LMS-1933
Umoja Preventive Maintenance Training

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

Ground Rules

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

No Phones

Do Not Access E-mail

Participate

Ask Questions

User Guide

Breaks

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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

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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

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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.

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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

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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.

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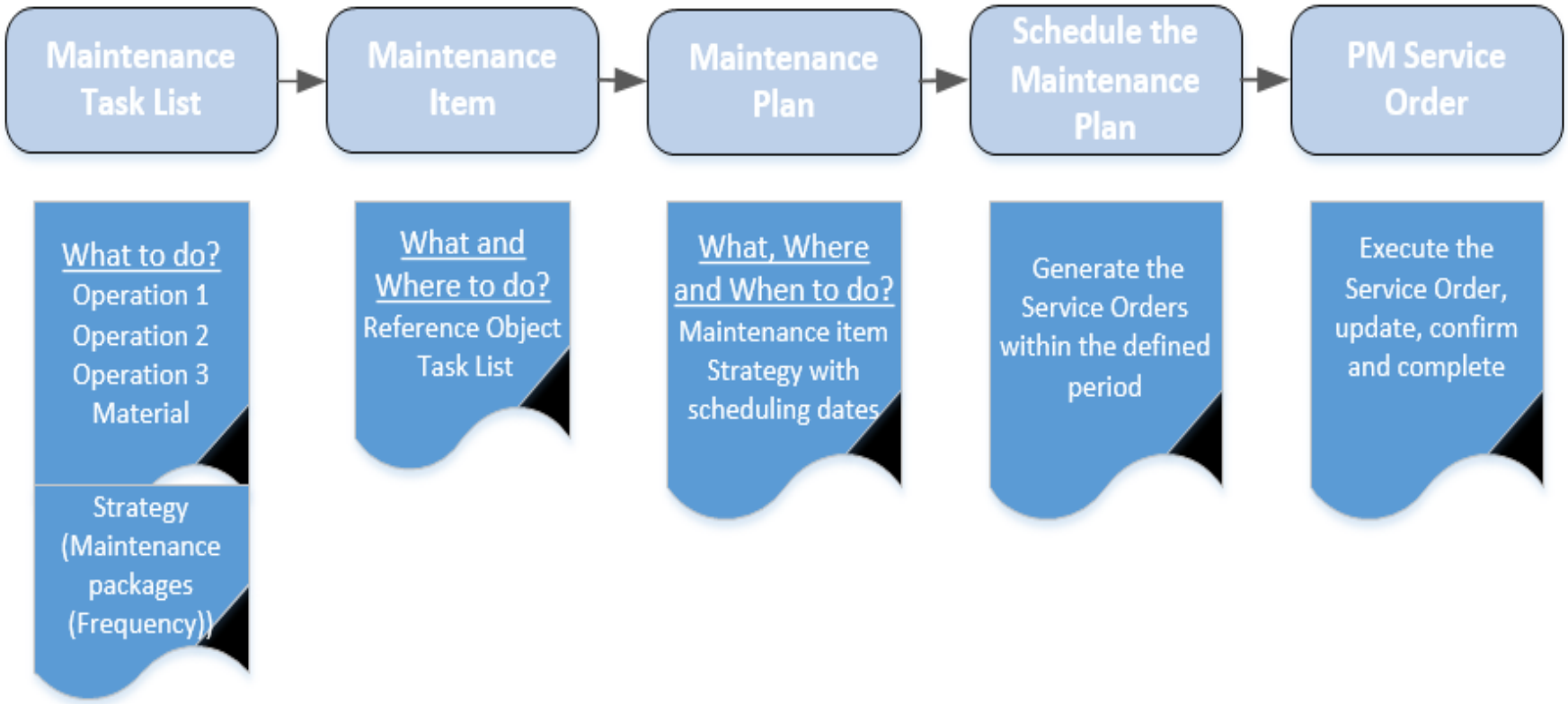
Roles & Responsibilities

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.

Preventive Maintenance Process

The high level Preventive Maintenance process is as follows:



Preventive Maintenance Components

Preventive Maintenance process consists of 4 components.

For each component there are specific processes for creation, update and processing.

Task List

Maintenance Item

Maintenance Plan

Service Order

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Task List

Task List

- 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.

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Maintenance Item

Maintenance Item

- 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

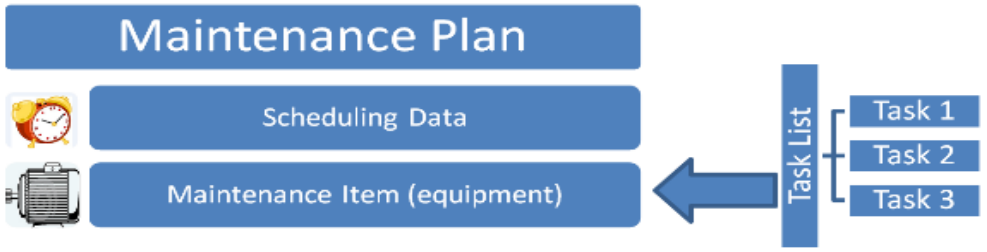
- Maintenance Item contains only one technical object

Note: A Maintenance Item can be created within the Maintenance by entering all the data directly in the plan

Maintenance Plan

Maintenance 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

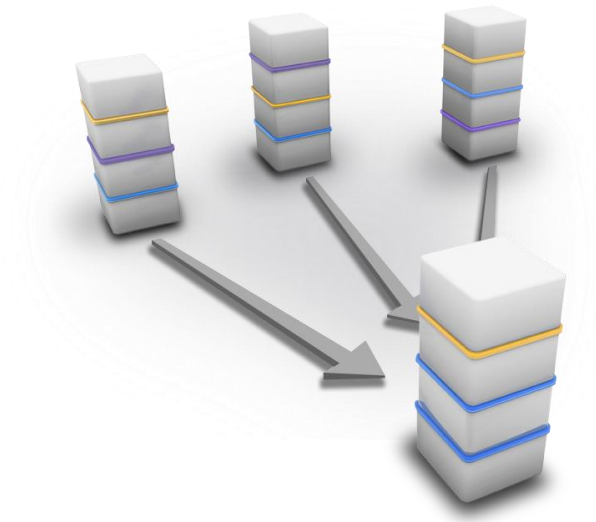
Service Order

- 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

Master Data in Preventive Maintenance

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 maint. 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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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

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Task List - Overview

Task List

- 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.

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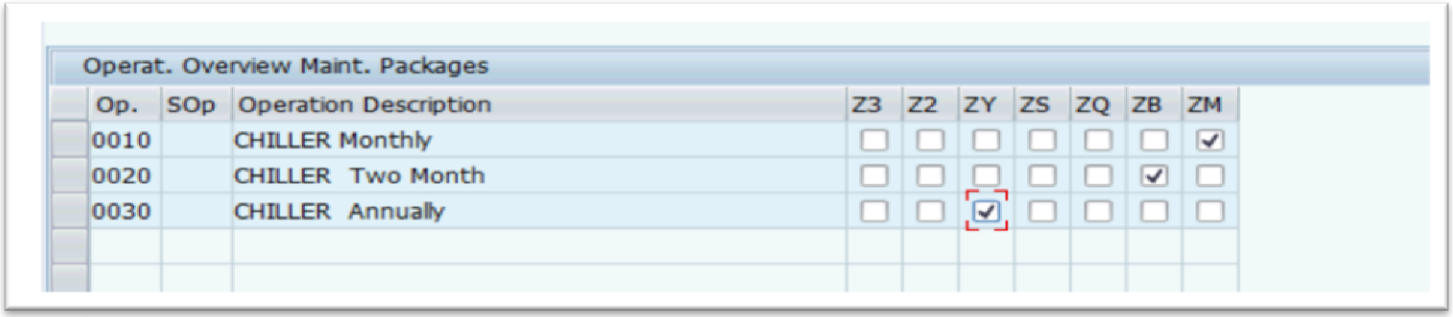
Strategies

- 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

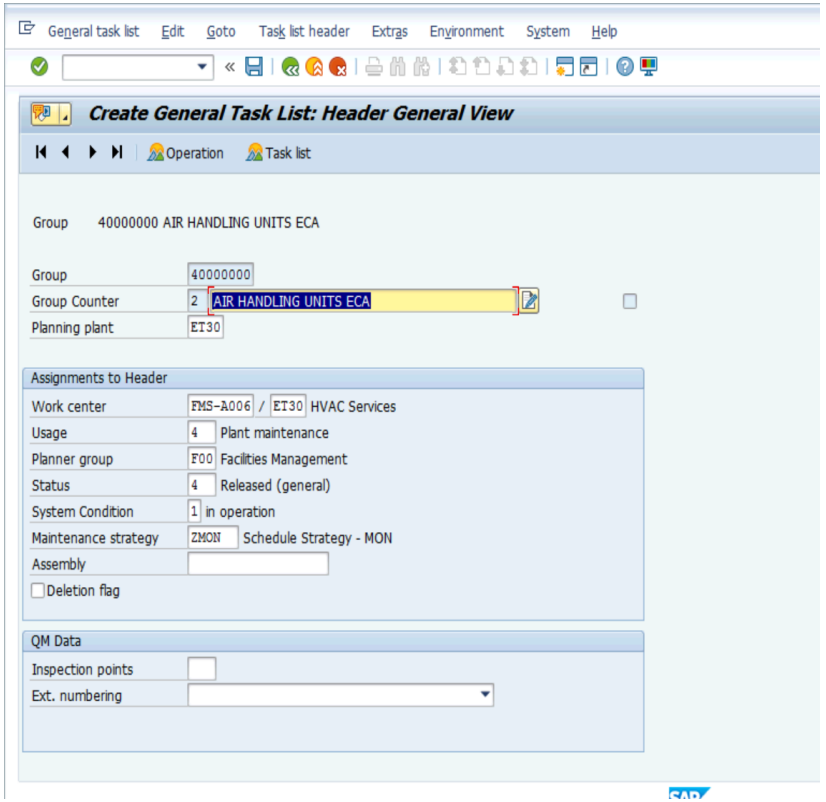
- Task lists are grouped into Task List Groups
- There are 26 pre defined groups in Umoja
- The group number should be aligned with the object type number of the equipment record that will use the task list
- The 26 available groups are displayed:

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

Creation of a Task List

Creation of Task List Header | Creation of Task List Operations | Adding Frequency to Operations

- 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”



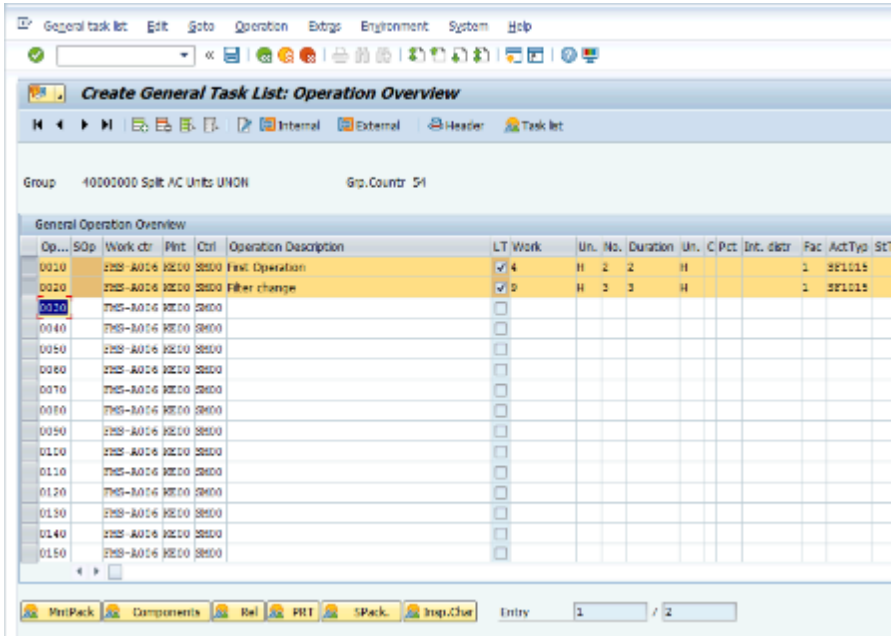
Creation of a Task List

Creation of Task List Header | **Creation of Task List Operations** | Adding Frequency to Operations

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).

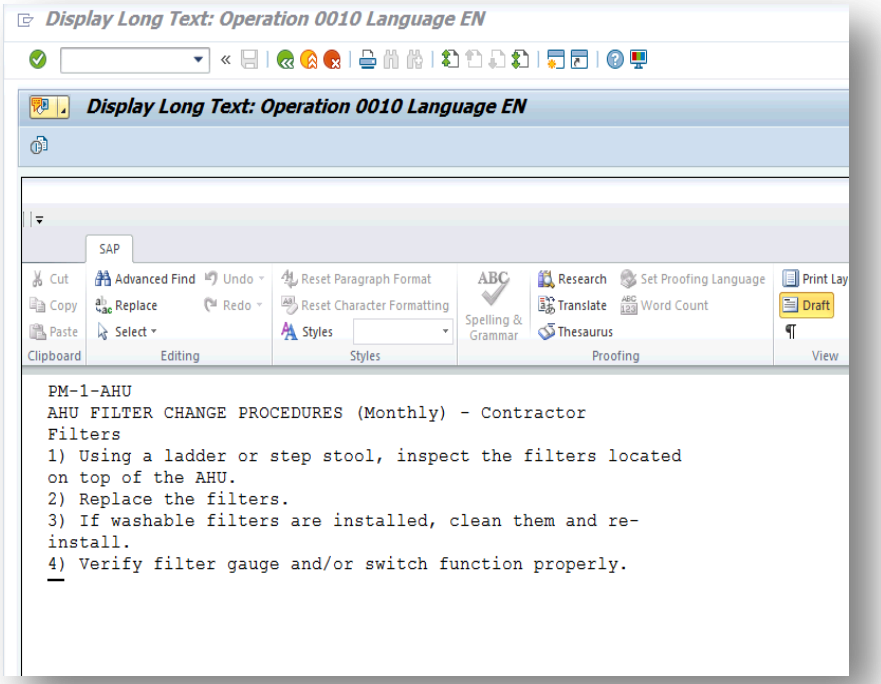
Note: repeat the process for each Operations



Creation of a Task List

Creation of Task List Header | **Creation of Task List Operations** | Adding Frequency to Operations

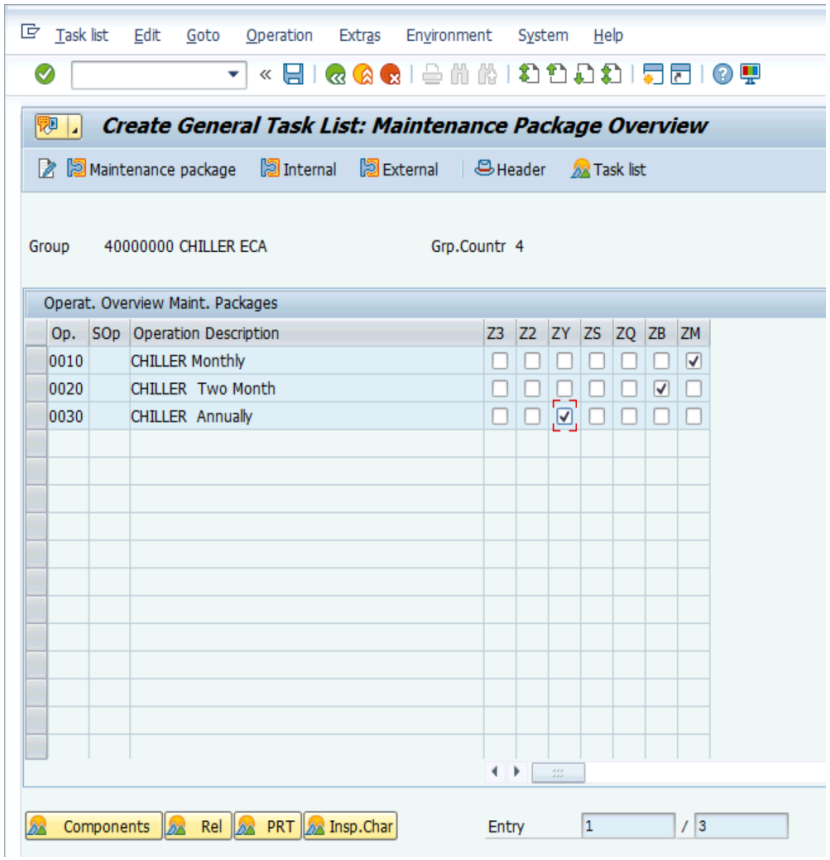
- To enter the operations detailed tasks double click on “LT” (Long Text).
- Type the operation text in the text editor or convert (past) already prepared detailed steps of the maintenance operation. Operations will appear in the service order once the Maintenance Plan will be scheduled.
- Once entered the operation (task) text return to operations screen with the “Back” icon



Creation of a Task List

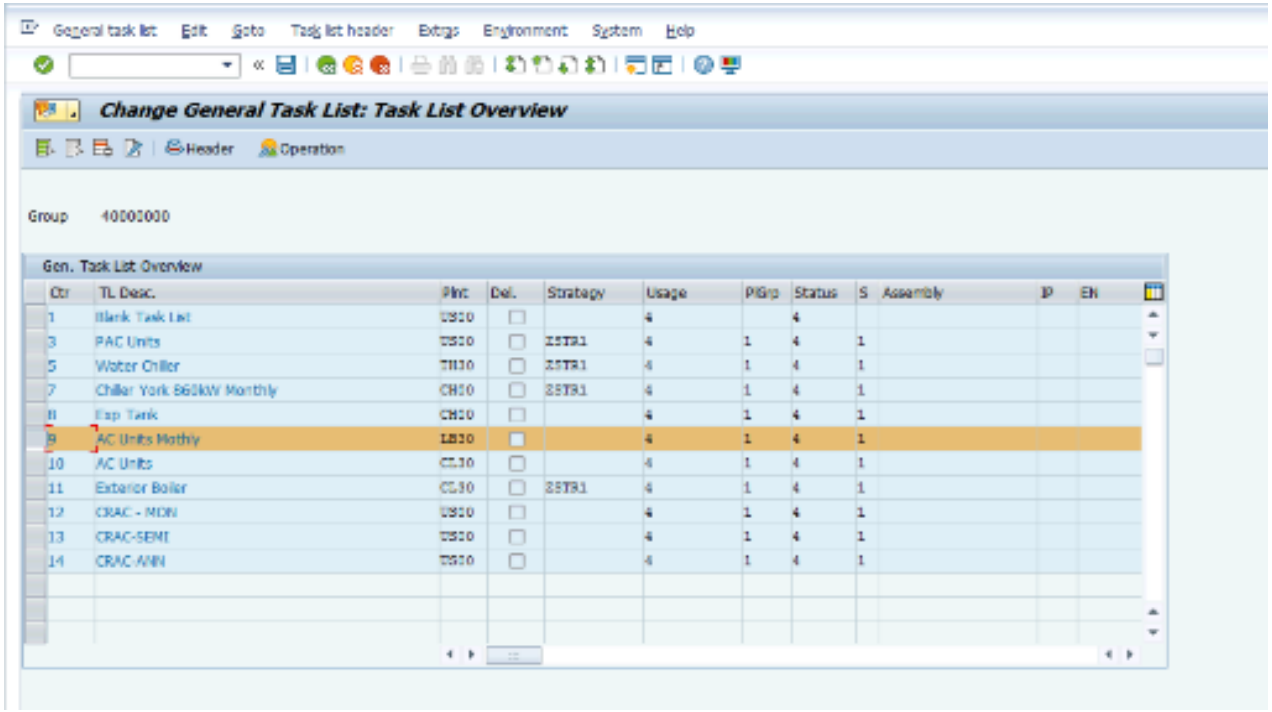
Creation of Task List Header → Creation of Task List Operations → **Adding Frequency to Operations**

