SBCUSD – IT Training Program



SAP Plant Maintenance Notifications



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Document Updates

9/5/2018 – added how to generate a listing of PM Notifications to view or print.

SUPPORT FOR SAP PLANT MAINTENANCE

You may contact the following offices for assistance with the SAP Plant Maintenance system:

Information Technology – Technical Assistance helpdesk@sbcusd.com (909) 888-4357

Training – Training Specialists techtraining@sbcusd.com (909) 386-2550

Security – Logins securityspecialist@sbcusd.com (909) 386-2550

Maintenance & Operations – Owner of procedures (909) 388-6100

Fiscal Services – Budget Analyst (909) 381-1154

Important: To request an install of the SAP software program, contact the I.T. Help Desk at (909) 888-4357 or email helpdesk@sbcusd.com.

Important: To request a login account, have your site administrator send an email to securityspecialist@sbcusd.com and request access to the SAP Plant Maintenance system.

OVERVIEW OF SAP PLANT MAINTENANCE NOTIFICATIONS

A Plant Maintenance Notification is a request to have work done at your site by the Maintenance and Operations Department.

Important: If there is a facility crisis, first call Maintenance & Operations at (909) 388-6100. Then, create a follow up notification in SAP, so that the emergency is documented.

OVERVIEW

- Principals, Secretaries, Building Administrators, and Service Center personnel will initiate
 Maintenance Notifications for Maintenance & Operations.
- Notifications are not an authorization to perform maintenance work activities but a request for services. A Maintenance Order represents the authorization to perform maintenance work activities.
- Factors such as problem/resolution determination, required resources and availability, required parts/materials and availability, financial resources required, and funding availability all affect the response to the notification. Proper classification of a Maintenance Notification is also an essential part of this process.

CRISIS ITEMS

Gaseous or Chemical Odors	Power Outages	
Broken Windows	Roof Leaks Not Associated with Rain	
Sink Holes	Activated Fire Alarm	
No Hot Water in Kitchen/Child	Flooding Inside/Outside	
Care		
Signs of Smoke or Fire	Windows or Doors that Cannot be	
	Secured	
Excessive Water Leakage		

GLOSSARY OF TERMS

PLANT MAINTENANCE NOTIFICATION

A notification is a request for work. This must be created from each site so that Maintenance & Operations is aware that work needs to be done.

WORK ORDER

The work order is the document that gives the "go-ahead' for maintenance work to proceed. It contains the plan of where, when, how, and by whom the work will be done.

NOTIFICATION TYPE

The notification type determines the kind of maintenance and the department scheduled to do the work. Notifications can be corrective (11) or special order (41). Notification types PM 11-53 are created by the sites and will go to Maintenance & Operations, PM 71-73 are only created by Nutrition Services staff.

TRANSACTION TYPES

Create Plant Maintenance Notifications	IW21
Change a Plant Maintenance Notification	IW22
Check status of a Plant Maintenance Notification or Work	IW23

FUNCTIONAL LOCATION

A functional location refers to an organization unit that is to be maintained, such as a school or other building site for example: Belvedere Elementary 01-108.

STATUS

This lets everyone know what the progress is for any particular work order. There are several business transactions involved in issuing a work order status: Posting time and other follow-up costs after the job has been technically completed (TECO).

TYPES OF PLANT MAINTENANCE NOTIFICATIONS

- FACILITY CORRECTIVE (11) This is maintenance that will fix something that is broken. This is the type that you will create most often. For Example: fixing an air conditioner problem or broken window.
- CUSTODIAL RUN CHANGE REQUEST (15) This is a non-maintenance upgrade. It is used when your site needs custodial runs (duties) changed or reviewed.
- FACILITY SPECIAL ORDER (41) This is a non-maintenance upgrade that is funded by the site. For example: a special order could be the building a new fence.
- FLEET CORRECTIVE (51) This is maintenance that will repair a vehicle. For example: a radiator leak, flat tire, or tail light out.
- FLEET SPECIAL ORDER (53) This is a non-maintenance upgrade. For example: installing additional lights, modifying a trailer, installing a lift gate, or auto body repair due to an accident.
- NUTRITION CORRECTIVE (71) (Nutrition Services Staff only) This type is maintenance that will fix something that is broken in a kitchen. The item being reported is not in the walls, floor, or ceiling. An exception to this might be an outdoor BBQ at a High School. For example: a walk-in freezer temperature is too high.
- NUTRITION SPECIAL ORDER (73) (Nutrition Services Staff only) This is a non-maintenance upgrade that is funded by the site. For example: a special order could be the building a new fence.

