

Los Angeles Unified School District

**AWMS Maintenance and Operations  
Sequential Planning Guide – 02 Changes**

---

## LAUSD AWMS Maintenance and Operations 02 Change Instructions

### 1. Change Identified

The need for a 02 Change requests may be identified by a number of different parties. For example, the Crafts may encounter unforeseen conditions at the job site which may change the material and/or labor cost requiring additional funds to complete the project. The Area Facilities Services Director, Complex Project Manager or Principle Clerk may be the first to identify an overcharge on a job when reviewing IFS or cost reports that will require additional funds to close out the job ticket.

### 2. Approval to Initiate a 02 Change

Approval must be obtained from the Area Facilities Services Director or Designee prior to initiating a 02 Change in AWMS. Supporting documents/justification is required when requesting additional funds. Approval may be received verbally and/or in a written notice.

### 3. Retrieve Work Order number and add the 02 Change justification to the IFS Work Requested field in the WO Details Tab

*The CPM or Designee performs this function.*

Retrieve the Work Order number and proceed to update the **IFS Work Requested** field in AWMS.

#### Log On

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



LAUSD Facilities Information System  
Assets and Work Management

Welcome to PRODUCTION

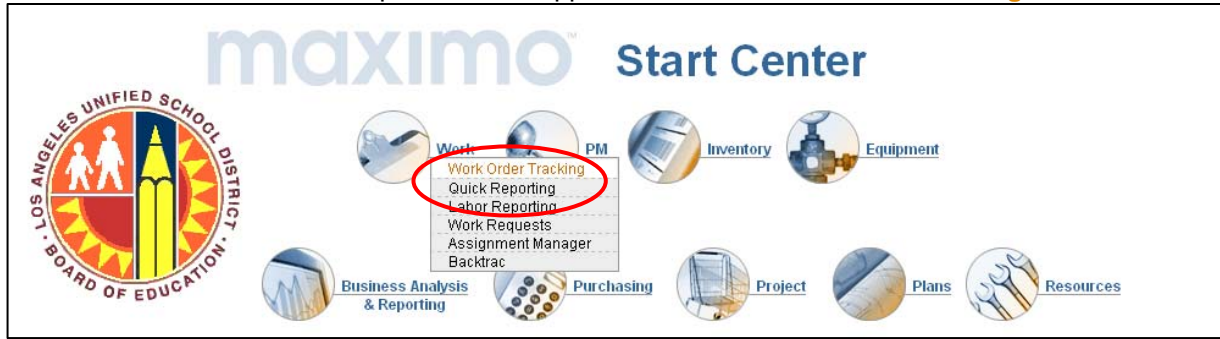
Powered by Maximo ©  
MRO Software™

user name  password

change password

**Start Center**

AWMS opens to the **Start Center**. Place the cursor over the **Work Orders** Module and a dropdown menu appears. Choose **Work Order Tracking**.



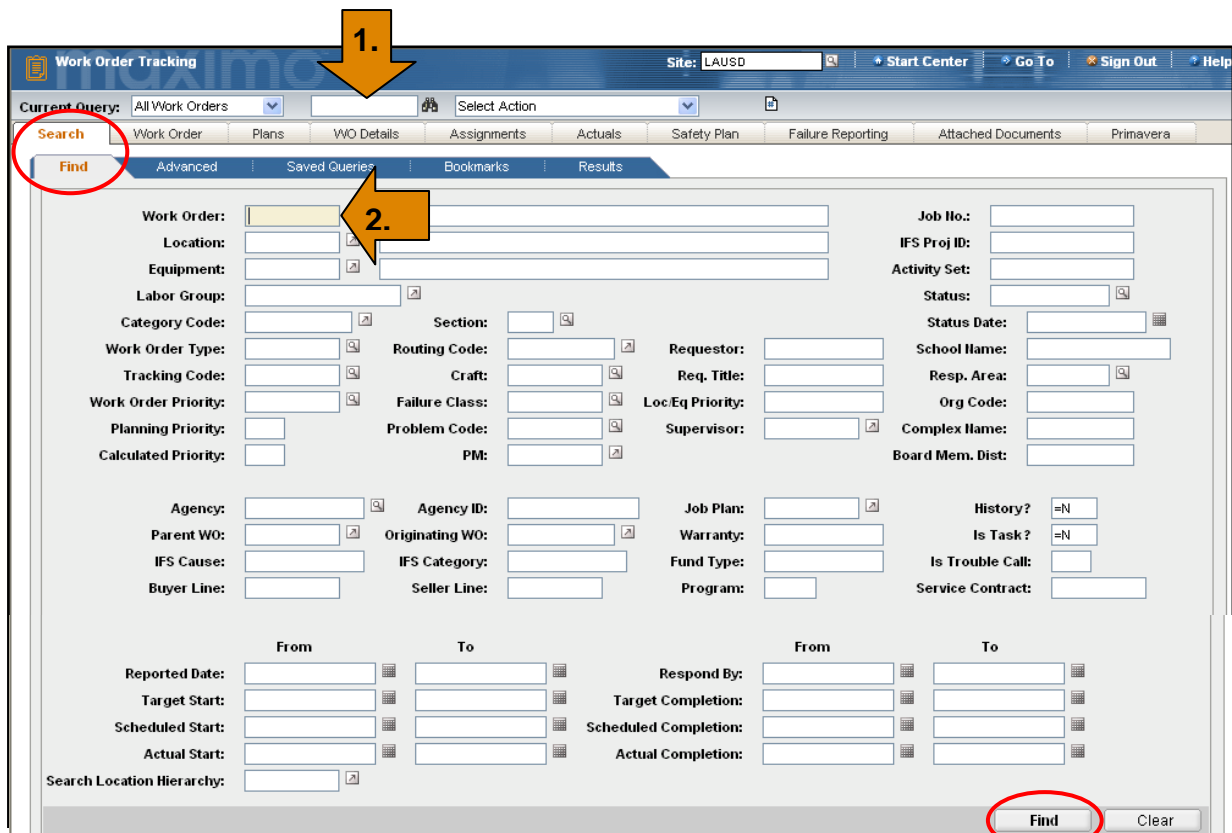
**Find Screen**

The Work Order Tracking application opens to a **FIND** screen.

1. Enter the **Parent Work Order** number in the “**Quick Key Search**” field and click on the **Binoculars**  icon or hit **Enter** on your keyboard.

OR

2. Enter the **Parent 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.



When the work order appears, click on the **WO Details** tab.