- 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.



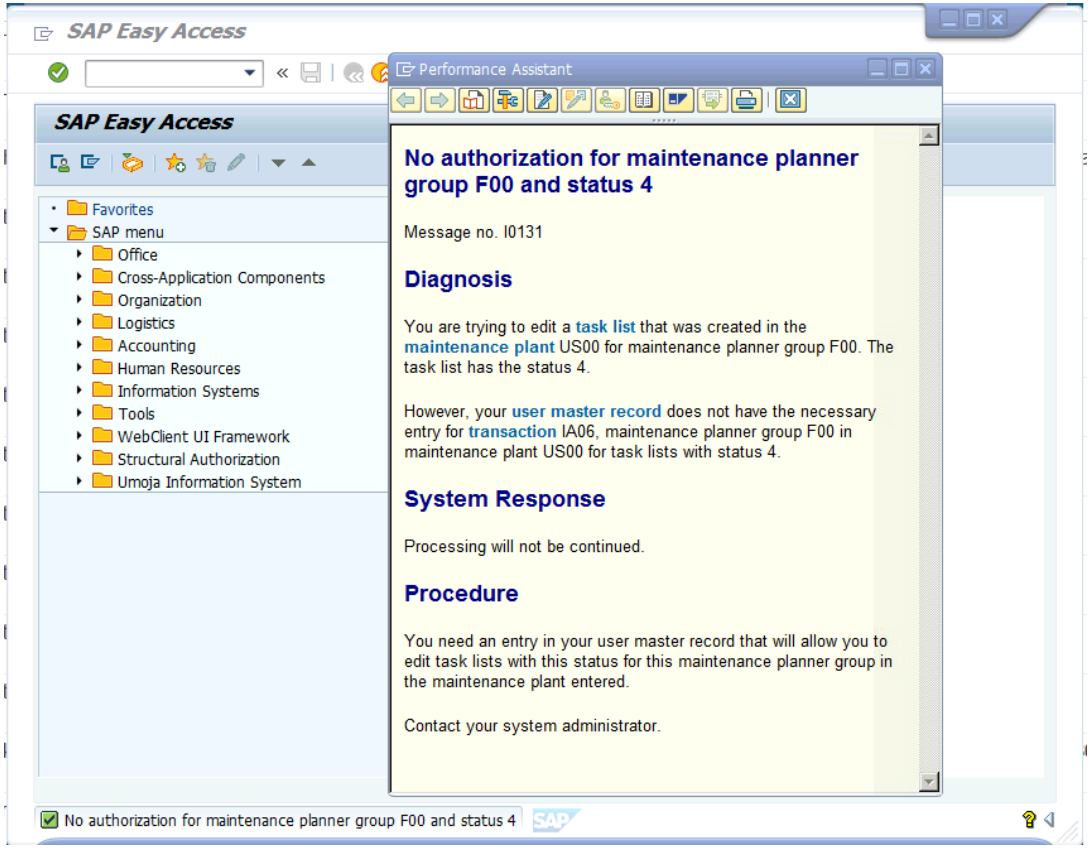
Updating a Task List

- 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

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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

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Maintenance Item

Maintenance Item

- 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

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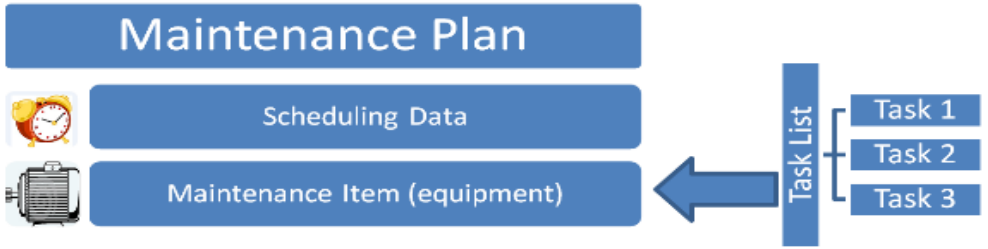
Maintenance Plan

Maintenance 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



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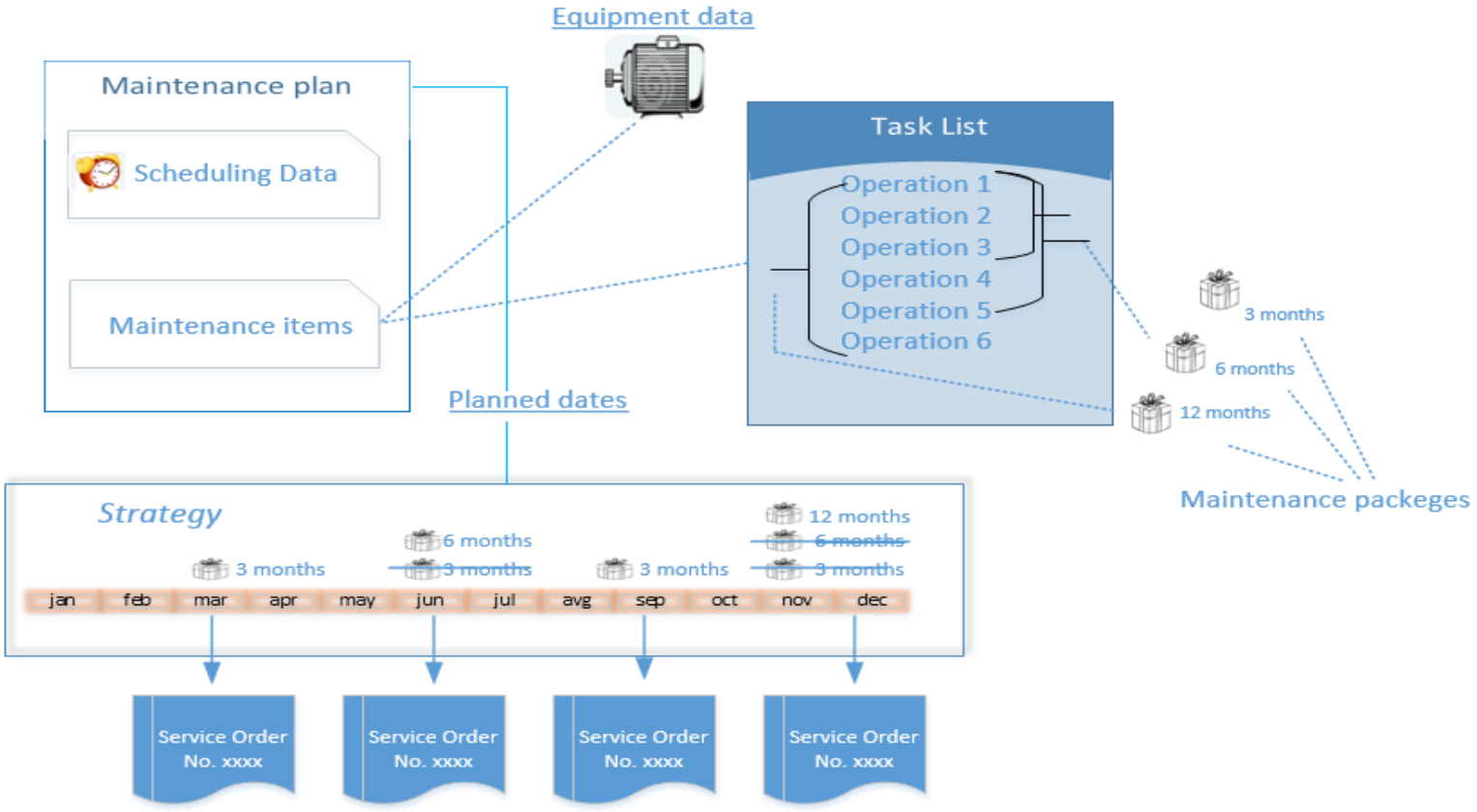
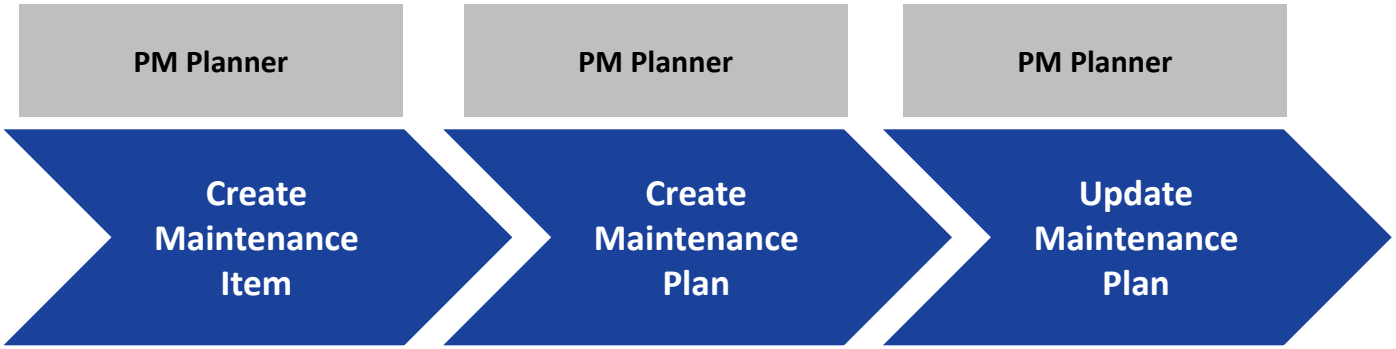
Maintenance Plans

