



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



Maximo 7.6 / 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.

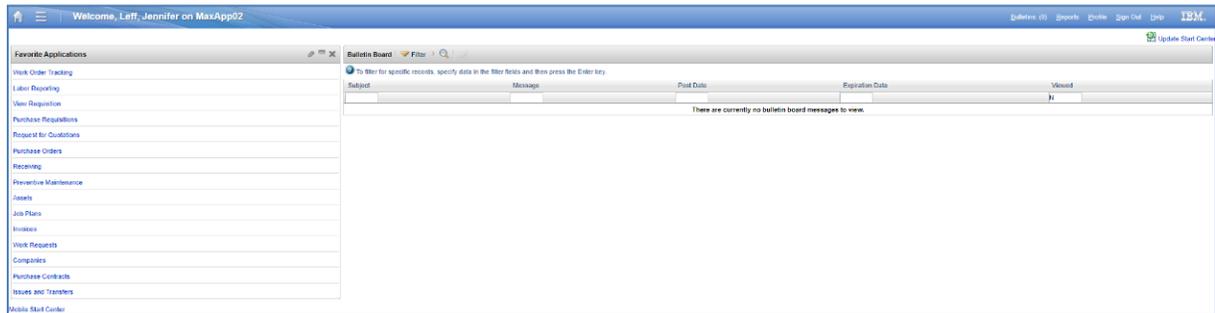
To login to Maximo 7.6, please go to <http://awms.lausd.net/maximo>. Enter your **Single sign-on** username and password and click on the **Sign In** button.





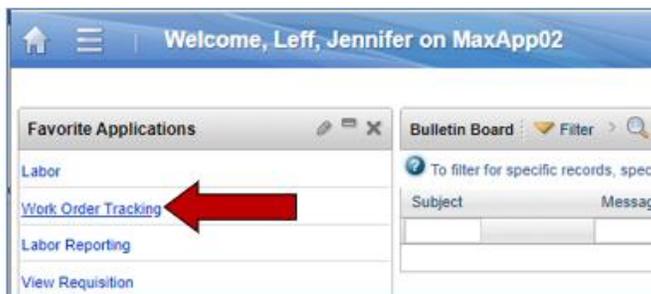
START CENTER

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

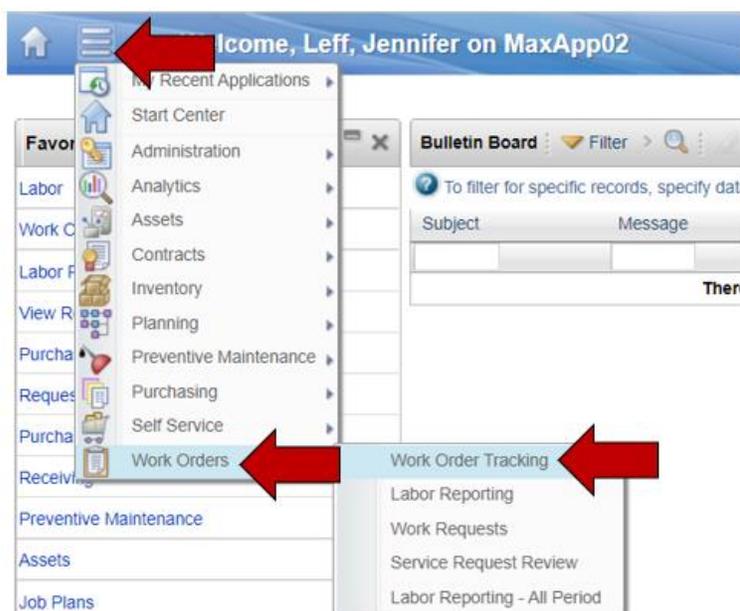


WORK ORDER TRACKING

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



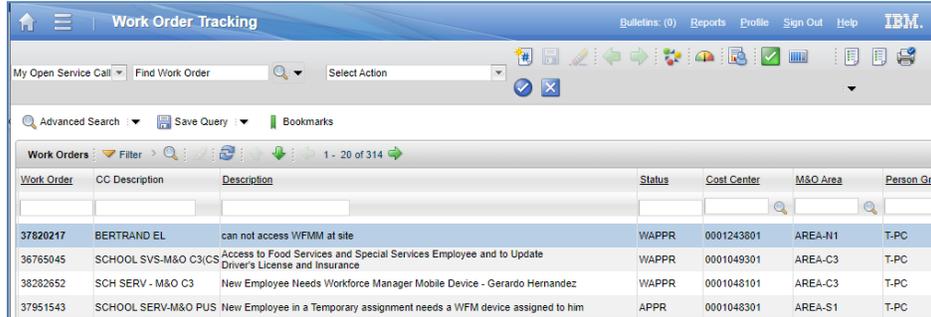
If the application is not saved in your **Favorite Applications**, you can access the application by clicking on the hamburger menu, , selecting **Work Orders**, then selecting **Work Order Tracking**.





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.

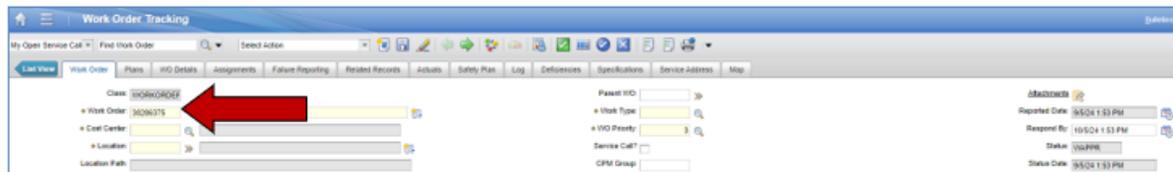


4. NEW WORK ORDER

To initiate a new work order, click on the  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.



Populate the following fields:

General Work Order Information

Work Description	Requestor Name
Cost Center	Requestor Title
Location	Work Type
Job Type	WO Priority
Program	Tracking Code

Scheduling Information

Target / Planning Start
Target / Planning Finish
Scheduled Const. Start
Scheduled Const. Finish
Close Out Start
Close Out Finish

Responsibility

Category Code
Routing Code

Field Breakdown

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



Cost Center

The **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  icon to the right of the **Cost Center** field.

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

* 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.

Select Value

Org Code	Cost Center	Description	Addr_1	City	Zip
9650					
1240	0001124001	ESC-REG E/F-SAAS			
1242	0001124201	SPEC PROJ DROPOUT PR			
1243	0001124301	DIAG LRNG CTR-AREAS			
1244	0001124401	VOC TRG CTR-HDC-GR A			

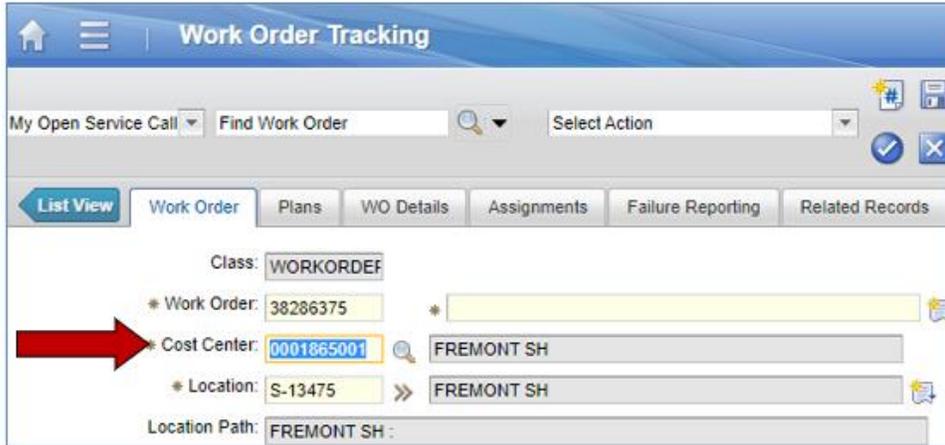
Select the appropriate Cost Center by clicking on the Cost Center value.

Select Value

Org Code	Cost Center	Description	Addr_1	City	Zip
9650					
8650	0001865001	FREMONT SH	7676 S SAN PEDRO ST	LOS ANGELES, CA	90003

Cancel

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



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

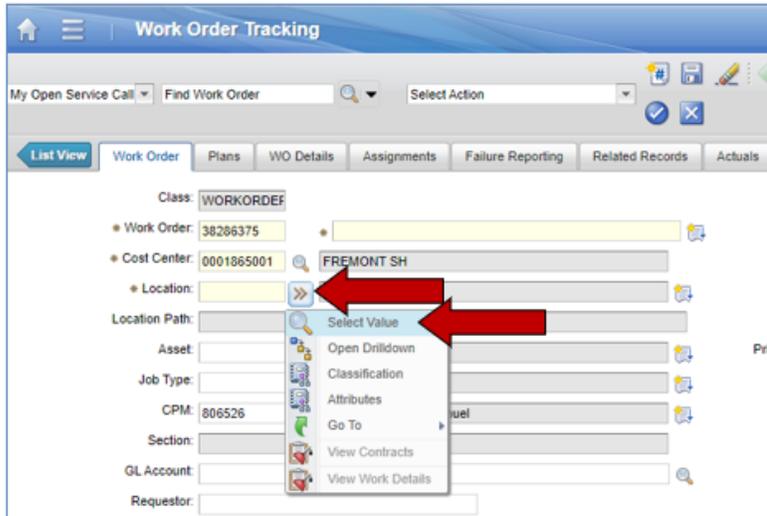
Level 1: **Supersite (S-XXXXX)** – The “Supersite” represents the District property line the cost center inhabits. District property lines are defined by the LA County Assessor’s office. The name of the supersite is typically the same name as the dominant/largest school (cost center) within the property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

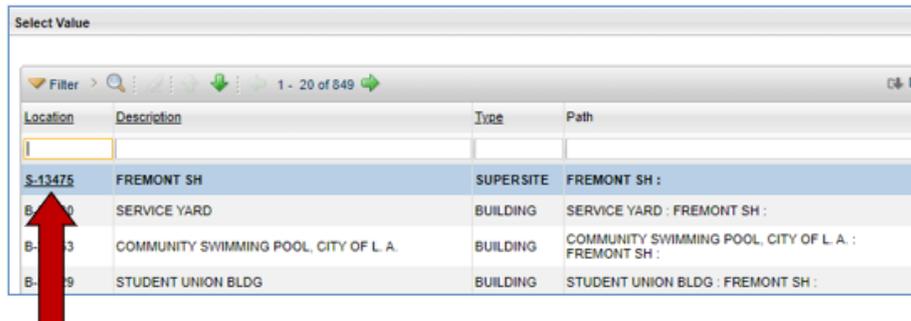
***Note:** There are no longer “Site” level locations in Maximo 7.6. The “Site” level equivalent is now the called the “Supersite.” For additional information, please see **Attachment A**.