Work Order Tracking Site: LAUSD

Current Query: Quick Key Search

Search Work Order Plans Assignments Actuals Safety Plan Failure Reporting Attached Documents DSA Info

Work Order: \* 4028823 \* P&I PROJECTION SCREENS USING KEYSTONE BRACKETS IN ROOMS 35  
 Location: 19740 TWO/THREE UNIT RELOCATABLE  
 Equipment: Parent WO: Job No.: JM002550  
 WO Priority: \* 1 IFS Proj ID:  
 Loc:Eq Priority: 0 Activity Set:

Insert the 02 Change justifications at the end of the original IFS Work Requested description. For example, "...02 Change for 10 additional labor hours and mileage for carpentry work."

Work Order Tracking Site: LAUSD

Current Query: Quick Key Search

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

Work Order: \* 4028823 \* P&I PROJECTION SCREENS USING KEYSTONE BRACKETS IN ROOMS 35  
 Location: 19740 TWO/THREE UNIT RELOCATABLE  
 Org Code: 2375 HUGHES EL  
 Parent WO: Job No.: JM002550  
 WO Priority: \* 1 Status: PCOMP  
 Failure Class: Status Date: \* 2/10/09 8:00 AM  
 CPM: JOE HERRERA JR CPM Phone: 323-569-3123 Problem Code: Work Type: \* AI  
 Requestor: BETH FULLER School Phone: 323-560-4422 Tracking Code: OT Originating WO:  
 Req. Title: PRINCIPAL Resp Area: AREA-6 Lead Craft: AA

**Lifecycle Data**  
 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: Life Left:

**Fund Details**  
 Fund Priority: RT Fund Type: A&I Fund Ref: IFS Cause: OTM IFSNB IFS Proj No:  
 Bill: Ind: Y Program: 9772 Job Type: DR Adult: N Frg: Y HP: Y  
 IFS Work Requested: P&I ONE EACH PROJECTION SCREEN USING KEYSTONE BRACKETS IN RMS . 35 and 36. SCHOOL A&I FUNDED.  
 Project WO:

If there are no additional spaces in the short description, enter the justification in the long description by clicking on the icon and click on **OK** when finish.

Work Order Tracking > Long Description

P&I ONE EACH PROJECTION SCREEN USING KEYSTONE BRACKETS III RMS . 35 and 36. SCHOOL A&I FUNDED,  
 IN HOUSE: 02 CHANGE FOR 10 ADDITIONAL LABOR HOURS AND MILEAGE FOR CARPENTRY WORK.

Check Spelling OK Cancel

**Save Record** Click on the floppy disk icon in the AWMS toolbar to **Save** the record when justification is complete.


Inform Lead Planner or Designee to begin planning the 02 Change in AWMS.

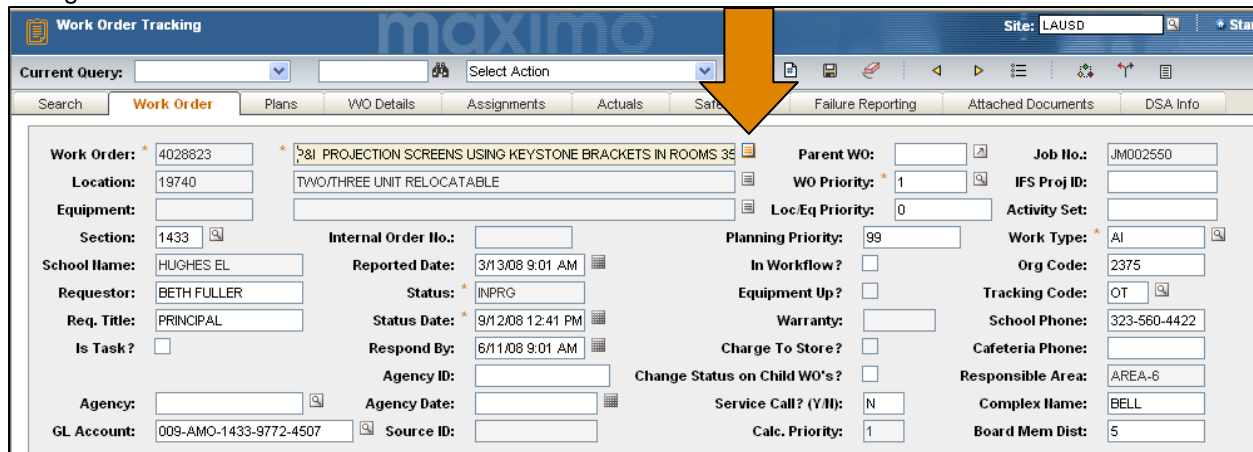
**4. Retrieve Original Planner Data Entry Report and Job Ticket and plan the 02 changes in AWMS.**

*The Lead Planner or Designee performs this function.*

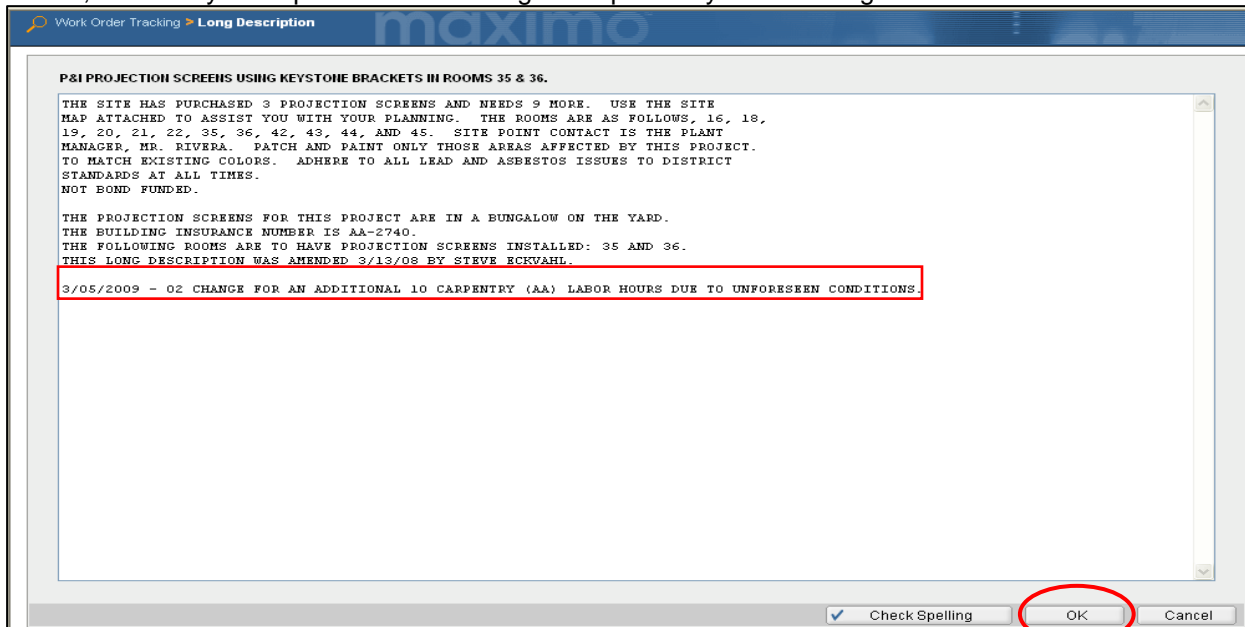
Retrieve the original signed **Planner Data Entry** report and **Job Ticket** from job package and proceed to update the work order in AWMS.

