

# CHANGE TO SAP MAINTENANCE REQUESTS AND CREATION OF WORK ORDERS

Anticipated Implementation February 2019

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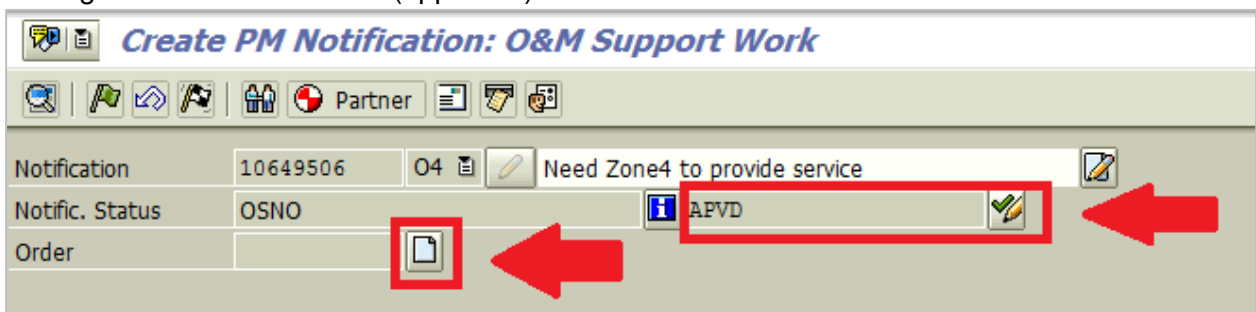
## Buildings and Grounds

### Overview of Current Process

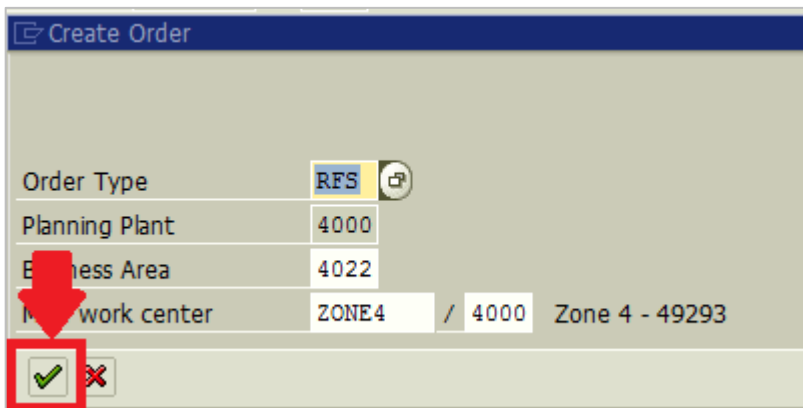
Currently all Department Requestors, anyone that can create a work order in SAP/Personas, can create and approve notifications (work requests) and create work orders directly. These work orders go directly to supervisors of zones/shops. The current process is included below.

