



Work Order Processing PM_WO_300



Course Content



- Unit 1 – Work Planning Overview
- Unit 2 – Work Orders
- Unit 3 – Creating a Work Order
- Unit 4 – Changing Work Orders
- Unit 5 – PM Materials
- Unit 6 – Work Order List Displays

Prerequisites and Roles



- Prerequisites

- ♦ PM UK_100 IRIS/SAP Awareness & Navigation
- ♦ PM_200 Plant Maintenance Overview

- Roles

- ♦ All Plant Maintenance managers, supervisors, and workers who will process work orders 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

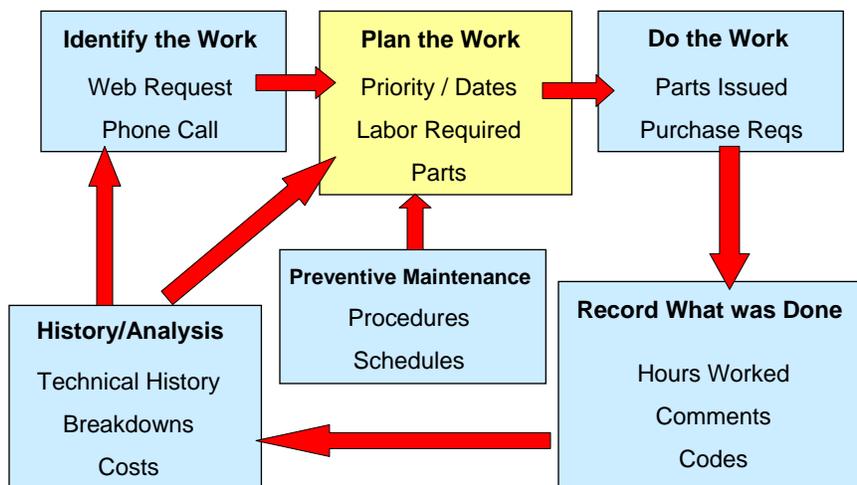


- Integrate Plant Maintenance with Finance, Human Resources, and Materials
- Allow enhanced scheduling and planning for work assignments
- Provide work scheduling as well as management reporting tools
- Improve automated updates to customers about the status of work
- Implement a Preventive Maintenance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

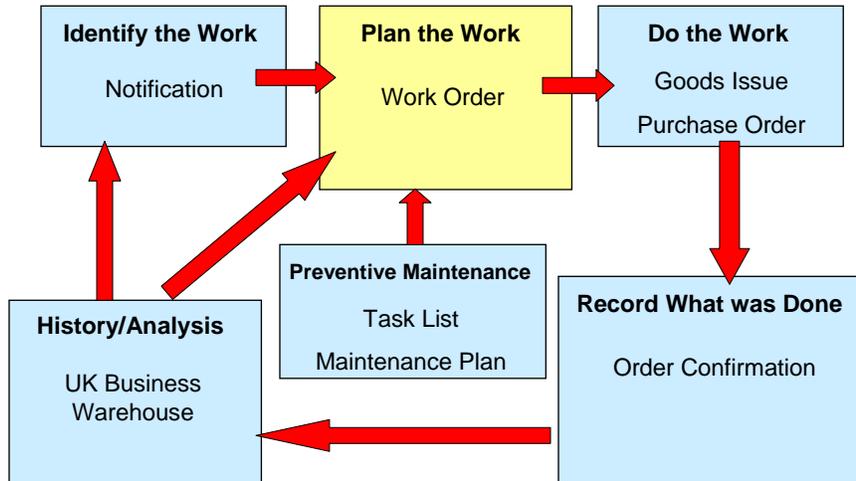


Work Planning Overview

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 – Buildings



- The Building: LX-0082
College of Pharmacy
- The Floor: LX-0082-01
College of Pharmacy, 1st floor
- The Room: LX-0082-01-116A
College of Pharmacy, 1st floor, room 116A
- LX-0082-ST
College of Pharmacy Stairway
- LX-0082-EL
College of Pharmacy Elevator

Functional Locations



- How are Functional Locations 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).
 - ♦ 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 2



Work Orders

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



- **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

Optional Information on a Work Order



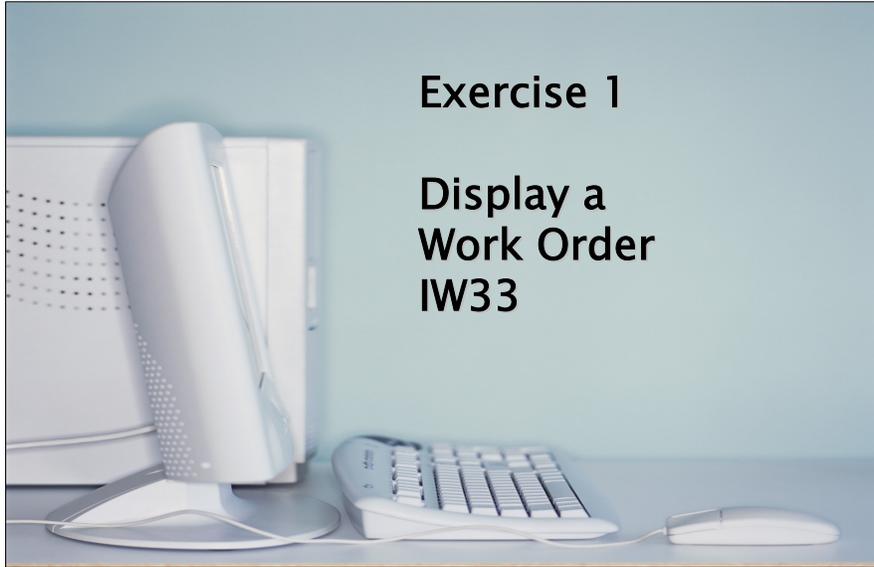
- **Description** – Text describing the work that is to be done; this can include “long text” of unlimited length
 - ♦ Examples: Repair thermostat; Fix broken window
- **Work Duration** – Number of hours of planned labor
 - ♦ Example: 2 H (2 hours)
- **Main Work Center** = 2 fields
 - ♦ Field 1 – **initially created “Unassigned”** – The work group 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 orders.



