



# Work Order and Inventory Enhancements

Release 5.1

# WO/Maintenance – Major Features

- **Preventive Maintenance – WO Rollup by Frequency**
- **Preventive Maintenance – Skill Report**
- **Scheduling – Assign employees**
- **Scheduling – Save schedules to spreadsheets**
- **Scheduling – Interface to Microsoft Project 2000/2002**

## PM Setup Options - Rollup Feature

**System Setup**

**Module Setup Options**

**Modules**

- Account Validation
- Document Interface
- Equipment
- Handhelds
- Inventory
- Invoice Matching
- PM**
- Purchasing

Select a module from the list and click on the Setup Options button.

**Check 'Use Rollup Feature' to make PM Rollup available for your site.**

**PM Setup Options**

**Use Rollup Feature**

If Rollup is used, the generation of less-frequent PM's will suppress the generation of more-frequent PM's. For example, if a quarterly PM is generated for a piece of equipment, the monthly PM also due will not be generated.

OK Cancel Help

## PM Schedules – Rollup Checkbox

**Set PM Schedule 34533456 - MP000554**

Equipment 34533456 PUMP, SLURRY  
Master Plan MP000554 PUMP REBUILD

By Meter  By Time  By Both

Frequency  
Time: Every 1 Timeframe Year  
--or--  
Units: Every 1000 HOURS

Lead Time to Schedule  
Time 1 Lead Timeframe Month  
--or--  
Units 10 --or-- 1 %

Schedule  
Last Execution was 10/30/2002 Units 0  
Next Execution is 10/30/2003 --or-- 5000

Supervisor BCUR2025 Change  
Shop 00-WYND-ME Delete

PM Options  
 Base Schedule on Work Completion  
 On Hold  
 Generate PM Regardless of Rollup

## PM Generation – Rollup Feature

- **When more than one PM is due for the same equipment, a work order is generated for the least-frequent PM. For example, if the annual, semi-annual, quarterly and monthly are all due, a work order is generated for the annual PM Schedule. The Next Execution Date is incremented for all four PM Schedules.**
- **Any PM Schedule with ‘Generate PM Regardless of Rollup’ checked ON will generate when due, regardless of the new rollup feature.**
- **Rollup based on frequency works for meter-based schedules in the same way as calendar-based schedules. If a PM Schedule is based on both calendar and meter – e.g., ‘every 3 months or 3000 miles’, the rollup will be based on the calendar frequency.**

## PM Generation – Work Order Rollup

- **To use this feature, you will need to revise the Master Plans' planned resources, materials and instructions.**
- **Using the example above: Because only the annual PM will be generated, the work order plan for the semi-annual, quarterly and monthly PM's will have to be added to the annual PM. The plan on the semi-annual and quarterly PM's will have to be similarly updated.**

## PM Generation – Work Order Rollup

The screenshot shows the 'PM Schedule Search' window with the following data in the table:

| Plant              | Equipment | Master Plan | Last Execution Date | Next Execution Date | Frequency | Frequency Timeframe |
|--------------------|-----------|-------------|---------------------|---------------------|-----------|---------------------|
| <b>Plant : ROF</b> |           |             |                     |                     |           |                     |
| ROF                | jackey    | jw712c      | 7/27/2002           | 1/10/2004           | 6 Month   |                     |
| ROF                | jackey    | jw719MP     | 7/29/2002           | 1/31/2004           | 2 Month   |                     |
| ROF                | jackey    | jw722MP     | 7/27/2002           | 2/14/2004           | 1 Month   |                     |
| ROF                | jackey    | jw723MP     |                     |                     |           |                     |
| ROF                | jackey    | jw723MP2    |                     |                     |           |                     |
| ROF                | jackey    | jw725MP     |                     |                     |           |                     |
| ROF                | jackey    | jwMASTER    |                     |                     |           |                     |
| ROF                | jackeynew | jwMASTER    |                     |                     |           |                     |
| ROF                | jackeyold | 00057       |                     |                     |           |                     |

Overlaid on the table is a message dialog box titled 'Message:PMRollupPMs' with the following text:

**Because these schedules are part of a PM Rollup, Next Execution Date/Reading will not be updated. Use the Set PM Schedule window to update Next Execution - BOTH for the PM being generated AND for the more-frequent PMs defined for the equipment.**

The dialog box has 'Ok' and 'Cancel' buttons.

This message is displayed when using the 'Create PM Work Order' button to generate a PM that is part of a rollup structure.