- The following scheme explains the interaction of the task list, maintenance items and plans, and the frequency of the operations:



Maintenance Items and Plans

The PM planner is responsible for creating the maintenance items, creating the plans and updating the plans

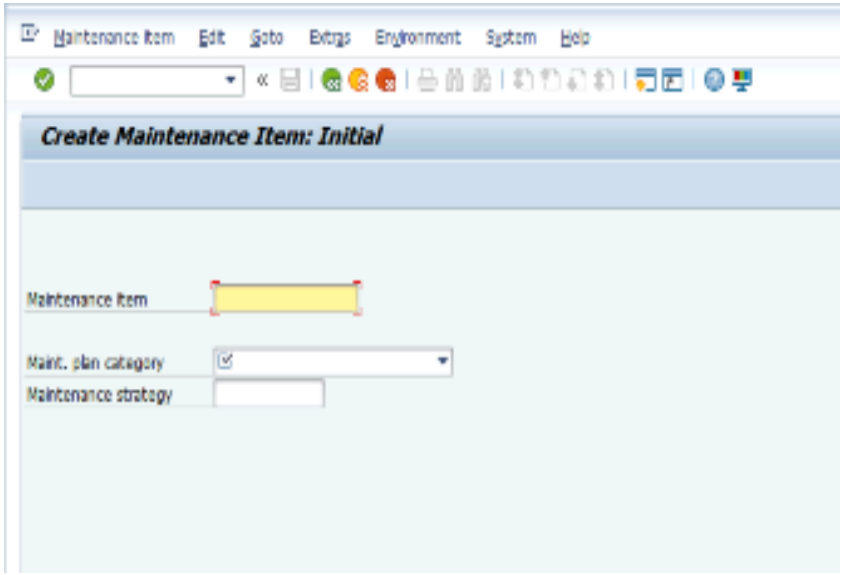


Create Maintenance Item

Create Maintenance Item → **Create Maintenance Plan** → **Update Maintenance Plan**

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.

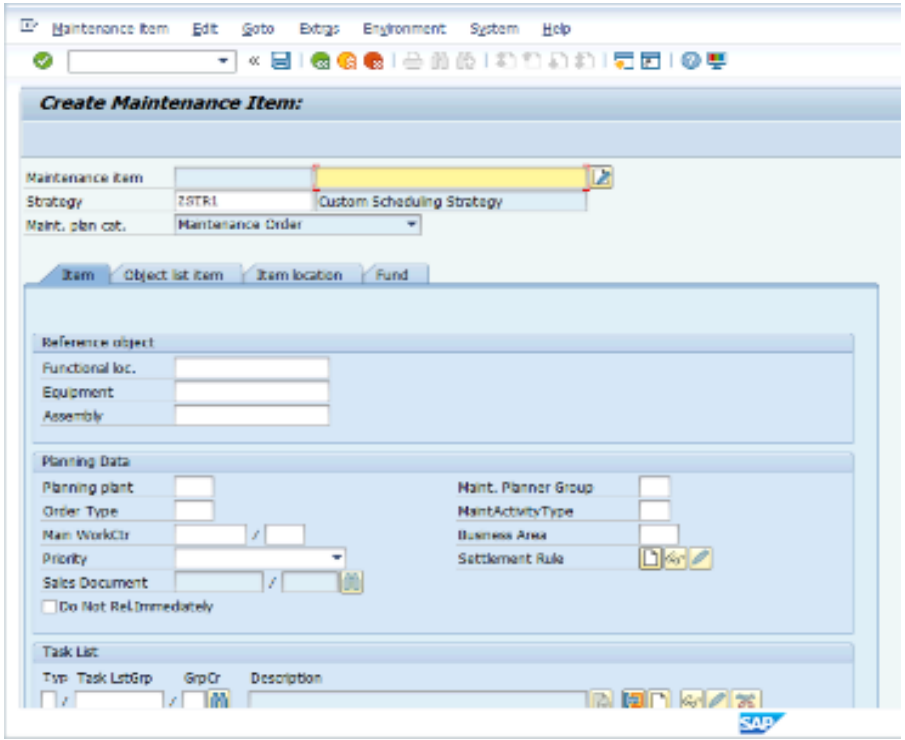


Note: Remember that ZMON uses monthly based frequencies and ZWEEK weekly

Create Maintenance Item

Create Maintenance Item → **Create Maintenance Plan** → **Update Maintenance Plan**

- Then complete the following:
  - Maintenance Item: Name of the equipment and ID
  - Equipment number
  - Planning plant
  - Order type ZM02
  - Maint Activity type 002
  - 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.)

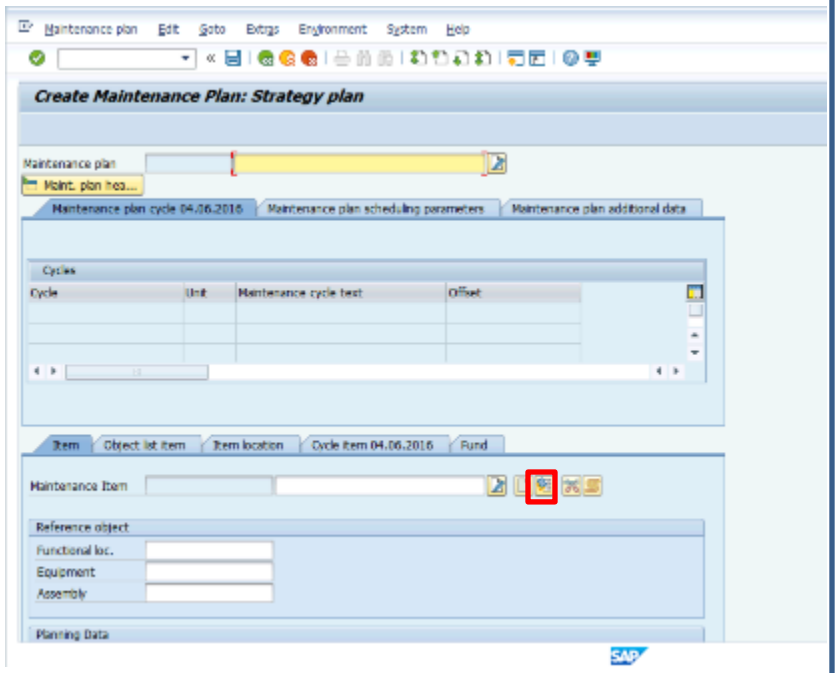


Note: One Maintenance Item has to be created for each equipment maintained

Create Maintenance Plan

Create Maintenance Item → **Create Maintenance Plan** → Update 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

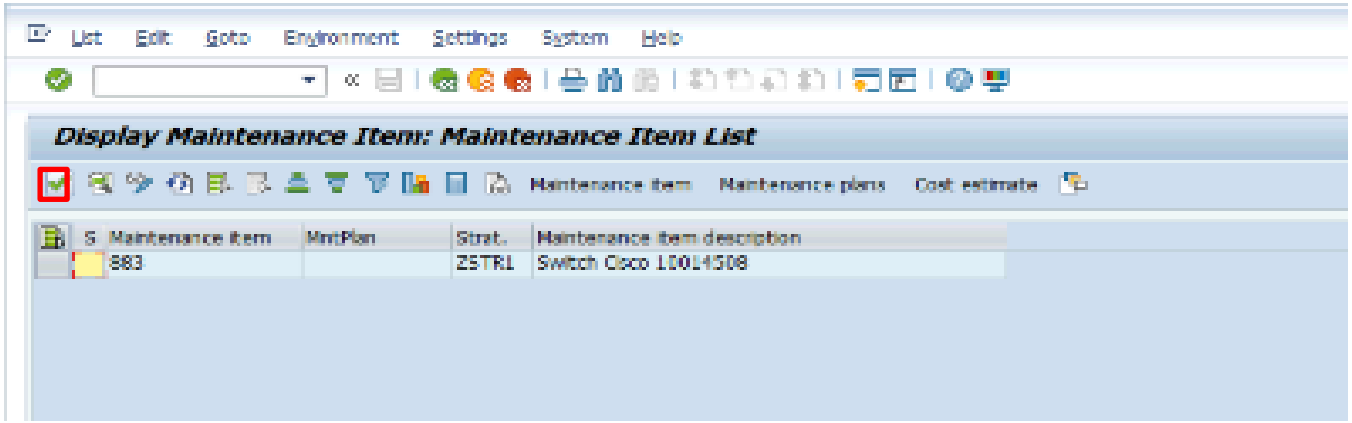


Note: When selecting the maintenance items the warning may pop-up; if this case select check icon (OK) in pop-up