Follow AWMS log in and work order search steps from **page 1-2**.

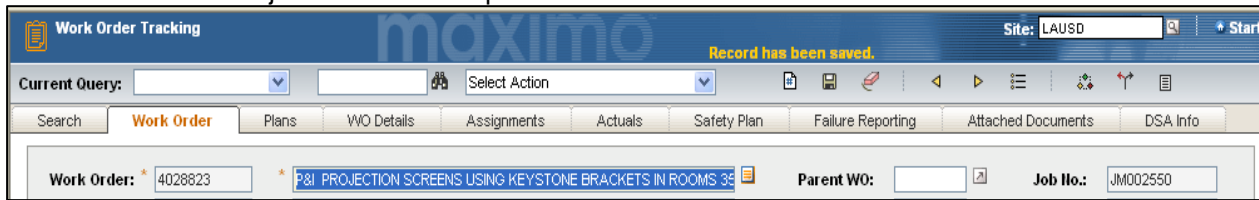
When the work order appears, click on the long description  icon and enter the justification for the change.




Enter the full justification of the change in the long description and click **OK**. For example, “MM/DD/YYYY – 02 Change for an additional 10 Carpentry (AA) labor hours due to unforeseen conditions.” If space is limited, continue your explanation in the long description of your 02 change task line.

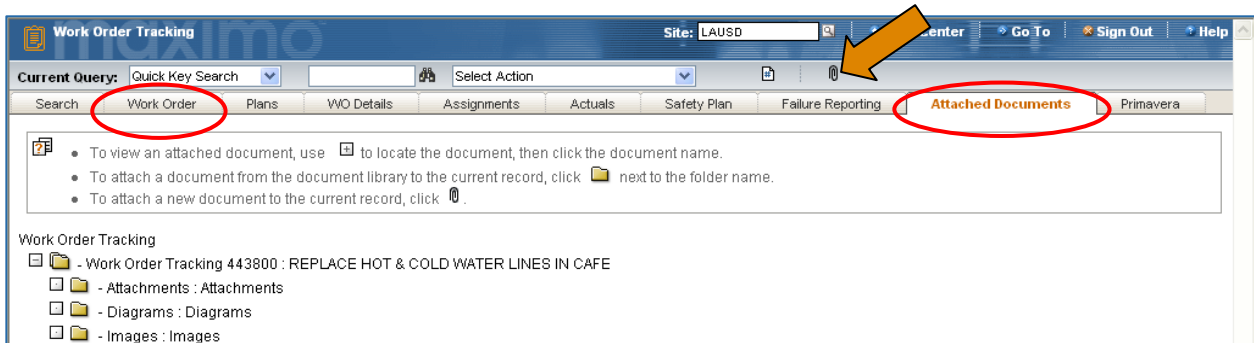


**Save Record** Click on the floppy disk  icon in the AWMS toolbar to **Save** the record when justification is complete.

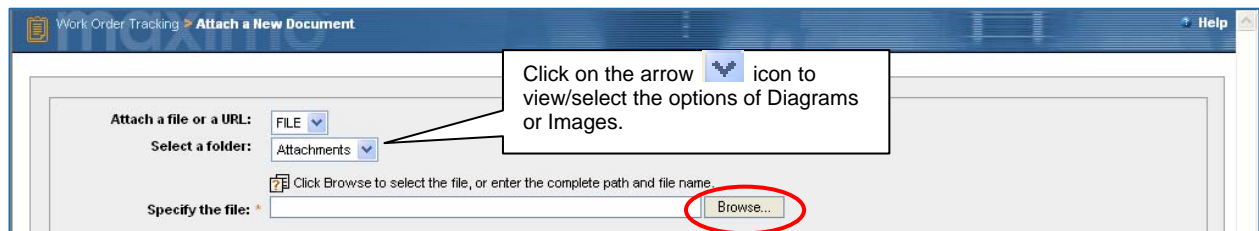


**Attach Documents, Photos, Drawings, etc. in the Attached Documents Tab**

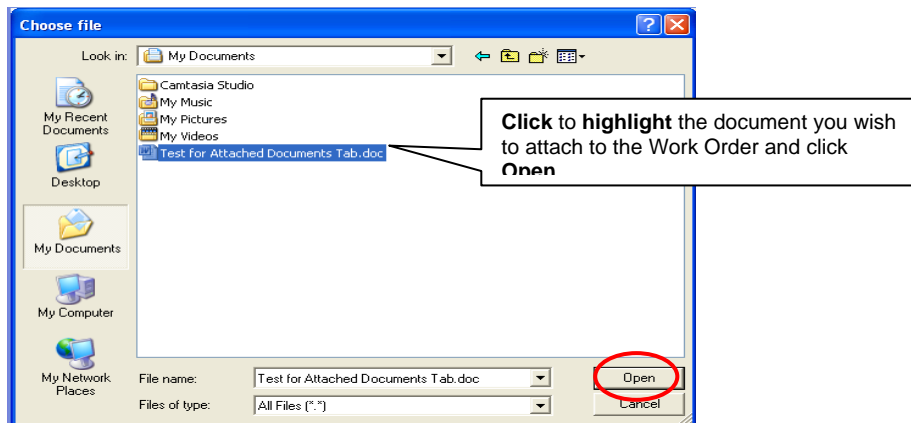
**Attach Documents** (Optional) Attach photos, drawings, etc., if needed for the justification of the change in the **Attached Documents** tab of the Work Order. In the **Work Order** tab, click on the **Attached Documents** tab. Click **Attach a New Document**  icon in the AWMS toolbar.



