



Australian Government
Department of Defence

Create Responsive Work Order - Minor Workplace Adjustment



Standard Operating Procedure



DOCUMENT ADMINISTRATION

Document Properties

Author	Mark Peacock
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Revision History

Revision Date	Author	Version No.	Description
15 th June 2016	A. Weeks	0.1	Initial version
23 rd June 2016	Peter Howard	0.2	Initial review and feedback
28 th June 2016	A.Weeks	0.3	Update as per feedback
30 th May 2018	Mark Peacock	1	Final Version for publication

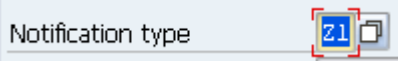

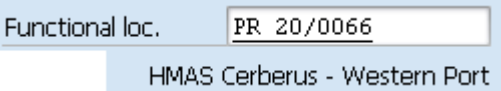
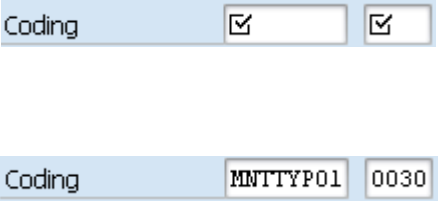

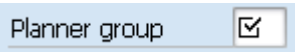
Related Project Documents

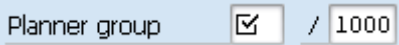


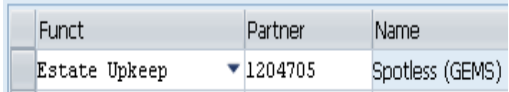
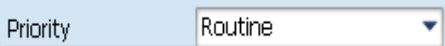


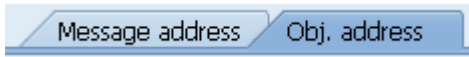
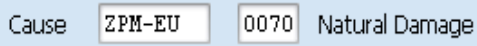

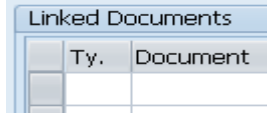
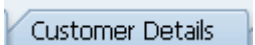
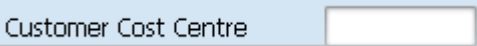
Objective or SOLMAN Reference	Title	Version	Date of Issue
R8499139	GEMS Glossary	NA	NA
AD-27-03-01	Create Notification	0.1	18 Sept 2013
AD-27-03-13	Create Work Order	0.1	15 Oct 2013

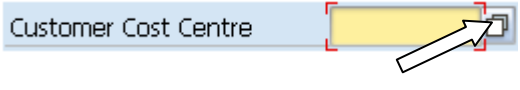
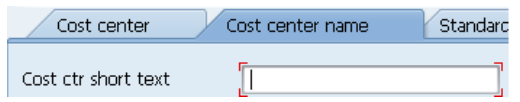


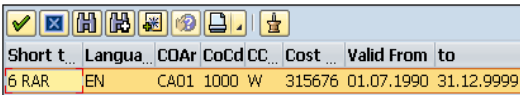

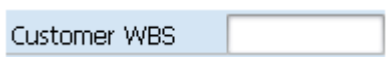

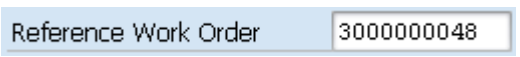


Part 1 of 2: Create the Notification

Minor Workplace Adjustment – Low value new work (not maintenance) up to the value of \$5,000 (excluding GST) including but not limited to:

- moving items (e.g. partitions, workstations, power points, whiteboards),
- installing additional items (e.g. power points, mounting picture rails and whiteboards) and
- replacing locks with those with a specified function.

1	Create the notification by executing transaction IW21.	
2	Select notification type Z1.	
3	Press enter to continue to the next screen.	
4	Enter a description for the service request of up to 40 characters. This description should follow the conventions outlined in the relevant business rule . A longer explanation of the service request will be required in the long text section (refer step seven).	
5	<p>Enter a functional location or equipment number. If the service request relates to a Navy ship, enter the functional location of the wharf at which the ship is docked.</p> <p>Please DO NOT select an infrastructure system or equipment system!!!</p> <p>For assistance with searching for a functional location please click here.</p>	
6	<p>Note: if a coding value has already been populated by the system, please DO NOT change the existing coding values.</p> <p>Enter the coding and code value to categorise the notification appropriately. The values displayed in the coding list will vary depending on the type of notification selected in step 2 above. Minor workplace adjustment service requests should have a code value of 0030 (as shown).</p>	
7	Enter the long description (detailed explanation of the service request). Note: this long description needs to be as detailed as possible so that the contractor is well informed about the requirements. Please refer to step 19 if additional documentation needs to be included with the work order.	<p>Do not use this field</p>  <p>Enter long description in here</p>
8	Enter the planner group (trade type required for fixing the problem). If no appropriate trade type is available in the drop down list then select OTH.	





