Work Order Processing PM_WO_300

IRIS
Integrated Resource
Information System

Use the **forward** button below ( ) to advance through the slides.

Prerequisites and Roles

IRIS

- Prerequisite
  - UK_100 IRIS Awareness & Navigation
    - If you have not completed UK_100, please do so prior to taking this course.
- Roles
  - This course is primarily intended for all Plant Maintenance managers, supervisors, and workers who will process work orders will take this class.

Work Order Processing PM_WO_300

Course Content

- Setting the Training Environment – Activating GUI-XT
- Unit 1 – Work Planning Overview
- Unit 2 – Work Orders Overview
- Unit 3 – Creating a Work Order
- Unit 4 – Changing Work Orders
- Unit 5 – PM Materials
- Unit 6 – Work Order List Displays

Course Assessment

- There are **two** parts to the Work Order Processing assessment which must be completed underlineunderline{successfully} prior to receiving credit for this course.

- **Part 1 – Check for Understanding:** This is a series of questions which will be presented at the end of each unit. To complete:
    1. Click on the radio button next to your answer ⊙ is the easie
    2. Click on the **Next** button NEXT ▶
    3. Repeat Steps 1 & 2 for each question
    4. After answering all of the questions, click on the **Submit All** SUBMIT ALL or **Submit All Answers** Submit All Answers button
    5. Upon passing, click on the **Finish** button to continue to the next unit in the course Finish

Work Order Processing PM_WO_300

Course Assessment (Continued)

- **Part 2 – Work Order Processing Assessment:** This is the hands-on portion of the assessment which you will perform in the Training Sandbox. Further information on this part of the assessment will be given to you at the very end of this course.

## Work Order Processing Practice Guide

- As noted at various points in this course, the Work Order Processing Practice Guide is available should you want to practice the various transactions discussed in this course.
- **The guide is underlined optional and not a requirement for completing this course.**
- To access the guide:
    1. Click on the **Attachments** link (ATTACHMENTS) in the upper-right corner of this screen
    2. Click on the **Work Order Processing Practice Guide** link (the guide will open in a separate browser window)
    3. Print the guide
   4. Follow the instructions listed in each exercise

Work Order Processing PM_WO_300

Work Order Processing Training Environment

Plant Maintenance uses a GuiXT (graphical user interface) that changes the look of the IRIS/SAP screens. On the Main Menu screen it adds push buttons on the left side of the screen. You can use these buttons to get to various transactions once your training is complete but during training please do not use the push buttons to navigate to the various transactions we will use.
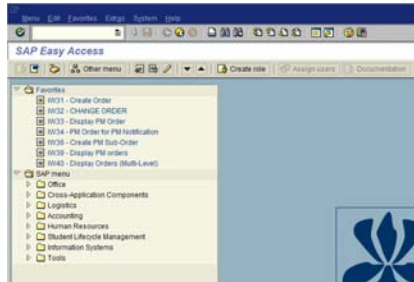
Main Menu screen without the GuiXT activated
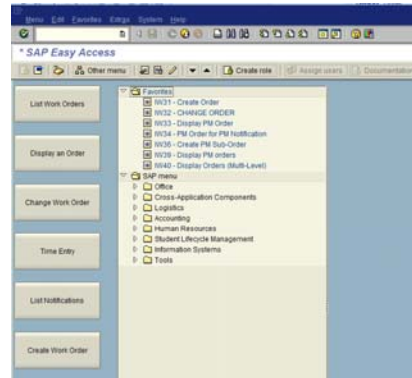
Main Menu screen with the GuiXT activated
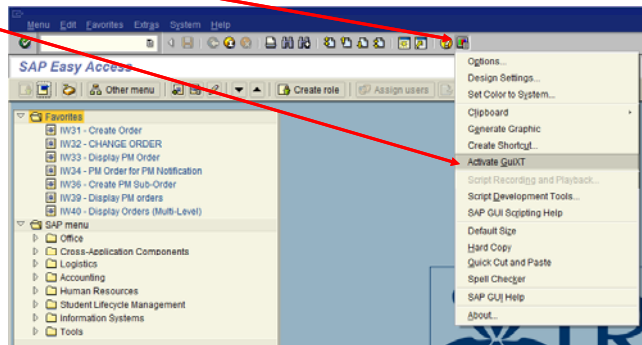
GuiXT Activation

If your screen does not show the push buttons on the left side of the screen you will need to activate the GuiXT by following these steps:

Click on the **Customize Local Layout** icon on the standard toolbar.

Click **Activate GuiXT**

Press **Enter**

This will activate the GuiXT and your screen should now show buttons on the left side of the screen.

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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

Unit 1

Work Planning Overview

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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 4 main Planning Plants:
    - Main Campus PPD (CPPD),
    - Medical Center PPD (MPPD), and
    - Housing (HOUS)
    - Capital Project Management Division (CMPD)
  - Work groups are grouped by plant

Functional Locations

- The Functional Location identifies the physical location of a building, room, elevator, stairway, equipment, etc.

- The Structure of the Functional Location is as follows:
  - The first level would be the "campus" (LX-)
  - The next level is the building (LX-xxxx)
  - The next level is the floor (LX-xxxx-xx)
  - The next level is the room (LX-xxxx-xx-xxx)
  - There is a separate structure for **Grounds** (exterior space)

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Functional Location Structure - Example

- Click though the following example to see how a location, room 72 in McVey Hall, is identified by the functional location.

- The Building: LX-0045
  McVey Hall
- The Floor: LX-0045-00
  McVey Hall, basement,
- The Room: LX-0045-00-72
  McVey Hall, basement, room 72

How Functional Locations are Used

- Maintenance repairs and work requests are written referencing the functional locations.
- Work orders may be listed by functional location or rolled up to the organizational area (CPPD, MPPD, HOUS, CMPD).
- Accounting information for chargeback is automatically assigned to the work order from the functional location. (This may be overridden if required.)
- Statistical reporting will provide summary work order counts and costs at the functional location or the organizational level(s) above it.
- Equipment may be assigned to a functional location.

Unit 1
Check for Understanding

Unit 2

Work Orders Overview

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What is a Work Order?

- A work order is 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
- A Work Order may be created **from** a Notification or **without** an existing Notification
- Multiple Notifications can be turned into **ONE** Work Order

Why are Work Orders used?

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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

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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.