LOGGING IN AND OUT

The steps in this lesson will instruct you on how to log in and log out of the SAP system.

LOGGING IN

1. Double-click the **SAP Logon** icon on your desktop.

This will open the SAP Logon window.



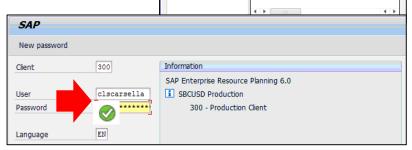
2. Click on the **Connections** folder in the left pane, and then **SAP System** in the right pane

If these items are missing, contact the I.T. Help Desk at (909) 888-4357.

3. Click the Log On button in the upper left.

This will open the SAP login screen.

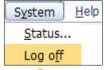
- 4. In the User field, enter the **user name** given to you by the I.T. Security Specialist.
- 5. In the Password field, enter the **password** given to you by the I.T. Security Specialist or the one you created.
- Press the Enter key or click the Enter icon.



Note: SAP will force you to **change your password** when logging in for the first time. Enter a New password and Confirm the password. The next time you log in, you will have to use your new password.

LOGGING OUT

- 1. Click on **System** in the Standard Tool bar.
- 2. Click on Log off.



If you do not see the menu bar, use the Log off 🧟 icon.

Note: Read all system messages to make sure you save any data that you have entered.

CHANGE YOUR PASSWORD

- 1. At the login screen, enter your **user name** and **password**.
- 2. Click on **New password** in the upper left corner.
- 3. Follow the screen prompts.
- 4. Click on the **green check mark** to SAVE changes.



ADDING THE PM NOTIFICATION TO YOUR FAVORITES LIST

The steps in this lesson will show you how to add an SAP transaction code to your Favorites folder on the SAP Easy Access Menu.

Manual Entry of a Transaction

iw23

Transaction Code

ADD TRANSACTION CODE

- 1. Click on the Favorites menu.
- 2. Choose Insert Transaction.
- 3. In the Transaction Code field, enter the desired transaction code (e.g., IW21, IW22, or IW23).
- 4. Click the **Continue** icon.



DISPLAY TRANSACTION CODES

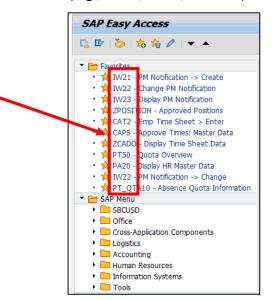
If the transaction codes are not displaying within the Favorites area, follow the steps below.

- 1. Click on the Extra menu.
- 2. Choose **Settings**.
- 3. Click to check the **Display Technical Names** option.
- 4. Click the **Continue** icon.



DELETE TRANSACTION CODE

- 1. **Right-click** on the transaction code.
- 2. Click **DELETE**.



✓ X



CREATING A PM11 (PLANT MAINTENANCE NOTIFICATION)

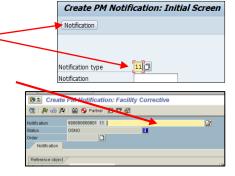
CREATING A PM11 NOTIFICATION (GENERAL MAINTENANCE/REPAIRS)

1. From the SAP Easy Access menu, in the Command Field, enter IW21 and press Enter.

Note: If the Command Field is missing, click the expand arrow, top left corner of screen, to unhide it.

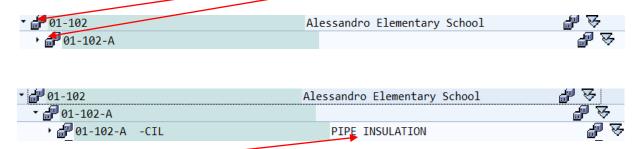
- 2. In the **Notification type** field, type **11**.
- 3. Press Enter or click the Notification button.
- 4. In the **Notification Title** field, enter a short title/description for the notification.
- 5. In the **Reported by** field, type the last name and first initial of the person reporting the problem.
- 6. Click in the **Functional loc.** field and type 01-### (where ### equals your 3-digit site number).

Example: 01-795.



7. To the right of the Functional loc. field, click on the Structure List Icon to bring up the buildings, spaces and rooms. Functional loc.

