Plant Maintenance
Time Processing
PM_TP_300

Prerequisites and Roles

• Prerequisites
  • PM_UK_100 – PM IRIS Awareness & Navigation

• Roles
  • Users responsible for processing Plant Maintenance work order time
Course Content

• Introduction
• Unit 1 – CATS Time Entry
• Unit 2 – Selection Variants
• Unit 3 – Time Approval & Transfers
• Unit 4 – PM Direct Time Entry (STEPS)
• Unit 5 – Time Display
• Course Summary
• Assessment

Course Learning Objectives

• Understand the complete Plant Maintenance (PM) order confirmation/time entry process
• Be able to enter, edit, approve, transfer, and display order confirmation time
• Learn how to create and save selection variants for working with multiple employees
The Maintenance Process

Identify the Work
- Notification
  - Web Request
  - Phone Call

Plan the Work
- Work Order
- Priority / Dates
- Labor Required
- Parts

Do the Work
- Goods Issue
- Parts Issued
- Purchase Order
- Purchase Requisition

Preventive Maintenance
- Task List
- Procedures
- Maintenance Plan
- Schedules

History/Analysis
- Reports
- UK Business
- Warehouse
- Technical History
- Breakdowns
- Costs

Record Work Done
- Order
- Confirmation
- Hours/Time Worked
- Comments
- Codes

PM Order Confirmation (Time) Processing

1. Time is entered in CATS:
   **CAT2** (IW44 for STEPS)

2. Time is approved in CATS:
   **CATS_APPR_LITE**

3. Time is transferred from CATS to IRIS: **ZCAT6**

4. Time is transferred from CATS to PM: **CAT9**
Payroll Lock Schedule

- Used once a payroll process has started
- Allows Payroll/IRIS HR Team to either make corrections and/or run payroll
- Time can be entered and approved in CATS and transferred to PM, but it **can not be transferred to IRIS** when the system is locked
- System is locked as follows for a biweekly pay period:
  - Thursday 5:00 pm – Friday 7:00 am
  - Friday 5:00 pm – Saturday 7:00 am
  - Sunday 5:00 pm – Monday 7:00 am
  - Monday 3:00 pm – Wednesday 7:00 am

Unit 1

CATS Time Entry
CATS Time Entry

• Cross Application Time Sheet
• CATS is an interface application to IRIS-HR used for entering employee work/absence time
• Time can be entered on a daily basis – OR – once per pay period, just as long as it is entered by the required time input deadlines listed on the Payroll Schedule
• Although it is an interface to IRIS, CATS is still accessed using various IRIS transaction codes
• Click on the Time Entry box on the SAP Easy Access screen or enter transaction code CAT2 to begin the time entry process

Data Entry Profile

• The Data Entry Profile field determines the layout of the CATS Time Sheet: Data Entry View screen
  • PMDAYCA – One day – Multiple employees
  • PMDAYCA2 – One day – One employee
  • PMWEEKC1 – Biweekly pay period – One/Multiple employees – No “To/From” time columns displayed (for Campus/Housing)
  • PMWEEKCA – Biweekly pay period – One/Multiple employees

Click on the Possible Entries icon to select from list
Key Date

- The **Key Date** field must be either the:
  - date for single-day entry
  - beginning date of a biweekly pay period
- This field (along with the **Data Entry Profile**) must always be completed and accurate before proceeding to the timesheet

![Key Date Image]

Personnel Selection

- Click on the **Personnel Selectn** pushbutton in order to select the appropriate employee(s)
- For one employee, enter their **Personnel Number** then click on the Execute icon in the Application Toolbar

![Personnel Selection Image]

- Multiple employee selection is possible, but will be covered in the **Selection Variants** unit.
Personnel Selection

- Click on the green Select All Persons icon in the Application Toolbar – OR – click on the gray box to the left of the Personnel Number column to select the employee

- Then click on the Enter Times (pencil) icon which will take you to the Time Sheet: Data Entry View screen

PMDAYCA Data Entry Profile

- Enter the required fields (☆), then click on the Save icon in the Standard Toolbar

