Post Date: 06/10/2025



Los Angeles Unified School District Maximo 7.6 / Work Order M&O Planned Job (Type 99) Guide





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DEFINITION

The M&O Planned Job (Type 99) guide is designed for projects executed by M&O. The guide details step by step instructions on how to track and process this type of Planned Job in the Work Order Tracking application.

1. WORK IDENTIFICATION

REQUEST FOR WORK

Work is identifiable by a number of different parties. For example, Principals, Plant Managers or Designees may be the first to identify a need at the school and submit a Request for Work form to the CPM. The CPM consults with the Lead Craft involved to determine if the work will require a Planned Job.

SERVICE CALL WORK ESTIMATED OVER 100 HOURS

One may originally identify work as a Service Call and, after investigation, be found to require more than 100 hours of labor. If work has begun on the Service Call, labor is charged against it, the Status is changed to Complete (COMP), and the Completed Service Call is referred to the CPM to initiate a Planned Job. If no work has begun on the Service Call, the Status is changed to Cancelled (CAN), with a note in the Memo field of the Status Change dialog box indicating the Service Call has been changed to a Planned Job. The Service Call is then referred to the CPM to initiate the Planned Job.

2. CONSULTATION WITH AREA MAINTENANCE PLANNER

The CPM or Designee performs this function.

Inform the Area Maintenance Planner that a Planned Job is being initiated and provide the scope of work. Area Maintenance Planner will analyze the propose Planned Job and identify if a 'lifecycle' Work Order exist for the project. If a 'lifecycle' Work Order exists, the Area Maintenance Planner will create a Parent Work Order and attach the 'lifecycle' Work Order as a Child. The Area Maintenance Planner will then provide the CPM or Designee the Parent Work Order that will be used for planning.

If the Area Maintenance Planner discovers that the proposed Planned Job does not have an existing 'lifecycle' Work Order, the CPM or Designee will create a new Work Order.

3. LOGIN

The CPM or Designee performs this function.

To login to Maximo 7.6, please go to <u>http://awms.lausd.net/maximo</u>. Enter your **Single sign-on** username and password and click on the **Sign In** button.

I	<mark>ivoli.</mark> software	IBM.
	Maximo 7.6 Max	kApp02
	ROP FOR THE WORK	User Name: jennifer.leff Password:





START CENTER

When you first login, you will be taken to the Maximo Start Center.

A				Balatin	s:(0) Beports Profile Sign Out Be	• IBM.
					9	Update Start Center
Favorite Applications Ø	Bulletin Board 🛛 🎔 Filter 🗧 🔍					
Work Order Tracking	To filler for specific records, specify data in the filter	leids and then press the Enter key.				
Labor Reporting	Subject	Message	Post Date	Expiration Date	Viewed	
View Requisition			There are carrently no bulletin board message	to view.	N	
Purchase Requisitions						
Request for Quotations						
Purchase Orders						
Receiving						
Preventive Maintenance						
Assets						
Job Plans						
Involces						
Work Requests						
Companies						
Purchase Contracts						
Issues and Transfers						
Mobile Start Center						

WORK ORDER TRACKING

Under the Favorite Applications section, click on the **Work Order Tracking** application.

↑ Melcome, Leff, Jennif	er on MaxApp	002
Favorite Applications 🖉 🖻 🗙	Bulletin Board	💙 Filter 🔌 🔍
Labor	O To filter for spe	cific records, spec
Work Order Tracking	Subject	Messag
Labor Reporting		
View Requisition		

If the application is not saved in your **Favorite Applications**, you can access the application by clicking on the hamburger menu, selecting **Work Orders**, then selecting **Work Order Tracking**.







WORK ORDER TRACKING HOME

You will then be taken to the Work Order Tracking home screen; in this screen, you may search for any existing work orders through any of the displayed fields.

☆ Ξ	Work Order Tra	cking 🛛				IBM.
My Open Service	Call Find Work Order	Q V Select Action		🕰 🛃 🗾] 💕
🔍 🔍 Advanced	Search 💌 🔚 Save Que	ry 🗄 🕶 📕 Bookmarks				
Work Orders	Filter 🔉 🔍 🛛 🌽	😂 💮 🦊 🗇 1 - 20 of 314 🌳				
Work Order	CC Description	Description	Status	Cost Center	M&O Area	Person Gro
					Q	
37820217	BERTRAND EL	can not access WFMM at site	WAPPR	0001243801	AREA-N1	T-PC
36765045	SCHOOL SVS-M&O C3(CS	Access to Food Services and Special Services Employee and to Update Driver's License and Insurance	WAPPR	0001049301	AREA-C3	T-PC
38282652	SCH SERV - M&O C3	New Employee Needs Workforce Manager Mobile Device - Gerardo Hernandez	WAPPR	0001048101	AREA-C3	T-PC
37951543	SCHOOL SERV-M&O PUS	New Employee in a Temporary assignment needs a WFM device assigned to him	APPR	0001048301	AREA-S1	T-PC

4. NEW WORK ORDER

To initiate a new work order, click on the ¹¹/₁₀ icon, located on the top toolbar.



A Work Order number will automatically populate along with the **Reported Date** and **Status**. Write the work order number on your planned job package. The status will begin as **Waiting on Approval (WAPPR).** Fields with an asterisk* must be populated before the record can be saved.

A E Work Order Tracking			
My Open Service Call * Find tholk Order Q, * Seech Action	💌 🔁 🔂 🥒 🌵 🌳 💱 💷	• 🗟 🗾 💷 🥥 🛄 🗉 🖉 📽 💌	
Last Vice Work Onler Plans WD Details Assignments Falure Reporting	Related Records Actuals Safety Plan Lo	og Deficiencies Specifications Service Address Map	
Case Indexcepts		Paset IID. 3b	édastanania 🎅
+ Work Onder: 340396375	59	+ Mark Type:	Reported Date: (95/26 1:5) PM
e Cost Center		+ WO Priority: 3	Rampord By: HD/SQ4 1.53 PM
+Louden >>	0 4	Service Cell?	Status Visional
Location Path		CPM Group	Status Date: (95/04.1.5) PM

Populate the following fields:

General Work Ord	er Information	Scheduling Information	Responsibility
Work Description	Requestor Name	Target / Planning Start	Category Code
Cost Center	Requestor Title	Target / Planning Finish	Routing Code
Location	Work Type	Scheduled Const. Start	
Job Type	WO Priority	Scheduled Const. Finish	
Program	Tracking Code	Close Out Start	
		Close Out Finish	

Field Breakdown

Work Description Type a brief description of the job in the Description field.





Cost CenterThe Cost Center is a 10 digit value, used to determine what
Area/Organization budget is responsible for the service. For additional
information, please see Attachment A.

To determine what the cost center number is, click on the sight of the **Cost Center** field.

H Work Order Tracking	
My Open Service Call Find Work Order Select Action	· · · · · · · · · · · · · · · · · · ·
List View Work Order Plans WO Details Assignments Failure Reporting	Related Records
Class: WORKORDEF	
* Work Order: 38286375	1
* Cost Center:	
Location:	

A **Select Value** window appears, you may search for the Cost Center value by entering the school's org code and/or name in the Description field. Click enter when done.

elect Value								
V Fiter	e> Q (🧟)	🕘 🐥 į 🗇 1 - 20 of 33	a 🧇			c& Download (==		
Org Code	Cost Center	Description	Select Value					
8650 🧹								
1240	0001124001	ESC-REG EIF-SAAS	✓ Filter	> Q 2	🕐 🌵 🔅 1 - 20 of 3343 🌳			C& Download
1242	0001124201	SPEC PROJ DROPOUT PR	Org Code	Cost Center	Description	Addr_1	City	Zo
1243	0001124301	DIAG LRNG CTR-AREAS			Fremont			
1244	0001134401	VICC TRO CTR HDC CR /	1240	0001124001	ESC-REG EIF-SAAS	T80		
1244	0001124401	YOU TRO CTR-RDC-ORCH	1242	0001124201	SPEC PROJ DROPOUT PREVENTION	355 S GRAND AVE RM 144	LOS ANGE	LES, CA 90071

Select the appropriate Cost Center by clicking on the Cost Center value.

् । 🏒 । 🕥	0 1 - 1 of 1		C& Do	wnload
Cost Center	Description	Addr 1	City	Zie
	Í.			
0001865001	FREMONT SH	7676 S SAN PEDRO ST	LOS ANGELES, CA	90003
	Cost Center 0001865001	Cost Center Description Cool1865001 FREMONT SH	Cost Center Description Addr 1 0001865001 FREMONT SH 7676 S SAN PEDRO ST	Cost Center Description Addr 1 City City Cost Center Description Addr 1 City City Cost Center Present Cost Center Description Addr 1 City City Cost Center Cost Center Cost Center Cost Center Cost Center Cost Center Cent

Once you click on the Cost Center value, the value will appear on your Cost Center field.





☆ Ξ Work C	Order Ti	racking	J	_		
My Open Service Call 🔻 Find	Work Orde	r	Q	▼ Sele	ct Action	• 🗎 🖬
List View Work Order	Plans	WO Det	ails	Assignments	Failure Reporting	Related Records
Class:	WORKOF	RDEF				
* Work Order:	38286375	5	*			(a)
Cost Center:	00018650	001	FREM	ONT SH		
+ Location:	S-13475	>>	FREM	ONT SH		(]
Location Path:	FREMON	IT SH :				

After selecting the appropriate Cost Center, the system should auto populate a location value in the Location field. The value will have a prefix of "**S**-XXXXX" which represents the "supersite" level of the Cost Center. If the location does not populate, there may be multiple supersite locations assigned to the cost center. Please follow the instructions below to select the location. Contact the Maximo team if the there are no locations available

New Location Hierarchy

Level 1: **Supersite (S**-XXXXX) – The "Supersite" represents the District property line the cost center inhabits. District property lines are defined by the LA County Assessor's office. The name of the supersite is typically the same name as the dominant/largest school (cost center) within the property line.

There are locations (cost centers) that share the same property line. As a result, the name of the supersite containing all of the cost centers on the property line is the same.

Level 2: Building (B-XXXXX) Level 3: Floor (F-XXXXX) Level 4: Room (R-XXXXX)

*Note: There are no longer "Site" level locations in Maximo 7.6. The "Site" level equivalent is now the called the "Supersite." For additional information, please see Attachment A.

If you want to drill down further from the "supersite", click on the *icon* icon to the right of the **Location** field and click **Select Value** from the list.





↑	Order Trackin	g			
My Open Service Call 💌 Find	Work Order	🔍 👻 Sele	ect Action	* 🗟 🕅	. / (4
List View Work Order	Plans WO D	etails Assignment	Failure Reporting	Related Records	Actuals
Class:	WORKORDEF				
Work Order:	38286375	•		1	
Cost Center:	0001865001	FREMONT SH			
Location:	>>			ta 🔝	
Location Path:		Select Value			
Asset	°	Open Drilldown		1	Prio
Job Type:	4	Classification		<u></u>	
CPM:	806526	Attributes	uel	1	c
Section		View Contracts			
GL Account		View Work Details			
Requestor:					

A **Select Value** window appears with a list of locations that are under the cost center you selected earlier. Select the appropriate location by clicking on the location value (e.g. S-13475).