8. Click on the triangle next to the building.



01-102

- 9. The available rooms for that building will appear. Double click on the **room** that applies.
- 10. Enter a detailed **description** for this PM notification.

DESCRIPTION EXAMPLES

The Description entry MUST HAVE A DETAILED DESCRIPTION OF WHAT THE PROBLEM IS.

Example: ROOM D-2 A/C blowing hot air.

If there is a toilet leaking, writing "toilet" is not sufficient. Please write A-wing girls' restroom toilet leaking.

Graffiti may be listed as "throughout site" here. A vandalism report will be created for each graffiti notification.

Air Conditioning must be separated by wings. Do not put separate wings on the same work order. Do not state that an entire wing is without air conditioning unless every room is verified.

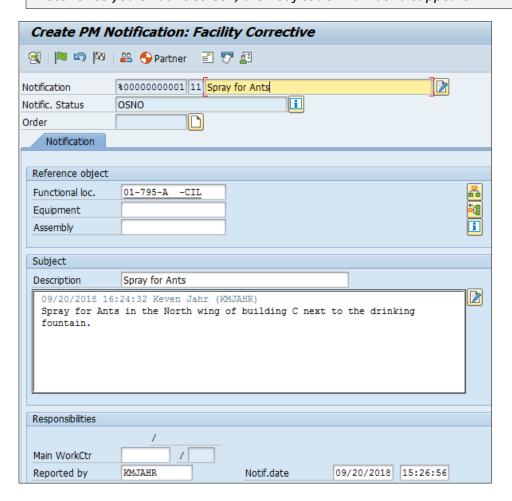
All other problems must be separated by classroom. Each job must have its own separate work order. Do not combine jobs on one work order even if all jobs are the same type of problem.

Example: J-1 no power to electrical outlet, or, B-3 no power to electrical outlet, or, B-3 Lights are not turning on

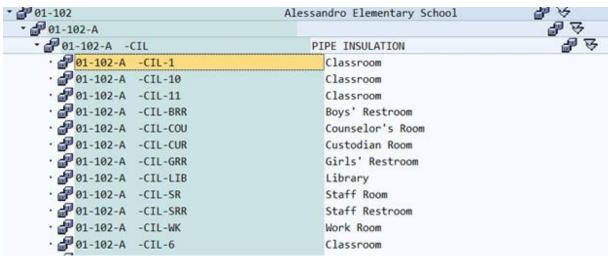
Each of these must have their own notification made.

- 11. Click the **Save** icon (Standard toolbar) to save the notification. \square
- 12. Write down the Notification # (very bottom left corner) so that you can refer to it whenever you call Maintenance and Operations.

Note: Once you exit this screen, the notification number disappears.



SAP BUILDING & FUNCTIONAL SPACE CODES



BUILDING CODES

A, B, C, etc.--building identification letter

ADM--administration

AUD—auditorium (Pacific, San Bernardino, San Gorgonio schools only)

CAF--food service area, kitchen

EXT--playground, parking lots, grass, trees (use building letter and EXT below for items on or attached to the exterior of buildings)

MU--multi-use room, student dining

PE -- all buildings in PE area

FUNCTION LOCATION CODES

CIL--ceiling area or above ceiling area (non A/C or non-Plumbing)

DOR--doors, hardware, locks

EQU--equipment, office machines, movement of supplies, fire extinguishers

EXT--exterior of building (use with building letter only for items on or attached to the exterior of buildings use with EXT above for items that are not attached to building but are outside)

FLR--floor, carpet, tile or anything attached to the floor which must be moved (non A/C or non-Plumbing)

HVA—air conditioning, heating, ice machines in PE areas or Staff Rooms

PLU--plumbing, any piping, plumbing fixtures, water heater

ROF--roof, roofing materials, top of buildings (non A/C or non-Plumbing)

WAL--walls to be used for any service which will penetrate walls or deface them, such as hang pictures, install phones, move walls or cut holes in them (non A/C or non-Plumbing)

WIN--windows, replace glass, repair window frames

PRINT NOTIFICATION

Important: Print your Notification immediately. Once it becomes a Work Order, it cannot be printed.

1. From the SAP Easy Access menu, in the Command Field, enter IW23 and press Enter.

The Notification # that you just created should be displayed in the field. If not, type it in.