Create Maintenance Plan

Create Maintenance Item → **Create Maintenance Plan** → Update Maintenance Plan

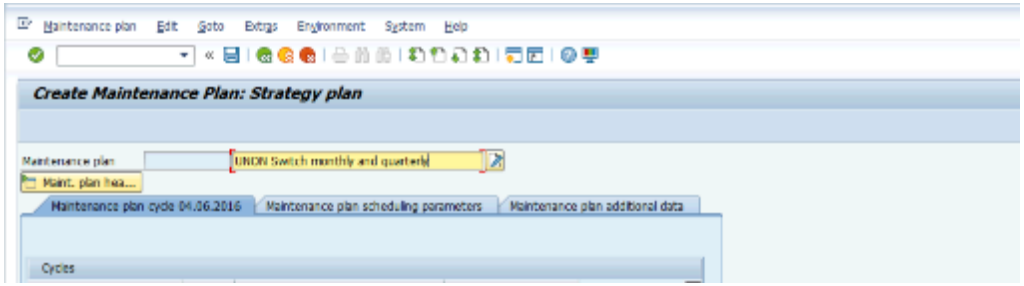
- Next, in the selection criteria, select the maintenance items that were created for the Plan
- By the filtering conditions, multiple maintenance items could be listed. Select the rows with the Items that should be part of the Maintenance Plan (these rows will be highlighted)
- Then select the check icon,
- The system will assign the Maintenance Item in the Plan. All Maintenance item information will be included in the Plan



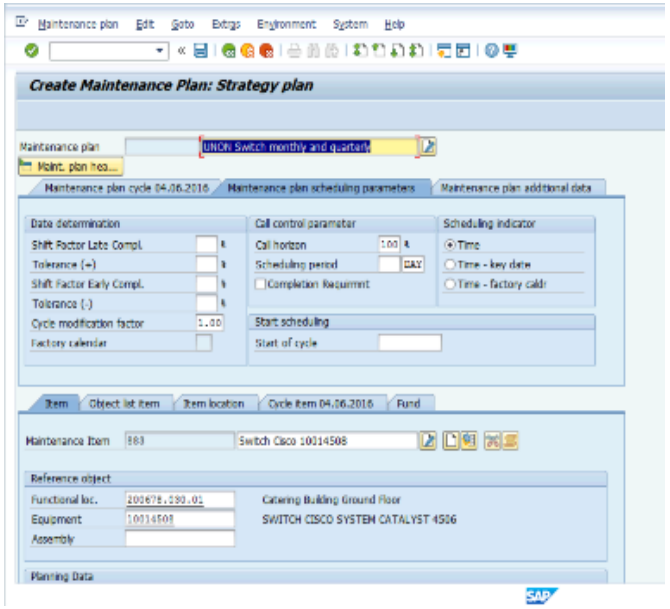
Create Maintenance Plan

Create Maintenance Item → **Create Maintenance Plan** → Update Maintenance Plan

- Enter the maintenance plan short name at the top



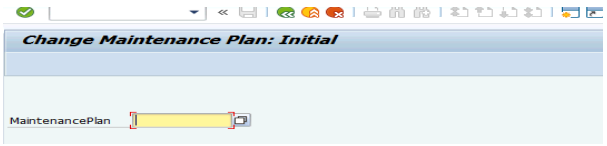
- Select the Maintenance Plan Scheduling Parameters tab
- In the Scheduling Period field, complete the information Scheduling period, which will define how long the plan will issue the orders for…. (For example one year)
- Enter the date for Start of Cycle
- Save



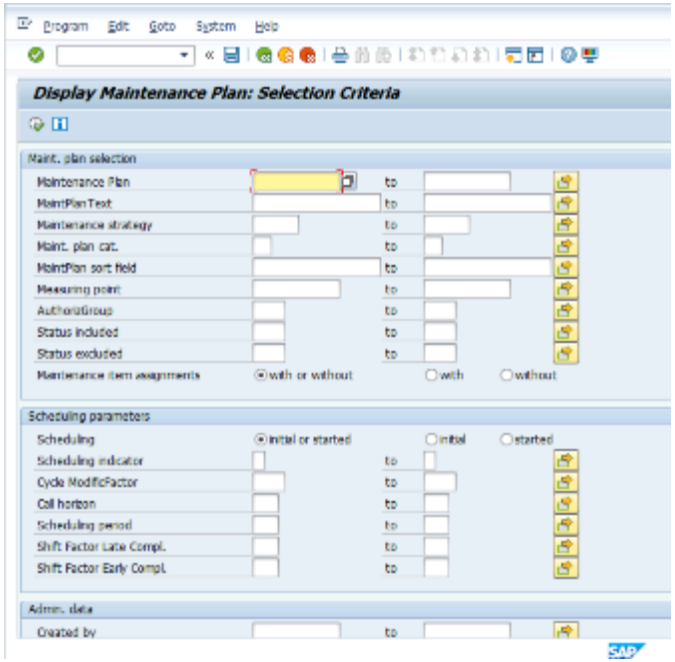
Update Maintenance Plan

Create Maintenance Item → Create Maintenance Plan → **Update Maintenance Plan**

- Use T-Code IP02



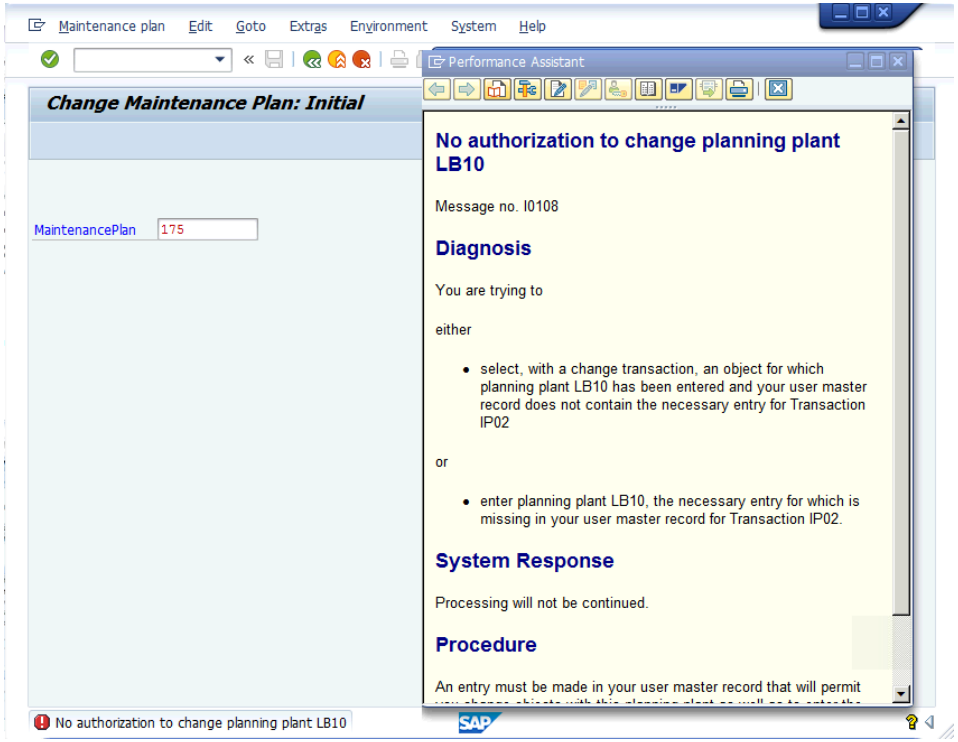
- Enter the Maintenance Plan number. In case the Planner needs to review the Maintenance Plan list and select the M. Plan from the list, please follow the instruction:
  - Select the Matchcode near the MaintenancePlan
  - Enter selection criteria in the new screen.
  - The system displays the list of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

