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PeopleSoft Enterprise Maintenance Management 9.0 PeopleBook

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About This PeopleBook Preface

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

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Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

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Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

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Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

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Oracle's PeopleSoft Enterprise Maintenance Management Preface

This chapter discusses:

- PeopleSoft Enterprise products.
- PeopleSoft Enterprise application fundamentals.
- Pages with deferred processing.
- Common elements used in this PeopleBook.
- About these PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Enterprise Products

This PeopleBook refers to these PeopleSoft Enterprise products and product lines:

- PeopleSoft Enterprise Asset Management.
- PeopleSoft Enterprise Project Costing.
- PeopleSoft Enterprise Purchasing.
- PeopleSoft Enterprise Inventory.
- PeopleSoft Enterprise Cost Management.
- PeopleSoft Enterprise IT Asset Management.
- PeopleSoft Enterprise Expenses.
- PeopleSoft Enterprise Program Management.
- PeopleSoft Enterprise Payables.
- PeopleSoft Enterprise Resource Management.
- PeopleSoft Enterprise General Ledger.
- PeopleSoft Enterprise Real Estate Management.
- PeopleSoft Enterprise HCM.
- PeopleSoft Enterprise CRM.

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PeopleSoft Enterprise Application Fundamentals

The *PeopleSoft Enterprise Maintenance Management PeopleBook* provides you with implementation and processing information for the PeopleSoft Enterprise Maintenance Management application. However, additional essential information describing the setup and design of your system resides in companion documentation. This companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

The following companion PeopleBooks apply specifically to PeopleSoft Enterprise Maintenance Management.

- *PeopleSoft Enterprise Application Fundamentals PeopleBook.*
- *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals PeopleBook*
- *PeopleSoft Enterprise Asset Management PeopleBook*
- *PeopleSoft Enterprise Global Options and Reports PeopleBook.*
- *PeopleSoft Enterprise Inventory PeopleBook*
- *PeopleSoft Enterprise Project Costing PeopleBook*
- *PeopleSoft Enterprise Purchasing PeopleBook*
- *PeopleSoft Enterprise Payables PeopleBook*
- *PeopleSoft Enterprise Program Management PeopleBook*
- *PeopleSoft Enterprise CRM PeopleBook*
- *PeopleSoft Enterprise Resource Management PeopleBook*
- *PeopleSoft Enterprise General Ledger PeopleBook*
- *PeopleSoft Enterprise HRMS PeopleBooks*
- *PeopleSoft Enterprise eProcurement PeopleBook*

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resources	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Enterprise Integration Point (EIP) Catalog
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Hardware and Software Requirements

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Resources	Navigation
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table-loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Implement, Optimize + Upgrade, Upgrade Guide

Pages with Deferred Processing

Several pages in PeopleSoft Maintenance Management operate in deferred processing mode. Operating in deferred processing mode provides for a more responsive user experience with these pages. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page—for example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system may update quantity balances or totals when you save or otherwise refresh the page.

See the guidelines for designing pages in the *Enterprise PeopleTools PeopleBook: Application Designer*.

Common Elements In This PeopleBook

Short Description Enter short descriptive text to be used in reports and other pages.

Description Enter detailed descriptive text to be used in reports and other pages.

Asset Type and **Asset Subtype** and **Manufacturer ID** and **Model** Use these fields as a means to classify assets so that you can associate templates, preventive maintenance schedules, failure tracking codes, warranties, maintenance equipment parts lists, and a variety of other attributes with the assets.

Note. In Maintenance Management you must select an asset type and asset subtype before you can select a manufacturer's name and model.

See Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," page 125.

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Instructions	Click this link to access the Task Instructions grid where you can enter a list of instructions for a work order task.
Checklist	Click this link to access the Task Checklist grid where you can enter a checklist in step by step order of things to do before a work order task begins (*pretask*), and after a work order task is finished (*post task*).
Attachments	Click this link to access the Attachments grid where you can attach data files such as drawings, schemas, charts, and other data to the work order task.
Supplemental Data	Click this link to access the Work Order Supplemental data or the Work Order Task Supplemental data page and review the supplemental data created for this work order. See Chapter 24, "Using Supplemental Data," page 653.
Notes	Click this link to access the Work Order Notes page or the Work Order Task Notes page where you can add and print notes relevant to this work order or work order task and review the history of any notes written previously.
Effective Date and **Status**	Enter or select a date that applies to the selected status of a feature. For example, when you set up a task template, you select the date from which the task template is in effect and select if the status of the template is *Active* or *Inactive*
Currency	Displays the default value that is derived from the selected work order business unit.
Chargebacks	Select whether you want the chargeback amount to default to the work order or whether the user can specify it. Select this check box to enable chargebacks to be calculated and generated for any work order that uses this work order type. See Chapter 3, "Understanding PeopleSoft Maintenance Management," PeopleSoft Maintenance Management Integration with PeopleSoft Project Costing, page 18.

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CHAPTER 1

Getting Started with PeopleSoft Enterprise Maintenance Management

This chapter presents an overview of Oracle's PeopleSoft Enterprise Maintenance Management and discusses:

- PeopleSoft Maintenance Management business processes.
- PeopleSoft Maintenance Management integration touch points.
- PeopleSoft Maintenance Management implementation.

PeopleSoft Maintenance Management Overview

PeopleSoft Enterprise Maintenance Management serves a key role in the Plan to Retire business process by enabling your organization to plan, construct, maintain, and replace assets in accordance with your organization's strategic goals.

With this application, you can:

- Create an online self-service service request to obtain either service or repair on an asset.

  If the agent receiving the service request needs additional help in completing the request, then the agent can create a work order based on the service request.

- Create and approve a work order to serve as the primary vehicle for planning, scheduling, executing, and costing the maintenance, repair, upgrade, and construction of assets.

  Users can initiate work orders from the PeopleSoft CRM Help Desk application, PeopleSoft Project Costing, PeopleSoft Program Management, and Service Requests in PeopleSoft Maintenance Management. They can create and manage express work orders, standard work orders, and preventive maintenance work orders. In addition, using Web Services functionality, an external system monitors the condition of an asset and issues an alert to PeopleSoft Maintenance Management when the condition of the asset is abnormal and needs maintenance or repair. A planner/scheduler then creates a condition-based work order. PeopleSoft Maintenance Management integrates with PeopleSoft Asset Management to manage and track the retirement, replacement, and disposal of assets, as well as handle asset component changeouts. Users can also generate warranty claims for assets selected for work order tasks.

- Set up work order job templates and work order task templates to predefine work order task requirements.

  Templates define combinations of resources that you can apply to work orders and work order tasks, reducing the amount of data entry needed to define work orders and lowering the potential for errors.

- Create work order tasks within the work order that specifically define all aspects of each activity needed to complete a work order.

- Optionally assign each work order task to a problem group, problem, cause, and resolution to facilitate tracking and analysis of issues and failures and standardize resolutions to problems.

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- Plan and identify labor, inventory, purchasing, and tool resource requirements and determine estimated costs for each work order task that is needed to complete a work order.

  Use Inventory, if desired, to plan and identify inventory parts requirements needed to complete a work order task. You can also use PeopleSoft Purchasing to procure labor, tools, and non-inventory material resources.

- Schedule labor resources:
  - Determine the availability and qualification of individual labor resources in order to schedule them appropriately to work order tasks.
  - Establish crew capacity and availability to schedule a crew in the Crew Scheduling Workbench for a specified period of time.
  - Use the Labor Assignment Workbench to assign individuals and members of crews to multiple work orders and work order tasks.
  - Use crew metrics to measure crew performance, which includes scheduled hours, unplanned hours, carryover hours, and completed hours, to plan for crew scheduling in future periods.
- Schedule Inventory parts:
  - Specify inventoried parts, check the availability, commit the parts, and reserve the parts in inventory to schedule their use for each work order task.
  - If available, select inventory parts associated with an asset using the Equipment Parts List (EPL) set up in PeopleSoft Asset Management.

    You can set up an equipment parts list (EPL) in PeopleSoft Asset Management that defines inventory and non-inventory materials that are used to maintain and repair an asset. Users can access EPL directly from PeopleSoft Maintenance Management and use it to define resource requirements when scheduling a work order task.

Note. Use of Inventory is optional.

- Schedule the purchase of non-inventoried items, tools, and labor services, as well items that are on-hand in the shop.
  - Check for the availability of selected non-inventory rows.
  - Create purchase orders or requisitions for selected rows.

Note. Installation of PeopleSoft Purchasing is required for PeopleSoft Maintenance Management.

- Schedule tools:

  Check tool availability.

- Create time-driven and/or meter-driven preventive maintenance schedules that enable the application to calculate the next maintenance due date and automatically generate work orders.

  Each preventive maintenance schedule is associated with a work order job template, which defines the resource requirements and task steps for the work order. Users run the Preventive Maintenance (WM_PM) process to generate work orders. They can also run the Preventive Maintenance Projection process to generate projections that can be viewed online or loaded into Microsoft Project.

- Export work order scheduling data and preventive maintenance projections into Microsoft Project for workload balancing, planning, and tracking, and import the files into PeopleSoft Maintenance Management.
- Enable assigned schedulers to manage their work order schedules using the Work Order Workbench.
- Execute and complete work orders:

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  - Enable technicians, or an authorized user, to access the Technician Workbench, where they can enter time spent on a work order task for individuals and crews, as well as report and update usage of materials and tools.

    A technician can also print out assigned tasks, change the status of work order tasks, update actual dates and times, add problem, cause, and resolution data, enter meter readings, identify causal parts, view and add work order task notes, update specific asset information, including asset downtime, view work order task instructions, update work order task checklists, and work with file attachments. This feature also has powerful and flexible task searching capabilities.

  - Use the Work Order Completion component to expedite the entry of labor time, material and tool usage, enter causal parts, complete the checklist, update meter readings, review and add notes, enter asset downtime, and change the status for tasks associated with a single work order.

- Integrate with PeopleSoft Project Costing and PeopleSoft Asset Management to capture actual work order costs, calculate asset capitalization, and generate chargeback accounting entries based on work performed on an asset.
- Automatically close the work order and update and track all costs in PeopleSoft Maintenance Management.
- Review inquiries, which include the Asset Maintenance History, Work Order History, Work Progress Tracking, Purchasing and Pegging, Chargeback, Capitalization, Crew Schedule, Crew Schedule Metrics, Crew Capacity Plan, Preventive Maintenance, and Preventive Maintenance Projections.
- Generate reports, which include the Crew Capacity Report, Crew Schedule and Assignment Report, Crew Unscheduled Work Report, Crew Carryover Work Report, Schedule Completion Report, Material Readiness Report, Preventive Maintenance Reports, Labor Assignment Report, Material Assignment Report, Procurement/On-Hand Report, Tool Assignment Report, Instruction Report, Checklist Report, Work Order Notes Report, Work Order Task Notes Report, and Equipment Parts List.

PeopleSoft Maintenance Management Business Processes

We discuss these business processes in the business process chapters of this PeopleBook.

- Creating a service request.
- Creating a work order.
- Approving a work order.
- Defining labor, inventory, non-inventory, and tool resource requirements.
- Scheduling labor, inventory, non-inventory, and tool resources for a work order.
- Performing crew scheduling.
- Executing a work order, recording and capturing costs, and updating the PeopleSoft Maintenance Management transactions in the appropriate subsystems.
- Generating a work order using the Preventive Maintenance process (WM_PM).
- Generating projections using the Preventive Maintenance Projection process.
- Closing a work order and updating PeopleSoft Maintenance Management costs.
- Tracking PeopleSoft Maintenance Management costs.
- Performing PeopleSoft Maintenance Management inquiries.
- Generating PeopleSoft Maintenance Management reports.

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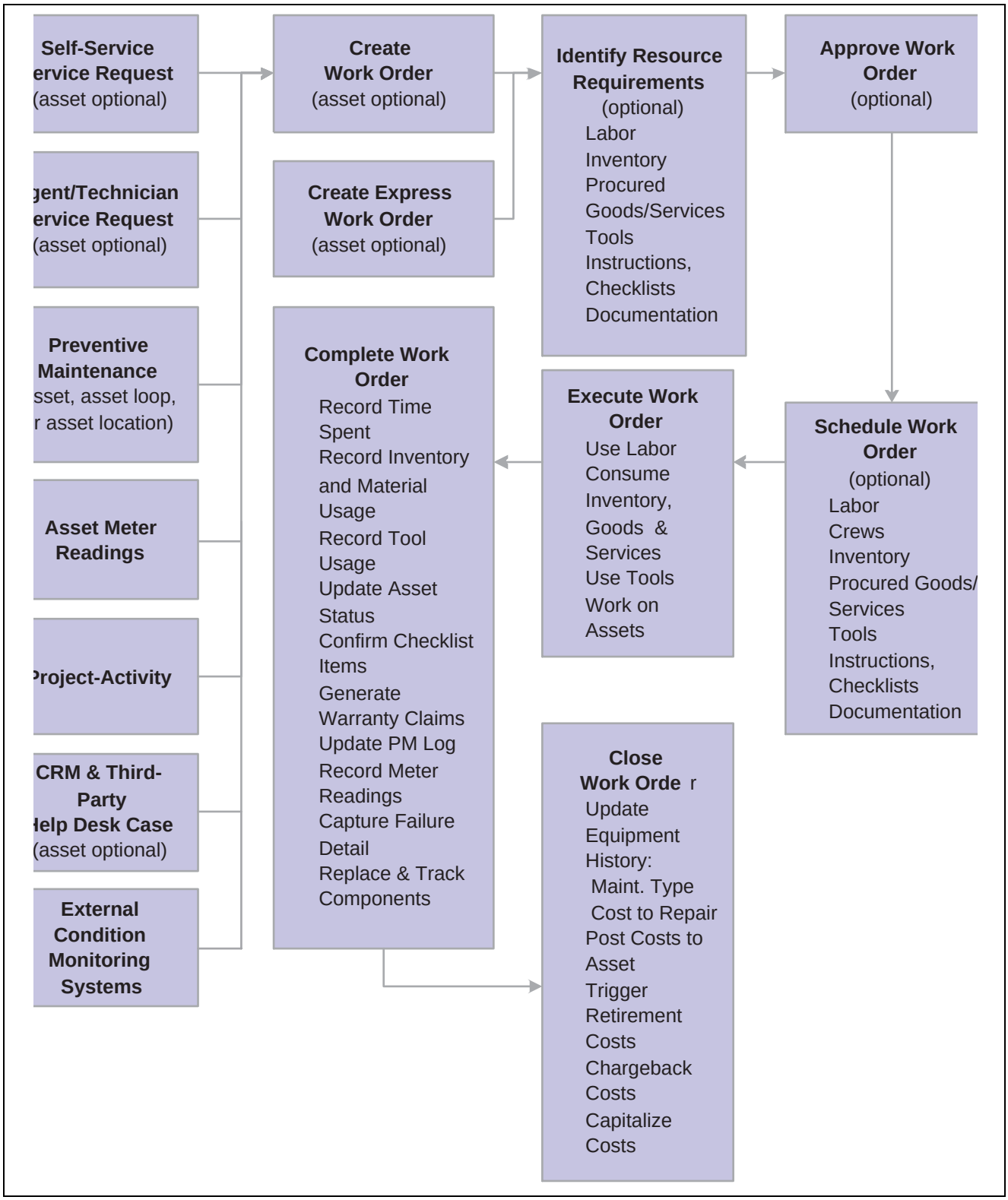
The following process flow introduces PeopleSoft Maintenance Management business processes.



PeopleSoft Maintenance Management Business Processes

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PeopleSoft Maintenance Management Integration Touchpoints

PeopleSoft Enterprise Maintenance Management integrates with these PeopleSoft applications.

- PeopleSoft Enterprise Asset Management.
- PeopleSoft Enterprise Project Costing.
- PeopleSoft Enterprise Purchasing.
- PeopleSoft Enterprise Payables.
- PeopleSoft Enterprise General Ledger.
- PeopleSoft Enterprise Inventory.
- PeopleSoft Enterprise IT Asset Management.
- PeopleSoft Enterprise Expenses.
- PeopleSoft Enterprise Real Estate Management.
- PeopleSoft Enterprise Resource Management.
- PeopleSoft Enterprise Program Management.
- PeopleSoft Enterprise CRM.

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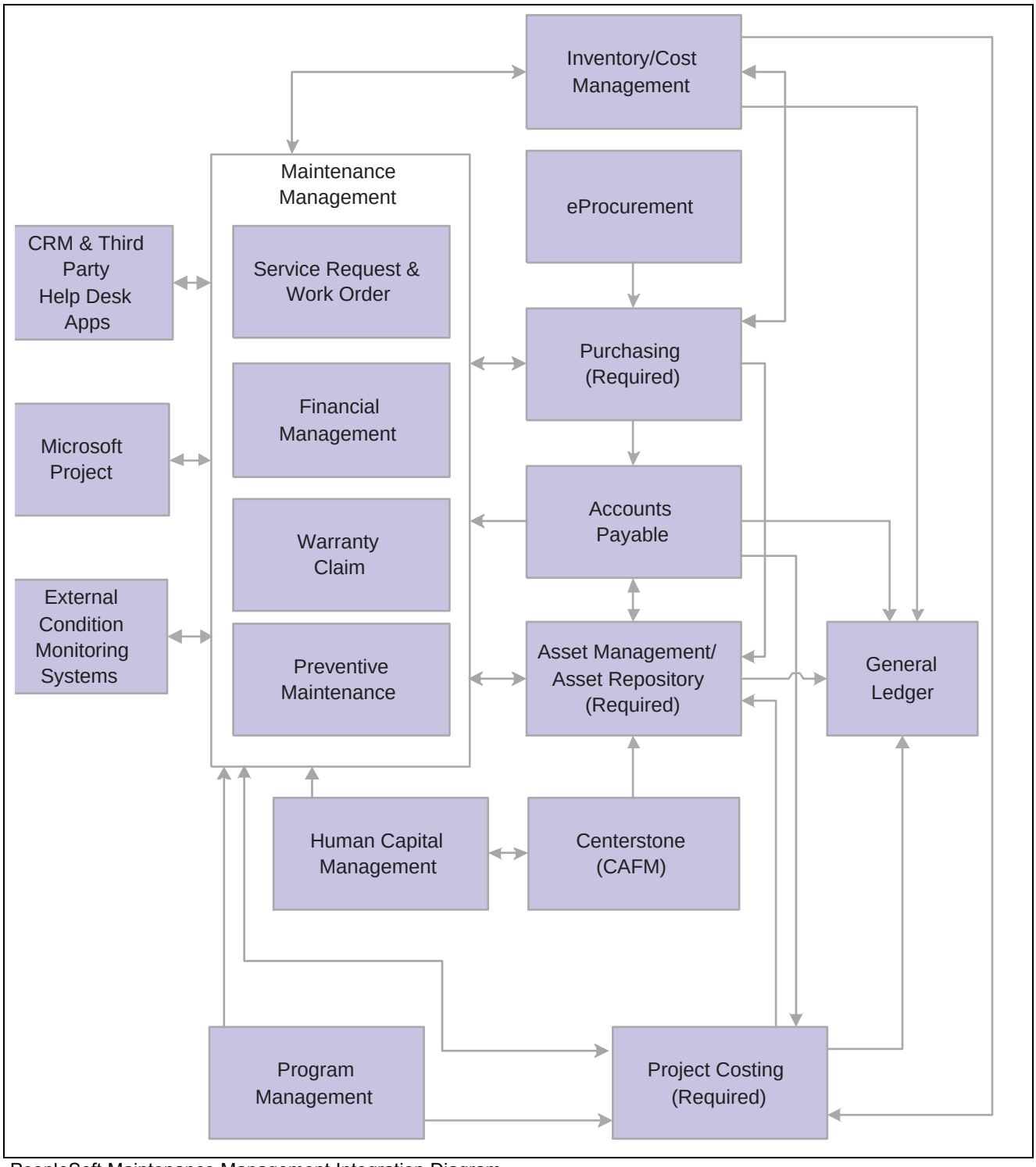

PeopleSoft Maintenance Management Integration Diagram

We discuss the integration considerations in the implementation chapters of this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection web site. Third-party products that are used by PeopleSoft Maintenance Management are:

- Microsoft Project.

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- Verity.

PeopleSoft Maintenance Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook* with information about where to find the most current version of each.

See Also

About These PeopleBooks

Enterprise PeopleTools PeopleBook: "Setup Manager"

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CHAPTER 2

Navigating in PeopleSoft Enterprise Maintenance Management

This chapter discusses how to navigate in Oracle's PeopleSoft Enterprise PeopleSoft Maintenance Management.

Navigating in PeopleSoft Enterprise Maintenance Management

PeopleSoft Enterprise Maintenance Management provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Enterprise Maintenance Management custom navigation pages, the PeopleSoft system provides menu navigation and standard navigation pages.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in PeopleSoft Enterprise Maintenance Management

This table lists the custom navigation pages that are used to navigate in PeopleSoft Enterprise Maintenance Management.

Maintenance Management Center

The Maintenance Management Center custom navigation pages are geared to the person in your organization who is focused on all aspects of maintenance management, including business processes and data setup. This table lists the custom pages that are used to navigate in PeopleSoft Enterprise Maintenance Management:

Page Name	Navigation	Usage
Maintenance Management Center	Maintenance Management, Maintenance Management Center	Access primary Maintenance Management menu options and activities.

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Page Name	Navigation	Usage
Asset Administration	Click the Asset Administration link on the Maintenance Management Center page.	Access the Asset Administration page to access the Asset Definitions Center to set up asset and component information, define asset hierarchy, establish equipment parts lists, and define other asset operations and maintenance data.
Asset Definitions Center	Click the Asset Definitions Center link on the Asset Administration page.	Access the Asset Definitions Center custom navigation page, where you can administer asset setup and configuration information.
Condition Based Monitoring	Click the Condition Based Monitoring link on the Maintenance Management Center page.	Perform condition-based maintenance setup and create alerts.
Crew Scheduling	Click the Crew Scheduling link on the Maintenance Management Center page.	Access the Crew Scheduling Workbench and the Labor Assignment Workbench. Define crew capacity plans, review and analyze metrics, and run the reschedule history.
Inquiries and Reports	Click the Inquiries and Reportslink on the Maintenance Management Center page.	Review asset maintenance history and work order history, track work progress, review work order procurement, review chargebacks, review capitalization, review crew schedules, and print and review the Material Readiness Report.
Crew Scheduling Reports	Click the Crew Scheduling Reports link on the Inquiries and Reports page.	Review and print the Capacity Report, Crew Schedule and Assignment Report, Crew Unscheduled Work Report, Crew Carry Over Work Report, and Schedule Completion Report.
Labor Administration	Click the Labor Administration link on the Maintenance Management Center page.	Manage employee data, set up labor programs and groups, maintain eligibilities, map employees to crafts, and edit profiles.
Maintenance Management Setup	Click the Maintenance Management Setup link on the Maintenance Management Center page.	Access options for setting up PeopleSoft Maintenance Management.
Accounting Defaults	Click the Accounting Defaults link on the Maintenance Management Setup page.	Set up capitalization rules, distribution templates, and distribution template rules.
Approvals	Click the Approvals link on the Maintenance Management Setup page.	Define user lists, create approval processes, maintain email notification templates, and define the system transactions that require approvals.

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Page Name	Navigation	Usage
Business Unit and Preferences	Click the Business Unit and Preferences link on the Maintenance Management Setup page.	Define service request business units, work order business units, work order options, and user preferences.
Problem Cause Resolution Setup	Click the Problem Cause Resolution Setup link on the Maintenance Management Setup page.	Define problem codes, cause codes, resolution codes, problem groups, and problem trees.
Projects Related	Click the Projects Related link on the Maintenance Management Setup page.	Set up which projects can be used for a specific business unit - work order type - service group combination. Set up work order project ChartField mapping.
Purchasing Integration Setup	Click the Purchasing Integration Setup link on the Maintenance Management Setup page.	Setup information for integration with Purchasing.
Resource Setup	Click the Resource Setup link on the Maintenance Management Setup page.	Define crews, shops, shifts, and crafts, and set up task categories.
Setup Information	Click the Setup Information link on the Maintenance Management Setup page.	Set up task categories, work order types, work order service groups, priority, maintenance type, downtime reasons, CBM rules, work order status definitions, status display rules, schedule patterns and periods, crew rescheduling reason codes, and manufacturer/model relationships.
Supplemental Data Setup	Click the Supplemental Data Setup link on the Maintenance Management Setup page.	Define supplemental data records and display groups. Assign display groups.
Templates	Click the Templates link on the Maintenance Management Setup page.	Set up templates for job requirements and task requirements.
Portal Setup	Click the Portal Setup link on the Maintenance Management Center page.	Refresh portal pagelet metrics for work order related and asset related metrics.
Preventive Maintenance	Click the Preventive Maintenance link on the Maintenance Management Center page.	Run the Preventive Maintenance process and review preventive maintenance logs, due dates, and work order information. Run the Projection process, review summary and detailed projection information, and access the PM Schedule Management Setup page.
PM Schedule Management Setup	Click the PM Schedule Management Setup link on the Preventive Maintenance page.	Maintain and manage preventive maintenance schedules, set up maintenance loops, copy schedules, and access the PM Schedule Workbench.

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Page Name	Navigation	Usage
Schedule Management	Click the Schedule Management link on the Maintenance Management Center page.	View and update labor resource and asset schedules.
Service Request Management	Click the Service Request Management link on the Maintenance Management Center page.	Create, update, and review service requests.
Warranty Claim	Click the Warranty Claim link on the Maintenance Management Center page.	View or update warranty claims, and generate a new cost recovery claim.
Work Order Management	Click the Work Order Management link on the Maintenance Management Center page.	Define and edit work orders, create and update express work orders, update task accounting and approvals, manage integration with Microsoft Project, enter work order completion time entries and data, enter and review asset downtime, print a work order, and access Work Order Processing page.
Work Order Processing	Click the Work Order Processing link on the Work Order Management page.	Summarize costs from PeopleSoft Project Costing, stage time entries, and close work orders and requests.
Workbenches	Click the Workbenches link on the Maintenance Management Center page.	Access the Work Order Workbench, Crew Scheduling Workbench, Technician Workbench, PM Schedule Workbench, and Labor Assignment Workbench.

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CHAPTER 3

Understanding PeopleSoft Maintenance Management

This chapter presents and overview and introduces the main concepts in Oracle's PeopleSoft Maintenance Management application and discusses:

- PeopleSoft Maintenance Management setup.
- PeopleSoft Maintenance Management work order creation.
- Work order processing.

PeopleSoft Maintenance Management System Overview

Proper maintenance of an organization's asset infrastructure is essential to ensuring safety, complying with regulations, and achieving the financial and operational targets that are established by the organization's management. PeopleSoft Maintenance Management enables organizations to create work orders, schedule the resources to perform the tasks that are identified on the work orders, and track the costs that are associated with the maintenance and repair of these assets. In addition, the employees of an organization, as well as the nonemployees, can create a service request using an online self-service form to request that an agent arrange for the performance of maintenance, repair, or facility move activities. If necessary, the agent can create a work order based on a service request. In PeopleSoft Maintenance Management, a work order can consist of one or more work order tasks. A work order can address a single asset, multiple assets, or a general service that is not associated with a particular asset. Each task specifies the work that is required and optionally, the asset that requires repair or maintenance.

This section discusses:

- PeopleSoft Maintenance Management process flow.
- PeopleSoft Maintenance Management integrations.
- PeopleSoft Maintenance Management integration with PeopleSoft Asset Management.
- PeopleSoft Maintenance Management integration with PeopleSoft Project Costing.
- PeopleSoft Maintenance Management integration with PeopleSoft Purchasing and PeopleSoft Payables.
- PeopleSoft Maintenance Management integration with PeopleSoft Inventory.
- PeopleSoft Maintenance Management integration with PeopleSoft ALM Portal Pack.
- PeopleSoft Maintenance Management integration with PeopleSoft Program Management.
- PeopleSoft Maintenance Management integration with PeopleSoft CRM and third-party help desk applications.
- PeopleSoft Maintenance Management integration with condition-based monitoring systems.

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- PeopleSoft Maintenance Management integration with PeopleSoft Resource Management.
- PeopleSoft Maintenance Management integration with PeopleSoft Time and Expense functionality.
- Microsoft Project.

Users can:

- Determine labor, inventory, noninventoried materials and services, and tool resource requirements for each task.
- Calculate the estimated costs.
- Assign and schedule the resources for each task.
- Update the usage of resources when the task is carried out to generate cost transactions in the subsystems.

The Work Order Workbench offers an efficient user interface for planners, supervisors, and schedulers to rapidly schedule each work order task. To reduce the burden of scheduling each technician, the Crew Scheduling Workbench provides an efficient means for scheduling labor resources at a crew level in specific periods and establishes the scheduled hours metrics by crew and craft for future schedule completion and compliance analysis. Once crew scheduling is completed for the next period, the craft supervisor can use the Labor Assignment Workbench to assign each technician to the scheduled tasks. This workbench enables the supervisor to view the daily availability of all crew members at one time and allocate the workload appropriately. When the work is performed, the Technician Workbench enables technicians to access key work order task information, print the work order and associated documentation, and record the details of the performed work. If an organization wants to expedite time and resource entry based on the tasks that are associated with one work order, they can use the Work Order Completion component.

You can also create preventive (recurring) maintenance schedules from which the system can automatically generate work orders based on the passage of time or meter readings. Users can generate work forecasts and load the detail into Microsoft Project to plan workloads.

Each work order task is associated with one project activity. Project activities track the costs that are incurred by each work order task and the work order. Depending on your setup, work order costs can flow from PeopleSoft Maintenance Management, PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Payables into PeopleSoft Project Costing. PeopleSoft Project Costing can also capitalize and charge back the costs of each work order task based on the eligibility of the task for these transactions. After the close of an individual work order task, PeopleSoft Project Costing performs any capitalization calculations to increase the value of an asset in PeopleSoft Asset Management. Users can indicate that they want PeopleSoft Project Costing to charge back work order costs to another organization. Chargebacks occur upon the close of a work order. Work order tasks can also trigger the retirement of financial assets.

For equipment and all other types of assets, PeopleSoft Maintenance Management can provide warnings that warranties are in effect and lets users create warranty claims based on the detail that is captured on work orders.

Although the application is called PeopleSoft Maintenance Management, it is tightly integrated with other applications to facilitate the management of project-oriented initiatives. With PeopleSoft Project Costing and PeopleSoft Maintenance Management, you can manage demolition, large-scale maintenance expenses, and capital projects, and if you need more advanced project scheduling, monitoring, and reporting, you can use PeopleSoft Program Management.

PeopleSoft Maintenance Management Process Flow

This is an overview of the PeopleSoft Maintenance Management process flow:

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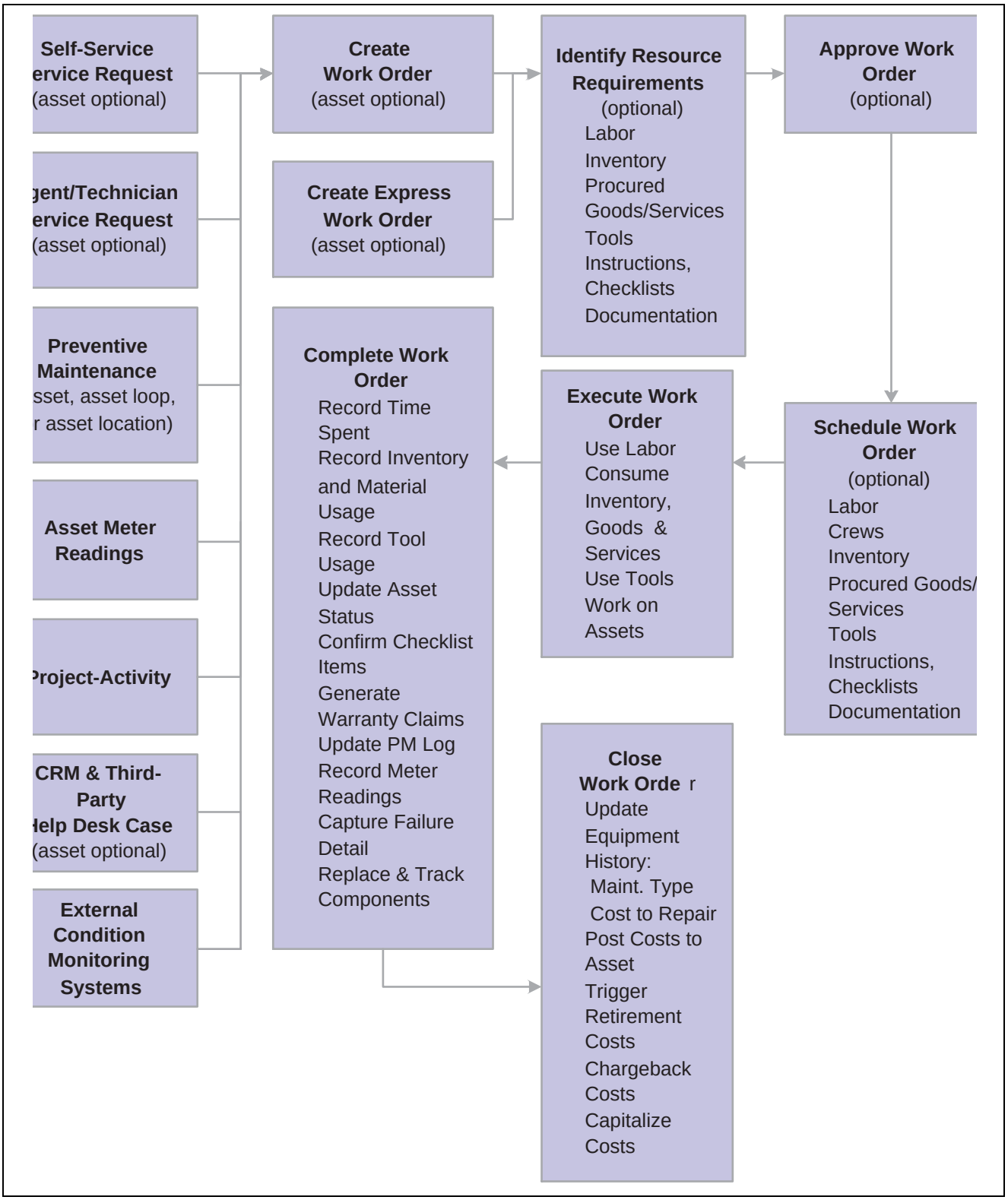

PeopleSoft Maintenance Management Process Flow

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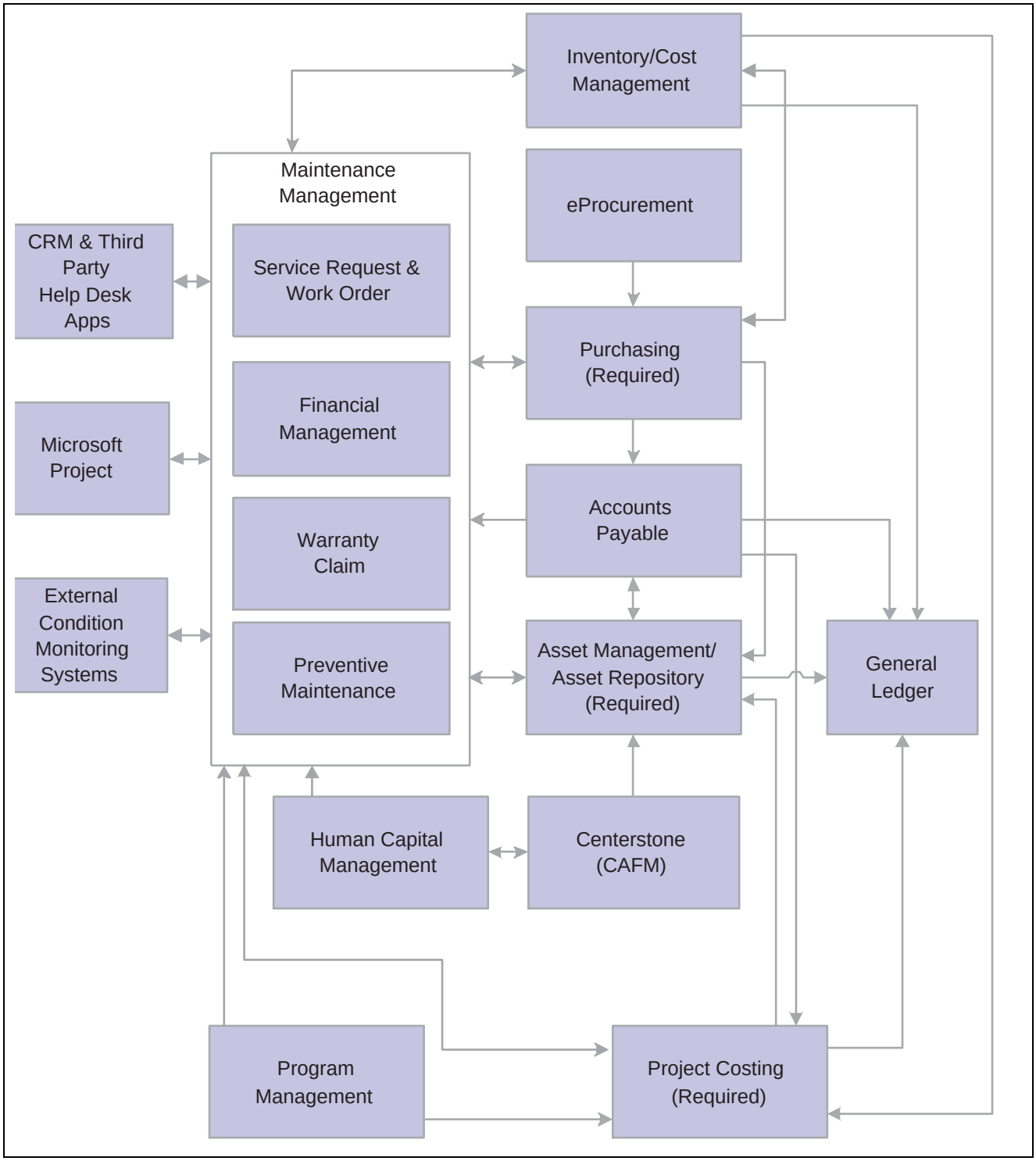
PeopleSoft Maintenance Management Integrations

PeopleSoft Maintenance Management integrates with numerous PeopleSoft applications as shown the integration diagram:



PeopleSoft Maintenance Management Integration

You are required to install three PeopleSoft applications to use PeopleSoft Maintenance Management, which include:

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- PeopleSoft Asset Management
- PeopleSoft Project Costing
- PeopleSoft Purchasing

Other PeopleSoft applications that are normally used, but are not required, with PeopleSoft Maintenance Management are:

- PeopleSoft Inventory.
- PeopleSoft ALM (Asset Lifecycle Management) Portal Pack.
- PeopleSoft Program Management.
- PeopleSoft CRM (Customer Response Management) and Third-party Help Desk Applications.
- External Condition-based Monitoring Systems

You have access to much of the functionality of PeopleSoft Resource Management and some of the time reporting functionality of the PeopleSoft Payables module in PeopleSoft Maintenance Management. However, all of this functionality exists in PeopleSoft Maintenance Management, which means that you do not need to install PeopleSoft Resource Management and PeopleSoft Expenses to use PeopleSoft Maintenance Management.

External Condition Monitoring Systems can also integrate with PeopleSoft Maintenance Management to enable the creation of condition-based work orders.

You can also integrate with PeopleSoft Help Desk 8.9 and beyond and other third-party help desk applications to create a corresponding work order and receive automatic updates as the work order progresses.

PeopleSoft Maintenance Management Integration with PeopleSoft Asset Management

The purpose of PeopleSoft Maintenance Management is to enable users to create work orders to maintain and repair assets. Therefore, users must select the assets that require work directly in PeopleSoft Maintenance Management. To accomplish this, PeopleSoft Maintenance Management integrates with the PeopleSoft Asset Management asset repository.

Users can:

- Search for an asset based on the asset tag number, serial ID, asset ID, Asset Management business unit, asset description, asset location, asset area ID, asset criticality, asset type, asset subtype, manufacturer ID, model, asset status, and whether the asset is a linear asset directly from the work order.

  You can also refine your search when you select the asset type, asset subtype, manufacturer ID, and model by clicking a Supplemental Data Criteria link, which uses the selected asset characteristics and displays associated supplemental data information such as Maintenance Information, Hardware Information, and Machinery Information, depending on the selected characteristics.
- Indicate whether they want to identify an asset by serial number, asset ID, tag number, or vehicle identification number (VIN) in the work order business unit.
- Access any warranties that are associated with an asset that you identify in the work order and create warranty claims, when applicable, directly from the work order.
- Access Asset Maintenance History from the work order for the selected asset.
- Access the asset repository to identify tools by their asset characteristics (asset type, asset subtype, manufacturing ID, model) for use in completing work order tasks.

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- Optionally select inventory and noninventory materials to maintain or repair an asset from an Equipment Parts List (EPL), which is set up in PeopleSoft Asset Management.

  The system copies these items to the work order task or to a work order task template, depending on your setup.

- Optionally define common problems, the cause of problems, and the resolution of problems, and create various combinations of these features into problem groups.

  When you create a problem group, you can associate it with an asset type, subtype, manufacturer, and model to help users quickly sort through the list of possible solutions to an asset's problems.

- Enter and track the downtime of an asset at the work order task level.

- Automatically track component changeouts, which means that you can remove, replace, and retire a capital asset that belongs to a parent asset.

  You can retire all kinds of assets, as well as install a capital asset component in a parent asset, using a work order in PeopleSoft Maintenance Management.

When you create preventive maintenance schedules to generate preventive maintenance work orders for an asset, a group of assets (loop), or an asset location, you can determine the maintenance that is due based on meter-based readings and the passage of time. The Preventive Maintenance process (WM_PM) and the Preventive Maintenance Projection process calculate the next date due for preventive maintenance work orders or projections based on the scheduled recurrence pattern of the Preventive Maintenance schedule or the meter reading values that are found in the PeopleSoft Asset Management Meter Reading table and PeopleSoft Asset Management Meter History.

You can set up capitalization filters in PeopleSoft Maintenance Management to control which costs are sent to PeopleSoft Asset Management for capitalization or for inclusion in the cost of removal when retiring an asset. Although the costs to capitalize or to consider as costs of removal are attributable to work orders that are created in PeopleSoft Maintenance Management, PeopleSoft Project Costing collects the costs, summarizes them, and transmits them to PeopleSoft Asset Management for the appropriate accounting treatment.

PeopleSoft Maintenance Management Integration with PeopleSoft Project Costing

When you create a work order, you must associate it with a project. Each work order task is associated with one project activity. You must install PeopleSoft Project Costing before you can use PeopleSoft Maintenance Management. You can generate work order transactions in PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Inventory. These feeder systems then send work order costs to PeopleSoft Project Costing. Labor time entries are staged either manually or automatically depending on how they are entered in the PeopleSoft Payables staging tables. Tool usage is calculated in PeopleSoft Maintenance Management and sent directly to PeopleSoft Project Costing. When the Cost Collection process is run in PeopleSoft Project Costing for PeopleSoft Purchasing, PeopleSoft Payables, PeopleSoft Inventory, PeopleSoft Expenses, and PeopleSoft Maintenance Management (tools), these costs are stored in the PROJ_RESOURCE table of PeopleSoft Project Costing where they are priced. They remain in the PROJ_RESOURCE table until PeopleSoft Project Costing accesses these costs to perform asset capitalization, calculate costs for retirement for assets that are being retired through a work order, and calculate chargebacks, which are forwarded to the General Ledger. The costs are updated in PeopleSoft Maintenance Management by the Cost Summarization process and appear on the Cost page of the Work Order component. They are used for cost tracking, analysis, and reporting .

The two types of projects that you can associate with a work order are:

- A Project Costing-managed project.
- A work order-managed project.

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See Chapter 4, “Understanding Integrated and Shared Products Setup Considerations,” page 57.

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

Work Order Creation for Project Costing-Managed Projects

A Project Costing-managed project is any project that is set up and managed in PeopleSoft Project Costing along with its activities. You can create a work order directly from Project Costing in which one of the project’s activities is associated with a work order task.

For example, a utility company sets up Project 001 - Maintain and Repair Power Lines and Equipment on Park Avenue in New York City in Project Costing. Activity 001 for this project is to Maintain Power Equipment from 40th St. N. to 51st St. N. The project manager creates two work orders from PeopleSoft Project Costing in PeopleSoft Maintenance Management for this Project Costing-managed project:

Work Order 001 - Maintain power lines.

- Work Order Task 001 - Replace transformer (Asset 001 - Transformer) - For Project 001 - Activity 001
  - Task resource transaction 001 - Labor cost to replace transformer.
  - Task resource transaction 002 - Material cost for new transformer.
- Work Order Task 002 - Galvanize lines (Asset 002 - Lines) – For Project 001 - Activity 001
  - Task resource transaction 001 - Labor cost to galvanize lines.
  - Task resource transaction 002 - Galvanizing material cost.

Work Order 002 - Add to power lines.

Work Order task 001 - Add lines (Asset 002 - Lines) - For Project 001 - Activity 001

- Task resource transaction 001 - Labor cost to install new lines.
- Task resource transaction 002 - Material cost of new poles.

For Project Costing-managed projects, if PeopleSoft Program Management (PGM) is installed, Project Costing uses the Resources by Activity page, which appears in PeopleSoft Program Management and Project Costing, to plan a project activity and assign specific or generic labor, material, and asset (tool) resources. If PeopleSoft Program Management is installed, you can create a work order from PeopleSoft Program Management or Project Costing, and select the resources that you want to add to the work order.

When doing project planning, project managers need to see the project demand for all of the resources. In some cases, project managers plan for resources by using placeholder resources, which are called generic resources. They will replace these generic resources later with named resources. To accomplish this, project managers use PeopleSoft Program Management to capture budget and resource needs for projects. In turn, they create work orders to manage individual activities at a more detailed level. You can assign generic labor and asset (tool) resources to an activity associated with a work order created from Project Costing and copy those resources to the Requirements page of the task associated with the activity. You specify the craft code for a generic labor resource and specify the asset type, subtype, manufacturer ID (optional) , and model (optional) for generic tool resources.

Users select Other or Material as a Resource Class to add generic Purchase/On-Hand materials. You must select specific values for PeopleSoft Inventory items and Purchase/On-Hand items that appear on the item list and are not considered generic resources. An icon appears next to the resources that you already added to one or more work orders that were created for the activity to help avoid duplication. When you create the work order, the selected items are copied to the Labor, Inventory, Purchase/On-Hand, or Tools Schedules grids on the Schedules page of the work order. Labor and tools are also copied to the Requirements page of the work order.

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This table describes the resource data that is copied to the work order:

Resource Class	Named or Generic	Resource Category in Work Order	Fields Passed to the Work Order
Labor	Named	Labor	Specified Resource Name **Cost /Bill Rates, Currency, and Craft. If UOM is in Days, then must convert Assigned Work to hours.
Labor	Generic	Labor	Craft, **Cost /Bill Rates, Currency, Sched. Start/ End Dates, Units (Assigned Work). If UOM is in Days, then must convert Assigned Work to hours.
Asset	Named	Tools	Asset Type, Asset Subtype, Manufacturer ID, Model, **Cost / Bill Rates, Currency, UOM, Units.
Asset	Generic	Tools	Asset Type, Asset Subtype, Manufacturer ID, Model, **Cost / Bill Rates, Currency, UOM, Units.
Material	Named (Inventoried)	Inventory	Specified Inventory Item **Cost Rate, Currency, UOM, Units
Material	Named (Noninventoried)	Purchase/On-Hand	Specified Noninventoried Item, **Cost Rate, Currency, UOM, Units
Material	Generic	Purchase/On-Hand	Resource Name, **Cost Rate, Currency, UOM, Units
Other	Generic	Purchase/On-Hand	Resource Name, **Cost Rate, Currency, UOM, Units

Important! ** All rates must be converted to the Work Order Business Unit base currency when being passed to the WO Component Interface.

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PeopleSoft Program Management also enables the creation of resource pools to associate with projects and activities. Resource pools are set up in PeopleSoft Resource Management for use in PeopleSoft Program Management and Project Costing. The resources that are assigned to resource pools must be set up as resources in both PeopleSoft Resource Management and PeopleSoft Maintenance Management. These resource pools establish a limit on the resources that can be assigned to a project. You must indicate that you want to enforce the use of resource pools either at the project level or at the project activity level in the Project Costing business unit options or on the Project Costing General Information page. PeopleSoft Maintenance Management users can indicate in the work order business unit that they want to establish work order access security using resource pools. When you associate either a Project Costing-managed or work order-managed work order with a project or activity that has resource pools set up, the system allows the resources that are assigned to a resource pool to access a work order task to enter time in the Technician Workbench and create express work orders.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Integrating with Maintenance Management".

See *PeopleSoft Enterprise Program Management 9.0 PeopleBook*, "Scheduling and Managing Resources".

If PeopleSoft Program Management is not installed, Project Costing uses the Project Costing, Activity Definitions, Team, Team Detail page to plan a project activity and assign only labor resources, because Project Costing does not allow the assignment of materials and tools. When you create a Project Costing-managed work order in Project Costing, you can copy these labor resources to one or more work orders in PeopleSoft Maintenance Management. The labor resources that you copy must already be set up as resources in PeopleSoft Maintenance Management. You select the resources that you want to copy to the work order and click the Create Work Order button on the Project Costing, Activity Definitions, Team, Team Detail page. You select the resource rows that you want to copy to the work order, identify some basic information about the work order, and click OK. The system copies any labor resources that you select in Project Costing to the labor resource fields of the work order task.

Important! Resources can be copied only from PeopleSoft Program Management or Project Costing to a work order that is associated with a Project Costing-managed work order. You cannot copy resources that are set up in Project Costing to a work order that is associated with a work order-managed project.

When you create a work order from Project Costing, you must select a work order business unit, work order type, service group, and shop. The number of work order business units that are available for selection is based on how many of the work order business units are mapped to the Project Costing business unit that is associated with this project. Other attributes that are brought over to the work order include the Project Costing business unit, the project ID, the activity ID, the selected labor resources, and the activity start and end dates. You can associate a work order task with only one project and one activity. However, the same project and activity combination can be applied to many different task lines on many different work orders.

You can also associate an existing Project Costing-managed project activity to a newly created work order task. In this case, only the project ID and the activity ID for the project are used from Project Costing. You cannot bring over resources from Project Costing using this method. You can associate a work order with only one project at a time.

Note. All accounting rules that are set up in PeopleSoft Project Costing and work orders that are associated with a Project Costing-managed project are not affected by the work order Close process.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Integrating with Maintenance Management," Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," Integrated Product Setup Considerations, page 57.

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Work Order Creation for Work Order-Managed Projects

A work order-managed project is a behind-the-scenes project that enables PeopleSoft Project Costing to collect, report, track, and account for costs that are incurred for work orders and work order tasks. The important difference here is that work order-managed projects are not actively managed in Project Costing. Instead, the work order drives the processing for a work order-managed project by dictating the accounting rules (capitalization and chargebacks) for these projects. Typically, users create work orders in PeopleSoft Maintenance Management in response to emergency, reactive, or preventive maintenance needs, and PeopleSoft Maintenance Management and Project Costing work together to automatically associate each new work order with a work order-managed project and the project's activities. To facilitate this process, you establish in Project Costing a very basic work order-managed project that you do not intend to actively plan and manage using Project Costing. To establish that this is a work order-managed project, you select the Work Order Managed check box on the Project Costing Definition General Information page. All of the planning for a work order-managed project occurs in the work order.

With work order-managed projects, PeopleSoft Maintenance Management automatically generates activities to collect, pool, and account for the costs of each work order task. You can associate a work order task only with one work order-managed project and activity. When you create a work order, a default value for the project ID appears in the work order and for each work order task that you create. PeopleSoft Project Costing generates a new activity automatically if the project is work order-managed.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Creating and Maintaining Projects," Understanding Projects.

Work Order Processing for Work Orders Associated with Project Costing Projects or Work Order-Managed Projects

Whether you intend to create work orders that are based on Project Costing-managed projects, work order-managed projects, or both, you must set up the following features in Project Costing:

- A Project Costing business unit.
- Project Costing rate sets and rate plans from which the Project Costing Pricing process creates cost, billing, and revenue rows.

  You select existing rate sets and rate plans for work order-managed projects. A rate plan is a collection of rate sets that the system applies in a specified order. Use rate plans to link rate sets so that priced rows from one rate set are used to create additional priced rows from the next rate set. For example, you can add additional expenses, such as administrative costs or overhead, to cost transactions before they are priced for billing or revenue.
- PeopleSoft Project Costing accounting rules if you want to process chargebacks for selected tasks.
- PeopleSoft Project Costing express asset filters if you intend to perform asset capitalizations and retirements.

In addition, you set up capitalization rules in PeopleSoft Maintenance Management to define a minimum capitalization limit. The minimum capitalization limit is processed before Project Costing can capitalize the selected costs to an asset. You also select a project's default adjustment filter and retirement filter to apply to work order costs. These two filters are originally set up in Project Costing.

In PeopleSoft Maintenance Management, you define a Project Costing ChartField mapping to enable Project Costing ChartField default values to appear in the distribution line for a work order task. You can override these values at the work order task distribution line level before completing a work order task. These Project Costing ChartFields, along with the accounting ChartFields, are carried over to the points of cost entry and feeder systems, which are labor time entry and tools usage entry in PeopleSoft Maintenance Management, and the PeopleSoft Inventory, PeopleSoft Payables, and PeopleSoft Purchasing systems.

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Once you create a work order for either a Project Costing-managed project or a work order-managed project, you can schedule labor, material, and tool resources in PeopleSoft Maintenance Management. Technicians can perform the work, and authorized users can record labor, tools, and material usage in the Technician Workbench. These PeopleSoft Maintenance Management transactions are sent to each of the feeder systems, which may include PeopleSoft Purchasing for material resources out of stock and contracted labor resources, and PeopleSoft Inventory for inventoried material resources. The labor transactions share the PeopleSoft Payables time capture tables and processes, and the tools transactions are staged to go directly from PeopleSoft Maintenance Management to Project Costing. Project Costing contains cost collection application engines to pull the transaction records from the various feeder systems through to Project Costing. Actual costs are gathered from PeopleSoft Inventory, PeopleSoft Purchasing, PeopleSoft Payables, PeopleSoft Payables, and PeopleSoft Maintenance Management for the Tools costs. Committed costs can be pulled from any requisitions or purchase orders into Project Costing. These application engines are used to collect these costs:

- PC_EX_TO_PC collects labor cost from PeopleSoft Payables.
- PC_AP_TO_PC collects material costs from PeopleSoft Payables.
- PC_IN_TO_PC collects material costs from PeopleSoft Inventory.
- PC_PO_TO_PC collects material costs from PeopleSoft Purchasing.
- PC_WM_TO_PC collects tool usage costs from PeopleSoft Maintenance Management.

The project pricing engine reads the project activity rate set and rate plan and each transaction from the feeder system, and inserts the target priced transaction into the PS_PROJ_RESOURCE table along with the work order business unit, work order ID, work order task ID, work order resource type, and work order line number. The rate set and rate plan for a work order that is associated with a work order-managed project is selected at the work order business unit level or the shop level and can be overridden from the work order on the work order task accounting page.

For the labor hours that are entered in the Technician Workbench for work orders that are associated with a work order-managed project, PeopleSoft Maintenance Management defines hourly rates for each work order task labor resource line. Project Costing has two labor rate options specifically for work orders, which are *WBI* (work order labor bill rate) and *WCO* (work order labor cost rate). An analysis is performed by Project Costing, and the Project Costing Pricing engine reads the Project Costing activity rate set and finds the rate option. If the rate option is set to *WBI* or *WCO,* the pricing engine gets the billing rate or cost rate, respectively, for the resources from rates that you set up in PeopleSoft Maintenance Management.

For the tools usage hours that are entered in the Technician Workbench for work orders that are associated with a work order-managed project, PeopleSoft Maintenance Management defines tool rates for each work order task tool resource line. Project costing has two tool rate options, which are *TCO* (tools cost rate) and *TBI* (tools bill rate). An analysis is performed by Project Costing, and the Project Costing pricing engine reads the Project Costing activity rate set and finds the rate options *TBI* or *TCO*. The pricing engine gets the billing rate or cost rate, respectively, for the tools usage data from the rates that you set up in PeopleSoft Maintenance Management.

For work order managed projects, after pricing the work order transaction, the Pricing engine sets the GL distribution status (GL_DISTRIB_STATUS) to *hold* until the work order task is closed in PeopleSoft Maintenance Management. Once the work order task is closed, the GL distribution status is set to *costed* so that the accounting engine can process each transaction row.

The difference between processing a work order that is associated with a work order-managed project versus a Project Costing-managed project occurs when a work order task is closed. In a work order that is associated with a Project Costing-managed project, asset capitalization and chargeback amounts are updated for the project on a continuous basis until the work order task is closed. However, for a work order that is associated with a work order-managed project, the asset capitalization and chargebacks are not updated in PeopleSoft Project Costing until the work order task that is associated with the work order-managed project is closed.

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Note. A Project Costing-managed project cannot switch to a work order-managed project, and a work order-managed project cannot switch to a Project Costing-managed project.

PeopleSoft Maintenance Management Integration with PeopleSoft Purchasing and PeopleSoft Payables

PeopleSoft Maintenance Management integrates with PeopleSoft Purchasing and PeopleSoft Payables to enable you to:

- Set up requirements and determine estimated costs based on materials and services that you need to purchase.
- Copy these requirements to a schedule and add other materials and services that you want to purchase to the schedule.
- Select each row in the schedule and load it directly into the requisition or purchase order staging processes.
- Select noninventory parts from an equipment parts list (EPL), if available for the asset that is selected for the work order task asset.
- Determine the availability of noninventory parts based on pegged purchase orders or requisitions.
- Access PeopleSoft Purchasing to create a purchase order or a requisition and tie it back to the associated work order using the work order key values (business unit, work order ID, task, and resource line).
- Track the procurement transaction's progress by reviewing the status, which appears in the work order's schedule, as well as reviewing the Purchasing and Pegging inquiry.
- Run and analyze a Work Order Task Material Readiness report to resolve any delays in material availability of noninventory materials between the scheduling and the start of work.
- Identify noninventory or open description resources within the requirements or schedules that are already *on-hand,* including items that you have already purchased and have at your disposal for use on a work order.

  The parts that you identify as *on-hand* in the requirements and schedules inform the technician who is performing the work on the asset that the one or more on-hand parts are readily available for use on the task.

In addition, you can enter requisitions and purchase orders directly in PeopleSoft Purchasing, and enter vouchers in PeopleSoft Payables that can reference a work order business unit, work order ID, and resource type if the resource was not originally scheduled in the work order. Costs for these items are pulled back into the work order and flow down to the actual resource row.

PeopleSoft Maintenance Management Integration with PeopleSoft Inventory

You can integrate PeopleSoft Inventory with PeopleSoft Maintenance Management when you want to use inventoried items to maintain or repair an asset. If you do not install PeopleSoft Inventory, the PeopleSoft Inventory-related fields do not appear in the work order. If you choose to install PeopleSoft Inventory, you can determine the inventory item requirements and estimated costs for materials that are required to complete a work order task.

A scheduler can copy these requirements to a schedule, as well as select additional items to schedule for each work order task. You can select from two item types, *inventory* and *floor stock.* An inventory item type indicates that the item is available from Inventory. Floor stock typically indicates that a shop has a low-cost, often-used part or item that shop supervisors keep in their shop, which can be added to the work order if needed. Floor stock items are not rolled up into the task or work order estimated costs and scheduled costs because these items were already procured through a normal purchase order outside of the work order.

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After selecting an inventory item for a task, a scheduler can select an Item Availability button to determine whether an inventory item is available on a specified future date, and to determine the quantity that is available. If the item is unavailable, the system indicates the reason that it is unavailable. A scheduler can also access the Availability inquiry, the Item Balance inquiry, or both to determine whether enough quantity is on hand based on the demand by the work order. If the quantity of an item does not meet the demand of the work order, the scheduler can determine the earliest date that the item will be available. This information enables the scheduler to determine the best dates on which to start and end the work order task.

The scheduler can also go to the Pegging Workbench to determine whether any incoming supply exists for the particular item, which, at the time that the work order is being scheduled, might not have sufficient quantities to fulfill the work order. The work order places demand on this incoming supply, which assures that the items are received for the work order based on this demand.

A scheduler can commit and reserve quantities of inventory items from the work order task to ensure that the inventory quantity is available on the scheduled start date of a work order. You must set up a combination of commit and reservation rules at the business unit level, the shop level, or the work order type level in the shop. You must commit all items before they can be reserved. However, based on the way that you set up these rules, you can perform both activities at the same time if your commit and reservation rules dictate. In addition, an authorized user can override these rules to immediately reserve an inventory item by selecting the Reserve button.

The PeopleSoft Inventory commit rules are:

- Commit at Reserve.
- Parts List Creation.
- Pick Plan Creation.
- Work Order Status Change.

The work order reservation rules are:

- Batch Reserve only.
- Parts List Creation.
- Pick Plan Creation.
- Work Order Status Change.

The various combinations of these rules determine when you can reserve the item. These combinations are described in the description of the Integrations page of the work order business unit.

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Work Order Business Unit Integration Options, page 88.

Once the scheduler selects the items to use for the work order task, the commit and reservation rules are enforced in the PeopleSoft Inventory system based on either the generation of the parts list (when the work order is saved), the generation of a pick plan, or a change of the work order to a specified status. The commit method is identified in the work order business unit, shop definition, and shop/type levels. The scheduler can track the commitment status of an item, whether an item was generated on a pick plan, any quantities of an item that were issued to the work order, the current quantity of the item that is available in inventory, and the pegging status of an item.

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If an EPL is available in PeopleSoft Asset Management, you can select the items that are associated with the asset that is being maintained or repaired from the list when defining the inventory requirements or scheduling the inventory in the work order task. You can also provide the PeopleSoft Inventory system with delivery instructions when you define the requirements or the scheduler schedules the items for the work order task. During work order execution, the technician gathers inventory items based on the delivery specifications, orders additional items (if necessary), returns any unused items, and records used quantities in the Technician Workbench.

Because a variety of events can occur that may negatively affect the availability of inventory items between the scheduling and the actual start of work, a planner or scheduler can check the availability of specific items that are selected for a work order task by clicking the Item Availability button on the Schedules page of the work order. To manage and track the availability of items that are selected for a number of work orders, the planner or scheduler can run the Work Order Task Material Readiness report frequently. Based on this report, the planner or scheduler can return to a specific work order and research and resolve individual availability issues.

All of the costs for the items that are used and returned to stock for the work order are processed in PeopleSoft Inventory, sent to the Project Costing system, and updated for tracking purposes in PeopleSoft Maintenance Management.

Inventory personnel can also issue inventory directly to a work order by using the inventory issues command in the Inventory, Fulfill Work Orders, Issue to Work Orders component. The system directly issues inventory items to a work order without setting up and defining requirements and schedules in the work order. This is applicable for urgent work orders or in a situation in which a work order is not scheduled. In addition, users can also generate a pick plan or schedule the Pick Plan process to run as needed or on a scheduled basis, such as every four hours, nightly, and so on. The Pick Plan process that is available in the PeopleSoft Inventory system provides more options to enable you to request pick plans for a batch of work orders. A technician, with the proper authorization, can also generate a pick plan and issue inventory from the Technician Workbench in PeopleSoft Maintenance Management.

Important! Direct inventory issues to a work order are not calculated into Scheduled Costs of the work order. They are considered actual costs once the batch costing processes are run.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Fulfilling Work Orders from Maintenance Management,” Selecting Picking Plans or Work Orders to Issue.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Fulfilling Work Orders from Maintenance Management,” Generating a Work Order Pick Plan.

PeopleSoft Maintenance Management Integration with PeopleSoft ALM Portal Pack

PeopleSoft Maintenance Management provides pagelets that enable operation managers, planners or schedulers, and technicians easy access to the data that is needed to effectively manage service requests, work orders, and work order tasks.

See *PeopleSoft Enterprise Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs 9.0 PeopleBook*, “Using PeopleSoft Asset Lifecycle Management Portal Pack”.

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PeopleSoft Maintenance Management Integration with PeopleSoft Program Management

If you use PeopleSoft Program Management along with Project Costing, you can create a work order that is associated with a Project Costing-managed project from PeopleSoft Program Management. Once you create the work order, you can create work order tasks, define resource requirements, schedule resources, and execute the work order similar to any other work order.

If PeopleSoft Program Management is installed and a work order is created from PeopleSoft Program Management or Project Costing, users can assign generic and named labor, materials, and tool resources to a work order that are established for a project in PeopleSoft Program Management. PeopleSoft Program Management also enables users to create resource pools, which consist of specific employee IDs, and associate one or more resource pools with a project and a project's activities. The employees in a resource pool can charge time against the project and its activities. Because activities are tied to work order tasks, resource pools that are set up in PeopleSoft Program Management enable you to set up work order access security for work order tasks in PeopleSoft Maintenance Management. In other words, only employees who are specified in a resource pool for a project and project activity can access and charge time to the associated PeopleSoft Project Costing managed work order task. Work order access security for resource pools can work together with work order access security for shops to determine the technicians who can charge time to a work order task in the Technician Workbench. You set up the type of work order access security that you want to use in the work order business unit.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Work Order Business Unit Setup, page 75.

PeopleSoft Maintenance Management Integration with PeopleSoft CRM and Third-Party Help Desk Applications

The Asset Repository Manager (ARM) stores the asset data for all ALM products. This asset data can be shared across PeopleSoft Enterprise CRM, FMS (Financial Management System) , SCM (Supply Chain Management), and PeopleSoft HCM (Human Capital Management) suites and with third-party applications. PeopleSoft Maintenance Management uses PeopleTools Integration Broker to integrate with PeopleSoft CRM Help Desk and third-party help desk applications. When a help desk agent receives a call or a self-service notification that involves a problem that the agent cannot resolve without the intervention of one or more technicians, the agent can create a work order directly from the help desk application. The help desk application can access the assets in PeopleSoft Asset Management and the problems in PeopleSoft Maintenance Management to create a work order with the appropriate shop, type, service group, and priority that are set up in PeopleSoft Maintenance Management. The help desk application maintains a history of all transactions that are sent to PeopleSoft Maintenance Management.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," PeopleSoft CRM Help Desk 8.9 and Higher and Third-Party Help Desk Application Setup Considerations, page 61.

See Chapter 14, "Creating a Work Order," Work Order Creation from Help Desk Applications, page 377.

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PeopleSoft Maintenance Management Integration with Condition-Based Monitoring Systems

External condition monitoring systems measure and analyze current readings on equipment and determine whether the condition of the equipment is outside of normal operating parameters. When the condition is outside normal operating parameters, an alert, which is created manually or in real time, triggers a Web Service request from the condition monitoring system to PeopleSoft Maintenance Management. When PeopleSoft Maintenance Management receives the condition-based alert from the external condition monitoring system, it notifies a condition-based maintenance coordinator, who investigates the problem and creates a standard or preventive maintenance work order. PeopleSoft Maintenance Management tracks the life-cycle status of the alerts for an asset.

See Chapter 11, "Setting Up and Using Condition-based Maintenance," page 271.

PeopleSoft Maintenance Management Integration with PeopleSoft Resource Management

PeopleSoft Maintenance Management shares pages and tables with PeopleSoft Resource Management, an application that provides calendars and profiles for labor resources, schedule management for labor and tool resources, and a search engine to help identify the most qualified or applicable labor and tool resources to perform work. You are not required to install PeopleSoft Resource Management to use PeopleSoft Maintenance Management. Three primary methods are available to enter person data into the software from which to create resources in PeopleSoft Maintenance Management. These methods include:

- Synchronizing the PeopleSoft Enterprise Human Resources Management System (HRMS) database, which provides key employee data, with your Financials Supply Chain Management database using the PeopleTools Integration Broker technology and the standard application messages that are delivered with the two databases.

  You must install PeopleSoft HRMS to use this method.

- Entering employees directly in the Financials Supply Chain Management (FSCM) database using the Manage Employee Data component in PeopleSoft Maintenance Management.

- Using the PeopleTools Integration Broker technology and the standard subscription application messages that are delivered with the FSCM database to receive data in XML publications from a third-party human resources database.

  This requires some custom development work to extract data from the third-party human resource management system and publish the data in the XML format that is required by the subscribing message in the FSCM database.

Regardless of which path you select, you must identify in PeopleSoft Maintenance Management the subset of labor resources that you are going to use as technicians to perform the work order tasks. In PeopleSoft Maintenance Management, you:

- Must assign each technician to one or more shops.
- Can optionally make a technician a member of a crew
- Can individually identify the primary and secondary crafts for each technician.
- Can specify the detailed qualifications of each technician.

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The shop controls many of the default values that appear in the work order. You can define labor requirements based on the craft and determine estimated costs for each labor resource in the work order task. The scheduler can copy these requirements, if desired, to perform detailed scheduling and assign named resources to a work order task. The scheduler has four different methods to assign a labor resource or tool to a work order task, which include:

- Clicking the Recommend Labor button or the Recommend Tools button to use a Search engine that recommends both qualified and available resources.
- Performing a manual search through labor resources and tools to identify an appropriate available resource.
- Directly specifying the employee ID of the resource or asset ID on the task line.
- Directly specifying the employee ID or performing the Assign Resource action on the Labor Assignment Workbench.

Optionally, you can set up an approval process for labor resources that requires a technician's supervisor to approve an assignment before the technician is officially assigned to a work order task. Such approvals are usually required for technicians who are assigned to one shop, but are selected to work on a work order that is associated with a different shop. Approval is normally required by the supervisor of the technician's assigned shop.

When labor resources and tools are assigned and scheduled, the system updates the calendar of the technician or the tool. If you indicate that you want to update the resource calendar in the shop that is associated with the work order, then the calendar is updated to reflect the actual end date for the assigned task when the work order task status is changed to *complete* ahead of schedule. Technicians can access their own calendars, which identify work order task assignments and nonwork order appointments, by clicking a link on the Technician Workbench. As work order tasks are performed, the technician can use the Technician Workbench to enter the exact time that the resource worked on each work order task. If a resource completes a task early or the task is canceled, the resource becomes available for assignment to other tasks.

PeopleSoft Maintenance Management Integration with PeopleSoft Time and Expense Functionality

PeopleSoft Maintenance Management shares pages and tables with PeopleSoft Payables, an application that enables you to record actual time that is worked by technicians. You are not required to install PeopleSoft Payables to use PeopleSoft Maintenance Management. Technicians or administrators can record the actual time that was expended on a work order task on behalf of technicians using the Technician Workbench. They can enter time on a daily, biweekly, weekly, and semimonthly basis. The time entry records that technicians enter, which are preapproved and include a sequence number that is associated with the total hours that are spent or the start and stop times per work order, task and date, and reporting period, are staged within PeopleSoft Maintenance Management and then loaded into the tables that are shared with the PeopleSoft Payables system at save or submit time using a component interface. The user runs two application engine programs. The first one packages the time records into an PeopleSoft Payables staging table, and the second one sends the data to Project Costing, where the labor costs are calculated by multiplying the quantity of hours by the labor cost rate and labor bill rate that are associated with the business unit, shop, or craft that is set up in PeopleSoft Maintenance Management.

See *PeopleSoft Enterprise Expenses 9.0 PeopleBook*, "Setting Up Approvals and Audit Rules," Understanding Setting Up Approvals and Audit Rules.

Microsoft Project

Users can export work order schedule data, with the exception of crew schedules, and preventive maintenance projection data to Microsoft Project for further analysis and scheduling.

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Users can import work order data that was exported to Microsoft Project from PeopleSoft Maintenance Management. However, this data does not include preventive maintenance projection data or crew schedule data.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Exporting Preventive Maintenance Projections and Work Orders with Microsoft Project, page 343.

PeopleSoft Maintenance Management Setup

Setup for PeopleSoft Maintenance Management includes not only the setup of data that you use specifically for PeopleSoft Maintenance Management, but also the setup of data for other products, such as PeopleSoft Asset Management, PeopleSoft Project Costing,PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Inventory. You must use the appropriate PeopleBook to perform those setups.

The setup procedures that you perform specifically for PeopleSoft Maintenance Management include:

- Installation options.

  Installation options enable you to indicate that you want to install PeopleSoft Maintenance Management and other integrated products.

- User preferences.

  User preferences determine the access and privileges that you want to provide to specific user roles and not to others.

  Note. You must also set up the roles in PeopleTools along with any additional security.

- SetIDs.

  SetIDs segregate control data that can apply to more than one work order business unit.

- Work order business unit.

  Work order business units control the functionality, default data and hierarchies, and product integration information that is needed to create and generate work orders.

- Service request business units.

  If you use service requests in your organization, define the default data that you require to create service requests.

- Work order types.

  You must apply one work order type to a work order when you create it. Work order types enable the segregation of work orders into specific categories, such as preventive maintenance, corrective maintenance, and capital improvements, based on your organization's approach to classifying work.

- Service groups.

  You must apply one service group to a work order when you create it. Service groups enable the grouping of work orders based on the grouping of the assets on which work is being performed, such as facilities, ITAM (information technology equipment in PeopleSoft Asset Management), and fleets.

- Shop.

  The system requires shop information when you create a work order. Shops group and manage the labor and tool resources that are defined in the work order.

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- Priority.

  The system administrator determines the number and names of priority codes. You must set the priority when you create a work order, which enables you to sort and track work orders based on their level of importance.

- Status.

  You must set up statuses separately for service requests and work orders. Statuses are necessary for determining the functionality that users can perform at various stages in the progression of a service request or work order. Users define their own statuses based on their organization. However, when they set up these statuses, they associate them with system-defined statuses:

  - Service request internal statuses include *canceled, closed, complete, open, work in progress,* and *work order created.*
  - Work order internal statuses include *awaiting schedule, canceled, closed, complete, on hold, open, scheduled,* and *work in progress* and can apply to both work orders and work order tasks.

- Maintenance type.

  Maintenance types are user-defined and are used to divide service maintenance procedures into specific categories, such as MAJOR, MINOR, REBUILD, and TUNEUP. They are set up in PeopleSoft Asset Management. However, in PeopleSoft Maintenance Management, you associate maintenance types with a specific asset type and asset subtype. This is necessary because when a user adds a new PM Schedule and selects a Maintenance Type for the schedule, the asset type and subtype that are specified in the Maintenance Type definition must match the asset type and subtype that are associated with the asset that is specified when a user creates a PM Schedule. In addition, when a user adds a new PM Loop Schedule and selects a maintenance type, the asset type and subtype in the maintenance type must match the asset type and subtype that are specified in the Maintenance Loop definition.

  Note. Setting up maintenance types by asset subtype is optional.

- Downtime reason.

  Users can set up reasons for an asset being down based on a work order. They enter the downtime for the asset in the Downtime Entry component and select a downtime reason. Users can access the Downtime Entry component from a link in the Technician Workbench on the Task Actuals Dates/Times tab and a link in the Asset Information group box on the Requirements page and Schedules page of the Work Order component.

- CBM rule setup.

  Users set up the rules to enable the creation of condition-based maintenance (CBM) work orders based on alerts that are sent from a condition-based monitoring system, which monitors the condition of an asset.

Other data setup categories for PeopleSoft Maintenance Management include:

- Labor resource data:
  - Task categories
  - Crafts
  - Shifts
  - Crews
  - Schedule patterns and periods
  - Crew rescheduling reason codes

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  - Options

    You set up these categories under the PeopleSoft Maintenance Management business unit category if you want to set up labor resource approval workflow.

- Common resource setup and data:
  - Competencies
  - Holidays
  - Competency types
  - Degrees
  - Holidays
  - Honors/awards
  - Languages
  - Licenses/certifications
  - Majors
  - Memberships
  - Rating model
  - Job codes
  - Schools
  - Tests
  - Resource Search Configuration for resource cache administration.
- PCR (problem, cause, and resolution) data:
  - Problem codes
  - Cause codes
  - Resolution codes
  - Problem groups
  - Problem trees, which are related only to service request and help desk data, and not to work orders.
- Accounting and cost data:
  - Work order business unit, which enables you to define the Project Default Order and the Accounting Default Order based on weighting calculations.
  - Associate projects

    You can associate both work order-managed and Project Costing-managed projects with a work order business unit and the Project Costing business unit that is defined in the work order business unit. The Project Default Order that is specified in the work order business unit determines the default project in the work order.
  - Capitalization rules.

    You set up a capitalization minimum for asset categories and assign the asset capitalization filter for assets that are used in a work order.

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- Default PC (Project Costing) ChartFields.

  Map Project Costing ChartFields to each integration module.

  The Project Default Order that is set up in the work order business unit determines which Project Costing ChartFields appear as default values in the work order.

- Distribution templates.

  Distribution templates specify the ChartField distribution combinations for each type of cost that can be incurred by a work order. The ChartField combinations are identified for each combination of integrated PeopleSoft Enterprise application and resource type.

- Distribution template rules.

  Distribution template rules identify which distribution template that the system uses when loading default ChartField values to a work order task. You can specify the rules regarding how the system selects a distribution template by associating the distribution template with a combination of eight key criteria. You set up the Accounting Default Profile in the work order business unit, which determines the values that are supplied by default in the work order.

• Work order template data:

  - Work order task templates

    These templates enable you to predefine craft, inventory item, purchased and on-hand items, and tools resource requirements that are needed to complete a work order task. In addition, this template can contain instructions, checklists, notes, and attachments that help the technician perform the task. These templates are set up by setID and can be shared across business units. You can associate them with asset classifications (asset type, subtype, manufacturer ID, and model) and identify effective dates to enable data changes over time. You can also associate a template with a resolution code to streamline the search for templates that are applicable to a particular problem/cause/resolution group. Setting up these templates and applying them to a work order for common work order tasks can reduce significantly the time that you spend creating work orders.

  - Work order job templates

    These templates are defined for work orders and are attached to preventive maintenance work order schedules. They consist of one or more job steps that are associated with work order task templates. Work order job templates are also set up by setID to enable sharing across business units. You can associate them with asset classifications (asset type, subtype, manufacturer's ID, and model). They are also effective-dated to enable data changes over time. You can associate them with a resolution code to streamline searches.

• Supplemental data.

  Because every organization has different data requirements for work orders based upon unique business processes and regulatory issues, PeopleSoft Maintenance Management includes the Supplemental Data component to provide a way to define additional work-order related data.

  See Chapter 24, "Using Supplemental Data," page 653.

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Additional Labor Setup Considerations

Before you can assign work to your technicians, you must create them as resources and perform other labor administration activities using the Labor Administration options in PeopleSoft Maintenance Management. This is where you can update person information and qualification profiles, but most importantly, you activate certain people, which may be based on a list of employees from PeopleSoft HRMS or on nonemployees and employees whom you establish in the PeopleSoft FSCM database directly from PeopleSoft Maintenance Management as resources using the Create Resources process. You can run this process for individuals or for a group of people. Once you have activated these individuals as resources and run the Cache Administration process to refresh the resource eligibility cache table as necessary, you can assign them to resource groups to enable you to use the search engine when you are scheduling resources for a work order. (The search engine determines resource availability and qualification with respect to each work order task.) Once you have set up labor resources, you can maintain their eligibility, assign them to a craft, and manage their profiles using the Labor Administration menu in PeopleSoft Maintenance Management.

Tools Setup Considerations

You can also create resource groups for the assets that are used as tools and use the search engine to identify available and appropriate tools for specific work order tasks. You specify certain assets as tools in PeopleSoft Asset Management. You must set up the shop and identify the Asset Management business unit and asset classification parameters for assets, which are selected as tools in the work order task, where you can access the asset's calendar. The system uses shop information of the asset to determine the asset's availability based on the operating hours of the shop. The operating hours of the shop determine the availability of the tools.

PeopleSoft Inventory Setup Considerations

If you intend to use the PeopleSoft Inventory system to identify items that are required to perform a work order task, item setup in PeopleSoft Inventory is very important for PeopleSoft Maintenance Management. You must set up items and their attributes, as well as the relationship between items and the PeopleSoft Inventory business units. Item setup involves such things as units of measure, identifying floor stock items, and so on.

You identify the default PeopleSoft Inventory business unit on the Integrations page of the work order business unit. You also set up commit and reservation rules on this page.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," PeopleSoft Inventory Setup Considerations, page 60.

See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Defining Items by Business Unit".

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Defining Your Operational Structure in PeopleSoft Inventory".

PeopleSoft Purchasing Setup Considerations

To use PeopleSoft Purchasing to obtain noninventory and open description items, you must define the requisition and purchase order defaults that are required for loading requisitions and purchase orders from PeopleSoft Maintenance Management. Requisition and Purchase Order Loader defaults require that the source business unit is defined and associated with a PeopleSoft Purchasing business unit. For each work order business unit for which you intend to procure noninventory and open description items, you must set up the appropriate requisition, Purchase Order loader business unit, or both to integrate with the PeopleSoft Purchasing product.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," PeopleSoft Purchasing Setup Considerations, page 60.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Understanding Requisitions".

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Understanding Purchase Orders".

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PeopleSoft Maintenance Management Work Order Creation

After setting up PeopleSoft Maintenance Management and other products that integrate with PeopleSoft Maintenance Management, you are ready to create work orders. You can use the following methods to create work orders.

- Work order creation from Service Request components.
- Work order creation from PeopleSoft CRM Help Desk 8.9 and 9.0, and third-party help desk applications.
- Work order creation from PeopleSoft Project Costing.
- Work order creation from PeopleSoft Program Management.
- Work order creation using the Express Work Order component.
- Work order creation using the Preventive Maintenance and Preventive Maintenance Projection processes.
- Work order creation using the CBM Alert component.
- Work order creation using the Work Order component.

The PeopleSoft Service Request Components

Employees and nonemployees can create a service request using either the PeopleSoft Employee Self-Service, Service Request wizard component or the Service Request component. Use service requests to log problems concerning a specific asset or a request for service. For example, an employee in an organization can create a service request for something as simple as replacing a light bulb in the employee's office or moving a piece of furniture. An employee can also create a more complex service request, such as requesting that a technician repair the hard drive on a computer. To enter a self-service service request, an individual needs a user ID, but does not need to be an employee.

When a person creates a service request, an agent is typically responsible for reviewing the request and determining the best method of solving the problem. If the agent or a technician can solve the problem with minimal effort, or if the organization does not want to schedule the resources and track the costs of performing the work, the agent or a technician can process the service request and close the service request when the work is complete. However, if the service request problem requires more complex planning, scheduling, and tracking, and needs to capture the costs, then the agent can create a work order to engage the maintenance organization.

A user can create a service request using one of two different methods:

- Service requests

  This method of entering a service request consists of a one-page form in which requesters enter the required type of service, how they prefer to be contacted, and optionally, the asset that needs repair. A manager or another individual can create a service request on behalf of the individual who is having the problem.

  The required types of service and the descriptive fields for the asset that needs repair depend on how you set up a problem tree. For example, if the problem tree is set up with a service type of *Repair a computer* and the asset field is set to *Serial ID,* an employee can create a service request to repair a computer and the system prompts the employee to enter the serial ID of the computer. The requester might also search for the asset by clicking the lookup icon, which displays a list of assets that meet the asset classification (asset type, subtype, manufacturer ID, and model) that are set up on the problem tree. Optionally, the user enters other relevant information, including any attachments that would be useful in solving the problem. In addition, you can configure supplemental data fields for a specific service type, such as adding a field to record the odometer reading of an automobile that needs repair, which more thoroughly describes the service request.

- Service request wizard

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This method of entering a service request is basically the same as the service request that was described previously except that the system guides you through a series of pages with one or two pieces of information in each page, rather than presenting the information in a one-page format. A summary page of the information that you entered is presented as the final page of the service request to ensure that you are ready to submit the request.

A user can review the status of a service request by accessing a My Requests component, which lists any service requests that are created by that individual. The user can access the actual service request, modify the contact information and add notes to the request, or review public notes that were added by an agent or technician.

After a user submits a service request, the service request is sent to the Service Request Inbox component in PeopleSoft Maintenance Management, where the agent can review the service request and request more information from the requester, if necessary.

The agent then performs one of these activities:

- Solves the problem and completes the service request.

  The service request is not officially closed until the system automatically notifies the requester that the work is complete and sends instructions for closing the service request. If the requester does not close the service request or notify the agent that a problem still exists, the service request is automatically closed after a configurable number of days.

- Assigns the service request to a technician to solve it.

  The agent can assign a service request to a technician, and the service request is reflected in the service request count link that appears on the Technician Workbench. The technician can then link to the service request, dialogue with the user, and indicate when the service request is complete.

- Creates a PeopleSoft Maintenance Management work order because the service request problem requires planning, scheduling, tracking of resources and costs, or the intervention of a maintenance technician to solve the problem.

  In this situation, after the agent creates a work order, a planner or scheduler can assign technicians to complete the work order tasks that are related to the service request problem. A technician can request more information from the requester, if necessary. After the work order is complete, the service request status is automatically set to *Complete* as well, and the system notifies the requester. If the requester is not satisfied with the work, the agent can create another service request and another work order. The service request is not officially closed until the system notifies the requester that the work is complete and sends instructions for closing the service request. If the requester does not close the service request or notify the agent that a problem still exists, both the service request and the work order are automatically closed after a configurable number of days.

Note. Even if a work order is open, an agent can manually close the service request that is associated with the work order. Closing the service request has no effect on the work order. Maintenance personnel can still complete the work and close the work order.

As long as a work order still has the status that was set initially when it was created, the agent or technician can cancel the work order directly from the Service Request page. Once the status changes to a noninitial status such as *Work in Progress* (WIP), the agent cannot cancel the work order from the service request. However, you can request that maintenance personnel cancel the work order. Canceling the work order automatically cancels the service request and notifies the requester.

An agent or technician can also create a service request in PeopleSoft Maintenance Management using the Agent Service Request component. An agent or technician might create this type of service request based on known problems that might affect many employees. For example, an agent might create a request to move the furnishings from one office to another for several employees. The agent can also create a service request for one person using this component.

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Details for the implementation of the work order are described later in the Work Order Component section.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," Work Order Creation Using the Work Order Component, page 40.

Work Order Creation from PeopleSoft CRM and Third-Party Help Desk Applications

You can use PeopleSoft CRM and third-party help desk applications to create a work order. When a help desk agent receives a call or a self-service notification that involves a problem that the agent cannot resolve without the intervention of one or more technicians, the agent can create a PeopleSoft Maintenance Management work order directly from the help desk application. The help desk can access the assets in PeopleSoft Asset Management and the problem tree, shops, and work order priorities in PeopleSoft Maintenance Management using the PeopleSoft Integration Broker. In addition, the help desk application maintains a history of all transactions that are sent to PeopleSoft Maintenance Management. When a help desk agent creates a work order, the system sends a series of messages between PeopleSoft Maintenance Management and the help desk application using the Integration Broker. The help desk initiates the first message to create a work order to PeopleSoft Maintenance Management. Then, PeopleSoft Maintenance Management responds by sending a message that contains the new work order number and the status. If the system fails to create a work order, then the response message contains the errors that are relevant to the failure.

Once PeopleSoft Maintenance Management creates the work order, the system notifies the help desk of key events, which include a change in the work order header status, a change in the work order description, or a request for additional information. A request for information is usually sent to the agent in an email containing an embedded URL. The Technician Workbench in PeopleSoft Maintenance Management indicates that the technician is awaiting a reply to this request. If the agent responds to the email through the URL, the Technician Workbench indicates that the agent replied to the email. A work order technician can also add a note and the agent can respond to the note within the work order without using email. After the work order is completed, the system updates the help desk application with the status change and notifies the agent of this status. If nothing else is necessary to complete the work order, the agent indicates that the problem is resolved and notifies the requester. If the requester is satisfied with the solution, then no further action is required. The agent can close a case without affecting the work order. The technician can manually close the work order or the work order will close automatically within a given time period. However, if the solution was not satisfactory, the requester can instruct the agent to keep the help desk case open. The agent might then respond by creating a new work order.

Work Order Creation from PeopleSoft Project Costing

You can create a work order directly from PeopleSoft Project Costing for any work orders that you want to associate with a Project Costing-managed project. Once you create the work order, you can create work order tasks, define resource requirements, schedule resources, and execute the work order the same as any other work order. However, all accounting rules are set up in the PeopleSoft Project Costing system and work orders that are associated with a Project Costing-managed project are not affected by the work order close process.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Integrating with Maintenance Management," Creating Work Orders and Work Order-Managed Projects in PeopleSoft Project Costing.

Work Order Creating from PeopleSoft Program Management

You can create a Project Costing-managed work order from PeopleSoft Program Management. You can copy labor, material, and tool resources to a Project Costing-managed work order when PeopleSoft Program Management is installed. Material resources can include inventory resources, as well as noninventory and open-text descriptions for Purchase/On-Hnad resources. You can add named and generic resources. You can also set up work order access security for resources that are set up in resource pools in PeopleSoft Program Management and are used by PeopleSoft Project Costing.

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See *PeopleSoft Enterprise Program Management 9.0 PeopleBook*, "Managing Programs and Projects," Establishing Programs and Projects.

Work Order Creation Using the Express Work Order Component

PeopleSoft Maintenance Management enables you to create a basic work order quickly using the Express Work Order component. The Express Work Order component requires these key pieces of information:

- Work order business unit.
- Work order ID.
- Work order type.
- Service group.
- Shop.
- Priority code.
- Description.
- Project ID.
- Activity ID.

Beyond these basic data elements, you can identify the asset to repair or maintain, its location, and the maintenance type. The default scheduler's name and ID are derived from the selected shop. When you identify an asset, you can access any work orders that were created for the asset and view any asset warranties that exist for the asset to ensure that you are applying the appropriate amount of maintenance to an asset that is covered by an active warranty. You can add attachments and record supplemental data values for the work order and, if desired, you can identify material resources to issue from PeopleSoft Inventory, to purchase, or to obtain from on-hand, noninventoried stock piles.

This Express Work Order component is especially useful for technicians who need to create a corrective work order in response to a preventive maintenance work order and for shops that perform very little detailed estimating and scheduling work. In fact, the system specifically provides the Originating Work Order field on the Express Work Order to identify the work order that triggered the work order from the user. The Show Resources button on the Express Work Order displays a grid for entering the material requirements and procurement and on-hand requirements because technicians often are the closest to the repair and know which materials are necessary to perform a particular repair.

If you set up work order access security in the business unit, only technicians who are assigned to shops that are specified on the Work Order Access page, which is accessed by clicking the Technician Work Order Access link on the Miscellaneous page of the work order, can search for express work orders.

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Work Order Creation Using the Preventive Maintenance and Preventive Maintenance Projection Processes

Preventive maintenance work orders are a common type of work order that are created for an organization. In PeopleSoft Maintenance Management, you set up a preventive maintenance schedule to maintain or repair an individual asset, a group of assets that you want to maintain or repair together (loop), or a location. You attach a work order job template to the schedule, which consists of a list of work order task templates. These templates define the work order tasks and the resource requirements for each task. You also set up the method that you want to use for scheduling the preventive maintenance and determining the preventive maintenance next-due date. These methods are set up as date-based, meter-based, or both. The meter-based readings can be based on a specific type of meter and a defined interval on calculations that are based on the number of sample days or sample readings using the PeopleSoft Asset Management Meter Reading History, or on calculations using the average reading from the PeopleSoft Asset Management Meter table. You can manage and edit PM schedules for each asset using the PM Schedule Workbench.

When you run the Preventive Maintenance process, it generates work orders depending on the way that you set up your preventive maintenance schedules. Once the work orders are created, you can access them using the Work Order component. The work order job template that you associated with the preventive maintenance schedule copies the data into each new preventive maintenance work order that the Preventive Maintenance process generates. If work order access security is set up for the business unit, the preventive maintenance process updates the shop on the Work Order Access page in the work order component. You can use the work order component to access the work order, add requirements, and schedule resources, if you want. If you indicate a scheduler on the work order, the work order appears by default in that individual's view of the Work Order Workbench. If you assign specific technicians to the work order tasks, when a specified technician accesses the Technician Workbench and searches for their tasks, the work order tasks that are assigned to that technician appear in the workbench. You can review all records that are generated by the PM and PM Projection Processes in the PM Workbench.

When you run the Preventive Maintenance Projection process, the system generates preventive maintenance work orders and next due dates. If you are satisfied with the next due dates, click the Create Work Order button, run the process again, and generate the actual work orders. The Preventive Maintenance Projection process will also create work orders based on a predetermined list of projections, which have their own due dates. If your organization schedules crews to perform work order tasks, you can click a link in the Crew Scheduling Workbench to access the PM Projection Summary page, which displays all projections for a selected crew and period.

You can export projections, along with existing work orders, to Microsoft Project for analysis and scheduling.

Note. The Preventive Maintenance process generates work orders that you can view and edit from the Work Order component.

Work Order Creation Using the CBM Component

A condition-based monitoring system monitors the condition of an asset. When the asset condition exceeds specified limits, it issues an alert to PeopleSoft Maintenance Management that the asset needs repair. An individual can also create an alert manually. The CBM coordinator reviews the situation and can create a work order to repair the asset. If the asset is associated with a PM Schedule, the coordinator updates the PM Schedule that is associated with the asset and the Preventive Maintenance process generates a work order.

See Chapter 11, "Setting Up and Using Condition-based Maintenance," page 271.

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Work Order Creation Using the Work Order Component

You can create a new work order or maintain an existing work order using the Work Order component in PeopleSoft Maintenance Management. The Work Order component is the vehicle that enables you to access any work orders that were created using any of the previously listed methods. When you create a work order, you must enter the work order business unit, the work order type, the service group, the shop, and the work order priority. The business unit and shop control many of the default values that appear in the work order. You can override most of these values. The work order consists of these pages:

- Work Order page.
- Requirements page.
- Schedules page.
- Actuals page.
- Cost page.
- Miscellaneous page.

Work Order Page

The Work Order page contains the header information that applies to the entire work order. Some of the information is optional and is more often entered at the task level. The Work Order page includes:

- Overall header information, which consists of the estimated start and ending dates of the work order, the work order duration, and service request information if the service request was used to create the work order.

  You can also see the current status of the work order. PeopleSoft Maintenance Management enables you to define statuses that are unique to your organization. However, you must match these unique values to internal system status values. These internal values dictate the activities that you can perform in a work order.

  The approval status also appears in the header information. You can set up workflow to arrange for levels of management to approve the work order. The status of this approval process appears in the work order. You indicate in the setup of the work order business unit, work order type, and shop whether to enforce workflow approval or let the system automatically approve work orders.

  You can attach information, such as diagrams, schematics, and other files that are relevant to the work order. In addition, you can enter values for supplemental data elements on the work order. Organizations often have specific information, such as additional fields, to describe hazardous waste data that they want to include in a work order. PeopleSoft Maintenance Management enables you to set up supplemental data elements and display them on a work order page without changing the underlying data model.

- Asset information.

  You can select the asset to maintain or repair or leave this field blank, because some maintenance and repairs do not involve assets. You can omit the asset information on the Work Order (header) page and specify an asset at the work order task level. If you select an asset on the Work Order (header) page, the system populates the work order tasks with that asset information. You can override the asset information on work order tasks if necessary.

  When you set up the work order business unit that is used to create a work order, the Definition page contains an Asset Lookup Field. You select the type of asset identification that you want to appear on the work order. You can select either asset ID, vehicle identification number (VIN), tag number, or serial ID. The asset lookup field that you select in the business unit will appear as the field name in the work order. Other asset information includes the asset location, the asset area ID, the asset criticality, and the parent asset, which you can select for assets that are components of other assets.

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If the asset that you select has any warranties with which it is associated, a visual indicator displays a message that at least one active warranty exists. You can click a link to view those warranties to verify that you are not overservicing or underservicing an asset.

Any asset that is identified as hazardous appears with an alert on the work order to caution the user before beginning work. You can also access a Downtime link to enter the amount of time that the asset will be down. This information is updated in PeopleSoft Asset Management. An Asset Details link appears on the page, which provides additional information about the asset. You can also click links to view the Work Order Maintenance History and the PeopleSoft Asset Management Asset Maintenance History for the asset.

- Job template.

  When you identify an asset, you can search for and access the appropriate job template and copy the requirements data that is specified in the work order tasks and associated with the job template to the work order. This helps to streamline the data entry for complex or frequently occurring jobs. You can create additional tasks for the work order over and above the tasks that were created by the job template.

- Work order tasks.

  You can add work order tasks from this page. However, if you plan to define resources and other requirements for a task, you normally create and define each task on the Requirements page. Each task that you create is listed in this grid at the bottom of the Work Order page.

Requirements Page

The Requirements page enables you to define each work order task for planning and estimating purposes. You can optionally define the resource requirements for each task in this page. The information in the Requirements page includes:

- The required start and end dates and times of the task and the duration of the task.

  You can also manually change the status of a task. If the task depends on another task, you can identify that task and indicate the percentage of overlap between the two tasks.

- Additional task data.

  If you are a user with access to modify work order accounting information, you can click a link to access the Work Order Task Accounting page and select the appropriate capitalization/retirement filter, enter a minimum capitalization amount, and select a rate set or rate plan, which is set up in the Project Costing system. The Project Costing system uses this information to calculate chargeback costs for this work order task.

  A default project activity value appears as read-only if this is a work order-managed project. You must select an activity if this work order is associated with a Project Costing-managed project.

  If the shop that is associated with the work order allows crew scheduling, a default preferred crew ID is derived from the shop. You can override this crew, as well as change the shop for the crew for the task.

  This is also where you can identify the name of a supervisor who is responsible for the work order, the task scheduler, and a contact. When you enter a scheduler's name, this task automatically appears in the Work Order Workbench for this scheduler.

- Asset Information

  If you identified an asset in the header on the Work Order page, this information is copied to each task. You can override this default data with another asset. If you specified that you want to use multiple assets in a work order in the work order business unit, you can identify different assets for each task.

- Problem reporting.

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The problem group, problem, cause, and resolution (PCR) fields enable you to associate the asset in the work order task with a specific problem. You define these codes in advance and create a problem group, which creates a hierarchical relationship between a particular problem, its associated causes, and possible resolutions that are associated with the cause. You can also associate a problem group with a classification of assets. When you select a problem group for a work order task, the problem, cause, and resolution field value choices are narrowed based on the way that you set up the problem group. You can use this information to track a recurring problem that is associated with an asset to determine whether you want to continue to repair the asset. You can associate the resolution codes with work order task templates and work order job templates so that when you find an appropriate resolution to a problem, you can select a template and automatically copy the necessary resources to a work order. This step can save you time and improve accuracy.

See Chapter 9, "Defining Work Order Templates," Understanding Work Order Templates, page 239.

- Resource requirements for a work order task.

  You can define resource requirements for labor, inventory, purchased items, on-hand materials, and tools for each work order task. You can also create work order task templates and predefine some of this requirement information. When you associate the template with the task, the requirements are copied to the task. You can define requirements for:

  - Labor resources.

    The craft that is identified in each work order task defines the labor resource requirements. You can enter the number of labor resources that you will need for this craft and the total number of hours that each resource will work. You can view the qualifications for resources that are associated with this craft and add to or modify those qualifications based on the qualifications that you need to complete the work order task. You can also enter the required start and end dates and times for the resources to work. If you indicate in the work order business unit that you want to record estimated costs for these labor resources, then the labor requirements display the estimated cost and billing amounts. These amounts are calculated based on the total number of hours times the number of craft persons that are required for the task times the labor cost rate and billing rate. The system derives the labor cost rate and billing rate from either the work order business unit or the shop.

    If your organization intends to assign crews to work order task requirements, you can use the Crew Scheduling Workbench to allocate the crew to work orders. The requirements for each work order task are automatically updated based on the crew assignments. Before performing the crew assignment activities for a given crew schedule period, you would need to first define the Crew Capacity Plan for that period.

  - Inventory resources.

    You must install PeopleSoft Inventory to display the Inventory Requirements grid. From the PeopleSoft Inventory Item table, you can select the items that you plan to use to repair or maintain the asset that is identified on the work order task. If one or more EPLs is set up for the asset and inventory parts are defined, then you can select the parts from multiple applicable EPL templates. In each item row, you enter the planned quantity and the unit of measure for each item, which the system uses to calculate the estimated cost per unit and the estimated cost for the planned quantity. You control whether you want to calculate estimated costs in the work order business unit. You can enter any delivery instructions for the material, and when you identify the item and the quantity, the PeopleSoft Inventory system indicates whether the items are committed and displays the item setID, the Inventory business unit, and the GL business unit that the system uses to post the amounts to the GL from PeopleSoft Inventory.

Note. You can identify some items as floor stock. This means that the system does not include these items in the calculation of the costs for a work order. Floor stock refers to high volume, low cost items that are used regularly in a shop and that are of insignificant value to warrant the effort of charging them directly to every work order. Typical floor stock items are bolts, nuts, belts, and certain fluids, such as antifreeze, oil, and more.

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- Purchase/On-hand resources.

  You can define the noninventory items and open description items that do not require an item ID. Open description resources can be for a specific part that is not defined in the item table, a tool that is required for the completion of the work order, or a contract labor resource. For contract resources, you can optionally elect to set up a noninventory item ID for that resource and use the item ID instead of an open description. You can also identify the materials that are on-hand in the shop and are therefore not calculated in the work order costs. If an EPL is set up for the asset and noninventory, open description items and tools are defined in the EPL, then you can directly select the materials and tools that are defined in the list for the asset from the EPL. Similar to inventory items, you enter the planned quantity that you need for the work order task, the unit of measure, and any delivery instructions. If the item is a noninventory item, the system displays the item setID and GL business unit. If you indicate in the work order business unit that you want to calculate estimated costs, then the system multiples quantity based on the unit of measure times the unit cost of the selected type of resource and displays the estimated cost for each type of resource that you need to purchase.

- Tool resources.

  Tools are assets that are used to perform work order tasks and are located in the asset repository. Tool requirements are based on selecting one or more asset classifications (asset type, subtype, manufacturer ID, and model). You enter quantity of a given type of tool that you need to complete the work order task and the number of hours that the one or more tools are needed. For tools, you can also enter the estimated usage based on the unit of measure that is appropriate to that tool. For example, you might need to use only one cement mixer for four hours to repair a wall. However, the cement mixer costs eight dollars per day to use. In this case, you would enter an estimated usage of one day. The cost per day is multiplied times this estimated usage figure and the required quantity to determine the estimated cost for the cement mixer. You can also enter estimated start and end dates and times for each tool.

• Instructions, a checklist, attachments, and supplemental data with each work order task.

  You can enter step-by-step instructions on how to perform the task and create a checklist of information to guide the technician in completing the task. When you identify the checklist *after task* steps as *required*, the system prevents you from changing the status of the task to *complete* until the technician digitally signs off on all of the required steps. If the checklist step is identified as *before task,* you cannot transition the task's status to a *work in progress* user-defined status until the step is completed.

If the system calculated the estimated costs for each type of resource requirement, then these costs are totaled and compared to the scheduled costs and actual costs in the Costs page of the work order.

Note. Selecting an existing work order task template copies the requirements that are defined in the template to each of the grids (labor, inventory, purchase/on-hand, and tools) for the work order task.

Schedules Page

You enter the scheduled start and end dates and times for a task on the Schedules page. You can override the duration of the task, change the status of the task, select a dependent task and overlap percentage, if applicable, and a contact on this page. The default asset information is normally derived from the Requirements page or from the Work Order page. However, if no asset information was entered on the Requirements page or the Work Order page, you can select an asset for the task on this page if this task applies to an asset. The same links that are on the Requirements page are available on this page.

If you defined resource requirements on the Requirements page, you can copy these requirements to the Schedules page for labor, inventory, purchase/on-hand, and tool resources.

The resource schedules include:

• Labor.

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PeopleSoft Maintenance Management enables schedulers to schedule labor resources individually or based on a crew. Labor resources, whether individual or within a crew, are selected based on craft code. When scheduling individual resources, you can select a button that initiates the searching process, which matches the pool of resources that are set up as a resource group in PeopleSoft Maintenance Management with the labor resource requirements for the work order task, and then recommends labor resources with the qualification and availability percentages. These percentages function as a guide in scheduling the resources to the work order tasks.

You can overbook a labor resource if necessary. You can also check the individual employee's calendar for availability. The system recommends labor resources based on the continuous scheduling flag, which means that you can schedule the resource only for a continuous block of time. If no employees are available to perform the task, you can create a purchase order or purchase requisition to hire someone from outside of the organization.

You can establish the schedule costs for each labor resource by entering the number of hours that the resource will work on the task. The default labor cost and bill rates are derived from the work order business unit or shop. The shops that are associated with scheduled labor resources are automatically added to the shop list on the Work Order Access page, which enables the resources to access the work order tasks in the Technician Workbench or to search for and access express work orders. You can also override the associated ChartField distribution for each resource. All accounting for labor resource charges is set up in PeopleSoft Maintenance Management and in PeopleSoft Payables (which share their time-entry infrastructure), and the time data load to PeopleSoft Project Costing, which calculates actual costs and chargeback amounts.

- PeopleSoft Inventory.

  You must install PeopleSoft Inventory to use this feature, which results in the display of a link to the Inventory Schedules grid on the Schedules page of the work order. You can copy the Inventory requirements to the Inventory Schedules grids.

  You can determine the parts that are required to repair or maintain the asset by selecting from the EPL if they are defined for the asset in PeopleSoft Asset Management. The EPL contains a list of the inventory and noninventory parts that you need to repair and maintain the asset. PeopleSoft Maintenance Management enables you to select from multiple applicable EPL templates from the Schedules page. You can also manually select an item from PeopleSoft Inventory in the Schedules grid.

  You can check the availability of an item based on a specific date by clicking the Item Availability button, which indicates on the Inventory Schedules Availability grid whether the item is available. If the item is not available, you can click a link to determine the reason or reasons that it is unavailable and view the earliest date that it will become available. You can also click the Item Availability and Balance inquiry links on the Inventory Schedules grid to review the current status of a selected item. You can determine item availability based on future dates for a batch of inventory items by generating the Work Order Task Material Readiness Report. You can enter delivery instructions, calculate the scheduled costs, and override the ChartField distribution values for each item. You must enter a date when you need the inventory item for the work order.

  You indicate in the work order business unit, shop, or work order type level whether to commit and reserve each item or a batch of items that are specified in a work order based on a combination of commit rules and reservation rules. Items are committed based on the creation of the parts list, the creation of a pick plan, or a change in the work order task status, or you can commit the parts at the time that you want to reserve them. You select a commit rule and then select a reservation rule that reserves parts based on the creation of a parts list, pick plan, change in the work order status, or batch reserve. The scheduling row for the item indicates whether an item was committed and reserved. Authorized schedulers can also click the Reserve button in the work order to override the reservation rules and reserve an item on the spot.

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You can also unreserve an item if a quantity is needed for a work order task with a higher priority. Planners and schedulers can also click the Shortage Workbench button on the Schedules page to move demand from one work order to another and to notify the primary work order contact that a quantity of an item is no longer reserved. When a work order task is closed, canceled, or completed, the system verifies that you want to perform this process, including the returning of excess demand to PeopleSoft Inventory. If you indicate that you want to continue, the system automatically handles removal of the excess demand from the work order task.

You can click the link to the pegging workbench to reserve incoming supply to your work order or view the pegging status of the item in the pegging inquiry. If you have been granted user access on the User Preferences, Maintenance Management page, you can select the pick plan processing options, as well as generate a pick plan. Depending on how you set up the pick plan, the technician can either print out the pick plan and hand it to the inventory clerk, or the system can route the pick plan to the inventory clerk. PeopleSoft Inventory provides additional options for the pick plan batch process that you can set up to run at various times that are appropriate to your organization.

See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Pegging Supply and Demand," Understanding Pegging.

- Purchase/On-hand.

  To complete a work order task, you can identify items that require procurement, such as contracted labor, tools, noninventory items, and open description resources in the Purchase/On-hand grid. You can also identify one or more resources that you might already have on-hand. These resources do not require procurement, but are required to complete the work order. Costs are not taken into consideration for any resources that are marked as on hand. If an EPL is available for the asset that is associated with this work order task, you can select the noninventory parts that you need to purchase from multiple applicable EPL templates.

  You can inquire on any existing requisitions or purchase orders that were created for work orders by clicking the Procurement Inquiry button. You specify vendor information for the purchase, select each resource line that you want to purchase, and load those lines into staging tables. PeopleSoft Purchasing creates either purchase orders or requisitions, depending on how you configure the work order business unit. If you have proper authority, you can click the Add Requisition or the Add Purchase Order button to navigate to the Procurement maintenance page and add a new requisition or purchase order.

  The Purchase/On-hand Schedules grid also identifies whether a resource has been pegged and provides access to the Pegging Inquiry component in PeopleSoft Inventory. Once the resource is pegged, you can click the Item Availability button to determine availability of the selected item based on the scheduled due date. The Purchase/On-Hand Schedules Availability grid displays whether the resource is available. If it is not available, you can click the link to view the reasons that it is not available. You can also determine item availability based on future dates for a batch of procured items by generating the Work Order Task Material Readiness Report.

- Tools.

  Tools are assets that are used to maintain and repair other assets. You can identify them based on their asset characteristics (asset type, subtype, manufacturer ID, and model), as well as assign specific assets, which are identified by asset ID and the Asset Management business unit, if necessary. You can set up resource groups for tool resources, just as you can for labor resources, and perform searches for appropriate tools. The search compares the resource requirements of the tools with the tools that are set up in the specified resource group. The system recommends specific tool resources and determines their availability.

  You can also check the availability of a tool by reviewing the asset calendar that is associated with the tool. You can overbook a tool if necessary. Searches for tools can take into account the continuous scheduling flag, which enables you to indicate whether you need the tool to be available for a continuous block of time. If you decide that you need to purchase a tool resource, you can copy the tool from the Tool Schedules grid into the Purchase/On hand grid by clicking the Move Selected to Purchase button.

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Similar to the other resources, you can override the ChartField distributions for each tool resource. The cost and bill rate for tools are based on the asset type and subtype and are defined at the shop level. You can calculate the scheduled tool costs based on the amount of scheduled usage, such as 2 days at ten dollars per day, that you expect to use a tool on a job. PeopleSoft Maintenance Management stores these actual costs of tools and sends them to PeopleSoft Project Costing.

- Warranty claim.

  From the Schedules page, you can generate a warranty claim for the costs of a work order. Use this feature if your organization has warranties from vendors or suppliers who allow you to recover the cost of work that you perform on the assets. The feature automatically copies all of the costs from the work order task into a warranty claim. You can then modify the claim and submit it to the vendor or supplier for the recovery of costs.

Actuals Page

The Actuals page in a work order displays the work order task with the scheduled start and end dates and times and the actual dates and times that the work order task started and ended. Actual values that appear in this page are usually entered on the Technician Workbench. In addition, the page has four grids:

- Labor actuals

  This grid displays the scheduled start and end dates and times and the actual start and end dates and times, as well as the actual hours that were worked for each labor resource who was assigned to the task.

- Inventory actuals

  This grid displays each item and its quantity scheduled and quantity required. It also displays the quantity issued and the quantity used for each scheduled item. If you want, you can enter the quantity used for each item.

- Purchasing actuals

  This grid displays the resource, the resource type, and its unit of measure.

- Tools actuals

  This grid displays the scheduled start and end dates and times and the actual start and end dates and times, as well as the actual hours that each tool was used, the actual quantity of usage units consumed, and the unit of measure for usage of the tool.

Costs Page

This page presents the total estimated, scheduled, and actual costs of labor, inventory, procurements, and tools for the entire work order. It also displays the variance between the estimated costs and the actual costs.

The page contains a sum of the totals that represents the total estimated, scheduled, and actual costs, along with the variance, for both the work order and each work order task. Another grid further delineates the total actual costs of each resource by category (labor, inventory, purchasing, and tools). You can click the Capitalize and Charge Back buttons for a work order task to view the actual capitalized costs and chargeback transactions. You can display the actual work order task costs before a work order task is closed by running the Cost Summarization process in PeopleSoft Maintenance Management. When you close a work order, the Cost Summarization process runs automatically and updates this page. The system automatically updates the tools costs when a technician enters them on the technician's workbench.

Note. On-hand items are not calculated and rolled into the Costs page.

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Miscellaneous Page

The Miscellaneous page of a work order contains much of the work order header information, along with when and who last modified the work order, the work order's source, such as service request, and the project ID that is associated with the work order. If this is a preventive maintenance work order, the system specifies the maintenance type. You can select a parent work order if the work order is a child of another work order. If this is a parent work order, the system lists the child work orders. If you created the work order based on another work order, then you can select the originating work order, which is informational only. You can also indicate whether this is a standing work order that always remains open or is reused multiple times.

The shops of scheduled labor resources, which are different from the shop that is specified for the work order, are automatically added to the Work Order Access page. This enables these resources to access the Technician Workbench and express work orders. Users can access the Technician Work Order Access link on the Miscellaneous page to view these shops, and to add one or more shops that may have resources that need access to the Technician Workbench and express work order. You also can delete shops from the Work Order Access page to restrict access to given work orders.

PeopleSoft Maintenance Management Workbenches

PeopleSoft Maintenance Management workbenches enable specific users to access and manage work order data. These workbenches include the:

- Work Order Workbench
- Crew Scheduling Workbench
- Technician Workbench
- PM Schedule Workbench
- Labor Assignment Workbench

Work Order Workbench

You identify the scheduler for a work order task on the Requirements page of the work order. This scheduler can schedule resources on the Schedules page of the work order. Once the resources are scheduled, the assigned scheduler can access all assigned tasks that are associated with one or more work orders on the Work Order Workbench. The Work Order Workbench enables a scheduler to manage tasks on more than one work order throughout the life of the work order. Schedulers can create and save views by specifying work order data. These views enable the scheduler to easily access specific tasks. For example, you can create a view for all work order tasks with a specific status or all work order tasks that apply to the same asset.

The Work Order Workbench displays the tabs, which include the:

- Task Overview.

  You can access the actual work order, a task description, asset information, and notes from this tab. You can also view the task number, work order type, priority, status, and work location description of each task.

- Schedules.

  You can view the required start and end dates and duration and add or modify the scheduled start and end dates and times.

- Resources.

  You can click the Labor, Inventory, Purchase/On-Hand, or Tools link to access the specific task resource schedule on the Schedules page of the work order.

- Asset Information.

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You can click the Warranty link to view any warranties that are associated with the task's asset and add new warranty information. You can also review the Work Order History for the asset and access the asset's monthly calendar. A hazardous waste warning icon may appear if hazardous waste is associated with the asset.

You can also change the status of more than one task at the same time on the Work Order Workbench.

See Chapter 18, "Scheduling a Work Order," page 443.

Crew Scheduling Workbench

The Crew Scheduling Workbench enables schedulers to schedule crews, rather than individuals, to work orders in specific periods and establishes the scheduled hours metrics by crew and craft for future schedule completion and compliance analysis. You can load up a crew based on the availability of the crew by craft. As you allocate each work order task to a craft, you can immediately compare the results against the target load percentage.

Using this workbench, you can determine and schedule backlog work and carryover work. You can also unschedule work and track the reason for unscheduling the work. You can save the schedules in draft mode or freeze them and save the summary totals to the Crew Schedule Metrics. Users can view crew assignments on the Requirements page of the work order, but they cannot modify them.

The Crew Scheduling Workbench also enables you to set up search views that display work orders and tasks that you need to access multiple times. For example, you may want to set up views based on Scheduling Status such as scheduled tasks, unscheduled tasks, carryover tasks, and more.

The top section of the work bench displays the crew capacity data, which is set up based on the establishment of a crew capacity plan. The lower section of the workbench includes these tabs:

You can select actions to perform on one or more selected rows using the Actions field, which appears between the crew capacity grid and the workbench. This actions include:

- Assign Crew.
- Change Crew End Date/Time.
- Change Crew Start Date/Time.
- Change Period.
- Change Status.
- Confirm Metrics.
- Create Labor Schedules.
- Go to Labor Assignment WB (workbench).
- Go to PM Projections.
- Remove from Schedule.
- Report Completed Date.
- Update Carryover Hours.
- Update Completed Man Hours.
- Update Scheduled Hours.
- Crew Assignments tab.

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This tab displays the information that is most relevant to assign rows to crews, which includes the work order, the task, the task status, the craft, and the estimated hours. This information is derived from the work order task. The fields for the crew, scheduled hours, carryover hours, completed hours, and completed schedule status are normally updated for each row based on the action data selected for the Action field.

- Resources tab.

  This tab enables you to review Labor, Inventory, Purchase/On-Hand, and Tool resource data for each work order task. This enables a scheduler to review scheduled resources in order to make an informed decision about each task when scheduling a crew to a task. You can also assign a crew from another shop to a single row or select the Assign Crew action to change the crew and shop for multiple selected rows.

- Schedules tab.

  This tab displays the required start and end dates and times for each row based on information derived from the task. The required dates provide information that enables the scheduler to determine the best dates and times to schedule the crew.

- Rescheduling tab.

  This tab displays information regarding any rescheduling actions performed in the past and updated in the rescheduling history. You can manually enter a rescheduling reason code for a single row that has been rescheduled. If you reschedule multiple rows by selecting an action (change period, change start date and time, change end date and time, and more), a reason and description field appear as fields associated with the selected action.

- Asset Information tab.

  You can review the asset business unit, location, area, and criticality of the asset that is associated with each task. You can also view the asset's calendar, the Work Order Task History, and the Asset Maintenance History. The scheduler can determine the availability, location, and importance of the asset in order to schedule the crew appropriately.

- Messages tab.

  When you perform an action, the system may display an error, warning, or informational icon on one or more rows, and a Messages tab appears. This tab describes the error, warning, or information based on the icon that appears on the Workbench.

After the scheduler completes the scheduling of crews for the next period using the Crew Scheduling Workbench, the craft supervisor can access the Labor Assignment Workbench to assign each technician within the crew. Supervisors can view the daily workload of the crew members all at once and allocate the workload appropriately. A supervisor can also reschedule work to a different resource, remove resource assignments, and display the daily capacity, load, and tasks of each assigned resource. Craft supervisors and schedulers can also make individual assignments outside the crew using the Labor Assignment Workbench.

See Chapter 19, "Performing Crew Scheduling," page 523.

Technician Workbench

The Technician Workbench enables technicians or an authorized employee to access their assigned tasks and enter their time and inventory and noninventory materials used, and the tools that were used on each task. If the task is associated with a preventive maintenance work order that determines maintenance based on meter readings, the technician can update the meter reading for the asset, update instructions and checklists, view attachments, enter any parts that caused the problem, and access the employee's calendar. Icons appear for any task assets that have warranties or hazardous characteristics associated them. The technician can also change the status of more than one selected work order task at the same time. If a crew was assigned to work order tasks, you can also report carryover hours, completed hours, and completed dates.

The tabs on the Technician Workbench include:

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- Details tab.

  You can view details of the work order, access a selected task on the Schedules page of the work order, review the asset information, scheduled task start and end dates, priority, and task status, and view or add notes and supplemental data.

- Details 2 tab.

  You can view the scheduled start and end times, the required start and end dates and times, the asset business unit and location, the project ID and activity number, and the shop, lead person, supervisor, and scheduler for each task.

- Task Actual Dates/Times tab.

  You can enter the actual start and end dates and times for the task and enter any downtime for the asset.

- Failure Reporting tab.

  You can select a problem group and the associated problem, cause, and resolution codes for each task, which enables easier searching and tracking of work order tasks.

See Chapter 21, "Executing and Completing Work Orders," Understanding Work Order Execution, page 595.

PM Schedule Workbench

The PM Schedule workbench enables a scheduler to manage multiple PM Schedules. You can search for PM Schedules to appear based on the asset, the asset location, or the work location. The Preventive Maintenance Schedule Workbench page displays a list of PM Schedules and includes these tabs:

- PM Schedule Info. (information) tab.

  You can click the Edit button for a schedule to access the selected PM schedule. This grid also displays the schedule ID and description, the asset business unit, the maintenance type, whether it is associated with a meter, whether any blackout periods exist, the threshold percentage, and the basis date for the schedule.

- PM Loop Info. (information) tab.

  If a schedule is associated with loop, you can view the loop ID and loop definition.

- Work Order Info. (information) tab.

  You can review the work order business unit, the work order template ID, and the shop, work type, service group, priority code, approval status, internal status, and description of the work order that will be or has been generated for this schedule.

- Date Options tab.

  You can review the schedule type, interval, week, date of the month, day, and whether the date is generated from the last completion of the previous work order.

- Scheduling Option tab.

  You can view the selected scheduling option for each PM schedule.

- Project tab.

  You can view the project ID, activity number, and whether the project is a work order-managed project.

- CBM Alert tab.

  You can view override options that are set up for the CBM alert and the source of the CBM alert.

- Last Reviewed tab.

  You can view the name of the person who last reviewed a PM Schedule and the date that it was reviewed.

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See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding the Preventive Maintenance Process, page 317.

Labor Assignment Workbench

After the scheduler completes the scheduling of crews for a period using the Crew Scheduling Workbench, the craft supervisor can access the Labor Assignment Workbench to assign each technician within the crew. Supervisors can view the daily workload of the crew members all at once and allocate the workload appropriately. A supervisor can also reschedule work to a different resource, remove resource assignments, and display the daily capacity, load, and tasks of each assigned resource. Craft supervisors and schedulers can also make individual assignments outside the crew using the Labor Assignment Workbench.

You can search for work orders that are either crew scheduled or non-crew scheduled. When you search for crew-scheduled work orders, you must select a shop, crew, and period. An Availability grid displays the availability of the crew members for the selected period. You assign employees to the crew based on this availability. You can search for resources and display their capacity, load, and tasks assigned each day. You can also reassign and unassign resources. When you create these assignments, they are updated on the work order task's labor schedule rows and on the Technician Workbench.

The tabs on the Labor Assignment Workbench include:

- Assignments.

  You can select the employee ID and change the hours that are required for the task. You can also indicate whether overbooking is allowed.

- Schedules.

  You can change the scheduled start and end dates and times.

- Asset Information.

  Review information about the asset and access any warranties, the Work Order History, and the asset's calendar.

- Distributions.

  Access and modify ChartField distribution for PeopleSoft Payables.

- Messages.

  If error messages, warnings, or information exist about the row, this tab appears and contains a description of the error, warning, or information.

Work Order Processing

This section discusses:

- Work order execution.
- Work order close.
- Work order inquiries and reports.

Work Order Completion

There are two components in PeopleSoft Maintenance Management that you can use to enter data to complete a work order. These components are:

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- The Technician Workbench.

  This component enables technicians and authorized personnel to enter labor time, materials, tools and other data that pertain to one or more work orders.

- The Work Order Completion component.

  This component enables, typically supervisors, to enter labor time, materials, and tool usage for the tasks associated with a single work order.

Work Order Task Completion Using the Technician Workbench

Technicians and authorized users can access the Technician Workbench to search for and view a list of all of their assigned work orders and tasks. The workbench, as described previously, provides detailed information about each task assigned to a specific technician. The technician can:

- Change the status of one or more selected work order tasks.
- Review the work order data and the task data, including required start and end dates and times, scheduled start and end dates, project information, supplemental data, and notes that are associated with the task.
- Access the work order task, where they can schedule resources and perform additional updates, if authorized.
- Enter the actual start and end dates and times of the task.
- Classify the issue that caused the task by a problem group, problem, cause, and resolution.

In addition, links are available from the workbench, which include:

- The capability to view the work order header details.
- The capability to update the asset's offline status and enter a new asset location, area, and effective date.
- Task note entry.
- Supplemental data entry.
- The capability to update the pre-task and post-task checklist.
- Service requests, which indicate the number of active service requests that are assigned to a specific technician and transfer the technician to the Service Request Inbox. Technicians can address the service requests to which they are assigned.
- My Calendar, where technicians can view their assigned tasks on a daily, weekly, and monthly basis.
- Time Entry, which enables technicians to enter either the elapsed time or punched time that they took to perform the work order task.
- Materials, which enable the technicians to view a detailed list of all materials (inventory, floor stock, on-hand, and purchased) that are assigned to a work order task, see the delivery instructions for the material, and generate and print an PeopleSoft Inventory picking list.

  The technician can later enter the quantity of each item that is used to perform the work order task.

- Tools Usage, which enables technicians to enter the actual start and end dates and times for each tool (asset) that they use to perform a work order task. Technicians can also enter unscheduled tools and their usage here.
- Meter Reading, which enables the technicians to enter the current meter reading information for the asset that is being maintained or repaired.

  You can click an icon next to the Advanced Options link to access a user-driven Meter Reading Trend Chart and access the Meter Reading History table.

- Procedures, which enable the technicians to view and sign off on the checklist, view the instructions, and view and print attachments that are defined or associated with the work order task.

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The technician can also click a link to access the actual work order and work order task, where the technician can make modifications or changes to the task and the work order, if authorized to do so.

- Causal Parts, which enables the technician to enter the parts that caused an equipment failure that resulted in the necessity of the work order task. This serves as additional reference information or you can use it when filing a warranty claim based on a work order task.
- Report Crew Assignment Time, which enables a technician to report carryover hours, completed hours, and completed dates.

You can click a Mass Change button that enables you to update the selected work order tasks with actual dates and times and PCR (problem, cause, and resolution) codes.

You can also click a Print button that enables you to access the Work Order Task Detail Report page, from which you can print resource assignment reports and reference reports with a bar code.

Work Order Task Completion Using the Work Order Completion Component

The Work Order Completion component enables you to work completion data for the tasks associated with a single work order. The Work Order Completion component has many of the same capabilities as the Technician Workbench. The differences between using the Work Order Completion component rather than the Technician Workbench are:

- You enter data for tasks associated with a single work order, rather than multiple work orders.
- You must enter labor actuals using the Elapsed Time Entry method for each employee that worked on a task. When you submit these transactions, they are automatically staged for cost collection by Project Costing. The Technician Workbench requires that the transactions be staged separately in Time and Expenses.

Note. The system will prevent you from entering labor time entries for a task row n the Work Order Completion component if you have already entered them on the Technician Workbench. It will also prevent you from entering labor time entries on the Technician Workbench if you have already entered them on the Work Order Completion component.

- You cannot enter actual data for crew scheduling on the Work Order Completion component.
- The remaining fields and links are identical to the fields on the Technician Workbench.

For each task associated with the work order, you can:

- An actual start and end date and time.
- Problem, cause, and resolution data.
- Enter labor actuals.
- Enter tool usage.
- Enter materials used.
- Causal parts.
- Complete checklists.
- Add notes.
- Report asset downtime.
- Enter supplemental data.
- Change the status.

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Work Order Close

Once work order tasks are executed, the actual costs of labor transactions, materials issuances and returns to stock in PeopleSoft Inventory, procured items from PeopleSoft Purchasing and PeopleSoft Payables, and tool costs are collected and loaded to the PeopleSoft Project Costing system. You can indicate in the work order business unit or the work order type the grace period between when a work order task is marked complete and when it is closed.

These activities are performed when you close a work order task:

- The costs for an asset that is associated with a work order task, along with asset downtime, are updated in the asset's Maintenance History of the Asset Repository and currency conversions are performed from the currency that is specified in the work order business unit.
- For work order tasks that are associated with work order-managed projects, the capitalization limit rules that are set up in PeopleSoft Maintenance Management are validated, and the capitalization information is updated in PeopleSoft Project Costing.

  Also, the retirement of an asset is validated in PeopleSoft Maintenance Management and the retirement rules are updated in PeopleSoft Project Costing.
- For chargeback costs for work order tasks that are associated with a work order-managed project, the chargeback information in the work order is validated and the work order transaction is priced in PeopleSoft Project Costing. The Pricing engine then sets the GL distribution status (GL_DISTRIB_STATUS) to *hold* until the work order task is closed in PeopleSoft Maintenance Management. Once the work order task is closed, the GL distribution status is set to *costed* so that the accounting engine can process each transaction row.
- The Work Order Task Status History and the Work Order History are updated.
- The Cost Summarization process is automatically run, which updates the actual costs in the Costs page of the work order.

Once all of the work order tasks are closed, the work order is automatically closed.

Work Order Inquiries and Reports

Several inquiries and reports are available in PeopleSoft Maintenance Management. A brief description of each of these reports appears in the Reports appendix. When you click the Print button in the Technician Workbench, you print the Work Order Task Detail report. You can also print this report from a run control page.

Additional reports include:

- Warranty Claim report.
- Preventive Maintenance report.
- Preventive Maintenance by Process Instance report.
- Preventive Maintenance Projection by Process Instance report.
- Crew Availability report.
- Crew Schedule (Assignment) report.

  This report provides the user an option to include detail at run time. The individual technician assignment is included when the Include Detail check box is selected.
- Crew Carryover Work report.
- Crew Unscheduled Work report.

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- Work Order Task Material Readiness report.
- Schedule Maintenance Completion Report.

The inquiries include:

- Asset Maintenance History inquiry, which displays the estimated versus the actual costs of maintaining an asset.
- Work Order History inquiry, which displays a summary of the estimated versus the actual costs for each work order.
- Work Progress Tracking inquiry, which displays a list of work order tasks that are behind schedule based on the scheduled start date, end date, or both and the percentage that they are behind.

  You can set up search criteria, which you can save, to display a list of work order tasks that are behind schedule.
- Purchasing and Pegging inquiry, which displays a list of purchase orders or requisitions that were created for a work order, along with the quantity pegged.
- Chargeback inquiry, which displays the list of chargeback debit and credit totals for a work order business unit, shop, and GL business unit.
- Capitalization inquiry, which displays the amount capitalized and the actual cost of maintaining an asset based on the work order business unit, shop, and work order type. This inquiry also lists the Asset Management business unit, the asset classifications, the work order ID, the capitalization amount, and the actual costs.
- Crew Schedule inquiry, which enables users to search and view schedules across schedule periods, all future schedules for a given crew, and past schedules.
- Crew Schedule Metrics, which enables schedulers to measure how well the crews comply with the schedule for the scheduling period and to determine a better target load percent, which is a target value that is used to reduce the expected availability of the crew to allow for unscheduled events, for future periods.
- Crew Rescheduling Metrics component, which enables users to review the reasons for rescheduling crews. Users can update the rescheduling reason or add and update any comments.
- Asset Downtime Review inquiry, which enables users to review the dates and reasons for the downtime of assets that are associated with a work order.

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CHAPTER 4

Understanding Integrated and Shared Products Setup Considerations

This chapter discusses:

- Integrated product setup considerations.
- Shared product setup considerations.

Integrated Product Setup Considerations

Oracle's PeopleSoft Enteprise Maintenance Management integrates with a large number of PeopleSoft products. Some of these products are key to the planning, scheduling, execution, and processing of work orders and may have unique or required setup considerations based on their integration with PeopleSoft Maintenance Management.

This section discusses:

- PeopleSoft Asset Management setup considerations.
- Project Costing setup considerations.
- PeopleSoft Purchasing setup considerations.
- PeopleSoft Inventory setup considerations.
- PeopleSoft CRM Help Desk 8.9 and higher and third-party help desk application setup considerations.
- Condition-based monitoring system setup considerations.

PeopleSoft Asset Management Setup Considerations

In order to maintain assets using a service request or work order, you must set up assets in PeopleSoft Asset Management's asset repository prior to setting up PeopleSoft Maintenance Management. In addition to the setup required for financial PeopleSoft Asset Management, PeopleSoft Maintenance Management recommends that your PeopleSoft Asset Management setup include:

- Installation options.
- Asset locations.
- Asset area –Set Up Financials/Supply Chain, Product Related, Asset Management, Service and Repair, Area Definition.
- Asset type, asset subtype, manufacturer ID, and model.

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The only place that the manufacturer ID and model are associated with the asset type and subtype is in the equipment parts list (EPL) in PeopleSoft Asset Management. You set the manufacturer ID and model up in Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Manufacturers and Manufacturer Model Relation.You associate them with an asset in PeopleSoft Maintenance Management task and template setup.

- Chargeback information at the asset level.
- Component changeout rule definitions at the Asset Management business unit, asset type, asset subtype, and asset levels.
- Maintenance types (Set Up Financials/Supply Chain/Product Related, Asset Management, Service and Repair).

Note. Users define maintenance types in PeopleSoft Asset Management and associate them with an asset type and subtype in PeopleSoft Maintenance Management.

- EPL. (This is optional and is located at Set Up Financials/Supply Chain, Product Related, Asset Management, Service and Repair.)
- Insurance types (Set Up Financials/Supply Chain, Product Related, Asset Management, Service and Repair).
- Standard warranties (Set Up Financials/Supply Chain, Product Related, Asset Management, Service and Repair).
- Warranty templates Set Up Financials/Supply Chain, Product Related, Asset Management, Service and Repair.
- Interunit transfer definition - Set Up Financials/Supply Chain, Product Related, Asset Management, Profiles, Asset Profiles
- Meter types Set Up Financials/Supply Chain, Product Related, Asset Management, Service and Repair.
- Assets set up as tools - Set Up Financials/Supply Chain, Product Related, Asset Management, Profiles, Asset Profiles

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, "Understanding PeopleSoft Asset Lifecycle Management".

Project Costing Setup Considerations

You must install and set up Project Costing prior to the installation and set up of PeopleSoft Maintenance Management. PeopleSoft Maintenance Management uses Project Costing to:

- Collect work order costs that are generated by PeopleSoft Inventory, PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Maintenance Management.
- Capitalize costs incurred by a work order.
- Use costs incurred by a work order to determine the cost of removal when disposing of an asset.
- Calculate chargebacks and send them to the General Ledger.
- Create work order-managed and Project Costing-managed work orders.
- Copy labor resources set up in Project Costing as labor resources for a Project Costing managed work order.
- Copy generic labor, tools, and purchase/on-hand resources specified for a project and project activity in PeopleSoft Program Management to a work order created from PeopleSoft Program Management. (Program Management must be installed along with Project Costing to use this functionality.)

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- Copy specific labor, tools, purchase/on-hand, and inventory resources associated with a project and project activity to a work order created from PeopleSoft Program Management. (Program Management must be installed along with Project Costing to use this functionality.)
- Apply resource pools created in PeopleSoft Resource Management to projects and project activities using PeopleSoft Program Management.

  You associate resource pools to projects and project activities in PeopleSoft Program Management. This enables PeopleSoft Maintenance Management to apply work order access security for resource pools. If this type of security is enforced in a work order business unit, then work order access security is enforced for all of the work orders that are created using this business unit and associated with a project that uses resource pools. Only resources that are members of one of these resource pools can search for express work orders and access the Technician Workbench if work order access security is established. This applies to both Project Costing-managed work orders and work order-managed work orders.

You must set up specific tables and features in Project Costing, which include:

- Selecting Enable Organization on the Installation Options - Project Costing page to calculate chargebacks.
- Following the Project Costing setup requirements, which include the setup of Project Costing ChartFields, transaction options, pricing structure, and more.
- Creating rate sets and rate plans in Project Costing that apply to PeopleSoft Maintenance Management and includes the rate options, WBI (work order labor bill rate), WCO (work order labor cost rate), TBI (tool billing rate), and TCO (tool cost rate) in Set Up Financials/Supply Chain, Product Related, Project Costing, Pricing Structure.
- Select the TUG (Tools Usage) analysis type on the Installation Options, Project Costing Integration page.
- Establishing one or more default work order-managed projects in Project Costing to automatically associate with any new work orders that you create directly in PeopleSoft Maintenance Management.
- Creating a project in Project Costing and clicking the Create Work Order button on the Project Costing, Activity Definition, Team, Resources by Activity page to generate a Project Costing project-managed work order.

You can also create a work order in PeopleSoft Maintenance Management and associate it with an existing project.

Note. You may only need to create one work order-managed project that you associate with most of your work orders depending on the needs of your organization.

When you set up one or more work order business units in the PeopleSoft Maintenance Management work order business unit's Integration page, you must enter the Project Costing business unit that you want to use with each work order business unit to collect work order costs. You also select a default rate plan or rate set, rate, and analysis type, which are based on the user-defined template in Project Costing to use for calculating chargebacks.

In PeopleSoft Maintenance Management, you:

- Associate projects with a work order type and service group in PeopleSoft Maintenance Management, using Associate Projects for work order-managed projects.
- Set up the default Project Costing ChartField values to use for each combination of work order business unit, service group, work order type, project, application, and resource type.
- Set up capitalization filters that specify the minimum amount that it costs to repair or maintain an asset with a work order before capitalizing costs in Project Costing.

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- Indicate in the work order business unit that you want to enforce work order access security for resource pools associated with a project and project activity.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up Project Business Units," Understanding the PeopleSoft Project Costing Operational Structure and Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

PeopleSoft Purchasing Setup Considerations

PeopleSoft Maintenance Management integrates with PeopleSoft Purchasing to enable users to create purchase orders or requisitions for materials, tools, and labor directly from the work order. You must install PeopleSoft Purchasing before setting up PeopleSoft Maintenance Management to create and process work orders. There are specific setup requirements related to the integration of PeopleSoft Purchasing and PeopleSoft Maintenance Management that you must perform, which include:

- Setting up the PO/Requisition Loader Defaults for PeopleSoft Maintenance Management in PeopleSoft Purchasing.
- Indicating whether you want to create a purchase order or a requisition in the work order business unit and in the User Preferences - Maintenance Management page, depending on the needs of your organization.

  The value that you select determines whether you can stage purchase orders or requisitions from the work order. You can also indicate that you do not want to select either option, in which case neither option is available for staging from the work order.

  See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Using the Requisition Loader," Understanding the Purchasing Requisition Loader Application Engine Process (PO_REQLOAD).

  See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

  See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

PeopleSoft Inventory Setup Considerations

While PeopleSoft Inventory is not required to implement PeopleSoft Maintenance Management, it is highly recommended in order to keep track of materials used in performing work order tasks. Before you can use the PeopleSoft Inventory functionality in PeopleSoft Maintenance Management, the information that you must set up includes:

- Following PeopleSoft Inventory set up procedures and reading the chapter in the PeopleSoft Enterprise Inventory 9.0 PeopleBook: "Fulfilling Work Orders from PeopleSoft Maintenance Management, which describes the way PeopleSoft Inventory handles inventory fulfillment of work orders from the PeopleSoft Inventory point of view.

  See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management".
- Mapping the Inventory business unit to one or more work order business units and selecting the Inventory Commit rule and the Inventory Reservation rule in the work order business unit Integration page.

  You can also define the Inventory Commit rule and Reservation rule by shop and work order type. You can specify different combinations of commit rules and reservation rules for different shops or work order types, if applicable. The system will look at the setup at the business unit, shop, and shop type levels and determine the options to use for the commit and reservation rules.

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- Setting up the debit/credit pair for inventory transactions using preestablished transaction groups that are delivered with your system.

  PeopleSoft Maintenance Management recommends setting up a generic accounting rule for transaction group 231, which means that the debit side of the accounting entry is driven from the work order.

- Configuring the ChartField selection using the Inventory transaction accounting rules and PeopleSoft Maintenance Management transaction group 231.

Note. If users do not perform this configuration and only set up transaction group 231, then this transaction accounting rule will be used every time an Inventory issuance occurs.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management".

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Defining Your Operational Structure in PeopleSoft Inventory," Establishing a PeopleSoft Inventory Business Unit Structure.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Setting Up the Accounting Rules Structure," Understanding the Accounting Structure.

PeopleSoft CRM Help Desk 8.9 and Higher and Third-Party Help Desk Application Setup Considerations

You can integrate PeopleSoft CRM Help Desk 8.9 and above and third-party help desk applications with PeopleSoft Maintenance Management using the Integration Broker. You must perform the normal setup procedures for PeopleSoft Maintenance Management, as well as set up assets in the PeopleSoft Asset Management asset repository. This provides the foundation to enable you to create work orders from help desk applications.

Additional activities that you must perform include:

- Setting up Integration Broker and activating application messages from PeopleSoft Maintenance Management to the help desk application on both the help desk application and PeopleSoft Maintenance Management databases, which include:
  - COPY_PROBLEM_TREE

    This message copies the problem tree to the help desk application for all problems that have the publish data flag selected. These are the problems available to the help desk agent when creating a work order.
  - COPY_SHOP_LOC

    This message copies all shop locations to the help desk application. These are the shops (service locations) available to the help desk agent when creating a work order.
  - COPY_WM_PRIORITY

    This message copies priorities to the help desk application. These are the priorities available to the help desk agent when creating a work order.
  - COPY_WO_STATUS

    This message copies the work order statuses to the help desk application. These are the work order statuses returned to the help desk from PeopleSoft Maintenance Management when a work order is added or updated.

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- SYNC_REQ_WORK_ORDER

  This message enables the help desk agent to add or update work orders. This message creates a work order in PeopleSoft Maintenance Management when the help desk agent invokes the Create Work Order related action on a case. The message updates a work order in PeopleSoft Maintenance Management when the agent changes the contact information on the case.

- SYNC_RSP_WORK_ORDER

  This message returns an Add or Update status to the help desk application. If the Add work order is successful, this message returns the new work order number and its initial status. If unsuccessful, this message returns the errors encountered trying to create the work order.

- SYNC_WM_WO_KEY_EVENT

  Send work order key events to the help desk application. Key events include: work order status change, work order description change, and request for more information from the work order technician.

- Setting up Integration Broker and activating all application messages from PeopleSoft Asset Management to the help desk application on both the help desk application and PeopleSoft Asset Management databases.

  See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

  See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," PeopleSoft Asset Management Setup Considerations, page 57.

- Setting up problems in the problem tree.
- Selecting the Publish Data flag for the problems you want to be available to the help desk application.
- Entering work order default values (business unit, service group, type, and priority) for all problems to be published to the help desk application.
- Executing the COPY_* messages to populate the corresponding tables in the help desk application.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," page 13.

Condition-Based Monitoring System Setup Considerations

Web Services are used to enable external condition-based monitoring systems to notify a condition-based maintenance (CBM) coordinator in PeopleSoft Maintenance Management that an asset requires maintenance or repair using a work order based on its condition. The external systems send the alert to PeopleSoft Maintenance Management. When the alert is saved, PeopleSoft Maintenance Management sends back the alert identification to the external systems.