2. Click in the **Notification field** and press **Enter**. Skip Steps 3 through 6 if you know the notification number.

SEARCH FOR PM NOTIFICATION NUMBER

- 3. If you don't know the number, click the **Find Entries** icon to the right of the field and complete steps 4, 5, and 6.
- 4. Enter **01** (a dash) and your **Functional Location number** followed by an asterisk (01-###*).
- Enter a Beginning and Ending Notification date in the Notification date field and click the Execute icon.
- Double-click on the desired notification to place the notification number in the Notification field and press enter.
- 7. Click the **Print** icon.



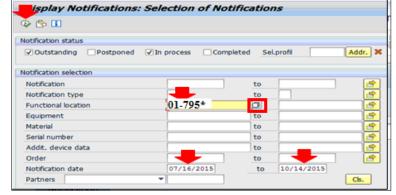
- 8. **Highlight** the notification row using the Select Row button to the left of the row.
- 9. Click the **Print**/Fax icon.





The Print window will display.

Note: If your notification has already been turned into a Work Order, use your Print Screen (PrtScn) button on your keyboard in order to print.





CREATING A PM15 NOTIFICATION (CUSTODIAL RUN CHANGE)

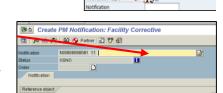
This lesson will show you how to create a custodian run (duty) change. For example, added 2 rooms that need cleaning, putting the flags up and taking down.

CREATING A PM15 NOTIFICATION (CUSTODIAL RUN CHANGE)

1. From the SAP Easy Access menu, in the Command Field, enter IW21 and press Enter.

Note: If the Command Field is missing, click the expand arrow, top left corner of screen, to unhide it.

- 2. In the **Notification type** field, type **15**.
- Press Enter or click the Notification button.
- 4. In the **Notification** Title field, enter a short title/description for the notification.
- 5. Click in the **Functional loc.** field and type 01-###, e.g.,01-795. You do not use a full Structure List for 15's.



6. In the **Description** field, type a more detailed description and location of the problem.

DESCRIPTION EXAMPLES

We have added two kindergarten rooms B-1 and B-2. Please add this to one of our night runs. Night Run B does the other three kindergarten rooms C-2, K-1, and K-2. Also, Jane Doe, who is doing Night Run B, feels her run already has more work than John Doe's Night Run A.

Room B-7 is missing from the run sheet and Night Run A cleans this room. Also, trashing of C-3 through C-6 is not on the run either.

Our day custodian takes the flags down, but it is on the night custodian's run. Can you make this change?

Each of these must have their own notification made.

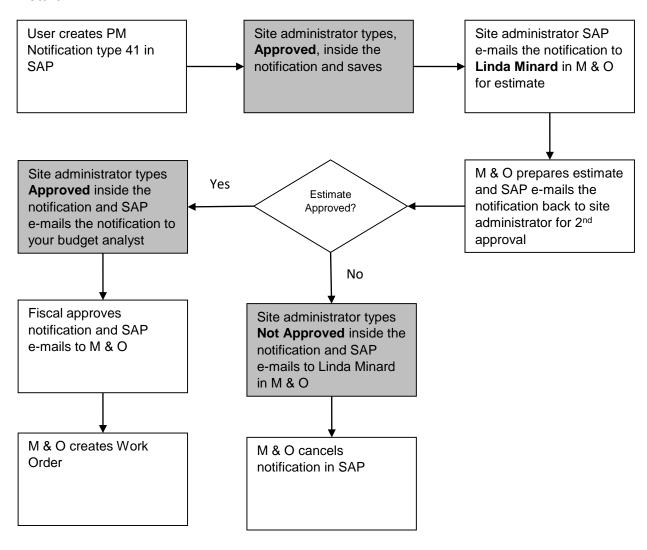
- 7. In the **Reported by** field, type the last name and first initial of the person reporting the problem.
 - You have up to 12 characters to enter a name.
- 8. Click the **Save** icon to save the notification.
- 9. Write down the **Notification #** (very bottom left corner) so that you can refer to it whenever you call Maintenance and Operations. Notification 90000063 saved
- 10. **Print** using instructions above.

Note: Once you exit this screen, the notification number disappears.

OVERVIEW OF A PM41 NOTIFICATION - SPECIAL ORDER

Special Order notifications are different than a normal notification in that your department pays for the maintenance being requested. The flowchart that appears below details the path a special order notification takes and the approvals needed before the work can begin.

Start



Finish

Note: The grey boxes are tasks the approver takes in the process.

Note: Administrator names noted above may change at any given time within SAP.