Exercise 1

Display a Work Order IW33



Creating a Work Order

Create a Work Order – IW31



Order Type

Priority

Func. Loc.

Equipment

1. Enter or Select an Order Type (REPR, RENOV, 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.

There are 3 required fields on the first screen:

- Order Type
- Priority
- Functional Location or Equipment

Work Order Types



Order Type

Priority

Func. Loc.

Equipment

1. Enter or Select an Order Type (REPR, RENOV, 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.

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
RENOV	Renovation (Charged Out)
REPR	Corrective (Repair)

Work Order Types



Type	Name
CASH	Cash Chargeout 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

Priority



Order Type REPR

Priority 

Func. Loc.

Equipment

1. Enter or Select a Priority (RENV, etc.)

2. Select a Priority

3. Enter a Function Code (enter LX and)

Order

Use this field to COPY information

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



Each priority has a specified time span for the work. This time span is incorporated in the Order.

Priority



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

Functional Location



Order Type

Priority 

Func. Loc. 

Equipment

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

Order

Use this field to COPY information from an existing order.

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

To see the **complete** Functional Location structure, **enter LX first** and then click the Structure List icon.

Functional Location



Asset

Sub-number

Company Code

Functional Location

Maximum No. of Hits: 500

- Asset
- Cost center
- Uppermost FunctLocs by StructIndicator
- Uppermost FunctLocs by category
- Uppermost FunctLocations by company area
- Uppermost FunctLocations by location
- Location list
- Address
- Text (= Description)**
- Functional location list (service)
- Structural display
- Classification
- Real Estate Object

The Functional Location search box will appear.

Navigate to the **Text (= Description)** tab.

Functional Location



Description: *mcvey*

Language Key: EN

Functional Location

Maximum No. of Hits: 500

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

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 0	
LX-0045-00-12	MCVEY HALL - Room 0	
LX-0045-00-13	MCVEY HALL - Room 0	
LX-0045-00-14	MCVEY HALL - Room 0	
LX-0045-00-14A	MCVEY HALL - Room 0	
LX-0045-00-14B	MCVEY HALL - Room 0	
LX-0045-00-15	MCVEY HALL - Room 0	
LX-0045-00-15A	MCVEY HALL - Room 0	
LX-0045-00-16	MCVEY HALL - Room 0	
LX-0045-00-57	MCVEY HALL - Room 0	
LX-0045-00-58	MCVEY HALL - Room 0	
LX-0045-00-58A	MCVEY HALL - Room 0	
LX-0045-00-58B	MCVEY HALL - Room 0	
LX-0045-00-59	MCVEY HALL - Room 0	
LX-0045-00-60	MCVEY HALL - Room 0	
LX-0045-00-60A	MCVEY HALL - Room 0	
LX-0045-00-61	MCVEY HALL - Room 0	
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
LX-0045-00-73	MCVEY HALL - Room 073	EN
LX-0045-00-75	MCVEY HALL - Room 075	EN

The Functional Location matches will be displayed.

Double-click on the appropriate location to populate the Functional Location field on the Work Order. Then press enter.

Create a Work Order - IW31



* Create Order: Initial Screen

Header data Exit without Saving

Order Type

Priority

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.

The required fields are complete.

Press Enter

Create a Work Order - IW31



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

Press Enter to proceed.

Create a Work Order - IW31



The work order will appear.

Enter a description of the work.

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

Create a Work Order – IW31



* Create Corrective (Repair) : Central Header

Order REPR 80000000001 Repair door hinge

Sys.Status CRTD NANC NTUP NEW

HeaderData Operations Components Costs Objects UK Fields

PlannerGrp / UK10

Mn.wk.ctr UNASSIGN / CPPD PPD - Unassigne...

Bsc.start 03/17/2007 Priority D

Basic fin. 03/18/2007

Func. Loc. LX-0045-00-72 MCVEY HALL

Equipment

Notifctn 10000212 USD

Breakdown Info Codes Reported by

Malf.start 03/18/2007 10:24:40 Breakdown

MalfEnd 00:00:00 Breakdown dur. H

First operation

Operation Repair door hinge

Mn.wk.ctr UNASSIGN / CPPD Ctrl key PM01 Acty Type LABOR

Work durtn 2 H Number

For planning purposes you may want to enter an **estimate** of the labor time required.

Click on the Save icon  to save the order.

Work Order Number



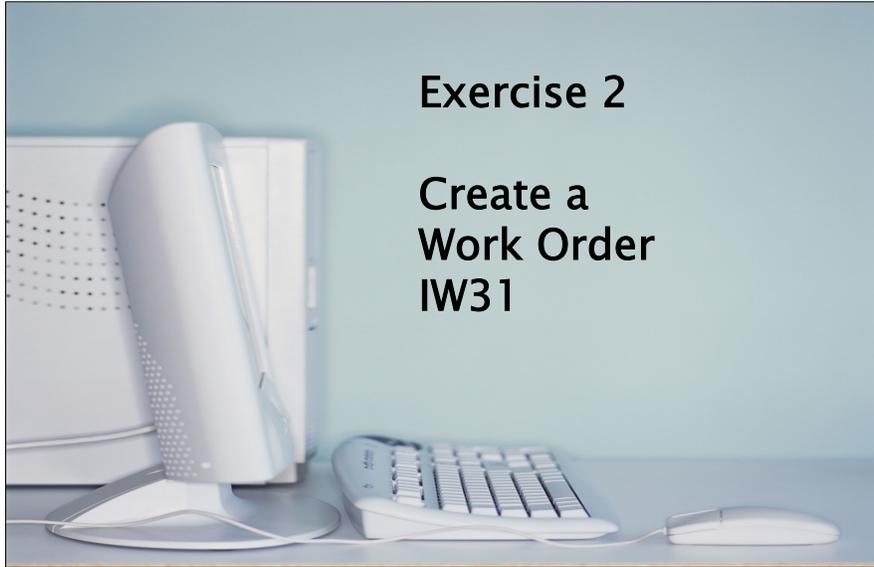
The Work Order number is displayed in the lower-left corner of the screen

Only **REPR** (Corrective Repair) Work Orders are saved with a notification number.