Scroll 2 days before/after initial date

This profile allows you to enter for multiple employees for one day
PMDAYCA2 Data Entry Profile

• Enter the required fields ( ), then click on the Save icon in the Standard Toolbar

This profile allows you to enter for one employee only for one day

PMWEEKCA Data Entry Profile

• Enter the required fields ( ), then click on the Save icon in the Standard Toolbar

This profile allows you to enter for multiple employees for one pay period
**Activity Types**

- **ActTyp** = Planned rates from Order operation 0010
- Examples from Medical Center PPD:
  - LABOR – Building Maintenance Labor (Default)
  - LABOR2 – General Maintenance Labor
  - FURN – Furniture/Moving Crew Labor
  - DACESS – Door Access Labor
  - PAINT – Painting Labor
  - PEST – Pest Control Labor
  - CUSTOD – Custodial Labor
  - LOCK – Locksmith Labor
- **Activity** column value is 0010 and relates to operation 0010 on the Order – “Enter a sender” message will appear if omitted

**Attendance/Absence Types**

- Attendance/Absence Types are used to associate the type of compensation with the hours entered
- Specific for each employee based on their Organizational Assignment master data
- 1xxx = Attendance Types
- 3xxx = Shift Differential/On Call (Attendance Types)
- 7xxx = Absence Types (Vacation, TDL, FMLA, etc…)
- For example:
  - 1005 = Regular Hours Worked
  - 1007 = Break Time
  - 3311 = Diff Evening Shift
  - 7170 = Vacation
  - 7180 = Full Sal Sick (TDL) – Emp
Time Entry Options

• Total time spent on a work order may be entered for Campus PPD & Housing in the day’s date column (i.e. SU 03/19):

<table>
<thead>
<tr>
<th>MO</th>
<th>03/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:50</td>
<td></td>
</tr>
<tr>
<td>8:75</td>
<td></td>
</tr>
<tr>
<td>1:25</td>
<td></td>
</tr>
<tr>
<td>8:92</td>
<td></td>
</tr>
</tbody>
</table>

• Start and end times should be entered for Medical Center PPD in the From/To columns:

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00</td>
<td>08:45</td>
</tr>
<tr>
<td>08:45</td>
<td>15:20</td>
</tr>
<tr>
<td>15:20</td>
<td>15:50</td>
</tr>
</tbody>
</table>

• Entered in military time (i.e. 08:00–08:45, 15:20–15:50)

• The system will automatically calculate the total time and populate that value in the day’s date column

Hourly Overtime

• Any time the number of hours entered on a day exceeds the Target Hours, you will receive the following Warning message screen when you click on the Save icon

• If the hours entered are accurate, click on the Continue icon (green checkmark) to accept and save the data

Click on the Cancel icon to cancel the Save and return to the time sheet
Non-Work Order Time Entry

• Any time for which an employee should be paid that is not directly related to a work order (i.e. 15-minute break time or shop time)

• Enter only the PERNR, the appropriate Attendance/Absence Type, and the number of hours (or specific times)

• Time will be charged to the default cost distribution established for the employee in IRIS-HR

| PERNR | Name       | ActType | Recorder | Act... | WorkOrd | Plant | Work | Total | QU | CMRBF | From | To  | WD | OD | B3 | BR   |
|-------|------------|---------|----------|--------|---------|-------|------|-------|----|-------|------|----|----|----|----|-----|------|
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 0.75 | 0.75 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 1.00 | 1.00 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 0.25 | 0.25 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 4.17 | 4.17 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 0.83 | 0.83 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 0.50 | 0.50 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 4.50 | 4.50 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 0.25 | 0.25 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 2.00 | 2.00 | 0.00 | 60 | 60 | 60 | 45 |
| 17500 | Elise K. Wall | LABOR   | 00700808080808080801 | 0610 | IRASION | 005 | 0.83 | 0.83 | 0.00 | 60 | 60 | 60 | 45 |

Non-Work Order Attendance Types

• 1007 = Break time

• 1008 = Shop time or time worked that is not charged to a specific Order

• 1009 = Meeting and/or training time

• 1010 = Dispatch, office, administrative, or management time to be tracked (not directly associated with an Order)
Exception Time

