# Agenda

## Course Introduction

- Module 1: Umoja Preventive Maintenance Overview
- Module 2: Task Lists
- Module 3: Maintenance Items and Plans creation and update
- Module 4: Maintenance Plan scheduling
- Module 5: Preventive Maintenance Service Order processing
- Module 6: Reports

## Course Summary

## Course Assessment

## Course Survey
Introduction

Please share with us:

• Your Name
• Your Section/Unit
• # Years with the UN
• Interesting Fact About Yourself
Please consider the following guidelines during the training session:

• Turn your cell phone to silent mode. Please step out of the class to take any important phone call

• Please do not access your e-mail or the Internet outside of breaks

• Participate fully in the training session and respect each other’s contribution

• Reference of transactional steps covered in this course are included in the User Guide. Ensure to review it to learn how to perform the transactions

• Breaks are included at the discretion of the trainer
Course Overview

The purpose of the **Umoja Preventive Maintenance process** course is to illustrate the steps required for the Preventive Maintenance Planner (SD16) in the Umoja processes, such as creating and updating task lists, creating maintenance items, creating and updating maintenance plans, scheduling plans and processing preventive maintenance service orders.

**Prerequisite Review**

You should have completed the following prerequisite courses:

- Umoja Overview
- Umoja Master Data & Coding Block Overview
- Umoja Services Delivery Overview
- ECC Navigation

**Course Duration:** 4 hours
Course Objectives

After completing this course, you will be able to:

• List the key roles and responsibilities in the Preventive Maintenance process
• Explain the high level Preventive Maintenance processes
• Describe the elements involved in the Preventive Maintenance Process (task lists, maintenance items, maintenance plans and service orders)
• Explain the process for creating and updating task lists
• Explain the process for creating maintenance items
• Explain the process for creating, scheduling and updating maintenance plans
• Explain the process for processing service orders generated by maintenance plans
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Module 1 Objectives

After completing this module, you will be able to:

• List the roles and responsibilities involved in the Preventive Maintenance process
• Explain the high level Preventive Maintenance process
• Describe the Elements involved in the Preventive Maintenance Process
• Describe the Master Data elements in the Preventive Maintenance process
Why do we need preventive maintenance?

The Preventive Maintenance (or Preventative Maintenance) is the generic term for inspections, maintenance action and planned repairs, for which the time and scope of the work can be planned in advance.

The basis of the planned maintenance initiative can be:

• Manufacturer recommendation. Preventive Maintenance is generally conducted in accordance to Manufacturer recommendations. The manufacturer of technical objects might recommend certain procedures to ensure that the objects always function optimally.

• The initiative to establish the Preventive Maintenance programme can be defined by policy of the Organization or as best practices established by the responsible stakeholders.

• Legal requirements by the host country Code. For example elevators and life safety systems.

• Environmental requirements. Well maintained objects often have less impact on the environment.
Preventive Maintenance Benefits

Some of the benefits of using the Preventive Maintenance programme:

• Prolong high availability of the equipment
• Reduces the total maintenance cost by reducing breakdowns and accidents
• Improve energy efficiency and reduces the carbon footprint for equipment that emits Carbon Dioxide (well maintained equipment reduces the emissions)
• Avoids losing warranties on equipment
• Allows more efficient budget and contract management planning
How does preventive maintenance work in Umoja

• Based on the information defined in the Maintenance Plan (where, when and what to do) and the maintenance plan schedule transaction, the system triggers automated creation of service orders for the operations associated with the task list (list of operations that need to be performed on the defined equipment record, or records), responsibility, dates, reference objects, fund management details and cost.

• The processing of Service Orders (update, confirmation, technical completion, settlement, and business completion) is the same as other types of Service Order.
Roles & Responsibilities

The following Umoja Enterprise roles are involved in the Preventive Maintenance process:

**Preventive Maintenance Planner (SD16)**
- Create, update and monitor the Task Lists
- Create, Update and monitor Maintenance Items
- Create, update, schedule and monitor Maintenance Plans
- Process Preventive Maintenance Service Orders (Type ZM02)

**Service Deliver Order Releaser (SD04)**
- Review and Release Preventive Maintenance Service Orders (in case the Maintenance Plan is not set up to release the Order automatically).
The high level Preventive Maintenance process is as follows:

1. **Maintenance Task List**
   - What to do? Operation 1
   - Operation 2
   - Operation 3
   - Material
   - Strategy (Maintenance packages (Frequency))

2. **Maintenance Item**
   - What and Where to do? Reference Object Task List

3. **Maintenance Plan**
   - What, Where and When to do? Maintenance item Strategy with scheduling dates

4. **Schedule the Maintenance Plan**
   - Generate the Service Orders within the defined period

5. **PM Service Order**
   - Execute the Service Order, update, confirm and complete
Preventive Maintenance Components

Preventive Maintenance process consists of 4 components.

For each component there are specific processes for creation, update and processing.
• Task list is the group of operations (Tasks) that need to be performed as part of the required preventive maintenance programme for the specific equipment (or type of equipment). The operations are ordered chronologically.

• The Task lists do not refer to the specific technical object, but can be used for different equipment records that have similar requirements. For example, most of the AC Units within a plant can use only one Task list in one or multiple Maintenance Plans for the AC Units.

• Using general maintenance task lists, the Planner can define and manage sequences of maintenance tasks, and use them for work scheduling.

• Task lists are created within “Task list groups”, which are defined for each type of equipment.

• Task lists include the activity types to be used, amount of work to be done, detailed instructions and frequency of operations.

• The Operations within the Task List can be associated with the sequences (frequencies) within the Strategy and create the Maintenance Packages.
• Maintenance Item describes which maintenance tasks should take place regularly at the technical object (equipment, functional location and so on).

• Maintenance Items contains the following:
  i. Reference of the tech. object (Number, Location)
  ii. Planning Data (Plant, Work Centre, Maintenance Planner Group, Maintenance Activity Type, Business Area)
  iii. Task List
  iv. Location data, Account assignment and Fund

• Maintenance Item contains only one technical object

**Note:** A Maintenance Item can be created within the Maintenance by entering all the data directly in the plan
• Maintenance Plan combines the Task List, technical object and dates (scheduling parameters).

• By scheduling the Maintenance Plan the system automatically creates the Service Orders.

• A Maintenance Plan can contain multiple maintenance items (from one to hundreds).

• By scheduling the Maintenance plan the system generates a service order for each maintenance item based on the frequency (maintenance packages) defined in the task list.
Service Order

- Preventive Maintenance Service Orders (ZM02) are created by the system once a maintenance plan is scheduled based on the information in the plan (dates, task list & maintenance packages, maintenance items).
- Once the Service Order is created, it has to be released, then can be assigned and printed (the printout includes the detailed instructions of the operations).
- Upon the task being performed the service orders have to be confirmed.
- Once the orders is confirmed, it is ready to be technically completed, settled and business completed.
The following Master Data is used in the Preventive Maintenance process:

- **Financial information** relevant to the elements involved in the process (cost Centre, business area, fund)
- **Activity Types and Rates**, used in the task lists
- **Work Centres** and **Planner Groups** in charge of processing the maintenance activities
- **Equipment** records and Functional Locations as the reference object
Module 1 Summary

The key points covered in this module are listed below:

• Preventive Maintenance is a key factor in extending the life of the equipment

• The preventive maintenance process in Umoja includes the creation of the task list, the creation of maintenance items based on the existing technical object (equipment), the creation of the maintenance plan, the scheduling of the maintenance plan and the processing of the service orders

• The main role of the process is SD16 Preventive Maintenance Planner

• The Master Data used in the Preventive Maintenance programme are related to Fund Management, Activity Types and Rates, Work Centres & Planner Groups, Technical Object and Functional Location.
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## Course Assessment

## Course Survey
Module 2 Objectives

After completing this module, you will be able to:

• Explain the process for creation of task lists
• Explain the process for updating task lists
Task List - Overview

- Task list is the group of operations (Tasks) that need to be performed as part of the required preventive maintenance programme for the specific equipment (or type of equipment). The operations are ordered chronologically.

- The Task lists do not refer to the specific technical object, but can be used (should be used) for different equipment records that have similar requirements. For example, most of the AC Units within a plant can use only one Task list in one or multiple Maintenance Plans for the AC Units.

- Using general maintenance task lists, the Planner can define and manage sequences of maintenance tasks, and use them for work scheduling.