The "supersite" level location is listed on the top and subsequent building and room/floor locations are listed below.

elec	t Value				
~	Filter >	🔍 🖉 💮 🏶 🗇 1 - 20 of 849 🌳 👘			Ci∳ D
Loca	ation	Description	Type	Path	
<u>S-13</u>	3475	FREMONT SH	SUPERSITE	FREMONT SH :	
в	2	SERVICE YARD	BUILDING	SERVICE YARD : FREMONT SH :	
B-	3	COMMUNITY SWIMMING POOL, CITY OF L. A.	BUILDING	COMMUNITY SWIMMING POOL, CITY OF L. A. : FREMONT SH :	
в.	9	STUDENT UNION BLDG	BUILDING	STUDENT UNION BLDG : FREMONT SH :	

After selecting the location value, the value will appear on your Work Order.

★	
My Open Service Call 💌 Find Work Order 🔍 💌 Select Action	
List View Work Order Plans WO Details Assignments Failure Reporting	Related Records
Class: WORKORDEF	
Work Order: 38286375	ta 1
Cost Center: 0001865001	
Location: S-13475	1





Job Type Select Job Type 99 (Planned Job)

ect Value			
✓ Filter ⇒ (🍳 🦧 💮 🐥 🗢 1 - 1 of 1 🔿	Download	
ob Cat Code	Description	Mocat	
99			
9	Planned Job	PROJ	

Requestor Type the name of the Director, CPM or other Designee requesting the job.

Requestor Title Type the title of the Requestor in the Req. Title field.

Work Type Choose the **Work Type** that best describes the job. You may type your selection directly into the field if you know the Work Type Codes.



If you do not know the Work Type Codes, click on the field button ext to the Work Type field and the selection window opens.

elect Valu	8	
✓ Filter	> 🔍 🖉 💮 🦊 🗇 1 - 14 of 14 🗇 👘	CI Download 🗧
<u>Type</u>	Description	Organization
AD	Administrative Work	LAUSDORG
AI	Alterations and Improvements	LAUSDORG
СМ	Corrective / Routine Work	LAUSDORG
DFR	DEFERRED WORK	LAUSDORG
DSGN	Design Work	LAUSDORG

Tracking Code Select the most appropriate tracking code in by clicking on the work order is an assist ticket, please select AT.

Tracking Code:					
Select Value					
💙 Filter > 🔍 🦪 🎓 🏶 🗇 1-20	of 25 🍁	C& Download 🛛 📼			
Value	Description				
[
AD	Administration				
AT	Assist Ticket				





Category Code The Category Code designates the general craft or category of work to be done on the job, such as plumbing or carpentry. You may type your selection directly into the Category Code field if you know the Work Categories.

Responsibility	
* Site Based (Y/N): N	
Potential Warranty?	
Category Code:	

If you do not know the Work Categories, click on the arrow ^{Solution} icon next to the **Category Code** field to view the menu.

💙 Filter 🔿 🍳	🖣 🏑 🔆 🕀 📴 1 - 1 of 1 🗇 🛛 🛤 Download 🕴 🗖
<u>Category</u>	Category Code
	planned
BUNGCREW	Bungalow Crew Planned Jobs

Routing Code The Routing Codes are sub-menus of the Category Codes. After selecting the Category Code, the system filters the selection of Routing Codes to show you only those appropriate for the Category you have chosen.

💙 Filter 🔿 🤇	💫 🛛 🖉 🕀 🗣 🖾 🗘 1 - 3 of 3 🌍 🔀 Download 🕴 🗮
Category	Routing Code
BUNGALOW	Bungalow Crew Planned Work (Use MO-BM-PL)
MO-BM-PL	Bungalow Crew Planned Work
TEST_BUNG	sdfasdfsda

You may type your selection directly into the Routing Code field if you know the

Routing Codes. If you do not know the Routing Codes, click on the spyglass icon next to the **Routing Code** field. The Routing Code Lookup window opens. Select the Routing Code that ends in **-PL** (Planned Work).





Start/Finish Dates Enter a rough estimate date (e.g. 7/1/13) or click on the calendar icon to each field of when the phases of work are expected to begin / finish.

Start	8	Finish	8
Target / Planning Start:	B	Target / Planning Finish:	B
Scheduled Const. Start:	E	Scheduled Const. Finish:	E 0
Const. Actual Start:	1	Const. Actual Finish:	8
Close Out Start:	10	Close Out Finish:	B
Start No Earlier Than:	B	Finish No Later Than:	1

Fie	elds	Definition
Target / Planning Start	Target / Planning Finish	Start and end of Planning
Scheduled Const. Start	Scheduled Const. Finish	Scheduled start and end of construction
Const. Actual Start	Const. Actual Finish	Actual dates for the start and end of construction
Close Out Start	Close Out Finish	Start and end of close out

Actuals for Planning and Closeout will be determined based on the work order status. The status will be associated to the starts and finishes of the different phases of a project.

Following the chronological order, any dates associated to any status greater than the current status would be interrupted as Forecasted dates. Any dates associated to a status that is equal or less than the current status would be interrupted as actual dates.

Example: If status = FUNDED, it would be interrupted as the Planning start and finish were actual dates and the Closeout dates were forecasted.

	STATUS	
PRE-PLANNING	WAPPR	START
	WPLAN	¥ FINISH
	INPLAN	START
PLANNING	WREVIEW	
	REVIEW	
	PFUND	FINISH
	INTREADY	START
EUNDING	INTSESSION	
	INTCOMP	
	FUNDED	FINISH
DRE-CONSTRUCTION	SCH	
PRE-CONSTRUCTION	WMATL	
CONSTRUCTION	INPRG	START
contraction	FCOMP	FINISH
	FCOMP	START
	WINSP	
CLOSEOUT	PCOMP	
	REWORK	
	COMP	FINISH







Sample screen shot of work order entry:

A Ξ Work Order Tracking						
Ny Open Service Cal 🔍 Find Work Order 🔍 🔍 🕏 Seech Action 🔍 🐨 🚼 🥖 🦛 🏟 🎲 💷 🔞 🐼 🖉 💷 ⊘ 🔀 🗄 😴 🕶						
List View Work Order Plans WO Details Assignments Failure Reporting	Related Records Actuals Safety Plan Log Deficiencies Specifications Servi	ice Address Map				
Class WORKCROEF + Work Order 3228375 + + Cost Centre 000 655001 + Location Esh FREMORT SH Location Esh FREMORT SH Location Path FREMORT SH Location Path FREMORT SH Location Path Regeneric State St	Parent WO: + Viok Type: AD + Of Microp - CPM (arcop - CPM	Allachmanta Reported Date: Status Responder Date: Status WaPPR Status Status WaPPR Status St				
Scheduling Information	e	Responsibility				
Start Target / Planning Start Const Actual Start Const Actual Start Cose Out Start Cose	Finish Image: Const Finish. Scheduled Const Finish. Image: Const Actual Finish. Const Actual Finish. Image: Const Finish. Close Out Finish. Image: Const Finish. Finish No Later Than: Image: Const Finish. Predocessors: >> Include Tasks in Schedule?	Site Based (YM) N Potental Warranty/ Category Code BUNGCREW Routing Code BUNGCREW Super / OT Contact Lad Geoger >> Barba, Lespoldo Person Grupp BUNGALOW >> Les Conta Bin >> Building Mover				

Verify that all the information is complete. To save the record, click on the $\overline{\mathbb{I}}$ icon, located on the top toolbar.

☆ =	Work (Order T	racking							Eulictics: (0)	Beports	
My Open Service	e Call 👻 Find	Work Orde		a.	Select	Action			-	1 2	(A)	8 2
List View	Work Order	Plans	WO Details	Assig	nments	Failure Reporting	Related R	ecords	Actuals	Safety Plan	Log	Deficien
	Class + Work Order	WORKOF	RDEF	Replace	hot & co	id water lines in Main	Building	1		Parent WO Work Type	AD	×

A "Record has been saved" message will appear.

£.	≡ wa	ork Order	Tracking						VA42051 - Record ha	is been sav	ed.
	* Fr	d	🔍 💌 Select Acti	on	- 1	8.2 4	þ	💱 🕲 🖪	-		088
List	Work Order	Plans WO	Detaila Assignmenta	Related Records	Actuals	Safety Plan	Log	Failure Reporting	Specifications		
	Cla	ss: WORKORD	ER						Parent WO:		*
	Work Ord	ler: 3828637	S Replace hot & c	old water lines in Main	Building	해			* Work Type:	CM	9

5. DEFINE SCOPE OF WORK AND ATTACH DOCUMENTS (OPTIONAL)

The CPM or Designee performs this function.

Scope of Work Click on the button to the right of the Description field . A Long Description window appears.





	E Work Order Tracking						BMXAA42651 - Record has been saved.				
		Find	0	Select Act	en	• 📵		Þ 🖗	💱 🎕 🖪		3 🗉 😂 🤤
List	Work Order	Plans	WO Details	Assignments	Related Records	Actuals	Safety Plan	Log	Failure Reporting	Specifications	
		Class: WC	RKORDER							Parent WO:	*
	Wor	k Order: 38	286375	* Replace hot & c	old water lines in Main	Building	5 -		1	* Work Type: CM	a

Type the Job Scope, complete with the Contact Person and other relevant information required for planning. The Lead Labor Group Planner will write the Craft Summary when the job has been approved for planning. Click **OK** on the bottom right of the screen to return to the Work Order.

Long Description	
replace hot and cold water lines in the main building	
🞸 ✨ ở 🗈 B I U ∄ Ε 🚈 Ӕ ≕ ≔ ≕ ≡ 🖋 ▾ 🖪 ▾ 🗛 ▾ 🐘 ▾ 🦻 📦	abo
Font Size xx-small Format None F	
Remove and replace hot and cold water lines in Main Building. Contact person for this project is Phillis Wheatley, Complex Project Please see detail scope below: GA - Turn off water supply AA - Remove wall GA - Remove and replace hot and cold water lines AA - Patch Wall CA - Paint Wall	Manager.
Reset	Clear
ОК	Cancel

Attach Documents, Photos, Drawings (Optional)

You may attach documents to your work order by clicking on the Attachment icon.

A E Work Order Tracking		
n dae bese bel ¹ forme dae 🛛 🔍 🔹 bestate 🚽 🐄 🔛 🧝 🖓 💭 👄 🖏 🖾 📾	00004-	
Carther Teacher Para 200 Delas Insugerante Falles Reporting Research Adults Lobo Para Log Determined	Sandhuman Santa Lanna Ma	
Dave jedenchezel	Feed till 30	Adapted by

After clicking on the icon, you have an option to View Attachments, Add New Attachments or Add from Library. To add a new file, hover your mouse over the Add New Attachment value and select Add New File.