#### SAP GUI steps

1. Change user status to APVD (approved). Click document icon to create new order.

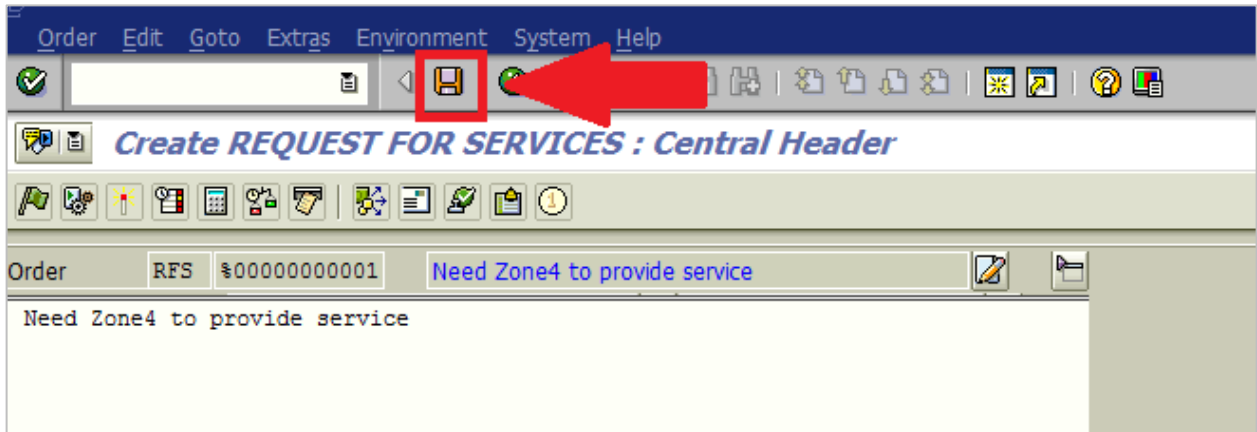


2. From Create Order pop-up, select correct work center and click green check.



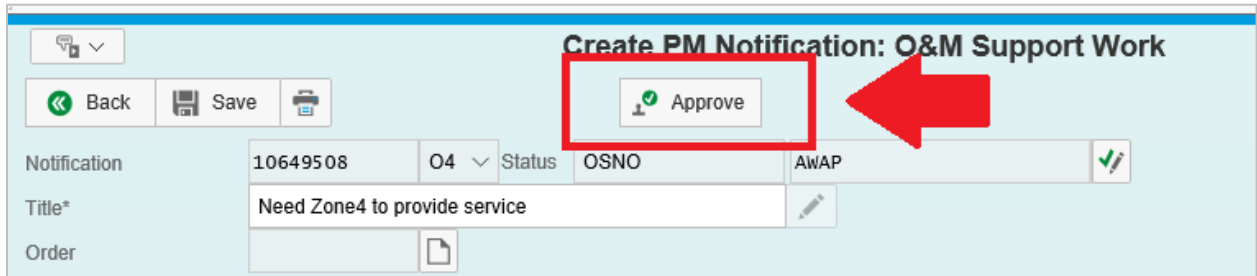
**Buildings and Grounds**

- 3. Save the work order by clicking the save icon.

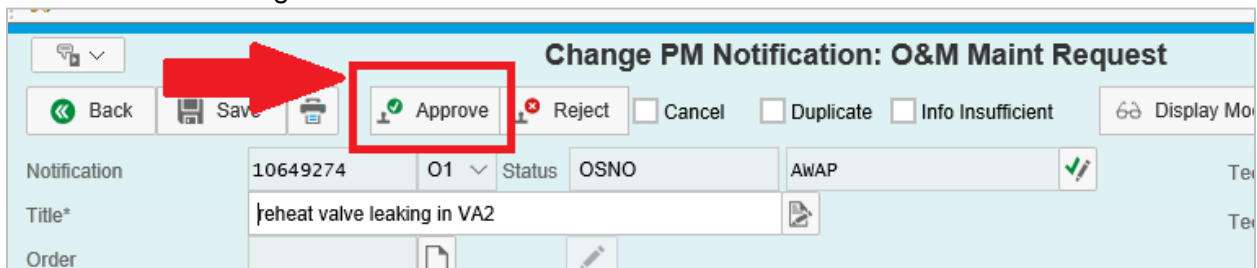


**Personas steps**

- 1a. When creating a new request in the system manually, click the approve button.



- 1b. When approving current notifications from Fix It or saved for later approval, click the approve button from the change screen.



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2. Enter main work center and click green check.

The screenshot shows a 'Create Order' dialog box with the following fields:

|                  |                             |
|------------------|-----------------------------|
| Order Type       | RFS                         |
| Planning Plant   | 4000                        |
| Business Area    | 4022                        |
| Main work center | ZONE4 / 4000 Zone 4 - 49293 |

A red arrow points to a green checkmark icon in the bottom right corner of the dialog box.

3. Save the work order.

The screenshot shows the 'Create REQUEST FOR SERVICES : Central Header' window. The 'Save' button is highlighted with a red box, and a red arrow points to it. The window contains the following information:

Order: RFS %000000000001 Need Zone4 to provide service

Need Zone4 to provide service

1. HeaderData 2. Operations 3. Components 4. Costs 5. objects 6. Planning Enhancement

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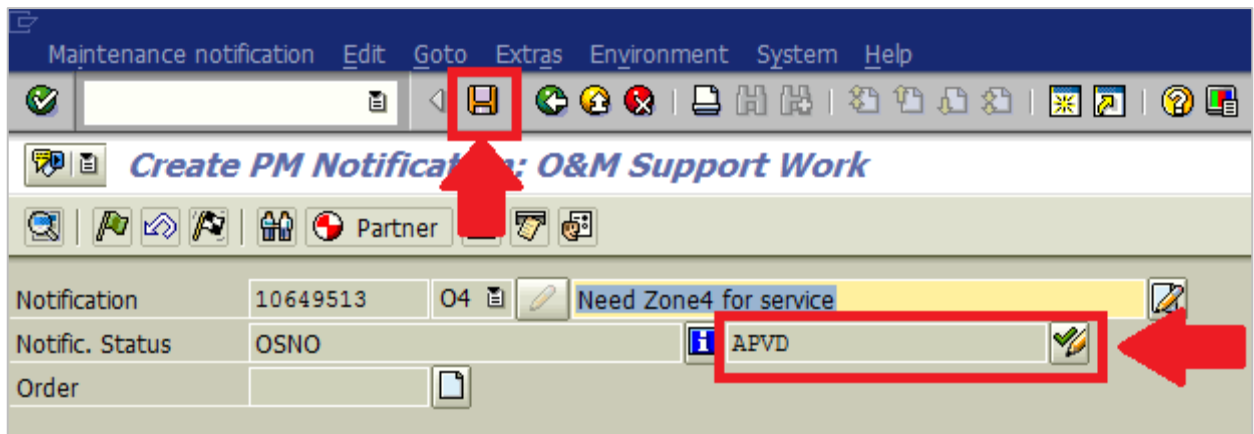
### Frequently Asked Questions

#### A. What is changing?

Going forward, Department Requestors in SAP/Personas will be able to create and approve notifications, and the Work Request Center will review approved notifications and create the work order directly. Instructions to create and approve notifications upon implementation of the pending SAP change are included below.

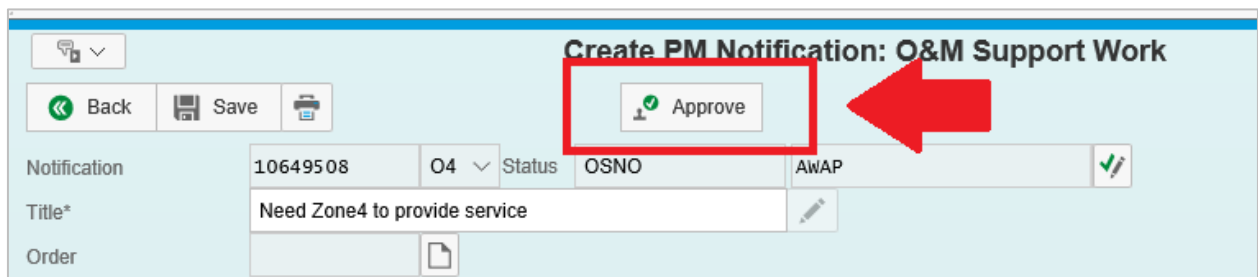
#### Future SAP GUI steps

1. Set APVD status and click save icon. The Work Request Center will receive this request and create the work order to ensure that financials and order type are correct.



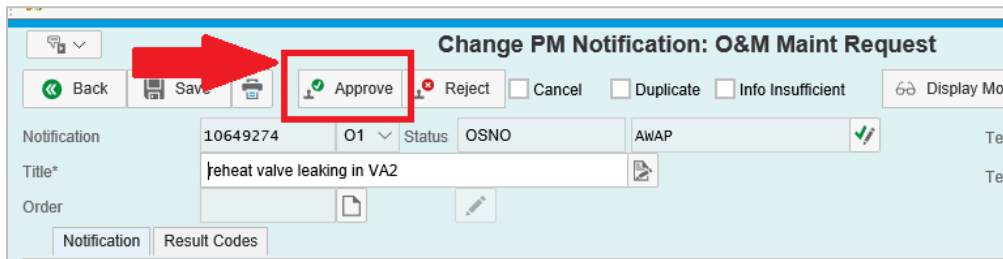
#### Future Personas steps

- 1a. When manually creating a new request, click approve. The Work Request Center will receive this request and create the work order to ensure that financials and order type are correct.



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- 1b. If approving a request from Fix It in change mode, click approve. The Work Request Center will receive this request and create the work order to ensure that financials and order type are correct.



### **B. Who does this change affect?**

This change affects all Department Requestors of work in SAP, specifically individuals who have **only** one or more of the following security roles in SAP:

- PM175: Notification Approver
- PM200: Department Requestor
- PM800: PM Display

### **C. What if I'm a technician or supervisor in Physical Facilities or a Maintenance Clerk in a Physical Facilities department? Will I still be able to create work orders?**

Yes. Users with the following roles will still be able to create internal work orders as needed:

- PM205: Maintenance technician
- PM210: Supervisor
- PM215: PM Clerk

### **D. What specifically is driving this change since the Enterprise Asset Management (EAM) project recently changed work request steps?**

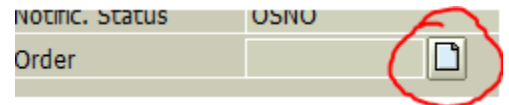
Work requests submitted since October 2017 (when EAM project went live) have been reviewed, and Buildings and Grounds noted the following challenges and solutions:

- **Unintended delays** – Work is currently distributed to a large group of supervisors. Each supervisor takes time to review the request to ensure it's appropriately assigned to their shop and uses their own discretion to determine the priority of work. This often results in delayed processing and completion of work.
  - Having all work requests go to a centralized team (i.e., the Work Request Center) enables more efficient and consistent work prioritization to occur and distributes work to the correct area the first time.