- Task lists are created within “Task lists groups”, which are defined for each type of equipment.

- Task lists include the activity types to be used, amount of work to be done, detailed instructions and frequency of operations.

- The Operations within the Task List can be associated with the sequences (frequencies) within the Strategy and create the Maintenance Packages.
Strategies

• Defines the rules for the sequence (frequency) of planned tasks (operations)
• Strategy contains general scheduling information. Can be assigned to an unlimited number of the task lists and maintenance plans as required.
• A maintenance strategy contains maintenance packages that can define the frequency of the operations.
• There are two strategies used in Umoja:
  – **ZMON**, the unit of measure for the frequencies is month (monthly, bimonthly, quarterly, semiannually, annually, biannually, triennially)
  – **ZWEEK**, the unit of measure for the frequencies is week (weekly, biweekly, 4 weeks for a monthly activity, 26 weeks for a semiannual activity and 52 weeks for an annual operation)
• The following screen represents the maintenance packages within ZMON strategy
Task List Groups

• Task lists are grouped into Task List Groups
• There are 26 pre defined groups in Umoja
• The group number should be aligned with the object type number of the equipment record that will use the task list
• The 26 available groups are displayed:

<table>
<thead>
<tr>
<th>Task List Group</th>
<th>Description</th>
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<tbody>
<tr>
<td>20000000</td>
<td>Mining and Well Drilling Machinery and Accessories</td>
</tr>
<tr>
<td>22000000</td>
<td>Building and Construction Machinery and Accessories</td>
</tr>
<tr>
<td>23000000</td>
<td>Industrial Manufacturing and Processing Machinery and Accessories</td>
</tr>
<tr>
<td>24000000</td>
<td>Material Handling and Conditioning and Storage Machinery and their Accessories and Supplies</td>
</tr>
<tr>
<td>24130000</td>
<td>Industrial Refrigeration</td>
</tr>
<tr>
<td>25000000</td>
<td>Commercial and Military and Private Vehicles and their Accessories and Components</td>
</tr>
<tr>
<td>26000000</td>
<td>Power Generation and Distribution Machinery and Accessories</td>
</tr>
<tr>
<td>27000000</td>
<td>Tools and General Machinery</td>
</tr>
<tr>
<td>30000000</td>
<td>Structures and Building and Construction and Manufacturing Components and Supplies</td>
</tr>
<tr>
<td>32000000</td>
<td>Electronic Components and Supplies</td>
</tr>
<tr>
<td>39000000</td>
<td>Electrical Systems and Lighting and Components and Accessories and Supplies</td>
</tr>
<tr>
<td>39120000</td>
<td>Electrical equipment and components and supplies</td>
</tr>
<tr>
<td>40000000</td>
<td>Distribution and Conditioning Systems and Equipment and Components</td>
</tr>
<tr>
<td>40150000</td>
<td>Industrial pumps and compressors</td>
</tr>
<tr>
<td>41000000</td>
<td>Laboratory and Measuring and Observing and Testing Equipment</td>
</tr>
<tr>
<td>42000000</td>
<td>Medical Equipment and Accessories and Supplies</td>
</tr>
<tr>
<td>43000000</td>
<td>Information Technology Broadcasting and Telecommunications</td>
</tr>
<tr>
<td>43200000</td>
<td>Components for information technology or broadcasting or telecommunications</td>
</tr>
<tr>
<td>44000000</td>
<td>Office Equipment and Accessories and Supplies</td>
</tr>
<tr>
<td>45000000</td>
<td>Printing and Photographic and Audio and Visual Equipment and Supplies</td>
</tr>
<tr>
<td>46000000</td>
<td>Defense and Law Enforcement and Security Equipment and Supplies</td>
</tr>
<tr>
<td>47000000</td>
<td>Cleaning Equipment and Supplies</td>
</tr>
<tr>
<td>48000000</td>
<td>Service Industry Machinery and Equipment and Supplies</td>
</tr>
<tr>
<td>52000000</td>
<td>Domestic Appliances and Supplies and Consumer Electronic Products</td>
</tr>
<tr>
<td>56000000</td>
<td>Furniture and Furnishings</td>
</tr>
<tr>
<td>95000000</td>
<td>Land and Buildings and Structures and Thoroughfares</td>
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To Create a Task List use transaction IA05