Specification	s Service Address	1	Map		
	Attachments				
×	Deported Date:	0	View A	Attachments	
	Add New File	9	Add N	ew Attachment	5 F 🗸
r 🐻 /	Add New Web Page	•	Add fr	om Library	
	Status:	WAP	PR		_

A **Create a File Attachment** window will appear. Follow the on screen instructions to attach a document.





Create a File Attachment
Only files with the following formats can be enabled for printing: .pdf, .xls, .csv, .txt, .doc, .gif, .jpg, .ppt. Clear the check box beside the Print attached document with report if printable type option (Advanced Option) if the file being attached is not in one of these formats. * Select a Folder: Attachments Specify a file
Name the document:
Advanced Options
Copy document to the default location set by your administrator (recommended)? 🗹
Add document to the document library for others to use?
Print attached document with report if printable type? 🗹
OK Cancel

6. PRE-PLAN TASKS/LABOR

The CPM or Designee performs this function.

Click on the Plans tab.

★	
My Open Service Call 💌 Find Work Order 🔍 👻 Select Action	
List View Work Order Plans priments Failure Reporting Service Address Map	Related F
Work Order: 38286375 e replace hot and cold water lines in the main building Proj Cost Desc:	Pa

Pre-Plan Tasks

Make sure that the category, route code, and person group are populated. The creation of the task will copy the contents of the work order. If the fields are empty, it will copy the empty values to the task.

On the Plans tab, click on the New Row button under the Tasks for Work Order XXXX section.

1 E Work Order Tracking				person of party party party party IBM.
Ng Open Revise Call 🔻 Presi Vash Grain 🔍 🖝 Relead Astron	기 🔁 🖂 🥒 🔶 🔯 🗮 🕷	2 = 0 1 1 1 4 ·		
Television Venitorie Para 100 Deck Associate Falses in	come Ander Bourn Advant State Rev I are	Information Specifications Service Address Mag		
Visit Order Streams + legitics full set with their is the Register Sec.	an samp () Si	Paul N2 0, Main junes	Dadhar Anh Tara	Planty Pody An Reflec
Children of Mark Color (ROMETS) p rane -	14 O			the formation of the second se
WOLM Deablast	Louise	Loader Description	2mm	Inter Date
		There are no much to display		Telestrade Beatsades Beatrations Beater
Tanka for Mail Only 202007				in factor (.
L mm	Call Income	inter	and from	Initia Inte
		There are no more to steplie.		Bully .

The system automatically generates a **Task ID** for each task in increments of ten. Using your best judgment on what craft will be utilize on the project. Use the following naming convention: **PP-XX** (XX = Craft Code).

For example, **PP- AA** for Carpentry.

Enter the total number of hours estimated for the task in the **Duration** field.





Note: The duration is the length of time the employee(s) in this craft would occupy on a schedule.

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	-		22.45	0					as income	5	8
+ Tell	10 PF-10.	- 55		+ Card Center (accounting)	Statut JALPER		GK Account	-Q.			-
ander a roles	IP PREMONT IN	G		Calmana Duration as	Bertho Strange - p		+ Sectory	- 0			
Aread		10		Campay Came (MARCERY 10)	Route Code: Auto-data Ph. 10.		in the st				
	theparter.			Measurement Sale			Constants				
	Vessurement Point			Machurenter Vela		1040	Etable Changes?				
											[Bern]

Click on the **New Row** button to repeat steps for the next task. Click on the icon to save when finish.

Sample screen shot:

Tas	ks for Work Order 3	8286375 📄 🕨 Filt	er > Q ⊉	👚 🐣 j 🧇 1 - 2 of 2 🖒				
	<u>Task #</u>	Mat Cat	Craft	Summary		Section	Job Type	Est Dur
	10			PP-AA	t		99	60:00
-	20			PP-AA	貫		99	2:00

Pre-Plan Labor

If the job type is not 99 when the planning is created, the labor records will not be burdened. The charges to the IO will be burden. The plan amount will be short.

Each Task Line created above shall have a corresponding Labor line entry. Click on the **New Row** button under the **Labor** tab.

Labor Materials Services Taols						
Labor Film > C. 2 -> -> -> ara ->					th Deventered 🕴 🚥	
Task Craft Craft Description	Labor Calegory	Quantity	Liouts	Bate	Line Cest	
	There are no rows to display.					
				Select Crew Type	Select Craft New Row	

Task ID: Enter the Task you are estimating the labor for (e.g. Task ID 10).

Craft Code: Enter the two-letter craft code of the craft that will be performing the task

Quantity: The system defaults the value to 1, but it can be changed to any number of employees you estimate will be needed on the task.

Labor Cat: The system defaults LR (Labor Regular), but can be changed to LO (Labor Overtime) if applicable.

Hours: Hours for **each** employee working on the task. The system automatically populates the hours based on the corresponding Task (duration field).





Labor 🕴 🕨 Filte	· > 21213	↓ ○1-1 of 1 ○			
	Task	Craft	Craft Description	Labor Category	
v	10 🔍	AA >>>	Carpenter	LR 🔍	
Task:	10 🔍			Crew:	»
Crew Work Group:	»			+ Hours:	30:00
Crew Type:	»			Quantity:	2
Craft:	AA A			Burdened Rate:	75.77
Labor Category:	LR O				

Click on the **New Row** button to repeat steps for the next task.

Sample screen shot:

ſ	Labor Materials Services Tools												
	Labor : 🕨 Filter > 🔍 : : 🏠 : 🗇 1 - 2 of 2 🖒												
		Task	<u>Craft</u>		Craft Description Labor Category		Ι.	Quantity	Hours	Rate			
		9	AA	>>	Carpenter	LR	Q	2	30:00	75.77			

Click on the 🗐 icon to save when finish.

Work Order Tracking	<u>B</u> ulletins: (
My Open Service Call 🔻 Find Work Order 🔍 💌 Select Action	
List View Work Order Plans WO Details Assignments Failure Reporting	Related Records Actuals Safety PI
Work Order: 38286715 Replace hot & cold water lines in Main Building Proj Cost Desc:	Parent WO:

7. PRINT/SUBMIT WORK ORDER DETAILS REPORT FOR PLANNING APPROVAL

The CPM or Designee performs this function.

On the work order, click on the **Select Action** dropdown 🔽 icon and select **Run Reports**.





			and the second second second	11
Open Service Call = Pin	el Vibek Onter	Q . 3	elect Action	
		1	Change Statue	
List Manay Tours Online	Pars 190.0et	am Assert	Apply SLAs	100
	a annotation	and a second second	View SLAs	
e Vliuk Geder 38256715	· Replace No	f is cold water in:	Select/Deserved BLAs	***
tra Cost Dast		-	Change Work Order Options	
			Coula	× .
Chikken of Work Order 3	8299755 D Taber		Ver	*
VIDEA IN	Description	-	Create Jub Plan from Work Plan	
- ALLER	active data		Parsure Work Plan	
			Select Selety Records	1
			Remote Salah Plan	
			Apply Hauter	
Tasks for Work Order 362	96755 👂 Hiller		Enter Myter Neudreps	
Tasi	A Mat Cat	Cot	Report Downtime	34
			Manage Doverbeik Hakay	
			Assign to New Parent	
		-	MuseSnapModly	
and Materials for	Tours		Eath Holtony Work Online	
			Reschedute/Unsstign Tostgurweits	
Labor P Filter		1.2472	Basket Owner	
	Test Could		Take Ownership	111
b	AA _5	20	Copy Daubates to Work order	
	1000	100	Adapteried Likeary/Folders	-
	0.0		Duplicate Work Order	
1.000	194		Just to Sookynamie	
Sew Week Group	136)		Ethe Impecter Results	
Creve Type	39		Run Reports	1
Cost	30		Copron-Javelylics	
Labor Colorenza Luca			Apply the dynamic saturation	

A **Reports** window will appear. Click on the next arrow \Rightarrow until you find the Work Order Details Report. Click on **Work Order Details**.

On Demand Reports	Scheduling Status
Reports to Run	🗸 Filter 🔸 🔍 🛛 🖉 🚱 🖗 🖗 6 - 10 of 13 🏟 🖉
Description	
Project_Cost_Estimat	te
Stock_Material_Requisiti	ion
Work Order Details 🧹	
Work Order Details - Par	rameterized
Work Order Hierarchy	

A **Request** Page will appear. Click on the **Submit** button.





lelp Text		
Parameters		٥
Schedule		-
 Immediate 		
At this Time	1	
Recurring		
Email		=
To:		
Subject:		
Comments:		
File Type:	Report Delivery Format:	
PDF	 Email with a file attachmen 	t
◯ XLS	 Email with a file URL 	

A new **BIRT Report Viewer** window will appear. Review the report for accuracy and print the report by clicking on the printer \blacksquare icon. The report will be exported into a PDF file where you can begin the print.

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Page 1	W 1 191	**** II ::				
() Let Aupli	n Einflind School Dir	Ariu#				
- 15 m	wo	RK ORDER DE	TAILS R	EPORT		
W.O. # *36 36765045 3eb #:	763045*	Access and to	to Food Se Update Dri	rvices and Spe ver's License a	cial Services Employee nd Insurance	
Nork Order Details						
Requestor Name: Day	na Barimen	Surgester Title:	Otef Cerk	Reported Gate:	\$35/28	
teepond by Date: 6/3	0/23	Status:	754798	W.O. Prisetty:	3	
Nork Type: CH	(C.a).	Parent W.O. #		Annual Date:		
dench to:		Select a second		behave's come		
Constants Start Wile IN 673061 Horse & Driver Consten Location Details	Provagal Clark for Spe end Insurance Differen	nial Services and Pool Se Mart Screen.	P	econo la Indii Cont	Cartains'Locations dies not have	
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011	Servin, Hanuel	CPHI PRomet	213-74	5-1586		
Org Code (5.2):	D493	Cafeterte Ph	one:		3	

Submit the report to the AFSD or designee for review and approval.

8. AFSD/MANAGER TO REVIEW PLAN JOB AND APPROVE FOR PLANNING

The AFSD or Manager performs this function.

Review the **Work Order Details** report, if approved, proceed to the next step, otherwise re-route the report back to the CPM/Requestor to rework/clarify scope.

9. VERIFY TARGET DATES, CHANGE THE STATUS TO WAITING ON PLANNING (WPLAN) AND PLACE THE JOB ON THE PLANNING LIST

The AFSD or Manager performs this function.





Verify **Start/Finish dates** in the Scheduling Information section of the work order.

cheduling Information										
Start	=	Finish	-							
Target / Planning Start: 10/5/17 12:00 A	M 🗒	Target / Planning Finish: 11/4/17 12:00 AM								
Scheduled Const. Start: 11/5/17 12:00 A	M 🗒	Scheduled Const. Finish: 12/5/17 12:00 AM	- 👪 🛛							
Const. Actual Start:		Const. Actual Finish:								
Close Out Start: 12/6/17 12:00 A	M 🕮	Close Out Finish: 12/12/17 12:00 AM								
Start No Earlier Than:	1	Finish No Later Than:	10							

Change the status to Waiting on Planning (WPLAN)

Click on the Change Status 😵 icon in the top toolbar.