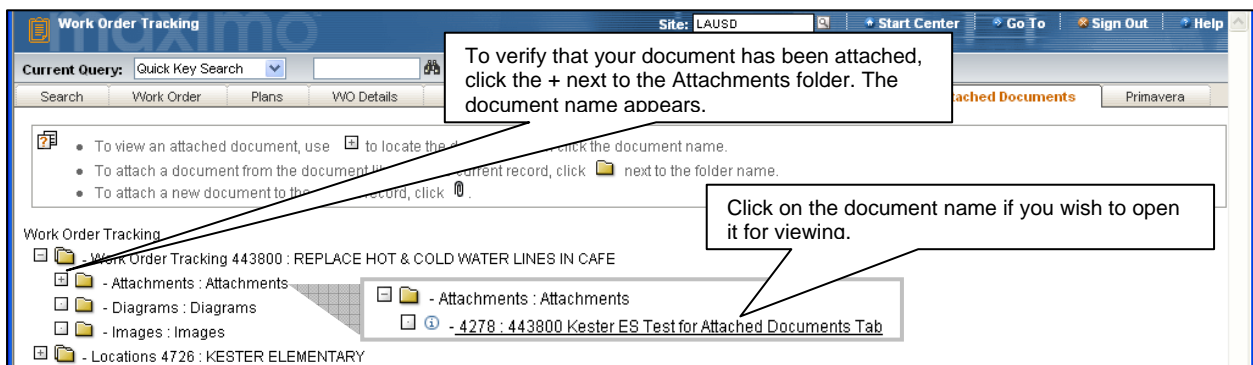
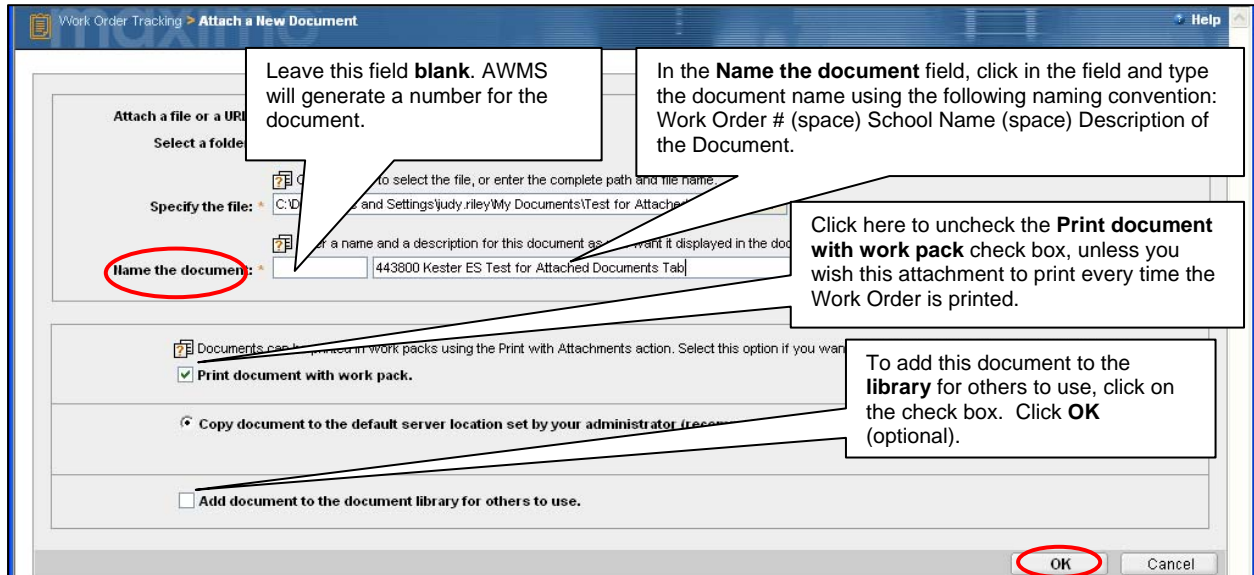
**Attach New Doc.** The **Attach a New Document** page opens. The **Attach a File or Url** field displays **FILE** as the default. In the sample illustrated below, the attachment is a Word Document. However, diagrams or images can be attached as well. In the **Select a folder** field, leave **Attachments**, which is the default. Click on the **Browse** button.



Highlight your selection from the **Choose file** dialog box, and click **Open**.

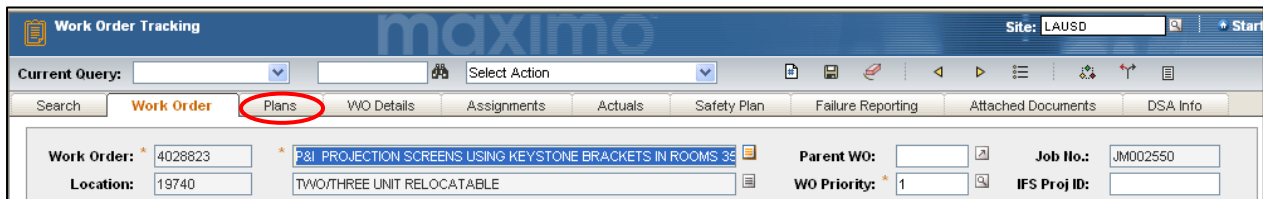


The document path is inserted in the **Specify the file** field.

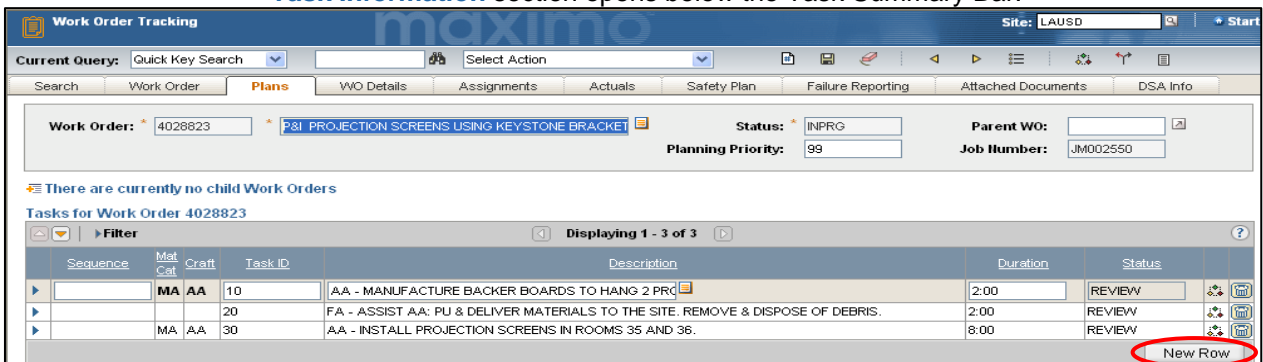


### Create a new “02 Change” Task to the Parent Worker in the Plans Tab

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



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



Enter the 02 change description (ie. AA – 02 Change for 10 more hours) and the duration of the task.

The screenshot shows the 'Work Order Tracking' interface for Work Order 4028823. The 'Tasks for Work Order 4028823' table is displayed with the following data:

Sequence	Mat Cat	Craft	Task ID	Description	Duration	Status
40	MA	AA		AA - 02 CHANGE FOR 10 MORE HOURS	10:00	WAPPR
	MA	AA	10	AA - MANUFACTURE BACKER BOARDS TO HANG 2 PROJECTION SCREENS.	2:00	REVIEW
	MA	AA	30	AA - INSTALL PROJECTION SCREENS IN ROOMS 35 AND 36.	8:00	REVIEW
			20	FA - ASSIST AA: PU & DELIVER MATERIALS TO THE SITE. REMOVE & DISPOSE OF DEBRIS.	2:00	REVIEW

Callouts in the image provide the following instructions:

- Task ID:** The system automatically generates a Task ID.
- Craft Code:** Type in the two-letter Craft Code – "02 Change for xxxxxx"
- Duration:** Estimate the Duration.
- Description:** Optional: If there are additional justifications you would like to add, enter it in the long description.

