Work Order and Inventory Enhancements

Release 5.1
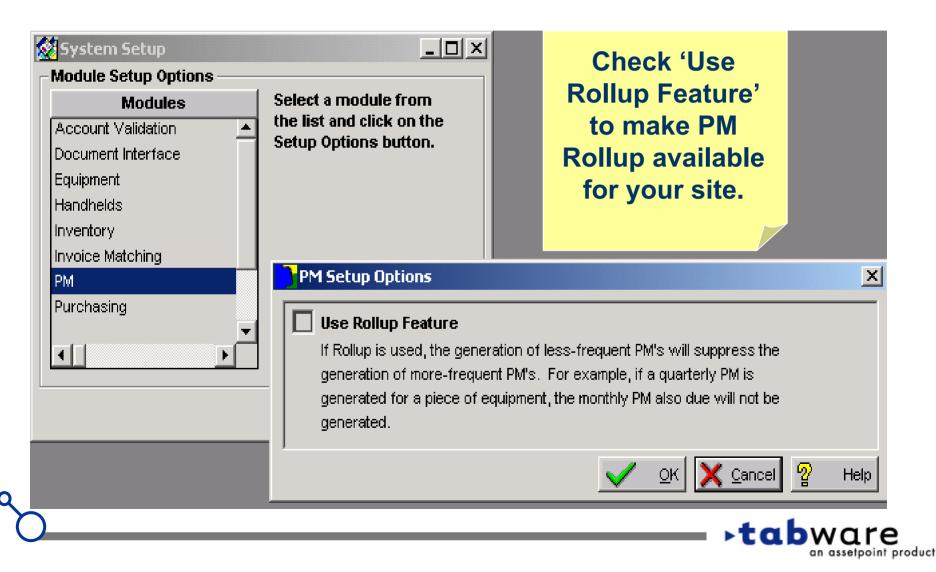
WO/Maintenance – Major Features

- **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

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

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.

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

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PM Schedules – Rollup Checkbox

The Rollup checkbox on PM Schedule allows your site to use rollups, but to ignore the feature for certain PM's.
By default, this checkbox is checked ON.

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

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

PM – PM Skill Report for Labor Leveling

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

- **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	38	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	
TEC				8												
Grand Total:		5	5	9	1	5	5	1	1	1	5	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.**

Detail | Criteria | Refresh | Print | Help | Close

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Scheduling – Assigning Employees

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

Scheduling – Assigning Employees

Scheduling – Assigning Employees

Work Order Schedule by Date

Show Resources/ ☑ | Change Selection | Create Schedule | Actions ... | ✕ Close
Employees

Saturday, September 27, 2003

Scheduled Time	Work Order/ Description		Equipment/ Serial Id	Supervisor/ Planner	Area/ Department
	RT009025 valve at inlet needs replacing		95P-20A 05-70-70	BCUR2025	SRU2 111

Equip Desc K.O. Drum Pump Acid Gas
Resource Id Mech   **Remaining Hours**   4   **Workers**
Employee 1 CREWS, DONNIE V.

RT009026 Repair Pump		95P-20A 05-70-70

Equip Desc K.O. Drum Pump Acid Gas
Resource Id ELEC   **Remaining Hours**   4   **Workers**
Employee 1 THOMPSON, ANTHONY A.
Employee 2 PRIOR, JOHN

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

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Scheduling – Saving and Printing Schedules

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

Scheduling – Displaying Scheduled Date/Time

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

Scheduling – Interface to Microsoft Project

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

Security Access for MS Project Interface

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

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Additional 5.1 Enhancements to the Work Order and Equipment Modules

WO Enhancements – Inactive Employee Flag

Time charges cannot be entered for employees flagged as Inactive.

WO Enhancements – Primary Resource Flag

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

Cance
New

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

Valid Resource Values

Code	Description	Avg Rate	Active
CARP	CARPENTER	$13.500	☑
COMP	COMPUTER TECHNICIAN	$12.750	☑
CR-Elec	Carrier Elec	$21.000	☑
CR-Mech	Carrier Mech	$20.000	☑
CST	CASTROL SERVICE TECH	$15.000	☑
CSX-Elec	CSX Electrician	$17.000	☑
CSX-Mech	CSX Mechanic	$15.000	☑
E.HELP	ELECTRICIANS HELPER	$8.800	☑
EL01 Groth	Electrician 01 Bill Groth	$12.000	☑

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WO Enhancements – New Labor Activity Data

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.