Select the task list group

In the list of existing task lists in the group, select new enter (F6) to create a new task list (or Edit> New entries)

Complete the following information in Header:

- The name of the task list and entity, for example “Split AC Units UNON”.
- Enter the Planning plant
- Enter the work Centre
- Usage - select “4”
- Enter the Planner Group
- Status select “4” (released)
- System condition select “1” (in operation)
- Maintenance Strategy select the appropriate strategy “ZMON” or “ZWEEK”
To enter the operations, select the “Operations” button; in the operations screen enter the following:

- **Operation Description**
- **Un** - (unit of measure is defined in the Activity Type. Generally it is .
- **No** – (is the number of technicians required)
- **Duration**
- **Un** – (unit of measure defined in the Activity Type. Usually is “H” for labour)
- In column “C” select 2 (calculate work)
- Select the Activity type from the drop down list. The activity type is master data assigned to Work Centre. **Select the one that start with S (Statistical).** (Note: The Statistical activity type will display the Cost but will NOT consume the budget).

Note: repeat the process for each Operations
• To enter the operations detailed tasks double click on “LT” (Long Text).

• Type the operation text in the text editor or convert (past) already prepared detailed steps of the maintenance operation. Operations will appear in the service order once the Maintenance Plan will be scheduled.

• Once entered the operation (task) text return to operations screen with the “Back” icon.
Once all the operations have been entered, include the frequency by selecting the button MntPack (maintenance package).

Note: The Planner is able to select one of the following periods (based on the strategy selected, in this case ZMON):

- Weekly, Biweekly, Monthly, Bimonthly, Quarterly, Semiannually, Annually, Biannually, Triennially

Once completed, save and the task list will be created.
Updating a Task List

- To update Task list use t-code IA06
- Select the Task list Group and Plant
- In the new screen select the Task list and update the Operation and/or Header
Create and Updating a Task List restriction

• **Note:** The Task List creation and update is restricted at Plant level. Therefore, if the PM Planner is not authorized to access or create the Task List in the chosen Plant the following error message will appear:
Learning Checkpoint 1

Why does the planner need to define the strategy in a task list

Select the correct option.

A. To determine who will perform the maintenance
B. To determine the frequency of the operations
C. To determine the detailed tasks to be performed
D. All of the above
Learning Checkpoint 1

Why does the planner need to define the strategy in a task list

Select the correct option.

A. To determine who will perform the maintenance
B. **To determine the frequency of the operations**
C. To determine the detailed tasks to be performed
D. All of the above

Option B is the correct answer. Strategies are relevant to the frequency of the maintenance operations.

In Umoja we will use 2 strategies:
- ZMON when the strategy UoM is month
- ZWEEK when the strategy UoM is week
Module 2 Summary

The key points covered in this module are listed below:

• The process for creating task lists, including the header, the operations and the frequency
• The task list groups available in Umoja
• The Strategies available and when to use each one
• The process for updating task lists
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Module 3 Objectives

After completing this module, you will be able to:

• Explain the process for creating maintenance items
• Explain the process for updating maintenance plans
Maintenance Item describes which maintenance tasks should take place regularly at the technical object (equipment, functional location and so on).

Maintenance Items contains the following:

i. Reference of the tech. object (Number, Location)
ii. Planning Data (Plant, Work Centre, Maintenance Planner Group, Maintenance Activity Type, Business Area)
iii. Task List
iv. Location data and Account assignment and Fund

Maintenance Item contains only one technical object.

Note: A Maintenance Item can be created within the Maintenance by entering all the data directly in the plan.
• Maintenance Plan combines the Task List, technical object and dates (scheduling parameters).

• By the scheduling the Maintenance Plan the system automatically creates the Service Orders.

• A Maintenance Plan can contain multiple maintenance items (from one to hundreds).

• By scheduling the Maintenance plan the system generates a service order for each maintenance item based on the frequency (maintenance packages) defined in the task list.
Maintenance Plans

- The following scheme explains the interaction of the task list, maintenance items and plans, and the frequency of the operations:
The PM planner is responsible for creating the maintenance items, creating the plans and updating the plans.
Use the T-code **IP04** to create a Maintenance Item:

- In Maint Plan Category, select Maintenance Order.
- In Maintenance Strategy select ZMON or ZWEEK depending on the strategy of the task list to be used.