 Order 807000000164 saved with notification 10000212

 Order 807000000164 saved

All other Work Orders are saved without a notification number.



- 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.

Create Work Order from Notification - IW34



- 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.

Create Work Order from Notification - IW34



- Information for this function:
 - ♦ **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

Create Work Order from Notification - IW34



Fields on the first screen:

Order Type
Priority
Notification

Notification Display



A notification is typically what, where and contact info

Create Work Order from Notification - IW34



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)

Create Work Order from Notification - IW34



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

D	Daily Operations
E	Emergency
F	Research Fac
G	General Maint
P	Patient Care
R	Renovations
S	Scheduled Maint
X	Elective Improv

Create Work Order from Notification - IW34



Create Notification Order: Initial Screen

Header data

Order Type REPR

Priority D Daily Operations

Notification |

Reference

Order

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.

Create Work Order from Notification - IW34



Order Edit Goto Extras Environment System Help

* **Create Notification Order: Initial Screen**

Header data

Order Type REPR

Priority D Daily Operations

Notification 10000127

Reference

Order

Press the Enter key or click on the Enter icon.



Create Work Order from Notification - IW34



The Create: Central Header screen is displayed.

* Create Corrective (Repair) : Central Header

Order REPR %000000000001 Sink is clogged

Sys.Status CRTD MANC NTUP NEW

HeaderData Operations Components Costs Objects

Notifctn 10000014 USD

PlannerGrp / UK10

Mn.wk.ctr NICK / CPPD Arnold, Nicholas A PMActType

Bsc start 02/22/2007 Priority Daily Operations

Basic fin. 02/23/2007 Revision

Func. Loc. LX-0055-01-128D CHEMISTRY-PHYSICS - Room 128D

Equipment

Create Work Order from Notification - IW34



Breakdown Info Damage

Malf.start 02/21/2007 13:11:00 Breakdown

MalfEnd 00:00:00 Breakdown dur. H

First operation

Operation

WkCntr NICK / CPPD Ctrl key PM01 Acty Type LABOR

Work durtn H Number Comp.

Person. No.

Scroll down to the First operation section.
Enter the work duration in the **Work durtn** field.

Example: 2 (for 2 hours)

Create Work Order from Notification - IW34



When you Save the Work Order, all Costs are calculated.

To see the calculated cost now...

Click on the Determine Costs icon on the Application toolbar.



Breakdown Info

Malf.start 02/21/2007 13:11:00 Breakdown
MalfEnd 00:00:00 Breakdown dur. H

First operation

Operation							
WkCtr/PInt	NICK	/	CPPD	Ctrl key	PM01	Acty Type	LABOR
Work durtn	2		H	Number			<input type="checkbox"/> Comp.
Person. no							

Create Work Order from Notification - IW34



Costs were determined: See cost overview

This system message will appear in the lower-left corner of the screen.



Click on the Costs tab to display the costs.

Create Work Order from Notification - IW34



Group/Dscrptn	Est. costs	Plan costs	Act. costs	C...
Costs	0.00	80.00	0.00	U...
Labor	0.00	80.00	0.00	U...

Create Work Order from Notification - IW34



Click the Save icon to save your Work Order.



Order 807000000041 saved with notification 10000014

The system will assign a number to the order and display it in the lower-left corner of the screen.

Creating a Sub-order - IW36



- 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
- These 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.
- 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.

Create Sub-order - IW36



Header data	
Order Type	RENV
Priority	R Renovations
Superior order	887000000164

Reference	
Order	

Fields on the first screen:

- Order Type
- Priority
- Superior Order

Create Sub-order - IW36



*** Create Renovation (Charged Out) : Central Header**

Order: RENV %0000000001 McVey Renovation - Audio/Visual work

Sys.Status: CRTD MANC NTUP

HeaderData Operations Components Costs Objects UK Fields

SuperOrder: 807000000164 McVey Renovation

PlannerGrp: / UK10

Mn.wk.ctr: UNASSIGN / CPPD PPD - Unassigne...

Bsc.start: 03/17/2007 Priority: R F

Basic.fin: 03/18/2007

Func. Loc: LX-0045-00-72 MCVEY HALL - Room 072

Equipment

First operation

Operation

WkCtr/Pint: UNASSIGN / CPPD Ctrl key: PM01 Acty Type: LABOR

Labor Reqd: H Number

Person. no

From this point on the process is the same as a regular work order.

Display Superior and Sub-order



*** Create Renovation (Charged Out) 807000000164: Central Header**

Order: REPR 807000000164 McVey Renovation

Sys.Status: CRTD MANC NMAT NTUP - PRC

HeaderData Operations Components

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

- 807000000164 REPR McVey Renovation CRTD
- 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

Order: RENV %0000000001 McVey Renovation - Audio/Visual work

Sys.Status: CRTD MANC NTUP

HeaderData Operations Components Costs Objects UK Fields

SuperOrder: 807000000164 McVey Renovation

Superior Order

List of Subs

Sub-Order



Changing Work Orders

Change a Work Order – IW32

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

Change a Work Order - IW32



*** Change Order: Initial Screen**

Header data Operations Components Costs Additional data

Order 807000000026

Type the Order number in the Order field and press Enter.