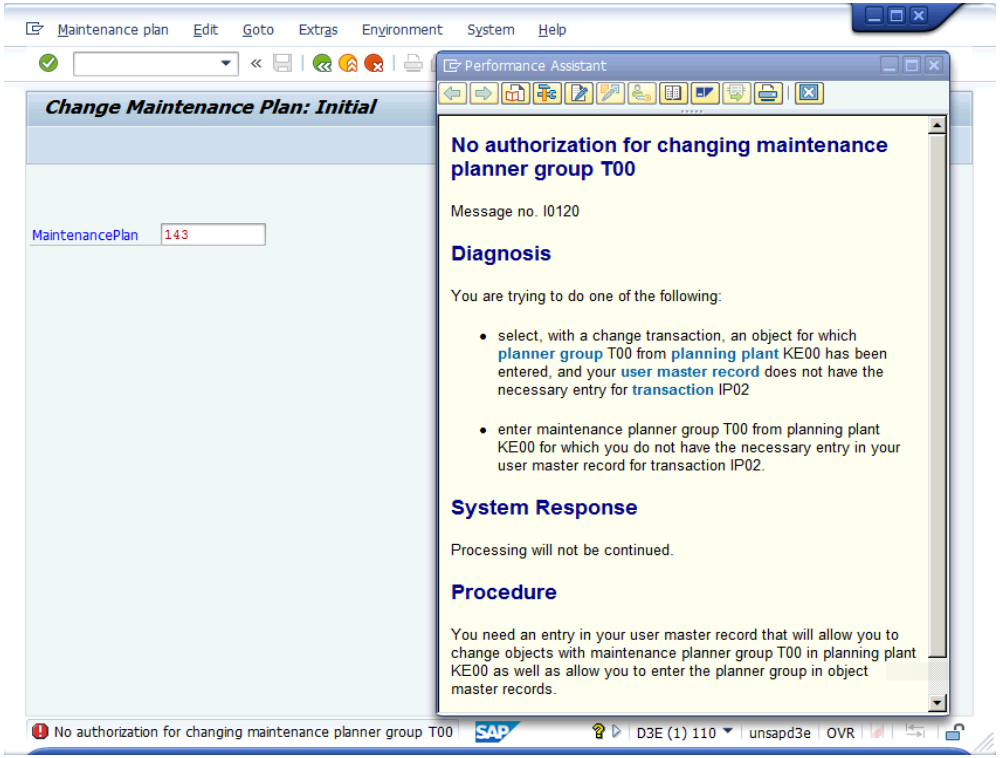
- If the PM Planner is not authorized to update the Maintenance Plan & Item in the chosen Plant the displayed error message will appear



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



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

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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.

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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

Agenda

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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
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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

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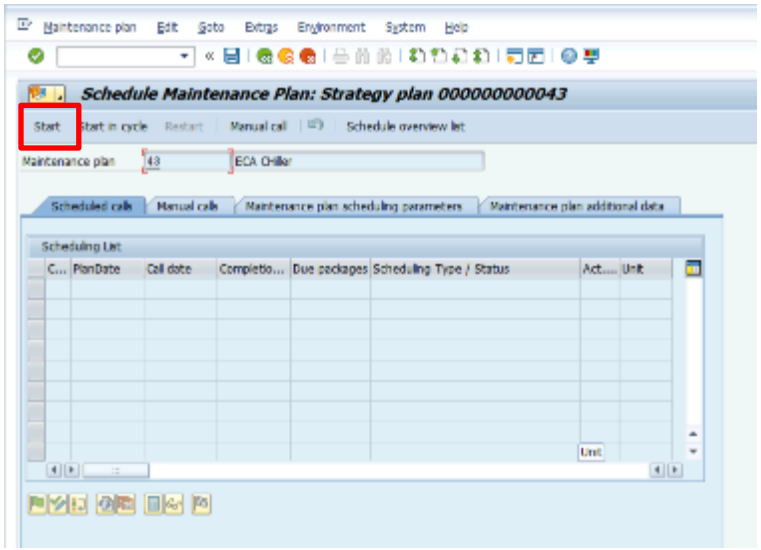
Scheduling a single plan

Scheduling a single plan → **Scheduling multiple maintenance plans**

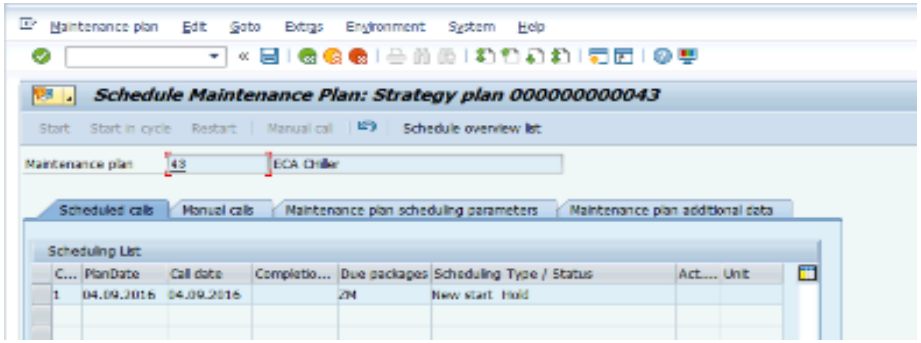
- Use transaction **IP10** to schedule a single plan
- Enter the Maintenance Plan number or using matchcode and filters which is explained
- Then select the “Start” button, the pop up will display the Start of Date created in the Maintenance Plan. The date can be updated.

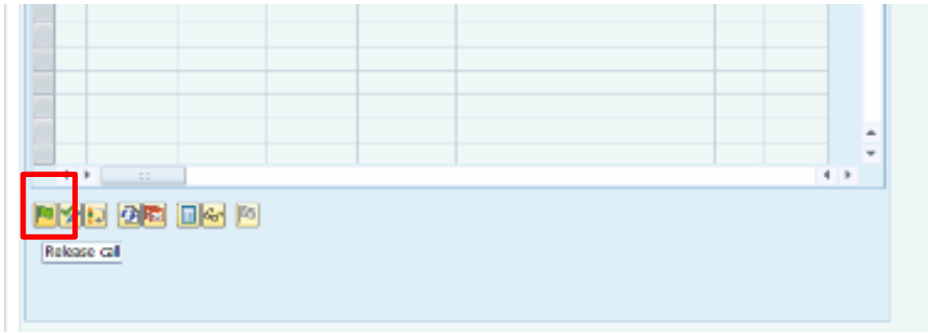


Scheduling a single plan

Scheduling a single plan → **Scheduling multiple maintenance plans**

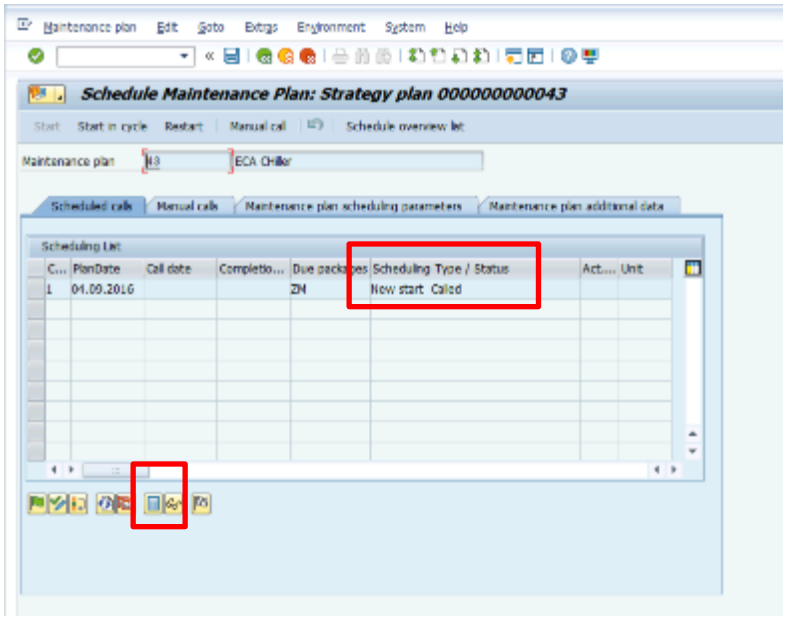
- The system will generate scheduled calls
- If the generated call (read service order) is due to be executing the status of the call will be “Save to call”
- If the date is not due, the planner can start the call early (service order) by selecting the row and clicking on the green (release) flag at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

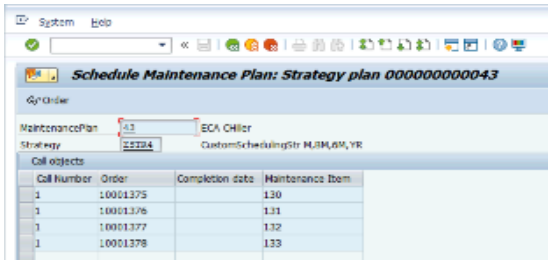




Scheduling a single plan

- When you enter he 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

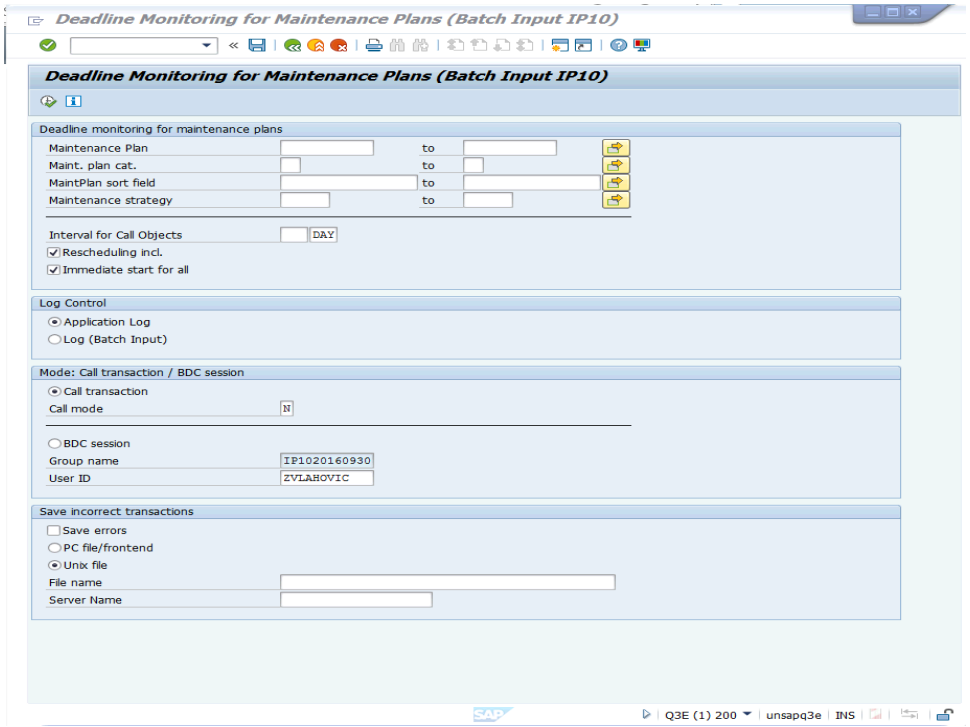




Scheduling multiple plans

Scheduling a single plan → **Scheduling multiple maintenance 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

