

## How to make a service requisition for a contractor

Make a work order

Go to the operations tab, enter in "PLTCONTR" for the Work ctr and "PM03" for the Control Key.

**Create Breakdown Maintenance : Operation Overview**

Order: PM03 000000000001 REPLACE ALL 4 TIRES

Sys.Status: CRTD MANC OPEN

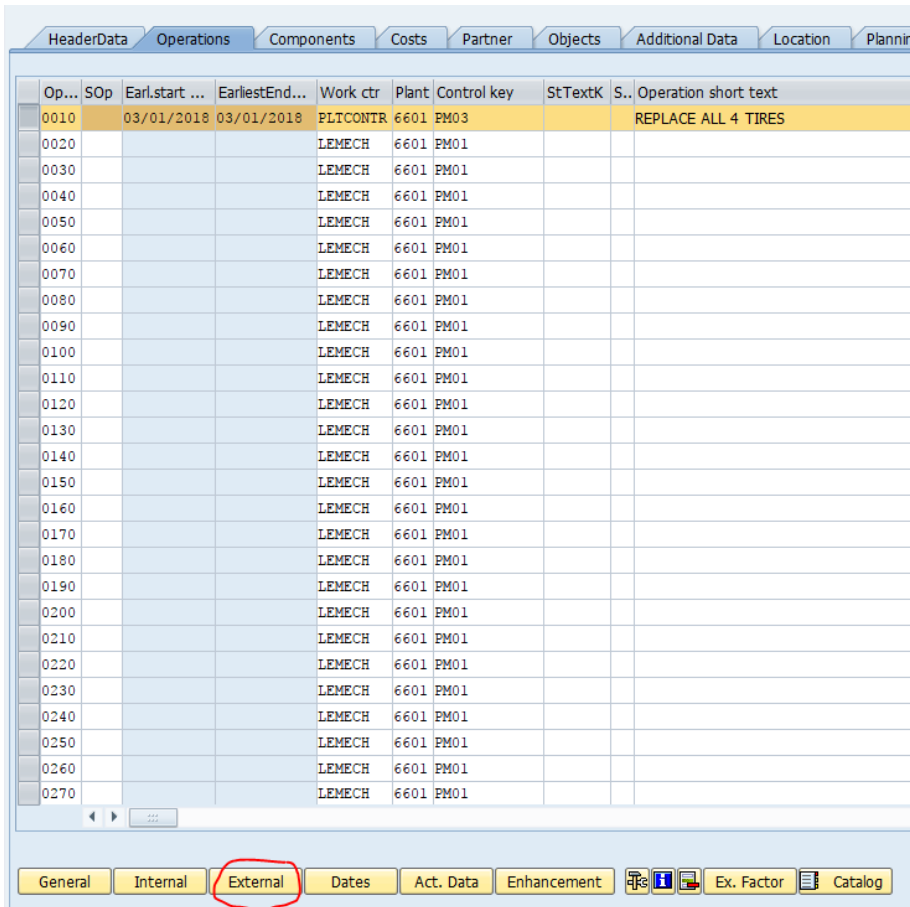
HeaderData | **Operations** | Components | Costs | Partner | Objects | Additional Data | Location | Planni

Op...	SOp	Earl.start ...	EarliestEnd...	Work ctr	Plant	Control key	StTextK	S..	Operation short text
0010		03/01/2018	03/01/2018	PLTCONTR	6601	PM03			REPLACE ALL 4 TIRES
0020				LEMECH	6601	PM01			

Hit enter. This box will pop up. Fill it out.

Operation qty	1.000	SRV	Sort Term	
Price	0.00	USD	per	1
Material Group	016		Cost Element	
Purch. group	664 / RT36		Vendor	10163337
Agreement		/	Info Record	
Recipient	MHEMPHILL		Unloading Point	TRUCK SHOP
Requisitioner	MHEMPHILL		Tracking Number	
Pl. Deliv. Time			FW Order	/

Highlight the operation and click "External".