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

Change a Work Order - IW32



*** Change Special Event Setup 807000000026: Central Header**

Order EVNT 807000000026 Set up tent, picnic tables

Sys.Status CRTD MANC NMAT NTUP PRC NEW

HeaderData Operations Components Costs Objects

PlannerGrp / UK10 Notifctn USD

Mn.wk.ctr UNASSIGN / HOUS Campus PPD Un... PMActType

Bsc start 02/28/2007 Priority General Maint

Basic fin. Revision

Func. Loc. LX-0130 COOPERST

Equipment

First operation

Operation Set up tent, picnic tables

WkCtr/PInt UNASSIGN / HOUS Ctrl key PM01 Acty Type

Work durtn 2 H Number 1 Comp.

The Work Order is displayed.

Change a Work Order - IW32



* Change Special Event Setup 807000000026: Central Header

Order: EVNT 807000000026 Set up tent, tables, chairs, podium

Sys.Status: CRTD MANC NMAT NTUP Pro

HeaderData Operations Cor

PlannerGrp: / UK10

Mn.wk.ctr: UNASSIGN / HOUS

Bsc.start: 02/28/2007

Basic fin.

Func. Loc.: LX-0130

Equipment

First operation

Operation: Set up tent, picnic tables

Work durtn: 3 H

Person. no.

We needed to add "chairs, podium" to the work description and increase the work duration from 2 hours to 3 hours.

Remember you can also change:

- Functional Location
- Work Duration
- Components
- Person or Work Group Assigned
- And other information

Saving a Change to a Work Order



 Order saved with number 807000000026

The Work Order is saved **with its original number**, which is displayed in the lower-left corner of the screen.



PM Materials

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

Types of Components



- **Stock materials:** Parts that have IRIS material numbers and are kept on hand
- **Non-stock materials:** Parts which are used less frequently that do have IRIS material numbers. They are ordered as needed from suppliers
- **Non-file materials:** Parts ordered as needed and do not have IRIS material numbers
- **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.

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.

How to plan stock materials



There are several ways to select the materials:

- Enter the component number, if known
- A **Possible Entries search** may be performed to find the part number or description.
 - ♦ Asterisks can be used as “wildcards” in a search, to let you search using partial information.
 - ♦ Examples: *bearing* will find all materials with “bearing” in the description; *filter*16* will find all materials with “filter” and “16” in the description (such as Filter, Air, 16x20x1)
- Future Enhancements
 - ♦ A **Bill of Material (BOM)** for the building, room, or equipment to be maintained. The BOM may be used to suggest part numbers.
 - ♦ A **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



*** Create Corrective (Repair) : Central Header**

Order REPR %0000000001 Repair door/replace closer

Sys.Status CRTD MANC NTUP NEW

HeaderData Operations **Components** Costs Objects UK Fields

PlannerGrp / UK10 Notifctn 10000215 USD

Mn.wk.ctr UNASSIGN / CPPD PPD - Unassigne PMActType

Bsc start 03/17/2007

Basic fin. 03/18/2007

Func. Loc. LX-0045-00-72

Equipment

We want to add materials to an order. Click on the Components tab.

Planning stock materials



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

*** Create Corrective (Repair) : Component Overview**

Order REPR %0000000001 Repair door/replace closer

Sys.Status CRTD MANC NTUP NEW

HeaderData Operation **Components** Costs Objects UK Fields

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	Plnt
0010								UK10
0020								UK10
0030								UK10
0040								UK10
0050								UK10
0060								UK10
0070								UK10

Columns on the Components Tab



Item	Component	Description	Reqmnt Qty	UM	IC	SLoc	Plnt
0010							UK10

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

Planning Materials on an Order



* Create Corrective (Repair) : Component Overview

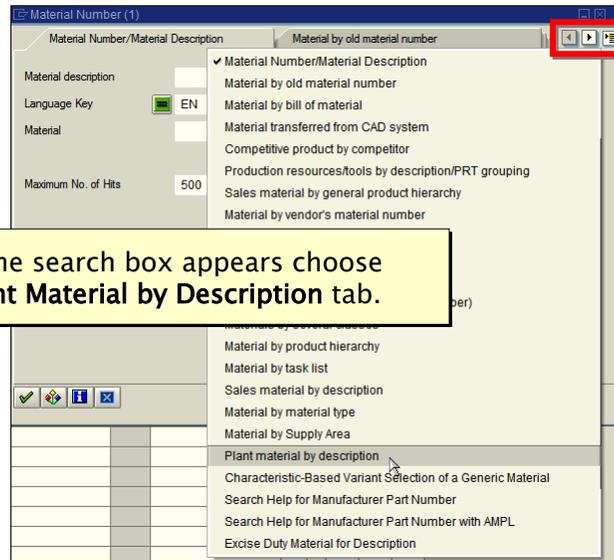
Order REPR %0000000001 Repair door/replace closer

Sys Status CRTD MANC NTUP NEW

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	Plnt
0010								UK10
0020								UK10
0030								UK10
0040								
0050								
0060								
0070								

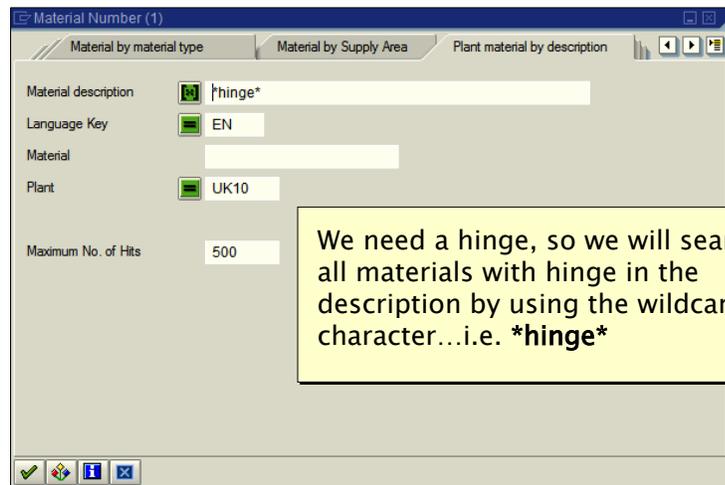
We will search for the Components (materials) needed by clicking on the **Possible Entries** icon in the Component field.