• Exception Time is any time not considered as regular Hours Worked – mainly any type of leave/absence

• For example:
  • Vacation Leave
  • Temporary Disability Leave
  • Holiday/Bonus Day Leave
  • Funeral Leave
  • Military Leave
  • Family Medical Leave
  • Jury Duty

• This time must be entered on separate rows on the timesheet

Exception Time

• Enter the employee’s Personnel Number
• Enter the appropriate Absence Type
• Tab to the desired date and enter the number of hours
• Click on the Save icon in the Standard Toolbar

Use Possible Entries Icon to search for those A/A Types applicable to this employee
Insufficient Quota Message

- Received when you click on the Save icon and the employee does not have enough quota (Vacation, TDL, Holiday, or Military Leave) for the hours you have entered.
- You will need to make the appropriate adjustments to the entered time before the system will save the data.
- You will also receive this message when entering Vacation leave if an employee has not completed their orientation period, even though they have accrued Vacation quota – TDL and Holiday quota may be taken during this period.

University Differential Pay Rates

- The approved differential pay rates for the University are maintained in a table in IRIS.
- For example:
  - 3311 – Diff Evening Shift $0.75
  - 3312 – Diff Night Shift $1.25
- Enter the Personnel Number, appropriate Attendance Type, and number of hours.
Holiday Leave Time Entry

• Holiday leave is entered using Absence Type of 7150 on the date in which Holiday quota is used – whether it’s on the actual holiday or not – for both hourly and salaried employees.

• Examples of Holiday leave taken ON the actual holiday:

  • Hourly =

  • Salaried =

<table>
<thead>
<tr>
<th>Plant No.</th>
<th>Name</th>
<th>COAM/AH</th>
<th>Total</th>
<th>SU</th>
<th>MO</th>
<th>TU</th>
<th>WE</th>
<th>TH</th>
<th>FR</th>
</tr>
</thead>
<tbody>
<tr>
<td>15700</td>
<td>Yvette West</td>
<td>7150</td>
<td></td>
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<td>0</td>
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<td>0</td>
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<tr>
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<td>0</td>
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<td>0</td>
<td>0</td>
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<tr>
<td>15700</td>
<td>Yvette West</td>
<td>8000</td>
<td>7150</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Holiday Leave Time Entry

• If an hourly employee works on a holiday, that time is entered as if it were a regular work day with the appropriate Attendance Types as applicable.

• The day in which the hourly employee uses the Holiday quota is entered with Absence Type 7150.

• Hourly example:

<table>
<thead>
<tr>
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<th>Total</th>
<th>SU</th>
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<td>7150</td>
<td></td>
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<td>0</td>
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<td>0</td>
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<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
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<td>8000</td>
<td>7150</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

• If a salaried employee works on a holiday, nothing is done in CATS (the employee is automatically paid for that day).
Holiday Leave Time Entry

• If an hourly employee is not eligible for holiday leave and/or regular time pay ON a holiday, enter nothing on that day
  • Alternatively, for reporting purposes, you may use Absence Type 7420, Unpaid Leave, and the correct number of hours ON the actual holiday

• If a salaried employee is not eligible for holiday leave and/or regular time pay ON a holiday, you must use Absence Type 7420, Unpaid Leave, ON the actual holiday

Unit 1 Exercise

• Complete the following exercise:
  • 1.1 – CATS Time Entry
Time Entry Changes

- Follow the same steps used for normal time entry, making sure you indicate the correct Data Entry Profile and Key Date on the Initial Screen - then save your changes
- Time changes must also be approved and transferred
- IRIS will automatically adjust any pay/quota-related issues caused by the change
- If the “Payroll Correction Final Run” has already occurred, the adjustments will be on the next pay period’s pay stub/remuneration statement
- If changes are made in CAT2 after the time is transferred to PM (CAT9), the system will automatically cancel the existing confirmation in PM and create a new one with the changed information
  - This occurs because each confirmation in PM creates an actual Financial posting in IRIS