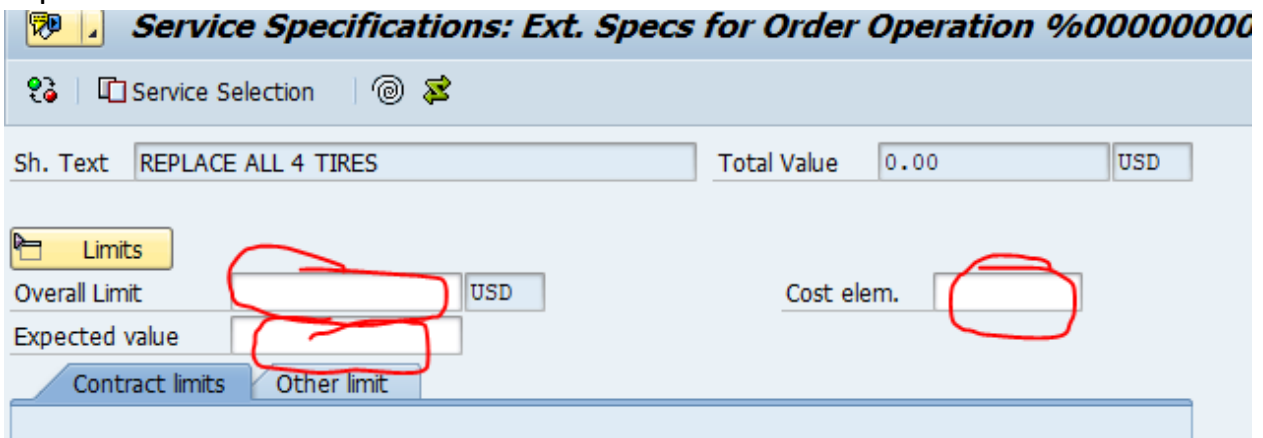


The screenshot shows the SAP Operations table with the following columns: Op..., SOp, Ear.start ..., EarliestEnd..., Work ctr, Plant, Control key, StTextK, S., and Operation short text. The row for operation 0010 is highlighted in yellow and contains the text 'REPLACE ALL 4 TIRES'. Below the table, the 'External' button in the bottom toolbar is circled in red.

Op...	SOp	Ear.start ...	EarliestEnd...	Work ctr	Plant	Control key	StTextK	S.	Operation short text
0010		03/01/2018	03/01/2018	PLICONTR	6601	PM03			REPLACE ALL 4 TIRES
0020				LEMECH	6601	PM01			
0030				LEMECH	6601	PM01			
0040				LEMECH	6601	PM01			
0050				LEMECH	6601	PM01			
0060				LEMECH	6601	PM01			
0070				LEMECH	6601	PM01			
0080				LEMECH	6601	PM01			
0090				LEMECH	6601	PM01			
0100				LEMECH	6601	PM01			
0110				LEMECH	6601	PM01			
0120				LEMECH	6601	PM01			
0130				LEMECH	6601	PM01			
0140				LEMECH	6601	PM01			
0150				LEMECH	6601	PM01			
0160				LEMECH	6601	PM01			
0170				LEMECH	6601	PM01			
0180				LEMECH	6601	PM01			
0190				LEMECH	6601	PM01			
0200				LEMECH	6601	PM01			
0210				LEMECH	6601	PM01			
0220				LEMECH	6601	PM01			
0230				LEMECH	6601	PM01			
0240				LEMECH	6601	PM01			
0250				LEMECH	6601	PM01			
0260				LEMECH	6601	PM01			
0270				LEMECH	6601	PM01			

Click on the limits button towards the bottom of the screen 

Enter in the total amount including tax on the quote in both the Overall Limit and Expected value fields. Enter in the GL Account number.



The screenshot shows the 'Service Specifications: Ext. Specs for Order Operation %00000000' dialog. The 'Limits' section is highlighted in yellow. The 'Overall Limit' and 'Expected value' fields are circled in red. The 'Cost elem.' field is also circled in red. The 'Total Value' field shows 0.00 USD.

Sh. Text: REPLACE ALL 4 TIRES | Total Value: 0.00 | USD

Limits

Overall Limit:  USD | Cost elem.:

Expected value:

Contract limits | Other limit

Click back . Make sure the work order is released . Click save .

