Introduction:

This Job Aid will guide SD.03 Services Delivery Planners when they need to create a Sub-Service Order that will be linked to a Superior Service Order:

- Understanding what Sub-Service Orders are
- When to use Sub-Service Orders
- Step-by-Step creation and processing of Sub-Service Orders
- Review and reporting of the order hierarchy

Trigger

Use this functionality when you need to create single or multiple Sub-Service Orders, normally in a scenario where you have multiple recipients of a single service or multiple clients for a group of services provided under one umbrella event.

Roles

Roles involved:

SD.03 Services Delivery Planner for Sub-Service Order Creation
SD.04 Services Delivery Releaser for Sub-Service Order Release

Prerequisites

In order to create a Sub-Service Order, a Superior Service Order to which the Sub-Service Order will be linked must exist.

Transaction Codes

IW36: creation
IW32: update
IW41: confirmation of activities

A. What is a Sub-Service Order?

A Sub-Service Order has a similar structure to a regular service order, with similar functionality, fields and processing.

The only difference is that a Sub-Service Order is linked to a main/superior Service Order, which reflects the cost of all the Sub-Service Orders linked to it.

B. When to use Sub-Service Orders?

There are three possible uses for a Sub-Service Order:

i. When we want to charge several clients for a single service, i.e. the cost would be divided among them.
ii. When we have a situation where more than one client is going to pay for different services under the same event.
iii. When an event has different services providers and each service provider manages their own portion of the overall service offering in a Sub-Service Order.

An example could be the organization of a large conference that includes activities related to the travel of the participants, interpretation, catering and publications.

In this case, it is possible to have multiple Sub-Service Orders linked to a main/superior Service Order that would enable each planner to more easily track activities divided by group, rather than having to control multiple activities in a single Service Order.

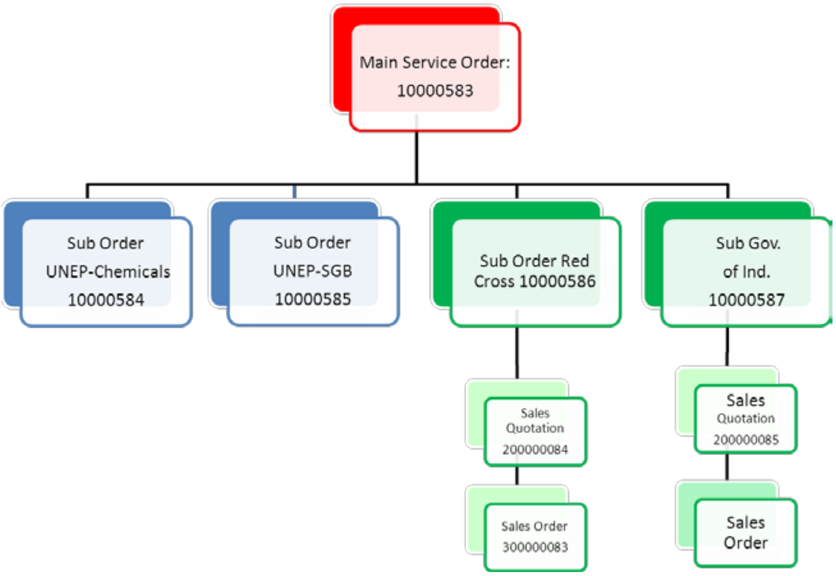
In the process of charging clients the Sub-Service Order functionality can be used to simplify the assignment of costs to different clients. Clients can be either internal or external, we would use different types of Service Orders for each and for the external clients a subsequent Sales Order has to be created, this process is explained separately in the Sales and Distribution User Guide.

Depending on the needs of the business an alternate solution could be to use several separate service orders, this decision lies with the business and would depend on the requirements to plan, track and report.

C. Step by step Sub-Service Order process:

In order to create a Sub-Service Order, a main/superior Service Order must exist. The main order will have the coding block of the main service provider and will not have the activities of the Sub-Service Orders but will reflect the costs of the Sub-Service Orders.