Required Information on a Work Order

- **Order Type** - A four-character code used to distinguish the different work order types.
  - Examples: REPR = Corrective Repair; RENV = Renovation

- **Priority** - An indicator of when this work should be scheduled.
  - Examples: Daily Operations; Emergency

- **Object to be maintained –** Functional Location or Equipment
  - **Functional Location** - Place where the work is to be performed; i.e., a building, floor, room, or exterior (Grounds)
    - Example: LX-0030-01-104 = 104 Student Center (0030=Student Center, 01=First Floor, 104=Room 104)
  - **Equipment –**Can be located at a Functional Location
    - Example: H-222 Ice Maker

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Optional Information on a Work Order

- **Description** – Text describing the work that is to be done; this can include "long text" of unlimited length
    - Examples: Repair thermostat; Fix broken window

- **Work Duration** – Number of hours of planned labor
    - Example: 2 H (2 hours)

- **Main Work Center** = 2 fields
    - Field 1 - **Initially created "Unassigned"** – but could be changed to the Work Center or individual responsible for maintaining the order, equipment, etc. -
    - Field 2 - The responsible planning plant - based on the Functional Location.

Other Work Order Information

- **Person Assigned** – could be someone with a specialty in a certain area

- **Materials** – parts and supplies needed to perform the work
    - Planned labor and materials
    - Actual labor and materials costs

- **Special Conditions –** Examples: may have to wait to do work when patient leaves Hospital room or when students leave residence hall, or may be hazardous materials in the area

Many of these items are added later as additional planning is performed for more complex work orders.

Unit 2
Check for Understanding

Exercise 1

To set up your PC to practice the transaction(s) discussed in this course, refer to:

Exercise 1 – Preparing to Use the IRIS Training Sandbox

as detailed in the PM_WO_300 Practice Guide.

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To practice the transaction(s) discussed in this unit, refer to:

Exercise 2 – Display a Work Order – IW33

as detailed in the PM_WO_300 Practice Guide.

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Unit 3

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Creating a Work Order

UK UNIVERSITY OF KENTUCKY | Work Order Processing PM_WO_300_LSO_v1 | 26

Work Order Processing PM_WO_300

Creating Work Orders

Work Orders can be created in a number of ways.

They can be created:

- Directly using Transaction code IW31
- Directly from a Notification with Transaction code IW22
- Using a Notification with Transaction code IW34
- Using more than one Notifications with Transaction code IW34

Create a Work Order – Transaction Code IW31

There are 3 required fields on the Create Work Order Initial screen:

- Order Type

- Priority

- Functional Location or Equipment

You can type entries directly into the fields or select them from possible entries.
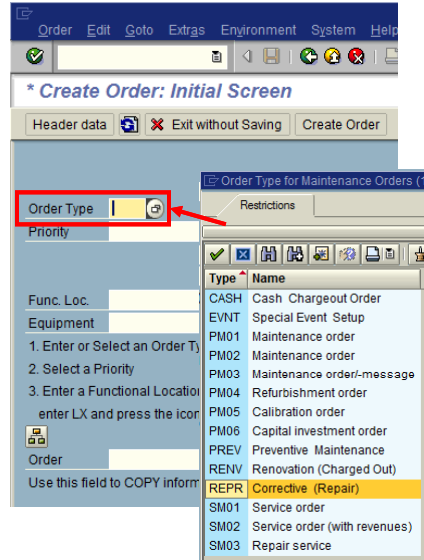
Work Order Processing PM_WO_300

Work Order – Order Types

Enter the Order Type or select one by clicking on the Possible Entries icon.

From the list of possible Order Types, double-click on the one you want to use.

Notice that the last entry in the Possible Entries list is labeled Type SM03 – Repair Service but Type **REPR – Corrective (Repair)** is the correct one to used.

* Create Order: Initial Screen

Header data | Exit without Saving | Create Order

Order Type
Priority

Func. Loc.
Equipment
1. Enter or Select an Order Ty
2. Select a Priority
3. Enter a Functional Location
   enter LX and press the icon

Order
Use this field to COPY inform

Order Type for Maintenance Orders (1)
Restrictions

Type	Name
CASH	Cash Chargeout Order
EVNT	Special Event Setup
PM01	Maintenance order
PM02	Maintenance order
PM03	Maintenance order/-message
PM04	Refurbishment order
PM05	Calibration order
PM06	Capital investment order
PREV	Preventive Maintenance
RENV	Renovation (Charged Out)
REPR	Corrective (Repair)
SM01	Service order
SM02	Service order (with revenues)
SM03	Repair service

Work Order Types and Examples

The table below shows the five Order Types used and an example of each

Type	Description
CASH	Cash Charge out Order Example: Fraternity Work
EVNT	Special Event Example: Commencement
PREV	Preventive Maintenance Example: Oil HVAC regularly
RENV	Renovation (Charged Out) Example: Install new bathroom
REPR	Corrective (Repair) Example: Repair hinge on door

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Priority

To enter the Priority, click on the drop-down icon 📄 in the Priority field to see the available choices.

Each priority has a specified time span for the work. The time span indicates when the work needs to be performed and is incorporated in the Work Order.

Select the appropriate priority.

Order Type   REPR
Priority
      D Daily Operations
      E Emergency
Func. Loc. F Research Fac
Equipment G General Maint
1. Enter or Se P Patient Care RENV, etc.)
2. Select a Pri R Renovations
3. Enter a Fun S Scheduled Maint ot known,
   enter LX an X Elective Improv

Order
Use this field to COPY information from an existing order.

Priority and Time Spans for Work Orders

The table below shows the start and end times for various priorities for all the areas in Facilities.

Description	Start	End
Emergency	10 Min	24 Hours
General Maint.	7 Days	30 Days
Schedulable Maint.	7 Days	30 Days
Daily Operations	1 Day	2 Days
Research Fac.	1 Hour	4 Hours
Patient Care	1 Hour	4 Hours
Elect. Improv.	3 Days	10 Days
Renovations	-	-

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Functional Location

If you know the Functional Location you can enter it directly into the field.

If you do not know the Functional
Location, you can either click on the:
- Possible Entries icon, or
- Structural List icon
to search for it search.

We will cover both methods.

Click on the Possible Entries icon.