This box will pop up. Fill out all the boxes. And click “Attach to External Operation”.

SCOPE OF WORK TEMPLATE

Operation	0010
Scope of work template Number	1000160 <input checked="" type="checkbox"/>
Scope of work title	BLANK TEMPLATE

01 DESCRIBE THE WORK TO BE PERFORMED

02 DESCRIBE WHERE THE WORK WILL BE PERFORMED

03 DESCRIBE WHEN THE WORK WILL BE PERFORMED

04 DESCRIBE WITH WHAT SPECIFICATION THE WORK WILL BE BUILT

05 DESCRIBE WHO SUPPLIES THE MATERIAL

06 DESCRIBE HOW THE WORK WILL BE MEASURED

07 DESCRIBE AT WHAT POINT WILL THE WORK BE ACCEPTED

Attach to External Operation

This box will pop up.

JOB SAFETY CHECKLIST

Operation 0010  
Location  Service Property Type   
Description  Description

Job Safety Checklist

QUESTION	REQUIRED
<b>General</b>	
Will the contractor be required to prepare and submit a formal Health, Safety and Environmental Action Plan bef...	<input type="checkbox"/>
Will contractor employees be required to participate in worksite drug and alcohol testing?	<input type="checkbox"/>
Will this job require a full-time contractor Health, Safety and Environmental representative?	<input type="checkbox"/>
Will a formal pre-job meeting be required for this job?	<input type="checkbox"/>
Will services be performed on-site?	<input type="checkbox"/>
<b>Safety</b>	
Will the contractor be required to conduct daily pre-shift safety meetings?	<input type="checkbox"/>
Will the contractor be required to conduct documented daily work site inspections?	<input type="checkbox"/>
Will any portion of this job require use of fall prevention or fall protection?	<input type="checkbox"/>
Will additional or temporary lighting be required for this job?	<input type="checkbox"/>
Will compressed gasses be used or will welding be conducted as part of this job?	<input type="checkbox"/>
Will the contractor be required to develop a formal evacuation or emergency plan?	<input type="checkbox"/>
Will the contractor be required to provide first-aid supplies at the work site?	<input type="checkbox"/>
<b>Health</b>	
Will medical surveillance or health monitoring be required for contractor employees?	<input type="checkbox"/>