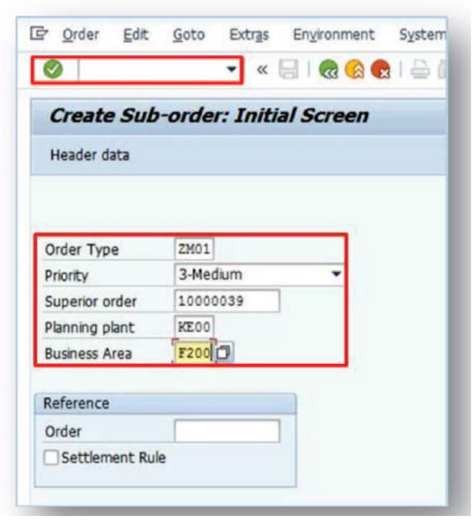
An example of a main/superior Service Order combined with a Sub-Service Order structure is shown in the following diagram, where one Service Order has four Sub-Service Orders linked to it. Each of the Sub-Service Orders are charged to different clients, two internal and two external:



A main/superior Service Order would be created as a shell, it would not contain any operations or components. Follow the normal steps for creating a Service Order, except adding operations and components and use your own coding block, not that of a client.

For each Sub-Service Order - Enter IW36 in the Command field

1. Create Sub-order Initial Screen will be displayed. Populate the following fields:
    i. Order type
    ii. Priority
    iii. Superior Order – the Main Order created in the previous step that must be in either HELD or APPR user status (it can be Released) before a sub-order can be created.
    iv. Planning Plant
    v. Business Area

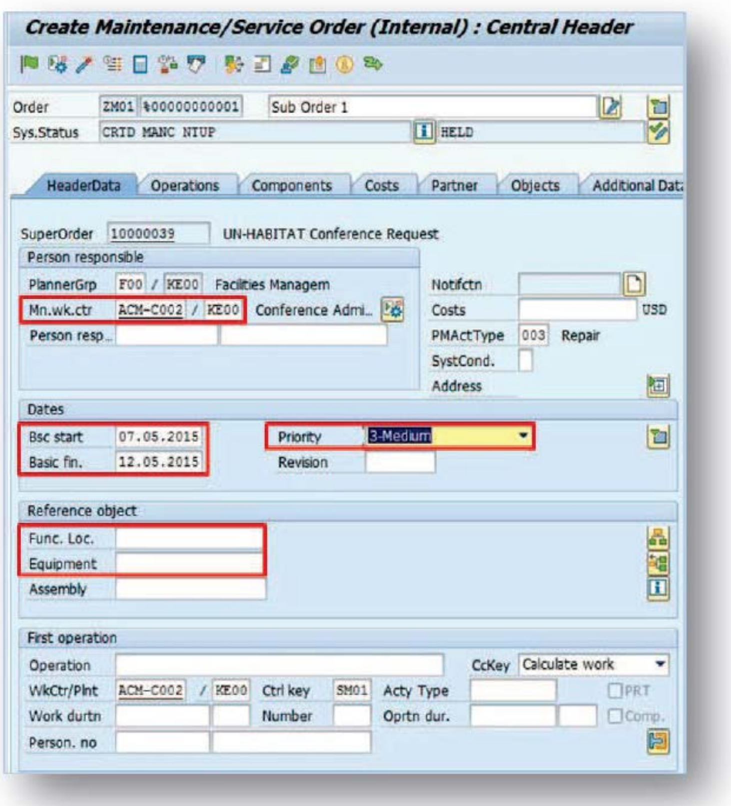


Click the Enter icon

2. The Central Header screen displays. Some required data will be populated from the Superior Order, however under the Header Data tab verify/update the following information:

i. Mn.wk.ctr: Main Work Centre that is responsible for the service provision, and the Work Centre Plant
ii. Bsc start and Basic fin.: These are automatically populated but can be changed for more aligned planning purposes.
iii. Func. Loc. and Equipment: If this service order is for a specific Functional Location and/or Equipment it can be specified here, or if this service order is related to a notification, the same values will be populated here.
iv. Enter a short description of the overall service in the Order Header.
v. Click the enter icon. If the message 'FM account assignment missing' displays, click the ok icon to exit.