## PM Schedules – Placing a PM on Hold

**Set PM Schedule 34533456 - MP000554**

Equipment: 34533456 PUMP, SLURRY  
Master Plan: MP000554 PUMP REBUILD

By Meter  By Time  By Both

**Current Readings**  
Units: 4980.00  
Date: 9/15/2003

**Work Order Values**  
Planner: TRAIN11  
Supervisor: BCUR2025  
Shop: 00-WYND-ME

**PM Options**  
 Base Schedule on Work Completion  
 **On Hold**  
 Generate PM Regardless of Rollup

**Schedule**  
Last Execution was: 10/30/2002  
Next Execution is: 10/30/2003 --or-- 5000 Units

Buttons: OK, Cancel, Change, Delete

**PM Schedules marked as 'on hold' are bypassed by JobCop's PM Generation routine. Also, note that the Current Meter Reading is now displayed.**



## PM – PM Skill Report for Labor Leveling

PM Skill Report Criteria

Area

Equipment Class

Department

Skill

Equipment

? Help  OK  Cancel

The PM Skill Report is used to balance PM labor requirements over the coming year.

Select PM Schedules based on Area, Department, Skill/Resource, Equipment Class or Partial Equipment Number.

## PM – PM Skill Report Detail View

| PM Skill Report                        |      |                  |  |   |   |   |   |   |           |    |    |    |    |    |    |
|--|------|------------------|--|---|---|---|---|---|-----------|----|----|----|----|----|----|
| <b>Equipment</b> 110 PUMP              |      |                  |  |   |   |   |   |   |           |    |    |    |    |    |    |
| <b>Master Plan</b>                     |      | <b>Frequency</b> |  |   |   |   |   |   |           |    |    |    |    |    |    |
| MP000514                               |      | 3 Month          |  | 1 | 2 | 3 | 4 | 5 | <u>38</u> | 39 | 40 | 41 | 42 | 43 | 44 |
|  | ELEC |                  |  |   |   |   | 1 |   |           |    |    |    |    | 1  |    |
|  | Mech |                  |  |   |   | 3 |   |   |           |    |    |    |    | 3  |    |
| <b>Equipment</b> 20-1330-01 Debarker 2 |      |                  |  |   |   |   |   |   |           |    |    |    |    |    |    |
| <b>Master Plan</b>                     |      | <b>Frequency</b> |  |   |   |   |   |   |           |    |    |    |    |    |    |
| MP000563                               |      | 1 Week           |  | 1 | 2 | 3 | 4 | 5 | <u>38</u> | 39 | 40 | 41 | 42 | 43 | 44 |
|  | Mech |                  |  | 1 | 1 | 1 | 1 | 1 |           | 1  | 1  | 1  | 1  | 1  | 1  |
| <b>Equipment</b> 34533456 PUMP, SLURRY |      |                  |  |   |   |   |   |   |           |    |    |    |    |    |    |
| <b>Master Plan</b>                     |      | <b>Frequency</b> |  |   |   |   |   |   |           |    |    |    |    |    |    |
| MP000554                               |      | 1 Year           |  | 1 | 2 | 3 | 4 | 5 | <u>38</u> | 39 | 40 | 41 | 42 | 43 | 44 |
|  | 0022 |                  |  |   |   |   |   |   |           |    | 1  |    |    |    |    |

- Planned labor hours are projected over the next 53 weeks.
- Meter-based PM's and PM's 'on hold' are not included.
- Double-click line to update a PM Schedule and then Refresh.

## PM – PM Skill Report Summary View

| Resource Id         | <u>38</u> | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 |
|---------------------|-----------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| 0022                |           |    | 1  |    |    |    |    |    |    |    |    |    |    |    |    |    |
| ELEC                |           |    |    |    |    | 1  |    |    |    |    |    |    |    |    |    |    |
| HVAC                |           | 4  |    |    |    |    | 4  |    |    |    | 4  |    |    |    |    | 4  |
| Mech                |           | 1  | 4  | 1  | 1  | 4  | 1  | 1  | 1  | 1  | 1  | 1  | 1  | 1  | 1  | 1  |
| TEC                 |           |    |    | 8  |    |    |    |    |    |    |    |    |    |    |    |    |
| <b>Grand Total:</b> |           | 5  | 5  | 9  | 1  | 5  | 5  | 1  | 1  | 1  | 5  | 1  | 1  | 1  | 1  | 5  |

- The Summary View totals labor requirements by Resource.
- Check the Summary View first; if problems exist, check the Detail View and adjust schedules as needed.
- Summary and Detail views can be printed.