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

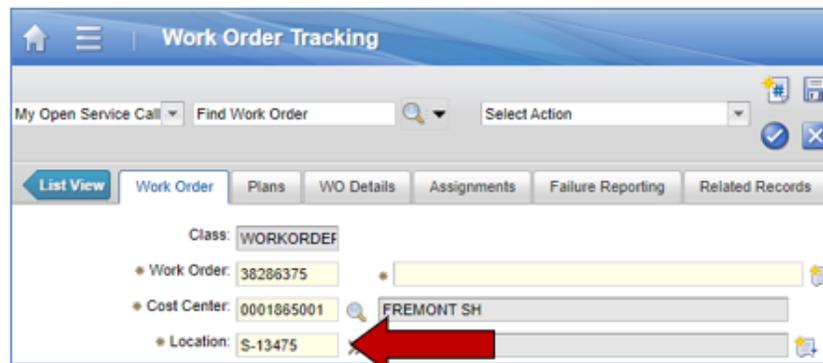


A **Select Value** window appears with a list of locations that are under the cost center you selected earlier. Select the appropriate location by clicking on the location value (e.g. S-13475).

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



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





Job Type Select Job Type **99 (Planned Job)**

Job Type:  

Select Value

Filter > 1 - 1 of 1 Download

Job Cat Code	Description	Mocat
99		
99	Planned Job	PROJ

Cancel

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.

* Work Type:  

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

Select Value

Filter > 1 - 14 of 14 Download

Type	Description	Organization
AD	Administrative Work	LAUSDORG
AI	Alterations and Improvements	LAUSDORG
CM	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  icon. If the work order is an assist ticket, please select AT.

Tracking Code:  

Select Value

Filter > 1 - 20 of 25 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):

Potential Warranty?

Category Code:  

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

Select Value

Filter >     1 - 1 of 1  Download

Category	Category Code
<input type="text"/>	planned
BUNCREW	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.

Select Value

Filter >     1 - 3 of 3  Download

Category	Routing Code
<input type="text"/>	<input type="text"/>
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  next to each field of when the phases of work are expected to begin / finish.

Start	Finish
Target / Planning Start: <input type="text"/> 	Target / Planning Finish: <input type="text"/> 
Scheduled Const. Start: <input type="text"/> 	Scheduled Const. Finish: <input type="text"/> 
Const. Actual Start: <input type="text"/> 	Const. Actual Finish: <input type="text"/> 
Close Out Start: <input type="text"/> 	Close Out Finish: <input type="text"/> 
Start No Earlier Than: <input type="text"/> 	Finish No Later Than: <input type="text"/> 

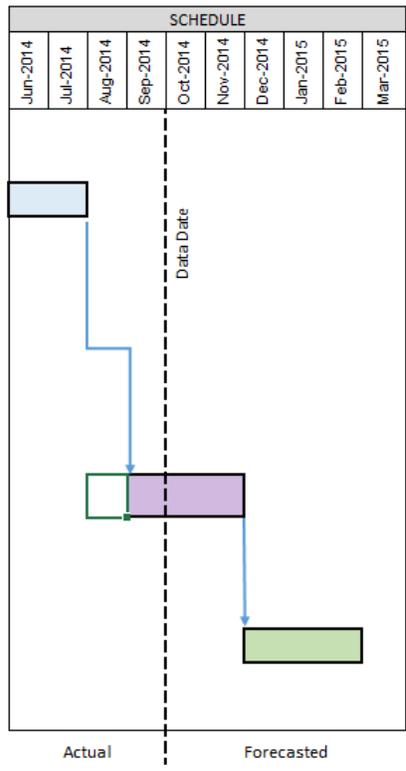
Fields		Definition
Target / Planning Start	Target / Planning Finish	Start and end of Planning
Scheduled Const. Start	Scheduled Const. Finish	Scheduled start and end of construction
Const. Actual Start	Const. Actual Finish	Actual dates for the start and end of construction
Close Out Start	Close Out Finish	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
PLANNING	INPLAN	START
	WREVIEW	↓
	REVIEW	↓
	PFUND	FINISH
FUNDING	INTREADY	START
	INTSESSION	↓
	INTCOMP	↓
	FUNDED	FINISH
PRE-CONSTRUCTION	SCH	
	WMATL	
CONSTRUCTION	INPRG	START
	FCOMP	FINISH
CLOSEOUT	FCOMP	START
	WINSP	↓
	PCOMP	↓
	REWORK	↓
	COMP	FINISH





Maximo 7.6 / M&O Planned Job (Type 99) Guide



Sample screen shot of work order entry:

The screenshot displays the 'Work Order Tracking' interface. The top navigation bar includes 'List View', 'Work Order', 'Plans', 'WO Details', 'Assignments', 'Failure Reporting', 'Related Records', 'Actuals', 'Safety Plan', 'Log', 'Deficiencies', 'Specifications', 'Service Address', and 'Map'. The main area is divided into several sections:

- Class:** WORKORDEF
- Work Order:** 38286375
- Cost Center:** 0001865001
- Location:** S-13475
- Location Path:** FREMONT SH
- Asset:** [Empty]
- Job Type:** 99
- CPM:** 808526
- Section:** [Empty]
- GL Account:** [Empty]
- Requestor:** [Empty]
- Req. Title:** [Empty]
- Change Status on Child WO's?**
- Is Task?**
- Parent WO:** [Empty]
- Work Type:** AD
- WO Priority:** 3
- Service Call?**
- CPM Group:** [Empty]
- Priority Justification:** [Empty]
- Phone:** 323-758-4141
- Cafeteria Phone:** 323-565-1240
- Complex Name:** FREMONT SH
- Fund Source:** [Empty]
- Attachments:** [Icon]
- Reported Date:** 9/5/24 1:53 PM
- Respond By:** 10/5/24 1:53 PM
- Status:** WAPPR
- Status Date:** 9/5/24 1:53 PM
- Agency:** [Empty]
- Agency Date:** [Empty]
- Agency ID:** [Empty]
- Source ID:** [Empty]
- Tracking Code:** AT
- M&O Area:** AREA-S1
- Local Dist:** SOUTH
- Planning Priority:** [Empty]
- IFS Job No.:** [Empty]

Scheduling Information:

- Start:** Target / Planning Start, Scheduled Const. Start, Const. Actual Start, Close Out Start, Start No Earlier Than, Duration: 2.00, Time Remaining, Activity Type.
- Finish:** Target / Planning Finish, Scheduled Const. Finish, Const. Actual Finish, Close Out Finish, Finish No Later Than, Predecessors, Include Tasks in Schedule?, Work Group.

Responsibility:

- Site Based (Y/N):** N
- Potential Warranty?**
- Category Code:** BUNGCREW
- Routing Code:** MO-BM-PL
- Supv / OT Contact:** [Empty]
- Lead:** 600987
- Person Group:** BUNGALOW
- Lead Craft:** BM
- Interruptible shift:**
- Is Milestone?**

Verify that all the information is complete. To save the record, click on the  icon, located on the top toolbar.

This screenshot shows the top toolbar of the 'Work Order Tracking' interface. A red arrow points to the save icon (a floppy disk) among other icons like 'Find', 'Select Action', and 'Print'.

A "Record has been saved" message will appear.

This screenshot shows the 'Work Order Tracking' interface with a red arrow pointing to a message at the top: '8MXAA42991 - Record has been saved.' The work order details below show 'Work Order: 38286375' and 'Work Type: CM'.

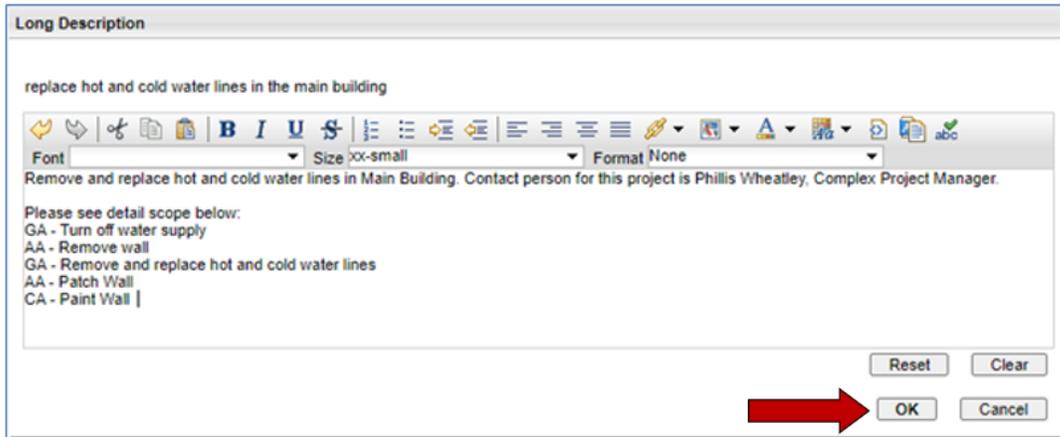
5. DEFINE SCOPE OF WORK AND ATTACH DOCUMENTS (OPTIONAL)

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.