Note: After entering the Equipment number, a pop-up window might display with a list of Service Orders related to that equipment. Click the OK icon to exit

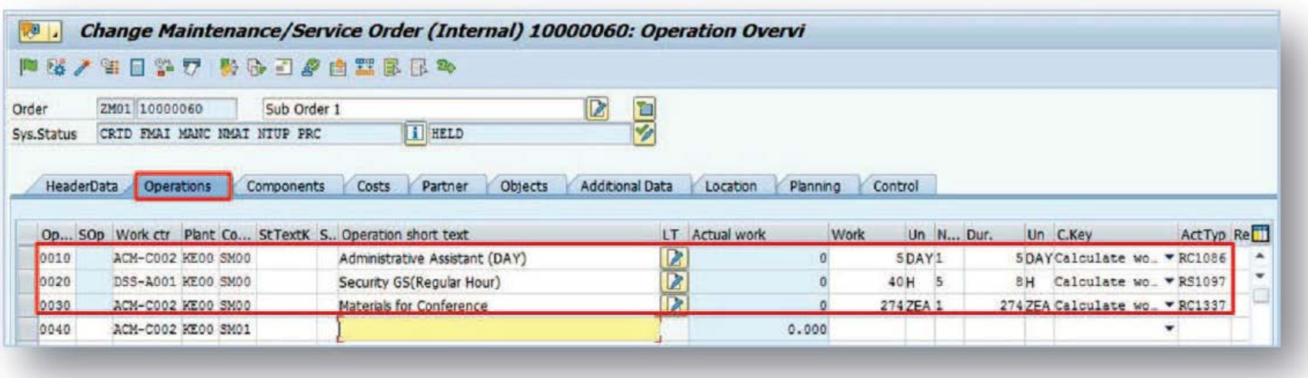


3. Click the Operation tab

Populate the following fields:

i. Work ctr and Plant (populated automatically from Header Tab – only change if necessary): Work Center and Plant where the service provision is planned and costs are captured.
ii. Control Key: The control key specifies if the operation will be performed by internal or external resources, defaults to SM00 for internal.
iii. ActTyp: Select the operation activity type by clicking on the match code.
iv. Operation short text: Enter a short description of the operation, normally activity description.
v. Un (Unit of Measure): Enter the correct Unit of Measure (Activity Unit) for the Activity, in each of the two 'Un' columns. To ensure you have the correct UoM double click on the Activity Type.
vi. Dur. and Number: Enter the duration and number of the operation, when you hit enter the Work will be calculated.

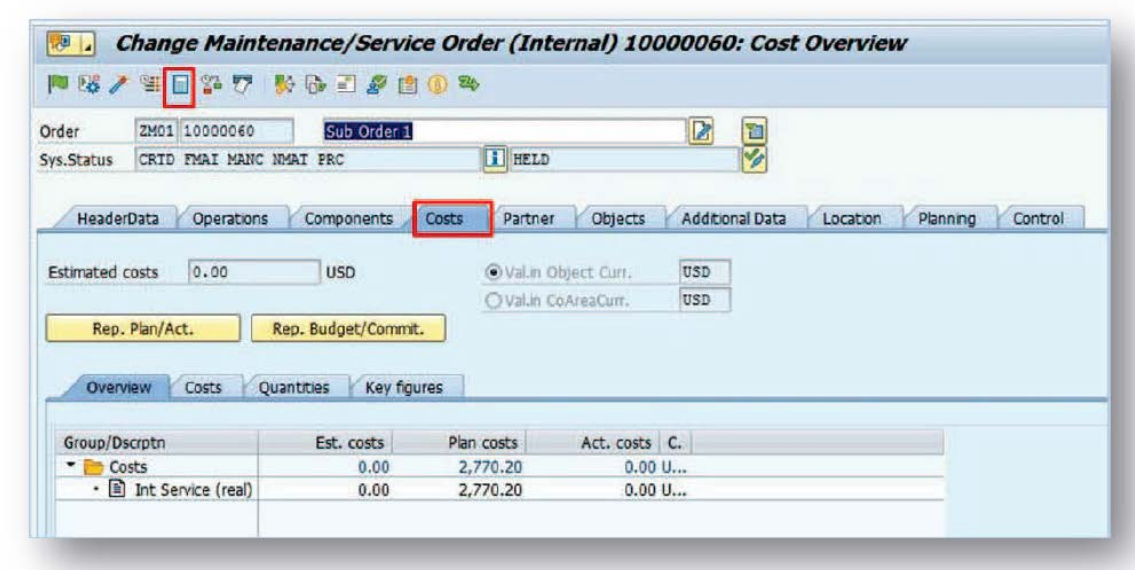
4. Repeat the above steps for all the activities



5. Components: If components are required refer to and follow the instructions in the User Guide on Service Order Management, Module 3 paragraphs 6 to 10 inclusive.