If an error occurs in PeopleSoft Maintenance Management, Integration Broker sends the error back to the CBM system through Web Services that the:

- Asset business unit is not valid.
- Asset ID is not valid.
- Asset level is not valid.
- Duplicate alert.
- Request Message: WM_ALERT_REQ

  urn:oracle.enterprise.fscm.data.cbm.AlertRequest.V1

- Response message: WM_ALERT_RES

  urn:oracle.enterprise.fscm.data.cbm.AlertResponse.V1

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- Service Operation:WM_ALERT_ADD

  Synchronous Operation

- Service: WM_ALERT

  urn:oracle.enterprise.fscm.service.cbm.Alert

See *PeopleSoft Integration Broker 9.0 PeopleBook*

Shared Products Setup Considerations

PeopleSoft Maintenance Management shares the functionality of specific PeopleSoft products instead of integrating with these products. This means that you are not required to install these products to benefit from their functionality. However, since these products share certain functionality, you must set up common components that are used by each product.

This section discusses:

- PeopleSoft Payables setup considerations.
- PeopleSoft Resource Management setup considerations.
- PeopleSoft HRMS setup considerations.

PeopleSoft Payables Setup Considerations

PeopleSoft Maintenance Management provides a time entry user interface front-end and leverages the PeopleSoft Payables component interface, which enables you to use the PeopleSoft Payables existing time entry processing functionality. You do not have to install PeopleSoft Payables to use this functionality in PeopleSoft Maintenance Management. However, there are specific setup requirements, which include the:

- PeopleSoft Payables business unit definition (Business Unit Related, Expenses, Expenses Definition).

  You select an Expenses business unit from a list of GL business units. The GL business unit selected for the Expenses business unit must match the GL business unit identified in the work order business unit in PeopleSoft Maintenance Management.

  - Enter the time reporting options.
  - Ensure that the GL business unit defined for each employee in PeopleSoft Payables is consistent with the GL business unit defined for the work order business unit in PeopleSoft Maintenance Management.

    See *PeopleSoft Enterprise Expenses 9.0 PeopleBook*, “Defining Your Operational Structure for PeopleSoft Expenses,” Configuring Business Units for PeopleSoft Expenses.

- PeopleSoft Payables employee profile (Travel and Expenses, Manage Employee Information , Update Profile).
  - Set up an employee profile in PeopleSoft Payables for each employee that enters time in PeopleSoft Maintenance Management.

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- Select *Billable* as the billing type on the User Defaults page.

  This enables Project Costing to send the expense to Billing and create a chargeback if the project organization is set up in Project Costing for chargebacks. Selecting this field marks the expense lines and time lines with the billing code. The system carries the billing code through to Project Costing as an indicator for billable expenses or billable hours. The system charges the expense lines to the General Ledger. When the customer is billed, the payment is usually reflected as revenue offset to the expenses.

- Indicate that the employee status is *Active* on the User Defaults page.
- Enter the hire date, if not already entered on the User Defaults page.
- Select the Default Profile check box, if not selected, on the User Defaults page.

Important! Do not enter values for Project Defaults for Time in the Manage Profile, User Defaults page for PeopleSoft Payables. PeopleSoft Maintenance Management uses the project defined for the work order instead.

See *PeopleSoft Enterprise Expenses 9.0 PeopleBook*, "Maintaining Employee Profiles," Understanding User Defaults.

- Timekeeper authorization - Travel and Expenses, Manage Expenses Security, Authorize Expense Users

  To authorize a specific timekeeper to enter time for a list of employees, the user ID of the timekeeper must be added to the Authorize Users page for each employee on the list. For example, if John Majors (user ID = DVP1) will be entering time for Gina Angelini (user ID = MM1) in PeopleSoft Maintenance Management, you would access the Authorize Users page for Gina Angelini and add the user ID DVP1 for John Majors to the list of people authorized to enter time (create PeopleSoft Payables transactions) for Gina Angelini. If the list of employees for whom John Majors is entering time consist of 100 employees, you would access the Authorize Users page for each of the 100 employees and add the User ID for John Majors to the page. You only have to set this up one time or for as long as John Majors is assigned as timekeeper. To enter time in PeopleSoft Maintenance Management, both the employees on the list and the timekeeper must also be set up as resources in PeopleSoft Maintenance Management.

- PeopleSoft Maintenance Management resources - PeopleSoft Maintenance Management, Labor Administration, Create Resources.

  Set up employees as valid maintenance resources who are authorized to work on work orders and enter time in the Technician Workbench .

- Maintenance Management User Preferences.

  Identify the time report method for this user as either *Punch Time* or *Elapsed Time*.

  You must select the time reporting method of either Punch Time or Elapsed Time for users who enter time for themselves or enter time for someone else. Each of these users must be set up as a resource in PeopleSoft Maintenance Management. The time reporting method that you select for a user (timekeeper) who is allowed to enter time for someone else must be the same as the time reporting method of all the users for whom the timekeeper is entering time.

  For example, if John Majors (DVP1) is authorized to enter time for a list of 100 employees in Travel and Expenses, and the time reporting method for each employee is Punch Time, then you must select Punch Time as the time reporting method on the User Preferences - Maintenance Management page for user ID DVP1 and for the user IDs of each of the 100 employees on the list. The time reporting method for the timekeeper identified in User Preferences must match the time reporting method in User Preferences for each of the 100 employees on the list.

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Important! Based on this example, be careful not to associate the individual who enters time with a user profile where the time entry method is different from the time-entry method associated with the resources for whom time is entered.

In User Preferences - Maintenance Management, you would also want to make sure that the Allow Access to Others Tasks and the Allow Submit Time for Posting check boxes are selected for the timekeeper's user ID (DVP1). These check boxes must be selected to enable the timekeeper enters time on the Technician Workbench or the Work Order Completion component.

- Project Costing integration template (Set Up Financials/Supply Chain, Product Related, Project Costing, Project Options, Integration Templates).

  The sample data for PeopleSoft Maintenance Management predefines the Project Costing Integration Template for Project Costing business unit US001, and is set up to accept data from several GL business units including GL business unit US001.

Important! A timekeeper who enters time for employees assigned to a work order using the Work Order Completion component instead of the Technician Workbench, does not have to be set up in PeopleSoft Payables and does not have to be granted authorization in the PeopleSoft Payables using Authorize Expense Users. The time reporting method indicated in User Preferences for the user ID of the timekeeper and the user IDs of the employees for whom the timekeeper enters time is also irrelevant when the time keeper enters time using the Work Order Completion component. However, both the timekeeper and all employees must be set up in PeopleSoft Maintenance Management as resources regardless of the type of entry.

See *PeopleSoft Enterprise Expenses 9.0 PeopleBook*, "Maintaining Employee Profiles," Understanding User Defaults.

PeopleSoft Resource Management Setup Considerations

PeopleSoft Maintenance Management leverages the PeopleSoft Resource Management data model functionality to assign and schedule resources. This means that you do not have to install PeopleSoft Resource Management to use the product's resource functionality in PeopleSoft Maintenance Management. Many of the setup requirements in PeopleSoft Resource Management now reside in the Set Up Financials/Supply Chain, Common Definitions, Resource Data component. PeopleSoft Maintenance Management also leverages the capability to set up employees and their qualifications and add them as resources. You access these resource features directly in the PeopleSoft Maintenance Management menu under Labor Administration. Even if you install PeopleSoft Resource Management, you still must set up this data in PeopleSoft Maintenance Management because the requirements are slightly different. The information that you need to set up this resource data is described in detail in the chapter Setting Up Labor and Tools Resources.

To set up work order access security for resource pools associated with a project and project activity in PeopleSoft Program Management, you first must set up the resource pools in PeopleSoft Program Management.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," PeopleSoft Maintenance Management Integration with PeopleSoft Program Management, page 27.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.

Employee and Non-Employee Source Data

PeopleSoft Maintenance Management applies the same principles regarding employee and non-employee source data as PeopleSoft Resource Management.

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See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management with PeopleSoft HRMS," Understanding PeopleSoft Resource Management and PeopleSoft HRMS.

HRMS Business Unit Generation Without PeopleSoft HRMS

Every employee either in the PeopleSoft HRMS database or the Financials database must be associated with a business unit. If you do not use PeopleSoft HRMS, you must generate HRMS business units by setting up the PeopleSoft Resource Management business unit. Before you set up the PeopleSoft Resource Management business unit, you must set up the Project Costing business units that you intend to add as a default value in each of the work order business units that you set up. You can enter only one Project Costing business unit in a work order business unit. You then select this Project Costing business unit when you set up the Resource Management business unit.

If you do not integrate with PeopleSoft HRMS, when you create the Resource Management business unit, it populates the HR Business Unit table (BUS_UNIT_TBL_HR) behind the scenes.

If you use PeopleSoft HRMS, the HR business units that you set up in PeopleSoft HRMS are available to PeopleSoft Maintenance Management.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Defining PeopleSoft Resource Management Business Units," Understanding PeopleSoft Resource Management Business Units and *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Understanding PeopleSoft Resource Management Without PeopleSoft HRMS.

PeopleSoft HRMS Setup Considerations

You can use PeopleSoft HRMS as your employee source database. Selected data that is used to populate PeopleSoft Maintenance Management employee records and resource profiles is imported from PeopleSoft HRMS using application messages and the Integration Broker.

PeopleSoft HRMS and PeopleSoft Maintenance Management Implementation

When you implement PeopleSoft Maintenance Management with PeopleSoft HRMS, you create a system of business unit and setID functionality that matches the way you manage processes related to both resources and HR. The system must also handle the integration issues of using multiple applications.

If your organization uses PeopleSoft HRMS to manage employee data, you also must set up the Resource Management business unit. Consider using the same business units in the PeopleSoft Resource Management database and the PeopleSoft HRMS database. A one-to-one correlation between PeopleSoft HRMS and PeopleSoft Resource Management business units simplifies organizational structure, business rules, and processing.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*

PeopleSoft 7.x HRMS or Third-Party HRMS

If your organization uses a PeopleSoft 7.x HRMS or earlier, or a third-party HRMS application, you can create a bridge between your HRMS application and PeopleSoft Maintenance Management. You use PeopleSoft Integration Broker to map your data to PeopleSoft Maintenance Management. Although you can use other HRMS applications and PeopleSoft Maintenance Management together, a third-party HRMS application may not support the full functionality of PeopleSoft Maintenance Management.

See *PeopleSoft Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

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CHAPTER 5

Setting Up PeopleSoft Maintenance Management System Parameters

This chapter provides an overview and prerequisites of Oracle's PeopleSoft Enterprise PeopleSoft Maintenance Management's product integration and system parameters setup requirements and discusses how to:

- Define a service request business unit.
- Set up a work order business unit.
- Set up resource assignment approval options in PeopleSoft Maintenance Management.
- Set up PeopleSoft Maintenance Management work order parameters.
- Set up rules and data related to Project Costing.
- Set up ChartField distributions for PeopleSoft Maintenance Management.

Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management

This section discusses:

- PeopleSoft Maintenance Management setup considerations.
- PeopleSoft Maintenance Management installation options.
- SetID considerations in PeopleSoft Maintenance Management.
- Permission lists, roles, and user profiles.
- PeopleSoft Maintenance Management user preferences.

PeopleSoft Maintenance Management Setup Considerations

In addition to the integrated product setup, setting up PeopleSoft Maintenance Management includes:

- Installation options.
- SetID.
- Security.
- User preferences.
- Service request business unit.
- Work order business unit.
- Work order types.

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- Service groups.
- Work order priority codes.
- Maintenance types.
- Asset downtime reasons.
- Problem, cause, and resolution data and problem trees.
- Service request statuses.
- Work order statuses.
- Labor and tool resources.
- Work order templates.
- Preventive maintenance loops and schedules.
- Work order workflow approval.

SetID Considerations in PeopleSoft Maintenance Management

PeopleSoft Maintenance Management uses system data, which is set up in PeopleSoft Asset Management, Project Costing, PeopleSoft Purchasing, PeopleSoft Payables, PeopleSoft Inventory, PeopleSoft Resource Management, and other subsystems to create and process work orders. Much of the data that is set up in these subsystems is organized by setID.

It is important to understand the difference between business units, setIDs, and records:

Name	Description
Business units	A business unit enables you to track specific business information for reporting and other data consolidation. A business unit may be, but is not required to be, a legal entity. You define and implement business units to suit the organizational needs of the company. The data from one business unit is segregated from the data of other business units in the organization, although it exists in the same physical database table. The entire organization may have only one business unit if every department uses the same processing rules. Multinational or otherwise diversified companies, such as those that contain multiple cost centers, divisions, or subsidiaries, may have multiple business units.

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Name	Description
SetIDs	The accounting structure and processing rules for each PeopleSoft application are defined in a series of control tables, or tablesets. A tableset is a group of rows across control tables, identified by the same setID, that allow sharing of control data among business units. Many business units may share the same set of data on the physical tables in the PeopleSoft HRMS or Financials system. In order for a business unit to process transactions, it must have an associated tableset. In simple terms, the business unit contains the actual data; the tableset contains the rules by which the data is processed. A setID identifies each tableset. You must create at least one setID even if you are not taking advantage of tableset sharing. You can have as many setIDs as necessary, but tableset sharing becomes more complex with multiple setIDs. Define tablesets when you implement any PeopleSoft application.
Record Groups	A record group is a set of logically and functionally related control tables and views. Record groups save time by enabling tableset sharing to be accomplished quickly without the burden of redundant data entry. Record groups also ensure that tableset sharing is applied consistently across all related tables and views in the system. The PeopleSoft TableSet Record Group control table associates a business unit or setID value with a setID value for each record group. One business unit or setID can be associated with different setIDs by record group. Group the record definitions for the tables that you want to share, as well as any dependent record definitions. If a new table is added to a PeopleSoft application, the appropriate record group may already be defined. However, if tables are added for a new business function, a new record group may also be required.

SetID mapping is used to coordinate the various set control record groups. For example in PeopleSoft Maintenance Management, work order task and work order job templates reference setIDs from various subsystems. You must set these templates to copy labor, PeopleSoft Inventory, purchase/on hand materials, and tool task requirement values, which are derived from various subsystems, to a work order task. These requirements must be compatible with the various work order business units used for each work order. To accomplish this, you set up the setIDs as set control values using setID mapping:

The following table lists some of the record groups used in PeopleSoft Maintenance Management:

Record Group	Records within Record Group
WM_01	• Work order job and task templates • PCR codes, Problem Group, and Problem Trees • Work Management
WM02	Work order service group
WM03	Work order type
WM05	Work order priority
WM06	WM business unit options
WM07	Work order management status
WM08	Work management crew schedule
FS_18	• Item Master • Manufacturer - Model Relationship
RS_02	Labor Crafts

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Record Group	Records within Record Group
AM_13	• Downtime Reason • Maintenance Type
Ma AM_15	Asset Subtypes

You must follow one rule and guideline to perform setID mapping for work order job and work order task templates.

See Chapter 9, "Defining Work Order Templates," Understanding Work Order Templates, page 239.

PeopleSoft Maintenance Management Installation Options

Select the PeopleSoft Maintenance Management check box on the Installation Options - Products page to enable you to install PeopleSoft Maintenance Management. You must install PeopleSoft Asset Management, Project Costing, and PeopleSoft Purchasing prior to installing PeopleSoft Maintenance Management. Also, if your organization intends to obtain items from PeopleSoft Inventory to use in the repair and maintenance of assets via PeopleSoft Maintenance Management, you should install PeopleSoft Inventory.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Setting Up Application-Specific Installation Options.

Permission Lists, Roles and User Profiles

You must set up permission lists using PeopleTools Security. You then define roles and select permission lists to apply to these roles. Once the roles are set up, you select the roles that apply to specific user profile.

For example, the sample data contains the following permission lists:

- EPPC2100 – Project/Activity Team
- EPPG4000 – Detailed Project Planning
- Work Order Management

The PeopleSoft Maintenance Management sample also has these roles defined:

- Project Manager
- Maintenance Technician
- Maintenance Planner
- Maintenance Supervisor
- Warehouse Clerk
- System Administrator
- Self-Service User

Examples of user profiles are:

- SRVP - Senior Vice Presidents
- SRMGR - Senior Managers

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See *Enterprise PeopleTools PeopleBooks: Security Administration*

PeopleSoft Maintenance Management User Preferences

Your organization may enable specific users to perform selected service request and work order functionality by accessing the User Preferences, Maintenance Management page.

You can read about each option on the User Preferences, Maintenance Management page in the PeopleSoft Enterprise Application Fundamentals PeopleBook by clicking on the link below.

Important! User Preferences is where you determine the time reporting method (Punch Time or Elapsed Time) that applies to the work order labor hours that apply to this user or for the labor hours entered by this user for other users.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

Prerequisites

Set up the following products prior to setting up PeopleSoft Maintenance Management:

- PeopleSoft Asset Management
- Project Costing
- PeopleSoft Purchasing
- (Optional) PeopleSoft Inventory

Defining a Service Request Business Unit

To set up a service request business unit, use the Service Request (BUS_UNIT_TBL_WR) component.

This section provides an overview of service request business units and discusses how to:

- Set up the service request business unit Definition page.
- Select service request fields for audit control.

Understanding Service Request Business Units

The primary purpose of the service request business unit is to separate service requests by request center. The service request business unit consists of two separate pages:

- Definition page.

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Service Request Options, which enable you to set up a default service center and service request priority value of critical, urgent, standard, or low. You also indicate the number of days between completion of a service request and the actual automatic closing of a service request. A requester is notified when a service request is complete and can respond within the number of days entered here if the work was not performed satisfactorily or something more needs to be done. The system also tracks the number of the last service request issued for this service request business unit.

- Audit Control page.

  This page enables you to select the service request fields to audit for changes.

There is no direct correlation between service request business units and work order business units. If an agent creates a work order from a service request, the work order business unit is derived from the problem definition and the service center (location) on the service request. For example, if you create a service request indicating that there is a malfunctioning desktop computer in Pleasanton for the HQ-IT agent, the agent can create a work order using work order business unit US001, which is the business unit for which this problem and service center were defined.

Note. The system does not use the service request business unit to process any accounting transactions.

See Chapter 13, "Creating a Service Request," Understanding Service Request Creation and Use, page 347 and Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," Understanding PCR Setup and Tracking, page 125.

Pages Used to Set Up a Service Request Business Unit

Page Name	Object Name	Navigation	Usage
Definition	BUS_UNIT_TBL_WR	Set Up Financials/Supply Chain, Business Unit Related, Maintenance Management, Service Request Definition	Define service request default values.
Audit Control	WM_AUDIT_CNTRL	Select the Audit Control tab.	Specify fields in a service request to audit.

Setting Up the Service Request Business Unit Definition Page

Access the Service Request Definition page.

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Service Request Definition page

When you set up a new service request business unit, you enter the new business unit number in the Add a New Value page, and when you access the Definition page, you describe this new business unit, select a default setID, and create the business unit using:

Default SetID — Select a setID. You can select a setID that was used to create another business unit, or enter the ID of the business unit in this field and create a new empty setID having the same name as this business unit.

Create BU (create business unit) — Click this button to create a service request business unit. After you create a business unit, this button and the Default SetID field are no longer available on the Definition page.

Service Request Options

Service Center — Select the service center location that you want to display as the default value in the Service Request - Fulfillment Detail page of the Service Request wizard.

Note. You can override this value for a specific user in the User Preferences - Maintenance Management page.

Priority — Select the level of priority to apply to Service Requests created using this service request business unit which include:

- *1 - Critical*
- *2 - Urgent*
- *3 - Standard*
- *4 - Low*

Note. These are system defined values. They are not related to the Priority Code definitions that you set up and use for work orders.

Days to Close — Enter the interim number of days following the completion of the service request that you want to wait before the service request closes. For example, if you indicate *5* days in this field and you are notified on July 1 that the

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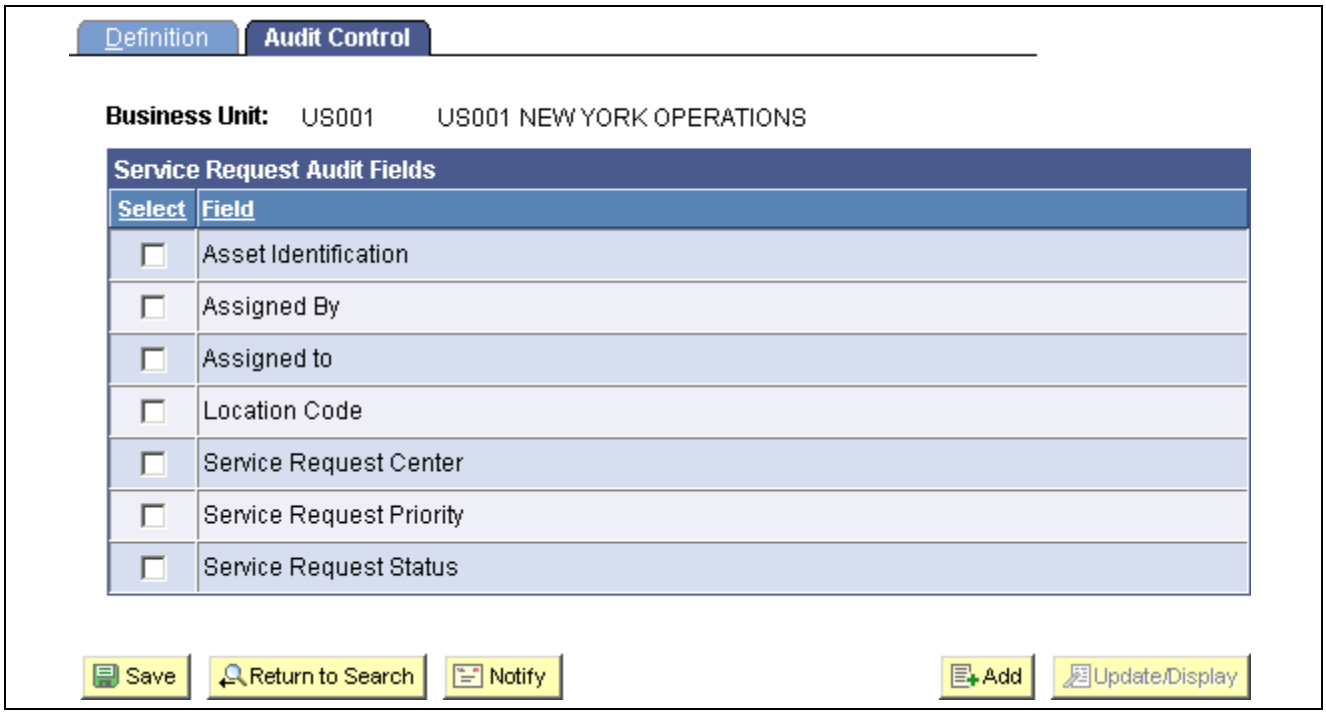
Service Request is complete, then the service request automatically closes on July 6 unless you intervene.

Last Number Enter the number of the last service request number created. This number increments each time a service request is saved.

Selecting Service Request Fields for Audit Control

Access the Audit Control page.



Audit Control page

Service Request Audit Fields Select the service request fields in which you want to audit changes. The fields include:

- Asset Identification.
- Assigned By.
- Assigned To.
- Location Code.
- Service Request Center.
- Service Request Priority.
- Service Request Status.

Setting Up a Work Order Business Unit

To set up a work order business unit use the Work Order Definition (BUS_UNIT_TBL_WM) component.

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This section provides an overview of work order business unit setup and discusses how to:

- Define the work order business unit.
- Set up integration parameters for a work order business unit.
- Enter preventive maintenance parameters for a work order business unit.

Understanding Work Order Business Unit Setup

Work order business units are synonymous with work centers. You can set up as many work order business units as necessary to support your business requirements. The business unit represents the highest level of the default hierarchy within PeopleSoft Maintenance Management, which means that the values specified in a work order business unit are used as default values and controls throughout PeopleSoft Maintenance Management.

The work order business unit consists of three parts, which include:

- The Definition page in which you define information unique to this business unit, set up work order workflow approval and work order access security, select specific set up options and warranty claim information, define default values and default hierarchies, and specify work order numbering characteristics.

  The required fields on this page are Location, GL Business Unit, Base Currency, Rate Type, Service Group, and Accounting Default Order.

- The Integration page in which you identify specific options that enable a business unit to integrate with Project Costing, PeopleSoft Inventory, and PeopleSoft Purchasing and define default labor rates for resources.

  The required fields on this page are Project Costing Business Unit.

  Note. The Inventory business unit and commit rule is only required if you plan to integrate and use PeopleSoft Inventory with PeopleSoft Maintenance Management.

- The PM Options page defines specific options that enable you to use this business unit to enter and process preventive maintenance work orders.

  The required fields on this page are Priority Code, Work Order Type, and Task Status.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," page 57.

GL Business Unit

You must identify a GL business unit for each work order business unit that you set up. This GL business unit serves as the default GL business unit in each of the distribution templates that you set up (Project Costing, PeopleSoft Payables, PeopleSoft Inventory, and PeopleSoft Purchasing). However, the default GL business unit value only appears in the PeopleSoft Purchasing distribution template, because PeopleSoft Purchasing is the only product in which you can override this value.

To process labor costs, you must set up a GL business unit in PeopleSoft Payables that matches the GL business unit that you specify in the work order business unit.

To process inventory costs, you must set up a GL business unit in PeopleSoft Inventory that matches the GL business unit that you specify in the work order business unit.

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Currency Conversion

You must set up a base currency in each work order business unit, which establishes the base currency in the work order. You cannot override this value in the work order. When you create and schedule resources for a work order, the transactions generated in the subsystems based on the work order for PeopleSoft Inventory, PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Asset Management (based on tool rates defined at the shop level) can undergo currency conversions if the base currency in the subsystem differs from the base currency in the work order business unit. When a user closes a work order task or runs the Cost Summarization process in PeopleSoft Maintenance Management to return the actual costs from Project Costing to PeopleSoft Maintenance Management, the costs are converted back to the base currency in the work order.

Note. Currency conversions do not apply to labor costs.

This section discusses:

- Currency conversion for labor costs.
- Currency conversion for inventory costs.
- Currency conversion for purchasing/on-hand costs.
- Currency conversion for tool costs.

Currency Conversion for Labor Costs

You enter time entries for employees based on labor rates set up in PeopleSoft Maintenance Management. These entries use the base currency in the work order. No currency conversion is performed for time recorded. Only the hours and labor rates are provided to Project Costing's cost collection process for the calculation of labor cost.

Currency Conversion for Inventory Costs

When you enter or select an inventory item in the Inventory Requirements and/or Inventory Schedules grids of a work order, PeopleSoft Inventory returns the cost of the item using the base currency in the Inventory business unit. If the base currency for the work order differs from the Inventory base currency, PeopleSoft Maintenance Management converts the cost of the item to the base currency in the work order. When the transactions are sent to PeopleSoft Inventory for processing, they are converted back to the Inventory base currency, which sends them to Project Costing. After Project Costing processes the actual costs and chargebacks in the Inventory base currency, then it sends the actual costs back to the work order, where the PeopleSoft Maintenance Management Cost Summarization process converts the currency back to the base currency in the work order business unit.

For example:

- Work Order Business Unit base currency = EUR
- Inventory Business Unit base currency = USD

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Work Order Task Inventory Scenario	Conversion Activity
1. Schedule Inventory for Work Order Task	1. You select an inventory item ID in the Inventory Schedules grid. The item's cost comes from the setup of the item in Inventory using the Inventory business unit base currency USD. However, the cost of the item is converted to the base currency in the work order business unit (EUR), which appears in the work order Inventory Schedules row. 2. When you enter an Inventory row in the work order, the system converts the cost from the work order base currency (EUR) to the Inventory business unit base currency (USD). 3. PeopleSoft Inventory sends the actual cost of the item to Project Costing in the Inventory business unit base currency (USD). 4. Project Costing calculates any additional costs and performs an necessary pricing (including chargebacks and capitalization) in the Inventory business unit base currency (USD). 5. When you run the Cost Summarization process or close the work order task in PeopleSoft Maintenance Management, the costs appear in the Costs page of the Work Order component and the summary costs in the Chargeback and Capitalization inquiries in the base currency of the work order (EUR).

Currency Conversion for Purchasing/On-Hand Costs

There are several ways to capture purchase/on-hand costs in PeopleSoft Maintenance Management. The currency conversions are based on whether the work order task transaction uses a purchase order or a requisition in Purchasing, or whether the work order transaction came from PeopleSoft Payables.

An example of currency conversions based on Purchasing:

- Work Order Business Unit base currency = EUR
- Purchasing base currency = USD

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Work Order Task Purchasing Scenarios	Conversion Activities
Scenario #1 : You create a Purchase Order or Requisition from the Purchase On-hand/Scheduling grid in the work order. The work order currency = EUR.	1. When the transaction is generated in PeopleSoft Purchasing, it is converted to the base currency for PeopleSoft Purchasing (USD). 2. The actual cost is then sent to Project Costing in the base currency for PeopleSoft Purchasing (USD). 3. Project Costing calculates any additional costs and performs an necessary pricing (including chargebacks and capitalization) in the PeopleSoft Purchasing base currency (USD). 4. When you run the Cost Summarization process or close the work order task in PeopleSoft Maintenance Management, the costs appear in the Costs page of the Work Order component and the summary costs in the Chargeback and Capitalization inquiries in the base currency of the work order (EUR).
Scenario #2: You create either a purchase order, requisition, or procurement card directly in PeopleSoft Purchasing and link it to a scheduling row in the work order task. The transaction initiated in PeopleSoft Purchasing uses the base currency for PeopleSoft Purchasing of USD. However, PeopleSoft Maintenance Management converts the costs from the PeopleSoft Purchasing base currency (USD) to the work order base currency (EUR) to display in the row in the work order task schedule.	1. Since the transactions are created in PeopleSoft Purchasing, they are generated in the based currency for PeopleSoft Purchasing (USD). However, the rows that appear in the Purchase/On-hand Schedules grid of the work order task are converted to the base currency for the work order (EUR). 2. The actual cost generated from the transaction in PeopleSoft Purchasing is sent to Project Costing in the base currency for PeopleSoft Purchasing (USD). 3. Project Costing calculates any additional costs and performs an necessary pricing (including chargebacks and capitalization) in the PeopleSoft Purchasing base currency (USD). 4. When you run the Cost Summarization process or close the work order task in PeopleSoft Maintenance Management, the total actual costs appear in the Cost page of the work order or the Chargeback or Capitalization inquiries in the base currency of the work order (EUR).

An example of PeopleSoft Payables currency conversions:

- Work Order Business Unit base currency = EUR
- PeopleSoft Purchasing base currency = USD
- PeopleSoft Payables base currency = AUD

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Work Order Task/PeopleSoft Payables Scenarios	Conversion Activities
Scenario #1: You copy a requisition or purchase order associated with a work order to a voucher in PeopleSoft Payables.	1. In this scenario the voucher inherits the characteristics of the requisition or purchase order. If the system converted the scheduled costs in the base currency of the work order (EUR) to the base currency in PeopleSoft Purchasing (USD) when the purchase order or requisition was created, then the voucher takes on the base currency of the requisition or purchase order (USD). 2. The actual costs are sent to Project Costing from PeopleSoft Payables in the base currency inherited in the voucher from PeopleSoft Purchasing (USD). 3. Project Costing calculates any additional costs and performs a necessary pricing (including chargebacks and capitalization) in the PeopleSoft Purchasing base currency (USD). 4. When the Cost Summarization process is run or the work order task is closed in PeopleSoft Maintenance Management, then total actual Purchase/On-hand costs in the work order appear in the work order base currency (EUR) in the Costs page of the Work Order component or the summary costs in the Chargeback and Capitalization inquiries.

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Work Order Task/PeopleSoft Payables Scenarios	Conversion Activities
Scenario #2: You copy a requisition or purchase order associated with a work order to a quick invoice in PeopleSoft Payables.	1. Scenario #1 conversion activity rules apply. The base currency for the quick invoice is the same as the requisition or purchase order (USD). 2. The actual costs are sent to Project Costing in the base currency inherited in the quick invoice from PeopleSoft Purchasing (USD). 3. Project Costing calculates any additional costs and performs an necessary pricing (including chargebacks and capitalization) in the PeopleSoft Purchasing base currency, (USD). 4. When the Cost Summarization process is run or the work order task is closed in PeopleSoft Maintenance Management, then total actual Purchase/On-hand costs in the work order appear in the work order base currency (EUR) in the Costs page of the Work Order component and the summary costs in the Chargeback and Capitalization inquiries.
Scenario #3: Manually associate a voucher or a quick invoice in PeopleSoft Payables to a work order where the PeopleSoft Payables base currency is AUD and the work order base currency is EUR.	1. This creates a row in the Purchase On-hand Schedule grid in the work order and displays the costs in the base currency for the work order (EUR). The voucher or express invoice transaction is still (AUD). 2. The actual costs are sent to Project Costing in the base currency (AUD) of the voucher or express invoice. 3. Project Costing calculates any additional costs and performs an necessary pricing (including chargebacks and capitalization) in the PeopleSoft Payables base currency (AUD). 4. When the Cost Summarization process is run or the work order task is closed in PeopleSoft Maintenance Management, then total actual Purchase/On-hand costs in the work order appear in the work order base currency (EUR) in the Costs page of the Work Order component and the summary costs in the Chargeback and Capitalization inquiries.

Currency Conversion for Tool Costs

Tools are set up as assets in PeopleSoft Asset Management's asset repository and normally have a cost rate assigned to them indirectly through the asset type/subtype association. A default currency is set up in the Asset Management business unit. However, you can also specify a default currency, as well as a cost and billing rate for an asset subtype. The default values for currency, cost rate, and billing rate that appear in the work order task schedule line, depend on your selection. When you schedule a tool for a work order task, the system converts the base currency for the asset to the base currency for the work order, which is established in the work order business unit. When a user enters tool usages in the technician workbench, PeopleSoft Maintenance Management calculates the cost of the tools and updates the total actual costs in the Costs page of the work order using the base currency in the work order. Because these costs do not update PeopleSoft Asset Management or Project Costing, they are not converted back to the base currency in PeopleSoft Asset Management.

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Business Unit Setup Options

When you select the check box associated with each of the options listed in the work order business unit, you can:

- Use multiple assets when you create a work order with this business unit.
- Generate chargebacks when you set up the Task Accounting for a work order associated with this business unit.
- Edit ChartFields enables ChartField combination editing in the Inventory, PeopleSoft Purchasing/On-Hand, and Tools distribution rows for each work order task.
- Enter labor requirements, inventory requirements, and tool usage requirements on the Requirements page of a work order.
- Schedule labor, inventory, and tools for a work order.
- Record Actuals tool usage costs, which display in the Cost page of the work order.
- Update assigned tasks in an employee's resource calendar and assigned tools in the tools calendar to enable a scheduler to determine if either type of resource may be available for another assignment.

Work Order Approval

You determine whether a work order requires approval or is pre-approved in the work order business unit. You can override this selection for a specific shop or for a work order type. If you indicate that you want work orders set up with this business unit approved, then you must first perform the setup described in the Configuring Work Order Approval Workflow chapter. Once you have set up work order approval, refer to the Approving Work Orders chapter for details on how to approve each work order.

See Chapter 10, "Configuring Work Order Approval Workflow," page 251.

See Chapter 15, "Approving Work Orders," page 407.

Warranty Claim Information

You can generate warranty claims in PeopleSoft Maintenance Management based on assets that are selected for repair or maintenance in a work order. You can identify the contact information that will appear on warranty claims generated based on assets identified in work orders that are created with this business unit.

See Chapter 16, "Managing Warranty Claims," page 415.

Technician WO Security

You can authorize specific users in the User Preferences - Maintenance Management page to select the Apply WO Access Security option. If you select this option for a specific user, then the user's access to work order tasks in the Technician Workbench and to express work orders depends on the option that was selected in the work order business unit that was used to create the work orders. If you do not select the Apply WO Access Security check box in User Preferences, then the user has full access to work orders and work order tasks in the Technician Workbench and to express work orders. If the Apply WO Access Security check box is selected in User Preferences, you must select one of the options in the work order business unit, which include:

- Full Access

  When you select the *Full Access* option in the work order business unit, any PeopleSoft Maintenance Management resources can access any express work orders, which are created with this business unit, and any work order tasks on the Technician Workbench, which are created with this business unit, as long as the Allow Access to Other's Tasks check box is selected in the User Preferences - Maintenance Management page.

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- Shop

  When you select this option and create a work order using this business unit, the shop entered for the work order appears as a default value on the Work Order Access page. You access this page in a work order when you click the Technician Work Order Access link on the Miscellaneous page. If technicians from other shops will be assigned to the work order and you want to allow resources associated with their shop to access tasks on the Technician Workbench, you can add one or more of shops to the Work Order Access page. Each shop that you add to the Work Order Access page enables anyone assigned to the added shop to access tasks associated with that work order on the Technician Workbench and Express Work Order. If you add a cross-shop resource (a shop other than the shop specified for the work order), the system automatically adds the cross-shop to the list on the Work Order Access page. Shop security applies to work order-managed work orders and Project Costing-managed work orders.

  Also, if you select this option, only resources that belong to the shop specified in the Express Work Order can access the Express Work Order.

- Resource Pool

  Resource pools are set up in PeopleSoft Resource Management for use in PeopleSoft Program Management and Project Costing. A resource pool consists of a specific group of resources that you can assign to a project from PeopleSoft Program Management. Resource pools enable Project Managers to assign resources more efficiently by not having to assign one resource at a time to a project. If you select this option and create a work order using this business unit and a project and activity that is associated with a resource pool, then only the members of the resource pool associated with that project and activity can access those tasks on an express work order or on the Technician workbench. For example, you set up a resource pool (Pool A with the resources John Jones, Earl Green, Regina Smith, and Eric Lasser))and assign the pool to a project (MM001) and activity (0001) in PeopleSoft Program Management. You select this option for work order business unit US001. You create five work orders using work order business unit US001. Each work order has 3 tasks associated with Project MM001 and activity 0001. Only resources John Jones, Earl Green, Regina Smith, and Eric Lasser can access all the tasks for the five work orders in the Technician Workbench.

  Note. You can assign generic resources to resource pools in PeopleSoft Resource Management.

  Important! The resource pools associated with projects and activities must be up to date in order to use resource pool security in PeopleSoft Maintenance Management. You typically set up projects and activities associated with Project Costing-managed work orders ahead of time, which remain stable over the life of the associated work orders. The pool cache table stores data at the project, activity, and resource level. However, since the activities for work orders associated with work order-managed projects are created when the work order task is created, the pool cache table will not reflect the latest valid combinations of resource, project, and activity unless you run the pool cache Refresh process using the Program Management, Program Tools, Enforce Team Pool Refresh process to enable resource pool security.

- Shop and Resource Pool

  Selecting this option limits an employee (technician) access to work order tasks on the Technician Workbench and express work orders based on whether the employee is part of a resource pool that is associated with the project and activity that was used to create the work order, or whether the employee is a member of any shops specified on the Work Order Access page or the shop that is used to create an express work order.

  Note. The default shop for the work order automatically appears on the Work Order Access page, which is accessed from the Miscellaneous page of the work order.

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After you select one of these options in the work order business unit and you create a work order using this business unit, you can click on the Technician Work Order Access link on the Miscellaneous page of the work order and add any shops to the Work Order Access table. This enables the resources from the specified shop access to the Technician Workbench and to search for express work orders.

Important! You can disable work order access security on an individual basis by removing the check mark from the Allow Access to WO Security check box on the User Preferences-Maintenance Management page.

See *PeopleSoft Enterprise Program Management 9.0 PeopleBook*, "Managing Programs and Projects," Establishing Resource Pool Security.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," PeopleSoft Maintenance Management Integration with PeopleSoft Project Costing, page 18.

Work Order Business Unit Defaults and Default Hierarchies

You can set up specific values in the work order business unit that you want to display as default values in the work order. You can also set up different default hierarchies that use a weighting formula (algorithm) to determine which setup data to use as default data in the work order.

Work Order Business Unit Default Values

You can enter the default field values in the work order business unit that you want to display in fields in the work order. These fields include:

- Service Group

  When you create a work order using this business unit, the service group value that you enter in the work order business unit becomes the default value for the service group field in the work order header.

  You can override this value in the work order.

- Shop

  When you create a work order using this business unit, the shop value that you enter in the work order business unit becomes the default value for the shop field in the work order header.

  You can override this value in the work order.

  Important! When you add a new work order business unit you have not set up your shop(s) for that business unit. Therefore, you bypass this fieldwhen creating a new business unit and return to it after creating the shops that you want to associate with this business unit.

- Close Days

  When you complete a work order task in a work order that was created with this business unit, the system uses the default value that you enter here in the work order business unit to determine the number of days between the completion and the close of a work order task.

  You can override this value for a specific work order type.

- Asset Lookup Field

  When you create a work order with this business unit, the lookup field value (Asset ID, Serial ID, Tag Number, or Vehicle ID Number) that you select for this business unit displays as part of the asset specifications on the work order and work order tasks.

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- Maintenance Type

  This value displays in the Maintenance Type field on the Miscellaneous page of the work order. You can override this value in the work order. If you use this business unit to create preventive maintenance work orders, you must specify a maintenance type in the work order in order to close the work order. Entering a default value in this field for the business unit helps prevent any problems at closing.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Setting Up PeopleSoft Maintenance Management Work Order Parameters, page 108.

Work Order Business Unit Default Hierarchies

You can also set up default hierarchies in a work order business unit to determine the various types of data that you want to display in a work order. The default hierarchies include:

- Control Default Order
- Project Default Order
- Accounting Default Order

Control Default Order

Control Default Order is used to determine the default data that you want to use for work order control procedures such as work order close and work order approvals. You can choose from two different default hierarchies:

- Unit, WO Type, Shop.

  In this hierarchy, the system checks the default values for a work order created with this business unit based on the following order:

  1. Shop.
  2. Work order type.
  3. WO business unit.

- Unit, Shop, WO Type.

  In this hierarchy, the system checks the default values for a work order created with this business unit based on the following order:

  1. Work order type.
  2. Shop.
  3. WO business unit.

Important! There must be a specified value in a level for one level to override another level. For example, if you specified at the shop level that you want the work order approved, and you either do not specify a value or select default for the work order type, the system ignores the work order type and looks at the default value specified in the work order business unit. If the value specified in the work order business unit is Pre-Approved, since the shop's value takes precedence over the value in the business unit based on the default hierarchy, then the system applies the shop's value, which requires work order approval to any work order created with the specific business unit and shop.

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Project Default Order

Project Default Order is used to determine the default project to use in a work order created with this business unit using values specified in the Associate Projects component, as well as values specified in the Project Costing ChartField distribution template. Both the Associate Projects component and the Default PC ChartFields component are set up based on the value specified for the business unit, service group, and work order type. In this case, a formula is applied to these values to determine the default level. You can choose from two different hierarchies:

- Unit, Service Group, Type.
- Unit, Type, Service Group.

You can set up the Default PC ChartFields component based on various combinations of service group and work order type. For example, you could set up the Default PC ChartFields component with these values:

- WO BU 01, Service Group %, Work Order Type %
- WO BU 01, Service Group MAINT, Work Order Type %
- WO BU 01, Service Group MAINT, Work Order Type CAPT

Since there can be numerous combinations, the system needs some method to determine which Project Costing ChartFields to use as default values in the work order. It determines the default values based on the following formula and based on the combination that you select in the work order business unit. This is also the way the default project is determined based on the setup of the Associate Projects component.

The formula to determine the default project ID in the work order is:

$1x_1+2x_2$ = Default Row Value

Where:

For: x_1 If value is % (wildcard) then $x_1= 0$ Or: If value is not % (wildcard) then $x_1= 1$

Where:

For $2x_2$If value is % (wildcard) then $x_2= 0$ or If value is not % (wildcard) then $x_2= 1$

For example, if you select the Project Default Order in the work order business unit as Unit, Service Group, Type, and the rows that you set up in Associate Projects contain the information in the following table. Based on your selection in the work order business unit, the Service Group value is $1x_1$ and the Work Order Type value is $2x_2$ in the formula. When the system applies the formula, the default Project ID in the work order would be PC002, because the sum of the values in Row #2 = 2, which is greater than the sum in Row #1 (0) or Row #3 (1).

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Row #	WO BU	WO Type Value for $2x_2$	Service Group Value for$1x_1$	Default Project ID Specified in Associate Projects
1	WO BU1	% = 0 2 x 0= 0	% = 0 1 x 0= 0	PC001 Formula applied: 0 + 0 = 0 SUM = 0
2	WO BU1	ADHOC = 1 2 x 1= 2	% = 0 1 x 0= 0	PC002 Formula applied: 2 + 0 = 2 SUM = 2
3	WO BU1	% =0 2 x 0= 0	Maintenance = 1 1 x 1= 1	PC003 Formula applies: 0 + 1 = 1 SUM = 1

If you select the Project Default Order as Unit, Type, Service Group, then the Service Group = $2x_2$ and the Work Order Type = $1x_1$, then when you apply the formula to the same rows, then Row #1 = 0, Row #2 = 1, and Row #3 = 2.

Therefore, the default Project ID based on Unit, Type, Service Group in the work order is PC003 in Row #3, which is the row with the greatest value.

Once the default Project ID is selected, the system uses the Project Default Order that you select in the work order business unit and applies the formula again to the PC Default ChartFields component to determine which row containing default Project Costing ChartField values for the default project ID has the highest calculated value. This row contains the defaulting Project Costing ChartField values that display in the work order task when you click the Distribution link for a work order task.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Project Defaulting and Capitalization Rules in PeopleSoft Maintenance Management, page 114 and Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Associating Projects with a Work Order Business Unit, Work Order Type, and Service Group, page 116.

Accounting Default Order

Accounting Default Order is used to determine the default ChartField distribution template to use in the work order based on the values set up in the Distribution Template Rules component. There are seven values to which you can assign default attribute levels from 1 to 7, where 1 is the lowest and 7 is the highest. These default attributes include:

- Service Group.
- Work Order Type.
- Asset Type.
- Asset Subtype.

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- Asset Location.
- Asset ID.
- Asset Unit.

Important! You must assign a numeric value to each of the seven attributes, with no duplicate values allowed. For example, you cannot assign a numerical value of *2* to Asset Type and Asset Location. The values must each be different. You cannot save the work order business unit unless you assign these values.

The formula to determine the default ChartField Distribution Template in a work order works basically the same way as the Project Order Default.

The formula to apply to the default values for the Accounting Default Order is:

$1x_1+2x_2+3x_3+4x_4+5x_5+6x_6+7x_7$= Default Row Value

$1x_1+2x_2$ = Default Row Value

Where:

For x_1: If value is % (wildcard) then x_1= 0 Or:If value is not % then x_1= 1

Where:

For x_2: If value is % (wildcard) then x_2= 0 Or: If value is not % then x_1= 1

Where:

For x_3: If value is % (wildcard) then x_3= 0 Or: If value is not % then x_1= 1

Where:

For x_4: If value is % (wildcard) then x_4= 0 Or: If value is not % then x_1= 1

Where:

For x_5: If value is % (wildcard) then x_5= 0 Or: If value is not % then x_1= 1

Where:

For x_6: If value is % (wildcard) then x_6= 0 Or: If value is not % then x_1= 1

Where:

For x_7: If value is % (wildcard) then x_7= 0 Or: If value is not % then x_1= 1

For example, if you set up the values in the work order business unit and sequence them in the following order:

1. Service Group =

   x_1

2. Work Order Type =

   x_2

3. Asset ID =

   x_3

4. Asset Subtype =

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x_4

5. Asset Type =

   x_5

6. Asset Location.

   x_6

7. Asset Unit =

   x_7

The rows that you set up in the Distribution Template Rules contain the following values and the formula calculated for each value. In this example the default Distribution Template in the work order would be FLEET because the sum of the values = 13.

Serv Grp x_1	WO Type x_2	Asset Type X_5	Asset Subtype x_4	AM BU x_7	Asset ID.x_3	Loc. x_6	Dist. Temp.
% 1 x 0= 0	% 2 x 0= 0	% 5 x 0= 0	0	% 7 x 0=0	% 3 x 0= 0	% 6 x 0 = 0	MAIN SUM = 0
MAINT 1 x 1 = 1	% 2 x 0= 0	Fleet 5 x 1= 5	0	% 7 x 1= 7	% 3 x 0 = 0	% 6 x 0 = 0	FLEET SUM = 13
% 1 x 0 = 1	CAPT 2 x 0= 0	IT HW 5 x 1= 5	0	% 7 x 0 = 0	% 3 x 0 = 0	% 6 x 0 = 0	ITAM SUM = 6

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Understanding ChartField Distribution Setup in PeopleSoft Maintenance Management, page 120.

Work Order Business Unit Integration Options

You set up specific options in the Integration page of the work order business unit for Project Costing, PeopleSoft Inventory, and PeopleSoft Purchasing.

You can also set up labor cost and bill rates that serve as default values in the labor requirements or labor schedule for a work order created with this business unit. You can override these labor rates in the shop.

Work Order Business Unit and Project Costing Integration Options

You must indicate the Project Costing business unit that will be used to create both work order managed and project costing projects in Project Costing. This business unit serves as the default value in the work order, the Associate Projects component, and the Work Order Task Accounting page.

You also indicate whether you plan to use a rate plan or rate sets for calculating chargebacks and other costs.

Rate sets enable you to create transaction rows for use in costing, billing, revenue recognition, or reporting, from incoming or existing transactions in the Project Transaction table. Rate sets have two parts: The source criteria that the Pricing process uses to compare against cost transactions coming in from feeder systems. The target definition of the cost, billing, or revenue recognition row that the Pricing process creates. When an incoming cost transaction matches the source criteria, the Pricing process creates a new transaction row for every target row on the rate set. You can assign the same rate set to multiple rate plans.

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A rate plan is a collection of rate sets that the system executes in a specified order. Use rate plans to link rate sets so that priced rows from one rate set are used to create additional priced rows from the next rate set. For example, you can add additional expenses, such as administrative costs or overhead, to cost transactions before they are priced for billing or revenue. The Pricing process uses the rate plan to determine which rate sets to run and in what sequence to run them. When setting up the rate plan, you can assign rate sets in any combination of rate definition types—cost, billing, and revenue.

Work Order Business Unit and PeopleSoft Inventory Integration Options

You set up the Inventory business unit, the Inventory Commit rule, and the Work Order Reservation rule in the Integration page of the work order business unit.

The Inventory business unit serves as the default value when you select an item in the Inventory Requirements and Inventory Schedules grids. The setID associated with the Inventory business unit must match the setID associated with this work order business unit.

You specify a Commit rule to determine the point when you want to commit (recognize work order demand) the selected items to PeopleSoft Inventory, which means the point at which you want PeopleSoft Inventory to recognize the work order task demand for the item. Commit rules can be set up at the business unit level, the shop level, and the shop/work order type level within a shop. The rule you select applies to all work orders created with this business unit, shop, or shop/type. You can select one of the following Commitment rules, which include:

- Commit at Reserve

  Selecting this Commit rule enables you to defer committing the item(s) to PeopleSoft Inventory until the time you choose to reserve the item(s).

- Parts List

  The addition of an inventory item to the parts list, which means that Items are committed when they have been added to the Inventory Schedules grid and a save has been issued. Each subsequent part that is added and saved on the work order task will commit the item to PeopleSoft Inventory.

- Picking Plan

  Items are committed when a Picking Plan is created. A picking plan consists of the parts or inventory items that are added to a list, which direct inventory personnel to the storage locations for the items that they need to pick for the work order task. This option delays committing of the inventory items until you are ready to have them picked and available to begin working the work order.

- Work Order Status Change

  Items are committed when the work order task status is changed to an internal status of *Awaiting Schedule, Scheduled, or Work in Progress.*

You can also reserve inventory items, which are selected for a work order task, based upon your selection of a Work Order Reservation rule, which works in combination with the selected Commit rule. Work Order Reservation rules can be set up at the business unit level, the shop level, and the shop/work order type within the shop level. Inventory items must be committed before or at the same as they are reserved. The system will verify the valid combinations that can be set up for the commit and reservation rules that are chosen. The available values to select from for both commit and reservation rules will be filtered down to the applicable/acceptable valid values to ensure that you cannot establish invalid combinations of commit and reservation rules. The Work Order Reservation rules include:

- Batch Reserve Only

  When the batch process is run, the rows will be reserved.

- Parts List Creation

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When the parts (items) in the work order task are saved, the parts (items) are reserved.

- Pick Plan Creation

  When the picking plan is created, the part (item) is reserved.

- Work Order Status Change

  When the status of the work order task is changed to *Awaiting Schedule,Scheduled, or Work in Progress,* the parts (items) are reserved.

You also specify a priority number between 1 and 999 for work order reservations. PeopleSoft Inventory uses this number to sort demand and prioritize it accordingly, with 1 being the highest or most important priority and 999 being the lowest or least important priority. This number displays as a default value in the Inventory Schedules grid.

The selected Commit rule and the Work Order Reservation rule combination must be valid.

The values that display on the Reserve Rule/Status dropdown list depend on the value(s) that you selected for the Commit Rule/Status. If you change the Commit Rule/Status or change the default flag from *Specify* to *Default* on the shop header or shop/type pages and the current Reserve Rule/Status becomes invalid, the Reserve Rule/Status field is blanked out and a message is issued instructing you to specify a new Reserve Rule/Status from the updated list of valid choices.

Note. Depending on the changes you make, other restrictions may apply to limit work order business unit rule/status values from invalidating a lower-level shop header or shop/type definition that depend on the current work order business unit values.

Valid edit combinations are:

1. Commit rule = Parts List

   Reservation rule = Parts List.

2. Commit rule = Parts List
   - Reservation rule = Status Change = any 3 statuses
   - Reservation rule = Pick Plan
   - Reservation rule = Batch Only
3. Commit rule = Status Change = Awaiting Schedule
   - Reservation rule = Awaiting Schedule or Scheduled or Work in Progress
   - Reservation rule = Pick Plan
   - Reservation rule = Batch Only
4. Commit rule = Status Change = Scheduled
   - Reservation rule = Scheduled, Work in Progress
   - Reservation rule = Pick Plan
   - Reservation rule = Batch Only
5. Commit rule = Status Change = Work in Progress
   - Reservation rule = Work in Progress
   - Reservation rule = Pick Plan
   - Reservation rule = Batch Only

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6. Commit rule = Pick Plan

   Reservation rule = Pick Plan

7. Commit rule = Commit at Reserve

   Reservation rule = All rules

then this indicates that there is at least one lower-level Shop or Shop/Type definition associated with (keyed by) this WO BU that depends on the current WO BU rule settings. The User may have to first reset the dependent Shop-level definition(s), before making the desired rule change to the WO BU.

Important! The edit ensures that the commit of items occurs prior to or at the same time as execution of the reservation rule. If the WO Status Change option is selected for both the commit and the reserve rule, then the reserve rule's internal status must be later than or the same as the commit rule's internal status.

If fewer values appear than usual on the commit rule dropdown list (less than 3 for commit rule, 4 for internal status), or the reserve rule dropdown list (fewer internal statuses based on Important rule above), then at least one shop or shop/type level setting depends on the current work order business unit setting. You may need to reset Inventory/Commit Rule Reservation at the shop or shop/type level before you can make changes to the rules at the work order business unit level.

Note. The batch reservation process will only reserve committed work order rows. If a reservation rule implies on-line reserve and the row(s) could not be reserved, a status TBD (to be determined) by Inventory will dictate if the batch reservation process will pick up the row(s).

Work Order Business Unit and the PeopleSoft Purchasing Integration Option

You determine in the work order business unit whether you want to use purchase orders to purchase labor, non-inventory and open description materials, and tools for a work order, or whether you want to use requisitions. When you set up requirements and scheduling for a work order created with this business unit, you can purchase items based only on the option you choose for this business unit.

If you do not want to use purchase orders or requisitions, you can select the blank space to leave the field blank or select *None*. This setup hides the Load Purchase/Load Requisition button on Purchase/On-hand Schedules section of the Schedules page.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," PeopleSoft Maintenance Management Integration with PeopleSoft Purchasing and PeopleSoft Payables, page 24.

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Pages Used to Set Up a Work Order Business Unit

Page Name	Object Name	Navigation	Usage
Work Order - Definition	BUS_UNIT_TBL_WM1	Set Up Financials/Supply Chain, Business Unit Related, Maintenance Management, Work Order Definition, Definition	Enables users to define a work order business unit as a work center for an organization, set up accounting parameters including integration with the GL business unit, identify specific PeopleSoft Maintenance Management setup options, establish default values for the work order and work order task, and set up auto-numbering of work orders.
Warranty Claim Information	WM_BU_CLAIM_SEC	Click the Warranty Claim Information link on the Work Order Definition page.	Enter the contact information required to file a warranty claim for work orders associated with this business unit.
Integration	BUS_UNIT_TBL_WM2	Select the Integration tab.	Identify Project Costing, Inventory, and PeopleSoft Purchasing integration parameters.
PM Options	BUS_UNIT_TBL_WM3	Select the PM Options tab.	Identify parameters specific to Preventative Maintenance Work Orders.

Defining the Work Order Business Unit

Access the Work Order - Definition page.

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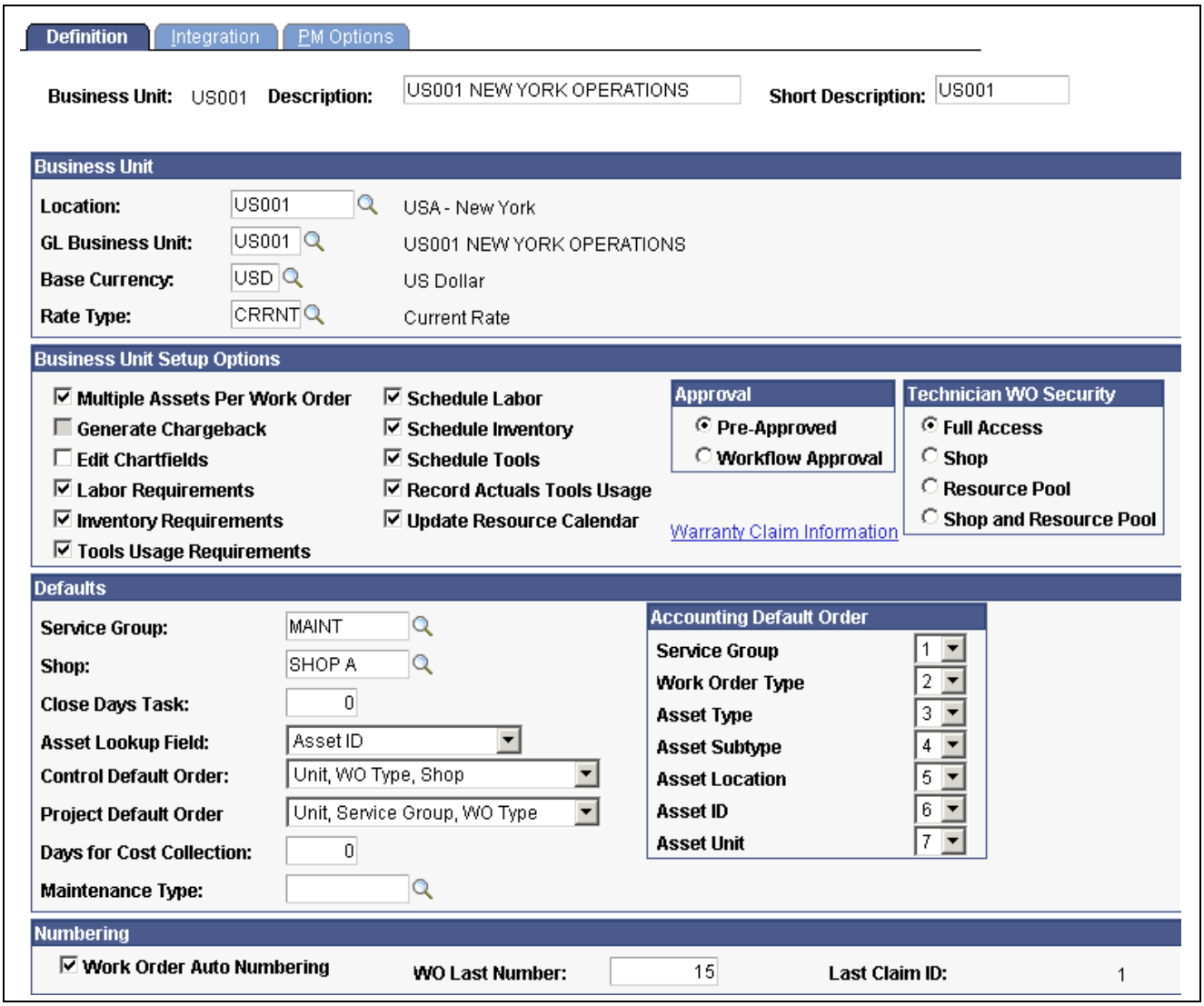

Work Order - Definition page

When you set up a new work order business unit, you enter the new business unit number in the Add a New Value page and, when you access the Definition page, you describe this new business unit, associate a setID, and create the business unit.

Business Unit

Location Select the location of this work order business unit. This is a required field.

GL Business Unit Select the General Ledger business unit, which serves as a default value for the GL business units set up in the PeopleSoft Maintenance Management ChartField distribution templates that you set up later in this chapter. This is a required field.

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Note. You can change this default GL business unit for PeopleSoft Purchasing rows only on the distribution template. You cannot change this default GL business unit for PeopleSoft Inventory, PeopleSoft Payables, Project Costing integration module rows on the distribution templates. This default GL business unit displays in the distribution page accessed from the labor, inventory, purchasing/on-hand, and tools Distribution tab in the work order schedule grids.

Base Currency Select the work order business unit base currency to use for currency conversions in work order transactions. Work order costs always display this currency in PeopleSoft Maintenance Management, even if the costs are calculated in another currency by an integrated product or Project Costing. This is a required field.

Rate Type Select the type of rate to use to calculate conversions to the base currency for work order transactions. This is a required field.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Currency Conversion, page 76.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

Business Unit Setup Options

Select the options that you want to apply to your work order transactions.

Multiple Assets Per Work Order Select this check box to enable you to enter a different asset from task to task. If you leave this check box blank, you can only enter an asset identification value at the work order header level. The fields for asset identification, Asset Management business unit, location, and others will not appear on the tasks. The system applies the asset defined in the work order header to each work order task.

In you intend to create work orders to perform the changeout of an asset's component, then you must select this check box. This is because you must identify more than one asset to perform a component changeout.

Important! This rule concerning multiple assets per work order does not apply to preventive maintenance work orders. You can create a preventive maintenance work order for a loop composed of multiple assets regardless of whether or not this check box is selected.

See Chapter 20, "Understanding Asset Retirement and Component Changeout in PeopleSoft Maintenance Management," Component Changeout in PeopleSoft Maintenance Management, page 593.

Generate Chargeback Select this option to enable chargebacks, which is the recovery of costs from another organization, such as the business unit, operating unit, department, fund, and more, for any work orders associated with this business unit. Selecting this option enables the chargeback check box on the Task Accounting page.

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Note. To activate the chargeback check box on the Work Order Task Accounting page, you must select this option and select the Organization option in the Installation Options component.

Note. You can override this specification for a shop at the shop level and for a work order type at the work order type level.

Edit Chartfields Select this check box to enable users to edit ChartField distribution values in the work order task.

Labor Requirements Select this check box to enable users to access the Labor Requirements grid in a work order that you created using this business unit, and calculate the estimated costs for the Labor resource requirements for each work order task. If you clear the check box, you cannot access the Labor Requirements grid in the Work Order component.

Note. You can override this field at the shop level.

See Chapter 17, "Defining Work Order Task Requirements," Labor Requirements, page 426.

Inventory Requirements Select this check box to enable users to access the Inventory Requirements grid in the work order created using this business unit and calculate the estimated costs for the inventory resource requirements for each work order task. If you clear the check box, you cannot access the Inventory Requirements grid in the Work Order component.

Note. You can override this field at the shop level.

See Chapter 17, "Defining Work Order Task Requirements," Inventory Requirements, page 427.

Tools Usage Requirements Select this check box to enable users to access the Tool Requirements grid in the work order created using this business unit and calculate the estimated costs for the Tool resource requirements for each work order task. If you clear the check box, you cannot access the Tool Requirements grid in the Work Order component.

Note. You can override this field at the shop level.

See Chapter 17, "Defining Work Order Task Requirements," Tool Resource Requirements, page 429.

Schedule Labor, Schedule Inventory, and **Schedule Tools** Select the applicable check boxes based on your business needs to enable a scheduler to schedule the various resources for labor, inventory, and tool transactions in the Schedules page of the Work Order component.

Note. You can override these selections at the shop level.

See Chapter 18, "Scheduling a Work Order," page 443.

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Record Actuals Tools Usage Select this option to process actual tools usage costs for any work orders using this business unit. These actual costs are generated in PeopleSoft Project Costing and display in the Cost page of the work order

Note. The requirement for recording tools actuals is optional because some organizations do not record the use of tools that are involved in repairing an asset. However, all labor and material actuals are always recorded if used for a work order task. You can override this selection for a shop at the shop level.

See Chapter 21, "Executing and Completing Work Orders," Tools Usage, page 602.

Update Resource Calendar Select this option to enable a user to update the employee and tool resource calendars to free resources to perform other work if they have completed these work assignments earlier than scheduled.

Note. This option is only available for selection if the Schedule Labor and Schedule Tools check boxes above are selected. You can override this selection for a shop at the shop level.

See Chapter 18, "Scheduling a Work Order," Understanding Resource Scheduling, page 443.

Approval Select:

- Pre-Approved if the work orders that you create using this business unit do not require further workflow approval.
- Workflow Approval if the work orders that you create using this business unit require approval by one or more parties. You must also set up work order approval workflow.

Note. You can override this selection at the shop level and the work order type level.

See Chapter 10, "Configuring Work Order Approval Workflow," Understanding the Work Order Approval Workflow Architecture, page 251.

See Chapter 15, "Approving Work Orders," Understanding the Work Order Approval Process, page 407.

Technician WO Security(technician work order security) Select one of the following options to enable resources to have access to express work orders and work orders in the Technician Workbench:

- Full Access

  Resources can access all express work orders created with this business unit and all work order tasks created with this business unit that appear in the Technician Workbench as long as the Allow Access to Other's Tasks check box is selected for each user on the User Preferences - Maintenance Management page.

- Shop

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Resources can only access express work orders and work order tasks in the Technician Workbench based on the shops that you add to the Work Order Access page in the work order using the Technician Work Order Access link on the Miscellaneous page of the work order. The default shop used to create a work order is automatically added to this page, as are any cross-shop labor resources. In addition, only resources of the default shop used to create an express work order can access the express work order.

- Resource Pool

  Resources specified in one or more resource pools assigned to the project and activities associated with one or more work orders can access these work orders and work order tasks in the Technician Workbench. The resource pool members can also access express work orders, which are created with the project and activity in which the resource pool is associated. .

- Shop and Resource Pool

  This option allows access to work orders and work order tasks in the Technician Workbench and to express work orders based on both security methods described above.

Warranty Claim Information

Click this link to access the Warranty Claim Information page, where you can identify the business unit's contact information that will appear on warranty claims generated from work orders created with this business unit.

See Chapter 16, "Managing Warranty Claims," Understanding Warranty Claim Management in PeopleSoft Maintenance Management, page 415.

Defaults

Define each of these fields to use as default fields on a work order associated with this business unit. You can override these values when you enter a work order.

Service Group

Select the service group that you want to appear as the default value in any work order associated with this business unit. This is the only level in which you can set up Service Group as a default value.

You can use the service group value to set up your own supplemental data that further describes the service group. For example, if you select *ITAM* as the default service group value, you can create additional supplemental data fields related to peripheral devices that accompany a computer such as an external hard drive, mouse, and keyboard. When you select the ITAM service group to create a work order, then these supplemental fields will also display in the work order.

This is a required field to enable a service group default value to appear in a preventive maintenance work order.

See Chapter 24, "Using Supplemental Data," Understanding Supplemental Data, page 653.

Shop

Select the shop value that you want to display as the default value on the search page when you create a work order. You can override this value in the work order.

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Note. You must set up the business unit first and then set up shops using this business unit. Once your shops are set up, you should return to the business unit and enter a default shop value.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Shifts, Schedule Patterns and Periods, Shops, and Crews, page 194.

Close Days Task Enter the interim number of days between the completion of a work order task and the automatic closure of the task.

Note. You can override this value at the Work Order Type level. In addition, you can manually close a work order task before this time interval expires.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Creating Work Order Types, page 110.

Asset Lookup Field Select one of the values listed below for this field. The selected value displays as the field name from which you select an asset's specific value in the Asset Information section of the work order header and the work order task for any work order associated with this business unit.

- *Asset ID*
- *Serial ID*
- *Tag Number*
- *Vehicle ID Number*

Control Default Order Select the order in which the system checks for specified data.

- *Unit, Shop, Type*
- *Unit, Type, Shop*

Project Default Order Select the order in which the system checks for ChartField distribution and project ID default values. The changes in this hierarchy are based on the order of the service group and the work order type:

- *Unit, Service Group, Type*
- *Unit, Type, Service Group*

Days for Cost Collection Enter the number of days that you want the collection of costs to continue after the work order is closed.

Maintenance Type Select a default maintenance type value to display in the Maintenance Type field on the Miscellaneous page of the Work Order component. If you generate preventive maintenance work orders, a maintenance type is required on the work order in order to close the work order.

Accounting Default Order Select a sequence number for each of the values listed to establish the default order for each value, which includes:

- Service Type.
- Work Order Type.
- Asset Type.

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- Asset Subtype.
- Asset Location.
- Asset ID.
- Asset Unit.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Defaults and Default Hierarchies, page 83.

Numbering

Work Order Auto Numbering (work order automatic numbering)
Select this check box to automatically generate work order numbers for each work order created. If you do not enter a number, the system creates *NEXT* as the default WO ID value. When the work order is saved, a number displays for the Work Order ID, which is the WO Last Number plus one.

Even if you select this check box, you can still enter a work order number manually in the search page WO ID field. However, if you do not select this check box, the system does not generate a WO ID automatically.

WO Last Number(work order last number)
Stores the number of the last work order ID number that was created for this business unit if you selected the Work Order Auto Numbering check box.

Last Claim ID
Identifies the last warranty claim ID number generated for work orders associated with this business unit.

Setting Up Integration Parameters for a Work Order Business Unit

Access the Work Order - Integration page.

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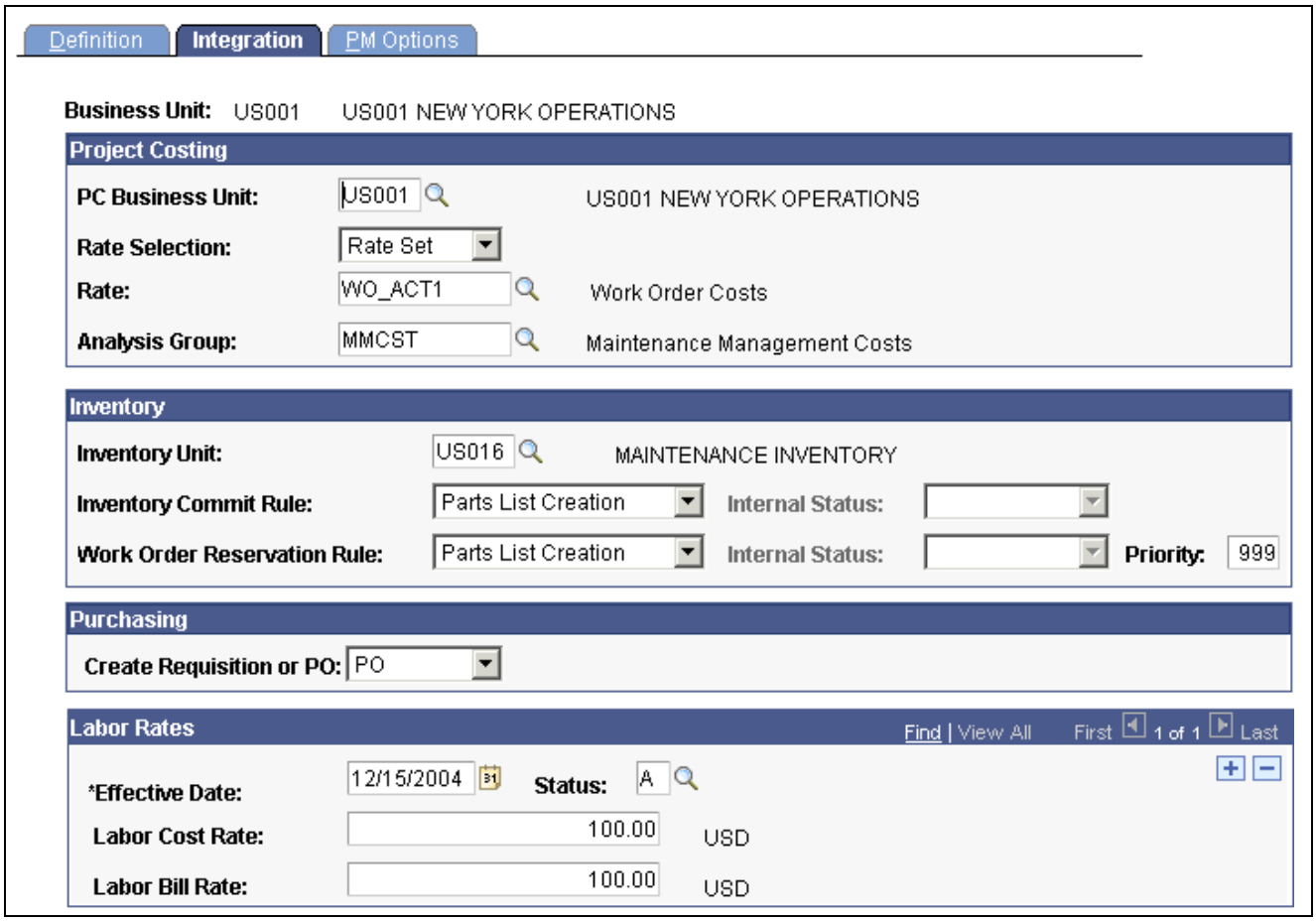

Work Order - Integration page

PeopleSoft Project Costing

This section links any work order associated with this business unit to PeopleSoft Project Costing so that PeopleSoft Project Costing can serve as the cost repository for all work order costs, which includes the calculation and capitalization costs of assets. PeopleSoft Project Costing also calculates chargebacks and sends them to the appropriate GL business unit.

PC Business Unit (Project Costing business unit)

Enter or select the Project Costing business unit that you want to use to track costs incurred for work orders associated with this work order business unit. This is a required field.

Note. You can use this Project Costing business unit to set up the Resource Management business unit that is required for setting up resources in PeopleSoft Maintenance Management.

Rate Selection

Select one of the following values:

- *Rate Plan*

  A rate plan is a collection of rate sets that the system executes in a specified order. Use rate plans to link rate sets so that priced rows from one rate set are used to create additional priced rows from the next rate set.

- *Rate Set*

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Rate sets enable you to create transaction rows for use in costing, billing, revenue recognition, or reporting, from incoming or existing transactions in the Project Transaction table.

Rate Select a rate plan or a rate set from PeopleSoft Project Costing to use as the default value in the work order task for calculating chargebacks. If you select Rate Set, select from a list of values, which are user-defined in PeopleSoft Project Costing.

For example:

- ACT (Actual Cost)
- TUG_ACT (Tool Usage Actual Costs)
- TUG_BIL (Tool Usage Billing)

If you select Rate Plan, select from a list of values, which are user-defined in PeopleSoft Project Costing.

For example:

- PM_BIL_CST (Program Management Bill and Cost)
- PM_BIL_ONLY (Program Management Bill Only)
- PM_CST_ONLY (Program Management Cost Only)

Analysis Group Defines the PeopleSoft Project Costing analysis group that is used by the Cost Collection process in PeopleSoft Maintenance Management to gather costs from PeopleSoft Project Costing into PeopleSoft Maintenance Management.

Note. Analysis Groups are set up in PeopleSoft Project Costing.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up PeopleSoft Project Costing Control Data," Analysis Groups.

Inventory

These fields only display if Inventory is installed.

Inventory Unit Enter or select an Inventory business unit if you plan to issue parts from PeopleSoft Inventory to work orders. This business unit appears in the Inventory Requirements - Default Settings and in the Inventory Schedules - Default Settings fields of the work order. This is the only Inventory business unit that can issue parts directly to the work order. The setID for the work order business unit must match the setID for the Inventory business unit. The system runs an edit to ensure that these setIDs match. In addition, you can only use an Inventory business unit in which the GL business unit is the same as the GL business unit in the work order.

Note. You should enter this field if you plan to use PeopleSoft Enterprise Inventory with PeopleSoft Maintenance Management.

Inventory Commit Rule Select the rule that describes when to place demand on inventory for inventoried items. This selection serves as an indicator to the scheduler and to PeopleSoft Inventory that items specified in a work order associated with

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this business unit will place demand on inventory based on your selection of one of these rules. Select one of the following:

- Commit at Reserve

  This rule commits work order rows at the same time that the reservation rule applies For example, if you select Commit at Reserve as the commit rule and Parts List as the reservation rule, then the item(s) are committed and reserved when the Parts List is created.

- *Parts List*

  This rule dictates that the parts on a parts list are automatically committed in PeopleSoft Inventory when the parts list is created and saved.

- *Pick Plan*

  This rule dictates that whenever you click the Pick Plan button in the work order, the items in the pick plan will be automatically committed in PeopleSoft Inventory.

Note. You can also run a Pick Plan from PeopleSoft Enterprise Inventory or from the Materials page of the Technician Workbench.

- *Work Order Status Change*

  Select this value to enable you to select a internal status for theInternal Status field. When the status in the work order matches the status defined here for the commit rule, the items on the work order are committed to PeopleSoft Inventory.

Note. This is a required field if you enter an Inventory business unit in the Inventory Unit field.

Internal Status

If you selected *Work Order Status Change*, select one of the internal work order statuses that triggers the commitment of items in PeopleSoft Inventory, which include:

- *Awaiting Schedule*
- *Scheduled*
- *Work in Progress*

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Integration Options, page 88.

Work Order Reservation Rule

Select one of these reservation rules to reserve inventory parts (items). Inventory parts (items) must be committed before they can be reserved.

Important! The system edits the commit and reservation rule combination to ensure that the items are committed at the same time or before they are reserved. The system also filters the values that apply to the work order based on the setup of these values in the work order business unit, shop, or shop/type.

- *Batch Reserve Only*

  When you run the Batch Reservation process the parts (items) in the rows are reserved.

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- *Parts List Creation*

  When you save the parts (items) in the work order task, reserve the parts (items).

- *Pick Plan Creation*

  When you run the Picking Plan for a work order task, reserve the parts (items).

- *Work Order Status Change*

  When you change the status of a work order task to Awaiting Schedule, Scheduled, or Work in Progress, the parts (items) are reserved.

Internal Status If you selected *Work Order Status Change*, select one of the internal work order statuses that triggers reservation of items in PeopleSoft Inventory for the work order, which include:

- *Awaiting Schedule*
- *Scheduled*
- *Work in Progress*

Priority Enter a number from 1- 999 for PeopleSoft Inventory to use to sort and prioritize demand. The number you enter here serves as a default value in the Inventory Schedules grid.

PeopleSoft Purchasing

PeopleSoft Maintenance Management requires the installation of PeopleSoft Purchasing to enable users to obtain materials, tools, labor, and other goods and services by creating either a requisition or a purchase order directly from the work order or work order workbench. You can also create a requisition or purchase order in PeopleSoft Purchasing and link it to a work order.

Create Requisition or PO (create requisition or purchase order) Select one of these values:

- the "blank" field or *None*

  Select this value to indicate that you do not intend to procure materials directly from a work order created with this business unit.

- *PO* (purchase order)

  Select this value to enable you to generate only purchase orders from a work order created with this business unit.

- *Req.* (requisition)

  Select this value to enable you to generate only requisitions from a work order created with this business unit.

Labor Rates

Effective Date and **Status** Enter or select the date from which you consider these labor rate values either *Active* or *Inactive*.

Labor Bill Rate Enter the hourly bill rate for labor to use to calculate the billable labor amount based on the labor hours entered at the work order task level.

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Labor Cost Rate Enter the hourly cost rate for labor to use to calculate the actual labor costs for any labor performed and tracked via a work order.

Note. You can override these rates for a specific shop at the shop level, as well as associate specific crafts and craft labor rates with a shop.

Entering Preventive Maintenance Parameters for a Work Order Business Unit

Access the PM Options page.

PM Options page

Calendar Select a business calendar to use in determining valid business days for preventive maintenance work orders that are generated for this business unit. Selecting this option enables you to avoid scheduling preventive maintenance work orders on holidays or weekends.

Priority Code Select *H* (High), *M* (Medium), or *L* (Low) to appear as the default priority in any preventive maintenance work order that the application automatically creates for this business unit. This is a required field.

Important! This default value appears for all work orders except for work orders that you create for a project for a Project Costing-managed project.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Setup and Processing of Preventive Maintenance Work Orders, page 283.

Work Order Type Select the work order type that you want to use as the default value in any preventive maintenance work orders that the application generates for this business unit. This is a required field.

Task Status Select the work order task status for a work order task that you want to appear as the default value for any preventive maintenance work orders created during Preventive Maintenance processing that are associated with this business unit.

You can select any user-defined work order task status except for those that you defined for the internal statuses of complete, closed, and canceled.

This is a required field.

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See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Work Order Statuses, page 144.

Last PM Schedule ID This identifies the last number used to create a preventive maintenance schedule and automatically increments each time a new preventive maintenance schedule is created.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Setup and Processing of Preventive Maintenance Work Orders, page 283.

Setting Up Resource Assignment Approval Options in PeopleSoft Maintenance Management

To set up resource assignment approval options use the Work Order Options (WM_BUS_UNIT_OPT) component.

This section provides an overview of labor resource assignment approval workflow and discusses how to define resource assignment approval options.

Understanding Labor Resource Assignment Approval Workflow

For a work order task, you have the option of approving the assignment of labor resources who are associated with a shop that is different from the shop associated with the work order. The employee data, regardless of the source, identifies the supervisor of each employee. You can also set up employee data and identify the supervisor of an employee using the Manage Employee Data component in PeopleSoft Maintenance Management. When you set up the Work Order Options component to indicate that assignment approval is required, this automatically activates the assignment approval workflow. Once this approval workflow is activated, then when you create a work order task and assign a labor resource who works for a shop other than the shop in the work order, the system sets the assignment to Pending Approval status and sends the assignment to the worklist of the supervisor of the resource for approval. The supervisor is identified in the resource's Employee Data. The supervisor can approve or reject the assignment. If the supervisor approves the assignment, the system sets the assignment approval status to Assigned. If the supervisor does not approve the assignment, the system sets the assignment approval status to Rejected. Only the supervisor of the resource can save an assignment with a status of Assigned.

In addition, you can set up email notifications to the manager of a resource and to the resource being assigned. You can select one or more assignment statuses that trigger an email notification to the manager of the resource and to the resource.

For example, Jim Dobson is identified in Jill Stanton's Employee Data as her supervisor and Jill is assigned to Shop A. Tyler Jones is identified as the manager of Jill Stanton. You set up the Work Order Options page to require assignment approval and you indicate that you want to notify Jill's manager, Tyler Jones, when Jill is Assigned to the task. You also indicate that you want to notify Jill when the assignment is either Pending Approval, Assigned, or Rejected.

When you create a work order with Shop B and assign Jill Stanton as the technician on a task, then the worklist for Jill's supervisor, Jim Dobson, is updated to indicate that the assignment of Jill Stanton is Pending Approval. Based on the notification setup, Jill also receives an email notifying her that the assignment is Pending Approval. When Jim Dobson approves the assignment, a email is sent to Jill notifying her that the assignment is Approved, and an email is sent to Jill's supervisor, Jim Dobson, indicating that the assignment is Approved.

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Sample Supervisor/Manager Notification

The following information is an example of the notification sent to the manager designated in the Options page:

Assignment # 0000000263 has been created for Ng, Edward

Work Order Business Unit: US001

Work Order ID: 0000000001

Requestor: Edward Ng

Assignment Description: Replace tires on dump-truck.

Required Start Date: 07–01–2005 Required End Date: 07–01–2005

Project: Truck Maint - QTR 3

Work Order Task Scheduler: Jon Renquist

Work Location: US001 – San Francisco

Assignment Detail:

Schedule Start Date: 07:01:2005 Time: 8 a.m., End Date: 07–01–2005 Time: 5 p.m. for 8 hours

Sample Resource Notification

The following information is an example of the notification sent to the resource designated in the Options page:

Your assignment # 0000000263 has been created for:

Work Order Business Unit: US001

Work Order ID: 0000000001

Requestor: Edward Ng

Assignment Description: Replace tires on dump-truck.

Required Start Date: 07–01–2005 Required End Date: 07–01–2005

Project: Truck Maint - QTR 3

Work Order Task Scheduler: Jon Renquist

Contact Name: George Jacobson

Telephone: 415 454–2315

Email ID: gjacobson@california.com

AM Business Unit: US001

Asset ID: TR114423

Asset Description: 1997 40 Ton Ford Dump Truck

Asset Location: US001 – San Francisco

Work Location: US001 – San Francisco

Assignment Detail:

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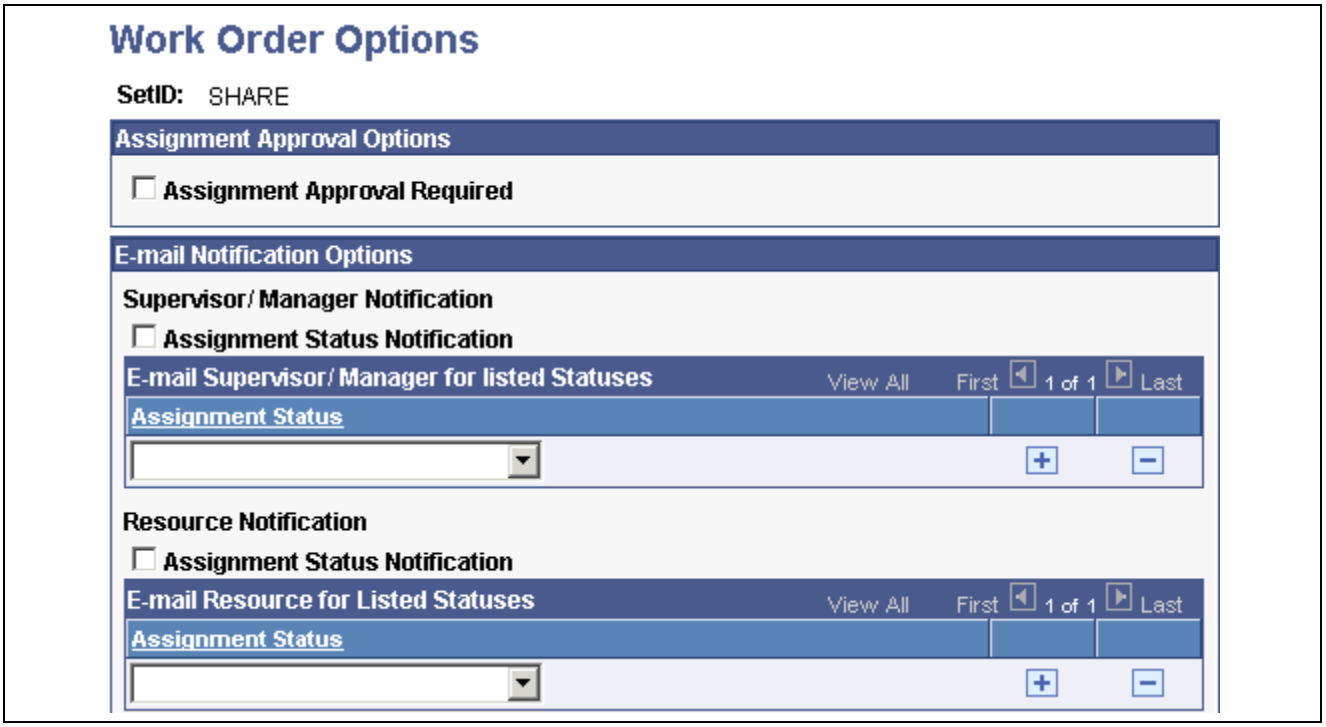
Schedule Start Date: 07:01:2005 Time: 8 a.m., End Date: 07–01–2005 Time: 5 p.m. for 8 hours

Page Used to Set Up Resource Assignment Approvals

Page Name	Object Name	Navigation	Usage
Work Order Options	WM_BUS_UNIT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Maintenance Management, Work Order Options.	Define email options for resource assignment approval.

Defining Resource Assignment Approval Options

Access the Work Order Options page.



Work Order Options page

These options are set up by setID, which means that they can apply to all work orders regardless of their business unit or other required fields.

Assignment Approval Options

Assignment Approval Required Select this check box to enable assignment approval workflow for cross-shop assignments.

Selecting this check box means that users other than the resource's supervisor cannot save an assignment with a status of *Assigned*.

E-mail Notification Options

You can enable email notifications to notify a resource's supervisor/manager and the resource about changes in the assignment status.

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Assignment Status Notification Select the check box below Supervisor/ Manager Notification or Resource Notification to enable the sending of an email notification to the supervisor/manager of the resource being assigned and to the resource based on a selected assignment status.

Assignment Status Add one or more assignment statuses. When the assignment status for a resource changes to one of the statuses listed below, the system sends an email notification about this change to the manager of the resource. The system also sends an email to the resource being assigned based on one or more of these selected statuses:

- *Assigned*
- *Cancelled*
- *Complete*
- *Pending Approval*
- *Rejected*

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Assigning Resources," Creating Assignments.

Setting Up PeopleSoft Maintenance Management Work Order Parameters

To set up:

- Work order types use the Work Order Type (WM_WO_TYPE) component.
- Service groups use the Service Group (WM_SRVC_GRP) component.
- Work order priorities use the Work Order Priority (WM_PRIORITY) component.
- Maintenance types use the Maintenance Type (WM_MAINT_TYPE) component.
- Downtime reasons use the Downtime Reason (WM_DWNTIME_RSN) component

This section provides an overview of work order types, service groups, priorities, maintenance types, and downtime reasons and discusses how to:

- Create work order types.
- Create work order service groups.
- Establish work order priority codes.
- Set up asset maintenance types.
- Define asset downtime reasons.

Understanding PeopleSoft Maintenance Management Work Order Parameters

Work order types and service groups are used to categorize work orders, work order data, and work order behavior. Maintenance types and downtime reasons are attributes describing the selected asset.

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Work Order Types

Work order types are user-defined and specify in general terms the kind of work performed within the work order. Work order type is an element in each of the default hierarchies defined in the work order business unit. It is used to identify some of the basic functionality of the work order, which includes:

- The distribution accounting template that the work order uses.
- The distribution template rules setup.
- The associate projects setup.
- The grace period for closing a work order and work order task.
- The use or nonuse of chargebacks in a work order.
- The default commitment rule for inventoried materials.
- The display of project-related fields in the work order.
- The work order workflow approval options.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Defaults and Default Hierarchies, page 83 and Chapter 8, "Setting Up Labor and Tools Resources," Defining Shop Information, page 203.

Service Groups

Service groups are used to group work orders by major categories such as Fleet, IT, and Facilities. A service group is required when you create a work order. While a work order business unit is not specifically associated with a service group, it may be used in conjunction with several service groups. A default service group may be set up in a work order business unit. Service groups help define certain work order behaviors, such as:

- Triggering the relevant data that displays in the work order at both the task level and the asset lookup level.
- Identifying the defaulting ChartField distribution templates in the work order for each of the resource types: labor, parts, materials, and tools.

  Note. You set up ChartField distributions to enable you to perform manual allocations to GL to generate accounting entries.

- Applying the ChartField distribution template rules to the work order.
- Enabling the Project ID default value in the work order based on the setup of the Associate Projects component.

Priorities

You set up priorities for work orders to identify each work order's level of urgency or importance to a scheduler or technician. Examples of priorities are high, medium, and low.

Note. Service request priorities are system-defined values (Critical, Urgent, Standard, and Low). Users cannot define them.

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Maintenance Types

Maintenance types are defined in PeopleSoft Asset Management. They identify the type of maintenance and maintenance procedures that should be followed for a particular asset. For example, you might establish a Tune Up maintenance code that specifies routine maintenance for an automobile. In PeopleSoft Maintenance Management, you must associate one or more maintenance types with an asset type and subtype in order to define a preventive maintenance loop. You can set up a maintenance type as a default value in the work order business unit, which displays in the Maintenance Type field on the Miscellaneous page of the work order. This field must be entered before you can close preventive maintenance work orders.

Downtime Reasons

You can enter the downtime for an asset and select a reason for the asset downtime for each work order task. When a work order is closed, the Work Order Close process updates the total of downtime hours in the asset maintenance history using the data that you entered on the work order. Work order close does not, however, update the start and end downtimes in PeopleSoft Asset Management.

Note. There is a link to enter downtime on the Actual Task Dates tab of the Technician Workbench.

Pages Used to Set Up Work Order Types, Service Groups, and Priorities

Page Name	Object Name	Navigation	Usage
Work Order Type	WM_WO_TYPE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Work Order Type	Defines the basic kinds of work that performed in a work order.
Work Order Service Group	WM_SRVC_GRP	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Service Group	Identifies specific behaviors in a work order.
Work Order Priority	WM_PRIORITY	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Work Order Priority	Indicates the urgency for completing a specific work order.
Associate Maintenance Type with Asset Subtype	WM_MAINT_TYPE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Maintenance Type	Defines the category of maintenance needed for a selected asset type and subtype.
Downtime Reason	WM_DWNTIME_RSN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Downtime Reason	Describes the reason that an asset is not available for use.

Creating Work Order Types

Access the Work Order Type page.

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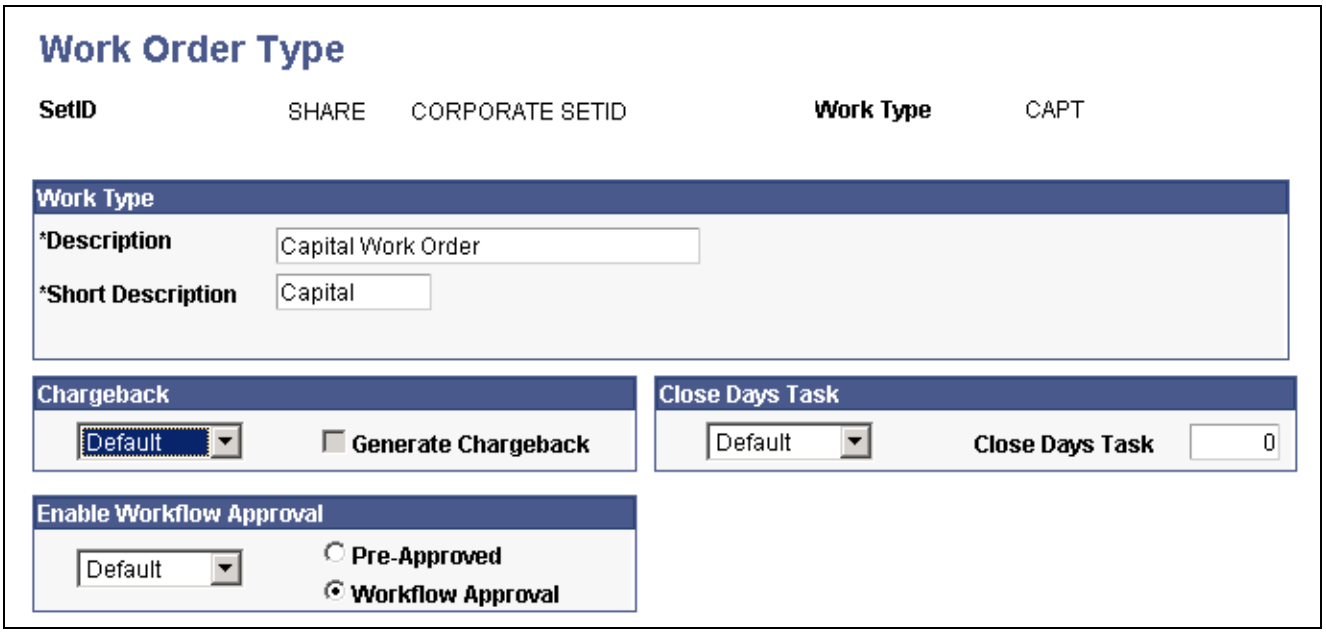

Work Order Type page

Work Type Enter and describe each type of work order that you use in your organization such as *Ad Hoc*, *Preventive*, *Capital*.

Chargeback Select one of these values:

- *Default*

  Selecting this value means that the system applies the value specified in the work order business unit to any work order that you create with a specific business unit.

- *Specify*

  Selecting this value enables you to select the *Generate Chargeback* check box, which means that you can generate chargebacks for any work orders that you create using this work order type.

Close Days Task Select one of these values:

- *Default*

  Selecting this value means that the value that you specify at the business unit level applies to any work order that you create with a specific business unit.

- *Specify*

  Selecting this value enables you to specify the number of days between the completion of a work order task and its closing. This value applies to every work order that you create using this work order type.

Enable Workflow Approval Select one of these values:

- *Default*

  Selecting this value means that the system bypasses the work order type based on the default hierarchy that you selected in the business unit, and looks at the values at the shop and work order business unit levels.

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- *Specify*

  Selecting this value enables you to click either the Pre-Approved option, which means that work orders that you create using this work order type are always pre-approved. Or click the Workflow Approval option if you want to require the approval of work orders that you create using this work order type based on the established workflow approval process. This specification is used depending on the default hierarchy selected in the work order business unit.

See Chapter 10, "Configuring Work Order Approval Workflow," Understanding the Work Order Approval Workflow Architecture, page 251.

Creating Work Order Service Groups

Access the Work Order Service Group page.

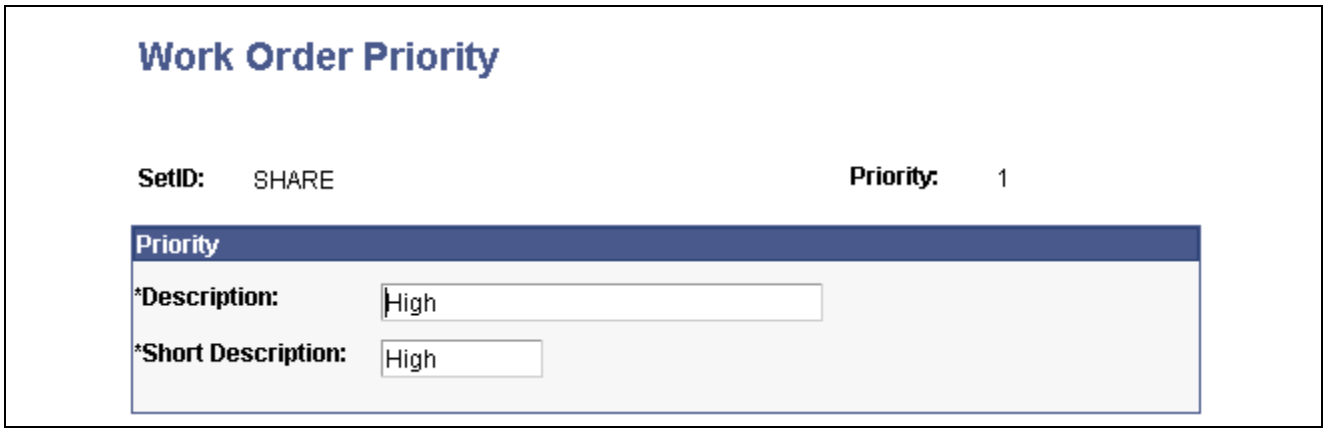
Work Order Service Group page

Service Group Enter and describe each type of service group, such as IT and Facilities, to use for defining specific work order behaviors.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Work Order Business Unit Setup, page 75.

Establishing Work Order Priority Codes

Access the Work Order Priority page.



Work Order Priority page

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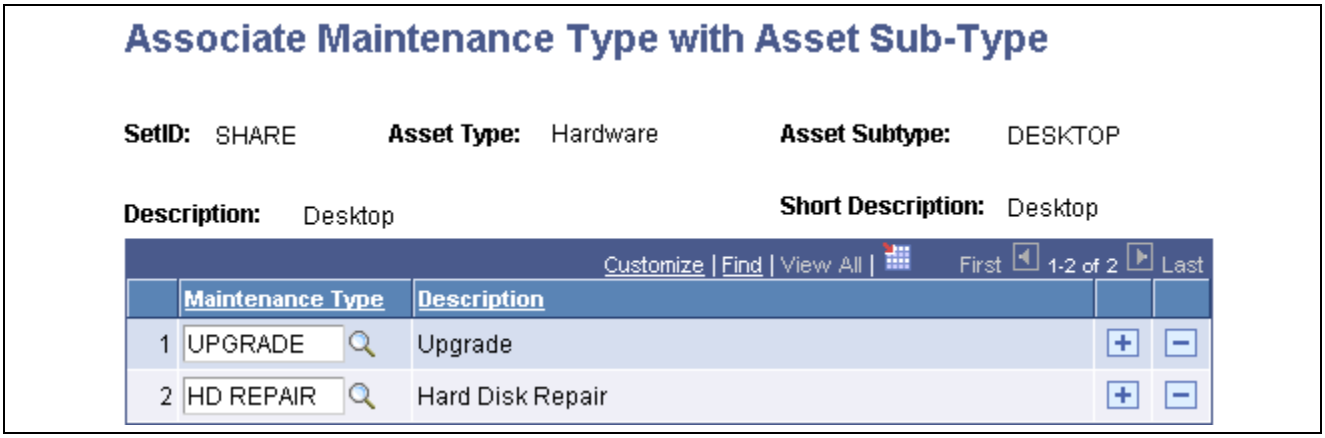
Priority Code Enter a level of priority such as High, Medium or Low or whatever values are meaningful to your organization. When you create a work order, you select its level of priority in relation to other work orders.

Setting Up Asset Maintenance Types

Access the Maintenance Type page.



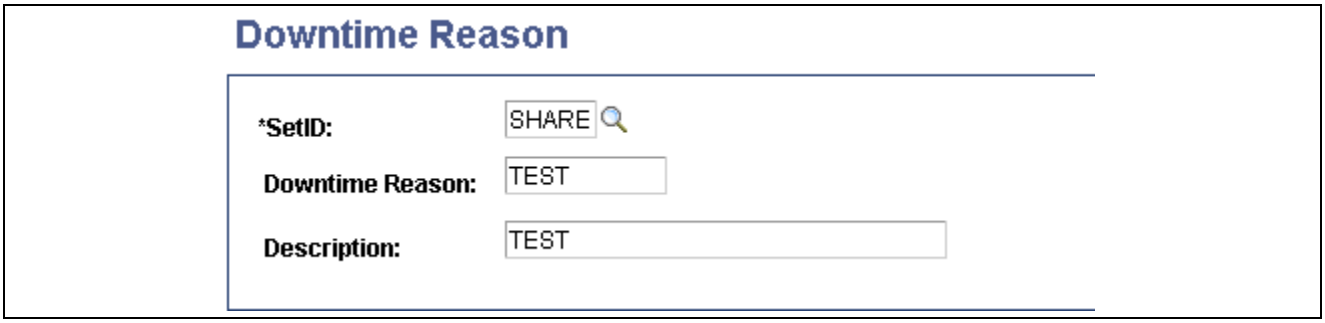
Associated Maintenance Type with Asset Subtype page

SetID and **Asset Type** and **Asset Subtype** and **Description** and **Short Description** Access the Maintenance Type component, enter the setID and select the Asset Type and Subtype.

Maintenance Type Add one or more rows of maintenance types to associate with the selected Asset Type and Asset Subtype.

Defining Asset Downtime Reasons

Access the Downtime Reason page.



Downtime Reason page

Downtime Reason Enter the abbreviated reason that an asset is unavailable for use.

Description Provide a longer description of the reason for the asset downtime.

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Setting Up Rules and Data Related to PeopleSoft Project Costing

To set up:

- Associate projects use the Associate Projects (WM_PC_DFLT_PRJ) component.
- PeopleSoft Project Costing ChartField mappings use the Default PC ChartFields (WM_PC_DFLT_CFS) component.
- Capitalization rules use the Capitalization Rules (WM_PC_CAP_INTGRTN) component.

This section provides an overview of PeopleSoft Project Costing related rules and data in PeopleSoft Maintenance Management and discusses how to:

- Associate projects with a work order business unit, work order type, and service group.
- Set up default PeopleSoft Project Costing ChartFields.
- Define work order capitalization limits.
- Associate capitalization filters with an asset.

Understanding Project Defaulting and Capitalization Rules in PeopleSoft Maintenance Management

This section discusses:

- Project defaulting in work orders.
- Capitalization rules for work order-managed projects.

Project Defaulting in Work Orders

A project ID displays in the work order header and an activity ID displays in the work order task for work orders that are created from PeopleSoft Project Costing. To display this information in the work order and work order task, you must map the project IDs with the Project Costing business unit that is specified in Integrations page of the work order business unit, as well as map these values to a work order business unit, work order type, and service group.

Default Project Costing ChartField Template

PeopleSoft Project Costing has its own set of ChartFields that are used to sort costs for Projects. These ChartFields are different from ChartFields used for accounting entries in PeopleSoft General Ledger and do not impact the flow of costs into PeopleSoft General Ledger. You can edit everything except the Project Costing business unit, project ID, and activity ID.

This template is used to load defaulting Project ChartField values to each work order distribution row and applies to both work orders associated with work order managed projects and Project Costing managed projects. Users can override these ChartField values for each resource row, if desired. These ChartFields are carried over to PeopleSoft Purchasing, PeopleSoft Payables, the time entry infrastructure shared with PeopleSoft Payables, and PeopleSoft Inventory along with the accounting ChartFields. Tools integrates directly with PeopleSoft Project Costing and uses this template. You can map a specific project to an integration module, resource type, source type, category and subcategory for a work order business unit, work order type and service group. You can enter wildcards for the work order type and service group values.

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Capitalization Limits for Work Order-Managed Projects

You set up the capitalization limits to establish a minimum amount that it costs to repair or maintain an asset in a work order before PeopleSoft Project Costing capitalizes the costs. For example, if facility repairs have a capitalization limit of $500, this means that you must spend a minimum of $500 on a facility repair work order task before the costs of that repair are capitalized in PeopleSoft Project Costing and sent to PeopleSoft Asset Management. You must specify the Asset Business Unit and the asset currency code for which the capitalization of costs is calculated. This feature only applies to work orders associated with work order-managed projects and not work orders associated with Project Costing-managed projects.

The following table is an example of capitalization limit setup:

Asset type	Asset Subtype	Asset Business Unit	Currency	Capitalization Minimum
Fleet	180 HP Engine	US001	USD	10,000
Fleet	180HP Engine	FRA01	FRF	20,000
Fleet	200HP Engine	US001	USD	15,000
Fleet	200HP Engine	CAN01	CAD	25,000

Capitalization Filters for Work Order-Managed Projects

PeopleSoft Project Costing uses capitalization filters to capitalize costs for work orders that are associated with Project Costing-managed projects. However, to enable PeopleSoft Project Costing to capitalize costs used in work orders associated with work order-managed projects, you must select an adjustment filter and a retirement filter, which are defined in Express Asset Criteria in PeopleSoft Project Costing, for an asset type and subtype in the WO Capitalization page in PeopleSoft Maintenance Management. You associate these filters with the Project Costing business unit that is specified in the work order business unit. The adjustment filter is user-defined, and you can set one up in PeopleSoft Project Costing, for example, so that PeopleSoft Project Costing only capitalizes the material costs to the asset. The retirement filter is used for PeopleSoft Project Costing to calculate the cost of removal for an asset.

Note. You must run the Cost Summarization process after the PeopleSoft Project Costing runs the Capitalization process to view the Capitalized Amount on the Capitalization inquiry in PeopleSoft Maintenance Management.

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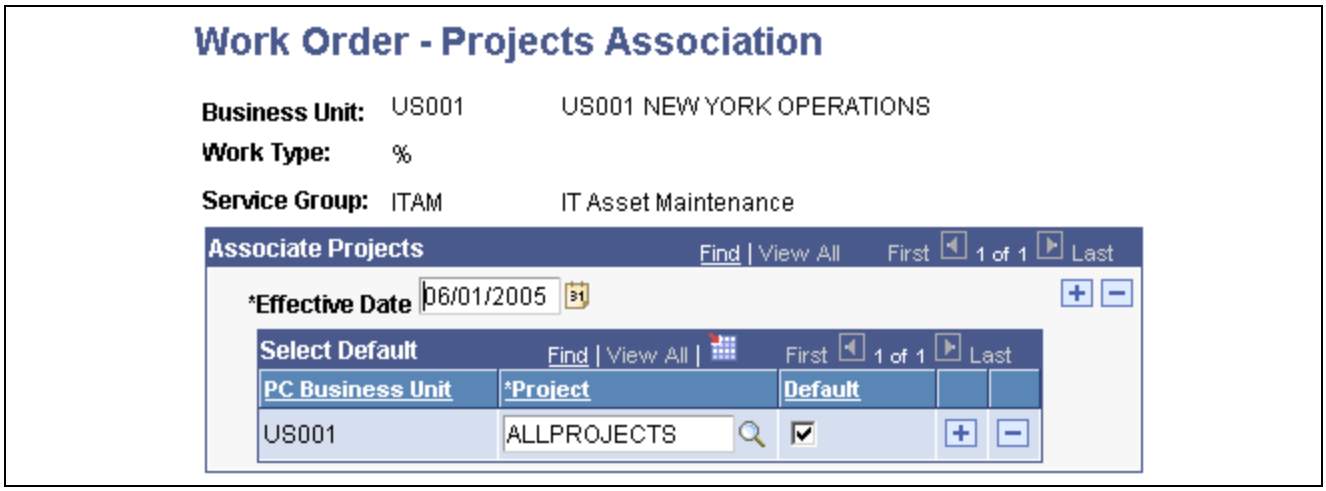
Pages Used to Set Up Rules and Data Related to Project Defaulting

Page Name	Object Name	Navigation	Usage
Work Order - Projects Association	WM_PC_DFLT_PRJ	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Accounting Defaults, Associate Projects	Maps project IDs and a Project Costing business unit to a work order business unit, work order type, and service group to establish default values in the work order.
Work Order Project ChartField Mapping	WM_PC_DFLT_CFS	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Accounting Defaults, Default PC ChartFields	Maps Project Costing ChartFields to other applications integrated with Maintenance Management and Resource Types associated with a work order business unit, work order type, and service group.
WO Capitalization Limit	WM_PC_CAP_INTGRTN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Accounting Defaults, Capitalization Rules	Sets the minimum amount of costs that must be exceeded to trigger capitalization of the costs to an asset.
WO Capitalization Filter	WM_PC_CAP_FLTR	Select the Capitalization Filter tab.	Associates adjustment filter and a retirement filter with a PC business unit and applies them to an asset type and subtype.

Associating Projects with a Work Order Business Unit, Work Order Type, and Service Group

Access the Work Order - Projects Association page.



Work Order - Projects Association page

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Business Unit Enter the work order business unit that you want to associate with these projects.

Work Order Type and **Service Group** Enter a specific work order type and service group to associate with these projects or you can use a wildcard (%) for all work order types. The system weights these fields with the wildcard taking precedence over a specified value.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Defaults and Default Hierarchies, page 83.

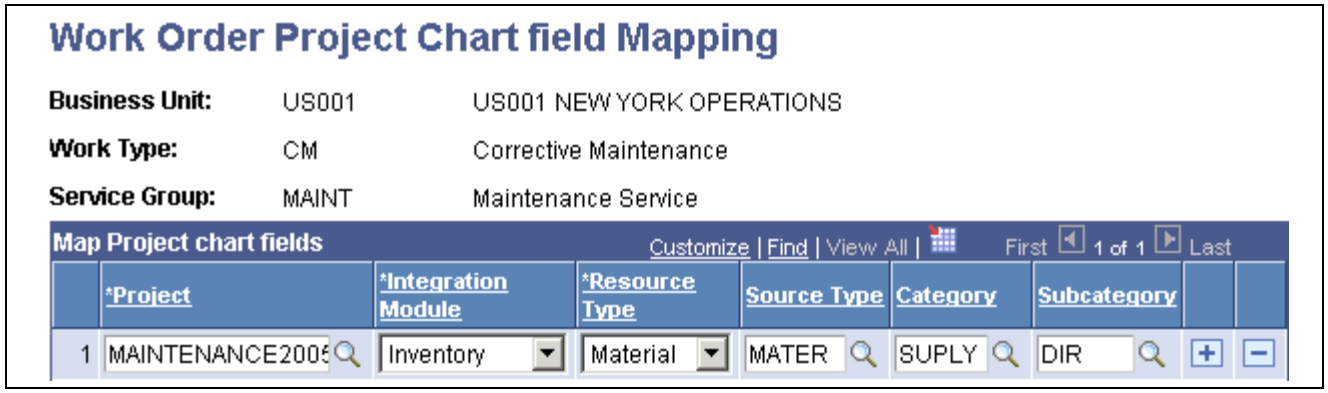
Effective Date Enter the date that this setup became effective. This date is checked against the start date in the work order to assure that you can apply these rules to the work order.

PC Business Unit (Project Costing business unit) This value defaults from the value entered in the work order business unit's Integrations page.

Project Select the option next to the project ID that you want to be the default value in the work order.

Setting Up Default Project Costing ChartFields

Access the Work Order Project ChartField Mapping page.



Work Order Project ChartField Mapping page

Project Select the project with which to associate these ChartFields.

Integration Module Select either:

- *Project Costing.*
- *Inventory.*
- *PO/AP.*
- *Expenses*.

Resource Type Select:

- *Labor* for PeopleSoft Payables and PO/AP.
- *Tools* for PeopleSoft Project Costing.
- *Material* for PO/AP and PeopleSoft Inventory.

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Source Type Select the PeopleSoft Project Costing source type ChartField value.

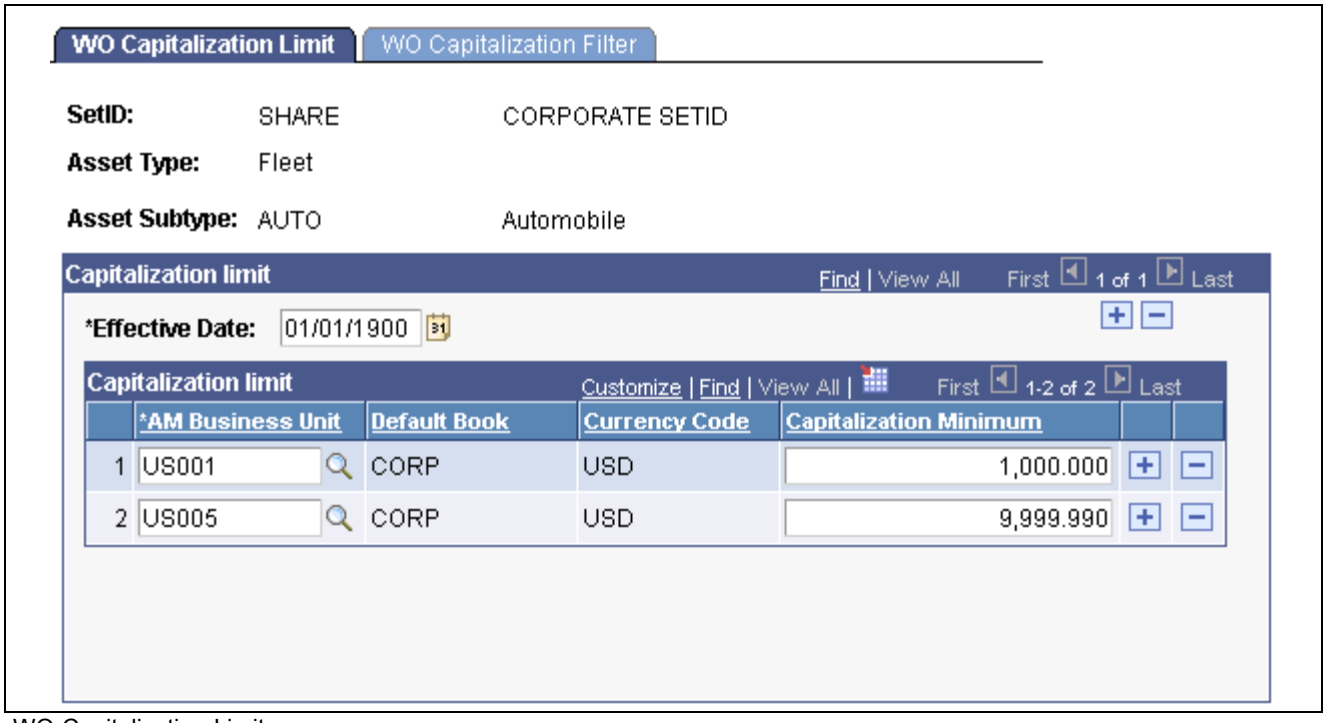
See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up PeopleSoft Project Costing Control Data," Source Types.

Category and **Subcategory** Select the category and subcategory to associate with this source type.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up PeopleSoft Project Costing Control Data," Categories and Subcategories.

Defining Work Order Capitalization Limits

Access the WO Capitalization Limit page.



WO Capitalization Limit page

Effective Date Enter the date that the information in this page becomes effective. The system checks this date against the work order start date.

AM Business Unit (Asset Management business unit) Select the Asset Management business unit to which this cost capitalization limit amount applies. A default book and currency code that are set up set up for this business unit in PeopleSoft Asset Management display.

Default Book The default book associated with the Asset Management business unit displays for reference purposes.

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, "Establishing PeopleSoft Asset Management Business Units," Defining Business Unit/Book Feature Options.

Currency Code Displays the currency code based on the currency code specified in the default book of the Asset Management business unit, which PeopleSoft Project Costing uses when capitalizing the asset This can be a different code from the code set up in the work order business unit.

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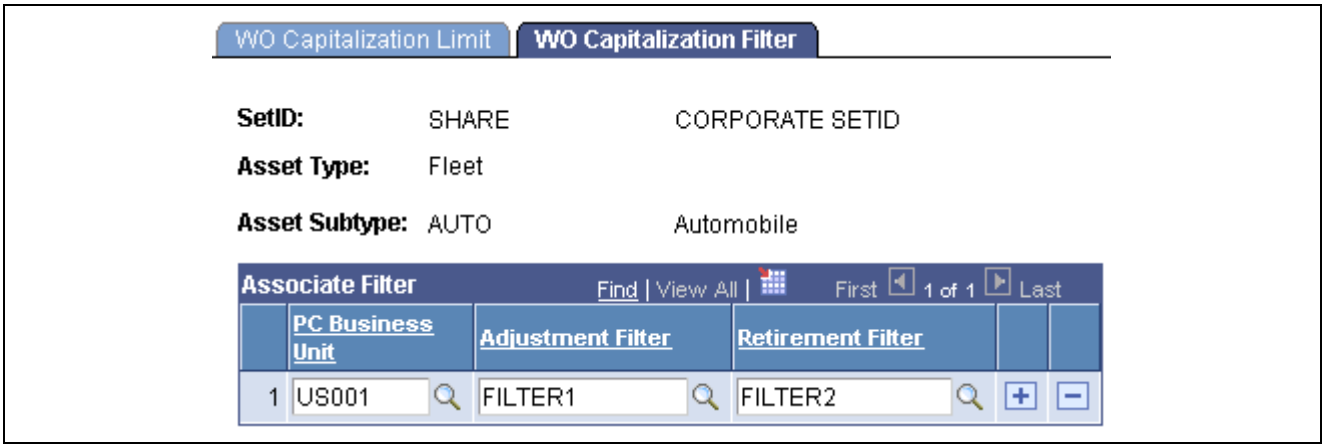
Capitalization Minimum Enter the minimum cost of repairing this asset in a work order task before the task become eligible for Capitalization. PeopleSoft Project Costing capitalizes the costs.

Associating Capitalization Filters with an Asset

Access the WO Capitalization Filter page.



WO Capitalization Filter page

PC Business Unit (Project Costing business unit) Select the PC business unit to which you want to associate specific PeopleSoft Project Costing filters that the system uses to determine which costs to capitalize or count as costs of removal for a work order.

Adjustment Filter Select a user-defined filter. This filter determines which of the asset repair or maintenance costs to capitalize.

Note. Filters are defined in the Express Asset Filter component in PeopleSoft Project Costing setup.

Retirement Filter This filter identifies the cost of removal of an asset that is being disposed using a work order task. The system uses this filter for asset gain and loss calculations.

Setting Up ChartField Distributions for PeopleSoft Maintenance Management

To set up PeopleSoft Maintenance Management ChartField distributions, use the Distribution Template (WM_DIST_TMPL) component.

This section provides an overview of ChartField distribution setup and discusses how to:

- Set up a distribution template.
- Set up distribution template rules.

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Understanding ChartField Distribution Setup in PeopleSoft Maintenance Management

PeopleSoft delivers financial identifiers referred to as ChartFields to group PeopleSoft Maintenance Management activities by their accounting treatments. Organizations must define ChartFields to account for and classify work order-related costs. Although work order ChartField distribution default values are set up prior to the creation of a work order, users can override them, if necessary, in the work order before the system passes them to the feeder systems, such as PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Payables with other work order data. Once the system passes these ChartFields to the feeder systems, it inserts them into the transaction documents of the feeder system, and they are then sent to PeopleSoft Project Costing for financial cost tracking, cost capitalization, and cost recovery, including markup and discount, if appropriate. The need to pass along ChartField values to distribution lines in different feeder systems requires slightly different data element requirements for each specific product. For example, PeopleSoft Purchasing and Accounts Payable require the same active ChartFields, while PeopleSoft Inventory requires a transaction group and distribution type codes along with the active ChartFields.

Work in process (WIP) accounting is handled in PeopleSoft Project Costing only for work orders associated with PeopleSoft Project Costing managed projects and not for work orders associated with work order managed projects.

PeopleSoft Inventory only supports one ChartField distribution row for materials. The cost element in PeopleSoft Maintenance Management is not part of this distribution row. For PeopleSoft Inventory stock items, there is always an Inventory distribution row even if the requested item is fully procured through PeopleSoft Purchasing. In this situation, distribution rows exist for both Inventory and PeopleSoft Purchasing in the Materials and Procurement distribution records, because all stock items eventually must have an issue transaction associated with them in order to decrease the PeopleSoft Inventory balance.

The accounting rules in PeopleSoft Project Costing handle the chargeback ChartField distribution setup for a work order business unit. To mark up or discount costs, the system books the costs to the work order organization then charges them to the recipient at the close of a WO task. Alternatively, you can override default ChartField values and charge the as-incurred costs (without discount or markup) directly to other organizations without having to process them via the accounting rules.

If PeopleSoft Maintenance Management integrates with PeopleSoft Payables for the purpose of labor time entry, the system only allows one distribution row because the labor distribution data in PeopleSoft Payables is embedded in the time entry structure. The distribution line is generated once you assign a resource to the work order task.

Important! You must set up the integrated modules that you know that you will be using to default distributions properly to the work order. If you do not use tools for a work order, then you do not need to define a value for PeopleSoft Project Costing. You also do not need to all the resource types in PeopleSoft Purchasing if you do not intend to associate or create purchase orders and vouchers with work orders.

Users create a distribution template in PeopleSoft Maintenance Management for a work order business unit, which contains the ChartField distributions and default values for integration with PeopleSoft Inventory, PeopleSoft Purchasing/PeopleSoft Payables, PeopleSoft Payables, and PeopleSoft Project Costing (for tools) using the Distribution Template component. Tool transactions are sent directly to PeopleSoft Project Costing based on the ChartField combinations that you determine at the task row level.

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ChartField Distribution Template Rules

After setting up a distribution template, users can define distribution template rules based on the work order business unit, service group, work order type, asset type, asset subtype, asset business unit, asset ID, and asset location combinations. Users can use wildcards (%) to apply the same template across more than one work order type, service group, and asset location. The accounting default order is set up in the work order business unit, where you can sequence the service group, work order type, asset type, asset subtype, asset location, asset ID, and asset business unit to determine the weighting of each option listed. Defaulting can also occur at the shop level. Users can specify default ChartFields at the shop level that override ChartField defaults brought over from the distribution template. Only the fields that are populated at the shop level override the default values specified in the template. The system does not change any other default template field values.

Users can override the ChartField defaults up to the point that an inventory issue or requisition/purchase order is created and labor and tools usage actuals are entered. In other words, the ChartFields are established from the PeopleSoft Maintenance Management side from the moment that a transaction containing the distributions is generated in any of the feeder systems. However, the feeder systems can override these ChartField values. If the values are overridden in the feeder system, these changes will be sent back to the work order.

Chartfield template selection is based on the work order business unit, shop, work order type, service group, asset type, asset subtype, asset business unit, asset id and asset location. The first three are identified on the work order header, the remaining four are identified on the different work order tasks. Generally the system triggers default ChartField distributions at the point of scheduling. If requirements or assignments are not required, then the default distribution occurs when the actuals are recorded.

If assignments are not used, the ChartField distribution line defaulting occurs when you add actual hours or units of measure for labor and tools usage. Entry or update of labor hours in the Technician Workbench populates actuals on the work order. PeopleSoft Maintenance Management looks up the correct default ChartField templates and populates the time record for data integration into PeopleSoft Project Costing. However, if only actuals are recorded, the default values of the distribution lines are directed into the feeder system transaction.

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Work Order Business Unit Defaults and Default Hierarchies, page 83.

ChartField Combination Editing

Because other PeopleSoft products use and interface with ChartFields, PeopleSoft Maintenance Management supports combination editing based on transactions that originate from the work order. The groups that are attached to the GL business unit and the ledger group associated with the work order business unit are the combination groups that are used for PeopleSoft Maintenance Management. You can turn off combination editing at the work order business unit level. As long as you turn on combination editing at the work order business unit level, the system validates each row in the work order.

Important! Combination editing is not performed on the ChartField distributions for labor resources, because these ChartFields do not contain an account or alternate account.

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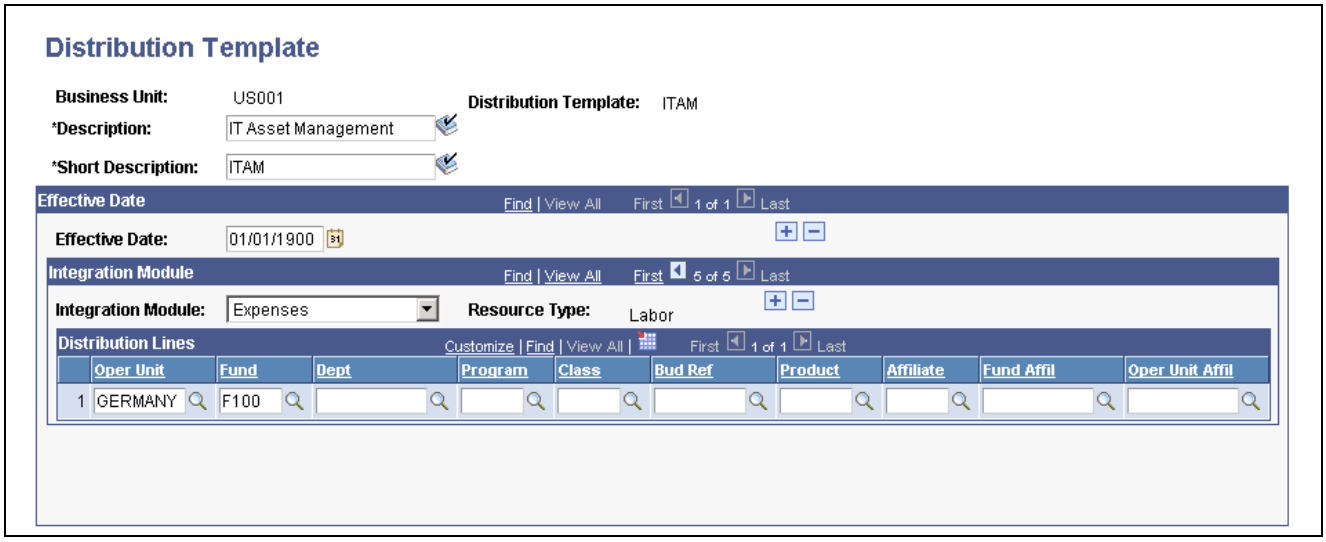
Pages Used to Set Up ChartField Distributions for PeopleSoft Maintenance Management

Page Name	Object Name	Navigation	Usage
Distribution Template	WM_DIST_TMPL	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Accounting Defaults, Distribution Template	Define default ChartField values for Inventory, PeopleSoft Purchasing/PeopleSoft Payables, Expenses (labor only), and PeopleSoft Project Costing (tools) by work order business unit for actual transactions that are initiated via a work order.
Distribution Templates Defaulting Rules	WM_DIST_TMPL_BY_BU	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Accounting Defaults, Distribution Template Rules	Enables users to associate distribution templates with a combination of criteria, such as service group, work order type, asset location, asset type, and more.

Setting Up a Distribution Template

Access the Distribution Template page.



Distribution Template page

Integration Module

Set up a template for each product (PeopleSoft Inventory, Payables/PeopleSoft Purchasing, and PeopleSoft Payables), as well as a template for tools using the PeopleSoft Project Costing Integration Module.

Integration Module Select either:

- *Inventory.*
- *Payables/ Purchasing.*

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- *Expenses.*
- *Project Costing,* which is used for tools.

Resource Type Select either *Labor*, *Material*, or *Tools* for the resource type.

Note. You can only select a Resource Type field when the Integration Module selected is *Payables/Purchasing.* For all other integration modules, this field is read-only.

Distribute By Select to distribute to the distribution rows by *Amount* or *Quantity*.

Note. This field only displays if the integration module is Purchasing/Payables.

- Typically, you enter a purchase order or requisition for labor by *Amount* and for materials by *Quantity*.
- You enter inventory materials that are being purchased by *Quantity*.
- You enter noninventory materials that are being purchased by *Quantity* or *Amount*.

Distribution Type Select an Inventory distribution type to associate with this Inventory transaction group.

Note. This field only displays if the integration module is PeopleSoft Inventory and is optional.

Distribution Lines

Configure the distribution lines for each integration module based on these rules:

- For PeopleSoft Inventory:
  - Users can configure only one distribution line.
  - The PeopleSoft Inventory transaction group associated with the ChartField distribution is not shown on the page because PeopleSoft Enterprise Inventory uses transaction group 231 exclusively for Maintenance Management. This is the default value for all PeopleSoft Inventory transactions related to PeopleSoft Maintenance Management.
  - Users cannot blank out the default fields that were set up in the PeopleSoft Inventory Accounting Rules Template.
- For Payables/Purchasing:

  Users can enter multiple distribution lines and specify the percentage of costs or quantity to allocate to each row. Your choice of *Quantity* or *Amount* determines the default values that appear in the PeopleSoft Purchasing schedule row of the work order task. You can modify these values prior to staging the purchase order or requisition schedule row.

Setting Up Distribution Template Rules

Access the Distribution Templates Defaulting Rules page.

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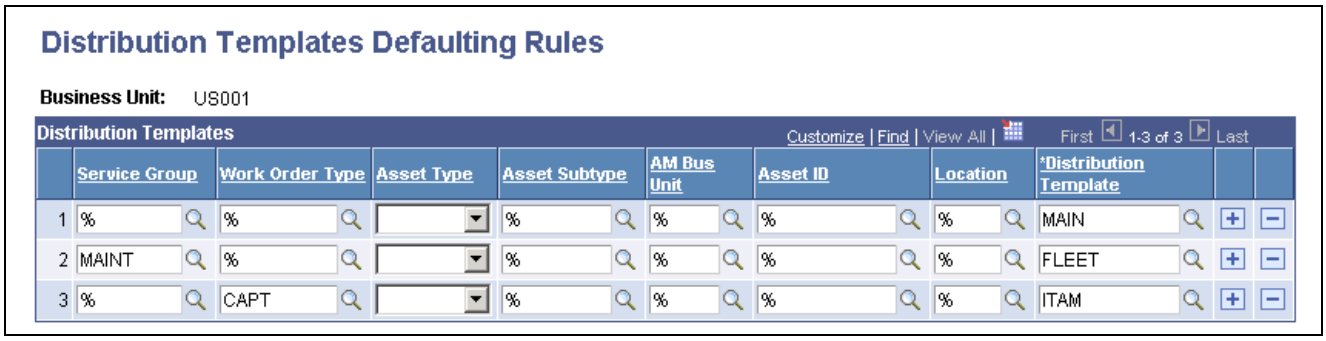

Distribution Templates Defaulting Rules page

You can add multiple rows containing different values.

Business Unit Select a work order business unit for which you want to define these rules.

Note. The work order business unit that you select contains the accounting default order that applies to these rules.

Service Group Select a service group value or enter a % (wildcard) to represent all service group values.

Work Order Types Select a work order type value or enter a % (wildcard) to represent all work order type values.

Asset Type Select an asset type value or leave it blank to represent all asset type values.

Asset Subtype Select an asset subtype value or enter a % (wildcard) to represent all asset subtype values.

AM Bus Unit (Asset Management business unit) Select an AM business unit value or enter a % (wildcard) to represent all AM business unit values.

Asset ID Select an asset ID value or enter a % (wildcard) to represent all asset ID values.

Location Select an asset location value or enter a % (wildcard) to represent all asset location values.

Distribution Template Select the distribution template that you want to associate with the previously selected values.

Note. When you enter multiple rows of values, the system weights each value. The row with the highest value determines the default ChartField distribution template that displays in the work order. For a given work order, only the values in the templates that match the values in the work order or have a wildcard in the field are selected as the default ChartFields for the templates in the work order.

For example, if a work order is created with a work order type of CAPT, and there are three defaulting distribution rules that contain respectively: (1) WO Type = CAPT; (2) WO Type = CM; (3) WO Type = %, then the only default rules that will apply to the distribution templates in the work order are (1) and (3).

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CHAPTER 6

Setting Up Problem Cause Resolution Data and Problem Trees

This chapter presents an overview of problem, cause, and resolution (PCR) setup and tracking in Oracle's PeopleSoft Enterprise Maintenance Management and discusses how to:

- Set up PCR data.
- Create a problem tree for use in service requests.

Understanding PCR Setup and Tracking

PCR tracking enables PeopleSoft Maintenance Management users to categorize their work order transactions using predefined problem, cause, and resolution codes. These codes are used to record:

- The problem or the nature of the maintenance or repair issue.
- The cause or underlying reason for a specific problem.
- The resolution or solution to the problem as reflected in the work task detail and overall job content of the work order.

You can link PCR codes in a hierarchy going from problem to cause to resolution and organize them under a user-defined problem group that describes the overall nature of the problem, such as *mechanical*, *electrical*, or *hardware*. After you have categorized work order tasks with PCR codes over a period of time, you can subsequently analyze these PCR code combinations to determine if there are repeatable patterns of occurrences. This information enables you to identify equipment prone to failure, as well as problems that occur frequently. Based on the frequency of the problem, you can decide if you want to set up reusable work order job templates, which predefine the resources needed to solve a problem.

The following table displays examples of user-defined problem group setups:

Problem Group	Problems	Causes	Resolutions
AUTOMOTIVE	Brakes Squeal Problem Code = BRAKESQUEAL	Brakeline - Bad, Contamination Cause Code = BRAKELINE)	Flush and fill brake fluid. Resolution Code = FF_BRAKEFLUID
NA	Oil Leak Problem Code = OILLEAK	Filter - Bad, Loose, Faulty, Worn Cause Code = FILTER	Replace/ Repair Filter Resolution Code = RR_FILTER

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Problem Group	Problems	Causes	Resolutions
NA	NA	Oil Pan - Bad or Worn Cause Code = OILPAN	Replace/ Repair Oil Pan Resolution Code = RR_OILPAN
NA	Engine Sluggish Problem Code = ENGSLUG	Dirty Oil Cause Code = DIRTYOIL	Drain and Replace Engine Oil Resolution Code = OILCHANGE
NA	Overheats – Runs hot. Problem Code = OVERHEAT	Bearings - Bad, Missing, or Worn. Cause Code = BEARINGS	Replace and Repack Bearings Resolution Code = RR_BEARINGS
NA	NA	Coolant - Loss, Contamination Cause Code = Coolant	Flush and Fill Coolant Resolution Code = FF_COOLANT
NA	NA	Filter - Bad, Loose, Faulty, Worn Cause Code = FILTER	Replace/ Repair Filter Resolution Code = RR_FILTER
NA	NA	Hose - Bad, Loose, Warn, Connection Cause Code = HOSE	Replace/ Repair Hose Resolution Code = RR_HOSE
NA	NA	Thermostat - Bad, Faulty, Calibration Cause Code = THERMOSTAT	Replace/ Repair Thermostat Resolution Code = RR_THERMO
NA	Tire Wear and Tear Problem Code = TIREWEAR	Tire - Usage Cause Code = TIREUSE	Rotate Tires Resolution Code = TIREROTATE
NA	NA	NA	Replace Tires Resolution Code = TIREREPLACE
MECHANICAL	Runs Constantly/Won't Shut Off Problem Code = CONSTANTRUN	Thermostat - Bad, Faulty, Calibration Cause Code = THERMOSTAT	Replace/ Repair Thermostat Resolution Code = RR_THERMO

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Problem Group	Problems	Causes	Resolutions
NA	Won't Start Problem Code = NOSTART	Thermostat - Bad, Faulty, Calibration Cause Code = THERMOSTAT	Replace/ Repair Thermostat Resolution Code = RR_THERMO
NA	Overheats – Runs Hot Problem Code = OVERHEAT	Bearings - Bad, Missing, or Worn. Cause Code = BEARINGS	Replace and Repack Bearings Resolutions Code = RR_BEARINGS

Based on the some of the items in the Problem Group setup above, you can create these work order task and work order job templates:

Resolution Code	Work Order Task Template	Work Order Job Template	Work Order Job Template Job Steps (List of Task Templates)
Resolution Code = FF_COOLANT Flush and Fill Coolant	Task Template ID = FL_AUTO_FF_COOLANT Fleet - Auto: Flush/Fill Coolant	NA	NA
Resolution Code = OILCHANGE Drain and Replace Engine Oil	Task Template ID = FF_AUTO_OILCHG Fleet - Auto: Oil Change	NA	NA
Rotate Tires Resolution Code = TIREROTATE	Task Template ID = FL_AUTO_TIREROTATE Fleet - Auto: Rotate Tires	NA	NA
NA	NA	FL_AUTO_3KSERV Fleet - Auto: 3,000 Mile Service	Step 1: Task Template ID = FL_AUTO_FF_COOLANT Fleet - Auto: Flush/Fill Coolant Step 2: Task Template ID = FF_AUTO_OILCHG Fleet - Auto: Oil Change Step 3: Task Template ID = FL_AUTO_TIREROTATE Fleet - Auto: Rotate Tires

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The implementation of PCR tracking includes:

- Setting up PCR codes.
- Setting up one or more problem groups.
- Optionally associating a resolution code with a work order task and job template to facilitate template lookup.

A problem group consists of three nested scroll levels and is used to establish the logical relationships or links between problems, causes, and resolutions in a series of one-to-many associations. This means that each higher level PCR code can in turn be linked to one or many lower level codes. Specification of a complete chain of problem to cause to resolution codes is optional. If you choose to create a problem group chain:

- You can associate problem codes with a problem group.
- You can specify a lower level code only if you previously entered a corresponding higher level parent code.

  You must enter these values consecutively with no gaps in between them. For example, a cause code must always have a parent problem code, and a resolution code must have a parent cause code.
- You can optionally link a problem code that you specified for a problem group to one or more individual cause codes.
- You can optionally link each cause code that you specified for a problem group to one or more individual resolution codes.
- You can link a problem group definition with one or more asset classification combinations.

  When users identify a target asset for a task line on a work order, the system will use the defined type, subtype, manufacturer, and model information of the asset to determine which problem group or groups and subsequent problem, cause, and resolution data should be made available in the prompt lists for these fields.

  If a problem group definition is not linked to at least one asset classification combination, it is considered a *standalone* definition. This occurs when you create a work order or a work order task that does not reference an asset as the object of the work being performed. For example, you can create preventive maintenance work orders based on a location, such as a shop, where the work order task is to take the inventory of a shop on a monthly basis. The problem group might be identified as *Other* to include miscellaneous problems.

Note. Problem trees are not required for PeopleSoft Maintenance Management unless your organization uses service requests.

PCR Tracking for Work Orders

Users can enter problem, cause, and resolution codes in a work order up to the point that the work order is closed, enabling them to track and analyze similar problems. For example, a planner or clerk might enter a problem group and problem when the work order is created. Later a technician may add the cause and recommend a resolution in the technician's workbench. Users may also use this functionality to search for an appropriate work order task template to resolve a particular maintenance or repair problem. They may optionally link problem group definitions with various asset classification combinations in order to facilitate their reuse or assignment when entering work orders.

Users may associate work order task template and job template definitions with a specific resolution code to streamline the search for templates that are applicable to a particular problem, cause, and resolution chain. When you want to select either a work order task or work order job template to associate with a work order or work order task, you can search for the template based on the problem group and problem, cause, and resolution codes associated with a template. This work order entry lookup capability is only possible if the resolution code referenced on a particular template definition is linked under a problem group definition as part of a complete problem, cause, and resolution chain.

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You can select a problem group, and problem, cause, and resolution codes for work order tasks. It is not necessary to select all four values. However, the system does not permit gaps in the chain of codes. Prompt tables for the various codes ensure that specification of a lower-level code in the chain, such as resolution, is only possible if users enter all higher-level codes (problem group, problem, and cause).

Setting Up PCR Data

To set up PCR data use the:

- Define Problem (WM_PROBLEM_DEFN) component.
- Define Cause (WM_CAUSE_DEFN) component.
- Define Resolution (WM_RESOLUTION_DEFN) component.
- Define Problem Group (WM_PCR) component.