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.

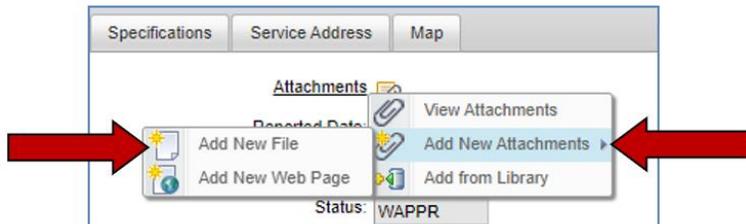


Attach Documents, Photos, Drawings (Optional)

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



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**.



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: Choose Files | No file chosen

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?

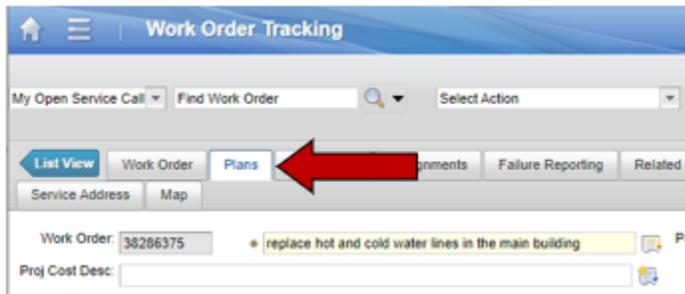
Print attached document with report if printable type?

OK Cancel

6. PRE-PLAN TASKS/LABOR

The CPM or Designee performs this function.

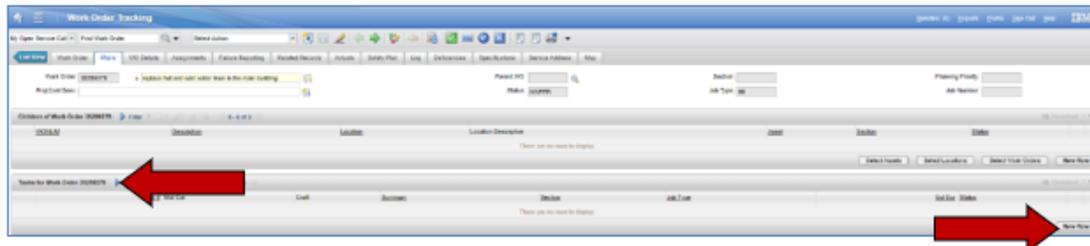
Click on the **Plans** tab.



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.



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.



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

Sample screen shot:

Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur
10			PP-AA		99	60:00
20			PP-AA		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.



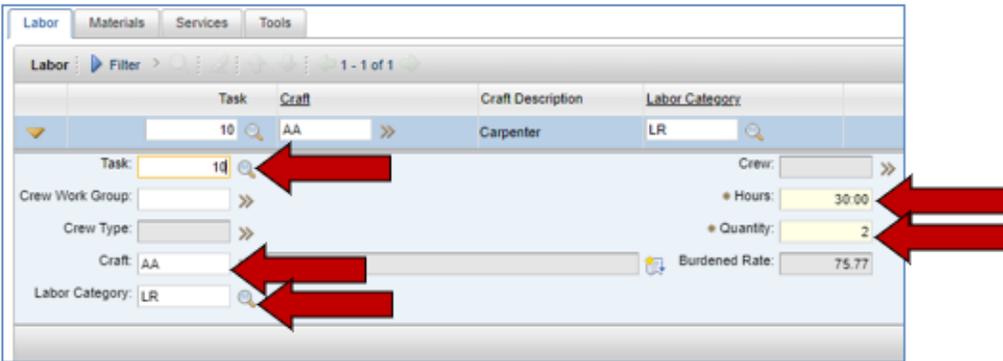
Task ID: Enter the Task you are estimating the labor for (e.g. Task ID 10).

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.

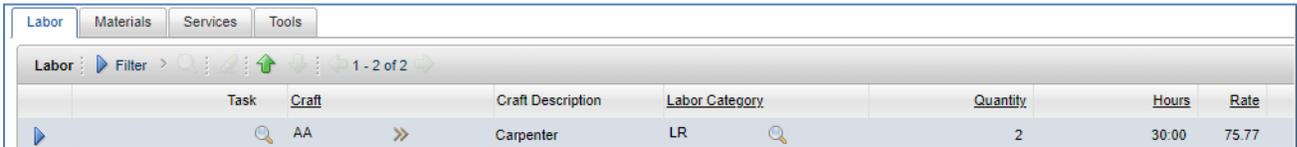
Labor Cat: The system defaults LR (Labor Regular), but can be changed to LO (Labor Overtime) if applicable.

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

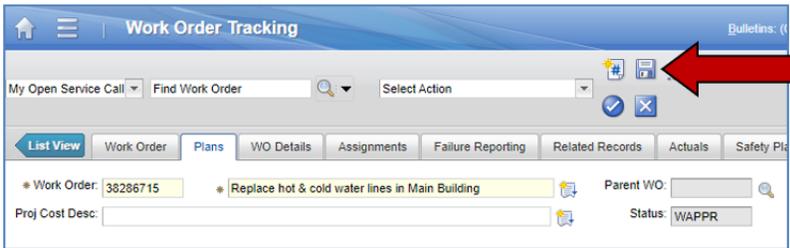


Click on the **New Row** button to repeat steps for the next task.

Sample screen shot:



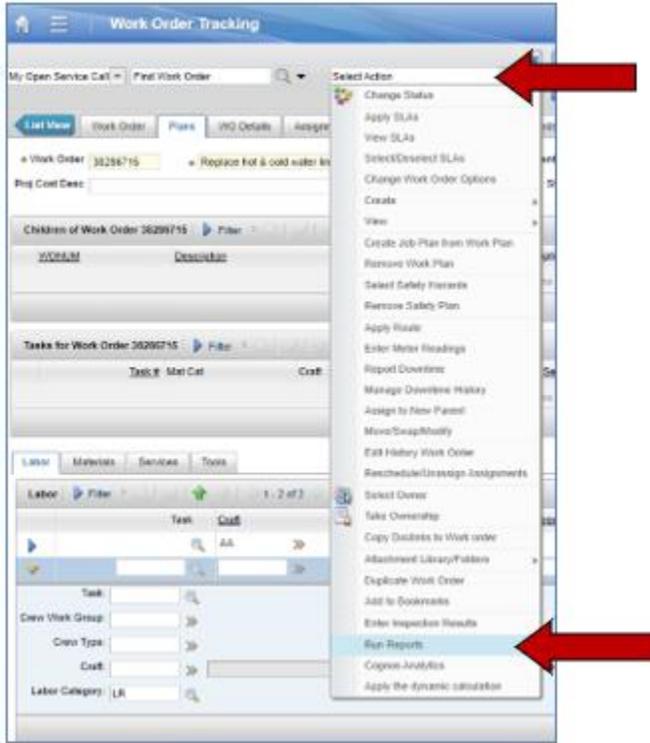
Click on the  icon to save when finish.



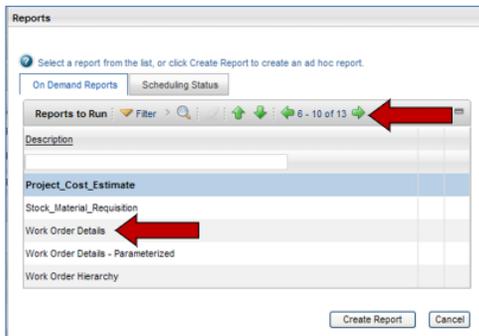
7. PRINT/SUBMIT WORK ORDER DETAILS REPORT FOR PLANNING APPROVAL

The CPM or Designee performs this function.

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



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



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



Request Page

Help Text

Parameters

Schedule

Immediate
 At this Time
 Recurring

Email

To:

Subject:

Comments:

File Type: PDF XLS

Report Delivery Format: Email with a file attachment Email with a file URL

Submit

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

Page 1 of 1

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

WORK ORDER DETAILS REPORT

W.O. # *36765045* Access to Food Services and Special Services Employee and to Update Driver's License and Insurance
Job #:

Requester Name:	Requester Title:	Chief Clerk	Requested Date:
Dorina Ramirez		main	5/11/18
Requested By Date:	Status:	W.O. Priority:	
6/20/18		3	
Work Type:	Parent W.O. #:	Agency Name:	Agency Date:
CH			

Comments
Sherril Miller 6/12/2018 Principal Clerk for Special Services and Food Services requests access to both Cash Centers/Locations does not have access to Driver License and Insurance Information Screen.

Location Details	Address:
0001049301 SCHOOL SVS-M&O C3(CS)	1240 S HAZEN ST, LOS ANGELES 90021
Local M&O Dept:	Site Phone:
0400-C3	313 745-1400
Local M&O Complex:	CPM Phone:
	313 745-1586
CPM:	Cafeteria Phone:
Servis. Hours:	
Org Code (S.S.):	
0493	
Location Path:	CAMN Sch Bus #:
0-13902 - H & O AREA C3	

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.

Start	Finish
Target / Planning Start: 10/5/17 12:00 AM	Target / Planning Finish: 11/4/17 12:00 AM
Scheduled Const. Start: 11/5/17 12:00 AM	Scheduled Const. Finish: 12/5/17 12:00 AM
Const. Actual Start: []	Const. Actual Finish: []
Close Out Start: 12/6/17 12:00 AM	Close Out Finish: 12/12/17 12:00 AM
Start No Earlier Than: []	Finish No Later Than: []

Change the status to Waiting on Planning (WPLAN)

Click on the Change Status  icon in the top toolbar.