Unit 1 Summary

Any questions related to:
- Data Entry Profile
- Key Date
- Personnel Selection
- CAT2 Time Entry/Profiles
- Activity Types
- Attendance/Absence Types
- Exception Time
- Differential Pay Rates
- Holiday Leave Time Entry
- Time Entry Changes
Selection Variants

- Creating and saving a selection variant allows you to easily retrieve your group of employees.
- Employees are identified using various selection criteria (i.e. Personnel Number and/or Organization Unit, etc...).
- The selection criteria is then saved with a variant name, which is saved with your User ID.
- The variant is then retrieved by name – just as opening any other file on your computer.
- Multiple selection variants can be created in a transaction.
- A selection variant must be created in each transaction code in which it is needed.
Creating a CAT2 Variant

- Click on the **Personnel Selection** pushbutton in the lower-left corner of the **Time Sheet: Initial Screen**.
- Click on the Multiple Selection icon to the far-right of the **Personnel Number** field in the **Selection** section.

Enter the correct Personnel Numbers, one per line, using the **Possible Entries** icon to search if necessary.

When the Enter key is pressed, the tab will indicate the total number of numbers entered.

Click on the **Execute** icon to continue.

Values on the green light tabs are included – Values on the red light tabs are excluded – Best option is to use the green **Sngl Values** tab.
Searching for PERNRs

- Click on the **Multiple selection** pushbutton
- Select the **Organizational assignment** tab
- Enter the specific selection criteria to obtain the desired list of employees
- Press the Enter key
Importing PERNRs from External Application

• You can copy and paste a list of Personnel Numbers from an external application such as Excel

1. Select your data in the Excel spreadsheet and click on the Copy icon

2. Click on the Upload from clipboard icon in the IRIS window

Personnel Numbers are pasted in fields

Creating a CAT2 Variant

• The green light on the Multiple Selection icon indicates multiple values exist for the field the icon is next to, in this case the Personnel Number field

• Note: Only the first Personnel Number in the list will be displayed in the field

• Click on the Save icon in the Standard Toolbar to proceed
Creating a CAT2 Variant

• Three fields to complete: Variant name, Meaning, and click in the checkbox next to Protect variant

• Facts about the Variant name:
  • Must be unique in CAT2
  • Can contain special characters and spaces
  • Other users with security access to CAT2 and your employees may use your variant
  • Other users can change your variant, unless Protect variant is checked

Meaning is just a longer description of the variant, and is a required field

Creating a CAT2 Variant

• Click on the Save icon in the Standard Toolbar to completely save the selection variant

• System will display an informational message in the Status Bar upon completion

• The Personnel Number values will remain on the Personnel Number Selection for Fast Data Entry screen – So you can either:
  • Click on the Exit icon to leave the transaction,
  • Click on the Execute icon to proceed to the display screen,
  • Click on the Multiple Selection icon and add/remove Personnel Numbers – Be sure to Save after editing
Using a CAT2 Variant

- Click on the Get Variant icon in the Application Toolbar.
- Double-click on the desired selection variant.
- The saved values will automatically populate in the Personnel Number field.
- Click on the Execute icon.

Inserting Rows with Multiple Employees

- To give all employees an additional row at one time, click on the “LT” column header box to select that column, then click on the Target Hours icon.
Inserting Rows with Multiple Employees

Other insert options:

• Place cursor on any row for an employee and from the Menu Bar select Edit → Edit Rows → Insert Row

• OR Right-click on row and choose Insert Row from menu
• OR click on the employee’s name, then click on the Insert Row icon in the Application Toolbar

Unit 2 Exercises

• Complete the following exercises:
  • 2.1 – Creating a CAT2 Variant
  • 2.2 – Using a CAT2 Variant
Deleting a Variant

• From the Menu Bar on the Personnel Number Selection for Fast Data Entry screen select Goto → Variants → Delete

[Image of the Fast Data Entry screen showing Variants with a highlighted delete option, and a message box below indicating a system message in the Status Bar]

