



# Plant Maintenance Overview PM\_200



## Course Content



- Unit 1 – The Plant Maintenance Process
- Unit 2 – Notifications (Work Requests)
- Unit 3 – Work Orders
- Unit 4 – Materials
- Unit 5 – Time Processing
- Unit 6 – Equipment
- Unit 7 – Reports

## Prerequisites and Roles



- Prerequisites
  - ◆ PM UK\_100 IRIS/SAP Awareness & Navigation
  
- Roles
  - ◆ All Plant Maintenance IRIS users will take this class
  - ◆ Each PM class taken will allow different access roles for different users, based on each user's job and the IRIS functionality needed to perform that job.

## Plant Maintenance IRIS Project Goals

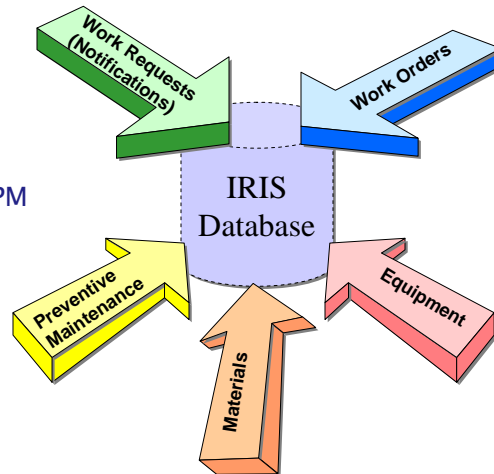


- Integrate Plant Maintenance with Finance, Human Resources, and Materials
- Allow enhanced scheduling and planning for work assignments
- Provide work scheduling as well as management reporting tools
- Improve automated updates to customers about the status of work
- Implement a Preventive Maintenance system for buildings, areas, and equipment
- Use standard SAP functionality to collect utility use and cost information for recharge calculations

## Integration Across IRIS



- IRIS data integration provides:
  - ♦ Data that flows immediately throughout the system
  - ♦ Real-time access of common information in PM
  - ♦ Virtual elimination of duplicate entries and the errors they can produce

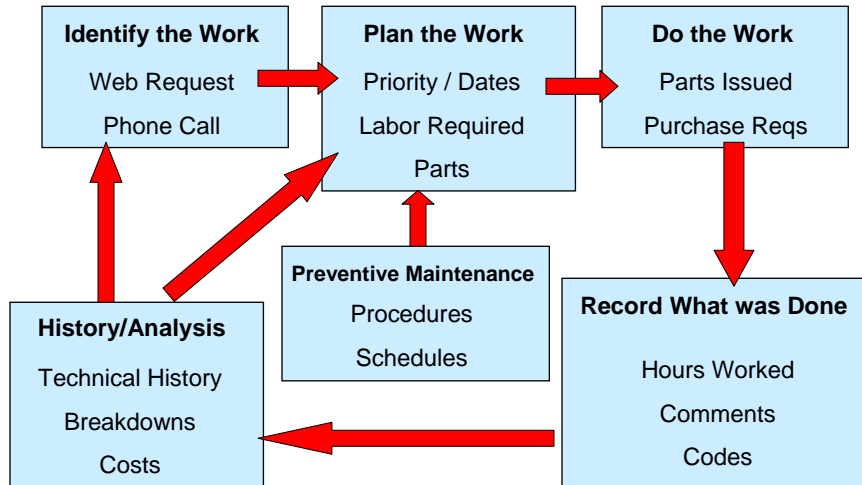


## Unit 1

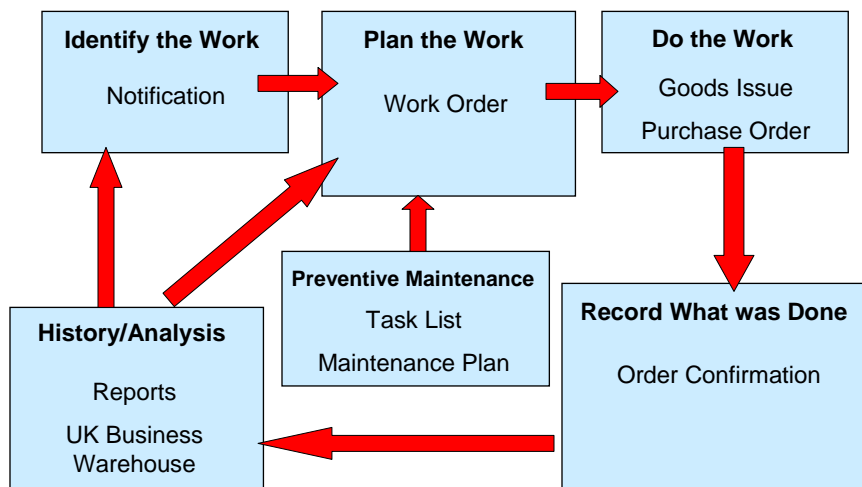


# The Plant Maintenance Process

## The Plant Maintenance Process



## The Plant Maintenance Process in IRIS



## The “Plants” in Plant Maintenance



- The **Maintenance** Plant
  - ♦ Represents the **physical** facility
  - ♦ The entire UK campus: buildings and grounds
  - ♦ Represents the place where maintenance materials are kept
  - ♦ Always **UK10**
  
- The **Planning** Plant
  - ♦ Organizational in nature
  - ♦ There are 3 main Planning Plants:
    - Main Campus PPD (CPPD),
    - Medical Center PPD (MPPD), and
    - Housing (HOUS)
  - ♦ Work groups are grouped by plant

## Functional Locations



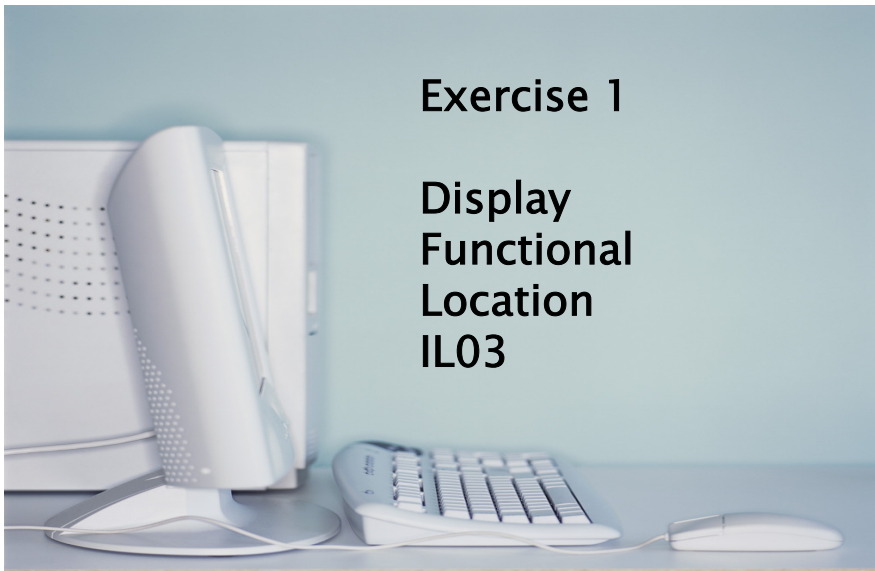
- The Functional Location Structure
  - ♦ The first level would be the “campus” (LX-)
  - ♦ The next level is the building
  - ♦ The next level is the floor
  - ♦ The next level is the room
  - ♦ There is a separate structure for **Grounds** (exterior space)

## Functional Location Structure



- The Building: LX-0030  
Student Center
- The Floor: LX-0030-02  
Student Center, 2<sup>nd</sup> floor
- The Room: LX-0030-02-249  
Student Center, 2<sup>nd</sup> floor, room 249
- LX-0030-ST  
Stairway
- LX-0030-EL  
Elevator