Comments

For location, click on the search box

JOB SAFETY CHECKLIST

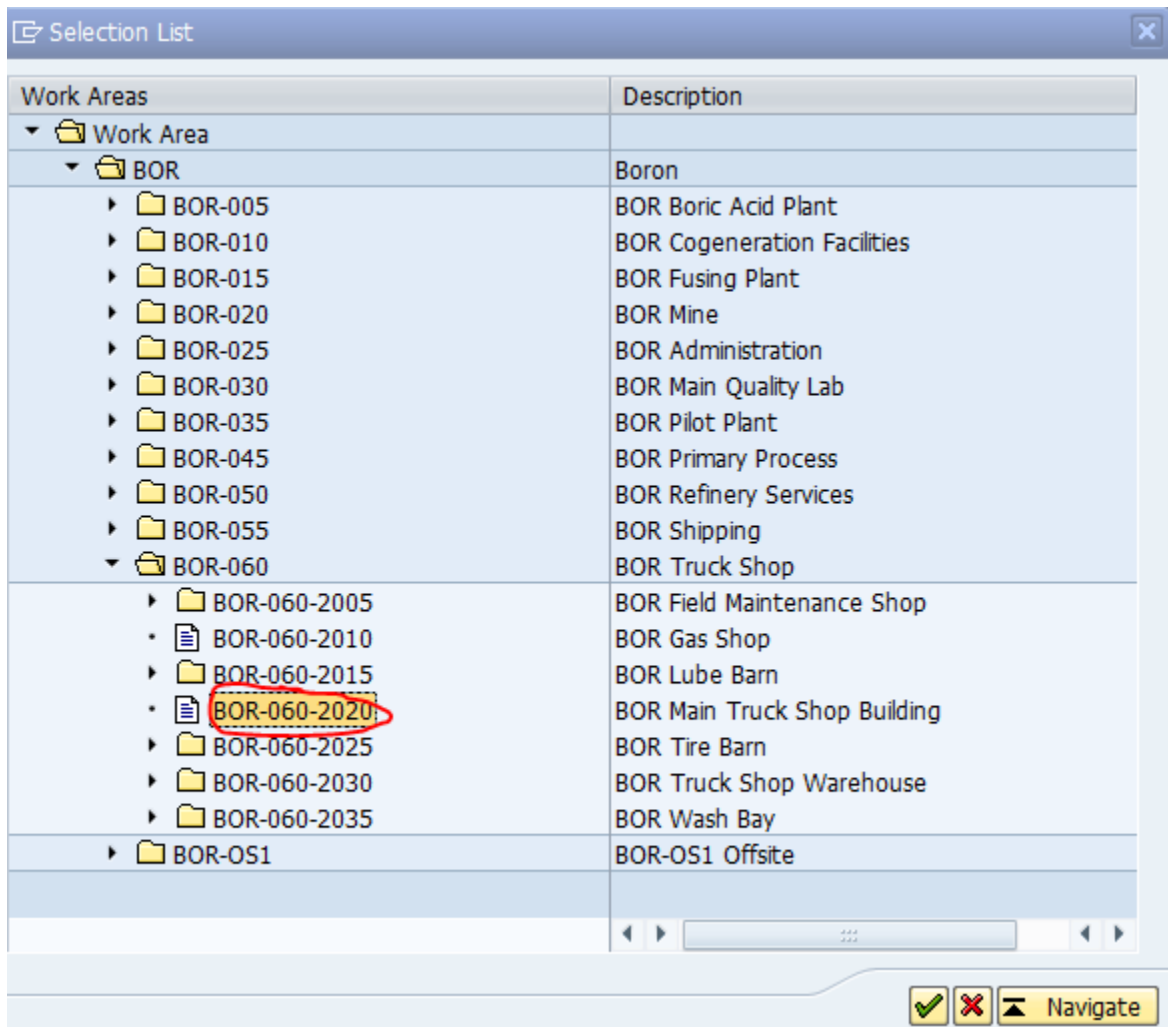
Operation 0010  
Location

Then click on "Structure Search"

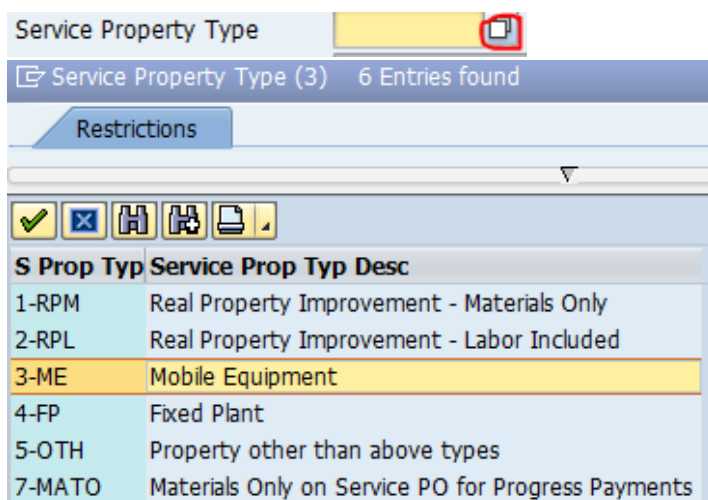
JOB SAFETY CHECKLIST

Work area   
Description   
Type   
Plant 6601  
Show Inactive?   
Show Historical?

Find the location and double click on it.



Fill in "Service Property Type". Click on the search box for a list to select from. Double click on it.




Fill out the check list.