**Note:** Remember that ZMON uses monthly based frequencies and ZWEEK weekly.
Then complete the following:

- Maintenance Item: Name of the equipment and ID
- Equipment number
- Planning plant
- Order type ZM02
- Maint Planner group (F00, L00, etc.)
- Work Centre
- Business Area
- Task list type: A
- Task list group and group counter (the ones created that apply for the Item)
- Fund (in the Fund tab) (10UNA, etc.)

**Note:** One Maintenance Item has to be created for each equipment maintained.
Create Maintenance Plan

- To create a Maintenance Plan with the Strategy, use transaction IP42
- In Maint Plan Category, select Maintenance Order
- In Maintenance Strategy select ZMON or ZWEEK, depending on the strategy of the task list to be used
- At the bottom, where it says “Maintenance Item” hit the “Assign more items” icon

**Note:** When selecting the maintenance items the warning may pop-up; if this case select check icon (OK) in pop-up
Create Maintenance Plan

Next, in the selection criteria, select the maintenance items that were created for the Plan.

By the filtering conditions, multiple maintenance items could be listed. Select the rows with the items that should be part of the Maintenance Plan (these rows will be highlighted).

Then select the check icon, 

The system will assign the Maintenance Item in the Plan. All Maintenance item information will be included in the Plan.
Create Maintenance Plan

• Enter the maintenance plan short name at the top

• Select the Maintenance Plan Scheduling Parameters tab
  In the Scheduling Period field, complete the information
  Scheduling period, which will define how long the plan
  will issue the orders for…. (For example one year)

• Enter the date for Start of Cycle

• Save
Update Maintenance Plan

• Use T-Code IP02

• Enter the Maintenance Plan number. In case the Planner needs to review the Maintenance Plan list and select the M. Plan from the list, please follow the instruction:
  – Select the Matchcode near the MaintenancePlan
  – Enter selection criteria in the new screen.
  – The system displays the list of the Plans that match your selection criteria.
  – Select the Maintenance Plan

• Then update the Maintenance Plan
Maintenance Plan restriction

Maintenance Plan & Item are restricted at the Plant and Planner Group level

- If the PM Planner is not authorized to update the Maintenance Plan & Item in the chosen Plant the displayed error message will appear.
Maintenance Plan restriction

Maintenance Plan & Item are restricted at the Plant and Planner Group level

- If the PM Planner is not authorized to update the Maintenance Plan & Item within the Maintenance Planner Group the displayed error message will appear.

![Error message: No authorization for changing maintenance planner group T00](image)
Learning Checkpoint 1

Which of the following is true?

Select the correct option.

A. When a maintenance plan is created, the frequency is defined
B. Maintenance plans cannot be updated once created
C. There is one plan per equipment
D. One Maintenance Plan can include multiple maintenance items
Learning Checkpoint 1

Which of the following is true?

Select the correct option.

A. When a maintenance plan is created, the frequency is defined
B. Maintenance plans cannot be updated once created
C. There is one plan per equipment
D. One Maintenance Plan can include multiple maintenance items

Option D is the correct answer. One maintenance plan can include one or multiple maintenance items.
Module 3 Summary

The key points covered in this module are listed below:

• The process for creating maintenance items
• The process for creating maintenance plans
• The process for updating maintenance plans
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Module 4 Objectives

After completing this module, you will be able to:

• Explain the process for scheduling a maintenance plan
Scheduling Maintenance Plans

There are 2 processes that can be used to schedule maintenance plans. The Planner can schedule plans one by one, or Planner can schedule multiple plans at the same time using a batch processing.