This section discusses how to:

- Set up a problem code.
- Set up a cause code.
- Set up a resolution code.
- Define a problem group.
- Set up asset classification parameters for a problem group.

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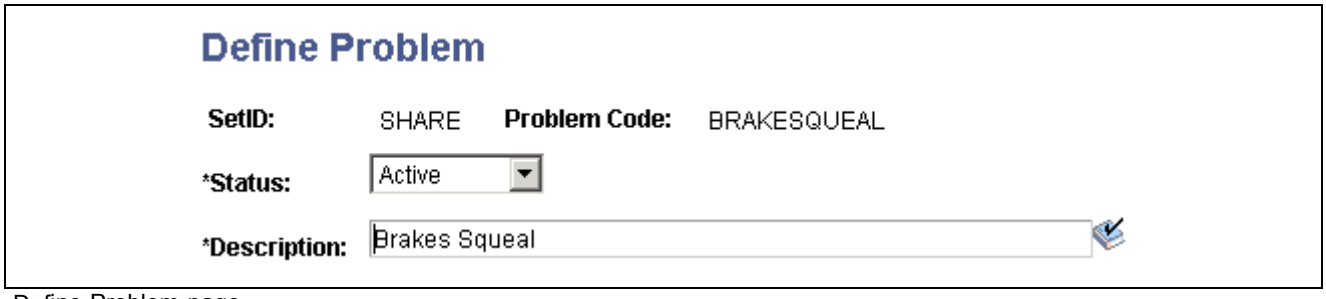
Pages Used To Set Up PCR Data

Page Name	Object Name	Navigation	Usage
Define Problem	WM_PROBLEM_DEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Problem Cause Resolution Setup, Define Problem	Define a problem code to use for PCR tracking.
Define Cause	WM_CAUSE_DEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Problem Cause Resolution Setup, Define Cause	Define a cause code to use for PCR tracking.
Define Resolution	WM_RESOLUTION_DEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Problem Cause Resolution Setup, Define Resolution	Define a resolution code to use for PCR tracking.
Define Problem Group	WM_PCR_DEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Problem Cause Resolution Setup, Define Problem Group	Define the overall problem group and its underlying hierarchy of problem, cause, and resolution codes, as well as optionally associate a problem group with one or more combinations of asset classification parameters.
Asset Classification	WM_GROUP_ASSET	Click the Asset Classification tab.	Associate one or more combinations of asset classification parameters with a problem group for PCR tracking.

Setting Up a Problem Code

Access the Define Problem page.



Define Problem page

Problem Code Set up each problem code by setID so that you can apply them to all work orders and service requests. These codes should be understandable to users.

Status Select either *Active* or *Inactive*. You can change this field from one value to the other at any time.

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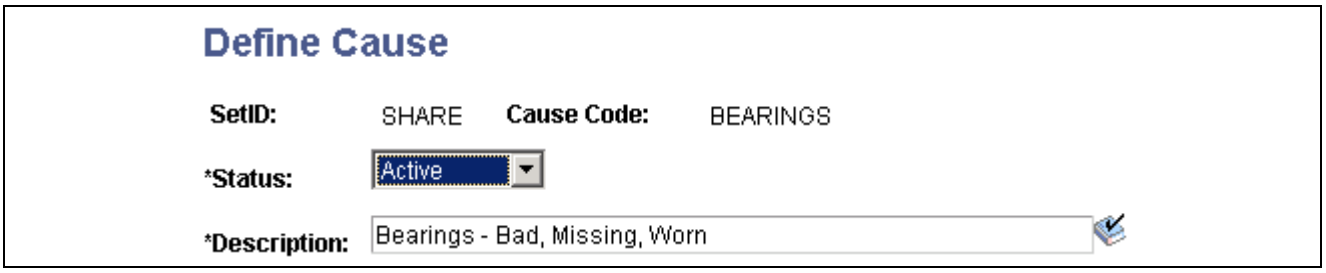
Note. If you change the status of this code to *Inactive*, the code's branch, including any underlying codes, is disabled in the Problem Group hierarchy. At that point, the you can either delete the obsolete branch, or retain it in case you change the status of the code back to *Active*.

Description Enter a description that is clear and meaningful to users.

Setting Up a Cause Code

Access the Define Cause page.



Define Cause page

Cause Code Set up each cause code by setID so that you can apply them to all work orders and service requests. Make sure the code is understandable to users.

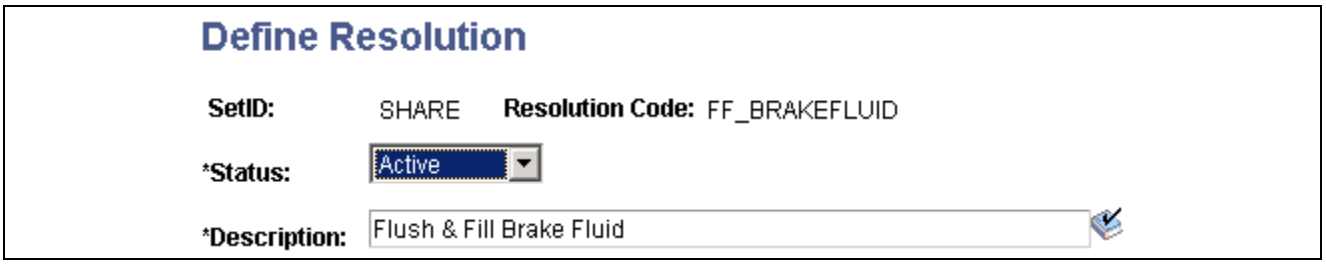
Status Select either *Active* or *Inactive*. You can change this field from one value to the other at any time.

Note. If you change the status of this code to *Inactive*, the code's branch, including any underlying codes, are disabled in the Problem Group hierarchy. At that point, you can either delete the obsolete branch, or retain it in case you change the status of the code back to *Active*.

Description Enter a description that is clear and meaningful to users.

Setting Up a Resolution Code

Access the Define Resolution page.



Define Resolution page

Resolution Code Set up each resolution code by setID so that you can apply them to all work orders and service requests. Make sure the code is understandable to users.

Status Select either *Active* or *Inactive*. You can change this field from one value to the other at any time.

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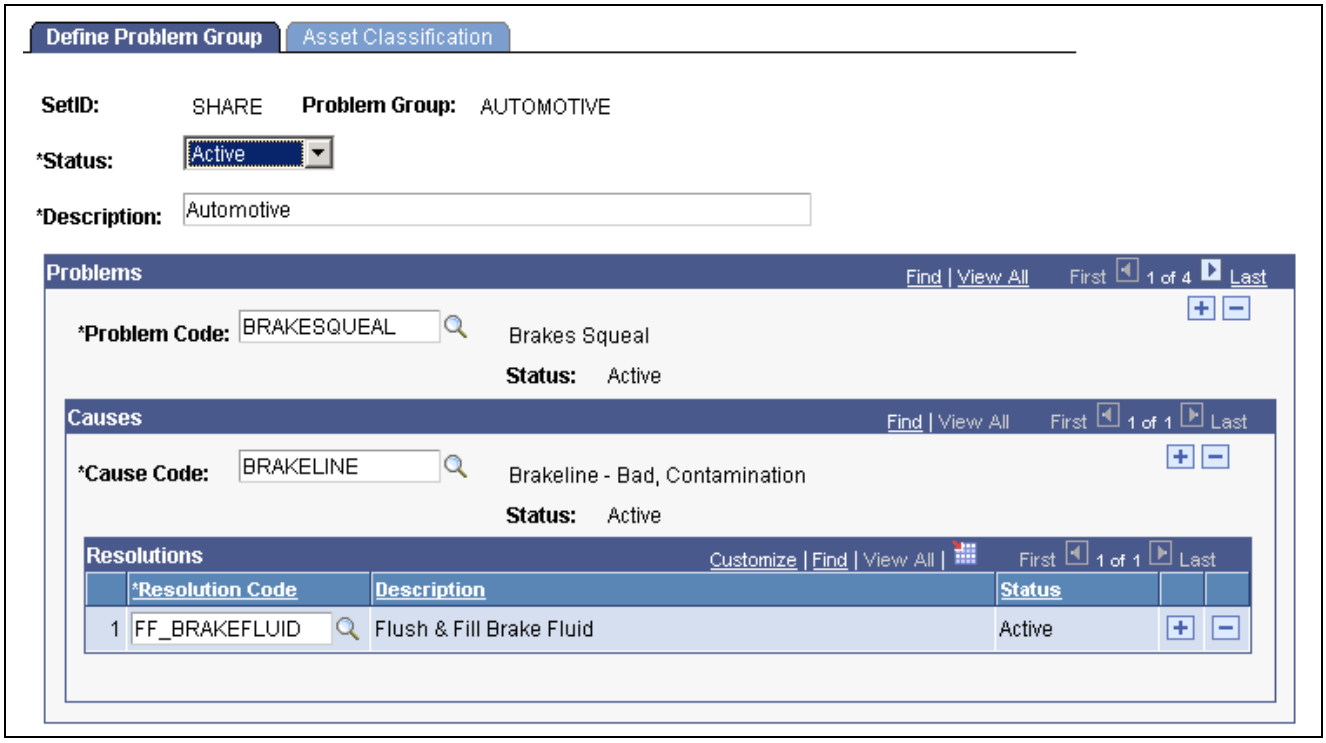
Note. If you change the status of this code to *Inactive*, the code's branch node is disabled in the Problem Group hierarchy. At that point, you can either delete the obsolete node, or retain it in case you change the status of the code back to *Active*.

Description Enter a description that is clear and meaningful to users.

Defining a Problem Group

Access the Define Problem Group page.



Define Problem Group page

Problem Group Enter a value for a Problem Group in the Add a New Value page. Make sure that it is understandable to the user.

Status Select this problem group status as *Active* or *Inactive*.

Description Enter a description that is very clear to users.

Problems

Problem Code Select a code to associate with this group.

Note. When you select a problem code, you do not have to select a cause or a resolution code. You can add more than one problem code to a problem group.

See Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," Understanding PCR Setup and Tracking, page 125.

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Cause Code Select a possible cause for the problem. You can associate more than one cause with a problem.

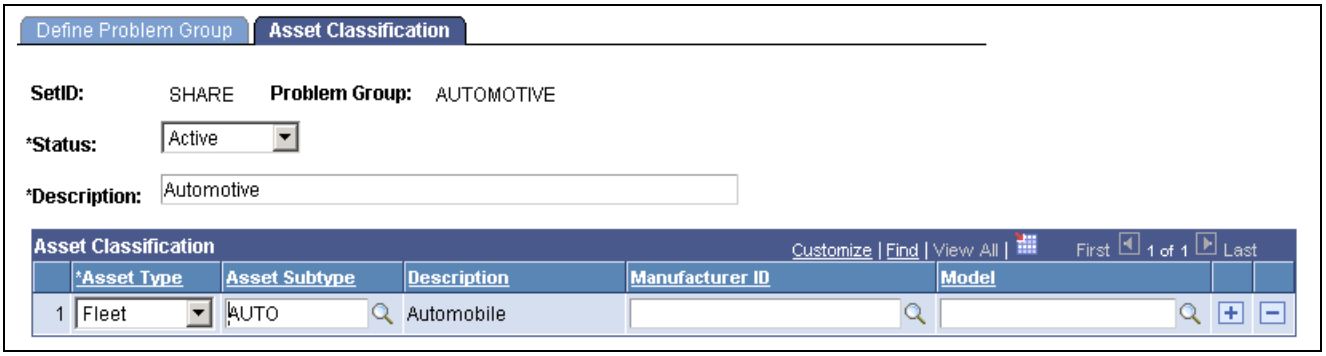
Note. You do not have to enter a cause code.

Resolution Code Select a possible resolution for this problem. You can associate more than one resolution with a problem.

Note. You do not have to enter a resolution code.

Set Up Asset Classification Parameters for a Problem Group

Access the Asset Classification page.



Asset Classification page

Asset Type Select an asset type from the drop-down list.

Subtype Select a subtype based on the selected asset type. Asset subtypes are set up in PeopleSoft Asset Management.

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, "Establishing Asset Processing," Defining Asset Attributes.

Manufacturer and **Model** Select a manufacturer and select a model.

Note. Manufacturers are set up in the Procurement, PeopleSoft Purchasing set up options. You can link models to these manufacturers using the Manufacturer Model Relation in the same location.

Status Select either *Active* or *Inactive* to control the status of the Problem Group, not just the asset classification.

Creating a Problem Tree for Use in Service Requests

To set up a problem tree, use the Problem Tree (WM_PROBLEM_TREE) component.

This section discusses how to create a problem tree.

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Understanding Problem Tree Setup for Use in Service Requests

Service requests enable non–maintenance users to request service for an organization's assets without having to know how to enter work orders and to whom they should submit the service request. Of key importance is the user's ability to identify the problem. The service request guides the user, by means of a single page or a wizard through selecting the options that are necessary to complete the request. The user's selections lead to a specific problem identification. The specific problem is then linked to key work order definition parameters. The problem tree defines a hierarchy which organizes the problem group, asset search fields, location fields, roles, and work order default fields. For example, if the selected problem group is *Mechanical* at a top-level node, it applies to all lower-level nodes until the system encounters a new problem group at a lower level. If the requester selects a specific problem and the bottom-level problem group value is *Electrical*, the system overrides the *Mechanical* problem group with this new value. The system performs an edit to ensure that most of the default fields were entered at some level in the tree. If you enter a bottom level node and no default field was specified at the current level or any level above it, an error displays. This ensures that when you create a service request, values appear in all of the required fields.

Note. You can have as many levels as you want in a problem tree; however, we recommend 3 to 5 levels.

Problems are organized in a tree-like structure in order to prompt you for each problem category from general to specific. You do not see a tree graphic, but instead are prompted to make a series of decisions, each one representing a level in the tree in the Problem Tree page. The system stores the problem category tree structure in a single table with each problem or category pointing to its parent category.

You link problem groups to asset classifications directly in the Define Problem Group component. The Problem Tree component and work order-related components use this linkage. For example, if, while adding a problem category in the problem tree, you enter a problem group, then you can only enter asset classification fields in the Problem Tree page that are associated with the problem group. If you leave the problem group blank, you can enter any asset classifications. Furthermore, the system copies the problem group to a work order created from a service request, but the system does not copy the asset classification fields. Asset classification fields in the problem tree only drive the asset search when a user creates a service request.

See Chapter 13, "Creating a Service Request," Understanding Service Request Creation and Use, page 347.

Pages Used to Set Up a Problem Tree

Page Name	Object Name	Navigation	Usage
Problem Tree	WM_PROBLEM_TREE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Problem Cause Resolution Setup, Problem Tree.	Define each problem category and show the relationship between the problem category levels.

Creating a Problem Tree

Access the Problem Tree page.

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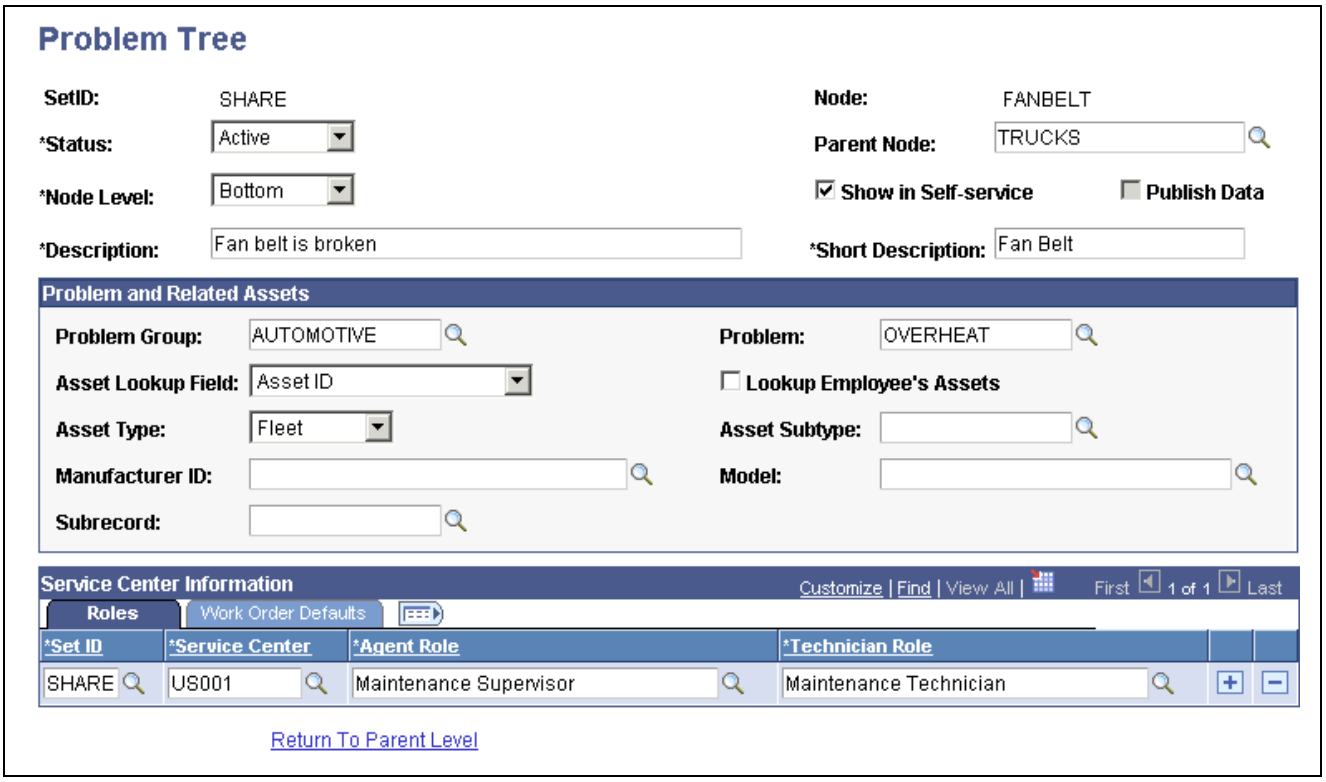

Problem Tree page

Status Select a status of either *Active* or *Inactive* for this node and node level.

Parent Node Displays the name of the parent node, if applicable.

Note. Normally you add child categories by selecting the Add Child Node button, which is only available from a parent node. Selecting the Add Child Node button copies the node value into the parent node of the new child record. This creates the link for you. However, you can change the parent node value of an existing record which effectively moves the child and all of the child's children to the new parent.

Node Level Defines the level in the tree in which the problem category resides.

- *Top*
- *Middle*
- *Bottom*

Top level categories display in the first Request Type page of the Service Request Wizard component and in the first Request Type field in the Request Detail group box of the single page Service Request page. Middle-level categories display in the subsequent Request Type pages of the wizard and in the subsequent Request Type field of the single page Service Request page. Bottom-level categories display in the last Request Type page of the wizard and in the last Request Type field of the single page Service Request page. You cannot change the node level for a middle node unless you delete all of its children first. You cannot change the node level for a top node level.

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Note. You can have as many levels as you want in a problem tree; however, we recommend 3 to 5 levels.

Show in Self-Service Component Select this check box to display the problem category in the Service Request Wizard and the single Service Request page.

Publish Data Select this check box when you want to publish this problem tree branch as a message using Integration Broker to third-party help desk products.

Note. This check box should only be available for selection for a top-level node.

See *Enterprise PeopleTools PeopleBook: Intregration Broker*

Problem and Related Assets

The values that you set up in this group box determine which fields appear Request Detail group box of the service request. The asset classification fields specified here help to refine the asset search on the service request so that users can quickly find the assets related to the specific problem selected.

Asset Lookup Field Select the type of field that you want to appear in the Service Request Wizard or single page Service Request from this drop-down list:

- *Asset ID*
- *Do not display asset fields*
- *Serial Number*
- *Tag Number*
- *Vehicle ID Number*

Problem Group Select a problem group to associate with this node. If you select a problem group that is associated with specific asset classification parameters, then the asset classification parameters available for selection here are restricted to only those asset classification parameters that fall within the parameters specified for the problem group. If you do not select a problem group, then you can select any asset classification parameters that you want here.

Lookup Employee's Assets Select this check box to display only the requester's assets when selecting assets in the Service Request wizard and Create Service Request pages.

Subrecord You must enter the value *WM_MOVE_SBR* for any problem categories that handle a facilities move request. Otherwise, leave this field blank.

Service Center Information - Roles

Access the Roles tab.

SetID Select the appropriate setID, which identifies the correct LOCATION_TBL to use for the service center.

Service Center Select a service center. This defines the values that are selectable in the Service Center drop-down list when you create a service request.

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Agent Role Select a role for the agent assigned to a service request. This value appears when you access the Service Request Inbox. If the service request agent belongs to more than one agent role and those roles are entered on the problem tree, the agent must select one of the roles from the Agent Role field drop-down list on the Service Request Inbox page.

Note. You use PeopleTools role definition functionality to set up agent and technician roles.

See *Enterprise PeopleTools PeopleBook: Security Administration, Setting Up Roles*

Technician Role Select a role to apply to a technician assigned to a service request. In the Service Request Inbox, the prompt list for the Assigned To field prompt is populated with the user IDs that belong to the technician role identified here. The selected technician displays in the Assigned To field on the service request. If the agent also belongs to the technician role, the user ID of the agent appears as the default value in the Assigned To field. The agent can override this user ID and select a different technician from the list.

See *Enterprise PeopleTools PeopleBook: Security Administration, Setting Up Roles*

Service Center Information - Work Order Defaults

Access the Work Order Defaults tab.

SetID Select the appropriate setID, which identifies the correct LOCATION_TBL to use to enable you to select the service center.

Note. This setID value appears as the default value from the value you selected in the Roles grid.

Service Center Select a service center. This defines the values that are selectable in the Service Center drop-down list when you create a service request.

Note. If you select this service center value as the service center for a service request, it causes the values specified in this Work Order Defaults grid for the work order business unit, work order type, service group, and priority code to display as the default values in a work order that is created from the service request.

Business Unit Select the work order business unit value that you want to populate the Business Unit field for a work order that is created from a service request.

Service Group Select the service group value that you want to populate the Service Group field for a work order that an agent or technician creates from a service request.

Work Type Select the work type (work order type) value that you want to populate the Work Type field for a work order that an agent creates from a service request.

Priority Select the priority code value that you want to populate the Priority Code field for a work order that an agent creates from a service request.

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Next Problem Level

Displays the problem categories that are one node level down from the current problem category. This grid appears if the Node Level is *Top* or *Middle*.

Note. This grid does not appear if the Node Level value is *Bottom*.

Child Node Click this link to drill down to the child node or next problem level.

Note. You can click the Return to Parent Level link to return to the Parent Node level.

Add Child Node When accessing the Parent Node Level, click this button to access a blank version of the Problem Tree page where you can add a child node to the problem tree.

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CHAPTER 7

Setting Up Statuses for Service Requests and Work Orders

This chapter presents an overview of Oracle's PeopleSoft Enterprise Mainenance Management service request and work order statuses and discusses how to:

- Define service request statuses.
- Define work order statuses.

Understanding Service Request and Work Order Statuses

PeopleSoft Maintenance Management uses system-defined internal statuses and user-defined statuses to control the functionality and flow of service requests and work orders as they progress through their life cycles in the system. Service request statuses and work order statuses are not related and are defined in separate components.

Service request statuses control the functionality and the flow of only the service request, which is created separately from a work order. Any user can create a service request from the self-service components. Using these components does not require access on the part of the requester to the work order or other components of PeopleSoft Maintenance Management. However, service requests are assigned to agents and technicians within PeopleSoft Maintenance Management. Agents can also create new service requests from within PeopleSoft Maintenance Management. Once a service request is created, the agent may choose to create a work order, depending on the problem reported. When a work order is created from a service request, the system uses the work order status definitions to control the behavior of the work order from creation through closure of the work order. The service request status definitions still control the service request, even if the agent created a work order from the service request.

Users can also create work orders from PeopleSoft CRM Help Desk 8.9 and above and third party help desk applications, PeopleSoft Project Costing and PeopleSoft Program Management. However, the work order functionality is performed completely within PeopleSoft Maintenance Management. The statuses for a work order are set up separately to control the functionality and flow of work orders as they progress through PeopleSoft Maintenance Management. In both service requests and work orders, the status transitions are primarily performed manually by the user, with the exception of the service request close and the work order complete and close statuses.

See Chapter 13, "Creating a Service Request," Understanding Service Request Creation and Use, page 347.

See Chapter 14, "Creating a Work Order," Understanding Work Orders, page 363.

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Defining Service Request Statuses

To set up service request statuses use the Service Request Status (WM_WR_STATUS) component.

This section provides an overview of service request statuses and discusses how to set up service request statuses.

Understanding Service Request Statuses

To manage the processing of a service request, PeopleSoft Maintenance Management provides a set of system-defined internal statuses that have specific requirements. In addition, PeopleSoft Maintenance Management provides predefined statuses in the delivered data that correspond to the internal statuses. Your organization can use these statuses as defined or use them as a basis for setting up your own status definitions based on your organization's business logic and processes. You must map these user-defined statuses to the system-defined internal statuses. For example, you can create statuses such as open-new, in progress-assigned, and open-awaiting information, and map each of them to the required system-defined internal status, *open*.

This table describes how the system-defined internal statuses for a service request work in the system:

Service Request System-Defined Internal Status	Description
Closed	This status occurs when a requester clicks the Close button in the service request, the agent selects *Close* from the status drop-down list box, or the service request Close (WM_CLOSE_WR) process changes the status from *Complete* to *Closed* based on the expiration of a specific number of days specified in the service request business unit.
Complete	This status occurs when the agent selects *Complete* in the status drop-down list box or a user completes the work order associated with the service request.
Canceled	This status occurs when the agent selects Cancel in the status drop-down list box or the associated work order is cancelled.
Open	This status occurs when you create a service request.
Work in Progress	This status occurs when the agent selects it from the status drop-down list box.
Work Order Created	This status occurs when an agent creates a work order from a service request.

This table lists the statuses that PeopleSoft Maintenance Management predefines for service requests in the sample data for users and describes how they are mapped to PeopleSoft Maintenance Management required system-defined internal statuses. You can use these sample data statuses as they are or modify them based on the needs of your organization:

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PeopleSoft Maintenance Management Predefined Sample Data User Service Request Status	PeopleSoft Maintenance Management Required System-Defined Internal Status
Closed	Closed
Canceled	Canceled
Complete	Complete
In Progress — Assigned.	Work in Progress
In progress — Awaiting information	Work in Progress
New	Open
Work Order Created	Work Order Created

This table describes how a system-defined internal service request status affects the locking of the service request document:

System-Defined Internal Service Request Status	Is Service Request Document Locked?
Closed	Yes – All fields are read only.
Canceled	Yes – All fields are read only.
Complete	Yes – Service request is locked, but you can change the status back to an Open status to unlock the service request and make changes.
Open	No
Work In Progress	No
Work Order Created	Yes – Locks fields common to service request and work order .

Service Request Status Transitions

Service request status transitions are triggered by user interaction and automatic processing. An agent or administrator can change a status by selecting a status in the Status field on the service request. Automatic status transitions are triggered when a work order is created, completed or canceled. A requester can only close or reopen (change from complete back to open) a completed service request.

Note. The user-defined service request status values, which are used for the allowable status transitions, depend on how an organization sets up each service request status.

Setting up the service request statuses is required so that an agent or administrator can select allowable status transitions for each status. Users cannot select the WO Created status, because it is set by the PeopleSoft Maintenance Management program.

The following table describes the allowable internal status transitions for each service request status. It does not describe the allowable transitions as delivered in the sample data:

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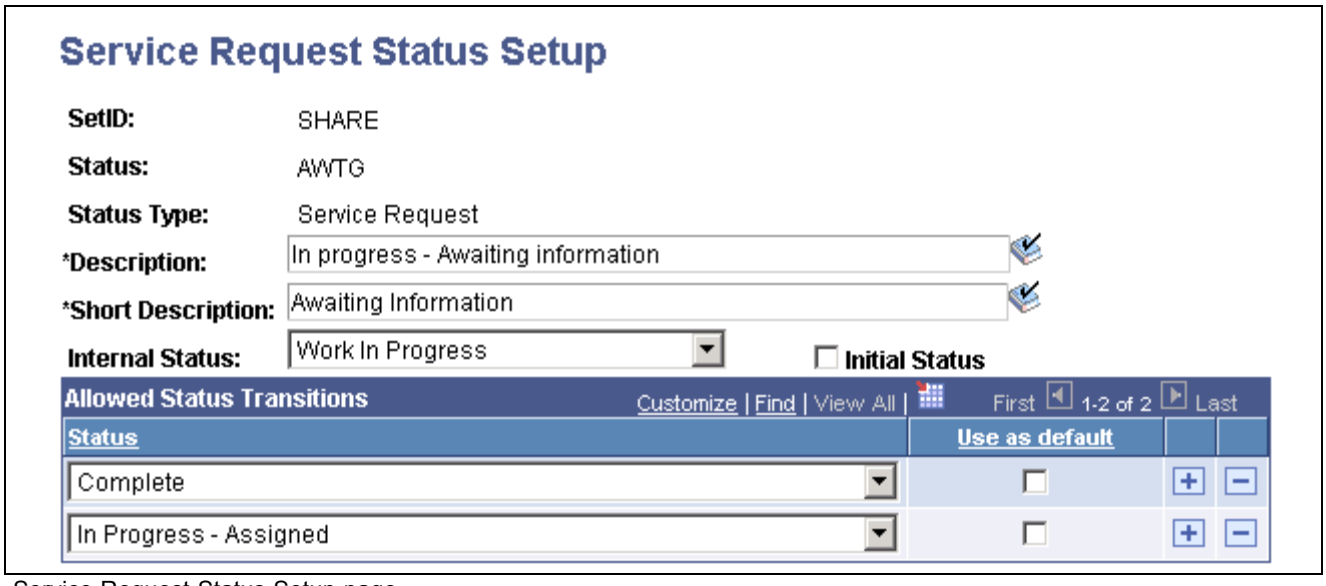
From Status/To Status	Open	Work in Progress	Complete	Canceled	Closed	WO Created
Open	Yes	Yes	Yes	Yes	No	No
Work in Progress	No	Yes	Yes	No	No	No
Complete	Yes	Yes	No	No	Yes	No
Closed	No	No	No	No	No	No
Canceled	No	No	No	No	No	No
WO Created	No	No	Yes	No	Yes	N/A

Page Used To Define Service Request Statuses

Page Name	Object Name	Navigation	Usage
Service Request Status Setup	WM_STATUS	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Service Request Status	Defines service request status values specific for an organization and matches them with the Maintenance Management required system-defined internal statuses.

Setting Up Service Request Statuses

Access the Service Request Status Setup page.



Service Request Status Setup page

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Status Enter a status code when you add a new value that is recognizable to your end users. This value is matched with one of the required system-defined internal status values.

Status Type Displays default value of *Service Request*.

Internal Status Select the Internal Status to match with this user-defined status. Internal statuses for service requests include:

- *Canceled.*
- *Closed.*
- *Complete.*
- *Open.*
- *Work in Progress.*
- *Work Order Created.*

Initial Status Select this check box if you want this value to be the initial status when a service request is created. You can only select one of the service request statuses at any given point in time.

Allowed Status Transitions

Status Lists allowable status transitions based on the internal status transition you select and the number of defined statuses you created.

Note. The Allowed Status Transitions group box appears only if you create a status with an internal status value of *Open, Work in Progress, Work Order Created,* and *Complete*. It does not display if the internal status value is *Canceled* or *Closed*.

Use as default Select one or more of the Use as Default check boxes to indicate the new status of the service request when a user clicks the Reopen or Close buttons on the Service Request. If two or more transition statuses have the same internal status, then you can only check one of them. We recommend that you do not change the status setup as delivered, but if you do, make sure the transition grid for the Complete status contains at least one transition status for *Work in Progress* and one for *Closed* selecting the Use as Default check box on each.

For example, the current status of a service request is *Complete* and you want to reopen the service request by changing the status back to *Assigned*. If you have multiple user defined assigned statuses, then you must identify which of these user defined assigned statuses is the default status that you want to display when you reopen a service request. This also applies when you close a service request.

Defining Work Order Statuses

To set up work order statuses use the Work Order Status (WM_WO_STATUS) component .

This section provides an overview of work order statuses and discusses how to:

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- Create work order statuses.
- Set up work order statuses.

Understanding Work Order Statuses

You must set up work order statuses separately for the work order header and the work order task. The work order header status reflects the state of the work order based on the current work order task statuses. You cannot modify this status. Like service request statuses, you can establish statuses that are applicable to their organization and map these statuses to PeopleSoft Maintenance Management system-defined internal statuses for work orders.

You are *not* required to set up user-defined statuses for each system-defined internal status for either work order header statuses or work order task statuses. However, you *must* set up at least one user-defined status for each of these internal statuses:

- Open
- Complete
- Closed

Important! When you set up work order header statuses, you can set up only *one* user-defined status for each of the system-defined internal statuses. However, for work order tasks, you may set up more than one user-defined status for each of the work order task system-defined internal statuses.

Work Order Header Statuses

The work order header status is a passive indicator of the state of all the work order tasks under this work order. Users may not directly modify the work order header status. The system reassesses and potentially changes the work order header status when you access or save the work order based on an internal calculation that determines which task status carries the most weight and should thus apply to the work order header.

The system-defined internal statuses are the same for the work order header and the work order task. To weight the task statuses to determine the status of the work order header, the internal statuses are prioritized from 1 to 8, with 1 being the highest priority. This is described in the following table:

Order	State	Description
1	Work in Progress	At least one work order task has been set to a Work In Progress status, typically meaning that work execution has begun on that task.
2	Awaiting Schedule	At least one work order task has been set to Awaiting Schedule and there are no tasks in Work in Progress. This status is typically encountered after a work order is approved.
3	Open	At least one work order task has been set to Open and there are no tasks in either Work in Progress or Awaiting Schedule status. This status would normally occur when a user creates a new work order and saves it with at least one work order task.

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Order	State	Description
4	On Hold	At least one work order task has been set to On Hold and there are no tasks in Work in Progress, Awaiting Schedule or Open status. This status would normally occur when execution of a work order task has been interrupted due to a problem. **Note.** You can only go back to the status prior to setting the status on hold, regardless of transitions defined for the On Hold status.
5	Scheduled	User changes to this status when at least one work order task has been Scheduled and there are no tasks in Work in Progress, Awaiting Schedule, Open, or On Hold status.
6	Complete	All tasks are complete or canceled, implying that the work associated with the work order task has been completed. **Note.** Standing work orders do not automatically move to a status of Closed, Canceled, or Complete. When all tasks are completed for a standing work order, the work order status stops immediately at the previous status instruction. You identify a standing work order by selecting a check box on the Miscellaneous page of the work order.
7	Closed	All tasks are closed or canceled. The work order is closed upon completion of all of the tasks and at the end of the grace period. No status transitions are permitted once a work order task is closed.
8	Canceled	All tasks are canceled. The work order task has been canceled. No status transitions are permitted for a work order task once it is canceled. **Note.** If you have not assigned resources to a task, you should delete the task instead of canceling it. You cannot uncancel a task.

The system updates and displays the work order header status based on all of the statuses of the work order tasks that fall under it. It uses the highest status priority as the work order header status. The following example shows the effect of different task statuses on the work order header for WO001:

Status of Task #1	Status of Task #2	Status of Task #3	Status of Task #4	Work Order Header Status	Notes
Open Priority = 3	Open Priority = 3	Open Priority = 3	Open Priority = 3	Open	Open is the most outstanding status for all the tasks.

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Status of Task #1	Status of Task #2	Status of Task #3	Status of Task #4	Work Order Header Status	Notes
Closed Priority = 7	Canceled Priority = 8	Canceled Priority = 8	Canceled Priority = 8	Closed	The Closed status in Task 1 has a priority of 7 which is higher than the Canceled status priority of 8 in the system.
Closed Priority = 7	Complete Priority = 6	Complete Priority = 6	Canceled Priority = 8	Complete	The Complete status has a priority of 6, which exceeds the Canceled priority of 8 and the Closed priority of 7 in the system.
Work in Progress Priority = 1	Open Priority = 3	Open Priority = 3	On Hold Priority = 4	Work in Progress	The Work in Progress has the highest priority (1) in the system.
Open Priority = 3	Scheduled Priority = 5	Closed Priority = 7	Complete Priority = 6	Open	Task #1 has a status of Open with a priority of 3, which is the highest priority in the system.

The relationship between the workflow approval statuses and the work order header statuses determines if and when you can add a task to a work order. The following table describes this relationship.

Workflow Statuses / WO Header Statuses	Work in Progress	Awaiting Schedule	Open	On Hold	Scheduled	Complete	Closed	Cancelled
No Workflow Approval	Yes	Yes	Yes	Yes	Yes	No	No	No
Workflow Approval Initial, Canceled, Denied	No	No	Yes	Yes	No	No	No	No

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Workflow Statuses / WO Header Statuses	Work in Progress	Awaiting Schedule	Open	On Hold	Scheduled	Complete	Closed	Cancelled
Workflow Approval, Pending Approval	N/A	N/A	No	N/A	N/A	N/A	N/A	N/A
Workflow Approval, Approved	No	No	No	No	No	No	No	No

The work order header status level defines only the status display behavior at the work order header level. The work order task status display behavior is defined only by the work order task status. However, the work order header status does define whether you can insert a new task into the work order. The following table indicates the operations that you can and cannot perform based on each of the internal work order header status settings.

Work Order Activity / Internal Status	Open	Closed/ Canceled	Awaiting Schedule	Scheduled	Complete	Work in Progress
Add notes.	Yes	No	Yes	Yes	Yes	Yes
Delete notes.	No	No	No	No	No	No
Add more tasks.	Yes	No	Yes, based on workflow rules.	Yes, based on workflow rules.	No	Yes, based on workflow rules.
Delete task.	Yes, as long as no assignments were made and based on workflow rules.	No	Yes, as long as no assignments were made and based on workflow rules.	No	No	No
Add attachments.	Yes	No	Yes	Yes	Yes	Yes.
Modify attachments.	Yes	No	Yes	Yes	Yes.	Yes.
Delete attachments.	Yes	No	Yes	No	No	No
Add Job Templates.	Yes, based on workflow rules.	No	Yes, based on workflow rules.	Yes, based on workflow rules.	No	Yes, based on workflow rules.

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Work Order Task Statuses

Users manually change the statuses for work order tasks. The work order task status reflects the true state of the work order task, assuming that there is no discrepancy between work order task status and the state of the actual work order task. For example, if the work order task status in the system is Work in Progress, but the work being performed in the field is actually On Hold due to a delay in the delivery of a part.

The following table indicates the operations that you can and cannot perform based on each of the internal work order task status settings:

Workflow Status = Pre-Approved (No Approval Required)								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Add Labor Requirement.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Modify /Delete Labor Requirement.	No	Yes, depending on if crew assigned to Requirement, or Requirement is being copied to Schedule.	Yes, depending on if crew assigned to Requirement, or Requirement is being copied to Schedule.	Yes, depending on if crew assigned to Requirement, or Requirement is being copied to Schedule.	No	No	No	No
Add Inventory Requirement.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Modify/ Delete Inventory Requirement.	No	Yes, depending on Requirement being copied to Schedule.	Yes, depending on Requirement being copied to Schedule.	Depends on prior status.	No	No	No	No
Add Tools Requirement.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Modify/ Delete Tools Requirement.	No	Yes, depending on Requirement being copied to Schedule.	Yes, depending on Requirement being copied to Schedule.	Depends on prior status.	No	No	No	No

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Workflow Status = Pre-Approved (No Approval Required)								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Add Purchase/ On-Hand Requirement.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Modify/ Delete Purchase/ On-Hand Requirement.	No	Yes, depending on Requirement being copied to Schedule.	Yes, depending on Requirement being copied to Schedule.	Depends on prior status.	No	No	No	No
Add Labor Schedule.	No	Yes	Yes	Depends on prior Status.	No	No	No	No
Modify/ Delete Labor Schedule.	No	Each row depends on Assignment Status.	Each row depends on Assignment Status.	Depends on prior status.	No	No	No	No
Add Tool Schedule.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Modify/ Delete Tool Schedule.	No	Each row depends on Assignment Status.	Each row depends on Assignment Status.	Depends on prior status.	No	No	No	No
Add Inventory Schedule.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Modify/ Delete Inventory Schedule.	No	Each row depends on Assignment Status.	Each row depends on Assignment Status.	Depends on prior status.	No	No	No	No
Add Purchase/ On-Hand Schedule.	No	Yes	Yes	Depends on prior status.	No	No	No	No

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Workflow Status = Pre-Approved (No Approval Required)								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Modify/ Delete Purchase/ On-Hand Schedule.	No	Each row depends on Assignment Status.	Each row depends on Assignment Status.	Depends on prior status.	No	No	No	No
Modify Distribution.	No	Depends on assignments existing on Schedule rows.	Depends on assignments existing on Schedule rows.	Depends on prior status.	No	No	No	No
Modify Project Information.	No	Depends on assignments existing on Schedule rows.	Depends on assignments existing on Schedule rows.	Depends on prior status.	No	No	No	No
Modify Asset BU and Asset ID.	No	No	Yes	Depends on prior status.	No	No	No	No
Allow further status change.	Yes	Yes	Yes	Only to prior status or Initial if the user saved the task originally as On Hold.	Yes	Yes, depending on user preferences security feature that would allow users to set the status to complete or to manually close the task.	Yes, only to a Complete Internal Status. This must be a manual close and depends on security setup.	No
Update task level scheduled start and end dates.	No	Yes	Yes	Depends on prior status.	No	No	No	No

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Workflow Status = Pre-Approved (No Approval Required)								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Record Actuals.	Yes	Yes	Yes	Yes	Yes	Yes, for everything but Inventory Issues, POs, and Requisitions.	No	No
Add task note.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Modify task note.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Delete task note.	No	No	No	No	No	No	No	No
Add task instruction.	Yes	Yes	Yes	Yes	Yes	No	No	No
Modify task instructions.	Yes	Yes	Yes	Yes	Yes	No	No	No
Delete task instruction.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Add checklist.	Yes	Yes	Yes	Yes	Yes	No	No	No
Modify checklist.	Yes	Yes	Yes	Yes	Yes	No	No	No
Delete checklist.	No	Yes	Yes	Yes	No	No	No	No
Add attachment.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Modify attachment.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Delete attachment.	No	Yes	Yes	Depends on prior status.	No	No	No	No

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Workflow Status = Pre-Approved (No Approval Required)								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Delete task.	No	Depends on assignments existing on Schedule rows.	Depends on assignments existing on Schedule rows.	No	No	No	No	No
Assign task templates.	No	Yes	Yes	Depends on prior status.	No	No	No	No
Add Warranty Claim.	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Modify/ Delete Warranty claim.	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No

Task table continued.

Workflow Approval Status = Initial, Canceled, or Denied			
Task Activity / Internal Task Status	**(3) Open**	**(4) On Hold**	**(8) Canceled**
Modify Labor Requirements.	Yes	Depends on Open status.	No
Modify Inventory Requirements.	Yes	Depends on Open status.	No
Modify Tools Requirements.	Yes	Depends on Open status.	No
Modify Purchase/ On-Hand Requirements.	Yes	Depends on Open status.	No
Modify Labor Schedule	Not available.	Not available.	No
Modify Tool Schedule	Not available.	Not available.	No
Modify Inventory Schedule	Not available.	Not available.	No
Modify Purchase/ On-Hand Schedule	Not available.	Not available.	No

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Workflow Approval Status = Initial, Canceled, or Denied			
Task Activity / Internal Task Status	**(3) Open**	**(4) On Hold**	**(8) Canceled**
Modify Accounting. Template	Not available.	Not available.	No
Modify Project Information	Yes	Depends on Open status.	No
Modify Asset BU and Asset ID.	Yes	Depends on Open status.	No
Allow further status change.	Only the ones listed here.	Depends on Open status.	No
Record Actuals.	No	Depends on Open status.	No
Modify task note.	Yes	Depends on Open status.	No
Modify task instruction.	Yes	Depends on Open status.	No
Modify check list.	Yes	Depends on Open status.	No
Modify attachment.	Yes	Depends on Open status.	No
Cancel task.	Yes	Depends on Open status.	No
Delete task.	Yes	Depends on Open status.	No
Add Warranty Claim.	Yes	Yes	No
Modify/ Delete Warranty Claim.	Yes	Yes	No

Task statuses continued.

Workflow Approval Status = Pending Approval		
Task Activity / Internal Task Status	**(3) Open**	**(4) On Hold**
Modify Labor Requirement.	No	Depends on Open status.
Modify Inventory Requirement.	No	Depends on Open status.
Modify Tools Requirement.	No	Depends on Open status.
Modify Purchase/ On-Hand Requirement.	No	Depends on Open status.
Modify Labor Schedule.	Not available.	Not available.
Modify Tool Schedule.	Not available.	Not available.

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Workflow Approval Status = Pending Approval		
Task Activity / Internal Task Status	**(3) Open**	**(4) On Hold**
Modify Inventory Schedule.	Not available.	Not available.
Modify Purchase/ On-Hand Schedule.	Not available.	Not available.
Modify Accounting. Template.	No	Not available.
Modify Project Information.	No	Depends on Open status.
Modify Asset BU and Asset ID.	No	Depends on Open status.
Allow further status change.	No	Depends on Open status.
Update task level scheduled start and end dates.	Not available.	Depends on Open status.
Record Actuals.	No	Depends on Open status.
Modify task note.	Yes	Depends on Open status.
Modify task instructions.	Yes	Depends on Open status.
Modify check list.	Yes	Depends on Open status.
Modify attachment.	Yes	Depends on Open status.
Cancel task.	No	Depends on Open status.
Delete task.	No	Depends on Open status.
Add Warranty Claim.	Yes	Yes
Modify/Delete Warranty Claim.	Yes	Yes

Task statuses continued.

Once a work order with workflow approval is approved, users cannot add tasks or enter requirements. However they can enter schedule rows to existing tasks, always depending on the current status of the task.

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Workflow Status = Approved								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Modify Labor Requirement.	No	No	No	No	No	No	No	No
Modify Inventory Requirement.	No	No	No	No	No	No	No	No
Modify Tool Requirement.	No	No	No	No	No	No	No	No
Modify Purchase/ On-Hand.	No	No	No	No	No	No	No	No
Modify Labor Schedule.	No	Each row depends on Assignment status.	Each row depends on Assignment status.	Depends on prior status.	No	No	No	No
Modify Tool Schedule.	No	Each row depends on Assignment status.	Each row depends on Assignment status.	Depends on prior status.	No	No	No	No
Modify Inventory Schedule.	No	Each row depends on Assignment status.	Each row depends on Assignment status.	Depends on prior status.	No	No	No	No
Modify Purchase/ On-Hand Schedule.	No	Each row depends on Assignment status.	Each row depends on Assignment status.	Depends on prior status.	No	No	No	No
Modify Distribution.	No	Each row depends on Assignment status.	Each row depends on Assignment status.	Depends on prior status.	No	No	No	No
Modify Project Information.	No	No	No	No	No	No	No	No

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Workflow Status = Approved								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Modify Asset BU and Asset ID.	No	No	No	No	No	No	No	No
Allow further status change.	Yes	Yes	Yes	Yes	Yes	Yes, depending on user preferences security setting to set status to Complete or Closed.	Yes, depending on user preferences security setting to set status to Complete or Closed.	No
Update task level scheduled start and end dates.	Yes	Yes	Yes	Only to prior status or Initial if the user saved the task originally as On Hold.	No	No	No	No
Record Actuals.	Yes	Yes	Yes	Yes	Yes	Yes for everything but Inventory Issues, POs and Requisitions.	No	No
Modify task note.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Modify task instructions.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Modify check list.	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Modify attachment.	Yes	Yes	Yes	Yes	Yes	Yes	No	No

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Workflow Status = Approved								
Task Activity / Internal Task Status	**(1) Work in Progress**	**(2) Awaiting Schedule**	**(3) Open**	**(4) On Hold**	**(5) Scheduled**	**(6) Complete**	**(7) Closed**	**(8) Canceled**
Cancel task.	No	Depends on Assignments existing on Schedule rows.	Depends on Assignments existing on Schedule rows.	Only to prior status or Initial if the user saved the task originally as On Hold.	Depends on Assignments existing on Schedule rows.	No	No	No
Delete task.	No	No	No	No	No	No	No	No
Add Warranty Claim.	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Modify/ Delete Warranty Claim.	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No

Note. The Approval Status field appears in the work order header. This field is controlled by workflow approval.

See Chapter 15, "Approving Work Orders," Understanding the Work Order Approval Process, page 407.

Status Transitions

When you set up task statuses, with the exception of the *closed* and *canceled* statuses, you set up the transitions from one status to another that are allowed in the system. You cannot set up allowable status transitions for work order header statuses. Users can manually change the status based on the allowable transitions for a work order task. The work order header status is read-only.

When a work order task is created, the user selects the value in the Status field based on the allowable transitions for each status.

Note. Users can define more than one status transition based on an internal status. For example, you can set up the On Hold internal status as On Hold - Awaiting Information and On Hold - Resource shortage.

The following diagram illustrates status transitions for work orders and work order tasks:

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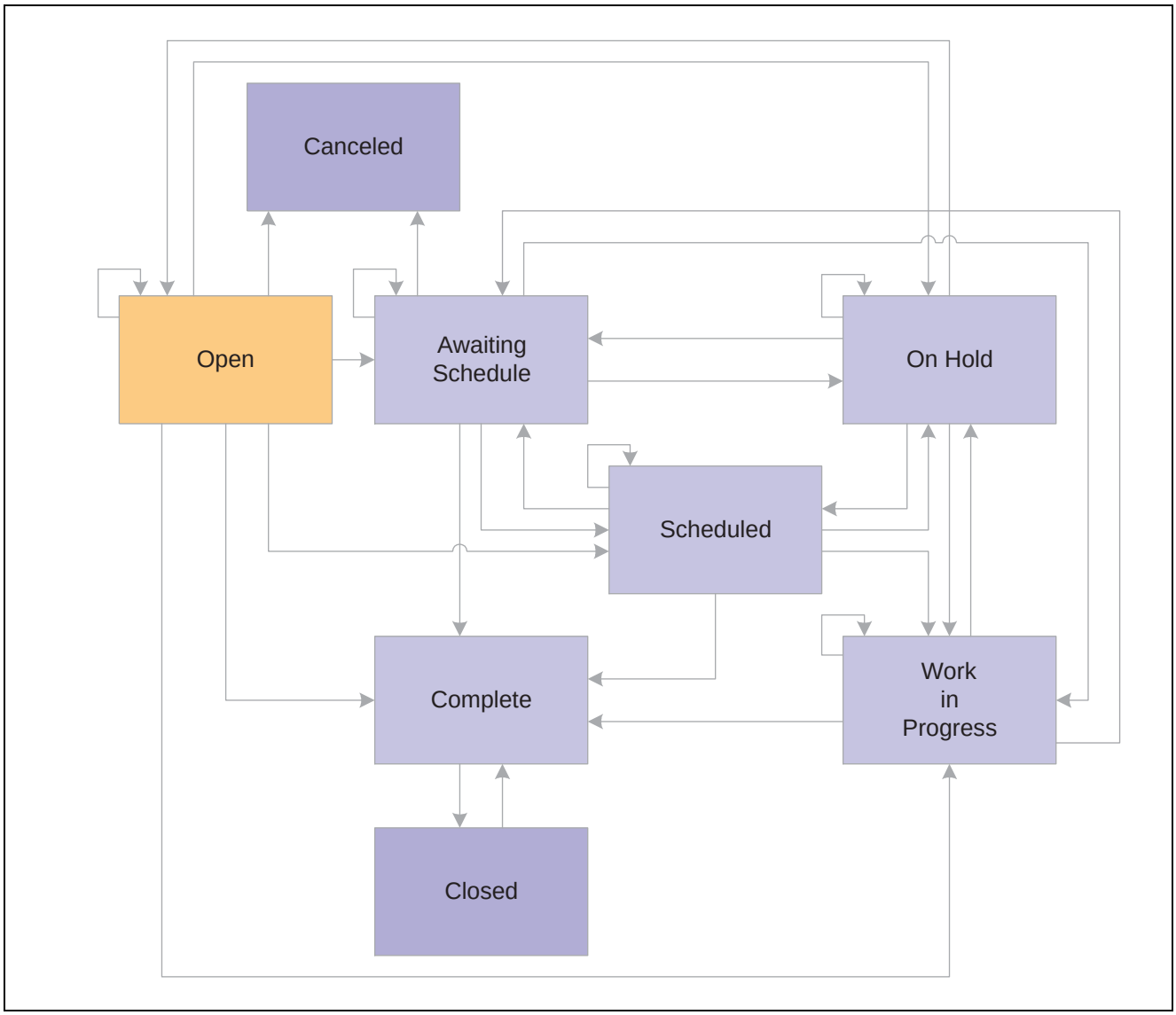

Maintenance Management Work Order and Work Order Task Status Transitions

The following table describes the allowable work order task status transitions based on each internal status:

From Status/To Status	Open	Awaiting Schedule	Scheduled	Work in Progress	Complete	Closed	Canceled	On Hold
Open	Yes	Yes	Yes	Yes	Yes	No	Yes* *Before you make any assignments.	Yes
Awaiting Schedule	No	Yes	Yes	Yes	Yes	No	Yes *Before you make any assignments.	Yes

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From Status/To Status	Open	Awaiting Schedule	Scheduled	Work in Progress	Complete	Closed	Canceled	On Hold
Scheduled	No	Yes	Yes	Yes	Yes	No	No	Yes
Work in Progress	No	Yes	No	Yes	Yes	No	No	Yes
Complete	No	No	No	No	No	Yes	No	No
Closed	No	No	No	No	Yes* * Only when you close a task manually.	No	No	No
Canceled	No	No	No	No	No	No	No	No
On Hold	Yes* * Can only return back to a status that has the same Internal Status as the one prior to On Hold. If the previous status is On Hold, then the system retrieves the status prior to any On Hold status.	Yes* * Can only return back to a status that has the same Internal Status as the one prior to On Hold. If the previous status is On Hold, then the system retrieves the status prior to any On Hold status.	Yes* * Can only return back to a status that has the same Internal Status as the one prior to On Hold. If the previous status is On Hold, then the system retrieves the status prior to any On Hold status.	Yes* * Can only return back to a status that has the same Internal Status as the one prior to On Hold. If the previous status is On Hold, then the system retrieves the status prior to any On Hold status.	Yes* * Can only return back to a status that has the same Internal Status as the one prior to On Hold. If the previous status is On Hold, then the system retrieves the status prior to any On Hold status.	No	No	Yes* * Can only return back to a status that has the same Internal Status as the one prior to On Hold. If the previous status is On Hold, then the system retrieves the status prior to any On Hold status.

The editable fields on the Crew Scheduling Workbench must follow the enabling and disabling rules based on the work order task status. The following table outlines the rules for fields that are unique to crew scheduling:

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Field/Status	Open	Awaiting Schedule	Scheduled	Work in Progress	On Hold
Crew	Enabled depending on Completed Date not present and Carryover Hours <>0.	Enabled depending on Completed Date not present and Carryover Hours <> 0.	Disabled	Disabled	Enabled or disabled depending on prior status.
Carryover Hours	Enabled depending on the Completed Date field being blank and a crew has been assigned. Also depends on the selection of the Report Crew Carryover Hours check box in User Preferences, Maintenance Management page.	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Carryover Hours check box in User Preferences, Maintenance Management page.	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Carryover Hours check box in User Preferences, Maintenance Management page.	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Carryover Hours check box in User Preferences, Maintenance Management page.	Enabled or disabled depending on prior status.
Scheduled Hours	Enabled depending on the Completed Date field being blank, the crew has been assigned, and the crew schedule status is not *Schedule Confirmed.*	Enabled depending on the Completed Date field being blank, the crew has been assigned, and the crew schedule status is not *Schedule Confirmed.*	Disabled	Disabled	Disabled
Completed Hours	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled depending on the Completed Date field being blank and the crew has been assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled or disabled depending on prior status.

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Field/Status	Open	Awaiting Schedule	Scheduled	Work in Progress	On Hold
Completed Date	Enabled depending on crew being assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled depending on crew being assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled depending on crew being assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled depending on crew being assigned. Also depends on the selection of the Report Crew Assignment Completion check box in User Preferences, Maintenance Management page.	Enabled or disabled depending on prior status.
Crew Start Date	Enabled depending on if the Completed Date and Carryover Hours <>0, and if the crew has been assigned.	Enabled depending on if Schedule Status, Completed Date, and Carryover Hours are <> 0, and if the crew has been assigned.	Disabled	Disabled	Enabled or disabled depending on prior status.
Crew Start Time	Enabled depending on if Completed Date and Carryover Hours <> 0, and if the crew has been assigned.	Enabled depending on if Completed Date and Carryover Hours <> 0, and if the crew has been assigned.	Disabled	Disabled	Enabled or disabled depending on prior status.
Crew End Date	Enabled depending on if Completed Date and Carryover Hours <> 0, and if the crew has been assigned.	Enabled depending on if Completed Date and Carryover Hours <> 0, and if the crew has been assigned.	Disabled	Disabled	Enabled or disabled depending on prior status.

Page Used to Define Work Order Statuses

Page Name	Object Name	Navigation	Usage
Work Order Status Setup	WM_STATUS	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Work Order Status - Add a New Value.	Defines work order status values specific to an organization and matches them with PeopleSoft Maintenance Management required system-defined internal statuses.

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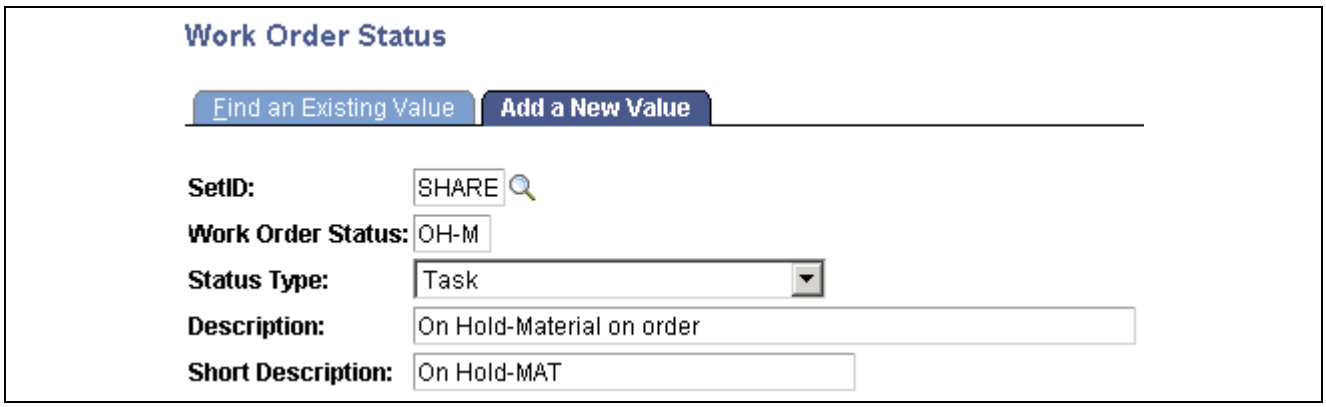
Creating Work Order Statuses

Access the Work Order Status - Add a New Value page.



Work Order Status - Add a New Value page

Status

Enter a status name that identifies a phase of your organization's typical workflow and coincides with one of the PeopleSoft Maintenance Management system-defined internal statuses listed below. For example, you might define this status as *On Hold - Material on Order* and map it to the system-defined internal status value, *On Hold.*

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Setting Up Work Order Statuses, page 162.

Status Type

Select one of these values:

- *Header*

  Selecting this value indicates that this status displays in the work order header status field and applies to the overall work order. The status that displays in the work order header status field is based on the weighting of the task statuses.

  See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

  Note. When you select this value, the Allowed Status Transitions group box does not appear because header statuses are dependent on the transitions of the work order task statuses.

- *Task*

  Selecting this value indicates that this status applies to the status that appears in each work order task.

Description and **Short Description**

Enter a long description of this status code, and then enter a short description.

Setting Up Work Order Statuses

Access the Work Order Status page.

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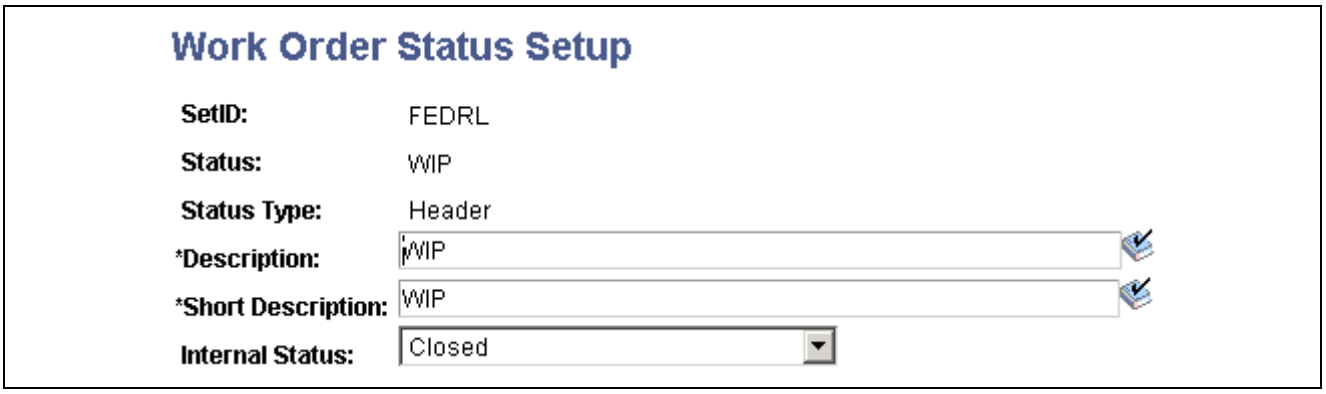

Work Order Status Setup page

You can set up all of the values in the fields describe previously that reside in the Work Order Status - Add a New Value page. However, you can set up the description, short description, and internal status values in this page.

Description and **Short Description**

Set up these fields in the Work Order Status - Add New Value page (they are required fields) and, if desired, you can modify the fields, as well as click the Dictionary button and check the spelling for each field value in this page.

Internal Status

Select one of these system-defined internal statuses to apply to this user-defined status. The system-defined statuses include:

- *Awaiting Schedule.*
- *Canceled.*
- *Closed.*
- *Complete.*
- *On Hold.*
- *Open.*
- *Scheduled.*
- *Work in Progress.*

Note. You can map one internal header status to only one user-defined header status value. You can map one internal task status value to multiple user-defined task statuses.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

Initial Status

Select this check box if this status is the initial status for the work order task.

Note. This check box only displays when you set up a work order task status and is only available for statuses being mapped to an internal status of *Open*. Furthermore, only one task status can be defined as the initial status at any given point in time.

Header Status

Select the status value that you want to display in the work order header when the weighting of the work order task statuses results in the task status currently being defined.

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For example, there are three tasks in a work order and the task statuses are On Hold - Awaiting Information (4), Scheduled (5), and Complete (6). Because *On Hold* has the highest weighted value, then work order header status value would be based on the internal task status of On Hold. However, when you set up the task status for the internal status of On Hold and name the task status On Hold – Awaiting Information, then you can select the Header Status value in this field that you want to display in the work order header's status field.

Allowed Status Transitions

The allowable status transitions display for task statuses only and are based on the system-defined status display rules.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

Status

Displays a list of allowed status transitions based on the internal status for the selected status that you are currently defining.

The internal status values that allow transitions are:

- *Open.*
- *Awaiting Schedule.*
- *On Hold.*
- *Scheduled.*
- *Complete.*
- *Work in Progress.*

Important! The Allowed Status Transitions grid does not display if the internal status is *Canceled* or *Closed.* Also, when you set up a user-defined task status with a specific internal status, the user-defined statuses that appear in the Allowed Status Transitions grid are dependent on the allowed internal status transitions that appear in the Allowable Status Transitions diagram or the allowable status transitions table.

Use as Default

Select the check box to signal, in an automated status transition, the status that will be chosen as default. Currently the only automated status transition that exists in the application is the Batch Close process. When setting transitions from a task *Complete* status, ideally one of the transitions to a closed status should be chosen as the default status.

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CHAPTER 8

Setting Up Labor and Tools Resources

This chapter presents an overview of labor and tools resource setup in Oracle's PeopleSoft Enterprise Maintenance Management and discusses how to:

- Understanding labor and tools resource setup and maintenance.
- Set up qualifications and employee data in PeopleSoft Maintenance Management.
- Generate employees as resources in PeopleSoft Maintenance Management.
- Set up shifts, schedule patterns and periods, shops, and crews.
- Maintain resources in PeopleSoft Maintenance Management.

Understanding Labor and Tools Resource Setup and Maintenance

This section discusses:

- Labor resource setup.
- Comparison of PeopleSoft FSCM and HRMS employee source database tables.
- Steps to create employee data, generate resources, and manage resources without PeopleSoft HRMS.
- Tool resources setup.
- Resource cache administration.

Labor Resources Setup

The goal of the operations manager and shop supervisor is to ensure the accurate inventorying and easy deployment of the labor resources (technicians) who are needed to complete work order assignments. Normally, the supervisor sets up the labor resources and assigns them to a shop. When a work order is created, the scheduler can assign resources to the work order task by simply selecting resources directly from the list of eligible labor resources, by using the Recommend Labor feature to search for the most qualified and available resources, or by manually searching for available labor resources. Before you set up shops and assign resources to the shops, you must set up competencies and accomplishments and associate them with employees.

You can generate labor resources by setting up employee data using one of these methods:

- Integrating with PeopleSoft HRMS.
- Integrating with 7.X HRMS or Third-Party HRMS.
- Set up employee and non-employee data in the FSCM database using PeopleSoft Maintenance Management.

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Important! You must access Set Up Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup and indicate whether you intend to use PeopleSoft HCM 8.0+, PeopleSoft HCM 8.0+ and PeopleSoft Financials Database, or PeopleSoft Financials Database for your employee source data. If you use PeopleSoft Front Office Staffing, then the PeopleSoft Financials Database option is not available for selection.

You set up accomplishments and competencies using tables that are common to PeopleSoft Resource Management, Staffing, and PeopleSoft Maintenance Management. You assign these accomplishments and competencies in qualification profiles, which you can associate when setting up a craft codes in PeopleSoft Maintenance Management, or select to specify the labor qualification requirements for a craft requirement in a work order task line of the Work Order component. You can assign one or more resources to a craft. When you assign resources to a craft, you can update the qualification profiles from the craft only if the labor resource is set up in the Financials Database using PeopleSoft Maintenance Management. For each work order task, you can specify all the crafts required to perform the task and then modify the competencies and accomplishment qualifications needed for each of the specified crafts if necessary. You can also update and review each resource's qualification profile in PeopleSoft Maintenance Management to keep the profile current.

Once the resources and the qualifications are set up, you assign the resources to a shop. You must associate the resources with a shift in the shop. You can also associate resources with crews and assign one or more crews to a shop. You can assign crew members to more than one shop as long as you divide their capacity percentage between the shops. Before you can use the system to determine capacity for a crew based on specific periods, you must set up the schedule patterns, generate the schedule periods from the pattern, and specify which schedule pattern the crew will be using on the Crew Definition Component. You also can set up reasons for rescheduling a crew.

After this data is set up, you must run the Cache Administration process (Set Up Financials/ Supply Chain, Common Definitions, Resource Search, Cache Administration) to refresh the current eligible resources cache, the resource schedule cache, and the search indexes (for example, Verity Search Indexes). We recommend that you run this process nightly to keep the cache up to date. You must update the cache if you want the system to recommend labor resources based on their qualifications and availability, and if you want to enable users to see the availability score for each labor resource in relation to each work order task. The availability cache is updated automatically when assignments are created and canceled. Once you establish your labor resources, you can then create work orders and assign these resources to the work order tasks in PeopleSoft Maintenance Management by:

- Directly assigning the labor resource to a task.
- Selecting of the Recommend Resource button, which runs the Resource Matching process that recommends qualified and available resources for the task.

  This Matching process matches eligible resources to resource demand as specified in the work order task. It objectively assesses resource availability and qualification level and presents resource assignment possibilities at the work order task level.
- Manually searching for available resources that possess the required craft and are available for the work order task.
- Assigning labor resources from crews, as well as individual resources, using the Labor Assignment Workbench.

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Important! If you use PeopleSoft Resource Management and have set up your employee data in PeopleSoft Resource Management, then you do not have to set up the employee data again in PeopleSoft Maintenance Management because the employee data is set up in the same tables for both PeopleSoft Resource Management and PeopleSoft Maintenance Management. However, after the employee data is set up, you must create the employees as resources using the Create Resources or Create Resource Program components in PeopleSoft Maintenance Management before you can schedule the labor resources to a work order. The system marks them as PeopleSoft Maintenance Management resources in the same table PeopleSoft Resource Management uses. Once you create the employees as resources in PeopleSoft Maintenance Management, then you must perform all other activities such as managing a resource profile using the Labor Administration components in PeopleSoft Maintenance Management.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," PeopleSoft HRMS Setup Considerations, page 66.

See Chapter 18, "Scheduling a Work Order," Understanding Resource Scheduling, page 443.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management with PeopleSoft HRMS," Understanding PeopleSoft Resource Management and PeopleSoft HRMS.

Comparison of PeopleSoft FSCM and HRMS Employee Source Database Tables in Resource Profile

The PeopleSoft Resource Management PeopleBook identifies the tables used in the PeopleSoft Financial Database versus the PeopleSoft HRMS Database to derive data for the pages in the Manage Profiles component. All of this information also applies to PeopleSoft Maintenance Management except for:

- The row describing Preferences, which does not apply to PeopleSoft Maintenance Management.
- The row describing Supply Categories, which does not apply to PeopleSoft Maintenance Management.
- Additional pages in the Resource Profile specifically for PeopleSoft Maintenance Management, which include:
  - A Craft page.
  - A Shop page.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Maintaining Resource Profiles," Understanding Resource Profile Maintenance and Chapter 18, "Scheduling a Work Order," Labor and Tool Resource Matching, page 446.

This describes the use of the Resource Profile Craft and Shop pages.

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Craft Lists the crafts associated with this resource.	This is unique to PeopleSoft Maintenance Management. On this page, you can review all of the crafts that apply to the labor resource, and manually add one or more crafts to the labor resource's profile. This is just one way to specify the crafts belonging to a given resource. Another way is to add crafts to a labor resource is through the Assigning Resources to a Craft component , which enables you to assign one or more resources to a given craft.	Not applicable
Shop Lists the shops to which an employee is assigned.	This is unique to PeopleSoft Maintenance Management. On this page, you can assign one or more shops to the labor resource with a specific weekly Shift. Manage Resource Profile validates shifts to prevent overlapping.	Not applicable

Important! PeopleSoft Maintenance Management does not use pool, regions, or industry in the resource profile.

Steps to Create Employee Data, Generate Resources, and Manage Resources Without PeopleSoft HRMS

You can set up labor resources based on integrating with PeopleSoft HRMS and using the established employee data and competencies from PeopleSoft HRMS. You may also be able to use the data from a third-party product if you use PeopleSoft HRMS 7. x or earlier. However, if you do not use PeopleSoft HRMS, you can set up accomplishments and competencies in the Financials/Supply Chain database for employees that you define in PeopleSoft Maintenance Management.

Follow these steps to establish accomplishments and competencies for use in with resources in PeopleSoft Maintenance Management:

1. Set up fundamental resource and competency data in Set Up Financials/Supply Chain, Common Definitions, Resource Data, which includes:
   - Resources setup.
   - Honors and awards.
   - Memberships.
   - Languages.
   - Licenses and certifications.
   - Degrees.
   - Majors.
   - Schools.
   - Competency types.
   - Competencies.

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- Competency tree.
- Job codes.
- Holidays.

Note. You also can set up a competency tree using Tree Manager.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Using the Competency Tree to Organize Competencies.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Resources.

2. Set up relevant qualification and employee data in PeopleSoft Maintenance Management including:
   - Task categories.
   - Qualification profiles.
   - Crafts.
   - Employee data.
3. Create resources from employees using one of these methods:
   - Create resources (individual employees).
   - Create resources using the batch (RS_CW_AE) process.
4. Set up key features in PeopleSoft Maintenance Management used to manage and assign resources to a work order and work order task, which include:
   - Defining shifts.
   - Setting up shops.
   - Setting up crews.
   - Setting up schedule patterns and generating schedule periods based on a schedule pattern.
   - Setting up crew rescheduling reason codes.
5. Manage resources by:
   - Creating a resource group.
   - Assigning resources to a craft.
   - Maintaining employee eligibility.
   - Managing employee profiles.

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Tool Resources Setup

Tools are assets that are identified as tools in PeopleSoft Asset Management's asset repository by selecting the Asset Management, Asset Transactions, Owned Assets, Basic Add component. You can assign the asset type, subtype, manufacturer ID, and model of a tool along with the shop in which the tool is located or stored at and the preferred maintenance crew that can maintain the tools. You can assign a tool for use in a work order task in the work order component and can track the actual usage and cost of the tool in the Technician Workbench in PeopleSoft Maintenance Management. You can set up tool rates based on the asset type and subtype in the shop's Tool Rates page. These rates are the default rate values that display in the Tool Requirements and Tool Schedules grids of the work order task. If the rates are not set up in the shop, the default values are derived from the asset subtype, which is set up in PeopleSoft Asset Management. When you search for a tool, the availability is based on the operating hours of the shop.

When you use the matching engine to recommend the qualified and available tools to use for a work order task, the availability of tools is determined by the shop's operating hours. You can set up resource groups of tools for more than one shop. For example, you can set up a resource group for SHOP A to SHOP C, which includes all resources belong to SHOP A, SHOP B, and SHOP C. You can use a resource group to restrict the search for tools available to use in the performance of a work order task to the shops specified within the resource group. If you do not specify a resource group, the system searches through all the assets marked as tools based on the asset characteristics that you specify when you schedule tools in the work order task line.

Important! The accuracy of the recommendation provided by the Match Engine for labor and tools depends on the status of the cache records. You should refresh the cache regularly.

Resource Cache Administration

You run the Cache Administration Application Engine (RS_CACHE_AD) process to manage various cache records in order to enhance system performance. PeopleSoft Maintenance Management uses only three cache records: Resource Eligibility, Resource Schedule, and Verity Search Index. You run this process periodically to purge unnecessary data from the system and to update cache tables that are used by various PeopleSoft Maintenance Management activities which include:

- Incorporating a Verity search index for searching.
- Keeping the available dates and times in the resource schedules up to date.
- Keeping the resource eligibility up to date.

The matching engine uses the current Verity search index, resource eligibility, and the resource schedules cache to determine the qualification and availability fit scores that the matching engine uses to determine whether a resource is qualified and available to perform a specific work order task.

You should run the resource eligibility cache every time you run the Create Resources process.

Important! It is important to keep the cache records current in order to produce accurate results when you run processes such as the Match Engine, the resource availability checking routine, and resource assignment creation. To keep the cache current at any point in time, we recommend that you should schedule this process to run nightly.

PeopleSoft Maintenance Management uses the resource schedules and resource eligibility to determine the availability of a resource for assignment in a work order task.

Note. You should also refresh the cache if you add resources or modify the shifts or shops associated with resources.

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See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , “Enabling Resource Matching and Cache Processes”.

Setting Up Qualifications and Employee Data in PeopleSoft Maintenance Management

To set up task categories, crafts, employees, and qualification profiles, use the:

- Setup Task Categories (RS_TASK_TYPE) component.
- Define Crafts (RS_SETUP_CRAFT) component.
- Qualification Profiles (RS_RESRC_TEMPLT) component.
- Manage Employee Data (RS_CM_PERSONAL) component.

This section provides an overview of qualification and employee data in PeopleSoft Maintenance Management and discusses how to:

- Set up task categories.
- Add and maintain qualification profiles.
- Add competencies.
- Define crafts.
- Add employee personal data.
- Add employee job data.
- Add employee visa and work permit data.
- Add employee citizenship and passport data.

Important! Before you set up this data, you must set up the Resource Setup component, as well as specific competency components located in Set Up Financials/Supply Chain, Common Definitions, Resources Data. The links to access this information are located in the Pages Used to Define Qualifications and Set Up Employee Data in PeopleSoft Maintenance Management section later in this section.

Understanding Qualification and Employee Data in PeopleSoft Maintenance Management

This section discusses:

- Task categories.
- Accomplishments and competencies.
- Qualification profiles.
- Craft definitions.
- Employee data.

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Task Categories

In PeopleSoft Maintenance Management, a task is the equivalent of a schedule entry, such as an appointment, holiday, or meeting. When adding a new schedule entry, you must specify a task category on the Task Details page of a resource's monthly calendar. For example, if you select a date on the monthly calendar and select the Task Category that is set up for Appointment, then the calendar is updated with the appointment. Task categories identify specific periods of time when a resource is not available in the resource schedule. When assigning a resource to a work order task, the system looks at the calendar and takes these periods when the resource is not available into consideration when determining the availability of a resource.

Accomplishments and Competencies

An accomplishment is an objective, measurable achievement. The accomplishment setup tables identify the accomplishments that resources can include in their resource profiles or that users can list as requirements for the resources that they request for an assignment. The Resource Matching Engine compares the resource's accomplishments with the accomplishments requested for an assignment. Accomplishments are set up in the Set Up Financials/Supply Chain, Common Definitions, Resources Data component and include:

- Honors and awards.
- Memberships.
- Languages.
- Licenses and certifications.
- Degrees.
- Majors.
- Schools.

Specific accomplishments for education, licenses and certifications, memberships, and languages can be included in Resource Matching to find the best fit between resources and resource requests. You can include accomplishments in the remaining categories (honors and awards) in the resource profiles for information only.

Competencies encompass skills, abilities, knowledge, or behavior, such as experience with repairing equipment, knowledge of special manufacturing processes, or a background in plumbing. Unlike accomplishments, competencies are measured or evaluated using a rating model that you define. For example, if the rating model defines three possible values, each will add 33 percent to the score. If the rating model defines five values, each value will add 20 percent to the score.

Set up resource competency data in Set Up Financials/Supply Chain, Common Definitions, Resource Data to include:

- Resources setup.

  Set up this option to define default work days and calendar options, indicate whether to allow non-employees to be established as resources, and whether you want to obtain employee data and competencies from either the PeopleSoft HCM 8.0+ database, the PeopleSoft HCM 8.0+ and FMS databases, or only the FMS database.

  - Competency types.
  - Competencies.
  - Competency tree.
  - Job codes.
  - Holidays.

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Note. You also can set up a competency tree using Tree Manager.

- Competency types.
- Competencies.
- Competency tree.
- Job codes.
- Holidays.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Organizing Competencies Using the Competency Tree.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Understanding PeopleSoft Resource Management Without PeopleSoft HRMS.

Qualification Profiles

You can add or update qualification profiles in PeopleSoft Maintenance Management. A qualification profile is a template of a type of resource, usually a craft in PeopleSoft Maintenance Management. The profile consists of competencies and accomplishments that describe the resource. When you create a work order task and select the craft, the qualifications from the qualification profile associated with the craft are copied to the task's requirements.

Note. You cannot copy a qualification profile into a resource's profile (PeopleSoft Maintenance Management, Labor Administration, Manage Profile). When a craft is added to a resource's profile, the qualifications (competencies and accomplishments) associated with the qualification profile set up for that craft are not copied into the resource's profile for employees or non-employees created through the Peoplesoft HRMS system. However, for employees or non-employees created through FSCM PeopleSoft Maintenance Management, you can copy the qualification associated with the qualification profile set up for that craft.

Craft Definitions

Define crafts to identify the type of labor resource. Maintenance planners and managers normally plan their business needs by craft, whereas shop managers and schedulers plan their needs identifying labor resources. For example, a facilities manager or planner would examine historic trends and determine that in the summer months the organization is likely to need thirty resources who specialize in the craft Landscaper in May of each year to perform the routine spring cleaning maintenance at corporate headquarters. However, at the shop level, the gardening crew supervisor or scheduler would identify specific gardener resources to perform the work.

Each crew member is associated with a craft. When a resource is added to a crew, the primary craft of the resource, which is identified in the resource's profile, is the default value. However, users can change this resource's craft in the crew definition.

You can also assign resources to a craft for a specific supervisor. If you assign a resource to a craft, the craft displays in the resource's profile in the Craft page.

Employee Data

You can add visa, work permit, citizenship, and passport data to an employee's existing data or you can add a new employee. If you do not use an HRMS database as the source for employee or non-employee data, you can access the PeopleSoft Maintenance Management, Labor Administration, Manage Employee Data component and add both employee and non-employee data. Once you add these employees, you can generate them as resources and assign them to perform work order and work order task activities.

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If you plan to set up your employee data in PeopleSoft Maintenance Management, when you set up the Common Installation Options page in the Resource Setup component, you must select the PeopleSoft Financials Databases option as the source for employee and non-employee data. This disables the enterprise integration points (EIPs) between PeopleSoft HRMS and PeopleSoft Maintenance Management tables. It also enables the processing rules for PeopleSoft Maintenance Management to serve as the employee data source.

Note. If you use PeopleSoft 8 HRMS or higher, take advantage of the built-in integration with PeopleSoft Maintenance Management to manage resources and resource competencies. PeopleSoft Maintenance Management employs EIPs to request and send data between the PeopleSoft Financials and Supply Chain Management (FSCM) database, where PeopleSoft Maintenance Management information resides, and the PeopleSoft HRMS database, where employee and competency information resides.

Pages Used to Set Up Qualifications and Employee Data in Maintenance

Page Name	Object Name	Navigation	Usage
Common Installation Options	INSTALLATION_RESRC	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup	Set up generic resource data, which includes identifying default work days, calendar options, the employee data source, and whether to notify the employee's manager when competencies and qualifications are changes.
Competency	RS_CM_COMPTNCY_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Competencies	Define competencies to apply to crafts and resources in the qualification profile.
Load Holidays	RUN_RS_HOLIDAY	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Load Holidays	Load the holidays into employee's schedules.
Competency Type	RS_CM_TYPE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Competency Types	Define the various types of skills employees may need in your organization.
Degree	RS_CM_DEGREE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Degrees	Define various types of degrees that may be needed for employees in your organization to perform certain tasks.
Holiday Schedule	RS_CM_HOLIDAY_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Holidays	Set up the organization holidays, which are loaded into employee's schedules using the Load Holiday component.
Honor/Award	RS_CM_AWARD_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Honors/Awards	Define the various honors and awards that employees may have attained.

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Page Name	Object Name	Navigation	Usage
Job Code Definition	RS_CM_JOBCODE_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Job Codes	See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Work Definitions.
Language	RS_CM_LANG_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Languages	Add the languages that employees in which an employee may need to be competent.
License/Certificate	RS_CM_LIC_CERT_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Licenses/Certifications	Define any licenses and certificates that an employee may acquire that might be pertinent to work performed in your organization.
Major	RS_CM_MAJOR_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Majors	Define a list of college majors that are desirable for employees in your organization to have to perform certain tasks.
Membership	RS_CM_MEMBR_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Memberships	Define any memberships to organizations that are desirable for employee's in your organization to belong to in order to perform certain tasks.
School	RS_CM_SCHOOL_TBL	Set Up Financials/Supply Chain, Common Definitions, Resources Data, Schools	Create a list of schools that employee's may have attended.
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Use to add and update a competency tree.
Task Categories	RS_TASK_TYPE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Setup Task Categories	Distinguish between different types of tasks on a resource's schedule, for both informational purposes and in the Resource Matching Availability factor fit score calculation.
Define Crafts	RS_CFTSETUP_PG	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Crafts	Describes each type of craft and any qualifications associated with the craft to enable users to associate it with resources identified in the shop and in the work order.

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Page Name	Object Name	Navigation	Usage
Qualification Profile	RS_RESRC_TEMPLT	Maintenance Management, Labor Administration, Qualification Profiles	Define generic competencies and qualifications in a template that may be accessed at the work order task level or may be associated with a craft which is identified at the work order task level.
Competencies	RS_RESRC_TMPL_COMP	Click the Add Competency button on the Qualification Profile page.	Add a competency from the competency tree to the grid on the Qualification Profile page.
Personal Data	RS_CM_PERSONL_DATA	Maintenance Management, Labor Administration, Manage Employee Data	Add and update an employee's personal data such as address and phone number.
Employee Job	RS_CM_EMPL_JOB	Maintenance Management, Resource Maintenance, Manage Employee Data, Employee Job tab	Add and update an employee's job-related data such as supervisor and work phone.
Visa/Work Permit	RM_CM_VISA_PRMT	Select the Visa/Work Permit tab	Add and update any work permit and visa information for an employee.
Citizenship/Passport	RS_CM_CITI_PASS	Select the Citizenship/Passport tab	Add and update the citizenship and passport information for the employee.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Resources

PeopleSoft Enterprise Resource Management 9.0 PeopleBook , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Establishing Application Setup Tables for Work Definitions

Setting Up Task Categories

Access the Task Categories page.

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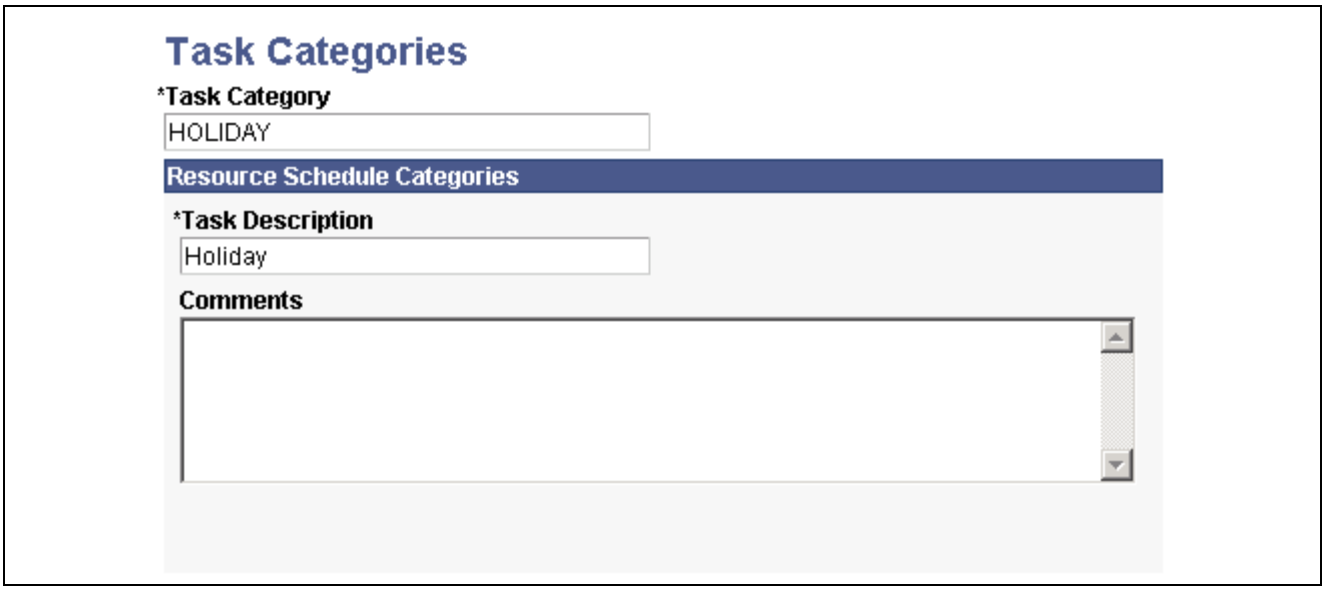

Task Categories page

Task Category Enter a category to apply to a resource's schedule such as Paid Time Off (PTO), Company Holiday, Corporate Event, Meeting, Training, and Appointment. You can add these to a resource's monthly calendar.

Important! You do not set up work order tasks here. They are set up and assigned when you create a work order.

Task Description and **Comments** Enter a description of this category and comments relevant to this task.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Enabling Resource Schedules," Understanding Resource Schedules.

Adding and Maintaining Qualification Profiles

Access the Qualification Profile page.

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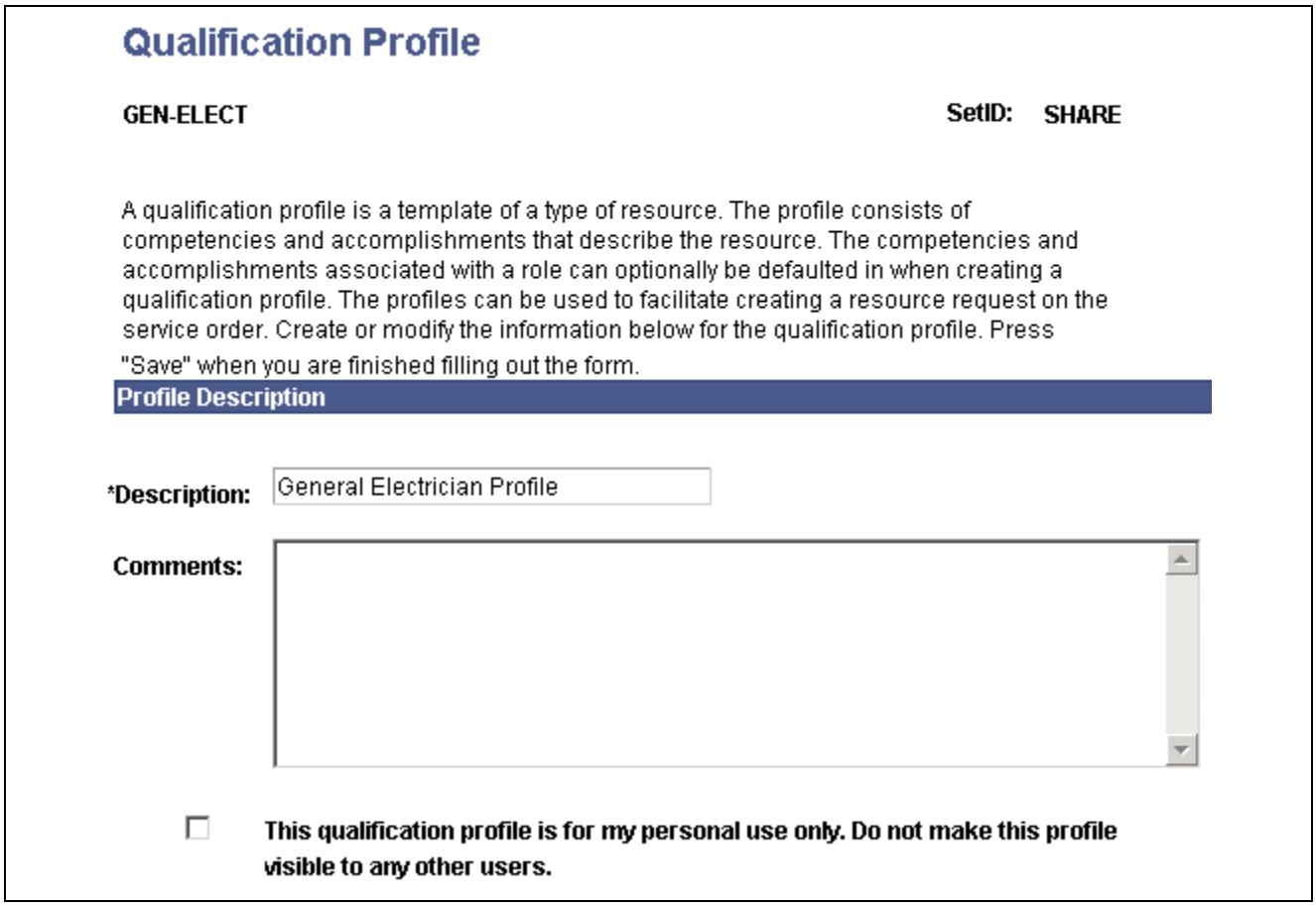

Qualification Profile (1 of 3) page

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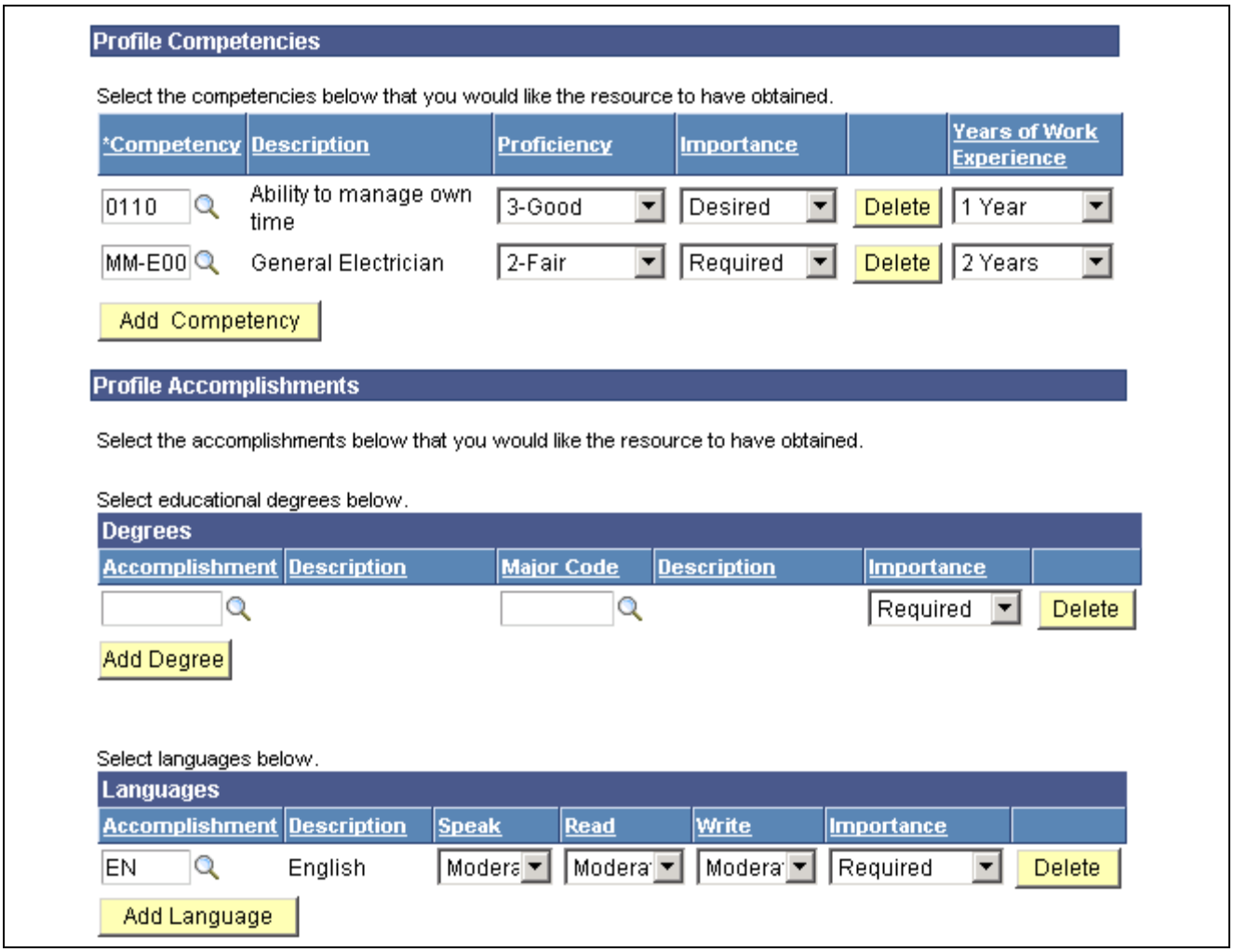
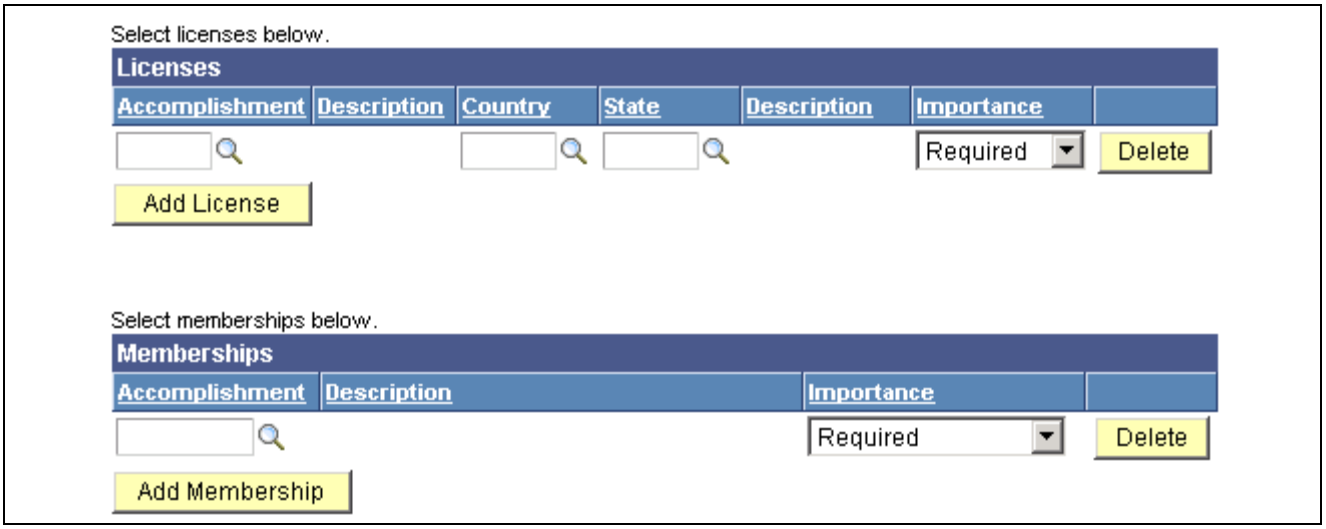


Qualification Profile (2 of 3) page



Qualification Profile (3 of 3) page

Enter a name for the qualification profile, such as a craft name like MECHANIC, ELECTRICIAN, or PLUMBER. Enter a description and any other comments relevant to the profile you are creating.

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This qualification profile is for my personal use only. Do not make this profile visible to any other users. Select the check box if you want to use this profile for personal use and not allow anyone else to see it.

Profile Competencies

This grid enables you to select and add competencies to the profile. You can change the number of years of work experience required for each competency.

Degrees

Click the Add button to add a row to the Degrees grid. You can select and modify values for the Accomplishment, Major Code, and Importance fields.

Languages

Click the Add button to add a row to the Languages grid. You can select and modify values for the Accomplishment, Speak, Read, Write, and Importance fields.

Licenses

Click the Add button to add a row to the Licenses grid. You can select and modify values for the Accomplishment, Country, State, Country, and Importance fields.

Memberships

Click the Add button to add a row to the Memberships grid. You can select and modify values for the Accomplishment and Importance fields.

See Also

Chapter 8, “Setting Up Labor and Tools Resources,” Adding Competencies, page 180

PeopleSoft Enterprise Resource Management 9.0 PeopleBook , “Setting Up PeopleSoft Resource Management Without an Integrated HRMS,” Establishing Application Setup Tables for Qualifications

Adding Competencies

Click the Add Competency button to access the Competencies page.

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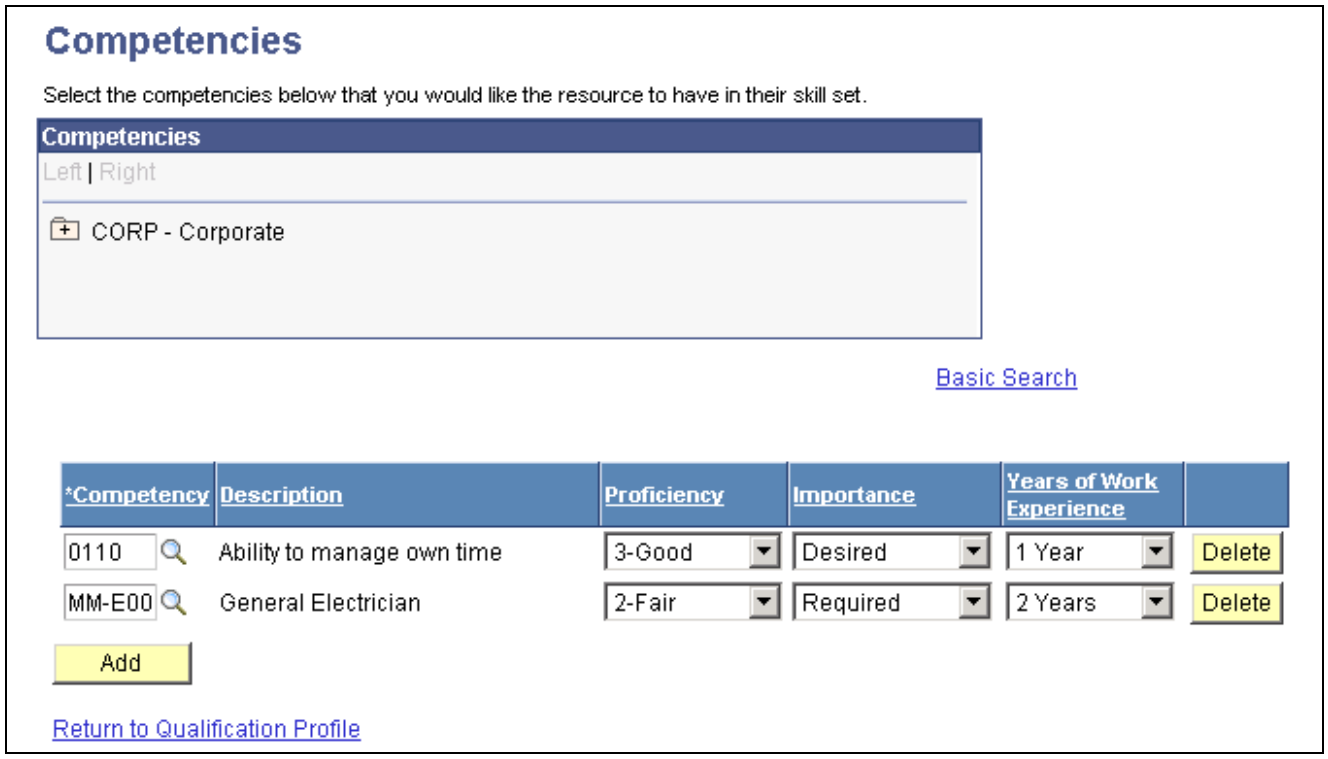

Competencies page

Competencies Click the competency tree and click the competency that you want to copy into the new row that you just added or click the Basic Search button to display the Competency Description field.

Competency Description Enter a description of a competency such as *listen* and click the Search button. The competency, *Ability to listen and respond* appears in the Competency grid. To display a list of all the competencies based on the competency type enter a wildcard (%) or just click the Search button. A list of competencies defined for the competency type displays.

Select Select the check box next to each of the competencies that you want to add and click the Select button. The selected competencies are added as rows in the Competency grid. You can modify the Proficiency, Importance, and Years of Work Experience for each competency in the grid.

Add Click this button to add a blank row to the competency grid. When you search for the new competency, a list of all competencies set up in the system appears.

Return to Qualification Profile Click this link to return to the Qualification Profile. The added competencies display in the grid for this profile.

Defining Crafts

Access the Define Crafts page.

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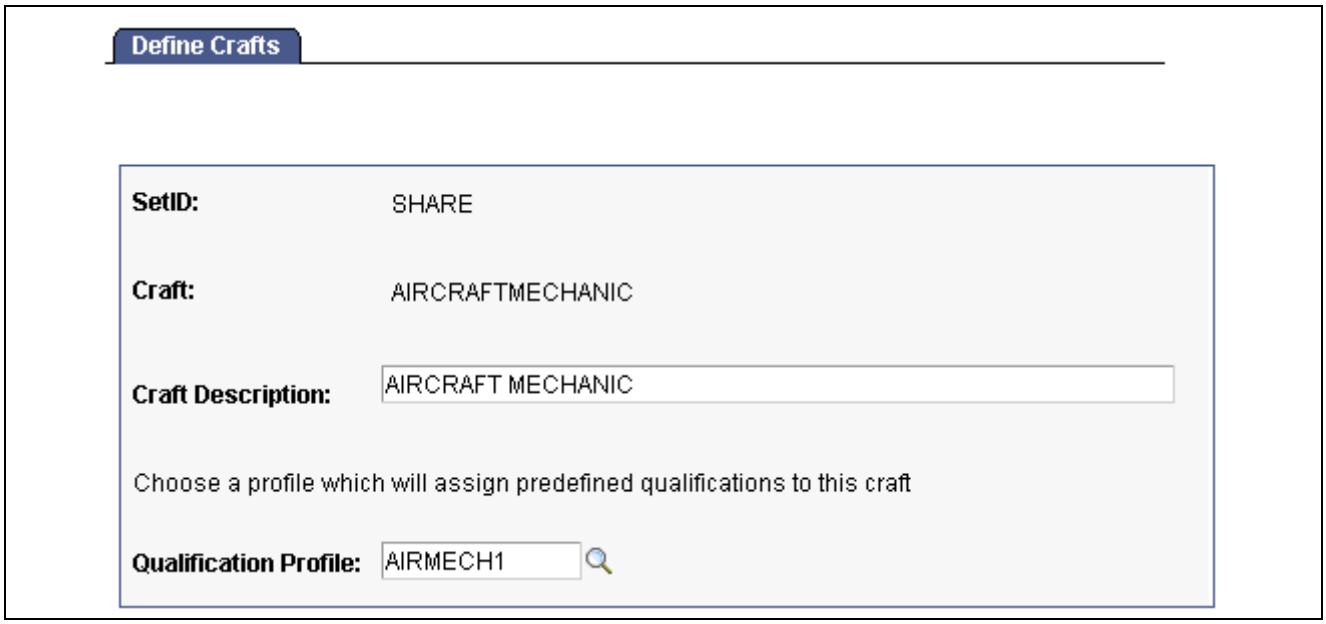

Define Crafts page

Craft Enter type of craft to use to complete work orders such as electricians, mechanics, plumbers.

Qualification Profile Select the qualification profile that describes qualifications that an employee needs to perform this craft.

Note. When a craft is added to a work order task, then the competencies, accomplishments, and qualifications associated with the qualification profile selected here for the craft are copied to the work order task labor qualification requirements for that task.

Adding Employee Personal Data

Access the Personal Data page.

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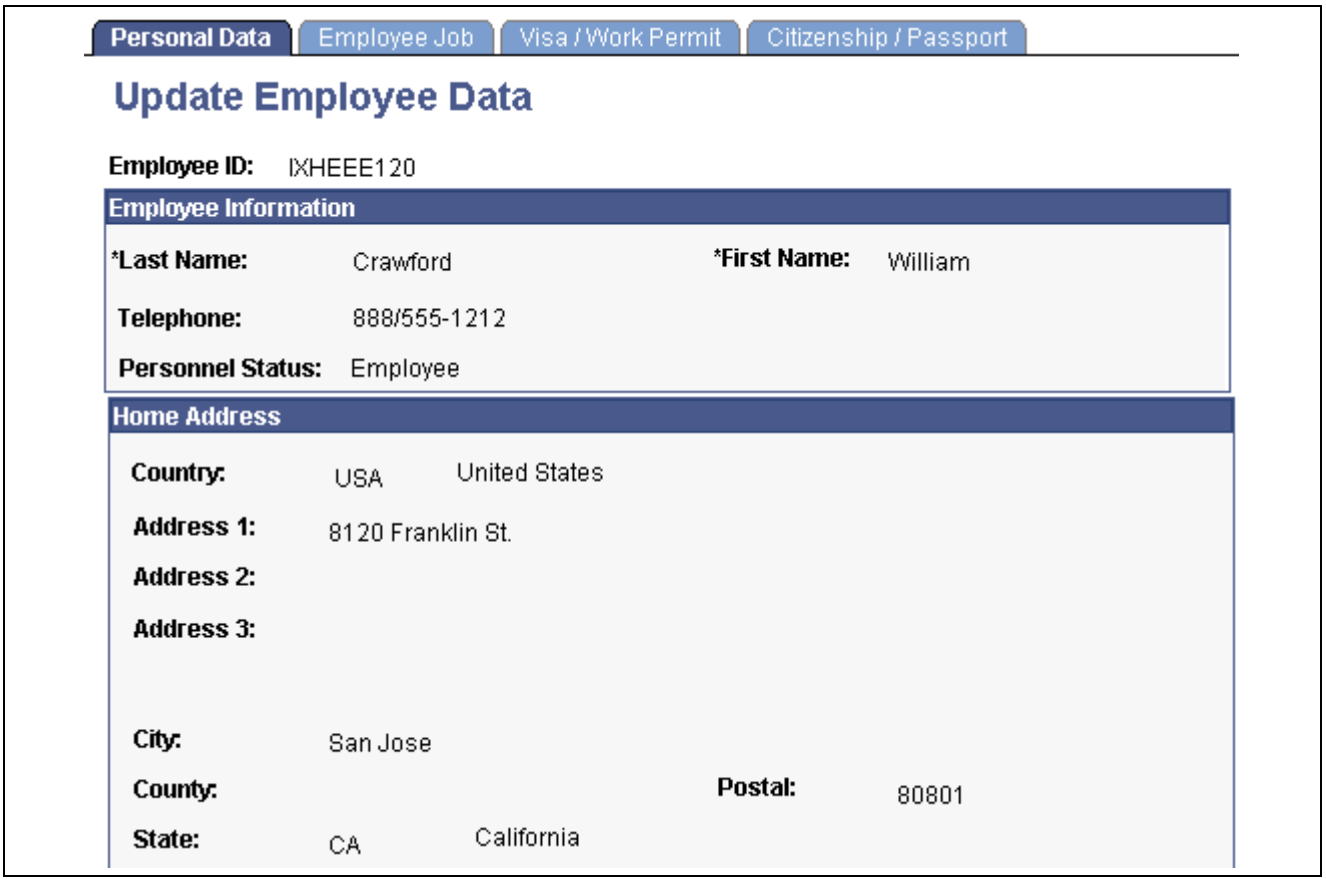

Personal Data page

Enter the employee's name, telephone number, and address information.

Personnel Status Select whether this individual is one of the following:

- An employee based on your organization's definition of an employee.
- A non-employee such as contractor or consultant.

Adding Employee Job Data

Access the Employee Job page.

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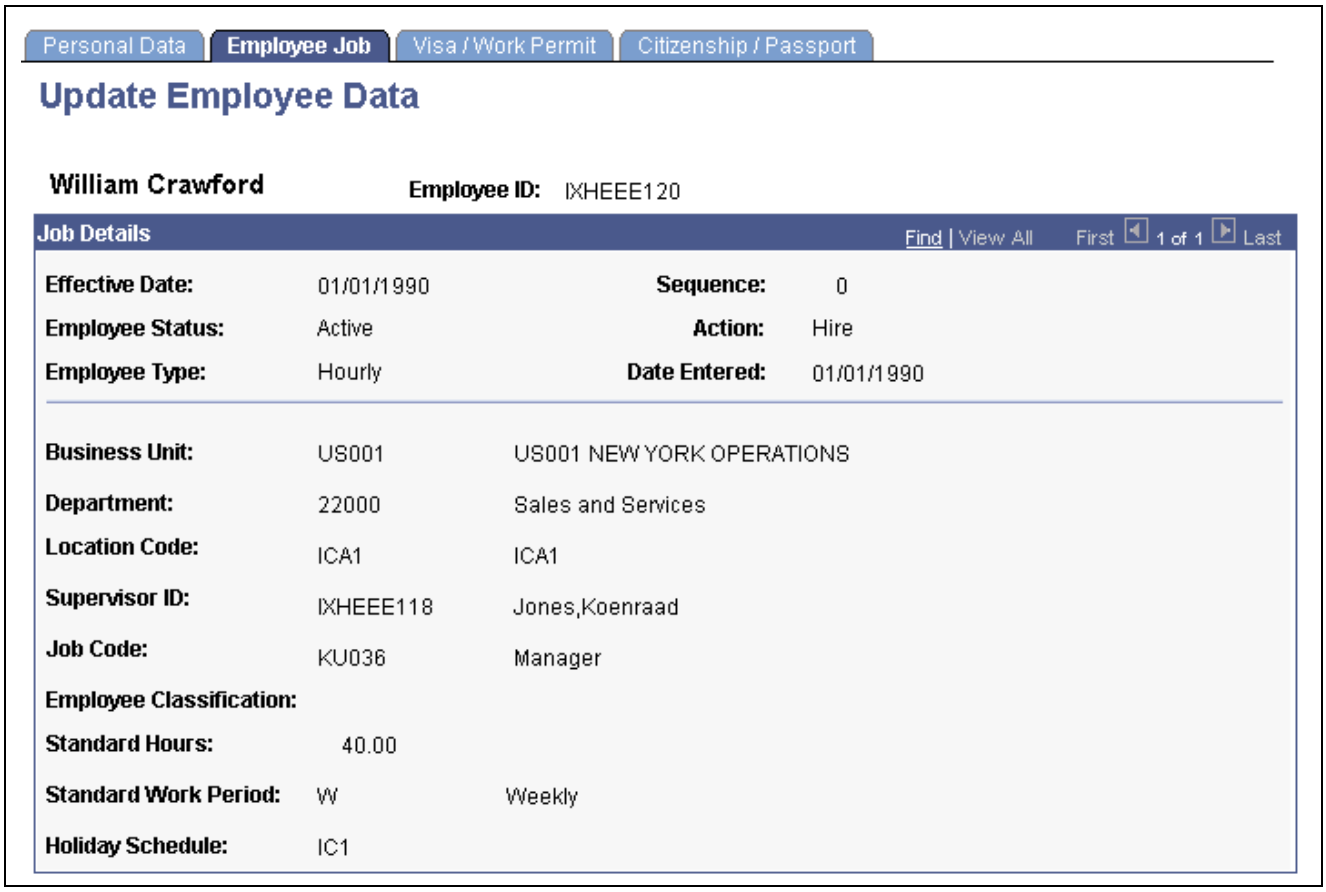

Employee Job page

Effective Date Select the date that this data becomes effective in the system. You can add more than one job data record consisting of different data selected as job details for this employee. Effective Date, Employee Status, Business Unit, Department, Supervisor ID, Job Code, Standard Hours, and Standard Work Period are required fields.

The asterisk (*) by a field means that it is required and that you must select or enter a value in the field.

Important! You must refresh the Eligible Resource Cache table (RS_ELGBL_WRKR) when routine changes are made to a resource's job-related information.

See Also

PeopleSoft Enterprise Resource Management 9.0 PeopleBook , "Setting Up PeopleSoft Resource Management Without an Integrated HRMS," Understanding Application Setup and Employee Data Tables

Adding Employee Visa and Work Permit Data

Access the Visa/Work Permit page.

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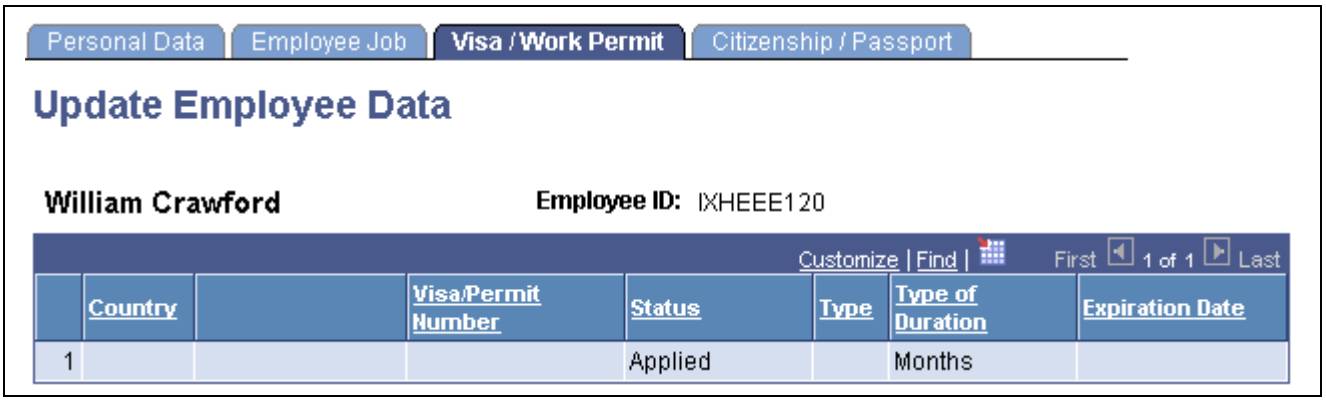

Visa/Work Permit page

Add as many rows as necessary of visa and work permit information for this employee.

Adding Employee Citizenship and Passport Data

Access the Citizenship/Passport page.

Citizenship/Passport page

Add as many rows as necessary of citizenship and passport information for this employee.

Generating Employees as Resources in PeopleSoft Maintenance Management

This section provides an overview of resource generation and discusses how to:

- Create individual resources.
- Change the job for a resource.
- Create resources using batch processing.
- Establish resources.

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Understanding Resource Generation

Once employee source data is either imported from PeopleSoft HRMS or set up in PeopleSoft Maintenance Management, you generate selected employees as resources. The term *resource* describes the employees and non-employees who can be assigned to work orders and work order tasks in PeopleSoft Maintenance Management. When you establish an employee or non-employee as a resource, PeopleSoft Maintenance Management automatically populates the resource's schedule with holidays. You can assign resources to a craft, change a resource's eligibility status, and update a resource's profile. For example, when you assign resources directly to a shop, add more crafts, and so on, you can then assign these resources to specific work order tasks.

To establish and maintain employees and non-employees as resources, use:

- For individual resources, the Create Resources (RS_WRKR_CREATE component) .
- For resource batches, the Create Resources Program (RS_CW_AE) component .

New resources are established as eligible for assignment, which means that they are included in Resource Matching and can be assigned to work order tasks. Use the Create Resources component, and click the Change Job button to assign a resource to a different job.

Important! After you execute the process to convert the list of employees into resources, run the Cache Administration Application Engine process (RS_CACHE_ADMIN), which calls the Refresh Eligible Worker, Refresh Availability Cache, and Create/Update Verity Index processes to update the Cache tables that are used for resource matching.

See Also

PeopleSoft Enterprise Resource Management 9.0 PeopleBook , "Establishing Resources"

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Pages Used to Generate Resources from Employee Data

Page Name	Object Name	Navigation	Usage
Create Resources	RS_WRKR_CREATE	Maintenance Management, Labor Administration, Create Resources	Add an employee as a resource.
Establish Employee as Resource	RS_WRKR_CREAT_CHNG	Maintenance Management, Labor Administration, Create Resources Click the Change Job link.	Select one job from a list of jobs to associate with this employee resource if you allow multiple jobs in HRMS.
Send Notification	PT_WF_NOTIFY	Click the Notify button on the Create Resources page or Establish Employee as Resource page.	Notify concerned parties that you created this employee as a resource for a specific job.
Lookup Address	PT_WF_NOTFY_LOOKUP	Click the Lookup Recipient link on the Send Notification page.	Search for and add the recipients of the notification.
Create Resources Program	RS_CW	Creates individual employees as resources.	Run a batch process to establish large numbers of employees as resources. See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , “Establishing Resources”.
Create Resources Program - Resources to be Established	RS_CW_2	Click the Generate button on the Create Resources Program page.	Generates a list of employees from which you can select to create as resources.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Establish Resources button on the Create Resources Program page.	Confirm submission of employees as resources is successful.

Creating Individual Resources

Access the Create Resources page.

Add an Employee as a Resource

Access the Add Employee as Resource page and select an employee ID that you want to add as a resource.

Create Resources

Verify the resource’s information. If the information is correct, click the Save button. If the information is incorrect, click the Change Job button.

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Changing the Job for a Resource

Access the Establish Employee as Resource page. If more than one job is listed, then click the Select button next to the job for which you want to create this employee as a resource. Upon selection the Create Resources page redisplays with the job you selected.

Select Click this button for the Department, Location, and Job with which to associate this resource. You perform this activity when an employee is eligible for assignment to more than one job.

Notify Click this button either on the Establish Employee as a Resource page or the Create Resources page to notify the managers and the employee (if desired) that you created them as a resource for the selected job.

This button only appears if you select the Email Notification to Manager check box in the Common Installation Options page if the data source is either Financials or Financials and PeopleSoft HCM. It does not appear if the data source is only PeopleSoft HCM.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Resources.

Creating Resources Using Batch Processing

Access the Create Resources Program page.

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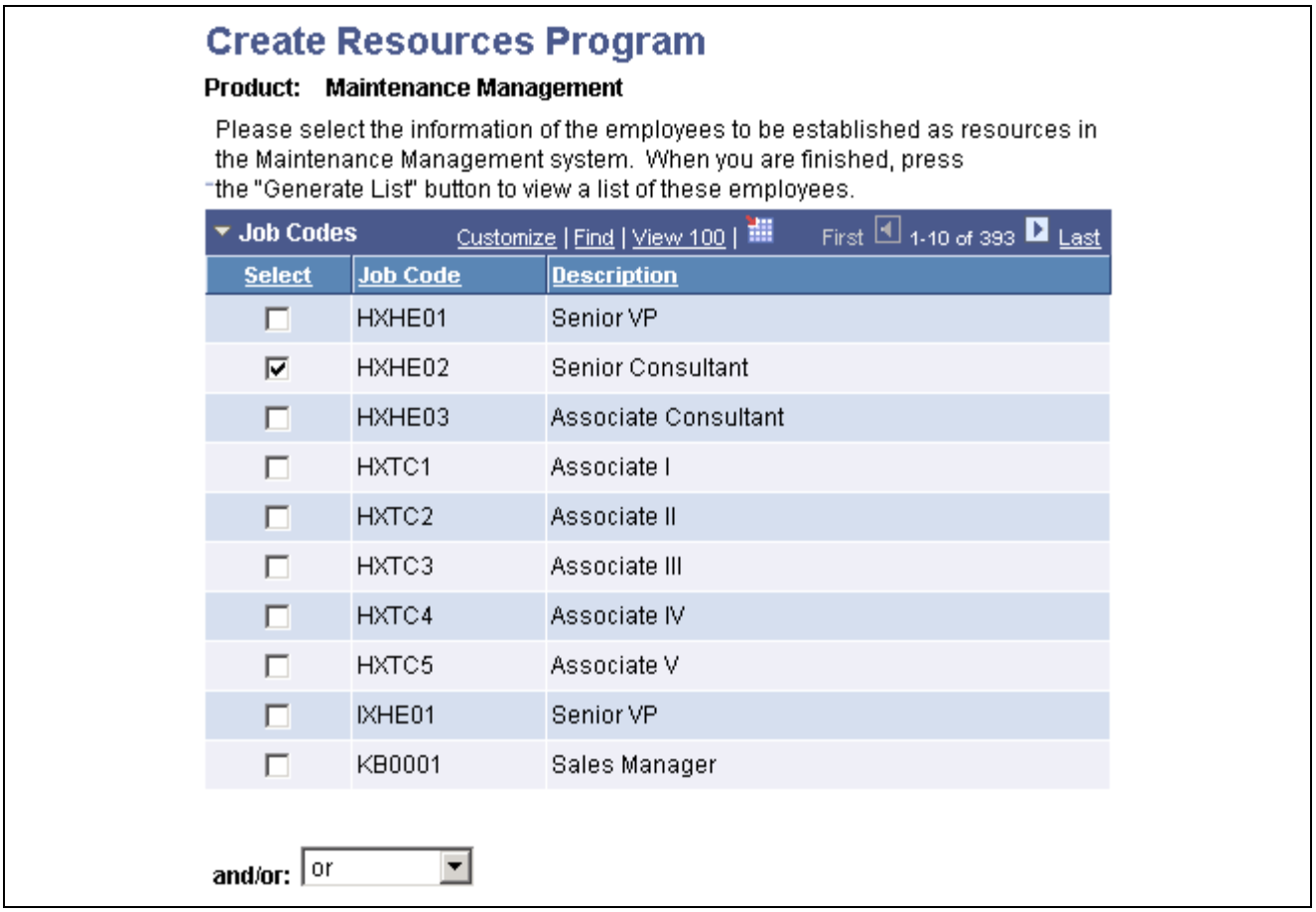
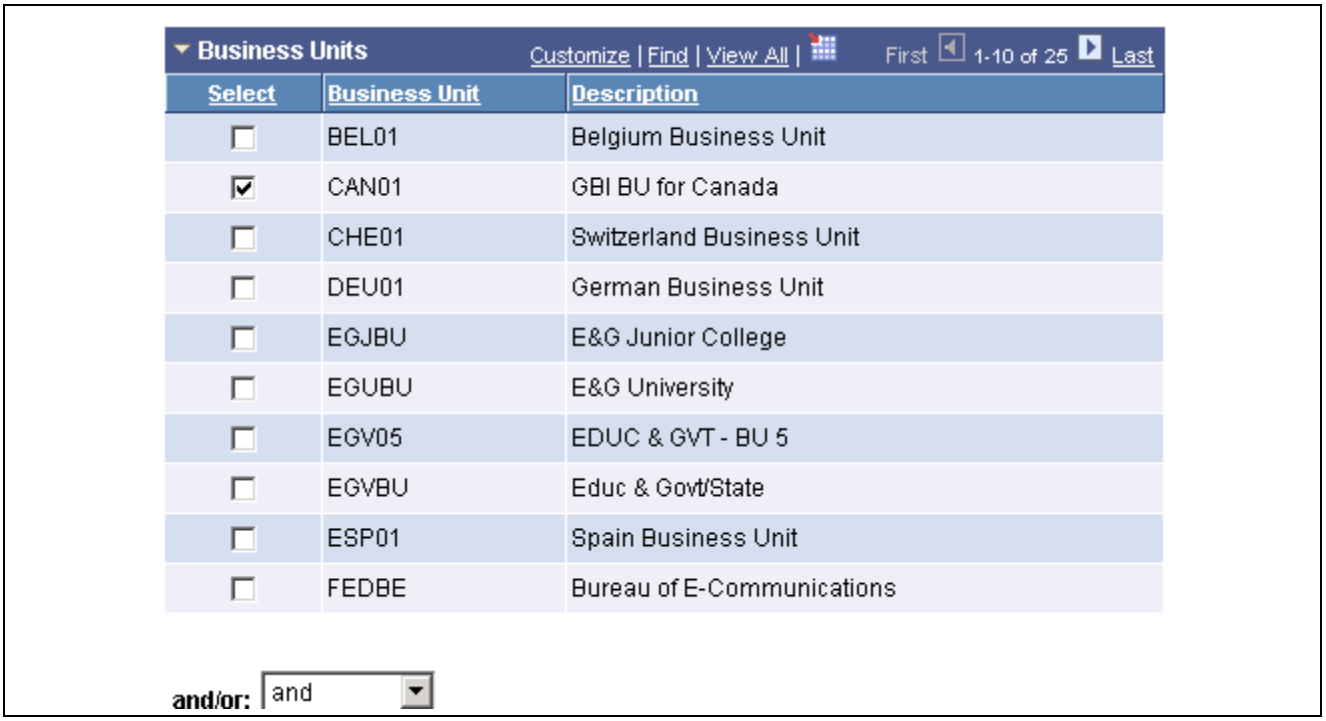


Create Resources Program (1 of 5) page



Create Resources Program (2 of 5) page

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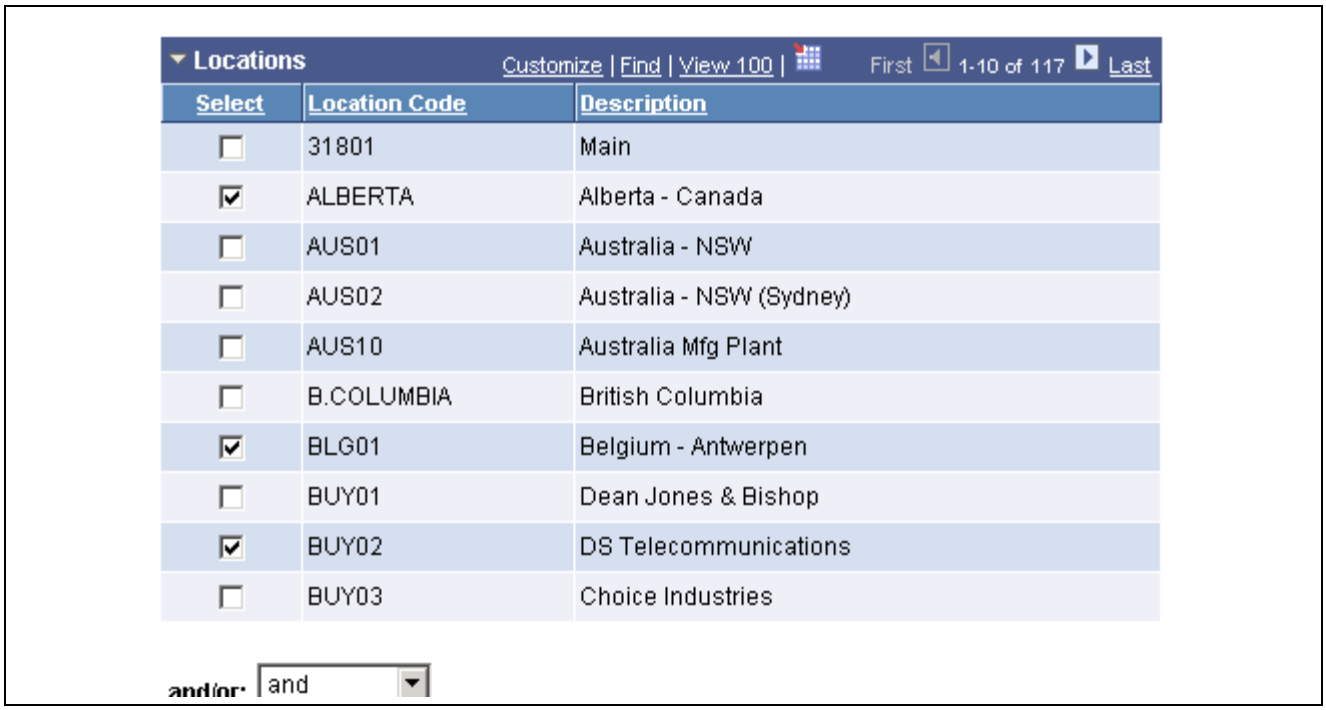
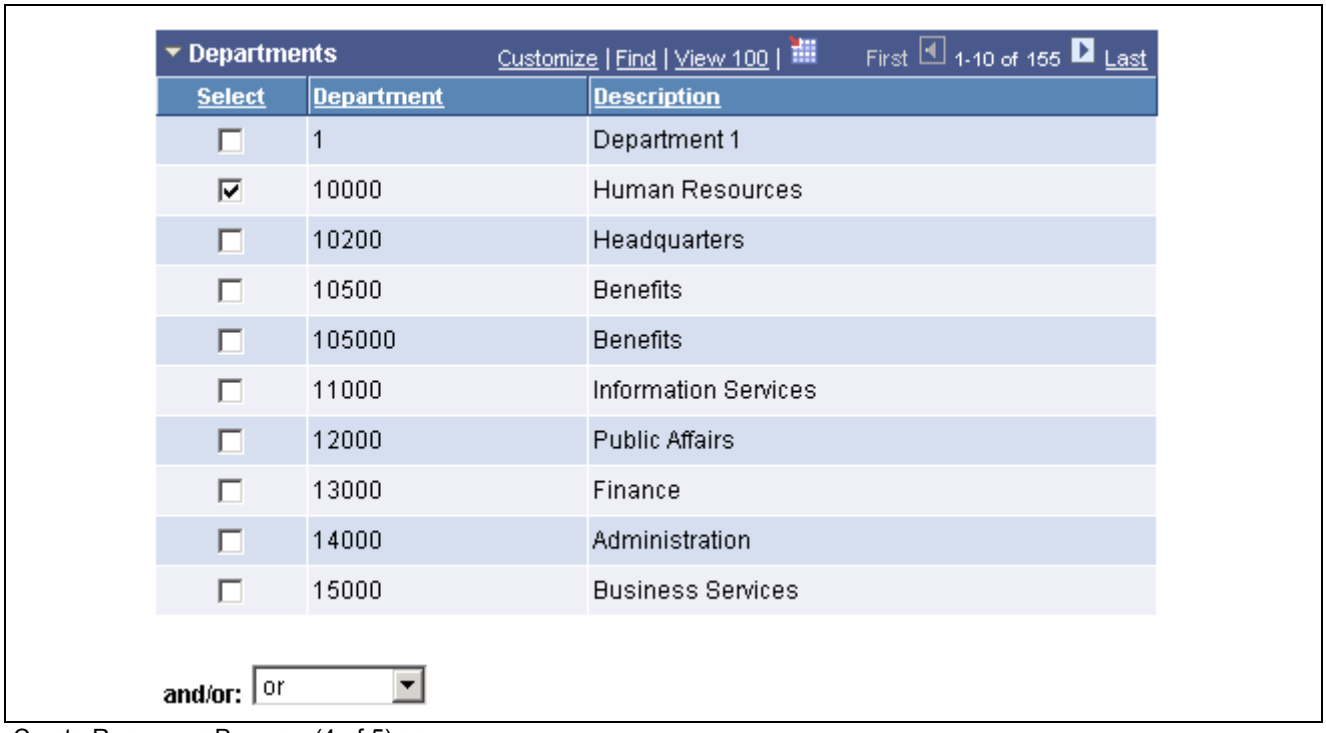


Locations Customize | Find | View 100 | First 1-10 of 117 Last

Select	Location Code	Description
☐	31801	Main
☑	ALBERTA	Alberta - Canada
☐	AUS01	Australia - NSW
☐	AUS02	Australia - NSW (Sydney)
☐	AUS10	Australia Mfg Plant
☐	B.COLUMBIA	British Columbia
☑	BLG01	Belgium - Antwerpen
☐	BUY01	Dean Jones & Bishop
☑	BUY02	DS Telecommunications
☐	BUY03	Choice Industries

and/or: and

Create Resources Program (3 of 5) page



Departments Customize | Find | View 100 | First 1-10 of 155 Last

Select	Department	Description
☐	1	Department 1
☑	10000	Human Resources
☐	10200	Headquarters
☐	10500	Benefits
☐	105000	Benefits
☐	11000	Information Services
☐	12000	Public Affairs
☐	13000	Finance
☐	14000	Administration
☐	15000	Business Services

and/or: or

Create Resources Program (4 of 5) page

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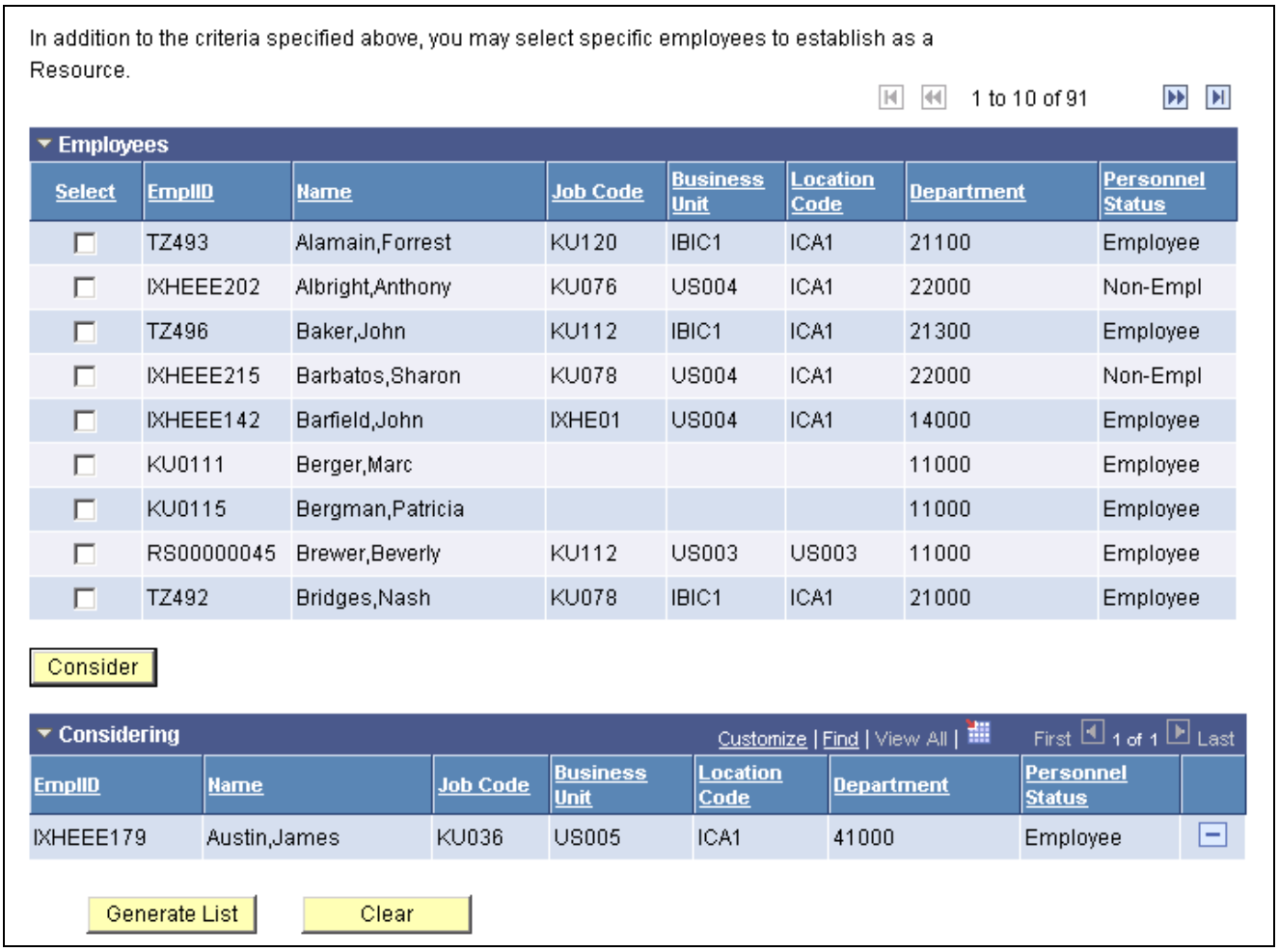

Create Resources Program (5 of 5) page

Job Codes

Select the job codes from which you want to generate employees as resources.

and/or Select:

- *and*

  If you want to narrow the list. The system includes only employees and non-employees that meet these criteria and the criteria that is in the next grid.

- *or*

  If you want to include employees and non-employees that meet any of the criteria that is selected in the grids.

If you leave this field blank, the system includes employees and non-employees that meet any of the criteria that is selected in the grids.

Business Units

Select the business units from which you want to generate employees as resources.

and/or Select:

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- *and*

  If you want the program to generate resources based on the individuals belonging to the selected business units and selected locations identified in the next grid.

- *or*

  If you want the program to generate resources based on the individuals belonging to the selected business units or selected locations identified in the next grid.

Locations

Select the locations from which you want to generate employees as resources.

and/or Select:

- *and*

  If you want the program to generate resources based on the individuals belonging to the selected locations and selected departments identified in the next grid.

- *or*

  If you want the program to generate resources based on the individuals belonging to the selected locations or selected departments identified in the next grid.

Departments

Select the departments from which you want to generate employees as resources.

and/or Select:

- *and*

  If you want the program to generate resources based on the individuals belonging to the selected departments and selected employees identified in the next grid.

- *or*

  If you want the program to generate resources based on the individuals belonging to the selected departments or selected employees identified in the next grid.

Employees

Select the employees who you want to generate as resources.

Consider Select the employees from the list that you want to consider as resources, and then click the Consider button. The selected employees appear in the Considering grid.

Generate List Click this button to create a draft of the proposed list of employees that the system will create as resources based on your selections in each of the grids. You can review the list and decide whether to proceed, or click the Clear button to cancel your selections in order to regenerate the list.

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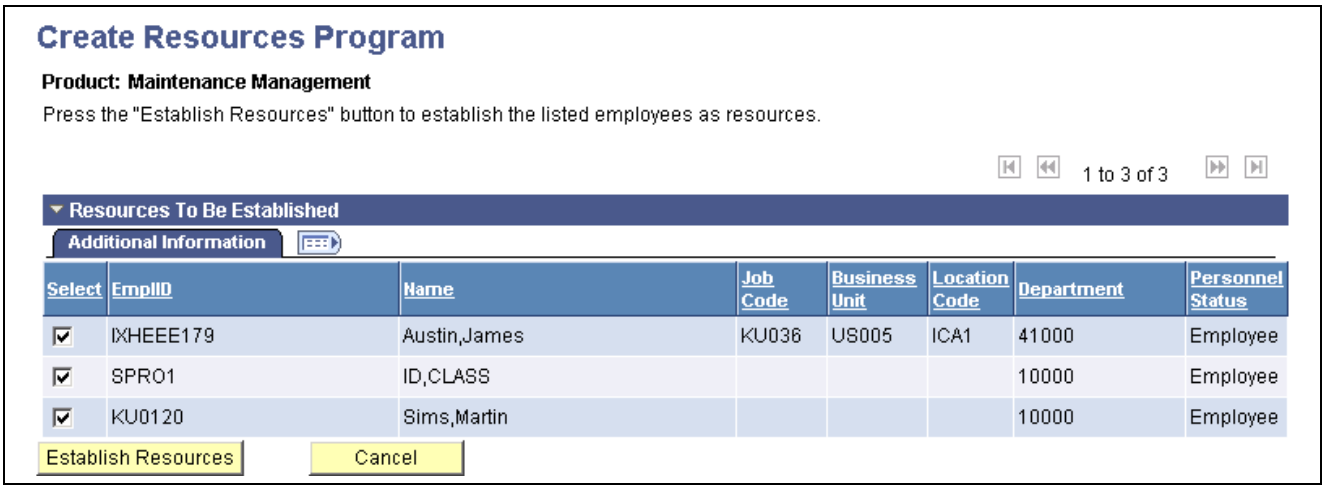
Establishing Resources

Access the Create Resources Program - Establishing Resources page.



Create Resources Program - Establishing Resources page

This list of employees displays after you select Generate List. You can remove the check mark from the employees whom you do not want to generate as resources.

Establish Resources Click this button to run the program to establish the list of selected employees and non-employees as resources.