• Double-click on the variant to be deleted

Deleting a Variant

• Select Only in current clients and click on the Continue pushbutton

[Image of the Variants selection screen with a highlighted variant and a message box below indicating a system message in the Status Bar]

• Click on the Yes pushbutton to delete

[Image of the confirmation message box for deleting a variant]

• System message will appear in the Status Bar

[Image of the system message indicating a variant has been deleted]
Unit 2 Summary

Any questions related to:
• Creating a selection variant for CAT2
• Searching for PERNRs
• Importing PERNRs from an external application
• Using a CAT2 variant
• Inserting rows for multiple employees
• Deleting a variant

Unit 3

Time Approval & Transfers
**Time Approval**

- Time entered in CATS must be approved on-line

- Changes made to time after the initial approval must also be approved on-line

- Employees will not be paid for any time that has not been approved on-line

**Processing Status**

- Time is automatically “stamped” with a Processing status as different actions are performed in the system

- For example, the most commonly used are:
  - 20 – Time has been entered and saved in CAT2 and is now ready to be approved
  - 30 – Time has already been approved with CATS_APPR_LITE
  - 50 – Time was previously approved, but changes were made in CAT2 which has unapproved this time – the changes now need to be approved
Reporting Period

• There are several different options for the Reporting Period field in the approval transaction:
  • All, Other Period, Current/Other Payroll Period, Etc…
• These options also work hand-in-hand with the Processing Status values
  • The All option is the most preferred and is not pay period-specific
    ▪ For example: If the Processing Status is 20 (Released for approval), only time that needs approval will display, whether it’s in the current pay period or not – this will also capture any retro changes that you may have made to prior pay period time
  ▪ If the Processing Status is a range from 20 to 60, ALL time for an employee will display, whether it needs approval, has been approved, has been changed since approval, etc…

Time Approval

• Enter T-code CATS_APPR_LITE
• Reporting Period should be All
• Enter the Personnel Number(s)
• Ensure Processing Status is 20
• Click on the Save icon to save as a variant
• Click on the Execute icon

Use the Multiple Selection icon to enter/import/search for multiple PERNRs
Time Approval

- Select all rows to be approved by clicking on first row to select then press the Ctrl + A keys on your keyboard
- Click on the Approve icon in the Application Toolbar

<table>
<thead>
<tr>
<th>Name</th>
<th>Plant No.</th>
<th>Date</th>
<th>Status Bar</th>
<th>Status Column Icon Changes</th>
<th>Activity Description</th>
<th>Time</th>
<th>Activity Type</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elise K. Weber</td>
<td>15536</td>
<td>3/29/2007</td>
<td></td>
<td></td>
<td>Replace 20 lighbulb</td>
<td>0.75</td>
<td>LABOR</td>
<td>10.35</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Repair door hinge</td>
<td>1.25</td>
<td>LABOR</td>
<td>10.35</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Fix meter is off wall</td>
<td>0.42</td>
<td>LABOR</td>
<td>10.35</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Hang new whiteboards &amp; screen</td>
<td>0.83</td>
<td>LABOR</td>
<td>10.35</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Replace 20 lighbulb</td>
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<td>0.83</td>
<td>LABOR</td>
<td>10.35</td>
</tr>
</tbody>
</table>

Time Approval

- Status Bar displays →✓ Work times / key figures were approved
- Status column icon changes to →✓

- Changes to approved time will display as follows:
Unit 3 Exercise

• Complete the following exercise:
  • 3.1 – Time Approval

Time Transfer

• After time data has been entered and approved in CATS, it must be transferred to:
  • IRIS–HR for Time Evaluation and payroll processing
  • IRIS–Plant Maintenance (PM) in order to populate the actual PM Order Confirmation(s) and post the financial cost allocations
Time Transfer to IRIS–HR

- Enter transaction code ZCAT6
- Enter the Personnel Number(s)
- Click on the Execute icon

Use the Multiple Selection icon to enter/import/search for multiple PERNRs

Save as a variant

Time Transfer to IRIS–HR

- Be patient with this process – It may take a few seconds to complete the transfer
- Ideal scenario is to have matching totals in the Number of data records read and Number of successful postings lines – If so, this process is complete – Exit the transaction
Time Transfer to IRIS–HR with Errors

• Any unsuccessful postings will need to be corrected in CAT2 – then also approved and transferred.