Planning Materials – Search by Description



When the search box appears choose the Plant Material by Description tab.

Planning Materials – Search by Description



We need a hinge, so we will search for all materials with hinge in the description by using the wildcard character...i.e. *hinge*

Planning Materials - Search by Description



Material Number (1) 27 Entries found

Material by material type | Material by Supply Area | Plant material by description

Material description	Language	Material	Plant
#90110 & #10760 HINGE & BASEPLATE	EN	300281	UK10
18" X 18" B LABELED BOTTOM HINGED SS CHU	EN	302066	UK10
5 X 5 BB1168 US26D HINGE	EN	300283	UK10
5" X 4 1/2" HINGE BB1168 US26D	EN	300293	UK10
BALL BEARING BUTT HINGE 4 1/2 X 4 1/2 HV	EN	300282	UK10
BB1163 4 1/2 US26D HALF SURFACE HINGE	EN	300287	UK10
BB1279 4.5 X 4.5 BRONZE HINGE US10B	EN	300291	UK10
BEMIS WHITE HINGE TRAYCO # 0283903	EN	300524	UK10
BLUM HINGE 71T6550 & 175H9190			
DOOR STOP, HINGE PIN			
HINGE 1/2 SURFACE 4 1/2 MCKINNEY T277			
HINGE 1/2 SURFACE BB 4 1/2 US26D MCK			
HINGE 4 1/2 BB FULL SURFACE			
HINGE CONTINUOUS 84 INCH			
HINGE FILLER-DOOR 4 1/2 W-583			
HINGE FULL MORT BB 4 1/2X4 1/2 US26D S			
HINGE FULL MRT 4 1/2X4 1/2 US26D SET3			
HINGE, 4 1/2, FM, NRP, US26D, MCKINNEY			
HINGE, FULL MORTISE, BALL BEARING, 4 1/2	EN	303077	UK10
HINGE, HALF SURFACE, # BB1173, 4 1/2, B	EN	300285	UK10
HINGE, PIVOT, LH 626 EM19U	EN	300199	UK10
HINGE, PIVOT, RH 626 EM19U	EN	300198	UK10
HINGE, TIGHT PIN, 2 X 2, ZINC PLATED, 10	EN	303076	UK10
HINGE FM, 4-1/2, US3	EN	308892	UK10
HS-060 HINGE SHIM (DON-JO) # 924035	EN	300290	UK10
REMOVABLE SPLIT LID HINGES IN THE CENTER	EN	311711	UK10
RP-1194 HINGE SET	EN	302083	UK10

The search results appear.

Double-click on the desired material to populate the Component field.

Planning Materials on an Order



* Create Corrective (Repair) : Component Overview

Order REPR %0000000001 Repair doorreplace closer

Sys.Status CRTD MANC NEW

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

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	Plant
0010	300282	Ball Bearing Butt Hinge 4 1/2 x 4 1/2 Hv			2	ST	L	UK10
0020								UK10
0030								UK10
0040								UK10
0050								UK10

Enter the quantity required.

The unit of measure and item category fields will populate automatically.

Repeat for each component.

Component Item Category



* Create Corrective (Repair) : Component Overview

Order: REPR %0000000001 Repair door/replace closer
 Sys.Status: CRTD MANC NEW

HeaderData Operations Components Costs Objects UK Fields

Item	Component	Description	LT	Reqmnt Qty	U	IC	Loc	Plnt
0010	300282	Ball Bearing Butt Hinge 4 1/2 x 4 1/2 Hv		2	S	L	UK10	
0020	309072	CLOSER DOOR CORBIN R		1	E	N	UK10	
0030							UK10	

ICT Item category te...
 L Stock item
 M Intra material
 N Non-stock item
 R Variable-size item
 T Text item

Automatic Purchasing Requisition Information



Change Corrective (Repair) 807000000057: Component Detail Purchasing

Requirement qty	1	EA	Sort string	
Price	123.45		per	1 EA
Material Group	PM000001		G/L Account No.	533030
Purch. group	000 / UK00		Vendor	126220
Agreement		/ 0	Info record	
Goods recipient	A. Taylor		Unloading Point	Room 276
Requisitioner	B. Fife		Tracking Number	
Plnd dely time			GR proc. time	
Vendor Mat. No.	SuperPro Exhaust Fan			

For non-stock materials, an automatic purchase requisition is created in the background.

You do not see this dialog box.

Text Component Item Category



* Create Corrective (Repair) : Component Overview

Order: REPR %0000000001 Repair door/replace closer
 Sys. Status: CRTD MANC NEW

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

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	PInt
0010	300282	Ball Bearing Butt Hinge 4 1/2 x 4 1/2 Hv			2	ST	L	UK10
0020	309072	CLOSER DOOR CORBIN RUSSWIN DC6...			1	EA	N	UK10
0030		Bring a 9 foot ladder				T		UK10
0040								UK10
0050								UK10

The Item Category field will populate automatically based on the component specified – BUT if you enter a text note, you must select T for Text item.

