TMSD Work Management System
Division Requests (File Tracking) – Creation

A. Creating the Request

1. Open transaction IW21
2. Enter a notification type of "T1" and click the "Notification" button (Notification)
3. Enter the following information:
   - Notification description – remember to start with "3000 " or "2000 " (set the first one up as a 3000 series order and the second one as a 2000 series order)
   - Functional location – enter "NC" in the field and click the "Hierarchy" button ( ) for options
   - Mode
   - Comments (big white box) – describe all pertinent information for the request
   - Planner group (Unit, Section, or Group the request is being assigned to)
   - Main work center (actual business unit performing the work)
   - Notification date (adjust if necessary)
   - Required start date (if applicable)
   - Required end date
   - Priority
4. Select partner/s or enter one-time customer/s using the "Partners" button ( ) – see Quick Card 11 ("Notifications – Adding Partners") for more information – click on the "Back" button ( ) to return to the main notification screen
5. Create the order by clicking on the "Create" button ( )
6. Enter an order type of "TS01" and click on the "Continue" button ( )
7. Change the user status by clicking on the "Set user status" button ( )
8. Click on the radio button next to "06 FTRK File Tracking" and click on the "Back" button ( )
9. Enter the "PM Activity Type" (PMActType)
10. Click on the "Operations" tab (Operations)
11. Enter operations (tasks) in the "Operation short text" column. Be sure to add/adjust work centers, personnel assignments, durations, and relationships as needed – see Quick Card 7 ("Order Creation") and Quick Card 8 ("Advanced Order Options") for more information.
12. Click on the "Enhancement" tab (Enhancement) and enter the case number, etc.
13. Click on the "Location" tab (Location) and enter the appropriate WBS element in the "WBS Element" field (for "2000" series notifications/orders enter "150149" in the "Cost Center" field).
14. Click on the "Additional Data" tab (Additional Data) and enter the functional code – skip this step for "2000" series notifications/orders.
15. Perform the settlement rule ( ) – see Quick Card 7 ("Order Creation") for more information.

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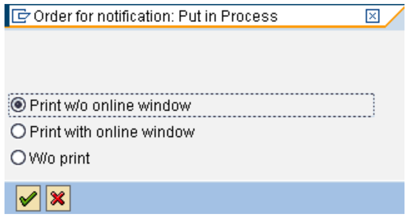
16. Put the order in process ( ) and print the shop paper:



17. Repeat steps 2-16 for the same request, but this time set it up as a 2000 series order.
18. Click the “Cancel” button ( ) to return to the main SAP screen.
19. Scan the request documentation on hand, including the shop papers, and save as a PDF file.
20. Attach the scanned request documentation (PDF file) to each order – see Quick Card 8 (“Advanced Order Options”) for more information.

B. Request Option 1 – Email Order to Assignee/s (no attachments)

1. Open the order using transaction IW32.
2. Click on the “Services for object” button ( ), select the “Maintenance order” line, and click on “Continue” ( )
3. Click on “Send object with note” ( )
4. Enter the text of the email in the large white box and enter the emails of the assignee/s in the “Recipient” column (one email address per row)
5. Click the “Send” button ( )

C. Request Option 2 – Email Order to Assignee/s (with external attachment)

1. Open the order using transaction IW32.
2. Click on the “Services for object” button ( ), select the “Maintenance order” line, and click on “Continue” ( )
3. Click on “Send object with note” ( )
4. Enter the text of the email in the large white box and enter the emails of the assignee/s in the “Recipient” column (one email address per row)
5. Click on “Create Attachment” ( ), find the file to be attached, and double-click on it (this step can be repeated as necessary to attach additional files)
6. Click the “Send” button ( )

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Division Requests (File Tracking) – Creation (continued)

D. Request Option 3 – Email Order to Assignee/s (with internal attachment)

1. Open the order using transaction IW32.
2. Click on the “Services for object” button ( ), select the “Maintenance order” line, and click on “Continue” ( )
3. Click on “Attachment list” ( )
4. Double-click on the internal file (“Title”) to be sent – this will open the file in “Livelink Archives Window Viewer”
5. Click “Send Documents” ( )
6. Click the “OK” button
7. Enter the recipients (To, Cc, etc.), enter a subject, type the text of the email, then click on the “Send” button ( )

E. Request Option 4 – Email Reply to Requestor/s

1. Open the notification using transaction IW22.
2. Click on “Send E Mail Confirmation” ( )
3. Highlight the requestor who will be the recipients and click the “Continue” button ( )
4. Enter a reply to the requestor in the “Notice text” field
5. Click the “Continue” button ( )
6. Click the “Save” button ( )
7. Repeat steps 1-6 as needed to send to more than one requestor