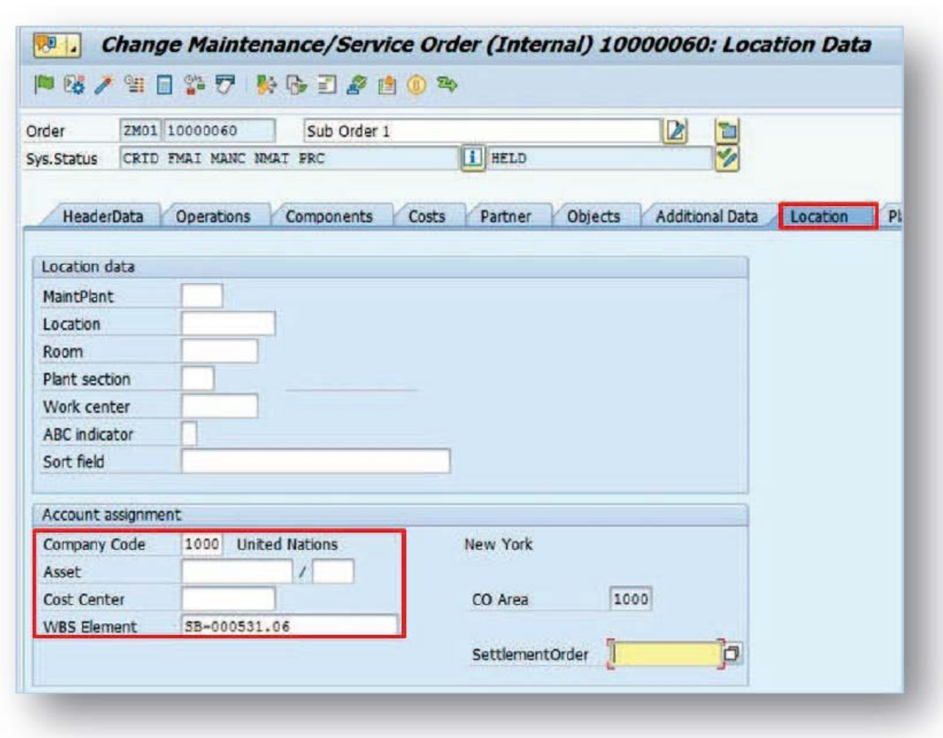
6. Click the Costs tab to review the planned (expected) cost of the service provision.

7. To calculate the total planned cost of the Service Order, click the Determine Cost button.



8. Click the Location tab and enter/verify the following account assignment details:
   i. Company Code
   ii. Asset (if relevant)
   iii. Cost Center/WBS Element/Internal Order

Note: If the Equipment/Functional Location has been specified, the same value will be populated here.



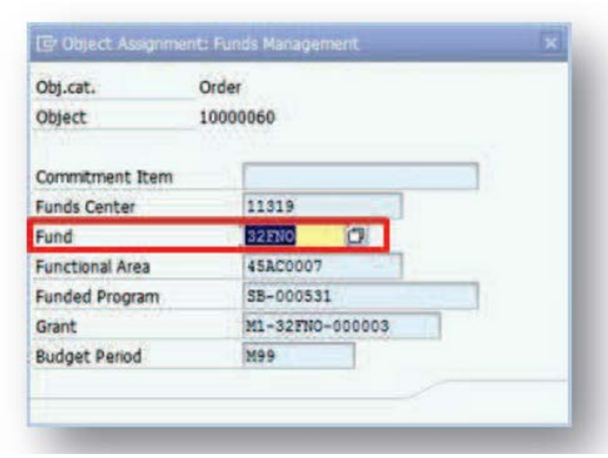
9. To enter the Fund of the Service Recipient, click the Goto menu.   Select Assignments > Funds Management menu item.

i. The Funds Management pop-up screen displays.

ii. Validate/enter the values in the Fund field.

iii. To change the account, click the Fund matchcode icon, or enter manually.