Order Type	REPR
Priority	D Daily Operations

Func. Loc.
Equipment
1. Enter or Select an Order Type (REPR, RENV, etc.)
2. Select a Priority
3. Enter a Functional Location. If this is not known,
   enter LX and press the icon below.

Order
Use this field to COPY information from an existing order.

Functional Location Possible Entries

Functional Location (1)

| Asset | Cost center | Uppermost FunctLocs by StructIndicator |

Asset
Subnumber
Company Code   UK00
Functional Location

Maximum No. of Hits   500

The Possible Entries function is used throughout SAP to search for what could
"*possibly go into*" a particular field. It is a very valuable and helpful technique to
understand.
The first time you click on Possible Entries from any field, the Functional Location
search box will appear. If it is a tab format, it will open to the first tab. It does this
because it does not know yet how you like to search from that particular field.
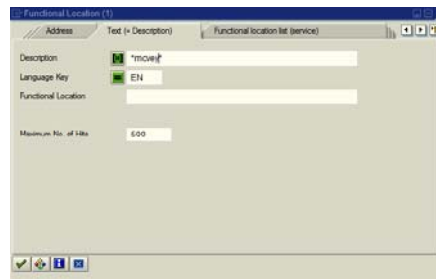
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Functional Location Possible Entries (con't)
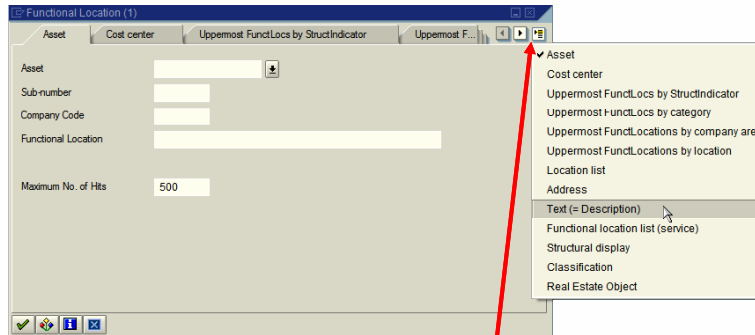
The easiest way to change tabs is to click on the tab list icon. This shows you all the tabs that are available. You simply click on the tab you want.

Click on the Text (= Description) tab.

Search with Possible Entries

Now that you are on the Text (= Description) tab, enter your search text in the Description field.
Remember to use the asterisk (*) as the wildcard character to expand your search criteria and since you do not know how entries will be listed, it is best to start with asterisks on each side of the entry…Example: You need the Functional Location for 72 McVey Hall. Enter *mcvey* for McVey Hall.
Do not use any spaces since they will become part of your search criteria.
Once your search criteria is entered press the Enter key.

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Possible Entries Results

The Functional Locations that match your query will be displayed and the results are always sorted by the first column. In the example all locations with mcvey in the description are shown.

If you need to tweak your search criteria to either expand or reduce the number of entries found, click the bar under the tab headings.

The original search criteria will be displayed and can be changed.

After you press enter the new results will be displayed.
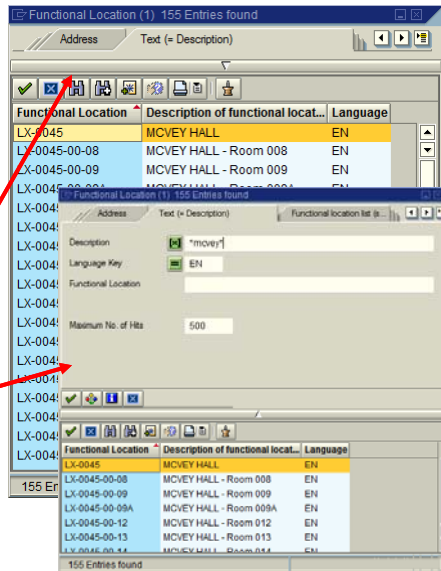
Possible Entries Results (con't)

In this example you needed the Functional Location for 72 McVey Hall.

When you locate the Functional Location you need, double-click on it to populate the Functional Location field on the Create Work Order screen.
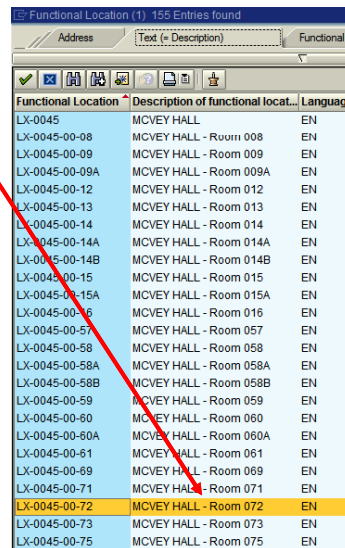
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Functional Location Structure List

Another method to search for a Functional Location is the Structure List.
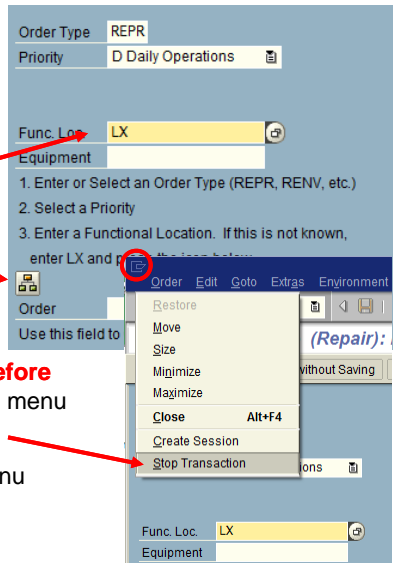
To see the **complete** Functional Location Structure, *enter LX first* and **then click** the Structure List **icon**

The list will take a while to open.

NOTE: If you click the Structure List icon **before** you enter lx in the field, click the application menu to open it and then click **Stop Transaction**.

This will take you back to the main SAP Menu screen and you will need to start over.