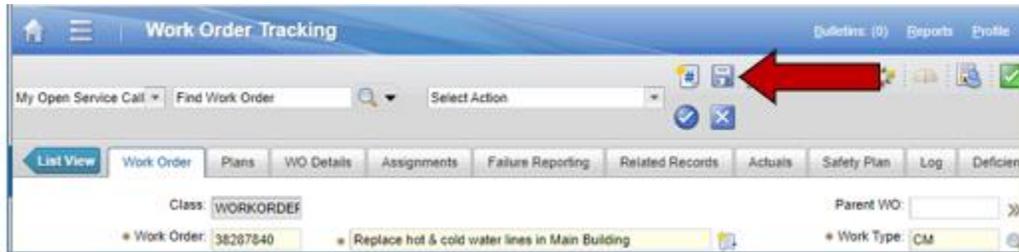
A **Change Status** window will appear. Select **Waiting on Planning (WPLAN)** from the New Status dropdown menu and click on the **OK** button.

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.



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

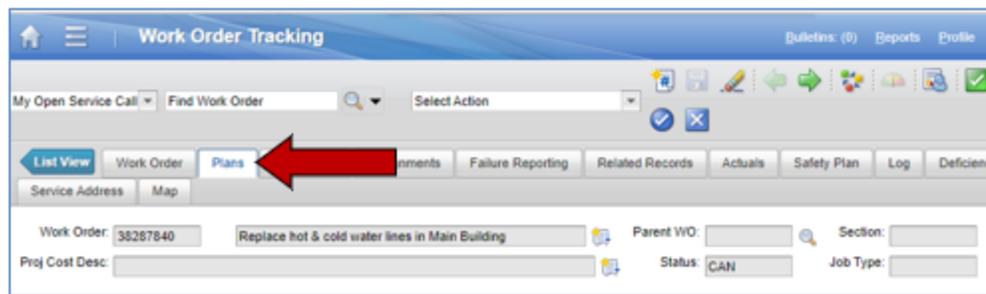


Route/Inform the Lead Craft about the Planned Job and the need for planning.

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.



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.

Sequence	Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur	Status
10	AA			PP-AA	1431	99	60.00	WAPPR
20	GA			PP-GA	1431	99	240.00	WAPPR
30	CA			PP-CA	1431	99	40.00	WAPPR

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	2	240.00	64.90	31,152.00
30	CA	Painter	LR	1	40.00	54.57	2,182.80

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.

Sequence	Task #	Mat Cat	Craft	Summary	Section	Job Type	Est Dur
10	AA			AA- Remove 5x7 wall to expose hot and cold water lines	1431	99	60.00
20	GA			GA- Remove and replace hot and cold water lines	1431	99	240.00
30	AA			AA- Patch wall	1431	99	40.00
40	CA			CA- Paint wall to match existing color	1431	99	2.00



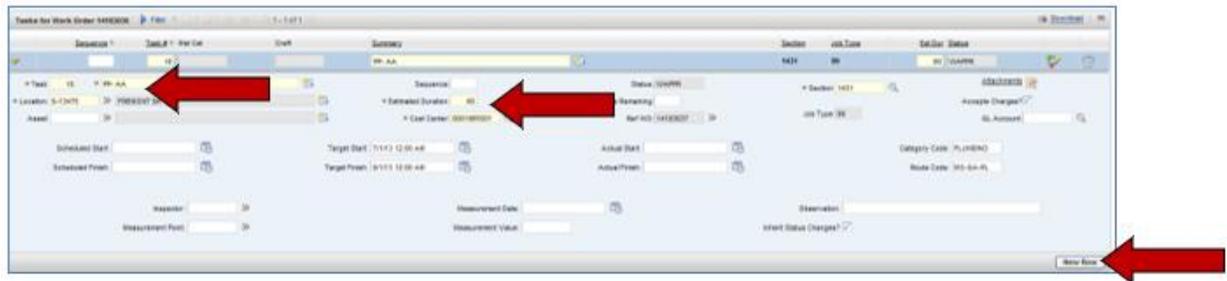
New Task

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.



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

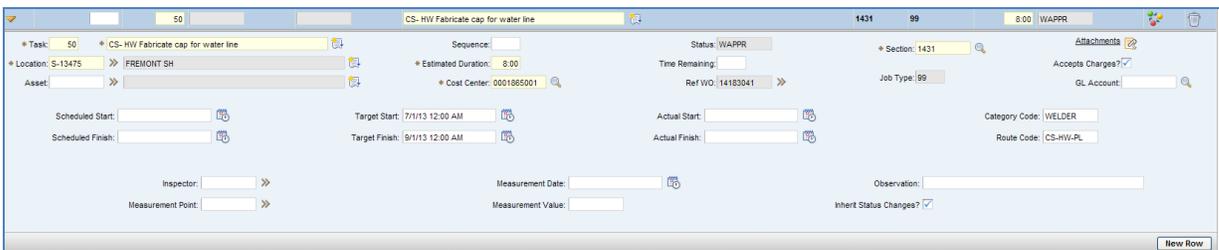
Central Shops as support (if applicable)

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)



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.



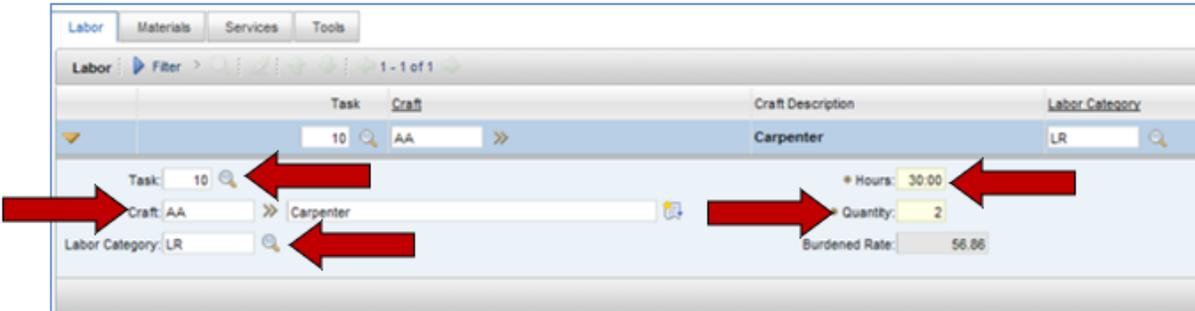
Task ID: Enter the Task you are estimating the labor for (e.g. Task ID 10).

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).

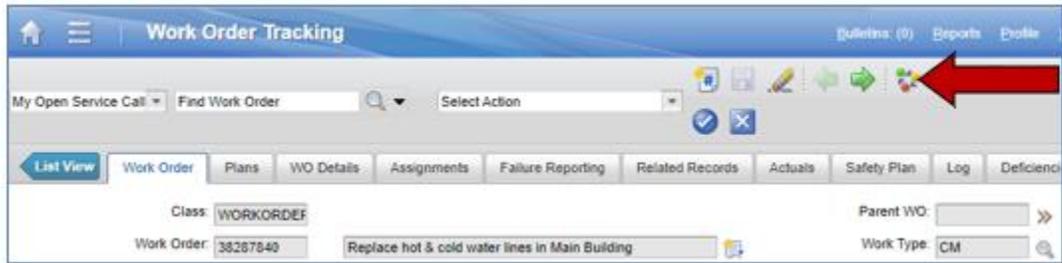


Click on the **New Row** button to repeat steps for the next task.

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.



A **Change Status** window will appear. Select **In Planning (INPLAN)** 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

Status: WAPPR Waiting on approval

New Status: In Planning (INPLAN) ←

Status Date: 9/6/24 8:01 AM

Reason: [Dropdown]

Reference WO#: [Search]

Memo: [Text]

Print or Email Work Order Report when change status in background selected?

Change work order status in back ground?

Notification E-mail for Work Order Change Status: jennifer.leff@lausd.net

OK ←

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).

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

Summary	Section	Job Type	Est Dur	Status
AA- Remove 5x7 wall to expose hot and cold water lines.	1431	99	60.00	INPLAN
GA- Remove and replace hot and cold water lines.	1431	99	240.00	INPLAN
AA- Patch wall	1431	99	40.00	INPLAN
CA- Paint wall to match existing color	1431	99	2.00	INPLAN
CS- HW Fabricate cap for water line	1431	99	8.00	INPLAN
EA - Test interior electrical outlets	1431	99	2.00	WAPPR

A **Change Status** window will appear. Select **Waiting on Review (WREVIEW)** 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

Status: WAPPR Waiting on approval

New Status: Waiting on Review (WREVIEW) ←

Status Date: 9/6/24 8:01 AM

Reason: [Dropdown]

Reference WO#: [Search]

Memo: [Text]

Print or Email Work Order Report when change status in background selected?

Change work order status in back ground?

Notification E-mail for Work Order Change Status: jennifer.leff@lausd.net

OK ←

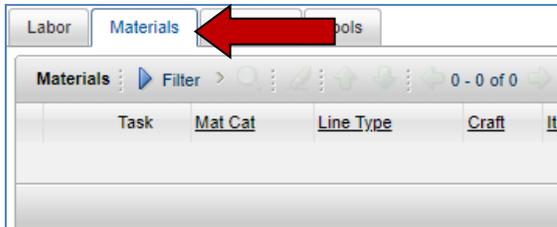


Repeat status change steps for all sub labor group task lines.

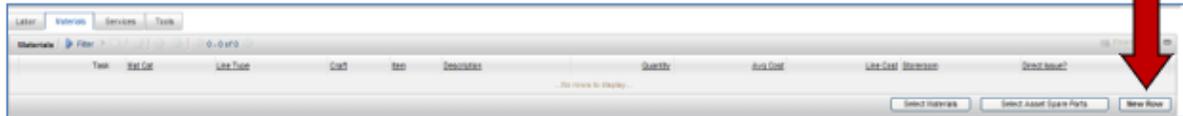
12. CREATE MATERIAL ESTIMATES

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

To create Material estimates, click on the Materials tab.