	-					_ 🔁 🖥	1.	-		
Open Service	Call Find	Work Orde	r C	Select	Action	0				
List View	Work Order	Plans	WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan	Log	Deficien

A Change Status window will appear. Select Waiting on Planning (WPLAN) from the New Status dropdown menu and click on the OK button.

Change Status						
Work Order:	38287840	Replace hot & cold water lines in Main	Building	t 1		
Status:	WAPPR	Waiting on approval				
		New Status:	Waiting on Planning	(WPLAN)		
		Status Date:	9/6/24 8:01 AM			
		Reason:				
		Reference WO#:	~			
		Memo:				
Print or Email World	k Order Report w	hen change status in background selected?				
		Change work order status in back ground?				
	Notific	ation E-mail for Work Order Change Status:	jennifer.leff@lausd.ne	et		
					ок	

Place the Job on the Planning List

To place the job on the planning list, insert a planning priority number in the **Planning Priority** field.

Planning Priority:	10
· · · · · · · · · · · · · · · · · · ·	





To save the record, click on the 🛅 icon, located on the top toolbar.

A =	Work C	Order Tr	racking	-						Quilietins: (0)	Esports	Profile
My Open Servic	e Call + Find	Work Order	-	۹.	Select	Action	*		+	2	a	3 🗹
ListView	Work Order	Plans	WO Details	Assign	ments	Failure Reporting	Related P	lecords	Actuals	Safety Plan	Log	Deficien
	Class • Work Order	WORKOF 38287840	RDEF	Replace ho	t & cold	vater lines in Main Bui	ding	- 1 12	¢.	Parent WO + Work Type	CM	>>

Route/Inform the Lead Craft about the Planned Job and the need for planning.

10. LEAD LABOR GROUP REFINE JOB PLAN AND CHANGE STATUS TO IN PLANNING (INPLAN)

The Lead Craft Planner or Designee performs this function.

On the work order, click on the Plans tab.

★	Bulletins: (0) Reports Profile ;
My Open Service Call 💌 Find Work Order 🔍 💌 Select Action	* 🕑 🔛 🥒 🌞 🛸 🐼 🗹
List View Work Order Plans nments Failure Reporting Service Address Map	Related Records Actuals Safety Plan Log Deficienci
Work Order: 38287840 Replace hot & cold water lines in Main Building Proj Cost Desc:	Parent WO: Q Section: Image: Status: CAN Job Type:

You will notice that there is already Planned Tasks/Labor on the work order. These are Pre-Planned estimates from the CPM/Requestor. Refine the values to the details of the scope.

Tasks	for Work Order 14183	036 🕴 🕨 Filter 🚿	Q121 4 & I	⊖ 1 - 3 of 3 🔿						C& Download
	Sequence ¢	<u>Task#</u> ≎	Mat Cat	Craft	Summary		Section	Job Type	Est Dur Status	
		10		5	PP- AA	t	1431	99	60:00 WAPPR	💝 👘
		20		5	PP- GA	t	1431	99	240:00 WAPPR	💝 👘
▶		30			PP- CA	D	1431	99	40:00 WAPPR	💝 💮
										New Row
Labor	Materials Serv	ces Tools								
Labor	Filter > 🔍 🛔	2 🛧 🗣 <	⊇ 1 - 3 of 3 😳							Die Download
		Task	Craft		Craft Description	Labor Category	Quantity	Hours	Rate	Line Cost
		10 (🔍 AA 🛛 🚿		Carpenter	LR 🔍	2	30:00	56.86	3,411.60 👚
		20	🔍 ga 🛛 🚿		Plumber	LR Q	2	240:00	64.90	31,152.00 💮
		30 (🔍 CA 🛛 🚿		Painter	LR 🔍	1	40:00	54.57	2,182.80 👚
										Select Craft New Row

For example, change the task name from "**PP- AA**" to "**AA- Remove 5x7 wall to expose hot and cold water lines**" and refine the duration estimates.

Tasks	for Work Order 1418303	s 🖡 🖡 Filter 🗆	• Q.J.2}	0. 4 10	1-4014 🔾					
	Sequence *	Tank #	Well Call		Craft	Summery		Sector	Jab Type	Ent.Dat
Þ.		10				AA- Remove Sx7 walls expose het and cold water tree.	10	9431	99	68.00
Þ.		20				GA- Remove and replace hot and cold water lines.	19	1421	99	240:00
Þ.		30				A& Patch wall	19 ┥	1431	99	48:00
Þ.		40				CA. Paint walls match existing color	5 9	1421	99	2:00





New Task

To create additional tasks, click on the New Row button. The system automatically generates a **Task ID** for each task in increments of ten. In the task description field, type in the **two-letter Craft Code**, **dash**, and a brief Task Description.

For example, "GA- Remove and replace hot and cold water lines."

Enter the total number of hours estimated for the task in the **Duration** field. **Note:** The duration is the length of time the employee(s) in this craft would occupy on a schedule.

Separate 1 Januar Perce	Def.	Lensey.				- Seller - unities	Edilar Exten	
		IT AA		NGE .		9434 89	er loaren	V 8
NO. 12 7 79-44	100	Inserve	() () () () () () () () () ()	Status (199777)		Classes 1411	dastrata et	
An S-DATE IN PRESENT ST		5 Themaket Durales		a farating			Accepte Despector	
and (19)		S + Carl Serier	000-887007	Berind (MIDDLT)	(#C)	one Tuper (He	SL Autourt	- G.
breaked blant		Terget Bart (1997) (200 we		Articl Dat	175		Category-Caller (PL/HEINO)	
Intervent from		Target Press, 01111 1210-40	175	American	13		Road Carlow Mill Con-Mil	
manufar	39		Management Date:	13		Diservation		
Measurement Point	0		Hamprenet Vale		- 2	ment links (harges) 🖉		

Click on the **New Row** button to repeat steps for the next task. Click on the 🛅 icon to save when finish.

Central Shops as support (if applicable)

If the Planned Job requires support from Central Shops, the Lead Craft will insert a separate task record and **additionally** fill in the appropriate **Category** and **Routing Code** for that task (Central Shops tasks only).

For example:

Description: CS- HW Fabricate cap for water line. Category Code: WELDER

Route Code: **CS-HW-PL** (Select the route code that begins with CS and end with PL)

50 50	CS- HW Fabricate cap for water line	a	1431 99 8:00 WAPPR	💝 🗇
* Task: 50 * CS- HW Fabricate cap for water line	Sequence:	Status: WAPPR	Section: 1431	enta 📝
* Location: S-13475	Estimated Duration: 8:00	Time Remaining:	Accepts Charg	jes?
Asset: >>	* Cost Center: 0001885001	Ref WO: 14183041 >>>	Job Type: 99 GL Acco	unt:
Scheduled Start: 15 Scheduled Finah: 15	Target Start: 7/1/13 12:00 AM 🚯	Actual Start:	Category Code: WELDER Route Code: CS-HW-PL	
Inspector: >>>	Measurement Date:	B	Observation:	
Measurement Point:	Measurement Value:		Inherit Status Changes? 🗹	
				New Row

Plan Labor

Each Task Line created above shall have a corresponding Labor line entry. Refine the existing labor lines that were created by the CPM/Requestor. To create a new Plan Labor, click on the **New Row** button under the **Labor** tab.





Labor	Materials Services	Tools					
Labor	▶ Filer > 0,1,2,1 ↔	0-0 of 0					cs. <u>Download</u> [=
	Task	Craft	Craft Description	Labor Category	Quantity	Hours Rate	Line Cost
				No rows to display			
							Select Craft New Row

Task ID: Enter the Task you are estimating the labor for (e.g. Task ID 10).

Craft Code: Enter the two-letter craft code of the craft that will be performing the task

Quantity: The system defaults the value to 1, but it can be changed to any number of employees you estimate will be needed on the task.

Labor Cat: The system defaults LR (Labor Regular), but can be changed to LO (Labor Overtime) if applicable.

Hours: Hours for **each** employee working on the task. The system automatically populates the hours based on the corresponding Task (duration field).



Click on the **New Row** button to repeat steps for the next task.

When you are done refining and adding additional tasks and labor, change the status to **In Planning** (INPLAN).

Change the status to In Planning (INPLAN)

Click on the Change Status 🔽 icon in the top toolbar.

₩ Ξ	Work C	Order Ti	racking		-			Eufetina (0)	Espath	Polie
ly Open Service	Call + Find 1	Work Orde	r (Q • Select	Action	• 💿 🖬		•		
ListView	Work Order	Plans	WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan	Log	Deficient
	Class: Work Order	WORKOF	RDEF	lars had 8 cold up	far lines in Main Duddi	-		Parent WO: Work Type	CH.	»

A **Change Status** window will appear. Select **In Planning (INPLAN)** from the New Status dropdown menu and click on the **OK** button.





Work Order	38287840	Replace hot & cold water lines in Main	Building	103		
Status	WAPPR	Waiting on approval			-	
		New Status:	In Planning (INPLAN)		
		Status Date:	9/6/24 8:01 AM	13		1
		Reason:			*	
		Reference WO#	0,			
		Memo:				
vint or Email Wor	k Order Report v	hen change status in background selected?				
		Change work order status in back ground?				
	the file	the E will be Wed Order Charge Plates	iennifer leff@lausd.net			
	Peptine	ation E-mail for work order change status.	lease and an arrest			4

11. LEAD LABOR GROUP DETERMINE IF SUB LABOR GROUP WILL BE NEEDED

The Lead Labor Group/Planner or Designee performs these functions.

Based on scope, determine if sub labor group is needed to assist in planning. If yes, route the job package to the pertinent sub labor groups.

Each sub labor group to create additional tasks and planned labor (if necessary) in sequential order. **See instruction on page 17 and 18** on how to plan task and labor.

As each of the sub labor group tasks are complete. The individual sub labor groups will need to change the individual task statuses from Waiting on Approval (WAPPR) to Waiting on Review (WREVIEW).

						C♣ <u>Downlo</u>	ad : =
Summary		Section	Job Type	Est Dur	Status		
AA- Remove 5x7 wall to expose hot and cold water lines.	t ₽	1431	99	60:00	INPLAN	**	ŵ
GA- Remove and replace hot and cold water lines.	₽	1431	99	240:00	INPLAN	*	1
AA- Patch wall	13	1431	99	40:00	INPLAN	*	ŵ
CA- Paint wall to match existing color	t	1431	99	2:00	INPLAN	*	1
CS- HW Fabricate cap for water line	t p	1431	99	8:00	INPLAN	*	Ť
EA - Test interior electrical outlets	1	1431	99	2:00	WAPPR	**	

Click on the Change Status **F** icon against the individual task line.