The 'Done' button at the bottom right is circled in red.

**\*Repeat steps for additional craft changes**

**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."**

**Create the Labor Estimate**

**Craft/Labor**

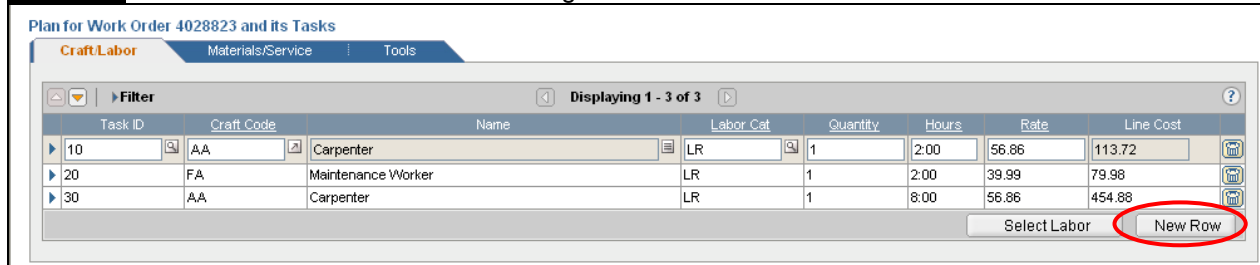
Each "02 Change" Task line shall have a corresponding **Craft/Labor** line entry. Click on the Craft/Labor Tab on the bottom section of your screen.

The screenshot shows the 'Plan for Work Order 4028823 and its Tasks' section with the 'Craft/Labor' tab selected. The labor estimate table is as follows:

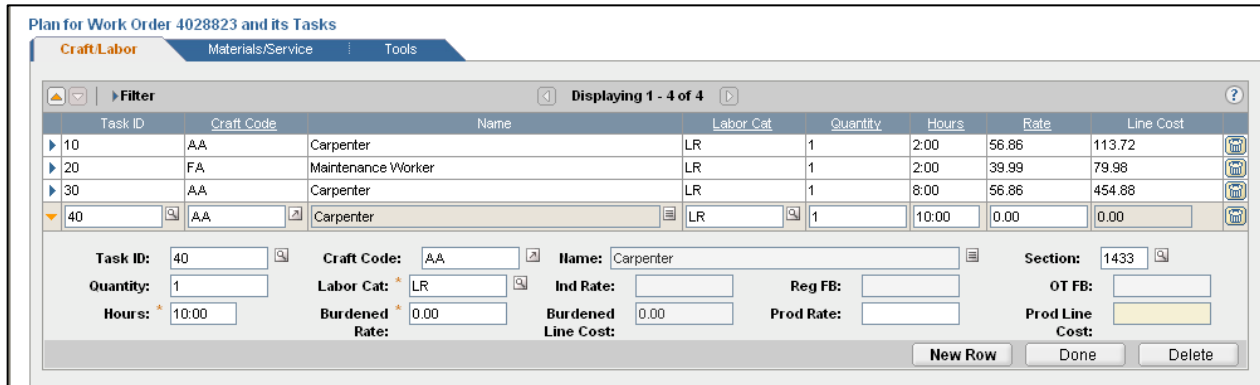
Task ID	Craft Code	Name	Labor Cat	Quantity	Hours	Rate	Line Cost
10	AA	Carpenter	LR	1	2:00	56.86	113.72
20	FA	Maintenance Worker	LR	1	2:00	39.99	79.98
30	AA	Carpenter	LR	1	8:00	56.86	454.88

The 'Craft/Labor' tab is circled in red.

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



Enter all of the required fields: **Section Code, Task ID, Craft Code, Quantity, Labor Category, 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 40). Tab to the next field. The Hours field auto-populates.


**Craft Code**

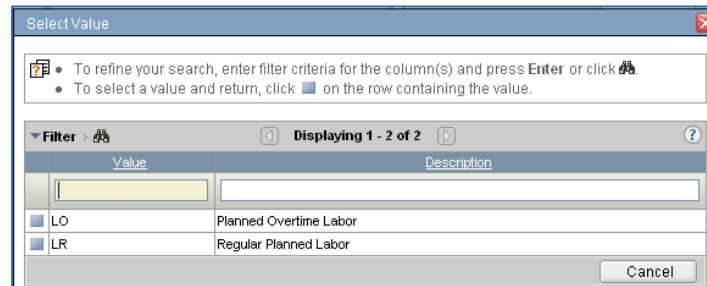
Enter the two-letter Craft Code in the **Craft Code** field and **tab** to the next field. The system automatically populates the Craft **Name** field.

**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.

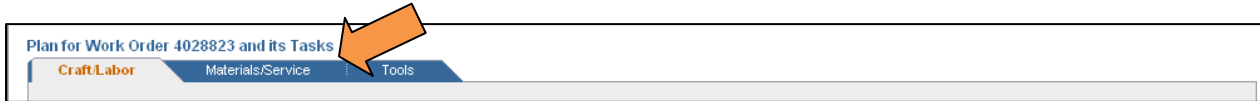
**Save Record**

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.**"

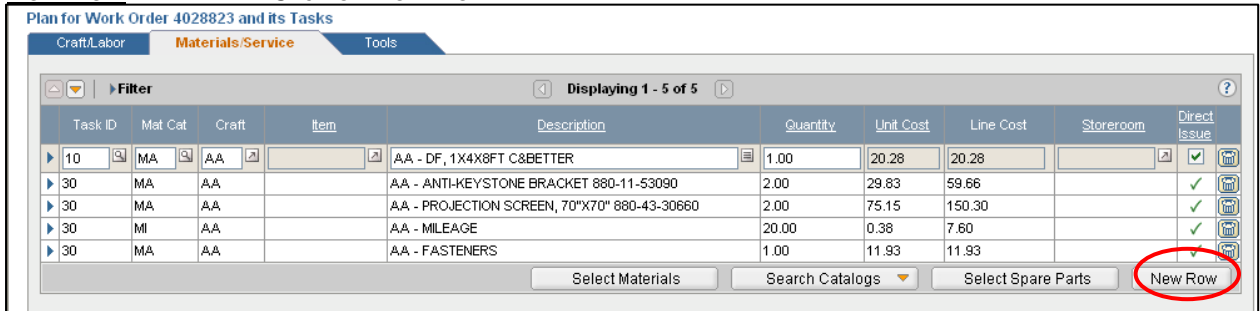
**Create the Material Estimate (If applicable)**

If the 02 Change includes additional material, mileage and/or contract cost, enter those values in the Materials/Service tab.