Create Order: Structure List

Once the Structure List appears you will be able to see all Functional Locations and Equipment Locations.
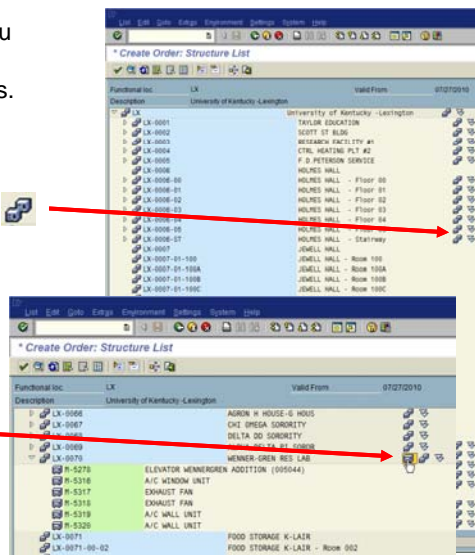
You can expand and collapse locations as needed by clicking the triangles or the FunctLocation icon

You can expand and collapse equipment as needed by clicking the equipment icon

Clicking the double arrows shows all objects.

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Create a Work Order – IW31

Once the 3 required fields are complete

Press Enter

* Create Order: 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, RENV, etc.)
2. Select a Priority
3. Enter a Functional Location. If this is not known,
   enter LX and press the icon below.

Order
Use this field to COPY information from an existing order.

Multiple Work Orders for Functional Location

If there have been **3 or more** work orders for this functional location during the **previous 12 months**, the Object Information box appears.

This is an informational notice only and alerts the user that there might be a recurring problem and that proactive action might be taken when time permits.

Press Enter to close this notice and proceed to the work order screen.

Object Information

Reference | Obj.display | Environment
Doc... | Sched. | Mnt...

Select.indic.since 07/2009   Select.notif.since 07/27/2009
BrkdnReptd   0   ProcssDays   0   IS
NotifCreat   0   CompNotif   0   Notif
OrdsCrtd   0   Compl.ords   0   Order

Description   Date   Completion P
Repair broken south window   03/29/2007   D
Repair broken south window   03/29/2007   D
Repair broken south window   03/29/2007

Last Active Order
Description   Repair broken south window
Bas. start date 03/30/2007
Basic fin. date 03/31/2007
Priority   D

Maintenance items | Link from/to | Link object | Replacement Equipment

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Anatomy of a Work Order

Save · Save and Exit · Release and Save · Description · Order Type/Number · Main Work Center · Basic start and end times · Functional Location · Priority · To add more detail to the description · Work Center Plant · Planned Labor Required

Work Order Processing PM_WO_300_LSO_v1   43

Create a Work Order – Description

In this unit you will only enter a short description and planned labor.

Enter a description of the work.

To add more detail, click on the **Create Text** icon.

Work Order Processing PM_WO_300_LSO_v1   44

Work Order Processing PM_WO_300

Create a Work Order – Planned Labor

For planning purposes it is suggested that you enter an estimate of the labor time required. 2 hours were entered on this order.

After entering planning time, click either on the **Save** icon or the **Save and Exit** push button to save the order.

Work Order Number

The 12 digit Work Order number is displayed in the lower-left corner of the screen. As soon as you click somewhere the number will disappear.

Only REPR (Corrective Repair) Work Orders are saved with a notification number (background system "paperwork")

Order 807000000164 saved with notification 10000212

All other Work Orders are saved without a notification number.

Order 807000000164 saved

Until the Work Order is released it can not be worked and any components will not be staged or ordered.

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Notifications and Work Orders

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- A Notification is a **non-financial transaction** that is used to report a problem, request work, or record an event or activity. It is purely **informational** in nature.

- A Work Order is a **financial** and **work management transaction** that is used to **plan** and **charge** labor, stock materials, non-stock purchases, and services.

- Not all areas in Facilities use Notifications.

A notification is typically the what, where, and contact info.

Create Work Order from Notification – IW34

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- A Work Order can be created from an existing Notification by using transaction code IW34.

- This function can be used after looking at a list of Notifications to create an order to do the work.

- One Work Order can be created for multiple Notifications. For example, if 10 Notifications are received for the same power outage, only one Work Order is really needed.

- To create a work order from a notification using IW34 the following information is required:

  - **Order Type** – A four-character code used to describe an order type
  - **Priority** – Indicates when the work should be scheduled
  - **Notification** (number) – The number assigned to the notification by the system when the notification was created

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Required Fields – IW34

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

Type the Notification number in the Notification field. If you do not know the number, click on the Possible Entries icon to search for it.

Click the drop-down icon in the Priority field to see the choices, and then click on the one you want.

Work Order Created from Notification – IW34

When all the required fields are complete, press the Enter key or click on the Enter icon and the Work Order is created.

No matter how a Work Order is created…
A Work Order is a Work Order.

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Create Work Order Directly from Notification – IW22

On IW22 type the Notification number in the Notification field.

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

When the Notification appears click the Create Order icon

Enter the Order Type on the Create Order dialog box that appears and press Enter.

Work Order Processing PM_WO_300_LSO_v1   51

Work Order Created Directly from Notification – IW22

If an Object Information box appears, just press Enter to get to the Work Order.

No matter how a Work Order is created…
A Work Order is a Work Order.

Work Order Processing PM_WO_300_LSO_v1   52

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Creating a Sub-order – IW36

- Sub-orders are typically used to break a project into units by craft or shop. Each shop can estimate its costs on a sub-order and these can be tracked at the sub-order and superior order level.
- A sub-order is a work order that has a link to a "superior" order.
- The actual costs of sub-orders may be viewed from the "superior" order
- The costs of the sub-orders may either settle to the superior order or directly to another cost object.
- Sub-orders may have sub-orders.
- To create a sub-order, a work order needs to be identified as the superior work order.

Create Sub-order – IW36

Using IW36 enter the:

• Order Type

• Priority

• In the Superior Order field enter the work order number for the work order that will be identified as the superior work order.

Order Edit Goto Extras Environment System

* Create Sub-order: Initial Screen

Header data

Order Type	RENV
Priority	R Renovations
Superior order	807000000164

Reference

Order

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Sub-order Created

* Create Renovation (Charged Out) : Central Header

The sub-order is created.

The only difference between a work order and a sub-order is the sub-order has a link to the superior work order.

Order   RENV %00000000001   McVey Renovation - Audio/Visual work
Sys.Status   CRTD MANC NTUP   NEW

HeaderData | Operations | Components | Costs | Objects | UK Fields

SuperOrder   807000000164   McVey Renovation
                                                    Notifctn
PlannerGrp   / UK10   USD
Mn.wk.ctr   UNASSIGN / CPPD   PPD - Unassigne...   PMActType
Bsc start   03/17/2007   Priority   R Renovations
Basic fin.   03/18/2007
Func. Loc.   LX-0045-00-72   MCVEY HALL - Room 072
Equipment

First operation
Operation
WkCtr/Plnt   UNASSIGN / CPPD   Ctrl key   PM01   Acty Type   LABOR
Labor Reqd   H   Number   Comp.
Person. no

No matter how a Work Order is created…
A Work Order is a Work Order.