CREATING A PM41 (SPECIAL ORDER NOTIFICATION)

This type of notification incurs charges to a budget that you will identify. It is used for things like building and mounting a bookshelf, making extra keys, installing an overhead projector, resurfacing the parking lot, or transferring equipment from site-to-site.

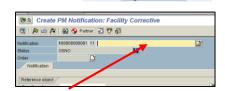
Note: Equipment transfers from **site-to-warehouse** and vice versa, records storage, shredding, and recycling, do not require a PM Notification. Contact the Warehouse Department at (909) 388-6137 for more information on these types of transfers.

1. From the SAP Easy Access menu, in the Command Field, enter IW21 and press Enter.

Note: If the Command Field is missing, click the expand arrow icon `(top left corner of screen) to unhide it.



- 2. In the **Notification type** field, type **41**.
- 3. Press Enter or click the Notification button.
- 4. In the **Notification Title** field, enter a short title/description for the notification.
- 5. Click in the **Functional loc.** field and type 01-###, e.g.,01-795. You do not use a full Structure List for 41's.



Create PM Notification

For non-school sites, use the codes below. Contact Maintenance & Operations for assistance with additional codes.

BOE = 01-714	Printing Services = 01-764	
Transportation = 01-898	WHAA = 01-900	
SMART = 01-795	Warehouse = 01-908	

- 6. In the **Description** field, describe in detail what action you want to request of Maintenance and Operations.
- 7. In the **Reported by** field, enter the name of the person M & O would contact for any questions.

Note: If this is a site-to-site equipment transfer, enter the BU-133 number into the description field. See instructions on how to enter a PM Notification for site-to-site equipment transfers in this manual.

ENTERING A BUDGET NUMBER

Note: for assistance with finding these codes, refer to the summary below, ask your site administrator, open an existing PM Notification Type 41, or contact your budget analyst.

FUNDS CENTER

1. Enter a Fund Center number.

The first 3 numbers are your "School" code (795).

The second 3 numbers are the "Management" code (174).

Funds Center	7951741110	
Fund	01180113	
Functional Area	1000	

The **last 4 numbers** are the "**Goal**" code, which are usually 0000 for Undistributed or **1110** for Regular General Education.

FUND

2. Enter a Funds number.

The Fund in SAP is the combination of the "Fund" code (01), "Year" (18) and "Resource" (0113) in Financial 2000. Contact your Budget Analyst for assistance with this.

FUNCTIONAL AREA

3. Enter a Functional Area number.

The Functional Area in SAP is the same as the "**Function**" in Financial 2000. Generally, you will use **1000** for Instructional or 2700 for School Administration.

- 4. Click the Save icon.
- B
- 5. **Write** the notification number down (very bottom left corner) on your original paperwork.

 This number will disappear when you navigate to another screen.

 Notification 90000063 saved
- 6. Let your site **administrator** know that the notification is ready for them to approve. Give them the notification number you wrote down from the previous step so they can login to SAP and open the notification in change mode (Transaction Code IW22).

Note: refer your site administrator to the <u>Electronic Approvals for Administrators manual</u> for instructions on how to approve and send the notification via SAP email to Maintenance and Operations for further processing.

Note: check the status of the notification once or twice a week to make sure it is moving through the SAP system. Refer to the steps in the next chapter for instructions on how to monitor PM Notifications within SAP.

CREATING A PM41 NOTIFICATION (EQUIPMENT TRANSFER)

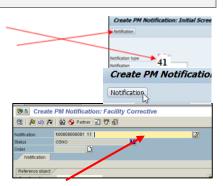
This lesson will show you how to create a notification to transfer equipment from one site to another. This kind of an equipment transfer is also a PM Notification - Special Order Type 41 because charges will be incurred. Equipment being picked up for salvage does not require a PM Notification.

Important: before you enter an Equipment Transfer notification into SAP, complete the **Equipment Transfer form (BU-133)** and make a note of its record number. This number will be entered into the PM Notification's description box. Send the completed Equipment Transfer form via pony mail to Inventory Control for processing.

1. From the SAP Easy Access menu, in the Command Field, enter IW21 and press Enter.

Note: If the Command Field is missing, click the expand arrow, top left corner of screen, to unhide it.

- 2. In the Notification type field, type 41.
- 3. Press Enter or click the Notification button.
- 4. In the **Notification Title** field, type **Equipment Transfer**.
- 5. Click in the **Functional loc.** Field, type 01-###, e.g., 01-795.
- 6. In the **Description field**, type Equipment Transfer No. #### (Replace the #'s with the actual number from the BU-133 form).