A **Change Status** window will appear. Select **Waiting on Review (WREVIEW)** from the New Status dropdown menu and click on the **OK** button.

nge Status				
Work Order:	38287840	Replace hot & cold water lines in Main	Building 抗	
Status	WAPPR	Waiting on approval		
		New Status:	Waiting on Review (WR	eview)
		Status Date:	9/6/24 8:01 AM	10
		Reason:		.w.
		Reference WO#:	9	
		Memo:		
nt or Email Wor	k Order Report w	hen change status in background selected?		
		Change work order status in back ground?		
	Notific	ation E-mail for Work Order Change Status:	jennifer leff@lausd net	
				ок





Repeat status change steps for all sub labor group task lines.

12. CREATE MATERIAL ESTIMATES

Material estimates consist of Planned Contract, Planned Material, and Mileage.

To create Material estimates, click on the Materials tab.

Labor Materials		pols		
Materials 📄 🕨 Filte	r > 🔍 🧷	∂ ₽ Φ 0	- 0 of 0 🛒	>
Task	<u>Mat Cat</u>	Line Type	<u>Craft</u>	<u>It</u> e
				_

Click on the New Row button to create a new Material estimate line.

Later M	nterios Servic	es Tools											
Meterials 2	Filer > C. (212 212	o.oaro 🗢									of the second	•
-	Task	Het Car	Lite Tripe	Craft	840	Description		Quetty	Ava Cost	Lite-Ceal Stamport	Direct base?	1	7
							. No research display						
										Select Materials	Select Asset Spare Parts	. New R	tow

Enter the following

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.
Material Cat	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.
Description	Enter the two-letter Craft Code, and a brief Description of the Material item. For example, EA-Electrical Materials or EA- Mileage .
Quantity	The system automatically provides "1", but you can change to quantify estimate.
Craft	Enter the Labor Group's two-letter Craft Code in the Craft Code field and tab to the part field
Order Unit	Enter EA for each.
Avg Cost	Enter the Total Estimated Cost of Materials for the corresponding Task Line.





Labor Value	-	Services Tools												
Materials D	- Tiber		On-net O										06 <u>Down</u>	8ad =
		THE CAR	Lite Type	Gat	ht		Generation		Guettly	Auss	and Line Cod	Shewcast	Cred Issue	e
v 18	Q,	un Q	847584	AA		2Þ	AA- Carpentry Talenais	6	1.00	1	00 0.00	>		1
	ant [10 Q					Dred issue?	Unit Cost Dranged?	97			re.	*	
* Theiral Callege	ay the	a.					Order Line EA	Stock Category:				PRUNE		
* Lite Ty	oe uy	NH	mentro Ilidentale				Indirect Rate: 1.193	Requested By	782846 04			Condition Rade		
+ Guard		1.00					Burden Unit Cost	Required Date	111/13 12:00 AB	48		Candilian Cade	a.	
Storero	-	*					Burden Line Cost. 0.50	baue To:	»		Car	allon Enabled?		
+0	1 7 AA	>					* Aug Cost 5000	Ventor WD#			-	eevelen Type Autosat	E *	
											Select Valenale	Salact Aanat Spara Par		en Row

Click on **New Row** to add additional planned Material cost. When complete, Click on the icon to save.

13. LEAD PLANNER CHANGE STATUS OF WORK ORDER TO WAITING ON REVIEW (WREVIEW). PRINT PLANNER DATA ENTRY AND ROUTE PLANNED JOB TO CPM/REQUESTOR

The Lead Planner or Designee performs these functions.

Change work order status to Waiting on Review (WREVIEW)

Click on the Cha	nge S	tatus	루 icon i	n the top t	oolbar.				
Mark C	order Tra	acking					Euletins: (0)	Reports	
My Open Service Call * Find V	Nork Order		🔍 🔹 Select /	Action	• 💿 🖬	2	• 🕸 💱		
List View Work Order	Plans	WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan	Log	Deficienci
Class	WORKOR	DEF					Parent WO		
Work Order:	38287840	Rep	lace hot & cold wat	ler lines in Main Buildi	ng 🛃		Work Type:	CM	9

A Change Status window will appear. Select Waiting on Review (WREVIEW) from the New Status dropdown menu and click on the OK button.

inge Status					
Work Order:	38287840	Replace hot & cold water lines in Main	Building	1.	
Status:	WAPPR	Waiting on approval			
		New Status:	Waiting on Review	(WREVIEW)	
		Status Date:	9/6/24 8:01 AM	- B	
		Reason:			
		Reference WO#:	Q		
		Memo:			
nt or Email Wor	k Order Report v	when change status in background selected?			
		Change work order status in back ground?			
	Notific	cation E-mail for Work Order Change Status:	jennifer.leff@lausd.ne	et	
		-			
					On

Print Planner Data Entry Report

To print the Planner Data Entry report, on the work order, click on the **Select Action** dropdown icon and select **Run Reports**.





Work C	arder Treck	ing				
Open Service Call = Find	Work Order	a		Selec	táchan	
Vitat Unit Class Vitat Over Cost Over Locator Locator Locator Asiot Abi Type	Plana (10) Wolksoncer 36237340 8601005301 5-13475 FREMONT SH	Detain Region (L. Fractur (L. Fractur (L. Fractur (L. Fractur)	Ausigns a tot & ONT SH	4	Charger Halve Angly Scha Vere Sche Delastifikerstart Schle Charger Visik Drate Options Charger Vere Crautin Julik Plan Veron Wook Plan Remone Varity Plan	
Crist Socker, GL Account, Roguestur Heg. Tite Change Status on Cite U Vol. Is Teat?		Dieta	i Savd	8	Zapty Anna Dana Ualah Radingu Rapati Towitow Nanago Countras History Aangar to New Parent NovoCloopAndsty Edit Hally Walk Order Hendredd Universy Assgements Solied Owner	
Scheduling Information				-	Copy Destines to Week under	
Start Target / Planning Start Scheduled Const Start		3	7410		Antoniant Larger offers Dapticale Work Order Add to Eosterunte Enter Inspection Results	
Const. Actual Start. Close Out Start. Start No Earlier Than:		20			Ban Roperte Cogene Analytice Apply the dynamic calculation	

A **Reports** window will appear. Search, "Planner" in the bar beneath **Description** and click on the **Planner_Data_Entry** report.

Reports and Schedules	
Reports Schedules	
🗢 Filter 🔸 🔍 🕴 🏄 🕆 🗟	👌 🔆 1 - 1 of 1 🔷 🛛 🔂 Download 🕴 🗖
Description	
Planner	
Planner_Data_Entry	
	Create Report Cancel

A Request Page will appear. Click on the Submit button.

Parameters		-
	Print modified (02 Change Worksheet) (Y or N):	
Schedule		-
Immediate		
At this Time	1	
Recurring	Q	
Email		
Schedule format o	ptions	





A new **BIRT Report Viewer** window will appear. Review the Planner Data Entry report. To print, click on the \blacksquare icon. The report will be exported into a PDF file where you can begin the print.

Reporting												
Page 1	of 2	10.0	۵ 🌾) (14	<						
Los Ange	les Unified :	School Distri	let .						м	Exi Faci lainten Operat	sting lities ance & tions	
P	lanner	Data E	Intr	y					w	D#3	829	2438
								Par	ent W	D#		
School Name FREMONT SH	Reque	sted By	Phone	,	Reported 9/9/24		Year (*) 25	G/L/	Account		Cost (Center (loc) 65001
Loc/Asset	Bidg Ins	ID		Lead Craft		St	atus	Sch	eduled Da	tes		
5-13475	-			MA		W	APPR	Sta	rt	Fi	nish	
		17.00										
iA - Turn off water supp A - Remove wall A - Remove and replac A - Part Wall 4 - Part Wall 'lanned or Written By upervisor's Signatur	e hot and c	old water line	5	Date Plat	nned /	lopn	oved By oved By Ot	hers		De	ate ate	
				Bu	ver Line	_						
Cost Center		WBS	10	Pro	gram	_	F	unctio	nal Area			Fund
			PLANN	ER USE O	NLY - Estim	ated	Labor					
n Labor C	raft				Reg Rate		OT Rate	R	eg Hrs	OT	Hrs	Labor Est
A60 A	A: Carpenter			Estima	75.78	1	0.00		4.00		0.00	303.12
n Tune ('raft			Estima	ted Material	-	Contract		Other	Mile	300	Imprest
HOURS:	4.00	CONTRACT			In	dire	ct Labor Ch	aroe:	ound	PIIK	age.	\$95.44
LABOR:	\$303.12	MILEAGE			Nor	-Pro	od Labor Ch	arge:				\$72.56
ATERIALS:		IMPREST	-		Indi	rect	Material Ch	arge:				\$0.00
OTHER:		SUB TOTAL	-	\$303 1	12		(***) TO	TAL:			-	\$471.12
* Fiscal Year Include FU *** Total = Sul	when W.O. w VDED, INPRO, D Total + India	as changed to R FCOMR, COMR, rect Labor (Reg	WINDED WINSP, and OT)	or later statu PCOMR REW + Non-Prod	is, else if not y IORK, SCH, or uctive Labor (R	et fun CLOS Ag an	ided, current f E. id OT) + Indir	facal ye ect Mat	an Post-fun erial	ded W.O), status	es assumed to
lep 9, 2024, 9:38 AM	Report Filmar	w Planar_Dat	a Days	ptiletign								

Submit the report to the CPM or Designee for review and approval.

14. CPM REVIEWS PLANNER DATA ENTRY, PRINT PROJECT COST ESTIMATE REPORT, SUBMIT REPORT TO REQUESTOR FOR FUNDING AND ENTER IN MAXIMO

The CPM or Designee performs these functions.

Review the Planner Data Entry. If approve, print the **Project Cost Estimate** report and submit to requestor for funding line. If you do not approve of the estimate, return Planner Data Entry form back to lead craft for adjustments.

In the **Plans tab** of the Work Order, you may enter additional information to be populated on the Project Cost Estimate report in the **Proj Cost Desc**. field.





	Work C	order Tracki	ng			
y Open Service	Call Find	Nork Order	Q	Select	Action	
List View	Work Order	Plans	A	ssignments	Failure Reporting	Relat
Work Order:	38292438	* Replace ho	it & cold wate	r lines in Main	Building	
roj Cost Desc:	Complete repla	cement of the hot	and cold wate	er lines in Main	building; estimate inc	ud 📜

Project Cost Estimate Report

To print the Project Cost Estimate report, on the work order, click on the **Select Action** dropdown icon and select **Run Reports**.