The Submit Confirmation page displays when you select the Establish Resources button, which displays a message confirming that the employees that you submitted were successfully submitted as resources.

This process does not affect HRMS employee records. It establishes a new row of data in the Worker table (RS_WORKER_TBL) and Worker Effective Date table (RS_WKKR_EFFDT) for each resource.

Important! If any of the resources that you establish have more than one job in PeopleSoft HRMS (more than one active row in the JOB table), they are listed here.

When you execute the process, the system selects the job with the lowest field value in the Employee Record Number field (EMPL_RCD) to enter into the Worker table and Worker Effective Date table. The lowest employee record number represents the job entry that is created first. To change an employee's job, access the Create Resources component and click the Change Job button in the Create Resources page and then click the Select button in the Establish Employee as Resource page to access the Select Job page where you can select a different job in which to assign to the employee.

Note. If the program cannot generate employees based on your selections, the Establish Resources button is not available for selection. You must return to the Create Resources Program page, change your selection criteria, and submit these new selections.

Conflicting Resources PeopleSoft HRMS employees and non-employees can have one-to-many job titles, while the Create Resources program only allows one job title. When

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you run the Create Resources process for employees and non-employees as resources, the system lists each employee with more than one job title in PeopleSoft HRMS as a conflicting resource. The system displays the first job title that was associated with the resource in PeopleSoft HRMS. You can override this job title in PeopleSoft Maintenance Management if necessary.

Setting Up Shifts, Schedule Patterns and Periods, Shops, and Crews

To set up shifts, shops, and crews use the:

- Define Shifts (RS_SHIFT_DETAIL) component.
- Schedule Patterns and Periods (WM_SCHED_PERIOD) component.
- Define Shop (WM_SHOP_DEFN) component.
- Define Crew (WM_CREW_DEFN) component.
- Crew Rescheduling Reason Codes (WM_CSREASON_CD) component.

This section provides an overview of shop and crew management and discusses how to:

- Set up operating hours for a shift.
- Define schedule pattern.
- Define and generate schedule periods.
- Define shop information.
- Define and maintain resources for a shop.
- Define and maintain craft rates for a shop.
- Define and maintain tool rates for a shop.
- Set up service groups for a shop.
- Define inventory commit and reservation rules for work order types.
- Set up timesheet defaults.
- Set up a crew.
- Set up crew rescheduling reason codes.

Understanding Shifts, Schedule Patterns and Periods, Shops, and Crews

The shop supervisor’s goal is to ensure the accurate inventorying and easy deployment of labor resources (technicians), who are needed to complete work order assignments. Before users can set up shops and assign resources to shops, they must set up crafts and the labor resource requirements that are listed in the previous sections.

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Shifts Overview

You can set up a shift for a resource or for a shop. When you set up a shift for a shop, it defines the operating hours for the shop. When you set up shifts for resources, the shift is listed in the resource's profile next to an assigned shop. When the resource works for the shop identified in their profile, the shift in their profile applies when assigning the resource to a work order task.

You can set up default work days for all resources, along with standard work hours and a standard start time in the Resource Setup - Common Installation Options page. You can modify this information in a resource's profile. The default work days, standard hours per work day, and standard start time are used to display the resource's daily calendar. For example, when you view a resource's calendar, the default work days, standard hours per work day, and standard start time are used to create the daily calendar for the resource, regardless of whether the resource has been assigned a shop and a shift. You select a shift for a shop to establish a relationship between resources and weekly shifts.

When the daily calendar is opened, it displays the time slots as per the installation table such as 8:00am – 5:00pm, even if a shift was assigned to a resource. You have the option to view any time slots for a specific day by selecting the start and end time edit boxes.

Schedule Pattern and Periods

To perform crew scheduling of work order tasks, you first must define one or more schedule patterns and assign a pattern to the crew. The crew can have different schedule patterns assigned with different effective dates. The available types of schedule patterns are days, weekly, biweekly, and monthly. Based on the type of schedule pattern, a specified period start date and optionally days in period that you select, the system generates the number of periods desired and marks the current schedule period based on the system date when a period contains the current system date. Once the periods are generated you can enter a date range to display a specific group of periods. You can leave the date range blank and display prior periods. Once the schedule pattern and periods are created, you can associate a schedule pattern with each crew on the Crew Definition page. The schedule pattern and periods that are assigned to each crew are used to assist in determining a crew's capacity to participate in work order tasks. The scheduler adjusts the capacity based on personal knowledge of the crew on each period.

A schedule pattern and its associated schedule periods are set up by setID. The system looks at the current system date to determine the current schedule period. If you generate schedule periods for a schedule pattern using a future date as the Period Start Range Date, the system will not identify the current period on the Schedule Periods page until the actual date rolls around on the system calendar. For example, if the Period Start Range Date is 01/01/2008 using a monthly schedule pattern, and you generate 12 periods, then the system will not mark the period of 01/01/2008 — 01/31/2008 as the current period until the current system date falls within the range of 01/01/2008 and 01/31/2008. The system will roll forward the current period as the system calendar progresses. Based on the previous example, when the system date becomes 02/01/2008, the system will move the current date mark forward to the 02/01/2008 — 02/29/2008 period in the period schedule.

You can make changes to the pattern description, period start date, number of periods, and the number of days in a period until a crew is assigned to the pattern and a crew capacity plan is established, which locks the existing periods. Once the periods are locked, you can add additional periods by entering the number of periods to extend from the last period on the schedule pattern.

Important! It is important to understand that the schedule periods, which are generated on the Schedule Periods page are based on the Period Start Date and the number of periods entered on the on the Schedule Periods page of the component. The current period is determined by the current system date.

See Chapter 19, "Performing Crew Scheduling," page 523.

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Shop Setup and Management

You can associate a single shop with only one work order business unit; however, a single work order business unit may have multiple shops within it. You can assign a single shop to only one location; however, the same location may house multiple shops. The data set up in a shop affects and controls many parts of a work order. You must identify a shop when you create a work order. You can specify a shop in the work order business unit, which becomes the default shop value when you create a work order using that business unit. You can override this value in the work order with another shop. You set up six pages of shop details that can affect and control the work order, which include the:

- Shop Information page.

  This is an effective dated page, which means if you indicate that the page is active, that the options you select or enter on this page remain active from that date forward or until you decide to change the effective date and the data on the page. This enables you to track the shop history. You identify a shift that determines the operating hours of the shop. You also indicate whether you intend to use crew scheduling for work orders associated with this shop.

  You can assign ChartField values at the shop level, which override the default ChartFields in the work order that are based on the ChartField distribution template. The shop is the lowest defaulting level for ChartFields. This means that if a work order is created for a specific shop and you set up a ChartField distribution at the shop level, and create a work order using that shop, then the shop's ChartField distribution will override any ChartFields that are first populated by the work order distribution template. Labor, tools, and inventory only have one default distribution row, which means that the distribution values in the shop will override the values in each row. However, PeopleSoft Purchasing may have more than one default distribution row. In this case the ChartField values defined for the shop distribution will override the same fields in each of the PeopleSoft Purchasing distribution rows. For example, if Dept. 1000 is defined at the shop level, then department 1000 will be the default value on all of the PeopleSoft Purchasing distribution rows. In this case, you may have to modify these ChartField values at the work order level.

  The major purpose of this page is to establish default values for the work order at the shop level. Default values typically follow the standard PeopleSoft default hierarchy by looking at the lowest level first, then the shop level, then the work order business unit level. For example, you can select whether you want workflow approval or preapproved to apply to a work order by specifying values as the work order business unit level, the shop level, and the work order type level. Based on this setup, you select *Default* for work order type CM, and select *Workflow Approval* for Shop A, and select *Pre-Approved* for work order business unit US001. When you create a work order using US001, Shop A, and CM, the system will look first at the work order type value of *Default* and move on to the shop level value of *Workflow Approval* and apply that value to the work order, which means the work order must go through the approval process. However, if you had selected *Default* at both the shop level and the work order type level, then the system would have applied Pre-Approved as the condition for approval in the work order.

  - Record Estimates

    You can indicate that you want to be able to record labor, tools usage, and inventory estimates in the work order when you create a work order for a specific shop, or you can select *Default* at the shop level and apply the your selections in the work order business unit.

  - Schedule Resource

    You can indicate that you want to be able to schedule labor, tools, and inventory resources based on your selections for a specific shop, or select *Default* at the shop level and apply your selections in the work order business unit to a work order.

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- Inventory Commit/Reservation

  You can set up Inventory commit and reservation rules at the work order business unit level, the shop header level, and on the Type page of the shop. The default hierarchy for the Commit/Reservation rule is shop/type, shop header, work order business unit. For example, if a value exists at the Shop/Type level for a commit and/or reservation rule, then when you create a work order using the combination of a specific business unit, shop, and shop/type, then the values set up for the shop/type are used.

- Update Resource Calendar

  If a resource completes work ahead of schedule, selecting the Update Calendar option enables you to update the resource's calendar at the work order task level to free the resource to work on other tasks. You can select *Default* at the shop level and use the value selected at the work order business unit level.

- Overbooking Resources

  You can select a check box to indicate that a user can manually intervene to overbook resources for a work order created with this shop. If you do not select this check box, the system automatically allows overbooking of all resources for work orders created with this shop.

- Chargeback

  If chargebacks are allowed, you can indicate that you want PeopleSoft Project Costing to calculate chargebacks at the work order business unit level, the shop level, or the work order type level. You must activate chargebacks on the Activity - Organization page in PeopleSoft Project Costing for the options in the work order business unit, the shop, and the work order type level to apply. If chargeback is set up in PeopleSoft Maintenance Management and PeopleSoft Project Costing, when you create a work order, the system looks for a value for the work order type specified for the work order, if Default is selected, it then looks for a value for the shop specified in the work order and applies that value to the work order. If the shop value is Default, the system looks at the value in work order business unit and uses it.

  See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Integrating with Maintenance Management," Understanding Integration with PeopleSoft Maintenance Management.

  See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up Accounting for Projects," Revenue and Cost Sharing.

- PeopleSoft Project Costing

  You can indicate the PeopleSoft Project Costing rate options for work orders created with this shop or use the options selected in the work order business unit. You can select either a rate plan, which consist of more than one rate set or you can select a specific rate set.

- Labor Rates

  You can specify the labor cost and bill rates for work orders created with this shop. You can also specify labor rates for each craft on the Craft Rates page of the Shop component. If you specify labor rates at the craft level and you enter the business unit, shop, and craft in the work order, then the craft labor rates serve as the default value in the work order. The system looks at the craft level, then the shop header level, and finally the business unit for the default values.

- Enable Workflow Approval

  You indicate that you want to enable workflow approval at the business unit level, the shop level, or the work order type level. The system looks first at the work order type level, then at the shop level, and finally at the work order business unit level.

  Note. Refer to the example in the introduction to these options.

- Resources page.

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You can select the schedulers, whom you want to perform scheduling for any work orders created with this shop. You assign them each Scheduler Codes and select one as the primary scheduler. This makes it easy to change schedulers of work order tasks. You just change the scheduler's code in the shop and eliminate having to change the scheduler on every work order task to which they were the scheduler was assigned.

Once you create a resource, you can access the Manage Profile component and associate the resource with one or more crafts on the Craft page, and assign the employee to one or more shops on the Shop page. This resource is automatically added to the Resources page of the assigned shop. You can access the Manage Profile page directly from the Resources page in the shop for each resource. When you create a work order and schedule a resource, the resource must be associated with the shop used in the work order.

The Resources page also lists any crews assigned to this shop. You can assign a specific crew to only one shop; however, a shop can have multiple crews assigned to it. You can split the time between a resource, who is assigned to more than one crew.

- Craft Rates page.

  You can set up labor cost and bill rates by craft, which will override any labor rates specified for the shop or the business unit as the default value when you select on of the crafts listed here in the work order task.

- Tool Rates page.

  You can specify tool cost and bill rate for tools used for a work order task at the shop level. This is also where you apply these rates based at the asset subtype level. If you do not specify these rates at the shop level, then the rates defined at the asset subtype level are applied to the work order.

- Service Group page.

  You can identify the types of services a shop can provide through the selection of one or more service groups.

- Type page.

  You can specify combinations of Inventory commit and reservations rules for each work order type within the shop.

- Timesheet Defaults page.

  You set up the Timesheet prefix, which will be used when you stage the timesheet entries in the Work Order Completion component.

Crew Setup

PeopleSoft Maintenance Management enables you to schedule crews for a work order tasks. You indicate on the Shop Information page that you intend to schedule crews for work orders. Before you set up your crews, you set up your shops, because you must associate each crew with a shop. You can select one crew associated with a shop as the primary crew. The selected primary crew will be used to determine the default crew in the work order task. After you create a crew, the crew name displays on the Define Shop - Resources page. Only resources that you identified for a shop can be added to the shop's crew. You must select a schedule pattern for each crew if crew scheduling is performed by the shop. Once a schedule pattern is assigned to a crew and a crew capacity plan is defined, it is locked. However, you can continue to add additional periods to that schedule pattern. Effective dating is applied to the selected crew pattern and the selected resources. If you indicate that a crew is inactive, this removes the crew from the Resources page of its assigned shop. When a resource is added to a crew, the default craft value is the resource's primary craft. You can select another craft from a list of crafts associated with the resource as the primary craft for the resource. You can identify only one resource as the leader of the crew. A crew may have multiple resources and one resource can belong to multiple crews assigned to the same shop or different shops. You enter a capacity percentage to allocate a crew resource to more than one crew. :

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Crew Resource	Shop/Crew/ Capacity %
Joe Jones - Electrician	• Shop A: Crew 1 = 20% • Shop A: Crew 2 = 80%
Estelle Parsons - Carpenter	• Shop A: Crew 1 = 50% • Shop B: Crew 3 = 50%

You will *not* receive an error if the total capacity percentage for a resource assigned to more than one crew is less than 100%. You *will* receive a warning message if the total capacity percentage for a resource assigned to more than one crew is greater than 100%.

Effective dating for each crew enables you to track changes to the schedule pattern, any addition and removal of resources assigned to the crew, and whether a crew is active or inactive as of a specific date. When adding a new effective dated row on the Define Crew page, the system ensures that there is no crew capacity with a period end date that is greater than or equal to the specified effective date. This prevents overlapping crew capacity plans.

Crew Rescheduling Reason Codes

You define as many of these codes as are necessary to establish the reasons why you may be rescheduling a crew. When you reschedule a crew on the Crew Scheduling Workbench, you can select the reason for the rescheduling.

Pages Used to Set Up Shifts Shops, and Crew Information

Page Name	Object Name	Navigation	Usage
Define Shifts	RS_SHIFT_PG	• Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shifts • Click the Define Shop Operating Hours link on the Shop Information page.	Enables a user to create a shift and assign operating hours to it.
Schedule Pattern	WM_SCHED_PATTERN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Schedule Pattern	Set up schedule patterns associate them with periods to use to determine crew assignments.
Schedule Periods	WM_SCHED_PERIOD	Select the Schedule Periods tab.	Define the number of schedule periods that fall within a given date range based on the selected schedule pattern.
Shop Information	WM_SHOP_DEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Shop Information tab.	Define shop header data and any default values for this shop.

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Page Name	Object Name	Navigation	Usage
Distribution Defaulting Setup for Shop	WM_SHOP_DIST_SEC	Click the Define Distribution Default Setup link on the Shop Information page.	Set up default ChartField distribution values to display when this shop is selected for a work order.
Resources	WM_SHOP_RES	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Resources tab.	Assign the schedulers, resources, and crews to a shop.
Craft Rates	WM_SHOP_CRFT_RATE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Craft Rates tab.	Add one or more rows consisting of crafts and their associated rates to a shop.
Tool Rates	WM_SHOP_TOOL_RATE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Tool Rates tab.	Add one or more rows consisting of asset classifications for tools derived from the Asset Repository and the associated tool rates to a shop.
Service Groups	WM_SHOP_SRVC_GRP	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Service Groups tab.	Add one or more service groups to associate with this shop.
Type	WM_SHOP_TYPE	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Type tab.	Define Inventory commit and reservation rules combinations for one or more work order types.
TimeSheet Default	WM_SHOP_DFLTS	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Shop, click the Timesheet Default tab.	Set up timesheet default values to use for the Work Order Completion component time entries.
Define Crew	WM_CREW_DEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Resources, Define Crew	Add one or more employees to a crew.
Crew Rescheduling Reason Codes	WM_CSREASON_CD	Set Up Financials and Supply Chain, Product Related, Maintenance Management, Setup, Crew Rescheduling Reason Codes	Set up reasons for rescheduling crews.

Setting Up Operating Hours for a Shift

Access the Define Shifts page.

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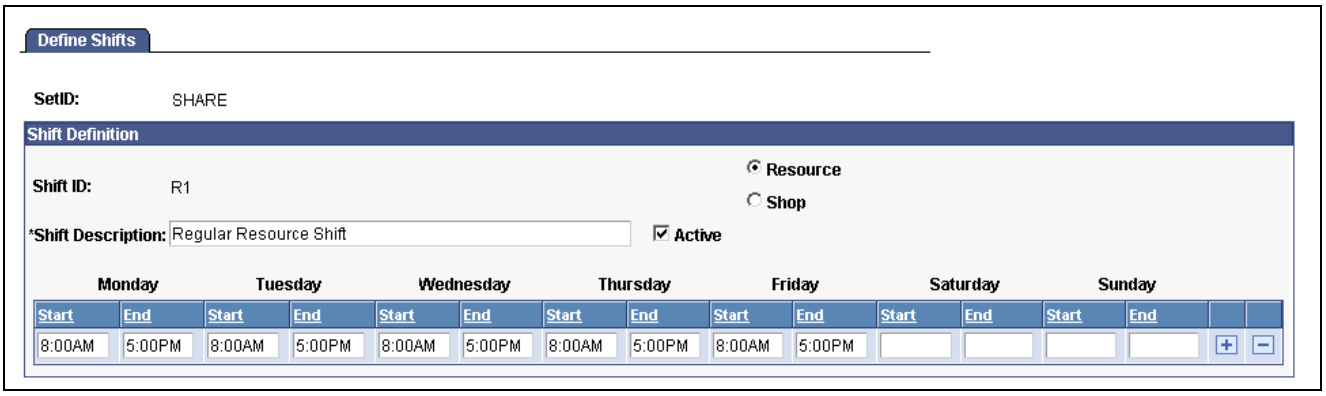


Define Shifts page

Shift ID Enter a shift ID to which you want to assign operating hours.

Resource and **Shop** Click the Resource option to indicate that this shift applies to an individual resource, or click the Shop option if this shift applies to a shop.

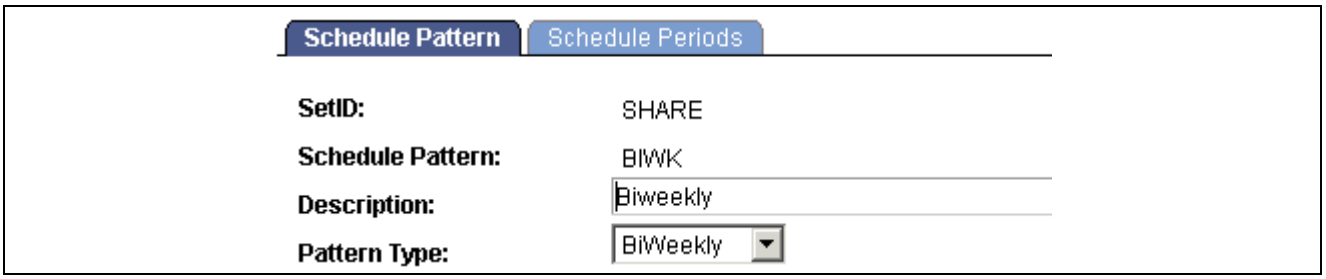
Active Select this check box to indicate that is shift is currently active for any shops or resources that you associated with it.

Start and **End** Enter the start and ending times for each shift based on the day of the week. You can add additional rows if there a multiple shifts in a day.

Note. You can enter more than one row of weekly start and end dates for a shift.

Defining Schedule a Pattern

Access the Schedule Pattern page.



Schedule Pattern page

SetID Enter a setID to either find an existing Schedule Pattern value or add a new Schedule Pattern value.

Schedule Pattern Enter a short name for the schedule pattern that you want to set up, such as *BIWK* .

Description Enter a long description of the pattern, such as *14 day period*.

Pattern Type Select one of these pattern types:

- *Days*

  Indicates that the crew will be scheduled based on a specific number of days in the period.

- *Weekly*

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The crew will be scheduled on a weekly basis.

- *Biweekly*

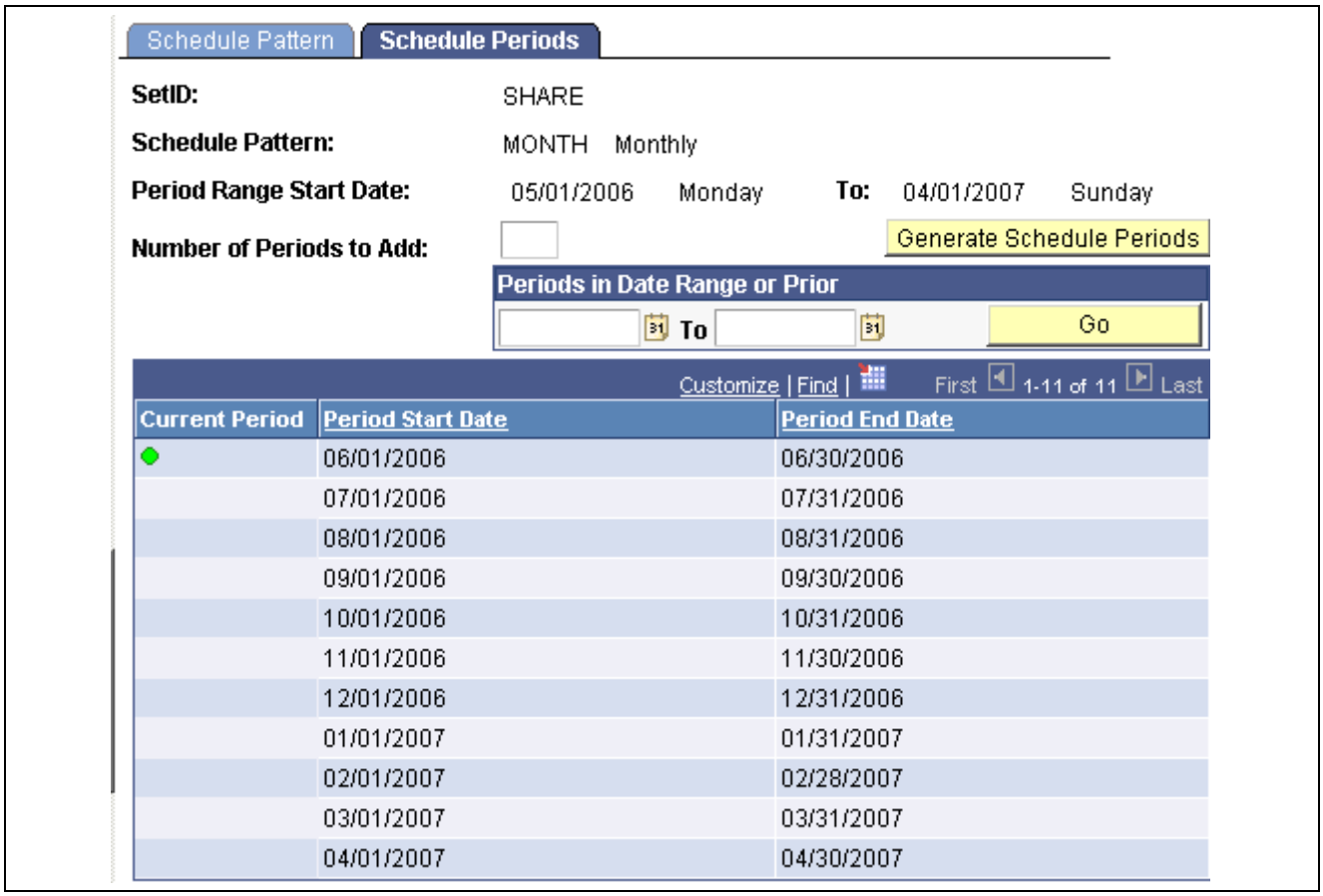
  The crew will be scheduled on a biweekly basis.

- *Monthly*

  The crew will be scheduled on a monthly basis.

Defining and Generating Schedule Periods

Access the Schedule Periods page.



Schedule Periods page

Period Range Start Date and **To** — Select the start date of the period range for which you want to generate schedule periods. The system generates the To date (period end date) based on the schedule pattern you selected and the number of periods you that you indicate you want to add.

Number of Periods to Add — Enter the number of periods you want to generate. Based on the Biweekly pattern, for example, you can enter *10* periods. When you click the Generate Schedule Periods button , the system lists 10 biweekly periods.

Generate Schedule Periods — Click this button and the system generates the number of periods that you entered and enters the final date of the period in the To field of the date period range.

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Periods in Date Range or Prior

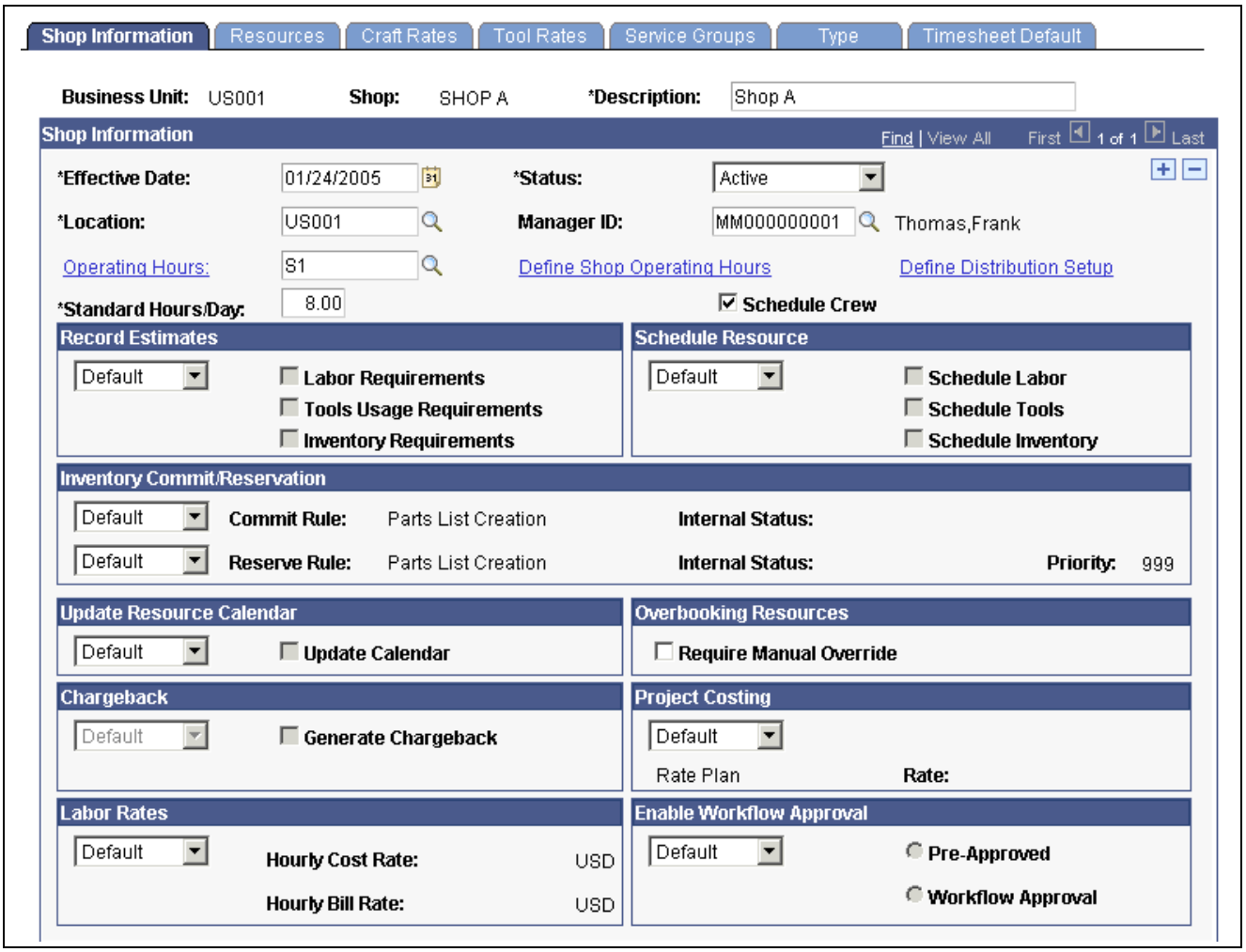
Select the from date and the to date and select the Go button to display periods within the date range. When the *from* date is left blank, the system returns all periods starting on or prior to the to date. When the *to* date is left blank, the system returns all periods starting on or after the *from* date. When both fields are left blank, the system returns all existing periods in this pattern. After the periods display, you can click the Back to Current/Future Periods button to redisplay the current and future periods in your original date range.

Current Period

A green dot indicates the current schedule period based on the current system date that falls within a generated period. If none of the periods fits this criteria, a current period indicator will not appear on the page.

Defining Shop Information

Access the Shop Information page.



Shop Information page

Shop

Enter a shop ID on the Add a New Value page.

Note. A specific shop can be assigned to only one business unit; however, a business unit may be associated with many different shops.

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Effective Date and **Status** — Enter an effective date for the data in this Shop Information group box and indicate whether it is *Active* or *Inactive*. These are required fields.

Note. You can maintain a history of changes in shop information data for this shop by one or more pages of values and changing the effective dates and statuses for the information entered on each page.

Location — Select the location of this shop. This is a required field.

Manager ID — Select the employee ID of the manager that you want to assign to this shop. The shop manager must be created as a resource in Maintenance Management.

Operating Hours — Select a shift value that contains the appropriate operating hours for this shop. This is a required field.

Note. Click the Operating Hours link to view the operating hours for the selected shift.

Define Shop Operating Hours — Click this link to access the Define Shifts page to set up a new shift for this shop.

Define Distribution Setup — Click this link to access the Distribution Defaulting Setup for Shop page, to set up ChartField distributions to use to distribute and track costs for this shop. These default values display in the work order task when assigning and scheduling resources associated with this shop.

Note. ChartFields defined at the shop level supplement the defaulting values entered in the Distribution templates.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Setting Up a Distribution Template, page 122.

Standard Hours/Day — Enter the standard hours that this shop is open each day. This is used to calculate the adjusted crew capacity in days.

Schedule Crew — Select this check box if your organization intends to schedule crews defined within this shop.

Record Estimates

This group box determines whether you want to record estimates based on labor , tools usage, and inventory requirements specified in the work order task based on the default values in the work order business unit or the values you select here in the shop. Select *Default* to indicate that you want to use the default options selected in the business unit to apply to this shop, or select *Specify* if you want to specify the options listed in this group box to apply when this shop is used to create a work order and then select the labor, tools usage, and inventory requirement estimates that you want to record.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Work Order Business Unit Setup, page 75.

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Schedule Resource

This group box determines whether you want to schedule labor, tools, and inventory resources for work order tasks based on the specifications at the work order business unit level or values that you select here in the shop. Select *Default* to indicate that you want to use the default options selected in the business unit to apply to this shop, or select *Specify* if you want to enable users to schedule labor, tools, and inventory in any work orders created for this shop.

Inventory Commit/Reservation

To commit and reserve parts in PeopleSoft Inventory, you can select a combination of Inventory commit and reservation rules at either the work order business unit level or here at the shop level. Select *Default* to use the commit and reservation rule combination that you set up at the work order business unit level or select *Specify* to select a commit and/or reservation rule combination to apply when this shop is used to create a work order. You can also set these rules up for one or more work order types defined within the shop on the Type page.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Work Order Business Unit Setup, page 75.

Update Resource Calendar

Select *Default* to indicate that you want to use the Update Resource Calendar default value in the work order business unit, or select *Specify* and either select the Update Calendar check box or clear it for this shop. If selected and a resource completes the work ahead of schedule, this option allows the resource's schedule to be freed up for new work assignments. This setting applies to both labor and tools for schedule update.

Overbooking Resources

Require Manual Overrides Select this check box to enable a scheduler to manually overbook a labor resource associated with this shop. If this check box is cleared, then the system automatically overbooks the labor resources whenever an assignment conflict occurs.

Chargeback

Select *Default* to indicate that you want to use the Generate Chargebacks default options set up in the work order business unit for this shop. Select *Specify* and either select the Generate Chargebacks check box or clear it depending on what you want to do for work orders created using this shop. Selecting this field enables users to charge the costs generated for any work orders associated with this shop back to another organization within the enterprise.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up Accounting for Projects," Revenue and Cost Sharing.

PC Template (Project Costing Template)

Select *Default* to indicate that you want to use the PeopleSoft Project Costing default rate set setting in the work order business unit for this shop. Select *Specify* and select the PeopleSoft Project Costing default rate plan, which contains more than one rate set, or rate set along with the accompanying rate that you want to use when you create a work order using this shop. This value is a Rate template defined in PeopleSoft Project Costing that can be used as a default value for chargebacks.

Labor Rates

Select *Default* to use the hourly cost rate and billing rate that are set up in the work order business unit for this shop. Select *Specify* and enter the hourly cost rate and billing rate that you want to apply to the work order task for a work order created with this shop.

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Important! The labor cost and bill rates specified on the Shop Information page are independent of the resource. For example, if work order Task 1 requires an electrician and the work order is created for SHOP1, then the labor rate for the electrician for SHOP1 is derived first from the shop's craft rate. If the electrician's rate is found in the SHOP1 craft rates record, then that rate is applied to the work order task. If the labor and bill rates are not specified for a craft and they are specified for a specific shop, then the system applies the shop rates for the work orders created with this shop. Otherwise, the system gets the rates from the labor cost and bill rates specified in the work order business unit.

Enable Workflow Approval

Select *Default* to apply the workflow approval settings in the work order business unit or work order type (depending on the default hierarchy selected in the work order business unit) to this shop. Select *Specify* and indicate whether work orders created for this shop are preapproved or require workflow approval.

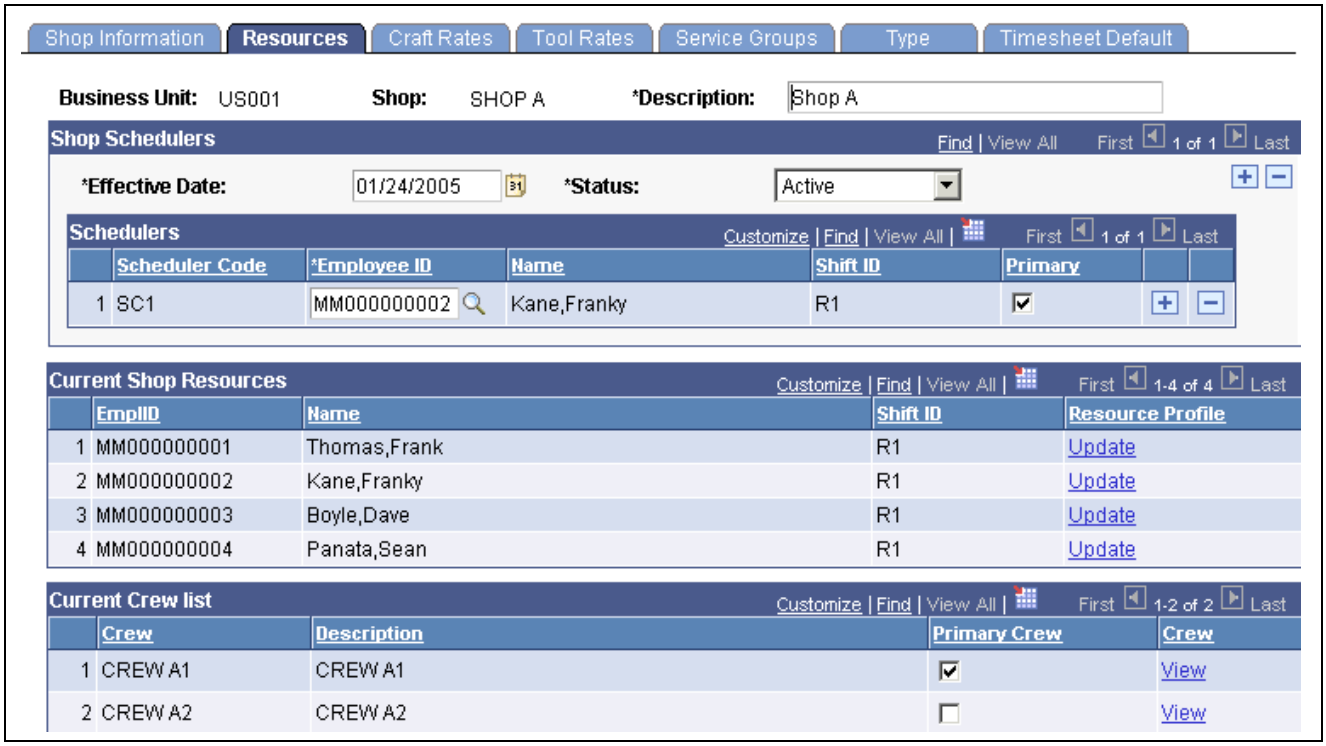
See Also

Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Work Order Business Unit Setup, page 75

Chapter 10, "Configuring Work Order Approval Workflow," Understanding the Work Order Approval Workflow Architecture, page 251

Defining and Maintaining Resources for a Shop

Access the Define Shop - Resources page.



Define Shop - Resources page

Effective Date and **Status** Select an effective date and status for the setup of the schedulers in this grid. You can create more than one grid with different effective dates and statuses and keep a history of these changes.

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Scheduler Code Enter a user-defined code to represent the scheduler assigned to this shop. The code that you enter here is unique to the scheduler in this shop and displays in the work order instead of the scheduler's employee ID. If the employee, who is assigned as a scheduler for this shop is no longer available, then you just have to change the employee ID of the scheduler in the shop, instead of changing it in every work order.

Employee ID Select the employee ID to identify this scheduler, which results in the display of the scheduler's name and shift ID.

Primary Select this check box to indicate that one of the schedulers listed is the primary scheduler.

Note. You can assign more than one scheduler to a shop; however, you can identify only one scheduler as the primary scheduler.

Current Shop Resources

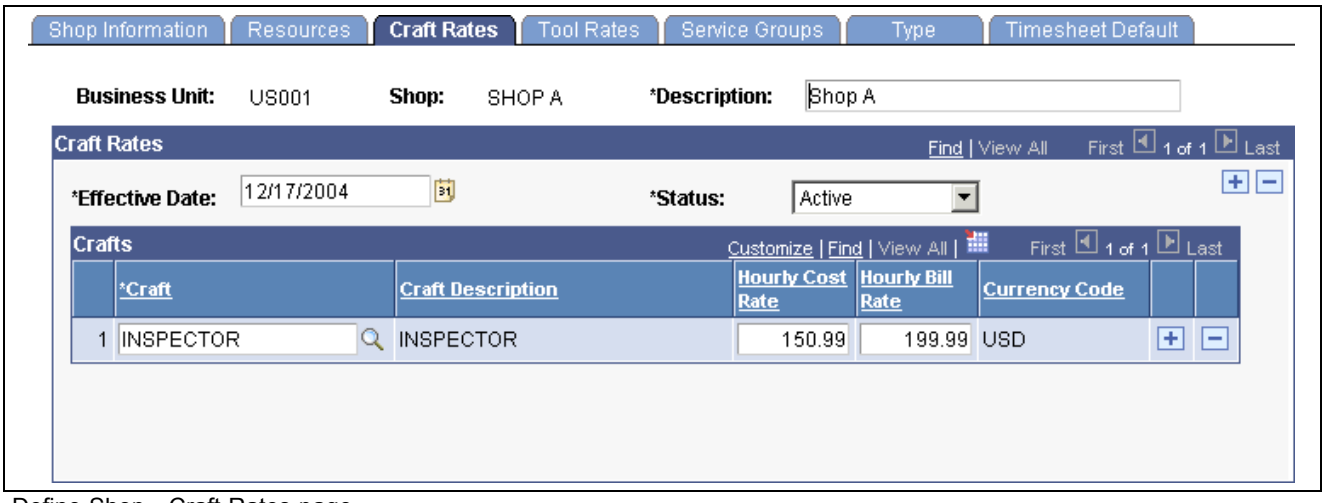
You associate a resource with a shop in the resource's profile using Manage Profiles. Each resource that you assign to a shop automatically displays on this page. This page only displays currently active resources. If you assign a crew to a shop, each resource that comprises the crew must appear in this Resources grid. You can click the Update link to access the resource's profile from this page.

Current Crew List

When you set up a crew, you must associate it with a shop, which is automatically added to this crew list. This page only displays currently active crews for the shop. You can only identify one of the crews as the Primary Crew. The primary crew displays as the default crew in the work order task. You can click the Crew link to view the setup of the crew.

Defining and Maintaining Craft Rates for a Shop

Access the Define Shop - Craft Rates page.



Define Shop - Craft Rates page

Set up one or more crafts and their associated hourly cost and hourly bill rates to use for chargeback calculations for this shop.

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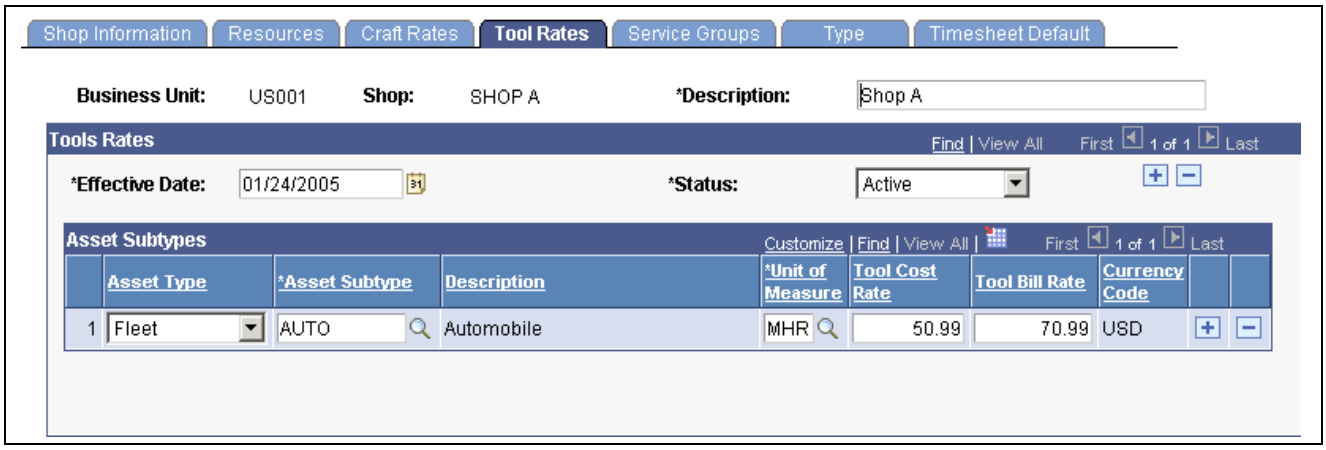
You can specify a labor cost and bill rate at the work order business unit level to display as default values for work order task labor resources. You can override these business unit rates on the Shop Definition page. When a work order is created for the shop, the default values from work order task labor cost and bill rates in the shop are derived from the work order business unit unless you specified the shop labor rates at the shop level or cost and bill rates for a specific craft at the shop level. If you specify the rates here at the craft level, then the system applies these rates to the work order task. The labor cost and bill rates specified on the Shop Information page are independent of an individual resource. For example, if a work order task #1 requires an electrician and SHOP1 is associated with the work order, then the labor rates for an electrician assigned to SHOP1 is derived first from the labor rates set up for a craft in the shop's Craft Rates page. If a rate is set up for an electrician rate in the Craft Rates page, then the work order task uses this rate. If the rate is not set up for the craft in the shop, the system derives the rate if the labor cost and bill rates are set up in the shop, or , if not, it derives rates specified in the business unit.

The currency code for both the shop and tool rates is always the base currency specified in the work order business unit and cannot be modified.

Defining and Maintaining Tool Rates for a Shop

Access the Define Shop - Tool Rates page.

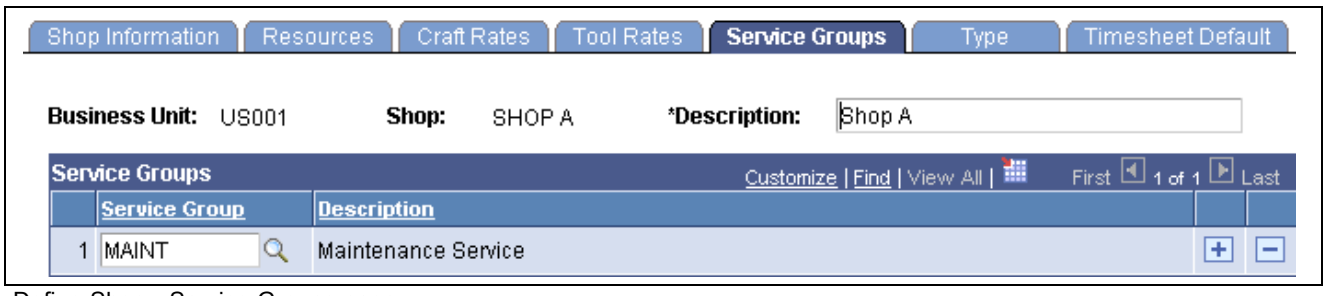


Define Shop - Tool Rates page

Add and describe the asset types and asset subtypes that this shop uses as tools and their associated cost rate and bill rates. You can define tool cost and bill rates at the shop level and the asset subtype level. If you do not define tool rates at the shop level, the system uses the rates defined at the asset subtype level. If the rates from the asset subtype level are in a different currency, the rates are converted to the base currency specified in the work order business unit.

Setting Up Service Groups for a Shop

Access the Service Group page.



Define Shop - Service Groups page

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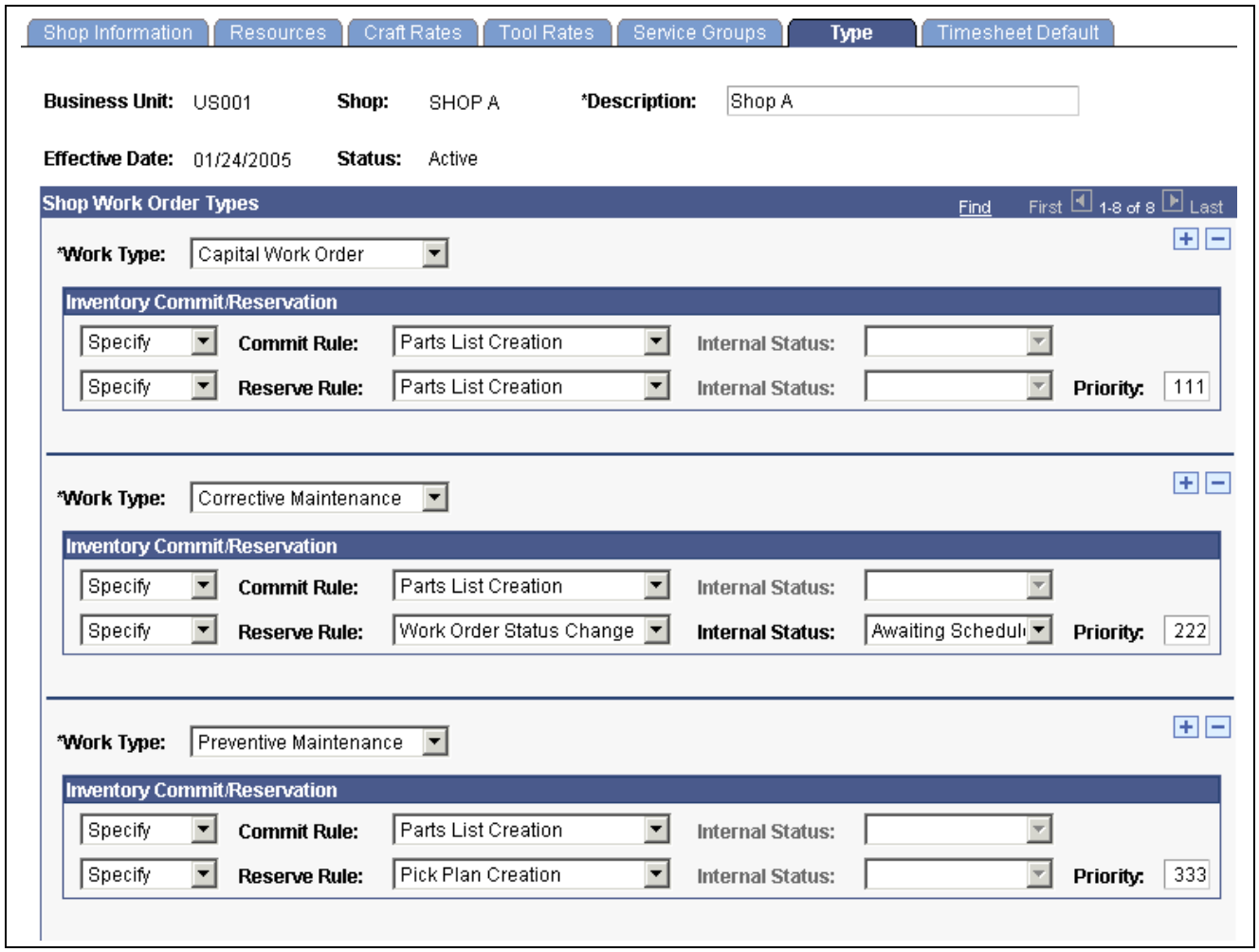
You must select at least one service group for a shop. You can add more service groups if desired. Some shops can provide multiple services. For example, a shop may be able to handle fleet and plant equipment, but not IT support. When you select a service group for a work order, then you can only select a shop for the work order from the shops that have the selected service group set up in their Service Groups page.

Defining Inventory Commit and Reservation Rules for Work Order Types

Access the Type page.



Define Shop - Type page

Work Order Type Select a user-defined work order type in which to apply commit and reservation rules. The work order type values delivered in the system data include:

- *Capital Work Order*
- *Corrective Maintenance*
- *Preventive Maintenance*

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Creating Work Order Types, page 110.

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Inventory Commit/Reservation

Select a value of *Default* or *Specify*.

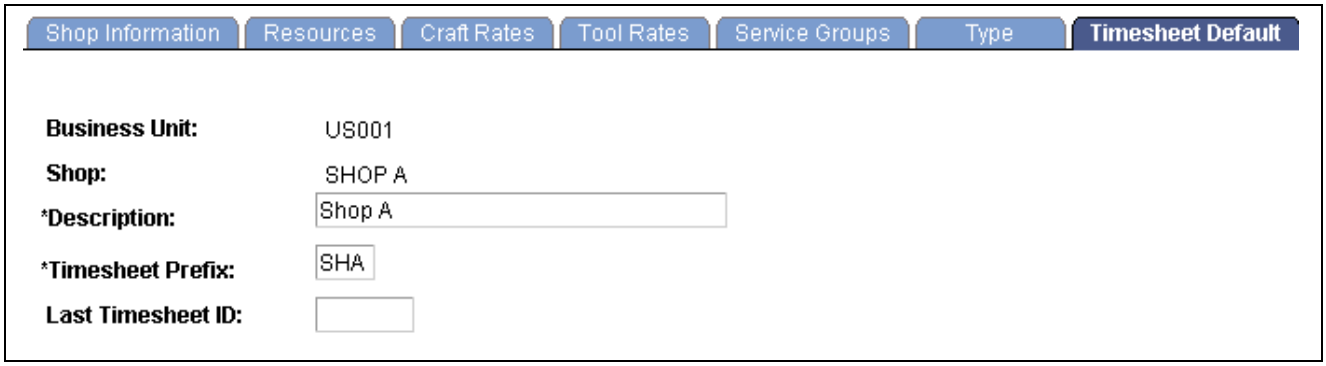
When you select *Default*, any work order created with this shop and work order type applies the commit and reservation rules to the work order task based on commit and reservation rule setup selections on the Shop Information page or on the Integrations page of the work order business unit. When you select *Default*, the system displays the values that were specified in one of these two pages.

When you select Specify, any work order created with this shop and work order type applies the commit and/or reservation rules that you specify on this page to the work order task.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Integration Options, page 88.

Setting Up Timesheet Defaults for a Shop

Access the Timesheet Defaults page:



Define Shop - Timesheet Defaults page

Timesheet Prefix

Enter the prefix associated with the last timesheet generated. This prefix is used when the timesheet entries are sent from the Work Order Completion component to the Staging Tables for Project Costing.

For example, if the prefix used for your timesheets is ABC and the last time sheet ID is 1234, then the next timesheet ID generated from the Work Order Completion component will be ABC1235.

Last Timesheet ID

Enter the number of the last timesheet entered for this shop

Setting Up a Crew

Access the Define Crew page.

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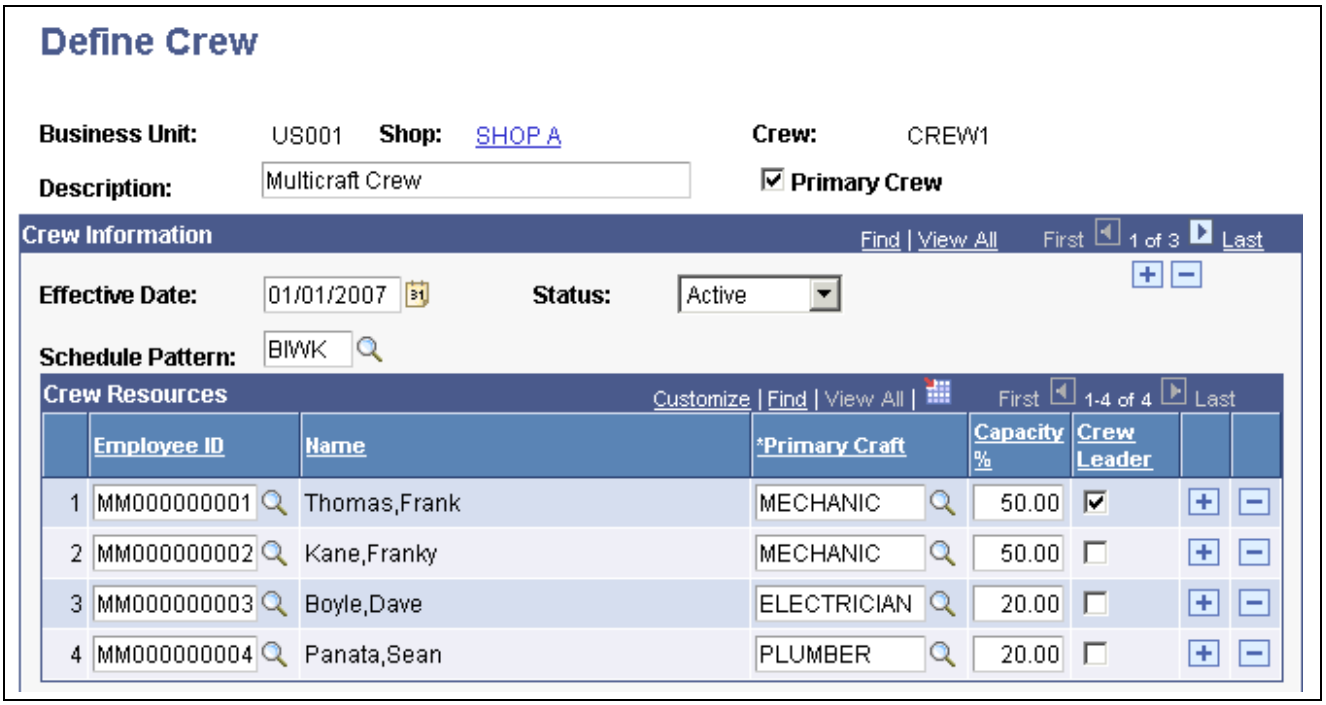

Define Crew page

Shop Select the shop to which you want to assign this crew on the Add a New Value page.

Note. A single crew can be assigned to only one shop; however, a shop may have many different crews assigned to it.

Crew Name Enter a crew name on the Add a New Value page.

Note. Each individual crew can be associated with only one business unit; however, a business unit may be associated with many different crews.

Primary Crew Select this check box to indicate that this is the primary crew for the shop. You can assign multiple crews to a shop, but you can only identify one of those crews as the primary crew. The primary crew serves as the default crew in the work order task.

Effective Date and **Status** Enter an effective date and status. You can track the changes in these crews based on changes in effective date and status. You can create more than one page with different effective dates and statuses. To create a crew capacity plan, the crew must have a current effective date that corresponds with the available schedule periods.

Schedule Pattern Select the schedule pattern to associate with this crew.

Crew Resources

Add each resource that you want to assign to the crew in the Crew Resources grid. You must set up each resource that you assign to a shop's crew in the Resources page of the Shop component.

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Employee ID Select the employees (resources) that you want to assign to this crew. All employees assigned to a crew must be created as resources in Maintenance Management and must be active resources of the shop as of the effective date.

Primary Craft Select the craft in which each crew member primarily works. The primary craft is used to generate a crew capacity plan based on resources assigned to this crew. You can override this primary craft when you create a crew capacity plan.

Capacity %(capacity percent) Enter the percentage of resource's capacity to allocate to this crew. This enables a crew scheduler to share a labor resource's time between two or more crews.

Setting Up Crew Rescheduling Reason Codes

Access the Crew Rescheduling Reason Code page.

Crew Rescheduling Reason Codes

SetID Enter or select the setID that you want to use with these reason codes on the Add a New Value tab.

Reason Code Create reason code of 10 characters or less that briefly describes the reason for the crew rescheduling.

Description and **Short Description** Enter a long description that provides a more thorough description of the code, and enter a short description.

Maintaining Resources in PeopleSoft Maintenance Management

To set up resource groups, resource craft assignments, and resource eligibility status, use the:

- Set Up Resource Group (RS_RESOURCE_GROUPS) component.
- Assign Resources to Craft (RS_CFT_ASSGN) component.
- Maintain Resource Eligibility (RS_WRKR_MGMT) component.

This section provides an overview of resource maintenance and discusses how to:

- Set up resource groups.
- Assign resources to crafts.
- Maintain resource eligibility.

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- Add or change resources' eligibility.
- Maintain resources' profile.
- Maintain a resource's work experience.
- Maintain resources' qualifications.
- Maintain general information for resources.
- Review resource profiles.
- Maintain craft assignments for resources.
- Maintain shop assignments for resources.
- Manage a resource's monthly schedules.
- Review a resource's daily schedules.
- Add or modify task details for resources.

Understanding Resource Maintenance in PeopleSoft Maintenance Management

This section discusses:

- Resource groups.
- Resource craft assignments.
- Resource eligibility status changes.
- Resource profile maintenance.

Resource Groups

Resource groups are collections of resources defined by supervisor ID or shop ID in PeopleSoft Maintenance Management. You can select one or more supervisors or one or more shops to include in a resource group. The pool of resources reporting to any of a resource group's selected supervisors or assigned to any of the resource group's selected shops are included in the appropriate resource group. When you schedule a work order task, you can select one or more rows in the labor schedule, select a resource group, and then click the Recommend Labor button to run the Match Engine to recommend a list of resources in the resource group that match the work order task requirements. If you do not select a resource group to limit your search, the system searches through all of the resources set up in PeopleSoft Maintenance Management.

When you create a resource group based on one or more shops and select a Resource Group and the Recommend Tools button in the Tool Schedules grid for a work order task, the Match Engine considers only the tools assigned to the shop. If you do not select a resource group, the Match Engine searches through all of the assets identified as tools in the asset repository that fall under a specified asset classification.

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Resource Craft Assignments

You can assign multiple resources to a craft. You can search for the resources that you want to assign to the craft by identifying one or more supervisors and searching for all resources associated with the selected supervisors. When you click the Click to populate resources button, the resources associated with the selected supervisors are listed. You can then delete the resources that you do not want to assign to the craft. Once you assign a resource to a craft, the craft is listed for the resource in the resource's profile (Manage Profiles). When you add a craft in the Craft page and save the page, you can indicate whether you want to copy accomplishments and competencies for this craft from the craft's qualification profile for nonHCM employees. Competencies and accomplishments are already added in PeopleSoft HCM for employees who are set up in the PeopleSoft HCM database.

Resource Eligibility Status Changes

You can change the eligibility of a resource from active to inactive and vice versa. You can also add rows to indicate future eligibility effective dates for a resource. If you change a resource to ineligible at a future date, this does not prevent you from scheduling the resource before the effective date for an assignment that begins or continues after the effective date. However, you can no longer assign the resource on or after the date that the resource becomes ineligible and the resource is not included in Resource Matching. You can continue to access and update the ineligible resource's profile.

Important! The assignments for a resource, if you are using the PeopleSoft HRMS employee source database, are automatically canceled when an employee's status changes in PeopleSoft HRMS from active to any other status.

Resource Profile Maintenance

The resource profile is a dynamic record designed for periodic review and update by the resource and the resource's managers to reflect changes in the resources qualifications. You view or modify various parts of a resource's profile when you establish and maintain the resource.

You can add crafts to a resource's profile in the Manage Profile - Craft page. You add a craft to an employee, who is not set up in the PeopleSoft HCM database, you can copy the qualification profile associated with the craft to the nonHCM employee. PeopleSoft HCM employee qualifications are updated in the PeopleSoft HCM system.

When you assign a resource to more than one shop with overlapping shifts on the PeopleSoft Maintenance Management, Labor Administration, Manage Profiles page, you will receive the following message:

Warning — Business Unit US001, Shop ID SHOP A, Shift L1 overlaps with the previous shift (US001, SHOP B, L1) for 2006- 08 - 09

You are about to assign a resource to work on two different shifts that overlap one another.

Since this is a warning message, you can select OK and proceed with the assignment.

For example, a painter, Jerome Kern, is assigned to Business Unit US001 and Shop A. The painter's assigned shift is L1 (8 a.m. to 4 p.m) Monday thru Friday. However, the organization needs Jerome Kern to perform work in any one of 5 Maintenance Shops (SHOP A, SHOP B, L-SHOP1, L-SHOP2, L-SHOP3) during the 8 a.m. – 4 p.m time period. To solve this problem, you can select the Labor Administration, Manage Profiles component, select Jerome Kern, and select the Shop tab and add the following rows:

Business Unit	Shop	Shift
US001	SHOP A	L1

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Business Unit	Shop	Shift
US001	SHOP B	L1
US001	SHOP-L1	L1
US001	SHOP-L2	L1
US001	SHOP-l-3	L1

When you click the Save button, the following message appears:

If you enter all the rows at once and Save the page, the system compares two rows at a time to each other. For example, SHOP A/L1 is compared to SHOP B/L1, then SHOP A/L1 is compared to SHOP-L1/L1, then SHOP A/L1 is compared to SHOP-L2/L1 and so on. You must click the OK button for each comparison before you can return to the menu. You may have to click the OK button several times if there are multiple shops. Manage: Profiles – Shop page

Pages Used to Maintain Resources

Page Name	Object Name	Navigation	Usage
Resource Group Definition - Resource Groups	RS_RESOURCE_GROUPS	Maintenance Management, Labor Administration, Setup Resource Group	Add a new resource group or access an existing resource group.
Resource Group Definition - Resource Group Details	RS_RSRCGRP_ADD	Click the Edit button on the Resource Group Definition - Resource Groups page.	Define a group of tool or labor resources to use to narrow the search in the resource matching process.
Assign Craft	RS_CFTASSGN_PG	Maintenance Management, Labor Administration, Assign Resources to Craft	Assigns resources to a craft based on a supervisor ID.
Maintain Eligibility - Resource Search	RS_WRKR_MGMT_SRCH	Maintenance Management, Labor Administration, Maintain Eligibility	Search for an employee for whom you want to maintain eligibility.
Maintain Eligibility	RS_WRKR_MGMT	Maintenance Management, Labor Administration, Maintain Resource Eligibility	Indicate whether a resource is eligible or ineligible to be assigned to a shop, crew, or work order task.
Resource Eligibility Management	RS_WRKR_MGMT_FUT	Click the Change or Add Eligibility button on the Maintain Eligibility page.	Add or change a resource's eligibility.
Manage Profiles - Overview	RS_ERES_OVERVW	Maintenance Management, Labor Administration, Manage Profiles Click the Overview tab.	Define additional employee information, an overview of the resource, and any of the resource's specialties.

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Page Name	Object Name	Navigation	Usage
Work Experience	RS_ERES_WORK_HIST	Maintenance Management, Labor Administration, Manage Profiles Click the Work Experience tab.	Add or modify a resource's work experience.
Work Experience	RS_WORK_HIST_EDIT	Click the Edit button in the Work Experience group box on the Work Experience page.	Modify the work history of a selected resource.
Delete Confirmation	EO_DEL_CONFIRM	Click the Delete button in the Work Experience grid.	Confirm the deletion of the work experience by selecting the Yes – Do Delete or select No – Do Not Delete.
Qualifications	RS_ERES_COMP_ACOMP	Maintenance Management, Labor Administration, Manage Profiles Click the Qualifications tab.	Add or modify a resource's qualifications.
Competencies	RS_CM_COMPTNCY	Click the Add/Update Competencies link in the Qualifications page.	Select additional competencies and interests that apply to a specific resource.
Education	RS_CM_EDU	Click the Add/Update Education link in the Qualifications page.	Add, modify, or delete degrees that apply to a specific resource.
Licenses and Certificates	RS_CM_LIC_CERT	Click the Add/Update Licenses and Certificates link in the Qualifications page.	Add, modify, or delete any licenses and certificates that apply to a specific resource.
Languages	RS_CM_LANG	Click the Add/Update Languages link in the Qualifications page.	Add, modify, or delete any languages that apply to a specific resource.
Professional Memberships	RS_CM_MEMBR	Click the Add/Update Professional Memberships link in the Qualifications page.	Add, modify, or delete any memberships to professional organizations that apply to a specific resource.
Honors and Awards	RS_CM_HNR_AWRDS	Click the Add/Update Honors and Awards link in the Qualifications page.	Add, modify, or delete any honors and awards that apply to a specific resource.
Test Results	RS_CM_TEST_RSLT	Click the Add/Update Tests link in the Qualifications page.	Add, modify, or delete any tests that apply to a specific resource.

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Page Name	Object Name	Navigation	Usage
Send Notification	PT_WF_NOTIFY	Click the Send Notification button in the Competencies, Education, Licenses and Certificates, Languages, Professional Memberships, Honors and Awards, and Test Results pages.	Send notification to interested parties about change in qualification.
General Info	RS_ERES_GEN_INFO	Maintenance Management, Labor Administration, Manage Profiles Click the General Info tab.	Add or modify a resource's information such as visa, work permit, passport, additional phones, and job information.
Resource Profile	RS_RES_PROF_RVW	Maintenance Management, Labor Administration, Manage Profiles Click the Resource Profile tab.	View basic resource information and add or modify contact information.
Craft	RS_CFTPROF_PG	Maintenance Management, Labor Administration, Manage Profiles Click the Craft tab.	Associate a resource with one or more crafts.
Shop	RS_RES_SHOP_PROF	Maintenance Management, Labor Administration, Manage Profiles Click the Shop tab.	Associate a resource with one or more shops.
"Resource's" Name - Gina Angelini	RS_RES_PROF_RVW	Maintenance Management, Labor Administration, View Profiles	Display a summary of a resource's profile information. You can click a link to access the Contact Information page and add contact information.
Contact Information	RS_RES_PROF_CONTCT	Click the Contact Information link on the View Profiles - "Resource's" Name (Gina Angelini) page.	Add contact information to an employee's profile.
Monthly Schedule - Resource Search	RS_SCHED_MONTHSRCH	Maintenance Management, Schedule Management, Resource Monthly Schedule	Search for a resource's monthly schedule.
Monthly Schedule	RS_SCHED_MONTH	Search for and select a resource from the Monthly Schedule - Resource Search page.	Review and modify assignments on a day per month basis.
Daily Schedule	RS_SCHED_DAILY	Click a date that has assignments on a the Monthly Schedule page.	Review and modify appointments on an hour per day basis.

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Page Name	Object Name	Navigation	Usage
Task Details	RS_SCHED_APPT	• Click an hour link on the Daily Schedule page. • Click an hour link on the Asset Daily Schedule page.	Add or modify an assignment for a specific day and time.
Asset Monthly Schedule	RS_ASSET_MONTH	Maintenance Management, Schedule Management, Asset Monthly Schedules	Review asset assignments on a day per month basis.
Asset Daily Schedule	RS_ASSET_DAILY	Click a date on the Asset Monthly Schedule page.	Review and modify assignments on an hour per day basis.
My Monthly Schedule	RS_SCHED_MONTH	Maintenance Management, Schedule Management, My Monthly Schedule	Review resource's own monthly schedule. **Note.** The Daily Schedule and Task Details pages are identical to the pages listed for the pages associated with the Monthly Schedule.

Setting Up Resource Groups

Access the Resource Group Definition - Resource Group Details page by clicking the Add button or Edit link.

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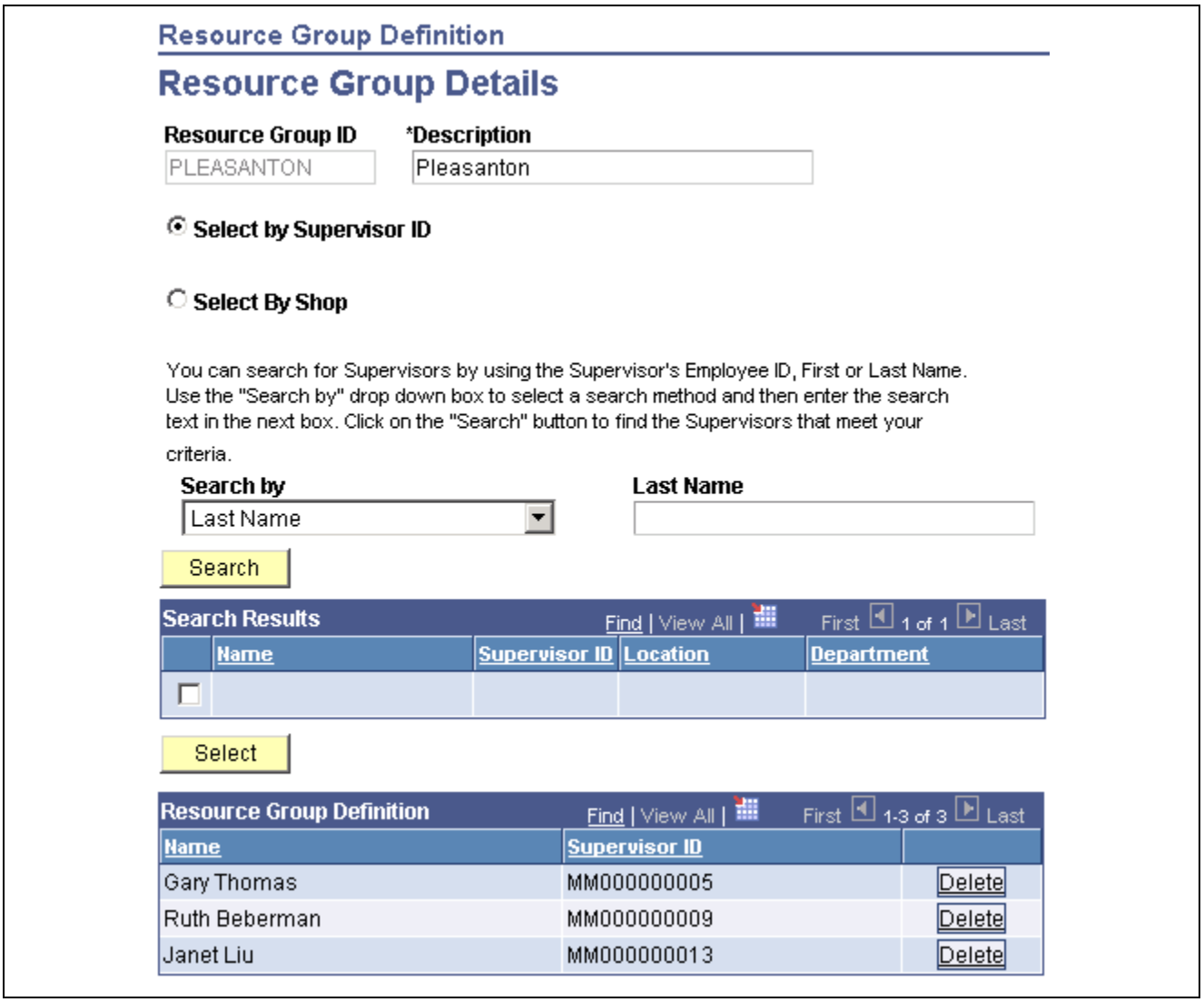

Resource Group Details page

Resource Group ID Enter a unique group identifier (15 characters). This is a required field.

Select by Supervisor ID Select this option to indicate that you want to set up the resource group based on resources identified as working for the specified supervisor.

Important! You must enter a supervisor on the Update Employee Data - Employee Job page for all resources before you can use resource groups that are based on a supervisor ID.

Search By Search for supervisors by using the supervisor's employee ID, or first or last name. Use the Search By drop-down list box to select a search method and then enter the search text in the next box. Click the Search button to find the supervisors that meet your criteria. Select one of these values from the drop-down list box:

- *Employee ID.*
- *Last Name.*

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- *First Name.*

Note. To search using characters within an employee name or ID, enter a wildcard (%), then enter any contiguous characters, and then enter another wildcard (%).

Select by Shop

Search for a shop by using the shop ID, shop description, location, or work order business unit. Use the Search drop-down list box to select a search method and then enter the search text in the next box. Click the Search button to find the shops that meet your criteria. Select one of these values from the drop-down list box:

- *Shop ID.*
- *Shop Description.*
- *Location.*
- *Work Order BU* (work order business unit).

Click the Search button to display the specific shop or one or more shops based on your search criteria. Then select the check box next to the shop (or shops) that you want to include in the resource group. All of the resources and tools assigned to each shop are part of the resource group and are used by the matching engine to narrow your search for either labor resources or tools needed when you assign resources to a work order task in a work order.

Assigning Resources to a Craft

Access the Assign Resources to Craft page.

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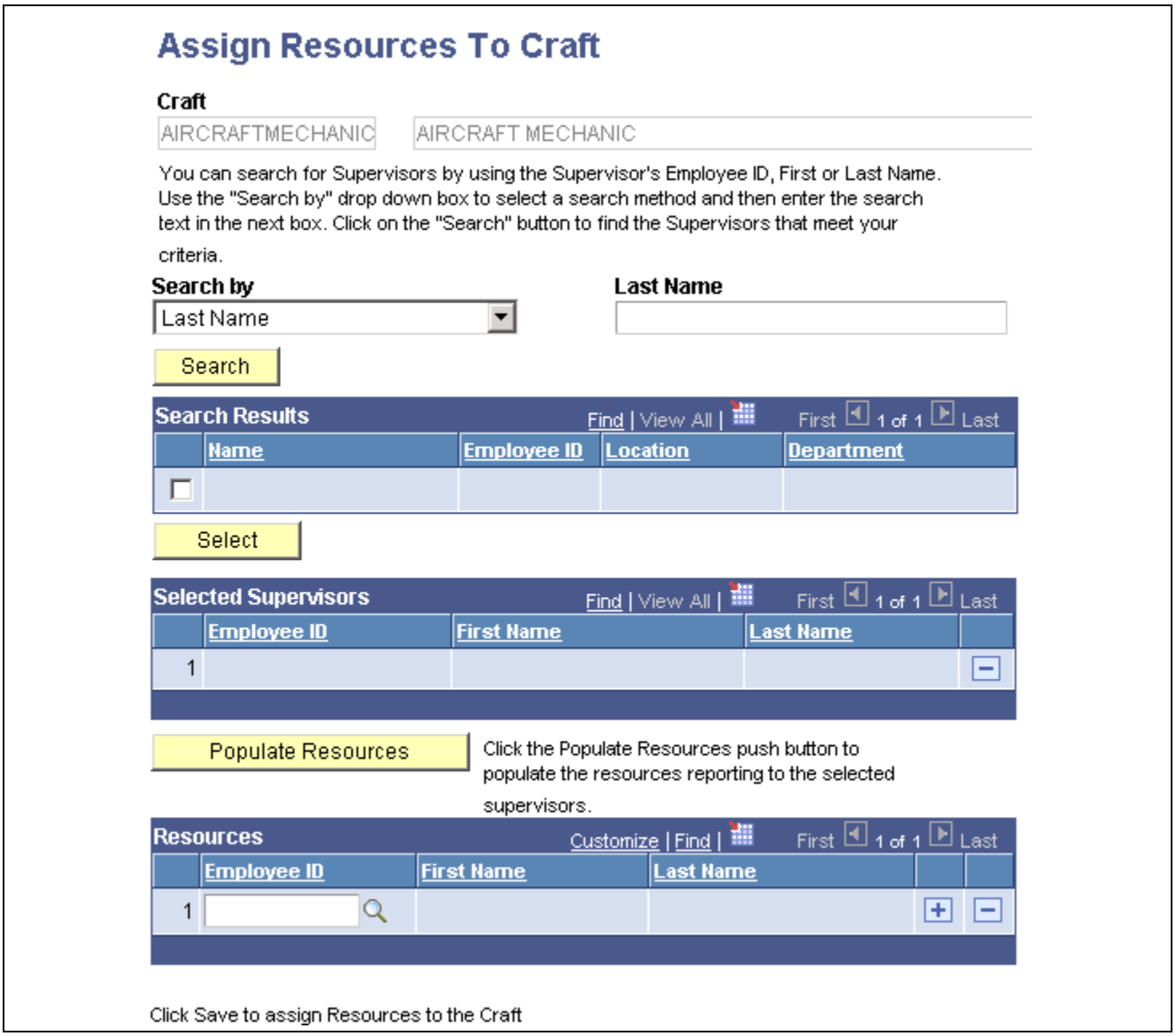

Assign Resources to Craft page

Search By Select either:

- *Employee ID*

  Selecting this value displays a field to the right in which you can enter an employee ID of a supervisor.

- *First Name*

  Selecting this value displays a field to the right in which you can enter the first name of a supervisor.

- *Last Name*

  Selecting this value displays a field to the right in which you can enter the last name of a supervisor.

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Note. If you leave these fields blank and click the Search button, a list of supervisor's names displays.

Search Click this button to display the supervisor's name and ID. If you did not enter the name or identification of a supervisor, a list of supervisors displays in the Search Results group box. Select the check boxes next to the name or names of the supervisors who are in charge of resources you want to assign to this craft.

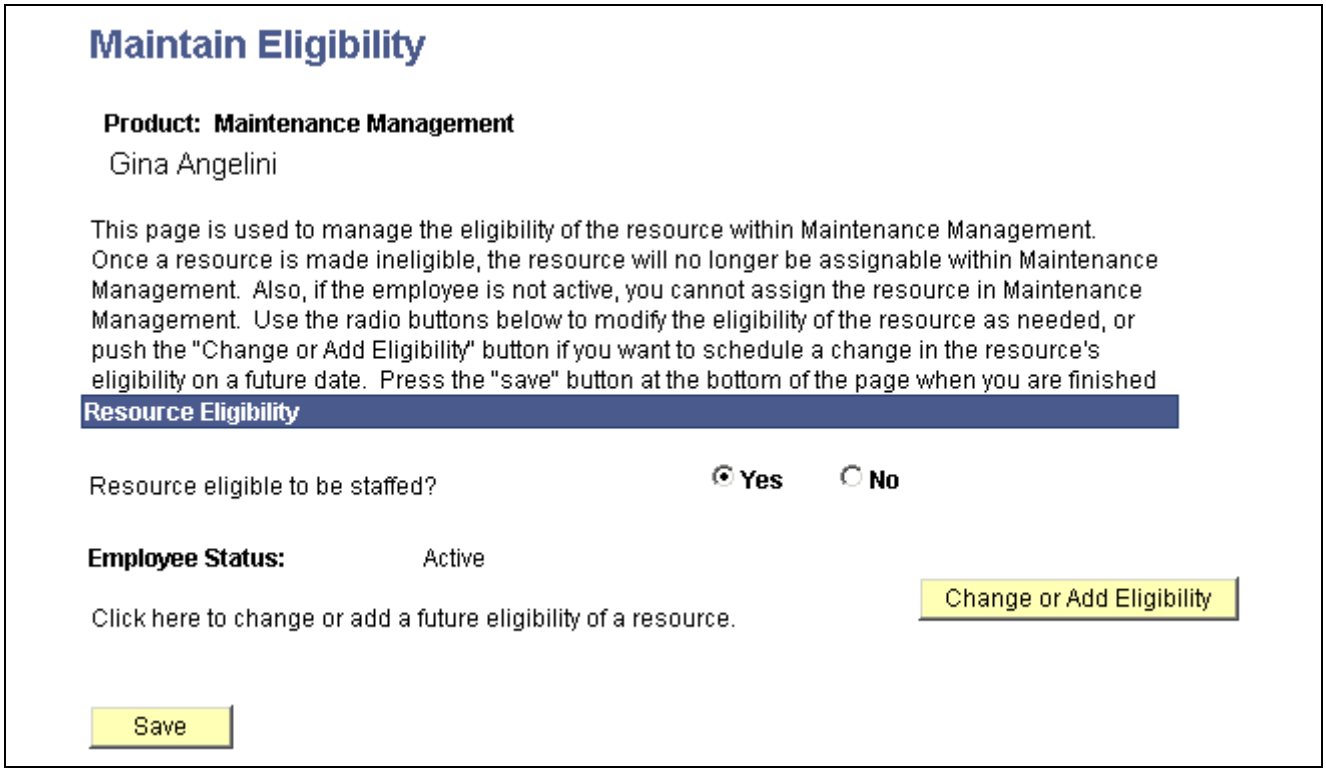
Select Click this button to list the selected supervisors in the Selected Supervisors grid.

Populate Resources Click this button to list the resources associated with the selected supervisors. The resources are listed by employee ID and a name in the Resources group box. You can delete resources that you do not want to assign to this craft. You can also add individual resources that you want to assign to this craft.

Save Click this button to assign resources to the craft and update each resource's profile with this craft.

Maintaining Resource Eligibility

Access the Maintain Eligibility page.



Maintain Eligibility page

Prior to entering this page, you must search for and select an employee on the Maintain Eligibility - Resource Search page.

Resource Eligible to be staffed? Select:

- Yes

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Select this option to indicate that this resource can be assigned to a work order or work order task. If a resource's status is inactive, the resource cannot be assigned.

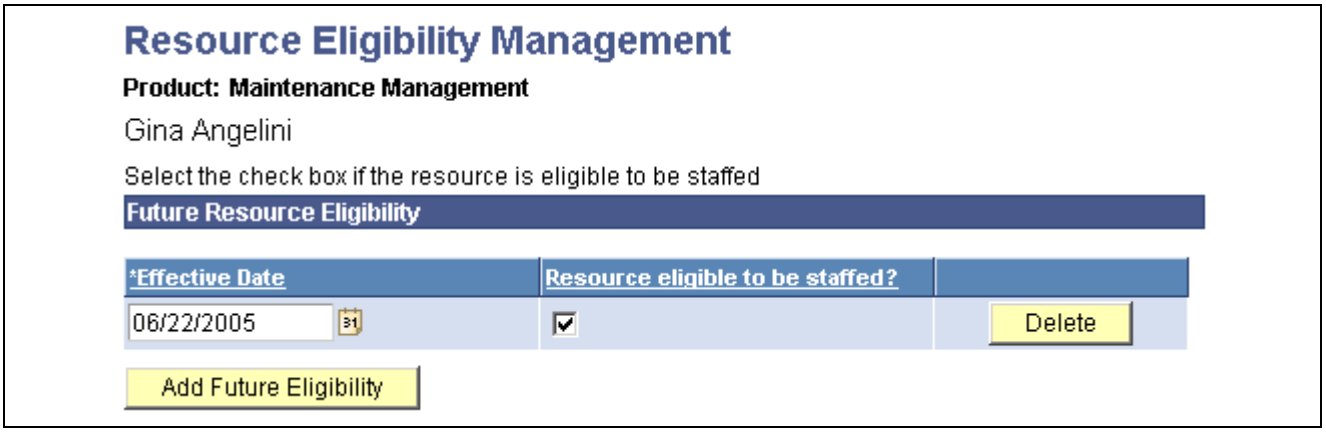
- No

  Select this option to indicate that this resource is not eligible to be assigned to a work order or work order task and is not considered when the Match Engine is run.

Change or Add Eligibility Click this button to access the Resource Eligibility Management page.

Adding or Changing Resources' Eligibility

Access the Resource Eligibility Management page.



Resource Eligibility Management page

Effective Date Select the date in which you want this employee to become eligible.

Resource eligible to be staffed? Select this check box if this resource is eligible to be assigned to a work order or work order task.

Add Future Eligibility Click this button to add another row to the Future Resource Eligibility grid. You can add several rows with different dates to indicate when the resource will be eligible for assignment in the future.

Maintaining Resources' Profiles

Access the Manage Profiles - Overview page for a selected resource.

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Manage Profiles - Overview page

Objective Overview

Enter or modify this resource's work objectives and background. You can reference skills, preferences, and strengths if you want. However, you can add or modify this information later in the profile.

Areas of Specialty

If you created a competency tree, it should appear in the Additional Resource Information group box. Click a competency in the competency tree and it adds it as a row in the Specialties group box.

Type of Specialty You can select whether a specialty is a:

- *Competency*

  This refers to a specific competency within a category, such as Analytical Thinking, Articulate and Concise, and more.

- *Category*

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This refers to an overall area of speciality such as Communication, Plumbing, Business Planning, and more.

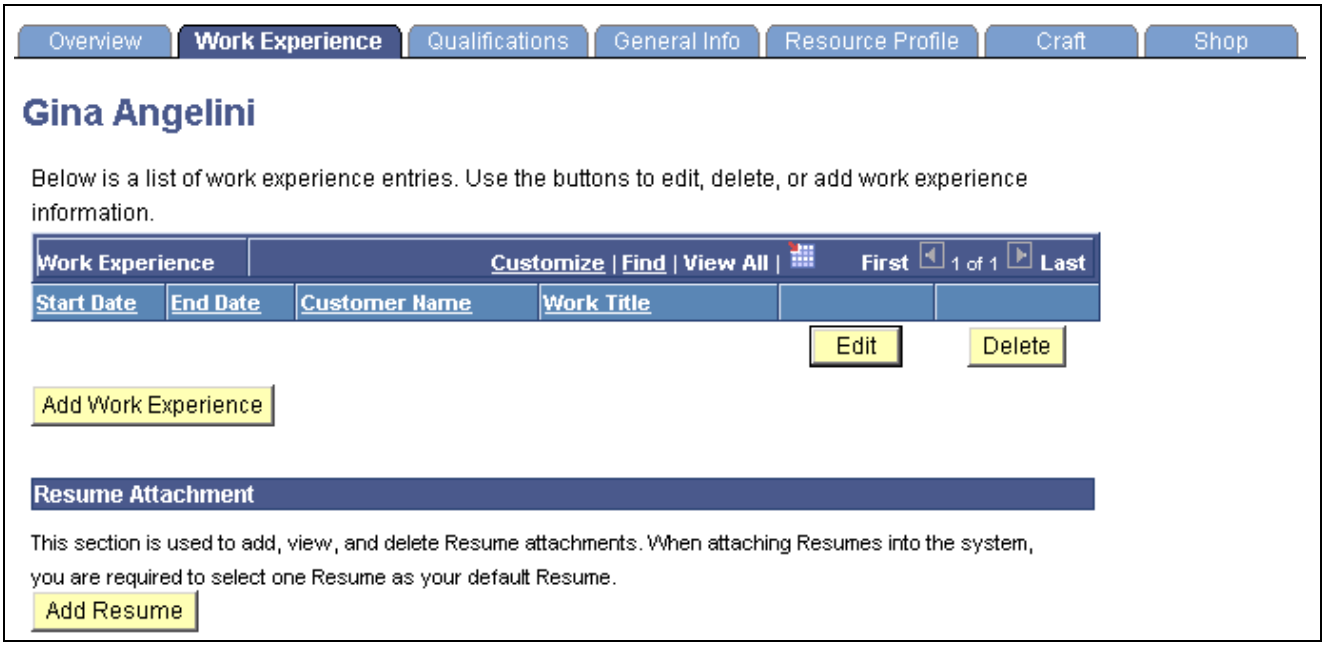
Worker Specialty Select the specialty from a list of competencies or categories, depending on the type of specialty that you selected.

Add Specialty Click this button to add a blank row to the Specialties group box list.

Note. Data that is captured in this page is for information only and is not used by the Resource Matching process.

Maintaining a Resource's Work Experience

Access the Work Experience page.



Work Experience page

Work Experience

You can edit or delete a resource's work experience.

Edit Click this button to access the Work Experience page for this resource, where you can modify the Start Date, End Date, Customer Name (name of company for which the employee worked or organization the technician supported), Work Title, and Work Description fields and click the Save button to save the changes.

Delete Click this button to delete a row of work history for this resource. A Delete Confirmation page displays where you can select one of the following buttons:

- Yes - Do Delete
- No - Do Not Delete

Add Work Experience Click this button to access a blank Work Experience page for this resource where you can add the Start Date, End Date, Customer Name (name of company for which the employee worked or organization the technician

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supported), Work Title, and Work Description values and click the Save button to save the changes.

Note. The work experience that you add here is used by the Resource Matching process and can be used by a user who evaluates candidates for an assignment.

Resume Attachment

Add, view, and delete resumes in this group box. You must select one resume as the default resume for this resource.

Add Resume Click this button to add a resume attachment.

Browse Click this button to search for the resume for this resource and select the resume that you want to attach to this profile.

Upload Click this button to upload the selected resume to this profile.

Default Specify the resume, if there are more than one, to use as the default by the Resource Matching process.

Delete Click this button to delete a resume from the Resume Attachment group box.

Note. Be sure to save the page.

Maintaining Resources' Qualifications

Access the Qualifications page.

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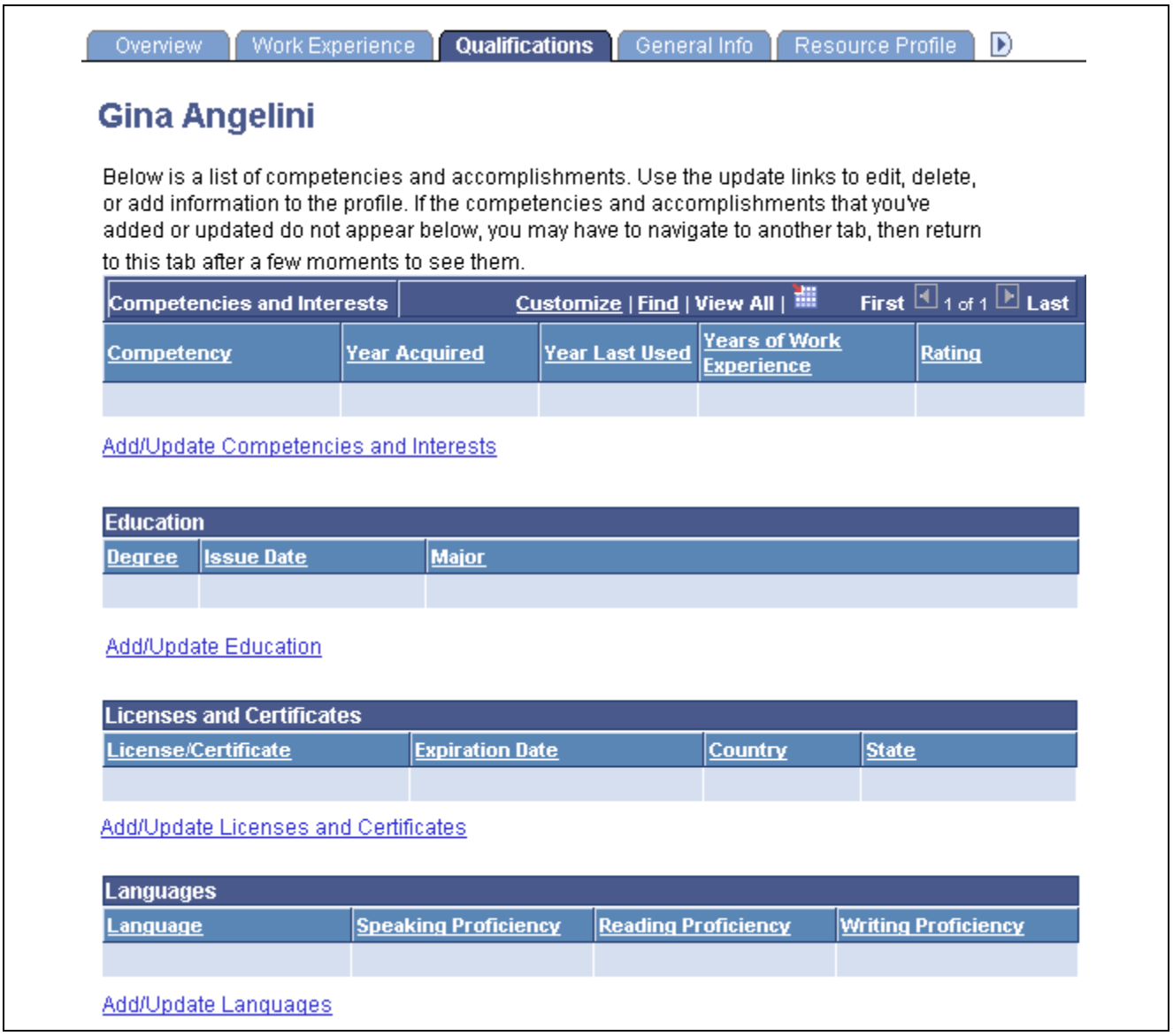

Qualifications (1 of 2) page

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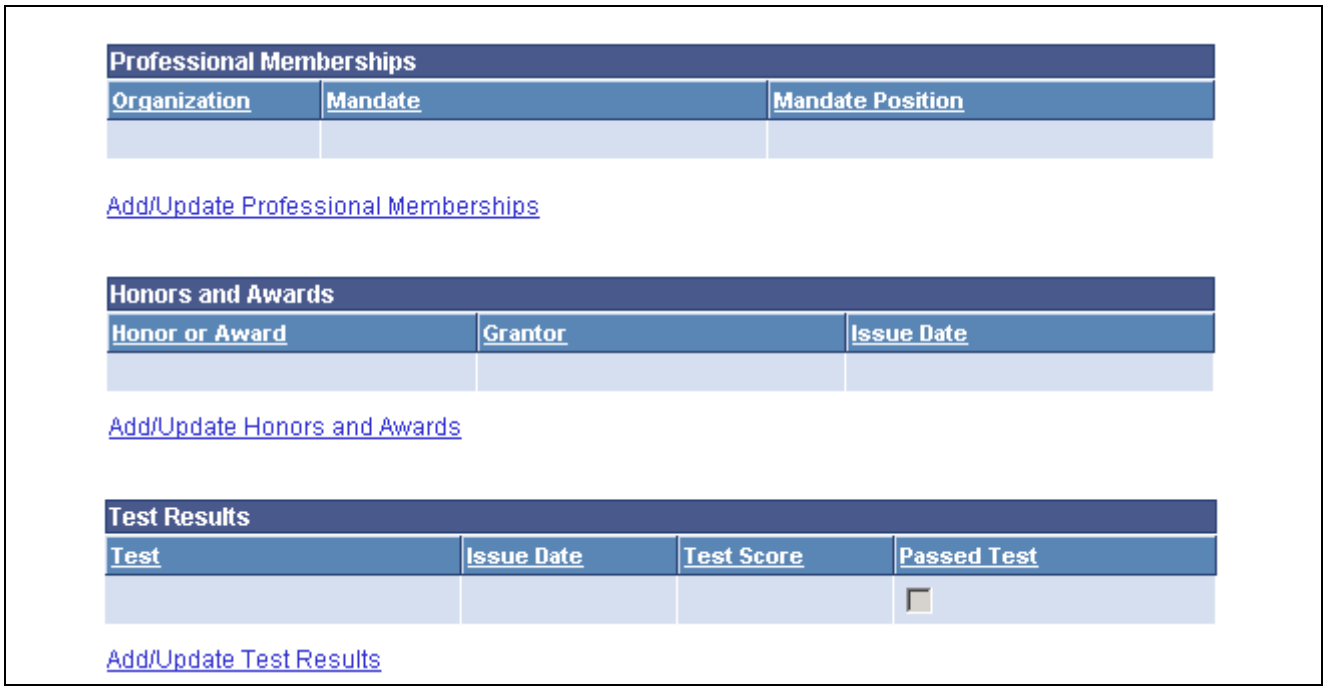

Qualifications (2 of 2) page

Competencies and Interests

Add/Update Competencies and Interests Click this button to access the Competencies page to associate additional competencies with this resource. This page simulates the Competencies page in the Qualification Profile component, except you do not have access to the competency tree.

See Chapter 8, "Setting Up Labor and Tools Resources," Adding Competencies, page 180.

Education

Add/Update Education Click this link to add, modify, or delete degrees applicable to this resource.

Licenses and Certificates

Add/Update Licenses and Certificates Click this link to add, modify, or delete licenses and certificates that apply to this resource.

Languages

Add/Update Languages Click this link to add, modify, or delete languages and language proficiency that apply to this resource.

Professional Memberships

Add/Update Professional Memberships Click this link to add, modify, or delete memberships to professional organizations for this resource.

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Honors and Awards

Add/Update Honors and Awards Click this link to add, modify, or delete honors and awards that apply to this resource.

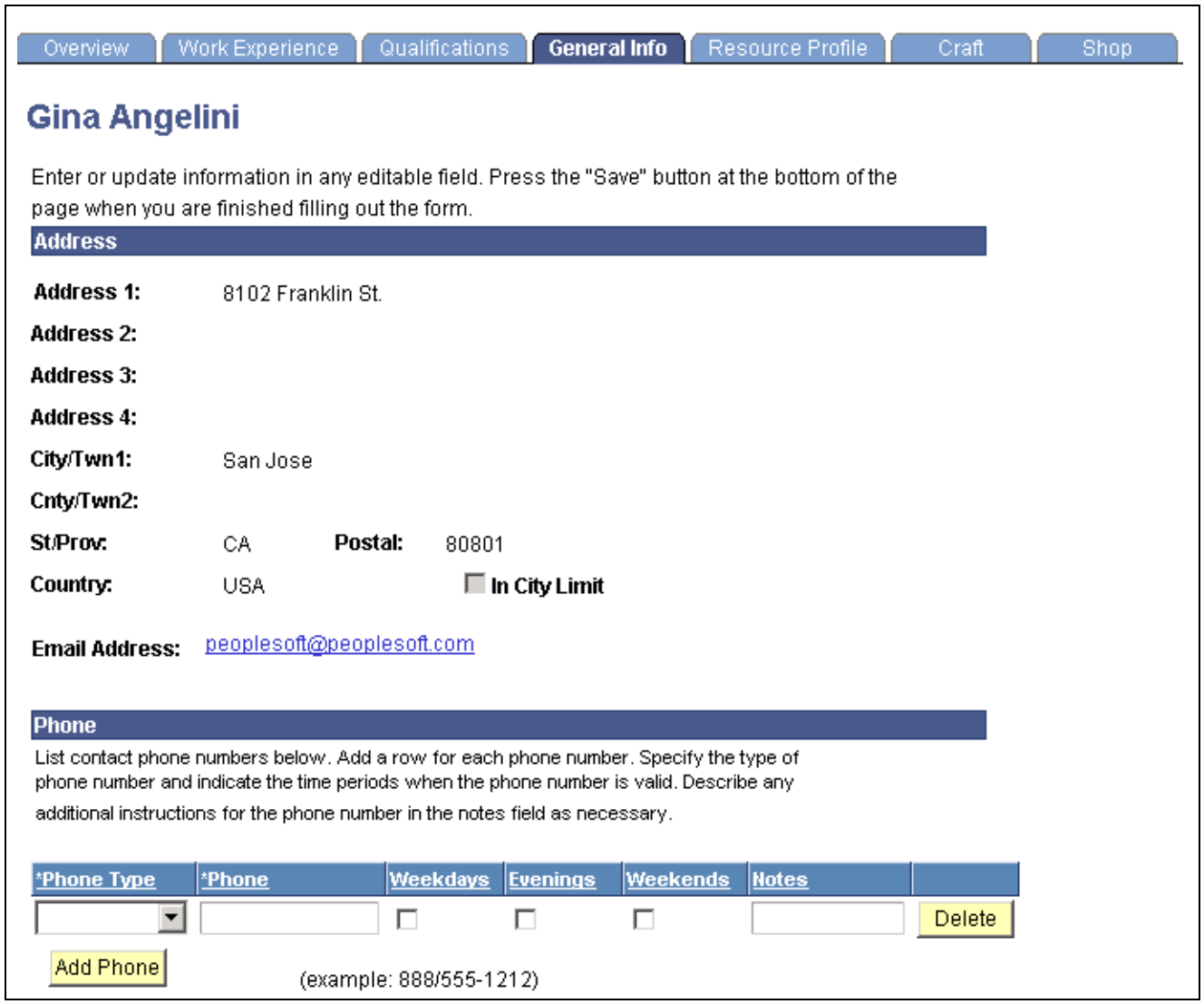
Test Results

Add/Update Test Results Click this link to add, modify, or delete tests and their associated results that apply to this resource.

Note. You can click the Notify button on each of the pages defined above to notify interested parties about this change if you select the Email Notification to Manager check box in Setup Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup, Common Installation Options page.

Maintaining General Information for Resources

Access the General Info page.



General Info (1 of 2) page

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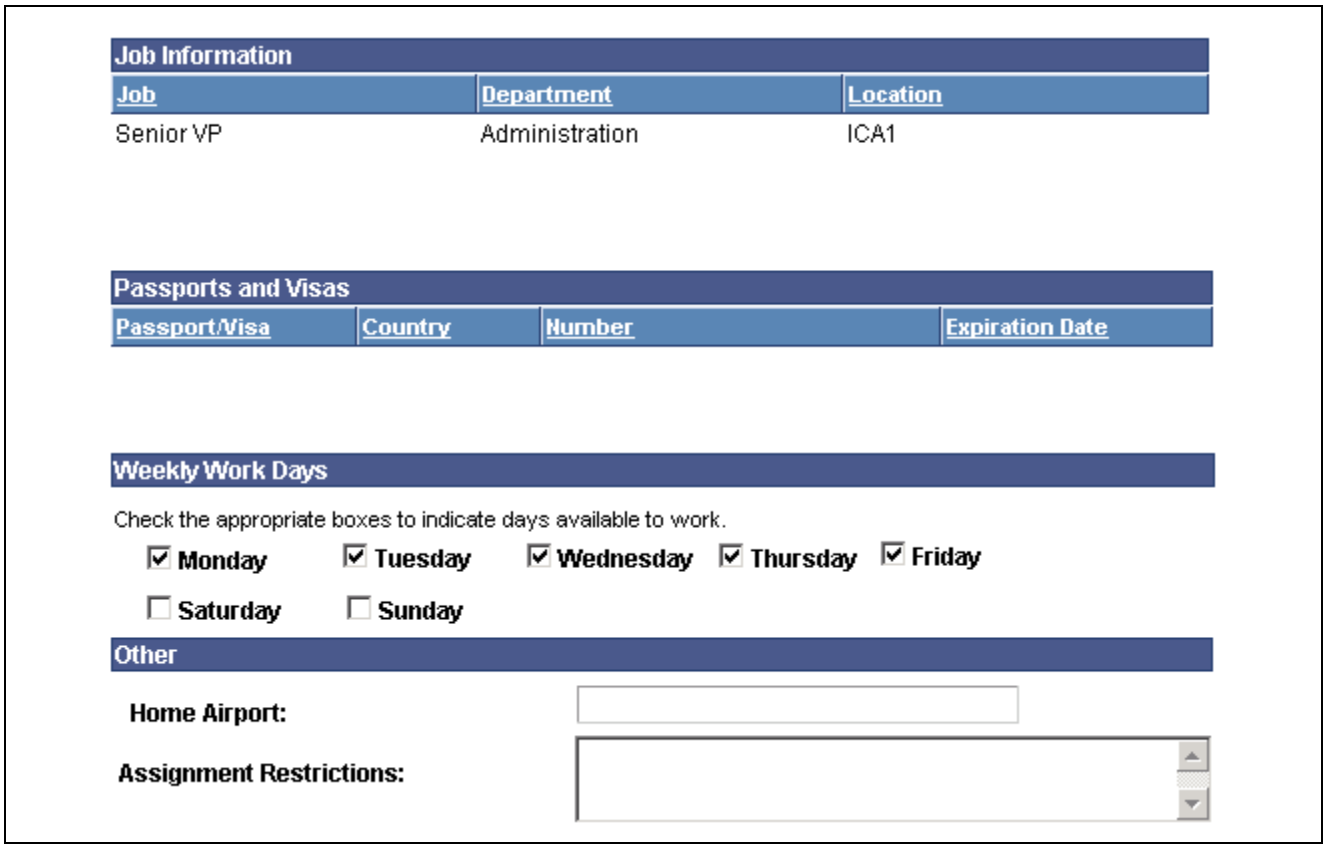

General Info (2 of 2) page

You can update some fields in this page. However, to update most of the fields, you must access the employee source database, either HRMS or PeopleSoft Maintenance Management's Manage Employee Data, and make the changes.

E-mail Address Click the resource's email address to create an email and send it to the resource.

Phone

Phone Type Select one for the following:

- *Alternate*
- *Business*
- *Home*
- *Mobile*
- *Other*
- *Pager*
- *Voicemail*
- *Work Site*

Phone Enter or modify the phone number.

Weekdays, Evenings, and **Weekends** Select the check box that applies to when the resource is available at this phone number.

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Delete Click this button to delete a phone row.

Add Phone Click this button to add another row and enter a selected phone type's information.

Job Information

This information comes from the employee data.

Passports and Visas

This information comes from the employee data.

Weekly Work Days

Select the work days that apply to this resource. The values that you select here override Default Work Days values set up in the Set Up Financials/Supply Chain, Common Definitions, Resources Data, Resource Setup, Common Installation Options page.

Other

Home Airport Enter or override an airport in this field.

Assignment Restrictions Enter or modify any assignment restrictions for this resource.

Reviewing Resource Profiles

Access the Resource Profile page.

Resource Profile page

This page consolidates the resource profile sections into a single, display-only format. A region appears on this page if it contains data for the resource.

Contact Information Click this link to access the (resource) Contact Information page to review phone information for this resource.

View Detail Click this link to view a detail list of the competencies that apply to this resource. Click the View Summary link to return to the summary view of the Resource Profile page.

Maintaining Craft Assignments for Resources

Access the Craft page.

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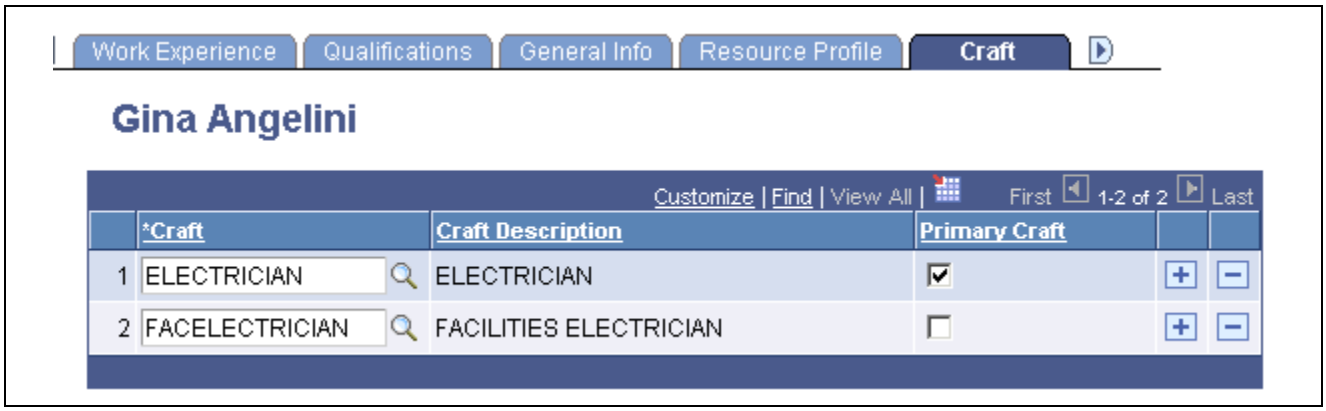

Craft page

Craft

Select a craft to apply to this resource. When you add a craft for a nonHCM employee and select the Save button, a page displays where you can elect to copy all the competencies and accomplishments associated to the qualification profile of the craft to this resource's profile. Competencies and accomplishments for employees listed in the PeopleSoft HCM database are updated in PeopleSoft HCM.

Note. Rows of crafts to which this resource is assigned are listed on this page.

Primary Craft

Select this check box if this is the primary craft for this resource. When you define a crew, and select this resource, this is the craft that is associated with the resource.

Note. If you leave this check box blank, the system uses the first craft in the list as the resource's primary craft in the crew definition.

Note. You can add multiple rows of crafts; however, select the Primary Craft check box for only one craft.

Maintaining Shop Assignments for Resources

Access the Shop page.

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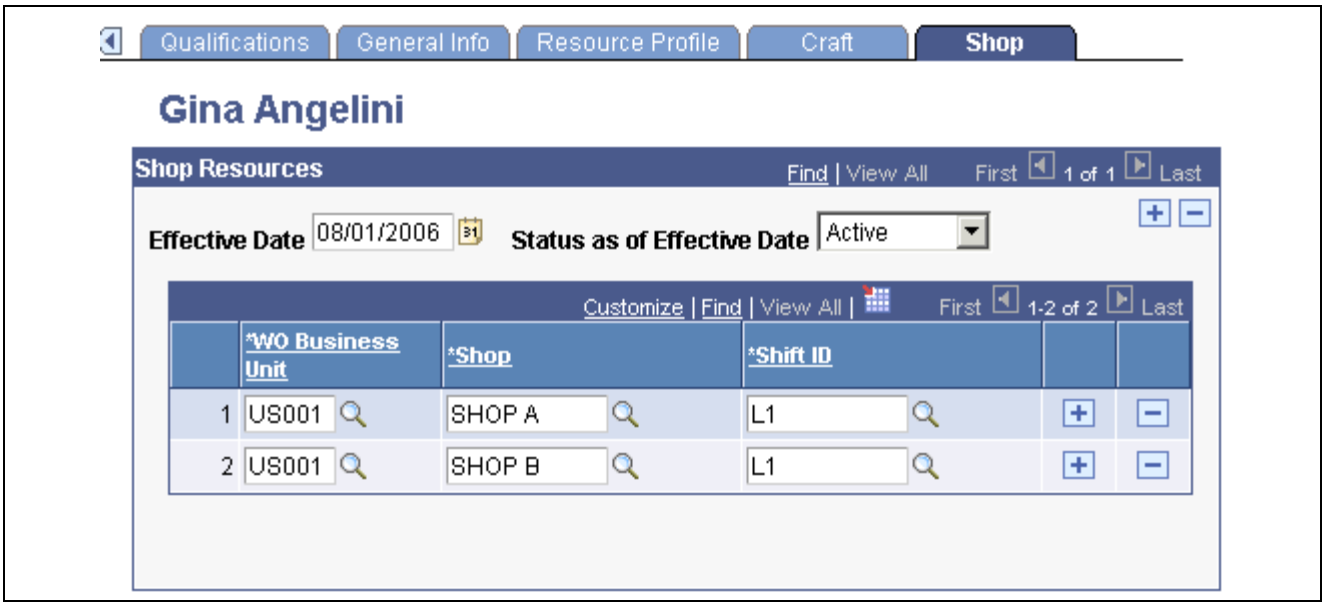

Shop page

Effective Date	Select the date from which the resources shop affiliation is either active or inactive.
Status as of Effective Date	Select if the resource's affiliation with this list of shops is *Active* or *Inactive* as of the selected effective date.
WO Business Unit (work order business unit)	Select the work order business unit associated with this shop.
Shop	Select a shop set up with the selected business unit.
Shift ID	Select a shift to apply to this resource when working from this shop.

Note. You can add multiple rows of shops based on an effective date and status. You can also add multiple rows of effective dates and associated shops to track the shop history and to change the shops based on a different effective date.

Managing a Resource's Monthly Schedule

Access the Monthly Schedule page.

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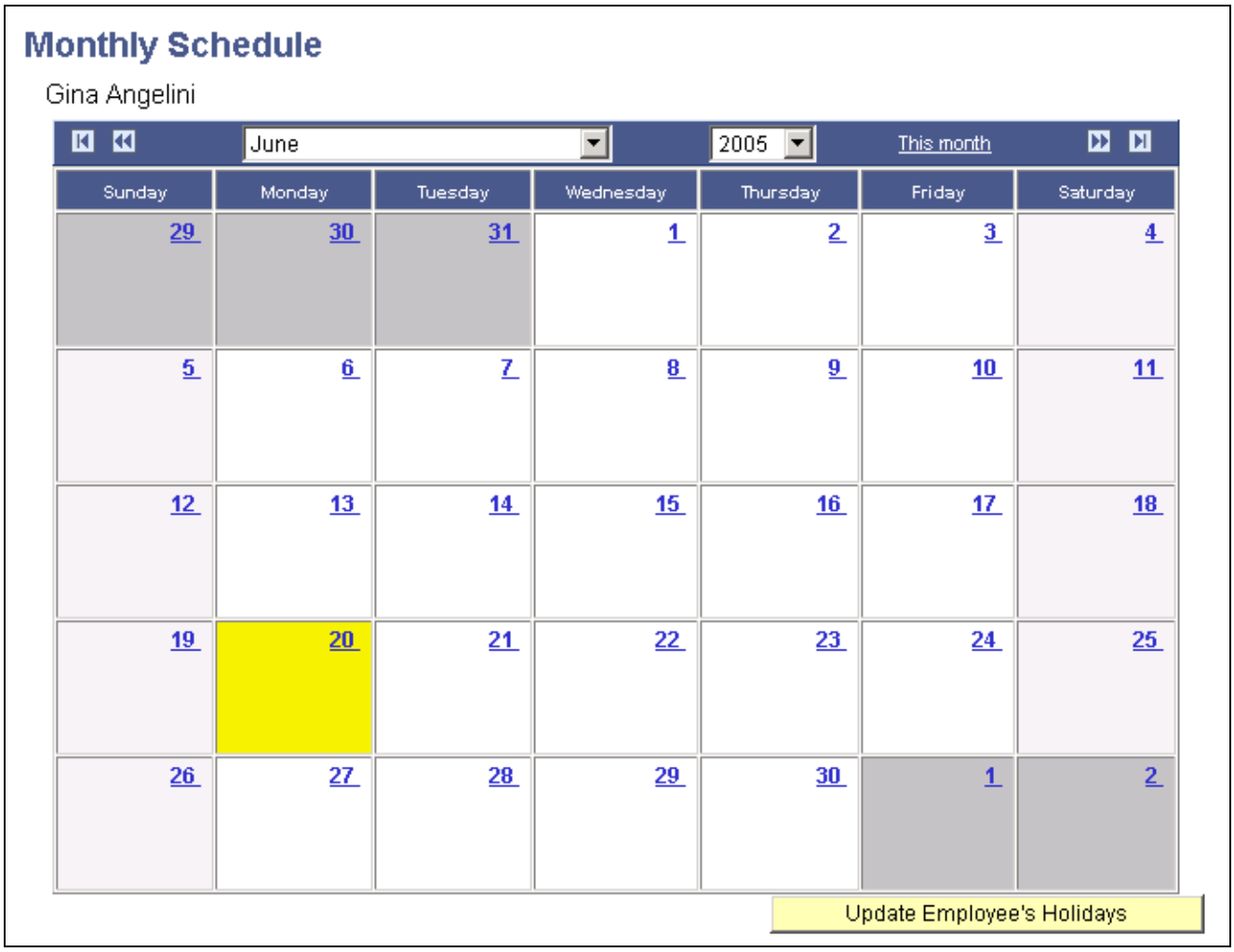

Monthly Schedule page

Review the assignments and scheduled days off for this resource. If a resource is assigned to work order task assignment, a link with the description of WO ID/ WO Task ID/ Task Description appears. Click this link to access either the Technician Workbench or the Work Order Component depending on how you set up Set Up Financials/Supply Chain, Common Definitions, User Preferences, PeopleSoft Maintenance Management page. If you click a work order task link on this page, the Schedules page in the Work Order component displays for the specific task.

This month Click this link to display the current system month if you the month displayed is different from the current month. The current month is the system default month.

Update Employee's Holidays Click this button to initiate the Holiday Load process to refresh holidays on the resource schedule. All of the holidays that are associated with the holiday schedule are inserted into the resource schedule as tasks with the task category HOLIDAY. The refresh process occurs in the background in real time. A message indicates when the process is complete.

Note. Click one of the date links in the month to access the Daily Schedule page.

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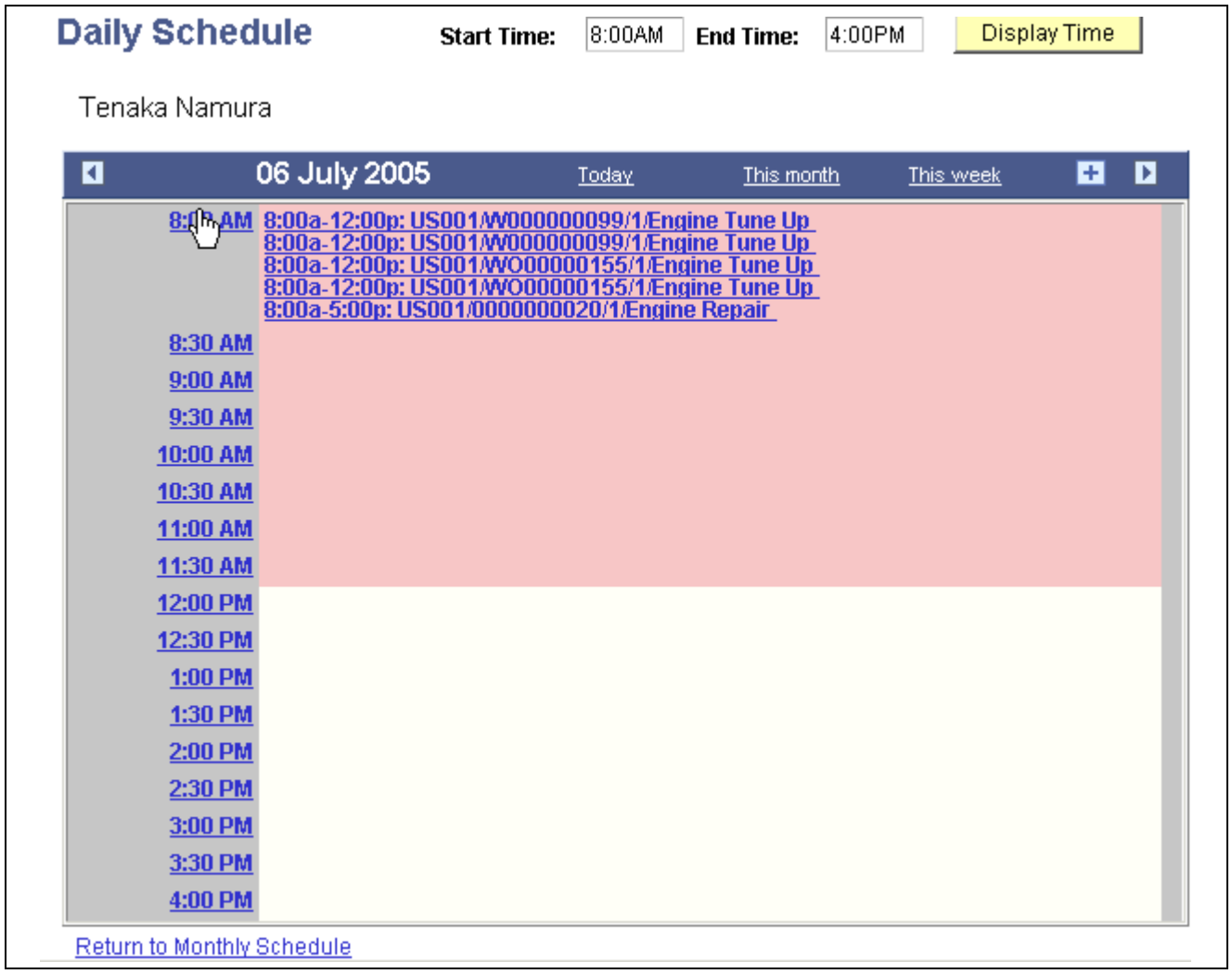
Important! The Asset Monthly Schedule page works the same way as the Resource Monthly Schedule page. However, the Asset Monthly Schedule page does not have an Update Employee's Holidays button.

Reviewing a Resource's Daily Schedule

Access the Daily Schedule page.



Daily Schedule page

Review the selected daily schedule for this resource. Click an hour or click a task to add or modify task details. When a resource is assigned to a work order task, a hyperlink displays with the description, which includes the time range/work order business unit/ work order ID/ work order task ID/ task description. If you click this link either the Technician Workbench or the Work Order component displays depending your setup in Set Up Financials/Supply Chain, Common Definitions, User Preferences, PeopleSoft Maintenance Management page.

Important! You access the Daily Schedule page by clicking on a date that has assignments. If a schedule does not have assignments, when you click on the date, the Task Details page displays.

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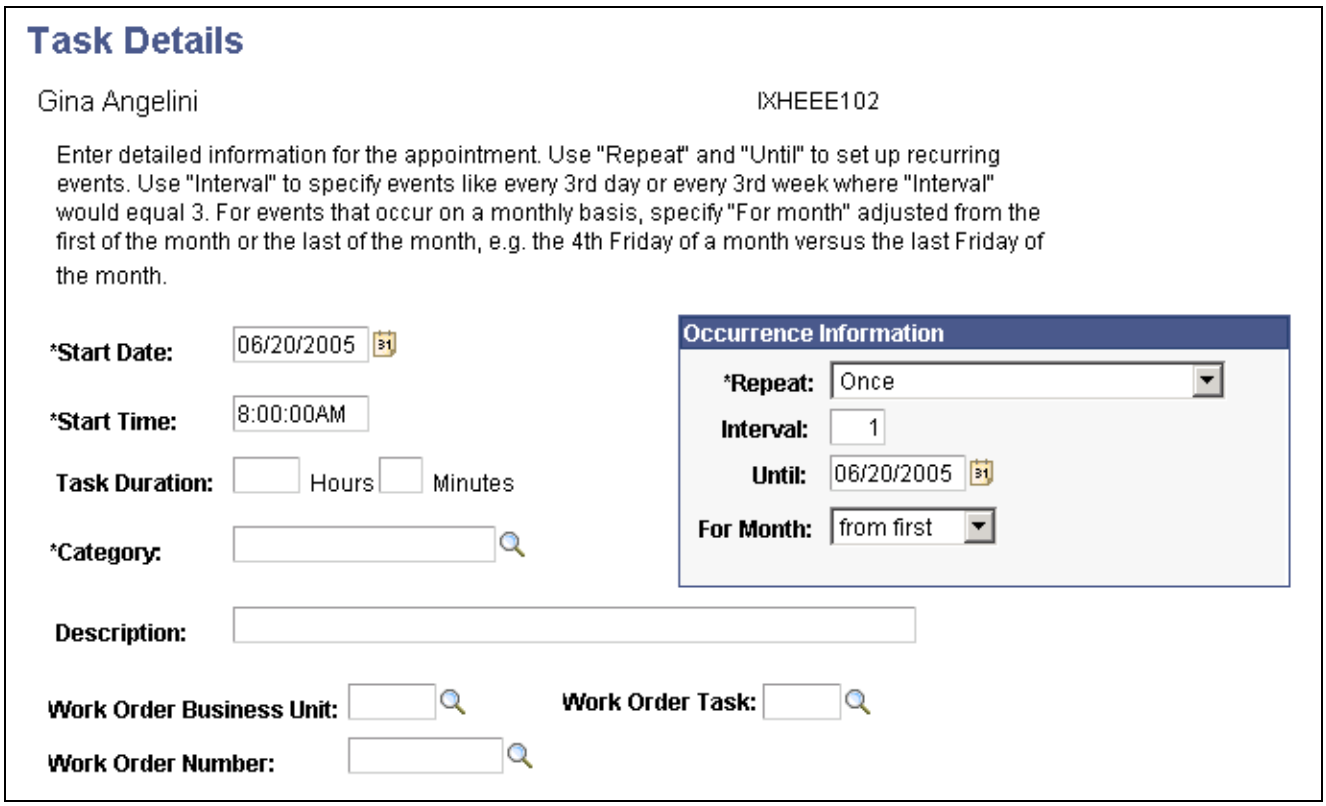
Adding or Modifying Task Details for Resources

Access the Task Details page.



Task Details page

Start Date and **Start Time** — Enter a different date and time, if desired.

Note. The date and time are based on the date and time link that you clicked on the Daily Schedule page.

Task Duration — Enter the total time for this resource to perform this task.

Category — Select the task category that applies to this period of time.

See Chapter 8, "Setting Up Labor and Tools Resources," Setting Up Task Categories, page 176.

Work Order Business Unit, Work Order Number, and **Work Order Task** — Select these values to identify downtime on the calendar for the asset being repaired or maintained in a work order task. This is a manual process.

Important! The Asset Task Details page contains the same fields as the Resource Daily Schedule page.

Occurrence Information

Repeat — Select a value that defines how often you want this task category repeated in the resource's schedule. The values are:

- *Daily.*

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- *Monthly by Date.*
- *Monthly by Day.*
- *Once.*
- *Weekly.*
- *Yearly.*

Interval Enter the number of intervals between occurrences of the event.

Until Select the last date that the event should occur.

For Month Select one of these values:

- *from first.*

  For example, the event will occur on the fourth Friday of the month counting from the first Friday forward.

- *from last.*

  For example, the event will occur on the last Friday of the month.

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CHAPTER 9

Defining Work Order Templates

This chapter presents an overview of work order templates and discusses how to set up work order templates in Oracle's PeopleSoft Enterprise Maintenance Management.

Understanding Work Order Templates

Organizations often repeat the same work order activities, which follow a standard sequence of events. PeopleSoft Maintenance Management provides work order job and work order task templates, which enable you to predefine work order task resources and requirements that are common to various types of work orders. Each template is essentially a predefined job plan for a particular maintenance or repair operation or task. If a work order requires several tasks to complete the job, you can create a job template, which contains multiple predefined work order tasks that are organized as job steps and applied to the entire work order. You can also apply task templates to individual tasks in a work order. These templates are designed to enable you to reuse them in more than one work order, thus reducing work order entry time.

Characteristics common to the setup of both work order job and work order task templates include the use of:

- A setID, which enables users to use this template across multiple work order business units.

  Work order task and job templates reference setID-based data from multiple subsystems. This means that you must be able to set up and subsequently access or reference combinations of this data to work with the various work order business units that use the templates. When you copy a template to populate data on an actual work order, the entire set of task requirement data that is copied—Labor, Inventory, Purchase/On-hand, Tools—must be compatible with the work order business unit for which the data is being entered. Tools are set up as assets in PeopleSoft Asset Management by business unit. However, each Asset Management business unit is a set control value which determines the setID used for each record group in the system.

  You use setID mapping to coordinate the setIDs for the various set control record groups, which provide data for the templates. There are basically four record groups that must be synchronized to work correctly with the templates and the work order, which include: WM_01 for Job and Task Templates, PCR codes, and PeopleSoft Maintenance Management definitions; FS-18 for Item Master and Manufacturing - Model definitions; RS-02 for Labor and Crafts, and AM-15 for Asset Subtypes.

  You should also map each job or task template setID (from WM_01) to the same FS_18, RS_02, and AM_15 setIDs, which are the same as the work order business unit set control values. For example, if you mapped WO BU US001 to WM_01 SHARE, FS_18 SHARE, RS_02 SHR01, and AM_15 SHARE, then you should also map the set control SHARE to FS_18 SHARE, RS_02 SHR01, and AM_15 SHARE. Any work order business units for which you want to share templates among should follow this pattern.

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Ideally, you should always map set control for AM_15 which controls table AM_SUBTYPE and FS_18 which controls table MFG_MODEL to the same setID (SHARE). This prevents a situation, for example, in which AUTO is a valid Asset Subtype for the SetID, but FORD, TOYOTA, and more are not set up as corresponding Manufacturer IDs for the same setID. The solution for any mismatches is to simply add the missing codes to one side or the other, effectively forming a *superset* of codes which work as if you had a single common setID.

Important! Unless your organization has compelling business reasons to partition this dependent system across multiple setIDs, it is highly recommended that you use a single generic setID such as SHARE to organize the job and task templates and all underlying subsystem data.

- Effective-dating, which enables you to change the status of the templates from active to inactive and vice versa, as well as update the data based on a specified date.
- A link for each type of template in the work order to enable you to copy the requirements and data directly into the work order.
- Specific combinations of asset classification parameters—asset type, subtype, manufacturer, and model—which enable you to reuse the template in work orders and work order tasks where the asset being maintained or repaired falls within these classification parameters.
- Optional association with a combination of problem, cause, and resolution codes (PCR) to enable users to easily locate the most suitable template to apply to a work order task to bring about the intended resolution.

Note. Selection of these PCR codes is optional in either of the templates.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," SetID Considerations in PeopleSoft Maintenance Management, page 68.

See Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," page 125.

See Chapter 14, "Creating a Work Order," Creating a Work Order, page 382.

Work Order Task Templates

To reduce data entry time, users can set up work order task templates. These templates enable users to predefine the resource requirements and associated data for each line of a work order task. When you create a work order and one or more work order tasks, you can click the Task Template link for a specific work order task on either the work order's Requirements page or the Schedules page. This enables you to access a Task Template Search page where you can search for a work order task template based on your data specifications. You select the template that you want to apply to a specific work order task line.

Note. When you click the Task Templates link for a specific work order task, the system copies the task template data to the rows for that specific task. The task to which the task template data is copied can be a new task with no data entered, or it can be a task that already has some data entered. However, selecting a template for a task does not add a new work order task.

For example, you can set up a work order task template to change the oil in an organization's fleet of automobiles. The information on the work order task template includes:

- Resolution Code = OILCHANGE: Drain and replace engine oil.
- Labor requirements = 1 mechanic for 1 hour.
- Inventory requirements = Hotwire set.
- Items that need to be purchased = 5 quarts of Motor Oil SAE10-40W and 1 Oil Filter BJZ-1200.

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- Instructions: 1) Remove oil pan nut/washer assembly.
- Checklist: 1) Before task, do work site safety inspection. 2) After task, dispose of used oil in hazardous waste oil recycle container and add label with contents, date, and time of change.
- Notes: SAFETY — Read attached safety plan.
- Attachments = Safety plan.

The work order task template enables you to:

- Optionally specify asset classification parameters. If you do not select any asset classification parameters, the template is considered a non-asset template, which means that the template is not associated with the maintenance or repair of any particular kind of asset. The work order task operation is either not associated with any asset, or the operation is so generic that it can apply to any and all assets that you are working on. For example, you could set up a separate task template, for cost tracking purposes, for the operation of filing a follow-up regulatory report. This kind of task is common to a large variety of maintenance and repair situations.
- Optionally specify labor resource requirements based on the craft and the qualifications needed to perform the specific task.

  You can use existing qualifications for the craft and add any qualifications that are also needed to perform the task. The template's Labor Requirements fields exactly match the fields that are in the Labor Requirements - Details tab in the work order's Requirement's page.
- Optionally specify the inventory items from Inventory's Item Master table that are needed to perform this work order task.

  The template's Inventory Requirements fields correspond to the fields that are in the Inventory Requirements - Details tab on the Requirements page for the work order.

  You can also click the Equipment Parts List (EPL) button, which is only enabled if one or more EPL parts templates exist in the asset repository for the asset classifications in the work order task template's header. The EPL enables you to quickly find an item that you need to use to repair or maintain an asset instead of searching for it in the Item Master. When you select this button, the system displays a list of inventory parts and supplies that are commonly used to maintain and repair the asset. You select the items and then select a button that copies the item information to the template's Inventory item lines. When the work order task template is copied to the work order, the system will not copy any inventory items specified in the template that are not available to work order's work order business unit and the Inventory business unit specified in the work order business unit.

Note. To select inventory items from the Item Master table, you must install PeopleSoft Inventory. To select noninventory items from the Item Master Table that are either on-hand or must be purchased, you are not required to install PeopleSoft Inventory. If you do not install PeopleSoft Inventory, the Inventory link in the work order task template is not available for selection.

- View the display-only Item SetID in the Inventory and Purchase/On-hand Requirements grids, and the Craft SetID in the Labor Requirements grid.
- Optionally specify the noninventory materials, tools, and labor services that either require purchasing using a requisition or purchase order or are currently on-hand or readily available.

  The template's Purchase/On-hand Requirements fields correspond to the fields that are in the Purchase/On-hand Requirements – Details tab in work order's Requirement's page.

  You can also select the EPL button to look for noninventory items that need purchasing or are on-hand in your shop. This works just as it does for inventory items.

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- Optionally specify the asset type and asset subtype that apply to the tools needed to complete the work order task.

  The template's fields in the Tool Requirement grid correspond to the fields that are in the Tool Requirements - Details tab in work order's Requirement's page.
- Optionally add a list of operational instructions that are used to direct the work order task's activities.
- Optionally create a checklist that defines specific required and non-required activities to perform before, during, and after the work order task. The technician may be required to check these activities off during the execution of the work order.
- Optionally add notes that are relevant to the performance of the work order task.
- Optionally add attachment files, including html files, which enable you to access designs, schematic drawings, and other information that are relevant to the work order task.

You click on the Task Templates link in the work order to search for a task template to copy to a work order task. If you already specified a valid asset for the work order task, the system lists the work order task templates that have asset characteristics that correspond to the asset in the work order task. You select the template that most readily applies to the work order task. If you did not specify an asset in the work order task line, then you can select it, as well as specify PCR parameters, in the Search page, if desired and copy this information to the work order task. You can also select the Include Non-Asset Templates check box in the Search page for the system to look up non-asset related templates as well.

Before copying the task template data to the work order task, the system verifies the setID compatibility with the setID used to create the work order business unit. It also determines the insertion point in the work order task and increments a new task number. The required start and end dates and times that display in a work order task are default values from the work order. The task template copy functionality does not compute the task duration information in the template based on these values. You can override the data that is copied from the template to the task.

Work Order Job Templates

A work order job template is a collection of task templates that are needed to complete a job. The work order job template is applied at the header level of a work order. This template is used to apply common data and requirements to a work order that requires more than one task or job step. It is possible to use a work order job template to populate the requirements and associated data for an entire, multistep work order. You must create the appropriate work order task templates that apply to the work order before you can set up the work order job template. You then attach each work order task template as a job step in the work order job template. If you specify the asset categories in a work order job template's header, the system uses them to search for compatible work order task templates to associate with the job template. The work order job template enables you to sequence each job step, indicate whether one step depends on another step, and enter the percentage that these dependent job steps overlap each other.

The system enables you to share these job templates (like their component task templates) across multiple business units, use effective dating to allow for data changes, and to apply them to categories of equipment assets. When you set up and save a job template, the system checks cross setID compatibility between the component task templates. This compatibility is rechecked when you click on the Job Templates link in the work order and copy the job template to a work order.

As an example, you can set up a work order job template called FL_AUTO_3KSERV – Fleet-Auto: 3000 mile service and include these details:

- Asset Type and Subtype: Fleet and Auto.
- Effective Date: 04/01/2005 Status: Active.
- Duration: 3 hours.

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- Job Steps:
  1. Sequence Number: 1

     Work Order Task Template: FL_AUTO_OILCHG – Fleet-Auto: Oil Change.
  2. Sequence Number: 2

     Work Order Task Template: FL_AUTO_FFCOOL – Fleet-Auto: Flush-Fill Coolant.
  3. Sequence Number: 3

     Work Order Task Template: FL_AUTO_TIREROTATE – Fleet-Auto: Rotate Tires.

. To apply job templates to a work order, you create a work order and click the Job Templates link on the Work Order header page to display the Job Template Search page. The default Asset Management business unit is derived from the value specified in the work order business unit associated with the work order. You can identify the asset in the work order and selected asset displays on the search page. If you do not select an asset on the work order, you must select an asset on the search page to display the asset classifications of asset type, subtype, manufacturer, and model, and to enable you to search select an asset-related problem group and the group's subsequent PCR codes. You also can search for non-asset related templates by selecting the Include Non-Asset Templates check box on the search page. If you do not select an asset in the work order and bring up the search page, this check box is preselected. You can unselect the preselected check box. The system matches those criteria and lists the number of templates that match the search.

Asset selection in the header of the Work Order page or on the Job Template Search page, produces different results, which include:

- If you select an asset in the header of the Work Order page, the Asset Management business unit and the selected asset ID display as default values in the Job Template Search page along with any applicable asset characteristics, which remain disabled. Asset selection either in the header of the Work Order page or the Job Template Search page can have the one of the following effects:
- If you do not specify an asset in the header of the Work Order page, you can select an asset in the Job Template Search page and the system copies the selected asset to the asset field in the header of the Work Order page.
- If you specify an asset (asset 1) in the header of the Work Order page and override the asset (asset 1) with another asset (asset 2) in the Job Templates Search page, the system searches for job templates associated with asset 2.

  When you select the appropriate job template for the work order, the work order tasks associated with that template are copied to the work order for asset 2. However, the original asset (asset 1) in the work order header does not change.

  If you left the asset field on the work order header blank, the asset that you select on the search page is copied to the blank work order header field.

You specify a Resolution Code when you set up job templates and task templates. This enables you to search for a job template by specifying problem, cause, and resolution (PCR) data. However, if you modified the PCR data used in the search, you must select the Copy PCR Criteria to Tasks check box on the Job Template Search page before the system will copy the PCR data to all the tasks identified in the job template. You can also select the Include Non-Asset Templates check box on the Search page for the system to look up non-asset related job templates on the Job Template Search page.

When you want to add a single task template to a work order, you can select the Task Templates link on a task page to display the Task Template Search page. When you select the Copy PCR Criteria to Tasks check box on this search page, the system only copies the PCR data specified on the search page to that single task.

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When the work order job template is copied to the work order, the system verifies that the template contains at least one valid job step. If you copy a work order job template into a work order that has existing task lines, the new task lines are always inserted at the end of the existing task lines. For example, if you are doing a corrective radiator repair on a vehicle and performing a multistep coolant system maintenance, including flushing/filling new coolant fluid, and these tasks are conveniently bundled in a job template, you append the new job template tasks to the radiator repair task that you previously entered manually.

Note. Sequence numbers on the work order job template steps enable the job steps specified in template to be copied in the in the sequence they are listed. When Job Template steps are inserted into a work order job template, the default values of the sequence numbers are automatically assigned in increments of 10 (10, 20, 30). Users can override these sequence numbers (for example, change sequence numbers for steps from 10, 20, 30 to 1, 2, 3). Even if users override the sequence numbers, the next auto-assigned sequence number for a newly-inserted job step will be in increments of 10. For example, if the user changes the sequence numbers of the first three job steps to 1,2,3, then the next auto-assigned sequence number for a fourth job step will be 40. When a work order is created, the sequence numbers of the job steps are copied into the work order as they currently exist in the job template. If the user overrides the auto-generated sequence numbers in the template, then the overridden sequence numbers are copied to the work order.

Preventive Maintenance Work Order

Work order job templates are particularly useful for creating preventive maintenance work orders, which consist of routine maintenance activities that require the use of the same or similar resources and other requirements. You apply a work order job template in the preventive maintenance schedule definition, which is applied when the work order is created by the Preventive Maintenance (WM_PM) process. You can also create a work order for a single task preventive maintenance operation by associating a single step work order job template to a preventive maintenance schedule.

See Chapter 12, “Setting Up and Generating Preventive Maintenance Work Orders,” Understanding Preventive Maintenance Work Orders, page 283.

Setting Up Work Order Templates

To set up work order task templates, use the Work Order Task Template (WM_WO_TASK_TMPLT) component.

To set up work order job templates, use the Work Order Job Template (WM_WO_JOB_TMPLT) component.

This section describes how to:

- Set up a work order task template.
- Set up a work order job template.