- 7. Also enter detailed description of **what is to be picked up** and from where and to where it is going.
- 8. In the **Reported by** field, type the name of the person requesting the transfer.
- 9. In the **Funds Center**, **Fund**, and **Functional Area** fields, enter the appropriate budget codes. See "Entering a Budget Number" on the previous page.
- 10. Click the Save icon.



Important: write the notification number down (shown on very bottom left corner) on your original paperwork. This number will disappear when you navigate to another screen.

11. Let your site **administrator** know that the notification is ready for them to approve. Give them the notification number you wrote down from the previous step so they can login to SAP and open the notification in change mode (Transaction Code IW22).

Note: refer your site administrator to the <u>Electronic Approvals for Administrators manual</u> for instructions.

Check the **status** of the notification once or twice a week to make sure it is moving through the SAP system. Refer to the steps in the lesson for instructions on how to **Check Status of PM Notifications**.

USING SAP EMAIL TO ROUTE A PM NOTIFICATION

You may be asked to route a PM Notification to Maintenance and Operations or Fiscal Services via SAP Email for processing. The instructions in this lesson will walk you through the steps for doing this and for checking your SAP Inbox for incoming email from these District departments.

OPEN PM NOTIFICATION

- 1. From the SAP Easy Access menu, in the Command Field enter IW22 and press Enter.
- 2. In the **Notification field**, enter the notification number.

If you just saved the notification, its number should already be present in this field. If you don't know the notification number, click the Find Entries icon and search for it.

3. When the notification number appears in the Notification field, press **Enter**. The Change PM Notification: Initial Screen appears.

SEND NOTIFICATION THROUGH SAP E-MAIL

1. Click the **down arrow** on the right side of the Services for Object icon.



2. Point to **Send** and choose **Send Object with Note**.

The Create Document and Send window displays.

Note: if the Create Document and Send window does not appear, click the minimize icon in the upper right corner of the SAP window to see if this window has opened behind the current window.

3. In the Document contents tab, type the **reason** you are sending the e-mail.

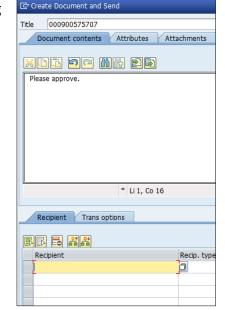
Example: Please approve or Equipment transfer.

- 4. Click in the first available **Recipient** field.
- 5. Click the icon to the right of Recipient field.
- 6. Type the **last name** in the Find field.

Note: This has to be a user that has permission to use SAP.

- 7. Click the **Continue** icon.
- \checkmark
- 8. If a list appears, click in the box to **select** the correct name, and then click on the Copy icon.
- 9. Click the **Express Mail** option to place a check mark in the box.





This will alert the recipient on the receiving end that new e-mail has arrived.

10. Click the **Send** icon to send the SAP email to the recipients listed.



11. Click the **Back** icon twice to return to the SAP Easy Access menu.



CHECK OUTGOING SAP E-MAIL

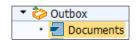
Use these steps if you want to check to see if your SAP E-Mail was sent.

From the SAP Easy Access menu, click on the SAP Business Workspace icon.



2. Click on the **Outbox** icon, and then click on the Document item.

The SAP Emails that you have recently sent will appear on the right. You should see the email you just sent. If not, repeat the steps.



3. Click the **Back** icon to return to the SAP Easy Access menu.



CHECK STATUS OF A PM NOTIFICATION

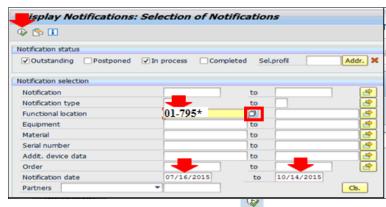
After your notification has been saved, you can reopen it to check when the notification has been turned into a work order or if it has been cancelled and to generate a list of notices you want. You can also add additional notes into the description box, but you cannot edit a notification once it has been saved.

CHECKING STATUS

- 1. From the SAP Easy Access menu, in the Command Field, enter IW23 and press Enter. The Notification # that you just created should be displayed in the field. If not, type it in.
- 2. Click in the **Notification field** and press **Enter**. Skip Steps 3 through 6 if you know the notification number.