## Unit 1 - The Plant Maintenance Process



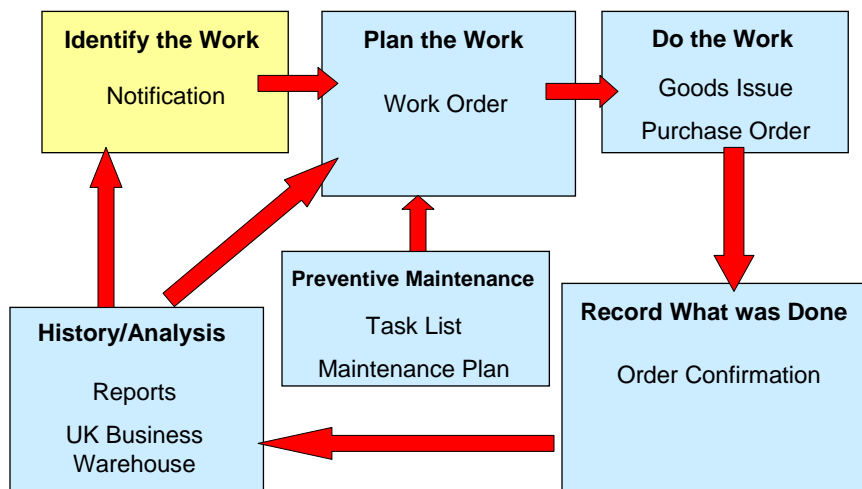
### Exercise 1

### Display Functional Location IL03



# Notifications (Work Requests)

## The Plant Maintenance Process



## What is a Notification?



- A Notification is a non-financial transaction that is used to:
  - ◆ Report a problem
  - ◆ Request work
  - ◆ Record an event or activity

Identify the Work

## How are Notifications Created?



- Notifications may be created:
  - ◆ Via a web form used to report a problem or request work
  - ◆ Through a phone call to the control desk
  - ◆ By a maintenance user, to record a log entry or technical observation



## Information Captured on a Notification



- **Description**
  - ◆ Explanation of the problem or work
  - ◆ Examples: Room too cold; Broken window
  - ◆ Can include long text for more detail
  
- **Functional Location** – the location of the work
  - ◆ LX-0030 is the Student Center
  - ◆ LX-0030-02 is Student Center, 2<sup>nd</sup> floor
  - ◆ LX-0030-02-249 is Student Center, 2<sup>nd</sup> floor, room 249
  - ◆ Stairways and elevators are also included

## Information Captured on a Notification



- **Priority** indicates when this work should be scheduled. Choices are:
  - ◆ Daily Operations
  - ◆ Emergency
  - ◆ Research FAC
  - ◆ Renovations
  - ◆ Scheduled Maintenance
  - ◆ Elective Improvement

## Information Captured on a Notification



- **Reported by**
  - ♦ The person reporting the problem
- **Main Work Center**
  - ♦ A work group or individual
  - ♦ Examples include Electric Shop, Plumbing, Cabinet Shop, Grounds, etc.

## Creating a Notification – IW21



Notification type is required. Click on the Possible Entries icon to see options. Double-click on your choice. Press Enter.

| Typ | Notification type    |
|-----|----------------------|
| CE  | PPD - Emergency      |
| CF  | Fire Alarm OOS       |
| CL  | PPD - Log Entry      |
| CP  | PPD - Problem Report |
| CR  | PPD - Work Request   |
| CX  | PPD - Ext System     |
| HE  | Housing - Emergency  |
| HF  | Fire Alarm OOS       |
| HL  | Housing - Log Entry  |
| HN  | Resnet Notification  |
| HP  | Housing- Problem Rpt |
| HR  | Housing - Work Req   |
| HX  | Housing - Ext System |
| ME  | Med Ctr - Emergency  |
| MF  | Fire Alarm OOS       |
| ML  | Med Ctr - Log Entry  |
| MP  | Med Ctr- Problem Rpt |
| MR  | Med Ctr - Work Req   |
| MX  | Med Ctr - Ext System |

## Notification Types



| Description                             | Campus PPD | Medical Center PPD | Housing PPD |
|---|------------|--------------------|-------------|
| Emergency                               | CE         | ME                 | HE          |
| Fire Alarm                              | CF         | MF                 | HF          |
| Log Entry only                          | CL         | ML                 | HL          |
| Problem Report                          | CP         | MP                 | HP          |
| Work Request                            | CR         | MR                 | HR          |
| Notification created by external system | CX         | MX                 | HX          |
| ResNet Notification                     |            |                    | HN          |

## Creating a Notification



On the next screen, fill in the **Description**, **Functional Location**, **Reported by**, and **Priority** fields

## Creating a Notification



Notification: 10000739 CP Problem with heating - too hot  
Status: OSNO  
Order: [icon]  
Reference object:  
Funct. Location: LT\_0026-01-230  
Equipment: [icon]  
Responsibilities:  
Planner group: / UK10  
Main WorkCtr: / UK10  
Reported by: BEN CRUTCHER Notif date: 01/20/2007 12:35:07  
Start/End Dates:  
Required start: 01/20/2007 12:35:07 Priority  
Required End: 00:00:00 Breakdown  
Malfunction data:  
Malfunction start: 01/20/2007 12:35 Breakdown  
Malfunction end: 00:00 Breakdown dur.

D Daily Operations  
E Emergency  
F Research FAC  
R Renovations  
S Scheduled Maint  
X Elective Improv

Select the  
Priority from the  
drop-down list

## Creating a Notification

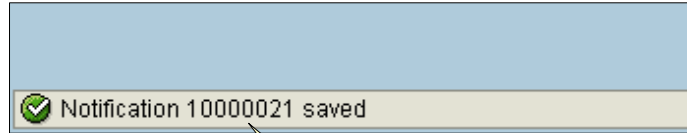


Notification: 10000739 CP Problem with heating - too hot  
Status: OSNO  
Order: [icon]  
Reference object:  
Funct. Location: LT\_0026-01-230  
Equipment: [icon]  
Responsibilities:  
Planner group: / UK10  
Main WorkCtr: / UK10  
Reported by: BEN CRUTCHER Notif date: 01/20/2007 12:35:07  
Start/End Dates:  
Required start: 01/20/2007 12:35:07 Priority: Daily Operations  
Required End: 00:00:00 Breakdown  
Malfunction data:  
Malfunction start: 01/20/2007 12:35 Breakdown  
Malfunction end: 00:00 Breakdown dur.