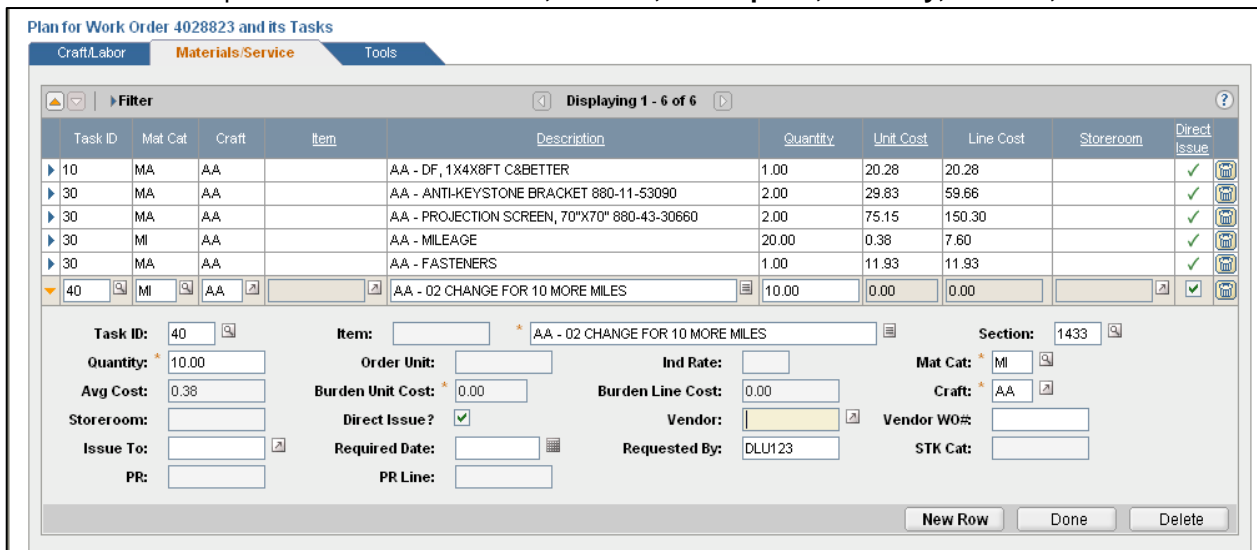
**Materials/Service** Click on the **Materials/Service** Tab to the right of the **Craft/Labor** Tab.



**New Row** Click on **New Row**.



Enter all of the required fields: **Section Code, Task ID, Description, Quantity, Mat Cat, Craft Code**




**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 the two-letter Craft Code, and a brief **Description** of the Material item. For example, AA – 02 Change for 10 more miles


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

**Ind Rate** Materials are \*burdened (**Indirect Rate**) at your sections rate. 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.

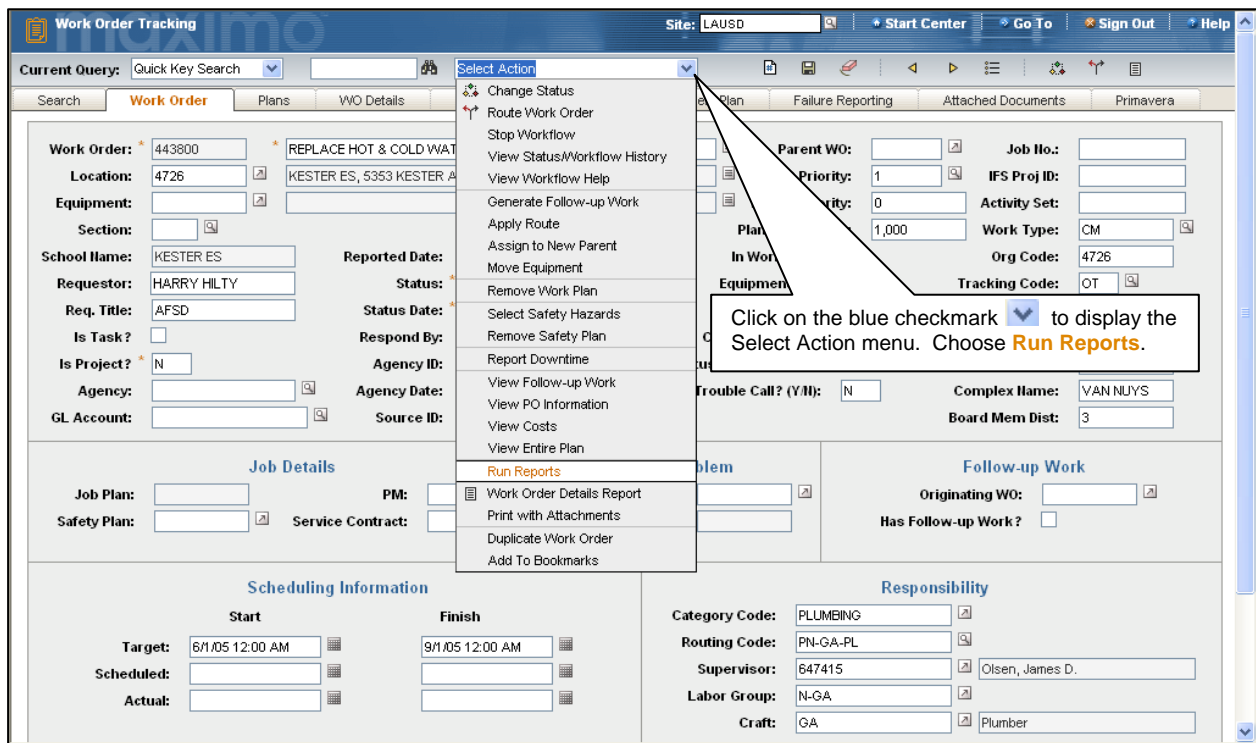
**Save Record** Click on the floppy disk  icon in the AWMS toolbar to **Save** the record. Look for the message at the top of the screen, “**Record has been saved.**”

**Print AWMS Modified Planner Data Entry and 02 Change Worksheet**

*The Lead Planner or Designee will print the Planner Data Entry report and 02 Change Worksheet and route it to the CPM for review.*