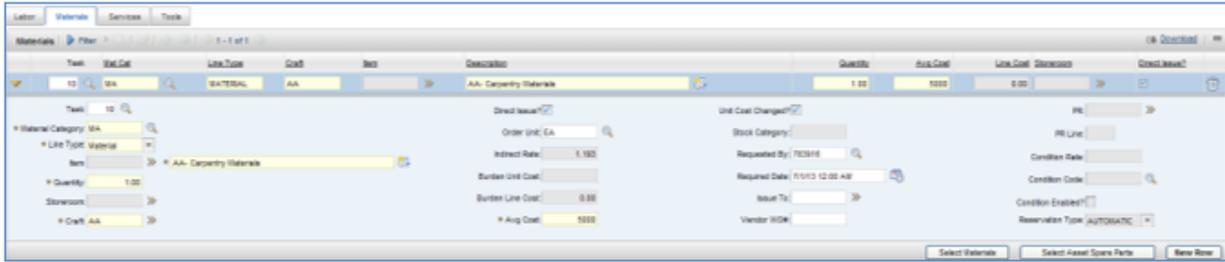


Click on the **New Row** button to create a new Material estimate line.



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 next field.
- Order Unit** Enter **EA** for each.
- Avg Cost** Enter the Total Estimated **Cost** of Materials for the corresponding Task Line.



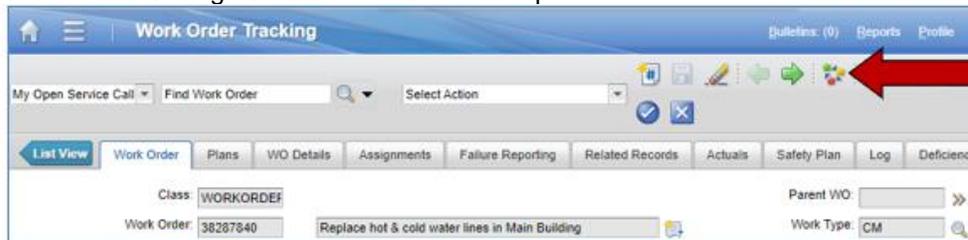
Click on **New Row** to add additional planned Material cost. When complete, Click on the  icon to save.

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

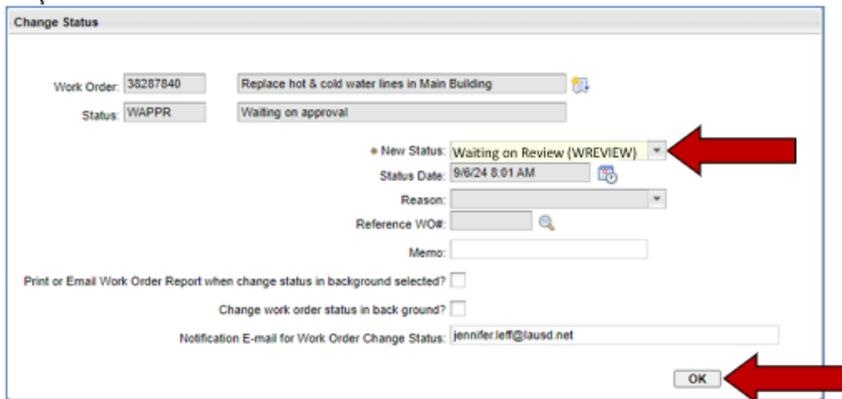
The Lead Planner or Designee performs these functions.

Change work order order status to Waiting on Review (WREVIEW)

Click on the Change Status  icon in the top toolbar.

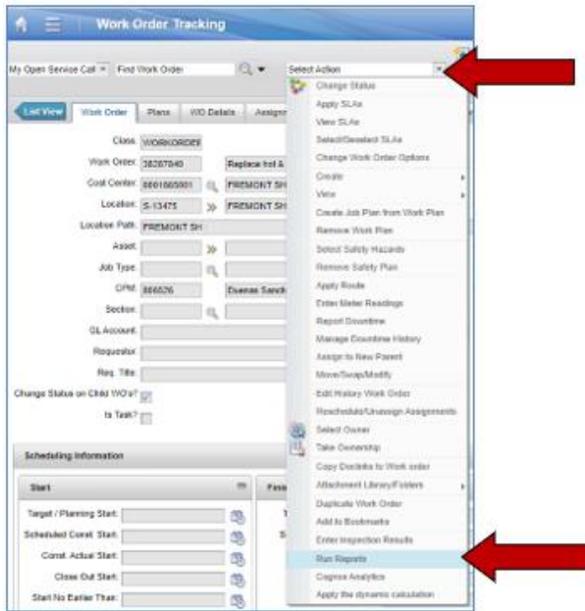


A **Change Status** window will appear. Select **Waiting on Review (WREVIEW)** from the New Status dropdown menu and click on the **OK** button.

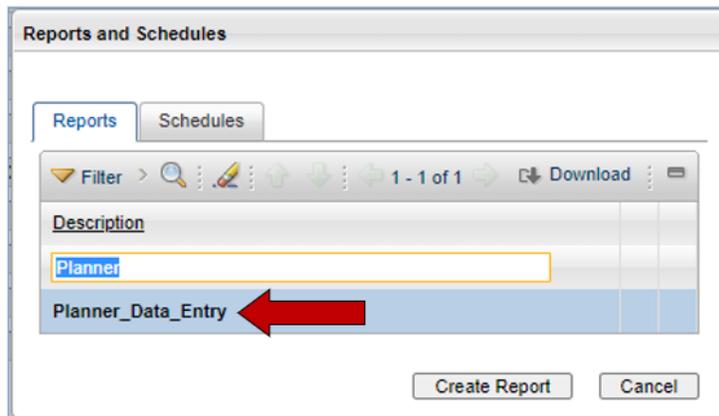


Print Planner Data Entry Report

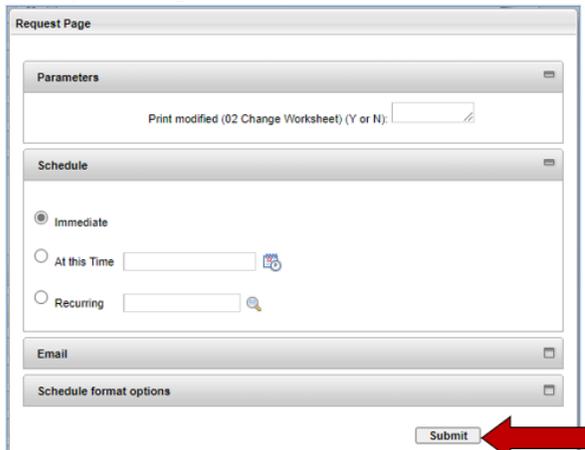
To print the Planner Data Entry report, on the work order, click on the **Select Action** dropdown  icon and select **Run Reports**.



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

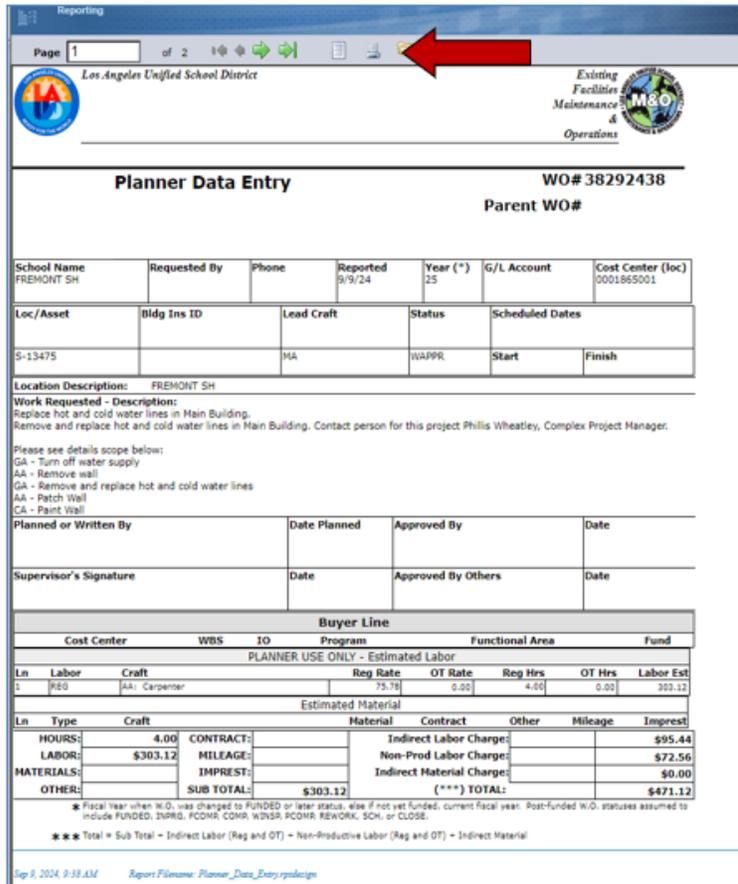


A **Request Page** will appear. Click on the **Submit** button.





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



Reporting

Page 1 of 2

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Planner Data Entry WO# 38292438
Parent WO#

School Name FREMONT SH	Requested By	Phone	Reported 9/9/24	Year (*) 25	G/L Account	Cost Center (loc) 0001865001
Loc/Asset S-13475	Bldg Ins ID	Lead Craft NA	Status WAPPR	Scheduled Dates Start Finish		

Location Description: FREMONT SH

Work Requested - Description:
Replace hot and cold water lines in Main Building.
Remove and replace hot and cold water lines in Main Building. Contact person for this project Phillis Wheatley, Complex Project Manager.