After entering the  
information, click  
on the Save icon

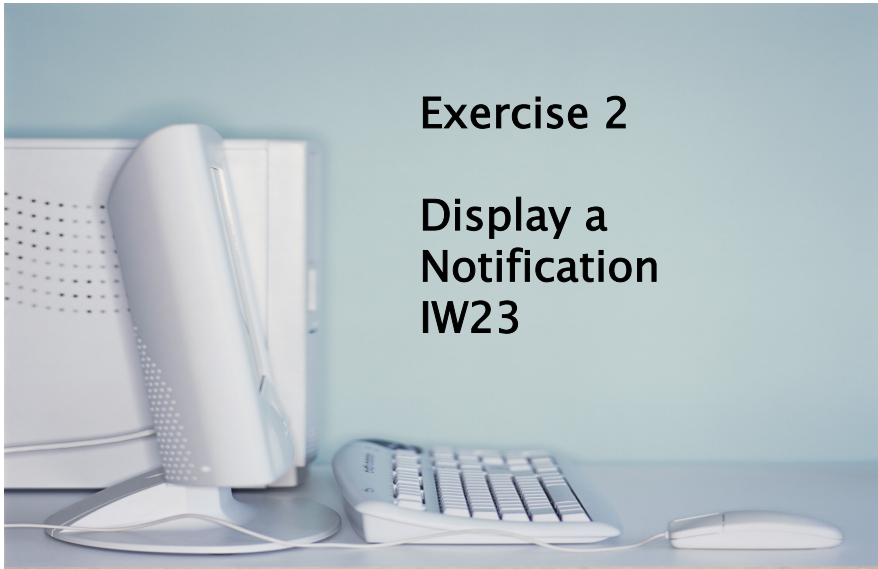


## Notification Number



The Notification number is displayed in the lower-left corner of the screen

## Unit 2 - Notifications (Work Requests)



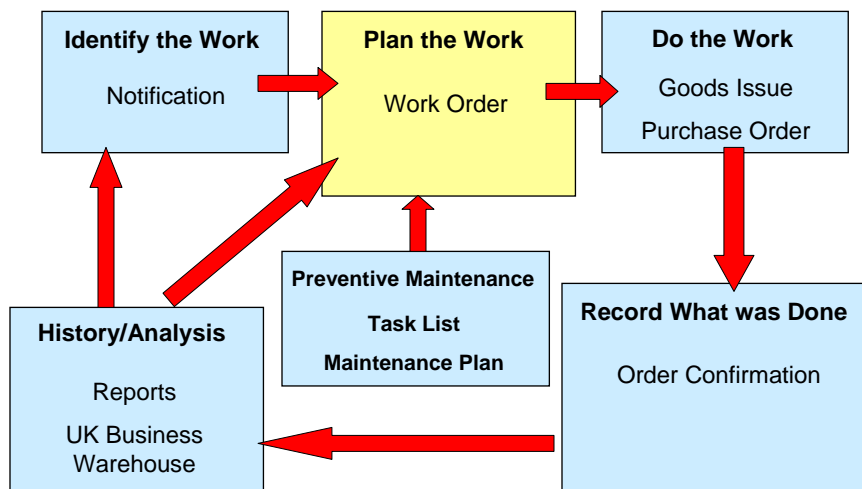
### Exercise 2

### Display a Notification IW23



# Work Orders

## The Plant Maintenance Process



## What is a Work Order?



- A financial and work management transaction used to plan and charge labor, stock materials, non-stock purchases, and services
- It is integrated with Financials, Materials Management, and Human Resources in the IRIS system
- It may be created from a Notification or without an existing Notification.
- Multiple Notifications can be turned into ONE Work Order.

**Plan the Work**

## Why are Work Orders used?



Work Orders are used:

- To plan and schedule work
- To accumulate charges for work that will be recharged to others
- To document the costs of an event
- For Preventive Maintenance work

## Who Creates Work Orders?



- This function will be used **primarily** by the Dispatch area (**Work Control Centers**) to create orders to initiate work to be done.
- Authorized users responsible for creating orders for their area will also have access to create work orders in IRIS.

## Information on a Work Order



- **Description** – includes “long text” which can be of unlimited length
- A **Priority** for the work
- An object to be maintained: A **Functional Location** (building, room) or piece of **Equipment**
- **Contact information** for the person reporting the problem or requesting work
- **Planned** labor and materials
- **Actual** labor and materials costs



## Other Work Order Information



- **Person Assigned** – This could be an individual with a specialty in a certain area
- **Materials** – Parts and supplies needed to perform the work
- **Special Conditions** – For example: Patient Rooms, Hazardous Areas
- These items can be added later as additional planning is performed for more complex orders.

## Creating a Work Order – IW31



\* Create Order: Initial Screen

Header data Exit without Saving Create Order

Order Type

Priority

Func. Loc.

Equipment

1. Enter or Select an Order Type (REPR, F...
2. Select a Priority
3. Enter a Functional Location. If this is n... enter LX and press the icon below.

There are 3 required fields on the first screen:

- Order Type
- Priority
- Functional Location

## Work Order Types



Click on the Possible Entries icon to see the list of Order Types. Double-click on the one you want to use.

| Type | Name                    |
|------|-------------------------|
| CASH | Cash Chargeout Order    |
| EVNT | Special Event Setup     |
| PREV | Preventive Maintenance  |
| RENV | Renovation(Charged Out) |
| REPR | Corrective (Repair)     |

## Work Order Types



| Type | Name  |
|------|---|
| CASH | Cash Chargeout Order<br>Example: Fraternity Work          |
| EVNT | Special Event<br>Example: Commencement                    |
| PREV | Preventive Maintenance<br>Example: Oil HVAC regularly     |
| RENV | Renovation (Charged Out)<br>Example: Install new bathroom |
| REPR | Corrective (Repair)<br>Example: Repair hinge on door      |

## Priority



|                                 |  |
|---------------------------------|--|
| Priority                        |  |
| Func. Loc.                      |  |
| Equipment                       |  |
| 1. Enter or Select              |  |
| 2. Select a Priority            |  |
| 3. Enter a Functional Location. |  |

D Daily Operations

E Emergency

G General Maint

P Patient Care

R Renovations

X Elective Improv

Click on the drop-down icon in the Priority field to see the choices.



Each priority has a specified time span for the work.

## Priority Information




| Description          | Start  | End      | Area(s)      |
|----------------------|--------|----------|--------------|
| Emergency            | 10 Min | 24 Hours | MCPPD        |
| Emergency            | 30 Min | 24 Hours | PPD, Housing |
| General Maint.       | 7 Days | 30 Days  | MCPPD        |
| Scheduleable Maint.  | 7 Days | 30 Days  | PPD, Housing |
| Daily Operations     | 1 Day  | 2 Days   | All          |
| Research Fac. Res.   | 1 Hour | 4 Hours  | PPD          |
| Priority Maintenance | 1 Hour | 4 Hours  | Housing      |
| Patient Care         | 1 Hour | 4 Hours  | MCPPD        |
| Elect. Improv.       | 3 Days | 10 Days  | MCPPD        |
| Elect. Improv.       |        |          | PPD, Housing |
| Renovations          |        |          | PPD, MCPPD   |
| Renovations/AptChk   |        |          | Housing      |

## Functional Location




Order Type REPR  
Priority D Daily Operations

Func. Loc.  

Equipment

1. Enter or Select an Order Type (REPR, F...
2. Select a Priority
3. Enter a Functional Location. If you do not know the Functional Location code, enter LX and press the icon below.


If you do not know the Functional Location code, click on the Possible Entries icon to search for it.




## Functional Location



Functional Location (1)

Uppermost FunctLocations by location | Location list | Address | Text (= Descr... | 

Description  

Language Key

Functional Location

Maximum No. of Hits

The Functional Location search box will appear. Navigate to the **Text(= Description)** tab.

Enter your search text in the Description field. The asterisk is the wildcard character. Example: \*mcvey\* for McVey Hall.

Then press the Enter key.

## Functional Location



Functional Location (1) 155 Entries found

Uppermost Funct.Locations by location Location list

| Functional Location | Description of functional locat... | Language |
|---------------------|------------------------------------|----------|
| LX-0045             | MCVEY HALL                         | EN       |
| LX-0045-00-08       | MCVEY HALL - Room 008              | EN       |
| LX-0045-00-09       | MCVEY HALL - Room 009              | EN       |
| LX-0045-00-09A      | MCVEY HALL - Room 009A             | EN       |
| LX-0045-00-12       | MCVEY HALL - Room 012              | EN       |
| LX-0045-00-13       | MCVEY HALL - Room 013              | EN       |
| LX-0045-00-14       | MCVEY HALL - Room 014              | EN       |
| LX-0045-00-14A      | MCVEY HALL - Room 014A             | EN       |
| LX-0045-00-14B      | MCVEY HALL - Room 014B             | EN       |
| LX-0045-00-15       | MCVEY HALL - Room 015              | EN       |
| LX-0045-00-15A      | MCVEY HALL - Room 015A             | EN       |
| LX-0045-00-16       | MCVEY HALL - Room 016              | EN       |
| LX-0045-00-57       | MCVEY HALL - Room 057              | EN       |
| LX-0045-00-58       | MCVEY HALL - Room 058              | EN       |
| LX-0045-00-58A      | MCVEY HALL - Room 058A             | EN       |
| LX-0045-00-58B      | MCVEY HALL - Room 058B             | EN       |
| LX-0045-00-59       | MCVEY HALL - Room 059              | EN       |
| LX-0045-00-60       | MCVEY HALL - Room 060              | EN       |
| LX-0045-00-60A      | MCVEY HALL - Room 060A             | EN       |
| LX-0045-00-61       | MCVEY HALL - Room 061              | EN       |
| LX-0045-00-69       | MCVEY HALL - Room 069              | EN       |
| LX-0045-00-71       | MCVEY HALL - Room 071              | EN       |
| LX-0045-00-72       | MCVEY HALL - Room 072              | EN       |

The Functional Location matches will be displayed.