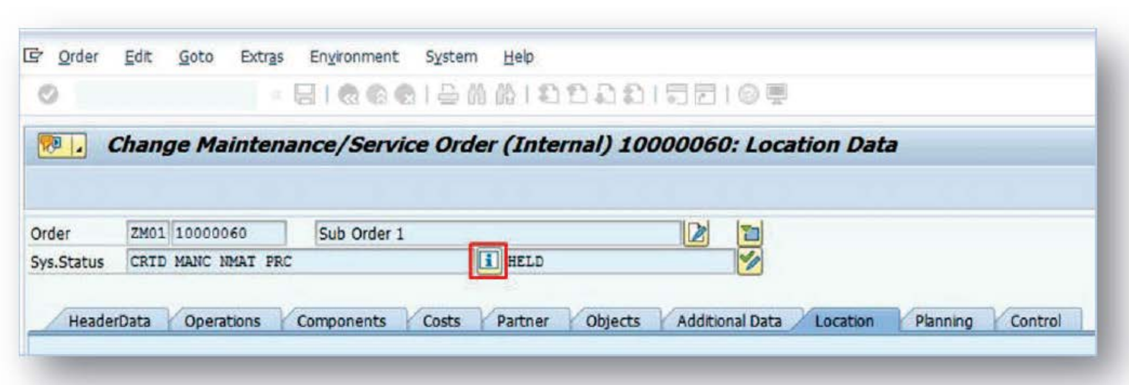
iv. Click the Enter icon to exit.



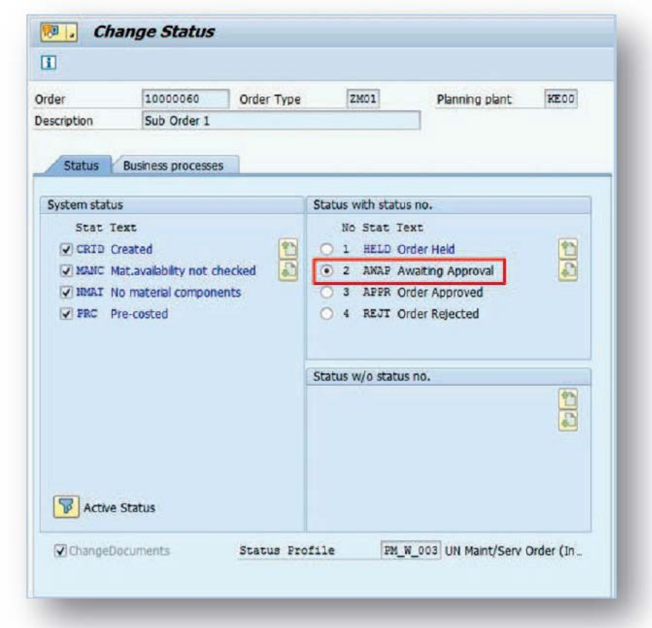
10. At this stage save the Sub-Service Order by clinking on the save icon. The Sub-Service Order has been created. Note down the Order number that will be in the bottom left-hand corner of your screen.

11. To go back into the Service Order use IW32 in the command field and then enter the order number you noted down in the previous step.

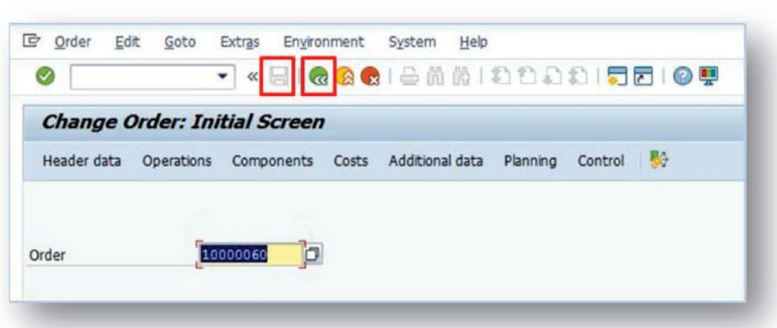
12. When you have the order open, review all of the data you have already input. Once you are satisfied all is okay, click the Status icon to change the Status of the Order.