SEARCH FOR PM NOTIFICATION NUMBER

- 3. If you don't know the number, click the Find Entries icon to the right of the field and complete steps 4, 5, and 6.
- 4. Enter **01** (a dash), your Functional Location number followed by an asterisk (01-###*).
- Enter a Beginning and Ending Notification date in the Notification date field and click the Execute icon.



11 Sprinkler broken on eastside of BOE

i

6. Double-click on the **desired notification** to place the notification number in the Notification field and press enter. Display PM Notification: Facility Corrective

Notification

Notific. Si

Order

🖳 l 🖀 📑 🕞 💯

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900521964

11465639

NOPR NOPT ORAS

- 7. Click the **Status Detail** icon to display the explanation of NOPR, NOPT, ORAS, TECO etc.
- 8. Click the **Display** icon to view Order details.
- 9. Click the **Back** icon to go back one step.



10. Click the **Exit** icon to close the PM Notification Display screen.

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lea 6a

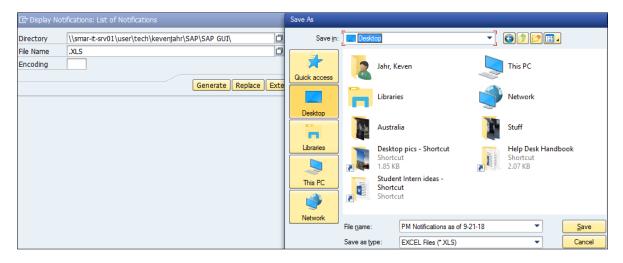
LISTING/PRINTING PM NOTIFICATIONS

LISTING

- 1. From the SAP Easy Access menu, in the Command Field, enter IW23 and press Enter.
- 2. Click the **Find Entries** icon to the right of the field. \Box
- 3. Select the Notification Status you wish the list to include. You can choose one or more.
- 4. Enter 01- (a dash), your **Functional Location** number followed by an asterisk (01-###*).
- 5. Enter a Beginning and Ending Notification date in the Notification date field.
- 6. Click the **Execute** icon.
- 7. If you get a **message** that you do not have permissions....click the **green check mark** icon. Your list appears. You can right-click on the column headings to sort them.

PRINT

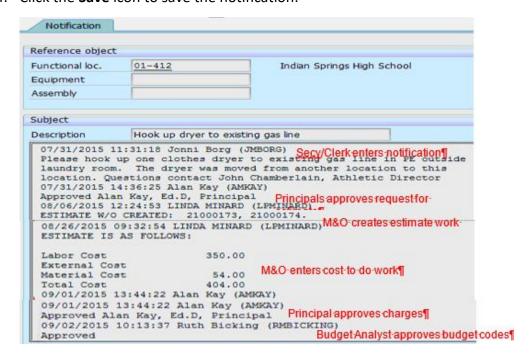
- 1. Go to **List** in the top menu bar.
- 2. Hover over the Save option.
- Click on File.....
- 4. Select the Spreadsheet radio button.
- 5. Click the green check mark icon.
- 6. Click the **Directory** selection icon
- 7. Select your **Save in:** destination from the drop down arrow.
- 8. Type a **file name:** in the blank field at the bottom of the screen.
- 9. Leave **Save as type:** as default.
- 10. Click the Save button.
- 11. Click the Generate button.
- 12. Click on **Allow** to the message that appears.
- 13. Open the file from where you saved it.
- 14. If another message appears about file format, corruption or safe.....select YES.
- 15. Edit the file as you wish and then print.



CHANGING OR CANCELING A PM NOTIFICATION

You can change a Notification until you send it. After it has been sent, you cannot change what has already been done, you can only add to it. Once it becomes a Work Order, you would have to contact Maintenance and Operations for any changes.

- 1. From the SAP Easy Access menu, in the Command Field, enter IW22 and press Enter.
 - The Notification # that you just created should be displayed in the field. If not, type it in.
- 2. Click in the **Notification field** and press **Enter**.
- 3. Click in the **Description** box and enter additional text below the existing text.
- 4. Click the Save icon to save the notification.



CANCELLING A PM NOTIFICATION

Look up the notification number.

You will be asked for this number when you request a cancellation.

2. Contact the Maintenance and Operations department at (909) 381-6100 and state that you need to cancel a notification.

Note: Once the notification has been cancelled, you will see NOCO within the Notification Status field.