# Scheduling – Assigning Employees

**Work Order Schedule**

Schedule Category: Other:BC-Weekly 1/31/00      Timeframe: Weekly      Actions ...      OK      Cancel

| Description                      | Schedule Start Date | Schedule Start Time | Area      | Employee 1        | Employee 2   | Employee 3 | Employee 4 | Employee 5 |
|----------------------------------|---------------------|---------------------|-----------|-------------------|--------------|------------|------------|------------|
| QUARTERLY PM MASTER PLAN - REF6A | 9/25/2002           |                     | SRU2      | snyder, butch     | ? R HYATT JR | ?          | ?          | ?          |
| Repair Pump                      | 9/25/2002           |                     | SRU2      | SATTERFIELD, LOL  | ?            | ?          | ?          | ?          |
| need to be warm                  | 9/25/2002           |                     | Bldg2-1   | SCOTT, MARVIN E.  | ?            | ?          |            |            |
| rectify speed control error      | 9/26/2002           |                     | SRU2      | SCOTT, MARVIN E.  | ? COX, JERRY | ?          |            |            |
| REPAIR FAN MOTOR                 | 9/26/2002           |                     | Building1 | SPENCER, KEITH W. | ?            | ?          |            |            |
| valve at inlet needs replacing   | 9/27/2002           |                     | SRU2      |                   | ?            | ?          |            |            |
| Repair Pump                      | 9/27/2002           |                     | SRU2      |                   | ?            | ?          |            |            |
| Repair Pump                      | 9/28/2002           |                     | SRU2      |                   | ?            | ?          |            |            |

Move      Delete

**Assign up to 6 employee ID's to a work order.**

# Scheduling – Assigning Employees

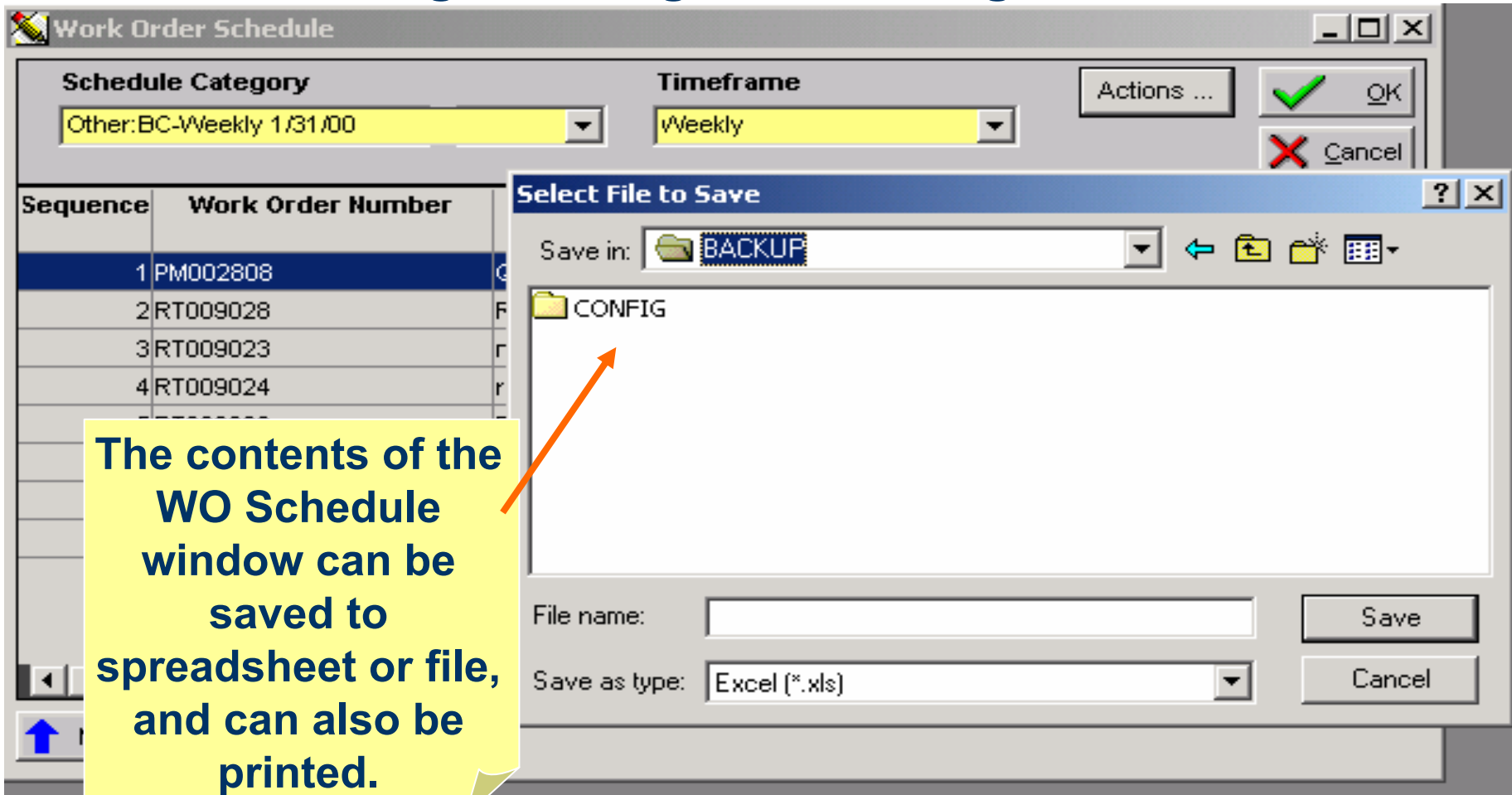
The screenshot shows the 'Work Order Schedule by Date' application. At the top, there are dropdown menus for 'Schedule Category' (set to 'Other:BC-Weekly 1/31/00') and 'Timeframe' (set to 'Weekly'). Below these is a table with columns: 'Description', 'Schedule Start Date', 'Schedule Start Time', and 'Area'. The table contains several rows of work order data. A context menu is open over the table, listing options such as 'Cut', 'Copy', 'Paste', 'Clear', 'Select All', 'Update WO Assign To', 'Clear WO Assigned To value', 'Filter WO's Showing All Rows Where Employee Exists', and 'Clear WO Filter'. The 'Update WO Assign To' option is highlighted with an orange arrow. To the right of the table, there are columns for employee names, with 'Employee 4' visible at the top. A yellow callout box with a blue border is overlaid on the bottom left of the table area.