Work Work	Urder Track	ling			and the second division of the second divisio	
ry Open Derivoe Call * Find	triorik Onder	3	<i>z</i> •	1	e Auton (*) Change Hicke	
Cana Vision Conter Unite Unite Cost Conter Doctor Cost Conter Doctor Doctor Net Sector Regulate Reg. Tala Change Status on Cikiel WO'u' In Territ	Parx 855 910940080255 35537549 555387549 555397549 555397549 555397549 55539755555555555555555555555555555555	Enten Fag Q FRE D FRE Cor Cor Cor	Antigen daca hof & Cacle 7 Ser Cacle 7 Ser Cacle 7 Ser	200 ···································	Argen Scher Veien TLAs Delettifbeneted SLAs Charges Weit Onter Optimes Crose And Plan trans Unei-Plan New Conter Jahl Plan trans Unei-Plan Deletti Schröp Hallands Derense Weit Plan Schrös Schröp Hallands Deren Schröp Hallands Deren Schröp Hallands Deletti Schröp Hallands	
					Capy Excludes to Wark and an Utractoment Library/Fastern	
Tagel / Playing Slat.		1	5		Dapicale Work Order Add to Bockmarks Enter Inspection Results	
Close Out Statt		1			Ren Deprete Cognes Analytics Apply the dynamic calculation	r

In the Reports window, click on the Project Cost Estimate report.

Reports and Schedules
Reports Schedules
Filter > Q 2 3 + 4 + 0 + 4 + 0 + 4 ⇒ C Download =
Description
project
Project Cost Estimate - No Parameters Version
M&O Project Planning Date Problems
Project Units Request to Plan (RTP)
Project_Cost_Estimate
Create Report Cancel





In the Request Page, type in the **Requestors Name, Title, and Phone** and the **Submit** button when finish.

		-
Parameters		-
Print Modified (Y or N)::		
Jennifer Leff Requestor Name:::		
Admin Analyst Requestor Title::		I
(213)-241-3751 Requestor Phone:::		
Requestor Fax:	<i>le</i>	
Schedule		•
Immediate		
At this Time		
Recurring		
Email		
		-

The Project Cost Estimate report will appear.





	ngeles Unified School I	District				F Main Op	Existing Facilities thenance & erations
	Project Co	st Estimate			v	V.O.# 382	292438
School Name:	FF	EMONT SH		Com	plex Name:		FREMONT
Cost Center:	00	01865001					
Requester Name:	Je	nnifer Leff	Title:	Admin	Analyst		
Date of Request:	9/9/24 D	ate of Estimate: 9/9/2	4	Phone:	(213)-241-3	3751 FAX:	
					Additional	Funds Needed: Total Cost:	\$471.12
 Final cost may incr Project will not be All changes to the approval must be ob Estimate includes f site administrator. Costs, including fri currently in place. 	ease due to unforeseer scheduled until an estin project which affect the tained prior to the star ringe benefits for empl nge benefits, may appe	conditions or changes in nate form is signed by th cost will be reviewed or t of work. syses performing the wo ar several months after	n the sco ne site ad n a separa rk. All pr project ha	pe of work. ministrator ate form by oject costs as been con	the site admir will be charged npleted. This is	histrator. The sit I to the funding s due to the acc	te administrator's line(s) provided by th counting system
		School Designated	Funding	Source			
Cost (Center	or W	10 or 14	Project)		and Prog	aram (reqd)
Pre	parer Signature	Date		Re	quester Sign	ature	Date
	Estima	te valid for 30 days fr	om date	of prepare	er's signature	h	
Sep 9, 2024, 9:49 AM	Report Filename: Projec	t_Cost_Estimate.rptdesign					

Print and submit the **Project Cost Estimate** report to the requestor for funding information.

After receiving a signed **Project Cost Estimate** report with funding information. Insert the funding information into the work order.

Go to the **WO Details** tab of the work order.

	Work	Order T	racking			_
My Open Servio	ce Call 👻 Find	Work Orde	er 🔍 🗸		Select Action	
List View	Work Order	Plans	WO Details		Failure Reporting	R
Work Order:	38292438	* Repl	ace hot & cold water li	nes	in Main Building	Ļ

Click on the **New Row** button on the bottom right of the page.

Project Outails						-
SAP Project Id	Project ld:	COLIN Program Type:		COLIN Preject Type:	Program	٩
Inter > O.(1.21)⊗						(6 Devriced) =
Eurol Line	Salar Line		Burn Line		Band's	200
			There are no rows to display.			
						New Row





Under the **Fund Line** field, type in the word **BUYER**, you may also use the magnifying glass or to select the word **BUYER** from the value list.

Fund Line	
BUYER	

Under the **Buyer Line** field, click on the magnifying glass with the select the appropriate funding line provided.

Buyer Line	

A Select Value window will appear. Based on the funding line provided, you will either enter a **Cost Center** and **Program** combination or a **WBS** and **Program** combination. Click on **CC** for **Cost Center** or **WBS** to start.

Organization: LAUSDORG	Site: LAUSD
Build your GL Account by selecting value	es for each component from the table below. Click OK to return the GL Account
GL Account: ??????? : ??????????????????????????	17777777777 - 77777 - 7777777777 - Sagmant ACCT TVPF
C Revent IIIIII - IIIIII	Segment According to Segment According to Segment
🗸 Filter 🤌 🔍 🕹 🥵 1	- 4 of 4 Download
GL Component Value	Description
4	
	Cost Center (Schools/Orgs)
3L	GL Account (Store Rooms)
0	Internal Order (Job Cost)

After you select CC or WBS, a value list will appear. Search/Select the appropriate CC/WBS value.





elect Value	
Organization: LAUSDORG	Site: LAUSD
GL Component Value	Description
000006000000	LABOR - VANDALISM - REGULAR SCHOOLS
000006000001	LABOR-WINDOW/WALL WASHING-REGULAR SCHOOL
000006000002	REPAIR OF BLDG.
000006000003	REPAIR OF BLDG.
000006000004	REPAIRS OF BLDG
000006000005	RESTROOM REPAIRS
000006000006	REPAIR OF OPERATIONAL EQUIPT.
000006000007	PEST MANAGEMENT SALARY - CAFE
0000108001	-
0001000059	SFSP Central High UAII (Cafe) - 1512
	Clear OK Cancel

You may search by typing in the value in the search field and hit enter. To select the value, click on the value itself.

Organization: LAUSDORG	LAUSD
Build your GL Account by selecting val	ues for each component from the table below. Click OK to return the GL Account.
GL Account: CC : ????????????????????????????????	???????? - ????? - ???????????????????
😎 Filter 🔿 🔍 🛛 🦧 🕯 🍦 👘	1 - 10 of 736 🏟 🛛 🖓 🛤
GL Component Value	Description
	fremont
0001068001	Facilities F - Fremont Annex (INACTIVE) - 0680
0001167901	Fremont HS Health Clinic - 1679
0001352001	Fremont CoS -
0001865001	Fremont SH - 8650
0001865002	Fremont Math/Sci Mag - 8651
0001865003	New Fremont High School(INACTIVE) - 8655
0001865009	Fremont Enrichment Academy (INACTIVE) - 8860
0001865017	9th Grade Center - Fremont - 7660
0001899526	Fremont CAS/AEWC - 9494
*****	Example Washington CAR 0154

Type in the program in the search field and hit enter. To select the value, click on the value itself.





Organization: LAUSDORG	Site: LAUSD	
Build your GL Account by selecting value	ues for each component from the table below. Click OK to return th	he GL Account
GL Account: CC : 0001865001 - ????? -	<u>?????????</u> - Segment: PROGRAM 💌	
🔻 Filter 👌 🔍 🖓 🌵 🌳	21 - 30 of 1111 🖨 🛛 🖓	wnload 📒 🚍
GL Component Value	Description	
4		
10048	Electrical	
10049	Safety & Technology	
10050	Exterior Paint	
10051	Interior Paint	
10052	Wall Systems	
10053	Floor Coverings	
10054	Lockers	
10055	Locks	
10056	Lunch Shelters	
10057	Plumbing	

After selecting both the CC/WBS and the Program, click on the OK button.

Organization: LAUSDORG	Site: LAUSD
Build your GL Account by selecting val	ues for each component from the table below. Click OK to return the GL Account
✓ Filter > Q ↓ ☆ ↓ ☆ ↓ ↓	21 - 30 of 40 🌳 🚯 Download 🗧
GL Component Value	Description
470090	Other Food Service Supplies (4790)
520002	Travel/Conference Attendance (5202)
530001	Dues and Membership (5301)
540050	Other Insurance (5450)
550005	Rubbish Disposal (5505)
550007	Laundry Service (5507)
560001	Rental Of Facilities (5601)
560002	Maintenance Of Facilities (5602)
560006	Maintenance Of Equipment (5606)

The funding line will appear on the **Buyer Line** field.





Buyer Line	
CC:0001865001-17398	9

Click on the 💷 icon to save when finish.

Verify the construction and close out **Start/Finish dates** in the Scheduling Information section of the work order. The **Duration** should automatically populate.

Start	-	Finish	•
Target / Planning Start: 9/10/24 3:02 PM		Target / Planning Finish: 10/9/24 3:02 PM	
Scheduled Const. Start: 9/10/24 3:02 PM		Scheduled Const. Finish: 11/8/24 3:02 PM	
Const. Actual Start:	1	Const. Actual Finish:	
Close Out Start: 9/11/24 3:02 PM		Close Out Finish: 12/13/24 3:02 PM	
Start No Earlier Than:	1	Finish No Later Than:	
* Duration: 2:00		Predecessors:	»
Time Remaining:		Include Tasks in Schedule?	
Activity Type:		Work Group:	

15. CHANGE STATUS OF WORK ORDER TO READY FOR REVIEW (REVIEW) AND SUBMIT PLANNED JOB TO AFSD

Change the status of the work to **Ready for Review (REVIEW)** and proceed to the next step.

Change work order status to Ready for Review (REVIEW)

Click on the Change Status Ficon in the top toolbar.

☆ Ξ Work	Order Tracking					<u>B</u> ulletins: (0)	Beports	Profile
My Open Service Call Find	I Work Order	Q - Select	Action	* 🖬 🖬	2 4	🔶 😵	-	
List View Work Order	Plans WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan	Log	Deficient
Class + Work Order	* WORKORDEF * 38286375 •	replace hot and col	d water lines in the main	n building 🌅		Parent WO • Work Type	CM	>> (

A Change Status window will appear. Select Ready for Review (REVIEW) from the New Status dropdown menu and click on the OK button.





ige Status			
Work Order:	38286375	Replace hot & cold water lines in Main Building	
Status:	WREVIEW	Walting on Review (WREVIEW)	
		New Status: Ready for Rev	
		* Status Date: 9/9/24 3:11 PM	
		Memo:	
	Pr	int Work Order(s)?	
Change	work order state	us in back ground?	
Votification E-m	nail for Work Ord	ler Change Status: jennifer.leff@lausd.net	

Route job package to AFSD for review.

16. AFSD REVIEW THE PLANNED JOB, CHANGE STATUS OF WORK ORDER TO PENDING FUNDING (PFUND) AND RETURN JOB PACKAGE TO CLERICAL

The AFSD or Designee performs these functions.