- IC Item category te...
- L Stock item
 - M Intra material
 - N Non-stock item
 - R Variable-size item
 - T Text item**

Component Item Category



* Create Corrective (Repair) : Component Overview

Order: REPR %0000000001 Repair door/replace closer
 Sys. Status: CRTD MANC NEW

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

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	PInt
0010	300282	Ball Bearing Butt Hinge 4 1/2 x 4 1/2 Hv			2	ST	L	UK10
0020	309072	CLOSER DOOR CORBIN RUSSWIN DC6...			1	EA	N	UK10
0030		Bring a 9ft ladder				ST	T	UK10

- IC Item category te...
- L Stock item
 - M Intra material
 - N Non-stock item
 - R Variable-size item
 - T Text item**

Stock Materials – Availability



University of Kentucky Change Maintenance order 4000031: Component

Order: PM01 4000031 Order to demonstrate stock materials

NEW

Objects

Reqmnt Qty	UM	IC	SLoc	Plnt
1	EA	L		UK00
				UK00

0130
0140
0150
0160
0170
0180

Gen. Data Purchasing **Material Availability** List Graph... Asse... Material Where-Used

All checked materials in order 4000031 are available

Future Enhancement

You will be able to check materials available using the Material Availability icon



Non-file Materials



* Create Corrective (Repair) : Component Overview

Order: REPR %0000000001 Repair door/replace closer

Sys. Status: CRTD MANC NEW

HeaderData Operations Components Costs Objects UK Fields

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	Plnt
0010	300282	Ball Bearing Butt Hinge 4 1/2 x 4 1/2 Hv			2	ST	L	UK10
0020	300072	CLOSER DOOR CORBIN RUSSWIN DC6...			1	EA	N	UK10
0030		Bring a 9 foot ladder				ST	T	UK10
0040		Type 2756 Door Lock - Geoffery Swipe			1	ea		UK10
0050								UK10

For a non-file component, enter a description, quantity, and unit of measure.

Press the Enter key to proceed.

Non-file Materials



Requirement qty	1	EA	Sort string	
Price			per	1 EA
Material Group	PM000001		GL Account No.	
Purch. group	000 / UK00		Vendor	
Agreement		/ 0	Info record	
Goods recipient			Unloading Point	
Requisitioner			Tracking Number	
Plnd delay time			GR proc. time	
Vendor Mat. No.				

This box will appear, asking for the information required by Purchasing.

Purchasing Information - Reference Only Slide



Information required to order non-stock materials:

- **Requirement Quantity** - How many are needed? (defaults from what was entered on the Components tab)
- **Price** - Cost of material (defaults from Components tab)
- **Material Group** - PM000001 for PM Non-Material Master **Material**, 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 requisitioning the material?
- **Unloading Point** - Where should material be delivered?
- **Vendor Material Number** - Description of the material

Calculating Planned Components Cost



When you Save the Work Order, all Costs are calculated.

* Create Corrective (Repair) : Component Overview

Order: REPR %000000000001 Repair door/replace closer

Sys.Status: CRTD MANC NEW

HeaderData Operations Components Costs Objects UK Fields

Item	Component	Description	LT	Reqmnt Qty	UM	IC	SLoc	Plnt
0010	300282	Ball Bearing Butt Hinge 4 1/2 x 4 1/2 Hv			2	ST	L	UK10
0020	309072	CLOSER DOOR CORBIN RUSSWIN DC6...		1	EA	N		UK10
0030		Bring a 9 foot ladder				ST	T	UK10
0040		Type 2756 Door Lock - Geoffery Swipe		1	EA	N		UK10
0050								UK10
0060								UK10

To see the calculated cost now...

After entering the components, click on the **Determine Costs** icon.

Planned Cost Display



* Create Corrective (Repair) : Cost Overview

Order: REPR %000000000001 Repair door/replace closer

Sys.Status: CRTD MANC PRC NEW

HeaderData Operations Components Costs Objects UK Fields

Estimated costs: 0.00

Report planned/actual

Overview Costs Key fig

Group/Descrptn	Est costs	Plan costs	Act costs	C..
Costs	0.00	641.48	0.00	U...
Labor	0.00	102.68	0.00	U...
Purchased Material	0.00	257.50	0.00	U...
Stock Material	0.00	281.30	0.00	U...

Note that all planned costs are displayed on the Costs Overview tab. Services are handled the same way as a non-stock material purchase.

Planning Materials on an Order



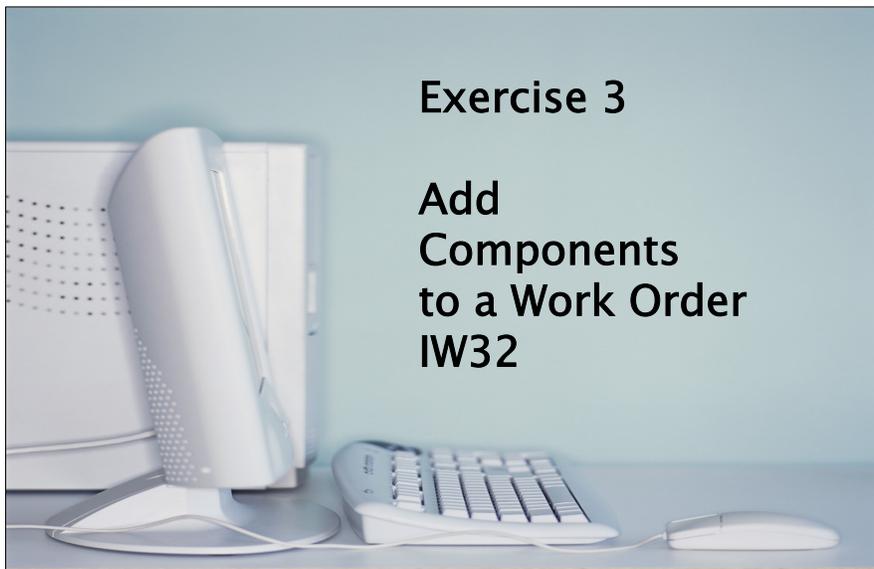
Group/Descrptn	Est. costs	Plan costs	Act. costs	C...
Costs	0.00	641.48	0.00	U...
Labor	0.00	102.68	0.00	U...
Purchased Material	0.00	257.50	0.00	U...
Stock Material	0.00	281.30	0.00	U...