**Right-click on Employee to update Work Order's Assign To or to Filter work orders based on the Employee.**

# Scheduling – Assigning Employees

**WO Schedule By Date**  
report shows the  
assigned employees,  
based on 'Show  
Resources/Employees'  
checkbox in upper left.

## Scheduling – Saving and Printing Schedules



**Work Order Schedule**

Schedule Category: Other:BC-Weekly 1/31/00  
Timeframe: Weekly

Actions ... OK Cancel

| Sequence | Work Order Number |
|----------|-------------------|
| 1        | PM002808          |
| 2        | RT009028          |
| 3        | RT009023          |
| 4        | RT009024          |

**Select File to Save**

Save in: BACKUP

CONFIG

File name:

Save as type: Excel (\*.xls)

Save Cancel

The contents of the WO Schedule window can be saved to spreadsheet or file, and can also be printed.

# Scheduling – Displaying Scheduled Date/Time

**Work Order: PM002808**

**WO Description** QUARTERLY PM MASTER PLAN - REF6A

**Equipment** 95P-20A K.O. Drum Pump Acid Gas

**Master Plan** MP000010

**Safety Procedures / Permits**

- Need Roof Rights - NO
- Need Roof Rights - YES

**STA CHECKLIST**

- Emergency / Rescue Equip?
- Hazard Briefing REQUIRED?
- MSDS Review REQUIRED?

**STA CHECKLIST**

- Safety Dept REQUIRED?

**Scheduled Start** 9/25/2003 13:00

**ISO 9000** FD

**Mechanical Integrity** Pump

Work Order  OK

Desc/Permits  Cancel

Custom

Planning

Documents

Costs  New

Actions

The Scheduled Start Date and Time are displayed on the Work Order Notebook and also on Work Order Search.



# Scheduling – Interface to Microsoft Project

**Define Schedule**

Schedule Category: Other:BC-Weekly 1/31/00

Timeframe: Weekly

Schedule Type: Weekly

Draft Schedule:

Work Hours Per Day: 8.00

| Resource | Available Hours |
|----------|-----------------|
| ELEC     | 25.00           |
| Mech     | 40.00           |
|          | 0.00            |
|          | 0.00            |
|          | 0.00            |
|          | 0.00            |

**Microsoft Project Interface Setup**

MS Project Database:

- Current
- MS Access

Access File: [Empty Field]

Connect

The interface works with MS Project 2000 or 2002. Already available for TabWare On Line.

# Security Access for MS Project Interface

**Define Window Access**

| Plant | Group           |
|-------|-----------------|
| &1    | All Access      |
| 1     | AllAccess       |
| B3    | B3-AllAccess    |
| CSR   | All Access      |
| DF0   | 1 Carrier       |
| DF0   | All Multi-Plant |

| Module                 | Has Access |
|------------------------|------------|
| Security               | Yes        |
| Setup                  | Yes        |
| Shipping Orders        | Yes        |
| Template Planning      | Yes        |
| WO Schedule Interfaces | Yes        |
| Work Order             | Yes        |

| Window Description                  | Action                    | Has Access                          | Window Name             |
|-------------------------------------|---------------------------|-------------------------------------|-------------------------|
| Microsoft Project Interface Execute | Execute                   | <input checked="" type="checkbox"/> | w_mpi_execute_interface |
| Microsoft Project Interface Setup   | Current Database          | <input checked="" type="checkbox"/> | w_mpi_interface_setup   |
|                                     | Microsoft Access Database | <input checked="" type="checkbox"/> | w_mpi_interface_setup   |
| Primavera Interface Options         | Inquiry                   | <input checked="" type="checkbox"/> | w_pr_schedule_options   |
|                                     | Update                    | <input checked="" type="checkbox"/> | w_pr_schedule_options   |
| TabWare - P3/SureTrak Interface     | Update                    | <input checked="" type="checkbox"/> | w_pr_schedule_execution |