On 03/20/2006 both 1005 and 7170 time were entered – All other days with a “green light” did transfer!

• Bad cost allocation, collision with time already in Infotypes 2001/2002, or (as in the example above) conflicting time entries on the say date are just a few of the possible reasons for an unsuccessful transfer.

Unit 3 Exercise

• Complete the following exercise:
  • 3.2 – Time Transfer to IRIS–HR
Verifying Transferred Time – ZVERXFER

Enter data in all three sections – Click on the Execute icon to generate the report

Verifying Transferred Time

- Time not transferred will be listed first
- Two reasons for a “No” transfer:
  - No corresponding record in IRIS for the Attendance or Absence code on the date in question
  - There is a corresponding record, but the hours do not match
Time Transfer to IRIS–Plant Maintenance

- Enter transaction code CAT9
- Enter the Personnel Number(s)
- Click on the Execute icon

Select Test run 1st to check for errors

Use the Multiple Selection icon to enter/import/search for multiple PERNRs

Save as a variant
Unit 3 Exercise

- Complete the following exercise:
  - 3.3 – Time Transfer to IRIS–PM
**PM Order Confirmation (Time) Processing**

1. Time is entered in CATS: **CAT2 or IW44 (STEPS)**
2. Time is approved in CATS: **CATS_APPR_LITE**
3. Time is transferred from CATS to IRIS: **ZCAT6**
4. Time is transferred from CATS to PM: **CAT9**
5. Time can be displayed: **CATS_DA & IW43**

---

**Unit 3 Summary**

Any questions related to:
- Time Approval
- Processing Status field
- Reporting Period field
- Time Transfer to IRIS–HR
- Time Transfer to IRIS–Plant Maintenance
Unit 4

PM Direct Time Entry (STEPS)

PM Order Confirmation – IW44

• Collective method of capturing the time worked against existing Work Orders - mainly by STEPS employees
• Time is entered using the following required fields:
  • Posting Date – Date on which the confirmation (of time entry) is posted – The system defaults to the current date
  • Personnel Number – Unique IRIS–HR number for an employee
  • Order – The Work Order number for the time being entered
  • Actual Work – Total amount of time spent on Order
  • Start/End Dates – Start and end dates of the work

• Optional fields – for informational purposes only:
  • Start/End Times – Start/End times of the work in military time
  • Notes – Any comments noted on the Work Order
PM Order Confirmation – IW44

• Default Values Line

  • The values entered (or defaulted) in this line will be copied to each line in the section below (upon pressing the Enter key) – thus becoming the default values for each line and reducing the amount of data entry required

  • Example of the initial screen upon entering the transaction:

```
PM Order Confirmation: Collective Confirmation

<table>
<thead>
<tr>
<th>Order</th>
<th>Operation</th>
<th>Work.Ctr</th>
<th>Plant</th>
<th>Activity Type</th>
<th>Posting Date</th>
<th>Persons No.</th>
<th>Start Date</th>
<th>Start Time</th>
<th>End Date</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

PM Order Confirmation – IW44

• Example: Today is June 7th, and you wish to enter Work Order times for Personnel Number 24503 for June 6th:

```
Order | Operation | Work.Ctr | Plant | Activity Type | Posting Date | Persons No. | Start Date | Start Time | End Date | End Time |
-----|-----------|----------|-------|---------------|--------------|-------------|------------|------------|----------|----------|
0010  |           |          |       |               |              |             | 06/07/2007 | 00:00:00   |          |          |
0010  |           |          |       |               |              |             | 06/07/2007 | 00:00:00   |          |          |
0010  |           |          |       |               |              |             | 06/07/2007 | 00:00:00   |          |          |
```

• Example continued: Three Work Orders are entered with 1.25 hours each – Only the Order and Act. Work fields needed to be completed – All other data is from either the Default Values line or is derived from the Work Order