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Superior and Sub-order Links

* Create Renovation (Charged Out): Central Header

The superior work order has a link that will show all the sub-orders under it. Click the icon to show the sub-orders.

Order: RENV 807000000164   McVey Renovation
Sys.Status   CRTD MANC NMAT NTUP PRC   NEW

HeaderData | Operations | Components | Costs | Objects | UK Fields

* Order List (Multi-Level): List of Orders

Whole

▽ 807000000164 REPR McVey Renovation CRTD MANC NMAT NTUP PRC
   807000000166 RENV McVey Renovation - Electrical work   CRTD
   807000000105 RENV McVey Renovation - Carpentry work   CRTD
   807000000106 RENV McVey Renovation - Plumbing work   CRTD
   807000000107 RENV McVey Renovation - Audio/Visual work CRTD

Double-clicking a sub-order will display the sub-order.

All sub-orders have a link to their superior work order.

A sub-order can also be a superior order. It will have links to both the superior order and the sub-orders.

* Create Renovation (Charged Out) : Central Header

Order   RENV %00000000001   McVey Renovation - Audio/Visual work
Sys.Status   CRTD MANC NTUP   NEW

HeaderData | Operations | Components | Costs | Objects | UK Fields

SuperOrder   807000000164   McVey Renovation
                                                    Notifctn

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Unit 3
Check for Understanding

Work Order Processing PM_WO_300_LSO_v1   57

Exercise 3

To practice the transaction(s) discussed in this unit, refer to:
Exercise 3 – Create a Work Order – IW31

as detailed in the PM_WO_300 Practice Guide.

Work Order Processing PM_WO_300_LSO_v1   58
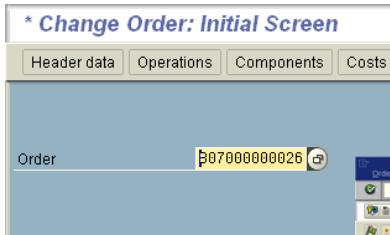
Unit 4

Changing
Work Orders

Change a Work Order – IW32

- You may need to modify an existing work order to change any of the following:
  - Description of the Work
  - Functional Location
  - Work Duration
  - Components
  - Person or Work Group Assigned
  - And other information
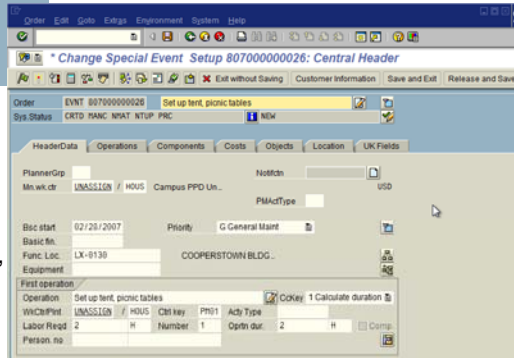
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Change a Work Order – IW32

* Change Order: Initial Screen

| Header data | Operations | Components | Costs |

Order   807000000026

In IW32 enter the Order number in the Order field and press Enter. The work order is displayed ready to be changed.

If you do not know the Order number, click on the Possible Entries icon to search for it.
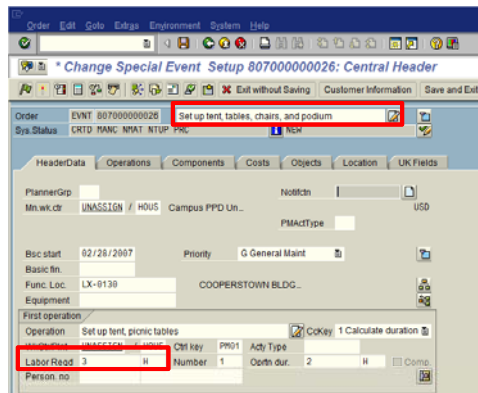
Change a Work Order – IW32

In this example we needed to add "chairs, podium" to the work description and increase the Labor Required from 2 hours to 3 hours.

Remember, you can also change:
- Functional Location
- Add Components
- Person or Work Group Assigned
- And other information

When you have completed all the changes, click the save icon. The Work Order is saved with its original number and is displayed in the lower-left corner of the screen.
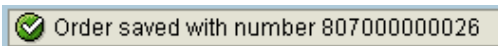
Order saved with number 807000000026

Unit 4
Check for Understanding

Unit 5

PM Materials

Work Order Processing PM_WO_300

Materials and Inventory

- Materials Management Inventory replaced Stores Inventory Systems

- On-shelf inventory should be kept to a minimum

- We are utilizing "just-in-time" inventory (parts are requisitioned daily)

- There are 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

- Non-file materials are not identified by numbers in IRIS

Types of Components

- **Stock materials:**   **-** Parts are kept on hand and
                           - have IRIS material numbers

- **Non-stock**   **-** Parts which are used less frequently
  materials: **-** they are ordered as needed from suppliers and
                           - have IRIS material numbers

- **Non-file**   **-** Parts are ordered as needed and
  materials: **- do not** have IRIS material numbers
                           - remember non-file means "not on file"

- **Services:** Services provided by external companies and are requested as needed

- **Text Items:** Text Items are instructions or comments about materials required for a work order, such as a note to bring a ladder or supplies like electrical tape.

Work Order Processing PM_WO_300

Planned Materials on a Work Order

- Planning a **STOCK material** results in a **Reservation** being created in the Storeroom.
  - The Storeroom can then pick, stage, and deliver the materials as required.

- Planning a **NON-STOCK material** results in a **Reservation** being created in the Storeroom and in the **automatic** creation of a Purchase **Requisition**.
  - The requisition is processed by Purchasing and materials are delivered to Central Stores. The Storeroom can then pick, stage, and deliver the materials as required.

- Planning a **NON-FILE material** results in a **Reservation** being created in the Storeroom and in the **manual** creation of a Purchase **Requisition**.
  - The requisition is processed by Purchasing and materials are delivered to Central Stores. The Storeroom can then pick, stage, and deliver the materials as required.