**Note**: The Planner should be sure which Plan will be scheduled; it is advised that until the user is fully familiar with the process, the plans are scheduled one by one.
Scheduling a single plan

- Use transaction **IP10** to schedule a single plan
- Enter the Maintenance Plan number or using matchcode and filters which is explained
- Then select the “Start” button, the pop up will display the Start of Date created in the Maintenance Plan. The date can be updated.
Scheduling a single plan

- The system will generate scheduled calls.
- If the generated call (read service order) is due to be executing the status of the call will be “Save to call”.
- If the date is not due, the planner can start the call early (service order) by selecting the row and clicking on the green (release) flag at the bottom.
- Upon selecting the button Save, the plan is scheduled.
Scheduling a single plan

• When you enter the scheduled plan again, the status of the call which is due is “New start called”

• The call has been changed to “called”. The system indicates that the Service Orders have been created

• To review the service order select the eyeglasses icon at the bottom. The service order (or list of the service orders, in case there are many maintenance items) will be displayed
Scheduling multiple plans

To schedule multiple Plans, use transaction **IP30**

- In the next screen select the criteria and provide the list of the plans to be scheduled
- Execute the criteria
- Display log will provide the important messages related to the schedule and Service Orders that are being generated
- Review log and click the back arrow
- Select OK in the window. The plans have been scheduled

**Note**: The Cycle start date has to be populated for all plans before processing IP30
Learning Checkpoint 1

Which of the following T-codes is used to schedule a single plan?

Select the correct option.

A. IP10
B. IP01
C. IP30
D. PLNSCHD
Learning Checkpoint 1

Which of the following T-codes is used to schedule a single plan?

*Select the correct option.*

A. IP10  
B. IP01  
C. IP30  
D. PLNSCHD

Option A is the correct answer. T-code IP10 is used to schedule a single plan.
Module 4 Summary

The key points covered in this module are listed below:

• The process for scheduling a single plan
• The process for scheduling multiple plans in a batch process
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Module 5 Objectives

After completing this module, you will be able to:

• Explain the process for updating a PM service order
• Explain the process for printing a PM service order
• Explain the process for confirming a PM service order
• Explain the process for closing a PM service order
Preventive Maintenance Service Orders (ZM02) are generated once a maintenance plan is scheduled based on the information in the plan (dates, task list, maintenance items).

Once the Service Orders are created they can be assigned to a Person responsible and printed (the printout includes the detailed instructions of the operations).

After the work is performed, the service orders have to be confirmed.

Upon confirmation the next step is to technically complete the service order, settle and business complete.
Processing a Service Order

• The SD.16 (PM Planner) can update the Service Order.
• SD04 (SD Order Releaser) can release the order.
• Once the Order is released, it can be printed out, including the detailed instructions for the operations, and then confirmed and closed.
By using T-Code IW38 the PM Planner can enter filter criteria to get the list of the service orders (criteria by Plant, date Planner group and so on)

The report will be created with the Service Orders that match the criteria entered by Planner. Select the Service Order(s) from the list to update.
Modify the information in the service order as required

Operations – represent activities that have to be involved in the maintenance activities

Components - represents the material needed for the maintenance process

Upon modifying required fields the PM Planner then saves the order(s)

**Note:** IT IS IMPORTANT THAT UNTIL FURTHER NOTICE DO NOT USE the COMPONENTS TYPE L (STOCK ITEM BUDGENT RELEVANT) OR N (NON STOCK ITEMS), ONLY USE TYPE Z (STOCK ITEMS NON BUDGET)
In case the Service Order in not released SD.04 (SD Releaser) can release the Order by respecting the following instruction:

- Run **IW32** and enter the **Order** number
- Review Order information
- Click the **Release** icon,
- Save

**Note**: There is an option to release groups of service orders by using IW38
Update Service Order

- After the order has been updated and released, the PM Planner can print the Service Order
- In the menu bar, select Order > Print >
  - In the pop up select Print Preview to view the order, or Print/Fax to print it
  - The print out includes all the detailed operations of long text of the task list
Update Service Order

- After the work has been performed, the order needs to be confirmed (provide the actual work information that has been involved in performing the tasks)
- Use T-Code IW41
- Enter the Service Order Number

In the screen that appears, complete the actual work field with the real data (the planned data is populated by default, enter the actual work in case it is different from planned work)
- Make sure that the “final confirmation” and “No remaining work” lines are clicked
- Complete this for all operations and save
Once the order has been confirmed, it can be technically completed. To technically complete service orders, use t-code IW32, enter the service order number, then select the flag icon and Save. In addition, to technically complete multiple orders, use t-code IW38 and list multiple orders, select the orders you want to complete and hit the flag icon. The final steps are settlement and business completion. These steps are performed by financial Users. Note: to obtain more info use Umoja Service Order Management in Umoja Training.
Learning Checkpoint 1

How many Service Orders are created by each maintenance plan?