Plant	Transaction Date	Transaction Time	Work Order #	Employee Id	Labor Activity Account	Employee Supervisor
DF0	4/3/2003	11:44:39:312	RT009706	TRAIN5		
	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
				TRAIN5	Other-20	
				TRAIN6		001
				TRAIN6	000-CPC-Intl23	001
				TRAIN6	000-CPC-Intl23	001

WO Enhancements -   Print Open WO's for Equipment

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

WO Enhancements – Event Notebook and Search

- **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

Document Interface Control

☑ Print Documents with Work Order

✖ Cancel   ✓ OK

| TabWare Standard Links | Spicer Print Options |

Spicer Print Options

Maximum Pages to Print Per Document `10`

Print Page Number on Header ☑

Print File Path on Header ☑

Print Work Order Number on Header ☑

This window in Setup allows you to configure the add-on software used to print Work Order documents.

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WO Enhancements - Change to WO Completion Edit

Define Item Types

Item Type
- Service
- ServiceC

Item Type
ServiceC

Description
ServiceC

- ○ 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)

- ☑ 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

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

OK   Cancel

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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.**
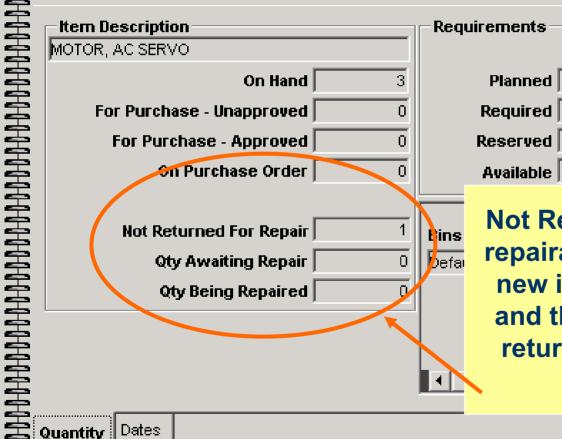
Additional Enhancements - Inventory

- **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.**

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Repairables - Tracks Qty Not Returned for Repair

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

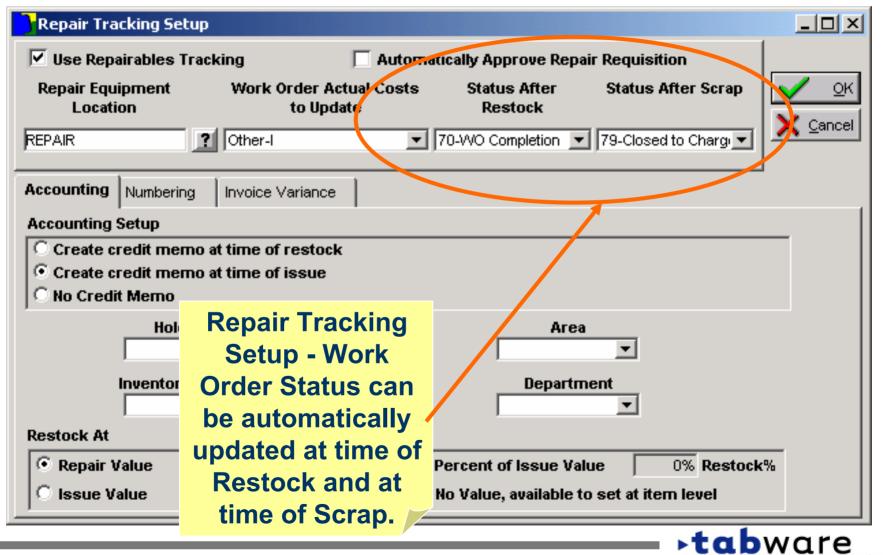The new Repair Approver checkbox allows for separation of duties between approving reorders and approving outside repairs.

Repairables – Update WO Status at Restock/Scrap

Repair Tracking Setup - 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

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.

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