Unplanned Materials on a Work Order

- Unplanned stock materials may be issued directly to a work order.
  - Storeroom personnel will issue the material and charge it to the work order number.
  - The name of the person receiving the material is also recorded.

Work Order Processing PM_WO_300

How to plan stock materials

There are several ways to select the materials:

- Enter the component number, if known
- Use **Possible Entries** to search to find the part number or description.
  - Asterisks are used as "wildcards" in a search to let you search using partial information.
  - Examples: *bearing* will find all materials with "bearing" anywhere in the description; *filter*16* will find all materials with "filter" and "16" in the description (such as Filter, Air, 16x20x1)
  - For more detailed information using Possible Entries see the Functional Locations slides earlier in this course.

Planning Materials on an Order

To add materials to an order, click on the Components tab.

The **Components** tab of a Work Order is displayed

Work Order Processing PM_WO_300

Columns on the Components Tab

HeaderData	Operations	Components	Costs	Objects	Location	UK Fields

Item	Component	Description	LT	Reqmt Qty	UM	IC	SLoc	PInt	OpAc	Proc. Category
0010								UK10		
0020								UK10		

Item	Sequential number on the list
Component	The component **number** in IRIS
Description	Text describing the component
Reqmt Qty	Quantity required for the work
UM	Unit of Measure, such as EA for each
IC	Item Category; Stock, Non-stock, Non-file, etc.
SLoc	Storage Location
PInt	Plant; always UK10

Work Order Processing PM_WO_300_LSO_v1   71

Planning Stock Materials

* Change Corrective (Repair) 807000000520: Component Overview

Exit without Saving   Customer Information   Save and Exit   Release and Save

Order   REPR 807000000520   Leak in faucet valve
Sys.Status   CRTD MANC NMAT PRC   NEW

HeaderData	Operations	Components	Costs	Objects	Location	UK Fields

| Item	Component	Description	LT	Reqmt Qty	UM	IC	SLoc	PInt	OpAc	Proc. Category
0010								UK10		
0020								UK10		

The component field is used for the **IRIS Component number** for both stock and non-stock items.

If you know the component number, enter the number in the field.
If you do not know the component number, use **Possible Entries to search** for the number.

Work Order Processing PM_WO_300_LSO_v1   72

Work Order Processing PM_WO_300

Planning Materials – Possible Entries
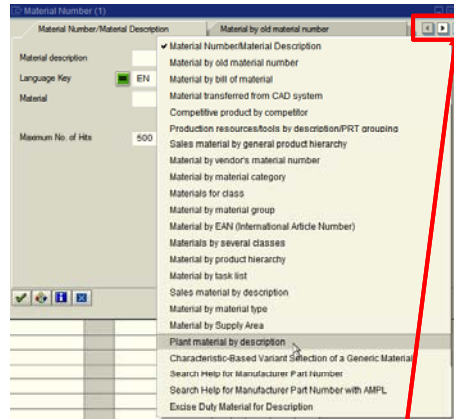
When the Possible Entries search box appears click the list icon and choose the **Plant Material by description** tab to search for components by a description.

Planning Materials – Search by Description
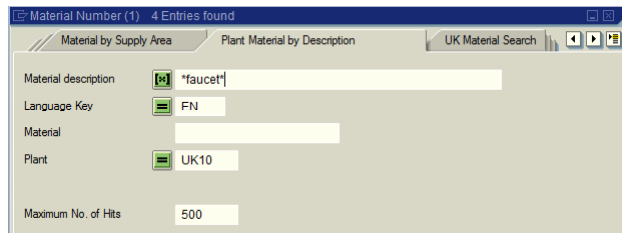
We need to plan a faucet on the work order.

Since we are not sure where in the description the word faucet appears, we use the wildcard character (the asterisk) both in front and in back of the word faucet…i.e. *faucet*, to search for all materials with the word *faucet* **anywhere** in the description.

Work Order Processing PM_WO_300

Planning Materials – Search Results

The search results appear.

The faucet we need to plan is the Delta 501. Double-click the Delta 501 faucet to **enter** the component number in the component field.

Planning Stock Materials

Once the component number is entered you only need to enter the quantity required and press enter to complete the entry.

When you press enter, the system checks for the component number in the Master Data file. The system then automatically populates the Description, Unit of Measure, Item category, and stocking information fields.

Repeat entering the component field, required quantity, and pressing enter for each Stock Material you want to plan.

Work Order Processing PM_WO_300

Planning Non-Stock Materials

To plan a non-stock component the process is the same…You enter the component number, the quantity required and press enter to complete the entry.

The only difference between a stock and non-stock component is one is kept on hand in stock and the other is ordered as needed.

The IC (Item Category) column shows the stock and non-stock status.

ICt	Item category te...
C	Compatible Unit
L	Stock item
M	Intra material
N	Non-stock item
R	Variable-size item
T	Text item

The system has all the information necessary to *automatically* start the purchase requisition process to order the non-stock component.

Planning Non-file Materials

For a non-file component, first enter a description, quantity, and unit of measure and then press the Enter key. A Detail Purchasing dialog box appears.

Although the only required field is the **Price** field you should complete as many fields as possible. Purchasing will use this information to order the non-file component needed.
If you are planning Services remember to change the Material Group.

Work Order Processing PM_WO_300

Purchasing Information – Reference Only Slide

Information required to order non-stock materials:

- **Requirement Quantity** – How many are needed? (defaults from quantity entered on the Components tab)
- **Price** - Cost of material
- **Material Group**
  - System defaults to PM000001 for PM Non-Material Master Material
  - If requesting services change to PM000002 for PM Non-Material Master Service
- **Purchasing Group** – Defaults to 000 / UK00
  - 000 = Work Order / UK00 = Purchasing
- **Goods Recipient** – Who should receive the material?
- **Requisitioner** – Who is requesting the material?
- **Unloading Point** – Where should material be delivered?
- **Vendor Material Number** – Description of the material

Adding a Text Component

| Order | REPR 807000000520 | Leak in faucet valve | | | | | | | | |
| Sys.Status | CRTD MANC NMAT PRC | | NEW | | | | | | | |

HeaderData | Operations | Components | Costs | Objects | Location | UK Fields

Item	Component	Description	LT	Reqmt Qty	UM	IC	SLoc	PInt	OpAc	Proc. Category
0010	304741	FAUCET, LAVATORY, DELTA 501		1	EA	L	0001	UK10	0010	Reservation for Order
0020	310090	FAUCET, LAVATORY, ZURN, 4"		1	EA	N		UK10	0010	PReq for Order
0030		Delta Faucet Diverter RP6073		1	EA	N		UK10	0010	PReq for Order
0040		Bring a 9 foot lader				t		UK10		
0050								UK10		

To enter a text item (additional instructions), enter the information in the description field and enter a "T" in the Item Category field (see line 0040)…then press enter.