**AWMS Work Order** Navigate to the **AWMS Work Order** following the instructions on **Page 2**.

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



**Run the Planner Data Entry Report**

Business Analysis and Reporting  
Powered by ACTUATE  
Tuesday April 11, 2006

Reports

home help

Run Reports

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	Date
<a href="#">AverageHoursInStatus</a>	Version 1	10/7/2004 1:35 PM
<a href="#">BMARCountByMonth</a>	Version 1	9/16/2005 9:03 AM
<a href="#">DailyAssignmentReport</a>	Version 1	8/5/2004 9:54 AM
<a href="#">DailyLaborsummary</a>	Version 1	7/9/2004 3:01 PM
<a href="#">JobCostRecapBatch</a>	Version 1	6/22/2005 3:46 PM
<a href="#">JobCostRecapBurden</a>	Version 1	6/22/2005 4:05 PM
<a href="#">MAC</a>	Version 1	1/10/2005 10:44 AM
<a href="#">MonthlyLaborsumm</a>	Version 1	6/28/2005 1:58 PM
<a href="#">NonRRWorkOrder</a>	Version 1	6/10/2004 4:00 PM
<a href="#">Open_RR_Call_Resp</a>	Version 2	10/7/2004 1:58 PM
<a href="#">Open_RR_Call_Resp_ByCraft_brCraft</a>	Version 1	10/7/2004 2:02 PM
<a href="#">PestMgtTroubleshooting</a>	Beta v1.0	2/20/2004 2:22 PM
<a href="#">Planned Estimate At Approval</a>	Version 1	3/8/2005 3:37 PM
<b><a href="#">PlannerDataEntry</a></b>	Version 1	7/28/2005 10:21 AM
<a href="#">Planning List status</a>	Version 1	12/27/2004 2:29 PM
<a href="#">Planning List</a>	Version 2	4/15/2005 2:44 PM
<a href="#">ProjectCostEstimate</a>	Version 1	3/18/2005 3:16 PM
<a href="#">Restroom_TC Aging Summaries by Resp_act</a>	Version 3	6/29/2005 2:39 PM

javascript: runReport('/acweb/newrequest/do\_executereport.jsp?\_\_requesttype=immediate&\_\_executableName=%2Frp%2FWOTRACK%2FPlann Internet

Enter the Work Order Number and select **Yes** from the Print Modified drop down menu and click on **Submit**.

Reporting

**Planner Data Entry Request Page**

Query:

Current Record      Enter a Work Order Number      4028823

Selected Record      Print Modified?      No

All Records            No

     Yes

Send Email:  To Email Report, Click Here

Select From Predefined MAXIMO Email Addresses:      Manually add an Email Address:     

Enter Comments to be Included in the Email:

Schedule Report Run Time:  Right Now      Date (MM/DD/YYYY)      Time (HH:MM AM or PM)

At This Time      At 6:00 PM (HH:MM AM or PM)

Recurring      Every Day      At 6:00 PM (HH:MM AM or PM)

Reporting

Page: 1 of 1 100%

Click on the Print icon in the AWMS toolbar.

LOS ANGELES UNIFIED SCHOOL DISTRICT - JOB ORDER DRAFT  
MAINTENANCE AND OPERATIONS  
Modified Planner Data Entry Form

WO# 4028823

Print

Choose the print icon within the Adobe window to print

Reporting

Print

OK Cancel

Review and obtain supervisors signature on the **Modified Planner Data Entry** report and route the **Modified PDE** report, **02 Change Worksheet**, **Original PDE** and **job ticket** to the CPM for review.

ORG CODE	LOC	BUILDING	PROJECT NO	YEAR	CAUSE	CATEGORY	LEAD DRAFT
2278	12742	9569-27245		08	OTM	148	AA

PLANNED OR WRITTEN BY	DATE PLANNED	APPROVED BY	DATE
Shawn S.	3/27/2009 10:09:30		

SEQUENCE	FUND	AREA	ORG	PROJ	FIXED	REVENUE %
1	REG	AA	CAVENAR			100.00%
2	REG	FA	MAINTENANCE TICKET			

LABOR	REVENUE	FRINGE BENEFIT	TOTAL
\$500.00	\$114.38	\$45.82%	\$660.20

HOURS	CONTRACT	INDIRECT CHARGE	TOTAL
22.00	\$2.00	13.30%	\$239.36

ORIGINAL TOTAL HOURS	REMOVED TOTAL HOURS

ORIGINAL ESTIMATED TOTAL	REMOVED ESTIMATED AMOUNT

**5. Review documents, Print Project Cost Estimate (optional) and Obtain AFSD approval**

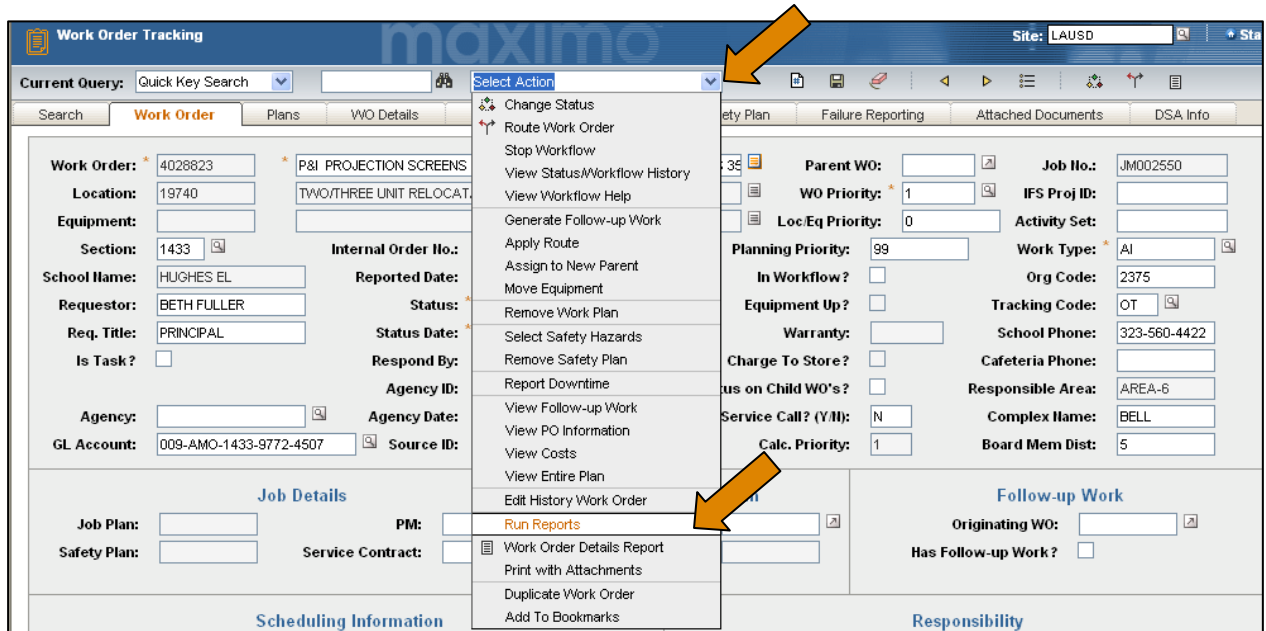
*The CPM or Designee performs these functions.*

Review and compare the **Modified Planner Data Entry** with **Original signed Planner Data Entry** and **Job Ticket**. If cost is correct, sign the **Modified Planner Data Entry**.