Note the two window actions for MS Project Interface Setup.

## Interface to MS Project

- On TOL users, projects are stored in a local Microsoft Access database - not in the TabWare On-Line database. These software components must be installed on the local PC:
  - Microsoft Project 2000 or 2002
  - Microsoft Access 2000 or Microsoft Access ODBC Driver
  - TabWare Online Extended Client
- For TOS, projects are stored in the TabWare database.
- For TOS installations - if the customer prefers that projects be kept outside of the TabWare database, then users can follow the instructions for TabWare On-Line users. Users will need Microsoft Access 2000, or the Microsoft Access ODBC Driver

# Additional 5.1 Enhancements to the Work Order and Equipment Modules

## WO Enhancements – Inactive Employee Flag

**Employee DROSSELOT**

|                     |                                     |            |                                     |
|---------------------|-------------------------------------|------------|-------------------------------------|
| Employee Id         | DROSSELOT                           | Name       | Don Rosselot                        |
| Employee Number     | 567575                              | Hire Date  | 9/4/2002                            |
| Employee Supervisor | Brad Smith                          | Department | 653                                 |
| Location            |                                     | Shift      | 1                                   |
| Occupation          |                                     | Pay Code   |                                     |
| Contractor          | <input checked="" type="checkbox"/> | Active     | <input checked="" type="checkbox"/> |

Comments

**Time charges cannot be entered for employees flagged as Inactive.**

**Employee**

- Contacts
- Resources
- Approvals
- Roles
- Training
- Custom
- Documents

OK Cancel

New Delete

## WO Enhancements – Primary Resource Flag

Employee DROSSELOT

| Resource (Skill) | Resource Rate | Certification Date | Expiration Date | Primary                             |
|------------------|---------------|--------------------|-----------------|-------------------------------------|
| Mech             | \$18.000      | 8/5/2003           | 8/4/2005        | <input type="checkbox"/>            |
| MILW             | \$13.500      | 8/1/2003           | 7/31/2005       | <input checked="" type="checkbox"/> |
| MTR              | \$15.000      |                    |                 | <input type="checkbox"/>            |

You can flag one resource code as 'Primary' for an employee. That resource code will default onto Worker Time Reporting.

Employee  
Contacts  
**Resources**  
Approvals  
Roles  
Training  
Custom  
Documents

New  
Delete

New  
Delete

# WO Enhancements – Active Resource Flag

**Validation Codes Valid Values**

**Validation Codes**

- Purchase Order Type
- Purchasing Activities
- Purchasing Addresses
- Rate Multiplier
- Reason Out Of Bin
- Requisitioning Activities
- Resource

X Cancel  
+ New

**Valid Resource Values**

| Code       | Description               | Avg Rate | Active                              |
|------------|---------------------------|----------|-------------------------------------|
| CARP       | CARPENTER                 | \$13.500 | <input checked="" type="checkbox"/> |
| COMP       | COMPUTER TECHNICIAN       | \$12.750 | <input checked="" type="checkbox"/> |
| CR-Elec    | Carrier Elec              | \$21.000 | <input checked="" type="checkbox"/> |
| CR-Mech    | Carrier Mech              | \$20.000 | <input checked="" type="checkbox"/> |
| CST        | CASTROL SERVICE TECH      | \$15.000 | <input checked="" type="checkbox"/> |
| CSX-Elec   | CSX Electrician           | \$17.000 | <input checked="" type="checkbox"/> |
| CSX-Mech   | CSX Mechanic              | \$15.000 | <input checked="" type="checkbox"/> |
| E.HELP     | ELECTRICIANS HELPER       | \$8.800  | <input checked="" type="checkbox"/> |
| EL01 Groth | Electrician 01 Bill Groth | \$12.000 | <input checked="" type="checkbox"/> |