Double-click on the appropriate location to populate the Functional Location field on the Order.

## Creating a Work Order



Order Edit Goto Extras Environment System Help

\* Create Corrective (Repair): Initial Screen

Header data Exit without Saving Create Order

Order Type REPR  
Priority D Daily Operations  
Func. Loc. LX-0045-00-72  
Equipment

1. Enter or Select an Order Type (REPR, R...
2. Select a Priority
3. Enter a Functional Location. If this is no...  
enter LX and press the icon below.

After completing the fields, press the Enter key or click on the Create Order button.

Create Order

## Creating a Work Order



Create Corrective (Repair) : Central Header

Order REPR 80000000001 Repair door hinge

Sys.Status CRTD MANC PRC

HeaderData Operations Components Costs Objects Addit. Data


Person responsible  
PlannerGrp / UK10  
Mn.wk.ctr UNASSIGN / CPPD Campus PPD Un...  
Person res...

Dates  
Bsc.start 02/21/2007 Priority Daily  
Basic fin. Revision

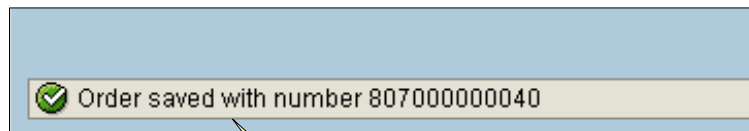
Reference object  
Func. Loc. LX-0045-01-100 MCVEY HALL -  
Equipment  
Assembly

First operation  
Operation Repair door hinge  
WkCtr/Ekst UNASSIGN / CPPD Ctrl key PM01 Ac  
Work durtn 2 H Number

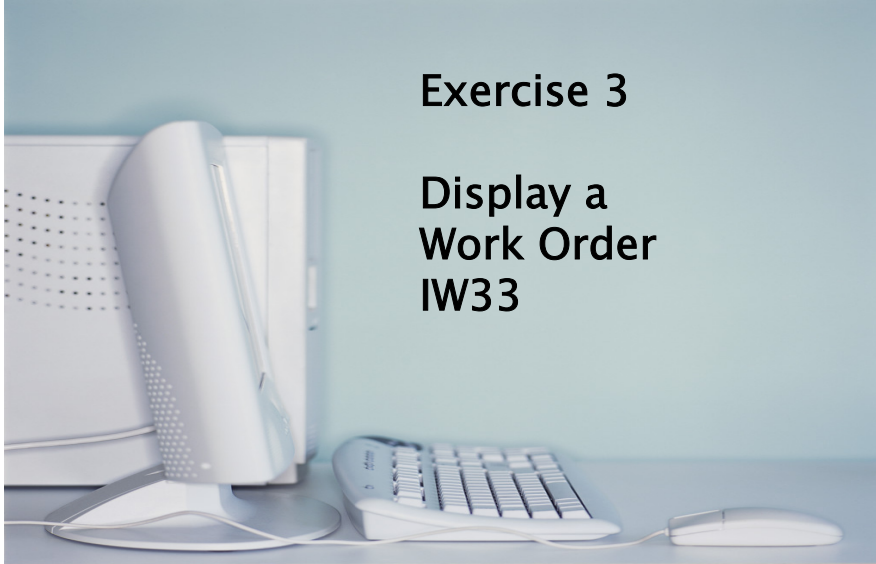
The work order will appear. Enter a description of the work and an **estimate** of labor time required.

Click on the Save icon 

## Work Order Number



The Work Order number is displayed in the lower-left corner of the screen



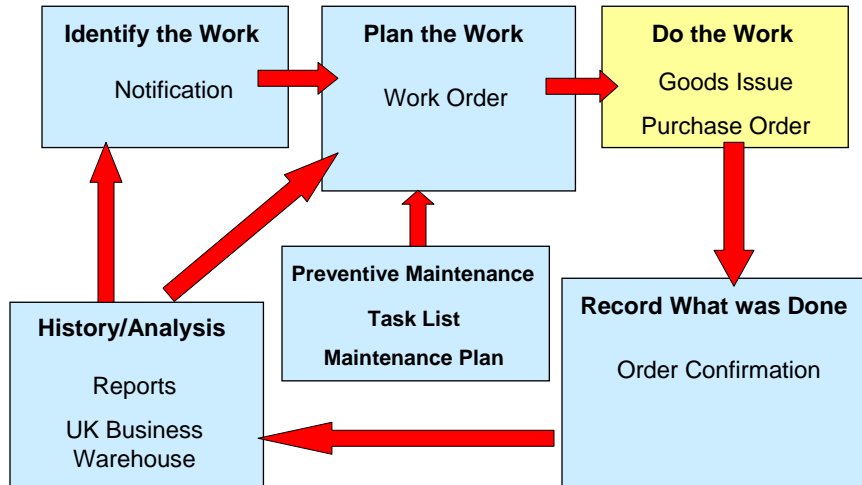
### Exercise 3

### Display a Work Order IW33



# Materials

## The Plant Maintenance Process



## Materials and Inventory



- Materials Management Inventory will be replacing Stores Inventory Systems
- On-shelf inventory will be minimized
- We are moving toward “just-in-time” inventory (parts will be requisitioned daily)
- We are moving away from ProCard being used for materials; instead, contracts will be set up
- There will be stock, non-stock, and non-file materials
- Materials may be planned (used on a routine basis) and unplanned
- Stock and non-stock materials will be identified by numbers in IRIS



## Stock Materials on a Work Order



- We are assigning numbers for parts we keep “in stock” on campus – called **Stock Materials**
- Putting stock material numbers on your work order will create a **Reservation** for you at the Storeroom
- The Storeroom can then pick, stage, and deliver the materials as required
  - ♦ For example, say next week you plan to replace the air filters in your building. You can set up the work order and under materials needed go ahead and fill out the number for air filters. If the materials are “stock”, this will reserve the materials you need. You can pick them up under your Work Order number or the Storeroom can deliver the materials when needed.

## Non-Stock Materials on a Work Order



- Items that we don't want to store on campus but rather get on an as-needed basis, these are called non-stock and can also be assigned material numbers
- If you need non-stock materials, when they are placed on the work order the system will **automatically** generate a **purchase requisition** that will go thru Purchasing. These are automated because we have set up contracts with commonly used Vendors.
- Purchasing can take a look at these purchase orders on the computer and approve them. Much faster process than the old paper days and less paper work.
- The materials are ordered from the Vendor and delivered to Central Stores. The Storeroom can then pick, stage, and deliver the materials as required

## Non-File Materials on a Work Order



- Not everything will have a material number. We call these things **non-file materials**
- Non-file materials are parts ordered as needed and do not have IRIS material numbers
- If you have a Work Order where you need to order a non-file material, you will manually create a Purchase Requisition. The system can't do these automatically because we probably don't have contracts set up with the Vendor
- This is the process used for those hard-to-find parts. Once you find a supplier for the item, you will proceed with a Purchase Requisition (as we do currently) or use the Pro-Card when necessary

## Unplanned Materials on a Work Order



- If you are on your way to a job and realize you need light bulbs, you certainly can drop by the Storeroom and pick up the bulbs without having to drive first to a computer to reserve them!
- These are called **Unplanned Materials** – since you did not plan ahead to reserve them on a work order
- If Storeroom has some on hand, they will issue those to you. They will go into the computer and add the unplanned materials in under your Work Order number. This way, recharges will be kept up correctly
- They will also get your name when you pick up the materials