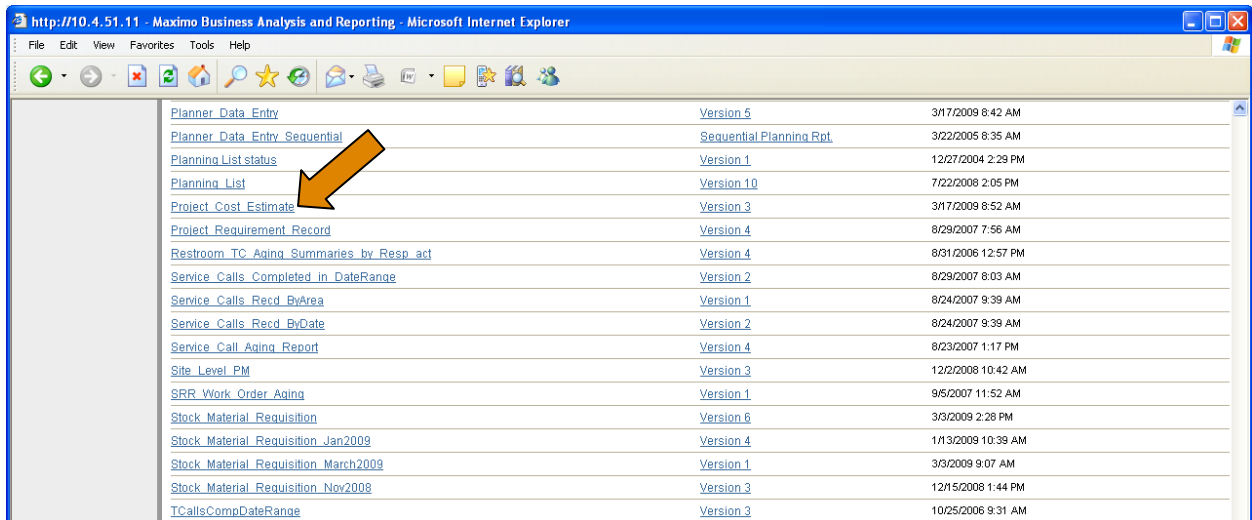
If the project is funded through other than maintenance (OTM), print the **Modified Job Cost Estimate** report and route to Funder for approval.

Follow AWMS log in and work order search steps from **page 1-2**.

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



**Run the Project Cost Estimate Report**




Select **Yes** to print the Modified report, enter the **Work Order Number**, the **Requestors Personal Information** (ie. Principal, LDFD) and **Justification** in the **Work Description** field and click **Submit**.


**Reporting**

### Project Cost Estimate Request Page

Query:

Current Record  
 Selected Record  
 All Records

**Print Modified?** Yes   
**Workorder #** 4028823  
**Requestor Name** Mrs. Love  
**Requestor Title** Principal  
**Requestor Phone** 213-555-5555  
**Requestor Fax** 213-555-5551

**Submit** 


**Work Description tailored for school administrators:** Unforeseen condition found at job site requiring an additional \$500 to complete.

**Items to be provided by school:**

**Cost saving alternatives:**

**Impact on school operations:**

**Reporting** Reporting Home

Page: 1 of 2 100% 

http://.../1.11 - Print - ProjectCostEstimate\_act - Microsoft Internet Explorer

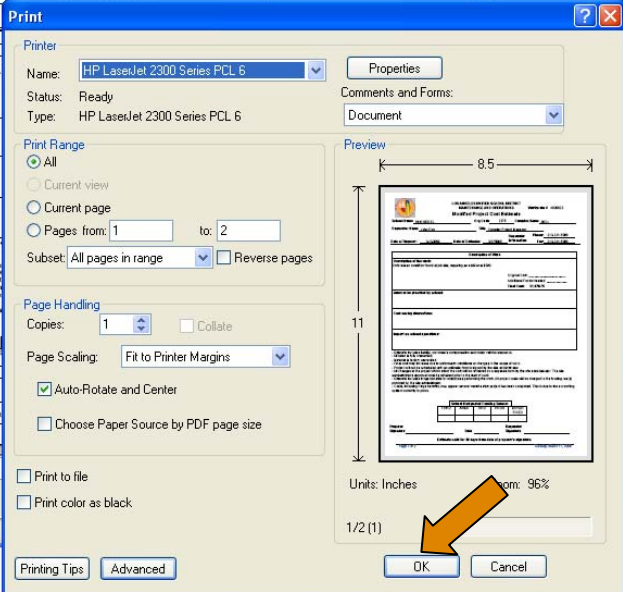
**School Name** HUGHES EL **Requestor Name** John Doe **Date of Request:** 3/13/2008

**Description of the work:** Unforeseen condition found at job site

**Items to be provided by school:**

**Cost saving alternatives:**

**Impact on school operations:**

**Print** 

Printer: HP LaserJet 2300 Series PCL 6

Name: HP LaserJet 2300 Series PCL 6

Status: Ready

Type: HP LaserJet 2300 Series PCL 6

Print Range:  All

Current view  
 Current page  
 Pages from: 1 to: 2  
 Subset: All pages in range  Reverse pages

Page Handling: Copies: 1  Collate

Page Scaling: Fit to Printer Margins

Auto-Rotate and Center


Choose Paper Source by PDF page size

Print to file

Print color as black

Preview: 8.5 x 11 inches, 96% zoom

Units: Inches from: 96%

1/2 (1) 

OK Cancel

- Estimate includes liability, work  
 - All labor is fully warrantied  
 - Material is factory warrantied  
 - Final cost may increase due to unforeseen conditions or changes in the scope of work.  
 - Project will not be scheduled until an estimate form is signed by the site administrator  
 - All changes to the project which affect the cost will be reviewed on a separate form by the site administrator. The site administrator's approval must be obtained prior to the start of work.



**5. Approve and route documents to Clerical for processing**

*The AFSD or Designee performs these functions.*

Review all submitted documents and sign the **Modified Planner Data Entry, 02 Change Worksheet** and submit **all** documents to **Clerical** for processing.

*The Clerical Department or Designee performs these functions.*

Make the adjustments in IFS, print out new Job Ticket, and submit Pink Copy to Job Cost Accounting.

Scan the signed **Modified Planner Data Entry** report and attach to Work Order. Instructions are found in **page 5-6**.

Route all documents back to the CPM for craft distribution and filing.