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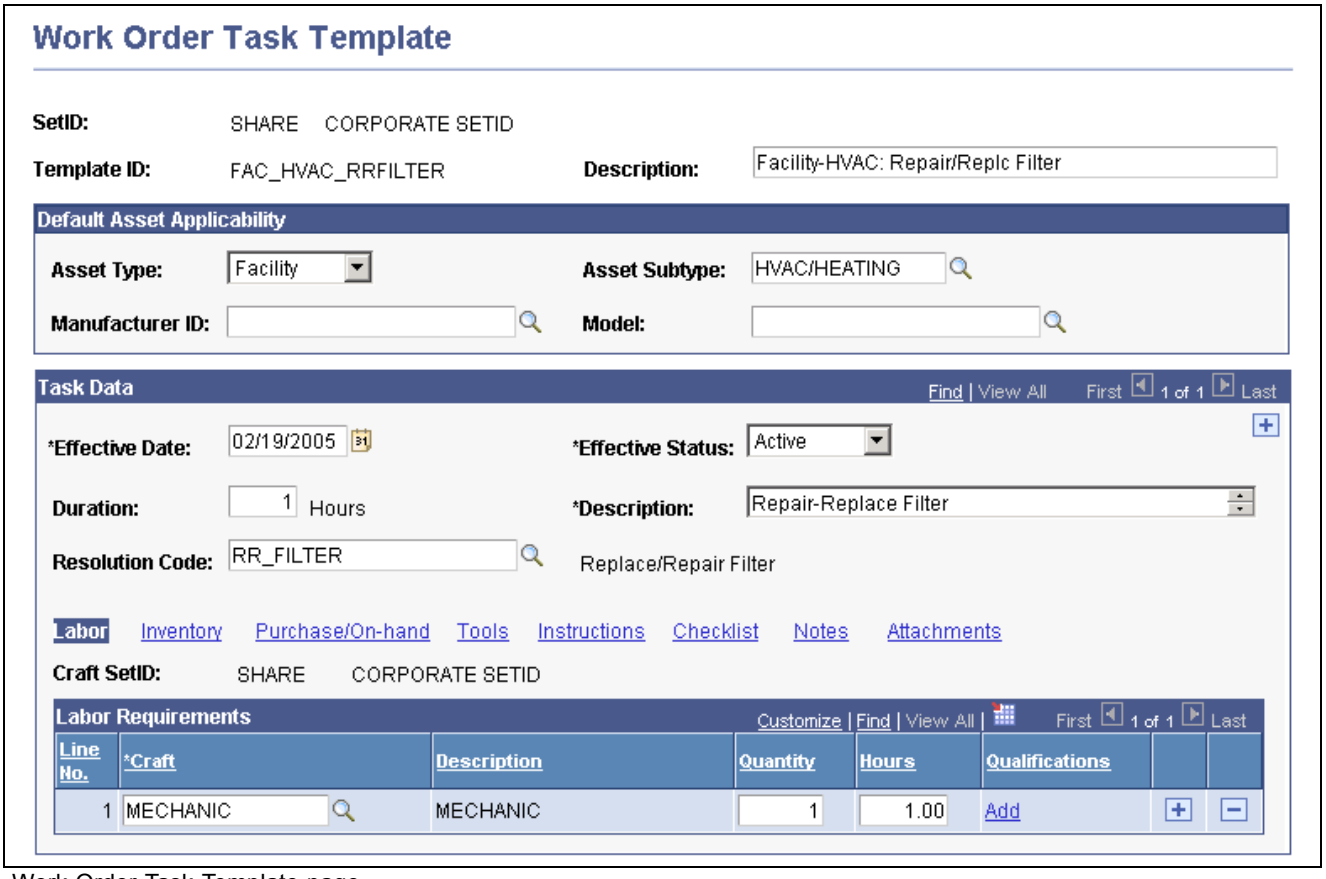
Pages Used To Set Up Work Order Templates

Page Name	Object Name	Navigation	Usage
Work Order Task Template	WM_WO_TASK_TMPLT	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Templates, Work Order Task Templates	Predefines work order data at the task (line) level for reuse in creating new work orders with equivalent work requirements.
Work Order Job Template	WM_WO_JOB_TMPLT	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Templates, Work Order Job Templates	Predefines work order requirements at the work order level, which consist of one or more job steps that are each represented by a predefined task template.

Setting Up a Work Order Task Template

Access the Work Order Task Template page.



Work Order Task Template page

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Default Asset Applicability

Asset Type, Asset Subtype, Manufacturer ID, and **Model** — Select these classification parameters to indicate that this template is applied to Asset instances matching this specified category combination only. Asset Type and Subtype must be specified together. Also, if you specify Manufacturer ID or Model, then you must enter of all of the higher-level categories.

Note. These fields are optional. If parameters are not selected, the template is considered to be non-asset related.

Task Data

Effective Date and **Effective Status** — Enter the date from which this template is either *Active* or *Inactive*. The selected effective date and status also apply to each of the requirements grids (Labor, Inventory, Purchase/On-Hand, and Tools), as well as instructions, checklists, notes, and attachments. When you copy a task template's data to a work order task, the system checks this effective date and status against the work order task's required start date. If the work order task does not have a required start date, then the current system date is used.

Important! If the effective date on the work order job template does not coincide with the effective date on a work order task template that is added as a job step to the job template, the system will not copy this task to the work order.

Duration (Hrs) (hours) — Enter the overall duration of this task activity in hours. The unit of measure (hours) used here is hard-coded to match the unit of measure for the duration of a task in a work order.

Note. You can override this field in the work order task.

Description — Enter a complete description of the task. This is a required field.

Resolution Code — Associate this task with a resolution code that most aptly applies to this task. This code is used for PCR tracking purposes and as a search value that is used to find an appropriate Task Template to copy to a work order.

Note. You can override this value in the work order task.

Labor Requirements

Click the Labor link to optionally define the labor requirements for this work order task.

Inventory Requirements

Click the Inventory link to optionally define the inventory requirements for this work order task.

Note. You must install PeopleSoft Inventory to access this link.

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Purchase/On-Hand Requirements

Click the Purchase/On-Hand link to optionally define noninventory labor, materials, or tools that the user must procure by creating either a purchase order or a requisition (specified in the work order business unit) in the PeopleSoft Purchasing application for the work order task. You can also define noninventory materials that are on-hand in the shop and are not usually tracked, such as a large barrel full of nuts and bolts.

Tool Requirements

Click the Tools link to optionally define tools requirements for the work order task.

Instruction

Click the Instruction link to optionally predefine a list of operational instructions for directing the activities of the work order task.

Checklist

Click the Checklist link to optionally create a list of required and suggested steps to follow to complete the work order task.

Notes

Click the Notes link to optionally enter any comments that are needed to complete the work order task.

Attachments

Click the Attachments link to optionally attach a number of different file types, including .html files, and other information that are associated with the work order task.

See Chapter 17, “Defining Work Order Task Requirements,” Labor Requirements, page 426.

See Chapter 17, “Defining Work Order Task Requirements,” Inventory Requirements, page 427.

See Chapter 17, “Defining Work Order Task Requirements,” Purchased and On-Hand Resource Requirements, page 429.

See Chapter 17, “Defining Work Order Task Requirements,” Tool Resource Requirements, page 429.

See Chapter 14, “Creating a Work Order,” An Overview of Work Orders, page 363.

Setting Up a Work Order Job Template

Access the Work Order Job Template page.

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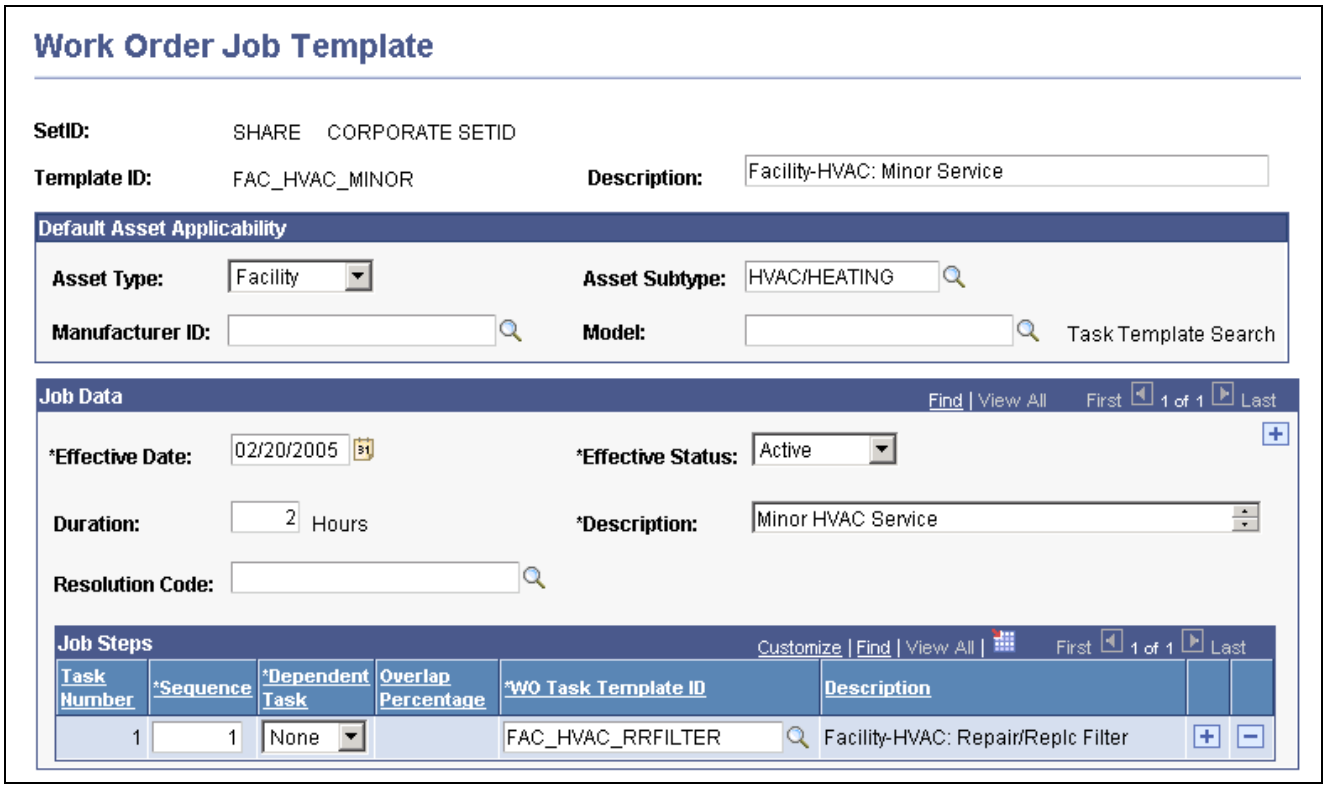

Work Order Job Template page

Default Asset Applicability

This group box contains the same fields as the fields described for the Work Order Task Templates. Entry of these fields is optional. If you leave them blank, this is considered a non-asset job template.

See Chapter 9, "Defining Work Order Templates," Setting Up a Work Order Task Template, page 245.

Job Data

Effective Date and **Effective Status**

Select the date that the information in this Job Data group box becomes effective and whether the information in the group box is *Active* or *Inactive* as of the selected date. The date and status that you select here also applies to the Job Steps grid on the page since it resides within the Job Data group box. These are required fields.

When you copy a work order job template to a work order, the system compares the work order header's required start date with the job template's effective date. If the work order header does not have a required start date, then the current system date is used.

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Important! When you create a job template (Set Up Financials/Supply Chain, Product Related, Maintenance Management, Templates, Work Order Job Template) and you search for a work order task template to associate with the job template, the search results only consist of work order tasks templates that fall within the effective date parameters of the job template. However, when you copy a job template to the work order, the system only allows you to copy job templates with effective dates that fall within the parameters of the work order header's Required Start Date field. Also, only work order task templates with effective dates that fall within the parameters of the work order task's Required Start Date field are copied to a work order task. If the Required Start Date is not available in either instance, then the current system date is the controlling factor.

Duration (Hrs) (hours) Enter the number of hours it will take to complete the entire work order, including all job steps and task activities.

Note. This field is optional. If you enter a value, you can override this value in the work order.

Resolution Code Select a resolution code to apply to the entire work order. This code is used for PCR tracking purposes and to use as a search value to find an appropriate job template to copy to a work order.

Note. This field is optional. You can override this selected value in the work order.

Job Steps

You can enter one or more job steps that are each associated with a work order task template.

Sequence Enter or override a number that indicates the order in which you want this job step (task template) to occur.

Note. Job step sequencing is optional.

Dependent Task Select the task number (job step) number that this current job step (work order task) is required to follow and is dependent upon.

Note. Task dependency is optional.

Overlap Percentage Enter the percentage of overlap that exists between the dependent task and this task.

Note. Entering a percentage in this field is optional, even if you specify a task dependency.

WO Task Template ID Select the work order task template to apply to a work order content for this job step.

Note. You are notified at save time if a task template is incompatible.

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CHAPTER 10

Configuring Work Order Approval Workflow

This chapter provides an overview of the work order approval workflow architecture and discusses how:

- Understand the work order approval workflow architecture.
- Revise the delivered work order approval workflow.

Understanding the Work Order Approval Workflow Architecture

To ensure that all work orders have proper authorization, the system is able to dynamically route work orders to the appropriate people for approval using business rules that you establish for your organization, based on your particular business needs. This section discusses:

- Terminology.
- Architecture.
- Work order approval workflow modifications.

See Also

PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook, "Using Workflow and Managing Approvals"

Terminology

This table provides definitions for the work order workflow terminology that is used throughout this chapter:

Ad Hoc Approver/Reviewer	Technician or approver can add another user ad hoc to approve or review the current work order only. The process definition is not modified, so it does not affect other work order approval routings.
Approval Map	The graphic representation of an approval instance with stages, paths and steps.
Approval Path	A path is a group of sequential, related steps, such as approval steps based on a single department hierarchy (for example, manager, director, VP, and so on).
Approval Stage	A stage is a collection of paths. Stages come in a single sequence (stage 1, stage 2, …). A stage runs when it's immediately preceding stage finishes. When a stage runs, all the paths within it run simultaneously. The stage is considered complete when all paths within it have finished.
Approval Step	The basic unit of approval. A step has one or more approvers, whose actions are tracked. A step can be configured to require a set number of approvers

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	to act and has criteria that govern whether or not the step is to be active for the work order.
Approver	Manager or maintenance planner who is responsible for approving the work order.
Criteria	A criterion is an entity, which evaluates to true or false. Criteria are used to determine which steps and paths are to be considered active for a particular request undergoing approval processing. Criteria can be configured by the functional analyst or can be canned queries, SQL objects, app classes, and so on.
Reviewer	The application routes work orders to reviewers for informational purposes, but reviewers do not need to take any action for the approval process.
User List	Approvers, reviewers, and other actors are grouped by roles and other means. SCM Approval Framework provides an abstraction across such aggregates, called Userlists.
Work Order Approval Process Definition	A set of rules to govern how the works order approval process should flow for a business unit (setID-based sharing) based on the business requirements. Within the process definition, stages, paths, and steps can be defined with different criteria and approver designations.
Work Order Approval Process Instance	A running instance of the approval process for a particular work order with criteria evaluated and specific approvers known (routed or not routed).

Architecture

The work order approval workflow uses the workflow framework provided by PeopleSoft Enterprise Supply Chain Management, rather than the standard PeopleTools workflow, which requires advanced technical skills in PeopleTools. Consequently, the PeopleSoft Maintenance Management workflow is easy to create and maintain. All the steps in the work order approval workflow are defined using PeopleSoft pages and are designed so that functional users can easily set it up.

PeopleSoft Maintenance Management delivers the work order approval workflow engine preconfigured. We recommend using the delivered configuration as is, making minor modifications to suit your particular business practices. The work order approval is delivered as system data, using the WM_WORK_ORDER approval process ID. You can modify the definition to suit your implementation by defining your own phases, steps, and criteria. These definitions control who should approve the work order, the order in which they approve it, and the method by which the system routes it to approvers. The approval process is keyed by setID, and by using setID sharing, each business unit can either have its own independent work order approval process configuration or share the same approval process configuration with other business units. We recommend that you understand the workflow technology before making any changes.

See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, “Using Workflow and Managing Approvals”.

Work orders are routed to approvers so that they can act on the work orders to approve or deny them. If the approver approves a work order, then it is routed to the next approver, if any. A submitter or approver can add ad hoc approvers for the current work order as well. After the work order is fully approved (or no approval is required), it is available for a scheduler to schedule technicians to perform the work. If the approver denies a work order, than the approval process is terminated. The submitter is notified of the denial and can optionally revise the work order and resubmit it. The technician can choose to cancel a work order; and if an approval process is in progress, it will be terminated.

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The following elements are used in the work order approval process definition and are among the items you would modify to suit your business requirements:

- Stages.

  A stage is one part of an approval process that can contain multiple parallel paths. The system executes stages in sequence where one must complete before the next one begins. A stage consists of one or more paths.

- Paths.

  A path contains a sequence of steps. Within a stage, paths execute in parallel. Path entry criteria determine whether a path executes for a given work order.

- Steps.

  A step represents one or more approvers or reviewers. Steps within a path execute in sequence. Separate criteria for each step determine whether or not that step executes. Each step can also have a set of reviewers, who are notified about transactions pending approval by email, if configured, and through the Worklist. But the workflow proceeds without waiting for reviewers to act.

Note. While the approval process configuration may require any number of approvers to approve a step before it advances, any single approver can deny a work order. After a work order is denied, the system stops routing the work order, the approval process terminates, and the entire work order is denied.

The system notifies approvers of a pending approval by using Worklist and email. You need to define the individuals or roles that comprise a user list, and the authorized approvers. You can specify approvers by roles, queries, fixed lists, or by using custom application classes. Once the required number of approvers have approved a step, the approval workflow advances past that step.

The following diagram illustrates the overall process flow for the work order approval workflow process:

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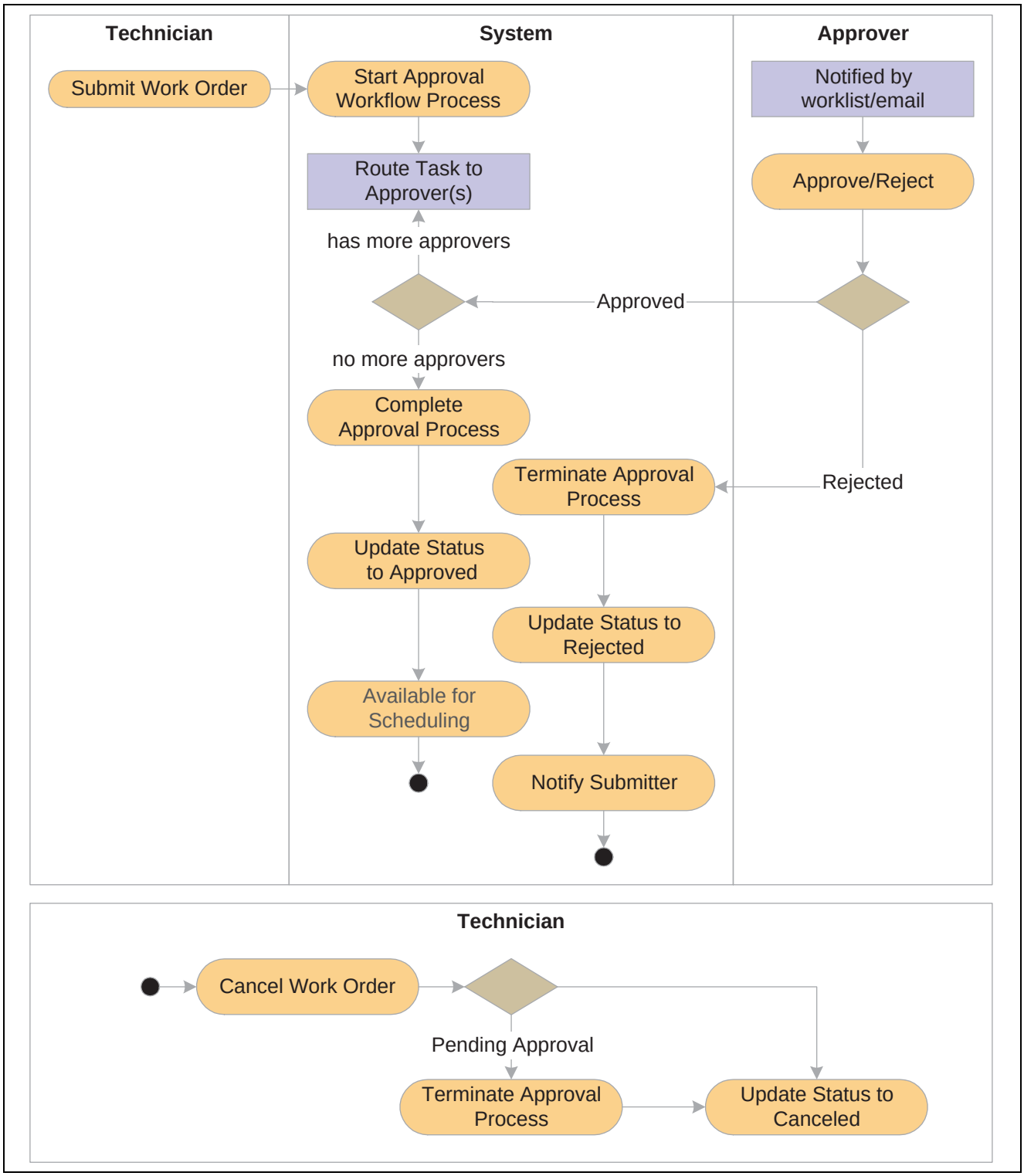

Work order approval process flow

Work Order Approval Workflow Modifications

To make adjustments to the delivered work order approval workflow process, complete the following tasks, which are discussed in detail in the remainder of this chapter:

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1. Update the work order approval process definition by using the Approval Process Definition component.

   The approval process definition specifies the stages, paths, steps, and criteria for the workflow approval process.

2. (Optional) update the method of notification that is used for approvals by using the Approval Transaction Registry page.

   The transaction definition contains the metadata which describes the transaction make up to the workflow approval engine. PeopleSoft delivers the transaction registry for work order approvals; you do not need to create it. As delivered, the system is configured to use emails and worklists.

3. Add or update user lists by using the User List Definition page.
4. Add or update work order approvers by using the Authorize Approvers page.

Revising the Delivered Work Order Approval Workflow

This section discusses how to:

- Modify the approval process definition.
- Define approval criteria.
- Define approval paths.
- Define approval steps.
- Authorize approvers.
- Modify approval notification options.
- Define generic notification templates.
- Maintain user list definitions.

Note. This documentation discusses only the fields that apply to PeopleSoft Maintenance Management. Information about the remaining fields are described in the *PeopleSoft Enterprise Supply Chain Management 8.9 Common Information PeopleBook.*

See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, “Using Workflow and Managing Approvals”.

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Pages Used to Revise the Delivered Work Order Approval Workflow

Page Name	Object Name	Navigation	Usage
Approval Process Definition	SAC_AW_PRCS_MAIN	Set up Financials/Supply Chain, Common Definitions, Approvals, Approval Process	Establish work order approval process definitions.
Criteria Definition	SAC_CRITERIA	• Click the Criteria link on pages within the Approval Process Definition component. • Click the Self-Approval Criteria link on the Step page.	Define criteria for workflow approvals.
Path	SAC_AW_PATH_SEC	Click the Path Details link on the Approval Process Definition page.	Set up workflow approval paths.
Step	SAC_AW_STEP_SEC	Click the Step Details link on the Approval Process Definition page.	Define steps for workflow approvals.
Authorize Approvers	SAC_AW_AUTH	Set up Financials/Supply Chain, Common Definitions, Approvals, Approval Authorization	Define approvers for the work order approval workflow process.
Approval Transaction Registry	SAC_AW_TXN	Set up Financials/Supply Chain, Common Definitions, Approvals, Approval Transaction Registry	Specify the notification method to use for work order approvals. The transaction definition is the metadata that describes the transaction make up to the approval workflow engine. The remaining fields should not be modified.
Generic Template Definition	WL_TEMPLATE_GEN	Setup Financials/Supply Chain, Common Definitions, Approvals, Generic Templates	Enter template definitions for ad hoc approval notifications.
User List Definition	SAC_USER_LIST	Setup Financials/Supply Chain, Common Definitions, Approvals, User List	Define user list definitions.

Modifying the Approval Process Definition

Access the Approval Process Definition page using the WM_WORK_ORDER approval process.

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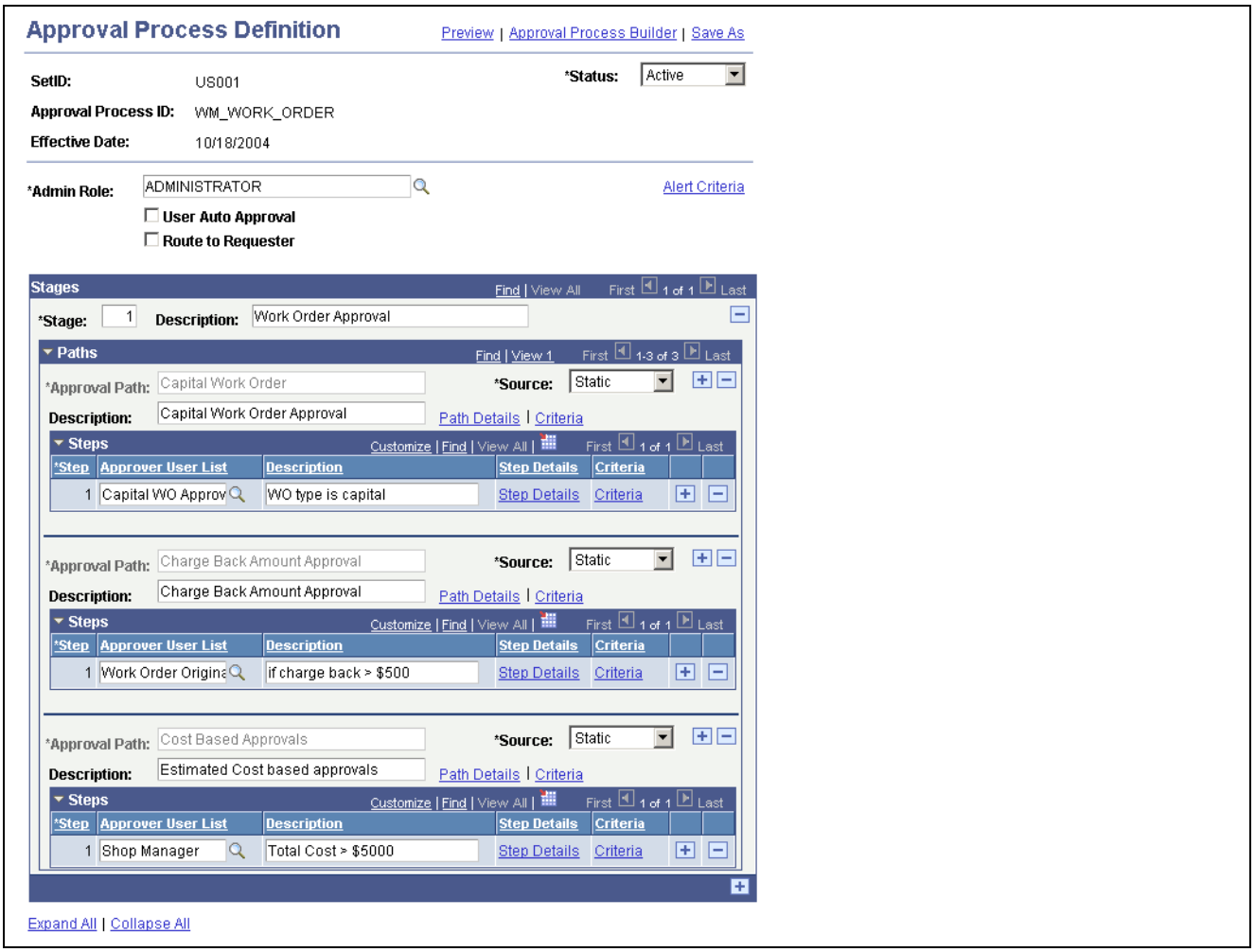

Approval Process Definition page

Preview Click to view how a workflow instance would function when it runs.

Approval Process Builder Click to access a graphical tool that enables you to view each stage, path, and step of the approval process.

Note. When you are viewing the graphic tool in the Approval Process Building page, if you elect to make changes the system will return you to the standard Approval Process Definition page.

Set ID Identify the set ID for the workflow approval process.

Effective Date Specify the date on which this approval process is effective and ready for system use. This applies to approval processes for a particular approval process ID and setID and includes PeopleSoft functionality associated with effective-dated entities. For instance, if multiple approval processes are active with the approval process ID, setID and effective date specification, then the system uses the latest active effective-dated process.

Status Select the current state of this approval process. The values are:

Active: Indicates the approval process is available for use.

Inactive: Indicates the approval process is not available for use.

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Admin Role (administrative role name)

Select the user list role to route the transaction to if an error occurs during the work order approval process.

Note. The error conditions are no approvers or not enough approvers.

User Auto Approval

Select to enable the system to remember an approver's action for this process. The next time this approval process is presented to the approver, the system automatically applies the approvers selections. The automatic application of steps in the process is left in place until you clear the User Auto Approval check box.

This applies to the specific work order the approver had previously approved in this process only.

Route to Requester

Route to Requestor works in conjunction with the Self Approval flag. If the approver failed to meet the self approval criteria, the approval could still be routed if this check box is enabled. If the check box is not enabled and the approver fails to meet the self approval criteria, then the system routes the approval to the administrator.

Alert Criteria

Click to access the Criteria Definition page where you can define user and field criteria along with monetary and application class criteria for this stage.

See Chapter 10, "Configuring Work Order Approval Workflow," Defining Approval Criteria, page 259.

Stage

Enter the sequence in which you want this stage of the approval acted upon. You can also enter a description for the stage in the Description field.

A stage is a logical grouping within a process, such as commodity or fiscal approval. You can define a single stage or use multiple stages, in which case the stages execute in strict sequence. Before the second stage starts, the first stage must end.

Each stage must be either at the header level or at the line level. This is the additional constraint on header- versus line-level approval configurations. A header-level stage acts on the single header. A line-level stage acts (simultaneously) on all the lines under the header.

Note. For PeopleSoft Maintenance Management work orders, approval is done at the header for the entire work order, not for individual work order tasks, and only the header level is supported.

Level

Select *Header*. At a header-level stage, the system enables the same request (header) to be routed to two or more parallel paths. Line level approvals are not supported for work orders.

Approval Path

Enter a value that identifies this path. A path is a sequence of steps.

Within a stage, paths execute in parallel with each path at the level from the stage to which it belongs. Path-entry criteria determine whether a path executes. If the system evaluates the criteria you enter for a path to be false then it bypasses that path.

When a stage becomes active (approvers in the stage get pending work), all its contained paths become active simultaneously. All the paths of a stage

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queue work to approvers in parallel. The stage is complete only when all paths in it complete.

Source Select the method by which steps are instantiated during the approval process. Values are:

Static: Select this source to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: A dynamic path definition contains only one step. When begun, the single step definition could yield any number of instances in sequence.

When using the *Dynamic* source, the system uses the user list on the step definition to initialize the steps in the path. The single step definition is repeatedly run, until the step's user list returns no more approvers. All these instances are queued in sequence.

User lists are associated with queries and classes using the User List Definition page. To access the page, select Set Up Financials/Supply Chain, Common Definition, Approvals, User List.

Path Details Click to access the Path page where you can define path criteria and escalation parameters, such as whether or not to notify the requester's supervisor.

Criteria Click to access the Criteria Definition page where you can define field criteria along with monetary and application class criteria. You can define criteria for the approval process using most records and fields in the database. The system uses these criteria as entry criteria for both the path and step.

Step The sequence in which you want this step performed during the approval process. Use the arrow icons to move a step up or down in the sequence of steps.

Approver User List Select the type of approver you want to use for this step. A user list is an entity which groups users in the system. Roles, queries and application classes are examples of user lists. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval steps.

When configuring approval workflows, business analysts use user lists to assign approval tasks to the approvers and reviewers who are to act on the request being considered for approval.

The approval engine has two types of contextual information available to the user list definition: the previous approvers in the path, and the transaction (header or line) keys. The previous approver of the first step of a path is always the requester, regardless of which stage the path belongs to. In the case of SQL queries, the context is provided by bind values. The bind values are the prior approver (one per call, in case there are multiple prior approvers) and the keys of the header record. The key values are provided in the order in which they are defined in the corresponding record object.

Step Details Click to access the Step page where you can define approver requirements, self approval details, and reviewers.

Defining Approval Criteria

Access the Criteria Definition page for the WM_WORK_ORDER approval process.

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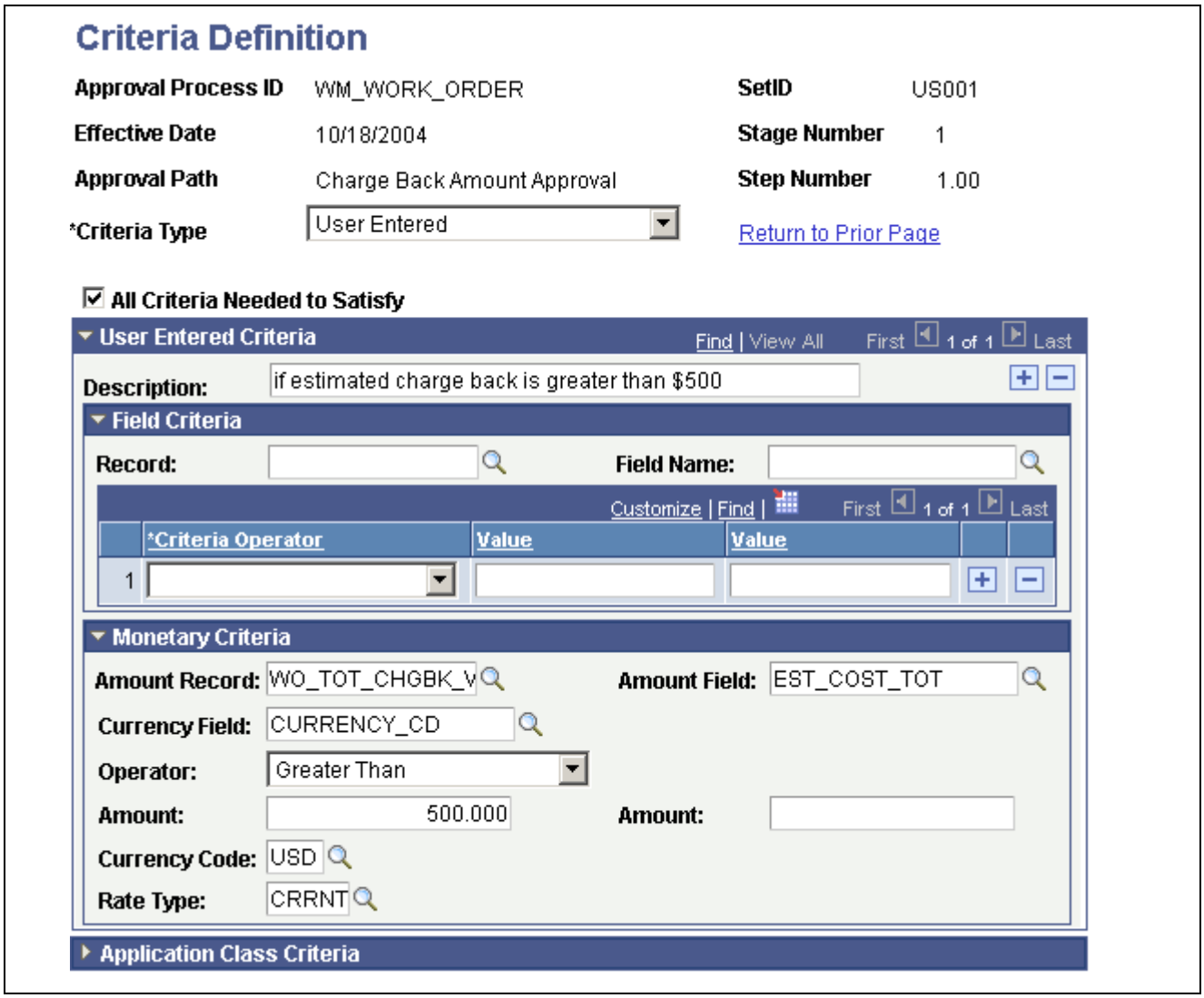

Criteria Definition page

Use this page to define the different types of criteria that you want to apply to a workflow approval process. You can create definitions consisting of a field with a logical operator and a value or definitions consisting of an application class that takes in transaction data to process the approval.

Criteria is an entity which evaluates to true or false. It programs the approval workflow engine, using transaction-specific information to change, for example, routing paths. In order to set the context for the criteria, the engine provides the transaction keys as bind values.

If you access this page using the Alert Criteria link, you can define criteria for the overall approval process definition. If you used the Criteria link to access the page, you can define criteria for steps or paths, depending on the section from which you access this page.

Criteria Type

There are three different types of criteria you can enter:

- The system will only follow paths that evaluate as true. *Always True* informs the system to trigger this workflow approval process. No criteria is needed.
- With the criteria type*Application Class* you define which specific application class the system uses to determine if the workflow approval task evaluates as true.

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Note. Use the *Application Class* criteria type when the user entered criteria does not contain the necessary level of detail.

- Use the criteria type of *User Entered Criteria* to enter all record and field combinations either value or monetary based, that will trigger the workflow to evaluate as true.

All Criteria Needed to Satisfy Select this check box to require that all criteria defined on the Criteria Definition page must be met in order to trigger the workflow.

User Entered Criteria

Use this section to define additional criteria for the approval.

Description Enter purpose of the alert.

Field Criteria

Use this section to select a record and field on which to control and filter ranges of data or types of data placed in the file that you want to use in the approval process.

Record Select a record that you want to use in defining approval criteria.

For example, if you were indicating a type of work order, you would identify *WM_WO_HDR* as the record.

Field Name Select a field that you want to use to define approval criteria. The values you define in the remaining field criteria grid are those that are used in determining the approval criteria.

Criteria Operator Determines the action the system applies to the criteria you enter in the Value fields.

These operators are available:

- *Between:* Use only values between the two values you enter as criteria.
- *Equals:* Use only values equal to the entered criteria.
- *Greater Than:* Use values equal to or greater than the entered criteria.
- *Is Blank:* Evaluates to true when the specified field contains a null value.
- *Is Not Blank:* Evaluates to true when the specified field does not contain a null value.
- *Less Than:* Use any record value that is less than the value entered in the Operator Criteria field.
- *Not Equal To:* Use any record value that is greater than or less than the entered criteria.
- *Not Equal To:* Use any value that is not equal to the two values you enter as criteria.

Value Use the two Value fields to define a range upon which you want to base the operator criteria.

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Monetary Criteria

Use this section to establish approval criteria for work order amounts. The system uses the values you define to determine the routing for approving the work order. When the system evaluates the criteria for an approval process or a step or path within the process, it uses monetary values you define in this section.

The system uses values from fields in this section in conjunction with the Operator field to determine whether to run a step.

Amount Record Select the record name to be used when comparing the work order to the minimum amount required to trigger the step.

Amount Field Select the field within the amount record to be used when comparing the work order to the minimum amount required to trigger the step. The system uses the value that you select to evaluate the Amount field.

Currency Field Select the currency field that corresponds to the currency code you select in the Currency Code field.

Operator Select a value that determines how the system processes the values in the Amount fields. Values include *Between, Greater Than,* and *Less Than.*

Amount Use the Amount fields to define an amount range for use with the Operator field.

In the first field, enter the minimum amount required on the work order to trigger the step. The system identifies all lines in the work order that meet the criteria defined in the Amount Record and Approval Field fields. The amounts on these lines are totaled based on the amount record and amount field specified. If the work order total is higher than this minimum amount, the criteria is met. If no amount is specified, zero is considered the minimum.

Currency Code Select the monetary unit that you want to use for the approval.

Rate Type Select how the system arrives at the currency value, such as the current rate or a financial rate.

Application Class Criteria

These fields are not used for work order approval workflow and are unavailable for entry.

Defining Approval Paths

Access the Path page.

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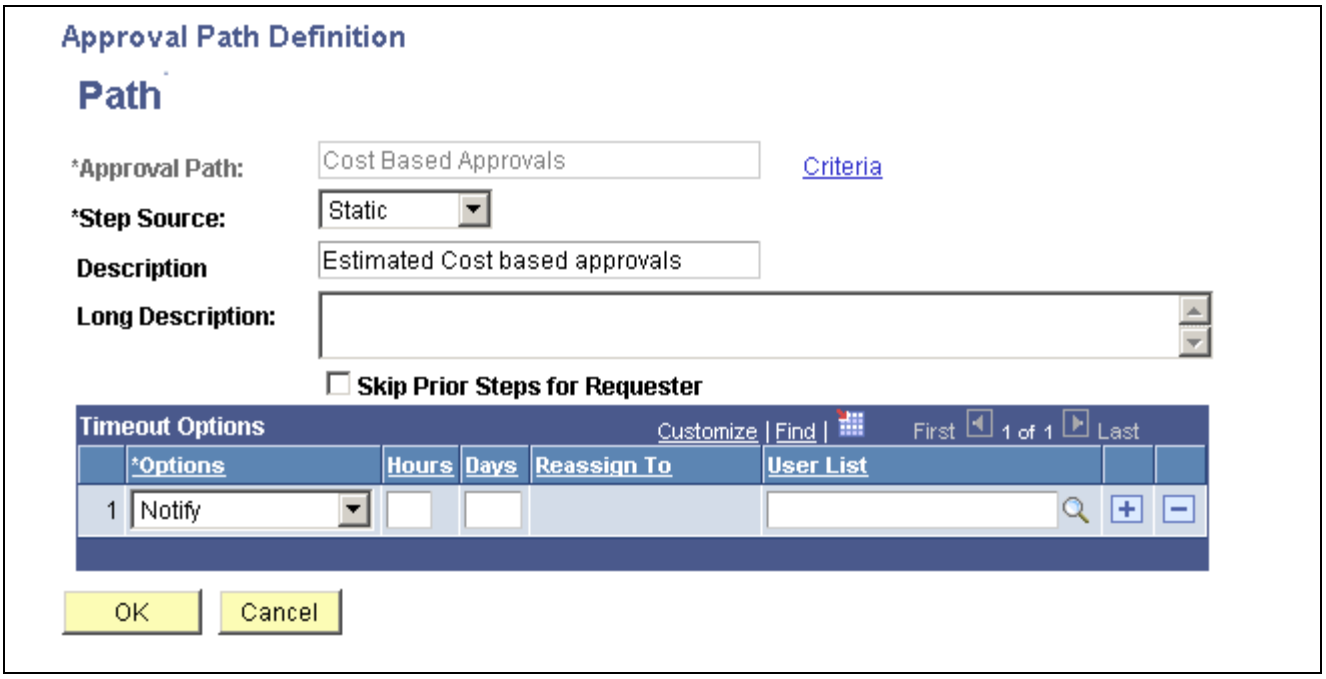

Path page

Use this page to set up additional parameters that determine how the system processes an approval path. Use the escalations feature to define time elements for when an approver takes too long to approve or deny a pending request.

Approval Path Displays the path name that you are creating or updating. The path provides the sequence of approvers of a request, usually from a single reporting (or other) hierarchy.

Criteria Click to access the Criteria Definition page where you can define user and field criteria along with monetary and application class criteria.

Step Source *Static:* Select this source to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: A dynamic path definition contains only one step. When begun, the single step definition could yield any number of instances in sequence.

When using the *Dynamic* source, the system uses the user list on the step definition to initialize the steps in the path. The single step definition is repeatedly run, until the step's user list returns no more approvers. All these instances are queued in sequence.

Skip Prior Steps for Requestor If one of the approvers in this path is also the requester, then select this option to have the system skip all steps in this path prior to that approver's step.

Timeout Options

The timeout options enable you to define the amount of elapsed time allowed for an approver to take action on a workflow step before the system escalates the step, and define what to do when an approver does not respond within the allowed time.

Options Select the type of timeout option to define. Options are:

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Advance Approval: The workflow approval will move to the next approver in the chain after the number of days and hours you specify.

Notify: A user will receive a notification after the specified period of time without approval or denial taking place.

Reassign: The system automatically reassigns the work order to another designated approver in the same stage if approval or denial has not occurred within the designated period of time.

Hours Enter the number of hours a transaction can remain at one workflow step before being escalated. This field is combined with number of days to determine the total time an approver has to take action on an approval request.

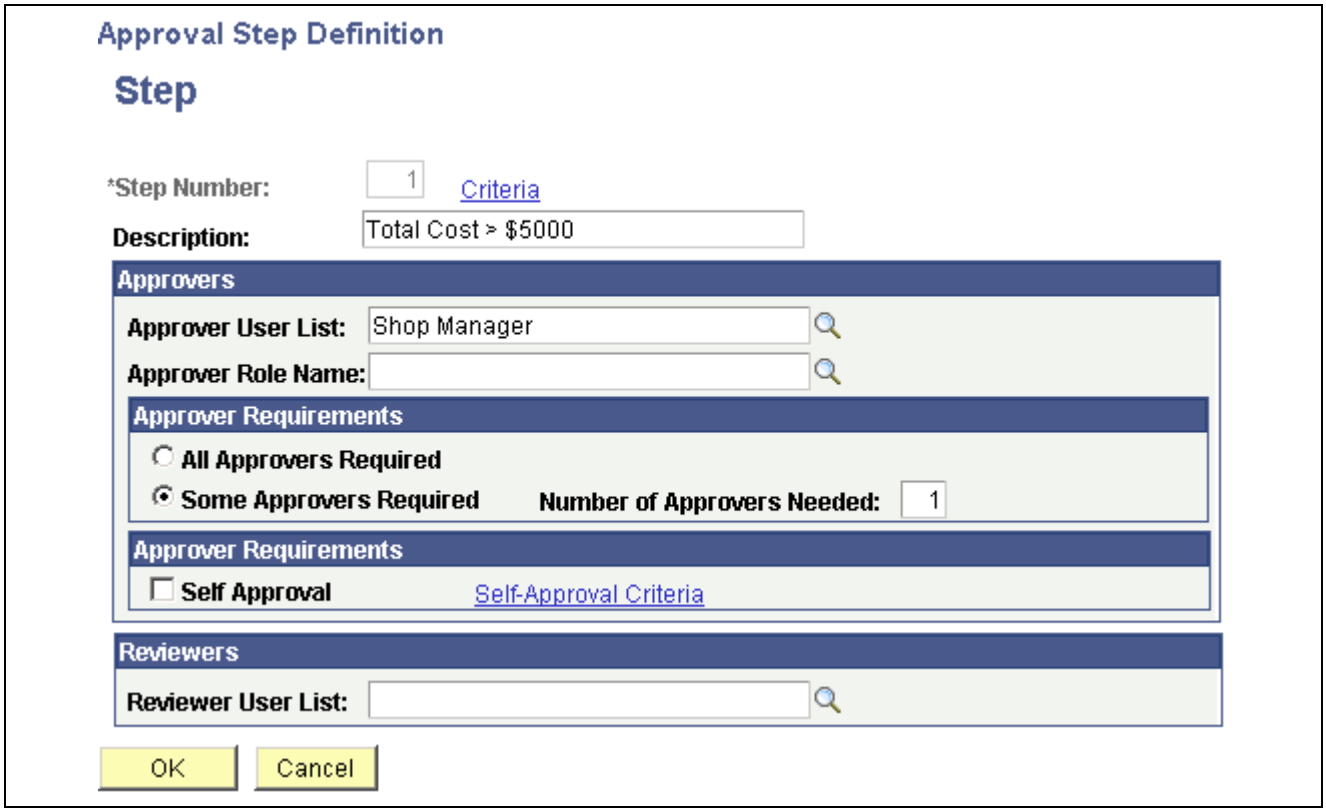
Days Enter the number of days a transaction can remain at one workflow step before being escalated. This is the length of time an approver has to do something such as approve or deny a transaction.

Reassign To If the timeout option is *Reassign,* specify the userID to whom you want to reassign the approval task.

User List If the timeout option is *Notify,* specify the user list to which you want to send the notification.

Defining Approval Steps

Access the Step page to set up additional parameters for the step definition.



Step page

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Step Number Enter the number for this step. It's the sequence in which an approval is routed. Each step typically represents a routing to an approver. However, it is possible to route to multiple approvers or reviewers in a step as well.

Approver User List Select the type of approver you want to use for this step based on the user list.

Approver Role Name In addition to a user list, a role can be added to check for additional authorization checking. Select a role that specifies the authority that a user has. The approval workflow engine filters approvers returned by the user list for this role. It also enforces the role at the time the approver acts. If the role assignment changes, such as the approver is no longer in the role, the approver is blocked from acting on the work order.

All Approvers Required Select to indicate that all approvers at this step are required to approve the work order at this step. You can select to have all approvers or some approvers approve the work order at this step.

Criteria Click to access the Criteria Definition page where you can define field criteria along with monetary and application class criteria.

Some Approvers Required Select to indicate that it's not required for all approvers to sign off on a work order. If you select this option, you can define the number of approvers required in the Number of Approvers Needed field.

Number of Approvers Needed Enter the minimum number of approvers you want to sign off for a work order at this step. When an approval process is launched and this number can't be met, the system notifies the approval *Admin Rolename*.

Self Approval Select to indicate that requesters can also approve their own work order. This only applies if the requester also appears as an approver in the step. You can establish criteria that control the requester's approval authority by using the Self-Approval Criteria link. If the associated criteria evaluate to true, then self-approval is acceptable. For example, you can place a limit on the dollar amount for the requester so that if the transaction is over that amount, the requester is not used as an approver.

If you select self approval and the criteria is not met, the approval workflow engine requires that there be at least one more step after this one in the path. This does not apply to ad hoc steps. Clearing the check box means that self-approval is never acceptable.

Note. If the criteria are not met, and there is no later step, the system inserts an additional step. This is then routed to the administrator.

Self-Approval Criteria Click to access the Criteria Definition page where you can set up self-approval criteria for a user, including field criteria and monetary and application class criteria.

Reviewer User List Select the type of reviewer you want to use for this step. You use a user list to map users to certain functional roles. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval and review steps.

Authorizing Approvers

Access the Approval Authorization page, using the WM_WORK_ORDER approval process ID.

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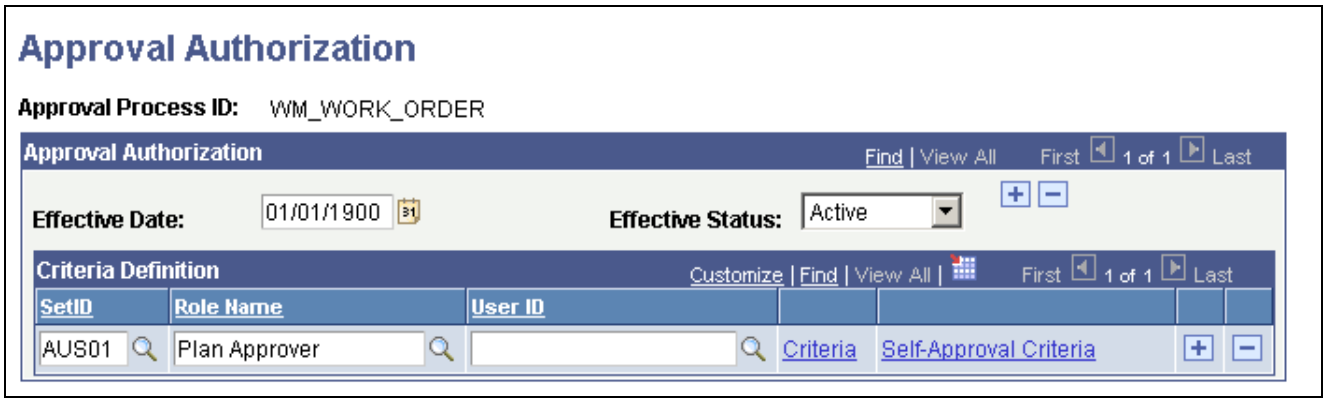

Approval Authorization page

Use this page to define approvers and their authorization criteria for use in the work order approval process.

Approval Process ID Select WM_WORK_ORDER.

Role Name Select a role that you want authorized as an approver when this approval process is used for document approvals. You can select a role name or a user ID for each row, but not both.

User ID Select a user whom you want authorized as an approver when this approval process is used for document approvals.

Criteria Click to access the Criteria Definition page where you can set up approval criteria for each user or user role that you select.

Self-Approval Criteria Click to access the Criteria Definition page, where you can define the conditions under which work order submitters can approve their own transactions. For example, you can define the greatest amount the submitter can self approve before additional approvals are required.

The User Auto Approval check box setting on the Approval Process page enables self-approval. If self-approval is enabled, the system assumes that the work order submitter can approve a work order. If you establish criteria that control the submitter's approval authority, and that criteria is exceeded, the system does not include the submitter as an approver.

Modifying Approval Notification Options

Access the Approval Transaction Registry page using the WM_WORK_ORDER approval process ID.

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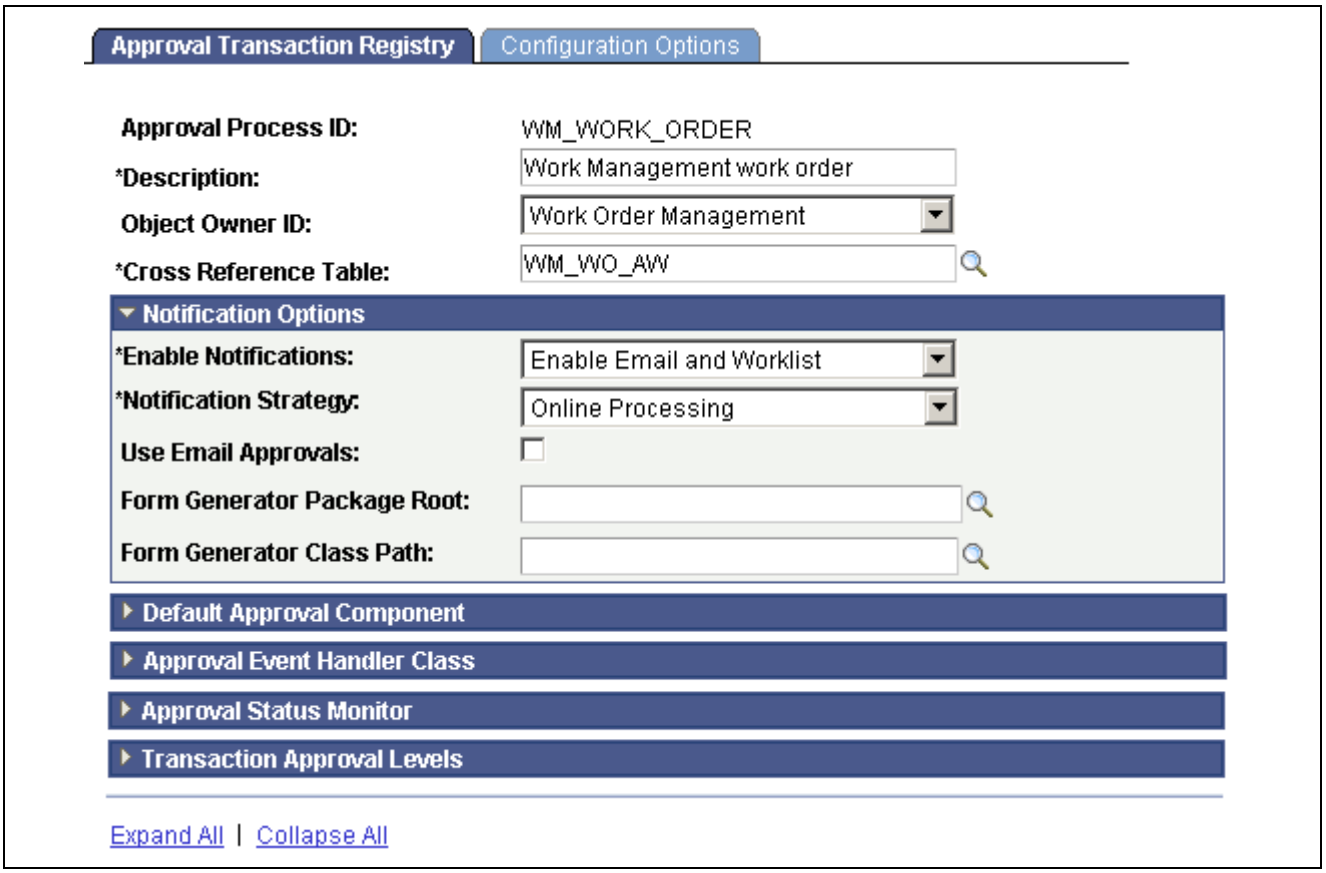

Approval Transaction Registry page

The approval transaction registry definition is the metadata that describes the transaction make up to the work order approval workflow engine.

Note. To use the delivered work order approval workflow, modify only the notification options list in this section. The remaining fields should not be changed.

Notifications Options

Enable Notifications Select the type of notifications to use for work order approvals. Options are:

Enable Email and Worklist: Select to use emails and worklist entries for notifications.

Email Notification Only: Select to use only emails.

Defining Generic Notification Templates

Access the Generic Template Definition page.

You use generic templates to establish common formats for ad hoc notifications.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology: Using Notification Templates, "Defining Generic Templates"

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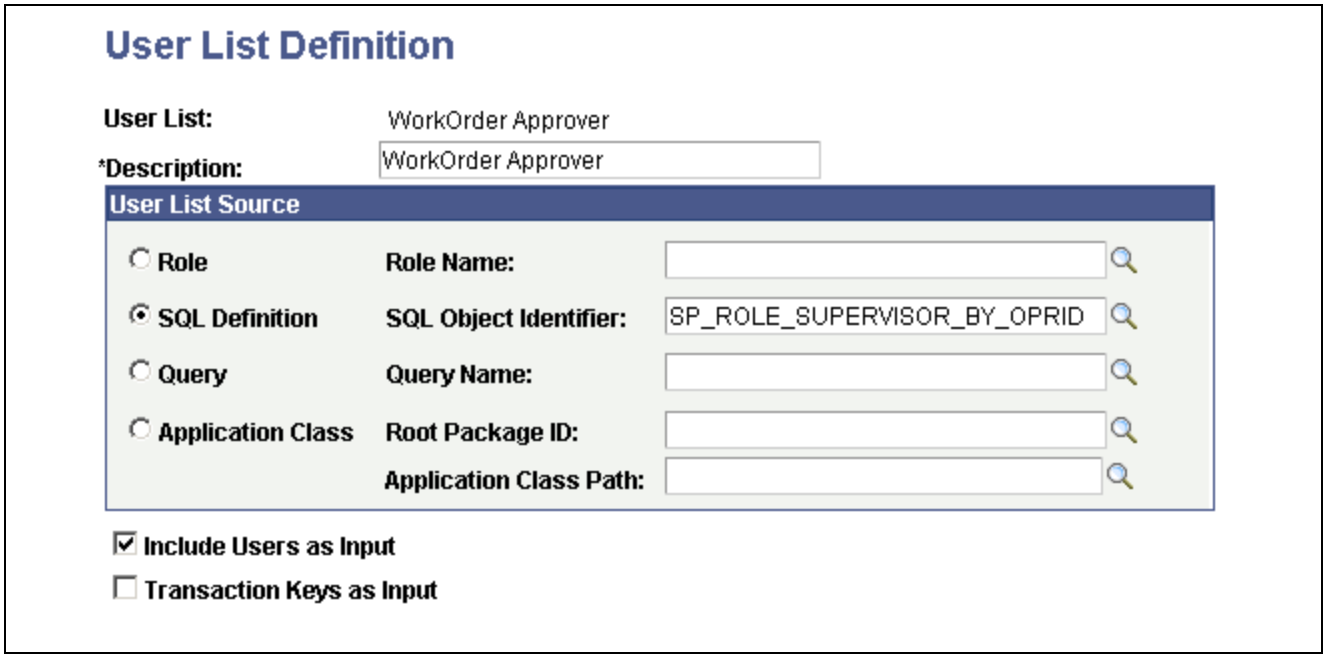
Maintaining User List Definitions

Access the User List Definition page.



User List Definition page

Use this page to define user sources for use with steps in the work order approval process. PeopleSoft delivers the following user lists for use with work order approvals: Work Order Original Requestor and Work Order Approver.

When you select a user list source type, you must also select a corresponding value. You can add a new user list or change a current list.

Note. You can select only one user list source for a user list.

Role Select to use a role as the source for this user list. A role is a list of users who perform the same type of work, such as buyers or managers. Each role has a set of parameters that determine the limits what the roles can and cannot do in the organization and in the workflow process.

SQL Definition Select to use a SQL definition as the source for this user list.

Two SQL Objects are delivered, one for work order shop manager (WM_WO_SHOP_MGR), and one for the original requestor of the work order (WM_WO_WR_REQUESTOR).

Query Select to use a query as the source for this user list. When a source is defined as a query, the system determines who should receive a work item based on the field values on the page that triggers the routing.

Application Class Select to use an application class as the source for this user list.

When you select to you an application class, the system passes in the originator of the transaction and then determines the approver for that originator. For subsequent approval steps, the system passes in the approver from the previous step.

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Note. The SQL definition, query, and application class user list sources are dynamic and can use input values to help identify users.

Include Users as Input When you select the check box, the system uses the originator of a transaction as the first step in each path. For subsequent steps in each path, the system uses the approver from the previous step.

Transaction Keys as Input Select to have the system base the approval routing on transaction keys. Transaction keys are key fields in a database table. The system uses transaction record keys from the header record. For PeopleSoft Maintenance Management these are the Business Unit and Work Order ID fields.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

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CHAPTER 11

Setting Up and Using Condition-based Maintenance

This chapter discusses how to:

- Set up CBM rules.
- Create and update a CBM alert in PeopleSoft Maintenance Management
- Create a CBM alert using Web Services.

Understanding Condition-based Maintenance

Oracle's PeopleSoft Enterprise Maintenance Management condition-based maintenance (CBM) enables you to make maintenance decisions based on the actual condition of the asset. You can identify equipment problems early, when they are less costly to correct, and perform maintenance only when needed.

Condition-based maintenance in PeopleSoft Maintenance Management:

- Requires the setup of Web Services and Integration Broker to enable communication to external monitoring systems, as well as the setup of PeopleSoft workflow and condition-based maintenance rules for PeopleSoft Maintenance Management.
- Uses alerts generated from real-time equipment monitoring devices that assess equipment conditions against predefined, normal operation parameters.
- Provides real-time alerts when equipment is operating outside of normal bounds so appropriate maintenance action can be taken.
- Initiates appropriate maintenance action, including creation of a work order, and PM schedule updates.

External systems measure and analyze current equipment readings and determine whether the condition of the equipment is outside of normal operating parameters. When the condition is outside normal operating parameters, an alert triggers a response and follow-up action. Users can manually create an alert or an external software program can create an alert.

Then, depending on the setup rules, the system sends a message to the CBM coordinator by email or through a worklist indicating the condition exists. The CBM coordinator reviews the alert and can either create a work order, or, if the alert can be handled using a preventive maintenance work order, the coordinator updates the PM schedule, which is used by the Preventive Maintenance process to generate a work order. The system tracks the status of an alert throughout its life cycle.

Terminology

The following terms are included in this chapter:

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Web Service	Web service as a software service exposed on the Web through SOAP, described with a WSDL file and registered in UDDI. Web services are the fundamental building blocks in the move to distributed computing on the Internet.
SOAP	As the communications protocol for Web services, SOAP is a lightweight protocol intended for exchanging structured information in a decentralized, distributed environment. SOAP uses XML technologies to define an extensible messaging framework, which provides a message construct that can be exchanged over a variety of underlying protocols. The framework has been designed to be independent of any particular programming model and other implementation specific semantics.
WSDL	WSDL (often pronounced whiz-dull) stands for Web Services Description Language. A WSDL file is an XML document that describes a set of SOAP messages and how the messages are exchanged. WSDL is an XML format for describing network services as a set of endpoints operating on messages containing either document-oriented or procedure-oriented information. The operations and messages are described abstractly, and then bound to a concrete network protocol and message format to define an endpoint. Related concrete endpoints are combined into abstract endpoints (services).

PeopleSoft Maintenance Management CBM Setup Considerations

There are specific steps that you must perform to enable condition-based maintenance in PeopleSoft Maintenance Management.

- To create alerts using Web Services, set up:
  - The external system that is used for monitoring the asset must follow Web Service standards and publish WSDL.
  - Web Services to work with PeopleSoft Integration Broker, which enables component interfaces and messages to be offered to third parties as web services.
- To create both Web Services and manual alerts, you must assign the role and route control profiles to the CBM coordinator's user profile.

  The role of CBM Coordinator (WM_CBM_COORDINATOR) and the Route Control Profile (WM_CBM_US001) have already been set up in the system data.

  PeopleSoft Workflow sends a notification message. In the worklist and email, use the "Two Route Controls Qry" from the recipient in the Fields Mapping. The role WM_CBM_COORDINATOR is passed as a bind variable for ROLENAME. Business unit and shop ID are passed as the other two bind variables.
- In PeopleSoft Maintenance Management , set up condition-based maintenance rules.

The system uses the rules you set up on the Condition-Based Maintenance Setup page to route alerts to the correct work order business unit and shop and thus the appropriate CBM coordinator. These rules also indicate maintenance type, work order type, and service group default values that will display in the work order or the PM schedule depending on the selected rule. The rules are selected by weighting each of the characteristics They provide default values for these actions:

- Update a PM schedule and run the Preventive Maintenance Process to generate a work order.
- Create a work order manually.

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Important! You must set up a user in PeopleSoft Security for the CBM Coordinator role.

The condition-based rules assign a weight to each of the attributes of an asset. The system matches the attributes of the asset associated with the alert with these rules and assigns the with rule with the highest total weight. . The asset attributes and their associated weights are:

- Asset Type: weight = 1
- Asset Subtype: weight = 2
- Asset Location: weight = 4
- Asset Area: weight = 8
- Asset ID: weight = 16

You can also enter a wildcard for the above attributes, which is equal to zero (0).

Note. You can assign any values you want to each attribute, if desired.

For example, if an external system is monitoring the condition of a building's air conditioning system where each unit has a monitoring attached to it that measures electrical load produced by the air conditioner. If the monitor on Unit A indicates that the electrical load has increased out of normal range, the system issues a message that the unit needs repair. Unit A is identified as: Asset Type: Facility; Asset Subtype: HVAC/Heating

- Asset Type: Facility
- Asset Subtype: HVAC/Heating
- Asset Location: US001
- Asset Area: Building B
- Asset ID: BAC000000A1

The condition-based rules that are set up in your system include (both tables apply to the same 5 rules) :

Row#	Asset Type (wt = 1)	Asset Subtype (wt =2)	Asset Location (wt =4)	Asset Area (wt =8)	Asset ID (wt =16)	Total Row Weight
1	% 0	% 0	% 0	% 0	% 0	0
2	IT Hardware 1	SERVER 2	% 0	% 0	% 0	3
3	IT Hardware 1	Laptop 2	US001 4	% 0	% 0	7
4	Facility 1	HVAC/Heating 2	US001 4	% 0	% 0	7
5	Facility 1	HVAC/Heating 2	% 0	% 0	% 0	3

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Row #	Business Unit	Shop	Maintenance Type	WO Type	Service Group
1	US001	Shop A	MINOR	CM	MAINT
2	US001	Shop B	MAJOR	PM	MAINT
3	US001	Shop B	MINOR	PM	MAINT
4	US002	Shop A	MINOR	CM	MAINT
5	US002	Shop C	MINOR	PM	MAINT

Based on the asset attributes you selected and the rules, the system matches:

Asset Attribute	Selected Asset Attributes	Matching Rule
Asset Type	Facility	Row 4 - Facility Row 5 - Facility
Asset Subtype	HVAC/Heating	Row 4 - HVAC/Heating Row 5 - HVAC/Heating
Location	US001	Row 4 - US001 Row 5 - %
Asset Area	Building B	Row 4 - % Row 5 - %
Asset ID	BAC000000A1	Row 4 - % Row 5 - %

RESULT: The system selects Row 4 because the total weighting for Row 4 = 7 and the total weighting for Row 5 = 3. Since row 4 is higher, the system will default the values work order business unit (US001), shop (Shop A), maintenance type (Minor), work type (CM), and service group (MAINT).

Note. Row 1 is also matched because the weight = 0. It is wise to include this general rule to enable the system to catch all of the alerts should no specific rule exist.

Each alert has a system-generated ID. During setup you specify the last CBM alert ID number used. The system uses this number to generate sequential Alert IDs for the Asset Management Business Unit alerts.

See *PeopleTools PeopleBook: Integrsation Broker*

Condition-Based Maintenance Alerts Issued Using Web Services

An external condition monitoring system sends a SOAP (Simple Object Access Protocol). request to PeopleSoft Maintenance Management when it detects an asset that is out of operational limits. Condition-based Maintenance receives the message of an alert via Web Services working with PeopleSoft Integration Broker.

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When the system receives an alert from an external condition monitoring system it takes the following steps:

1. Receives the SOAP request message of a new alert.
2. Validates the SOAP request message.
3. Uses the matching rules to populate the work order Business Unit and Shop ID.
4. Generates the Alert Identification.
5. Triggers the workflow to notify the person with the CBM Coordinator role and matching profile.
6. Saves the alert.
7. Sends back Alert Identification in a SOAP response message.

If the system finds an error in the request it sends back an error message to the external condition monitoring system. If the system cannot find a matching rule or a CBM Coordinator role user, it sets the status of the alert to Error when the alert is saved.

See *Enterprise PeopleTools PeopleBook: "Integration Broker"*

Condition-Based Maintenance Alerts Issued Manually

To enter an alert manually:

- A user determines that an asset performing outside operational limits.
- The user creates an alert on the Condition-based Maintenance Alert page.
- System matches the input to the Condition-based Maintenance Rules and populates the work order business unit and shop ID fields in the alert.
- The system generates an Alert Identification.
- Alert triggers workflow to notify the CBM Coordinator.
- Save the alert, which updates the Alert Status History.

CBM Work Order Creation Process

After receiving an alert the CBM Coordinator can create a work order, or update the PM schedule and the Preventive Maintenance process generates a work order. When the CBM coordinator clicks the Create Work Order button the system retrieves the default values and displays them on the Create Work Order page based on the matching rule. The CBM Coordinator can change the values if desired. The system creates the work order when the CBM Coordinator submits the request by clicking the OK button. You must access the work order component to create tasks and assign and schedule resources. If you plan to schedule a crew for this work order, you must use the Crew Scheduling Workbench and the Labor Assignment Workbench as well. The system updates the alert status to Work Order Created. When a work order is closed or cancelled the system updates the status of the related alert to close.

If the CBM Coordinator clicks the Update PM Schedule button, the Update PM Schedule page contains the default values based on the rules. The system updates the PM schedule, which was set up for this asset, and displays the schedule ID on the Condition-Based Maintenance Alert page. The system also updates the CBM Alert tab of the Preventive Maintenance Schedule Workbench for the PM schedule, indicating the source of the alert and if the override option is turned on in the schedule to enable the Preventive Maintenance process to generate a work order.

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See Also

PeopleSoft Enterprise Maintenance Management, Setting Up and Generating Preventative Maintenance Work Order

Setting Up CBM Rules

To set up CBM rules use the Condition-Based Maintenance Setup (WM_CBM_RULE) component.

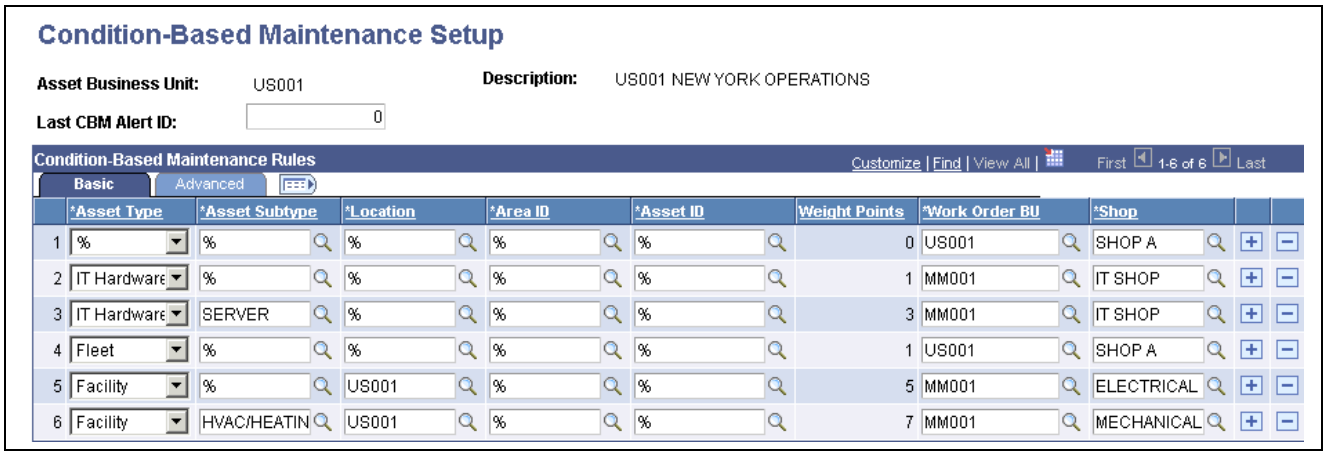
This section provides an overview of CBM rules and discusses how to define CBM rules.

Page Used to Set Up CBM Rules

Page Name	Object Name	Navigation	Usage
Condition-Based Maintenance Setup	WM_CBM_RULE	Set up Financials/Supply Chain, Product Related, Maintenance Management, Setup, CBM Rule Setup	Define CBM rules.

Defining CBM Rules

Access the Condition-Based Maintenance Setup page



Condition-based Maintenance Rules - Basic

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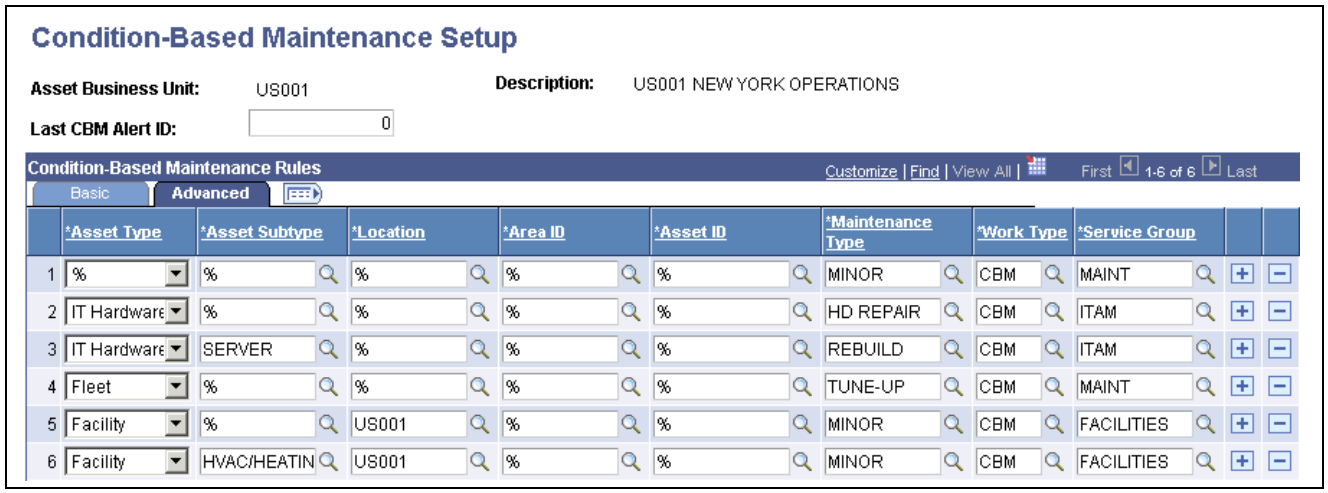

Condition-Based Maintenance Rules - Advanced

Define the CBM rules and last alert ID for the Asset Management Business Unit.

Last CBM Alert ID Enter a number. The system uses the number to generate sequential alert IDs starting with the number following your entry.

Asset Type Select a wildcard (%) to represent all asset types or select a specific asset type from your list.

Asset Subtype Select a wildcard (%) to represent all asset subtypes or select a specific asset subtype from your list.

Location Select a wildcard (%) to represent all asset locations or select a specific asset location from your list.

Area ID Select a wildcard (%) to represent all area IDs or select a specific area ID from your list.

Asset ID Select a wildcard (%) to represent all asset IDs or select a specific asset ID from your list.

Weight Points Displays the total weight for the selected values for each row. The values are Asset Type (1), Asset Subtype (2), Asset Location (4), Asset Area (8), and Asset ID (16). Wildcards = 0.

Business Unit Select the work order business unit to serve as the default value in the work order for the selected row.

You must specify a default value and cannot use a wildcard in the fields for the Business Unit, Shop, Maintenance Type, Work Type, and Service Group.

Shop Select the shop to serve as the default value in the work order for the selected row.

Maintenance Type Select the maintenance type to serve as the default value in the PM schedule for the selected row.

Work Type Select the work (order) type to serve as the default value in the work order for the selected row.

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Service Group Select the service group to serve as the default value in the work order for the selected row.

Creating and Updating a CBM Alert in PeopleSoft Maintenance Management

To create and update CBM alerts in PeopleSoft Maintenance Management use the Condition-Based Maintenance Alert (WM_ALERT) component.

This section provides an overview of CBM alerts in PeopleSoft Maintenance Management and discusses how to:

- Create a CBM alert in PeopleSoft Maintenance Management.
- Update a PM schedule.
- Create a work order.
- Review the alert status history.

Pages Used to Create and Update a CBM Alert in PeopleSoft Maintenance Management

Page Name	Object Name	Navigation	Usage
Condition-Based Maintenance Alert	WM_ALERT	Maintenance Management, Condition-Based Management, Alert	Enter a new CBM alert and respond to alerts entered manually or generated from an integrated system.
Update PM Schedule	WM_ALERT_UPD_PM_SP	Click the Update PM Schedule button on the Condition-Based Maintenance Alert page.	Update the PM schedule.
Create Work Order	WM_ADD_WO_SP	Click the Create Work Order button on the Condition-Based Maintenance Alert page.	Create a work order.
Alert Status History	WM_ALERT_STATS_SEC	Click the Status History link on the Condition-Based Maintenance Alert page.	View the status history of the alert.

Creating a CBM Alert in PeopleSoft Maintenance Management

Access the Condition-Based Maintenance Alert page.

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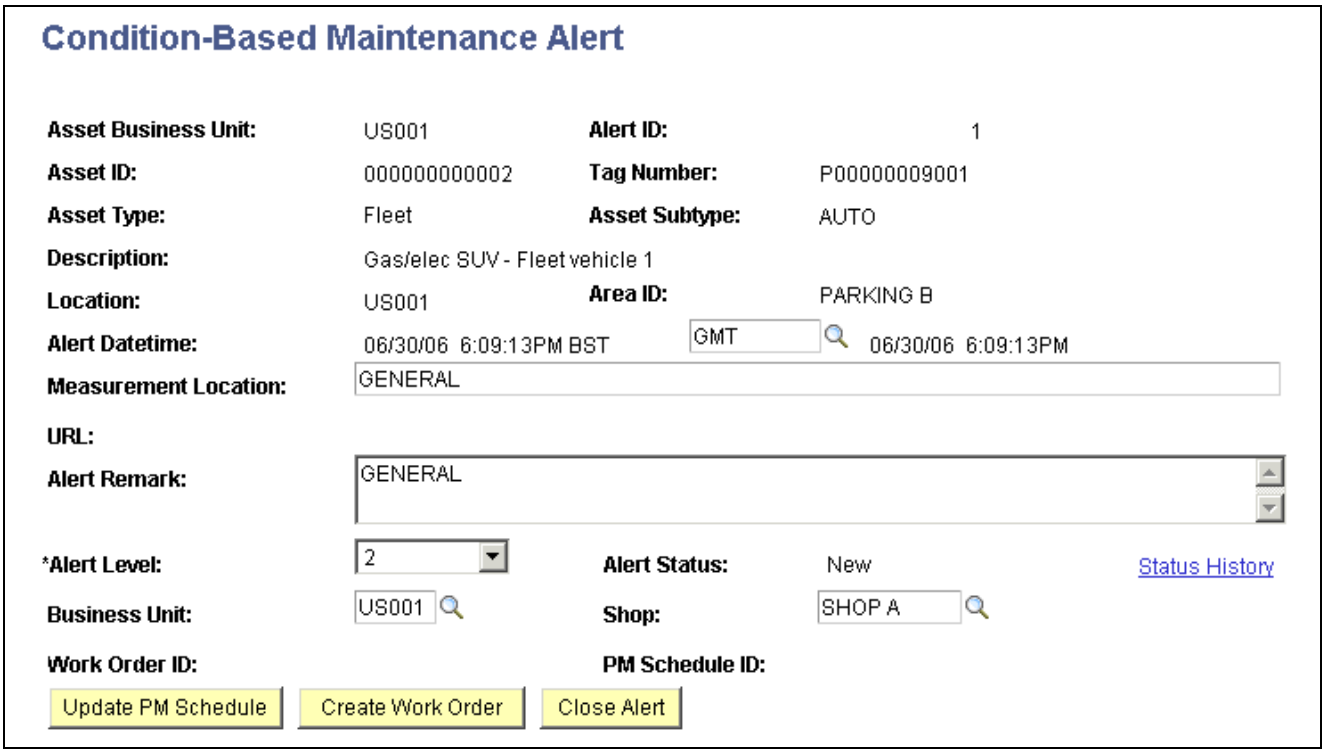

Condition-Based Maintenance Alert page

Only the CBM coordinator can add or update an alert. You must save the component before you can update the PM schedule, create a work order, or close the alert. When you save, the system sends a notification message based on workflow routing controls. If the system cannot find a corresponding CBM rule it displays *There is no matching rule found for the alert.* If the system cannot find a user for the notification it displays *There is an error in triggering workflow.* The administrator or CBM coordinator can manually correct the errors.

Alert ID Displays the alert number generated based on the last alert number.

Location Displays the location of the asset.

Area ID Displays the specific area in which the asset is located.

Alert Datetime Displays the local date and time based on a local time zone and the date and time based on GMT (Greenwich Mean Time) date and time. . If you select a local time zone that is not supported, the local date and time does not appear and the dropdown box shows *Invalid.*

Measurement Location Indicates the location where the measurement, which triggered the alert process was taken.

URL Displays the URL for the integrated monitoring system.

Alert Remark Enter additional information about the alert.

Alert Level Select a number between 1 and 5 to indicate the priority and severity of the problem.

Alert Status Indicates the status of the alert. Alert statuses are identified in Reviewing the Alert Status History.

See Chapter 11, "Setting Up and Using Condition-based Maintenance," Reviewing the Alert Status History, page 281.

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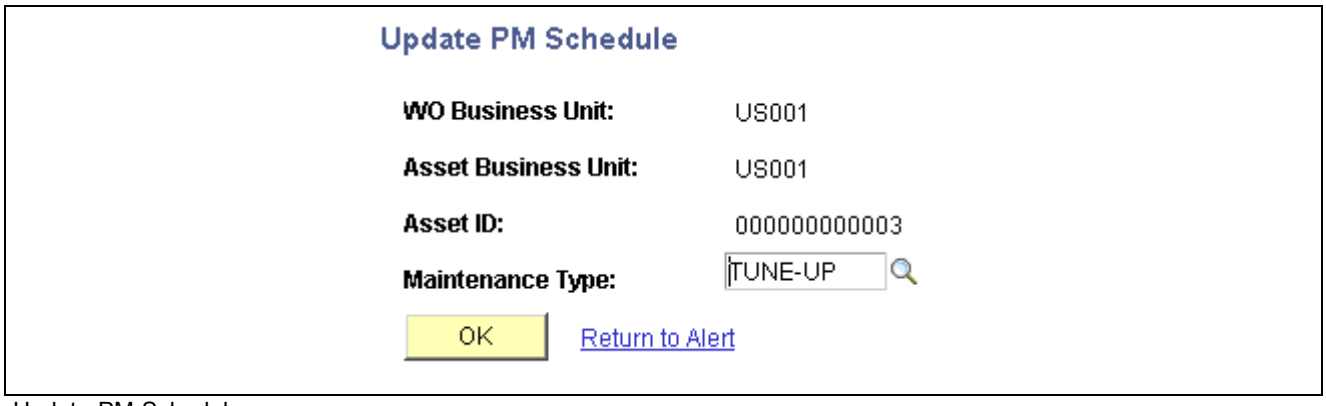
Status History	Click this link to access the Alert Status History page where you can view the status history of the alert.
Business Unitand**Shop**	Displays the work order business unit and shop based on the matched CBM rule. When you change either value on a saved alert the system asks if you want to send workflow notification of the event.
Work Order ID or PM Schedule ID	Displays the work order ID if you selected the Create Work Order button as a link to enable you to access the work order. If you selected the Update the PM Schedule button, the PM schedule ID displays as a link to enable you to access the PM schedule. **Note.** You must save the page before you can access the Update PM Schedule, Create a Work Order, and Close Alert buttons. These fields are not updated until you select one of these buttons.
Save	Click this button to save the alert and display the Update PM Schedule, Create Work Order, and Close Alert buttons.
Update PM Schedule	Click this button to access the Update PM Schedule page. See Chapter 11, "Setting Up and Using Condition-based Maintenance," CBM Work Order Creation Process, page 275.
Create Work Order	Click to take the indicated action for a saved alert. Once you take an action the Business Unit is unavailable.
Close Alert	Click this button to close the alert and update the Alert Status History page for the selected asset.

Updating a PM Schedule

Access the Update PM Schedule page.



Update PM Schedule page

Use this page to update the PM schedule. When you update the PM schedule the system updates the alert with the PM Schedule ID.

Creating a Work Order

Access the Create Work Order page.

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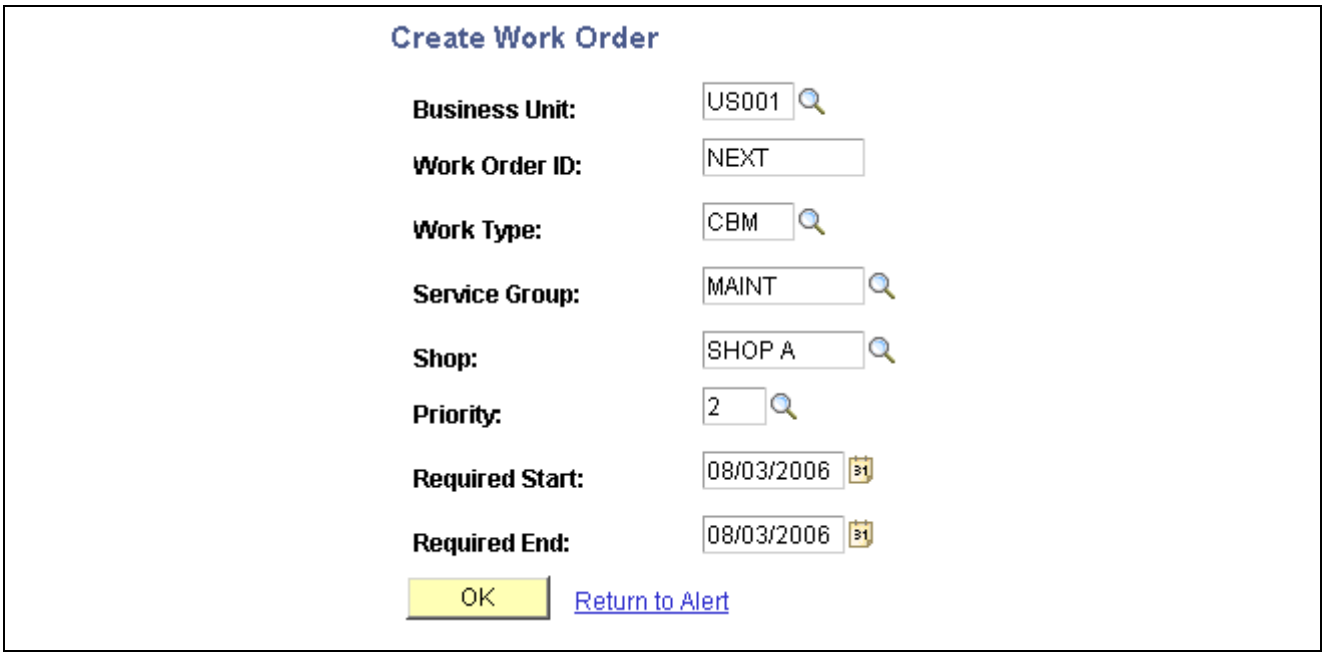
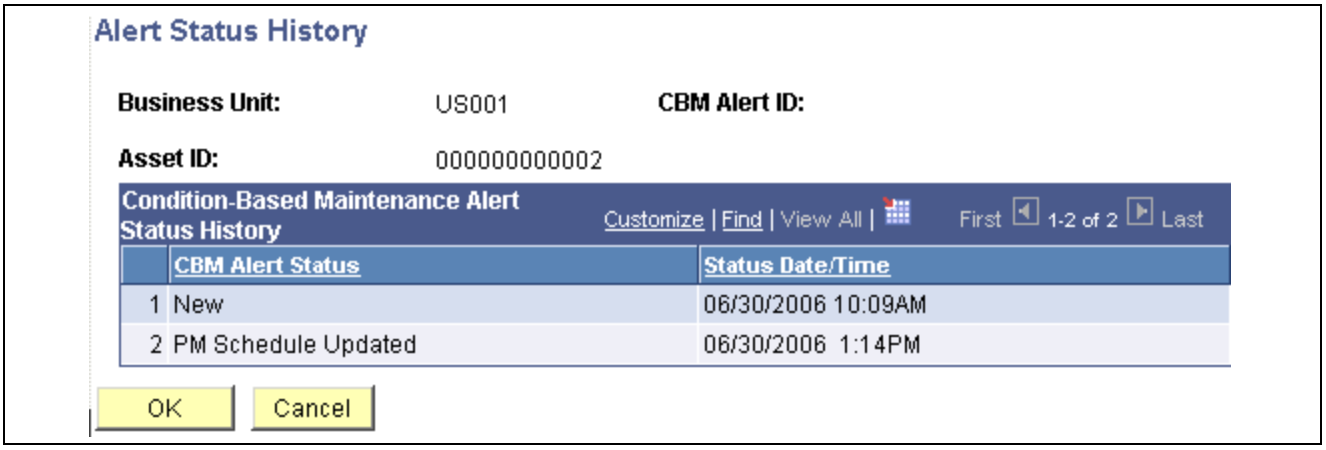


Create Work Order page

Use this page to create a work order for the alert. The CBM rule determines the Maintenance Type, Work Type, and Service Group, values unless you changed the Business Unit or Shop. When you create the work order the system updates the alert with the Work Order ID. All fields must have a value selected.

Reviewing the Alert Status History

Access the Alert Status History page.



Alert Status History page

Use this page to track the status of an alert.

CBM Alert Status(conditioned-based maintenance alert status)

Displays the status of a CBM alert. These statuses include:

- *New*
- *Error*
- *PM Schedule Updated*
- *Work Order Created*

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- *Work Order Completed*
- *Work Order Canceled*
- *Closed*

Creating a CBM Alert Using Web Services

Web Services enables an external condition monitoring system, which is monitoring an asset is being monitoring an asset, to send a SOAP (Simple Object Access Protocol) message to PeopleSoft Maintenance Management indicating that the asset is operating outside its tolerance limits. PeopleSoft Maintenance Management:

1. Receives the SOAP request message of a new alert.
2. Validates the SOAP request message.
3. Uses the matching rules to populate the work order Business Unit and Shop ID.
4. Generates the Alert Identification.
5. Triggers the workflow to notify the person with the CBM Coordinator role and matching profile.
6. Saves the alert.
7. Sends back Alert Identification to condition monitoring system in a SOAP response message.

Everything is generated automatically without an manual intervention. Setting up Web Services is the key factor, which enables the transfer of information back and forth between an external system and PeopleSoft Maintenance Management. *Enterprise PeopleTools PeopleBooks* describe, in detail, how to set up Web Services.

See *Enterprise PeopleTools PeopleBooks: "Integration Broker"*

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CHAPTER 12

Setting Up and Generating Preventive Maintenance Work Orders

This chapter provides an overview of Oracle's PeopleSoft Enterprise PeopleSoft Maintenance Management preventive maintenance (PM) work orders and discusses how to:

- Set up preventive maintenance loops.
- Set up and maintain preventive maintenance schedules.
- Run the Preventive Maintenance Process.
- Generate and analyze preventive maintenance projections.

Understanding Preventive Maintenance Work Orders

This section discusses the setup and processing of preventive maintenance work orders.

Setup and Processing of Preventive Maintenance Work Orders

PeopleSoft Maintenance Management enables users to plan, schedule, and complete an organization's routine maintenance of individual assets, groups of assets, or specific locations through the creation and processing of preventive maintenance work orders. Users can set up preventive maintenance schedules for individual assets, for preventive maintenance loops composed of multiple assets, and for specific locations where non-asset-related maintenance activities are performed on an ongoing basis. You can select one of several different scheduling options and base the scheduling on selected dates or meter readings (assets and loops only). When you run the Preventive Maintenance Process Application Engine (WM_PM), it uses information in the schedules and their associated job templates to generate work orders. You run the Preventive Maintenance Process in batch mode. Based on projection data that you set up in preventive maintenance schedules, you can run the Preventive Maintenance Process to generate projections, which enable you to plan future maintenance and determine future resource demand. You can load this data into Microsoft Project for further analysis. To generate preventive maintenance work orders, you:

- Set up work order task and work order job templates that define the resource requirements and data that is needed to perform work order tasks for a scheduled asset in a preventive maintenance work order.

  See Chapter 9, "Defining Work Order Templates," Setting Up Work Order Templates, page 244.

- Optionally, define preventive maintenance loops, which are composed of groups of similar (homogeneous) and, possibly, even dissimilar (heterogeneous) assets. Maintenance loops can be associated with preventive maintenance schedules and work order job templates and used to generate preventive maintenance work orders and projections.

  See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Loops, page 285.

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- Set up preventive maintenance schedules for single assets, preventive maintenance loops, and locations, which establish specific rules based on time intervals or meters that are associated with specific assets and are used by the Preventive Maintenance Process to control the due date of the next scheduled maintenance.

  The Preventive Maintenance Process also uses preventive maintenance schedules to provide work order header information and to provide access to the work order job template, which it uses to create preventive maintenance work orders. If the shop that is specified in the schedule allows crew scheduling, a default crew ID will appear in the preventive maintenance work order that is generated.

  See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Schedules, page 290.

- Run Preventive Maintenance Processing to apply the rules that are set up in the preventive maintenance schedules to generate preventive maintenance work orders.

  See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding the Preventive Maintenance Process, page 317.

- If you want, run the Preventive Maintenance Projections process to apply the rules that are set up in the preventive maintenance schedules to generate projection data, which can be loaded into Microsoft Project to perform forecasting activities.

  See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Projections, page 332.

Work Order Task and Work Order Job Templates

You create work order task and work order job templates to predefine the resource requirements and other data based on specified asset categories for similar types of work orders. Creating these templates reduces the amount of data entry time that is needed to create work orders. Work order task templates enable you to predefine the resource requirements and associated data for various types of maintenance and repair work orders. Work order job templates are applied at the work order header level and predefine a sequence of one or more job steps, which consist of the work order task templates that you need to complete maintenance or repair work. You must create a work order job template even if the maintenance operation consists of only one task.

You must associate a job template with each type of preventive maintenance schedule definition, which includes schedules for individual assets, for a maintenance loop, or for a location. Work order job templates that are used for preventive maintenance work orders are not set up any differently than any other work order job templates. However, you must set up these templates prior to setting up preventive maintenance loops and schedules.

For example, a fleet maintenance planner may want to set up a work order job template for the 3000 mile service of a specific line of trucks. This 3000 mile service consists of the following work order tasks:

- Change oil.
- Rotate tires.
- Inspect brakes.

You create a work order task template for each activity, defining any resource requirements, attachments, instructions, checklists, and notes for each task. You then create the work order job template, naming it *3000 Mile Service,* for example, and organize each of these tasks within the job template as job steps that are needed to complete the work order.

You can then associate this work order job template with one or more preventive maintenance schedules for this type of asset. You can also associate this work order job template with a preventive maintenance schedule that references a group of automobile assets that are defined for a maintenance loop.

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In addition, because these work order task and job templates have effective-dating, you can maintain the requirements and tasks for an individual task within a multistep job template over time. When you adjust the task in either the work order task template or the work order job template, the changes are reflected in all of the preventive maintenance schedules that either directly or indirectly reference the template. For example, if you set up a new work order task template, Emission Inspection, and add it to the 3000 Mile Service work order job template, then any preventive maintenance schedule that is associated with this job template automatically has the Emission Inspection task added to it.

See Chapter 9, "Defining Work Order Templates," Understanding Work Order Templates, page 239.

Setting Up Preventive Maintenance Loops

To set up preventive maintenance loops, use the Maintenance Loop (WM_PM_MAINT_LOOP) component.

This section provides an overview of preventive maintenance loops and discusses how to:

- Create a preventive maintenance loop.
- Search for a specific asset.

Understanding Preventive Maintenance Loops

You set up preventive maintenance loops to enable you to schedule and generate one or more work orders to perform a preventive maintenance service operation on a group of multiple similar and dissimilar, but related, assets.

Important! You must select the Multiple Asset Per Work Order check box in the appropriate work order business units to enable you to create work orders using a loop.

Preventive maintenance loops are set up for groups of:

- Assets that are similar, or more specifically, homogeneous.

  Homogeneous assets are assets for which all the assets that are listed in the loop grid share the same default asset classification parameters based on the level of specification in the loop's header. You must specify, at a minimum, the asset type and asset subtype in the loop header. For example, if you specify the asset type (fleet) and asset subtype (truck), then you can set up a loop that includes trucks from different manufacturers that are associated with job templates that are also generic in nature. In other words, the job templates and underlying task templates are not applicable for specific makes and models of trucks. Continuing the previous vehicle example, a 3000-mile checkup job template could include a task to change the oil and a task to rotate the tires, and it could be applied to vehicles from any manufacturer. In this case, you do not have to assign a job template to each individual asset. Instead, you can assign a job template in any schedule that you set up for this type of loop. When the Preventive Maintenance Process generates a work order based on this loop, the resource requirements and data that are associated with the template that is specified in the preventive maintenance loop schedule applies to all of the assets.
- Assets that are dissimilar, or heterogeneous.

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Heterogeneous assets are assets that are set up together in a preventive maintenance loop that are related to one another in some way, but do not fall under the same asset categories (asset type, subtype, manufacturer, and model). For example, an organization may use a group of different kinds of equipment to perform a specific kind of job and want the service maintenance on each piece of equipment in the group to occur at the same time to avoid having to take individual pieces of equipment in the group offline at different times. An example of heterogeneous assets would be a pickup truck from one manufacturer, a dump truck from another, and a cement mixer from a third. You may want to schedule them to be serviced on a specific day every six months. In this case, you must assign a relevant work order job template to each type of asset.

Important! You can use a heterogeneous loop only for a single maintenance situation.

You can also create a preventive maintenance loop that contains a list of homogeneous assets and heterogeneous assets. For example, you may require the use of five pickup trucks (homogeneous), a dump truck, and a cement mixer for certain kinds of jobs. You set them up in a preventive maintenance loop so that they can be scheduled for maintenance at the same time and same interval. In this case, you must assign a work order job template to the heterogeneous assets in the list (the dump truck and cement mixer). However, you can either specify a work order job template in the schedule to apply to the homogeneous assets (the pickup trucks), or specify the same work order job template in the Override Job Template field for each homogeneous asset that is listed in the loop. If you specify an override job template value for one or more assets in a loop, then you can usually use the loop in only one maintenance situation.

You use the Preventive Maintenance Process to generate work orders based on preventive maintenance loop schedules that have heterogeneous assets.

Using the previous example, you set up a loop with heterogeneous assets:

Loop's Assets	Work Order Job Template
Manufacturer A, Pickup Truck 1	Monthly Truck Service Job Template attached to Schedule.
Manufacturer A, Pickup Truck 2	Same as above.
Manufacturer A, Pickup Truck 3	Same as above.
Manufacturer A, Pickup Truck 4	Same as above.
Manufacturer A, Pickup Truck 5	Same as above.
Manufacturer B, Dump Truck	Monthly Dump Truck Maintenance Job Template.
Manufacturer C, Cement Mixer	Monthly Cement Mixer Maintenance Job Template.

The work order job template, Monthly Truck Service, contains three work order tasks: Rotate Tires, Change Oil, Check Brake Fluid.

The work order job template, Monthly Dump Truck, contains four work order tasks: Rotate Tires, Change Oil, Check Brake Fluid, and Clean Truck Bed.

The work order job template, Monthly Cement Mixer, contains two work order tasks: Lubricate Drum Turning Mechanism and Clean Drum.

A preventive maintenance loop schedule is set up to perform the maintenance monthly.

The Preventive Maintenance Process generates a work order based on the loop schedule. The requirements are applied to each work order task in the work order based on the tasks that are in the work order job templates.

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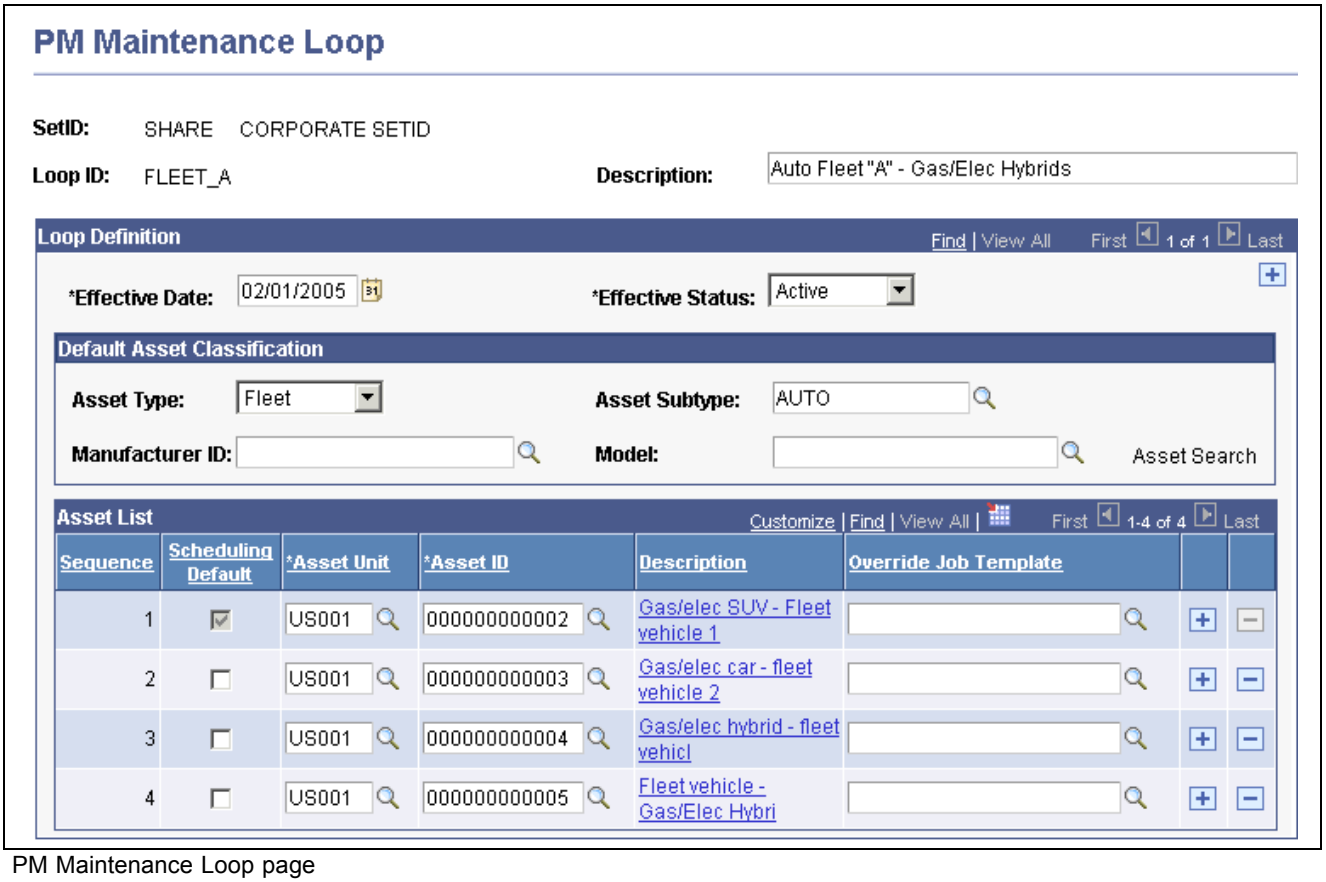
Pages Used to Set Up Preventive Maintenance Loops

Page Name	Object Name	Navigation	Usage
PM Maintenance Loop	WM_PM_MAINT_LOOP	Maintenance Management, Preventive Maintenance, PM Schedule Management Setup, Maintenance Loop	Create a preventive maintenance loop to perform routine maintenance tasks on groups of homogeneous assets or groups of heterogeneous assets.
Asset Search	WM_ASSET_SRCH_SEC	Click the Asset Search link in the PM Maintenance Loop page.	Search and copy one or more specific asset IDs to the Asset List grid in the PM Maintenance Loop page.
Asset Information	WM_WO_ASSET_SEC	Click Description link in Asset List grid on the PM Maintenance Loop page.	Review details about the selected asset.

Creating a Preventive Maintenance Loop

Access the PM Maintenance Loop page.



PM Maintenance Loop page

Asset Type, Asset Subtype, Manufacturer ID, and **Model**

Specify the asset classification values that are common to the homogeneous (similar) assets within the loop, such as *Fleet* and *Auto.* You must also select asset IDs for each asset that is listed in the Asset List grid for both

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homogeneous and heterogeneous (dissimilar) assets. The asset IDs that you select must either fall within these selected default asset characteristics, or be associated with an override template. If you select only heterogeneous asset IDs in the Asset List grid, and you select an override template for each asset ID, then you do not have to select any asset characteristics (asset type, asset subtype).

Note. For homogeneous assets, you must, at a minimum, specify both asset type and asset subtype. If you also choose to identify a model, you must also identify the manufacturer ID. You cannot skip over a member in the asset category hierarchy.

Asset Search Click to access the Asset Search page.

Note. You must specify an asset type and asset subtype at a minimum to perform the search.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Searching for a Specific Asset, page 289.

Asset List

The Asset List grid lists the homogeneous (similar) assets that you copied from the Asset Search page. You can also select individual (heterogeneous) assets and their associated business units directly in the grid.

Scheduling Default Select to indicate which asset's actual meter reading controls the scheduling of all of the assets in the Asset List. For example, if you have three different odometer readings for three cars, you must select one for the Preventive Maintenance Process to use to perform the calculations that are necessary to determine whether to create a work order.

Note. The first asset in the list is selected by default. However, you can override this default and select the check box for another asset. You can identify only one asset as the scheduling default.

Description Click to access the Asset Information page that contains details about the selected asset in the row.

Override Job Template Select a work order job template to associate with each heterogeneous asset in the grid. This association with a work order job template is required for all heterogeneous assets in the Asset List grid. You must specify a job template in this field for any asset that has classification parameters that are different from the classification parameters that are specified on the loop header for homogeneous assets.

You may optionally select a work order job template to associate with each homogeneous asset that is listed in this Asset List grid. If you specify a template here for a homogeneous asset, it overrides any template that is set up in the Loop Schedule. If this field is left blank for homogeneous assets, then the template that is specified in the Loop Schedule for this loop ID is used when the work order is created.

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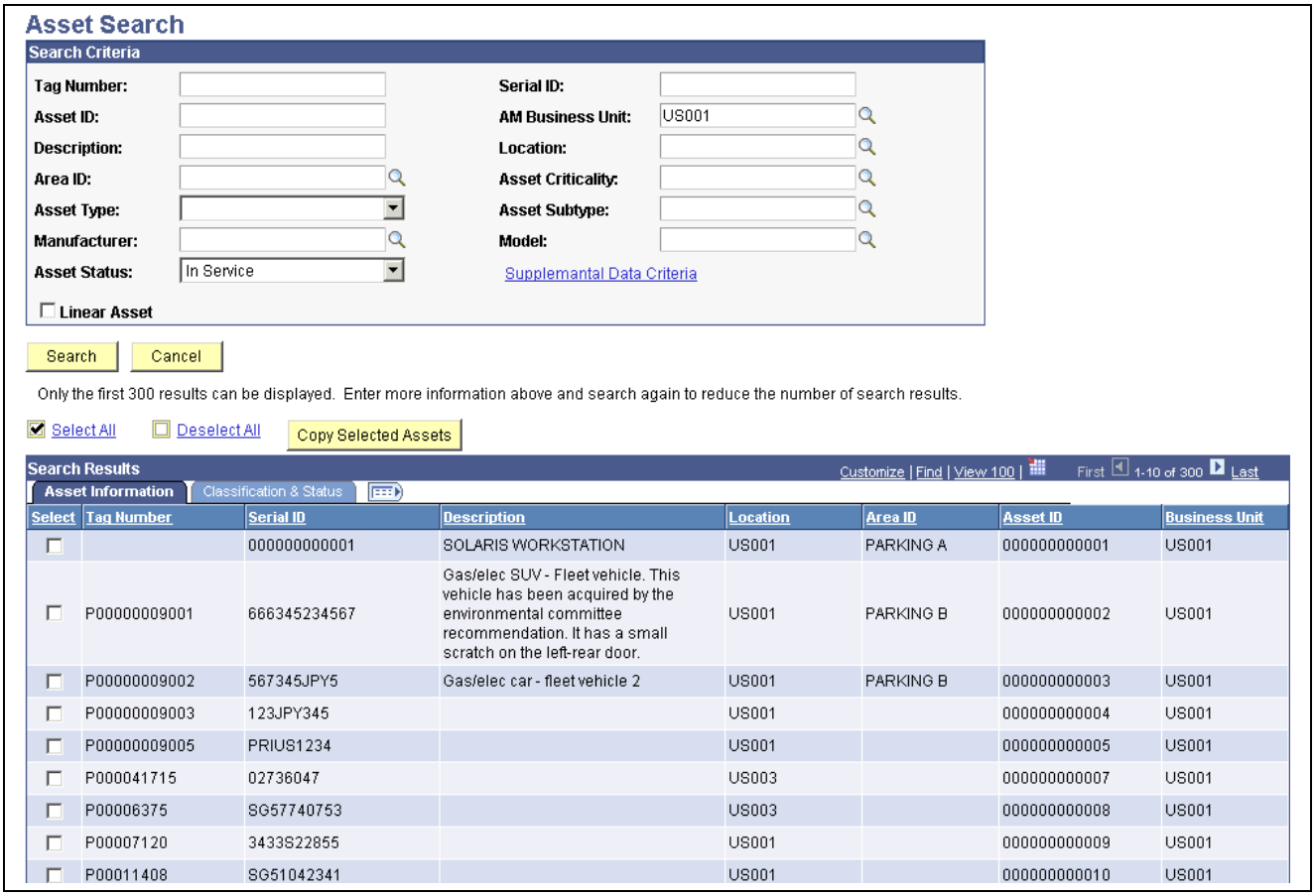
Searching for a Specific Asset

Access the Asset Search page.



Asset Search page

Search Criteria

Enter the values that are necessary to narrow the search for either homogeneous or heterogeneous assets, and click the Search button to display the assets in the Search Results.

Search Results

Select Select the check box for each asset that you want to include in the preventive maintenance loop.

Copy Selected Assets Click to copy the selected assets to the Asset List grid in the PM Maintenance Loop page.

Setting Up and Maintaining Preventive Maintenance Schedules

To set up a preventive maintenance schedule for an asset, use the Schedule (WM_PM_SCHD) component.

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To set up a preventive maintenance schedule for a loop, use the Loop Schedule (WM_PM_LOOP_SCHD) component.

To set up a preventive maintenance schedule for a location, use the Location Schedule (WM_PM_LOC_SCHD) component.

To copy a preventive maintenance schedule, use the Copy Schedule (WM_PM_SCHD_CPY) component.

To maintain preventive maintenance schedules, use the PM Workbench (WM_PM_SCHD_WRKB) component.

This section provides overviews of preventive maintenance schedules, meter ranges and condition-based maintenance preventive maintenance work orders, and projected meter readings and discusses how to:

- Create a preventive maintenance schedule.
- Set up advanced options for a preventive maintenance schedule.
- Copy a PM Schedule.
- Use the Preventive Maintenance Schedule Workbench.

Understanding Preventive Maintenance Schedules

You set up preventive maintenance schedules to enable the Preventive Maintenance Process to automatically generate work orders to use for servicing or maintaining one or more assets or a location at specified times and service intervals. A service interval refers to the frequency with which the maintenance types are performed. These intervals, which are specifically defined in the schedule, can be either date-based or meter-based. You associate a work order job template with a schedule. The job template lists the which work order task templates (steps) that contain the resource requirements and attachments that must be completed once the work order is generated. You can also define the work order header information and the project and activity to associate with the preventive maintenance work order that the Preventive Maintenance Process generates. Each preventive maintenance schedule that you set up is unique. You can set up a preventive maintenance schedule for:

- A single asset.
- A preventive maintenance loop (group of assets).
- A specific location.

  This type of schedule is used for a task that is not associated with an asset, such as scheduling the routine cleaning of the shop floor.

You set up preventive maintenance schedules and associate them with a work order business unit and a maintenance type that is defined in PeopleSoft Asset Management. If the schedule is defined for:

- A single asset, you must also associate it with an Asset Management business unit and an asset ID.
- A preventive maintenance loop, you must also associate it with a loop ID.
- A location, you must also associate it with a location code.

A schedule for an asset can incorporate both date-based and meter-based rules. In this case, the Preventive Maintenance Process looks first at the date-based rules, and if the target date is less than or equal to the current date, then the process creates a work order and ignores any meter-based rules. If, as of the current date, neither the date-based nor meter-based rules are due and the estimated meter usage is not defined, the Preventive Maintenance Process will not generate the work order until either a date-based due date or a meter-based due date comes up. However, if you set up the estimated meter usage, the system generates a work order with an estimated maintenance date.

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Work Order Business Units and Maintenance Types

You assign a work order business unit to each PM Schedule. This is the business unit that the Preventive Maintenance Process uses to create work orders and the business unit for which the work is performed.

You can assign a schedule ID to a PM Schedule, or you can set up a PM Schedule without a schedule ID and when you save the schedule, the system automatically generates a schedule ID for you. You associate each schedule with a maintenance type that you set up in PeopleSoft Asset Management. Maintenance types are user-defined and are used to divide service maintenance procedures into specific categories. You can set up as many maintenance types as you need. However, you must also set up maintenance types, which you defined in PeopleSoft Asset Management, in PeopleSoft Maintenance Management to associate each maintenance type with an asset type and asset subtype. Each preventive maintenance schedule is categorized by the type of maintenance that is being performed. For example, you can set up maintenance types as major, minor, rebuild, tune-up, 3000 mile service, 6000 mile service, and more. You also must specify either the asset, preventive maintenance loop, or location that you want to schedule for this type of maintenance.

When you define the default asset classifications in a loop, you must specify, at a minimum, the asset type and subtype. When you set up a loop schedule for this type of loop, the maintenance type that you select must be associated with the same asset type and asset subtype as the default asset type and subtype in the loop.

However, when you set up a schedule for an asset that is not associated with an asset subtype or for a location, which involves no asset, the system looks at the maintenance types that are set up in PeopleSoft Asset Management and bypasses the ones that are associated with an asset type and asset subtype in PeopleSoft Maintenance Management.

This table shows how the work order business unit is mapped to the maintenance type and asset business unit for preventive maintenance schedules:

PM Schedule Type	WO Business Unit	AM Business Unit	Maintenance Type
Single Asset	Required to create PM Schedule	Required to create PM Schedule	Required to create PM Schedule
PM Loop	Required to create PM Loop Schedule	Assigned to each asset within the PM Loop definition.	Required to create PM Loop Schedule
Location	Required to create PM Location Schedule	Not used	Required to create PM Location Schedule

Note. The work order business unit should use the same sets of data as the job template uses, which includes record groups FS_18 (items), RS_02 (labor), and AM_05 (tools).

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Setting Up Asset Maintenance Types, page 113.

See Chapter 9, “Defining Work Order Templates,” Understanding Work Order Templates, page 239.

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, “Establishing Asset Processing,” Understanding Asset Processing.

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Basis Date

The first date that you enter in the Schedule - General Options page is the Basis Date. The Preventive Maintenance Process uses this date to determine the base date for the first cycle of preventive maintenance work order generation. For example, this date is often the acquisition date of the asset. The only time this date is not used is for schedules that are set up to use a specific date. You cannot change the basis date after the first PM work order is generated for a PM Schedule. The only way that you can *reset* the basis date, such as for a major overhaul or component replacement, is to create a new PM Schedule for the asset.

Effective Dating

Effective dating enables you to change the content for a PM Schedule over time and track the changes. For example, you can change to a new date-based or meter-based rule, change the job template, select a different scheduling option, and change work order header and PeopleSoft Project Costing tracking information.

Work Order Job Templates

The Preventive Maintenance Process generates work orders with the requirement details that are specified in the work order task templates that are associated with the work order job templates. The Preventive Maintenance Process places demand on PeopleSoft Inventory for the inventory item requirements if the commitment rule that is defined in the work order business unit is either based on the parts list or a status change. If it is based on a status change, the default PM work order status must be the same as the status that is specified in the commit rules set up in the work order business unit, shop, or shop/type. If either of these commit rules apply, then the Preventive Maintenance Process also generates an Inventory Schedule for the work order. You receive an error when you save the PM Schedule online (and not in batch mode) if some of the inventory items defined in the underlying task templates that are associated with the job template in the schedule are not available because they are associated with a different Inventory business unit than the Inventory business unit that is specified in the work order business unit. You can still correct the template or you can manually include a valid item in the work order schedule after it is generated by the Preventive Maintenance Process.

If the work order job template has more than one effective date associated with it, the Preventive Maintenance Process uses the effective date in the job template, which is closest to the required start date.

For example, if the processing date is September 8, 2004, and the effective dates in the work order job template are August 8, 2004 and January 1, 2004, the Preventive Maintenance Process applies the template that is dated August 8, 2004 to the work order because it is the date that is closest to the run date of September 8, 2004.

Override Options – Generate One Time

You can select or unselect this check box on the schedule. If you select this check box, the Preventive Maintenance Process creates a work order and disregards any date-based or meter-based rules that are set up in the schedule only once. The process also removes the check mark from this option (changes it to *off*) so that the process generates a work order and considers the date and meter rules the next time you run it. If you want the process to generate another work order that disregards the date and meter rules, then you must access the Schedule page and select this option again.

A condition-based alert is issued because a meter reading for an asset exceeds the meter reading range set up in the PM Schedule. This causes the automatic selection of the Override Options — Generate One Time check box on the schedule, which causes the Preventive Maintenance Process to generate a work order.

See Chapter 12, “Setting Up and Generating Preventive Maintenance Work Orders,” Understanding Meter Ranges and Condition-Based Preventive Maintenance Work Orders, page 298.

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Threshold Percentage

The threshold percentage is used for calculating the next maintenance due date for date-based, fixed meter, and meter-based rules. It is not used for calculating the next maintenance due date for specific date and projected meter rules. When a schedule has both fixed meter rules and date-based rules and the threshold percentage is used to calculate the preventive maintenance start date, then the Preventive Maintenance Process applies the threshold percentage to rules that have a target date closest to the current date.

For example, a date-based schedule for a vehicle's maintenance is monthly and the meter (odometer) interval is every 1000 miles. The system keeps track of the percent due date-based and meter-based figures for reporting purposes. If you enter a threshold percentage in the schedule's General Options page, the Preventive Maintenance Process creates a work order if the calculated percent due for either the date-based or meter-based readings is more than or equal to the threshold percentage. In this example, if you entered a threshold percentage of 70, and the percentage of the next maintenance due for the date-based reading is 65 and the percentage of the next maintenance due for the meter-based reading is 70, then the Preventive Maintenance Process creates a work order based on the meter-based reading.

Scheduling Options

Different options are available for generating work orders based on both date-based and fixed-meter preventive maintenance schedules, which include:

- Generate the new work order only when the prior is complete.

  The Preventive Maintenance Process generates the next preventive maintenance work order for the selected asset, loop, or location only after the previously generated work order's status is marked complete.

  Note. The process generates only one work order at a time for the PM Schedule. You must mark the PM work order complete before the process can generate another work order.

- Always generate work orders based on the PM Schedule.

  The Preventive Maintenance Process generates the next scheduled preventive maintenance work order even if the status of the most recently generated preventive maintenance work order is a status other than *complete*. The Preventive Maintenance Process continues to generate a work order for the next scheduled maintenance. A good example is when users set up a schedule to perform maintenance on a fleet of cars monthly and they are unable to complete the work before the next due date. This means that the first work order has a status of open. When the next due date comes up, the Preventive Maintenance Process creates a new work order with a status of open. Even if you change the status of the generated work order to complete, canceled, or open, the selected status does not affect the generation of the next preventive maintenance work order. This is important for organizations that need a method to keep track of every scheduled maintenance, even if the maintenance was not able to be performed.

- Generate a work order if the prior work order's status is complete. If the prior work order's status is not complete, update the PM Log to identify that the scheduled work order will be fulfilled by the prior work order.

  In this case, if you do not change the status of the current open work order to complete, then on the next maintenance due date, the Preventive Maintenance Process generates the next preventive maintenance audit record, which points to the open work order. The process continues creating audit records when the next due date or meter reading is due. Each audit record provides a method of tracking preventive maintenance work which was included as part of an existing work order.

- Generate one time.

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In this case, the Preventive Maintenance Process generates a preventive or scheduled maintenance work order only once. This option is often used for equipment that is under warranty to generate a final inspection of the asset before its warranty expires. The schedule type that you can select for this scheduling option is either *None,* which is used when a schedule applies only meter-based rules, or *Specific Date.*

Note. Scheduling options do not apply to projected meter rules.

Next Maintenance Due Calculations Using Date-Based Schedules

You can create scheduling rules based on dates or time periods. The Preventive Maintenance Process uses these rules to determine when the next maintenance is due by comparing the last performed maintenance date to the current date. If the number of days between the last performed maintenance date and the current date matches the calculated interval that is defined by the date-based rules, then the Preventive Maintenance Process generates a work order.

After you select a scheduling option, if the scheduling is date-based, you must select the type of maintenance schedule (Schedule Type) that you want the Preventive Maintenance Process to use to generate work orders. The schedule types include:

- Daily

  Selecting this option means that you want to schedule the maintenance based on intervals of a specific number of days. For example, if you want the floor cleaned in the shop every two days, you enter an interval number of 2, which means that the Preventive Maintenance Process creates a preventive maintenance work order for this task every two days.

  If you select Generate the new work order only when the prior is complete as the scheduling option, then you can select the From Last PM Completion check box, which enables the system to use the completion date in the previous work order for calculating the next maintenance due date. If you do not select this check box, then the system uses the start date that is specified in the previous work order for calculating the next maintenance due date.

  Note. For the start date that appears in the work order header, the Preventive Maintenance Process compares the calculated start date against a predefined calendar that you can optionally select in the PM Options page of the work order business unit. The process searches forward to ensure that the actual start date of the preventive maintenance work order falls on the next available working day. The Preventive Maintenance Process does not validate the start date if you do not select a calendar in the work order business unit.

- Monthly by Date

  You enter the number of months between each maintenance as the number of intervals and the date of the month in which you want the Preventive Maintenance Process to create a work order for the maintenance. The Preventive Maintenance Process uses a 360-day year (twelve 30-day months) in the calculations.

  Note. For the start date that appears in the work order header, the Preventive Maintenance Process compares the calculated start date against a predefined calendar that you can optionally select in the PM Options page of the work order business unit. The process searches forward to ensure that the actual start date of the preventive maintenance work order falls on the next available working day. The Preventive Maintenance Process does not validate the start date if you do not select a calendar in the work order business unit.

- Monthly by Day

  You enter the number of months between each maintenance as the number of intervals, the week of the month, and the day of the week in the month in which you want the Preventive Maintenance Process to create a work order for the maintenance. The Preventive Maintenance Process uses a 360-day year (twelve 30-day months) in the calculations.

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- None

  You select this option when you want to use only meter-based schedules to determine the dates for the Preventive Maintenance Process to create a work order for the maintenance.

- Weekly by Day

  Enter the number of weeks between each maintenance as the number of intervals and select the day of the week in which you want the Preventive Maintenance Process to create a work order for the maintenance.

The Preventive Maintenance Process takes into account the threshold percentage that you indicate in the schedule's General Options page, as well as any blackout periods that you indicate in the schedule's Advanced Options page when it creates a preventive maintenance work order. In addition, the system calculates the percentage due for both date-based and fixed meter rules. The system compares these rules to the threshold percentage to determine the number of days before the actual next maintenance due date that the Preventive Maintenance Process should generate a work order.

The formula for calculating the percentage due for date-based rules is

Percentage Due = 100 × *(Total number of days that have passed from last maintenance date to current date) ÷ (Date interval (days))*

Note. The last maintenance date depends on your selection of a scheduling option and scheduling type. For example, if you selected the scheduling option Generate the new work order only when the prior is Complete and select the From the last PM completion check box, then the date on which you changed the work order to complete is the date used here. If you selected any of the remaining date-based schedule types (except for *None*) , the system uses the start date in the header of the last work order.

For example, if the last maintenance date was March 1, 2005, the current date is March 20, 2005, and the scheduled interval is 30 days, applying the formula 100 × 20 ÷ 30 = 66.7 percent due means that 66.7 percent of the scheduled maintenance period has passed before the next scheduled maintenance due date.

If this is the first cycle for the scheduled maintenance, then the formula is:

Percentage Due = 100 × *(Total number of days that have passed from the Basis Date specified in the schedule's General Options page to the current date) ÷ (Date interval (days))*

For example, if the basis date in the schedule is January 1, 2005 and the current date is January 25 and the cycle is every 30 days, then the percent due is 100 × 25 ÷ 30 = 80.3%.

The scheduling option that you select affects the fields that appear for the selected schedule type. This table describes the fields that appear in the Date-based Schedule group box when you select a specific schedule type after selecting a specific scheduling option:

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Scheduling Option / Schedule Type	Daily	Monthly by Date	Monthly by Day	Weekly by Day	Specific Date
Generate the new work order only when the prior is complete.	Field: Interval (days) Check box: From Last PM Completion	Fields: Interval (days) Date of Month	Fields: Interval (month(s)) Week of the Month Day of the Week	Fields: Interval (week(s)) Day of the Week	NA
Always generate work orders based on the PM Schedule.	Fields: Interval (days)	Same as above.	Same as above.	Same as above.	NA
Generate work order if the prior is complete. If prior work order is not complete, update the PM Log to identify that the scheduled work order will be fulfilled by the prior work order.	Same as above.	Same as above.	Same as above.	Same as above.	NA
Generate one time only.	NA	NA	NA	NA	Field: Schedule Date

Next Maintenance Due Calculations - Meter-based Schedules: Basic (Fixed) Meter Readings

The Preventive Maintenance Process calculates the next maintenance due date and generates a work order based on the meter rules that are defined in the General Options page of the preventive maintenance schedule. You define the fixed meter rules on the Basic tab of the grid by selecting a meter type and entering the intervals for the meter readings. The Preventive Maintenance Process uses increasing and decreasing meter types.The start date in the work order header is considered the current date. The system determines when the next maintenance is due and when to create a work order by comparing the current equipment meter reading to the next maintenance due reading, which is the last meter reading plus the interval that is defined in the preventive maintenance schedule. If the asset has multiple meters associated with it, all meter intervals that are reached first cause the Preventive Maintenance Process to trigger the automatic creation of a work order.

For example, if the last maintenance for a car was performed when its odometer reading was 7000 miles, and the meter interval specified to indicate that the next maintenance due in the preventive maintenance schedule is 1000 miles, then the Preventive Maintenance Process creates the next preventive maintenance work order when the odometer of the car reaches 8000 miles. An odometer is an example of an increasing meter type.

If you enter a threshold percentage amount, the Preventive Maintenance Process takes that number into account, as well as any specified blackout periods, when it creates a work order. For blackout periods, this means that if a meter reading interval is every 1000 miles, and the interval is reached during a blackout period, then the process does not create a work order. In addition, the Preventive Maintenance Process will not create a work order if the threshold percentage is equal to or less than the calculated percentage during a blackout period.

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Once meter readings are entered in PeopleSoft Asset Management for the asset, the Preventive Maintenance Process uses the accumulated reading in the asset's Meter Reading History to determine the next maintenance due date.

The formula that the Preventive Maintenance Process uses to determine the next maintenance due date for preventive maintenance is based on an increasing meter type. The formula is

Next Meter Reading = Last PM Work Order Meter Reading + Meter Interval

---

Important! The Last PM Work Order Meter Reading value is used only for a PM Schedule in which you selected either the Generate the new work order only when the prior is Complete, Always generate work orders based on the PM Schedule, or Generate work order if the prior is Complete scheduling option.

If the prior work order is not *complete,* the process updates the Preventive Maintenance Process log to indicate that the scheduled work order will be fulfilled by the prior work order. In this case, the Preventive Maintenance Process uses the previously calculated meter reading. Thus, you do not have to enter the last work order reading.

If this is the first preventive maintenance cycle, which means that no last preventive maintenance meter reading exists, the Preventive Maintenance Process uses zero as the lower limit reading in the formula:

Next Meter Reading = zero + Meter Interval

For example, if the lower limit for the odometer is set at 0 miles, and your maintenance interval is every 1000 miles, then the next service is based on a odometer reading of 1000 miles.

A good example of how decreasing meters are used involves the measurement of the thickness of tire tread for tires that are attached to an earth mover. The tread of these expensive tires decreases over time. Each meter reading captures the current thickness of each tire's tread. Once the reading falls below a specified value, the Preventive Maintenance Process generates a preventive maintenance work order. This is an example of how using a decreasing meter can serve as an elementary method for performing condition-based monitoring for assets that wear down or deteriorate over time. It is much more useful for this type of meter to trigger the preventive maintenance of an asset, rather than tying the reading to the tire's accumulated mileage, because an earth mover that travels over coarse gravel can wear down the tire treads much faster than an earth mover that travels on soft dirt, even if the miles traveled in the soft dirt are greater.

The formula that the Preventive Maintenance Process uses to determine the next maintenance based on a decreasing meter type is the same as the formula for increasing meters, because it uses the accumulated reading from the Meter Reading table, which is increasing and positive for both increasing and decreasing meter types. Only positive numbers can be entered for the meter interval value in the PM Schedule for both increasing and decreasing meter types.

Because these are fixed meter readings, the Preventive Maintenance Process also accounts for the threshold percentage. For example, if the threshold percentage is 80 percent, the Preventive Maintenance Process creates a work order when the calculated percentage due based on a defined meter interval reaches 80 percent. If more than one meter interval is listed , the system uses the percentage closest to the threshold percentage. The formula for calculating the percentage due is:

Percent Due = 100 × Current Reading − Previous Work Order Reading ÷ Meter Interval

For example, if the current odometer reading is 7700 miles, the previous reading was 7000 miles and the meter interval is 1000 miles, then 100 × 7700 – 7000 ÷ 1000 = 70 percent due.

If the threshold percentage is equal to or greater than 80 percent, then the system creates a work order when the calculated percentage based on the meter reading reaches 80 percent.

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Understanding Meter Ranges and Condition-Based Preventive Maintenance Work Orders

You can associate an asset with a meter type that has a tolerance range defined. You add this meter type to the Basic grid in the preventive maintenance schedule. When the meter reading falls outside this tolerance, PeopleSoft Asset Management sends a message to the in PeopleSoft Maintenance Management, which states: "Out of tolerance readings will enforce the creating of a preventive maintenance work order. Do you want to proceed?" If the user answers yes, then the system selects the Override Options – Generate one time check box in every preventive maintenance schedule that has that asset and meter type defined. The Preventive Maintenance Schedule Workbench on the CBM Alert tab is updated with the schedule ID, the override options, and the CBM source, which is the system that issued the alert. When the Preventive Maintenance Process runs, work orders are created for these preventive maintenance schedules.

See Chapter 11, "Setting Up and Using Condition-based Maintenance," page 271.

Understanding Projected Meter Readings

Projected meter readings are useful for calculating the next maintenance due as long as they are accurate. Projected meter readings can be used for:

- Maintenance that is performed by outside organizations.

  In this situation, the Preventive Maintenance Process generates a preventive maintenance work order with a start date in the near future to determine the equipment downtime and the work start date to avoid conflicts with the outside organization's external resources.

- Planning purposes.

  The maintenance planner can gain efficiency and reduce costs and prevent maintenance delays by projecting when and how often the future preventive maintenance needs to be performed.

You select the way you want the Preventive Maintenance Projection process to project the next maintenance due in the schedule's Meter-based Schedules – Advanced grid. You select from two overall methods for estimating or projecting the next maintenance due:

- Average from Asset.
- Sampling.

  Three different types of sampling methods are available.

  - Days.
  - Readings.
  - Cycles.

Note. Scheduling options do not apply to projected meters, which means that the status of the previous work order does not affect the creation of the next work order. For projected meters, the next work order will be generated when the status of the previous work order is changed to *complete*.

The objective of both the Average from Asset and the Sampling methods is to project the next maintenance due date for an asset. The difference between Average from Asset, Sampling Days, and Sampling Readings methods is based on the way the average reading per day is obtained or calculated. Once the average reading per day is calculated, average from asset, sampling days, and sample readings all use the same formula to calculate the number of days until the projected next maintenance is due.

The following table presents both examples and guidelines for using each projection method.

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Method	Guidelines	Example
Average from Asset	• Constant use or a pattern of static use (instances, level, duration). • Regular scheduled meter readings.	A delivery truck that is used for a regular, fixed route. The odometer is logged daily.
Sampling – Days	• Frequent or cyclic use. For example, the use in the last thirty days can predict the use for the next thirty days. • Regular or relatively frequent meter readings.	A service truck that is used for a fixed geographical area and has variable service calls per day. The odometer is logged weekly.
Sampling – Readings	• Infrequent use or a variable pattern of use. • Infrequent meter readings based on the use of the asset.	A rescue vehicle that responds to a large variety of calls in a multitude of geographical areas. The odometer is logged after each call.
Sampling – Cycles	• Infrequent use. • Regular meter readings.	A rescue vehicle. The odometer is logged monthly.

See *PeopleSoft Enterprise Asset Management 9.0 PeopleBook*, "Adding and Maintaining Assets," Understanding Asset Meters.

Determining Average Meter Reading Measured Per Day for Average from Asset, Sampling Days, and Sampling Readings

Before the Preventive Maintenance Process can apply the formulas described previously, the system has to determine the average meter reading measured per day for the average from asset, sampling days, and sampling readings methods.

Important! For example, if the meter type is an odometer, the average meter reading per day is equal to the average number of miles that accumulate each day based on daily odometer readings.

The Average from Asset method uses the actual average daily meter reading in the Asset Meter table as its average meter reading per day figure.

The Sampling Days method and the Sampling Readings method are very similar in the way they determine the average meter reading per day value. The difference between the two methods is the way the sample size is determined based on the readings in the Meter Reading History table. This is an example of the data that is contained in the PeopleSoft Asset Management Meter Reading History table for a particular asset's odometer meter:

Meter Reading Date	Current Meter Reading in Miles
April 30, 2004	10000
April 15, 2004	8000
April 1, 2004	7800
March 21, 2004	5000

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Meter Reading Date	Current Meter Reading in Miles
March 11, 2004	3000
February 2, 2004	2500
February 1, 2004	1000

- Sampling Days Method

  The sample size that is used in this method is based on the actual number of days that you want the system to count back based on the dates that the meter readings were taken in the Meter Reading History table from the current date.

  For example, if you enter a sample size of 60 days in the schedule and today's date is May 4, 2004, the system counts back 60 days from May 4, 2004 to the first reading date, which is March 11, 2004. The last reading date in the Meter Reading History table is April 30, 2004. If you calculate the number of days between March 11, 2004 and April 30, 2004, 50 days are between these readings.

  To calculate the average number of miles per day based on sampling days, the system uses this formula:

  (Last meter reading – First meter reading) ÷ The total number of days between the meter readings = Average miles or meter reading value per day.

  Continuing with our example using the Sampling Days method, the last meter reading was on April 30, 2004 and was 10,000 miles. The first meter reading was on March 11, 2004 and was 3000 miles. There are 50 days between the meter readings. Based on this information, you apply the formula (10,000 miles – 3,000 miles) ÷ 50 days = 140 miles per day (average miles or meter reading value per day).

- Sampling Readings Method

  The sample size that is used in this method is based on the number of readings in the table, not days, that you want the system to count back from the current date.

  For example, if you enter a sample size in the schedule of three readings and if today's date is May 4, 2004, then the first reading date is March 21, 2004 and the last reading date is April 30, 2004.

Note. The number of sample readings is based on counting the last reading date and the reading date prior to the first reading date in the Meter Reading History table, which means April 30, 2004, April 15, 2004, and April 1, 2004. The total number of days between March 21, 2004 and April 30, 2004 meter readings is 40 days.

Continuing with our example using sampling readings, the last meter reading was April 30, 2004 and was 10,000 miles. The first meter reading based on a sample reading size of 3 was March 21, 2004 and was 5000 miles. There are 40 days between the meter readings. Based on this information, you apply the formula (10,000 miles – 5,000 miles) ÷ 40 days = 125 miles per day (average miles or meter reading value per day).

Calculating the Next Maintenance Due Date for the Average from Asset, Sampling Days, and Sampling Readings Methods

Once the system calculates the average meter reading value per day for each meter-based method, it can apply the results of these calculations (from either the Average from Asset calculation, the Sampling Days calculation, or the Sampling Readings calculation) to the following formulas to determine the next maintenance due date.

The formula that is used by the Preventive Maintenance Process is based on the values that you select in the schedule's Projected From field, which are:

- *Last PM Completion Date*

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This is the date when the last preventive maintenance work order was marked complete.

- *Current System Date*

  This is the next date that the Preventive Maintenance Process will be run to generate a work order.

The formula for increasing meters if you selected a Projected From value of *Last PM Completion Date* is:

Meter Interval ÷ Average Meter Reading per Day = Number of days from the completion of the last preventive maintenance work order to the next preventive maintenance due date.

For example, if the meter interval is 2000 miles and the average meter reading per day is 140 miles per day, then 2000 ÷ 140 = 14 days. This means that the next maintenance due date is 14 days from the work order completion date.

If you selected the Projected From value of *Current System Date,* the formula for increasing meters is:

(Reading from the date that the last preventive maintenance work order was completed + Meter Interval defined in the PM Schedule) – Current Meter Reading ÷ Average Meter Reading per Day

For example, to determine the days due based on our Sampling Days example:

You select the Last PM value in the schedule. The last date that you changed the status of the preventive maintenance work order to complete was April 30, 2004, and the meter reading was 10,000 miles. The interval value that you entered for this odometer in the schedule was 2,000 miles. The current meter reading is 11,000 miles.

(10,000 miles + 2,000 miles) – 11,000 miles ÷ 140 miles per day = 7 days

Therefore, the projected maintenance due date is seven days from the last date that the Preventive Maintenance Process was run. For example, if the run date was May 1, then the next maintenance due date would be seven days from May 1, 2004, or specifically May 8, 2004.

The formula for decreasing meters is the same as it is for increasing meters because the process uses the accumulated meter reading from the Meter Reading table, which is increasing and positive for decreasing meters. The intervals must always be positive.

Important! Remember that these formulas apply exactly the same for the sampling readings and average from asset methods. The only difference is that you must use the average meter reading per day value in the formula based on the method that you choose in the Meter-based Schedules Advance grid.

Sampling Cycles Method

Sampling cycles are based on the percentage due and are projected only from the last date that you ran the Preventive Maintenance Process. The system first calculates the percentage that the maintenance is due. Next, the process calculates the number of days it took to get to that percentage. This number of days is then used to determine how many days it takes to reach 100 percent.

The formula that is used for increasing meters is:

Percentage of the preventive maintenance due for an asset = 100 × (Current Meter Reading – Meter Reading from the last completed PM work order) ÷ Meter Reading Interval

For example, the current meter reading for a truck is 10000 miles, and the meter reading for last preventive maintenance work order performed for an oil change was 7500 miles, and the interval defined for changing the oil is 5000 miles. Then the maintenance due percentage is 100 × (10000 – 7500) ÷ 5000 = 40%.

To calculate the number of days that it took to reach this percentage (40 percent):

Days = Current Date – Last PM WO Complete Date

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Continuing with the example, if it took 30 days to reach 40 percent, then it would take 45 more days for the preventive maintenance to be 100 percent due.

The formula that is used to calculate the number of days left to reach the maintenance date is:

Number of days left = 30 days × (100 – 40) ÷ 40 = 45 days.

Note. If a last PM WO completion date is not available (for first cycles), the system uses the Basis Date that is defined in the schedule, which can be the same date as the date that the asset was acquired or put in service, if applicable. If no meter reading is available from the last maintenance completed (for first cycles), the system uses zero as the lower limit. This also applies to the Average from Asset, Sampling Days, and Sampling Readings projected data.

Advanced Scheduling Options

This page enables you to define default values for the work order header. Values that you enter in this page override values that are set up elsewhere, such as the work order business unit.

The default shop that you specify determines whether the preventive maintenance work orders that are generated require crew scheduling.

See *PeopleSoft Enterprise Asset Management 9.0 PeopleBook*, "Adding and Maintaining Assets," Maintaining Asset Meters.

Blackout Periods

You can specify blackout periods on the PM Schedule Advanced Options page. Blackout periods are periods when the selected asset is unavailable for maintenance. For example, seasonal assets, such as snow-plowing equipment, may not be available for routine maintenance until the snow season ends. These periods are used in the calculation of the next maintenance due dates for all date-based and meter-based schedules, except for schedules using a specific date. If the next maintenance due date falls within a specified range of blackout dates, the Preventive Maintenance Process will not, under any circumstances, generate a work order.

PeopleSoft Project Costing Data

You can set up PeopleSoft Project Costing data for a preventive maintenance work order here, or else the system will create the work order with the default project ID and generate an activity ID. When you save a PM Schedule, the system verifies that a default project exists.

If this preventive maintenance work order is associated with a Project Costing-managed project, then you can select both the project ID and the activity ID. Only one project activity is associated with all the work order tasks that are performed for a preventive maintenance work order.

If the preventive maintenance work order is associated with a work order-managed project, then you can select the project ID and the activity is generated automatically when the Preventive Maintenance Process creates the work order. If you leave both of these fields blank in the schedule for a work order-managed project, the Preventive Maintenance Process assigns the project ID and the activity ID based on the work order business unit, work order type, and service group values that you entered in the schedule.

When you access the Preventive Maintenance Schedule Workbench, the Project tab has a field that indicates whether the project that is associated with a preventive maintenance work order is associated with a Project Costing-managed project or a work order-managed project.

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Duration Multiple

This field appears only in the Advanced Option page of the Loop Schedule component. You can use this field to increase the preventive maintenance work order duration by multiplying the value of this field by the value of the duration field in the work order job template.

For example, if a loop has three similar assets, and the associated job template has one or more sequential tasks (100 percent dependent) that total 8 hours, then if:

- You want the system to perform a parallel operation on the assets, you do not enter any multiple and the duration in the work order header is 8 hours.
- You want the system to perform a sequential operation on the assets, then you enter a multiple of 3, which is multiplied times 8 hours, which means the duration in the header is 24 hours.