Please see details 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

Planned or Written By	Date Planned	Approved By	Date
Supervisor's Signature	Date	Approved By Others	Date

Cost Center	WBS	IO	Program	Functional Area	Fund		
PLANNER USE ONLY - Estimated Labor							
Ln	Labor	Craft	Reg Rate	OT Rate	Reg Hrs	OT Hrs	Labor Est
1	RES	AA - Carpenter	75.78	0.00	4.00	0.00	303.12
Estimated Material							
Ln	Type	Craft	Material	Contract	Other	Mileage	Imprest
HOURS:		4.00	CONTRACT:		Indirect Labor Charge:		\$95.44
LABOR:		\$303.12	MILEAGE:		Non-Prod Labor Charge:		\$72.56
MATERIALS:			IMPREST:		Indirect Material Charge:		\$0.00
OTHER:			SUB TOTAL:	\$303.12	(***) TOTAL:		\$471.12

*** Total = Sub Total + Indirect Labor (Reg and OT) + Non-Productive Labor (Reg and OT) + Indirect Material

Report File Name: Planner_Data_Entry.rptdesign

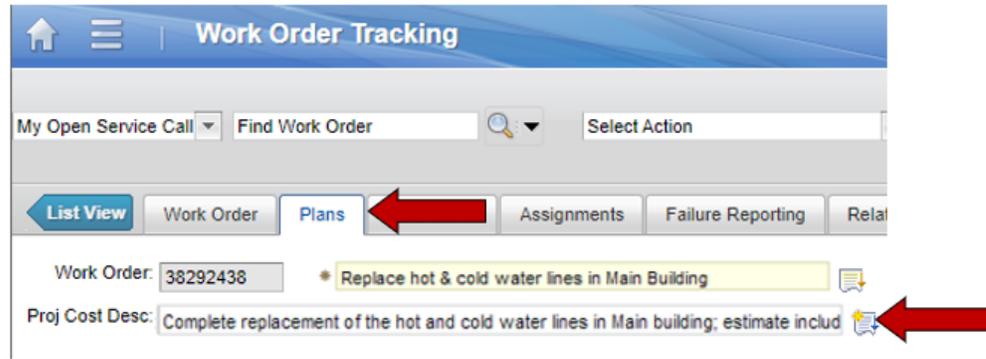
Submit the report to the CPM or Designee for review and approval.

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.

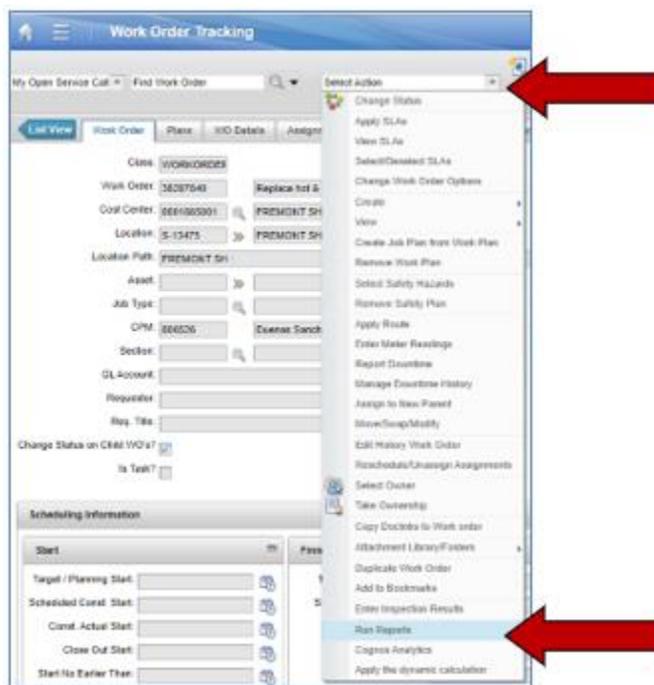
Review the Planner Data Entry. If approve, print the **Project Cost Estimate** report and submit to requestor for funding line. If you do not approve of the estimate, return Planner Data Entry form back to lead craft for adjustments.

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.

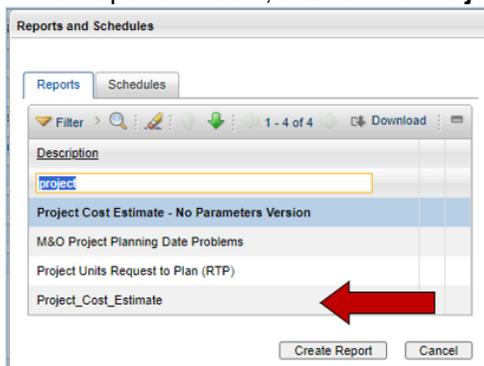


Project Cost Estimate Report

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



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





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

The screenshot shows a web form titled "Request Page" with several sections:

- Parameters**: Contains a "Print Modified (Y or N):" field and four input fields for "Requestor Name:", "Requestor Title:", "Requestor Phone:", and "Requestor Fax:". Red arrows point to the "Requestor Name" (Jennifer Leff), "Requestor Title" (Admin Analyst), and "Requestor Phone" ((213)-241-3751) fields.
- Schedule**: Contains three radio button options: "Immediate" (selected), "At this Time" (with a calendar icon), and "Recurring" (with a magnifying glass icon).
- Email**: A section with a checkbox.
- Schedule format options**: A section with a checkbox.
- Submit**: A button at the bottom right, with a red arrow pointing to it.

The **Project Cost Estimate** report will appear.



Maximo 7.6 / M&O Planned Job (Type 99) Guide



Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Project Cost Estimate **W.O.# 38292438**

School Name: FREMONT SH Complex Name: FREMONT
 Cost Center: 0001865001
 Requester Name: Jennifer Leff Title: Admin Analyst
 Date of Request: 9/9/24 Date of Estimate: 9/9/24 Phone: (213)-241-3751 FAX:

Description of Work
 Description of the Work (includes items to be provided by school, cost saving alternatives, and impact on school operations): null.

Original Cost: _____
 Additional Funds Needed: _____
Total Cost: \$471.12

- Estimate includes liability, workman's compensation and motor vehicle insurance.
- 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.
- Estimate includes fringe benefits for employees performing the work. All project costs will be charged to the funding line(s) provided by the site administrator.
- Costs, including fringe benefits, may appear several months after project has been completed. This is due to the accounting system currently in place.

School Designated Funding Source

Cost Center (10 digits) or WBS (SAP Project) (10 or 14 digits) and Program (reqd) (Last 5 digits of Functional Area)

Preparer Signature _____ Date _____ Requester Signature _____ Date _____

Estimate valid for 30 days from date of preparer's signature.

Sep 9, 2024, 9:49 AM Report Filename: Project_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.

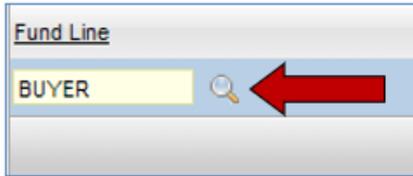


Click on the **New Row** button on the bottom right of the page.





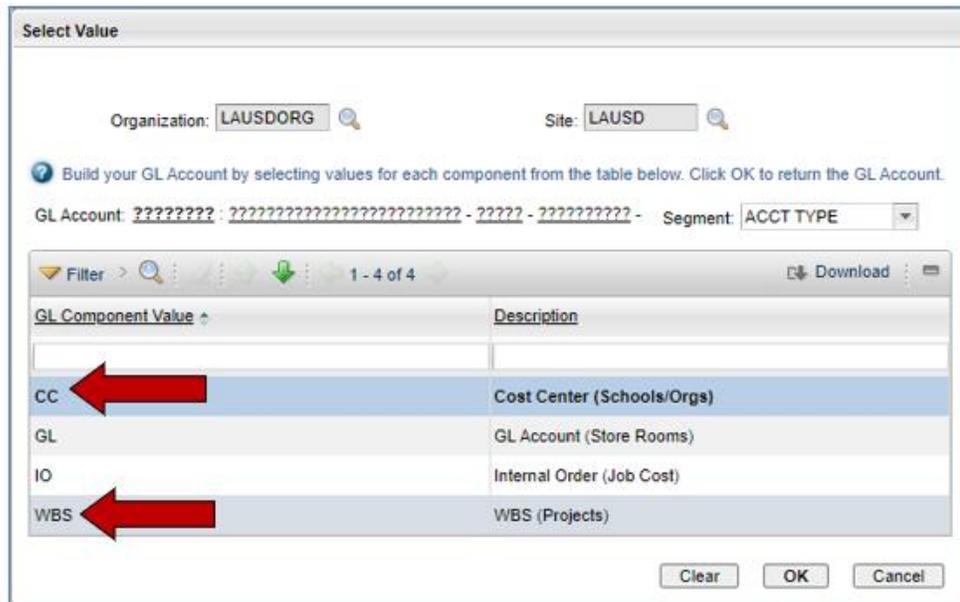
Under the **Fund Line** field, type in the word **BUYER**, you may also use the magnifying glass icon to select the word **BUYER** from the value list.



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



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.



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



Organization: LAUSDORG Site: LAUSD

Build your GL Account by selecting values for each component from the table below. Click OK to return the GL Account.

GL Account: CC: ????????????????????????????????? - ????? - ????????????? - Segment: ACCT VALUE

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 UAll (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 Site: LAUSD

Build your GL Account by selecting values for each component from the table below. Click OK to return the GL Account.

GL Account: CC: ????????????????????????????????? - ????? - ????????????? - Segment: ACCT VALUE

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
0001915401	Fremont-Washington CAS - 9154

Clear OK

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



Maximo 7.6 / M&O Planned Job (Type 99) Guide



Select Value

Organization: LAUSDORG Site: LAUSD

Build your GL Account by selecting values for each component from the table below. Click OK to return the GL Account.