## Placing Materials on a Work Order

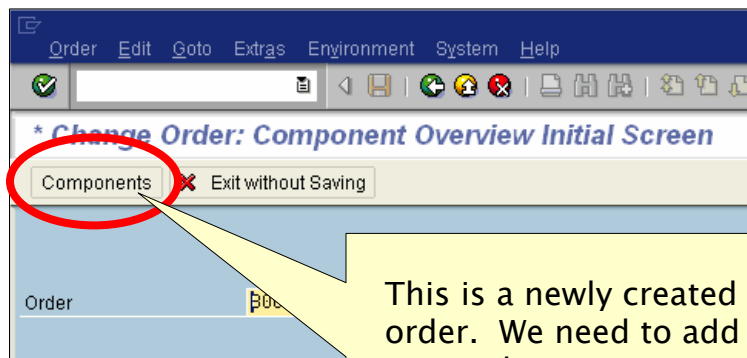


- There is an area on a work order called **Components** where you list all materials
- Enter the material number, if known
- Do a **Possible Entries search** to find the part number or description
  - ♦ Remember, you can use Asterisks as “wildcards” in a search to let you search to use partial information
  - ♦ For example: \*filter\* will find all materials with “filter” in the description – air filters, water filters, pool filters, waste filters, etc.
  - ♦ Just double click to choose the desired part from the search list

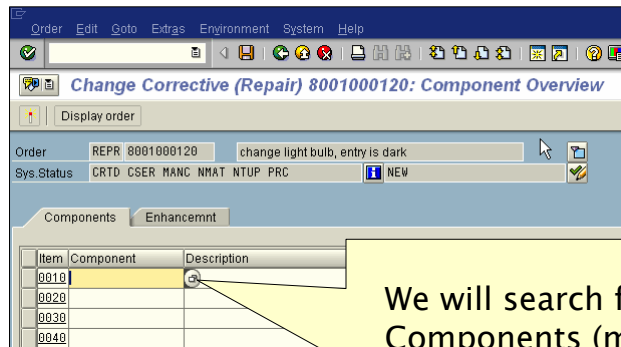
### Future Enhancements:

- **Bill of Material** for the building, room, or equipment to be maintained. The BOM may be used to suggest part numbers.
- **Task List** – if you include the Task List on an order this will **also** include any materials on that Task List.

## Planning Materials on an Order

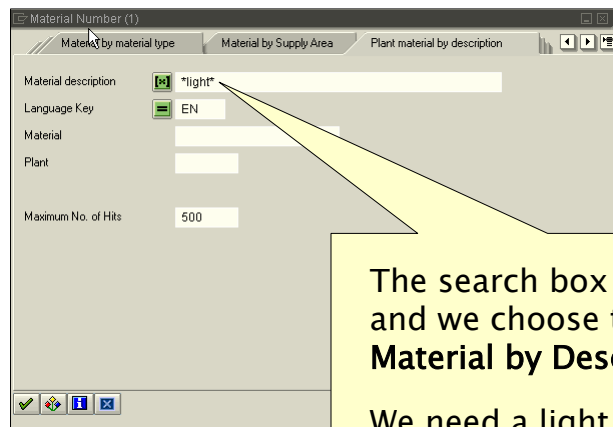


## Planning Materials on an Order



We will search for the Components (materials) needed by clicking on the Possible Entries icon in the Component field.

## Planning Materials – Search by Description



The search box appears, and we choose the **Plant Material by Description** tab.

We need a light bulb, so we will search for all materials with **light** in the description.

## Planning Materials - Search by Description



Material Number (1) 35 Entries found

Material by material type    Material by Supply Area

| Material description                   | Language | Material | Plant |
|--|----------|----------|-------|
| ANTI KAPPA FREE LIGHT CHAINS           | EN       | 22029    | UK00  |
| ANTI LAMBDA FREE LIGHT CHAINS          | EN       | 3030     | UK00  |
| BULB <sup>A</sup> X6000 LIGHT SOURCE   | EN       | 36564    | UK00  |
| CABLE <sup>A</sup> FIBER OPTIC LIGHT   | EN       | 36113    | UK00  |
| CABLE <sup>A</sup> LIGHT               | EN       | 35691    | UK00  |
| CARRIER FIBER OPTIC LIGHT              | EN       | 35699    | UK00  |
| CARRIER FIBER OPTIC LIGHT              | EN       | 35700    | UK00  |
| CARRIER FIBER OPTIC LIGHT 12CM         | EN       | 35720    | UK00  |
| CARRIER FIBER OPTIC LIGHT 7.5CM        | EN       | 33933    | UK00  |
| CARRIER <sup>A</sup> FIBER OPTIC LIGHT | EN       | 35882    | UK00  |
| CARRIER <sup>A</sup> HIGH TRANS LIGHT  | EN       | 35710    | UK00  |
| DEFLECTOR PRISMIC LIGHT                | EN       | 35711    | UK00  |
| DEFLECTOR PRISMIC LIGHT                | EN       | 34035    | UK00  |
| ELEVATOR <sup>A</sup> SLIGHTLY CURVED  | EN       | 40405    | UK00  |
| FORM FLIGHT RECORD PAGE 1              | EN       | 40406    | UK00  |
| FORM FLIGHT RECORD PAGE 2              | EN       | 35438    | UK00  |
| HEADS <sup>A</sup> FIBEROPTIC LIGHT    | EN       | 50303    | UK00  |
| LIGHT BULB, 40W, DAYLIGHT              | EN       | 50347    | UK00  |
| LIGHT BULB, INCANDESCENT, 100W         | EN       | 50348    | UK00  |
| LIGHT BULB, INCANDESCENT, 150W         | EN       | 33931    | UK00  |
| LIGHT CABLE 3.5MM X 180CM              | EN       | 33948    | UK00  |
| LIGHT CABLE 3.5MM X 230CM              | EN       |          | UK00  |

The search results appear.

Double-click on the desired material.

## Planning Materials on an Order



Change Corrective (Repair) 8001000120: Component Overview

Display order

Order: REPR 8001000120    change light bulb, entry is dark

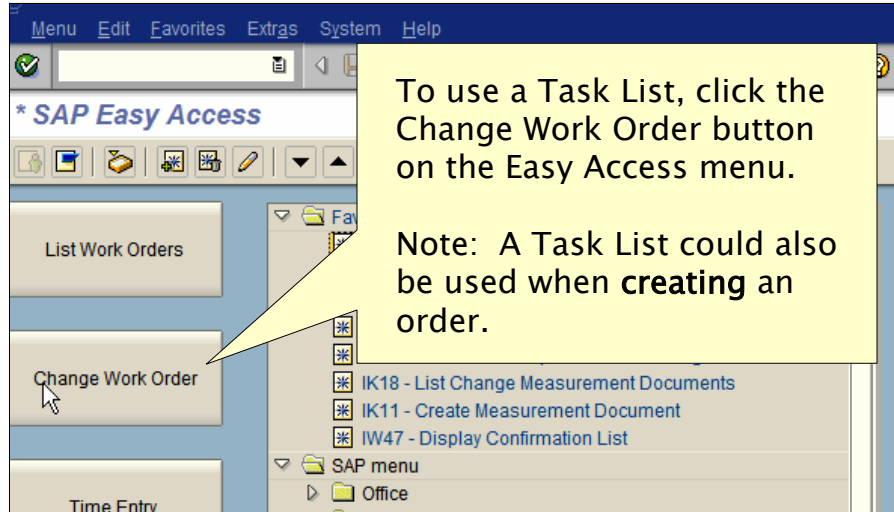
Sys. Status: CRTD CSER MANC NMAT PRC    NEW

| Item | Component | Description                    | LT | Reqmnt Qty | UM | IC | S | SLoc | Plant | Op... | Batch | Procurement Ty.    |
|------|-----------|--------------------------------|----|------------|----|----|---|------|-------|-------|-------|--------------------|
| 0010 | 50348     | Light Bulb, Incandescent, 150W |    | 2          | EA | L  |   |      | UK10  | 0010  |       | Reservation for or |
| 0020 |           |                                |    |            |    |    |   |      |       |       |       |                    |
| 0030 |           |                                |    |            |    |    |   |      |       |       |       |                    |