Copy Schedules

Use this feature to copy the PM Schedule for similar individual assets to expedite the schedule that is set up for newly acquired assets. You define one PM Schedule and copy or clone this PM Schedule for multiple assets. When you select the asset ID that is associated with the schedule that you want to copy in the Copy From section, the date in the AM Business Unit, Asset Field, and Asset Type fields appears in the Copy To search criteria. Values may appear in additional fields depending on the asset ID that you select in the Copy From section. The system searches for and lists all of the assets that fall within the search criteria. You can then select the target asset to which you want to copy the *Copy From* asset's schedule.

PM Schedule Workbench

The PM Workbench enables you to review all of the active preventive maintenance schedules that you created for a specific asset. Three different methods are available to search existing PM Schedules, which include:

- Searching for the asset identified in a PM Schedule.

  You must enter the Asset Management business unit under which the asset was set up and select the asset ID.

- Searching for the asset location that is identified in a PM Schedule.

  You must enter the Asset Management business unit, the location of the asset that is associated with the PM Schedule.

- Searching for the work location, which is where the preventive maintenance work will be performed.

  This search option is useful for searching for location schedules that are not associated with an asset. You must enter the work order business unit that is associated with each schedule and the location where the work will be performed.

Once you perform the search, a list of PM Schedules appears on the workbench. You can click the Edit link to access any of the listed schedules. The workbench tabs include:

- PM Schedule Info

  This tab enables users to click a link and edit a specific PM Schedule. Users can review on the workbench a description, the maintenance type that is associated with each schedule, whether a meter is used, whether any blackout periods exist, a threshold percentage, and the basis date of each schedule listed.

- PM Loop Info

  This tab enables users to access and edit any PM loop schedules that are listed. Users can also review the PM maintenance loop definition that was used to create the PM Loop Schedule.

- Work Order Info

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This tab enables users to review the work order business unit, job template, shop, work type, service group, priority code, service group, approval status, internal status, and work order description that is associated with each schedule.

- Date Options

  This tab enables users to review each schedule type, any intervals, the week (if applicable), the date of the month (if applicable), the day (if applicable), and whether the next maintenance due date is calculated from the completion date of the last preventive maintenance work order.

- Scheduling Option

  This tab enables users to review the scheduling option that is selected for each preventive maintenance schedule.

- Project

  This tab enables users to review the PC business unit, project, and activity that are associated with each of the PM Schedules in the list. A WO managed column is also available, which indicates whether the project that is associated with the schedule is a work order-managed project.

- CBM Alert

  This tab enables users to review the override options, which indicate whether the system should override selected scheduling options and generate a work order, and the CBM source, which is the monitoring system that initiated the alert, for conditional-based maintenance work orders.

- Last Reviewed

  This tab enables users to review when and who last reviewed each PM Schedule that is listed.

You can also review any meters that were used to determine the next maintenance due date for the selected asset. This grid displays whether the meter is an increasing or decreasing meter, the unit of measure that is used for the readings, the calculation method that is used, and whether the next due date will be projected from the completion date of the last preventive maintenance work order, the system date, or neither. You can click a link to access the Meter Readings History for the meter and asset. You can click another link to access a Meter Readings Trend Chart for a listed meter, which displays the meter readings over a series of meter reading dates and times.

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Pages Used to Set Up and Maintain Preventive Maintenance Schedules

Page Name	Object Name	Navigation	Usage
PM Schedule - General Options	WM_PM_SCHD_PG1	• Maintenance Management, Preventive Maintenance, PM Schedule Management Setup, Schedule • Maintenance Management, Preventive Maintenance, PM Schedule Management Setup, Loop Schedule • Maintenance Management, Preventive Maintenance, PM Schedule Management Setup, Location Schedule	Define the date-based and meter-based rules for the Preventive Maintenance Process to use in determining the next due date upon which to generate a preventive maintenance work order.
PM Schedule - Advanced Options	WM_PM_SCHD_PG2	Select the Advanced Options tab.	Define work order header specifications, which are optional, that the Preventive Maintenance Process uses when it creates a work order and also define blackout periods to apply to the scheduling rules that are set up on the General Options page.
Copy PM Schedule	WM_PM_SCHD_CPY	Maintenance Management, Preventive Maintenance, PM Schedule Management Setup, Copy Schedule	Copy data from an existing PM Schedule to a new PM Schedule.
Preventive Maintenance Schedule Workbench	WM_PM_SCHD_WKBC	Maintenance Management, Preventive Maintenance, PM Schedule Management Setup, PM Schedule Workbench	Maintain an asset's preventive maintenance schedules.
Meter Readings History	WM_PM_SCHD_WKBC	• Click the View link in the Meter grid of the Preventive Maintenance Schedule Workbench. • Asset Management, Service and Maintenance, Asset Meter Information, Meter Reading History	Review the date, time, and readings for a specific meter type.
Meter Readings Details	AM_MTR_RD_HID	Click the Details link in the Meter Readings History page.	View details about the meter reading history for an asset including the date and time, source, operator ID, and daily average.

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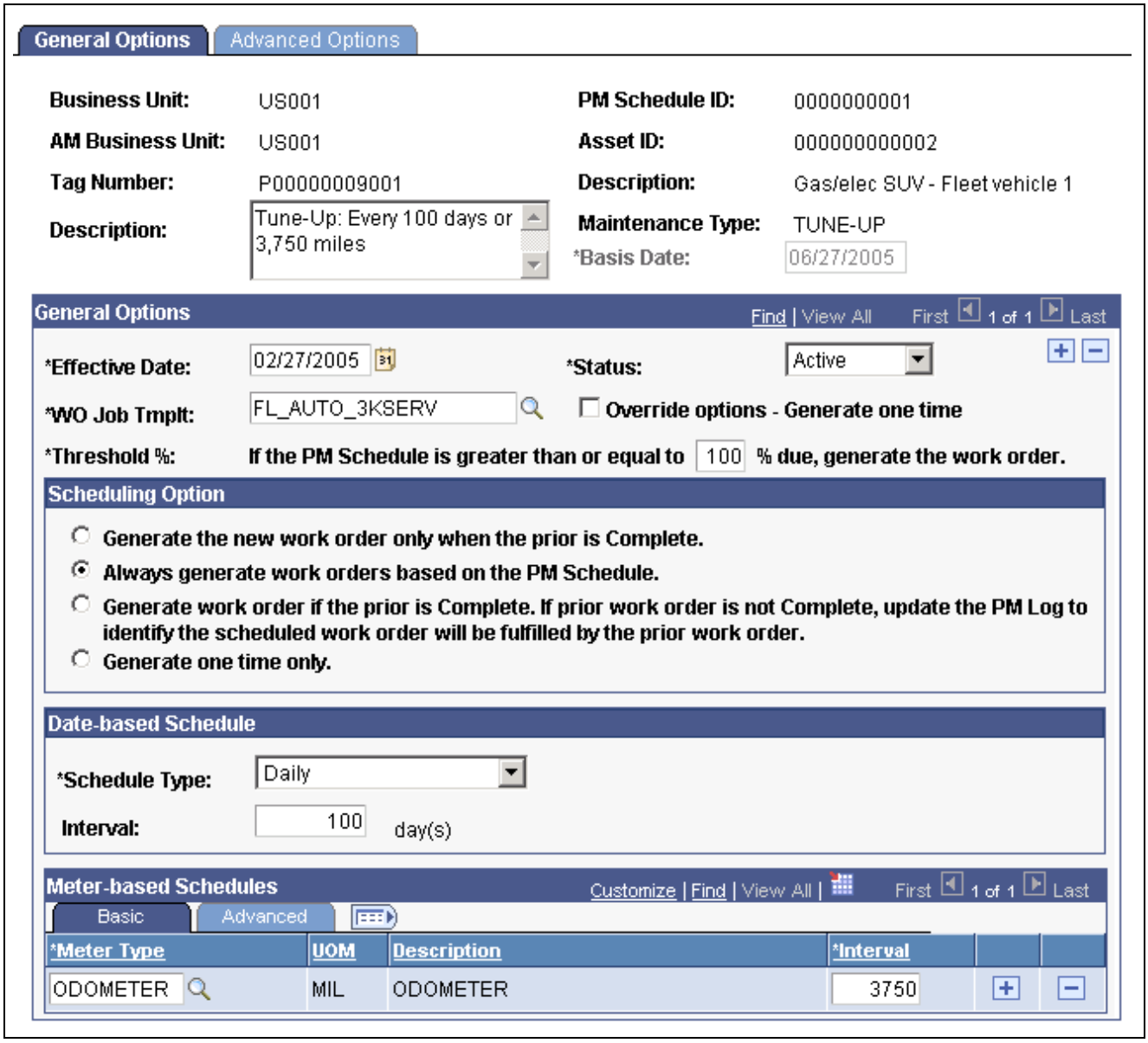
Creating a Preventive Maintenance Schedule

Access the PM Schedule - General Options page.



PM Schedule – General Options page

Description Define the purpose of the preventive maintenance work order and describe, briefly, the scheduling rules and intervals being defined in this schedule.

Basis Date Enter the date that you want the Preventive Maintenance Process to use as the base date for the first cycle of generating a preventive maintenance work order. For example, this date is often the installed or in-service date of the asset. The only time that this date is not used for a schedule is when you enter a specific date for the maintenance to occur.

Note. The Basis Date field becomes unavailable for selection in the PM Schedule after the first work order is generated.

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WO Job Template (work order job template)

Select a work order job template to define the job steps, requirements, and associated data to apply to the work order that is generated by the Preventive Maintenance Process. This template is used unless an overriding template is specified in the preventive maintenance loop definition.

Override options - Generate one time

Select to enable the Preventive Maintenance Process to bypass any scheduling rules and force the creation of a work order in the next run of the PM Process. The system clears this check box after the work order is created.

This check box is automatically selected when PeopleSoft Asset Management issues a CBM alert based on a meter reading exceeding its range tolerance for the schedule's asset. The Preventive Maintenance Process looks at this check box and generates a condition-based maintenance work order.

Scheduling Option

Select the method that you want to use to schedule this preventive maintenance work order:

- Generate the new work order only when the prior is Complete.
- Always generate work orders based on the PM Schedule.
- Generate work order if the prior is Complete. If prior work order is not Complete, update the PM Log to identify the scheduled work order will be fulfilled by the prior work order.
- Generate one time only.

Note. The only Schedule Type values that appear when you select Generate one time only are *None* and *Specific Date.*

Threshold % (threshold percent)

Enter a value to instruct the system to force the due date for the preventive maintenance work to occur earlier than the scheduled date based on the percentage that is entered here.

Note. You should set the threshold below 100 percent, especially when a long lead time is required to acquire materials, services, and tools that are required to perform the scheduled maintenance that is associated with the PM Schedule.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Schedules, page 290.

Date-based Schedule

Schedule Type

Select the type of date-based schedule for the Preventive Maintenance Process to use to generate a preventive maintenance work order. These values vary depending on the scheduling option that you choose.

- *Daily*

  The Preventive Maintenance Process calculates the next maintenance due date based on the number of days that you enter between each maintenance. The fields that appear when you select this option are:

  - From Last PM Completion

    The Preventive Maintenance Process calculates the next maintenance due date based on the date that you changed the last preventive maintenance work order to complete.

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- Interval - day(s)

  Enter the number of days between each maintenance.

- *Monthly by Date*

  The Preventive Maintenance Process calculates the next maintenance due and creates a work order based on the number of months between the last work order start date and the date in the month that you select for this option. The fields that appear when you select this option are:

  - Date of the Month.

    Select the date of the month in which you want the Preventive Maintenance Process to create a work order.

    Note. Because February has 28 days three out of every four years, if you enter *29, 30,* or *31* in this field, the system generates a work order for February on the last day of the month. If you want to guarantee that the system always generates a work order on the last day of the month based on the interval that you specify, enter *31* in the Date of the Month field.

  - Interval - month(s)

    Enter the number of months between each maintenance.

- *Monthly by Day*

  The Preventive Maintenance Process calculates the next maintenance due and creates a work order based on the number of months between the last work order start date and the day in the week of the month that you select for this option. The fields that appear when you select this option are:

  - Week of the Month

    Select the week in which you want the Preventive Maintenance Process to create a work order.

  - Day of the Week

    Select the day in the week in which you want the Preventive Maintenance Process to create a work order.

  - Interval - month(s)

    Enter the number of months between each maintenance.

- Weekly by Day

  The Preventive Maintenance Process calculates the next maintenance due and creates a work order based on the number of weeks since the last work order start date and the day in the week that you select for this option. The fields that appear when you select this option are:

  - Day of the Week

    Select the day that you want the Preventive Maintenance Process to create a work order.

  - *Interval- Week(s)*

    Enter the number of weeks between maintenance.

- *None*

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Select this option when you want to use only meter readings and not date-based readings to determine the next maintenance due for this schedule.

- *Specific Date*

  The Preventive Maintenance Process calculates the next maintenance due and creates a work order based on a specific date that you enter. The field that appears when you select this option is Schedule Date, in which you enter a specific maintenance due date. You select this option after selecting the scheduling option Generate one time only

  Note. If you specified a Threshold % on the schedule and selected this option, the threshold percentage value will be ignored.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Work Orders, page 283.

Meter-based Schedules – Basic

Select the Basic tab.

Meter Type Select a type of meter, which is set up in PeopleSoft Asset Management. The default description and the UOM (unit of measure) that are defined for the selected meter type appear.

Interval Enter the specific increasing or decreasing amount that you want the meter to measure, which the system uses to calculate the next maintenance due date. For example, if the asset is a vehicle and the meter is an odometer, enter the number of miles that needs to accumulate before the Preventive Maintenance Process creates a preventive maintenance work order for the vehicle that requires servicing.

The Interval field does not appear for meter types that use a meter range, such as a battery. When this type of meter is out of range, PeopleSoft Asset Management sets the Override Options – Generate one time check box to yes (selected). When the Preventive Maintenance Process runs, it generates a condition-based maintenance work order that is based on the alert.

Note. You must always enter a positive value for either increasing or decreasing meter measurements.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Schedules, page 290.

Meter-based Schedules- Advanced: Estimate Meter Usage is Average from Asset

Select the Meter-based Schedules - Advanced tab. The values in this grid change based on the value that you select for Estimate Meter Usage.

Estimate Meter Usage Select *Average from Asset.*

The Preventive Maintenance Process and the Preventive Maintenance Projection process both calculate and project the next maintenance due date using the average meter reading from the PeopleSoft Asset Management meter table. Selecting this value displays these Projected From options:

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- *Last PM Completion Date*

  Select to enable the Preventive Maintenance Process to determine the next preventive maintenance due date based on the last date on which you changed the status of the preventive maintenance work order that is associated with this schedule to complete.

- *Current System Date*

  Select to indicate the basis date that the Preventive Maintenance Process uses to calculate the next due date.

Select *Sampling* to determine the next maintenance due date based on one of three methods. The fields that appear when you select this option are described in the next section.

Note. If you select *None* for the Estimate Meter Usage value, the Preventive Maintenance Process generates a preventive maintenance work order based on the interval amount that is indicated in the Basic grid. For example, if you specify an interval of 2000 miles between vehicle services, the system generates a preventive maintenance work order every time its odometer increases by 2000 miles from its last preventive maintenance service.

Meter-based Schedules- Advanced: Estimate Meter Usage is Sampling

Select the Meter-based Schedules – Advanced tab and select *Sampling* in the Estimated Meter Usage field to display the following options:

Sampling Method

Select one of the methods in the list. Sampling methods are used to calculate averages based on an asset's meter-reading history to determine the next preventive maintenance due date.

The sampling methods include:

- *Cycles*

  Selecting this option projects the next maintenance due based on the calculation of the percentage of maintenance due.

- *Days*

  Selecting this option displays the following fields:

  - Sampling Size

    Enter the number of days that you want to use in the calculation the next maintenance due date.

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- Projected From

  Selecting this option displays the *Current System Date* and *Last PM Completion Date* values. These values are the same as defined for the *Average from Asset*option.

  The Preventive Maintenance Process and the Preventive Maintenance Projection process calculate the average number of meter readings per day based on the Meter Reading History tables in PeopleSoft Asset Management and the number of days that you specify in the Sampling Size field. Then, depending on whether you select *Current System Date* or the *Last PM Completion Date,* the processes calculate the number of days until your next preventive maintenance due date. These values are also used by the Preventive Maintenance Projection process to create projections that you can load into Microsoft Project.

• *Readings*

Selecting this option displays the following fields:

- Sampling Size

  Enter the number of meter readings in the meter reading history that you want the Preventive Maintenance Process to use to calculate the next preventive maintenance due date.

- Projected From

  Selecting this option displays the *Current System Date* and *Last PM Completion Date* values.

  The Preventive Maintenance Process calculates the average number of readings per day and then uses this figure to calculate the number of days from the current system date or date of the last PM completion date, which is used to determine the date for the Preventive Maintenance Process to create the next work order. These values are also used by the Preventive Maintenance Projection process to create projections that you can load into Microsoft Project.

  See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Work Orders, page 283.

Setting Up Advanced Options for a Preventive Maintenance Schedule

Access the PM Schedule - Advanced Options page.

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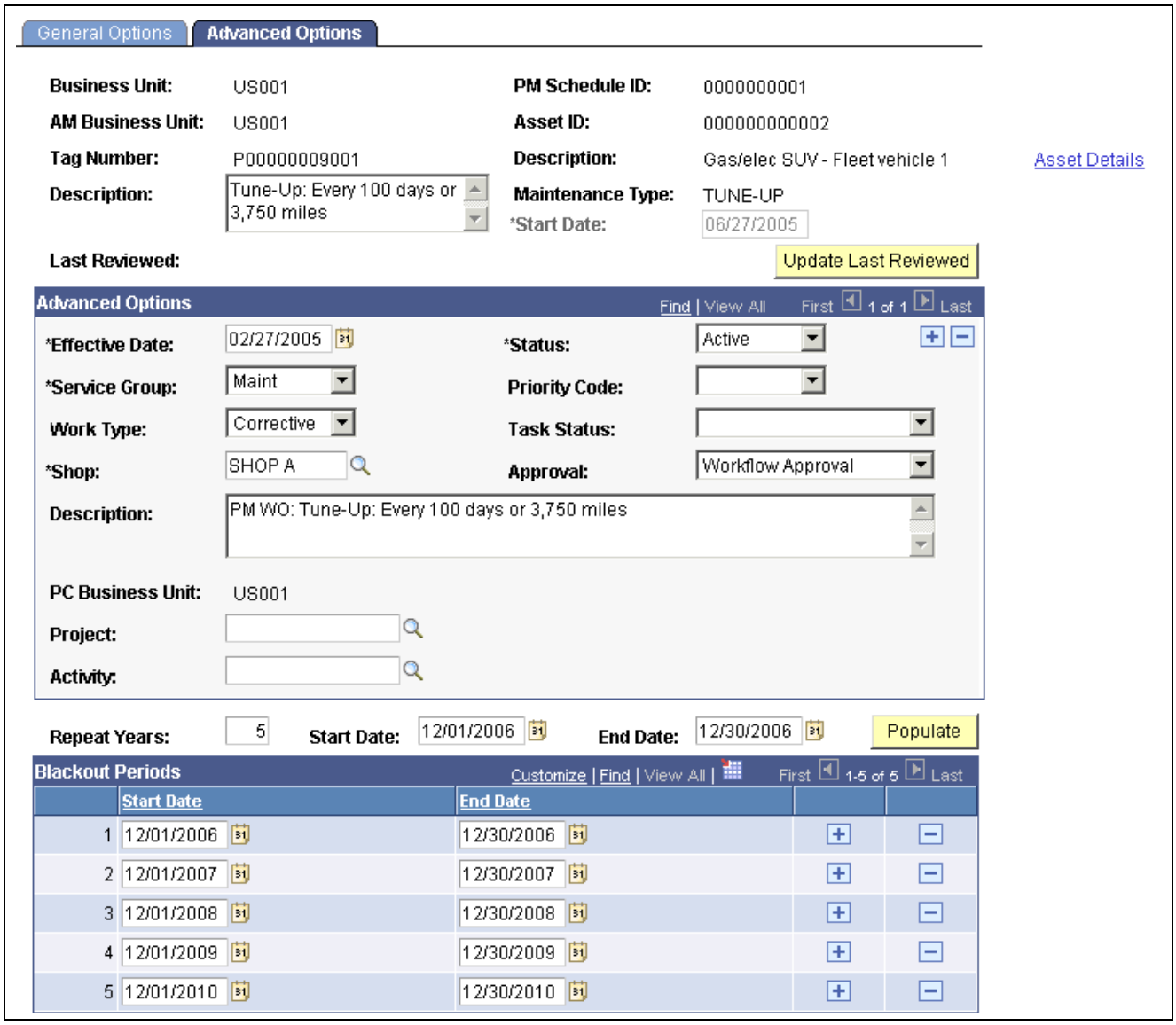

PM Schedule - Advanced Options page

Update Last Reviewed Click to update the date and time in the preventive maintenance schedule and indicate that the preventive maintenance schedule has been reviewed. The value that is shown in the field can then be used to determine when the schedule was last reviewed and who reviewed it. The date, time, and user ID appear in the Last Reviewed field.

Service Group, Work Type, Shop, and **Priority Code** Specify the default values for the preventive maintenance work order header. The work order Business Unit field acts as the set control field for the Service Group, Work Type, Priority Code, and Task Status fields.

Note. The Preventive Maintenance Process uses the work order business unit, job template, and preventive maintenance schedule as the hierarchy for retrieving default values for the preventive maintenance work order.

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Task Status Select a task status to apply to the work order. This status must be the same at every level of the work order. Specifying a status at this level overrides the status that is set up in the work order business unit.

Approval Select whether this work order is *Pre-Approved* or requires *Workflow Approval*. When you select a value in this field, it overrides whatever value is set up in the work order business unit, the shop, or the work type.

Description Enter the description of this preventive maintenance that you want to appear in the work order. This is a required field in the work order.

PC Business Unit (Project Costing business unit) Displays a default value based on the specification in the work order business unit.

Project ID and **Activity ID** Enter values for both of these fields if the preventive maintenance work orders that are generated by the Preventive Maintenance Process based on this schedule are associated with a Project Costing-managed project.

If the preventive maintenance work orders that are generated by the Preventive Maintenance Process based on this schedule are associated with a work order-managed project, perform one of the following activities:

- Leave both fields blank. The system finds and uses default project information based on the values in the work order Business Unit, Work Type, and Service Group fields. When you save the PM Schedule, the system verifies that a default project exists. The Preventive Maintenance Process generates the activity for the work order.
- Specify the project and leave the Activity field blank. The system verifies that this is a work order-managed project, and the Preventive Maintenance Process generates the activity when it creates the work order.

Work Order Duration Multiplier The system displays this field only in the Loop Schedule - Advanced Options page. The default value is *1*. The Preventive Maintenance Process calculates the duration for a preventive maintenance work order based on the value residing in the Duration field that is defined for an asset in the associated work order job template.

Repeat Years Specify the number of years for which you want to create blackout periods and specify the start date and end date for the blackout period that you want to repeat.

Populate Click to add the successive blackout period rows to the Blackout Period grid based on the number of repeat years and start and end dates that you entered.

Blackout Periods Specify the start date and end date for each blackout period that you add. Blackout periods are often used for seasonal assets, such as snow-plowing equipment. The Preventive Maintenance Process does not generate preventive maintenance work orders during the blackout periods that are specified in this schedule.

Note. These periods are taken into consideration for date-based schedules (except for specified dates) and all types of meter-based schedules.

Copying a PM Schedule

Access the Copy PM Schedule page.

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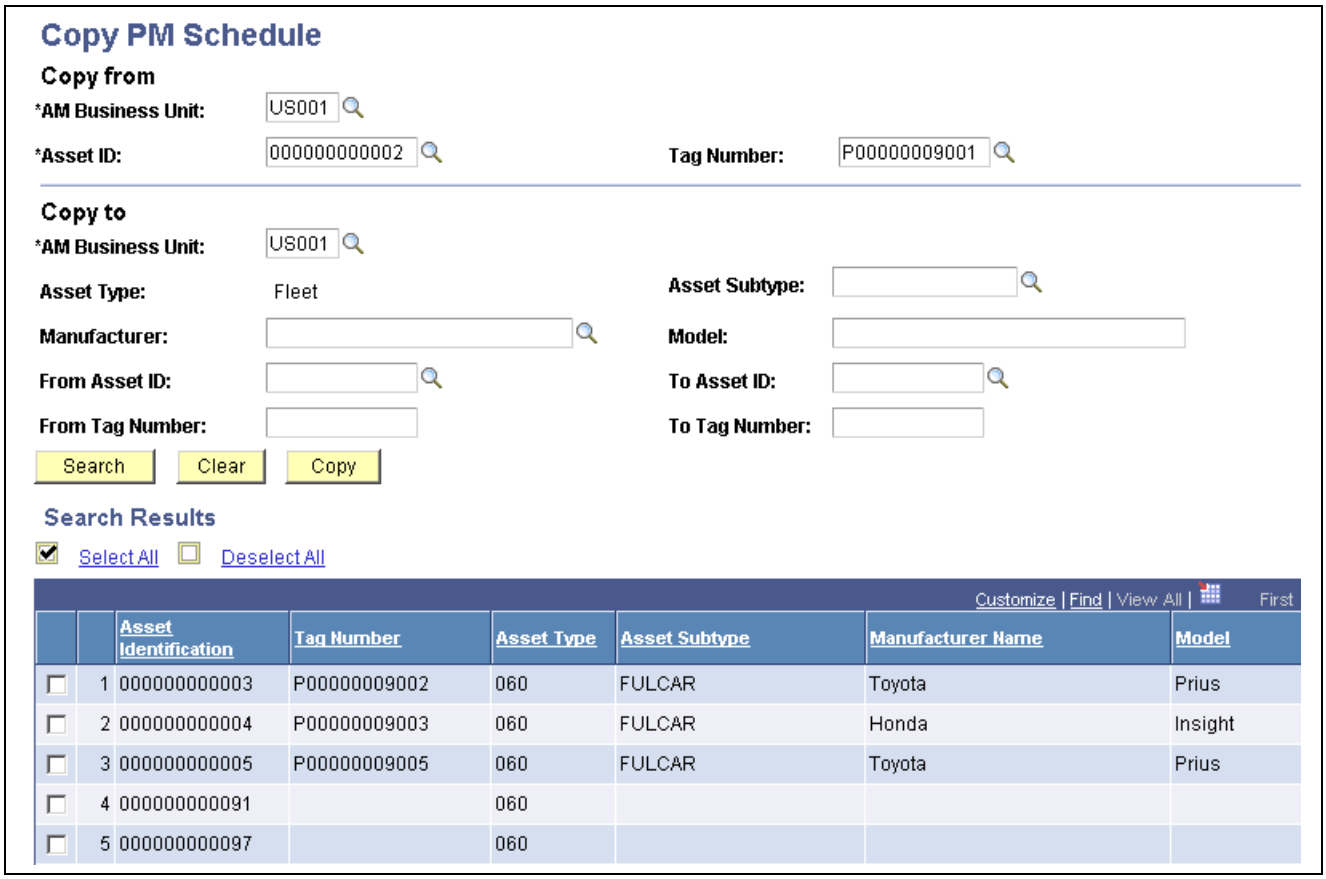

Copy PM Schedule page

Search Click to display a list of assets in the Search Results grid based on the criteria that you set up in the Copy To group box.

Copy Select the target assets from the Search Results group box to which you want to copy the selected copy from asset's schedule. Once the schedule is copied to the selected assets, then you can review and modify the new schedules of the assets by selecting Preventive Maintenance Schedule Setup, Schedule.

Copy From

Select the Asset Management business unit that is associated with the asset PM Schedule from which you want to copy. When you select the asset ID that is associated with the schedule from which you want to copy, the AM business unit and the asset type values appear in the fields in the Copy To group box of the page. Additional field values may also appear depending on the asset ID that you select in the Copy From group box on the page.

Note. The only assets that appear in the list are assets that are associated with a PM Schedule.

Copy To

AM Business Unit (Asset Management business unit) Select a business unit to narrow the search for the target assets to which you want to copy the preventive maintenance schedule. When you select an asset ID in the Copy From group box, the AM Business Unit and Asset Type values appear in this Copy To group box.

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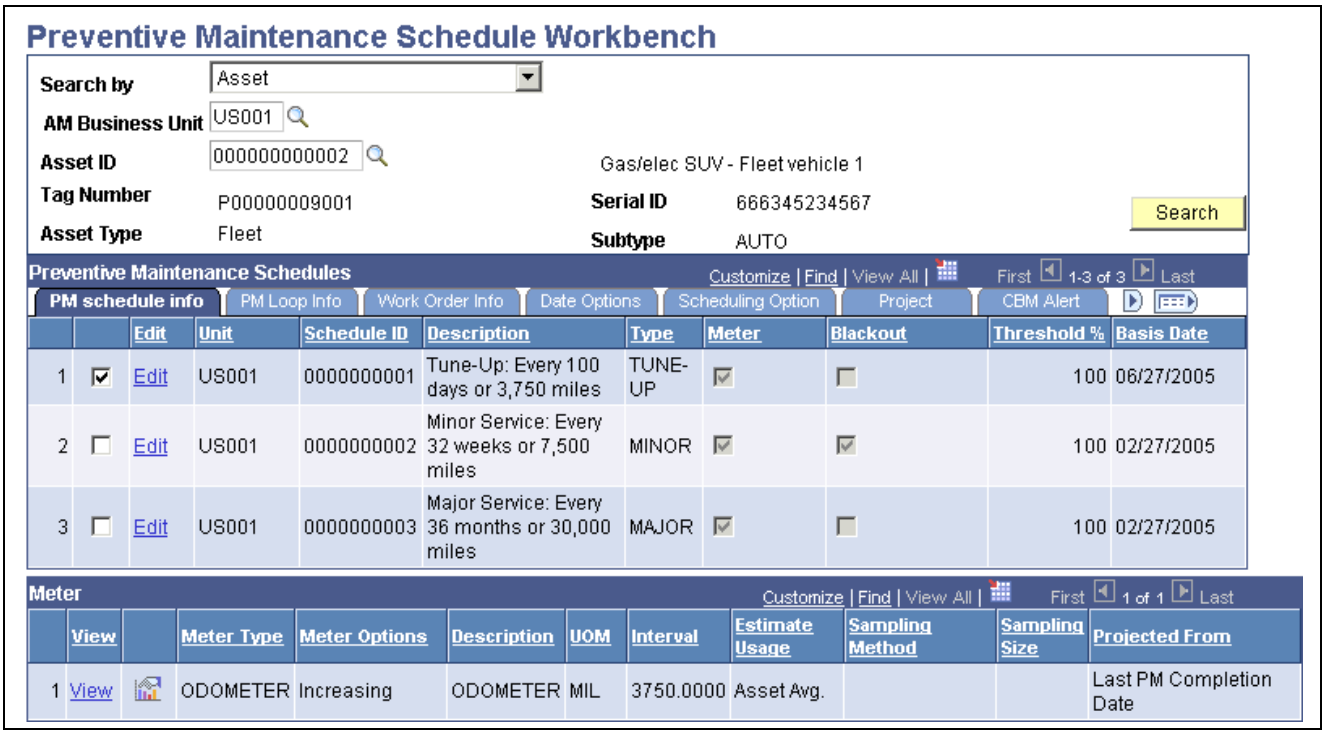
Note. You can override or delete the values from all of the asset characteristic fields except for Asset Type.

From (asset identifier) and **To (asset identifier)**

Enter a range of asset IDs, serial IDs, tag numbers, or vehicle identification numbers (VIN). The field names that appear are based on the value that you select for the Asset Field. If you select *Don't Show* for the Asset Field value, then these fields do not appear at all.

Using the Preventive Maintenance Schedule Workbench

Access the Preventive Maintenance Schedule Workbench page:



Preventive Maintenance Schedule Workbench page

Search by

Select one of the following values:

- *Asset*

  Select the asset management business unit and the asset ID, and click the Search button. This lists the PM Schedules that are associated with a specific asset.

- *Asset Location*

  Select the asset management business unit and the asset location, and click the Search button. The Asset ID field is no longer accessible. This lists the PM Schedules that are associated with a specific Asset Management business unit and asset location.

- *Work Location*

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Select the work order business unit and the location of the work, and click the Search button. The Asset ID field is no longer accessible. This lists the location schedules that are associated with a specific work order business unit and work location.

Important! This search option is used only for preventive maintenance location schedules.

PM Schedule Info

Click the Edit link to access and update the associated PM Schedule.

PM Loop Info

Click the View link to access the PM Maintenance Loop Find an Existing Value page and select a maintenance loop to review.

CBM Alert

If this asset is associated with a meter that has a range tolerance, and the meter reading for the asset exceeds the tolerance limit, then a condition-based maintenance alert is sent from PeopleSoft Asset Management to PeopleSoft Maintenance Management. PeopleSoft Asset Management automatically selects the override option in the schedule to enable the Preventive Maintenance Process to generate a condition-based maintenance work order.

Meter and Meter Readings History

This grid appears if one or more meters are associated with an asset. Click the View link to view the Meter Reading History information in PeopleSoft Asset Management.

Blackout Periods

If you set up blackout periods for a schedule, they appear as part of the PM Schedule Workbench if you select the check boxes for the schedules in the list that have the Blackout check box selected.

Running the Preventive Maintenance Process

To run the Preventive Maintenance Process, use the Run Preventive Maintenance (WM_PM_RUN_CNTL) component.

To review the results of preventive maintenance information, use the View Preventive Maintenance (WM_PM) component.

This section provides overviews of the Preventive Maintenance Process, Preventive Maintenance Process log, errors, and Preventive Maintenance Inquiry and discusses how to:

- Run the Preventive Maintenance Process.
- Review the preventive maintenance inquiry.

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Understanding the Preventive Maintenance Process

The Preventive Maintenance Process uses the date-based and meter-based preventive maintenance schedule information, the work order job templates associated with the PM Schedule, the effective date in the job template that is closest to the next calculated maintenance date, and the work order header and project information to create a work order that is based on the determination of the next maintenance due date. Preventive maintenance work orders are created for single assets, loops, and locations. Most of the preventive maintenance work order fields are copied from the work order job template that is specified in the preventive maintenance schedule's General Options page or for assets that are defined in a maintenance loop. The rules and formulas that determine the next maintenance due date based on the selections that you make in the schedule are discussed previously in the Understanding Preventive Maintenance Schedules section.

After the preventive maintenance work order is created, it is accessible through the Work Order component. You can access the preventive maintenance work order and schedule resources, if needed. Once you schedule individual technicians or technicians that belong to a crew to a work order, the preventive maintenance work order appears as a link in the technicians' workbench. If a scheduler is assigned in the work order, the work order appears in the scheduler's view of the Work Order Workbench.

Preventive maintenance work orders have the same status values as any other work orders that are created in PeopleSoft Maintenance Management.

Depending on the scheduling options that you selected in the schedule, the Preventive Maintenance Process may not always create a work order. The following is an example of this situation.

- You select the scheduling option, Generate work order if the prior is Complete. If prior work order is not Complete, update the PM Log to identify that the scheduled work order will be fulfilled by the prior work order.
- You do not change the status of the current work order to *complete,* and it is time for the next maintenance based on the due date.

As a result of your actions in the example, the Preventive Maintenance Process creates an audit record every time a work order due date comes around, but does not create a new work order. The Preventive Maintenance Process creates an audit record every time a work order due date comes around, but does not create a new work order.

The Preventive Maintenance Process creates an audit record every time a work order due date comes around, but does not create a new work order.

If you selected Always generate work orders based on the PM Schedule or Generate work order if the prior is Complete in the PM Schedule, the Preventive Maintenance Process uses the previously calculated meter reading instead of the meter reading that is based on the last work order. This applies to all Preventive Maintenance Processes. If the prior work order is not complete, the process updates the Process Log to indicate that the scheduled work order will be fulfilled by the prior work order.

Important! You cannot access a preventive maintenance work order through the Express Work Order component.

The default hierarchy for the Preventive Maintenance Process is set up so that the default values that are set up in the work order business unit are used in the preventive maintenance work order if they are not overridden at one of the subsequent levels. The work order also uses the default orders that are set up for the control default order and the project default order in the work order business unit.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," page 67.

The main default hierarchy is:

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1. Work order business unit.
2. Service group.
3. Work order type.
4. Shop.
5. Work order job template.
6. Preventive maintenance schedule.

The following table describes the source of the default values that appear in a preventive maintenance work order header and describes the default hierarchies for the values.

Preventive Maintenance Work Order Default Fields	Source	Default Value Derived From
Business Unit	Defined in the PM Schedule.	PM Schedule.
Work Order Type	Defined in the PM Schedule.	1. PM Schedule. 2. Work Order Type specified in a Shop. 3. If PM Schedule field is blank, uses Work Order Business Unit value.
PC Business Unit	Defined in the Work Order Business Unit.	Work Order Business Unit.
AM Business Unit	Defined in either the PM Schedule setup or the Maintenance Loop setup.	PM Schedule or Maintenance Loop.
Asset ID	Defined in either the PM Schedule setup or the Maintenance Loop setup.	PM Schedule or Maintenance Loop.
Service Group	Defined in the PM Schedule.	1. PM Schedule 2. If PM Schedule field is blank, uses Work Order Business Unit value.
Location	Defined in the Location Schedule.	• For Location Schedule, uses the location that is specified in the schedule. • For PM or Loop Schedule, uses Asset Location or Shop Location depending on the asset's definition in the Asset Repository.
Shop ID	Defined in the PM Schedule.	• PM Schedule. • If PM Schedule field is blank, uses the Work Order Business Unit value.
Parent Work Order ID	Defined in the Job Template.	Job Template.

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Preventive Maintenance Work Order Default Fields	Source	Default Value Derived From
Priority Code	Defined in the PM Schedule.	• PM Schedule. • If PM Schedule field is blank, uses the Work Order Business Unit value.
Approval Status	Defined in the PM Schedule.	1. PM Schedule. 2. If PM Schedule field is blank, uses the Control Default Order hierarchy, which can be either unit, work order type, and shop or unit, shop, and work order type.
Project ID	Defined in the PM Schedule.	Dependent on whether this is a work order-managed project or a Project Costing-managed project. You can specify this value in the PM Schedule's Advanced Options page for either type of project. However, you can also leave the field blank for a work-order managed project. If you leave the field blank, the default project is generated in the work order based on the Project Default Order in the work order business unit.
Task Status	Defined in the PM Schedule.	1. PM Schedule. 2. If the PM Schedule field is blank, uses the Work Order business unit value.
Asset Up Flag	Defined for the asset in PeopleSoft Asset Management.	Asset Definition in PeopleSoft Asset Management.
Scheduler Code	Defined in the shop.	Shop.
Job Template	Defined in PM Schedule.	PM Schedule.
Dependent Task and Overlap Percentage	Defined in job template.	Job template that is associated with the PM Schedule.

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Preventive Maintenance Work Order Default Fields	Source	Default Value Derived From
Chargebacks	Defined in the shop.	Shop value in PM Schedule. 1. Shop value in PM Schedule 2. If the Shop field is blank, then Work Order Type 3. If the Work Order Type field is blank, then Work Order Business Unit.
Project Costing Default Rate Set	Defined in the shop. (Rate Set is set up originally in PeopleSoft Project Costing)	Shop value in PM Schedule. 1. Shop value in PM Schedule 2. If the Shop field is blank, then Work Order Business Unit.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Work Orders, page 283.

Scheduling a Preventive Maintenance Work Order

Once the Preventive Maintenance Process applies the formulas and calculations based on your specifications in the schedule, it normally generates a work order on a given date. You can access the work order from the Work Order Workbench component or access it directly in the Work Order component to schedule the work order.

When you access the work order, you may want to override the header values that are supplied by default from the Preventive Maintenance schedule. The labor, inventory, purchase/on-hand, and tool requirements, along with instructions, a checklist, notes, and attachments are derived from the task templates that are associated with the job template that you attached to the schedule.

If you plan to schedule labor and inventory resources, you may need to consider:

- Crew scheduling.

  PeopleSoft Maintenance Management enables you to schedule individual technicians and crews on preventive maintenance work orders. To enable you to perform crew scheduling, the Schedule Crews check box on the Shop Definition page of the shop that you selected for the preventive maintenance work order must be selected. You must also set up crews and assign them to the shop. Schedulers must access the Crew Scheduling Workbench to determine the capacity of one or more crew to perform the preventive maintenance work order's tasks and schedule the crews from the Labor Assignment Workbench, along with technicians that are not part of a crew, if desired.

- Inventory parts commitment and reservation.

  To commit and reserve inventory parts for work order tasks, you must apply a combination of commit and reservation rules to the work order. These rules are set up at the work order business unit level, the shop level, and the shop/type level that is defined within the shop. The Preventive Maintenance Process calls the Reservation process when the material is ready to reserve based on the reserve rules.

The Commit Rules that are defined at the business unit, shop, and work order type level are:

- Commit at Reserve

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Selecting this Commit rule enables you to defer committing the items to PeopleSoft Inventory until the time you choose to reserve the items. The Preventive Maintenance Process will call the commit and reservation processes for transactions and point to this commit rule, as long as the associated reservation rule is either Parts List Creation or Status Change where the task status is equal to the reservation status.

Important! The Preventive Maintenance Process does not trigger the Batch Reservation process in PeopleSoft Inventory, which means that if you select a combination of the Commit at Reserve rule and the Batch Reservation rule at the business unit, shop, or shop/type level, then the Preventive Maintenance Process will create a work order without triggering the commit or reserve rules. Once the work order is created by the Preventive Maintenance Process, you can run the Batch Reservation process in PeopleSoft Inventory (Inventory, Fufill Stock Orders, Stock Requests, Reserve Materials Process) to commit and reserve the inventory that is identified in the job template that is associated with the PM Schedule.

- Parts List

  The addition of an inventory item to the parts list means that items are committed when they have been added to the Inventory Schedules grid and a save has been issued. Each subsequent part that is added and saved on the work order task will commit the item to PeopleSoft Inventory.

- Picking Plan

  You cannot create a picking plan in Preventive Maintenance, which means that the Preventive Maintenance Process does not have access to this option. You can create a picking plan only after the work order is created.

- Work Order Status Change

  Items are committed when the work order task status is changed to a status of *Awaiting Schedule, Scheduled,* or *Work in Progress*.

The Reservation Rules that are defined at the business unit, shop, and work-order type level are:

- Batch Reserve Only

  You must select Inventory, Fulfill Stock Orders, Stock Requests, Reserve Materials Process in PeopleSoft Inventory to run the Batch Reservation process, which reserves committed rows for all work orders. The Preventive Maintenance Process does not initiate the Batch Reservation process. If you select this reservation rule in combination with the Commit at Reserve rule in the business unit, shop, or shop/type, you cannot reserve the inventory that is specified in the job template of the PM Schedule until after the Preventive Maintenance Process generates the work order. Once a work order is generated, you can access PeopleSoft Inventory and run the Batch Reservation process. The Batch Reservation process does not differentiate between preventive maintenance and other types of work orders.

- Parts List Creation

  When the parts (items) in the work order task are saved, the parts (items) are reserved.

- Pick Plan Creation

  This option does not apply to the Preventive Maintenance Process because it can reserve parts only when the picking plan is run

- Work Order Status Change

  When the status of the work order task is changed to *Awaiting Schedule,Scheduled,* or *Work in Progress,* the parts (items) are reserved.

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Setting Up PeopleSoft Maintenance Management Work Order Parameters, page 108.

See Chapter 18, “Scheduling a Work Order,” page 443.

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See Chapter 19, "Performing Crew Scheduling," page 523.

Processing a Preventive Maintenance Work Order

When the Preventive Maintenance Process runs, it calculates the estimated costs for labor, inventory, purchased materials, and tools. It also calculates the required end date based on the duration that is specified in the job template, which assumes that one day has 24 work hours.

The formula for calculating the work order end date is:

WO Start Date + (Duration in Job Template ÷ 24) = Work Order End Date

You can apply work order access security to preventive maintenance work orders just as you do for other work orders. The shop in the preventive maintenance work order serves as the default shop in the Work Order Access page. You can add shops if necessary. If this is a PeopleSoft Project Costing managed work order, work order access security based on resource pools applies.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Business Unit Setup Options, page 81.

Understanding Preventive Maintenance Process Log

Use the Run Preventive Maintenance - Process Log page to track the Preventive Maintenance Process based on its process instances and review any messages that are generated by the process. You can also click the Process Monitor link to view the status of each process instance in a batch. You can view processing details for each process instance from the process monitor, as well as view the status of the servers that are running the processes.

Understanding Errors

Use the Run Preventive Maintenance - Errors page to view any error messages and their associated details that are generated by the Preventive Maintenance Process. You can also review the asset business unit, asset identification, setID, maintenance loop ID, and maintenance type that are associated with each error.

Understanding Preventive Maintenance Inquiry

After the Preventive Maintenance Process is complete, you can access the Preventive Maintenance Inquiry page to view the status of the work orders that were created, the meter reading when the work order was created, and the next maintenance percentage due based on the scheduling rules that you selected. This inquiry uses basically the same format as the Preventive Maintenance Workbench. You can click a link to access the business calendar that is associated with PeopleSoft Maintenance Management, and click a link to access the Meter Readings History for a meter that is associated with the asset being maintained. The page displays a list of all preventive maintenance schedules that were processed. You can click a link to access and edit a schedule, review the blackout periods, and review the Meter Readings Trend chart. The inquiry also displays the maintenance percentage or percent due. For example, if the maintenance percentage is 50 percent, then the preventive maintenance work is half way from being due. When the value is 100 percent, then the process creates a work order unless the maintenance due date falls in a blackout period. The page also displays the next due reading, next due date, and PM maintenance loop information and shows the work order information. It also has a link to enable you to view the current preventive maintenance work order.

Note. Readings are based only on meter-based schedules.

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Pages Used to Run the Preventive Maintenance Process

Page Name	Object Name	Navigation	Usage
Run Preventive Maintenance - Selection	WM_PM_RUN_SEL	Maintenance Management, Preventive Maintenance, Run Preventive Maintenance	Run the Preventive Maintenance Process.
Run Preventive Maintenance - Process Log	WM_PM_RUN_LOG	Maintenance Management, Preventive Maintenance, Run Preventive Maintenance, Process Log	Track the progress and any messages based on the Preventive Maintenance Processing.
Run Preventive Maintenance - Errors	WM_PM_RUN_ERROR	Maintenance Management, Preventive Maintenance, Run Preventive Maintenance, Errors	Display and review any error messages that were generated during Preventive Maintenance Processing .
Preventive Maintenance Inquiry	WM_PM	Maintenance Management, Preventive Maintenance, View Preventive Maintenance	Display the status of preventive maintenance work orders.
View Business Calendar	WM_BUS_CALENDAR	Click the Calendar link on the Preventive Maintenance Inquiry page.	Review the business calendar, including holidays, that is associated with the work order business unit for this Preventive Maintenance Inquiry.
Meter Readings History	AM_MTR_RD_HIS	Click the Meter Readings History link on the Preventive Maintenance Inquiry page.	Enter a meter and date range and review the meter reading history for the selected meter.
Meter Reading Details	AM_MTR_RD_HID	Click the Details link for a specific meter reading on the Meter Readings History page.	Review comments and the detail information regarding a selected meter reading.
Preventive Maintenance Meter	WM_PM_MTR	Click the Meter icon in the PM Info grid of the Preventive Maintenance Inquiry page.	Review the meter-based schedule information details for a meter, projected meter, and meter sample.

Running the Preventive Maintenance Process

Access the Run Preventive Maintenance - Selection page.

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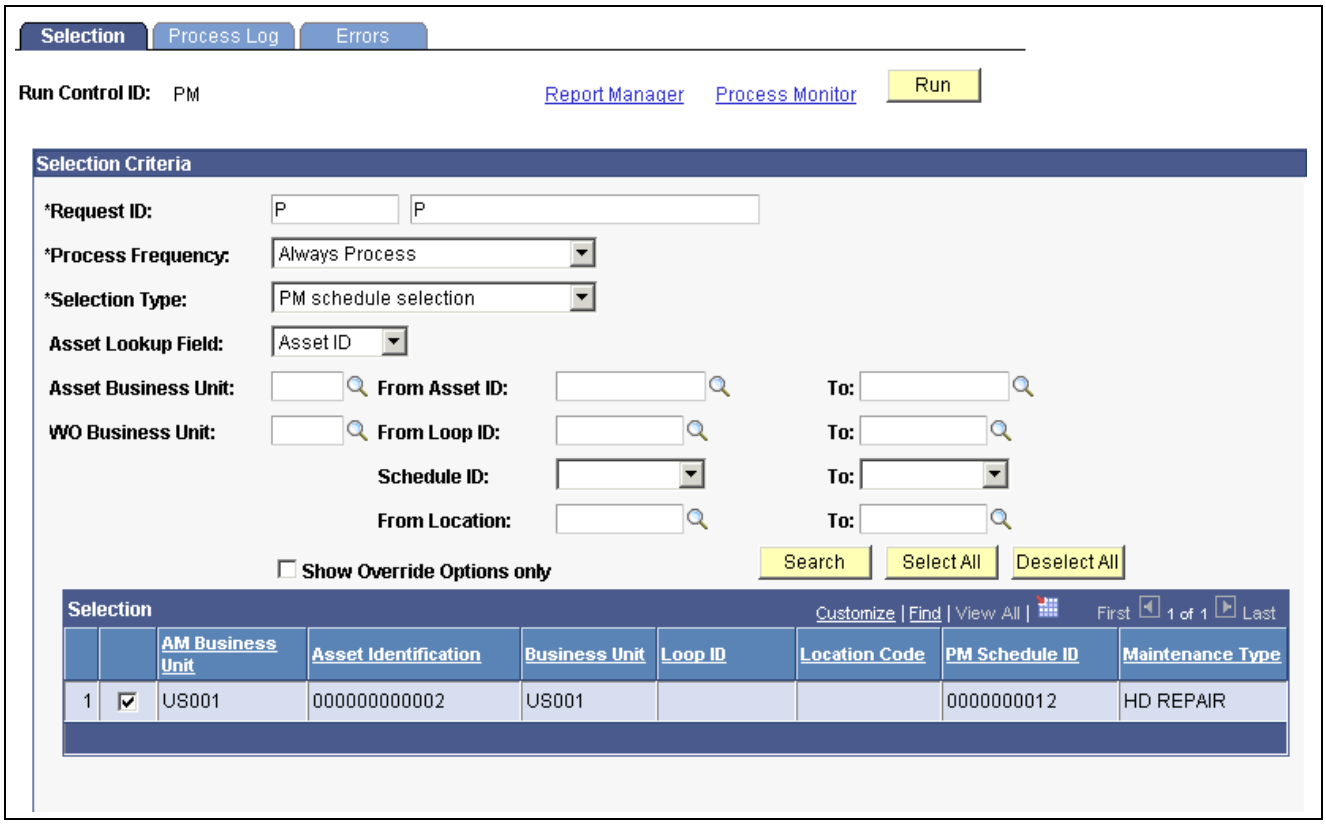

Run Preventive Maintenance - Selection page

Selection Type Select the type of data to use to run the Preventive Maintenance Process. Selecting this option displays a list of selection data types, which includes:

- *AM business unit list*
- *All business units*
- *Asset classification*
- *Location list*
- *Maintenance type list*
- *PM Schedule selection*
- *Shop List*
- *WO business unit list*

AM Business Unit List

Selecting *AM business unit list* in the Selection Type field makes all subsequent fields inaccessible to the user except for the Selection grid, where you can create a list of Asset Management business units to serve as criteria for which to run the Preventive Maintenance Process.

All Business Units

Selecting *All business units* in the Selection Type field makes all subsequent fields inaccessible to the user and does not display the Selection grid because the Preventive Maintenance Process is run for both PeopleSoft Asset Management and work order business units.

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Asset Classification

Selecting *Asset classification* in the Selection Type field makes all subsequent fields inaccessible except for the Search grid, where you create a list of asset characteristics, which include asset type, subtype, manufacturer, and model # to serve as criteria for running the Preventive Maintenance Process .

Location List

Selecting *Location list* in the Selection Type field makes all subsequent fields inaccessible except for the Search grid, where you create a list of work order business units and their associated locations to serve as criteria for running the Preventive Maintenance Process. This list consists of the locations that you can specify in the Location Schedule component.

Maintenance Type List

Selecting *Maintenance type list* in the Selection Type field makes all subsequent fields inaccessible except for the Search grid, where you create a list of maintenance types to serve as criteria for running the Preventive Maintenance Process.

PM Schedule Selection

Select *PM Schedule selection* in the Selection Type field.

Selecting this option and then selecting one of the values in the Asset Lookup field enables you to enter active fields as search criteria to search for PM Schedules.

Asset Lookup Field Select:

- *Asset ID*.
- *Don't Show* (do not show).
- *Serial ID*
- *Tag #* (tag number).
- *VIN* (vehicle identification number).

Asset ID

Select *Asset ID* for the Asset Lookup Field value.

Important! If you select one of the other lookup fields that are listed previously, such as Serial ID, the following field descriptions apply except the field names and values will pertain to the Asset Lookup Field value that you selected.

Asset Business Unit Select an Asset Management business unit to associate with one or more selected asset IDs.

Assets and **To** Select a single asset ID or select a second asset ID to create a range of assets to use as search criteria to narrow your search for PM Schedules.

WO Business Unit (work order business unit) Select the work order business unit to associate with one or more selected preventive maintenance loops.

From Loop ID and **To** Select a single loop ID or select a second loop ID to create a range of loops to use as search criteria to narrow your search for PM Loop Schedules to process.

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Schedule IDand**To**	Select a single schedule ID or select a second schedule ID to create a range of schedule IDs to use as search criteria to narrow your search for PM Schedules to process.
From Location and**To**	Select a single location or select a second location to create a range of location schedules to use as search criteria to narrow your search for Location Schedules to process.
Show Override Options Only	Select to identify the preventive maintenance schedules that have the Override Options - Generate One Time check box selected in a schedule's General Options page. Click the Search button to display a list of the preventive maintenance schedules that match this criteria.
	Note. If you select this field, the Asset Lookup, Asset Business Unit, Asset, To, Maintenance Business Unit, Loop, and To fields become inaccessible.
Search	Click to search for preventive maintenance schedules that match the search criteria. A list of preventive maintenance schedules appears in a grid based on the criteria that you selected. You can then select the schedules that you want to include in the Preventive Maintenance Process.

Don't Show

Select *Don't Show* in the Asset Lookup Field. This selection makes the Asset Business Unit, Asset, and To fields inaccessible to the user. However, you can complete the Maintenance Business Unit, Loop, and To fields as search criteria and click the Search button to list the preventive maintenance schedules based on the selected criteria. You can then select the preventive maintenance schedules that you want the Preventive Maintenance Process to use.

Note. You can also select the Show Override Options Only check box, which makes all of the other fields inaccessible.

Serial ID

Select *Serial ID* in the Asset Lookup Field. All of the subsequent fields and buttons appear and work the same way as your selection of the asset ID, except that you can enter one serial ID or a number or a range of serial IDs instead of one or more asset IDs.

Tag # (tag number)

Select *Tag #* in the Asset Lookup Field. All of the subsequent fields and buttons appear and work the same way as your selection of the asset ID, except that you can enter one tag number or a range of tag numbers instead of one or more asset IDs.

VIN (vehicle identification number)

Select *VIN* in the Asset Lookup Field. All of the subsequent fields and buttons appear and work the same way as your selection of the asset ID, except that you can enter one VIN or a range of VINs instead of one or more asset IDs.

Reviewing the Preventive Maintenance Inquiry

Access the Preventive Maintenance Inquiry page.

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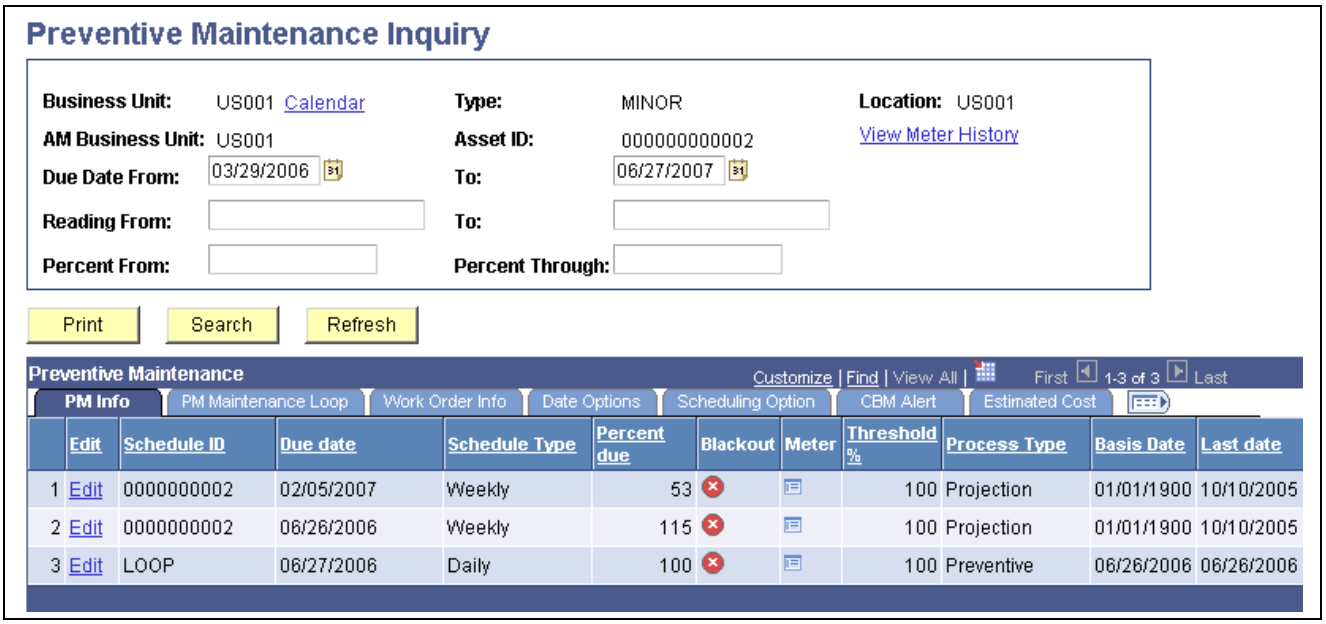

Preventive Maintenance Inquiry page

Search Criteria

You can search for all work orders that were created by the Preventive Maintenance Process by leaving the Business Unit, AM Business Unit, Asset Identification, Maintenance Type, Location Code, and Loop ID fields blank and clicking the Search button on the Preventive Maintenance search page.

Calendar Click to review the business calendar.

View Meter History Click to view the Meter Reading History for the meter that is associated with this asset.

Due Date From and **To** Enter a range of preventive maintenance due dates to display the associated preventive maintenance work orders that were generated by the Preventive Maintenance Process.

Reading From and **To** Enter a range of meter reading values to display a list of work orders that were generated for the selected asset based on meter readings.

Percent From and **Percent Through** Enter a range of percentage due values to display a list of work orders with percentage due values that fall within this range for the selected asset.

PM Info

After specifying the search criteria, click Search to display work orders in the grid. Select the PM Info tab.

Edit Click to access and edit the schedule that is associated with the row.

Schedule Type Identifies the calculation method that was used to trigger the creation of the work order.

The listed schedule type can be:

- Day interval.
- Week interval.
- Month interval.

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- Specific date.
- Meter reading.
- CBM alert.
- Sampling days.
- Sampling reading.
- Cycles.
- Average from asset.

Percent Due Displays the maintenance percentage due amount based on the calculation of the maintenance due date. This calculation is performed by the Preventive Maintenance Process to generate a work order. The formula for calculating this percentage is Percent Due = 100 × Current Reading − Previous Work Order Reading ÷ Meter Interval

This field may have a value:

- Of zero if you created a work order from a projection.
- Greater than 100 percent if the Preventive Maintenance is overdue.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Schedules, page 290.

Blackout Click to display the blackout periods that are associated with the selected schedule.

Meter Click to access the Preventive Maintenance Meter page. You can click an icon on this page to access and view the Meter Readings Trend Chart, which charts the meter reading date and time against the meter reading over a period of time. You can also view project meter readings based on a specific projection method and view the meter sample, if used.

PM Maintenance Loop

Select the PM Maintenance Loop tab to display the setID that is associated with a maintenance loop ID if this is a preventive maintenance Loop Schedule.

Work Order Info

Select the Work Order Info tab to display the work order business unit, the work order number, and the current work order status. You can also click a View link to view the actual work order. You cannot modify the work order using this link.

Date Options

Select the Date Options tab to view the date option (if applicable) that was selected for each of the listed schedules.

Scheduling Options

Select the Scheduling Options tab to view the scheduling option (if applicable) that was selected for each of the listed schedules.

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CBM Alert

Select the CBM Alert (condition-based maintenance alert) tab to view the CBM alert, the source of the CBM alert, the alert ID, and the CBM alert date and time. This appears only for preventive maintenance schedules that are associated with condition-based maintenance work orders and indicates whether the CBM was used (*On*) or not used *(Off.*)

Estimated Costs

This tab lists the estimated labor, tools, inventory, and procurement costs. These estimated costs are calculated first in the Preventive Maintenance Process. They can be recalculated later based on changes made to the work order.

Reviewing the Preventive Maintenance Meter Information

Access the Preventive Maintenance Meter page.

This page includes these three grids.

Meter

This grid describes the meters that are used by the PM Schedule. This information includes:

- View.

  Click to access the Meter Readings History page for this meter. The Meter Readings History page lists each meter reading date, whether the meter was rolled over or replaced, the meter reading on that date, the accumulated meter reading, he variation between the meter reading on that date and the accumulated meter reading, and the unit of measure that is used for the meter reading, such as miles. You can click a Details link to access the Meter Reading Details page, which lists the current reading, the increment or decrement amount, the cumulative reading, and the actual daily average reading, and indicates whether the reading was replaced, allows for rollover, or is out of sequence. You can also review comments about this meter and meter reading.

- Meter Reading Trend Chart.

  Click to access a Meter Reading Trend Chart for this meter, which enables you to compare meter readings that were taken on different dates and times with one another in graphic form.

- Meter Type.

  Identifies the type of meter, which is identified in the PM Schedule.

- Meter Options.

  Indicates whether this is an increasing or decreasing meter.

- Percent Due.

  Displays the maintenance percentage due amount based on the calculation of the maintenance due date. This calculation is performed by the Preventive Maintenance Process to generate a work order. The formula for calculating this percentage is Percent Due = 100 × Current Reading − Previous Work Order Reading ÷ Meter Interval

- Due Date.

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Indicates the calculated next maintenance due date, which the system uses to generate a work order.

- Interval.

  Displays the measurement between readings, which is used to determine the next meter reading.

- UOM. (unit of measure)

  Indicates the unit of measure that applies to the interval measurement.

- Last reading.

  Indicates either the reading that is entered against the last work order when the selected scheduling option is "Generate WO (work order) when prior is complete," or the last PM transaction calculated reading when the selected scheduling option is "Always Generate WO based on PM Schedule."

- Current reading.

  Indicates the latest reading that is entered for the asset before the Preventive Maintenance Process is run.

- Reading.

  Indicates the reading that is calculated in the Preventive Maintenance Process based on PM Schedule rules and methods.

Projected Meter

If this meter is used to perform projected meter readings, this grid describes the methods that were used to create the projections. The columns on this grid include:

- Project Usage.

  Indicates how the projections will be calculated (Average from Asset or Sampling)

- Sampling Method.

  Indicates whether the sampling will be based on cycles, days, or readings.

- Sampling Size.

  Indicates the size of the sampling based on the sampling method.

- Projected From.

  Indicates whether the sampling will be projected from the current system date or the last PM completion date.

- Estimated Daily Average

  Indicates the calculated average meter reading measured per day based on whether you use one of the sampling methods or the average from asset method.

  See Chapter 12, “Setting Up and Generating Preventive Maintenance Work Orders,” Understanding Projected Meter Readings, page 298.

- Projected days.

  Indicates the number of days until the next maintenance due date.

- Projection Basis Date.

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Indicates the date on which the projection was based, which is either the current system date or the last PM completion date.

Meter Sample

Describes the details of the sample taken if the sampling method was used for a projection. The columns are:

- Sampling Method

  Indicates whether the sampling method was cycles, days, or readings.

- Sampling Size

  Indicates the number of cycles, days, or readings that were used in the sample.

- First Date and First Reading

  Indicates the date and value of the first reading that was taken for the sample.

- Last Date and Last Reading

  Indicates the date and value of the last reading that was taken for the sample.

Generating and Analyzing Preventive Maintenance Projections

To generate preventive maintenance projections, use the Run Project (WM_PM_PJC_RUN) component.

To review projections use:

- The View Projection Summary (WM_PM_PJC) component.
- The View Projection Detail (WM_PROJECTION) component.

To integrate preventive maintenance projections with Microsoft Project, use the Microsoft Project Integration (WM_MSP) component.

This section provides an overview of Preventive Maintenance projections and discusses how to:

- Set up processing options for preventive maintenance projections.
- Review a summary of preventive maintenance projections.
- Review details of preventive maintenance projections.
- Export preventive maintenance projections and work orders to Microsoft Project.
- Import work order data from Microsoft Project to Maintenance Management.

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Understanding Preventive Maintenance Projections

Preventive maintenance projections enable you to plan future maintenance, as well as determine future labor and material demand. The Preventive Maintenance Projection process uses the maintenance rules and intervals that you set up for a single asset, asset loop, or location in the preventive maintenance schedule to determine when to create the projected maintenance work. Once these projections are generated into a staging area, you can view the results using the View Projection Detail and the View Project Summary components in PeopleSoft Maintenance Management or by loading the projection data into Microsoft Project. You can create work orders based on selected projections directly from the Projection Summary inquiry. The difference between the Preventive Maintenance Process and the Preventive Maintenance Projection process is that the Preventive Maintenance Process generates the first maintenance due date, while the Preventive Maintenance Projection process generates multiple projections with future dates based on a specified period of time or on the number of occurrences that are entered. The Preventive Maintenance Projection process generates a projection with the most recent projected start date. For example, if the date-based rule is every 15 days, and the start date for the meter-based rule is projected for 30 days ahead, the process creates the projection based on the date-based rule, because the projected start date is more recent than the one that was calculated for the meter-based rules.

Note. The Preventive Maintenance Projection process generates the same projection for all of the assets that are defined in the loop.

Projections are processed based on the data that is entered in the preventive maintenance schedule. The calculation methods that the Preventive Maintenance Projection process uses to generate preventive maintenance projections are the same methods that are used by the Preventive Maintenance Process that is described in the Understanding Preventive Maintenance Scheduling section. They are:

- Date-based schedules

  The Preventive Maintenance Projection process calculates these projections based on the date and period rules that are set up in the preventive maintenance schedule. The process determines the next projected date by adding the date interval to the last generated projection date. Blackout periods that are set up in the schedule are taken into account for projections. For example, if a blackout period is set up from July 1, 2005 to September 1, 2005 and the projected date falls within the blackout period, the process does not generate that projection. The Preventive Maintenance Projection process uses the start date that is defined in a schedule's General Options page, rather than the last preventive maintenance work-order date for the first cycle.

  Important! Projections are not generated for schedules using specific dates. In addition, the threshold that is indicated in the PM Schedule is not used for projections.

- Meter-based rules

  The meter-based rules are:

  - Basic or fixed meter rules.

    Important! Projections are not calculated for these rules.

  - Average from asset meter-based rules, which are used to determine the average meter reading from the PeopleSoft Asset Management Meter Reading table and then use the same calculation as the Sampling Days and the Sampling Readings rules to determine the next maintenance due date.
  - Sampling days meter-based rules, which are used to calculate the average meter reading based on the PeopleSoft Asset Management Meter Reading History table using a sample size of a specified number days. This average meter reading is then used to calculate the number of days until the next maintenance is due.

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- Sampling readings meter-based rules, which are used to calculate the average meter reading based on the PeopleSoft Asset Management Meter Reading History table using a sample size of a specified number of meter readings. This average meter reading is then used to calculate the number of days until the next maintenance is due.

  See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Schedules, page 290.

  Note. If no readings are available, the system uses the estimated average reading from the PeopleSoft Asset Management setup. If the estimated average is not found, the system issues an error message. If only one reading is on the PeopleSoft Asset Management Meter Reading History within the period that is determined in the sample size field, the Preventive Maintenance Projection process issues an error message indicating that no reading history is available from which to perform projections. If the user specifies a sample size that is greater than the number of readings available, the Preventive Maintenance Projection process proceeds to generate the projections and issues a warning message in the error table.

- Cycle meter-based rules.

  These rules are based on the calculation of the percentage of the maintenance that is due. The system then calculates the number of actual days that were required to get to the percentage of the maintenance due. Finally, the system calculates the number of days that will be required to reach 100 percent maintenance due.

  If the Preventive Maintenance Projection process is calculating the first projection date for the preventive maintenance schedule, the projected date will be thirty days forward from the last work order completion date. For the projections following this first one, the next projected date will be the thirty days forward from the previous projected date.

  Note. You can perform projections if no readings are available from the last maintenance completed for first cycles. The Preventive Maintenance Projection process uses zero as the value for the meter reading of last maintenance completed for the meter type, which is set up in PeopleSoft Asset Management. Also, if no last maintenance completed date is available for first cycles, the Preventive Maintenance Projection process uses the start date that is defined in the PM Schedule, which may be the same date as the asset acquisition date, in service date, or any other user-defined date.

  If you selected Always generate work orders based on the PM Schedule or Generate work order if the prior is Complete in the PM Schedule, the Preventive Maintenance Process uses the previously calculated meter reading instead of the meter reading based on the last work order. This applies to all preventive maintenance and projection processes. If the prior work order is not complete, the process updates the Process Log to indicate that the scheduled work order will be fulfilled by the prior work order.

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Important! Calculations for Averages from Asset, Sampling Days, and Sampling Readings projections are based on the selection in the PM Schedule of the *Current System Date,* which is the date that the Preventive Maintenance Process was last run, or the *Last PM Complete Date,* which is the date that the last preventive maintenance work order was closed. The Cycle rules use only the current system date.

If the projection is based on the last date that a preventive maintenance work order was closed (last PM completion date) and no date is available because this is the first cycle, then the process uses the basis date that is defined in the preventive maintenance schedule's General Options page.

If the projection is based on the last date that the Preventive Maintenance Process was run (current system date) and this is the first cycle, the process uses zero as the minimum reading.

If the Preventive Maintenance Projection process calculates a past date for the next projected date, the system replaces this date with the current date.

Also, the Preventive Maintenance Projection process does not factor the work order duration into the calculation of the next projected start date.

The Preventive Maintenance Projections process selects the preventive maintenance schedules to process based on criteria that you define in the Run Projection – Selection page. This page is exactly the same as the page described in Running the Preventive Maintenance Process section, with one exception: the Show Override Options only field does not appear on the page because it is not applicable for projections.

The system processes projection data based on a user's selections in the pages of the Run Projection component. The Preventive Maintenance Projections Process continues to calculate the maintenance projected date until it reaches the finish date or until it fulfills the number of occurrences that are specified in the Run Projection – Processing Options page. Following that, the system creates any exceptions and error messages.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding the Preventive Maintenance Process, page 317.

Projection and Effective Dates

The Preventive Maintenance Projection process uses the effective date in the work order job template that is closest to the projected due date of the first projection that was generated. For example, if the process is run on September 8, 2004 and two effective dates are set up for the job template (August 8, 2004 and January 1, 2004), the system uses the effective date August 8, 2004 because it is the closest date to all of the generated projections.

Using the Preventive Maintenance Projection Summary Inquiry

The Preventive Maintenance Projection process generates the projections and stores them in a Projections table. Two methods are available for viewing and analyzing these projections:

- The PeopleSoft Maintenance Management Preventive Maintenance Projection Summary and Detail Inquiries.
- Microsoft Project.

You can review and analyze the projections using the View Projection Summary and View Projection Detail components.

If you are satisfied with one or more of the projections, you can select projections from the summary grid and create work orders. If you are not satisfied with the results of the projections, you can run them again after modifying the rules in your schedule.

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You can narrow your search for preventive maintenance work order projections in the Projection Summary page by entering a work order business unit, shop, and crew for preventive maintenance work orders using crew assignments. You can also specify a date range for the projections. Once your search criteria is specified and you click the Search button, the Preventive Maintenance View Projection Summary component contains:

- A Projection General list of each projection that is generated by the Preventive Maintenance Projection process, which includes the Asset Management business unit, asset ID, asset description, location, maintenance type, and due date.
- A PM Schedule Info list of each preventive maintenance schedule ID that is associated with each projection and its associated work order business unit. If the associated schedule is a loop schedule, the list also includes the setID that is associated with the loop and the loop ID.
- A PM Loop Info list, which identifies the setID that is associated with each Maintenance Loop ID.
- A Projection Detail list, which is a list of all of the projection IDs and their associated work order business units, as well as a link to enable users to view each projection's details.
- An Asset Info list, which identifies the Asset Management business unit, the asset ID and description, the asset's location, and the asset type and subtype classifications.
- An Additional Asset Info tab includes the maintenance due date, the manufacturer ID, and the model.

Using the Preventive Maintenance Projection Detail Inquiry

The Preventive Maintenance View Projection Detail component enables you to review the details of projected work orders and includes:

- A Projection page, which describes the projection's work order header information, including:
  - A Duration group box, which contains the required start and end dates and the duration of the work order.
  - An Estimated Cost group box, which contains the total estimated costs that are calculated based on the requirements that are defined in the work order job template that is associated with the schedule and the cost values in the shop.
  - A Shop group box, which contains the shop ID from either a default value in the schedule or a value that is entered in the work order and the scheduler's ID, which is a default value from the work order.
  - An Approval group box, which indicates the approval characteristics of the work order.
- A Task page, which consists of:
  - A General grid listing all of the work order tasks, which were defined in the work order job template that is associated with the schedule, the work order task duration, any task dependencies, the percentage of overlap with other dependent tasks, and whether the cost of each task must be charged back to another organization.
  - An Estimated Cost grid containing any estimated inventory, material, labor, and tool costs for each task.
  - An Asset Info grid, which defines the AM business unit, asset ID, location, and if the asset if the asset is functioning (up) or offline for repair for each task.
- A Labor Requirement page, which contains a Requirements grid for each task and lists the labor requirements and the estimated costs of these requirements.

Note. Estimated costs are calculated for a work order only if you specify that you want to calculate them in the work order business unit.

- A Tool Requirement page, which contains a list of all the tools that are required for a task and the estimated tools usage costs.

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- A Material Requirement page, which contains a list of all of the inventory requirements for a task and the estimated costs for these materials.
- A Procurement Requirement page, which contains a list of all of the noninventory and open description items that you must procure for the task, along with their estimated costs.

Using Preventive Maintenance Projections with Microsoft Project

If you want to analyze the projections using Microsoft Project, you can access the Microsoft Project Integration component and set up the search criteria to export data for either projection, work order, or both into Microsoft Project. If you export projections, you must enter the process instance ID for the particular projection run in the search criteria. After you enter the search criteria, you can save them and reuse them. Click the Search button, and a list of projections, work orders, or both appears. You can select the projection and work order data that you want to export to Microsoft Project, assign a name to the export file, and let the software insert key data for projection, work order, or both into the WM_MSP_AET_DAT using the WM_MSP_AE process for access by Microsoft Project.

Note. You cannot import projection data from Microsoft Project to PeopleSoft Maintenance Management. However, you can import other work order data such as some work order header and task data.

Pages Used to Generate and Analyze Preventive Maintenance Projections

Page Name	Object Name	Navigation	Usage
Run Projection - Selection	WM_PM_RUN_SEL	Maintenance Management, Preventive Maintenance, Run Projection, Selection	Enter selection criteria to run the Preventive Maintenance Projections process. This page is exactly the same as the Run Preventive Maintenance – Selection page.
Run Projection - Processing Options	WM_PM_RUN_OPT	Maintenance Management, Preventive Maintenance, Run Projection, Processing Options	Define the processing options for preventive maintenance projections, which include creating a work order, the projection start and end dates, and selection of the projection method.
Run Projection - Process Log	WM_PM_RUN_LOG	Maintenance Management, Preventive Maintenance, Run Projection, Process Log	Track Preventive Maintenance Projection processing and messages. This page works the same way as the Run Preventive Maintenance - Process Log page.

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Page Name	Object Name	Navigation	Usage
Run Projection - Errors	WM_PM_RUN_ERROR	Maintenance Management, Preventive Maintenance, Run Projection, Errors	Display errors, PM Schedule information, and message details that are generated by running the Preventive Maintenance Projection process. This page works the same as the Run Preventive Maintenance - Errors page.
Projection Summary	WM_PM_PJC	Maintenance Management, Preventive Maintenance, View Projection Summary	Review a list of each of the preventive maintenance projections and their associated preventive maintenance schedules, and provides a link to the detail information for each projection.
Projection	WM_PM_PJC_HDR	Maintenance Management, Preventive Maintenance, View Projection Detail, Projection	Review projection header information, including duration, estimated costs, shop, and approval statuses.
Task	WM_PM_PJC_TSK	Maintenance Management, Preventive Maintenance, View Projection Detail, Task	Review a list of projected work order tasks, the estimated costs for the tasks, and the asset information that is associated with the tasks.
Labor Requirement	WM_PM_PJC_LBR	Maintenance Management, Preventive Maintenance, View Projection Detail, Labor Requirement	Review the labor requirements and estimated costs that are associated with each task for this projection.
Tool Requirement	WM_PM_PJC_TLS	Maintenance Management, Preventive Maintenance, View Projection Detail, Tool Requirement	Review the tool requirements and estimated costs that are associated with each task for this projection.
Material Requirement	WM_PM_PJC_MAT	Maintenance Management, Preventive Maintenance, View Projection Detail, Material Requirement	Review the material requirements and estimated costs that are associated with each task for this projection.
Procurement Requirement	WM_PM_PJC_PO	Maintenance Management, Preventive Maintenance, View Projection Detail, Procurement Requirement	Review the procurement requirements and estimated costs that are associated with each task for this projection.
Search and Export Work Orders/PM Projections	WM_MSP	Maintenance Management, Work Order Management, Microsoft Project Integration	Integrate preventive maintenance projections and work orders into Microsoft Project for analysis.

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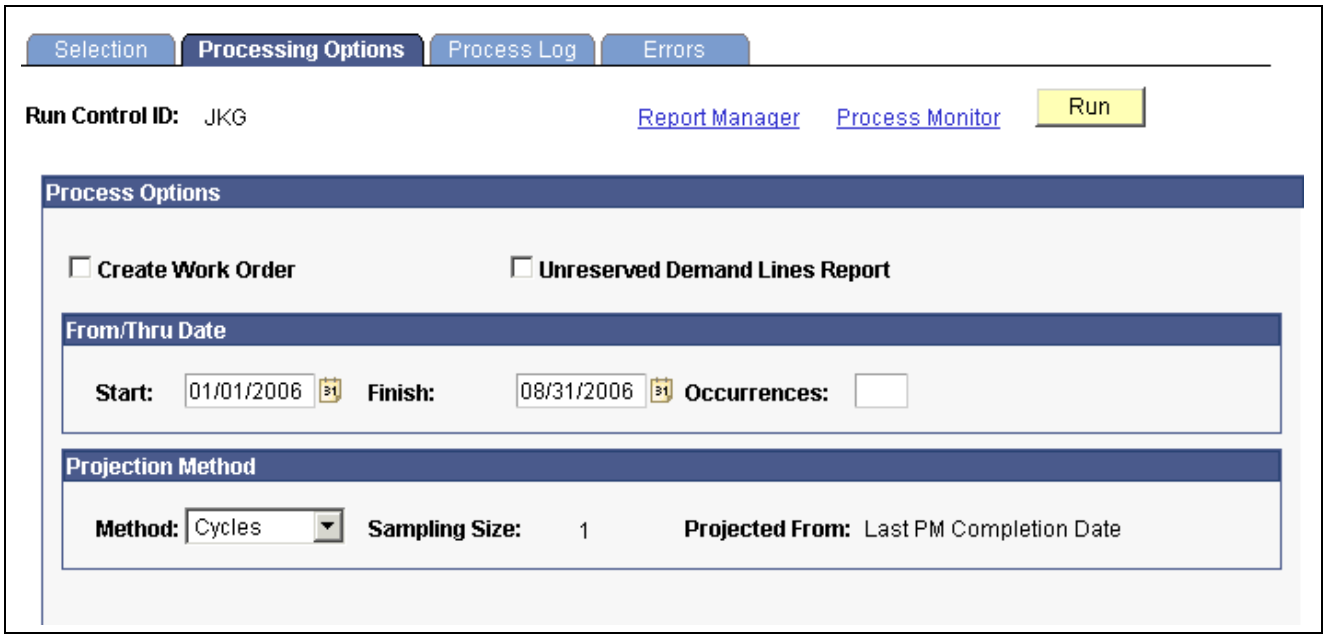
Page Name	Object Name	Navigation	Usage
Import Microsoft Project File	WM_MSP_IMPORT	Maintenancre Management, Work Order Management, Import From Microsoft Project	Import projection and work order data from Microsoft Project to Maintenance Management.

Setting Up Preventive Maintenance Projection Processing Options

Access the Run Projection - Processing Options page.



Run Projection - Processing Options page

The Run Projection - Selection page is identical to the Run Preventive Maintenance - Selection page except for the Show Override Options only check box on the Run Preventive Maintenance - Selection page.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Running the Preventive Maintenance Process, page 316.

Create Work Order Select to create work orders that are identical to the previously generated and analyzed projections.

Note. Typically, most users want to run the Preventive Maintenance Projection process first without selecting this check box. After analyzing the projections that are generated, they can select this check box and create work orders based on the same run control and criteria that were used to generate the projections.

Unreserved Demand Lines Report Select this check box to enable a report showing the reservation exceptions to run. If you do not select this check box, the report will not run.

Start Enter the date for the Preventive Maintenance Projection process from which to start generating the projections. If this field is populated, the Occurrences field is left blank.

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Finish

Enter the date for the Preventive Maintenance Projection process from which to finish scheduling preventive maintenance. If this field is completed, the Occurrences field is left blank.

Note. The generated projections fall between these start and finish dates.

Occurrences

Enter a number between 1 and 999. If you do not enter start and finish dates, then you enter the number of maintenance due dates that you want to include in the projections. The maximum number of projection occurrences is 999. If you complete this field, the Start and Finish fields are left blank.

Method

Select one of the following values:

- *Cycles*
- *Days*
- *Readings*

Note. If you select a schedule on the Selection page, which uses Sampling as the Estimate Meter Usage method, then you can select one of these method values to override the one or more methods that you specified in the PM Schedule. The Preventive Maintenance Projection process uses the method that is selected here. You can also leave this field blank if you want to use the method that is selected for Sampling in the PM Schedule.

Sampling Size

If you selected *Cycles,* a *1* appears in this field. *Cycles* does not use a sampling size. For *Days* and *Readings,* enter the number of days that you want to include in the sampling size or the number of readings that you want to include in the sampling size.

Projected From

Select one of the following values:

- *Last PM Completion Date*
- *Current System Date*

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Schedules, page 290.

Reviewing a Summary of Preventive Maintenance Projections

Access the Projection Summary page.

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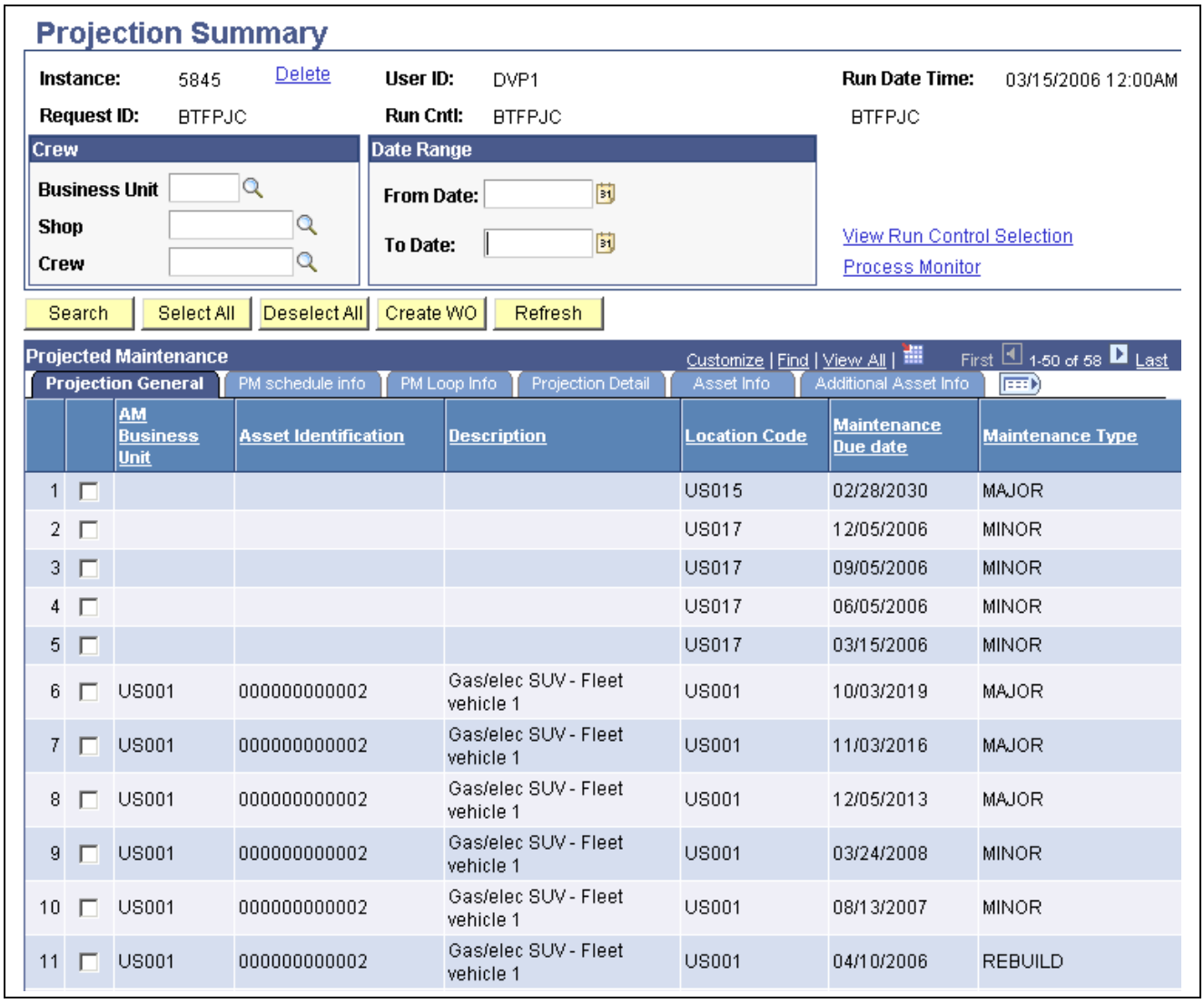

		AM Business Unit	Asset Identification	Description	Location Code	Maintenance Due date	Maintenance Type
1	☐				US015	02/28/2030	MAJOR
2	☐				US017	12/05/2006	MINOR
3	☐				US017	09/05/2006	MINOR
4	☐				US017	06/05/2006	MINOR
5	☐				US017	03/15/2006	MINOR
6	☐	US001	000000000002	Gas/elec SUV - Fleet vehicle 1	US001	10/03/2019	MAJOR
7	☐	US001	000000000002	Gas/elec SUV - Fleet vehicle 1	US001	11/03/2016	MAJOR
8	☐	US001	000000000002	Gas/elec SUV - Fleet vehicle 1	US001	12/05/2013	MAJOR
9	☐	US001	000000000002	Gas/elec SUV - Fleet vehicle 1	US001	03/24/2008	MINOR
10	☐	US001	000000000002	Gas/elec SUV - Fleet vehicle 1	US001	08/13/2007	MINOR
11	☐	US001	000000000002	Gas/elec SUV - Fleet vehicle 1	US001	04/10/2006	REBUILD

View Projection Summary - Projection Summary page

Business Unit,Shop, and**Crew** — Select the work order business unit, shop, and crew to narrow your search to work order projections to which a crew will be assigned.

From Date and **To Date** — Enter the date range for the projections that you want listed.

Search — Click the search button to list the projections based on your search criteria. You can enter both crew and date range criteria, if you want.

View Run Control Selection — Click to view the details of the run control options that were used when this process instance was generated using the Run Projection process.

Process Monitor — Click to view the Process List and Process Servers that are associated with the selected process instance.

Create WO (create work order) — Select the projections in the list for which you want the system to create work orders, and click the Create WO button. The new preventive maintenance work orders appear in the Work Order Search Results. When you click the Refresh button, the projections that are selected to create the work orders are removed from the grid.

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Projection General

Displays the AM business unit, asset identification, description, location code, maintenance due date, and maintenance type for each projection.

PM Schedule Info

Select the PM Schedule Info tab to view the information in the Projection General grid along with the work order business unit and the PM schedule ID for each projection.

PM Loop Info

Select the PM Loop Info tab to view the information in the Projection General grid along with the setID that is associated with the Maintenance Loop and the maintenance loop ID for each projection. (This information appears only for projections that used the PM Loop Schedule.)

Projection Detail

Select the Projection Detail tab to view the information in the Projection General grid along with the projection ID and a View link to the View Projection Detail inquiry for the specific projection ID.

Asset Info

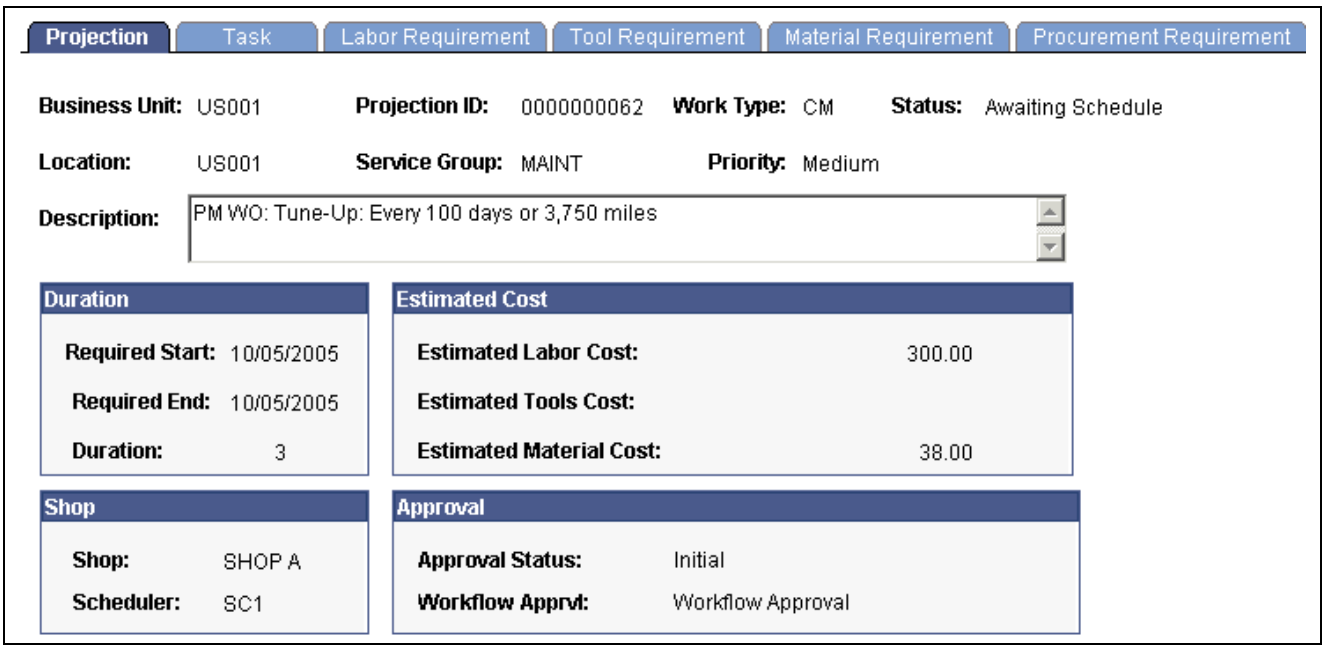
Select the Asset Info tab to view the information in the Projection General grid along with the asset type and subtype for each projection.

Additional Asset Info

Select the Additional Asset Info tab to view the information in the Projection General grid along with manufacturer ID and model for each projection.

Reviewing Details of Preventive Maintenance Projections

Access the View Projection Detail - Projection page.



View Projection Detail - Projection page

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Projection

The Projection page presents a summary of the projection and the information that will appear in the work order's header.

Task

Select the Task tab to view a list of projected work order tasks based on the job template that is associated with the PM Schedule that is used for the projection.

- Select the General tab in the Project Tasks grid to review the task number, the duration, any task dependency, the overlap percentage, a crew ID if a crew was scheduled, and whether to calculate chargeback costs to another organization.
- Select the Estimated Cost tab to review the projected estimated tools, material, and labor costs for each task in the projection.
- Select the Asset Info tab to review the Asset Management business unit, asset ID, asset location, area ID, and whether the asset is functioning or offline for repair.

Labor Requirement

Select the Labor Requirement tab to review the labor requirements for each separate task, including a description of the task.

- Select the General tab in the Requirements grid to review each line (row) within the task, which includes the craft, the quantity of labor needed, and the unit of measure that is used to calculate the estimated cost of labor.
- Select the Estimated Cost tab in the Requirements grid to review each line's labor cost rate and bill rate (default value derived from the shop that is identified in the PM Schedule) and the calculated estimated labor cost and estimated billing amount for each line.

Note. Click the arrow in the right-hand corner of the Project Tasks group box to review the lines for the next task (if the projection included more than one task.)

Tool Requirement

Select the Tool Requirement tab to review the tool requirements for each separate task, including a description of the task.

- Select the General tab in the Requirements grid to review each line (row) within the task, the asset type, subtype, manufacturer, and model characteristics of the tool along with the amount of tool usage.
- Select the Estimated Cost tab in the Requirements grid to review each line's quantity of tools needed and the unit of measure, along with the tool cost rate and bill rate (default value from the asset type and subtype or from the shop that is identified in the PM Schedule) and the estimated tool usage cost and estimated tool usage billing amount, which are calculated for each line.

Note. Click the arrow in the right-hand corner of the Project Tasks group box to review the lines for the next task (if the projection included more than one task.)

Material Requirement

Select the Material Requirement tab to review the inventory requirements for each separate task, including a description of the task.

- Select the General tab in the Requirements grid to review each line (row) within the task that includes the Inventory business unit, the item, the quantity required, and the unit of measure.

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- Select the Estimated Cost tab in the Requirements grid to review each item's unit cost rate (default value specified in the item ID and derived from the work order task template that is associated with the job template in the PM Schedule) and the calculated estimated cost for each line.

Note. Click the arrow in the right-hand corner of the Project Tasks group box to review the lines for the next task (if the projection included more than one task.)

Procurement Requirement

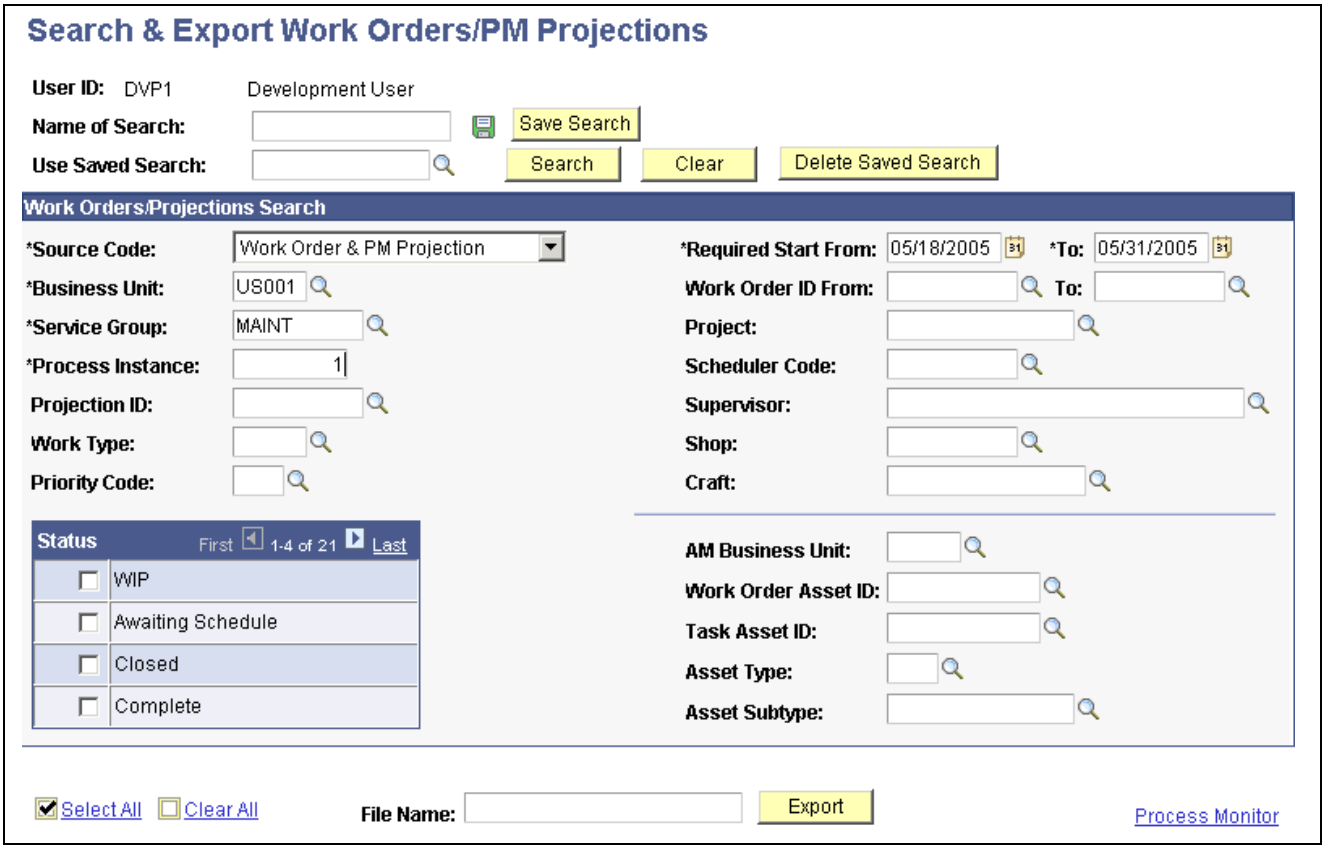
Select the Procurement Requirement tab to review the labor, noninventory material, and tool requirements that must be procured for each separate task, including a description of the task.

- Select the General tab in the Requirements grid to review each line (row) within the task that includes the resource type (labor, material, tools), the Inventory business unit, the item number, the quantity required, and the unit of measure.
- Select the Estimated Cost tab in the Requirements grid to review the estimated cost, which is based on calculating the estimated unit cost based on the resource type times the quantity required.

Note. Click the arrow in the right-hand corner of the Project Tasks group box to review the lines for the next task (if the projection included more than one task.)

Exporting Preventive Maintenance Projections and Work Orders with Microsoft Project

Access the Search & Export Work Orders/PM Projections page.



Search & Export Work Orders/PM Projections page.

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Name of Search Enter a name to identify a search to use to filter data for the work order, preventive maintenance projects, or both. You can enter the search criteria in the Work Order Projections Search group box before you enter a name to identify the search for future use, if you want.

Save Search Click to save the identified search after you enter the search criteria to enable you to reuse the search criteria again without having to reconfigure the search criteria.

Use Saved Search Select a previously saved search name and click the Search button to display the search results based on the criteria that are specified in the Work Order Projections Search group box.

Work Orders/Projections Search

Enter the search criteria to list the projections, work orders, or both that you want to export to Microsoft Project.

Source Code Select one of these values:

- *PM Projection* (preventive maintenance projection)
- *Work Order*
- *Work Order and PM Projection*

Business Unit Enter a work order business unit. This is a required field.

Required Start From, To Enter a Required Start From and To dates. This is a required field.

Service Group Select a service group that is associated with the work order or projections. This is a required field.

Process Instance Enter the specific process instance for the projections, which has a default value of *1*. If this search is just for work orders, then the process instance default value of *1* is read-only.

Status Select the status of the work order, projection, or both if you want. Statuses are user-defined values, which are based on required system-defined values.

Work Order/PM Projections List

When you click the Search button after entering the Search criteria, a list of work orders, projections, or work orders and projections appears. You can select the items from the list that you want to export into Microsoft Project.

File Name Enter a name for the file containing the selected projection, work order, or projection and work order data that you want to export into Microsoft Project.

Export Click to insert the designated list of work orders and projections into the key fields of the WM_MSP_AEP_DATA table. An application engine process, WM_MSP_AE, exports the data into Microsoft Project.

Process Monitor Click to monitor the WM_MSP_AE process.

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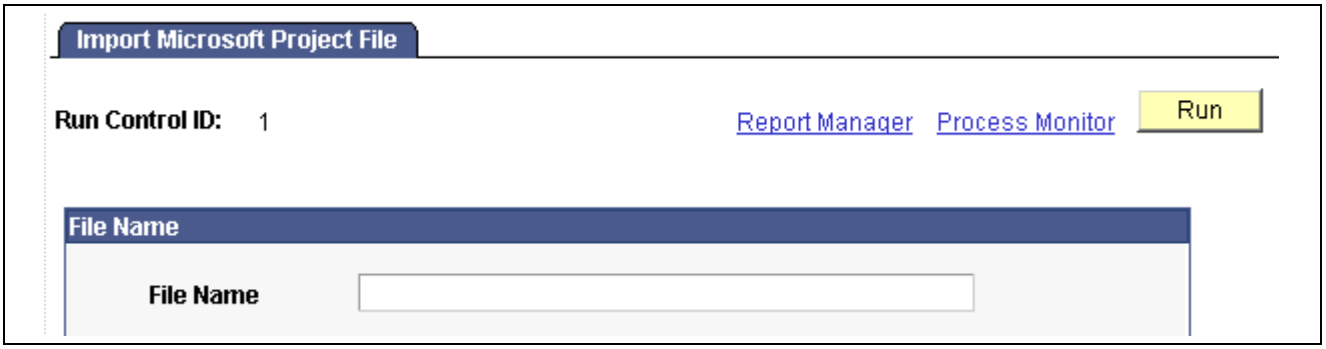
Importing Work Order Data to Maintenance Management From Microsoft Project

Access the Import Microsoft Project File page.



Import Microsoft Project File

File Name Enter the name of the Microsoft Project File that you want to import into Maintenance Management. You can only import selected work order data that you exported. You cannot import projections that you exported.

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CHAPTER 13

Creating a Service Request

This chapter presents an overview of Oracle's PeopleSoft Enterprise Maintenance Management service request creation and use and discusses how to create and manage a service request.

Understanding Service Request Creation and Use

Service requests enable employees and non-employees, who may not have access to a help desk provider or PeopleSoft Maintenance Management, to enter a request by means of a self-service web page to repair, move, or maintain one or more of an organization's assets. When a user enters a service request to report a problem, an agent receives the service request. The agent solves the problem, assigns a technician to solve the problem, or creates a work order in PeopleSoft Maintenance Management, which is used to assign labor, material, and tools resources to solve the problem.

This section discusses:

- Service request product integrations.
- Service request setup.
- Service request process flow.
- Service request resolutions.

Service Request Product Integrations

Service requests integrate with:

- PeopleSoft Asset Management.

  When users create a service request, they normally identify the asset needing repair in the asset repository.

- PeopleSoft Human Capital Management (PeopleSoft HCM).

  If a service request user is an employee and the employee's organization has PeopleSoft HCM, then the system can synchronize the employee data with the PeopleSoft HCM data.

- Third-party application.

  If the user is an employee, the organization can integrate the employee data from a third-party application.

- PeopleSoft Maintenance Management.

  Once the service request is created, an agent is assigned to manage the service request in PeopleSoft Maintenance Management. The agent can create a PeopleSoft Maintenance Management work order from the service request. In addition, the agent can associate a calendar with an employee (agent or technician) assigned to manage a service request by generating the employee as a resource using the Create Resource functionality in PeopleSoft Maintenance Management.

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Note. You can manually enter employees into the Financials database. However, non-employees can also create a service request without being set up in the database. To create a service request, only a user ID is required.

Service Request Setup

To create and process a service request, organizations must set up:

- Permission lists, user profiles, and roles.

  See *Enterprise PeopleTools PeopleBook: Security Administration*

- Service request business units.

  See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Service Request Business Units, page 71.

- A service request business unit for specific users in the Define User Preferences, Maintenance Management page.

  See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

- SMTP (Single Mail Transfer Protocol) settings.

  See *Enterprise PeopleTools PeopleBook: System and Server Administration, Setting Application Server Domain Parameters*

- Set up service request statuses.

  See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

- Problem, Cause, and Resolution (PCR) data (optional).

  This includes problem, cause, and resolution definitions and problem groups.

- A problem tree, which is the source for much of the default data in a service request.

- Employees in PeopleSoft Maintenance Management or PeopleSoft HRMS and generate them as resources in PeopleSoft Maintenance Management.

See Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," Understanding Problem Tree Setup for Use in Service Requests, page 134.

Service Request Process Flow

The following diagram represents the service request process flow.

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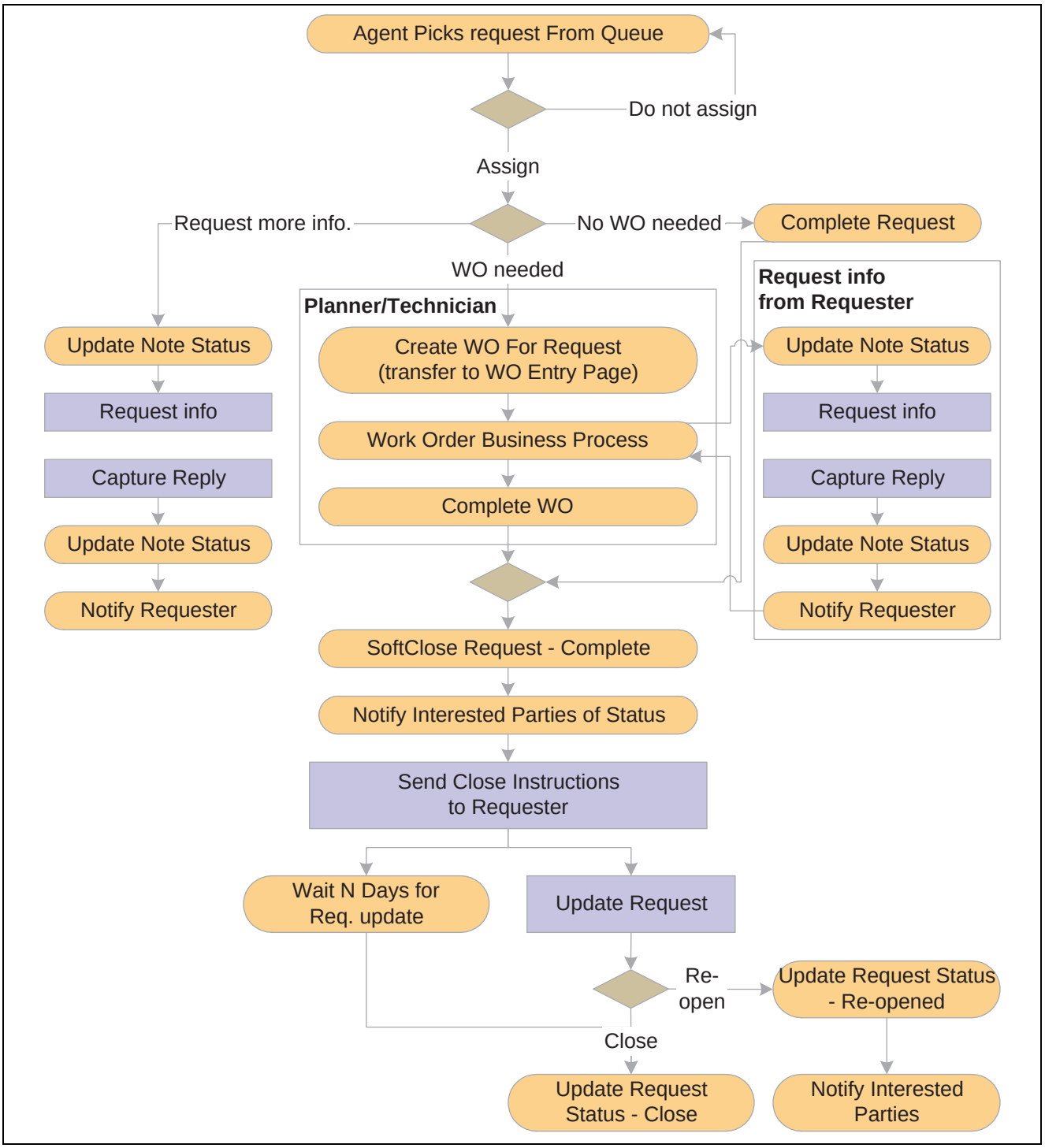

Service Request Process Flow

Service requests are created in three different ways:

- A requester creates a self-service service request using the Employee Self-Service, Service Request, Service Request Wizard component, which guides the requester step-by-step through the service request information.

Note. The requester can be an employee, a non-employee, or a representative, such as a manager.

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- A requester creates a self-service service request using the Employee Self-Service, Service Request, Service Request component, which enables a requester to complete the service request using a one-page format.
- An agent creates a service request using the Maintenance Management, Service Request Management, Agent Service Request component, which enables the agent to not only create a service request, but also create a work order from the service request.

Note. Only the Agent Service Request component is documented in this chapter. The Agent Service Request contains the same features as the self-service components, along with additional features, such as the Create Work Order button.

Service Request Problem Definition Using a Problem Tree

The fields that display in the Request Detail group box are based on the levels defined in a problem tree in PeopleSoft Maintenance Management and optionally on any additional fields your organization defines as supplemental data. The first node level of the problem tree represents the Request Type field, which lists the various categories of problems, such as Computers, Fleet-Vehicles, and Facilities, depending on how your organization sets up the tree. The next field, which represents the second level of the problem tree that displays on the page is dependent on your specific Request Type selection. For example, if you select *Computers* as the Request Type in the service request, then the next field name that displays is Computers. You then select from a list of different types of computer problems, which represent the next level in the problem tree, such as *Hardware* and *Software*. The field name or names that display next on the page are dependent upon the field value you select. For example, if you select the field value *Hardware*, then field name Hardware displays next on the page. You then select from a list of Hardware problems, which are defined in the next level of the problem tree, such as *Mouse doesn't work*, *CD ROM doesn't read*, *Printer does not work* and more.

Your selection of this field value determines what other field names appear on the page. The problem tree fields control the asset identifier that displays in the service request. If the service request is used for a facilities move, the problem tree controls whether special Facilities Move Request fields appear in the service request. If you add fields using supplemental data, the supplemental data fields are dependent on the last node value selected in the problem tree. For example, if you created a supplemental data field, Operating System, that is associated with the selection of*CD ROM*, then when you select *CD ROM* in the service request, the Operating System field displays.

Supplemental Data in a Service Request

You can also define supplemental data fields that display in the service request and further specify the problem. When either a requester or agent creates a new service request and selects values that display based on the problem tree setup, additional fields may appear, based on the setup of supplemental data, that prompt the user for more information about the problem. For example, if you select the value, *Mouse doesn't work*, which is derived from a level in the problem tree, and you set up two additional supplemental data fields such as, Operating System and Type, these fields appear in the service request. You can then select values for each of these fields to better describe the problem. A set of supplemental data accompanies PeopleSoft Maintenance Management, which you can use or modify depending on the needs of your organization.

See Chapter 24, "Using Supplemental Data," Understanding Supplemental Data, page 653.

Facilities Move Request

You can also create a special type of service request called a facilities move requests. A facilities move is a request to move an employee's office or one or more pieces of office equipment to another office. If you create a problem tree for a facilities move request and define the WM_MOVE_SBR in the Subrecord field, these system-defined fields appear in the request:

- Move From Location.
- Move To Location.

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- Charge To Department.
- Move Employee.
- Move Phone.
- Move Equipment and Furniture.

If a work order is created, these fields are copied to the work order description field or work order notes to enable a technician to see the details of the move on the printed work order.

Submitting a Service Request or Facilities Move Request

For service requests, requesters have the option of selecting the specific asset requiring service, as well as the asset's location. They can specify search criteria to locate an asset in PeopleSoft Asset Management asset repository.

In addition, requesters can further define the problem and add any number of attachments such as documents, diagrams, and screen shots, which can help describe the problem.

When the requester selects the Finish button in the Service Request Wizard component or selects the Submit button in the Service Request single-page component, the service request is saved and the requester is transferred to the My Service Requests component where the new service request appears at the top of the list. From the My Service Requests page, a requester can view, add notes and attachments, and close or reopen a completed request.

If a technician or agent requests more information from the requester, an alert indicator appears on the request line of the My Service Requests page, which instructs the user to E-mail a reply. Submitting a service request also sends it to the Service Request Inbox in PeopleSoft Maintenance Management, which is shared by one or more agents.

Either a user or an automatic process may trigger state transitions for a service request. Users trigger state transitions by selecting buttons or changing a field status. Automatic processes include the completion or cancellation of a work order.

Service Request Assignment and Processing

Once a requester creates a service request, any employee who is set up in an agent's role may access it through the Service Request Inbox.

An agent can:

- Change the contact information, re-categorize the request type, change the asset information, and add notes and attachments to the service request.
- Solve the problem and change the status of the service request to complete.
- Request more information from the requester about the problem.
- Assign the service request to a technician if more work is required without creating a work order.
- Create a work order in PeopleSoft Maintenance Management if more work is required.
- Cancel an existing work order.

The following table describes the types of individuals typically involved in the service request process and the activities each one performs.

Important! There are specific roles and permission lists already created for PeopleSoft Maintenance Management in the sample data included in your software. You should base your setup on this data and not the roles and permissions described in this table.

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Individual Responsible	Activity
Requester	Creates a service request using the self-service service request options.
Agent	Create and manage service requests and create work order.
Service Request Technician	Create and manage service requests and create work order
Planner/Scheduler	Plans workload and schedules technicians for work orders.
Work Order Technician	Performs work identified on work order.

The agent's user ID is the default value in the Assigned To field on the service request. The agent can assign a service request to a technician or another agent. However, you must set up this agent in the agent role and the technician role before an agent can assign the service request. In addition, you must define the technician's role in the problem tree, which determines the resources that are listed on the drop-down list for the Assigned To field in the service request. If the agent changes a service request's category, then the list of technicians can also change.

After an agent creates a work order, a planner assigns it to a work order technician. The work order technician may or may not be the same individual as the service request technician. From the Technician Workbench component, the work order technician can drill down to the work order and then drill down further to access the Service Request. The technician for the work order can also access any assigned service requests by selecting a link directly in the Technician Workbench component, which displays a list of the technician's assigned service requests. The technician for the work order can request more information from the requester by sending the requester an email directly from the work order Notes page. *Pending* displays in the Notes field in the requester's My Service Request page for the service request submitted by the requester. When the requester responds to the note, then *Replied* displays in the Notes field of the Service Request Inbox, as well as in the Technician Workbench.

Service Request Resolutions

Agents and technicians resolve service requests by:

- Completing a service request, which automatically generates an email notifying the requester that a simple service request was resolved.

  When the agent or technician changes the status to complete and saves the service request, the system sends an email to the requester indicating the completion of the service request and its closing in a specified number of days. If not satisfied with the results, the requester may reopen the service request. The email to the requester contains a link to the Service Request Update page.

- Canceling a service request, which automatically generates an email notifying the original requester of the cancellation.

  The requester has no recourse for the cancellation of a service request other than opening a new service request or asking the agent to open a new service request.

- Creating a work order for a service request that cannot be easily resolved.

  This generates a new work order number and copies it back to the service request. The agent can make changes to the work order or make changes to the service request to update the work order. In the latter case, the work order is updated with changes made to the service request based on the following rules:

  - If the work order status is identified as the Initial Status in the Work Order Status Setup page, if you change contact information, request type, problem summary and detail, and asset information in the service request, the system updates this information on the work order.

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- If the work order status is anything other than Initial, only a change in the contact information on the service request is updated in the work order.

  Note. Contact information includes only the contact method and alternate email address or phone. Agents and technicians cannot change the Requested For field once a work order is created. They cannot change the Requested By field in the service request once service request is submitted.

- Canceling a work order.

  An agent or technician may cancel a work order created from a service request if the work order status is set to Initial. However, if the work order status is set to a status other than Initial and the work order's status allows a transition to Canceled, then when the service request agent or technician selects the Cancel Work Order button in the Service Request, the system sends an email to the assigned planner or technician requesting the cancellation of the work order. The planner or technician can decide to cancel or not cancel the work order. The system notifies the agent if the work order was canceled, which automatically cancels the service request. A notification is also sent to the requester that the service request was canceled.

- Completing a work order.

  The system notifies the requester that the work order is complete and that the service request will be closed automatically based on the number of days specified in the service request business unit. The system notifies the requester that if the work is unsatisfactory, the requester may click on the URL in the email and access the Update Service Request page and reopen the service request.

All PeopleSoft Maintenance Management users, excluding the original service request requester, can view the audit history of a service request.

Creating and Managing a Service Request

To create a service request use:

- The Service Request Wizard (WM_ADD_WR_WIZARD) component.
- The Service Request (WM_ADD_WR_SS) component.
- The Agent Service Request (WM_WORK_REQUEST) component.

To review and manage service requests, use the:

- Service Request Inbox (WM_REQUEST_INBOX) component.
- My Service Requests (WM_MY_REQUESTS) component.

This section discusses how to:

- Create a service request as an agent in PeopleSoft Maintenance Management.
- Use the service request inbox.

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Pages Used to Create a Service Request

Page Name	Object Name	Navigation	Usage
Service Request	WM_WORK_REQUEST	Maintenance Management, Service Request Management, Agent Service Request	Update an existing service request or create a new service request within the Maintenance Management system.
Create Work Order	WM_CREATE_WO_SEC	Click the Create Work Order button on the Service Request page.	Select a shop and modify the priority of the work order. Create a work order and update the service request with the work order's ID.
Monthly Schedule	RS_SCHED_MONTH	Click the Monthly Calendar icon on the Service Request page.	Review assignments.
Task Details Appointment Details	RS_SCHED_APPT	Click the day of the month link on the Monthly Schedule page.	Enter task appointment details and occurrences for a specific time related to a task category.
Daily Schedule	RS_SCHED_DAILY	Click the Return to Daily Schedule in the Monthly Schedule page.	Review hourly assignments for a specific time and day and click hour link to access the Appointment Details page.
Appointment Details	RS_SCHED_APPT	Click an hourly link in the Daily Schedule page.	Enter specific details for the appointment.
Service Request Inbox	WM_REQUEST_INBOX	Maintenance Management, Service Request Management, Service Request Inbox.	Locate and access service requests assigned to agents and technicians.
Audit History	WM_WR_AUDIT	Maintenance Management, Service Request Management, Agent Service Request, click the Audit History tab.	Track the modifications to a service request.
Create Service Request	WM_WORK_REQUEST_SS	Employee Self-Service, Service Request, Service Request	Create a one-page, self-service service request in the Maintenance Management system.
My Service Requests	WM_MY_REQUESTS	Employee Self-Service, Service Request, My Service Requests	Review and modify self-service service requests.
Service Request - Requested By	WM_WR_BY_WIZ	Employee Self-Service, Service Request, Service Request Wizard	Create a service request step-by-step in the Maintenance Management system.

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Page Name	Object Name	Navigation	Usage
Service Request - Requested For	WM_WR_FOR_WIZ	Employee Self-Service, Service Request, Service Request Wizard, click Next to display the Service Request-Requested For page.	Identifies the employee contact information for this employee, if the user indicated that this request was for someone else on the Requested By page, otherwise it uses the requested by employee name.
Service Request - Request Type	WM_WR_TYPE_WIZ	Click Next on the Service Request Required By page.	Access the next level in the problem tree to define the problem based on the levels and fields that were set up in the problem tree .
Service Request - Request Detail	WM_WR_SUPLDATA_WIZ	Click Next on the Service Request Type page.	Review the type of supplemental data that is attached to a specific problem . Data is informational only. If this is a Facilities Move service request, the supplemental data is predefined in the system.
Service Request - Fulfillment Detail	WM_WR_DETAIL_WIZ	Click Next to display the Service Request - Fulfillment Detail page.	Identify the service center and the specific asset information, and add attachments.
Service Request-Summary	WM_WR_SUMMARY_WIZ	Employee Self-Service, Service Request, Service Request Wizard, click Next to display the Service Request - Summary	Summarizes the previously entered service request information.

Creating a Service Request as an Agent in PeopleSoft Maintenance Management

Access the Service Request page.

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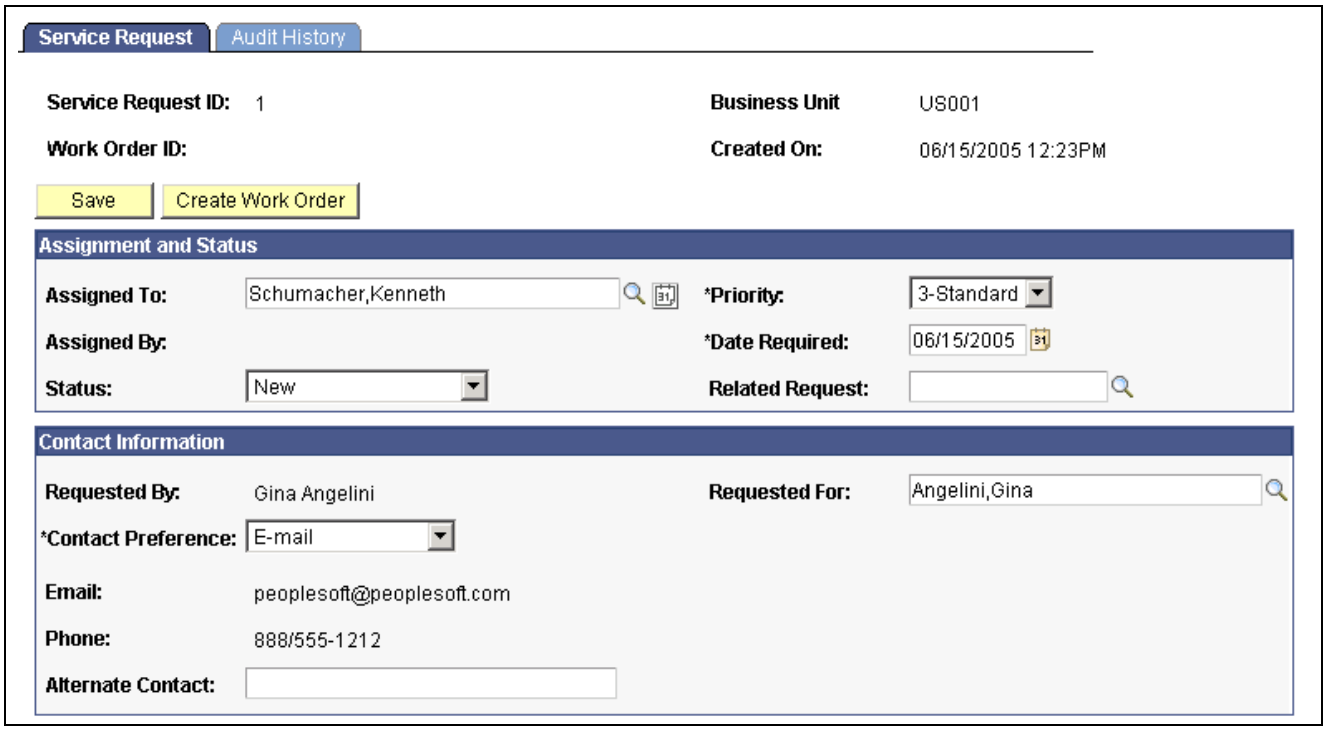

Service Request page (1 of 2)

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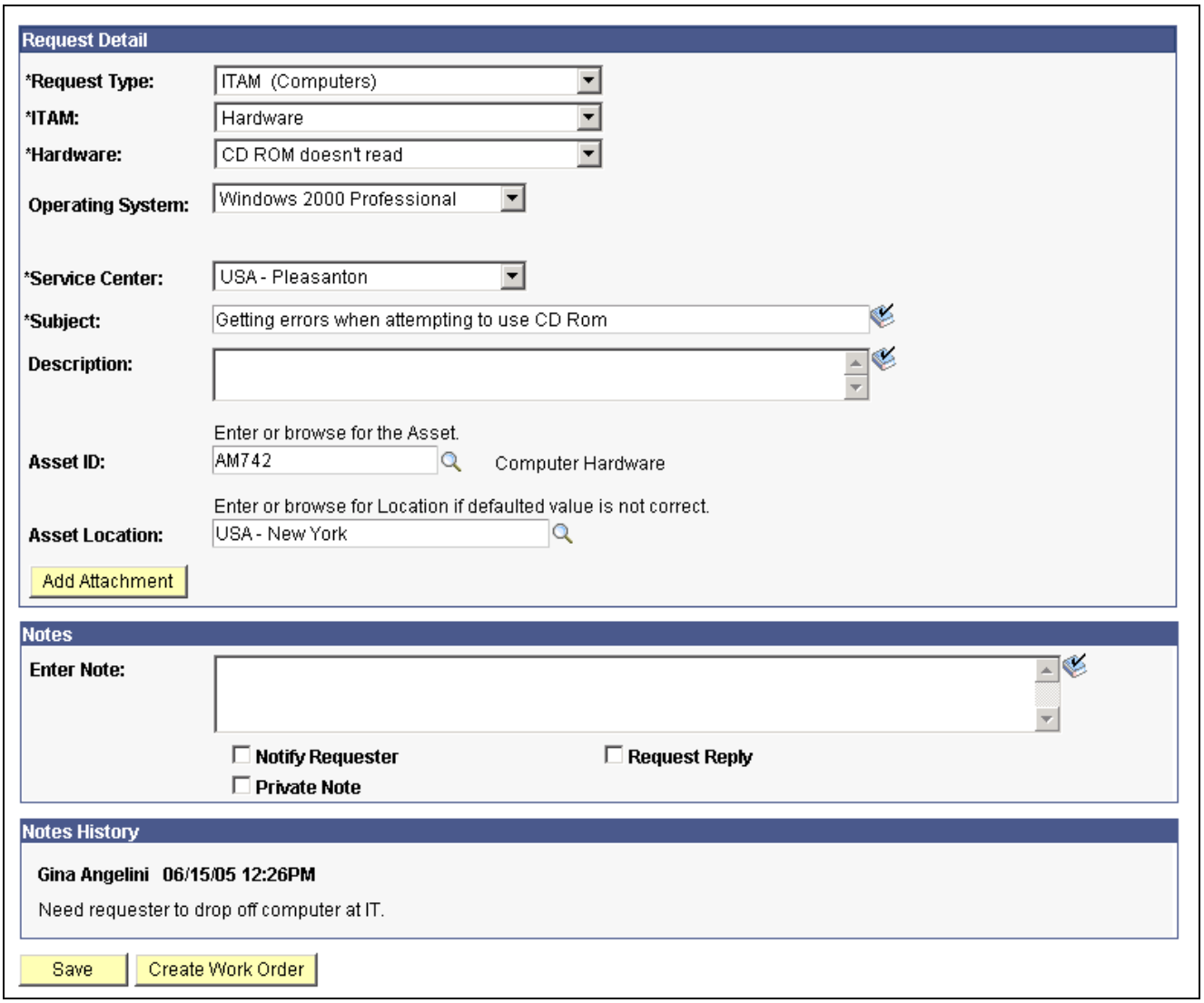

Service Request page (2 of 2)

Assignment and Status

Assigned To Select from a list of all of the technicians associated with the technician role on the service request. An agent must belong to the technician role to appear in the list.

Note. If an agent or technician is not set up as a resource in PeopleSoft Maintenance Management, the agent's monthly calendar is not available.

Monthly Calendar Click this icon to access the agent or technician's Monthly Schedule page. Schedules are discussed in detail in the "Setting Up Labor and Tools Resources" chapter.

See Chapter 8, "Setting Up Labor and Tools Resources," Managing a Resource's Monthly Schedule, page 233.

Priority Select the priority of this service request from the drop-down list as being *Critical, Urgent, Standard,* or *Low.*

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Note. The service request priorities are predefined in the PeopleSoft Maintenance Management system. Work order priorities are user-defined.

Assigned By Displays the name of the agent who picks up the service request. If the Assigned To field value is changed, the system updates this field with the name of the current user.

Date Required Displays the date when a service request is created either by the agent or the requester. The agent or requester can change this date.

Note. If an agent creates a work order based on this service request, this date is copied to the Required Start and End date fields in the work order.

Status Select the current status of this service request.

Note. This field is only available to the agent.

Related Request Select the service request that is related to this service request. For example, a service request may have been closed and the requester notified the agent that the problem was not corrected. The agent creates this new service request and uses this field to select the previous service request to serve as additional information. This field is also useful when a user submits a service request when a server is down and an agent creates a work order. Other users report the same problem and the agent sets the related requests to the original request with the work order.

Contact Information

Requested By Displays the agent's name if the agent is creating a new service request. If an agent is updating an existing self-service service request, this is a read-only field that contains the name of the requester who created the self-service service request.

Requested For Select the name of the original requester if you are creating this service request for someone else. For example, if this service request was closed before it was actually completed, the agent creates a new service request and identifies the requester of the old service request in this field. If an agent is updating a service request, this field displays the name of the person selected by the requester on the self-service service request. If the agent does not select a name, the Requested By name is the defaulting field value.

Note. If the Contact Preference is set to *E-mail*, the system sends an E-mail to this person indicating that the service request has been completed.

Contact Preference Select the preferred way to contact the requested by and requested for parties. Once an agent or technician completes the service request, the users specified in the requested by and requested for fields receive an email informing them of this fact.

Email Displays email address of the requester based on the user profile setup.

Phone Displays an employee's phone number. If the requester is a non-employee, a phone number is not displayed in this field.

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Alternate Contact Enter another method of contacting the requested by and requested for employees, such as a mobile phone number or an alternate email address.

Request Detail

Request Type Select the category that best describes this service request problem. If this is a facilities move service request, predefined supplemental data fields appear.

Note. This row can display more than once depending on the number of levels in the Problem Tree page. The remaining fields on this page depend upon the problem tree's setup method for this request type, as well as any supplemental data setup.

Service Center Select the service center field to route the service request to the location where the agent works. Normally the user (requester) selects a service center, which is the location where the agent works. If agents select a service center, this routes the service request to their own inbox or to the inbox of another agent. The drop-down list consists of locations that are valid for the problem that is identified in the problem tree. The default field value comes from user preferences or the service request business unit definition provided it is a valid value in the problem tree. The list of valid values is defined in the Service Center Information group box on the Problem Tree page.

Note. This is not necessarily where the problem is fixed. For example, the agent may send the service request to reinstall a hard drive in a computer to a service center (fulfillment location). However, the service center may send the computer back to the factory.

Subject and **Description** Enter a short description of the problem in the Subject field, such as "Mouse not working." Add additional details about the problem, which might include any system messages you received or what you were doing when a piece of equipment failed in the Description field.

Asset ID Click the Search button to display the Asset Search page, where you can enter search criteria to locate a specific asset in the asset repository.

Asset Location Override the default location associated with the asset, if necessary. You can also leave this field blank. If you create a work order this field's value is copied as the asset's location in the work order.

Attachments

Add Attachment Click the Add Attachment button to enable you to browse and upload any files essential to this service request, such as a screen shot of an error message, an authorization from a manager to move, or the readings from a piece of equipment.

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Notes

Enter any notes or special instructions that apply to this service request. The system keeps a history of any events that transpire between the agent and the requester, and it also keeps a record of any communication between the technician and the requester. The contact for a work order originating from the service request is the requester. If the requester, who is identified in the Requested By field, entered the service request on behalf of another person, who is identified in the Requested For field, the requester is the one who receives requests for more information and responds to those requests. The only time that the individual on whose behalf the request was entered is notified is when the service request is complete.

Notify Requester Select this check box to automatically notify the requester.

Request Reply Select this check box to request that the receiver of this note (requester) reply to the contents of the note. The Notes field on the Employee Self-service, Service Request, My Service Request page indicates to the requester that the note is pending. When the requester opens the service request, the note appears in the Notes History group box. The requester can click on the Reply button and enter a reply to the original note.

Note. When the requester responds to this note, the Notes link in the work order and the link in the technician's workbench indicate that a reply is awaiting review.

Private Note Select this check box to prevent requesters from seeing this note.

Notes History

A record of each note displays in this group box, which includes the note's content, author, date, and time. The system keeps a running history when you save the page.

Create a Work Order

An agent can optionally select this button to create a work order from a service request, if the service request cannot be solved by the agent or technician without requiring a work order.

Important! You cannot create a work order until you create and save the service request.

Create Work Order Click this button to access the Create Work Order secondary page, where you must identify the shop to associate with this work order and modify the priority of the work order, if necessary. When you select OK, the work order is created and the Work Order ID field on the service request is updated and serves as a link to the work order.

Note. This work order is not automatically submitted for approval. It is available to the planner to review and submit it for approval, if necessary.

Using the Service Request Inbox

Access the Service Request Inbox page.

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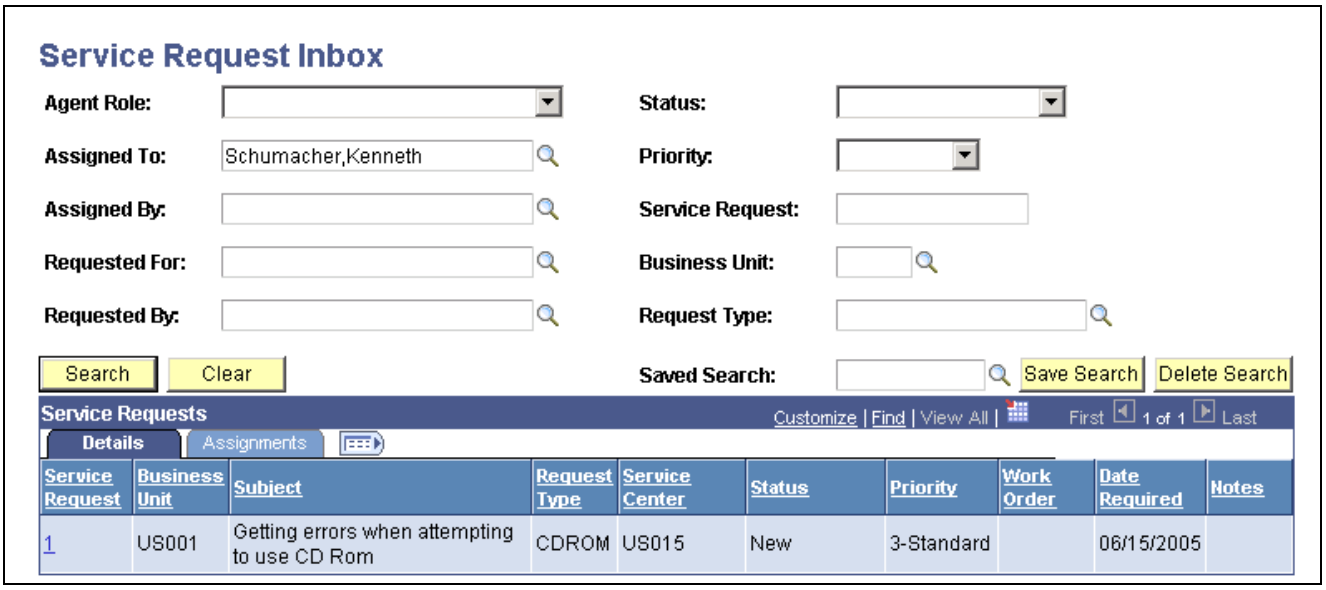

Service Request Inbox page

Save Search Click this button to save your search criteria or click the Search button if you do not want to save your search criteria after selecting values to narrow your search for any of these fields:

- Agent Role
- Status
- Assigned To
- Priority
- Assigned By
- Service Request
- Requested For
- Business Unit
- Requested By
- Request Type

Saved Search Select one of your saved search criteria and then select the Search button to list the service requests bases on the selected search criteria.

Service Requests – Details and Assignments

After you perform a search, a list of service requests displays in this grid, which enables you to access the actual service request, as well as review its details. It also enables you to review assignments.

Details Grid

Click on a Service Request link in the Details grid to display the actual service request. This grid also displays a service request's fields including the business unit, request type, service center, status, priority, the work order ID, the date required, and an indicator that a requester has replied to a service request note from the agent or technician.

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Assignments Grid

This grid displays a service request fields, which include the subject, request type, related request, requested for, assigned by, and assigned to fields.

Note. Once a work order technician links to the Service Request Inbox from the Technician's Workbench page in PeopleSoft Maintenance Management, the Assigned To field contains the technician's name and lists only this technician's assigned service requests.

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CHAPTER 14

Creating a Work Order

This chapter presents an overview of Oracle's PeopleSoft Enterprise PeopleSoft Maintenance Management work orders and work order task creation and discusses how to:

- Create a work order.
- Create work order tasks.
- Use the Work Order - Miscellaneous page.

Understanding Work Orders

This section discusses:

- An overview of work orders.
- The work order header.
- Work order tasks.
- Asset downtime entry.
- Work order task accounting.
- Work order creation from a service request.
- Work order creation from PeopleSoft Project Costing and PeopleSoft Program Management.
- Work order creation from PeopleSoft CRM Help Desk 8.9 and above and third party help desk applications.
- Work order copy.

An Overview of Work Orders

Maintenance planners, physical plant administrators, facilities managers, technicians, and equipment operators use work orders to plan, schedule, dispatch, track, account for, and report on the construction, repair, maintenance, and disposal of an organization's physical assets. Prior to creating a work order, along with PeopleSoft Maintenance Management, you must install and set up PeopleSoft Asset Management, PeopleSoft Project Costing, and PeopleSoft Purchasing, as well as optional product integrations such as PeopleSoft Inventory.

Important! You must set up either a work order-managed or Project Costing-managed project before you can create a work order. Make sure the project's business unit is specified in the work order business unit's Integrations page, and add the project to the Work Order-Projects Association page in Setting Up Financial/Supply Chain, Product Related, PeopleSoft Maintenance Management before you create a work order.

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See Chapter 3, "Understanding PeopleSoft Maintenance Management," page 13.

The two different formats for work orders in PeopleSoft Maintenance Management are:

- Work orders, which can have multiple work order tasks and can involve the definition and scheduling of multiple types of resources.
- Express work orders, which are easily entered and require minimal resources and data entry.

You can initiate the creation of work orders from several different applications and options in the system, which include:

- PeopleSoft Project Costing.
- PeopleSoft CRM Help Desk 8.9 and above and third-party help desk applications.
- PeopleSoft Maintenance Management service requests.
- PeopleSoft Program Management.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," page 57.

This section discusses:

- The Work Order component.
- Express work orders.
- Preventive maintenance work orders creation.
- Condition-based maintenance (CBM) work orders.

The Work Order Component

The standard work order in PeopleSoft Maintenance Management is a comprehensive planning and scheduling vehicle with extensive functionality in comparison to the express work order. You can create a work order directly in PeopleSoft Maintenance Management using the Work Order component, or you can create it by initiating it from a service request, PeopleSoft Project Costing, PeopleSoft Program Management, PeopleSoft CRM Help Desk 8.9 and above and third party help desk applications, or from a CBM alert.

The pages in a work order include:

- The Work Order page.

  You define the work order header, which includes the overall status of the work order, the work order approval status, service request information, if applicable, and the capability to approve a work order, if applicable, and the ability to add supplemental data, attachments, and notes. You can also specify an asset that applies to the overall work order. You can select a work order job template to apply to this work order, and you can create one or more work order tasks. The work order header status is automatically determined by the system based on the most outstanding status of all the work order tasks associated with this work order. Users cannot directly modify the status of the header. The work order status is indirectly changed when users change the work order task status and is only changed when you save the work order.

  Note. You can set up more detailed task information on the Requirements and Schedules pages.

- The Requirements page.

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The Requirements page is used to set up the details of each work order task. When you create a work order, the first work order task is automatically created. You can create additional work order tasks on the Requirements page of the work order and enter the details for each task, such as the task's start and end dates, the scheduler and supervisor responsible for the task, and the percentage of overlap between tasks. You can also change the status for a work order task on this page. When you change the status for each task, the system performs a weighting of the statuses of each task to determine the status for the overall work order. The status of the work order continues to change as the statuses of the tasks change.

Note. You also can create additional work order tasks from the Work Order page, Schedules page, and Actuals page.

You can enter a the location of the work and, if this is a Project Costing-managed work order, you can select an activity to associate with the task. If this is a work order-managed project, the activity is automatically generated. If the shop is set up for crew scheduling and a preferred crew was selected in the shop, this preferred crew displays in the work order. You can change the shop that the crew is associated with from this page, if necessary. You can click the Setup Accounts link to set up the asset capitalization filter and minimum, and select the chargeback rate set or rate plan options, if chargebacks are enabled for the task in PeopleSoft Project Costing and at the business unit, shop, or work order type level.

You can select the asset affected by the task, and a description of its problem. You can also review any warranties associated with the asset and create a warranty claim from this page. There are links that enable you to review the asset's details, the asset's maintenance history, enter asset downtime, and, if the asset is associated with a meter, review the asset's meter reading history. You can also review the asset's calendar to determine when the asset is available for scheduling.

You can optionally define the labor, inventory, purchased and on-hand, and tool resource requirements needed to perform the task. In addition, links are provided for instructions, a checklist, attachments, supplemental data, notes, and task templates. Selecting a task template enables you to copy requirements to a task that is routinely performed for a work order, saving data entry time. You determine at the business unit level or at the shop level whether you want to calculate estimated costs based on these requirements. Requirement definitions are discussed in detail in the Defining Work Order Task Requirements chapter of this PeopleBook.