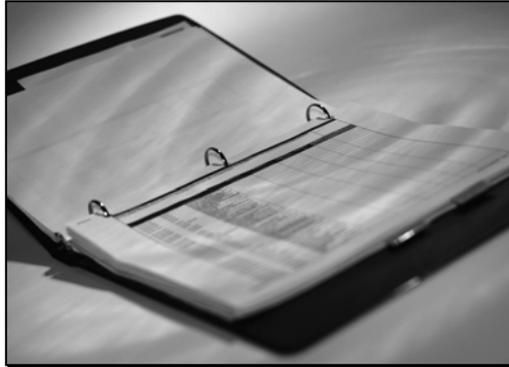
Unit 5 - PM Materials



Exercise 3

Add
Components
to a Work Order
IW32





Work Order List Displays

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 functionality can provide detail.

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



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

Order status
 Outstanding In process Completed Historical Sel.profil | Addr. X

Order selection

Order		to		➡
Order Type		to		➡
Functional location		to		➡
Equipment		to		➡
Material		to		➡
Serial number		to		➡
Addit. device data		to		➡
Notification				
Main work center				
Plant for WorkCenter				
Period				
Partners				
Currency				

To display specific work orders, you can set criteria such as Order number, Type, and/or Functional Location, etc. To search on any field, click on the Possible Entries icon for that field.

Multi-Level Order List Display - IW40



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

Order status
 Outstanding In process Completed Historical Sel.profil | Addr. X

Order selection

Order		to		↔
Order Type		to		↔
Functional location		to		↔
Equipment		to		↔
Material				
Serial number				
Addit. device data				
Notification				
Main work center		to		↔
Plant for WorkCenter		to		↔
Period	12/16/2006	to	03/16/2007	
Partners				
Currency				

After filling in the criteria, click the Execute icon.

Multi-Level Order List Display - IW40



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

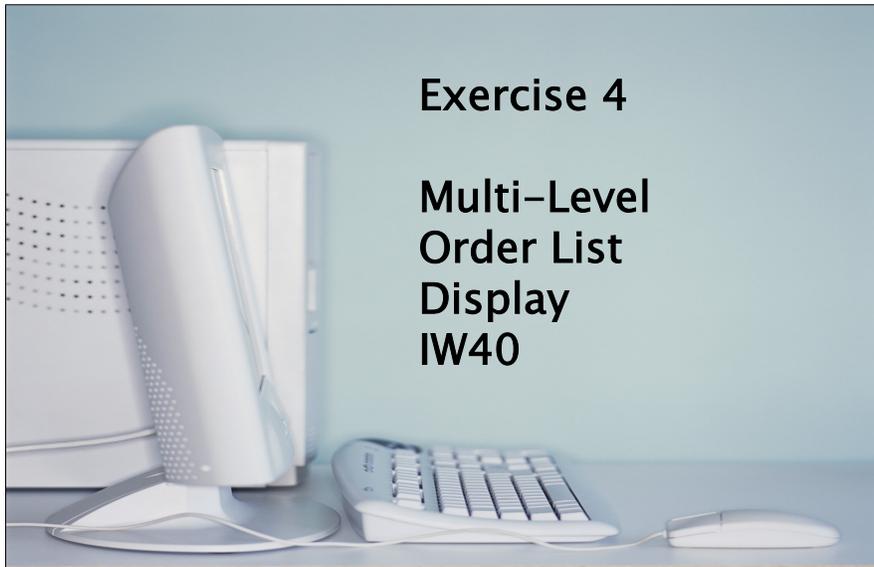
Color Legend

- ColorAssignment
- Order
- Partners
- Funcnl Loc.
- Equipment
- Notification
- Operation
- Confirmation
- Component
- Utilities
- Suborders
- Permit
- Issue Permit
- Goods Movements
- Relationships
- Costs/Revenue

Order information is displayed. The legend is shown here.

807000000000 REPR Test Order	UNASSIGN CPPD	75.00	
0010 Test Order	KPPS	0.00	
807000000001 REPR Test Order	REL PCNF PPRT PRC SETC	75.00	
0010 Test Order	UNASSIGN CPPD	0.00	
0000000002	0.500 H	0.00	
0000000002	0.330 H	12.45	
UK10 NonFile Item to Order	RKL	12.50	
0000000101	0.170 H	0.00	
0000000101	0.330 H	0.00	
0000000101	1 H	0.00	
LABOR	RKL	29.25	
LABOR	RKL	38.17	
807000000021 REPR	REL NHAT PRC SETC	0.00	
LX-0005	F. D. PETERSON SERVICE	UNASSIGN CPPD	0.00
0010	UNASSIGN CPPD	0.00	
807000000022 RENW Air conditioner will not cool	REL NHAT PRC SETC	0.00	
LX-0293	University of Kentucky Hospital	UNASSIGN MPPD	0.00
0010 Air conditioner will not cool	UNASSIGN MPPD	0.00	

Unit 6 – Work Order List Displays



Exercise 4

Multi-Level Order List Display IW40

List Display Orders – IW39



*** Display PM orders: Selection of Orders**

⏪ | Settlement Receiver | PRT | ✖ Exit without Saving

Order status
 Outstanding In process Completed Historical Sel.profil | Addr. ✖

Order selection

Order		to		↔
Order Type		to		↔
Functional location		to		↔
Equipment				
Material				
Serial number				
Addit. device data				
Notification				
Main work center				
Plant for WorkCenter				
Period	12/16/2006	to	03/16/2007	
Partners				
Currency				

General Data/Administrative Data
 incl.object list
Leading order

To display certain work orders, you first specify your criteria, such as Order Status, Type, and Functional Location.