Review the Planned Job package. If approve, change the status of the work to **Pending Funding (PFUNDED)** and proceed to the next step. If not, return the Planned Job Package back to the CPM for adjustments.

Change work order status to Pending Funded (PFUND)

Click on the Change Status 🔽 icon in the top toolbar.

			0		* (#C2)	- 🔁 🖬	2 4	🗣 💱		
open service (can •] Find	TOR OTDER		A + Select	ACION	0				
ist View	Work Order	Plans	WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan	Log	Deficienc
		MODILOD	DEE					Parent WO:	1	>>
	Class:	WORKOR	DEF							

A **Change Status** window will appear. Select **Pending Funding (PFUND)** from the New Status dropdown menu and click on the **OK** button.

ngo status			
Work Order: 3828637	5 Replace hot &	cold water lines in Main Building	2
Status: WREVIEW	Waiting on Re	view (WREVIEW)	
	* New Status: * Status Date:	Pending Fundin	
	Memo:		
	Print Work Order(s)?		
Change work order	status in back ground?		
lotification E-mail for Wor	k Order Change Status:	jennifer.leff@lausd.net	

Submit Job Package to Clerical to generate Internal Order.





17. CHANGE STATUS TO READY TO INTERFACE (INTREADY) TO GENERATE INTERNAL ORDER

Clerical Department will perform this action

Change work order status to Ready to Interface (INTREADY)

Click on the Change Status 😵 icon in the top toolbar.						
★	<u>B</u> ulletins: (0) <u>R</u> eports <u>P</u> rofile					
My Open Service Cal 🔻 Find Work Order						
List View Work Order Plans WO Details Assignments Failure Reporting Related Records Actuals	Safety Plan Log Deficience					
Class: WORKORDEF Work Order: 38286375	Parent WO:					

A **Change Status** window will appear. Select **Ready to Interface (INTREADY)** from the New Status dropdown menu and click on the **OK** button.

nge Status		
Work Order: 38286375	Replace hot & cold water lines in Main Building	1
Status: PFUND	Pending Funding (PFUND)	
	New Status: Ready to Interf	
	• Status Date: 9/9/24 3:11 PM	
	Memo:	
	Gat Work Order(a)2	
Change work order stat	us in back ground?	
Notification E-mail for Work Or	der Change Status: jennifer.leff@lausd.net	
		ОК

INTERFACE SCHEDULE AND STATUSES

Maximo will interface the Planned Job information into SAP Hourly to generate an Internal Order (IO). See below for the Interface status definitions and actions.

Ready to Interface (INTREADY) – This status marks the WO to interface to SAP. If your WO is in this status, you can still change the status back to **PFUND** if you need to make changes to the WO.

Interface in Session (INTSESSION) – The WO is change to the **INTSESSION** status when it is in the process of interfacing with SAP. When the WO is in the **INTSESSION** status, you cannot make any changes to the WO.

Error In Interface (INTREJECT) – The WO completed its interface but was rejected due to any of the following reasons: Invalid Cost Center, Invalid WBS, Invalid Program, etc...If your WO rejected during the interface, the reason will be displayed on the Work Order tab.





Sample Screen shot of Reject reason:

I Records	Find Work Orde	Q •	Select Action	- 0 0	2 4	* *
ListView	Work Order Plans	WO Details Ass	ignments Failure Reporting	Related Records	Actuals	Safety Plan

FUNDED - The WO completed its interface and an Internal Order number was created successfully.

The **CPM** and **Clerical** staff who changed the status of the WO to **Ready to Interface (INTREADY)** will receive an email should the interface Rejects or was Successful. If the **Internal Order (IO) number** was created successfully, the **IO number** will appear on the email.

Clerical to submit job package back to CPM/Designee when job is funded.

18. CPM ROUTES JOB PACKAGE TO THE LEAD CRAFT

- 19. LEAD CRAFT DISTRIBUTES THE SUB LABOR GROUP PACKAGES (IF APPLICABLE)
- 20. THE SCHEDULED START/FINISH DATES WILL BE DETERMINED IN THE AREA BOOK MEETING
- 21. LEAD CRAFT CHANGE THE STATUS TO WORK ORDER SCHEDULED (SCH) AND INSERT BOTH SCHEDULED START/FINISH DATES

The Lead Planner or Designee performs these functions.

Insert the Scheduled Const. Start/Finish date to the work order.

Start	-	Finish	
Target / Planning Start. 4/22/24 12:45 Pl	۰ 🖏	Target / Planning Finish: 4/22/24 2:30 PM	
cheduled Const. Start: 4/29/24 6:00 AM		Scheduled Const. Finish: 6/21/24 2:30 PM	
Const. Actual Start: 4/30/24 6:00 AM		Const. Actual Finish: 6/28/24 12:44 PM	
Close Out Start: 6/29/24 6:00 AM	1	Close Out Finish: 7/9/24 2:30 PM	1
Start No Earlier Than: 4/29/24 6:00 AM	1	Finish No Later Than: 6/21/24 2:30 PM	1
+ Duration: 2:00		Predecessors:	
Time Remaining:		Include Tasks in Schedule?	
Activity Type:	0	Work Group:	





Change work order status to Scheduled (SCH)

金田	Work Order	Tracking					Endertwis (D)	Espots	
My Open Service	Call * Find Work Ord	er	Q 🕶 Select	Action	• 🖬 🖬	2			
ListView	Work Order Plane	WO Details	Assignments	Falure Reporting	Related Records	Actuals	Satety Plan	Log	Deficien
ListVerw	Work Order Plane	WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan Parent WO	Log	Deficien

A **Change Status** window will appear. Select **Scheduled (SCH)** from the New Status dropdown menu and click on the **OK** button.

ange status					
Work Order:	36765045	Access to Food Services and Special S	Services Employee an		
Status WAPPR		Waiting on approval			
		New Status:	Scheduled (SCH)		
		Status Date:	9/10/24 10:42 AM	13	
		Reason:			*
		Reference WO#:	Q		
		Memo:			
Print or Email Wor	k Order Report w	hen change status in background selected?			
		Change work order status in back ground?			
	Notific	ation E-mail for Work Order Change Status:	jennifer leff@lausd.ne	et	

22. WORK COMMENCES, FIRST CRAFT CHANGE STATUS OF THE WORK ORDER TO IN PROGRESS (INPRG)

The <u>First Craft</u> on the Job performs this function.

Change work order status to In Progress (INPRG)

Click on the Char	ngeStatus 🏅	icon in the top t	oolbar.		
A E Work Or	der Tracking			Quiletins (0) Ber	orts Bruthe
My Open Service Call 👻 Find W	ork Order 🔍 🔍	 Select Action 	• 🔁 🖬 🥒	0 4 W	
List View Work Order	Plans WO Details	Assignments Failure Reporting	Related Records Actuals	Safety Plan L	og Deficienci
Class Work Order:	NORKORDEF 18286375 • repla	ace hot and cold water lines in the mail	n building	Parent WO:	»

A **Change Status** window will appear. Select **In Progress (INPRG)** from the New Status dropdown menu and click on the **OK** button.





Work Order:	36765045	Access to Food Services and Special S	Services Employee an		
Status	WAPPR	Waiting on approval			
		* New Status:	In progress		
		Status Date:	9/10/24 10:42 AM	3	
		Reason:		*	
		Reference WO#:	0		
		Memo:			
Print or Email Wor	k Order Report v	when change status in background selected?			
		Change work order status in back ground?			
	Notifi	cation E-mail for Work Order Change Status:	jennifer.leff@lausd.net		

23. INCREASE / DECREASE PLAN AMOUNT (O2 CHANGE)

First select the **Plans** tab and look under the **Tasks for Work Order** subtab.



Add an additional task following the naming convention of "O2 CHANGE – XXXXXXX". Replace the xxxxx with what the change is (e.g. INCREASE LABOR / MATERIALS, DECREASE LABOR...)





	Ta	sk #	Aat Cat		Craft		\$	summary				4		Section	Job T	ype		Est Dur	51
~		20						02 CHANGE - INCREA	SE LABOR	۲.				1393				2:00	N
+ Task:		20	• 0	CHA	NGE - IN	CREASE	LABOR	۹	11	•	Cost Center:	0001049301	0	Status:	WAPPR			GL Accou	nt
Location	S-13913		» M &	O AR	EA C3				1	Estima	ted Duration:	2:0	0	Ref WO:	3829563	16 🕕	»	 Section 	in
Asset			»						14	Ca	tegory Code:	MAX	0	Route Code:	MAX-16	0		Job Typ	e
		Inspe	ctor:		>>			Measurement D)ate:			1		Observa	tion:				
	Measurer	nent P	oint:		>>			Measurement Va	alue:			~	Inhe	wit Status Chang	ges? 🔽				
Labor	Filter	× Q	s 2	Tool	8 } (> 1	1 - 3 of 3													
Labor	Fiter	> Q	s 2	Tool	ls] ₽ ∲ 1	1 - 3 of 3													
Labor	Fiter	× Q	s 2 Task	Tool	is De j 🔶 1 Craft	1 - 3 of 3	\$	Craft Description		Labor Ca	legory.			Quantity		H	lours	Rate	
Labor	Fiter	> 0,	s Dan Task	Tool	ls Graft PLM1	1 - 3 of 3	<i>ي</i>	Craft Description Plant Manager I		Labor Ca	fegory Q			<u>Quantity</u> 1		H :	<u>iours</u> 2:00	<u>Rate</u> 54.54	
Labor	Filter	> Q	s Task		Is Craft PLM1 PLM1	1 - 3 of 3 >>>	٩	Craft Description Plant Manager I Plant Manager I		Labor Ca LR LR	fegory Q			<u>Quantity</u> 1		H	<u>iours</u> 2:00	<u>Rate</u> 54.54 54.54	
Labor	Filter	× Q	s Task	Tool	IS Craft PLM1 PLM1	1 - 3 of 3 >> >> >>	<u>ې</u>	Craft Description Plant Manager I Plant Manager I		Labor Ca LR LR LR	ingory C. C.			<u>Quantity</u> 1 1		H :	<u>iours</u> 2:00 1 2:00	Rate 54.54 54.54 0.00	
Labor	Filter	> Q	s Task		s Craft PLM1 PLM1	1 - 3 of 3 >> >>	¢	Craft Description Plant Manager I Plant Manager I		Labor Ca LR LR LR	fegory Q Q Crew:) »	Quantity 1 1 Productive	Rate:	H : : : : : : :	2:00 1 2:00	Rate 54.54 54.54 0.00 Burdene	0
Labor	Fiter	> Q	s Task		IS Craft PLM1 PLM1	1 - 3 of 3 >> >> >>	<u>ي</u>	Craft Description Plant Manager I Plant Manager I		Labor Ca LR LR LR	legory Q Q Crew: + Hours:] ≫	Quantity 1 1 Productive Non Productive	Rate:	<u>H</u> : : : : : : : : : : : : : : : : : : :	1 2:00 1 2:00 4	Rate 54.54 54.54 0.00 Burdene Pro	0
Labor	Filter	» (),	s Task		IS Craft PLM1 PLM1	1 - 3 of 3 >> >> >>	\$	Craft Description Plant Manager I Plant Manager I		Labor Ca LR LR LR	Ergory Q Q Crew: + Hours: + Quantity:] ≫	Quantity 1 1 Productive Non Productive Indirect	Rate:	<u>H</u> : : : : : : : : : : : : : : : : : : :	1 2:00 1 2:00	Rate 54.54 54.54 0.00 Burdene Pro	d d
Labor	Filter Task: Group: Vraft:	> Q	s Task		IS Craft PLM1 PLM1 ant Manag	1 - 3 of 3 >> >> >> per I	÷	Craft Description Plant Manager I Plant Manager I		Labor Ca LR LR LR UR	teoory Q Q Crew: • Hours: • Quantity: dened Rate:	54.54) »	Quantity 1 1 Productive Non Productive Indirect	Rate:	H : : : : : : : : : : : : : : : : : : :	2:00 1 2:00 4 0	Rate 54.54 54.54 0.00 Burdene Pro	d

To decrease the plan amount, remove or reduce the hours or materials that were originally planned.