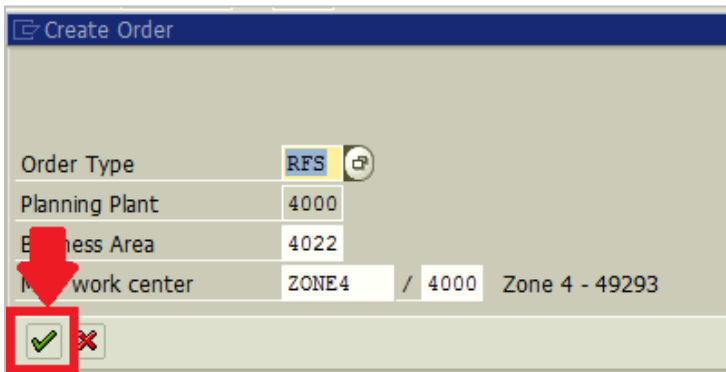
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- **Errors in Work Orders** – Work requests commonly include financial or order type errors. These errors are difficult to correct once they have been posted to work orders due to SAP technical limitations.
  - Incorrect information causes delays in processing work orders, and Buildings and Grounds is unable to analyze work when incorrect order types are used. The Work Request Center will be able to identify errors and initiate communication to obtain correct information prior to a work order being created. This will provide a smoother and more timely transaction.

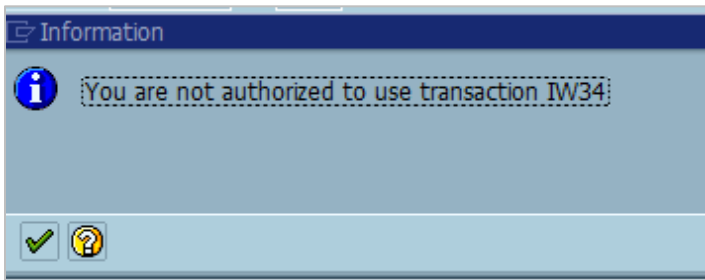
**E. What if I forget about this change and accidentally click the create work order button (shown to the right)?**



You will still get a Create Order pop-up box. Select the green check.



Select the green check again on the following error message to then save the notification and allow the Work Request Center to create the work order for you.





**Buildings and Grounds**

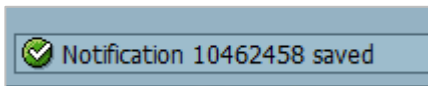
**F. If I can't create the work order, how will I get the work order number?**

When the Work Request Center creates the work order, an email containing the work order number will be sent to the individual listed in these fields:

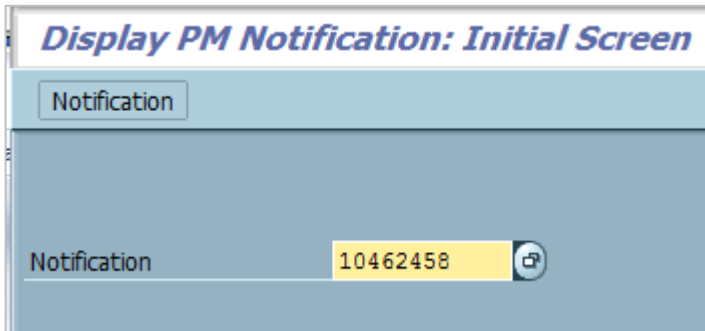
- Building Deputy: (Defaults for the building)
- Staff Contact: User ID
- Reported by: User ID

| Responsibilities |             |  |               |
|------------------|-------------|--|---------------|
| Planner Group    | FBG / 4000  |  | Bldgs &       |
| Main WorkCtr     | NONE / 4000 |  | NONE          |
| Building Deputy  | 90014459    |  | Ullrich Brian |
| Staff Contact    | BDISPEN     |  | Benjamin J    |
| Reported By      | WEILIR      |  | No            |