Select the correct option.

A. Only one
B. Only one per equipment
C. One per equipment per frequency period
D. None
Learning Checkpoint 1

How many Service Orders are created by each maintenance plan?

Select the correct option.

A. Only one  
B. Only one per equipment  
C. One per equipment per frequency period  
D. None

Option C is the correct answer. Maintenance plans create one service order per equipment for each frequency defined in the task list.
Module 5 Summary

The key points covered in this module are listed below:

• The process for updating, releasing, printing, confirming and closing Preventive Maintenance Service Orders
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<th>Module</th>
<th>Description</th>
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</table>
## Preventive Maintenance Reports

These are the reports related to Preventive Maintenance:

<table>
<thead>
<tr>
<th>T-Code</th>
<th>Name</th>
<th>When to use</th>
</tr>
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<tbody>
<tr>
<td>IA08</td>
<td>Task List list (Change)</td>
<td>To generate a report of existing task lists with a defined filtering, and once the list is displayed, be able to change them</td>
</tr>
<tr>
<td>IA09</td>
<td>Task List list (Display)</td>
<td>To generate a report of existing task lists with a defined filtering.</td>
</tr>
<tr>
<td>IA10</td>
<td>Task list multi-level list (Display)</td>
<td>To generate a report of existing task lists with a defined filtering. Task lists are displayed with selected details.</td>
</tr>
<tr>
<td>IP15</td>
<td>Maintenance Plan list (Change)</td>
<td>To generate a report of existing maintenance plans with a defined filtering, and once the list is displayed, be able to change them</td>
</tr>
<tr>
<td>IP16</td>
<td>Maintenance Plan list (Display)</td>
<td>To generate a report of existing maintenance plans with a defined filtering.</td>
</tr>
<tr>
<td>IP17</td>
<td>Maintenance Item report (Change)</td>
<td>To review a list of Maintenance Items</td>
</tr>
<tr>
<td>IP18</td>
<td>Maintenance Item report (Display)</td>
<td>To review a list of Maintenance Items</td>
</tr>
<tr>
<td>IW38</td>
<td>Order list (Change)</td>
<td>To list service orders and eventually change them</td>
</tr>
<tr>
<td>IW39</td>
<td>Order list (Display)</td>
<td>To list service orders and view them.</td>
</tr>
</tbody>
</table>
Course Introduction

Module 1: Umoja Preventive Maintenance Overview

Module 2: Task Lists

Module 3: Maintenance Items and Plans creation and update

Module 4: Maintenance Plan scheduling

Module 5: Preventive Maintenance Service Order processing

Module 6: Reports

Course Summary

Course Assessment

Course Survey
Course Summary

The key points covered in this course are listed below:

- The key roles and responsibilities in the Preventive Maintenance process
- The high level Preventive Maintenance processes
- The elements involved in the Preventive Maintenance Process (task lists, maintenance items, maintenance plans and service orders)
- The process for creating and updating task lists
- The process for creating maintenance items
- The process for creating, scheduling and updating maintenance plans
- The process for processing service orders generated by maintenance plans
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<td>Module 6: Reports</td>
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Course Assessment

Now that you have completed all the modules in this course, you can test your knowledge by completing the Course Assessment.

To receive credit for completing this course, you must pass this assessment with a minimum score of 90%.

To complete the assessment you must return to the Learning Management System:

1. Log into Inspira
2. Navigate to Main Menu -> Self-Service -> Learning -> My Learning
3. Search for the name of the course under the My Learning Activities section
4. Click the Start link of the course assessment
5. Click the Submit button once you have completed the assessment
## Agenda

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Course Survey

Your feedback is important to the continuous improvement of our training programme.

Please complete the evaluation for this course using the following steps:

1. Log into Inspira

2. Navigate to Main Menu -> Self-Service -> Learning -> My Learning

3. Search for the name of the course under the My Learning Activities section

4. Click the Start link of the course survey

5. Click the Submit button once you have completed the course survey
Congratulations! You have successfully completed the *Umoja Preventive Maintenance* course.