Print the revised Planner Data Entry and Project Cost Estimate. For the Planner Data Entry, go to **Select Action**, then **Run Reports**.



Enter "planner" into the Description search bar and click either Create Report or the parameter itself.





Reports and Schedules	
Reports Schedules	
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Description	
planner	-
Planner_Data_Entry	
Create Report	I

In the Request page, enter, "Y", indicating that yes, you would like the **Print modified (02 Change Worksheet)**, then click **Submit**.

Parameters		,
Print	modified (02 Change Worksheet) (Y or N):	
Schedule		1
Immediate		
At this Time	100	
Recurring	0	
Email		l
Schedule format options		





Los Angeles	Unified School Distr	ict			Ma O	Existing Facilities intenance & perations	
Modifie	d Planner D	ata Entry			WO Parent WO	#3676	5045
School Name SCHOOL SVS-M&O C3(CS	Requested By Dwyna Blackmon	Phone R 5.	eported /31/23	Year (*) 25	G/L Account	Cost 0 00010	Center (loc) 49301
Loc/Asset	Bldg Ins ID	Lead Craft		Status	Scheduled Date	es	
S-13913		MAX		WAPPR	Start	Finish	
ocation Description:	M & O AREA C3				1		
Supervisor's Signature		Date	Api	proved By Ot	hers	Date	
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Cost Center	WBS	DI ANNER LISE ON	ram	ed Labor	unctional Area		Fund
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	-	Estimate	d Material				
Ln Type Cra	ft		Material	Contract	Other	Mileage	Imprest
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LABOR:	MILEAGE	8	Non-F	rod Labor Ch	arge:		\$0.00
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Sep 10, 2024, 11:14 AM Rej	port Filename: Planner_Do	ta_Entry.rptdesign					

When acquiring your **Project Cost Estimate** Report, go to **Select Action**, then **Run Reports**.

Open Se	ervice Call * Fi	nd Work Order	0	Selec	t Action
				2	Change Status
List Vic Work C	Work Order Order: 36765045 Desc	e Plans WO	Details Assign		Apply SLAs View SLAs Select/Deselect SLAs Change Work Order OpSons Create •
Childre	n of Work Order	36765045 D Filter	AND REAL		View >
WON	<u>IUM</u>	Description			Create Job Plan from Work Plan Remove Work Plan
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Tasks fo	or Work Order 36	765045 👂 Filter	2 - A Badding		Enter Meter Readings
	<u>Task #</u>	Mat Cat	Craft		Report Downtime
1	20				Manage Downtime History
+ Tasi	K 20	+ 02 CHANG	E - INCREASE LAB		Assign to New Parent
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Asse	đ	» 0			Reschedule/Unassign Assignments
	Insp	ector:	**	188	Select Owner
	Measurement	Point		B	Take Ownership
			"		Copy Doclinks to Work order
					Attachment Library/Folders
					Duplicate Work Order
Labor	Materials S	Services Tools			Add to Bookmarks
Labor	Filler	4.8	1-3 of 3		Enter Inspection Results
		Task <u>Craf</u>	1 11 >>>		Run Reports Cognos Analytics
		The PLAN			Apply the dup apple calculation





Enter "cost estimate" into the **Description** search bar and click either **Create Report** or the parameter itself.

Reports	Schedules		
V Filter	> 🔍 🦼 👘	1 - 1 of 1 G& Download	:=
Descriptio	•	1	
cost estim	ale		
Project C	ost Estimate - No	Parameters Version	

Click **Submit** on the **Request Page**. This will open the **Modified Project Cost Estimate** Form. Hand write in the Original Cost and the Additional Funds Needed.

	of 2	1 10 0 0	1¢1	17	1	1	-				
Lord Lord	ngeles Unified	School District								Ex Fac Mainter Opera	isting filities nance <u>6</u> ations
Mo	dified P	roject Co	ost Es	stim	ate	8			W.O.#	# 3676	5045
School Name: Cost Center: Requester Name:		SCHOOL SVS 0001049301	5-M&O C3	(CS				Title:	Comp	lex Name	ы
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Get approvals and submit to clerical for the changes to be interfaced





24. WORK COMPLETE, LEAD LABOR GROUP INSERT ACTUAL FINISH DATE ON WORK ORDER AND CHANGE WORK ORDER STATUS TO FIELD COMPLETE (FCOMP)

The Lead Labor Group performs these functions.

Insert the Cost. Actual Finish date to the work order.

Start	-	Finish	-
Target / Planning Start: 4/15/24 7:00 AM	1	Target / Planning Finish: 5/31/24 7:30 AM	
Scheduled Const. Start: 6/3/24 6:00 AM	1	Scheduled Const. Finish: 6/28/24 2:30 PM	
Const. Actual Start: 6/3/24 6:00 AM	11 0	Const. Actual Finish: 6/28/24 2:30 PM	
Close Out Start:	10	Close Out Finish:	
Start No Earlier Than:	1	Finish No Later Than:	
Duration: 2:00		Predecessors:	>
Time Remaining:		Include Tasks in Schedule?	
Activity Type:	9	Work Group:	

Change work order status to Field Complete (FCOMP)

Click on the Change Status ¹ icon in the top toolbar.

	Work C	Order T	racking					Bulletins: (0)	<u>R</u> eports	
All Records	▼ Find	Work Order	r (🕹 🔹 Select	Action	• 🔁 🗟	24	•	+	
List View	Nork Order	Plans	WO Details	Assignments	Failure Reporting	Related Records	Actuals	Safety Plan	Log	Deficiencie
	Class: Work Order: Cost Center:	WORKOF 37558903 00018768	RDEF 8 * Ri 801 Q, MOR	&R Roof Blowoff @ NROE SH		Restrooms.	ļ	Parent WO * Work Type * WO Priority	CM	>> 0

A Change Status window will appear. Select Field Complete (FCOMP) from the New Status dropdown menu and click on the OK button.

Work Order:	37558903	R&R Roof Blowoff @Football field Visit	tor Restrooms.		
Status	WPLAN	Waiting on Planning (WPLAN)			
		+ New Status	Field Complete (FCOMP)		
		Status Date	9/10/24 11:39 AM	103	
		Reason			
		Reference WO#	a,		
		Memo			
rint or Email Wor	k Order Report v	hen change status in background selected?			
		Change work order status in back ground?			
	Notifi	ation E-mail for Work Order Change Status	jennifer left@lausd net		

25. SUB LABOR GROUP(S) RETURNS THE COMPLETED JOB PACKAGES TO THE LEAD LABOR GROUP. LEAD LABOR GROUP PROCESS ALL PAPERWORK AND CHANGE WORK ORDER STATUS TO WAITING ON INSPECTION (WINSP) AND RETURN PACKAGE TO CPM





The Lead Labor Group performs these functions.

Review completed job packages, process all paperwork (purchase orders, invoices, etc...).

Change work order status to Waiting for Inspection (WINSP)

Click or	the Ch	nange	e Sta	atus 🚏	icon in the	top tool	bar.			
A E	Work C	Order Tr	ackin					galletina (0)		
All Records	* Find	Work Order		Q 🔹 Sele	ct Action	<mark></mark> O	∠∠	\$ \$ ¥	•	
List View	Work Order	Plans	WO De	tails Assignments	Failure Reporting	Related Record	s Actuals	Safety Plan	Log	Deficiencies
	Class	WORKOR	DEF					Parent WO		>>
	Work Order:	37558903	1	R&R Roof Blowof	@Football field Visitor I	Restrooms	(III)	* Work Type	CM	
	* Cost Center:	00018768	01 🔍	MONROE SH				* WO Priority		1 0

A **Change Status** window will appear. Select **Waiting for Inspection (WINSP)** from the New Status dropdown menu and click on the **OK** button.

hange Status					
Work Order:	37558903	R&R Roof Blowoff @Football field Visit	or Restrooms.	Ļ	
Status:	WPLAN	Waiting on Planning (WPLAN)			
		New Status:	Waiting on Inspection (W	(INSP)	
		Status Date:	9/10/24 11:42 AM	10	
		Reference WO#	Q		
		Memo:			
rint or Email Wor	k Order Report v	when change status in background selected?			
		Change work order status in back ground?			
	Notific	cation E-mail for Work Order Change Status:	jennifer leff@lausd.net		-
					ок

Route completed job packages to the CPM.

26. CPM VERIFIES THE JOB IS COMPLETE AND CHANGE THE WORK ORDER STATUS TO COMPLETE (COMP)

The CPM or Designee performs these functions.

Verify job is complete.

Change work order status to Complete (COMP)

Click on the Change Status 😵 icon in the top toolbar.







A **Change Status** window will appear. Select **Complete (COMP)** from the New Status dropdown menu and click on the **OK** button.

Work Order	37558903	R&R Roof Blowoff @Football field Visitor Restrooms. Wating on Planning (WPLAN)		5.			
Status:	WPLAN						
		+ New Status:	Completed (COMP)		-		
		Status Date:	9/10/24 11 42 AM	13			
		Reason			w		
		Reference WOW	Q,				
		Memo					
rint or Email Wor	k Order Report v	hen change status in background selected?					
		Change work order status in back ground?					
	Notifi	ation E-mail for Work Order Change Status	jennifer.left@lausd.n	et			

Route Job Package to Clerical Department for filing. The file retention for a Planned Job should be 5 years. If the Planned Job is for a construction project, the file retention should be 10 years.

Maximo will verify that there are no pending transactions. If there are none, the system will move the work order status to **CLOSE**. If any open transactions exist, the system will change the status to **COMPRJCT**. The error message will identify the open transaction/s. When the transaction/s are closed, the system will move work order to the **CLOSE** status

Should you have any questions on the guide, please contact the Maximo Team at Maximo Team@laschools.net.