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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

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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

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Service Order

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

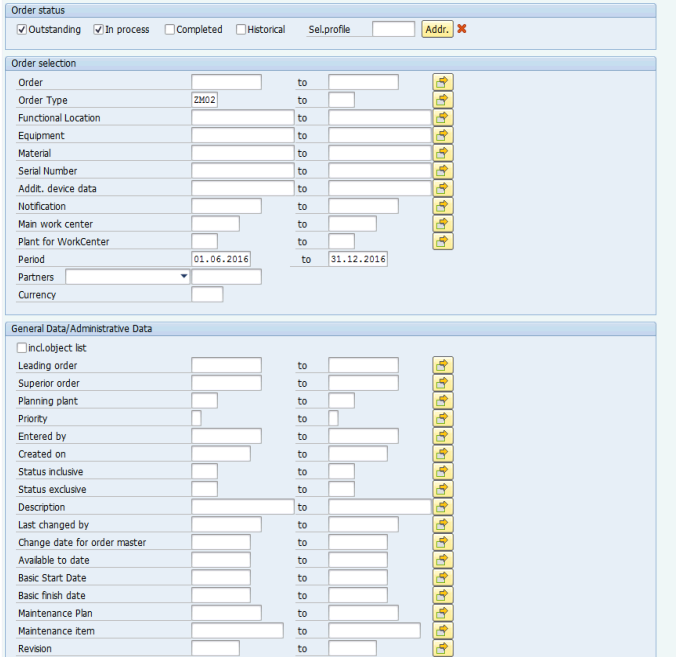
Processing a Service Order

- 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.

Update Service Order

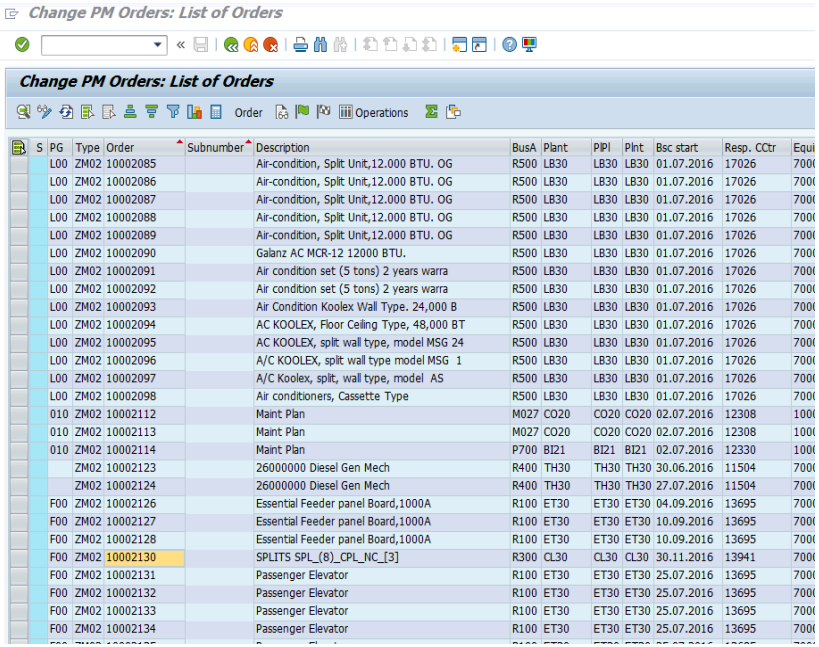
Update Service Order → Release Service Order → Print Service Order → Confirm and close service order

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



S	PG	Type	Order	Subnumber	Description	BusA	Plant	PlPl	Plnt	Bsc start	Resp. CCtr	Equi
	L00	ZM02	10002085		Air-condition, Split Unit,12.000 BTU. OG	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002086		Air-condition, Split Unit,12.000 BTU. OG	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002087		Air-condition, Split Unit,12.000 BTU. OG	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002088		Air-condition, Split Unit,12.000 BTU. OG	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002089		Air-condition, Split Unit,12.000 BTU. OG	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002090		Galanz AC MCR-12 12000 BTU.	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002091		Air condition set (5 tons) 2 years warra	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002092		Air condition set (5 tons) 2 years warra	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002093		Air Condition Koolex Wall Type. 24,000 B	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002094		AC KOOLEX, Floor Ceiling Type, 48,000 BT	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002095		AC KOOLEX, split wall type, model MSG 24	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002096		A/C KOOLEX, split wall type model MSG 1	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002097		A/C Koolex, split, wall type, model AS	R500	LB30	LB30	LB30	01.07.2016	17026	700
	L00	ZM02	10002098		Air conditioners, Cassette Type	R500	LB30	LB30	LB30	01.07.2016	17026	700
	010	ZM02	10002112		Maint Plan	M027	CO20	CO20	CO20	02.07.2016	12308	100
	010	ZM02	10002113		Maint Plan	M027	CO20	CO20	CO20	02.07.2016	12308	100
	010	ZM02	10002114		Maint Plan	P700	BI21	BI21	BI21	02.07.2016	12330	100
		ZM02	10002123		26000000 Diesel Gen Mech	R400	TH30	TH30	TH30	30.06.2016	11504	700
		ZM02	10002124		26000000 Diesel Gen Mech	R400	TH30	TH30	TH30	27.07.2016	11504	700
	F00	ZM02	10002126		Essential Feeder panel Board,1000A	R100	ET30	ET30	ET30	04.09.2016	13695	700
	F00	ZM02	10002127		Essential Feeder panel Board,1000A	R100	ET30	ET30	ET30	10.09.2016	13695	700
	F00	ZM02	10002128		Essential Feeder panel Board,1000A	R100	ET30	ET30	ET30	10.09.2016	13695	700
	F00	ZM02	10002130		SPLITS SPL_(8)_CPL_NC_[3]	R300	CL30	CL30	CL30	30.11.2016	13941	700
	F00	ZM02	10002131		Passenger Elevator	R100	ET30	ET30	ET30	25.07.2016	13695	700
	F00	ZM02	10002132		Passenger Elevator	R100	ET30	ET30	ET30	25.07.2016	13695	700
	F00	ZM02	10002133		Passenger Elevator	R100	ET30	ET30	ET30	25.07.2016	13695	700
	F00	ZM02	10002134		Passenger Elevator	R100	ET30	ET30	ET30	25.07.2016	13695	700

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Update Service Order

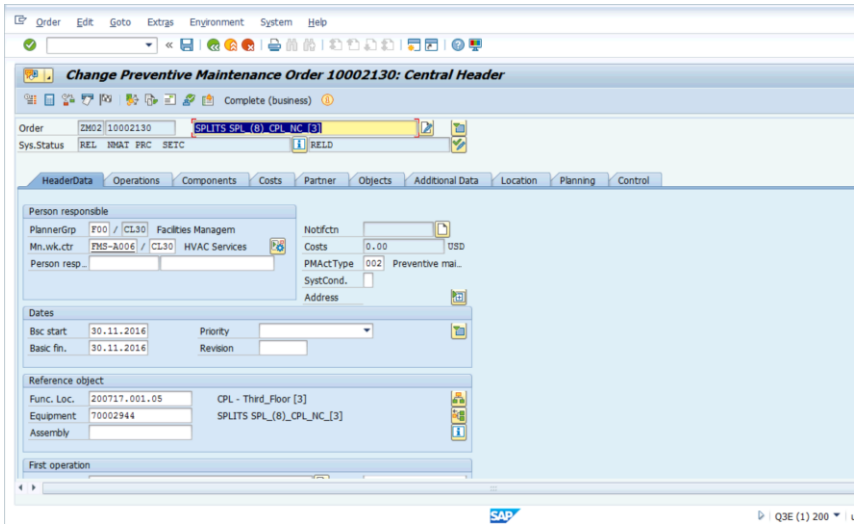
Update Service Order → Release Service Order → Print Service Order → Confirm and close service order

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)