See Chapter 17, "Defining Work Order Task Requirements," Understanding Work Order Task Resource Requirements, page 425.

- The Schedules page.

  If you plan to schedule resources, you enter a scheduled start and end date for each work order task. You can access the same additional information and asset information fields and links that appears on the Requirements page. If you chose to set up resource requirements, you can copy the labor, inventory, purchased and on-hand, and tool resource requirements from the Requirements page to the schedules. You can optionally schedule specific labor, inventory, purchased and on-hand, and tool resources for each task. You determine whether you want to schedule labor, inventory, or tools resources at the business unit and shop levels. You can also access instructions, a checklist, attachments, task templates, supplemental data, and notes from the Schedules page. Normally a scheduler is designated on the Requirements page of the work order and the scheduler uses the Work Order Workbench component to access work orders to perform the scheduling.

  Note. If you indicate in the work order business unit, shop, or work order type associated with a work order that a work order requires approval, then the Schedules and Actuals pages do not appear until the work order is approved.

  See Chapter 18, "Scheduling a Work Order," page 443.

- The Actuals page.

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The Actuals page shows the actuals entries for resources associated with a work order task. You enter actuals data on the Technician Workbench and Work Order Completion components, as well as through PeopleSoft Payables and PeopleSoft Project Costing. Actuals data includes labor time entry, material and tools usage, and procurement data.

See Chapter 21, "Executing and Completing Work Orders," page 595.

- The Cost page.

  This page shows a summary of the total estimated, scheduled, and actual costs for each resource type, along with the variances. In addition, a second grid displays the estimated, scheduled, and total costs, along with a variance, for each work order task. The Task Actuals grid shows the actual totals for the resources in each work order task, and also enables you to click the Capitalize button to display the capitalized costs and the Chargeback button to display the actual amounts charged back to other organizations in the enterprise by means of PeopleSoft Project Costing. You can also click on the task resource total to display the task line details in another grid.

  You must run the following Cost Collection processes in PeopleSoft Project Costing to collect the costs from PeopleSoft Payables, PeopleSoft Inventory, PeopleSoft Payables, Procurement, and PeopleSoft Maintenance Management (tools).

  Labor costs are collected by running Project Costing, Cost Collection, Expenses.

  Inventory costs are collected by running Project Costing, Cost Collection, Inventory.

  Procurement costs are collected by running Project Costing, Cost Collection, Payables.

  Tool costs are collected by running Project Costing, Cost Collection, PeopleSoft Maintenance Management.

  The actual costs are not updated for labor costs until you access either the Technician Workbench or the Work Order Completion components and enter each resource's time. On the Technician Workbench, you must save the time, and stage time entries to the Time Staging for Project Transaction table (EX_PROJ_RES_STG) in PeopleSoft Payables. In the Work Order Completion component, the time entries are staged automatically and you do not have run the Stage Time Entries process from PeopleSoft Maintenance Management. For either component, you must run the cost collection process (PC-TLX) in PeopleSoft Project Costing, and run the Cost Summarization process in PeopleSoft Maintenance Management to display the costs on the Costs page. . Once the entries are staged in PeopleSoft Payables, you run the PeopleSoft Payables to PeopleSoft Project Costing Application Engine process (PC_EX_TO_PC) in PeopleSoft Project Costing to pull staged time transactions from the Time Staging for Project Transaction table into PeopleSoft Project Costing tables and run the Cost Collection process (PC-TLX) to store the transaction costs are stored in the PROJ_RESOURCE table. PeopleSoft Project Costing applies its rules, capitalizes the costs in PeopleSoft Asset Management, if appropriate, and posts the costs to the general ledger business unit associated with the work order business unit. When you run the Cost Summarization process in PeopleSoft Maintenance Management or run the Work Order Close process, PeopleSoft Project Costing updates the total actual costs for the work order task stored on the Costs page of the work order.

  For inventory transactions, you schedule, commit, and reserve selected inventory items. Transaction 231 inventory record(s), which are the transactions or records that are used in cost collection, are created when a clerk issues one or more items from PeopleSoft Inventory. You schedule the inventory in PeopleSoft Maintenance Management and commit and reserve the inventory. You must access Cost Accounting, Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Cost Accounting Creation to create cost accounting entries to stage data to the PeopleSoft Project Costing tables . (CM_ACCOUNTING_LN). The PeopleSoft Project Costing Cost Collection process pulls the data to the PeopleSoft Project Costing PROJ_RESOURCE tables. When you run the Cost Summarization process in PeopleSoft Maintenance Management either manually or when the Work Order Close process runs, the system updates these actual inventory costs on the Costs page of the work order.

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When you schedule noninventory items or open description materials using the Purchase/On-Hand tab in the work order, the estimated costs are staged either as a requisition or a purchase order directly from the work order. Once a voucher is created and paid, possibly taking into account additional costs and discounts, the voucher is posted and run through the Accounts Payable and is sent to the PeopleSoft Project Costing interface. When the Cost Collection process is run in PeopleSoft Project Costing, the costs are pulled into the PROJ_RESOURCE tables. When you run the Cost Summarization process in PeopleSoft Maintenance Management either manually or when the Work Order Close process runs, the system updates these actual Purchase/On-Hand costs on the Costs page of the work order.

Important! Inventory materials that are floor stock and noninventory purchased goods and services marked as on-hand are not calculated in the overall costs of the work order.

Note. The usage amounts that you enter on the Technician Workbench Materials tab is not used in determining Inventory or PeopleSoft Purchasing costs. This data is informational only for recording actual materials usage versus what was issued for the task.

When you enter and save the tool usage amounts on the Technician Workbench component or the Work Order Completion component, transactions are sent directly from PeopleSoft Maintenance Management to PeopleSoft Project Costing. When you run the Cost Collection process for PeopleSoft Maintenance Management in PeopleSoft Project Costing, the transaction amounts are pulled into the PROJ_RESOURCE table. When you run the Cost Summarization process in PeopleSoft Maintenance Management either manually or when the Work Order Close process runs, the system updates these actual Tool costs on the Costs page of the work order.

The Costs page is described in the Closing Service Requests, Work Order Tasks, and Work Orders chapter.

See Chapter 22, “Closing Service Requests, Work Order Tasks, and Work Orders,” page 629.

- The Miscellaneous page.

  This page presents a summary of the work order header information, the current status of the work order, who last modified the work order and when, individuals responsible for the work order, and the dates that the work order was completed and then closed.

  A maintenance type is required to close preventive maintenance work orders. You can set up a default maintenance type in the work order business unit and that value will display in the Maintenance Type field on the Miscellaneous page. You can override this value. Make sure this value is specified for each work order to avoid any problems at closing.

  You can indicate that this is a standing work order, which prevents it from being closed. However, you can close each task within a standing work order either manually or through the batch close process. If all the tasks are closed in a standing work order, the work order will still remain not closed. Standing work orders are typically used to capture frequently occurring, repetitive work, such as replacing light bulbs. You can close a standing work order by clearing the Standing Work Order check box and changing any not closed, complete, or cancelled task statuses to *Complete.*

  If this work order is a child of another work order, you can select the parent work order. If this is a parent work order and child work orders were created, the child work orders are listed in a grid on this page. If this work order was created based on another work order (for example, you may create a work order to change the oil and discover that the brake pads are bad and create a work order to perform that work), then you can select a value for the Originating Work order field.

  You can input values into any supplemental data fields that you established.

  You can click the Technician Work Order Access link to enable resources who work in shops other than the primary shop specified in a work order to access the work order using the:

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- Technician Workbench and update or charge against assigned work order tasks.
- Express Work Order and search for existing work orders.

You set up work order access security for shops in the work order business unit. You can access the User Preferences - Maintenance Management page to authorize specific users to access the Work Order Access page from a link on the Miscellaneous page of the Work Order component. The link is only available on the Miscellaneous page if shop security or shop and resource Pool security is enabled on the work order business unit Definition page. The Work Order Access page enables you to set up shops to control which resources have access to work orders and work order tasks in the Technician Workbench or the Express Work Order. The primary shop associated with the work order is already listed. If you created any cross-shop labor assignments, any shops specified in a task are also listed. You can manually add any other shops to the list.

There is no relationship between the specific resources assigned to a work order task and WO Access security. The major consideration is whether or not your employee ID is defined for a shop that has access or defined in a resource pool that has access, depending on the option you selected in the work order business unit. With Work Order Access security enabled, if an employee is not associated with an authorized shop or resource pool, then that employee does not have access to the Technician Workbench component or to search for express work orders in the Express Work Order component, even if the employee is a scheduled resource on a task.

You may not want every resource in a shop to have access to work orders and work order tasks on the Technician Workbench or the Express Work Order. You can restrict this access by selecting the Apply Work Order Access Security check box on the User Preferences - Maintenance Management page.

See Chapter 5, “Setting Up PeopleSoft Maintenance Management System Parameters,” Understanding Work Order Business Unit Setup, page 75.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, “Defining User Preferences,” Defining Maintenance Management User Preferences.

Express Work Orders

An express work order is the simplest and fastest way to create a basic work order. Use this option to create work orders that require few resources and little or no scheduling. You identify the asset requiring work, the scheduler, and the parent work order, if this work order is being created based on another work order. You select a project and activity, if this is a PeopleSoft Project Costing managed work order. If this is a work order managed work order, the a default project value displays and the activity field is inaccessible. You have the option of defining the inventory and purchased and on-hand resources needed to perform the work. It is also possible to add attachments, notes, and supplemental data to this type of work order. You can only create an express work order by selecting the Maintenance Management, Work Order Management, Express Work Order menu option. Users cannot create an express work order from PeopleSoft CRM Help Desk , third party help desk applications, PeopleSoft Project Costing, PeopleSoft Program Management, or service requests.

Work order access security can be applied to control who searches and updates existing express work orders. The primary shop that is entered to create the work order is automatically added to the work order access security shop list, which means that only authorized resources assigned to that shop can access the shop’s express work orders. If, for some reason, you wanted to authorize additional resources from another shop to access that express work order, you must access the Work Order component and add any additional shops to the Work Order Access page from the Miscellaneous tab. If you selected Resource Pools for work order security access in the work order business unit, then any employee, who is assigned to a resource pool can search for existing express work orders whose project/activity is associated to that resource pool.

Note. You cannot enter labor or tools requirements in an express work order.

See Chapter 24, “Using Supplemental Data,” Understanding Supplemental Data, page 653.

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Preventive Maintenance Work Order Creation

Preventive maintenance work orders are normally used to maintain assets on a routine basis. To generate a preventive maintenance work order, you must set up a preventive maintenance schedule, in which you identify the asset (or assets) being maintained and the type of maintenance to be performed, associate a work order job template, and specify the intervals between work orders based on date-based and meter-based schedules. Once a schedule is set up, you can run the Preventive Maintenance process (WM_PM) to generate work orders, or run the Preventive Maintenance Projection process (WM_PM_PJC) to determine the next maintenance due date and generate preventive maintenance projections and work orders. You can review these projections online or load them into Microsoft Project. Once the work orders are generated, you access the work order using the Work Order component, where you can modify the work order and schedule the resources, if applicable. You cannot access generated preventive maintenance work orders using the Express Work Order component.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Work Orders, page 283.

Condition-based Maintenance Work Orders

Condition-based maintenance enables you to make maintenance decisions based on the actual condition of an asset. You can set up Web Services to enable external systems measure and analyze current readings on equipment and determine whether the condition of the equipment is outside of normal operating parameters. When the condition is outside normal operating parameters, the external system issues CBM alert or a user enters the alert manually indicating that the asset needs maintenance. A CBM coordinator associated with a specific work order business unit and shop is notified of the alert either through email or workflow. When a new alert is saved, the Update PM Schedule, Create a Work Order, and Close Alert buttons become available. The CBM coordinator can update the preventive maintenance schedule so that the Preventive Maintenance process generate a condition-based work order in the next run, or create a work order from the Condition-Based Maintenance Alert page. The status of each alert is tracked in the Alert Status History.

You must set up workflow and specific rules in Maintenance Management to enable condition-based maintenance.

See Chapter 11, "Setting Up and Using Condition-based Maintenance," page 271.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," page 283.

The Work Order Header

The work order header consists of data that controls the entire work order.

To add a work order in the Express Work Order component and in the Work Order component, you must enter:

- A work order business unit.

  This field is required. You can enter a default value at the user preferences level.

- A work order ID.

  When you create a work order, the Work Order ID field default value is *NEXT* if you selected the Work Order Auto Numbering check box in the work order business unit. For each new work order, the system uses the next work order ID based on the last work order number tracked in the business unit. However, you can override *NEXT* with any number you choose for the work order. If you left the Work Order Auto Numbering check box in the work order business unit cleared, you must enter a work order ID manually when you create a work order.

- A work order type.

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This value, such as CAPT (Capital Work Order), PM (Preventive Maintenance), and CM (Corrective Maintenance), is used to categorize the work for analysis purposes and is required. It also is included as part of the control default order, the accounting default order, and the project default order set up in the work order business unit.

- A service group.

  This value is required. You can enter a default value at the business unit level and user preferences level. Service group is also included as part of the project default order and the accounting default order in the work order business unit. This value is also used to categorize work order information.

- A shop.

  This value is required. You can enter a default value at the business unit level and user preferences level. Shop is also included as part of the control default order, in the work order business unit.

- A priority code.

  This value is required. It enables you to prioritize work orders to enable a scheduler to search for and locate work orders by priority on the Work Order Workbench and is used to sort work orders in some of the PeopleSoft Maintenance Management pagelets.

- Required start and end dates.

  When you create a work order, the current system date is the default value in both the Required Start and Required End fields. You can enter the correct start and end dates for the work order in the Add page, or you can override the dates in the work order's header information in the Work Order page.

When you access the Work Order page, the work order header information:

- Identifies who created the work order and when.
- Establishes a date for the entire work order to begin and end and how long the total work should take.
- Displays the current status of the work order.
- Identifies if a service request is associated with the work order.
- Enables the user to select or override the work order type and priority and shop.

  If you change the work order type, it may change the default project.

- Indicates the approval status of the work order, enables a user to approve a work order, and provides a link to enable a user to review the approval history.
- Enables the user to add attachments (documents, drawings, and such) that apply to the overall work order.
- Enables the user to enter values into supplemental data fields, which you can set up for work orders.
- Enables the user to add notes that are relevant to the overall work order.
- Enables a user to select the asset on which the technician is performing the work specified in this work order along with the location of this asset.

  Important! If you selected the Multiple Assets Per Work Order check box in the work order business unit, then you can select an asset in the work order header and different assets for the work order tasks. If you do not select the check box, then the asset field does not display for any of the work order's tasks. In this case, the asset selected in the work order header also applies to any tasks created for the work order.

- Enables a user to view any work history associated with this asset, as well as any associated warranties.
- Enables a user to select a job template to copy into the work order.

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The list of job templates is based on a combination of the asset category and the problem, cause, and resolution values that the user selects to search for the appropriate job template. You can only copy one job template per search to the work order. However, you can perform multiple searches to copy more than one job template to the work order. The work order tasks identified in the job template are appended to the end of the work order's task list.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Setting Up a Work Order Business Unit, page 74.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding PeopleSoft Maintenance Management Work Order Parameters, page 108.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Shifts, Schedule Patterns and Periods, Shops, and Crews, page 194.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," page 57.

Work Order Approval

The work order approval link in the work order header displays if you selected the Workflow Approval option in the work order business unit. If you selected Pre-Approved, the Approval Status field in the work order indicates that the work order is *Approved*. You must set up work order approval workflow before you can approve a work order or manage work order approvals.

Note. If the work order header status is *Canceled*, then the work order approval process is not invoked.

See Chapter 10, "Configuring Work Order Approval Workflow," Understanding the Work Order Approval Workflow Architecture, page 251.

See Chapter 15, "Approving Work Orders," Understanding the Work Order Approval Process, page 407.

Asset Warranty Claims

You can create a warranty claim for assets specified in the work order or work order tasks.

See Chapter 16, "Managing Warranty Claims," Understanding Warranty Claim Management in PeopleSoft Maintenance Management, page 415.

Work Order Tasks

You create work order tasks to specifically define:

- The problem that needs to be resolved.
- The work that needs to be completed.
- The length of time that it takes to complete each task.
- The asset associated with each task.
- The status of each task.
- The resources needed to complete each task.

You can optionally define labor, inventory, purchased and on-hand, and tool resource requirements for a work order task and generate estimated costs based on these resources. In addition, you can optionally schedule resources for each task.

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Note. You must identify the work order task status that you want to serve as the initial status in the work order when you set up your a work order tasks.

You can select data that is relevant to each task, which includes:

- Additional Task Data.

  You can specify the work location and identify the supervisor, scheduler, and a key contact. If you intend to schedule crews for this task, you can identify the preferred crew that you want to use for this task. Selecting the crew associates this unscheduled task with Crew Scheduling Workbench after you determine crew capacity. If the crew is associated with a shop, other than the primary shop in the work order, you can associate that shop with this crew.

- Information for the selected asset.

  You describe the characteristics and details about the asset. You can identify if the asset is being installed, removed, or retired. There are numerous links related to the task's asset, which may include links to the:

  - Work Order History
  - Asset Maintenance History
  - Asset Details
  - Asset Downtime
  - Asset Calendar
  - Warranty Claim
  - Meter History

- Problem Reporting

  You can identify the problem group, problem, cause, and resolution to associate with a asset-related or nonasset related task. Specifying these values enable you to search for a work order job or task template, which already has requirements defined for this type of problem, and to categorize this task in order to later search for this task or other work orders and tasks associated with this PCR data.

You can use work order job templates and work order task templates to simplify the creation of work orders and tasks that you use frequently. You can select a work order task template at the task level that provides the resource requirements for a single task. You select the work order job template at the work order header level. It consists of one or more job steps that are associated with work order task templates. When you select a job template, all the data from all the work order task templates associated with the work order job template are copied to the work order tasks. You can only access one work order job template at a time to copy to the work order. However, if you want to add more than one job template to the work order, you can click the Job Templates link again and select another job template. The second job template is appended to the work order after the data copied from the first template.

Note. When you create a job template (Set Up Financials/Supply Chain, Product Related, Maintenance Management, Templates, Work Order Job Template) and you search for a work order task template to associate with the job template, the search results only consist of work order tasks templates that fall within the effective date parameters of the job template. However, when you copy a job template to the work order, the system only allows you to copy job templates with effective dates that fall within the parameters of the work order header's Required Start Date field. Also, only work order task templates with effective dates that fall within the parameters of the work order task's Required Start Date field are copied to a work order task. If the Required Start Date is not available in either instance, then the current system date is the controlling factor.

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You can also copy the data from a single work order task template to a task. If you copied one or more job templates to a work order, you can copy one or more single task templates to the work order as well.

When the resource requirements are copied to the work order tasks either from tasks listed in a job template or from a single task template, then the data is edited just like any other work order task data, and the resource cost data from the individual tasks is recalculated and rolled up from the individual tasks to the Estimated Cost fields in the work order's Costs page.

See Chapter 19, "Performing Crew Scheduling," page 523.

See Chapter 17, "Defining Work Order Task Requirements," Understanding Work Order Task Resource Requirements, page 425.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Work Order Statuses, page 144.

See Chapter 18, "Scheduling a Work Order," Understanding Resource Scheduling, page 443.

Asset Downtime

You can enter and update the planned and actual start and end dates and times that an asset will not be available for use by clicking a link in the Work Order component, accessing the Downtime Entry component, and clicking a link in the Technician Workbench in PeopleSoft Maintenance Management. You select a Downtime Reason, which you must set up in advance. You can review an asset's downtime history from PeopleSoft Maintenance Management via the Asset Downtime Review component. When the work order is closed, PeopleSoft Maintenance Management updates downtime for the asset in the Asset Maintenance History in PeopleSoft Asset Management.

Important! The entry of asset downtime in PeopleSoft Maintenance Management does not control whether or not you can schedule the asset. Downtime is informational only, and does not drive functionality.

Work Order Task Accounting

You can click the Set Accounts link on the Requirements page to access the Work Order Task Accounting page. Use this page to set up asset capitalization, retirement, and chargeback information for the work order task and to generate accounting transactions based on the GL business unit set up in the work order business unit and send this accounting data through the subsystems to PeopleSoft Project Costing for cost and billing calculations. This only applies to work orders associated with work order-managed projects.

Important! Work orders associated with Project Costing-managed projects do not use this page to set up accounting for chargebacks. Chargeback accounting for work orders associated with Project Costing-managed projects are handled completely by PeopleSoft Project Costing.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," page 13.

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Asset Capitalization for Work Order-managed Projects

You can select a filter ID and a capitalization minimum amount for PeopleSoft Project Costing to use to calculate the capitalization amount for an asset. The capitalization minimum amount that you specify means that the cost to repair, maintain, or build the asset must be equal to or greater than the amount specified in this page before PeopleSoft Project Costing will calculate a capitalization amount to apply to the asset in PeopleSoft Asset Management. You identify a filter that is set up in the PeopleSoft Project Costing Express Asset Filter Criteria component. This filter criteria specifies which transaction costs are allowed to make up the amount to capitalize. For example, Filter 1 could establish that material and labor actuals should be capitalized, and Filter 2 could indicate that only labor actuals should be capitalized.

Chargebacks for Work Order Managed Projects

PeopleSoft Project Costing integrates with PeopleSoft Maintenance Management to enable you to charge back these costs to a different organization such as a different GL business unit, operating unit, or department. You use the Work Order Task Accounting page to enable these chargebacks. This only applies to work orders that are associated a with a work order-managed project. For project-managed work orders, the charging back of costs is controlled in PeopleSoft Project Costing using standard PeopleSoft Project Costing functionality.

Before you can generate chargebacks for work orders associated with work order-managed projects, you must:

- Select the Enable Organization check box on the Set Up Financials/Supply Chain, Installation Options, Project Costing page.
- Select Project Costing, Project Definition, Organization and select a GL business unit for the project that will be associated with the work order.
- Select the Generate Chargebacks check box on the Set Up Financials/Supply Chain, Business Unit Related, Work Order Definition, Definition page. You can override this option at the shop or work order type levels.

  Note. You cannot select this field if you have not selected the Enable Organization check box on the Installation Options - Project Costing page listed above.

- To calculate chargebacks for a work order task, you set up the Task Accounting page, where you select the ChartFields that the chargeback will be charged to when the accounting rules are applied in Project Costingl

See Chapter 14, “Creating a Work Order,” Project Costing Price Engine, Rate Sets, and Rate Plans, page 374.

Project Costing Price Engine, Rate Sets, and Rate Plans

For work orders associated with work order-managed projects, accounting entries for any transactions generated from performing work order tasks in PeopleSoft Maintenance Management are created in PeopleSoft Payables (by means of shared functionality) for labor, PeopleSoft Inventory for inventory items, PeopleSoft Purchasing and PeopleSoft Payables for noninventory items, open descriptions, and services procured, and PeopleSoft Project Costing for tool usage costs.

The Project Costing Price Engine (PC_PRICING) is run on the costs generated from the feeder systems and the tool costs generated in PeopleSoft Project Costing. PeopleSoft Project Costing applies accounting rules, which are determined by the selection of *Rate Set* or *Rate Plan* for the value of the Rate Selection field on the Work Order Definition - Integration page of the work order business unit, and the Define Shop - Definition page. The values selected on these pages determine the default value that will be used to by the PeopleSoft Project Costing Pricing Engine.

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Rate sets do only one level of pricing. For example, if you an Actual row of $100 is calculated in PeopleSoft Maintenance Management and sent to the subsystems. The rate set WO_ACT1 is specified in the work order business unit and applies to the work order task row. This rate set indicates that actual rows are to be marked up by 20 percent. The rate set is applied and the new row is referred to as the markup row and is priced at 120 USD. Since you specified rate set, this is the only rate that applies.

However, what if you want the Pricing Engine to apply another rate WO_DISC1, which indicates that actual rows are discounted by 5 percent? Since you selected rate set on the Integration page of the work order business unit, you cannot apply this second rate to the transaction, which would created a newly priced row for the discount of 95 USD in PeopleSoft Project Costing. In this case, you would select a rate plan.

A rate plan is a collection of rate sets that the system executes in a specified order. Continuing with our example, if you had selected Rate Plan, you can create a rate plan in PeopleSoft Project Costing, for example, WO_RATEPLAN1, that contain both of the rate sets, WO_ACT1 and WO_DISC1. If we associate WO_RATEPLAN1 with the work order then for an actual row of 100 USD, two priced rows are created in PeopleSoft Project Costing:

- Row 1 = 100 USD (This is the transaction originating from PeopleSoft Maintenance Management.)
- Row 2 = 120 USD based on WO_ACT1 rate set (20 percent markup).
- Row 3 = 95 USD based on WO_DISC1 rate set (5 percent discount).

The rate set is associated with a rate template that resides in PeopleSoft Project Costing and contains four rate options specific to PeopleSoft Maintenance Management:

- WBI, which is the work order labor bill rate option.
- WCO, which is the work order labor cost rate option.
- TBI, which is the work order tools bill rate option.
- TCO, which is the work order tools cost rate option.

Once the Pricing Engine (PC_PRICING) runs, these costs reside in the Project Resource (PROJ_RESOURCE) table. When a work order transaction is priced, the Pricing Engine (PC_PRICING) updates the GL_DISTRIB_STATUS in PROJ_RESOURCE to *Hold*, which prevents the Accounting Engine (PSA_ACCTGGL) from selecting or processing any rows with this status. When a work order task is closed, the Work Order (task) Close Process (WM_CLOSE) updates GL_DISTRIB_STATUS to *Costed*. The rows in PROJ_RESOURCE are then selected by the Accounting Engine to apply the accounting rules, which enables the Journal Generator to generate chargeback accounting entries.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , “Integrating with Maintenance Management,” Setting Up Rate Sets and Asset Integration Rules.

Work Order Creation from a Service Request

Employees in an organization can create and submit a self-service request online to an agent concerning a problem they may be experiencing which can range from the need to replace a light bulb in their office to problems with their computer hardware and software. Many service requests are fulfilled without creating a work order. However, if an agent receives requests concerning problems that cannot be resolved easily, then the agent creates a work order directly from the service request. When an agent creates a work order from a service request, the work order is created with a minimum of data. Later, a planner or scheduler can update the work order with any missing information and assign it to the appropriate technicians.

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For example, an employee creates a self-service service request to have a file cabinet moved from one location in the employee's (requester's) office to another location. Because this type of work requires the use of facilities personnel to physically move the filing cabinet, the agent that reviews the service request creates a work order and work order task for a technician to move the filing cabinet. The work order is assigned and scheduled (if necessary). The technician then moves the filing cabinet, enters the time it took to perform the work in the work order, and marks the work order task as complete. The requester is notified that the work order is complete and has a specific amount of time to respond before the service request is closed. A work order task is automatically closed after the number of close days from the completion of the work order task, which is specified on the work order business unit definition, has expired. The closure of the work order is of no concern to the requester.

See Chapter 13, "Creating a Service Request," Understanding Service Request Creation and Use, page 347.

Work Order Creation from PeopleSoft Project Costing or PeopleSoft Program Management

All work orders are associated with a project created in PeopleSoft Project Costing and at least one project activity that is either created in PeopleSoft Project Costing or generated in PeopleSoft Maintenance Management, depending on whether the project you create to associate with work order is:

- A Project Costing-managed project.
- A work order-managed project.

In PeopleSoft Program Management and PeopleSoft Project Costing, you can create a work order from an activity. To do so in PeopleSoft Program Management, you access the Program Management, Activity Definitions, Resources, Resources by Activity page, and in PeopleSoft Project Costing, the navigation is Project Costing, Activity Definitions, Team. Both the Resources by Activity and Team pages contain a Create Work Order button.

If you have PeopleSoft Program Management installed, you can identify asset (tool), material, and labor resources for an activity, and when you are ready to create a work order, you click the Create Work Order button to bring up a page that enables you to select which of the activity's resources you want to copy to a new work order.

If you have only PeopleSoft Project Costing installed, clicking the Create Work Order button will take you to a page from which you can select only the labor resources that you wish to place on the new work order you are creating. Regardless of whether you are using PeopleSoft Project Costing or PeopleSoft Program Management, the Create Work Order page that appears enables you to select the resources; identify the work order business unit, work order type, service group, and shop, and create a new single task work order with the selected resources automatically loaded to as requirements of the work order task.

Generic resources serve as place-holders for resources specified for a project. If you have PeopleSoft Project Costing and PeopleSoft Program Management installed, you can assign labor, asset, material, and other generic resources to a project. You can also create a work order and assign one or more these generic resources to the work order. When you define a generic resource for an asset (tools or equipment) in PeopleSoft Project Costing, you select the asset type, subtype, manufacturer ID, and model values for the asset. When you add generic labor resources to a work order, you can select a craft for the resource. When you schedule the work order, you can select a specific resource ID to replace the generic resource.

Note. For work order-managed projects, when you set up the PeopleSoft Project Costing Options component for a Project Costing business unit in Setup Financial/Supply Chain, Business Unit Related, Project Costing, Project Costing Options, you should select *Optional* for the Input Control, Business Unit, Project, and Activity field value.

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No accounting activities are performed in PeopleSoft Maintenance Management. Instead, as work is performed and entered in the work order in PeopleSoft Maintenance Management, the labor, inventory, and purchase costs are sent to the feeder systems where the appropriate accounting is performed, and then sent to PeopleSoft Project Costing where it calculates the costs, capitalizes costs, and sends chargeback calculations to PeopleSoft General Ledger. Tool usage actual costs are distributed and calculated directly in PeopleSoft Project Costing. You can run the Cost Summarization process to collect costs from PeopleSoft Project Costing and display them as actuals in PeopleSoft Maintenance Management.

Work Order Creation from Help Desk Applications

You can integrate PeopleSoft CRM Help Desk and third party help desk applications with PeopleSoft Maintenance Management using the Integration Broker. You must perform the normal setup procedures for PeopleSoft Maintenance Management, as well as set up assets in the PeopleSoft Asset Management asset repository. This provides the foundation to enable you to create work orders from help desk applications.

When a help desk agent receives a call or a self-service notification that involves a problem that the agent cannot resolve without the intervention of one or more technicians, the agent can create a PeopleSoft Maintenance Management work order directly from the help desk application. The help desk application can access the assets in PeopleSoft Asset Management and the problem tree, shops, work order statuses, and work order priorities in PeopleSoft Maintenance Management using PeopleSoft Integration Broker. In addition, the help desk application maintains a history of all transactions that are sent to PeopleSoft Maintenance Management.

When a help desk agent creates a work order, the system sends a series of messages between PeopleSoft Maintenance Management and the help desk application using PeopleSoft Integration Broker. The help desk initiates the first message to create a work order to PeopleSoft Maintenance Management. Then, PeopleSoft Maintenance Management responds by sending a message that contains the new work order number and the status. If the system fails to create a work order, then the response message contains the errors that are relevant to the failure.

Once PeopleSoft Maintenance Management creates the work order, the system notifies the help desk of key events, which include a change in the work order header status, a change in the work order description, or a request for additional information. A request for information is usually sent to the agent in an email containing an embedded URL, and the technician's workbench in PeopleSoft Maintenance Management indicates that the technician is awaiting a reply to this request. If the agent responds to the email through the URL, the work order workbench indicates that the agent replied to the email.

A technician assigned to a work order can also add a note to which the agent can respond within the work order without using email. After the work order is completed, the system updates the help desk application with the status change and notifies the agent of this status.

If nothing else is necessary to complete the work order, the agent indicates that the problem is resolved and notifies the requester. If the requester is satisfied with the solution, then no further action is required. The agent can close a case without affecting the work order. The technician can manually close the work order or the work order will close automatically within a given time period. However, if the solution was not satisfactory, the requester can instruct the agent to keep the help desk case open. The help desk agent might then respond by creating a new work order.

To create a work order from a help desk application, you can assume that:

- All systems sending information track their requests or cases by business unit.
- Person data used for help desk case creation is part of the help desk system and is not related to person data used in PeopleSoft Maintenance Management.

  Because the help desk agent's contact information displays in the work order header, the help desk agent must also be set up in either the PeopleSoft FSCM or HRMS source data tables.

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The help desk application is responsible for retrieving all asset information from the PeopleSoft Asset Management asset repository and for maintaining the history of all transactions sent to PeopleSoft Maintenance Management.

PeopleTools Integration Broker is used to issue a series of asynchronous messages that are sent between the help desk application and PeopleSoft Maintenance Management. PeopleSoft CRM Help Desk 8.9 and above and third party help desk applications must be set up to successfully send and receive the required Integration Broker messages. Activities that you must perform include:

- ·Setting up Integration Broker and activating application messages from PeopleSoft Maintenance Management to the help desk application on both the help desk application and PeopleSoft Maintenance Management databases.
- Setting up Integration Broker and activating all application messages from PeopleSoft Asset Management to the help desk application on both the help desk application and PeopleSoft Asset Management databases.
- Setting up problems in the PeopleSoft Maintenance Management Problem Tree.
- Selecting the Publish Data flag for the problems you want to be available to the help desk application.
- Entering work order default values (business unit, service group, type, & priority) for all problems to be published to the help desk application.
- Executing the COPY_* messages to populate the corresponding tables in the help desk application.

The following table describes the messages that are sent between the two products by means of the Integration Broker:

Message	Processing	Function
COPY_PROBLEM_TREE	Outbound	Publish All Problem Tree information for problem trees set up in PeopleSoft Maintenance Management. The Problem Tree page (WM_PROBLEM_TREE) in PeopleSoft Maintenance Management has a Publish Data check box in the top level of the tree, which, when selected, sends a problem's branch information to the help desk, which uses it to identify and classify a problem.
COPY_SHOP_LOC	Outbound	Publish All Shop Location information. This message copies all shop locations to the help desk application. These are the shops (service locations) available to the help desk agent when creating a work order.

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Message	Processing	Function
COPY_WO_STATUS	Outbound	Publish Work Order Header Status Code information. This message copies the work order statuses to the help desk application. These are the work order statuses returned to the help desk from PeopleSoft Maintenance Management when a work order is added or updated.
COPY_WM_PRIORITY	Outbound	Publish all Work Order Priority information. This message copies the work order priority codes to the help desk application. These are the priorities available to the help desk agent when creating a work order.
SYNC_REQ_WORK_ORDER	Inbound	Subscribe to work order add/update request from help desk. This message enables the help desk agent to add or update work orders. This message creates a work order in PeopleSoft Maintenance Management when the help desk agent invokes the Create Work Order related action on a case. The message updates a work order in PeopleSoft Maintenance Management when the agent changes the contact information on the case.
SYNC_RSP_WORK _ORDER	Outbound	Publish to work order create/update response. This message returns an Add or Update status to the help desk application. If the Add work order is successful, this message returns the new work order number and its initial status. If unsuccessful, this message returns the errors encountered trying to create the work order.
SYNC_WM_WO_KEY_EVENT	Outbound	Publish to key event reporting. Send work order key events to the help desk application. Key events include: work order status change, work order description change, and request for more information from the work order technician.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

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You cannot create a PeopleSoft Maintenance Management express work order from the PeopleSoft CRM Help Desk

Requests for Information

A technician can request more information from the help desk application by email if a valid employee ID or email address for the help desk agent is available on the work order header. The technician accesses the Notes link in either a work order's header or task, enters a new note, indicates that a reply is needed, and sends an email to the contact person (usually the help desk agent) identified in the work order. This email contains an URL that points to a reply page where the help desk's contact person can reply to the information request. When the help desk agent replies, the system automatically sets the note indicator in the technician workbench to *Replied* so that the technician knows that a reply to his request has arrived and is awaiting review. For a work order header note, an email is sent to the scheduler, supervisor, and lead person, indicating a reply was received. For a work order task note, an email is sent additionally to the technician. A technician can clear the Request for Information check box in the work order's Notes page, which cancels the need for a reply to the note. This resets the note indicator in the technician workbench from *Pending* to *Cleared*. If the technician clears the Reply check box, this resets the note indicator from *Replied* to *Cleared*.

Work Order Copy

You select the Copy To New Work Order check box in the User Preferences, PeopleSoft Maintenance Management page for selected users to enable them to copy data from an existing work order to a new work order by clicking the Copy Work Order button. This button is available only when you are updating an existing work order.

When you click the Copy Work Order button in the Work Order page, you can enter a work order ID for the new (target) work order or let the system assign the next work order ID automatically. You can copy both open and closed work orders.

You can also select specific work order data to copy, which can include:

- Task labor requirements.
- Task inventory requirements.
- Task purchased and on-hand requirements.
- Task tools requirements.
- Task labor schedules.

  Selecting this option also copies work order access information.
- Task inventory schedules.
- Task purchased and on-hand schedules.
- Task tools schedules.
- Header notes.
- Task notes.

Note. The options available for selection are dependent upon the setup of the user in User Preferences.

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Note. Scheduled items that you originally created from the direct application of actuals, such as labor and tools items entered from the Technician Workbench and a direct issue of inventory items to the work order, will not be copied to the target work order. Only scheduled resources that a user enters on a work order are copied to the target work order.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

Additional data that is either copied or not copied from the source work order to the target work order includes:

- The work order type, service group, priority, shop ID, asset data, problem, cause, and resolution data, location, the work order description, and chargeback data are copied to the target work order.
- The project activity ID is copied from a work order, which is associated with a Project Costing-managed project, but it is not copied from a work order, which is associated with a work order-managed project.
- The required start date is set to the current date and is valid in accordance with default requirements, for the header, labor, inventory, purchase and on-hand, and tools requirements.

  You can change the required start date for the new work order before it is created.
- The required end date is set to the new required start date plus the difference between the source work order's required start and end dates, and is valid in accordance with default requirements, for the header, labor, inventory, purchase and on-hand, and tools requirements.
- The task statuses are based on how you set them up, which means that they will default to whichever status value is flagged as Initial.

  See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.
- The header status is recalculated based on the task statuses.
- The status audit log is created for both header and task statuses.
- The service request data is not copied to the target work order.
- The labor schedule lines are copied but the labor assignments and their corresponding ChartField distributions are cleared. New Chartfield distributions are created later when the schedule assignments are made.
- The tools schedule lines are copied but the tool assignments and their corresponding ChartField distributions are cleared. New Chartfield distributions are created later when the tool assignments are made.
- The inventory schedule lines are copied together with their corresponding ChartField distributions.
- The purchased and on-hand schedule lines are copied together with their corresponding ChartField distributions.
- The schedule and actual start and end dates and the actual costs are not copied to the target work order. The schedule start and end dates are recalculated and the actual start and end dates and costs are cleared. The actual start and end times are also cleared while the scheduled start and end times are copied as is.

  For example, you can copy a work order with a status of *scheduled* and indicate that you want to copy the labor, inventory, purchased and on-hand, and tools schedules. However, after the copy, the schedule start and end dates convert to the source work order schedule dates plus the difference between the new target work order required start date and the source work order required start date, all actual dates and times are cleared, and all actual costs are cleared.
- The source work order task attachments, instructions, and checklists are copied to the target work order's tasks.
- Work order job and task templates are not copied.

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Creating a Work Order

To create a work order use either the:

- Work Order (WM_WO) component.
- Express Work Order (WM_WO_WR) component.

This section discusses how to:

- Define work order header information.
- Add notes to work orders.
- Create attachments.
- Search for job templates.
- Copy to a new work order

Pages Used To Create a Work Order

Page Name	Object Name	Navigation	Usage
Express Work Order	WM_WO_WR	Maintenance Management, Work Order Management, Express Work Order	Create an very basic work order quickly. See Chapter 14, "Creating a Work Order," Understanding Work Orders, page 363.
Work Order	WM_WO_HDR	Maintenance Management, Work Order Management, Work Order	Identify the key information describing what is to be done with which resources, to which asset, when, why, and how.
Work Order Status History	WM_WOSTATUS_SEC	Click the As of date link on the Work Order page.	Display the status history of the work order, the date that the status was updated, and the user who created a change in the work order that resulted in the work order header status change.
Work Order Approval	WM_WO_APPR	Click the Preview for Approval button in the work order.	Once you submit a work order for approval, click the Approval History link to view the status of the approval process.
Work Order Attachments	WM_WO_ATTACH	• Click the Attachments link on the Work Order page. • Click the Attachments link on the Requirements page. • Click the Attachments link on the Schedules page.	Attach a document to a work order or work order task.

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Page Name	Object Name	Navigation	Usage
Work Order Supplemental Data	WM_WOHDR_SD_SEC	• Click the Supplemental Data link on the Work Order page. • Click the Supplemental Data link on the Requirements page. • Click the Supplemental Data link on the Schedules page.	Enter values for supplemental data fields that the organization has created for use on work orders.
Notes	WM_WO_NOTES	Click the Notes link on the Work Order page.	Add notes about the work order.
Notes	WM_TSK_NOTES	• Click the Notes link on the Requirements page. • Click the Notes link on the Schedules page.	Add notes about the work order task.
Work Order History for Asset	WM_ASSETWO_SEC	• Click the Work Order History link on the Work Order page. • Click the Work Order History link on the Requirements page. • Click the Work Order History link on the Schedules page.	View a history of the work order created, completed, and closed for the specified asset.
Asset Information	WM_WO_ASSET_SEC	Click the Asset Details link on the Work Order page.	Displays detailed asset information such as the asset type, asset subtype, manufacturer ID, and model.
Maintenance History by Type	ASSET_MAINT_SUM_01	• Click the Asset Maint. History link on the Work Order page. • Click the Asset Maint. History link on the Requirements page. • Click the Asset Maint. History link on the Schedules page. • Asset Management, Service and Maintenance, Review Maintenance History • Maintenance Management, Inquiries, Asset Maintenance History	View the asset maintenance history based on the type of maintenance performed on the asset.

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Page Name	Object Name	Navigation	Usage
Asset Warranties	ASSET_WARRANTY	• Click theActive Asset Warranties icon on the Work Order page. • Click the Asset Warranties icon on the Requirements page. • Click the Asset Warranties icon on the Schedules page. • Asset Management, Service and Maintenance, Asset Warranties	Display the asset warranties associated with an asset specified in the work order. If a warranty does not exist, users with update access to the page can create an asset warranty for this asset, using a warranty template if desired.
Search for Asset Warranty Templates	AM_WTMPL_SRH	Click the Apply Warranties from Template link on the Asset Warranties page.	Search and select an asset warranty template to apply to the Asset Warranties page to create a new warranty for an asset.
Job Template Search	WM_JRL_JT_SRCH_SEC	Maintenance Management, Work Order Management, Work Order Click the Job Templates link.	Search for a job template to associate with this work order.
Personal Data	WM_PERSON_DATA_SEC	• Click a selected supervisor or contact name link on the Work Order page. • Click a selected supervisor or contact name link on the Requirements page. • Click a selected supervisor or contact name link on the Miscellaneous page.	Enables a user to view a selected employee's contact information.
Scheduler Information	WM_SCHEDULER_SEC	• Click a selected scheduler's name link on the Work Order page. • Click a selected scheduler's name link on the Requirements page. • Click a selected scheduler's name link on the Miscellaneous page.	Enables a user to view the selected scheduler's shop, employee ID, and shift information.
Copy Work Order	WM_WO_COPY_SEC	Click the Copy to New Work Order button on the Work Order page.	Copy existing work order data to a new work order.

Defining Work Order Header Information

Access the Work Order page.

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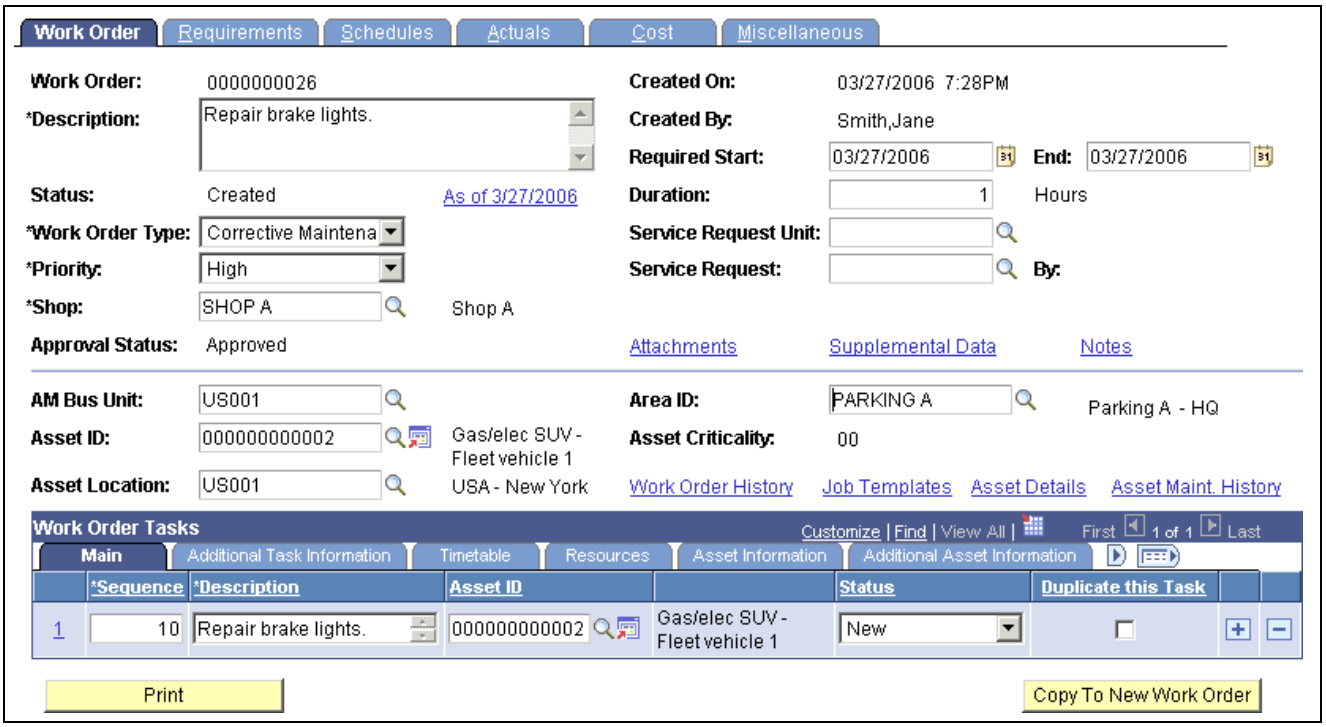

Work Order page

Work Order — If the selected business unit indicates auto-numbering, then the system assigns the *NEXT* number after the last Work Order ID created. If auto-numbering is not selected for the business unit, you can enter a number manually.

Created On and **Created By** — Once a new work order is saved, these fields display the date and time that the work order was created and the name of the user who created the work order.

Required Start and **End** — Select the date that you want this work order to start and end. The current system date appears as the default date in these fields, which you can override.

Status — Identifies the overall work order status. The work order status reflects the most outstanding status of the work order task statuses. You cannot directly change this work order header status.

As of mm/dd/yyyy (as of month/day/year) — Click this link to access the Work Order Status History page, which describes the status of the work order, the date it was updated, and the name of the person who updated it.

Duration — Enter the number of hours needed to complete the entire work order. This field is informational only. However, the value entered in this field can be exported to Microsoft Project.

Work Order Type — Displays the default value from the value entered on the Work Order - Add a New Work Order page. This is the tentative user-defined value for the type of work order you are creating. Typical work order types could be: CORR (corrective maintenance), Capital (capital), and PM (preventive maintenance). You can override this value.

Note. You cannot change this work order type value after scheduling resources for a task.

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Service Request Unit

Click to select a service request business unit to enable you to associate a service request with this work order. This field may already contain a value if:

- This work order was created from a service request. The business unit value from that service request displays here.
- The service request was created from an application, such as a help desk application, that is external to PeopleSoft Maintenance Management. This information is display-only.

Priority

Displays the default value from the value entered on the Work Order - Add a New Work Order page. This is the tentative level of urgency for this work order.

Note. You can override this value.

Service Request and **By**

Select or enter a service request number. The By field contains the name of the person entered in the Requested By field in the service request. This could be the name of the agent or the original requester, depending who entered the service request. This person is automatically notified when a work order is completed or cancelled.

Shop

Displays the default value from the value entered on the Work Order - Add a New Work Order page. This is the tentative primary shop. You can override this field.

Note. You cannot change this shop value after scheduling resources for a work order task.

PM Schedule ID (preventive maintenance schedule ID)

Identifies the preventive maintenance schedule, which was used to generate this preventive maintenance work order. If this is not a preventive maintenance work order, this field does not display.

Approval Status

If the work order business unit, shop definition, or work order type indicate that this is a pre-approved work order, the defaulting approval status is *Approved*. However, if the work order business unit, shop definition, or work order type indicate that this work order must be approved, then the value in this field is determined by the current status of the approval process, which includes:

- *Initial.*
- *Pending Approval.*
- *Approved.*
- *Denied.*
- *Canceled.*

Note. If work order header status is canceled, work order approval is not invoked.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," page 139.

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Approval History Click this link, which displays after you run the Approval process for this work order, to access the Work Order Approval page, which displays the steps in the approval process.

Attachments Click this link to access the Work Order Attachments page.

Supplemental Data Click this link to access the supplemental data that you set up for the work order header. The contents that display in this page are entirely dependent on how you set up the supplemental data. You set up supplemental data to extend the information stored for an object without modifying that object's base record (table). Objects, include records, pages, and components, which must be specifically configured to accept supplemental data.

Notes Click this link to access the Work Order Notes page.

Approval Preview and Submit for Approval

Click the Approval Preview button and the Submit for Approval button to access the Work Order Approval page.

See Chapter 15, "Approving Work Orders," Understanding the Work Order Approval Process, page 407.

Asset Information

This asset information is applicable to the entire work order and is optional.

AM Business Unit (Asset Management business unit) Select the business unit associated with the asset to be worked on based on this work order. If a default asset business unit value displays in the field, it is derived from user preferences.

Area ID Select the specific area in which this asset is located. This value is set up in the PeopleSoft Asset Management asset repository.

Asset Criticality Identifies how critical this asset is to the organization. This value comes from the PeopleSoft Asset Management asset repository.

Asset ID The field name displayed is based on the set up in the work order business unit. The field's name could be Asset ID, Tag Number, Serial ID, or VIN (vehicle identification number).

Click this button to access any warranties in PeopleSoft Asset Management that apply to this asset. Indicates that there are warranties associated with the selected asset.

Indicates that this is a hazardous asset. This icon is informational only. The asset is defined as a hazardous waste asset in PeopleSoft Asset Management.

Asset Location Select the current location of the selected asset.

Important! When you enter the asset business unit and ID, the default location is derived from the asset repository. However, you can change the location to indicate that the asset is currently in a different location. For this reason the location is not validated against the asset when the work order is saved.

View Work History Click this link to view the Work Order History for Asset page. This page lists the work orders, their descriptions, statuses, and required, completed, and closed dates that were created for this asset.

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Asset Details	Click this link to view the Asset Information page, which provides additional details about the asset such as the asset type, asset subtype, manufacturer ID, and model.
Asset Maint. History asset maintenance history	Click this link to access a second window to review the Review Maintenance History component in PeopleSoft Asset Management, which enables you to view the Maintenance History by Type page. This page enables you to view the description of the maintenance, the date and time of the maintenance events, the technician who performed the maintenance, the cost of the maintenance, the work order business unit, work order ID, and task ID.
Job Templates	Click this link to access the Job Template Search page, which enables you to search for a job template to apply to the work order.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," page 13 and Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Defaults and Default Hierarchies, page 83.

See Chapter 13, "Creating a Service Request," Understanding Service Request Creation and Use, page 347.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Establishing Work Order Priority Codes, page 112.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.

See Chapter 10, "Configuring Work Order Approval Workflow," Understanding the Work Order Approval Workflow Architecture, page 251.

See Chapter 15, "Approving Work Orders," Understanding the Work Order Approval Process, page 407.

See Chapter 14, "Creating a Work Order," Creating Attachments, page 389.

See Chapter 24, "Using Supplemental Data," Understanding Supplemental Data, page 653.

Work Order Tasks

When a work order is created, one task is automatically created. This grid displays all the tasks and their details associated with this work order. If you copy a job template to a work order, the tasks copied from the template are listed here. You can add a task to this grid by adding a new row, however, you can access the Requirements page to define resources for each task, and access the Schedules page to schedule the resources for the task.

Note. Typically, if you are going to define resource requirements for one or more tasks, you set up the task and define the requirements on the Requirements page. If you are not going to define requirements, you can set up one or more tasks on the Schedules page and schedule the resources. You can also add tasks from the Actuals page. If the work order requires approval, the Schedules and Actuals tabs do not display.

The fields used to create a work order task, which appear on the tabs of this Work Order Tasks grid, are defined in detail in the section Creating Work Order tasks. The fields used to define labor, inventory, purchase/on-hand, and tool resources are described in detail in the Defining Work Order Task Requirements chapter.

See Chapter 17, "Defining Work Order Task Requirements," page 425.

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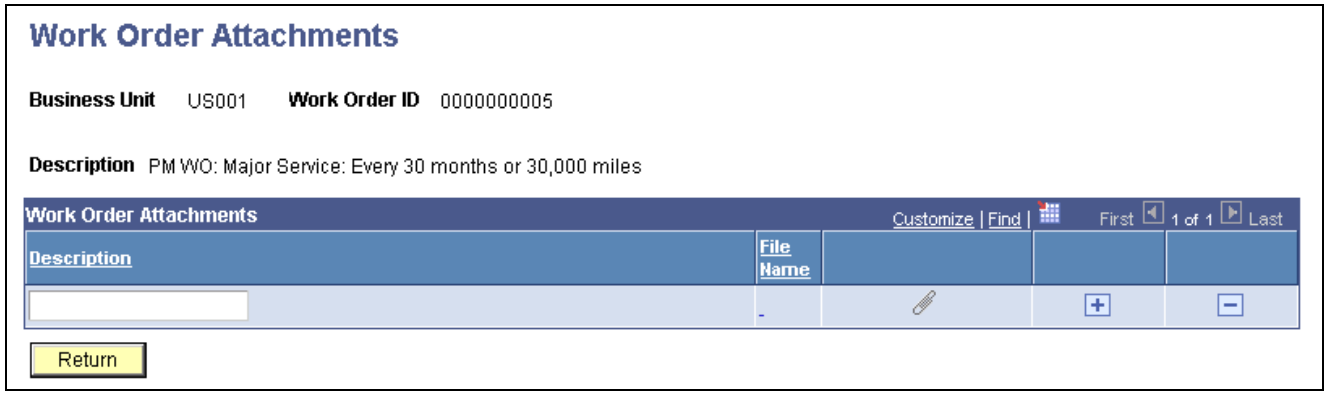
See Chapter 14, "Creating a Work Order," Pages Used To Create Work Order Tasks, page 393.

Creating Attachments

Access the Work Order Attachments page.



Work Order Attachments page

Description Enter a brief description of each attachment.

Click this icon to enable you to search for an attachment such as a drawing, diagram, or other type of document that is needed for the construction, service, or repair of the selected asset.

Adding Notes to Work Orders

Access the Work Order Notes page.

Work Order Notes page

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New Note

Enter a subject for the note and then the note. Click the Save button to save the note.

The check boxes on the left of the notes are used for selecting which notes are sent when you click the Send to Scheduler button on the page. The note is available in the Work Order Workbench for the scheduler identified in the work order.

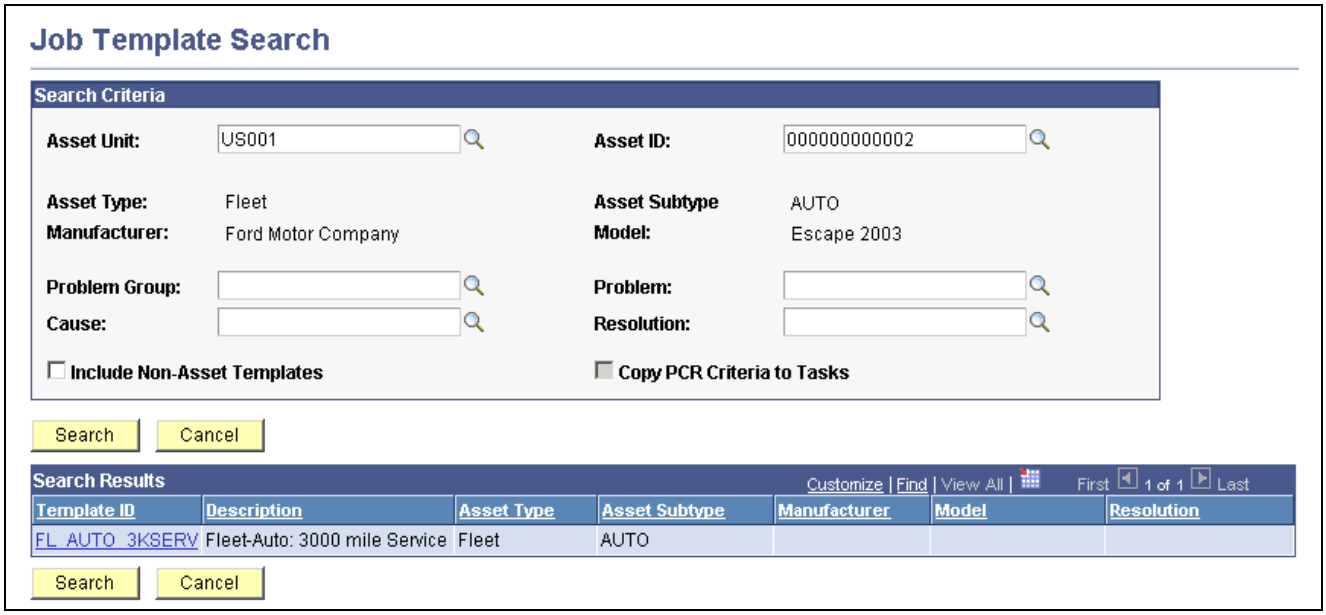
Note. You must set up an email address in the selected scheduler's user profile for the Send to Scheduler button to display on the page.

Notes Contents

When you save a note, it displays the note in the Note Contents group box, along with the date and time the note was entered, and by whom. As notes are added, this enables you to keep track of the note history.

Searching for Job Templates

Access the Job Template Search page.



Job Template Search page

Asset Business Unit Select an asset business unit or a default business unit displays .

Asset ID Displays a field name depending on which of the values that you select for the Asset Lookup Field definition in the work order business unit, which include:

- Asset ID
- Serial ID
- Tag Number
- Vehicle ID Number

Include Non-Asset Templates Select this check box to include job templates that contain tasks that do not directly involve the asset, such as a multi-task operation to clean up and restore the work area.

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Note. If you do not select and Asset Management business unit and an asset in the work order header or task when you access this search page, this check box is automatically selected and only nonasset templates are listed after performing the search.

Copy PCR Criteria to Tasks (copy problem, cause, and resolution criteria to tasks)

Select this check box if you did not specify the problem/cause/resolution (PCR) code values in the fields on the Work Order page, but selected PCR codes instead on the search page to refine your search. You have the option of copying these PCR lookup values back to the work order task lines. When you save the work order, the work order copies the problem, cause, and resolution to each of the task lines created from the selected job template.

Important! When you select a job template to apply to this work order, it copies the associated task template information to the work order tasks. The system only copies task template lines to a work order task line that does not contain any default values or values entered by a user. Usually, once a user enters a task line, a new line is triggered into which the system can copy a task line associated with work order job template.

See Chapter 17, "Defining Work Order Task Requirements," Defining Resource Requirements for a Work Order Task, page 431.

See Chapter 17, "Defining Work Order Task Requirements," Understanding Work Order Task Resource Requirements, page 425.

Copying to a New Work Order

Access the Copy to Work Order page.

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Copy Work Order page

Click the Copy To New Work Order button to access the Copy to Work Order page.

Note. This button displays only if this option is selected for this user in User Preferences.

Work Order ID (new work order number) — Enter a combination of letters and/or numbers for this new work order. Leave this field unchanged if you want the system to generate a new work order number for you.

Required Start Date — Change the date or leave as today's date for the new work order.

Copy Options — To copy one or more of the following values to the new work order, click the corresponding check box for:

- Task Labor Requirements.
- Task Inventory Requirements.
- Task Proc/On Hand Requirements (purchase/on hand requirements).
- Task Tool Requirements.
- Task Labor Schedules.
- Task Proc/On Hand Schedules (purchase/on hand schedules).
- Task Tools Schedules.
- Task Inventory Schedules.

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- Header Notes.
- Task Notes.

Note. The scheduling options do not appear until the work order is approved.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

OK Click this button to access the new work order.

See Chapter 14, "Creating a Work Order," Work Order Copy, page 380.

Creating Work Order Tasks

To create a work order task, use the Work Order (WM_WO) component.

This section discusses how to:

- Create work order tasks.
- Enter asset downtime.
- Set up work order task accounting.

Pages Used To Create Work Order Tasks

Page Name	Object Name	Navigation	Usage
Work Order	WM_WO_HDR	Maintenance Management, Work Order Management, Work Order	Select, enter, or view data in the Work Order Tasks grid.
Requirements	WM_WO_TASK_RQMT	Maintenance Management, Work Order Management, Work Order Select the Requirements tab.	Create and update work order tasks and task requirements.
Task Status History	WM_TASKSTATUS_SEC	Click the As of xx/xx/xxxx date link on the Requirements page.	Review the history of work order task status changes for the selected task.
Work Order Task Accounting	WM_WO_TSK_ACCTG	• Maintenance Management, Work Order Management, Task Accounting • Click the Set Accounts link on the Requirements page.	Set up asset capitalization and chargeback information.
Personal Data	WM_PERSON_DATA_SEC	Click the link associated with a selected supervisor's name or the link associated with a selected contact's name.	Review additional personal information, such as the telephone number, of the selected individual.

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Page Name	Object Name	Navigation	Usage
Scheduler Information	WM_SCHEDULER_SEC	• Click a selected scheduler's name link on the Work Order - Requirements page. • Click a selected scheduler's name link on the Work Order - Miscellaneous page. • Click a selected scheduler's name link on the Work Order page.	View specific information about the scheduler.
Change Shop to Identify Crew	WM_CREW_BUSHOP_SEC	Click the Change Shop for Crew link.	Change the shop for a selected crew.
Work Order History for Asset	WM_ASSETWO_SEC	• Click the Work Order History link on the Work Order page. • Click the Work Order History link on the Requirements page. • Click the Work Order History link on the Schedules page.	View a history of the work order created, completed, and closed for the specified asset.
Maintenance History by Type	ASSET_MAINT_SUM_01	• Click the Asset Maint. History link on the Work Order page. • Click the Asset Maint. History link on the Requirements page. • Click the Asset Maint. History link on the Schedules page.	Review the maintenance history based on the type of maintenance performed.
Asset Information	WM_WO_ASSET_SEC	• Click the Asset Details link on the Work Order page. • Click the Asset Details link on the Requirements page. • Click the Asset Details link on the Schedules page.	Displays detailed asset information such as the asset type, asset subtype, manufacturer ID, and model.

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Page Name	Object Name	Navigation	Usage
Downtime Entry	WM_WO_DOWNTIME	• Click the Asset Downtime link on the Requirements page of the Work Order component. • Click the Asset Downtime link on the Schedules page of the Work Order component. • Maintenance Management, Work Order Processing, Downtime Entry • Click the Downtime link on the Task Actual Dates/Time tab of the Work Order Tasks grid in the Technician Workbench	Enter the start and end dates and times that the asset will be unavailable for use.
Asset Calendar	RS_ASSET_MONTH	Maintenance Management, Work Order Management, Work Order. Click the Asset Calendar link in the Work Order Tasks - Asset Information grid.	Access and review the Asset Calendar. **Note.** This link displays only if you select an asset for the task. See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.
Task Details	RS_SCHED_APPT	Click the day link in the Asset Calendar.	Review the task details for an asset on a specific day. See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.
Asset Daily Schedule	RS_ASSET_DAILY	Click the Return to Asset Daily Schedule link on the Task Details page.	Displays the asset's schedule per day hour by hour. See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.
Task Template Search	WM_JRL_TT_SRCH_SEC	• Click the Task Templates link on the Work Order - Requirements page. • Click the Task Templates link on the Work Order - Schedules page.	Search for a work order task template to copy to the work order.

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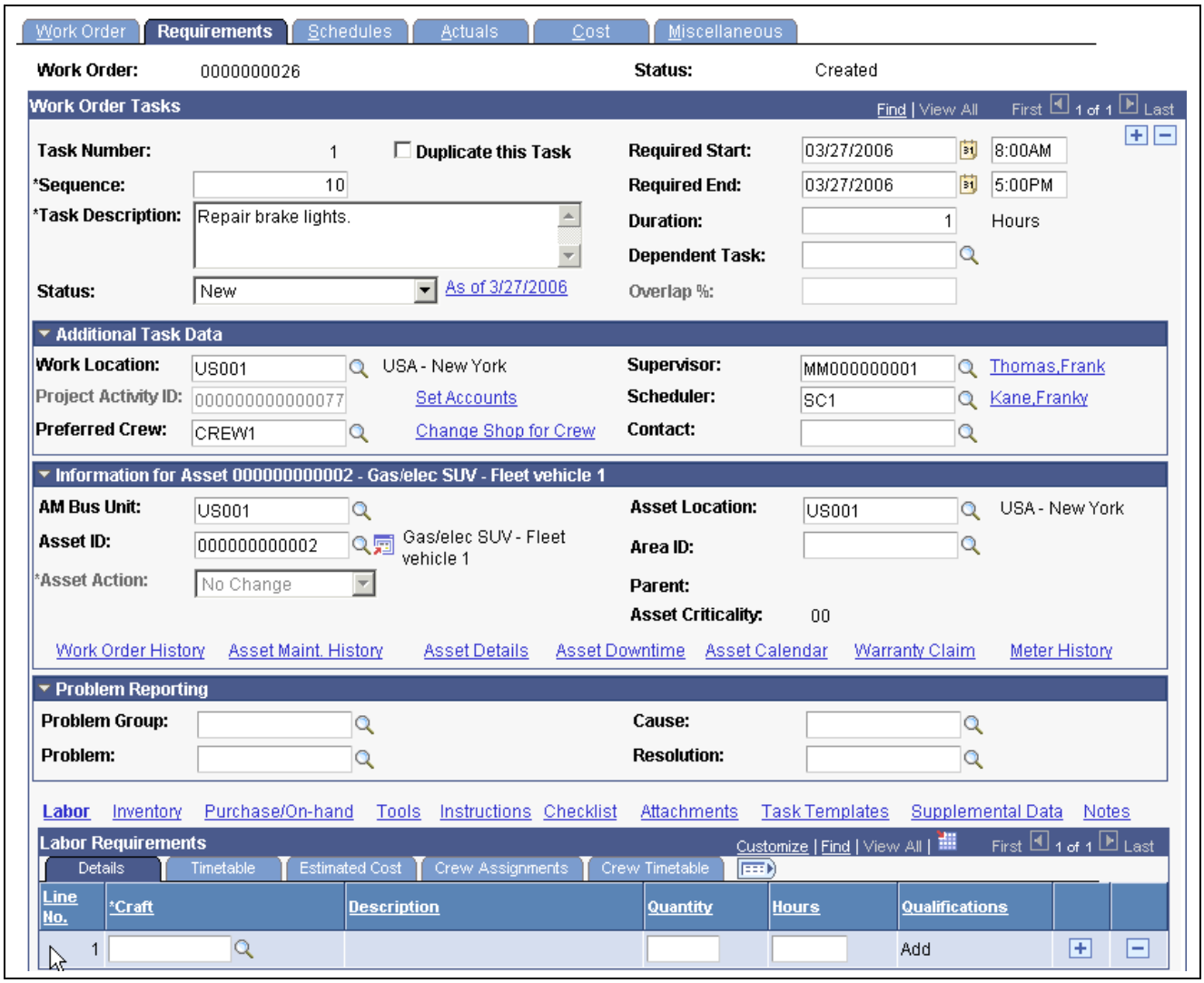
Page Name	Object Name	Navigation	Usage
Task Cost Recovery	WM_WO_TSK_CLAIM	Maintenance Management, Work Order Management, Work Order. Click the Warranty Claim link in the Work Order Tasks - Asset Information grid.	Enter warranty claim information to begin the process of attempting to recover costs from a vendor based on an asset's warranty.
Meter Reading History	AM_MTR_RD_HIS	• Click the Meter History link on the Requirements page. • Click the Meter History link on the Schedules page.	Review the meter reading history of the meter associated with the selected asset.

Creating Work Order Tasks

Access the Requirements page.



Requirements page

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Task Number The system generates a number for each task.

Duplicate this Task Select the check box and then click the plus sign in the upper right corner of the Work Order Tasks group box to create a copy of this task.

Note. You can also click the plus sign in the upper right corner of the Work Order Tasks group box to insert another blank task. You can create as many tasks as needed using this method. You can click the minus sign in the upper right corner of the Work Order Tasks group box to delete a task.

Sequence Enter the number that represents the numerical order within the work order in which to complete this task.

Required Start and **Required End** Select the start and end dates and times. The default start and end date values are derived from the work order header. You can override this information.

Task Description Enter a brief description of this task. This field is required.

Duration Enter the total number of hours the task will take to complete.

Dependent Task Select the task that must be performed before this task can be started for work orders associated with more than one task.

Status Select the user-defined status for this task based on the statuses in the list. The work order task status values are user defined and correspond to system-defined internal statuses. The values that display in this list are determined by the allowable status transitions that are set up when you set up the work order task statues. Workflow approval also affects the statuses that you can choose from. For example, if workflow approval is required (based on the business unit, work order type, or shop setup), then only the *Open, Canceled* and *On Hold* statuses are available until the work order task is approved. Tables that define the behavior of each status are defined in the Setting Up Service Request and Work Order Statuses chapter.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," page 139.

See Chapter 21, "Executing and Completing Work Orders," Understanding Work Order Execution, page 595.

As of mm/dd/yyyy Click this link to access the Task Status History page, which lists the changes in status for this task as of the date specified in this link.

Overlap % (overlap percentage) Enter the percentage that this task overlaps with the dependent task. You can load this information into Microsoft Project.

See Chapter 18, "Scheduling a Work Order," page 443.

Additional Task Information

The Additional Task Information group box contains these fields:

Work Location Select the location where this work order task will be performed. If a default value displays in this field, it is based on a rule that specifies whether to derive this default value from the asset, the shop, or another location. If the latter is selected, then this field is blank.

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Supervisor Select the employee ID and name of the supervisor assigned to this task.

The name of the supervisor appears as a link on the page. When you click this link, the Personal Data page for the selected supervisor displays, which contains the individual's contact information.

Project Activity ID Select an activity if this work order is associated with a Project Costing-managed project. A default activity ID value automatically displays when the work order is saved if this work order is associated with a work order-managed project.

Set Accounts Click this link to access the Work Order Task Accounting page.

Scheduler Select the scheduler code. The name of the selected scheduler appears on the page as a link. When you click this link, the Scheduler's Information page displays information about the scheduler, such as the scheduler's employee ID and shift.

Schedulers are set up in the shop based on a scheduler code instead of an employee ID. Schedulers in many shops move from one role to another. By setting up a scheduler by a scheduler code in the shop, you only have to change the employee associated with a scheduler code, rather than having to change the employee ID for the scheduler in every work order task.

Preferred Crew Displays the primary crew identified in the shop associated with the work order or with the task's asset ID. This value is used in the Crew Scheduling Workbench as part of the search criteria when searching for unscheduled requirements.

Note. This field and the Change Shop for Crew link only display when the shop associated with the work order performs crew scheduling.

See Chapter 19, "Performing Crew Scheduling," page 523.

Change Shop for Crew Click this link to access the Change Shop to Identify Crew page, where you can select a shop different from the primary shop in the work order to associate with a selected crew. The crew and its resources must be set up in the selected shop.

Contact Select the user ID of the person to contact concerning this work order. The name of the contact appears as a link on the page. When you click this link, the Personal Data page displays with additional information about the selected contact.

Task Asset Information

If you identify an asset in the work order header, it can apply to all the work order tasks. However, you can also identify different assets for each work order task. To use more than one asset in a work order, you must select the Multiple Assets Per Work Order option in the work order business unit. If you do not select this option, the asset fields for a task are not available for selection and the tasks use the asset selected in the work order header.

Note. The principles of selecting an asset for a task are the same as selecting an asset in the work order header.

AM Bus Unit (Asset Management business unit) The default value is derived from the User Preferences, Maintenance Management page.

Asset Location Select the current location of the selected asset.

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Important! When you enter the asset business unit and ID, the default location is derived from the asset repository. However, you can change the location to indicate that the asset is currently in a different location. For this reason the location is not validated against the asset when the work order is saved.

Asset ID (Serial ID, Tag Number, Vehicle ID Number)

Select a value to more specifically identify the asset.

The field name that appears on the page depends on the field name (Asset ID, Serial ID, Tag Number, or Vehicle ID Number) that you select in the work order business unit that was used to create the work order.

Area ID

Select the specific area in which the asset is located.

Asset Action

Select one of these actions to affect this task's asset:

Note. This option only appears on the page if the work order type for capital work orders and is used primarily for the retirement and removal of assets and component changeouts.

- *Install*
- *No Change*
- *Remove*
- *Retire*

  If you select *Retire* and this is a Project Costing managed work order with the Asset Integration Rules set to Capitalize, PeopleSoft Maintenance Management allows this asset action to proceed with no edit. However, PeopleSoft Project Costing will ignore the Retire setting.

Note. You must select *No Change* for non-financial assets. All other values involve the installation, removal, or retirement of a financial asset.

Parent Component

Displays the parent component of this asset, if it is part of another component. For example, the selected asset for this task is part of a component that consists of two or more assets, such as a truck's engine and all of the parts (assets) that compose the engine (parent component).

Work Order History

Click this link to access the Work Order History page for this asset. This page lists the work orders and tasks that are associated with this asset, along with the start and end dates and when they were completed and closed.

Asset Maint. History asset maintenance history

Click this link to access the Review Maintenance History component in PeopleSoft Asset Management.

Asset Details

Click this link to access the Asset Information page, which lists details about this asset, such as the asset characteristics, asset ID and more.

Asset Downtime

Click this link to access the Downtime Entry page.

See Chapter 14, "Creating a Work Order," Entering Asset Downtime, page 401.

Asset Calendar

Click this link to access the Asset Monthly Schedule for this asset. You can drill down to the daily schedule and add task details. This schedule indicates when the asset is available for maintenance or repair.

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Click this button to access the Asset Warranties page in PeopleSoft Asset Management and view any warranties associated with this asset.

Displays this icon when the asset is hazardous.

Warranty Claim Click this link to access the Task Cost Recovery page, which enables you to create a warranty claim.

Meter History Click this link to access the Meter Reading History component in PeopleSoft Asset Management.

See *PeopleSoft Enterprise Asset Management 9.0 PeopleBook*, "Adjusting, Transferring, and Evaluating Assets".

Problem, Cause, and Resolution Data

You can optionally associate a problem group, problem, cause, and resolution with a work order task. Specifying these values enable you to search for a work order job or task template, which already has requirements defined for this type of problem. In addition, specifying these values enables you to categorize this task in order to later search for this task or other work orders and tasks associated with the PCR data specified for this task.

Problem Group, Problem, Cause, and**Resolution** Select a problem group that applies to the work being performed by this task. Then select a problem, cause, and resolution that are appropriate for this task based on your diagnosis of the situation. To perform a search based on PCR data, you must specify, at a minimum, the Problem Group, Problem, and Cause. You can then select from templates associated with resolution codes that match this criteria. In addition, by entering PCR criteria, you restrict your search to only those templates that are associated with resolution codes. If you select Include Non-Asset Templateson the Task Template Search page when you click either the Job or the Task Templates link, then Non-Asset Templates are included in the search for resolutions.

See Chapter 9, "Defining Work Order Templates," Understanding Work Order Templates, page 239 and Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," Understanding PCR Setup and Tracking, page 125.

Resource Requirement and Associated Task Data Links

Click the Labor, Inventory, Purchase/On-Hand, and Tools links to set up resource requirements for a work order task. This is described in detail in the Defining Work Order Task Requirements chapter.

See Chapter 17, "Defining Work Order Task Requirements," Defining Resource Requirements for a Work Order Task, page 431.

Labor Click this link to access the Labor Requirements grid.

Inventory Click this link to access the Inventory Requirements grid.

Note. This link does not display if you have not installed PeopleSoft Inventory.

Purchase/On Hand Click this link to access the Purchase/On Hand Requirements grid.

Tools Click this link to access the Tool Requirements grid.

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Instructions Click this link to display a Task Instructions group box. Enter the step number for the instruction, then enter the instruction, and click the plus sign in the upper right corner to add another instruction. You can add as many instructions as you want. Click the minus sign in the upper right corner to delete an instruction.

Checklist Click this link to display a Checklist group box. This checklist is for tasks that should be done either before a work order task is started, or after a work order task is completed.

- Step

  Enter the step number for this checklist item.

- Type

  Select whether this step is performed before the task begins or after the task is completed.

  - *Before task*
  - *After task*

- Required

  Select this check box if this is a required step. Leave it blank if the step is optional. For those marked as *Required*, the technician must mark the item as complete in the Technician Workbench and the system stamps the date and time next to the checklist item along with the technician's name. Optionally, the Completed by, date and time can all be manually updated in the Technician Workbench. Additionally, for Before Task checklist steps, the technician must mark it as complete in the Technician Workbench before the work order task status can advance to or past a system internal status of *work in process*. For After Task checklist required steps, the technician must mark them as complete in the Technician Workbench before the work order task can be set to a system internal status of *complete*.

Note. Use the plus and minus buttons to add or delete steps.

Attachments Click this link to access attachments that pertain to the work order task, such as drawings, schemas, and more.

Task Templates Click this link to access the Task Template Search page. This search page has the same fields as the Job Template Search page. When you select a task template, the requirements are copied into a work order task along with other task information.

Supplemental Data Click this link to access supplemental data set up for this task.

Notes Click this link to add notes to the work order task. You can send notes to the scheduler.

Entering Asset Downtime

Access the Downtime Entry page.

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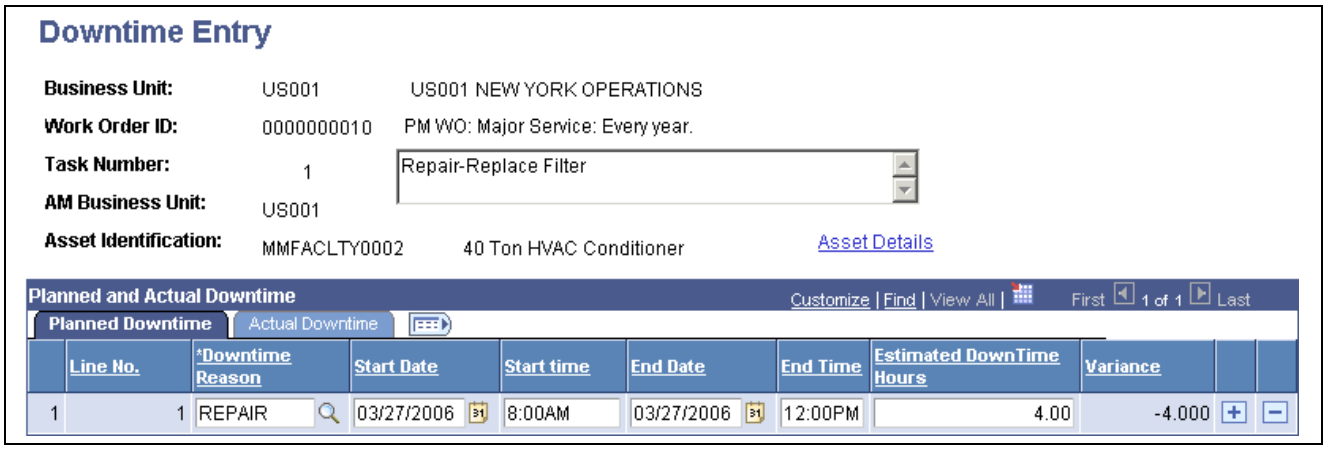

Downtime Entry page

The Downtime Entry page header information is derived from the asset description in the work order task.

Planned Downtime

Select a reason for the downtime and then select the proposed start and end downtime dates and times, and enter the number of yours that you think the asset will be down. When you save the page, the variance field initially displays the hours of proposed downtime.

Actual Downtime

You can modify the Downtime Reason if necessary. Enter the actual dates and times that the asset was down and the number of hours that it was down. When you save the page, the variance on the Planned Downtime tab displays any difference. For example, if you planned for the asset to be down for repair for 4 hours and it only took two hours to repair it, then the Variance field will display *– 2.000*.

Setting Up Work Order Task Accounting

Click the Set Accounts link on the Requirements page to access the Work Order Task Accounting page.

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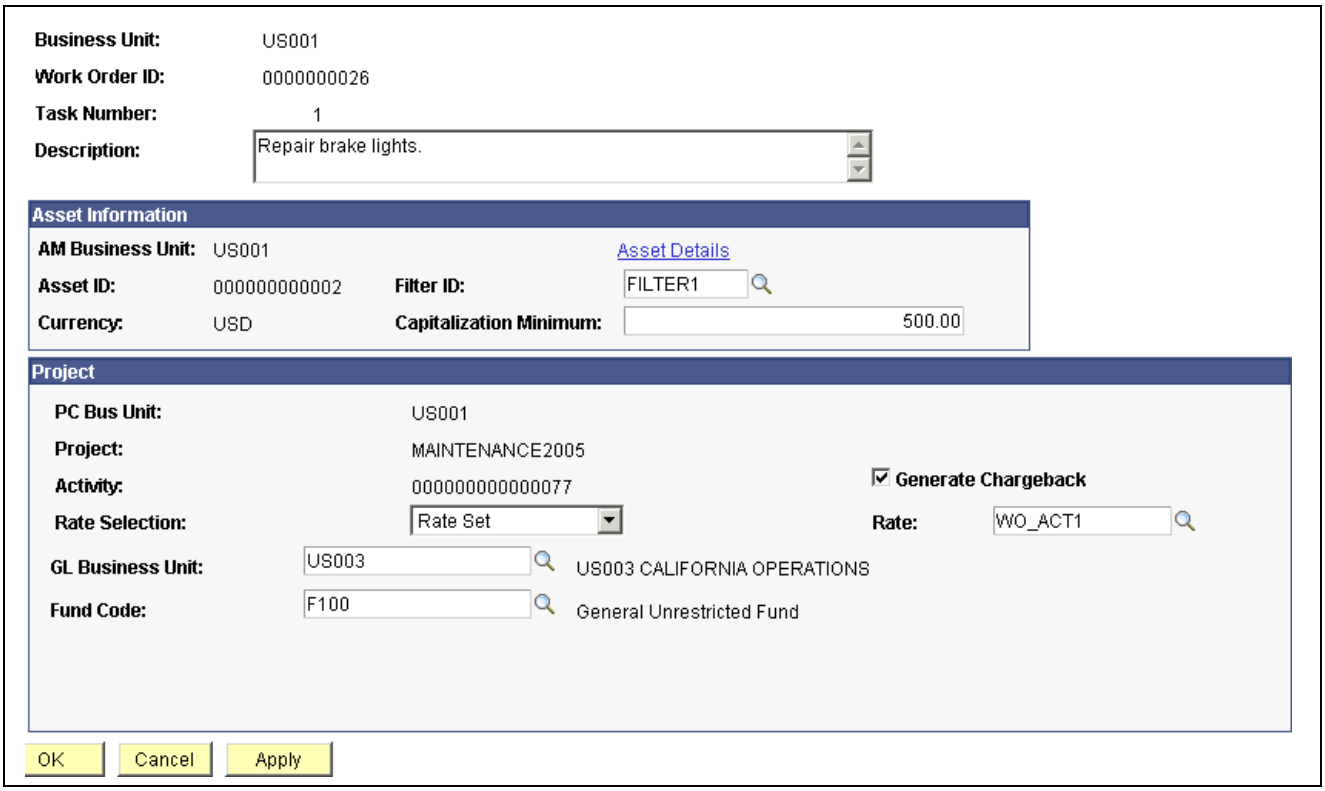

Work Order — Task Accounting page

Asset Information

AM Business Unit Asset Management business unit
The default value is derived from the business unit set up in the User Preferences, Maintenance Management page.

Asset ID
This value only displays if you select an asset in the work order header or in the work order task.

Filter ID
Select the an express asset filter ID. These filters are set up in the Set Up Financials/ Supply Chain, Product Related, Project Costing, General Options, Express Asset Filter Criteria. Filters specify in PeopleSoft Project Costing which transaction costs are allowed to make up the cost basis of the asset. The delivered sample data filters are “Filter 1” and “Filter 2”. Filter 1 identifies that Material and Labor actuals should be considered for capitalization, and Filter 2 identifies that only Labor actuals should be considered.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , “Managing Assets,” Filtering Asset Transactions for Express Capitalization.

Currency
The currency value is derived from the primary book of the Asset Management business unit.

Capitalization Minimum
Enter the minimum cost for maintaining or repairing the asset associated with this work order task that must be reached before the costs are capitalized by PeopleSoft Project Costing.

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Project

PC Bus Unit This default value comes from the Project Costing business unit set up in the work order business unit's Integration page.

Project and **Activity** These values are based on the project and activity associated with the work order and work order task.

Rate Selection Select *Rate Set* or *Rate Plan*, which are set up in PeopleSoft Project Costing. The default value in this field is set up on the work order business unit's Integration page. Rate sets and rate plans work in conjunction with chargeback to a calculate premium or discount to chargeback based on work performed.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Integration Options, page 88.

Rate Select the user-defined rate based on whether you selected *Rate Set* or *Rate Plan* for the Rate Selection field.

Generate Chargeback Select this check box to enable PeopleSoft Project Costing to calculate chargeback amounts for this work order task based on the selected rate set. When you select this check box, the following field display for you to enter the accounting information necessary to complete the chargeback in PeopleSoft Project Costing.

Note. To enable this check box, you must select the Enable Organization check box on the Installation Options - Project Costing page. You must complete any of these fields that display on the page if you want chargeback processing to occur in PeopleSoft Project Costing for this work order task. The fields that display are determined by the set up of the General Options - Organization Hierarchy for PeopleSoft Project Costing product-related setup.

GL Business Unit Select the GL Business Unit to associate with this chargeback. This field appears if you select the Generate Chargeback check box.

Department Select a department to which these work order task costs should apply depending on your organization's setup.

Fund Code Select a fund code to which these work order task costs should apply depending on your organization's setup.

Activity Select the project activity to which these work order task costs should apply.

Product Select the product to which these work order task costs should apply, if applicable.

Using the Work Order - Miscellaneous Page

This section describes how to use the Work Order - Miscellaneous page.

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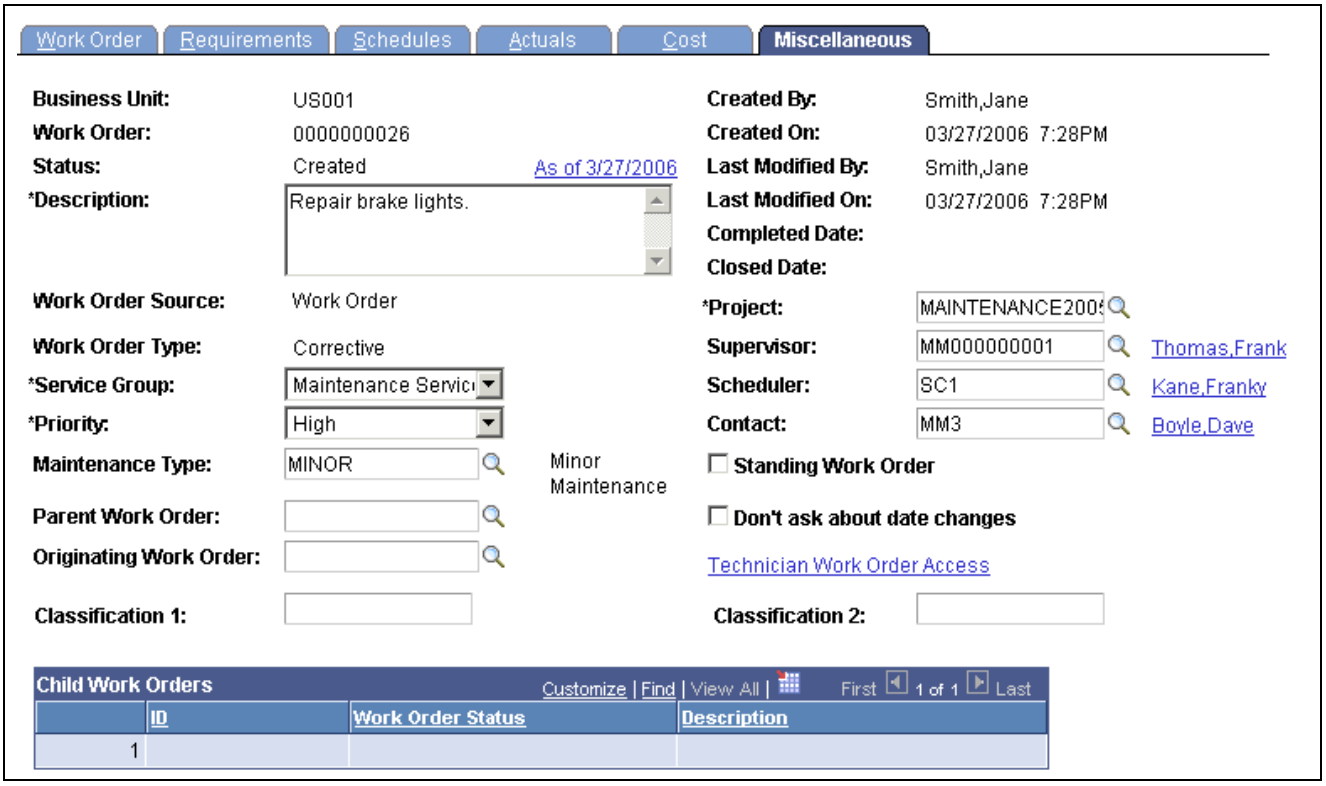
Page Used to Use the Work Order - Miscellaneous Page

Page Name	Object Name	Navigation	Usage
Work Order - Miscellaneous	WM_WO_DETAIL	Maintenance Management, Work Order Management, Work Order Select the Miscellaneous tab.	Review work order header information and enter additional information.

Using the Work Order - Miscellaneous Page

Access the Work Order - Miscellaneous page.



Work Order — Miscellaneous page

Most of the information in the top half of this page comes from the work order header. However, you can enter a description and select or override the supervisor, scheduler, and contact in this page.

Project

Override the default project, if necessary. The default project ID is derived from calculations based on the setup of the Associate Projects component and the Project Default Order set up in the work order business unit.

Note. If this is a Project Costing-managed project, the Project ID of the project from which you created the work order displays in this field.

Maintenance Type

Displays a default maintenance type value that is derived from the work order business unit. You can override this value when you add a new work order.

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Important! This is a required field if you selected assets for each work order task. You must select the Maintenance Type to enable the Work Order Close batch process to close the task.

Standing Work Order Select this check box if you want this work order to be a standing work order. Standing work orders do not automatically close upon completion of the last open task. Clear this check box to enable a standing work order to close.

Parent Work Order Select another work order as the parent of this work order, if you want this work order to be the child of another work order.

Don't ask about date changes Select this check box if you do not want the system to issue a message asking you if you want to override corresponding dates on lower levels when you change a required date in the work order header or task and a schedule date in the task. Selecting this check box enables you to proceed with changes to the above dates without the message displaying.

Originating Work Order Select the work order that this work order originated from. For example, if a work order is closed and there is still work pending, you can create a new work order and indicate that it originated from the closed work order.

Technician Work Order Access Click this link to access the Work Order Access page. You can add any shops to enable resources in that shop access to the work order's tasks in the Technician Workbench, or access to update the work order in Express Work Order. You can also authorize specific resources to have this privilege by selecting the Allow Access to WO Security check box in the User Preferences-Maintenance Management page. The primary shop in the work order automatically displays on this page, as do any shops specified for labor resources in the work order tasks.

Child Work Orders If one or more work orders indicate that they are children of this work order, then these child work orders are listed here in this grid.

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CHAPTER 15

Approving Work Orders

This chapter provides an overview and prerequisites of the work order approval process in Oracle's PeopleSoft Enterprise PeopleSoft Maintenance Management and discusses how to administer work order approvals.

Understanding the Work Order Approval Process

Work order approval workflow is used to enforce the business rules of an organization's maintenance operations to ensure that all work orders are within budget and have proper authorization.

For example, ABC organization has the following business requirements for its work order business unit:

- The designated capital work order approver must approve any capital work order.
- The shop supervisor must approve any non-emergency corrective work order with an estimated cost of more than $5000.
- A company director must approve any non-emergency corrective work order with an estimated cost of more than $10,000.

A maintenance supervisor or a business analyst in ABC sets up workflow approval rules in the system. When users create work orders for a specific work order business unit, the system checks them against these rules.

The Work Order component enables a user to submit a work order for approval depending upon whether the work order's business unit, shop, or work order type indicates either that a work order:

- Is preapproved.
- Requires approval.

The requirements for approving a work order are entirely dependent upon the way your organization defines its approval rules in the Approval Process Definition component.

See Chapter 10, "Configuring Work Order Approval Workflow," page 251.

Work order approval status values are system defined, and change depending on the approval state of the work order, as shown in the following diagram:

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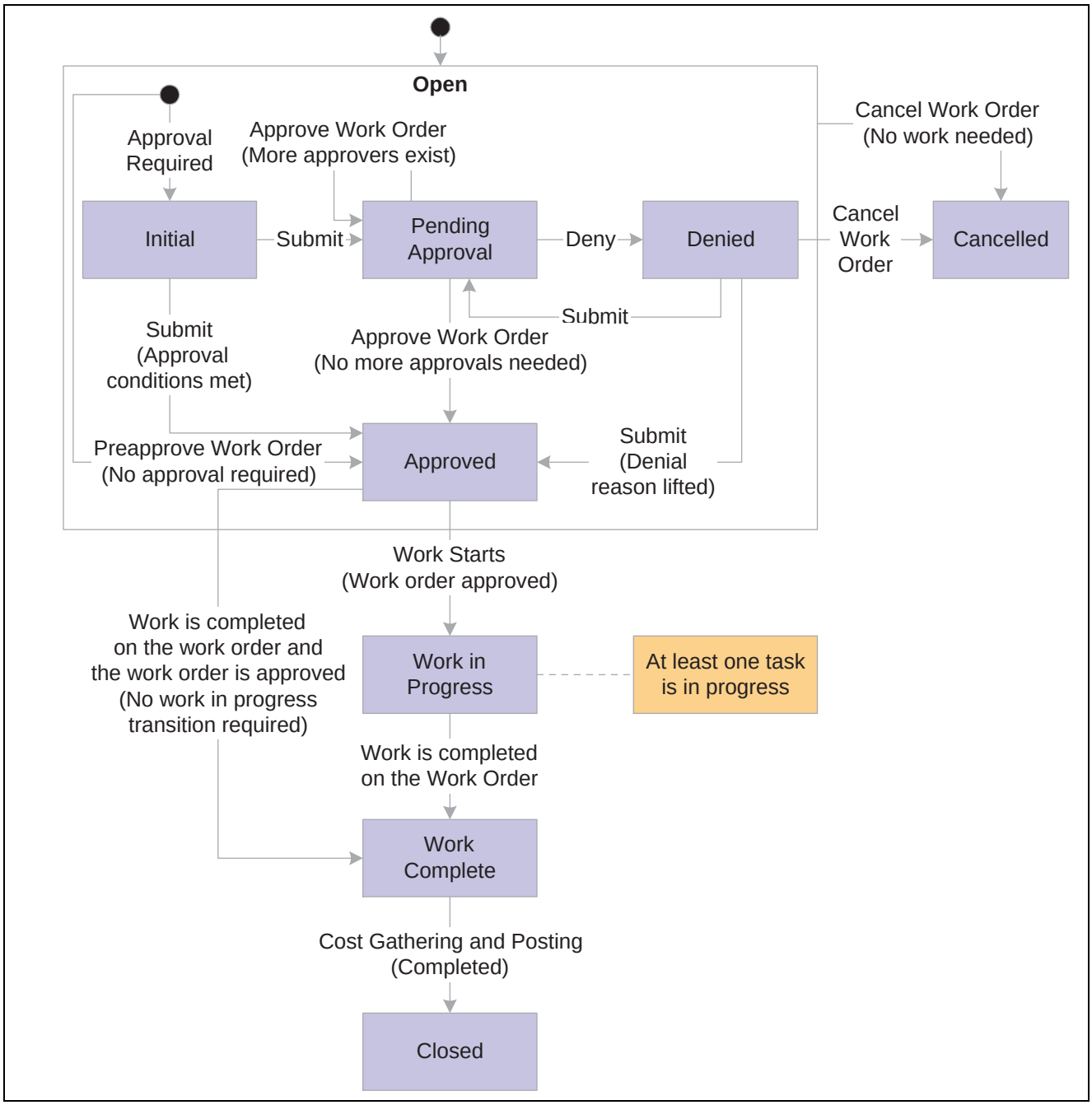

Work order approval status values

To approve a work order:

- If a work order requires approval, the user can click the Preview Approvals button on the Work Order page to access the Work Order Approval page, review the approval process setup, and add approvers if desired.
- The user can click the Submit button on the Work Order Approval page to submit the work order for approval, or access the Work Order page and click Submit for Approval.
- Once a user submits a work order for approval, the approval status of the work order changes from *Initial* to *Pending Approval*.

  The user can click the Approval History button on the Work Order page to view the approval workflow in the Work Order Approval page.

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Note. The user cannot add or modify the approvers at this point.

- The approval process routes the work order to the first approver for approval or denial.
- If this approver approves the work order, the work order is routed to the next approver, depending on how many approvers are set up for this business unit.

  The work order approval status changes to *Approved* after all required approvers have approved the work order.
- If an approver denies the work order, the work order approval process terminates, and the submitter is notified of the denial.
- The submitter optionally can revise the work order and resubmit it for approval.

  When the work order approval status is *Pending Approval* a user can also cancel the approval process, change the work order, and resubmit it.

For example, Joe, an operations manager for ABC Company, submits a corrective work order with an estimated cost of $11,000. Because this estimate is more than $5,000, it requires approval by the shop manager, John Dean. John Dean approves the work order. Because the work order is over $10,000, it is then sent to ABC director Jennifer Lee for approval. If either John Dean or Jennifer Lee rejects the work order, the approval process is terminated.

Depending on the situation, either the submitter or the approvers can add another approver. If for example, Jennifer Lee decides that Asst. VP Steve Shaw should approve the work order, she can add Shaw as an approver. The work order is then sent to Shaw for approval.

The submitter or approver can also add reviewers to the approval process. In that case the system routes the work order to reviewers for their information. A reviewer's decision does not affect the progress of the approval process.

Once a work order is fully approved, the scheduler can then schedule resources to complete the work order.

See Chapter 9, "Defining Work Order Templates," Setting Up a Work Order Job Template, page 247.

Prerequisites

Before you can approve a work order, you must configure the Approval Workflow Engine (AWE).

See Chapter 10, "Configuring Work Order Approval Workflow," page 251.

Administering Work Order Approvals

This section discusses how to:

- Use work order approval options.
- Preview work order approvals.
- Submit work orders for approval.
- Review work order approval history.

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- Manage work order approvals.

Pages Used to Approve a Work Order

Page Name	Object Name	Navigation	Usage
Work Order	WM_WO_HDR	Maintenance Management, Work Order Management, Work Order	Identify the information that controls the work order, and access the pages to preview approvals and review approval history. You can also submit a work order for approval from this page.
Work Order Approval	WM_WO_APPR	• Click the Approval Preview button on the Work Order page. • Click the Approval History link once a work order has been submitted for approval to view the status of the approval process. • Click a work order approval item from your worklist.	Review approval setup and add any additional approvers, if needed, and submit a work order for approval. Review the approval setup once the work order is submitted for approval. This approval history is read only.
Manage Approvals	WM_MANAGE_APPROVAL	Maintenance Management, Work Order Management, Approve Work Order	Search for and manage work orders that require approvals.

Using Work Order Approval Options

Access the Work Order page.

The work order business unit, shop, and work order type determine whether a work order requires approval. Depending on how the default hierarchy is set up for this business unit, one or all of these attributes may indicate that the work order is preapproved, which means that the approval workflow process is not required for this work order. If one of these attributes indicates, depending on the hierarchy, that workflow approval is required, then the following descriptions apply to the Work Order page:

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Setting Up a Work Order Business Unit, page 74.

Approval Status For a work order that requires approval, prior to initiating the approval process, this value displays as *Initial.*

Approval Preview Click this button to access the Work Order Approval page, which displays the work order's estimated labor, material, and tools costs, if they exist, and the approval map. Select users can add or remove approvers at this time. Users can click the Submit for Approval button directly from this page to submit the work order for approval, or they can return to the Work Order page to submit the work order for approval from there.

Submit for Approval Click this button to submit this work order for approval. The work order approval status changes to *Pending Approval.* When the work order approval process is complete, the approval status changes to *Approved.*

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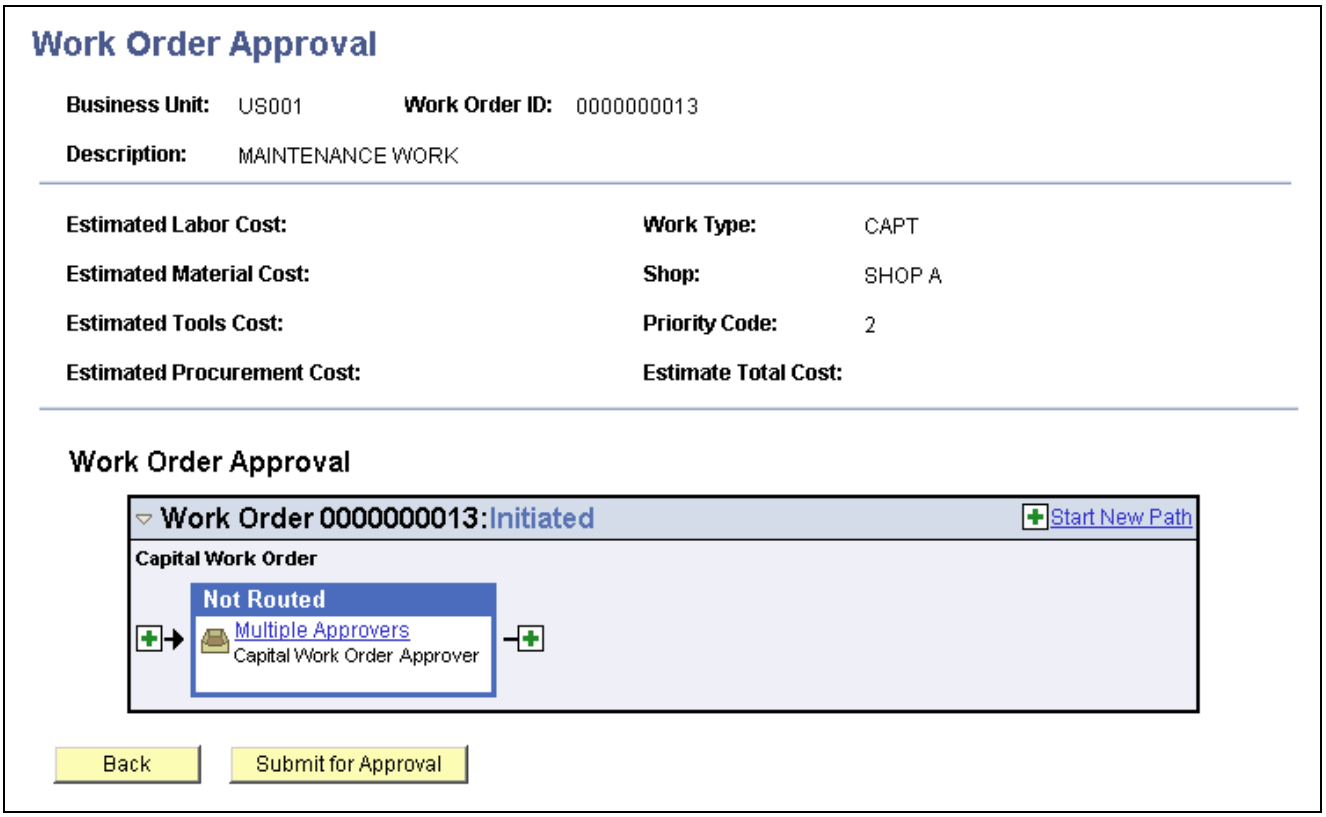
Approval History Click this link to review the work order approval history. This link appears only after a work order is submitted for approval. The Work Order Approval page displays the status of the work order in the approval process. This page is now in view-only mode.

Previewing Work Order Approvals

Access the Work Order Approval page by clicking the Preview Approval button on the Work Order page.



Work Order Approval page

Work Order Approval

Use this section of the Work Order Approval page to preview the approval flow.

Click to add an ad hoc approval path with additional approvers or reviewers for this work order. Another page appears for you to select the user ID, and whether the person is an ad hoc approver or reviewer.

Multiple Approvers If multiple approvers are required for a given path, click this link to review information about each approver.

<user ID> If a single approver is required for a given path, click the user ID to review information about that approver.

Click to add an ad hoc approver or reviewer to an existing path. Another page appears for you to select the user ID and whether the person is an ad hoc approver or reviewer.

Click to remove an ad hoc approver or reviewer for this work order.

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Submit for Approval Click to submit the work order for approval.

Submitting Work Orders for Approval

You can use either of the following methods to submit a work order for approval:

- Click the Submit button on the Work Order page.
- Click the Preview Approvals button on the Work Order page to access the Work Order Approval page, review and revise the approvals if needed, then click the Submit button.

Reviewing Work Order Approval History

Access the Work Order Approval page by clicking the Review Approval History link on the Work Order page.

Reviewing approval history

Approval Action

If you are viewing a work order for which you are designated as an approver, enter comments, and then click Approve or Deny to update the approval status of this work order.

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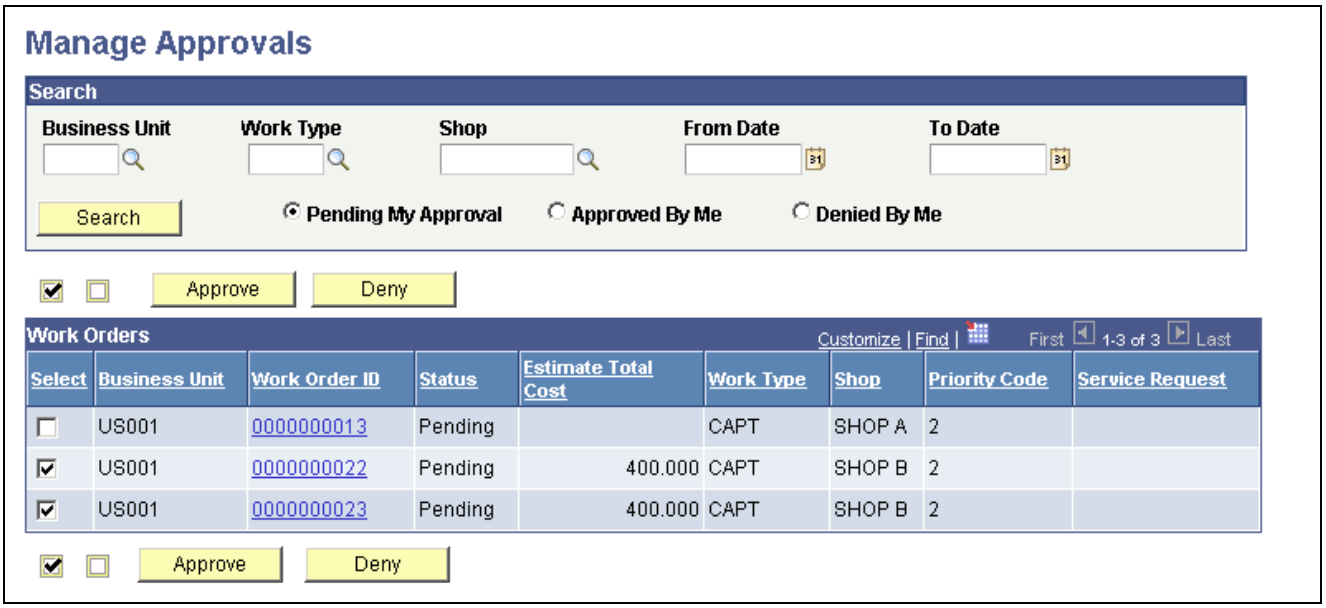
Approval Map

Multiple Approvers If multiple approvers are required for a given path, click this link to review information about each approver.

<user ID> If a single approver is required for a given path, click the user ID to review information about that approver.

Managing Work Order Approvals

Access the Manage Approvals page.



Manage Approvals page

Search

Select data in this group box to narrow your search for work orders at various stages in the approval process.

Business Unit, Work Type, and **Shop** Select any of these options to narrow your search for work orders requiring approval.

From Date and **To Date** Enter dates to restrict your search for work orders requiring approval within a specified date range.

Pending My Approval Select this option to narrow the search to work orders with an approval status of *Pending* for this logged-in user.

Approved By Me Select this option to narrow the search to work orders that were approved by this logged-in user.

Denied By Me Select this option to narrow the search to work orders that were denied approval by this logged-in user.

Search Click this button to perform a search for the work orders that fall within your specified search criteria. A list of work orders displays in the Work Orders group box.

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Work Orders

Select the work orders for which to modify the approval status.

Approve	Click this button to approve the selected work orders.
Deny	Click this button to deny the selected work orders.

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CHAPTER 16

Managing Warranty Claims

This chapter provides an overview of warranty claim management in Oracle's PeopleSoft Enterprise Maintenance Management and discusses how to manage warranty claims.

Understanding Warranty Claim Management in PeopleSoft Maintenance Management

Warranties are set up for assets in PeopleSoft Asset Management. Whenever an asset is repaired in PeopleSoft Maintenance Management, it is important for the technician to know whether any warranties exist for the asset and to determine whether to file a warranty claim for an asset that is being repaired. An outbound cost recovery claim may be filed to:

- Recover the cost of a work order task from the vendor or manufacturer who warranties the asset being repaired.
- Recover the cost from the vendor of a causal part associated with a work order task.
- Recover the cost of non-warranty related maintenance, such as a recall, from the manufacturer.

When you create a work order and select an asset or asset component, PeopleSoft Maintenance Management:

- Enables you to review the asset or asset component's warranty information.
- Enables the technician in the Technician's Workbench to record the asset's downtime hours and downtime rate, failure date, its warranty name, vendor information, and causal part information to drive the creation of a warranty claim that can be directly related to the work order task.

  You can also indicate whether to attempt to recover the costs for the asset's repair.

Note. Warranty claims always apply to a work order task and not the overall work order. You can group multiple work order tasks into one warranty claim as long as they are for the same vendor.

When a work order task is completed and closed and costs are collected, if you marked the task for cost recovery, the system routes the task to the warranty claims clerk. The warranty claims clerk uses the Generate Claim component to select work order tasks for which to generate warranty claims. You can group multiple tasks into one claim as long as the tasks are associated with the same vendor and work order business unit. All information entered at the work order task level is copied over to generate a claim.

After a claim is generated, a claims clerk can access the generated claim to:

- Print it and send it to the supplier for reimbursement, which is a manual process.
- Maintain the claim by entering information about recovered costs.
- Review and modify all cost information on the claim that was loaded from the work order tasks.

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Note. If you delete a claim line, the claim line ID field of the corresponding work order task is cleared so that a user can group the task into a different claim.

- Review meter readings that reside in the asset repository, which serve as supporting information for a claim.

  The clerk can delete an unrelated reading and add a reading that does not currently exist in the asset repository.

Note. Warranty claims are not associated with chargebacks based on a work order, and warranty claim history is not tracked in PeopleSoft Asset Management. Claims are tracked in PeopleSoft Maintenance Management.

Managing Warranty Claims

This section discusses how to:

- Review an asset's warranty.
- Search for asset warranty templates.
- Recover costs for work order tasks.
- Generate warranty claims.
- Revise and submit warranty claims.

Pages Used to Manage Warranty Claims

Page Name	Object Name	Navigation	Usage
Asset Warranties	ASSET_WARRANTY	• Maintenance Management, Work Order Management, Express Work Order, Update Warranty Claim • Click the Active Warranties icon on the Express Work Order page. • Click the Active Warranties icon on the Work Order page. • Click the Active Warranties icon on the Work Order - Requirements page.	Review the warranty information for assets that are associated with work order tasks.
Search for Asset Warranty Templates	AM_WTMPL_SRH	Click the Apply Warranties from Template link on the Asset Warranties page.	Search to find a Standard Warranty Template to apply to an asset.

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Page Name	Object Name	Navigation	Usage
Task Cost Recovery	WM_WO_TSK_CLAIM	• Click the Warranty Claim link on the Work Order - Requirements page. • Click the Warranty Claim link on the Work Order - Schedules page.	Indicate whether to recover costs for an asset, and specify downtime rates, vendor, warranty, and causal parts.
Generate Claim	WM_CLAIM_GEN	Maintenance Management, Warranty Claim, Generate Claim	Generate a warranty claim.
Warranty Claim - Claim Summary	WM_CLAIM_HDR	• Maintenance Management, Warranty Claim, Update Warranty Claim, Claim Summary • Click a claim ID on the Generate Claim page.	Review information for a warranty claim, update the status, and create the warranty claim report.
Warranty Claim - Vendor Contact	WM_CLAIM_VENDOR	Maintenance Management, Warranty Claim, Update Warranty Claim, Vendor Contact	Update vendor information for a warranty claim.
Warranty Claim - Cost Details	WM_CLAIM_COST_DTL	Maintenance Management, Warranty Claim, Update Warranty Claim, Cost Details	Update tasks and costs for a warranty claim
Warranty Claim - Related Meter Readings	WM_CLAIM_METER	Maintenance Management, Warranty Claim, Update Warranty Claim, Related Meter Readings	Update meter readings associated with a warranty claim.

Reviewing an Asset's Warranty

Click the Active Warranties icon within a work order or a work order task to access the Asset Warranties page in PeopleSoft Asset Management, where you can review any warranties that exist for an asset.

Active Warranties icon.

Note. This icon does not appear if the asset is not associated with a warranty.

If users have the appropriate security in PeopleSoft Asset Management, they can add or update warranty information for the asset. The user completes the information on the page or applies a warranty template.

Detailed information about the Asset Warranties page is available in the PeopleSoft Asset Management PeopleBook.

See *PeopleSoft Enterprise Asset Management 9.0 PeopleBook*, "Adding and Maintaining Assets," Maintaining Warranties.

Searching for Asset Warranty Templates

Access the Search for Asset Warranty Templates page.

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Use this search page to find a defined standard warranty template and apply the warranty terms to this asset.

Enter search criteria to restrict template selections based on:

- Asset type
- Asset subtype
- Vendor ID
- Model
- Item ID

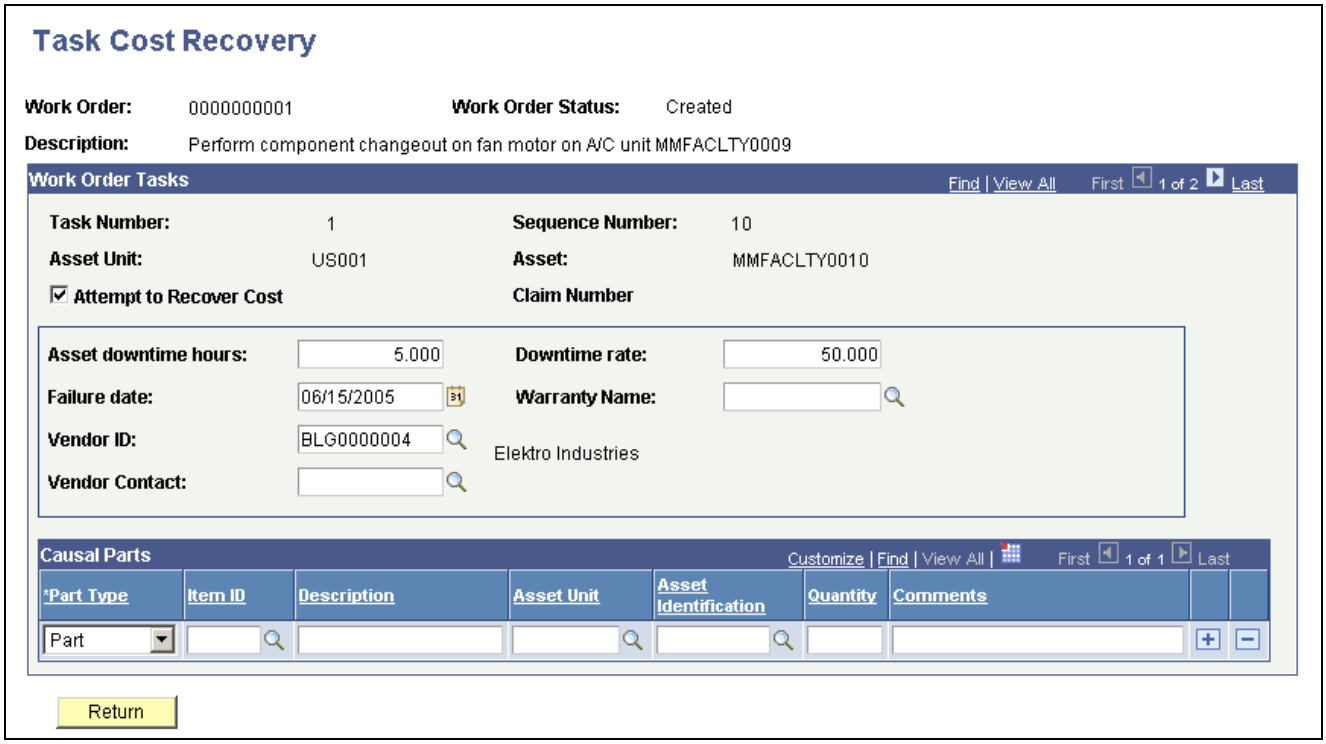
The valid warranty templates matching the search criteria appear, and you can select one to associate with this asset. Standard warranties are defined on the Standard Warranty Template.

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, "Establishing Asset Processing," Setting Up Asset Warranties.

Asset Type and **Asset Subtype** Override these fields, if necessary. The field values that display here depend on the asset selected for the work order or work order task.

Recovering Costs for Work Order Tasks

Access the Task Cost Recovery page.



Task Cost Recovery page

Attempt to Recover Cost Select this check box if the asset was repaired within your organization to indicate that you want to recover the cost of the repairs for this task's asset from the vendor by generating a warranty claim. The system routes the task to a claim clerk when this option is selected.

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Clear this option if either the asset is sent to the vendor for repair or replacement or the repair is not one for which the vendor will reimburse.

Claim Number The claim number appears only if the work order task is complete and a warranty claim has been generated. Click the claim number to access the Warranty Claim component pages for this task. The system automatically generates claim numbers.

Asset downtime hours Enter the hours the asset was unable to be used for work purposes. The value for this field is derived from the work order task information, but you can override it if necessary.

Downtime rate Enter the hourly rate to charge for the time the asset was down and unable to be used.

Failure date Enter or select the date the asset went down. The value for this field is derived from the work order task information, but you can override it if necessary.

Warranty Name Select the name of the warranty covering this asset.

Vendor ID and **Vendor Contact** Enter or select the ID of the vendor that issued this warranty and select the vendor's contact person for this warranty. The system automatically populates these fields with the vendor information associated with the specified warranty.

Causal Parts Identify parts that are either from PeopleSoft Inventory or PeopleSoft Asset Management that caused this asset to be down. Enter or select the:

- Line number
- Part type
- Item ID
- AM business unit
- Asset identification
- Description
- Quantity
- Comments

Generating Warranty Claims

Access the Generate Claim page.

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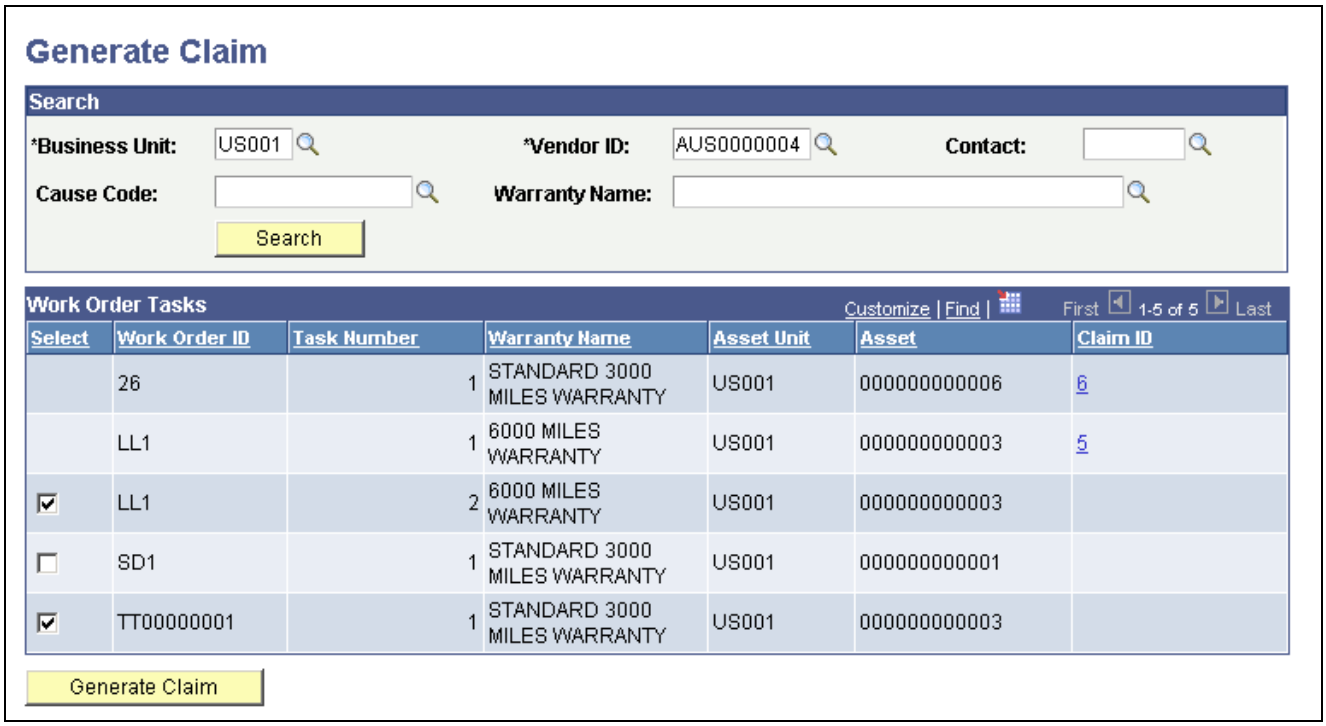

Generate Claim page

Search

Business Unit, Vendor ID, Contact, Cause Code, and **Warranty Name** — Specify the criteria by which to retrieve work order tasks that are pending warranty claims by selecting values for the business unit and vendor ID, and clicking the Search button. You can optionally select a contact, cause code, and warranty name to further limit the work orders tasks that you retrieve.

Work Order Tasks

The work order tasks that meet the search criteria specified appear in this grid. Select the tasks for which to generate a warranty claim, then click Generate Claim to create a warranty claim. The page updates and the claim ID appears.

Generate Claim — Select the tasks for which to generate a warranty claim, then click this button to create a warranty claim.

Claim ID — This appears if the associated task has a generated warranty claim. Click the claim ID to access the Warranty Claim component pages for the task.

Revising and Submitting Warranty Claims

Access the Warranty Claim component.

Warranty Claim - Claim Summary Page

This page shows a summary of the costs related to the warranty claim.

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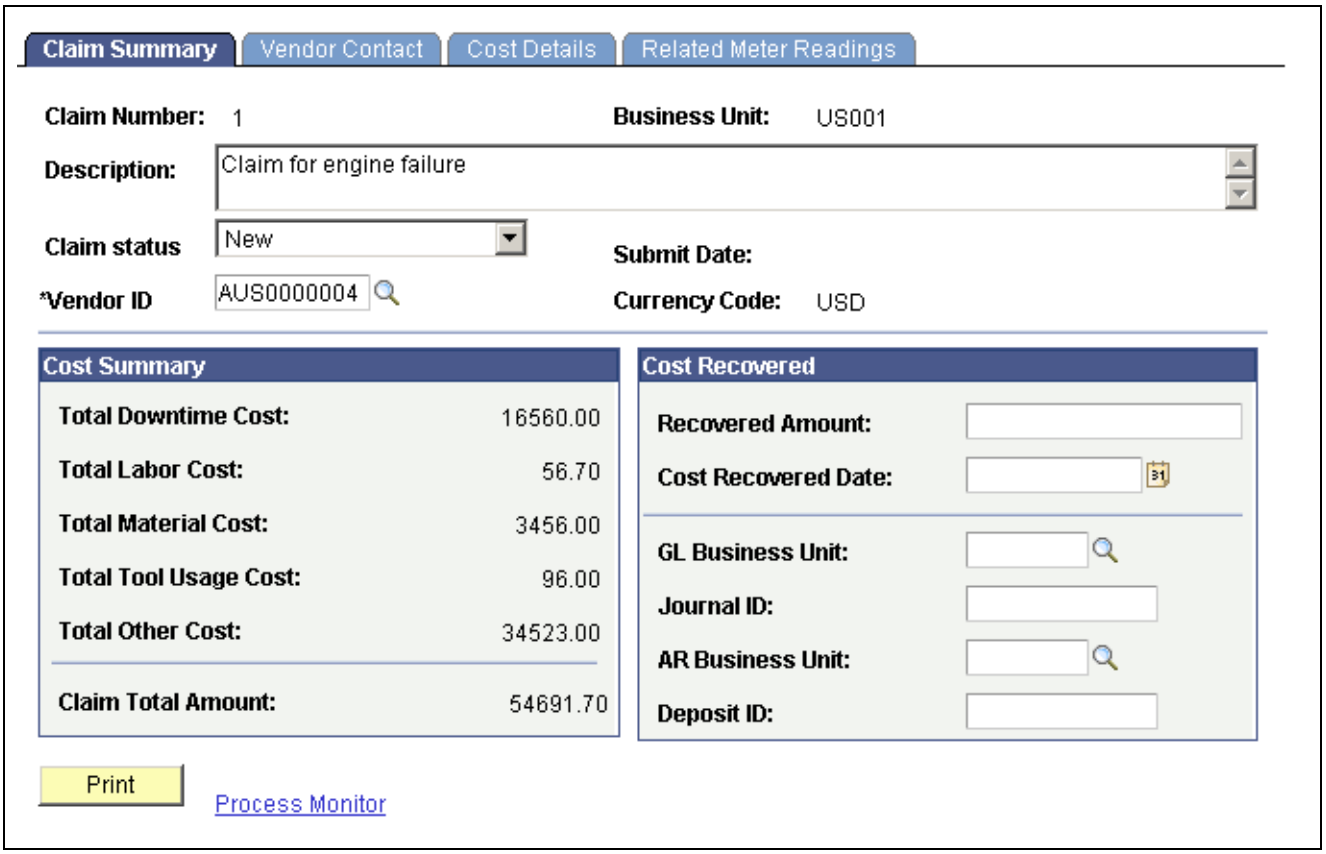

Warranty Claim - Claim Summary page

The Cost Summary group box displays totals of the various cost amounts for the warranty claim, and the total claim amount. These values are display-only because they are summarized amounts from the Warranty Claim - Cost Details page.

The claim status controls which of the other fields you can modify on this page. If the claim status is *New,* you can modify all the remaining fields. If the status is *Submitted* or *Resubmitted,* you can edit only the Claim Status field. If the claim status is *Recovered,* you can edit only the fields in the Cost Recovered group box.

Claim Status

Select a value to update the status of the warranty claim. Options are:

New: The initial status value once a claim is generated.

Submitted: Indicates that you have printed and mailed the claim in order to recover the costs.

Resubmitted: Indicates that the initial claim was rejected by the supplier, and you are submitting the claim again.

Recovered: Indicates that you have received payment for the costs.

Canceled: Indicates you are cancelling the claim and no longer intend to recover the costs.

Recovered Amount and **Cost Recovered Date**

Enter the amount recovered from the vendor, and the date you received the payment.

GL Business Unit and **Journal ID**

Optionally, enter a general ledger business unit and journal ID to cross reference the associated accounting information related to the recovered costs.

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	Note. You must manually enter a general ledger journal entry and accounts receivable invoice to record the transaction; the fields on this page are informational only.
AR Business Unit and **Deposit ID**	Optionally, enter the accounts receivable business unit and deposit ID to record invoice information related to the transaction.
	Note. You must manually enter a general ledger journal entry and accounts receivable invoice to record the transaction; the fields on this page are informational only.
Print	Click to launch the warranty claim report process, and generate a report for the claim that you can send to the vendor.

Note. Accounting entries that are associated with cost recovery must be done manually. The system does not automatically generate them.

Warranty Claim - Vendor Contact Page

This page displays the vendor contact information, which you can update if necessary.

Warranty Claim - Cost Details Page

This page displays the individual lines of the warranty claim; each line corresponds to a work order task. All cost information associated with the work order tasks is copied over to the claim line. You can make changes to these lines if needed.

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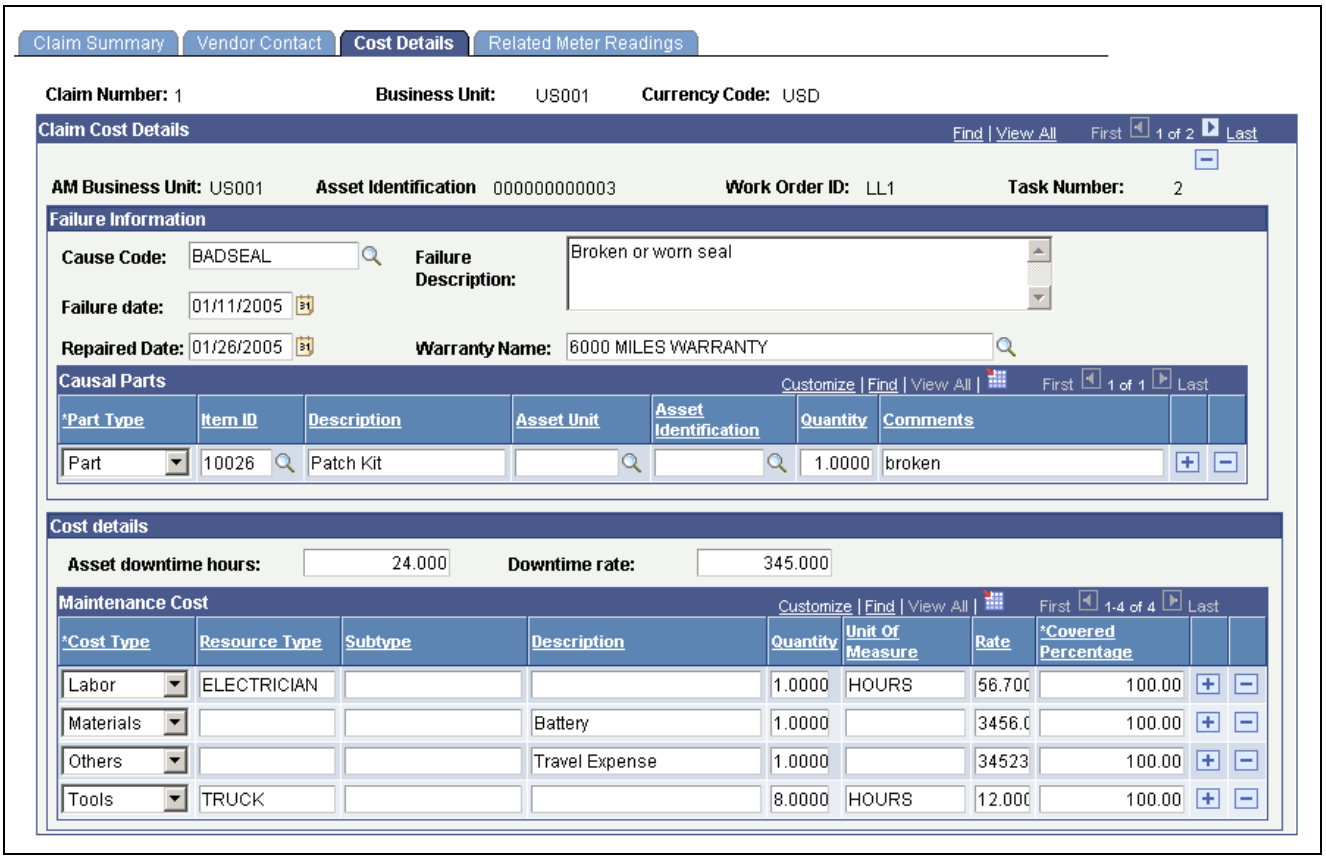
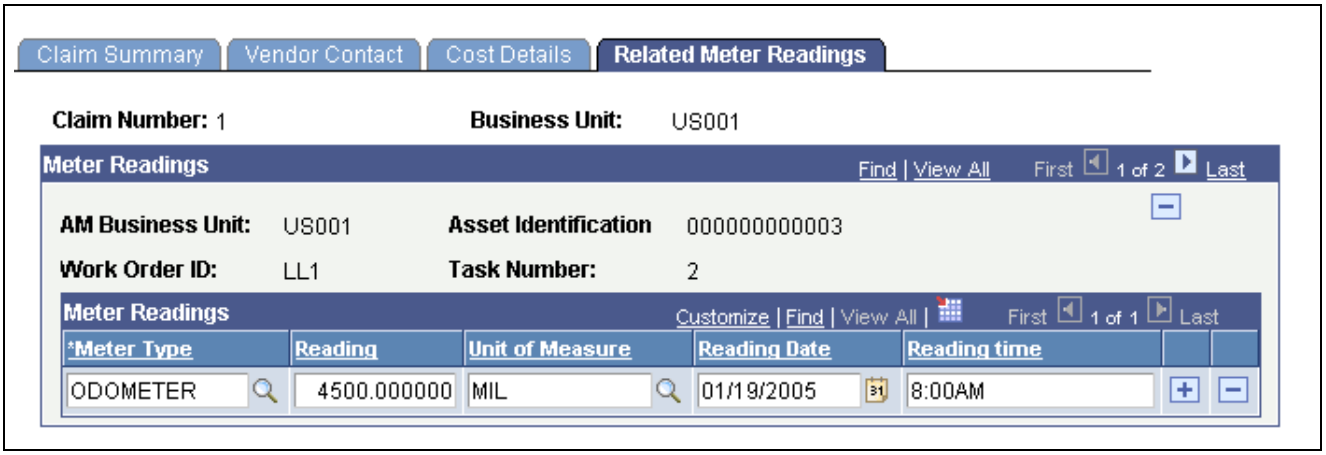


Warranty Claim - Cost Details page

If a claim line is deleted, the claim ID field of the corresponding work order task is set to blank so that it can be grouped into a different claim.

Warranty Claim - Related Meter Readings Page

This page displays the asset repository meter readings that support this claim. You can delete unrelated readings and add readings if necessary.



Warranty Claim - Related Meter Readings page

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CHAPTER 17

Defining Work Order Task Requirements

This chapter presents an overview of Oracle's PeopleSoft Enterprise PeopleSoft Maintenance Management work order task resource requirements and discusses how to define resource requirements for a work order task.

Understanding Work Order Task Resource Requirements

Work order task requirements are used for planning the resources needed and determining the estimated costs to complete each work order task. You optionally define these requirements before submitting the work order for approval. You can also load these requirements into Microsoft Project for further planning and analysis. In addition, you can easily define these requirements by copying work order job and work order task templates to the work order. If you schedule these work order tasks, you can copy these requirements to the corresponding fields in the schedule.

Note. When you access a new work order that requires approval, the Schedules tab and page does not appear in the work order until the work order has been approved.

You click a link on the Requirements page to set up resource requirements, which include:

- Labor requirements.
- Inventory requirements.
- Purchase and on-hand requirements.
- Tool requirements.

Important! You must select the appropriate check box in the work order business unit definition, shop definition, and user preferences page to enable you to access and enter these requirements. You must install the PeopleSoft Inventory product before the Inventory link in the Requirements page displays.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Work Order Business Unit Setup, page 75.

If a work order requires approval, then you must define these resource requirements before they are submitted for approval. Once the work order's status is *approval pending* or *approved*, you can no longer define requirements.

You can use three different methods to set up resource requirements for a work order task:

- Entering the resource requirements manually in the work order's Requirements page.
- Selecting a predefined work order job or task template.

  The resource requirements are copied into the work order as part of each task.
- Copying to another work order.

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You can select specific resource requirements that you want to copy to another work order.

See Chapter 14, "Creating a Work Order," Copying to a New Work Order, page 391.

Some work orders require a limited number of resources to perform the work and may not need any resource requirements defined or scheduled. In this case, you may want to use the Express Work Order component, which is designed for quick and easy work order creation.

Note. You can only specify inventoried and purchase/on-hand resource requirements for an express work order.

Labor Requirements

When you click the Labor link on the work order's Requirement's page, a Labor Requirements group box displays with a grid containing these tabs:

- Details.
- Timetable.
- Estimated Cost.
- Crew Assignments.
- Crew Timetable.

Important! If you do not select the View WO Requirements check box on the User Preferences - Maintenance Management page, the Labor link will be disabled on the Requirements page of the work order. Also, if you do not select the Labor Requirements check box on either the Definition page of the work order business unit, or the Shop Information page, the Laborlink will be disabled on the Requirements page of the work order.

You can optionally set up labor requirements to determine the number of resources from a craft with specific qualifications that are needed to perform a work order task, as well as enter how long it will take to perform the task. When you enter the labor cost and billing rates, the system calculates the estimated labor costs for each labor resource requirement line in the task. In addition, the system calculates and tracks the total estimated labor costs for each work order and each work order task and displays them on the work order's Cost page and on the Work Order History, Summary page. When the tasks are scheduled and executed, the Cost page displays the total scheduled labor costs and later the actual labor costs for the work order and for each work order task, along with the variance between the estimated and actual costs.

See Chapter 23, "Reviewing PeopleSoft Maintenance Management Inquiries," Using the Work Order History Inquiry, page 642.

Before you can define labor requirements for a task, you must set up crafts and optionally associate a qualification profile with a craft. When you select labor resource requirements in the Details grid for a work order task, you select the crafts needed to perform the work order task, the number of resources needed per craft, and the total number of hours it will take each of these resources to complete the task. In addition, when you select the craft, you can click the link to the qualifications profile associated with the craft and modify these qualifications so that they correspond more specifically to the work order task. You can also add or copy a qualification profile to associate with the selected craft. Later, if you copy these requirements to the schedule, the Resource Matching process can use these qualifications to match resources to the task.

The selected craft, quantity, and hours also apply to a crew when crew scheduling is activated for the shop, which is associated with the work order. If crew scheduling is not activated in the shop, the Crew Assignment and Crew Timetable tabs do not appear on the page.

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The work order task's required start and end dates and times display as the default values in the Timetable grid. You can override this information as necessary for each labor requirement that you specify for a work order task. Each labor requirement can have different requirement start and end dates and times than the work order task's required start and end dates and times. However, the start and end dates and times for each labor requirement must fall within the work order task's required start and end dates and times.

To calculate estimated cost, the default standard hourly bill rate and cost rate display in the Estimated Cost grid and are derived from either the work order business unit level, the shop header level, or the craft specified in the shop. You can enable specific users to override these default values in the work order in User Preferences, if desired. The system multiplies these rates times the number of resources per craft and the total number of hours required to complete the task and calculates the estimated cost for each resource requirement. The total estimated labor costs for the entire work order and each task display on the work order's Cost page and the Work Order History, Summary page.

The default currency code used for all requirements and schedules is set up in the work order business unit. Even if the work order task transactions are processed by an application, such as PeopleSoft Inventory, that uses a different currency code, the transaction amounts are converted back into the currency code identified in the work order business unit and displayed in PeopleSoft Maintenance Management.

When you define the labor requirements by craft, the craft, quantity, and hours entered display in Crew Assignments tab. The crew shop, crew, scheduled hours, and carryover hours field values are updated when the crew is assigned on the Crew Scheduling Workbench to this task.

The crew start and end dates and times and the completed date fields on Crew Timetable tab are updated based on entries in the Crew Scheduling Workbench for this task.

Note. The fields on these two tabs are not updated if crew scheduling is not applied to this work order.

See Chapter 19, "Performing Crew Scheduling," page 523.

See Also

Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165

Inventory Requirements

Inventory parts requirements are determined based on the PeopleSoft Maintenance Management integration with PeopleSoft Inventory. You can identify inventory parts requirements for a work order by:

- Selecting a work order task template associated with the asset being repaired, which copies the inventory requirements defined in the template to a task.
- Selecting the parts manually on the work order task's Inventory Requirements grid.
- Selecting inventory items from the equipment parts list (EPL).

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Within PeopleSoft Asset Management you can optionally set up the EPL for an asset category. The EPL template can then be defined to an asset. When you identify the asset on the work order and inventory parts exist for the Inventory business unit that is identified in the work order business unit, the EPL button is enabled. Otherwise the EPL button is not visible on the work order Requirements page. If the EPL is enabled, you can potentially search multiple EPL templates to find the inventory items that are most appropriate for the task. These items can then be selected and copied to the Inventory Requirements grid for the task as appropriate. depending on whether a single applicable EPL template or multiple templates exist for the identified target asset, the information that displays on the Equipment Parts List page changes accordingly. For single template selection, the applicable EPL template is display-only at the top of the page along with a check box, which, if shown selected, indicates that this template is the designated default for the asset. The user can go directly to the Parts List grid and select items to copy to the task.

For multi-template selection, the various template choices, which are listed in descending order of applicability, display at the top of the Equipment Parts List page. Any default template defined for the asset will always be listed first. The user selects from among the available templates and then copies selected parts items to the task.

Important! The Inventory link does not appear on the Requirements page if the PeopleSoft Inventory product is not installed. You must select the appropriate check box in the work order business unit definition, shop definition, and user preferences page to enable you to access and enter these requirements.