**Inactive Resources will not appear in drop-downs used for WO Planning, Time Charge and Scheduling.**

# WO Enhancements – New Labor Activity Data

**Labor Activity Search**

Employee  ? Query **Basic** Search Change Close

Work Order  ?  Startup Query

| Plant | Transaction Date | Transaction Time | Work Order # | Employee Id | Labor Activity Account | Employee Supervisor |
|-------|------------------|------------------|--------------|-------------|------------------------|---------------------|
| DF0   | 4/3/2003         | 11:44:39:312     | RT009706     | TRAINS      |                        |                     |
|       | 5/27/2003        | 10:08:19:956     | RT009708     | BCUR2025    |                        |                     |
|       | 6/23/2003        | 16:43:43:270     | RT009709     | BCUR2025    |                        |                     |
|       | 6/24/2003        | 16:27:54:332     | RT009710     | BCUR2025    |                        |                     |
|       | 9/12/2003        | 12:07:28:342     | RT009669     | TRAIN2      | R008-602-5010          | BEDEMO10            |
|       |                  |                  |              | TRAINS      | Other-20               |                     |
|       |                  |                  |              | TRAIN6      |                        | 001                 |
|       |                  |                  |              | TRAIN6      | 000-CPC-Int123         | 001                 |
|       |                  |                  |              | TRAIN6      | 000-CPC-Int123         | 001                 |

Time Reporting

**Labor Activity Account: WO Account at the moment that time was charged. Also, Employee Number, Employee Supervisor, Location, Occupation, Shift, Pay Code can be displayed.**



# WO Enhancements - Print Open WO's for Equipment

**Equipment Hierarchy : 95P**

- 95P Pumping System
  - 95P-20A K.O. Drum Pump Acid Gas
  - 95P-20B K.O. Drum Pump Acid Gas

| Work Order     | Status               | Description  |
|----------------|----------------------|--------------|
| <b>95P-20A</b> |                      |              |
| RT009626       | 20- In Planning      | Repair Pump  |
| RT009641       | 60-Ready to Work     | Repair Pump  |
| RT009655       | 50-Reserve Material  | Training wor |
| RT009662       | 50-Reserve Material  | Repair drum  |
| <b>95P-20B</b> |                      |              |
| EM000034       | 60-Ready to Work     | check vibrat |
| EM000035       | 60-Ready to Work     | take reading |
| EM00053        | 60-Ready to Work     | Repair Pump  |
| PM006838       | 50-Reserve Material  | Change wat   |
| RT009617       | 0-Work Order Enterec | Repair Pump  |
| RT009618       | 20- In Planning      | Repair Pump  |
| RT009627       | 20- In Planning      | Repair Pump  |

Buttons: OK, Cancel, Print, Actions ...

**Displays open work orders for highlighted equipment and child equipment. This screen can now be printed.**

## WO Enhancements – Event Notebook and Search

Event: RT000922

|                               |   |                                      |
|-------------------------------|---|--------------------------------------|
| <b>Work Order</b><br>RT000922 | <b>Description</b><br>WATER FOUNTAINS, C203, FILTERS, JOHN O'QU |                                      |
| <b>Equipment</b><br>WC203     | <b>Description</b><br>WATER COOLERS CENTRE TWO 3RD FLOOR        |                                      |
| <b>Event Type</b><br>Routine  | <b>Event Status</b><br>Closed                                   | <b>Employee ID</b><br>[Yellow Box] ? |

|   |  |
|---|--|
| <b>Failure</b> <input type="checkbox"/> | <b>Start Date-Time</b> 1/21/1997 10:53   |
| <b>Lost Production</b> 0                | <b>End Date-Time</b> 1/27/1997 11:15     |
| <b>Production UOM</b>                   | <b>Duration Hours</b> 144 <b>Min.</b> 22 |

**FollowUp Required**

Event  OK

Remarks  Cancel

Analysis Codes

Custom

Documents **Go To Work Order Notebook**

Costs

Readings

New

Delete

- Go directly from Event Notebook to Work Order Notebook.
- Display Master Plan Number on Event Search, to see how many of the corresponding PM WO's generated a follow-up.

## WO Enhancements - Printing WO Documents

The screenshot shows a window titled "Document Interface Control" with a standard Windows-style title bar. Below the title bar, there is a checked checkbox labeled "Print Documents with Work Order". To the right of this checkbox are "Cancel" and "OK" buttons. Below the checkbox are two tabs: "TabWare Standard Links" and "Spicer Print Options". The "Spicer Print Options" tab is active and contains a sub-section titled "Spicer Print Options" with the following settings:

- Maximum Pages to Print Per Document: 10
- Print Page Number on Header:
- Print File Path on Header:
- Print Work Order Number on Header:

A yellow callout box on the right side of the window contains the text: "This window in Setup allows you to configure the add-on software used to print Work Order documents."