If you press enter before entering the "T" in the Item Category field the system will assume you are entering a non-file item.

ICt	Item category te…
C	Compatible Unit
L	Stock item
M	Intra material
N	Non-stock item
R	Variable-size item
T	Text item

Also notice that the non-file item on line 0030 does not have a component number. The reason is that the system does not have any information about the item…i.e. non-file equals "not on file".

Planned Cost Display

When you Save the Work Order, all Costs are calculated automatically. To see the calculated cost now, select the Cost tab.

Calculating Planned Components Cost

Notice that only the initial planned labor cost are currently shown on the Cost tab. When the Work Order was saved, those cost were calculated. To see the additional calculated cost (the components just entered) now you need to refresh the screen. To do this click on the **Determine Costs** icon. This will calculate all cost items that were added to the work order since the last time it was saved.

Work Order Processing PM_WO_300

Planned Components Cost
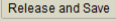
After clicking the Determine Costs icon all cost items are displayed.
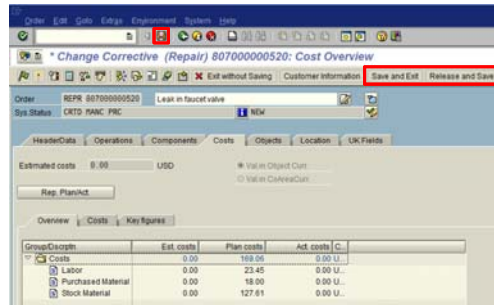
When you have finished adding Components, click either on the **Save** icon or the **Save and Exit** push button [Save and Exit]

The work order is saved with the same work order number and all cost items are calculated and saved.

Until the Work Order is released it can not be worked and components will not be staged or ordered. If the order is to be released now, click on the Release and Save push button. [Release and Save]

Unit 5
Check for Understanding

Work Order Processing PM_WO_300

Exercise 4

To practice the transaction(s) discussed in this unit, refer to:
Exercise 4 – Add Components to a Work Order – IW32

as detailed in the PM_WO_300 Practice Guide.

UK UNIVERSITY OF KENTUCKY — Work Order Processing PM_WO_300_LSO_v1 — 85

Unit 6

Work Order List Displays

UK UNIVERSITY OF KENTUCKY — Work Order Processing PM_WO_300_LSO_v1 — 86

Work Order Processing PM_WO_300

Work Order List Displays in IRIS

- List Displays can help manage work. You can specify criteria and produce lists of work orders for planning and analysis.
- Selection screens and variants can narrow your requests for information.
- Drill-down (double-clicking an item) functionality can provide detail.

- In this unit we will look at 2 list displays:
  - List Display Orders – IW39
  - Multi-Level Order List Displays – IW40

List Display Orders – IW39

To display specific work orders, you can set criteria such as Order Status, Type, and/or Functional Location, etc.

To search in any field, click on the Possible Entries icon for that field.

In this example we want to display a list of REPR (Repair) Work Orders that are Outstanding (Not Released) or In process (Released) for the date period showing.

After entering all your criteria, click the execute icon

Work Order Processing PM_WO_300

Display the List

Display PM orders: List of Orders

S	Order	Type	Bsc start	Description	PlanTotCos	ActTotCost
	807000000000	RE...	02/20/2007	Test Repair Order	54.02	0.00
	807000000001	RE...	02/20/2007	Test Repair Order	54.02	0.00
	807000000002	RE...	03/11/2007	Test derivation rules and stuff	6.18	23.45
	807000000003	RE...	02/14/2007	test posting	0.00	156.42
	807000000004	RE...	02/21/2007	Test order types	0.00	54.64
	807000000020	RE...	02/20/2007	Test Order for Posting	46.90	46.91
	807000000021	RE...	02/20/2007	Please check thermostat-room is cold	46.90	0.00
	807000000022	RE...	02/21/2007	Repair door hinge	46.90	0.00
	807000000025	RE...	02/28/2007	Change air filter	34.50	0.00
	807000000027	RE...	02/28/2007	Repair door hinge	46.90	0.00
	807000000028	RE...	02/28/2007	Thermostat is making loud hissing noise	34.50	0.00
	807000000030	RE...	02/28/2007	Tighten projector brackets	23.45	0.00
	80700000...					0.00
	80700000...					0.00
	80700000...					0.00
	80700000...					0.00
	80700000...					0.00
	807000000042	RE...	03/10/2007	test	0.00	0.00
	807000000043	RE...	03/11/2007	Door off hinge	174.80	0.00
	807000000044	RE...	03/11/2007	Door broken	12.00	0.00
	807000000060	RE...	03/13/2007	Replace 20 lightbulbs	11.73	439.69
	807000000061	RE...	03/13/2007	Replace 20 lightbulbs	11.73	48.78
	807000000062	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00
	807000000063	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00
	807000000064	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00

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

Change the Layout

Display PM orders: List of Orders

Click the **Change Layout** icon to add or remove columns.
You can add fields and rearrange the order of the columns. Click the Save icon to save the layout, or press Enter to simply display it.