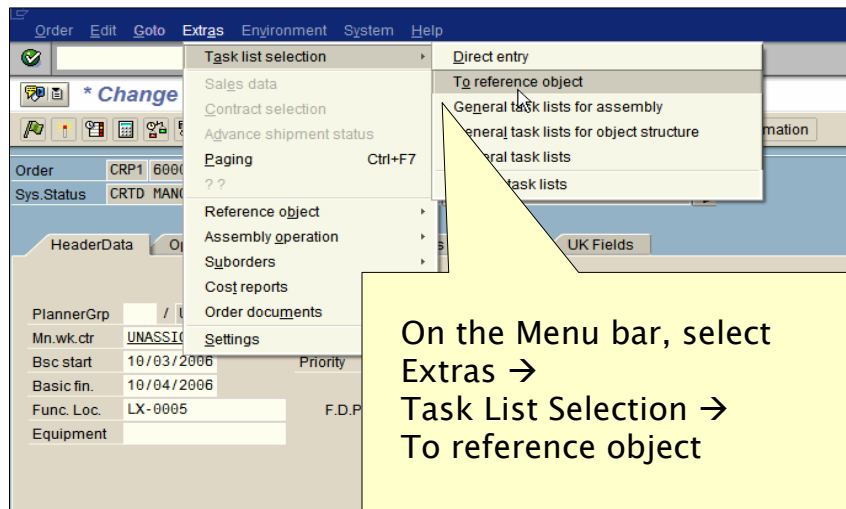
The Component field is now populated. Enter the quantity required and unit of measure. Repeat for each component.

Click the Save icon.

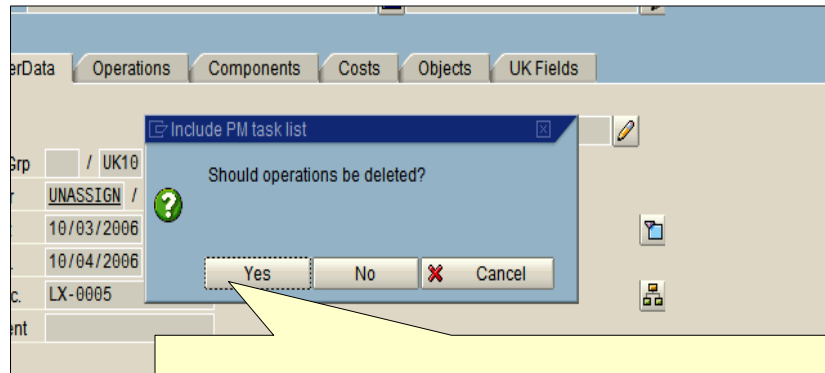
## Planning Materials - By Task List



## Planning Materials - By Task List



## Planning Materials - By Task List



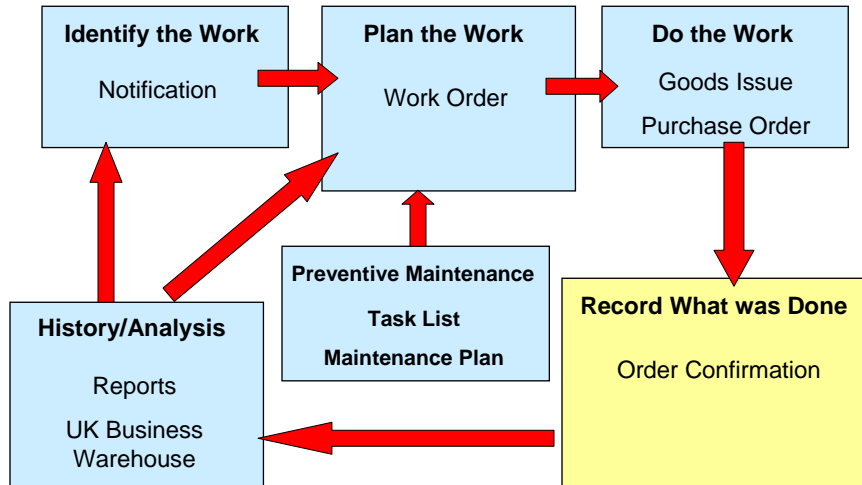
The system will ask whether to delete the planning you have done.  
If you click on "Yes" the Task List will **replace** what you have entered; otherwise, the Task List will be **added** to what you have entered.

## Unit 5



# Time Processing

## The Plant Maintenance Process



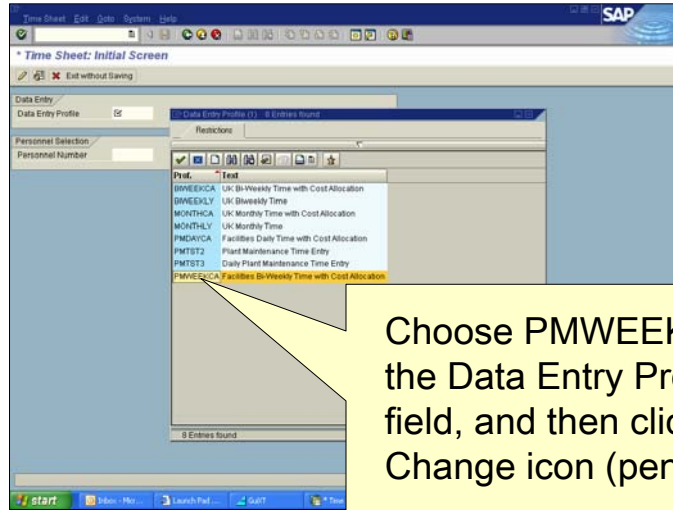
## Time Entry



The screenshot shows the SAP Easy Access screen. The left sidebar contains several buttons: List Work Orders, Change Work Order, Time Entry, Enter Measurements, and List Notifications. The Time Entry button is highlighted with a yellow callout box. The callout box contains the text: "To begin, the Timekeeper clicks on the Time Entry button on the SAP Easy Access screen." Below the text is a small button labeled "Time Entry".



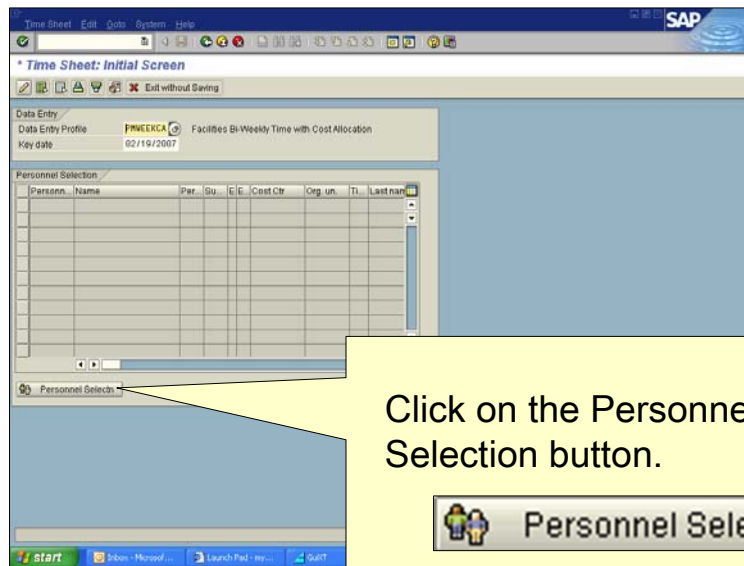
# Time Entry



Choose PMWEEKCA in the Data Entry Profile field, and then click on the Change icon (pencil).



