CAN)
 Closed (CLOSE)

OK Cancel



Save Record

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.”**

***Repeat step for each Task Work Order that has a new job number.**

As each task commences and ends, change the statuses accordingly.

Status	Description
WAPPR	First status assigned when task is created.
INPRG	Status when task starts and/or job number is updated.
COMP	Status when task is complete

The screenshot shows the Maximo Work Order Tracking interface. At the top, there's a navigation bar with tabs like 'Search', 'Work Order', 'Plans', 'WO Details', etc. The main area displays a 'Work Order' for 'REMOVE AND REPLACE DETERIORATED WINDOW FRAME' with status 'PLANCON'. Below it, a table lists tasks for this work order. The first task is 'PLANNING - R/R DETERIORATED WINDOW FRAMES AND SASH' with status 'INPRG'. An orange arrow points to the 'INPRG' status cell in the table. A 'Change Status' dialog box is open over this task, showing the 'Current Status' as 'INPRG' and a dropdown menu for 'New Status' with options: 'Waiting on Approval (WAPPR)', 'Waiting on Material (WAPPR)', 'Closed (CLOSE)', 'Completed (COMP)', and 'Rework Job (REWORK)'. Two orange arrows point to the 'Completed (COMP)' option in the dropdown and the 'OK' button at the bottom of the dialog.



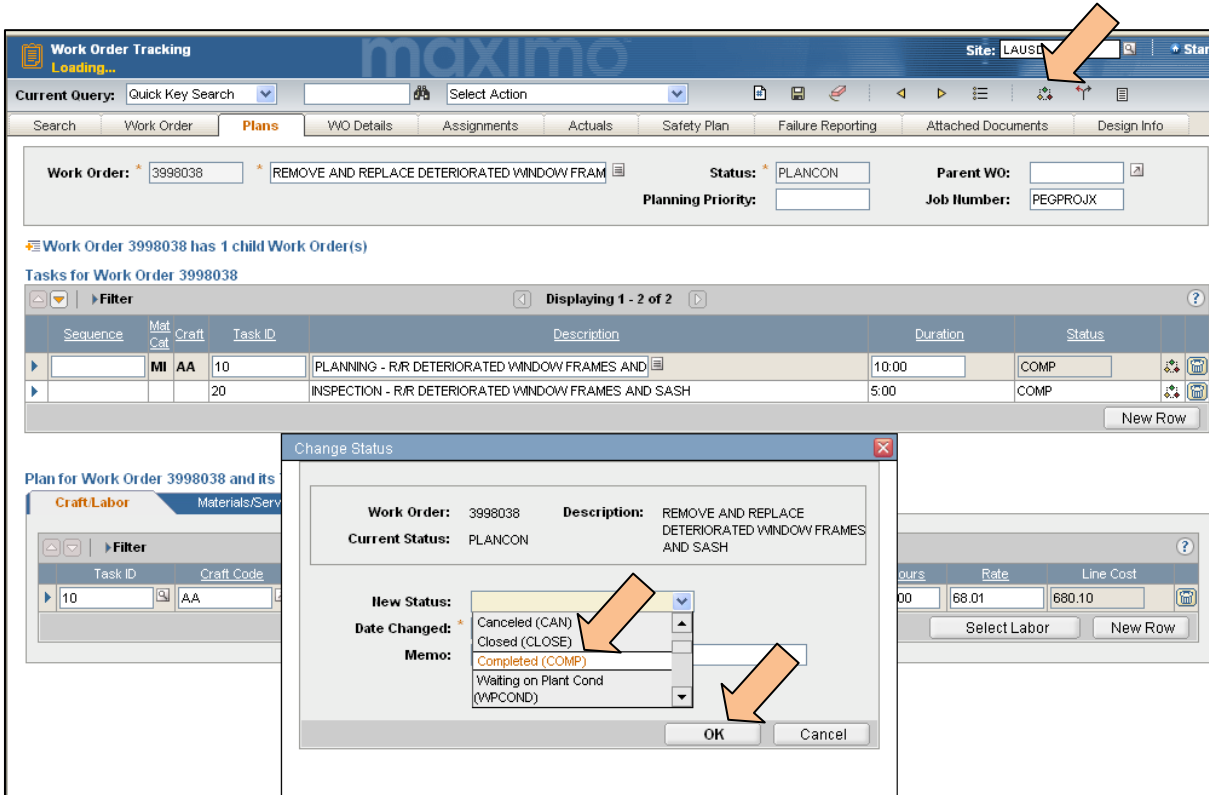
When all **tasks** are **Complete (COMP)**, change the **Parent Work Order** status to **Complete (COMP)**.

Find Screen

Navigate back to the find screen in Work Order Tracking and enter the *Parent* Work Order.

Change Status

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



The screenshot displays the Maximo Work Order Tracking interface. At the top, the 'Work Order Tracking' header shows the current query as 'Quick Key Search' and the selected action as 'Select Action'. The main area shows details for Work Order 3998038, including its description 'REMOVE AND REPLACE DETERIORATED WINDOW FRAM...', current status 'PLANCON', and parent work order 'PEGPROJX'. Below this, a table lists tasks for the work order, with two tasks shown: 'PLANNING - R/R DETERIORATED WINDOW FRAMES AND...' (Task ID 10, Duration 10:00, Status COMP) and 'INSPECTION - R/R DETERIORATED WINDOW FRAMES AND SASH' (Task ID 20, Duration 5:00, Status COMP). A 'Change Status' dialog box is open, showing the work order details and a dropdown menu for the 'New Status'. The 'Completed (COMP)' option is selected in the dropdown. The dialog also includes fields for 'Date Changed' and 'Memo', and 'OK' and 'Cancel' buttons. An arrow points to the 'Change Status' icon in the toolbar, and another arrow points to the 'Completed (COMP)' option in the dropdown.