```
Order | Operation | Work.Ctr | Plant | Activity Type | Posting Date | Persons No. | Start Date | Start Time | End Date | End Time |
-----|-----------|----------|-------|---------------|--------------|-------------|------------|------------|----------|----------|
0010  | 1.25      |          |       |               |              |             | 06/07/2007 | 00:00:00   |          |          |
0010  | 1.25      |          |       |               |              |             | 06/07/2007 | 00:00:00   |          |          |
0010  | 1.25      |          |       |               |              |             | 06/07/2007 | 00:00:00   |          |          |
```
Cancel PM Order Confirmation – IW45

• Once an order confirmation is saved, it becomes an actual financial posting for cost allocation purposes

• If a confirmation must be changed for any reason, it must first be cancelled and then a new confirmation entered

• Use transaction code **IW45** to cancel a confirmation

Enter **Order** number and press the Enter icon/key

Cancel PM Order Confirmation – IW45

• If only ONE confirmation exists for the Order, the **Actual data** screen for the confirmation will appear

• Click on the Save icon in the Standard Toolbar to initiate the Cancel action
Cancel PM Order Confirmation – IW45

- The “Reason for cancellation” screen appears and allows you to enter unlimited text
  - You can also insert text from external sources if necessary
- Click on the Back icon in the Standard Toolbar when finished

- In the Status Bar, the system will confirm cancellation

---

Cancel PM Order Confirmation – IW45

- If MULTIPLE confirmations exist for the Order, process as follows:
  - Click on Yes
  - Click on gray box to the far-left of the confirmation to be cancelled
  - Click on the Actual data icon in the Application Toolbar
Cancel PM Order Confirmation – IW45

• The Actual data screen for the selected confirmation will display to allow for final verification that this is the correct confirmation to be cancelled

• Click on the Save icon in the Standard Toolbar

![Image of Actual data screen]

Cancel PM Order Confirmation – IW45

• Enter a Reason for cancellation

• Click on the Back icon when finished

![Image of Reason text]

• In the Status Bar, the system will confirm cancellation

![Image of confirmation text]
Displaying Cancelled Confirmations – IW43

- The checkmark in the “C” column indicates the cancelled confirmation
- Double-click on line to view the confirmation