# Time Entry



Click on the Personnel Selection button.



## Time Entry



Personnel Number Selection for Fast Data Entry

Further selections Search helps Sort order Org. structure

Period  
 Today  
 Up to today  
 Current month  
 From today  
 Current year  
 Other period  
Period: \_\_\_\_\_ To: \_\_\_\_\_  
Payroll period: \_\_\_\_\_

Selection  
Personnel Number: 24503  
Employment status: 0  
Time recording administrator: \_\_\_\_\_

Additional data  
Job: \_\_\_\_\_ to: \_\_\_\_\_  
Organizational unit: \_\_\_\_\_ to: \_\_\_\_\_  
Position: \_\_\_\_\_ to: \_\_\_\_\_  
Work schedule rule: \_\_\_\_\_ to: \_\_\_\_\_  
Payroll administrator: \_\_\_\_\_ to: \_\_\_\_\_  
HR administrator: \_\_\_\_\_ to: \_\_\_\_\_  
Time data administrator: \_\_\_\_\_ to: \_\_\_\_\_

Enter the Personnel Number and then click the Execute icon.

On the list that appears, highlight the person and click the Change icon.

## Time Entry



Time Sheet: Data Entry View

Data Entry Period: 02/18/2007 - 02/03/2007

| LT | Pers No. | Name         | ActTyp | Rec. order   | Act. | Work Ctr | Plant/VA  | Name         | Total | SU | 02/18 | From | To |
|----|----------|--------------|--------|--------------|------|----------|-----------|--------------|-------|----|-------|------|----|
|    | 24503    | Bruce Miller |        |              |      |          |           | MILLER BRUCE | 7     |    | 0     |      |    |
|    | 24503    | Bruce Miller |        | 887688888825 | B018 | UNASSIGN | CPPD 1695 | MILLER BRUCE | 4     |    |       |      |    |
|    | 24503    | Bruce Miller | LABOR  | 887688888840 | B018 | UNASSIGN | CPPD 1695 | MILLER BRUCE | 3     |    |       |      |    |

The Data Entry View screen will display. Highlight the row and enter the data.

## Time Entry



The time can be entered either in total time by work order or by start and stop times in military time.

## Unit 6



# Equipment

## Equipment in Plant Maintenance



- Equipment is a uniquely identifiable object
  - ◆ You can install it
  - ◆ You can maintain it separately from maintaining the building or room in which it is installed
  - ◆ You can remove it
  - ◆ IRIS keeps a history of the maintenance of that equipment regardless of where it is installed
  - ◆ Technical information is stored with the equipment master record
  - ◆ Preventive maintenance may or may not be scheduled for equipment

## Creating Equipment



- Equipment information
  - ◆ Equipment number
  - ◆ Description
  - ◆ Functional Location
  - ◆ Manufacturer information, which can include model number, manufacturer part number, manufacturer serial number
  - ◆ Maintenance Plant – **ALWAYS UK10**
  - ◆ Main Work Center Work Group and Planning Plant

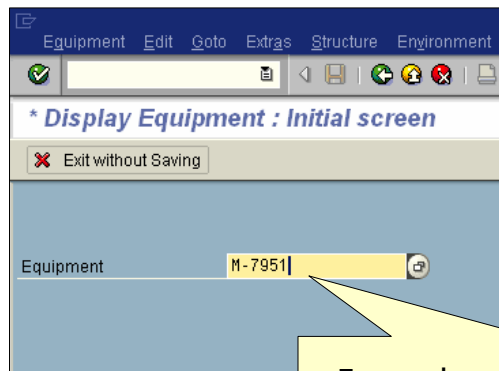
## The Equipment Number



When creating equipment, each unit will manually enter its own equipment number, using a letter prefix before the number to identify who the equipment belongs to.

For example: C = Campus PPD  
M = Med Center PPD  
H = Housing

## Display Equipment – IE03



Enter the equipment number in the **Equipment** field, or click the Possible Entries icon to search for the number. Then press Enter.

## Equipment - General Data



|             |                |          |            |          |
|-------------|----------------|----------|------------|----------|
| Equipment   | 26K-5          | Category | M          | Machines |
| Description | WATER FOUNTAIN |          |            |          |
| Status      | INST           |          |            |          |
| Valid From  | 09/21/2006     | Valid To | 12/31/9999 |          |

|                   |            |               |   |
|-------------------|------------|---------------|---|
| Manufacturer data |            |               |   |
| Manufacturer      | OASIS      | ManufCountry  |   |
| Model number      | DP7WM-1PE  | Constr.yr/mth | / |
| ManufPartNo.      |            |               |   |
| ManufSerialNo.    | 8524126100 |               |   |

The information for that piece of equipment is displayed. Manufacturer data can be found on the **General** tab.

## Equipment - Who Pays



|                    |            |                        |      |                     |           |           |  |
|--------------------|------------|------------------------|------|---------------------|-----------|-----------|--|
| General            |            | Location               |      | Organization        |           | Structure |  |
| Account assignment |            |                        |      |                     |           |           |  |
| Company Code       | UK00       | University of Kentucky |      |                     | Lexington |           |  |
| Business Area      | 0101       | UK w/o component units |      |                     |           |           |  |
| Asset              |            | /                      |      |                     |           |           |  |
| Cost Center        | 1012010650 | /                      | UK00 | P.P. BUILDING MAINT |           |           |  |
| WBS Element        |            |                        |      |                     |           |           |  |
| StandgOrder        |            |                        |      |                     |           |           |  |
| SettlementOrder    |            |                        |      |                     |           |           |  |

Cost Center information is on the **Organization** tab.

## Equipment - Where Installed



General Location Organization Structure

Structuring

Funct. Location L2-0082-04

Description COLLEGE OF PHARMACY - Floor 04

SuperEquip.

Description

Position

TechIdentNo.

ConstType

Functional Location information is on the Structure tab.

## Equipment - Classification



Assignments

| Class         | Description                              | Sta...                   | S... | Icon                                | Item |
|---------------|--|--------------------------|------|-------------------------------------|------|
| PM_MEDCTR_ALL | Medical Center Equipment Characteristics | <input type="checkbox"/> | 1    | <input checked="" type="checkbox"/> | 10   |

Entry 1 / 1

Values for Class PM\_MEDCTR\_ALL - Object Z6K-5

General

| Characteristic | Description | Value |
|----------------|-------------|-------|
| JCAH Code      |             | NONJC |
| Department     |             | 70611 |
| Supplier       |             | UNSP  |
| Project        |             | 81082 |
| Patient Room?  |             | No    |
| PO Number      |             | NULL  |
| Vendor ID      |             | NULL  |
| Vendor Type    |             | NULL  |
| Other (Vendor) |             | NULL  |
| Life           |             | 10    |

Classification information may also be available, such as JCAH code for the Hospital.



## Exercise 4

### Display Equipment IE03



# Reports



## Reporting in IRIS



- IRIS data can be extracted and analyzed.
- Use selection screens and variants to narrow your requests for information.
- Drill-down functionality can provide detail.
- List Displays can help manage work – you can specify criteria and produce lists of notifications, work orders, equipment, functional locations, etc., for planning and analysis.

## List Display Notifications – IW29



Notification status  
 Outstanding  Postponed  In process  Completed Set profit:  Adstr.