GL Account: CC : 0001865001 - ????? - ?????????? - Segment: PROGRAM

GL Component Value	Description
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

Clear OK

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

Select Value

Organization: LAUSDORG Site: LAUSD

Build your GL Account by selecting values for each component from the table below. Click OK to return the GL Account.

GL Account: CC : 0001865001 - 10048 - ?????????? - Segment: COSTELEMNT

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)
560011	Rental Of Equipment (5604)

Clear OK

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



Buyer Line

CC:0001865001-17398 

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: <input type="text"/>	Const. Actual Finish: <input type="text"/>
Close Out Start: 9/11/24 3:02 PM	Close Out Finish: 12/13/24 3:02 PM
Start No Earlier Than: <input type="text"/>	Finish No Later Than: <input type="text"/>
* Duration: 2:00	
Predecessors: <input type="text"/>	
Time Remaining: <input type="text"/>	
Include Tasks in Schedule? <input checked="" type="checkbox"/>	
Activity Type: <input type="text"/>	
Work Group: <input type="text"/>	

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  icon in the top toolbar.

Work Order Tracking

My Open Service Call Find Work Order Select Action

Class: WORKORDEF Parent WO:

Work Order: 38286375 replace hot and cold water lines in the main building 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.



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.

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

Submit Job Package to Clerical to generate Internal Order.

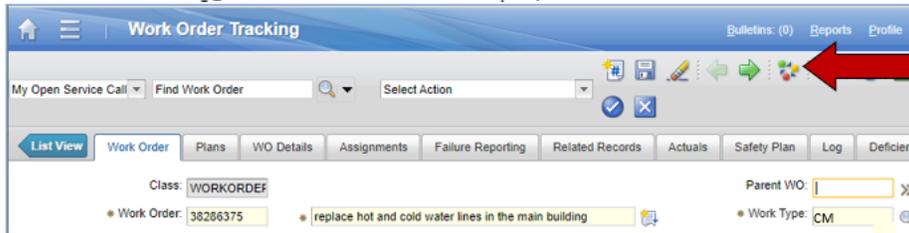


17. CHANGE STATUS TO READY TO INTERFACE (INTREADY) TO GENERATE INTERNAL ORDER

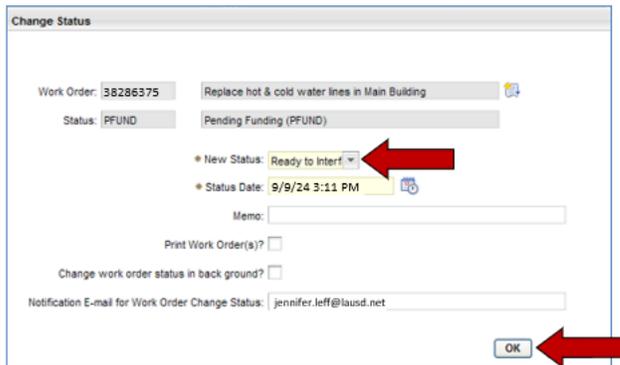
Clerical Department will perform this action

Change work order status to Ready to Interface (INTREADY)

Click on the Change Status  icon in the top toolbar.



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



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:



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

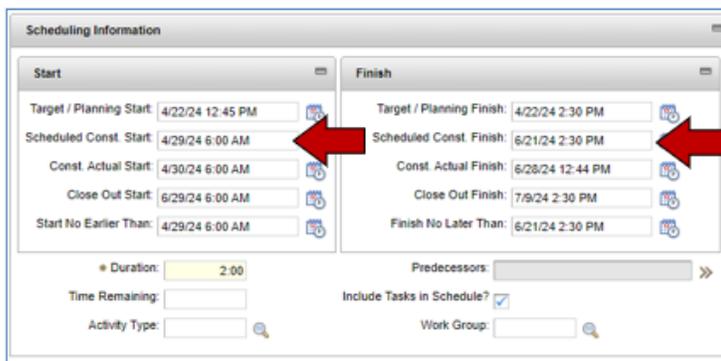
The **CPM** and **Clerical** staff who changed the status of the WO to **Ready to Interface (INTREADY)** will receive an email should the interface Rejects or was Successful. If the **Internal Order (IO) number** was created successfully, the **IO number** will appear on the email.

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.



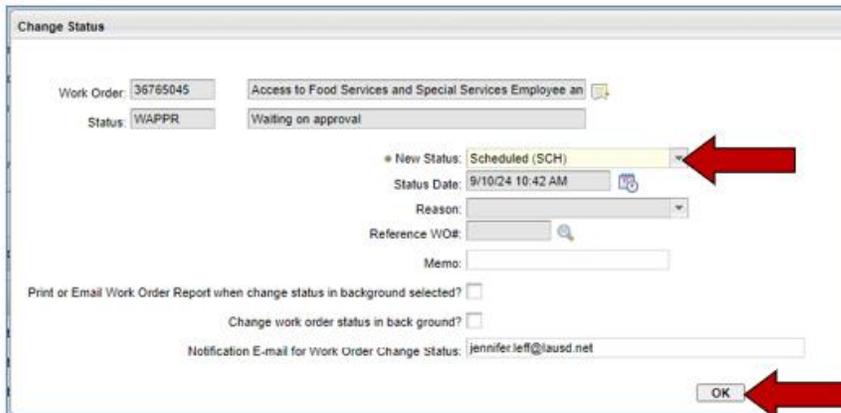


Change work order status to Scheduled (SCH)

Click on the Change Status  icon in the top toolbar.



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

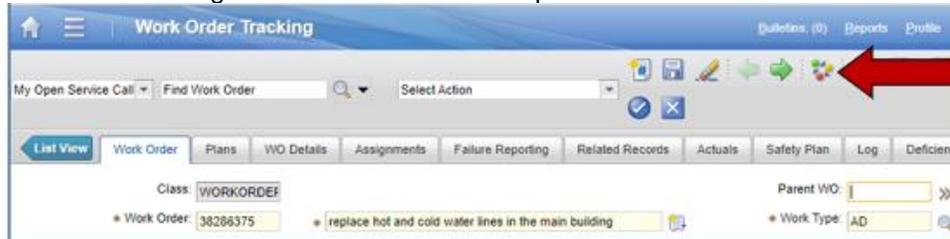


22. WORK COMMENCES, FIRST CRAFT CHANGE STATUS OF THE WORK ORDER TO IN PROGRESS (INPRG)

The First Craft on the Job performs this function.

Change work order status to In Progress (INPRG)

Click on the Change Status  icon in the top toolbar.



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



Change Status

Work Order: 36765045 Access to Food Services and Special Services Employee an

Status: WAPPR Waiting on approval

* New Status: **In progress** ←

Status Date: 9/10/24 10:42 AM

Reason:

Reference WOP:

Memo:

Print or Email Work Order Report when change status in background selected?

Change work order status in back ground?

Notification E-mail for Work Order Change Status: jennifer.lee@lausd.net

OK ←

23. INCREASE / DECREASE PLAN AMOUNT (O2 CHANGE)

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

Work Order Tracking

My Open Service Call: Find Work Order Select Action

List View Work Order **Plans** ← Alerts Failure Reporting Related Records

Service Address Map

Work Order: 36765045 Access to Food Services and Special Services Employee an Parent WO: Status:

Proj Cost Desc:

Children of Work Order 36765045 Filter 0 - 0 of 0

WONUM	Description	Location	Location Description
There are no rows to display			

Tasks for Work Order 36765045 ←

Task #	Mat Cat	Craft	Summary	Section
There are no rows to display				

Labor Materials Services Tools

Labor Filter 0 - 0 of 0

Task	Craft	Craft Description	Labor Category
There are no rows to display			

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...)



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The screenshot shows the 'Tasks for Work Order 36765045' interface. A red arrow points to the task name 'O2 CHANGE - INCREASE LABOR'. Below, the 'Labor' tab is active, showing a table with columns: Task, Craft, Craft Description, Labor Category, Quantity, Hours, and Rate. The table contains three rows of labor data for 'Plant Manager I'.

Task	Craft	Craft Description	Labor Category	Quantity	Hours	Rate
PLM1	PLM1	Plant Manager I	LR	1	2.00	54.54
PLM1	PLM1	Plant Manager I	LR	1	1	54.54
			LR	1	2.00	0.00

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**.

The screenshot shows the 'Work Order Tracking' interface. A red arrow points to the 'Select Action' dropdown menu, which is open and shows various options. The 'Run Reports' option is highlighted with another red arrow.

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



Reports and Schedules

Reports Schedules

Filter > 1 - 1 of 1 Download

Description
planner
Planner_Data_Entry

Create Report

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

Request Page

Parameters

Print modified (02 Change Worksheet) (Y or N): Y

Schedule

Immediate

At this Time

Recurring

Email

Schedule format options

Submit



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Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Modified Planner Data Entry WO# 36765045

Parent WO#

School Name	Requested By	Phone	Reported	Year (*)	G/L Account	Cost Center (loc)
SCHOOL SVS-M&O C3(CS)	Dwyna Blackmon		5/31/23	25		0001049301

Loc/Asset	Bldg Ins ID	Lead Craft	Status	Scheduled Dates	
S-13913		MAX	WAPPR	Start	Finish

Location Description: M & O AREA C3

Work Requested - Description:
Access to Food Services and Special Services Employee and to Update Driver's License and Insurance. Sherri Miller EN 671066 Principal Clerk for Special Services and Food Services requires access to both Cost Centers/Locations does not have access to Driver License and Insurance Information Screen.