```
Display PM Order Confirmation: Confirmation Overview

Order: 687788688221 Replace 20 lightbulbs

<table>
<thead>
<tr>
<th>#</th>
<th>Status</th>
<th>Ty</th>
<th>Top</th>
<th>Conf</th>
<th>PMR</th>
<th>PMR Description</th>
<th>Wk</th>
<th>Act Wkr</th>
<th>Unit</th>
<th>Qty</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Replace 20 lightbulbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Replace 20 lightbulbs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reason for cancellation: 
```

- Click on the Text icon to see the “Reason for cancellation” text

Unit 4 Summary

Any questions related to:
- Entering PM Order Confirmations
- Cancelling a PM Order Confirmation
Displaying Time in CATS

- Enter transaction code CATS_DA
- Select the desired Payroll Period
- Enter the Personnel Number(s)
- Select appropriate Processing Status
- Click on the Execute icon

Save as a variant

Use the Multiple Selection icon to enter/import/search for multiple PERNRs
**Displaying Time in CATS**

- Icons in the Application Toolbar allow for further manipulation of the data seen in a report.

<table>
<thead>
<tr>
<th>Name</th>
<th>From / To Date</th>
<th>Task Description</th>
<th>Planned / Actual Hours</th>
<th>Start Time / End Time</th>
<th>Area Type / Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>01/01/2023</td>
<td>Repair door hinge</td>
<td>1.50</td>
<td>09:00 - 10:00</td>
<td>LABR / 1000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Replace light bulb</td>
<td>0.20</td>
<td>10:00 - 10:20</td>
<td>LABR / 1000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Replace light bulb</td>
<td>0.10</td>
<td>10:20 - 10:30</td>
<td>LABR / 1000</td>
</tr>
</tbody>
</table>

**Unit 5 Exercise**

- Complete the following exercise:
  
  5.1 – Displaying Time in CATS
Displaying PM Order Confirmations

- Enter transaction code IW43
- Enter the Order number or use the Possible Entries icon to search
- Press the Enter icon/key

If only one confirmation exists, it will automatically display the Actual data screen.
Displaying PM Order Confirmations

- Screen below will appear first if multiple confirmations exist for a Work Order:


display PM Order Confirmation: Confirmation Overview

<table>
<thead>
<tr>
<th>Order</th>
<th>0001000002</th>
<th>Integrated test order</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Conf #</th>
<th>Bu</th>
<th>Ty</th>
<th>Sp Cost</th>
<th>CIP/Ct</th>
<th>Op</th>
<th>Mnt</th>
<th>Ctn</th>
<th>Description</th>
<th>Ty</th>
<th>Actual Start</th>
<th>Act End</th>
</tr>
</thead>
<tbody>
<tr>
<td>0010</td>
<td>1</td>
<td>1</td>
<td>203706</td>
<td>ELECT</td>
<td>0</td>
<td>0.68</td>
<td>ELECT</td>
<td></td>
<td></td>
<td>130706</td>
<td></td>
</tr>
</tbody>
</table>

- Click on the gray box to the far-left of a line to select, then click on the Actual Data icon

Actual Data

| Work Center | ELECTRIC | MP#6 Electrical Shop |

Confirmation #

Click Next icon

Click PM Order Confirmation

* Display PM Order Confirmation

<table>
<thead>
<tr>
<th>Order</th>
<th>0001000002</th>
<th>Integrated test order</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Conf #</th>
<th>Bu</th>
<th>Ty</th>
<th>Sp Cost</th>
<th>CIP/Ct</th>
<th>Op</th>
<th>Mnt</th>
<th>Ctn</th>
<th>Description</th>
<th>Ty</th>
<th>Actual Start</th>
<th>Act End</th>
</tr>
</thead>
<tbody>
<tr>
<td>0010</td>
<td>1</td>
<td>1</td>
<td>203706</td>
<td>ELECT</td>
<td>0</td>
<td>0.68</td>
<td>ELECT</td>
<td></td>
<td></td>
<td>130706</td>
<td></td>
</tr>
</tbody>
</table>

Click Next icon

* Display PM Order Confirmation

<table>
<thead>
<tr>
<th>Order</th>
<th>0001000002</th>
<th>Integrated test order</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Conf #</th>
<th>Bu</th>
<th>Ty</th>
<th>Sp Cost</th>
<th>CIP/Ct</th>
<th>Op</th>
<th>Mnt</th>
<th>Ctn</th>
<th>Description</th>
<th>Ty</th>
<th>Actual Start</th>
<th>Act End</th>
</tr>
</thead>
<tbody>
<tr>
<td>0010</td>
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<td>1</td>
<td>203706</td>
<td>ELECT</td>
<td>0</td>
<td>0.68</td>
<td>ELECT</td>
<td></td>
<td></td>
<td>130706</td>
<td></td>
</tr>
</tbody>
</table>
Unit 5 Exercise

- Complete the following exercise:
  - 5.2 – Displaying PM Order Confirmations

Display Confirmation from a List

- Enter transaction code IW47
- Verify the Order status options and enter any other search criteria as desired
- Check the Entered on and/or Posting Date fields – edit if necessary
- Click on the Execute icon to generate the list of confirmations
Display Confirmation from a List

• Double-click on the gray select box to the far-left of the confirmation you wish to display

<table>
<thead>
<tr>
<th>Confirmation</th>
<th>Created on</th>
<th>Created by</th>
<th>Order</th>
<th>Completion confirmation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1366</td>
<td>1/12/2006</td>
<td>UCHASE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Unit 5 Exercise

• Complete the following exercise:
  • 5.3 – Display Confirmation from a List
Unit 5 Summary

Any questions related to:
• Displaying time in CATS
• Displaying PM order confirmations

Course Summary

You should now be able to:
• Understand the entire Plant Maintenance (PM) work order time entry process
• Enter, edit, approve, transfer, and display work order time in CATS
• Create and save selection variants
• Enter, edit and display work order time in Plant Maintenance
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