Notification selection

|                     |            |    |            |
|---------------------|------------|----|------------|
| Notification        | to         |    |            |
| Notification type   | to         |    |            |
| Functional location | to         |    |            |
| Equipment           | to         |    |            |
| Material            | to         |    |            |
| Serial number       | to         |    |            |
| Adstr. device data  | to         |    |            |
| Order               | to         |    |            |
| Notification date   | 06/15/2006 | to | 09/13/2006 |
| Partners            |            |    |            |

General Data/Administrative Data

|                   |          |    |          |
|-------------------|----------|----|----------|
| Description       | to       |    |          |
| Created by        | to       |    |          |
| Created on        | to       |    |          |
| Notification time | 00:00:00 | to | 00:00:00 |
| Reference date    | to       |    |          |
| Coding            | to       |    |          |
| Coding Code       | to       |    |          |
| Priority          | to       |    |          |
| Reported by       | to       |    |          |
| Changed by        | to       |    |          |
| Changed on        | to       |    |          |
| Status included   | to       |    |          |
| Status excluded   | to       |    |          |

Example: To display certain notifications, you first specify your criteria, such as Notification Status, Type, and Functional Location.

## List Display Notifications - IW29



Program Edit Goto System Help

Display Notifications: Selection of Notifications

Notification status  
 Outstanding  Postponed  In process  Completed Sel.profil [ ] Addr. [X]

Notification selection

|                     |        |    |  |
|---------------------|--------|----|--|
| Notification        |        | to |  |
| Notification type   | CE     | to |  |
| Functional location |        | to |  |
| Equipment           |        | to |  |
| Material            |        | to |  |
| Serial number       |        |    |  |
| Addit. device data  |        |    |  |
| Order               |        |    |  |
| Notification date   | 10/28/ |    |  |
| Partners            |        |    |  |

In this example, we have selected criteria that will display a list of CPPD Emergency Notifications that are outstanding or in process.

## List Display Notifications - IW29



Program Edit Goto System Help

Display Notifications: Selection of Notifications

Notification status  
 Outstanding  Postponed  In process  Completed Sel.profil [ ] Addr. [X]

Notification selection

|                     |            |    |  |
|---------------------|------------|----|--|
| Notification        |            | to |  |
| Notification type   | CE         | to |  |
| Functional location |            | to |  |
| Equipment           |            | to |  |
| Material            |            | to |  |
| Serial number       |            |    |  |
| Addit. device data  |            |    |  |
| Order               |            |    |  |
| Notification date   | 10/28/2006 |    |  |
| Partners            |            |    |  |

After specifying the criteria, you can save it for future use as a variant by clicking on the Save icon.



## Creating a Variant



The **Save as Variant** screen will appear. Give the variant a name and description (Meaning), and then protect it from changes.

Click on the **Save icon**



## Display the List



You will be returned to the criteria selection screen. Click on the **Execute icon**



## Display the List



The screenshot shows the IRIS software interface with the menu bar (List, Edit, Goto, Notification, Environment, Settings, System, Help) and a toolbar. The main window title is "Display Notifications: List of Notifications". Below the toolbar is a table with the following data:

| Notification | Notif.date | Description                      |
|--------------|------------|----------------------------------|
| 10000586     | 11/20/2006 | Rms B-39 & B-41, install foamers |
| 10000626     | 11/30/2006 | Test three                       |
| 10000627     | 11/30/2006 | Test 1 -                         |
| 10000628     | 10/30/2006 | Install dead bolts               |
| 10000643     | 12/06/2006 | Repair                           |

The results display as a list of notifications that match the criteria you specified.

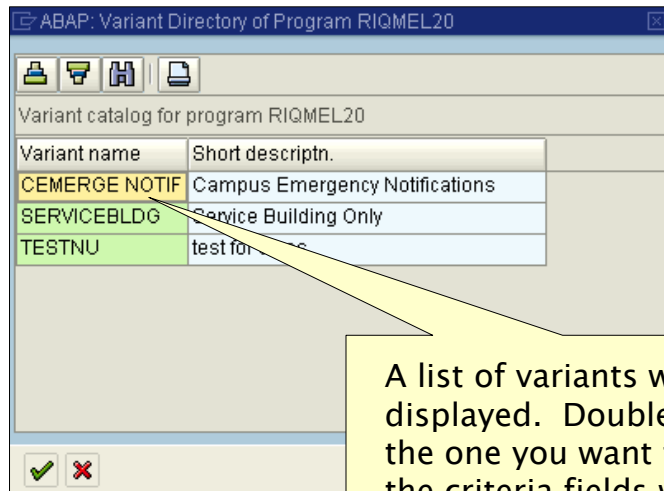
## Using a Variant



The screenshot shows the IRIS software interface with the menu bar (Program, Edit, Goto, System, Help) and a toolbar. The main window title is "Display Notifications: Selection of Notifications". Below the toolbar is a "Notification status" section with checkboxes for "Outstanding", "Postponed", "In process", and "Completed". Below that is a "Notification selection" section with a list of criteria: Notification, Notification type, Functional location, Equipment, Material, Serial number, Addit. device data, Order, Notification date, and Partners. A yellow callout box points to the "Get Variant" icon (a square with a plus sign) in the toolbar.

The next time you want to produce a current list of notifications meeting those criteria, click on the Get Variant icon.



## Using a Variant

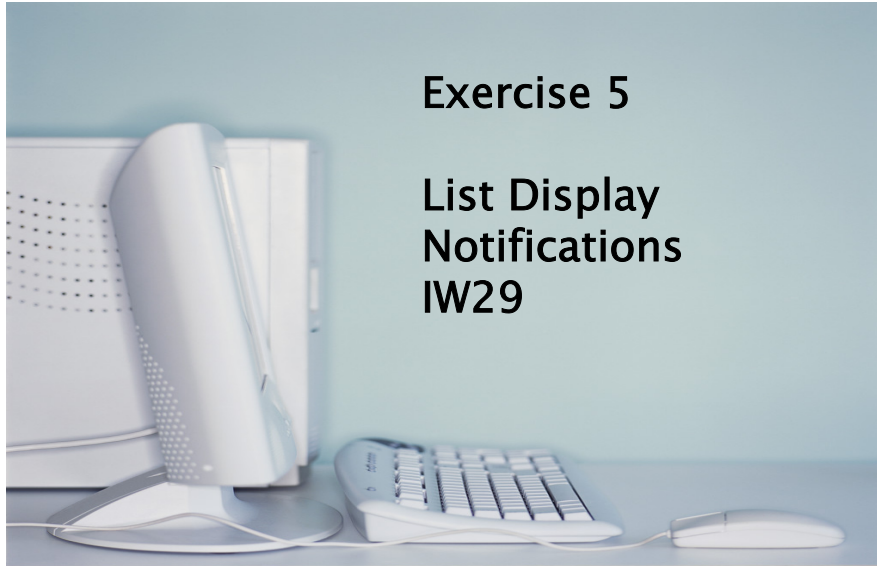


A list of variants will be displayed. Double-click on the one you want to use and the criteria fields will be populated automatically.

## Download Data to Spreadsheet



- When the list is displayed, click on the **Spreadsheet** icon. 
- You will be prompted to “Enter number of key columns.” You can leave this unchanged (at 1).
- You will be prompted to choose “Table” or “Pivot Table”. Choose **Table** and click on the **Continue** icon.
- You will be prompted to save to MS Excel. Click on the **Continue** icon. 
- Be patient. The data will appear in an Excel spreadsheet that you can format, save, and use as you wish.



## Exercise 5

### List Display Notifications IW29

## Course Summary

You should now have a better understanding of:

- The Plant Maintenance Process
- Notifications (Work Requests)
- Work Orders
- The Plant Maintenance–Materials Management Relationship
- PM Time Processing
- Equipment
- Reports



## Contact Information



- First point of contact for any problems should be the IRIS-PM Power User in your area
  - ♦ Nick Arnold - Nick@uky.edu - 559-7605
  - ♦ Kevin Jones - Kevin.Jones@uky.edu - 7-3421
  - ♦ Skip Van Hook - bevanh2@email.uky.edu - 7-5397
  
- IRIS Plant Maintenance Team
  - ♦ Kevin Cheser - kchese@email.uky.edu
  - ♦ Ben Crutcher - ben@email.uky.edu
  
- For more information visit the IRIS PM web site:
  - ♦ [www.uky.edu/IRIS/PM](http://www.uky.edu/IRIS/PM)