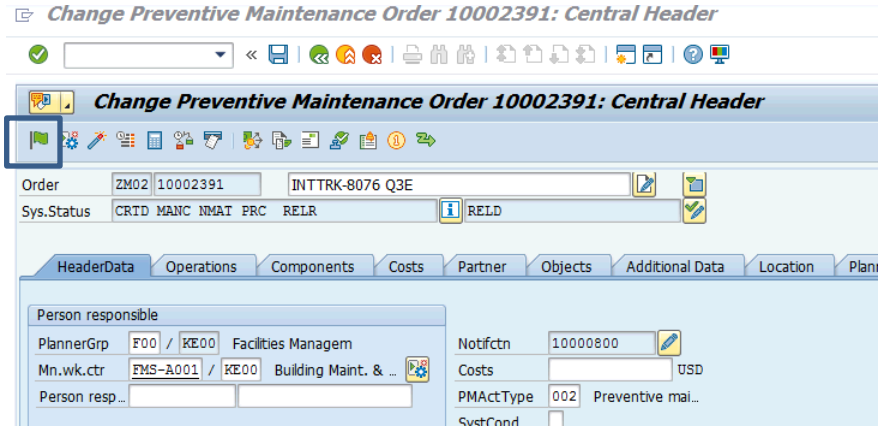
Note: **IT IS IMPORTANT THAT UNTIL FURTHER NOTICE DO NOT USE the COMPONENTS TYPE L (STOCK ITEM BUDGENT RELEVANT) OR N (NON STOCK ITEMS), ONLY USE TYPE Z (STOCK ITEMS NON BUDGET)**

Update Service Order

Update Service Order | **Release Service Order** | Print Service Order | Confirm and close service order

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

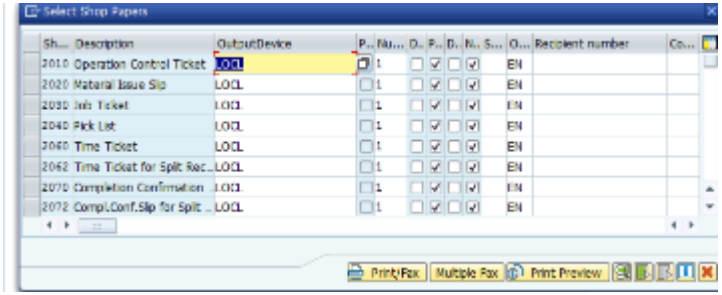


Note: There is an option to release groups of service orders by using IW38

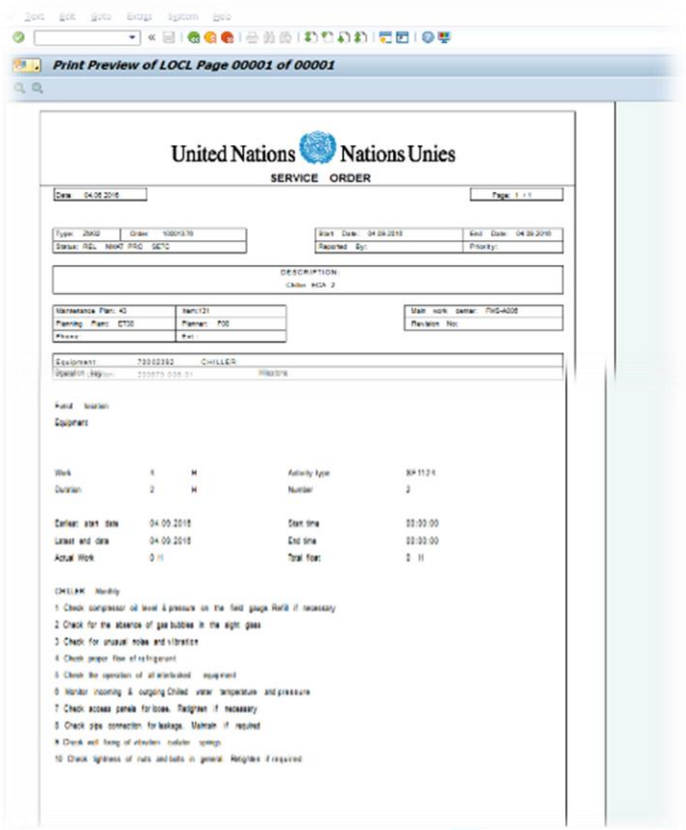
Update Service Order

Update Service Order → Release Service Order → **Print Service Order** → Confirm and close 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 >



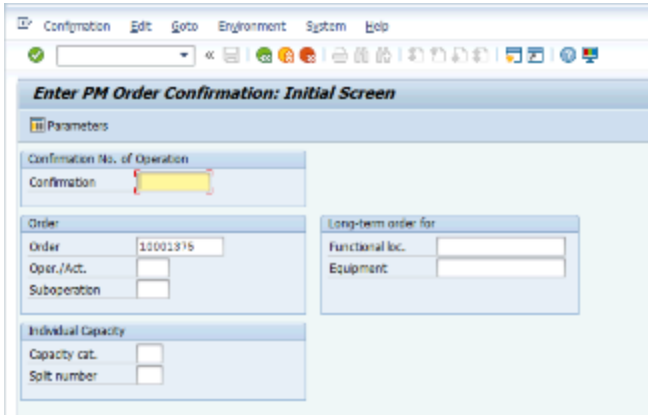
- In the pop up select Print Preview to view the order, or Print/Fax to print it
- The print out includes all the detailed operations of long text of the task list



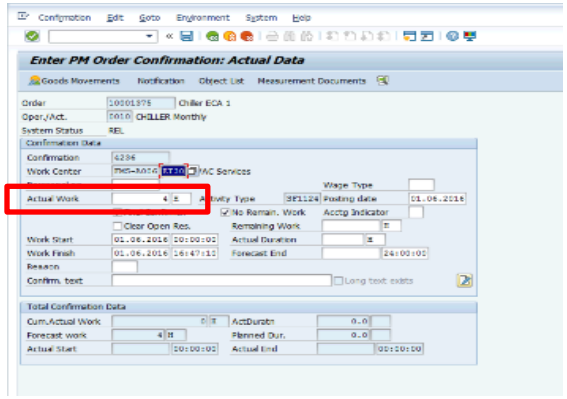
Update Service Order

Update Service Order → Release Service Order → Print Service Order → **Confirm and close 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

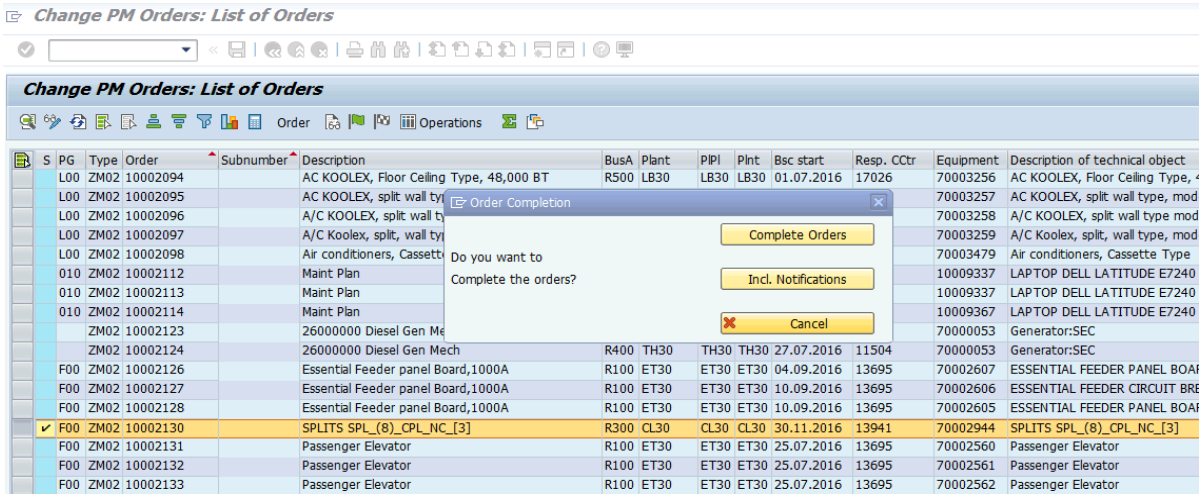


Update Service Order

Update Service Order → Release Service Order → Print Service Order → **Confirm and close service order**

- 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

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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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Preventive Maintenance Reports

These are the reports related to Preventive Maintenance:

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

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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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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

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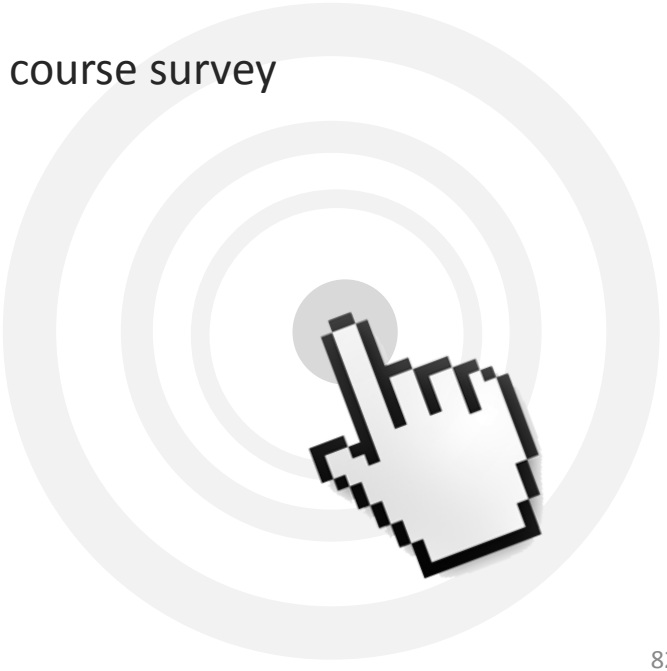
Course Survey

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



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Congratulations! You have successfully completed the *Umoja Preventive Maintenance* course.

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