QUESTION	REQUIRED
<b>General</b>	
Will the contractor be required to prepare and submit a formal Health, Safety and Environmental Action Plan bef...	<input type="checkbox"/>
Will contractor employees be required to participate in worksite drug and alcohol testing?	<input type="checkbox"/>
Will this job require a full-time contractor Health, Safety and Environmental representative?	<input type="checkbox"/>
Will a formal pre-job meeting be required for this job?	<input type="checkbox"/>
Will services be performed on-site?	<input type="checkbox"/>
<b>Safety</b>	
Will the contractor be required to conduct daily pre-shift safety meetings?	<input type="checkbox"/>
Will the contractor be required to conduct documented daily work site inspections?	<input type="checkbox"/>
Will any portion of this job require use of fall prevention or fall protection?	<input type="checkbox"/>
Will additional or temporary lighting be required for this job?	<input type="checkbox"/>
Will compressed gasses be used or will welding be conducted as part of this job?	<input type="checkbox"/>
Will the contractor be required to develop a formal evacuation or emergency plan?	<input type="checkbox"/>
Will the contractor be required to provide first-aid supplies at the work site?	<input type="checkbox"/>
<b>Health</b>	
Will medical surveillance or health monitoring be required for contractor employees?	<input type="checkbox"/>

Under the Comments section, put in who the designated manager is.

Comments

Click the check 

This box now pops up. Guess what? You get to fill in that one too!

Service Procurement custom fields for 0010

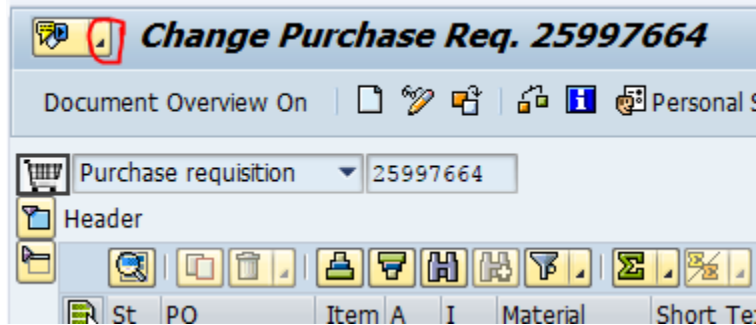
Engagement type	<input type="text"/>
Equipment	<input type="text"/>
Materials Allowed	<input type="text"/>
Material Value	<input type="text"/>
Subcontracting	<input type="text"/>
Off Site Work	<input type="text"/>
OverTime	<input type="text"/>

Click Continue. Save the work order .

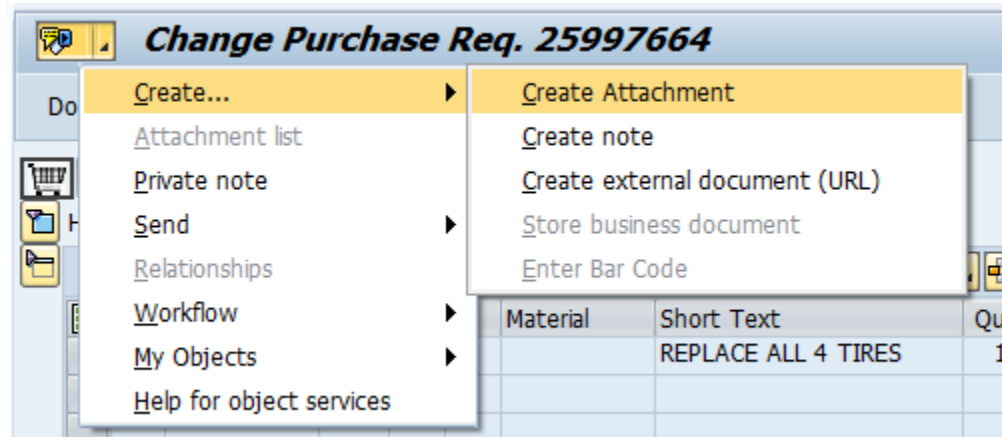
You are **not** done yet! You need to get the requisition number. Open the requisition and attach the quote and SHEAP.

You can find the req number by going back into the work order, operations tab, click on account data.

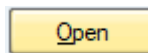
Open the requisition and click on this down arrow.



Select Create, then Create Attachment



Find the quote on your computer and click on Open



Repeat for the SHEAP.

Now contact the procurement officer and ask for a PO!