List Display Orders - IW39



*** Display PM orders: Selection of Orders**

Order status

Outstanding
 In process
 Completed
 Historical
 Sel.profil

Order selection

Order
 Order Type
 Functional location
 Equipment
 Material
 Serial number
 Addit. device data
 Notification
 Main work center
 Plant for WorkCenter
 Period: 12/16/2006 to 12/31/9999
 Partners
 Currency

Our criteria will display a list of REPR (Repair) Work Orders that are **Outstanding** (Not Released) or **In process** (Released).

Click on the Execute icon. 

Display the List



*** Display PM orders: List of Orders**

S	Order	Type	Bsc start	Short text	PlanTotCos	ActTotCost
	807000000000	RE...	02/12/2007	Test Order	75.00	0.00
	807000000001	RE...	02/06/2007	Test Order	87.45	20.75
	807000000020	RE...	02/09/2007		0.00	67.42
	807000000021	RE...	02/09/2007		0.00	0.00
	807000000024	RE...	02/20/2007	Test send WO to Customer	0.00	0.00
	807000000025	RE...	02/15/2007	Test send to email in envelope	0.00	0.00
	807000000026	RE...	02/20/2007	Fix this heat pump	300.00	0.00
	807000000027	RE...	02/13/2007	Fix door handle	0.00	50.00
	807000000029	RE...	02/14/2007	Test email		
	807000000030	RE...	02/14/2007	Email testing		
	807000000031	RE...	02/20/2007	Testing email		
	807000000040	RE...	02/22/2007	Test Order with		
	807000000041	RE...	02/22/2007	A second order		
	807000000064	RE...	02/21/2007	Integrated Testing -REPR	102.68	0.00
	807000000066	RE...	03/01/2007	Int Test 2 REPR	51.34	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.

S	Order	Type	Bsc start	Short text	PlanTotCos	ActTotCost
	807000000000	RE...	02/12/2007	Test Order	75.00	0.00

Columns

Column Name
Selected line
Order
Order Type
Basic start date
Short text
Total planned costs
Total actual costs

Column set

Column Name
ABC indicator
Reference date
Address Number
Reference time
Change date for
Last changed by
Available to date
Available to time
Asset
Sub-number

Change the Layout



* Display PM orders: List of Orders

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 once.

S	Order	Type	Bsc start	Short text	PlanTotCos	ActTotCost
	807000000000	RE...	02/12/2007	Test Order	75.00	0.00

Columns

Column Name
Selected line
Order
Order Type
Basic start date
Short text
Total planned costs
Total actual costs
Functional location

Column set

Column Name
Entered by
Equipment
Estimated costs
Group
Group Counter
History from
Last changed by

Change the Layout



* Display PM orders: List of Orders

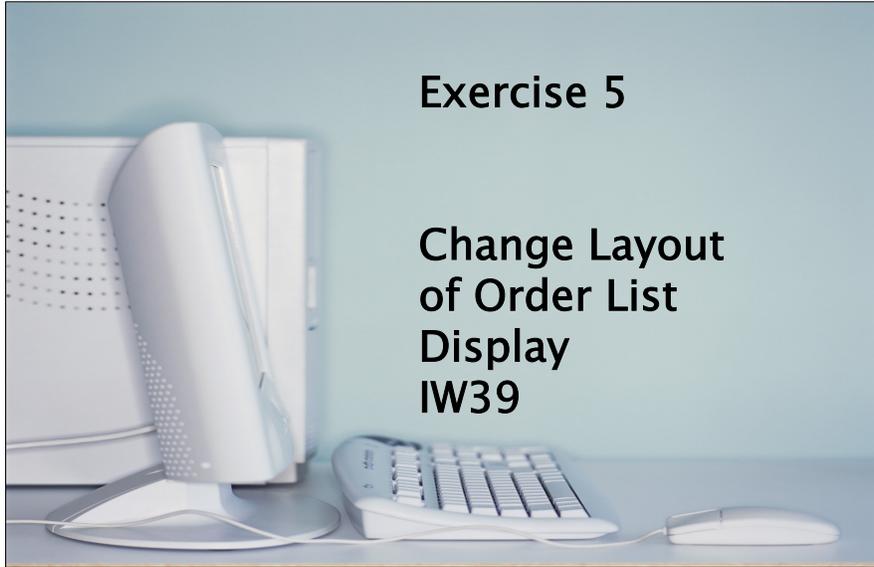
S	Order	Type	Bsc start	Short text	PlanTotCos	ActTotCo...	FunctLocation
	807000000000	RE...	02/12/2007	Test Order	75.00	0.00	LX
	807000000001	RE...	02/06/2007	Test Order	87.45	20.75	LX
	807000000002	RE...	02/09/2007		0.00	67.42	LX-0005
	807000000021	RE...	02/09/2007				
	807000000024	RE...	02/20/2007	Test send WO to Customer			
	807000000025	RE...	02/15/2007	Test send to email in envelope			
	807000000026	RE...	02/20/2007	Fix this heat pump			
	807000000027	RE...	02/13/2007	Fix door handle	0.00	50.00	LX-0293
	807000000029	RE...	02/14/2007	Test email	0.00	0.00	LX-0293
	807000000030	RE...	02/14/2007	Email testing 3	0.00	0.00	LX-0063
	807000000031	RE...	02/20/2007	Testing emial 4	0.00	0.00	LX-0005
	807000000040	RE...	02/22/2007	Test Order with Object List	1.92	215.00	LX-0293
	807000000041	RE...	02/22/2007	A second order with an Object List	0.94	6.25	LX-0293
	807000000064	RE...	02/21/2007	Interorated Testing -REPR	102.68	0.00	LX-0005

The new layout appears.

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 that 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.



Exercise 5

Change Layout of Order List Display IW39

Course Summary

You should now have an understanding of:

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



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