Work Order Processing PM_WO_300

The Changed Layout

* Display PM orders: List of Orders

S	Order	Type	Bsc start	Description	PlanTotCos	ActTotCost	Functional location
	807000000000	RE...	02/20/2007	Test Repair Order	54.02	0.00	LX-0005
	807000000001	RE...	02/20/2007	Test Repair Order	54.02	0.00	LX-0005
	807000000002	RE...	03/11/2007	Test derivation rules and stuff	6.18	23.45	LX-0005
	807000000003	RE...	02/14/2007	test posting	0.00	156.42	LX-0005
	807000000004	RE...	02/21/2007	Test order types	0.00	54.64	LX-0005
	807000000020	RE...	02/20/2007	Test Order for Posting	46.90	46.91	LX
	807000000021	RE...	02/20/2007	Please check thermostat-room is cold	46.90	0.00	LX-0001-01-104A
	807000000022	RE...	02/21/2007	Repair door hinge	46.90	0.00	LX-0045-01-100
	807000000025	RE...	02/28/2007	Change air filter	34.50	0.00	LX-0293-02
	807000000027	RE...	02/28/2007	Repair door hinge	46.90	0.00	LX-0045-00-72
	807000000028	RE...	02/28/2007	Thermostat is making loud hissing noise	34.50	0.00	LX-0294-03
	807000000030	RE...	02/28/2007	Tighten projector brackets	23.45	0.00	LX-0026-02-230
	807000000031	RE...	02/21/2007	Light in lobby is shooting sparks	46.90	0.00	LX-0082-01
	807000000032	RE...	02/28/2007	Replace chalkboard with whiteboard	46.90	0.00	LX-0001-02-235
	807000000033	RE...	02/28/2007	Replace smoke detector	0.00	0.00	LX-0006-02-218
	807000000040	RE...	03			0.00	LX-0045-00-12
	807000000041	RE...	03			0.00	LX-0293
	807000000042	RE...	03			0.00	LX-0293
	807000000043	RE...	03			0.00	LX-0045-00-08
	807000000044	RE...	03/11/2007	Door broken	12.00	0.00	LX-0045-00-08
	807000000060	RE...	03/13/2007	Replace 20 lightbulbs	11.73	439.69	LX-0030-02-249
	807000000061	RE...	03/13/2007	Replace 20 lightbulbs	11.73	48.78	LX-0030-02-249
	807000000062	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00	LX-0030-02-249
	807000000063	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00	LX-0030-02-249
	807000000064	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00	LX-0030-02-249
	807000000065	RE...	03/13/2007	Replace 20 lightbulbs	11.73	0.00	LX-0030-02-249

The new layout appears.

UNIVERSITY OF KENTUCKY   Work Order Processing PM_WO_300_LSO_v1   91

Download Data to Spreadsheet

* Display PM orders: List of Orders

S	Order	Type	Bsc start	Description	PlanTotCos	ActTotCost	Functional location
	807000000000	RE...	02/20/2007	Test Repair Order	54.02	0.00	LX-0005
	807000000001	RE...	02/20/2007	Test Repair Order	54.02	0.00	LX-0005
	807000000002	RE...	03/11/2007	Test derivation rules and stuff	6.18	23.45	LX-0005

To download the data to an Excel spreadsheet follow these steps:

- When the list is displayed, click on the **Spreadsheet** icon.
- You will be prompted to "Enter number of key columns."
  You can leave it 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 and you can
  format, save, and use it as you wish just as any other Excel spreadsheet.

UNIVERSITY OF KENTUCKY   Work Order Processing PM_WO_300_LSO_v1   92

Work Order Processing PM_WO_300

Multi-Level Order List Display – IW40

- A multi-level order list allows more detailed information.
- Use this function to view an order from a list to see more detail, such as any sub-orders or labor costs associated with the order.

Multi-Level Order List Display – IW40

Similar to IW39, to display specific work orders, you can set criteria such as Order number, Type, and/or Functional Location, etc.

To search in any field, click on the Possible Entries icon for that field.

In this example we are searching for all outstanding and in progress work orders for the date period showing.

After entering all your criteria, click the execute icon

Work Order Processing PM_WO_300

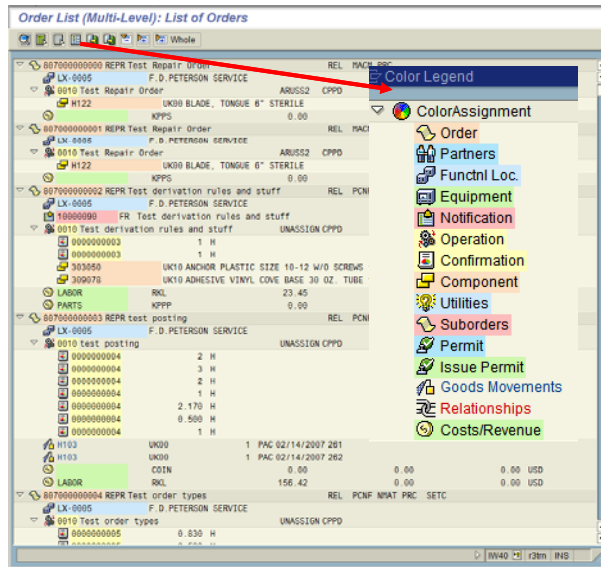## Multi-Level Order List Display – IW40

The Order information is displayed.

To see anything in more detail just double click the item...examples:

Double click a work order to open it.

Double click a functional location to see the master data

The legend is also shown.

Unit 6
Check for Understanding

Work Order Processing PM_WO_300

To practice the transaction(s) discussed in this unit, refer to:

Exercise 5 – Change Layout of Order List Display – IW39

as detailed in the PM_WO_300 Practice Guide.

UK UNIVERSITY OF KENTUCKY   Work Order Processing PM_WO_300_LSO_v1   97

Course Summary

You should now have an understanding of:

- Creating Work Orders
- Creating Sub-orders
- Changing Work Orders
- Materials
- Adding Components to Work Orders
- Work Order List Displays

UK UNIVERSITY OF KENTUCKY   Work Order Processing PM_WO_300_LSO_v1   98

Work Order Processing PM_WO_300

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 – 257-3421
  - Skip Van Hook – bevanh2@email.uky.edu – 257-5397

- 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

Course Assessment

- To complete Part 2 of the course assessment:
  1. Click on the **Attachments** link (ATTACHMENTS) in the upper-right corner of this screen
  2. Click on the **Work Order Processing Assessment** link (the assessment will open in a separate browser window)
  3. Print the assessment
  4. Follow all of the instructions listed

- Email IRISTraining@email.uky.edu with any questions or issues.

Work Order Processing PM_WO_300

Course Completion Instructions

- To complete this course:
    1. Click on the **Attachments** link (ATTACHMENTS) in the upper-right corner of this screen
    2. Click on the **QRC Course Completion** link (the QRC will open in a separate browser window)
    3. Print the QRC
    4. Follow all of the instructions listed

- Email IRISTraining@email.uky.edu with any questions or issues.