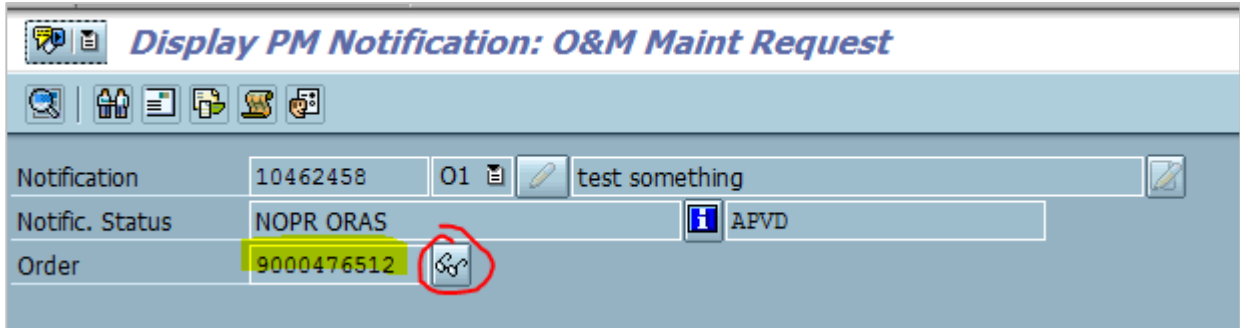
Alternatively, when a notification is created/approved and then saved, a notification number will appear at the bottom of the screen.



Enter this number in SAP using transaction IW23.

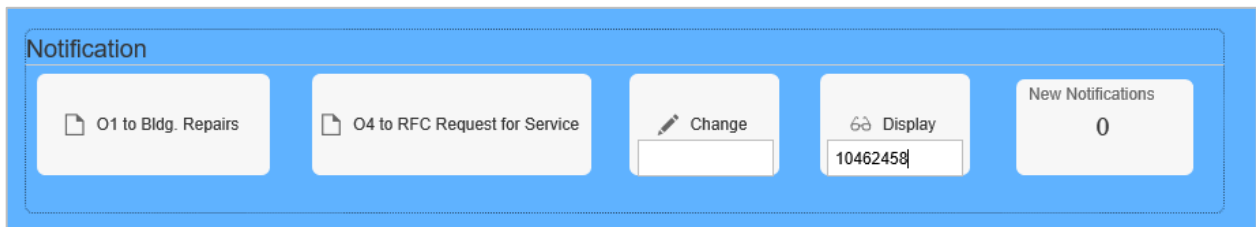


The associated work order number will be listed. Select the eyeglass icon for additional details.



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In Personas, enter the notification number in the “Display” field, then click the tile. The work order number and eyeglasses icon for more information appear in approximately the same place when opening the notification:



### **G. How will the Work Request Center know to create a work order for a request?**

The Work Request Center will regularly monitor the system for approved notifications that do not yet have associated work orders created. They will review the request and create the work order as needed. If the request is missing information or contains potential errors, Work Request Center staff may contact the creator and/or the building deputy for questions.

### **H. Will the Work Request Center create work orders without my knowledge?**

To ensure that critical building repairs are not overlooked, the Work Request Center will monitor the system for aging notifications that have been reported but not approved.

- For all building repairs (Notification type = O1): The Work Request Center may review and approve these requests as needed. These requests are necessary to keep the building in working order and may cause interruption to building occupants and/or impede facility use if not addressed in a timely manner. Because these repairs are funded by Physical Facilities, work will be reviewed as soon as possible without department requestor approval.
- For Department Funded (Notification type = O4) and Affiliate (Notification type = AF) requests: The Work Request Center will not create a work order until a department requestor approves the notification. **This means that notifications that are not reviewed or approved in a timely fashion may go unaddressed.**
  - As a temporary solution while users adjust to this SAP change for the coming weeks, the Work Request Center may follow up with the originator of the request after three business days of non-review/approval for Department Funded and Affiliate requests to ensure users are familiar with system changes.
  - An announcement will be issued minimally in Business @ Purdue when department requestors are expected to review and approve pending requests without the Work Request Center issuing a reminder, likely in March 2019.

**Note:** The Work Request Center is NOT responsible for checking account numbers and/or Business Partner numbers for department funded or affiliate work requests.

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### *I. When is this change happening?*

Technical changes to SAP continue to be tested. Implementation of this change may occur upon completion of testing, on or after February 1. Communication will be sent to all stakeholders if significant delays are expected.