Planned or Written By	Date Planned	Approved By	Date
Supervisor's Signature	Date	Approved By Others	Date

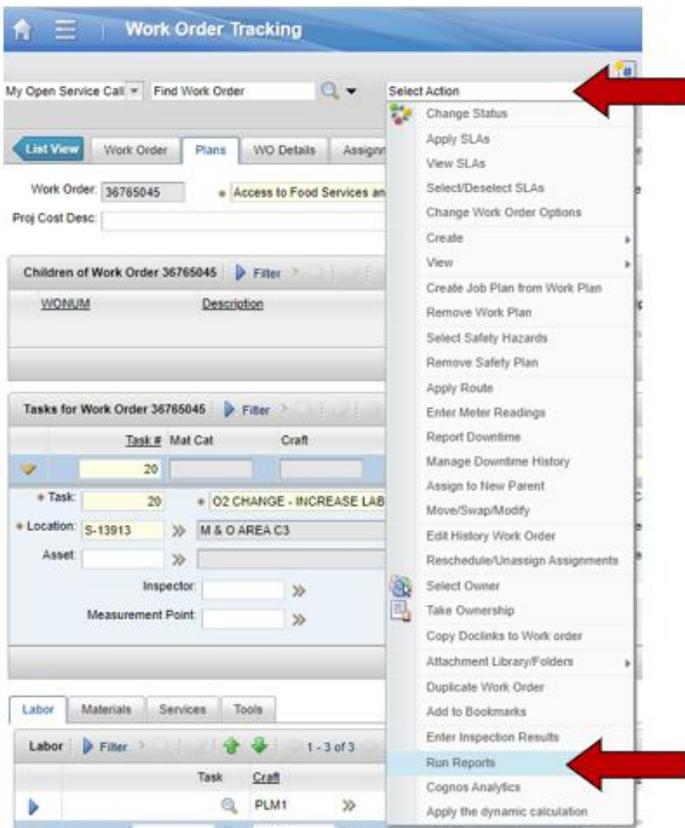
Buyer Line							
Cost Center	WBS	IO	Program	Functional Area	Fund		
PLANNER USE ONLY - Estimated Labor							
Ln	Labor	Craft	Reg Rate	OT Rate	Reg Hrs	OT Hrs	Labor Est
Estimated Material							
Ln	Type	Craft	Material	Contract	Other	Mileage	Imprest
HOURS:		0.00	CONTRACT:		Indirect Labor Charge:		\$0.00
LABOR:			MILEAGE:		Non-Prod Labor Charge:		\$0.00
MATERIALS:			IMPREST:		Indirect Material Charge:		\$0.00
OTHER:			SUB TOTAL:	\$0.00	(***) TOTAL:		\$0.00

* Fiscal Year when W.O. was changed to FUNDED or later status, else if not yet funded, current fiscal year. Post-funded W.O. statuses assumed to include FUNDED, INPRG, FCOMR, COMP, WINSP, PCOMR, REWORK, SCH, or CLOSE.

*** Total = Sub Total + Indirect Labor (Reg and OT) + Non-Productive Labor (Reg and OT) + Indirect Material

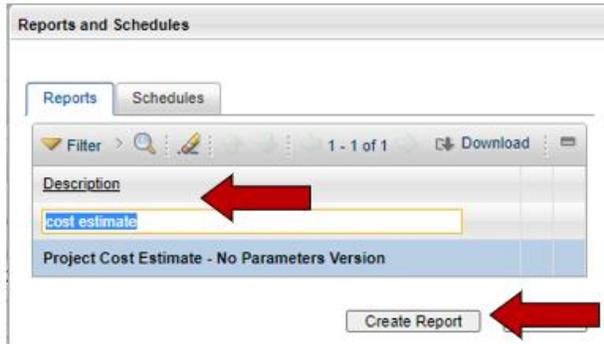
Sep 10, 2024, 11:14 AM Report Filename: Planner_Data_Entry.rptdocign

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





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



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.

Reporting

Page 1 of 1

Los Angeles Unified School District

Existing Facilities Maintenance & Operations

Modified Project Cost Estimate W.O.# 36765045

School Name: SCHOOL SVS-M&O C3(CS) Complex Name:
 Cost Center: 0001049301
 Requester Name: Title:
 Date of Request: 5/31/23 Date of Estimate: 9/10/24 Phone:

Description of Work

Description of Work (includes items to be provided by school, cost saving alternatives, and impact on school operation null.

Original Cost: _____
 Additional Funds Needed: _____
Total Cost: \$10,000,000

- Estimate includes liability, workman's compensation and motor vehicle insurance.
 - All labor is fully warranted
 - Material is factory warranted
 - 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.
 - Estimate includes fringe benefits for employees performing the work. All project costs will be charged to the funding line(s) provided by the site administrator.
 - Costs, including fringe benefits, may appear several months after project has been completed. This is due to the accounting system currently in place.

School Designated Funding Source

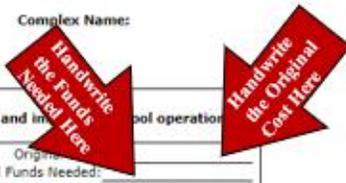
Cost Center or WBS (SAP Project) and Program (reqd)

0001049301 10 digits 10 or 14 digits Last 5 digits of Functional Area

Preparer Signature Date Requester Signature Date

Estimate valid for 30 days from date of preparer's signature.

Sep 10, 2024, 11:15 AM Report Filename: Project_Cost_Estimate.rpt/sign



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	Target / Planning Finish: 5/31/24 7:30 AM
Scheduled Const. Start: 6/3/24 6:00 AM	Scheduled Const. Finish: 6/28/24 2:30 PM
Const. Actual Start: 6/3/24 6:00 AM	Const. Actual Finish: 6/28/24 2:30 PM
Close Out Start:	Close Out Finish:
Start No Earlier Than:	Finish No Later Than:
* Duration: 2:00	
Predecessors:	
Time Remaining:	Include Tasks in Schedule? <input checked="" type="checkbox"/>
Activity Type:	Work Group:

Change work order status to Field Complete (FCOMP)

Click on the Change Status icon in the top toolbar.

The screenshot shows the 'Work Order Tracking' interface. The top toolbar contains several icons, with the 'Change Status' icon (a circle with a plus sign) highlighted by a red arrow. Below the toolbar, the work order details are visible, including Class (WORKORDEF), Work Order (37558903), and Cost Center (0001876801).

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

The 'Change Status' dialog box is shown. The 'New Status' dropdown menu is set to 'Field Complete (FCOMP)', highlighted by a red arrow. The 'Status Date' is 9/10/24 11:39 AM. At the bottom right, the 'OK' button is highlighted by a red arrow.

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

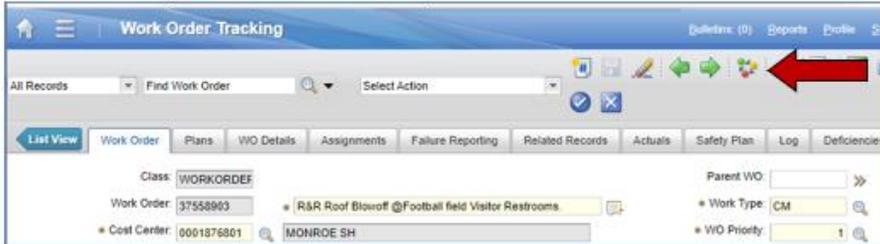


The Lead Labor Group performs these functions.

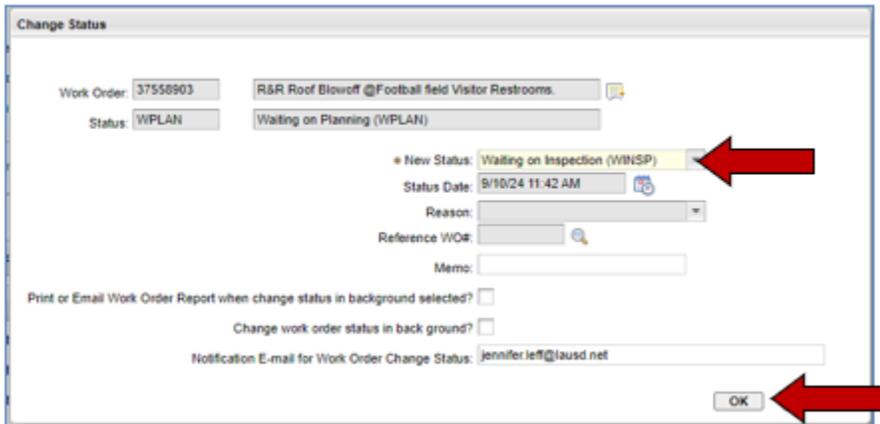
Review completed job packages, process all paperwork (purchase orders, invoices, etc...).

Change work order status to Waiting for Inspection (WINSP)

Click on the Change Status  icon in the top toolbar.



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



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.



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The screenshot shows the Maximo Work Order Tracking interface. At the top, there are navigation tabs for 'Bullets (0)', 'Reports', 'Profile', and 'Sign Out'. Below this is a search bar with 'Find Work Order' and a 'Select Action' dropdown. A red arrow points to the 'Change Status' icon in the toolbar. Below the search bar are tabs for 'List View', 'Work Order', 'Plans', 'WO Details', 'Assignments', 'Failure Reporting', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Deficiencies'. The main area displays work order details: Class: WORKORDE, Work Order: 37558903, Cost Center: 0001876801, MONROE SH, Parent WO: (empty), Work Type: CM, and WO Priority: 1.

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

The screenshot shows the 'Change Status' dialog box. It contains the following fields: Work Order: 37558903, R&R Roof Blowoff @Football field Visitor Restrooms, Status: WPLAN, Waiting on Planning (WPLAN). The 'New Status' dropdown menu is set to 'Completed (COMP)'. Other fields include Status Date: 9/10/24 11:42 AM, Reason: (empty), Reference WOW: (empty), and Memo: (empty). There are checkboxes for 'Print or Email Work Order Report when change status in background selected?' and 'Change work order status in back ground?'. The 'Notification E-mail for Work Order Change Status' field contains 'jenniferieff@lausd.net'. A red arrow points to the 'New Status' dropdown menu, and another red arrow points to the 'OK' button.

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 MaximoTeam@laschools.net.



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