# WO Enhancements - Change to WO Completion Edit

**Define Item Types**

Item Type: ServiceC

Description: ServiceC

Item Type Options:
 

- Permanent
- Temporary
- No Item Created

Work Order Planned Cost To Update: Services

Work Order Actual Cost To Update: Services-C

Tolerance Percent for Over Receipt: 0.00%

Order Method (New Item Default):

Options:

- Do Not Flag Shortages-Consider as Available
- Allow WO Completion regardless of open purchases
- Allow Maintenance Technician To Request Item
- Do Not Allow Additional Purchase-Item now obsolete
- Allow Entry Of Purchase Description on Requisition
- Allow Entry Of Unit Cost on WO/Charge-to-Account Req
- At Receipt, Add to Qty in Receiving (New Item Default)
- Automatic Issue Upon Receipt
- Allow Service Contract Charges
- Automatic Approval For Purchase on WO/Charge-to-Account Req
- Print On Picklist
- Select For Cycle Count

Buttons: OK, Cancel

**New Item Type option 'Allow WO Completion regardless of open purchases' - use when receipt/payment is delayed.**

## Additional Enhancements - Requisitioning

- You can now prevent specific Item Types from being requested on various types of requisitions. For example, you may want to prevent the requisitioning of Nonstocks or Services on Charge-to-Account requisitions. Three checkboxes have been added to the Define Item Types window:
  - Do not allow on Charge-to-Account Requisition
  - Do not allow on Manual Order Requisition
  - Do not allow on Work Order Requisition
- Supplier Name has been added to Requisition Print.

## Additional Enhancements - Inventory

- **Supplier Name has been added to Stores Activity Search and Requisition Search.**
- **Shipping Order Search can be sorted and grouped by Supplier Name.**
- **Stores Activity Search includes transactions for services and general items, where there is no corresponding item record or item description. For such transactions, Stores Activity Search will now show the item description from the PO line.**
- **Buyer Code is displayed on the PO Receipts window.**
- **When creating a new item by copying an existing item, the Rank #1 Supplier is now copied. All data is copied other than Last Price Paid and Current Price.**

# Repairables - Tracks Qty Not Returned for Repair

Item: 0000G0201-3066

| Item Description          |   | Requirements |   |
|---------------------------|---|--------------|---|
| MOTOR, AC SERVO           |   | Planned      | 0 |
| On Hand                   | 3 | Required     | 0 |
| For Purchase - Unapproved | 0 | Reserved     | 0 |
| For Purchase - Approved   | 0 | Available    | 3 |
| On Purchase Order         | 0 |              |   |
| Not Returned For Repair   | 1 |              |   |
| Qty Awaiting Repair       | 0 |              |   |
| Qty Being Repaired        | 0 |              |   |

Item: [OK] [Cancel]

Custom

Documents

Suppliers

Replenish

Quantities

Quantity Dates

**Not Returned for Repair – tracks repairables between the time the new item is issued from stores and the time the broken item is returned for repair; part of the reorder calculation.**

# Repairables - Repair Req Approver Flag

Employee 3300002

### Approvals

|                 |  |                |         |
|-----------------|--|----------------|---------|
| Requisition     | Reviewer <input type="checkbox"/>            | Approval Limit | \$0.000 |
| Reorder         | Approver <input type="checkbox"/>            |                |         |
| Repair Approver | Approver <input checked="" type="checkbox"/> |                |         |
| Shipping Order  | Approver <input type="checkbox"/>            |                |         |
| Invoice         | Approver <input type="checkbox"/>            | Direct Charge  |         |
|                 |  | Approval Limit |         |

Default Reviewers

Requisition

Repair Requisition

Employee | Contacts | Resources | **Approvals** | Roles | Training

OK | Cancel

The new Repair Approver checkbox allows for separation of duties between approving reorders and approving outside repairs.



# Repairables – Update WO Status at Restock/Scrap

**Repair Tracking Setup**

Use Repairables Tracking       Automatically Approve Repair Requisition

| Repair Equipment Location | Work Order Actual Costs to Update | Status After Restock | Status After Scrap  |
|---------------------------|-----------------------------------|----------------------|---------------------|
| REPAIR                    | Other-I                           | 70-WO Completion     | 79-Closed to Charge |

Accounting    Numbering    Invoice Variance

**Accounting Setup**

Create credit memo at time of restock  
 Create credit memo at time of issue  
 No Credit Memo

Hold:   
 Inventor:

**Restock At**

Repair Value  
 Issue Value

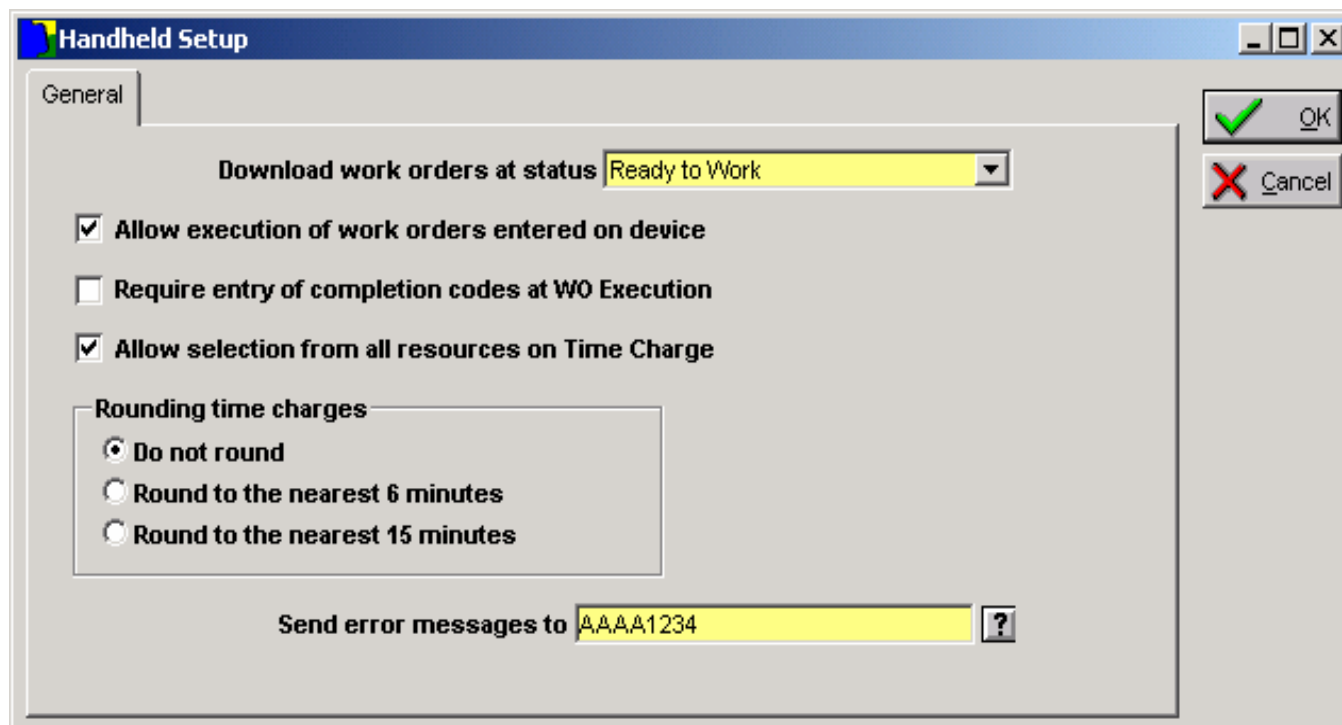
Area:   
 Department:

Percent of Issue Value:  Restock%  
 No Value, available to set at item level

OK Cancel

**Repair Tracking Setup - Work Order Status can be automatically updated at time of Restock and at time of Scrap.**

## Setup Options for Mobile Maintenance Application



**This window appears in Security regardless of whether the customer has purchased MMM.**

## User Setup – Plant Code for Handhelds

**User Setup**

Change Login Password

Colors OK Cancel

Warn if Duplicate Window Opened

Language American English

**Messages**

Enable Message Notification Within TabWare

Check Messages Every 1 Minutes

Send My Messages Via E-Mail

Delete Information/User Messages After 99 Days

When Entering Requisition Lines, Copy Data From Previous Line

Label Printer VH04VLN17 CS

Plant Code for Hand Helds DF0

On TabWare's User Setup window, each handheld user identifies their plant code for running the handheld applications of MIM and MMM.

## Additional Enhancements - Purchasing Interface

- **When the Purchasing system cancels a TabWare requisition line (the Xorc transaction), the following will now happen:**
  - **the Ready for Review checkbox and the Next Reviewer on the requisition line will be cleared.**
  - **a message will be sent to the requisitioner telling the user that the requisition line has been rejected and needs to be updated and re-submitted for approval.**

## Additional Enhancements - General

- **Release 5.1 is compatible with Oracle9i.**
- **We have added a date/timestamp to 8 tables containing master file data for Suppliers, Items and Equipment. The timestamp can be used when writing interfaces, to determine which rows need to be passed to another system, instead of passing all rows.**
- **TabWare contains three Rename programs, for renaming Items, Equipment and Suppliers. The Security setting for the Rename program has been split into three settings – so, for example, you can give a user access to Item Rename but not to Equipment Rename.**