13. On the Change Status screen, in the Status Tab, select the 2 AWAP radio button.



14. Click the Back (Green Arrows) icon and then click the Save icon again.



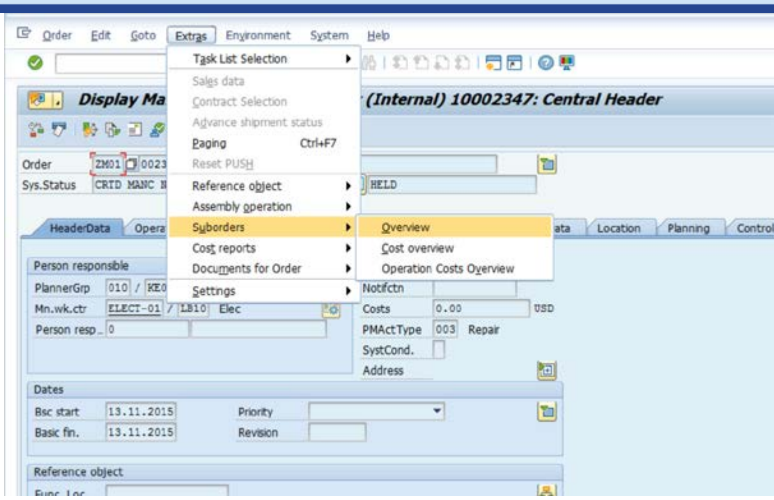
15. Approval, release, confirmation and completion steps of Sub-Service Orders are similar to regular Services Orders, using the t-codes IW32 and IW41.

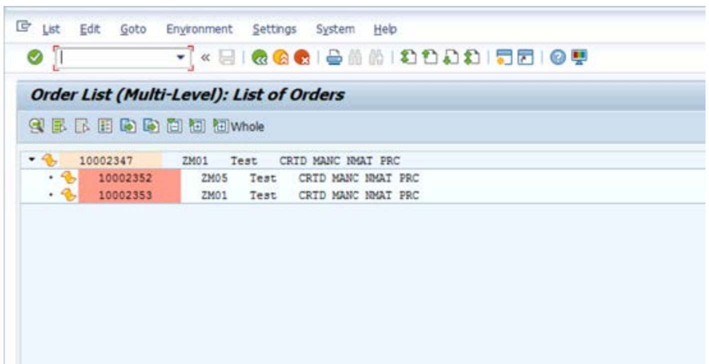
16. It is important to note that a main/superior Service Order cannot be Technically Completed until all the Sub-Service Orders linked to it are Technically Complete (TECO).

D. Reporting on Sub-Service Orders

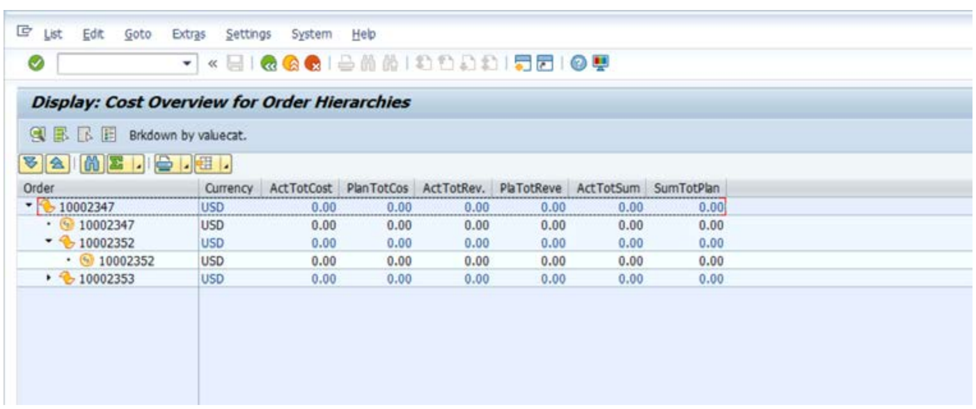
If you want to see the Sub-Service Orders that are linked to a main/superior Service Order:

1. Call up the header data screen of the order, for which you want to display the sub-orders. Choose: Extras > Sub-orders > Overview





2. If you select “cost overview”, you can see the detailed costs of each sub order:

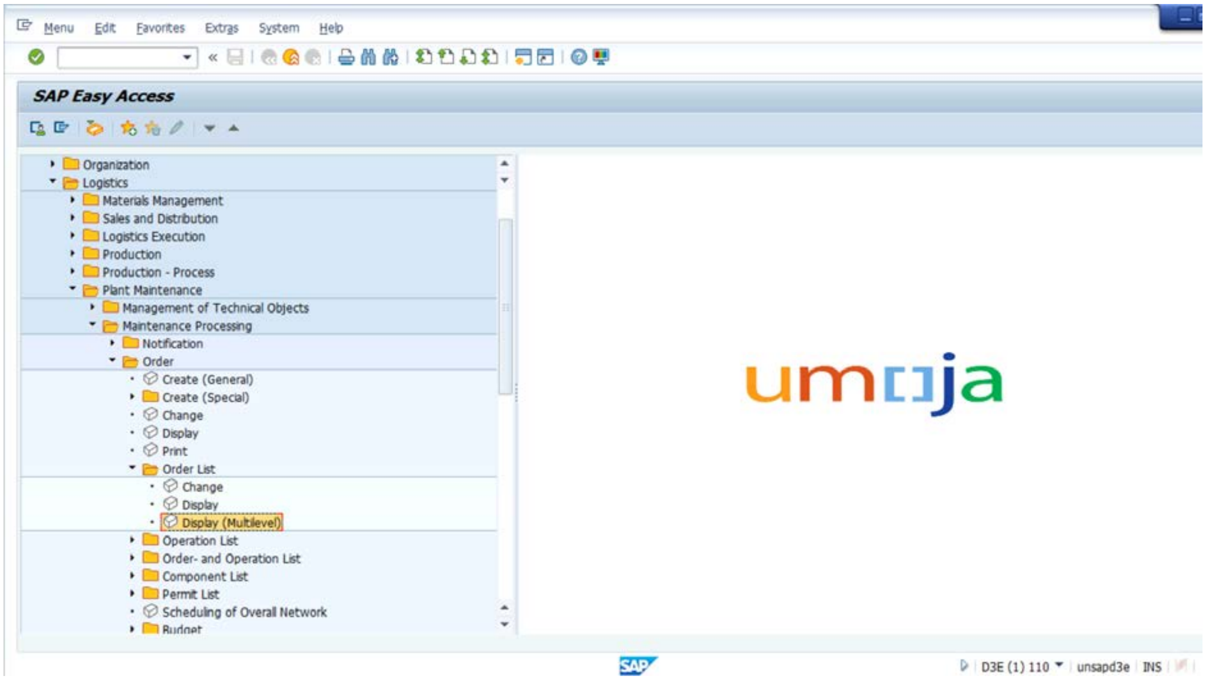


3. Displaying Sub-Orders in the Multi-Level Order List:

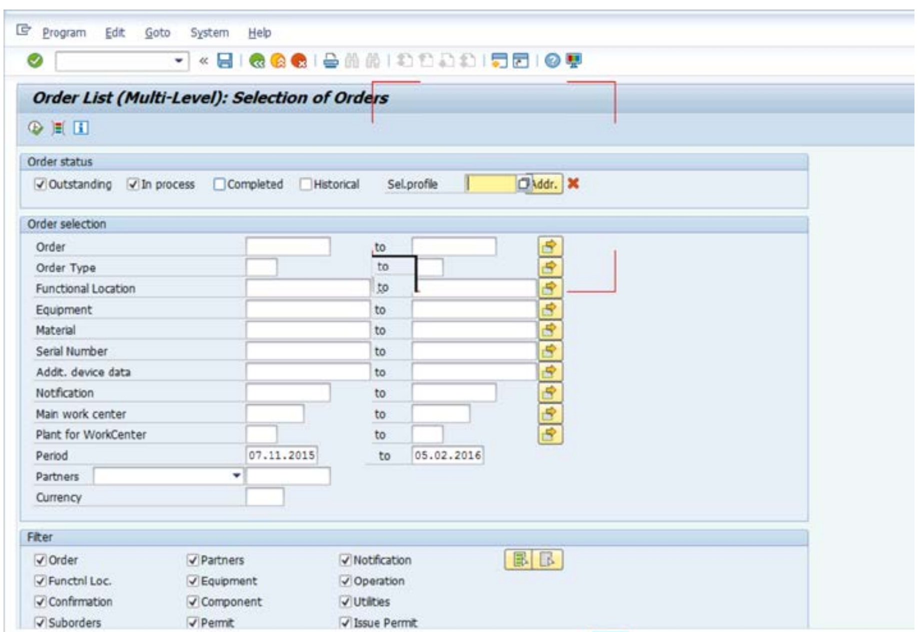
i. If you want to display the sub-orders for a specific number of orders, proceed as follows:

ii. Choose: Logistics > Plant maintenance > Maintenance processing > Order > Order List > Display (multi-level)

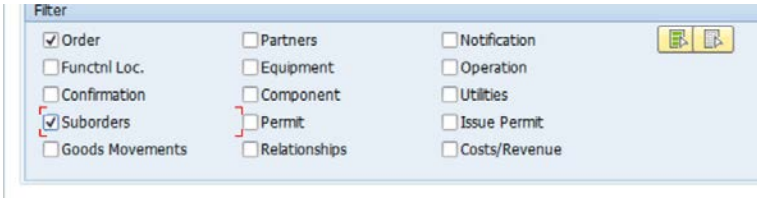
iii. Or using T-codes IW40 or IW40N will take you to the same place as the above steps.



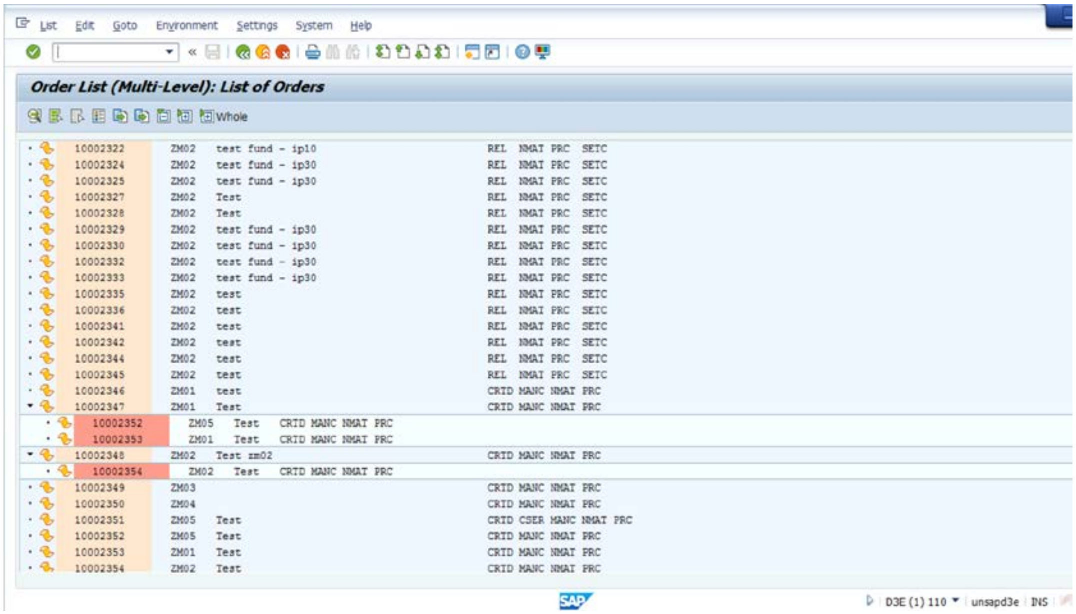
iv. A selection screen appears.



v. Complete the selection screen according to your requirements. In the section Filter, select the fields you require and the field Sub-Orders.



vi. Start the selection clicking on Execute, the system creates a multi-level order list that corresponds to your selection criteria. Here you also see the sub-orders assigned to the respective orders.



vii. You can click on any order or sub order to see the details.