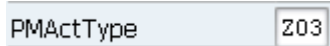

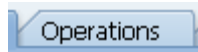
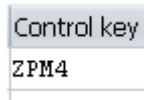

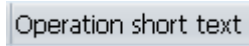

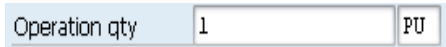
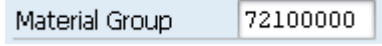
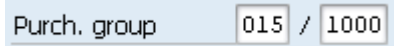
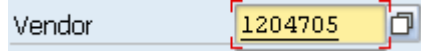
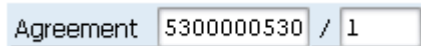
9	Enter the planner group plant (fixed value of 1000).	
10	Enter main work centre (a combination of region and service tower) eg: QLD-EM = Queensland – EMOS. The system will combine this with the planner group to determine which contractor will receive the work order.	
11	Enter the PMKeys number of the person submitting the service request. This number can be searched for if required. If the requestor does not have a PMKeys number, just enter their first initial and last-name. (limit of 12 characters).	
12	Press enter to validate the data and auto-populate relevant fields.	
13	Check the partner functions table (you may need to scroll down) to verify that the correct vendor has been selected. Note that the vendor number is clearly displayed. This will be required in step 19 of part 2 when creating the work order.	
14	On the additional data tab, set the priority for the request and press enter. Based on priority, the required start and end dates will be auto populated. Override these dates if required. (cannot be backdated!)	
15	The message address tab is used to configure on-site contact information. Click  to edit these details if required.	
16	The object address tab contains the physical address of the functional location previously chosen during step six. Select the tab to verify that all address details are correct. If the details listed do not appear to be correct, you may need to return to step six and select a different functional location.	
17	Select a cause code (from the list available) that best supports the service request.	
18	Include a short description of the cause (40 characters or less).	
19	Attach any linked documents (you may need to scroll down).	
20	On customer details tab, enter following details: - <ul style="list-style-type: none"> • Requestor name • Requestor phone or mobile number • Requestor email (for work order status updates) 	
21	If the service request is customer funded (not E&IG), populate the Customer Cost Centre field as follows:	

21a	Click on the match code button just to the right hand side of the Customer Cost Centre field.	
21b	Ensure that the Cost centre name tab has been selected.	
21c	Enter search criteria to assist with locating the correct cost centre. For example; if the 6RAR cost centre is required, enter “6*RAR*” in the Cost ctr short text field.	
21d	Click the continue button to proceed with work order creation.	
21e	Select the required cost centre from the list displayed.	
21f	The Customer Cost Centre field will be updated with the selected value. PLEASE VERIFY THIS VALUE WITH THE CUSTOMER!!!	
OR		
22	If the service request is customer funded (not E&IG), AND relates directly to a project, enter the Customer WBS code.	
23	If this service request relates to a previous service request, enter the notification number of the previous service request.	
OR		
24	If this service request is being raised in reference to an Estate Appraisal (EA) work order, enter the EA work order number in the Reference Work Order field.	
25	Click the Save button to save the notification and produce a notification number.	
OR		
26	Click on the create work order button.	

Part 2 of 2: Create Work Order

Please note, if you are creating a work order for a previously saved notification, please open the saved notification before proceeding. (Refer to “Review & Validate Pending Notifications” S.O.P. on how to do this.)

1	If the notification was saved in part 1 – step 25, use transaction IW22 to open the notification. Otherwise, proceed to step 4.	Use transaction IW22
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2	Enter the notification number in the notification field.	
3	Click the continue button.	
4	If the last action was to complete step 26 in part 1, the order type should be automatically populated. Please do not change this value.	
5	Click the continue button.	
6	Enter the maintenance activity type of Z03 Minor Workplace Adjustment. (categorisation for responsive maintenance work).	
7	If the work order is related to an event, select the relevant event from the list displayed in the revision field. (eg: Talisman/Sabre, Insurance events etc)	
8	Open the operations tab.	
9	Check the control key for the first operation automatically created. It should be ZPM4 for non-costed operation (i.e. works covered under fixed fee and no separate fee is payable to get this work order executed). This value will be updated by the contractor as required.	
10	Highlight the first operation by clicking the line selector.	
11	Enter a description for the first operation in the short text field. This could be as simple as “Fix reported problem.” (The nature of the problem was reported in step 7 – part 1 when the notification was created.)	
12	Click the External button at the bottom of the screen.	
13	Ensure that an operational quantity of 1 performance unit has been selected.	
14	Identify the service tower by entering a material group. (i.e. the material group for estate upkeep is 72100000)	
15	Enter purchasing group values of 015 / 1000.	
16	Enter the Vendor number. Refer step 13 in part 1 or QRG – How to find a vendor number.	
17	Enter the agreement (contract) number and line item. Refer QRG – How to Find Agreement #	
OR		

17	Enter the purchase order number and associated line. Refer QRG – How to Find Purchase Order #	
18	Open the services tab.	
19	Click in the service number field.	
20	Click the Service Selection button at the bottom of the screen.	
20	Verify that the correct purchasing document is listed (as entered in step 22)	
21	Click the continue button.	
22	Select the relevant service from the list by clicking on the line selector.	
23	With the service selected, click the adopt services button.	
Repeat steps 10 to 23 for each service required.		
24	Click the continue button.	
25	Save the work order. The system will check for errors (which must be resolved before saving).	
26	Both the order and notification numbers will be displayed at the bottom of the screen.	
To release the saved work order:		
27	Execute transaction IW22.	
28	Enter the notification number in the notification field (if it is not already displayed).	
29	Press enter to open the notification/work order.	
30	Click the change work order button.	
31	Release the work order by clicking on the small green flag located in the top left area of the screen. The work order will be sent to the contractor via CIX.	