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, "Establishing Asset Processing," Setting Up Equipment Parts Lists.

Inventory requirements are defined on three tabs:

- Details.
- Default Settings.
- Estimated Cost.

When you select the Details tab, you can select an item from the Inventory Item prompt list, or optionally select the Item ID expanded search icon that enables you to enter more search criteria. The Inventory Requirements and Scheduling pages are only used for Inventory item planning and scheduling. Once you select an item, you can then enter the planned quantity and whether you need to provide delivery instructions. If you select the Delivery Flag check box, you can enter delivery instructions and indicate either that you plan to pick the item up, that you want it delivered to a specific location, or that you intend to follow your organization's delivery policies. The item type indicates if the item can be obtained from PeopleSoft Inventory or is a floor stock item that is maintained within the shop and not obtained from the inventory warehouse. Floor stock items are not included in the overall estimated cost of Inventory Requirements as they have already been costed and accounted for by a purchase order unrelated to the work order.

Note. The items that are available on the Item ID prompt are specific to the Inventory business unit that is set up on the Integration page of the work order business unit.

When you select the Default Settings tab, the default values for the Inventory business unit and the GL business unit are derived from the work order business unit's Integration page. The default item setID is based on the setID associated with the Inventory business unit on the work order business unit's Integration page. This grid also displays the commitment status of the item and a supplier reference. The commitment status is determined by the Inventory Commit Rule that you set up on the Integration page of the work order business unit, the Shop Information page, or Define Shop - Type page. The supplier reference only displays if you copied the item from the EPL and the supplier reference was indicated in the EPL.

See Chapter 18, "Scheduling a Work Order," Inventory Resource Scheduling, page 451.

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Select the Estimated Cost tab, where the default value of the estimated unit cost is derived from the selected item setup. The planned quantity is multiplied by the unit cost to come up with the estimated cost for each item. The total estimated inventory costs for each task and the work order appear on the work order's Cost page and the Work Order History, Summary page.

See Chapter 23, "Reviewing PeopleSoft Maintenance Management Inquiries," Reviewing the Work Order History Inquiry, page 642.

Purchased and On-Hand Resource Requirements

When you click the Purchase/On-hand link on the Requirements page, you can identify noninventory items that are not stored and tracked by any Inventory business units. You can also enter open description lines that contain a description of the goods or services that you want to procure for the work order. These items, along with selected tools and contracted labor and services are added to the Purchase/On-hand grid to enable users to create requisitions or purchase orders in the Schedules page of the work order. If you have to procure certain goods or services often, you can establish a noninventory item ID for this type of procurement need and then select the item ID instead of using open descriptions to identify the item.

You can also identify on-hand items, which are goods and services that you have at your disposal, are not obtained from PeopleSoft Inventory, and do not need to be procured. You identify them to indicate that they are needed for successful completion of the work order. Lines marked as on-hand are for information purposes only and do not accumulate in the work order costs. An example of this type of item might be computer hard drives that were previously procured and needed to complete a work order. The hard drives were expensed previously but may be needed to complete the work order task. In this case, the organization does not need to rigorously track the drives in the PeopleSoft Inventory application.

An EPL button appears for purchase/on-hand requirements based on whether asset identified in the work order task line has noninventory parts or open description items defined in an equipment parts list.

The Purchase/On-Hand Requirements grid contains three tabs:

- A Details grid.
- A Default settings grid.
- An Estimates grid.

You either select an item or enter a description in the Details grid and identify whether the item or open description is categorized as labor, material, or tools. You enter the quantity needed and the unit of measure and identify whether this item will be considered on-hand in the shop (the costs are not tracked). You can also enter delivery instructions.

The default settings include the GL business unit specified in the work order business unit, and item setID, which is derived from the work order business unit associated with the item table.

The estimated costs in the Estimated Cost grid are calculated by multiplying the planned quantity times a unit cost value, which you enter or is derived from the system. The unit cost field derives its value from the standard cost of the noninventory item, if a standard cost has been established. If a standard cost was not established, you must enter a cost for the item. You must enter the estimated cost for open description rows.

Tool Resource Requirements

A tool is a piece of equipment that is specifically designated for use in the maintenance and repair of other assets. A tool is normally stored in PeopleSoft Asset Management's asset repository and can be specified by asset type and subtype, manufacturer, and model. Access the Tool Requirements grid to enter:

- Details.

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- Timetable.
- Estimated Cost.

Important! If you do not select the View WO Requirements check box on the User Preferences - Maintenance Management page, the Tools link will be disabled on the Requirements page of the work order. Also, if you do not select the Tools Usage Requirements check box on either the Definition page of the work order business unit, or the Shop Information page, the Tools link will be disabled on the Requirements page of the work order.

You select the Details tab, where you can specify the asset type, asset subtype, manufacturer, and model for each tool that you plan to use for a work order task. You must at a minimum specify the asset type and subtype. You identify the quantity needed and how long the tool is needed to complete the work order task. You enter the estimated usage to determine the costs. For example, you may only need a truck for two hours to haul equipment to complete a work order task. However, because the cost to rent the truck is 20.00 USD per day, you should enter an estimated usage of one day. When you enter the Estimated Cost grid, the cost (20.00 USD) is multiplied times the estimated usage (1 day) and the quantity needed to determine the estimated cost.

You select the Timetable grid, where the work order's required start and end dates and times display as the default values in the Timetable grid. You can override this information as necessary for each type of tool that you specify for a work order task. Each tool requirement can have different requirement start and end dates and times than the work order task's required start and end dates and times. However, the start and end dates and times for each tool requirement must fall within the work order task's required start and end dates and times.

You select the Estimated Cost tab, which contains the cost and billing rates for a specific tool. The default rate values are derived from the asset subtype selection or the tool rates defined in the shop associated with the work order. The estimated usage is multiplied times the cost and bill rates and the quantity to determine the estimated cost and billing amount. The total estimated cost for tools used for a work order task is displayed in the work order's cost page and compared against the actual costs as these values are accumulated based on the execution of the work order and work order tasks.

You can copy the tool requirements to the schedule by using the Copy from Requirement button on the Schedule page. These requirements, like the labor requirements, can be analyzed by the Resource Matching engine to identify qualified and available tools.

Work Order Job and Task Template Usage

To reduce data-entry time, you can set up work order job and work order task templates, which define work order requirements and can apply to more than one work order. You can click the Job Template link in the Work Order page to copy a job template to the work order. A job template consists of one or more task templates set up in sequence. You set up a work order task template based on selected asset characteristics and define the resource requirements needed to complete the task.

For example, you could set up a work order job template for a 3,000 mile maintenance for asset type (Fleet) and asset subtype (Automobiles). The task templates that you add to the job template are:

1. Change engine oil.
2. Flush radiator.
3. Rotate tires.

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Each task template consists of the typical resource requirements to perform the task. When you create a work order to perform a 3,000 mile maintenance for your fleet of electric automobiles, you can select the 3000 Mile Maintenance job template and its associated work order tasks to copy to the work order. Each of the three tasks and their requirements specified in the template are copied to the work order. You can override the specified requirements, if necessary, as well as add tasks, work order job templates, and individual task templates to the work order. In addition, if you are scheduling the work order, you can also copy these requirements to the schedule.

You can select specific problem, cause, and resolution data to more specifically locate the template that best suits the work order. You do this by associating a particular task or job template with a predefined resolution code, and, if that resolution code is linked to a problem group, you can expedite the search for the most appropriate template to apply to the asset and problem and cause codes specified on the work order. When the template is copied to the work order, you can optionally choose to also copy the PCR lookup data to the individual task line or lines on the work order.

See Chapter 9, “Defining Work Order Templates,” Understanding Work Order Templates, page 239.

Defining Resource Requirements for a Work Order Task

To define work order task requirements use the Work Order (WM_WO) component.

This section discusses how to:

- Define labor resource requirements for a work order task.
- Modify the labor qualifications profile.
- Specify inventory resource requirements for a work order task.
- Identify purchase and on-hand resource requirements for a work order task.
- Define tool resources for a work order task.

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Pages Used to Define Resource Requirements for a Work Order Task

Page Name	Object Name	Navigation	Usage
Requirements	WM_WO_TASK_RQMT	Maintenance Management, Work Order Management, Work Order, Requirements	Set up a work order task and identify resource requirements.
Labor Qualifications	WM_TASKLBRQUAL_SEC	Click the Qualifications View link on the Labor Requirements - Details grid.	Review and modify the qualification profile set up for a craft specified as a requirement in a work order task.
Delivery Instructions	WM_WO_DELIVERY_SEC	Maintenance Management, Work Order Management, Work Order, Requirements, Inventory Requirements - Details grid Click the Delivery Instructions link.	Enter the instructions for how and where you want an inventory item delivered in order to perform a work order task.
Equipment Parts List	WM_EPL_SELECT_SEC	Click the Equipment Parts List button above the Inventory Requirements grid on the Requirements page. • Click the Equipment Parts List button above the Purchase/On-Hand Requirements grid on the Requirements page. • Click the Equipment Parts List button above the Inventory Requirements grid on the Requirements page.	Select items or materials from one or more Equipment Parts List templates to use as resources in a work order task.
Work Order Supplemental Data	WM_TSK_SD_SEC	Click the Supplemental Data link in the Requirements page to display the Work Order Supplemental Data page.	Displays any supplemental data that has been set up for this work order task. See Chapter 24, "Using Supplemental Data," Establishing Supplemental Data, page 656.
Work Order Task Notes	WM_TSK_NOTES	Click the Notes link in the Requirements page to display the Work Order Task Notes page.	Add or review any notes related to this work order task. See Chapter 14, "Creating a Work Order," Creating a Work Order, page 382.

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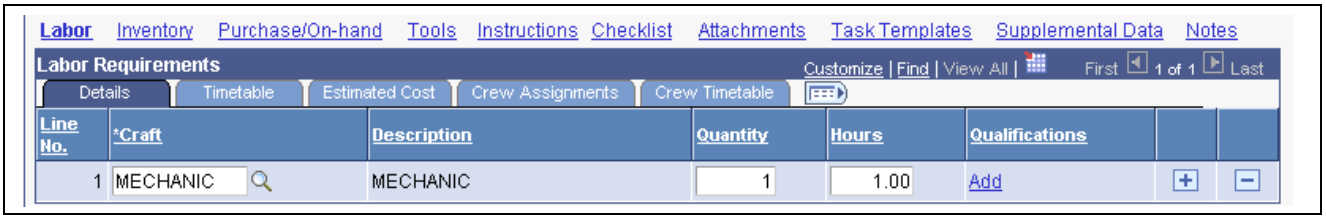
Defining Labor Resource Requirements for a Work Order Task

Access the Labor Requirements in the Requirements page.



Requirements page - Labor Requirements - Details tab

Labor Requirements - Details

Select the Details tab.

Craft Add a row for each type of craft and select the craft required for this work order task.

Quantity Enter the number of resources needed to perform this work order task for each craft.

Hours Enter the total number of hours for each of the specified number of resources to perform this work order task.

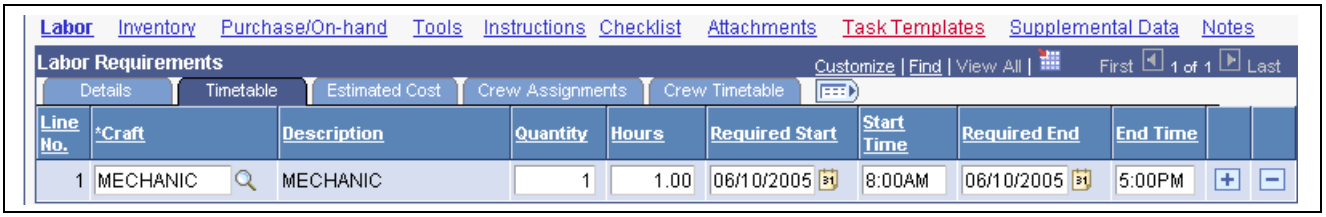
Qualifications Click the link to review, add, and modify labor qualifications that are applicable to the selected craft for this work order task.

Note. The link shows *Add* by default. If a craft is selected and a qualification profile is associated with that craft, the link changes to *View*. If no qualification profile is associated to the craft, the link value is *Add* until you manually add the qualifications for the craft and save.

See Chapter 8, "Setting Up Labor and Tools Resources," Adding and Maintaining Qualification Profiles, page 177.

Labor Requirements - Timetable

Select the Timetable grid.



Requirements page – Labor Requirements, Timetable tab

Required Start, Start Time, Required End, and **End Time** Enter the start and end date and time values for each craft based on the duration entered in the Details grid. The default values that display in these fields for a new work order task are derived from the required start and end dates and times for the work order task. The values entered here cannot exceed the required start and end dates and times for the task.

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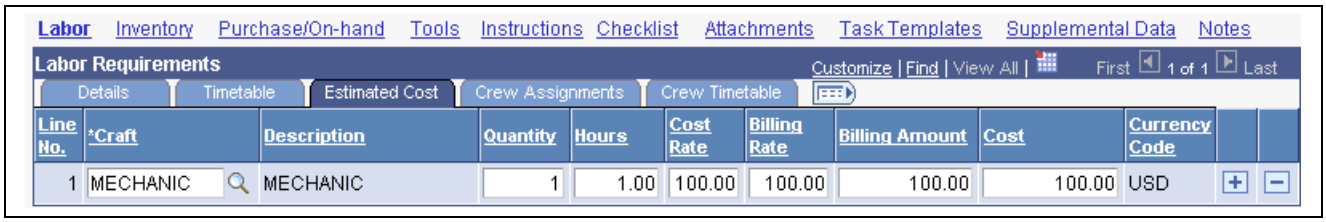
Labor Requirements - Estimated Cost

Access the Labor Requirements - Estimated Cost grid.



Requirements page - Labor Requirements, Estimated Cost tab

Cost Rate and **Billing Rate** — View or modify the default rates. The default values are derived from the work order business unit or shop.

Billing Amount and **Cost** — Click the Save button for the system to calculate these amounts by multiplying the total number of hours for the task times the rates and the number (quantity) of craft resources required. This calculation is used to determine whether the labor requirements are necessary.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Defaults and Default Hierarchies, page 83.

Currency — View the default currency. The default value is derived from the currency specified in the work order business unit.

Labor Requirements - Crew Assignments

Access the Crew Assignments grid:

Requirements page - Labor Requirements, Crew Assignments tab

Crew Business Unit — Displays the business unit associated with the default preferred crew in the work order, if the crew is unscheduled. Once the crew is scheduled, displays the business unit to which the selected crew is assigned on the Crew Scheduling Workbench. This field is updated by the Crew Scheduling Workbench and is display-only.

Crew Shop — Displays the shop associated with the default preferred crew in the work order, if the crew is unscheduled. Once the crew is scheduled, displays the shop to which the selected crew is assigned on the Crew Scheduling Workbench. This field is updated by the Crew Scheduling Workbench and is display-only.

Crew — Displays the crew assigned in the Crew Scheduling Workbench. This field is display-only.

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Scheduled Hours Displays the hours for which the crew was scheduled in the Crew Scheduling Workbench. This field is display-only.

Carryover Hours Displays the hours that are carried forward from the period that the requirement was originally assigned to onto a new period, if the assignment was not completed within the original period. This field is display-only.

Completed Hours Displays the number of actual hours completed on the job reported by technicians or crew schedulers. This field is display-only.

See Chapter 19, "Performing Crew Scheduling," page 523.

Labor Requirements - Crew Timetable

Access the Crew Timetable grid:

Requirements page - Labor Requirements, Crew Timetable tab

Crew Start Date and **Start Time** Displays the intended date and time for the specified crew to start this task. This field is display-only.

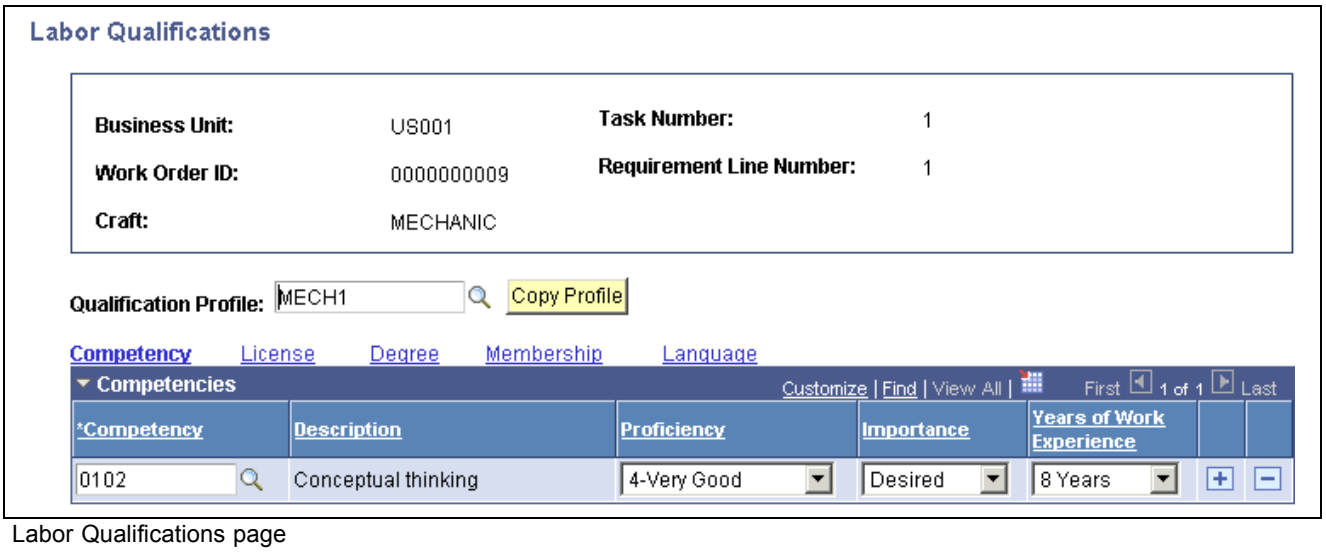
Crew End Date and **End Time** Displays the intended date and time for the specified crew to end this task. This field is display-only.

Completed Date Displays the date that the crew actually completed the task. This field is display-only.

See Chapter 19, "Performing Crew Scheduling," page 523.

Modifying the Labor Qualifications Profile

Access the Labor Qualifications page.



Labor Qualifications page

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The system automatically copies the qualification profile associated with a selected craft. You can add and modify the competencies and qualifications associated with this profile. You can also search for and copy another profile's attributes using the following options.

Qualification Profile Select an existing qualification profile and the system automatically copies the craft's profile information into the Competencies, Licenses, Degrees, Memberships, and Languages grids by clicking the Copy Profile button. Modify this information as necessary.

Note. You can also select another craft's profile to copy, even if the profile for the craft displays in the grid. The additional lines from the profile that you copy are added to the existing profile's lines in the grid.

Copy Profile Click this button to copy the selected qualification profile's competencies and qualifications to the page. You can add to the attributes or modify them as necessary to apply to the work order task.

Competency Click this link to add one or more competencies manually, including proficiency, importance, and years of work experience needed for this type of craft's worker to perform this work order task.

License Click this link to add one or more licenses manually, including the accomplishment, country, state, and importance, needed for this type of craft's worker to perform this work order task.

Degree Click this link and add one or more degrees, including the accomplishment, major code, and importance, needed for this type of craft's worker to perform this work order task.

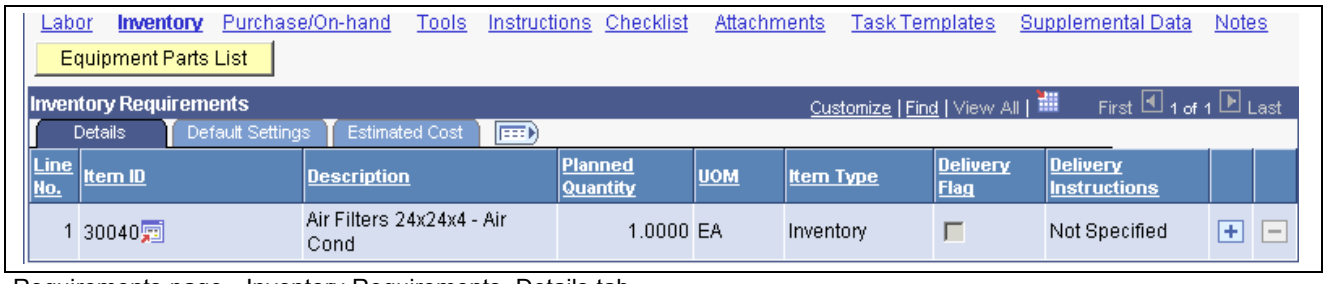
Membership Click this link to add one or more memberships manually, including the accomplishment and importance, needed for this type of craft's worker to perform this task.

Language Click this link to add one or more languages manually, including the accomplishment, abilities to speak, read, and write the language, and importance, needed for this type of craft's worker to perform this task.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Qualification and Employee Data in PeopleSoft Maintenance Management, page 171.

Specifying Inventory Resource Requirements for a Work Order Task

Access the Inventory Requirements in the Requirements page.



Requirements page - Inventory Requirements, Details tab

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Inventory Requirements - Details

Select the Details tab.

Item ID Select an item from the Inventory business unit item table to use to perform this task. Default values appear in all of the fields in the grid, except for the Planned Quantityfield based on the selected item.

Note. You can only select Inventory items in this grid. The items that can be selected are only items that are defined for the Inventory business unit that is defined for the Work Order business unit.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," PeopleSoft Inventory Setup Considerations, page 60.

Planned Quantity Enter the quantity of the item needed to perform the task.

UOM (unit of measure) Displays default standard UOM when the item is selected. Each item has a standard UOM. You can change the UOM if additional UOM values are defined for the selected item.

Item Type Identifies whether the item is:

- *Inventory*

  This type of item is obtained from the inventory warehouse.

- *Floor Stock*

  This type of item is maintained within the shop and not obtained from the inventory warehouse. Floor stock items are not included in the overall estimated cost of Inventory Requirements as they have already been costed and accounted for by a purchase order that is unrelated to the work order. Floor stock item types are for information purposes only.

Delivery Flag Select this check box if you want to add instructions for obtaining the item. Selecting this check box enables you to click the Delivery Instruction link to access the Delivery Instruction page.

Delivery Instructions Enter delivery instructions for PeopleSoft Inventory to know where and how you want to obtain the selected item for the work order task. You can enter that you plan to pick up the item, as well as have it delivered, depending on the needs of the particular work order task and the item.

Inventory Requirements - Default Settings

Select the Default Setting tab.

Requirements page - Inventory Requirements, Default Settings tab

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Commit Displays one of the following values:

- *Committed*

  Indicates that the item in PeopleSoft Inventory has been committed and PeopleSoft Inventory is aware of the demand for this item by the work order. Inventory items are committed in Maintenance Management based on the Work Order Commit Rules that you select in the work order business unit, shop, or shop/type.

- *Not Committed*

  Indicates that the item has not yet placed demand on inventory. In most cases committing the item happens when the item is scheduled in the work order.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Setting Up Integration Parameters for a Work Order Business Unit, page 99.

Inventory Unit Displays the inventory default business unit value, which is derived from the value entered in the work order business unit's Integration page.

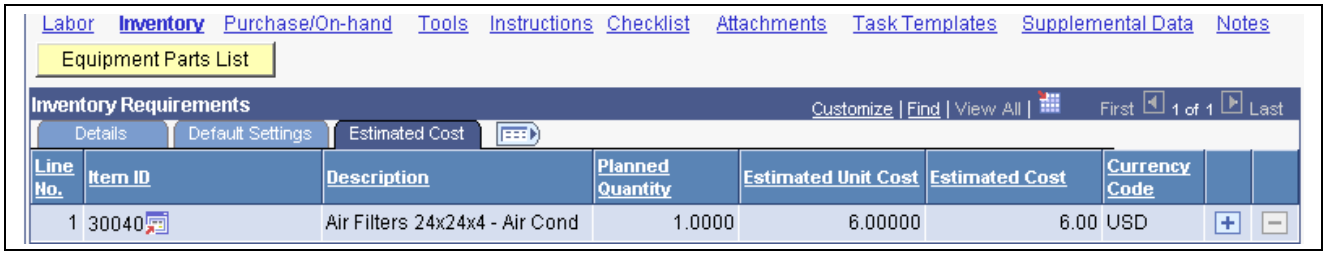
GL Business Unit Displays the GL business unit that is associated with the work order business unit.

Item SetID Display the setID value that is associated with the Inventory business unit specified in the work order business unit's Integration page.

Supplier Reference Supplier reference is only populated if the row was copied from an EPL in which the EPL row had a defined supplier, otherwise it is blank.

Inventory Requirements - Estimated Cost

Select the Estimated Cost tab.



Requirements page - Inventory Requirements, Estimated Cost tab

Estimated Unit Cost Estimated unit cost is derived from the item setup in the PeopleSoft Inventory product. When you save this page, the planned quantity is multiplied by the unit cost associated with the item to arrive at the estimated cost.

Note. The unit cost and estimated cost for floor stock item types are calculated but the calculated amount is not rolled up to the overall estimated requirement cost of the work order.

Identifying Purchase and On-Hand Resource Requirements for a Work Order Task

Access the Purchase/On-Hand Requirements in the Requirements page.

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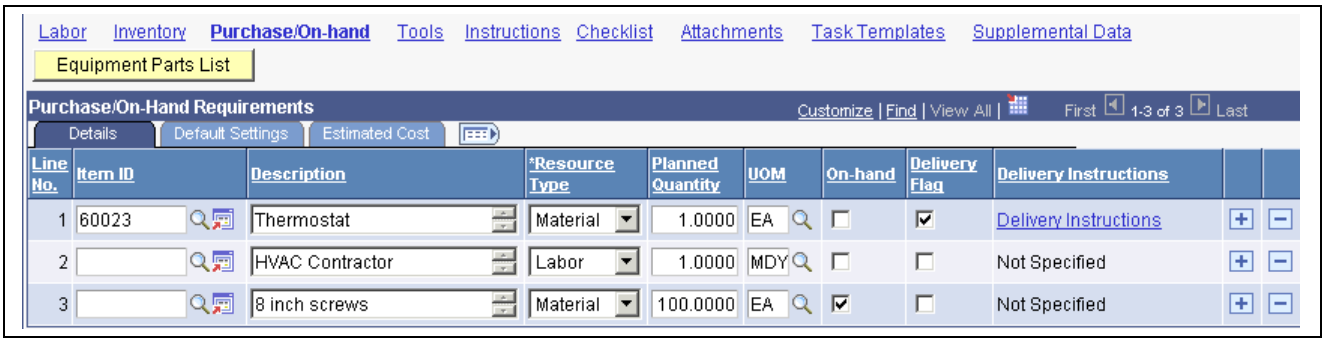

Requirements page - Purchase/On-Hand Requirements, Details tab

Purchase/On-Hand Requirements - Details

Select the Details tab.

Item ID and **Description** — Select a noninventory item from the Item Master table. Noninventory items are those that do not belong to any Inventory business units and are defined on the item master as noninventory. You can also simply add an open description in the Description field for goods and services you need to procure. An item ID is not required.

Resource Type — Select whether the resource is:

- *Labor*

  An example of a labor resource is a contractor.

  Note. You can enable a contractor to enter work order time in the Technician Workbench. However, if a PO is used to procure contract labor for a work order and you have set up the contractor to enter the time, then you must not associate the invoiced costs based on the PO with the work order or the contractor's labor costs will be double-counted.

  If you create a PO for the contractor and want to associate the invoiced costs with the work order, then you should not allow the contractor to enter time in the Technician Workbench.

- *Material*

  An example of a material resource could be a specific part that is not maintained in PeopleSoft Inventory. Also, you can specify open description items, which are materials that do not have an item ID.

- *Tools*

  You may have to purchase or rent a special tool to complete the work order.

Planned Quantity — Enter the quantity that you need to purchase or that you need to identify as on-hand.

On-hand — Select this check box if the selected item is on-hand. The cost of on-hand items are not tracked in PeopleSoft Maintenance Management.

Purchase/On-Hand Requirements - Default Settings

Select the Default Settings tab.

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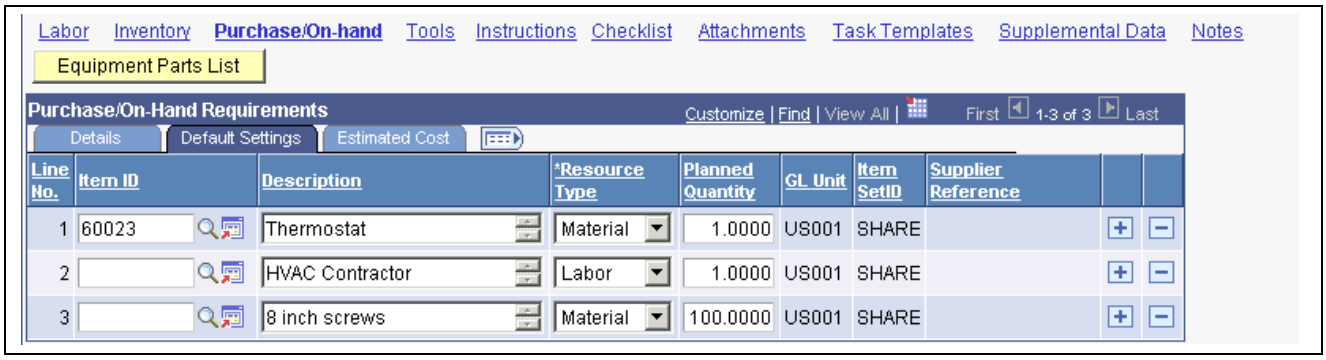


Requirements page - Purchase/On-Hand Requirements, Default Settings tab

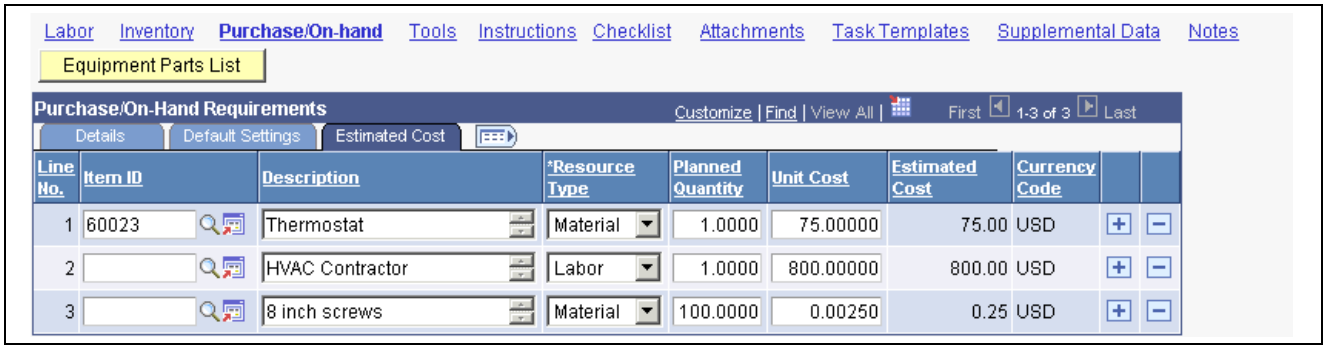
GL Unit Displays GL business unit value associated with the work order business unit.

Item SetID Displays default setID value based on the work order business unit associated with the item table.

See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Defining Items by SetID," Defining Items at the SetID Level.

Purchase/On-Hand Requirements - Estimated Cost

Select the Purchase/On-Hand Requirements - Estimated Cost tab.



Requirements page - Purchase/On-Hand, Estimated Cost tab

Unit Cost Enter a cost per unit, if the resource is not an item selected from the Item Master table. If this is an item selected from the Item Master Table, a default unit cost value appears, if a cost exists, based on the setup of the item. Costs for noninventory items are derived from the PeopleSoft Purchasing Attributes Standard cost in the Item setup component.

Estimated Cost The system multiplies the planned quantity times the unit cost and displays the resulting value in this field.

Defining Tool Resource Requirements for a Work Order Task

Click the Tools link in the Requirements page.

Tool Requirements - Details

Select the Details tab.

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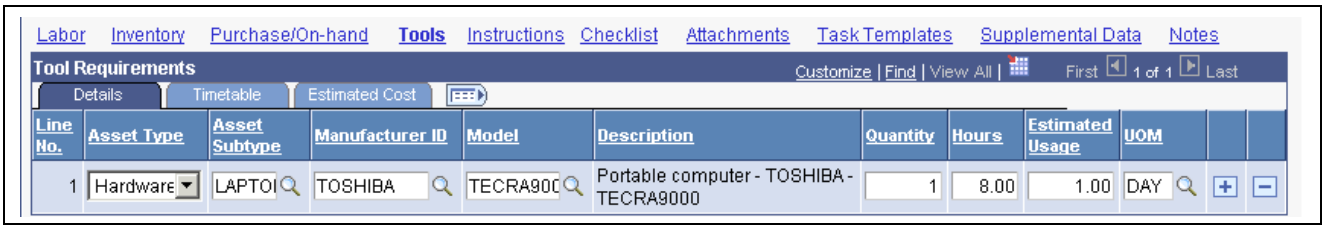


Requirements page - Tool Requirements, Details tab

Asset Type, Asset Subtype, Manufacturer, and **Model** — Select the asset characteristics that identify the type of tool that you want to use to perform this work order task.

Quantity — Enter how many of these tools are needed to perform this work order task.

Hours — Enter the total number of hours you need to use this tool to perform this work order task.

Estimated Usage — Enter the method that is used for calculating the usage of a tool. For example, a truck may be rented out on a per day basis. If a truck is rented for 1 day (estimated usage) at 20.00 USD/ day, the estimated cost would be 20.00 USD, even though it was only used for 2 hours.

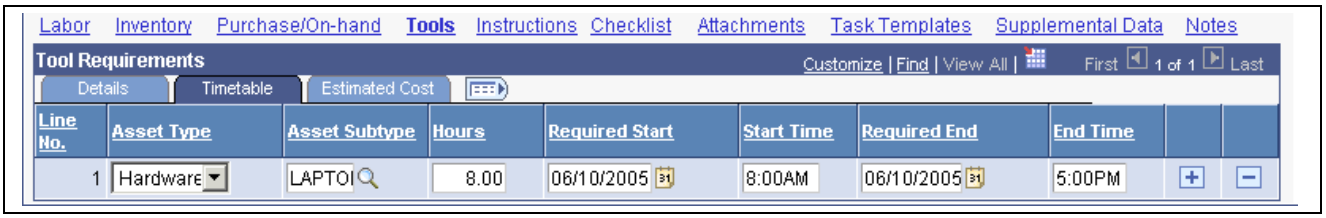
UOM (unit of measure) — The default unit of measure value that determines the usage cost is derived from the shop's tools rate or the asset subtype definition. For example, per day or per week are valid units of measure. If there is a default unit of measure set up, then the unit of measure field is not available for selection. Otherwise, the unit of measure field is blank and available for entry.

Note. This behavior also applies to the Tools Schedule grid on the Schedules page of the work order.

See Chapter 17, "Defining Work Order Task Requirements," Understanding Work Order Task Resource Requirements, page 425.

Tool Requirements - Timetable

Access the Tool Requirements - Timetable grid.



Requirements page - Tool Requirements, Timetable tab

Required Start, Start Time, Required End, and **End Time** — Enter the start and end dates and times for the usage of this tool. The default dates and times are based on the required dates for the work order task.

Tool Requirements - Estimated Cost

Select Estimated Cost tab.

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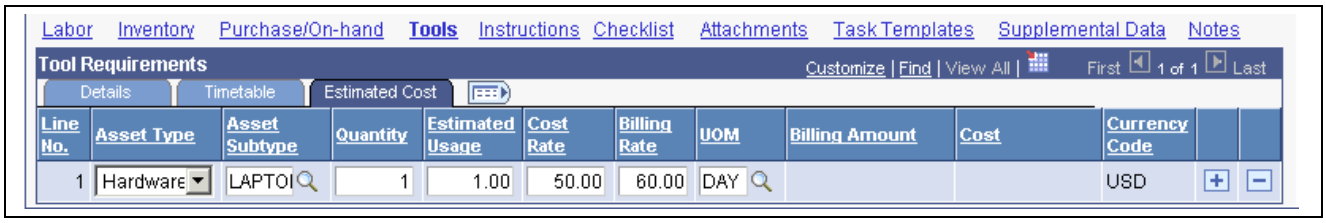

Requirements page - Tool Requirements, Estimated Cost tab

Cost Rate and **Billing Rate**

These default rate values are derived from the rates specified in the Tool Rates page of the shop or the asset subtype page in the PeopleSoft Asset Management. The rate specified at the asset subtype level can be overridden by a rate specified at the shop level.

Billing Amount and **Cost**

Click the Save button to calculate these amounts. The cost and bill rates are multiplied times the tool's estimated usage and the quantity to determine the cost and billing amount.

Important! You can review a summary of the estimated costs for all the task requirements on the Cost page of the work order.

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CHAPTER 18

Scheduling a Work Order

This chapter provides an overview of resource scheduling in Oracle's PeopleSoft Enterprise Maintenance Management and discusses how to:

- Use the Work Order Schedules Page to schedule a work order.
- Schedule labor resources for a work order task.
- Schedule inventory resources for a work order task.
- Schedule purchase/on-hand resources for a work order task.
- Schedule tool resources for a work order task.
- Manage schedules using the Work Order Workbench.

Understanding Resource Scheduling

Once you create a work order and at least one work order task, you have the option of specifying resource requirements and assigning and scheduling these resources for each work order task.

This section discusses:

- Labor resource scheduling.
- Tool resource scheduling.
- Labor and tool resource matching.
- Labor resource assignment approval workflow.
- Move labor or tool resources to Purchase/On-Hand.
- Inventory resource scheduling.
- Inventory item availability.
- Procurement of material, tool, and labor resources using the Purchase/On-Hand Schedules grid.
- The Work Order Workbench.

Labor Resource Scheduling

There are four different methods for scheduling labor resources.

- Select a resource group ID and click the Recommend Labor button on the Schedules page (Labor Schedules) to run the resource match engine, which recommends resources that meet the labor requirements based on both qualifications and availability.

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- Search for the resources based on the craft manually by clicking the Search link in the Labor Schedules - Assignments tab on the Schedules page. This conducts a search based on the availability of the resources and the craft.
- Enter or select a specific employee ID at the resource line level in the Labor Schedules - Assignments tab on the Schedule page.

  Use this method when you know the specific resource whom you want to assign.
- Access the Labor Assignment Workbench and assign available crew resources and non-crew resources to multiple work order tasks.

In each of these methods, the system checks the resource calendar for conflict before making the actual assignment. If a conflict exists and the system allows overbooking of the resource, it creates the assignment and issues a warning message to the user. If you indicated that overbooking is *not* allowed, then the system issues an error message based on the conflict. Once the labor resources are assigned, a distribution row is created in the Labor distribution record in PeopleSoft Maintenance Management. When the actual time spent on the work order task for this schedule row is entered through a timesheet, the Labor distribution row ChartField values will flow into the timesheet that will feed the shared tables with PeopleSoft Payables.

To manually control overbooking of resources at the work order task line, you must select the Overbooking Resources - Require Manual Override check box for the shop associated with the work order. If you select this check box, then an Overbook Flag check box displays in both the Labor Schedules and Tool Schedules grids in the work order. If you select the check box, then the system allows the overbooking of the resource. If the check box is cleared, then the system does not allow the overbooking of the resource. If you do not select the Require Manual Override check box for the shop, then the system automatically allows overbooking of the resource for all work order task lines associated with the shop.

There are two types of shifts that the system considers in the assignment process:

- The shop’s shift, which defines the operating hours of the shop.
- The resource’s shift, which defines the working hours of the resource.

If overbooking is *not* allowed, the system checks the resource availability based on the availability cache record and the resource working hours in the shop. If there is no availability for the scheduled time frame and duration, an error issued. If overbooking is allowed, the system uses either the shift associated with the shop identified in the work order header or the resource shift in the assignment process, depending on one of these scenarios:

- For a cross shop assignment where the resource is assigned to the shop identified in the work order header, the system uses the shift that the resource is assigned to in the shop associated with the work order.
- For a cross shop assignment, where the resource is *not* assigned to the shop identified in the work order header, the system uses the shop’s shift in the assignment process
- For a non-cross shop assignment, the system uses the resource’s shift in the assignment process.

Schedulers can assign non-crew and crew resources one at a time using the Labor Schedules grid or the Labor Assignment Workbench. They can also assign non-crew and crew-scheduled resources to multiple work orders and tasks using the Labor Assignment Workbench. When you set up resources, you can associate them with one or more shops, shifts, and crafts using Manage Profiles. When you access the Shop component, the current shop resources are listed on the Resources page. All resources must be assigned to a shop before you can assign them to a work order task.

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When you click the Search link in the Labor Schedules grid in the work order and access the Search for Labor Resources page, you can search by shop, crew, location, employee ID, craft, and availability. However, you can override the other values, but you cannot override the craft value on this search page. For example, if a crew has three electricians and two mechanics associated with it, and you need three electricians and two mechanics to do the job, then you perform the search based on the crew ID, which results in a list of the three electricians or two mechanics associated with the crew (depending on the craft specified on the search criteria) so that you can assign these resources to the task. If crew technicians are not available in the shop associated with the work order task, the scheduler can search for technicians in another shop or procure technicians using a purchase order or requisition.

The scheduling and assignment of crews to multiple work orders is described in detail in the Performing Crew Scheduling chapter.

See Chapter 19, "Performing Crew Scheduling," page 523.

Tool Resource Scheduling

Scheduling a specific tool asset presumes that the asset is marked as a tool and associated to a shop, able to be scheduled based on its availability, and that the asset is formally reserved or checked out for the time period indicated in the work order task. Tool resource scheduling is basically handled like labor resource scheduling in that you can either have the system recommend a tool, specify criteria and search for tools manually, or select a specific tool on the row in the Tool Schedules grid in the work order.

To schedule a tool, you can:

- Click the Recommend Tools button, which uses the match engine to conduct a search in PeopleSoft Asset Management for an appropriate tool.
- Manually search for a tool by clicking the Search link on the Tool Schedules - Assignments tab to access the Asset Search page and search for the asset based on availability and a variety of criteria.
- Select a specific tool's asset ID in the Tool Schedules - Assignment tab's work order task line, which is based on the assumption that you know that this type of tool is always available.

The system can determine availability for tool resources by examining continuous or discontinuous blocks of time, just as it can for labor resources. Each tool is associated with a shop based on its asset classification parameters (asset type, subtype, manufacturer, model), which are originally defined in PeopleSoft Asset Management. Therefore, the availability of the tools is determined by the operating hours of its associated shop. Tool qualification is determined based on the specification of the asset type, subtype, manufacturer, model, and the Asset Management business unit. When a scheduler clicks the Recommend Tools button to run the Resource Match engine, the system compares the Tool Schedules row specifications to the tool assets that reside in PeopleSoft Asset Management and determines qualification fit score based on the following table:

User Specification of Asset Characteristics in Work Order Task Row	Qualification Fit Score based on Matching Asset Characteristics
Asset Type, Asset Subtype, AM Business Unit	• Matches all characteristics: 100% • Matches only one of the characteristics: 33.33%

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User Specification of Asset Characteristics in Work Order Task Row	Qualification Fit Score based on Matching Asset Characteristics
Asset Type, Asset Subtype, Manufacturer ID, AM Business Unit	• Matches all four characteristics: 100% • Matches two characteristics: 50% • Matches one characteristic: 25%
Asset Type, Asset Subtype, Manufacturing ID, Model, and AM Business Unit	• Matches all five characteristics: 100% • Matches three characteristics: 60% • Matches two characteristics: 40% • Matches one characteristic: 20%

If you cannot find a tool in the asset repository, you can procure the tool by creating a requisition or purchase order directly from PeopleSoft Maintenance Management by clicking the Move Selected to Purchase button or creating a purchase requisition or purchase order directly in the PeopleSoft Purchasing application.

See Chapter 18, "Scheduling a Work Order," Procurement of Material, Labor, and Tool Resources Using the Purchase/On-Hand Schedules Grid, page 464.

Labor and Tool Resource Matching

When you schedule either labor or tools for a work order task in PeopleSoft Maintenance Management, you can click:

- The Recommend Labor button, after clicking the Labor link on the work order's Schedules page.
- The Recommend Tools button, after clicking the Tools link on the work order's Schedules page.

Clicking either of these buttons invokes the Resource Matching engine for either labor or tools resources. The Resource Matching engine:

- Assesses all labor resources based on their availability and qualifications to perform a work order task.
- Assesses all tools resources based on their availability and qualifications for use in a work order task.

The Resource Matching engine evaluates various factors, such as crafts, accomplishments, competencies, experience, and availability to assess how various labor resources in the resource database match with the qualifications specified for a work order task resource. A fit score is calculated based on these factors, which is used to recommend resources for the task.

To use resource matching, you must:

1. Follow the setup procedures for labor and tools.
2. Define and schedule the cache administration processes that will refresh the eligible resources and resource schedules cache and update the search index that will be used in the calculation of the qualification and availability scores.
3. Review and modify the Resource Search, Search Configuration.

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PeopleSoft Maintenance Management Search Types

Before you can use the Resource Match engine to search for and identify labor and tool resources that match your specifications for a technician or a tool in a work order task, your organization needs to decide on the importance of each of the factors used to compile the fit scores. You can do this by accessing the two search types defined specifically for PeopleSoft Maintenance Management in Common Definitions, Resource Search, Search Configuration component. Each search type specifies the Verity search settings and the factors that are used to determine the factor fit score.

The Resource Match engine uses the Verity search engine to quickly calculate the fit scores for labor and tool resources. Verity is a third-party search engine tool licensed by PeopleTools, which executes free-text data searches. The index process extracts information from the specified database and loads it into Verity formatted files on the Process Scheduler server. The Verity indexing application transforms the labor resource or the asset data files into an index that is used for searching.

When you select one of the two PeopleSoft Maintenance Management search types in the Resource Search - Search Configuration component, the two pages in the component include the:

- Verity Settings page.

  You can enter the Buffer Result set Size (in rows) field to specify the number of rows you want returned from the Verity Index.

  You can also specify the number of days to store the resource schedules. For example, if you specify 30 days, the cache administration process will store the resource schedules for 30-day periods in the cache record.

- Factor Weights page.

  You identify the importance you place on each of the qualification factors.

There are two search types predefined for PeopleSoft Maintenance Management, which include:

- WASRC.

  This search type is used to identify assets that are flagged as tools in the asset repository for a work order task. It only uses one factor, configurable fields, which includes ASSET_TYPE, ASSET_SUBTYPE, MANUFACTURER_ID, MODEL, and AM_BU.

- WMSRC.

  This search type is used to identify labor resources for a work order task based on the importance of the weighting of these qualification factors:

  - Accomplishments.

    The Resource Match engine compares resource accomplishments specified for the selected craft in the work order task labor schedule to the accomplishments of the resources included in the search.

  - Configurable fields.

    The configurable fields for WMSRC are CRAFT, SHOP_ID, and BUSINESS_UNIT_WO.

  - Competency proficiency.

    The Resource Match engine compares the competency proficiencies specified for the selected craft in the work order task labor schedule with the competency proficiencies of the resources included in the search.

  - Competency experience.

    The Resource Match engine compares the years of experience specified for the selected craft in the work order task labor schedule with the years of experience of the resources included in the search.

You can specify how important each of these factors is to your organization in terms of finding resources that meet the qualifications necessary to perform a work order task.

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See *Enterprise PeopleTools PeopleBook: Verity Command Line Indexers Reference Guide V5.0 for PeopleSoft.*

Resource Matching Fit Score Calculations

The Resource Match engine requires separate algorithms for each match factor. Fit score calculations for PeopleSoft Maintenance Management are based on the:

- Accomplishment factor.
- Competency Proficiency and Competency Experience factors.
- Configurable fields.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Understanding Resource Matching".

Resource Availability

When the scheduler enters a resource group ID and clicks the Recommend Labor (or Recommend Tools) button, the match engine determines a resource's availability based on a precise calculation. The availability calculation uses the date range and duration of the resource request, the resource's calendar, and the shift associated with the resource. The match engine then determines the resource's availability based on these two calculation methods:

- Continuous availability.

  In certain scenarios, a work order task must be completed in a single block of time. For example, when a work order task requires that production equipment must be brought down to perform the task. In this case, the availability of the resource is 100 percent as long as the resource is available for a continuous time period of at least sixty minutes. If you select the Continuous Scheduling check box for either labor resources or tools, and click the Recommend Labor or Recommend Tools button to run the Resource Match engine, the engine searches for all resources that are available for a continuous time period.

- Discontinuous availability.

  If a resource is available for at least 60 minutes, even though the 60 minutes are not in a continuous time period, the availability is 100 percent. For the Resource Match engine to search for resources with discontinuous availability, you must clear the Continuous Scheduling check box for labor or tool resources.

For example, if an organization needs to schedule twelve hours of work between Monday and Friday, the following table describes the how the availability of the resource is determined based on discontinuous versus continuous availability calculations:

Resource Schedules	Discontinuous Availability Calculation Results	Continuous Availability Calculation Results
Resource #1 works Monday - Friday from 8 a.m. – 12 p.m.	100% available given that this resource can be assigned Monday, Tuesday, and Wednesday from 8 a.m. - 12 p.m.	33% available given that the largest continuous block of time available for this resource is 4 hours out of the 12 hours required.
Resource #2 works Monday - Friday from 8 a.m. - 2 p.m. each day and already is assigned to work on Monday from 8 a.m. to 2 p.m. and is free the rest of the week.	100% available given that this resource can be assigned on Tuesday from 8 a.m. – 2p.m. and on Wednesday from 8 a.m. – 2 p.m. .	50% available given that the largest continuous block of time available for this resource is 6 hours out of the 12 hours required, from 8 a.m. - 2 p.m. on either Tuesday, Wednesday, Thursday, or Friday.

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If conflicts arise in the creation of an assignment and the resources can be overbooked, then PeopleSoft Maintenance Management allows the scheduler to create the assignment and changes the status to assigned. The scheduler receives a message indicating that conflicts exist and that the resource is overbooked. If overbooking is not automatically allowed, then PeopleSoft Maintenance Management issues an error and indicates that the resource does not have enough available hours to perform the assigned task. . The assignments are set to a status of pending approval if assignment workflow is enabled in the Work Order Options component. Once the assignment is approved, the status changes to assigned.

Note. Unless you indicate that overbooking requires manual override in the shop associated with the work order, the system automatically allows overbooking of a resource. Even if overbooking is allowed for a resource, you cannot assign a resource to a date past the work order task's scheduled end date and time.

An assignment status is changed to complete based on the date when the work order task is set to complete and the resource's calendar is updated based on the Update Resource Calendar option specified at the shop and business unit level. The labor resource's work history is updated only if the Update Work History check box on the resource schedule grid is selected in the row when the assignment is created. If an assignment is canceled as of a specified date, the system deletes the current and future entries on the resource's calendar and the removes the assignment from the resource's work history in the resource profile.

Example 1:

For example, a work order task (WO 2 /Task 1) is scheduled from 10:00 a.m., January 3, 2005, to 05:00 p.m., January 4, 2005, and the duration is 10 hours.

John Doe works shift form 8:00 a.m. - 12:00 am and 1:00 p.m. to 5 p.m. with an hour off for lunch from noon to 1:00 p.m. John is free all day from 01/03/2005 - 01/04/2005. He is scheduled to other tasks for the rest of the week. The scheduler wants to schedule John to WO2, Task 1 and creates these assignments for John:

Date	Time	WO/Task
1/03/2005	10 a.m. - 12 p.m. (2 hrs)	WO2/ Task 1
1/03/2005	1 p.m. - 5 p.m. (4 hrs)	WO2/ Task 1
1/04/2005	8 a.m. - 12 p.m. (4 hrs)	WO2/ Task 1

Example 2:

The scheduler wants to assign Jennifer Brown to WO2 – Task 2 for a duration of 16 hours on 1/3/2005 and 1/4/2005. Jennifer's shift is 8:00 a.m. to 12:00 noon , lunch from 12:00 noon - 1:00 p.m. and 1:00 p.m. - 5:00 p.m. Jennifer has already been scheduled from 10:00 a.m. - 12 noon on 1/3/05 to another task. She also is scheduled to other tasks for all of 1/5/06, 1/6/06, 1/7/06. The scheduler assigns Jennifer to:

Date	Time	WO/Task
1/03/2005	8 a.m. - 12 p.m. (4 hrs)	WO2/ Task 2
1/03/2005	1 p.m. - 5 p.m. (4 hrs)	WO2/ Task 2
1/04/2005	8 a.m. - 12 p.m. (4 hrs)	WO2/ Task 2
1/04/2005	1 p.m. - 5 p.m. (4 hrs)	WO2/Task 2

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Since Jennifer is already assigned to work on a different task on January 3, 2005, from 10:00 a.m. - 12:00 p.m. If overbooking is not allowed, the scheduler will receive an error message that Jennifer is already assigned to a task on 1/3/2005 from 10 a.m. - 12:00 p.m. and the assignment will not be created. If overbooking is allowed, the scheduler will receive a warning message stating that the assignment has been created with a conflict, but the assignments will be created.

Note. The system updates the resource scheduled start and end dates and times based on the work order task start and end dates listed for the previous scenario.

The system also creates an assignment exception based on Scenario 1 indicating: From Date: January 2, 2005 and To Date: January 2, 2005, Hours: 1, Start Time: 12:00 p.m.

The system updates John Doe's calendar with the task assignment.

In another example, a work order task requires a resource from September 16, 2004 09:00 a.m. – September 16, 2004 1:00 p.m. (Duration = 4 hours).

Whether the task is continuous or discontinuous, if overbooking is allowed, the system does not consider the available date ranges returned. Instead it creates the assignment provided that the resource works enough hours between the scheduled start date and time and the scheduled end date and time based on the resource's shift. If overbooking the resource is not allowed and the resource is not 100% available, the system issues an error and creates no assignments.

The Overall Fit Score

After the matching process calculates an overall fit score by taking into consideration each match factor, it calculates factor family fit scores by applying the relative factor importance settings in the Search Configuration's Factor Weights page. Finally, the process averages the family scores according to the relative factor family preferences that are selected during search time. This overall fit score is not visible to end users.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Understanding Resource Matching".

Labor Resource Assignment Approval Workflow

Schedulers can assign technicians, who are associated with a shop (SHOP B), which is different from the shop (SHOP A) associated with the work order. However, the resource's supervisor must approve the assignment, if the assignment approval is turned on in the Work Order Options component. The technician's supervisor is identified in the technician's employee data file. You can set up email notifications on the Work Order Options page for both the supervisor and the resource, which are triggered based on a selected assignment status. The employee's supervisor (from SHOP B) can access the worklist from the Worklist link located on the top right-hand corner of the browser and approve or reject the assignment. The supervisor can click a link in the worklist to access the Assignment Approval page for a work order resource. If the supervisor approves the assignment of this technician, then the assignment status changes to assigned. If the supervisor rejects the assignment, then the assignment status changes to rejected. Once a technician from a different shop is assigned to a work order task, the cost and bill rates for the technician are based on the rates set up in the shop associated with the work order and not the shop to which the technician is associated.

Note. If assignment approval is required , the cross shop assignment approval applies to the cross shop assignment of resources assigned to crews (crew members) on the Labor Assignment Workbench.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Workflow Technology.*

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Move Labor or Tool Resources to Purchase/On Hand

The scheduler can click the Move Selected to Purchase button above the Labor Schedules grid and above the Tools Schedules grid to send a selected resource to the Purchase/On Hand grid. When the scheduler selects the resource that requires procurement, such as a special tool, and clicks the Move Selected to Purchase button, the tool row is no longer available for selection in the Tool Schedules grid and now appears in the Purchase/On-Hand Schedules grid. The scheduler then selects the tool in the Purchase/On-Hand Schedules grid and creates a requisition or PO to purchase the tool. Once the tool is procured, the status of the tool in the Tool Schedules row changes to procured. The Move Selected to Purchase button works the same way for a selected labor resource and is often used when contract labor is needed for a task.

Inventory Resource Scheduling

After creating a work order and work order tasks, you can schedule Inventory materials for use in performing a work order task. You do this by accessing the Inventory Schedules grid on the work order's Schedules page. You can populate the Inventory Schedules grid with materials or parts by:

- Copying the requirements from the Inventory Requirements grid that you specified either manually or that you copied from a work order task template.
- Selecting the EPL button to access Equipment Parts List Selection page where you can select among multiple EPL templates, if available, listed in descending order of applicability that match the target asset's classification criteria (asset type, subtype, manufacturer ID and model). You select the parts associated with each template that you want to copy to the tasks. The first template in the list of EPL templates is identified as the preferred template and is preselected. However, you can select any of the listed templates and the parts will appear in the lower grid. . If only one template is listed, it is preselected, and the template information along with the parts from that template appear on the grid.

  Each EPL template is set up in PeopleSoft Asset Management.

  Note. The Equipment Parts List button is only active if the asset for the task has an associated EPL and there are Inventory items applicable to the Inventory business unit that is defined for the work order business unit.

  You can select inventory parts from the EPL when you define inventory requirements for a work order task template.

  See Chapter 9, "Defining Work Order Templates," page 239.
- Entering the parts manually.

Once the inventory items (parts) are entered on the Inventory Schedules grid, the typical steps to obtain the items to complete a task are:

- Commit the items, which recognizes the work order demand for the items in PeopleSoft Inventory by applying a commit rule set up in the work order business unit, shop, or the Type page of the shop.
- Soft reserve the items, based on the combination of commit rules and reservation rules in PeopleSoft Maintenance Management, which prevent the work order task demand from being consumed by other demand lines.

  Note. You can check the availability of the items based on their need date on the Inventory Schedules - Availability tab.

- Generate a pick plan, which lists the work order items and the inventory locations from which they should be picked.
- Issue the material (items) from PeopleSoft Inventory to the work order.

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- Return any unused material to PeopleSoft Inventory.

To schedule inventory, the Inventory Schedules page consists of:

- The Inventory Schedules - Materials tab is where a scheduler can search for and select an Inventory item from the Item Master.

  This field may already be populated if you copied the Inventory requirements or selected the item from the Equipment Parts List, if available. The unit of measure (UOM) is derived from the Inventory STD UOM (standard units of measure) for the selected item. The scheduler can override the UOM and change it to an ordering UOM that is predefined in the Items, Define Items and Attributes, Units of Measure component. The scheduler enters the quantity needed for the task and the date that it is needed. Once the item is committed, which means that PeopleSoft Inventory recognizes the work order task demand, the item ID and UOM are both disabled. However, you can still update the quantity needed and the date needed. These fields are no longer available once the item is added to a picking plan. The planned quantity only displays if this item was copied from the Inventory requirements and is informational only.

  Items have many attributes, one of which is the ability to define an item as *Floor Stock*. If an item type of *Floor Stock* is used in the Inventory Schedules grid, the item is assumed on-hand in the shop and is not issued from PeopleSoft Inventory. The Item Type in the grid populates automatically as either *Inventory* or *Floor Stock* when selecting an item in the Inventory row. Floor Stock may include bolts, nuts, gloves, rags and other low valued items that you do not need to track. You typically replenish these items in your shop using a visual method. Once the stock becomes low, you can issue more from PeopleSoft Inventory using Express Issue in PeopleSoft Inventory.

- The Inventory Schedules - Details tab provides more information on the state and status of the inventory item or items that the work order task requires.

  This tab shows whether the item was committed to PeopleSoft Inventory, if the item exists on a picking plan, if any quantities have been issued to the work order for the item, the current quantity available in PeopleSoft Inventory, the pegging status, and links to the pegging workbench and pegging inquiry, if pegging is enabled.

- The Inventory Schedules - Reservation tab works in conjunction with a selected combination of commit and reservation rules established in the work order business unit or in the shop to determine when the system will commit and reserve inventory items in PeopleSoft Inventory.

  Some of the information on this tab is updated automatically when the system applies the selected commit and reservation rules to the inventory items at the task line. You can, however, override the system rules for a user, if you select the Authorized to Reserve Inventory check box on the User Preferences - Maintenance Management page. Selecting this check box displays the Reserve button on the Inventory Schedules page. When you select this Reserve button , the system overrides the commit and reservation rules and immediately commits the item if not already committed, and attempts to reserve the item. If the quantity cannot be fully reserved, reservation messages are generated. You can view these messages on the Reservations Errors page. The value in the Priority field on this grid, is derived from the set up in either the work order business unit, shop, or work order type in the shop. The Priority field is used to determine the order in which demand is reserved.

- The Inventory Schedules - Availability tab provides information to help determine whether the current quantity of an item will be available on a scheduled needed date.

  After selecting one or more inventory items in a task, you click the Item Availability button and the system determines if the scheduled quantity will be available on the scheduled need date. The system also updates the Earliest Available date, indicates with *Yes* or *No* whether the selected number of items are available in the Item Availability column, and updates the Need Date Qty Available column with the number of items available on the date that you specified the items were needed for the task.

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You can click on an Availability Inquiry link for a selected item, which takes you to the Inventory, Manage Inventory, Review Inventory Balance Info, Item/Product Availability page in PeopleSoft Inventory. This inquiry lists the available quantity as of a specific date and the total quantity demand and the total quantity supply for the selected item.

You can click on the Balance Inquiry link which takes you to the Inventory, Manage Inventory, Review Inventory Balance Info, Item Balance by Unit page in PeopleSoft Inventory. This inquiry displays a description of the item, the quantity on hand, the quantity owned, the quantity available, the quantity reserved, and the number of lead days required to replenish the quantity based on a specific business unit. A history listing the dates of the last adjustment, the last putaway, the last order date, and the amount of the last order displays on this page. You can click a link to access the Item Balance By All Units inquiry, Item Balance By Location inquiry, and Item Fulfillment Status inquiry.

The Item Balance By All Units inquiry displays the quantity available, quantity reserved, quantity in transit, and the quantity on hand of an item based on each business unit. There are also total quantities for all of the business units.

The Item Balance By Location inquiry displays the area and levels where the item is located, whether the item quantity is nettable, the quantity reserved, the quantity stored, the quantity reserved base amount, and the quantity storage base amount for each location of the item in a storage facility. It also lists the total amount stored in each of the storage locations and the total amount that is staged for shipping.

The Item Fulfillment Status inquiry displays the status of fulfilling the demand for an item if the demand was placed on the item based on a material request, material return, a planning requisition, a purchasing requisition, or a sales order. This page may indicate whether the fulfillment of the item is on hold, or if the request was fulfilled, it contains detailed shipping information.

- The Inventory Schedules - Additional Information tab further assists the work order task scheduler with information to make better planning and scheduling decisions.

  This tab enables you to specify if any delivery requirements exist for the given item. If the item is serial or lot controlled and quantities are issued to the PeopleSoft Inventory row, you can click a link to review the serial or lot numbers associated with the item. Based upon quantities available and earliest available date information, the scheduler can better determine the most appropriate work order task start and end dates for the inventory schedule.

  See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Inquiring and Reporting About On-Hand Stock,” Understanding On-Hand Inventory Reporting and *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Monitoring Inventory Quantity Balances,” Confirming Quantity Data with Inventory Balance Audit Reports.

- The Inventory Scheduling - Default Settings tab displays the Inventory business unit, the GL business unit, and the item’s setID.

  These are all default values that depend on how you set up them up in the work order business unit.

  The Transaction Source field on this tab identifies the source of the inventory transaction and determines whether the transactions are considered Scheduled or Actuals. If a transaction source is Scheduled, the total scheduled costs appear on the Cost page of the work order. If a transaction source is Actuals, you must run the Cost Summarization process to view the total actual costs on the Cost page of the work order. When Actuals is returned from a feeder application such as a direct issue from PeopleSoft Inventory, the Scheduled Quantity field on the Inventory Schedules - Materials tab is populated with a value of zero and:

  - The system will not calculate the scheduled costs for the row or rows that are inserted by the feeder application.
  - The costs will not roll up to the task’s scheduled costs on the Cost page in the Work Order component for that inventory resource.
  - Changes to the rows are prevented if entered from another application.

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- The Inventory Scheduling - Cost tab displays the estimated unit cost and the scheduled material cost.

  The unit cost is derived from PeopleSoft Inventory and the scheduled material cost is calculated based on the quantity times the unit cost. Both of these fields are display only. The UOM is calculated using the Ordering Conversion rule in PeopleSoft Inventory. An example of applying the conversion rate is: 1 BOX = 4 EA.; 1 EA unit cost = 1.00 USD; therefore 1 BOX unit cost = 4.00 USD. If the work order parts row needs 2 boxes then the Scheduled Material Cost (extended cost in PeopleSoft Inventory) = 8.00 USD.

- The Inventory Scheduling - Distributions tab enables you to access the distribution data specified for the row after an assignment has been made.

  You can override these values. You must select the View and Update Accounting check box on the User Preferences - Maintenance Management page for this link to appear on the tab.

See *PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook*, "Establishing Asset Processing," Setting Up Equipment Parts Lists.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Monitoring Inventory Quantity Balances," Confirming Quantity Data with Inventory Balance Audit Reports.

Inventory Commitment and Reservation

To reserve items in PeopleSoft Inventory, they must be committed prior to or at the same time they are reserved. When the system commits an item specified in a work order task in PeopleSoft Inventory, the item is placed in the IN_DEMAND table based on the work order task's commit rule. This means that PeopleSoft Inventory recognizes the work order task demand.

Only soft reserved items can be reserved for work orders. When the system reserves (soft reserves) an item in PeopleSoft Inventory, part of the Inventory business unit's total available quantity for the item is reserved for the demand line and cannot be consumed by other demand lines, which are staged for fulfillment processing in the PeopleSoft Inventory system. There are two primary locations for setting soft reserve in PeopleSoft Inventory:

- Setup Fulfillment at the Inventory business unit level .
- Setup Item Fulfillment at the item level.

You can reserve items associated with a work order task in PeopleSoft Inventory by:

- Entering the data in the Inventory Schedules grid and saving the work order.
- Clicking the Reserve button on the Schedules page of the work order.
- Running the Reserve Materials process in PeopleSoft Inventory.
- Using the Shortage Workbench in PeopleSoft Inventory.
- Receiving a pegged work order row in PeopleSoft Inventory.

Details about committing items to PeopleSoft Inventory and the methods listed above for reserving work order items in PeopleSoft Inventory are noted in the following this section.

Inventory Commitment

The Commit field on the Inventory Scheduling - Details tab indicates whether the selected item is committed, which means that PeopleSoft Inventory recognizes the work order task demand. The work order demand appears in the Item Availability Inquiry and can be optionally included when running the Create Replenishment Requests for items that are below their reorder point. You specify the point at which items are committed to PeopleSoft Inventory on the Integration page of the work order business unit, on the Shop Definition page, and on the Type page of the shop. You select a commit rule, which indicates that you want to commit the inventory items based on:

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- The addition of an item to the parts list in Inventory Schedules grid.

  Items are committed when they have been added to the Inventory Schedules grid and a save has been issued. Each subsequent part that is added and saved on the work order task will commit the item to PeopleSoft Inventory.

- A change to a specified work order task status.

  Once the work order task status changes to the status identified in the Integration page of the work order business unit or defined at the shop level, the item is committed.

Note. The valid internal statuses to choose from are *Awaiting Schedule*, *Scheduled*, and *Work in Progress*.

- The creation of a picking plan.

  A picking plan consists of the parts or inventory items that are added to a list, which direct inventory personnel to the storage locations for the items that they need to pick for the work order task. This option delays committing of the inventory items until you are ready to have them picked and available to begin working the work order. You can set up and generate a pick list from the Inventory Schedules page or the Technician Workbench of the work order:

  See Chapter 18, "Scheduling a Work Order," Setting Up a Pick Plan, page 487.

- When the item is reserved (Commit at Reserve).

  To reserve inventory items, they must be committed prior to or at the same time that they are reserved. The reservation rules are set up to work in conjunction with each of the commit rules. When a commit rule is selected, the system commits the item based on the commit rule and reserves the item based on the selection of one the following reservation rules:

  - Batch Reserve Only.
  - Parts List Creation.
  - Pick Plan Creation.
  - Status Change to Awaiting Schedule, Scheduled, or Work in Progress.

  There are specific combinations of commit and reserve rules that are compatible. The system runs a combination edit to verify that the combination of the Commit Rule and the Reservation Rule is correct.

  See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Work Order Business Unit Integration Options, page 88.

  See Chapter 18, "Scheduling a Work Order," Defining the Inventory Schedules Reservation Tab, page 493.

Work order commit statuses are:

- Not committed.

  The Inventory Schedules row has *not* yet placed demand on Inventory (inserted the row into the IN_DEMAND table in PeopleSoft Inventory).

- Committed.

  The Inventory Schedules row *has* placed demand on PeopleSoft Inventory (inserted the row into IN_DEMAND table in PeopleSoft Inventory).

When Inventory items are committed to Inventory, a row is created in the Inventory primary table (IN_DEMAND) with the DEMAND_SOURCE value set to WM, which means that the committed rows in PeopleSoft Maintenance Management are recognized by PeopleSoft Inventory as demand. The uncommitted rows in PeopleSoft Maintenance Management are not visible to PeopleSoft Inventory.

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See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Promising and Reserving Inventory," Using the Fulfillment Workbench to Reserve or Promise Orders.

See Chapter 4, "Understanding Integrated and Shared Products Setup Considerations," page 57 and Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

Reserving Inventory Using the Work Order's Inventory Schedules Grid

You can reserve work order task items in Inventory from the Schedules page - Inventory Schedules in PeopleSoft Maintenance Management. You set up a combination of commit and reservation rules on the Integration page of the work order business unit, on the Shop Definition page, or on the Type page of the shop where the rules are set up based on the work order type. Standard PeopleSoft Maintenance Management default hierarchies apply to these rules, with the business unit at the top of the hierarchy and the work order type at the bottom. The system uses these rules to automatically commit and reserve the inventory item specified at the task line.

To reserve inventory items, the items must be committed either before they are reserved or at the same time they are reserved. PeopleSoft Maintenance Management performs combination edits to ensure that invalid combinations of the commit and reservation rules do not occur. For example, if the commit rule is pick plan and the reservation rule is parts list, the rules in this combination conflict with each other because the attempt to reserve items precedes the attempt to commit the items.

Once you save the work order, the system executes the reservation rule in PeopleSoft Maintenance Management if the reserve rule is parts list or status change, which triggers the reservation process in PeopleSoft Inventory. If PeopleSoft Inventory cannot fully reserve task rows from PeopleSoft Maintenance Management, it sends a message back to PeopleSoft Maintenance Management explaining why the full reserve cannot take place.

The work order reservation rules are:

- Batch Reserve Only

  When the batch process is run, the rows will be reserved.

- Parts List Creation

  When the parts (items) in the work order task are saved, the parts (items) are reserved.

- Pick Plan Creation

  When the picking plan is created, the part (item) is reserved.

- Work Order Status Change

  When the status of the work order task is changed to *Awaiting Schedule,Scheduled, or Work in Progress,* the parts (items) are reserved.

Selecting the Reserve Button on the Work Order Schedules Page

You can authorize specific users to override the commit and reserve rules specified in the business unit, shop, or Type page of the shop, and reserve inventory items immediately by selecting the Authorized to Reserve Inventory check box on User Preferences - Maintenance Management page.

If the user is authorized, the Reserve button displays on the Inventory Schedules page, which the user can click to reserve the items. When you select this button it will commit any items that are not committed and reserve those items, ignoring any established commit and reserve rules.

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Running the Inventory Reserve Materials Process

This process will attempt to reserve or re-reserve work order task items based on their respective reserve rule. This process may also commit work order task items to PeopleSoft Inventory if the commit rule is the same as the reserve rule. Work order task item rows, which are associated with a commit rule other than *Commit at Reserve* are picked up only if they were previously committed. If the work order task item rows are associated with the reserve rule *Parts List* or *Status Change* (where the task status is greater than or equal to the status selected for the reserve rule), the Reserve Materials process will reserve these items. The Reserve Materials process enables you to reserve multiple work orders at a time. It also can apportion the limited supply to the various demands based on the priority rules.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Promising and Reserving Inventory," Understanding Work Orders.

The Shortage Workbench

Use the Shortage Workbench to reserve and unreserve stock to work order demand lines. You can click the Shortage Workbench link to access Inventory, Fulfill Stock Orders, Shortage Workbench in PeopleSoft Inventory. Based on the search criteria that you enter, you can use the Shortage Workbench to view just the work order demand lines that have attempted reservations and have reserved no stock or only partially reserved stock. This enables you to focus on shortages and determine how to reserve the stock.

You can use the Shortage Workbench to adjust reservations to the highest priority demand. You can also use the Shortage Workbench to deallocate a quantity of stock from a pegged receipt.

Using the Shortage Workbench template enables you to require that any user who unreserves stock on a work order demand line enter a reason code. The Shortage Workbench issues notifications to planners and schedulers when a user unreserves stock from a work order.

The rules that apply to the Shortage Workbench for work orders are defined in the PeopleSoft Inventory PeopleBook: "Fulfilling Work Orders from PeopleSoft Maintenance Management".

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management," Understanding Work Order Item Fulfillment from PeopleSoft Inventory.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Utilizing the Fulfillment Engine," Handling Errors with the Fulfillment Engine.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Managing Stock Shortages," Using the Shortage Workbench.

Pegging Inventory Supply to Work Order Demand

Pegging can be used to associate specific supply, using a purchase requisition or purchase order, to work order demand. This essentially reserves the supply for that specific work order. Users can review the inquiry to see if the supply is pegged and the work order to which it is pegged.

When items are in short supply, organizations peg higher priority work order demand to specific supply to ensure that those demands are satisfied. This also enables the organization to more accurately schedule work orders.

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When the level of inventory items reaches a reorder point, this triggers the generation of a requisition or purchase order in PeopleSoft Purchasing to replenish the supply. When a scheduler needs one or more inventory items for a work order that are not currently available, the scheduler can access the Pegging Workbench from the Inventory Schedules - Details tab and link the demand for the Inventory item based on the work order to the incoming supply identified in the requisition or purchase order. Pegging essentially reserves the incoming supply to the work order. If an item is pegged and is a soft reserve item , then the pegged receipt is reserved when putaway is performed. In addition, if the allocate soft pegs is set to Yes, the pegged receipt will be allocated when putaway is performed. The allocate soft pegs setting is defined in Inventory, Order Pegging, Business Unit Setup or Inventory, Order Pegging, Item Setup.

Once an item is pegged, the quantity scheduled in the Inventory Schedules grid is unavailable for selection until you save the page. The quantity pegged for the work order can be issued to the technician or delivered to the work order job location using the Issue to Work Order command in PeopleSoft Inventory when the items are received. You can access the Pegging Inquiry to follow a pegged item's progress.

If pegging notification is enabled, a notification is generated indicating that the item for the work order has been received. If the email option is enabled, the work order contact receives an email indicating that the materials are now available. The item is put away into PeopleSoft Inventory and can then be issued to the work order.

Important! The pegging workbench is available in the work order only if pegging security is set up for the user in Inventory, Order Pegging, User Security.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management," Understanding Work Order Item Fulfillment from PeopleSoft Inventory.

Issue Inventory to a Work Order With or Without a Pick Plan

Inventory is issued by creating a picking plan or when the inventory clerk accesses the work order and issues the inventory items to the work order without a picking plan. The clerk can update the quantity issued, which in turn updates the work order.

The pick plan process is a batch process, which is owned by Inventory, lists the items and quantities required for a particular work order. The process runs a PeopleSoft Inventory allocation process and generates the picking plan. The Allocation process determines the locations from which the various items of the work order materials list can be picked. The picking plan is a hard copy document, which an inventory clerk can print or a technician can print and carry to the inventory counter. Once you create the picking plan, the inventory clerk must run the issue command to issue the parts to the work order. The picking plan process enables an inventory clerk to obtain the list of needed materials and begin the process of physically pulling the items for the work order. The inventory material need date is the date that the pick plan uses to place items on the pick plan. When the items are picked and issued, the work order inventory item lines are updated to indicate the quantity issued.

An allocation process runs in PeopleSoft Inventory that hard allocates items at the location level. A hard allocation increases the quantity reserved in PeopleSoft Inventory for a location. If the business unit is flagged for a soft reserve, the quantity is reserved at the business unit/ item level, which increases the quantity reserved and decreases the quantity available.

A work order can schedule materials that are due on various dates. The picking plan enables you to indicate to the clerk, to pick the material on specific dates, based on a certain number of lead days. All of the material with a scheduled due date that is equal to and prior to the date specified in the pick plan will be included. Because picking the materials on line in real time is not desirable in this instance, you can run a batch process that looks for start date of the work order and generates a pick plan based on this date.

You cannot delete scheduled materials if they are on a pick plan or if they were issued.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Picking Inventory," Understanding the Picking Process.

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See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management," Issuing Items to a Work Order.

Inventory Demand and Work Order Task Completion

If during the execution of a work order it is determined that the issued quantity satisfies the work order demand and there are still additional unfulfilled quantities (scheduled qty – issued qty > 0) in the row, users can decrease the scheduled quantity, which reduces the demand on PeopleSoft Inventory. When a work order's status is changed to *Complete*, the fulfillment status of the IN_DEMAND row changes to *Depleted* in PeopleSoft Inventory. Any unfulfilled item quantities are no longer seen as demand in PeopleSoft Inventory.

There are certain situations where you cannot change the work order's task status to *Closed, Canceled, or Complete*:

- If any rows in the Inventory Schedules grid have an open peg, which means the items have been pegged to an incoming supply (requisition, PO or Interunit Stock Request) and the quantity has not been received yet.
- If any rows (parts) in the Inventory Schedules grid are on a picking plan.

Note. If neither of these situations apply and there is some quantity left to be issued, a message displays, which asks if you want to complete the work order task. If you respond with No, the task status will not change to *Complete*. If you respond with *Yes*, the system puts the remaining unissued quantity back into PeopleSoft Inventory.

- In some cases you may have partial issued quantities at the time you want to complete a task. If you have no quantities or partial quantities issued, you will be prompted to answer *Yes* or *No* prior to changing the work order task status to *Complete.* If you select *No*, then the work order task status is not set to complete and any unfulfilled demand stays in PeopleSoft Inventory for later issue. If you select *Yes,* then any remaining demand in PeopleSoft Inventory is released and the fulfillment status of the IN_DEMAND row changes to Depleted.

Reorder and Replenishment of an Inventory Item

PeopleSoft Inventory has reorder thresholds, and once reached, these thresholds trigger the generation of a purchase requisition, which replenishes the stock levels for the item. PeopleSoft Inventory also has a replenishment option, Demand Quantity, that can be used to trigger replenishment when the available quantity is less than the work order demand for the item. However, you may also trigger replenishment even if there is available quantity for the work order demand so that there will be a sufficient quantity of specific items available for use in future work orders.

You can access Item Availability and Item Balance by Unit inquiries in PeopleSoft Inventory from the Inventory Schedule - Additional Information tab.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Replenishing Inventory," Understanding Inventory Replenishment Processing.

Inventory Item Availability

Planners and schedulers can determine if an inventory is available for a work order task on a specific date by selecting the Item Availability button and reviewing the results on the Availability tab of the Inventory grid.

Note. You also can determine the availability of noninventory items that you want to procure for a work order task by accessing the Purchase/On-Hand Schedules grid.

See Chapter 18, "Scheduling a Work Order," Scheduling Purchase/On-Hand Resources for a Work Order Task, page 501.

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This enables scheduling a work order task start date with greater accuracy. There are different methods for checking the availability of an item:

- Clicking the Item Availability button on the Schedules page of the work order, which displays the item availability information for the selected inventory rows on the Inventory Schedules - Availability tab.
- Selecting the Availability Inquiry link on the Inventory Schedules - Availability tab, which provides visibility of item quantities and a time-phased supply and demand picture.
- Selecting the Balance Inquiry link on the Inventory, which provides visibility of Item Quantities such as on hand, available and reserved
- Reviewing reserved, issued, and current available quantity balances on the Inventory Schedule - Availability tab.

The Item Availability button for inventory enables you to determine the availability based on the scheduled need date. This button appears above the Inventory Schedules grid and the Purchase/On-Hand Schedules grid on the work order. You must select one or more inventory rows prior to clicking the Item Availability button. When you click this button, the system displays *Yes* if there is enough supply of the item available in PeopleSoft Inventory to meet the task row's demand on the specified date. The system displays *No* if it will not be available. If the item is not available, you can navigate to a page that displays the reasons why the item is not available. Clicking the Item Availability button for inventory items also returns the quantity available on the schedule need date and the earliest date that the quantity will be available.

PeopleSoft Inventory determines the information that displays for a row on the Inventory Schedules - Availability tab based on the following criteria:

- If the quantity is reserved in PeopleSoft Inventory, the reserved portion is considered available on the current date.
- If the current quantity available is less than zero, PeopleSoft Inventory cannot determine if the reserved quantity will be available on the request date and the system displays No on the Availability tab.
- If the quantity is pegged, the quantity will be available as long as the pegged quantity is received on or prior to the schedule need date.
- If the work order is pegged to a requisition that has a blank due date, there is no way to determine when that quantity will be available.
- If quantity is not reserved or pegged, the system determines if there will be enough quantity available in PeopleSoft Inventory on the schedule need date.

The system includes any incoming supply to PeopleSoft Inventory (from requisitions, purchase orders and interunit MSR receipts) and any existing demand in PeopleSoft Inventory (from work orders, sales orders, internal MSR, manufacturing production, interunit MSR shipments) and time phases these entries based on the due date to determine how much quantity will be available on the work orders schedule need date. Supply quantities that are due on or before the work order's schedule need date are added to the current available quantity. Demand quantities due on or before the work order's schedule need date are subtracted from the current available quantity. The resulting available quantity is compared against the quantity needed by the work order. If the quantity needed by the work order is less than or equal to the available quantity then the system displays a *Yes* in the field on the Inventory Schedules - Availability tab. If either the reserved portion, pegged portion or inventory portion of the requested quantity is not available, then *No* displays in the field on the Inventory Schedules - Availability tab. The No value appears as a link that you can select to access the Item Availability page, which lists the reasons why the item is not available. The calculated quantity available displays in the Need Date Qty Available field on the Inventory Schedules - Availability tab.

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Note. The Need Date Qty Available field does not include quantity that is already reserved for the work order and pegged supply. A work order that is fully reserved can have *Yes* in the Item Availability if the date in the Need Date Qty Available amount is less than the scheduled quantity of the work order. A work order that has quantity pegged can also have *Yes* in the Item Availability Field and the Need Date Qty Available amount is less than the scheduled quantity of the work order.

Clicking the Item Availability button also determines the earliest available date on the grid. If the item is available on the schedule need date, the system checks to see if that quantity is available on an earlier date. If the item is not available on the schedule need date, the system determines the next date in the future that the quantity will be available. The system leaves the Earliest Avail Date field blank if there is no future date in which there is enough supply to cover the requested quantity, or if you have quantity reserved and the current available quantity is less than zero. The earliest available date quantity represents the maximum reserved portion, pegged portion, and inventory portion. The Earliest Avail Date field will be blank if the reserved, pegged or inventory portions return are blank. If quantity is partially reserved in PeopleSoft Inventory, then the remaining quantity can be partially pegged and the earliest available date quantity would be the maximum reserved portion, pegged portion, and inventory portion. If no quantity exists for any portion, the Earliest Avail Date field will be blank for partially reserved items.

Note. The system uses the Setup Fulfillment rules in PeopleSoft Inventory to determine the supply and demand rows to include in the Item Availability calculations.

An example of the calculations that occur when there is *not* enough quantity available:

Current Available:	Demand from PeopleSoft Inventory or other work orders:	New Work Order Demand:	Need Date Quantity Available:
25	20	8	25 – 20 = 5

Example of the calculations that occur when there is enough available:

Current Available:	Demand from PeopleSoft Inventory or other work orders:	New Work Order Demand:	Need Date Quantity Available:
25	20	3	25 – 20 = 5

An item can appear on a work order parts list multiple times. PeopleSoft Inventory factors in all previous instances of the item when determining quantity available. For example a work order requires:

Item	Quantity	Need Date
Air Filter	10	10/25
Air Filter	5	11/01

The business unit quantity available for this air filter = 12.

The Air Filter required on 10/25 will have quantity available, but the Air Filter required on 11/01 will not have quantity available.

The following table describes the messages that a display based on the availability of an Inventory item.

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Note. Some of these messages also apply to noninventory items selected on the Purchase/On Hand Schedules - Availability tab.

See Chapter 18, "Scheduling a Work Order," Procurement of Material, Labor, and Tool Resources Using the Purchase/On-Hand Schedules Grid, page 464.

See Chapter 18, "Scheduling a Work Order," Scheduling Purchase/On-Hand Resources for a Work Order Task, page 501.

Message Number	Description	Explain Text	Applicability	Indicators
15005	Row is pegged but the pegged supply is after the demand date.	The row has been pegged to incoming supply however the peg supply date is after the demand date you have requested	IN/PO	Supply date is later then need/due date
15006	Row has been pegged but the peg supply is past due.	The incoming supply is past due and has not yet arrived or been received.	IN/PO	Pegged supply not received on time
15007	Row is pegged however the requisition that is pegged to has a null date.	The incoming requisition supply transaction has a null date. The row is pegged to the requisition but the date is null and unknown when it will be received.	IN/PO	No requisition due date
15008	Multiple reasons exist, further research required.	There are multiple reasons why this item is not available for the requested date, further research is required for this item to determine availability.	IN	ATP calculations finds more then 5 reasons, passes tis in as the 5th reason
15011	On-hand quantity is insufficient to meet the requested demand	There is not enough on-hand or incoming supply to meet the requested demand at this time	IN	Quantity for specified date does not meet requested WO demand
15012	Negative on-hand quantity exists.	Item has already been reserved but on-hand quantity has gone negative	IN	Reserved but other demand has qty going negative

This table describes the reasons that the system indicates that inventory are unavailable.

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Note. Some of these reasons also apply to noninventory items selected on the Purchase/On-Hand Schedules - Availability tab.

See Chapter 18, "Scheduling a Work Order," Procurement of Material, Labor, and Tool Resources Using the Purchase/On-Hand Schedules Grid, page 464.

See Chapter 18, "Scheduling a Work Order," Scheduling Purchase/On-Hand Resources for a Work Order Task, page 501.

Reason	Inventory (INV), Noninventory (NON-INV) Items	Item Availability
Pegged-related: Pegged Supply is scheduled late	Inv, Non-Inv	Not Ready: item's scheduled supply date is later than need/due date
Pegged-related: Pegged Scheduled supply is past due	Inv, Non-Inv	Not Ready: scheduled supply not received on time
Pegged-related: Pegged Requisition due date not specified	Inv, Non-Inv	Not Ready: assumed, when pegged Req has null due date
Pegged-related: Multiple exceptions – needs research	Inv, Non-Inv	Not Ready: multiple reasons, due to multiple pegged supplies
Reserve-related: On-hand qty not sufficient	Inv (only)	Not Ready: based on on-hand qty, incoming supply and existing demand, insufficient material exists
Reserve-related: Negative on-hand qty	Inv (only)	Not Ready: If item is reserved and qty available is negative, we cannot determine if the qty will be available

Material Readiness

In the interim period between the scheduling and actual start of the work for a work order task events may occur, especially in PeopleSoft Inventory or PeopleSoft Purchasing, that can negatively affect the availability of material items scheduled for the task. To accommodate these changes, PeopleSoft Maintenance Management provides a planner or scheduler with a report that they can use to analyze and resolve current material availability problems, prioritize issues, and bottlenecks related to work orders. This report will indicate whether the materials scheduled work order tasks, based on a selected period of time, are ready or not.

After a user enters the appropriate run control parameters for this report, the application engine will:

- Select the appropriate work order task and scheduled material data for analysis.

  Only work order tasks with scheduled inventory and/or scheduled procurement items are included in the report. Scheduled tasks with issued items are included in the report processing and analysis. Issued items are automatically considered to be available. If all items have been issued for a selected task, the task is considered material ready. The process does not select *Canceled, Completed*, or *Closed* tasks. Inventory floor stock items and on-hand procurement items are not included on the report. All noninventory items must have been pegged before the incoming supply can be analyzed.

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Important! For inventory items, the system does not include unpegged purchase orders, requisitions, and interunit MSRs as supply thus the quantity on these unpegged supply orders are not considered as supply when determining readiness.

- Perform high-level calculations to determine the availability of individual quantities of items and the overall material readiness of the work order task.

  These calculations determine what is available as of a specified date and any pegged supply.

  The material readiness calculated and displayed for the report may not be as complete or accurate as the research performed by a user in the work order component. The batch process only looks at the current selection of work order tasks and their requested items to determine total demand within the reporting period. If some item demand was excluded from the reporting period based on the selection of specific run control parameters, the report may determine a misleading readiness of a work order task.

  In cases where multiple work order tasks are competing for the same item, which has limited supply, the system cannot prioritize the demands of the various tasks and allocate the supply accordingly. In this situation, a status of *Undetermined* will be indicate the material readiness status of one or more of these tasks on the report.

  Only one reason code will be applied to tasks that are identified as *Not Ready*, even if there is more than one reason for this status. The statuses for the tasks include:

  - Ready

    All scheduled items for this material type are determined to have sufficient quantity available.

  - Not Ready

    Displays an exception, which indicates that at least one scheduled item from this material type is not ready based on the exception reason that accompanies this status.

  - Undetermined

    Displays an exception in which at least one scheduled item for this material type is Undetermined based on the accompanying exception reason, and no other scheduled items for this material type are determined to be Not Ready . Not Ready always takes precedence of Undetermined.

  - The status is blank, which indicates that the run control reporting option was set to exclude analysis of this material type.

  - Asterisks (*****) display in the status field, which indicates that no scheduled items for this material exist or have been selected based on the date range for the task.

Procurement of Material, Labor, and Tool Resources Using the Purchase/On-Hand Schedules Grid

There are many instances when users may need to purchase specific materials, tools, and labor to complete a work order task. You determine whether you want to create a requisition or a purchase order in the work order business unit's Integrations page. To identify resources that need purchasing, users can:

- Copy from the Purchase/On-Hand requirements.
- Select parts from the Equipment Parts List (EPL), if available, which is stored in the PeopleSoft Asset Management asset repository.
- Manually enter non-inventoried items and open description lines.
- Send labor resources and tools resources to the Purchase/On-Hand Scheduling grid from the Labor Scheduling grid and the Tools Scheduling grid using the Move Selected to Purchase button.

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You also can tie back from requisition, purchase order, or voucher that you create in PeopleSoft Purchasing or PeopleSoft Payables to a work order by referencing a work order business unit, work order ID, and work order task. This inserts a resource row in the Purchase/On-Hand Schedule resource row in the work order to enable the costs to flow back to the work order for these procured resources.

Note. If a requisition, purchase order, or voucher is created and tied back to a work order, then a row is inserted in the Purchase/On-Hand Schedules grid, the PO status on the work order is set to *complete*, and the row is disabled.

You can authorize specific users to procure resources by granting them access through the User Preferences component.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Understanding Overall System Setup Parameters for PeopleSoft Maintenance Management, page 67.

The Purchase/On-Hand Schedules - Procurement tab enables you to select a noninventory item or enter an open description resource row, enter a planned quantity, and select a UOM. You indicate whether a resource is labor, material, or tools, and the due date. You can override the default due date, which is the scheduled start date for the work order task. You also indicate if this resource is on-hand. Costs are not calculated for on-hand materials. The On Hand check box enables a scheduler to enter one or more rows, which do not need to be procured but are *in-store* stocked items. For example, you could procure 100 hard drives, expense them upon purchase, and keep your supply on hand in a cabinet in the work shop. If you need one of these hard drives to complete a work order task, you can identify this hard drive as on-hand in the work order Purchase/On-Hand grid for information purposes only.

The Purchase/On-Hand Schedules - Details tab enables you to review the Pegging Inquiry, once the resource is pegged, and also identifies the pegging status, the requisition status or the purchase order status. You can indicate whether you want the resource delivered and how you want it delivered. When a work order creates a requisition or purchase order for a noninventory or open description resource, the system automatically pegs the resource row, which basically reserves the resource for the specific work order. The requisition or purchase order status enables the scheduler to determine the status of the procurement transaction. Once you select and stage the row to either the requisition load or purchase order build process, the system updates status and prevents any future staging of the row. Once the requisition load or purchase order build process successfully creates the requisition or purchase order the status is updated to *complete*.

The status displays on the Purchase/On-Hand Schedules - Details tab. These statuses were created by PeopleSoft Maintenance Management to identify the stage of the procurement transaction. You can only delete Purchase/On-Hand Schedules rows with a peg status of *New.* If a row has a status of *Ready to Stage or In Process,* it cannot be changed.

The peg statuses are:

- New, which is the default status when you add a new Purchase/On-Hand Schedules row is added to the work order task.
- Ready to Stage, which displays when you select the Load Req or PO button for the selected rows.
- In Process, which displays when you select the Load Req or PO button, the selected rows have been staged, and all the save processing has completed.

  This status signals that the selected rows are in the Req Load or PO Load process. You must run the Req Loader or PO Load processes to create the Requisition or PO.
- Complete, which displays when the staging process completes successfully and a Requisition or PO is created.

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The status can also display as *Complete* if the row was backward tied from a Requisition or PO to a work order. Creating a backward tie to a work order is when the system inserts a row into a Purchase/On-Hand Schedule in the work order.

The Purchase/On-Hand Schedules - Availability tab requires that the requisitions or purchase orders for the work order be pegged prior to selecting the Item Availability button to ensure that PeopleSoft Purchasing is aware of the demand from the work order. If the Purchase/On-Hand row has been pegged, the system checks to see if the scheduled due date is prior to the goods and services required date.

See Chapter 18, "Scheduling a Work Order," Inventory Item Availability, page 459.

The Purchase/On-Hand Schedules - Vendor tab enables you to select the vendor from whom you are making this purchase. If you enter a noninventory item row, the default category value is derived from the Item setup. If you do not specify a vendor when staging to the Purchase Order process and you have entered an open description resource row, the system issues an error preventing the rows from being staged until all errors are corrected. You must select a vendor ID for all open description rows, as well as select a category value. Additional values that must be entered before you can successfully stage the work order to the Purchase Order are Ship to ID and Location.

The Purchase/On-Hand Schedules - Default Settings tab displays the work order's GL business unit, which comes from the work order business unit, the item's setID, and a supplier reference. Supplier reference is only populated if copied from an EPL in which a supplier has been entered.

The Transaction Source field on this tab identifies the source of the inventory transaction and determines whether the transactions are considered Scheduled or Actuals. If a transaction source is Scheduled, the total scheduled costs appear on the Cost page of the work order. If a transaction source is Actuals, you must run the Cost Summarization process to view the total actual costs on the Cost page of the work order. When Actuals is returned from a feeder application such as a voucher from PeopleSoft Payables or a P-Card from e-Procurement, the Planned Quantity field on the Purchase/On-Hand Schedules - Details tab is populated with a value of zero and:

- The system will not calculate the scheduled costs for the row or rows that are inserted by the feeder application.
- The costs will not roll up to the task's scheduled costs on the Cost page in the Work Order component for that Purchase/On-Hand resource.
- Changes to the rows are prevented if entered from another application.

The Purchase/On-Hand Schedules - Cost tab multiplies the unit cost times the planned quantity to arrive at the scheduled procurement cost. If this is a noninventory item row and a standard cost is set up for the Item under the PeopleSoft Purchasing Attributes for the item, a unit cost value displays in the field. If the noninventory item does not have a minimum standard unit cost set up, you must enter an estimated unit cost. If you know the cost or approximate cost for an open description row, you may enter it, otherwise you are not required to enter a cost. However, if you leave the cost at 0, the requisition or purchase order is created with a 0 price. You select the Calculate Price check box to enable the Purchase Order Calculation (PO_CALC) process to calculate the current price for a noninventory item rows. The Calculate Price check box is disabled for all open description rows because the PO Create (PO_CREATE) process has no method of calculating the price for open description rows.

When the Purchase Order is staged, you can perform one of these activities:

- Run the PO Calculation process (PO_POCALC) and then the PO Create Process (PO_POCREATE).
- Run the PO Auto Sourcing process (PO_AUTO_SRC) which basically is one process that combines the Calculation and Creation processes.

If you load requisitions instead, once you select the Purchase/On-Hand rows to stage, then you run the Load Requisition (PO_REQLOAD) process.

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The cost of these items and open description rows flow through the Procure to Pay cycle and ultimately into PeopleSoft Project Costing. The costs are updated in PeopleSoft Maintenance Management by running the Cost Summarization process or by closing the work order.

The Purchase/On-Hand Schedules - Distributions tab enables you to indicate whether you want to distribute the purchasing data by amount or quantity. PeopleSoft Purchasing allows multiple distributions and enables users to override the ChartFields.

See Chapter 3, "Understanding PeopleSoft Maintenance Management," page 13.

When you create a requisition or purchase order to fulfill a need for labor resources, the system ensures that the required date for the work order task is specified on the purchase order or requisition line. You use a noninventory or open description requisition or purchase order to outsource repairs, such as a motor rewind, or services, such as contract labor. To populate the Purchase/On-Hand Schedules grid for these labor and service requirements, you can use the Move Selected to Purchasing button, manually add the line, or copy the line from an existing template. You also can enter a labor or tool resource that is often procured in the Purchase/On-Hand grid by setting up the labor or tool resource in a noninventory item ID and selecting the resource in the item ID prompt.

Pegging

When you click either the Load Requisition(s) or Load Purchase Order(s) button in the work order, depending on the configuration specified in the work order business unit, the system automatically pegs the work order to either the requisition or purchase order when the requisition or purchase order is created. When you select the Add Requisition or Add Purchase Order button in the work order and access PeopleSoft Purchasing to manually create a requisition or purchase order, you can manually create a link to the work order, which also pegs the work order to either the requisition or the purchase order that you create.

Pegging for Purchase/On-Hand materials ties the Requisition or PO to the work order so that when you create vouchers in PeopleSoft Payables, the costs are sent to PeopleSoft Project Costing and eventually back to the PO. Creating the work order association copies the work order distributions onto the either the requisition or PO. The Project and project activity derive the default work order distributions from either the requisition or the PO. Users cannot change this information. When a requisition is sourced to a PO, the work order peg is moved to the PO. When the PO is received, if notification is enabled, the contact person in the work order is notified. With PeopleSoft Payables vouchers, the costs flow to PeopleSoft Project Costing and the work order cost collection picks up these costs.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Creating Requisitions Online" and *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Understanding Purchase Orders".

Noninventory Item Availability

Planners and schedulers can determine if a noninventory items is available for a work order task on a specific date by selecting a row on the Purchase/On-Hand Schedules grid selecting the Item Availability button. The system indicates whether the item is available on the Availability tab of the Purchase/On-Hand Schedules grid. The system can only determine noninventory item availability on a future date if pegs exist and if the supply that is pegged to the specific demand.

There are two ways to peg Purchase/On-Hand data:

- The Purchase/On-hand data is staged to the Requisition Loader or Purchase Order Load staging processes and a requisition or purchase order is created.
- A manual requisition or purchase order is created and backward tied to the Purchase/On-Hand data of the work order.

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When you select the Item Availability button for a row, the system displays either a *Yes* or a *No* in the Item Availability field. Yes indicates that there is sufficient quantity for the requested date and requested WO quantity. No indicates then that informs the planner or scheduler that there is either insufficient quantity to fulfill the requested demand of the work order or there is partial or no quantity available. When No appears in the field, you can click on the link to review the Item Availability page and the message that describes why the item was not available. These messages are defined in a table later in this section.

The quantity available is displayed in the ordering unit of measure in the Purchase/On-Hand Schedules - Availability tab.

If the noninventory item is not available, the system displays a reason code in the Item Availability column, which explains the reason for the unavailability of the item. The reasons codes are:

1. The purchase order due date is after requested date

   The purchase order tied to the work order Purchase/On-Hand line has a due date beyond the current work order due date.

2. The received quantity is insufficient to meet requested work order quantity.

   For example, the work order requested a quantity of ten and only six were received.

3. The pegged purchase order quantity is insufficient to meet the required work order quantity.

   For example, the initial work order planned quantity was increased beyond the quantity pegged.

4. No peg exists.

   The Purcahse/On-Hand data was not staged/pushed to Procurement, or a requisition or purchase order was not tied to the Purchase/On-Hand row on the work order.

5. The Purchase/On_Hand quantity for the work order was pegged using a requisition and the due date on the requisition is null.

   For example, the due date on the requisition was not entered (is null).

6. The pegged supply is past due.

   For example, the pegged supply (incoming supply) has been delayed and not received

The following table describes the messages that a display based on the availability of a procured item:

Note. Some of these messages also apply to the availability of inventory items selected on the Inventory Schedules - Availability tab.

Message Number	Description	Explain Text	Applicability	Indicators
15005	Row is pegged but the pegged supply is after the demand date.	The row has been pegged to incoming supply however the peg supply date is after the demand date you have requested	IN/PO	Supply date is later then need/due date
15006	Row has been pegged but the peg supply is past due.	The incoming supply is past due and has not yet arrived or been received.	IN/PO	Pegged supply not received on time

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Message Number	Description	Explain Text	Applicability	Indicators
15007	Row is pegged however the requisition that is pegged to has a null date.	The incoming requisition supply transaction has a null date. The row is pegged to the requisition but the date is null and unknown when it will be received.	IN/PO	No requisition due date
15009	Row has not been pegged.	The procured row has not yet been pegged.	PO	Purchase/on-hand row has not even been staged or backward tied (auto added from Req or PO)
15010	Insufficient supply exists.	The procured row has been pegged but the incoming supply is insufficient to meet the requested demand.	PO	Not enough quantity received

This table describes the reasons that the system indicates that noninventory items are unavailable.

Note. Some of these reasons also apply to inventory items selected on the Inventory Schedules - Availability tab.

Reason	Inventory (INV), noninventory (NON-INV) Items	Item Availability
Pegged-related: Pegged Supply is scheduled late	Inv, Non-Inv	Not Ready: item's scheduled supply date is later than need/due date
Pegged-related: Pegged Scheduled supply is past due	Inv, Non-Inv	Not Ready: scheduled supply not received on time
Pegged-related: Pegged Requisition due date not specified	Inv, Non-Inv	Not Ready: assumed, when pegged Req has null due date
Pegged-related: Multiple exceptions – needs research	Inv, Non-Inv	Not Ready: multiple reasons, due to multiple pegged supplies
Pegged-related: Procured item not pegged	Non-Inv (only)	Not Ready: assumed, when pegged Req has null due date
Pegged-related: Procured item insufficient pegged supply	Non-Inv (only)	Not Ready: item has pegged supply, but insufficient to cover needed qty

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Work Order Procurement Inquiry

Clicking the Procurement Inquiry button accesses the PeopleSoft Maintenance Management Purchasing and Pegging Inquiry component. This inquiry enables a scheduler to review the specific procurement transactions that exist for a given work order.

See Chapter 23, "Reviewing PeopleSoft Maintenance Management Inquiries," Using the Purchasing and Pegging Inquiry, page 645.

Purchase Order or Requisition Add

Clicking this button accesses the Purchasing Add/Update Requisition or Purchase Order component, where you can add a new purchase order or requisition, depending on the configuration in the work order business unit. This provides a convenient way to add a purchase order or requisition based on the work order by eliminating the need to exit the work order and selecting the options separately in PeopleSoft Purchasing. The work order key fields will not be copied if you click this button to add a requisition or purchase order, it is simply a navigation aid to help navigate to the component to add the necessary procurement transaction.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Creating Purchase Orders Online".

Purchase Order or Requisition Load

In order to stage work order Purchase/On-Hand rows you need to ensure that all of the data elements are populated properly. Once all edits are clear, you must select the check box for those rows for which you want to stage prior to clicking the Purchase Order or Requisition Load button. For each Purchase/On-Hand row you selected, the system inserts the row into the Purchase Item Stage record (PO_ITM_STG). Corresponding Purchase Order distributions are also inserted into the Distribution Staging record (PO_DIST_STG). Once the rows are staged, you must access PeopleSoft Purchasing to run either the PO Auto Sourcing process or the PO Calculations and PO Creation processes to create the purchase order.

If the work order business unit is configured for requisitions, then the Load Requisition(s) button displays instead of the Load Purchase Order(s) button. When you click the Load Requisition(s) button, this flags the selected work order Purchase/On-Hand row(s) for the Load Requisition process. You must then navigate to PeopleSoft Purchasing and access the Load Requisitions process.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*.

The Work Order Workbench

Before you can assign a scheduler to a work order task so that the scheduler can access the Work Order Workbench, you must:

1. Set up a role and permissions for a scheduler.
2. Set up the scheduler as an employee either using the PeopleSoft HRMS or FSCM database.
3. Establish the scheduler as a resource in PeopleSoft Maintenance Management.
4. Access PeopleSoft Maintenance Management's Manage Profiles for the scheduler and associate the scheduler with a shop.
5. Access the shop and enter a user-defined scheduler's code and then select the scheduler to associate with the code.

   You can assign as many schedulers to a shop as you want, but you can only identify one scheduler as the primary scheduler. The primary scheduler's name displays, along with the scheduler code in the work order's Requirement's page for each work order task.

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Setting up schedulers in the shop based on a scheduler's code enables you to easily change the scheduler assigned to multiple work order tasks without having to access each work order. You just access the shop and remove the current scheduler's employee ID assigned to the scheduler code and assign another scheduler's employee to the same scheduler's code.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.

You can select different schedulers for each work order task in the work order's Requirements page, as long as they are assigned to the shop associated with the work order. Once you assign a scheduler to a work order task, the scheduler can access the Work Order Workbench component and view a list of assigned work order tasks. The scheduler can add or modify the scheduled start and end date and schedule the work order task directly from the Work Order Workbench. However, the scheduler must click the Work Order link in the workbench to access the work order component and assign resources to the work order task.

When you create a work order, the Scheduling page:

- Is immediately available for pre-approved work orders as long as the shop is set up to access and use Scheduling for its work orders.
- Is not accessible until the work order is approved if work order approval is required based on the set up in the business unit, work order type, or shop.

The Work Order Workbench includes:

- A Task Overview tab, which enables a scheduler to link to the assigned work order and the work order task, as well as view the task's description, the associated asset's description, and any notes associated with the task.

  It also displays the work order type, the priority, the task's status, and the location of the task.
- A Schedules tab, which enables a scheduler to view the required start and end dates for the work order task, as well as enter or modify the scheduled start and end dates and times for each work order task.

  Work order tasks without a start date have a status of awaiting scheduling. You can also select or view any task dependencies.
- A Resources tab, which enables a scheduler to identify which types of resources are set up for each task.

  The scheduler can click one of the resource links, such as Labor, and access the selected resource schedules grid on the work order's Schedules page for the selected task. The scheduler can then assign and schedule resources or modify existing resource schedules, depending on the task's status.
- An Asset Information tab enables a scheduler to review any warranties associated with the asset that is being repaired or maintained in a selected work order task, as well as a history of any other work orders that were associated with this asset.

  The scheduler can also access the target asset's calendar to determine the available dates that the asset can be taken offline for maintenance or repair. After reviewing the dates, the scheduler uses the calendar to reserve the target asset based on the scheduled start and end dates of the work order task.

  Schedulers who have large workloads can set up specific search criteria and save this information. They can select these saved search criteria as a view and access the view at any time, which eliminates the need for setting up the criteria every time they want to view or schedule specific work order tasks.

  Schedulers can create a new work order from the Work Order Workbench and can change the status of one or more existing work order tasks.

A scheduler must be able to respond to changes that may occur during the completion of a work order, such as changes in a resource's availability or access to an asset being maintained. These changes are performed manually by the scheduler.

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You can enable specific users to perform various types of scheduling activities in the User Preferences, Maintenance Management page.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

Using the Work Order Schedules Page to Schedule Resources

To schedule and assign resources for work order tasks use the Work Order (WM_WO) component and the Work Order Workbench (WM_WOTSK_WORKBENCH) component.

This section discusses how to use the Schedules page to schedule resources:

Pages Used to Use the Schedules Page to Schedule Resources

Page Name	Object Name	Navigation	Usage
Schedules	WM_WO_TASK_SCHED	Maintenance Management, Work Order Management, Work Order, click the Schedules tab.	Schedule resources for a work order task.

Assigning and Scheduling Resources for Work Order Tasks

Access the Schedules page.

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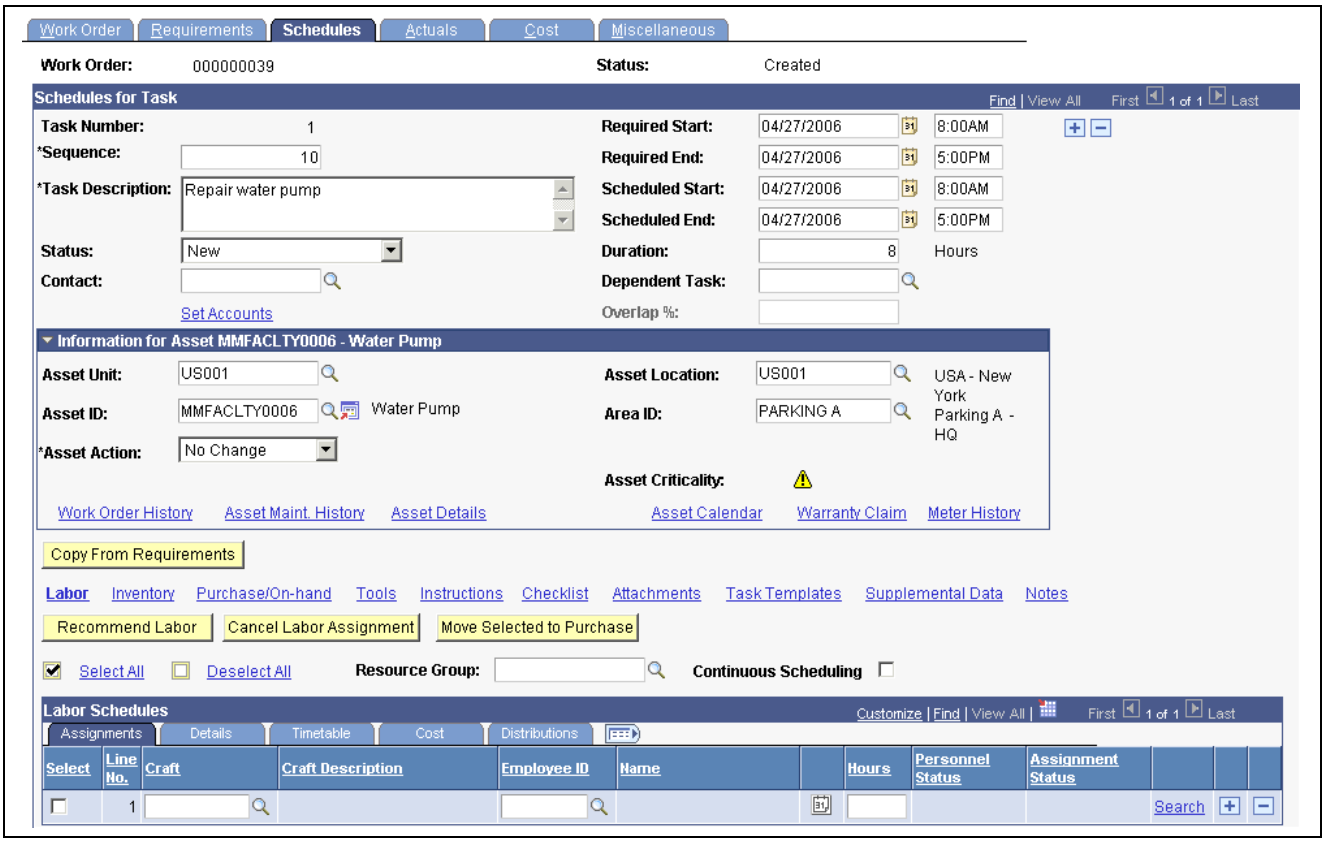

Schedules page

Scheduled Start and **Scheduled End**

Enter the start and end dates and times to schedule resources for this work order task.

The system displays these dates on the Actuals page of the work order, where they can be compared to the actual start and end dates and times.

Note. You must enter these dates before you click the Copy From Requirements button.

Copy From Requirements

Click this button to copy data from the Labor Requirements, Inventory Requirements, Purchase/On-Hand Requirements, and Tools Requirements in the Requirements page to the Labor Schedules, Inventory Schedules, Purchase/On-Hand Schedules, and Tools Schedules grids on the Schedules page.

Labor

Click this link to access the labor scheduling options and Labor Scheduling grid.

Inventory

Click this link to access the Inventory scheduling options and the Inventory Scheduling grid.

Note. You must install PeopleSoft Inventory to access this link.

Purchase/On-Hand

Click this link to access the Purchase/On-Hand scheduling options and the Purchase/On-Hand Schedules grid.

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Tools Click this link to access the Tools scheduling options and the Tool Schedules grid.

See Chapter 14, "Creating a Work Order," Creating Work Order Tasks, page 393.

Scheduling Labor Resources for a Work Order Task

This section describes how to:

- Assign and schedule labor resources for work order tasks.
- Define the Labor Schedules Assignments tab.
- Define the Labor Schedules Details tab.
- Define the Labor Schedules Timetable tab.
- Define the Labor Schedules Cost tab.
- Define the Labor Schedules Distributions tab.
- Define the Labor Schedules Messages tab.

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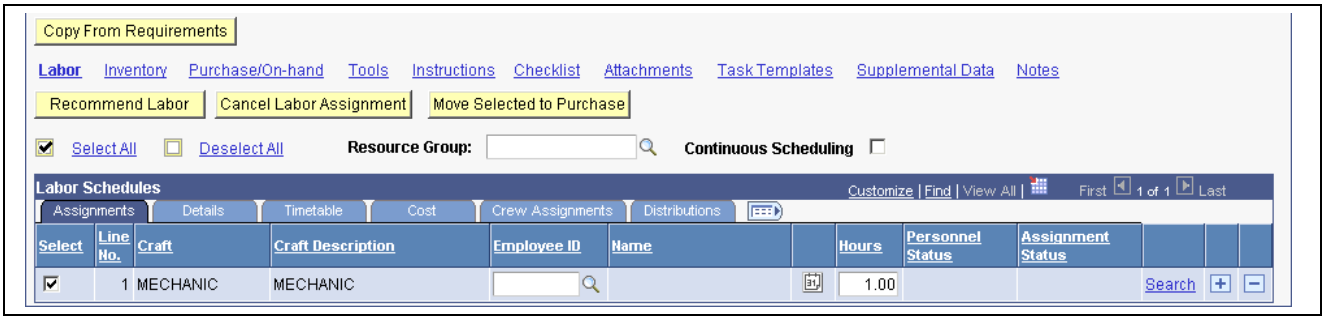
Pages Used to Schedule Labor Resources for a Work Order Task

Page Name	Object Name	Navigation	Usage
Schedules	WM_WO_TASK_SCHED	Maintenance Management, Work Order Management, Work Order, click the Schedules tab.	Enter resource schedules for work order tasks.
Search for Labor Resources	WM_SRCH_LBR_SEC	Click the Search link in the Labor Schedules grid on the Schedules page.	Enter search criteria to search for labor resource to assign to a work order task.
Summary - Worklist	WORKLIST	Click the Worklist link at the top of the page.	Selects resources assigned to a work order task to approve or reject. See *Enterprise PeopleTools PeopleBooks: Using PeopleSoft Applications, Using Workflow*
Details - Worklist	WORKLIST_DETAILS	Click the Details link on the Summary - Worklist page.	Review details regarding resource assignments that require approval. See *Enterprise PeopleTools PeopleBooks: Using PeopleSoft Applications, Using Workflow*
Actuals	WM_WO_TASK_ACTUAL	Click the Actuals tab in the Work Order component.	Displays the actual times, dates, and resource amounts used for a work order task for labor, inventory, purchase/on-hand, and tools resources.

Assigning and Scheduling Labor Resources for Work Order Tasks

Access the Schedules page.



Work Order - Schedules page - Labor Schedules grid

Recommend Labor Select at least one row in the Labor Schedules grid and then select this button to run the Resource Match engine, which matches qualifications and schedules specified in the row to the qualifications and schedules of all PeopleSoft Maintenance Management labor resources and returns the recommended labor

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resources with their qualification and availability fit scores. You can narrow the search by selecting a Resource Group before you click this button.

See Chapter 18, "Scheduling a Work Order," Labor and Tool Resource Matching, page 446.

Cancel Labor Assignment Click this button after selecting rows in the Labor Schedules grid that you want to cancel. This cancels the assignment, which deletes calendar entries (today and future entries) associated with the assignment and clears the employee ID on the selected labor resource schedule row.

Move Selected to Purchase Click this button if you need to obtain a selected labor resource from an outside vendor. You select the labor resource row and then select this button, which moves the resource information to the Purchase/On-Hand Schedules grid. You must specify the craft and the required dates for the work order task. Once a technician is procured, you need to set up the technician as a resource if you want to treat the individual as a regular employee technician, which enables you to schedule this individual to work on work order tasks. In this case, you would create the purchase requisition or purchase order without the work order information on the procurement document. Alternatively, you can procure a service directly to the work order and receive the costs to the work order from the supplier by means of an invoice through PeopleSoft Payables. In this instance, you would enter the work order business unit, work order ID, work order task ID, and resource line number on the procurement documents.

Resource Group Select a resource group ID to use to narrow the search for resources by the Resource Match engine when you click the Recommend Labor button.

Continuous Scheduling Select this check box to have the Resource Match engine determine availability of one or more selected resources by assuming the resource should ideally have one block of time available to complete the work. This option is used only by the Resource Match Engine.

See Chapter 18, "Scheduling a Work Order," Labor and Tool Resource Matching, page 446.

Recommended Labor Resources

When you click the Recommend Labor button, the Verity Search Engine and the Resource Match engine run and match the selected craft's qualifications and availability with either resources in the selected resource group or with all PeopleSoft Maintenance Management resources associated with the selected craft. Once the matching finishes, a Recommend Labor Resources grid displays listing the resources that match the labor resource row criteria.

Select Click this button to add a resource to the Labor Schedules grid.

Qualifications Fit Score Displays the overall fit score calculated by the Resource Match engine.

Availability Fit Score Displays the overall availability fit score calculated by the Resource Match Engine.

Employee ID and **Name** Displays the employee's ID and name and provides access to this employee's monthly schedule.

Supervisor Displays the name of the supervisor of the recommended employee.

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Business Unit Displays the work order business unit that is associated with the shop to which the employee is assigned.

Shop Displays the shop with which the individual is associated.

Note. For a given work order task, if you select an employee who is assigned to a shop that is different from the shop associated with the work order, the assignment may require approval, if your organization has set up assignment approval workflow.

See Chapter 18, "Scheduling a Work Order," Labor Resource Assignment Approval Workflow, page 450.

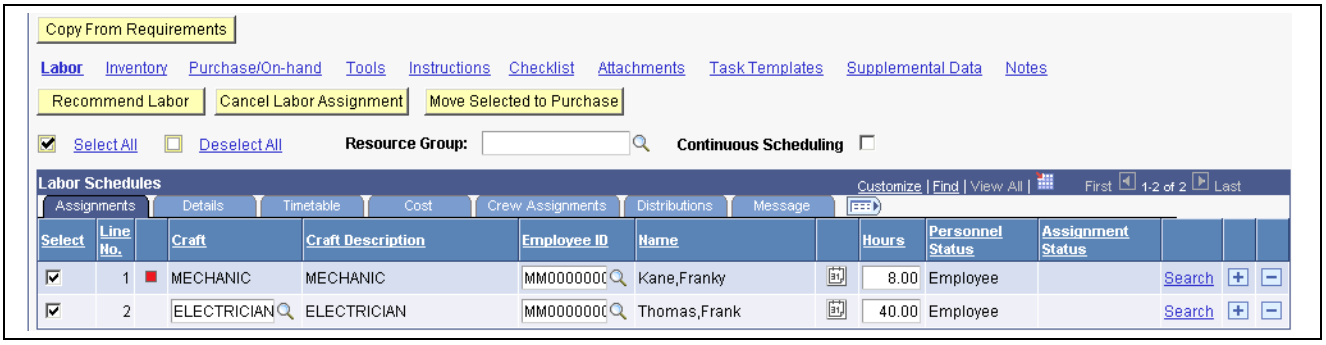
Shift Displays the shift to which the employee is assigned to for the shop that he belongs to as shown on the grid.

Note. You assign a resource to one or more shops, shifts, and one or more crafts using the PeopleSoft Maintenance Management, Labor Administration, Manage Profiles component.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.

Defining the Labor Schedules Assignments Tab

Access the Labor Schedules Assignments tab on the Schedules page.



Labor Schedules - Assignments tab

(warning) and **(error)** and **(information)** Displays either a warning icon or an error icon and displays the Messages tab explaining the icon when the page is saved.

Note. The information icon does not appear in the sample page.

Craft and **Craft Description** Select the craft required for the work order task. You can also click the Copy From Requirements button to copy the labor resource requirements specified on the Requirements page to the Labor Schedules grid.

Employee ID Select the employee ID of the technician that you want to assign to the work order task. Selecting an employee enables you to access the selected employee's monthly, weekly, and daily calendar. This option is known as direct assignment and does not use the Resource Match to help find a qualified resource. If you assigned resources on the Labor Assignments Workbench, those resource assignments also display in the appropriate rows on this page.

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Important! Resources who are assigned to a shop other than the shop associated with the work order usually require approval by the resource's shop manager. You set up workflow approval ahead of time, by setting up the work order business unit Options page, which is used to issue emails to the resource's supervisor and to the resource, if desired. Once assignment approval is set up, when you select an employee ID in this field, enter the hours and other details and save the work order, a message appears indicating that this employee requires approval and that you must access the Worklist link in the page.

See *Enterprise PeopleTools PeopleBook: Workflow Technology.*

Click this icon to display the selected employee's monthly calendar. This calendar is updated with any assignments entered for the resource.

See Chapter 8, "Setting Up Labor and Tools Resources," Managing a Resource's Monthly Schedule, page 233.

Hours Enter the total number of hours that you need the selected employee to work on this task.

If you entered this assignment on the Labor Assignment Workbench, the assigned hours display from the workbench.

Note. You can change these hours as long as they have not been assigned and depending on the work order task status.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

Personnel Status Displays the status of the employee, such as employee, contractor, supervisor. This information is derived from the employee's profile.

Assignment Status Displays the assignment approval status as:

- *Assigned*
- *Canceled*
- *Complete*
- *Pending Approval*

  This status only applies to employees that you assign who work for a shop other than the shop associated with this work order. You must also set up labor resource assignment approval workflow.

- *Rejected*

  This status only applies to employees that you assign who work for a shop other than the shop associated with this work order. You must also set up labor resource assignment approval workflow.

Search Click this link to access the Search Labor Resources page, where you can enter search criteria to search for labor resources to assign to a work order task. This is one of the three methods used to identify resources for a task. You must select a craft and enter the hours in the Labor Schedules - Assignments tab before you click this link.

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Search Labor Resources

Access the Search Labor Resources page.

Shop Select a shop to locate a resource. The default value is the shop associated with the work order. You can override this value and select a different shop in which to search for resources. If you select a resource from a shop different than the shop associated with the work order and assignment workflow is set up, then any resource assignments from this other shop require approval.

Location Code Select the location of the resource to narrow the search.

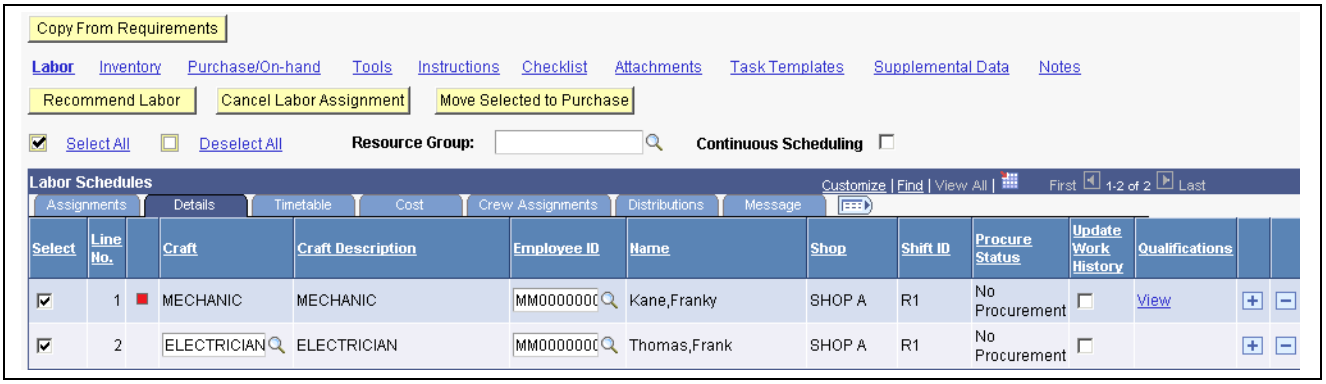
Crew Name Select a crew name to locate resources for this work order task that are assigned to a specific crew. The system searches for resources set up in crews, who are assigned to the selected shop.

100% Available Remove the default check mark from this check box if you want the system to search for resources who are less than 100 percent available to work on the work order task. If the check box is selected, the system searches for resources who are 100 percent available for the work order task.

Search Click this button to search for resources based on the specified search criteria. The resources that match the criteria are listed in the Labor Resources grid. Select the resource you want to assign to the selected task and click the OK button.

Defining the Labor Schedules Details Tab

Access the Labor Schedules Details tab on the Schedules page.



Labor Schedules - Details tab

Shop ID and **Shift ID** When you select an employee ID, the system displays the shop associated with the selected resource based on if:

- The crew assignment is enabled in the shop and the resource belongs to the shop's crew, then the shop associated with the crew and the resource's weekly shift identified in the shop display as default values in the fields.
- The crew assignment is not enabled for the shop and the resource belongs to the shop identified in the work order header shop, the shop in the work order header and the resource's weekly shift display as default values in the fields.
- The resource does not belong to either the crew's shop or the shop identified in the work order header, the system displays a shop to which

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the resource belongs and the resource's weekly shift for that shop. If the resource belongs to multiple shops, the system selects one shop as the default value. Currently, users cannot specify a primary shop as the default shop in the work order task.

Overbook Flag Select this check box to allow the overbooking of a resource. Leave this check box blank if you do not want to allow overbooking for this resource.

Important! This option displays only if you clicked the Require Manual Override button in the shop associated with this work order.

Procure Status Indicates whether this resource is being procured and the status of that procurement.

Update Work History Select this check box to update the work history based on the work order task for the resource.

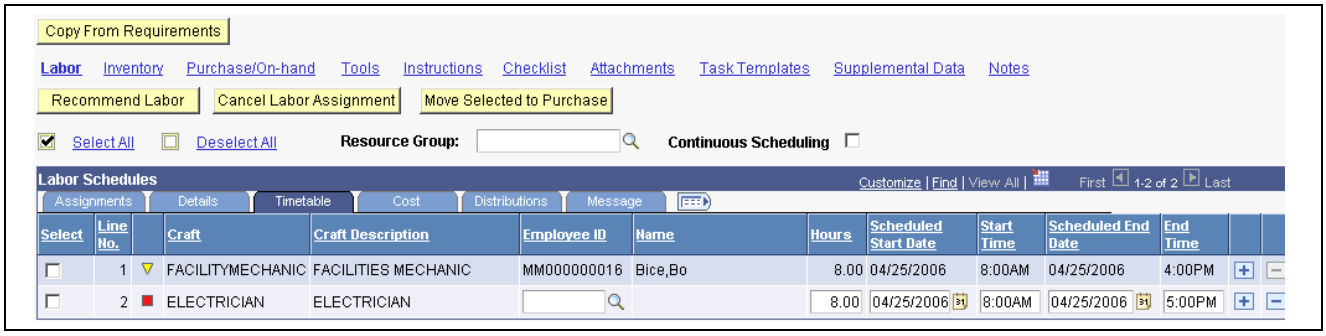
Qualifications Click this link to view the resource's qualifications profile.

Note. You can view, but not modify the labor qualifications entered on the Labor Requirements - Details tab.

See Chapter 8, "Setting Up Labor and Tools Resources," Adding and Maintaining Qualification Profiles, page 177.

Defining the Labor Schedules Timetable Tab

Access the Labor Schedules Timetable tab on the Schedules page.



Labor Schedules - Timetable tab

Scheduled Start Date, Scheduled Time, Scheduled End Date, and **Scheduled Time** Adjust these dates and times to schedule this resource's work in the work order task if the fields are enabled. These dates and times cannot exceed the scheduled start and end dates and times for the work order task. If you entered this assignment on the Labor Assignment Workbench, the values from the workbench display in these fields. However, the changes are validated against the crew schedule requirements and the work order task schedules:

If the Labor Schedules rows originate from the Labor Requirements rows, then:

- If the schedule has crew assignments, the scheduled start and end dates and times must fall within the requirement crew scheduled start and end dates and times.

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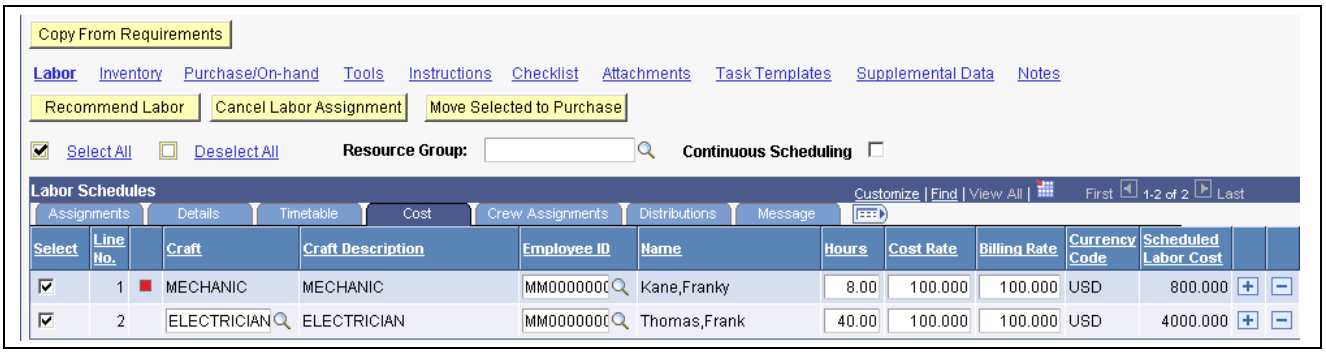
- If the schedule has no crew assignment, the scheduled start and end dates and times must fall within the work order task scheduled start and end dates and times.

For example if Labor Schedules rows 1 and 2 originated from Labor Requirements row 1, and Labor Requirement row 1 is crew assigned, then the scheduled dates and times for Labor Schedules rows 1 and 2 must fall within the crew schedule dates and times for Labor Requirements row 1.

If the Labor Schedules rows did not originate from the Labor Requirements rows, then the scheduled dates in the rows are validated against the task schedules dates and times.

Defining the Labor Schedules Cost Tab

Access the Labor Schedules Cost tab on the Schedules page.

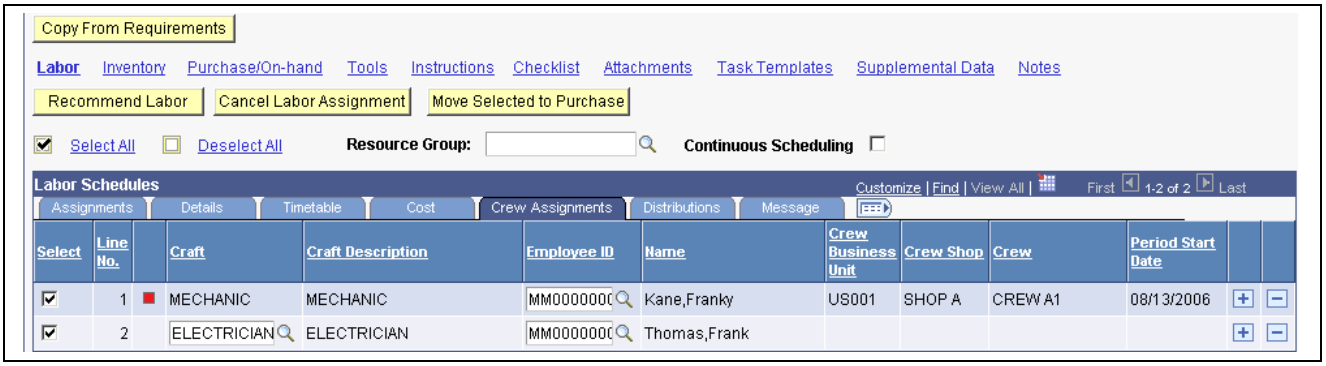


Labor Schedules - Cost tab

Cost Rate and **Billing Rate** These default rate values come from rates entered in either the work order business unit's Integration page, the rates specified for a shop, or the rates specified in the shop for the resource's craft depending on the setup. These scheduled costs are summarized in the work order and compared to the actual costs that come from PeopleSoft Project Costing after the work order task is completed and display in the work order's Cost page. The default Currency Code is derived from the work order business unit.

Defining the Labor Schedules Crew Assignments Tab

Access the Labor Schedules - Crew Assignments tab.



Labor Schedules - Crew Assignments tab

This tab only appears if you have scheduled a crew on the Crew Scheduling Workbench for this work order.

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Crew Business Unit Displays value derived from the Crew Scheduling Workbench.

Crew Shop Displays value derived from the Crew Scheduling Workbench.

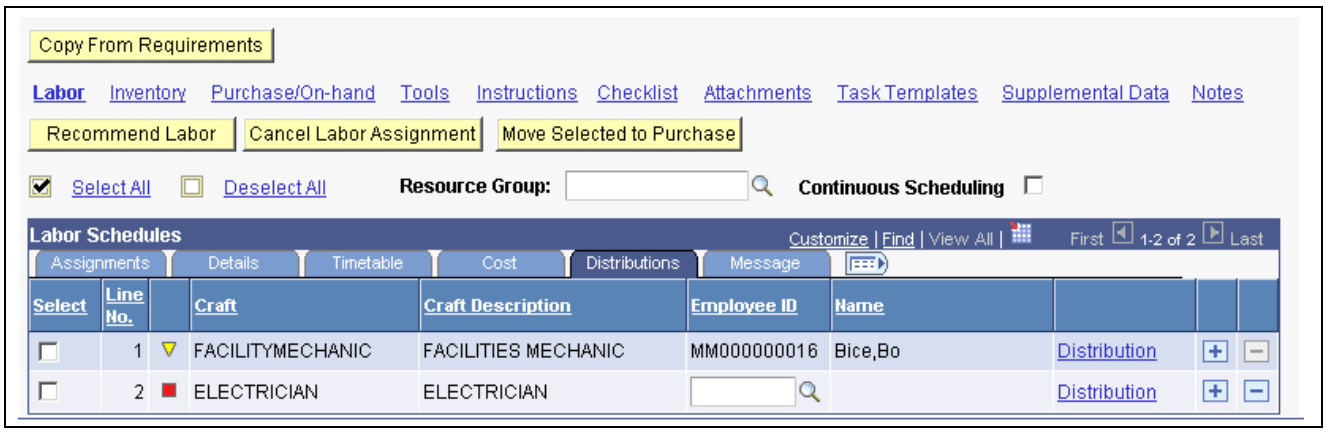
Crew Displays crew selected on the Crew Scheduling Workbench for each task row.

Period Start Displays period start date derived from the Crew Scheduling Workbench.

See Chapter 19, "Performing Crew Scheduling," page 523.

Defining the Labor Schedules Distributions Tab

Access the Labor Schedules Distributions tab on the Schedules page.



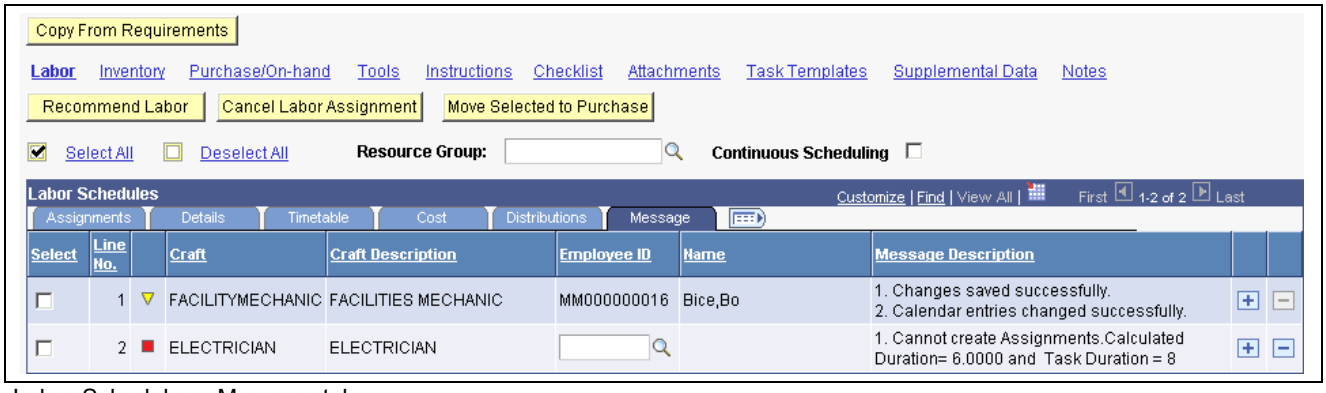
Labor Schedules - Distributions tab

Distributions Click this link to access the distribution data specified for the row after an assignment has been made.

Note. This tab only displays if the View and Update Accounting check box is selected in User Preferences for the user performing the scheduling.

Defining the Labor Schedules Messages Tab

Access the Labor Schedules Messages tab on the Schedules page.



Labor Schedules - Message tab

This tab only displays if a warning, or error message is issued when you save the page.

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Indicates that there is a warning associated with this selection.

Message Description

Displays a description of the warning in the Message Description field for the row.

Indicates that there is an error associated with this selection. A description of the error displays in the Message Description field for the row.

Scheduling Inventory Resources for a Work Order Task

This section describes how to:

- Assign and schedule inventory resources for work order tasks.
- Set up a picking plan.
- Select items from the Equipment Parts List.
- Define the Inventory Schedules Materials tab.
- Define the Inventory Schedules Details tab.
- Define the Inventory Schedules Reservation tab.
- Define the Inventory Schedules Availability tab.
- Define the Inventory Schedules Additional Information tab.
- Define the Inventory Schedules Default Settings tab.
- Define the Inventory Schedules Cost tab.
- Define the Inventory Schedules Distributions tab.
- Perform Inventory batch reservations.

Pages Used to Schedule Inventory Resources for a Work Order Task

Page Name	Object Name	Navigation	Usage
Schedules	WM_WO_TASK_SCHED	Maintenance Management, Work Order Management, Work Order, click the Schedules tab.	Enter resource schedules for work order tasks.
Equipment Parts List Selection	WM_EPL_SELECT_SEC	Maintenance Management, Work Order Management, Work Order, Schedules tab, click Inventory link, click the Equipment Parts List button	Select an inventory item associated with the selected asset for the task.
Process/Output Options	IN_WO_RNCTL_OPT_SP	Click the Picking Plan Setup button on the Inventory Schedules - Schedules page.	Define the run parameters for the pick plan process.

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Page Name	Object Name	Navigation	Usage
Item Search Criteria	ITEM_SEARCH_SP	Click the icon in the Inventory Schedules grid of the Schedules page or on the Purchase/On-Hand Schedules page.	Perform an expanded search for an inventory item.
Pegging Workbench	IN_PEG_DETAIL_SP	Click the Pegging Workbench icon in the Inventory Schedules - Details tab on the Schedules page.	Peg quantity for Inventory item in the work order task.
Pegging Inquiry	IN_PEG_DETAIL_SP	Click the Pegging Inquiry icon in the Inventory Schedules - Details tab on the Schedules page or in the Purchase/On-Hand schedules - Details tab on the Schedules page.	Review the pegging status of an item.
Item/Product Availability	ATP_SUMMARY_INV	• Click the Availability link in the Inventory Schedules - Additional Information tab on the Schedules page. • Inventory, Manage Inventory, Review Inventory Balance Info, Item/Product Availability	Review the availability status of a selected item in the work order task line.
Item Balance by Unit	INV_BU_QTY_INQ	• Click the Item Balance link on the Inventory Schedules - Additional Information tab on the Schedules page. • Inventory, Manage Inventory, Review Inventory Balance Info, Item Balance by Unit	Review remaining balance in Inventory of a selected inventory item in the work order task line.
Delivery Instructions	WM_WO_DELVSCHD_SEC	Click the Delivery Instruction link in the Inventory Schedules - Additional Information tab on the Schedules page.	Add instructions concerning how to deliver the inventory and purchase/on-hand materials.
Reservation Errors	WM_WO_RESERVE_SEC	Maintenance Management, Work Order Management, Work Order. Click the Reservation Errors link on the Inventory Schedules - Reservation tab on the Schedules page.	Review errors generated from Inventory when attempting to reserve an item.

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Page Name	Object Name	Navigation	Usage
Shortage Workbench	IN_SW_SELECTION	• Maintenance Management, Work Order Management, Work Order, Schedules page. Click the Shortage Workbench button in the • Inventory, Fulfill Stock Orders, Shortage Workbench	Reserve and unreserve inventory items selected for work order tasks.
Reserve Materials	RUN_IN_FULFILL_RSV	Inventory, Fulfill Stock Orders, Stock Requests, Reserve Materials Process	Perform batch reservation processing of inventory items selected for a work order task.
Item Availability	WM_WO_ITMAVAIL_SEC	Maintenance Management, Work Order Management, Work Order, Schedules page. Click the No link in the Inventory Schedules–Availability tab.	Review the reason why an item was identified as unavailable .
Reservation Errors	WM_WO_RESERVE_SEC	Click the Reserve Messages link on the Inventory Schedules - Reservation tab.	Review reservation message errors.

Assigning and Scheduling Inventory Resources for Work Order Tasks

Access the Inventory Schedules grid on the Schedules page.

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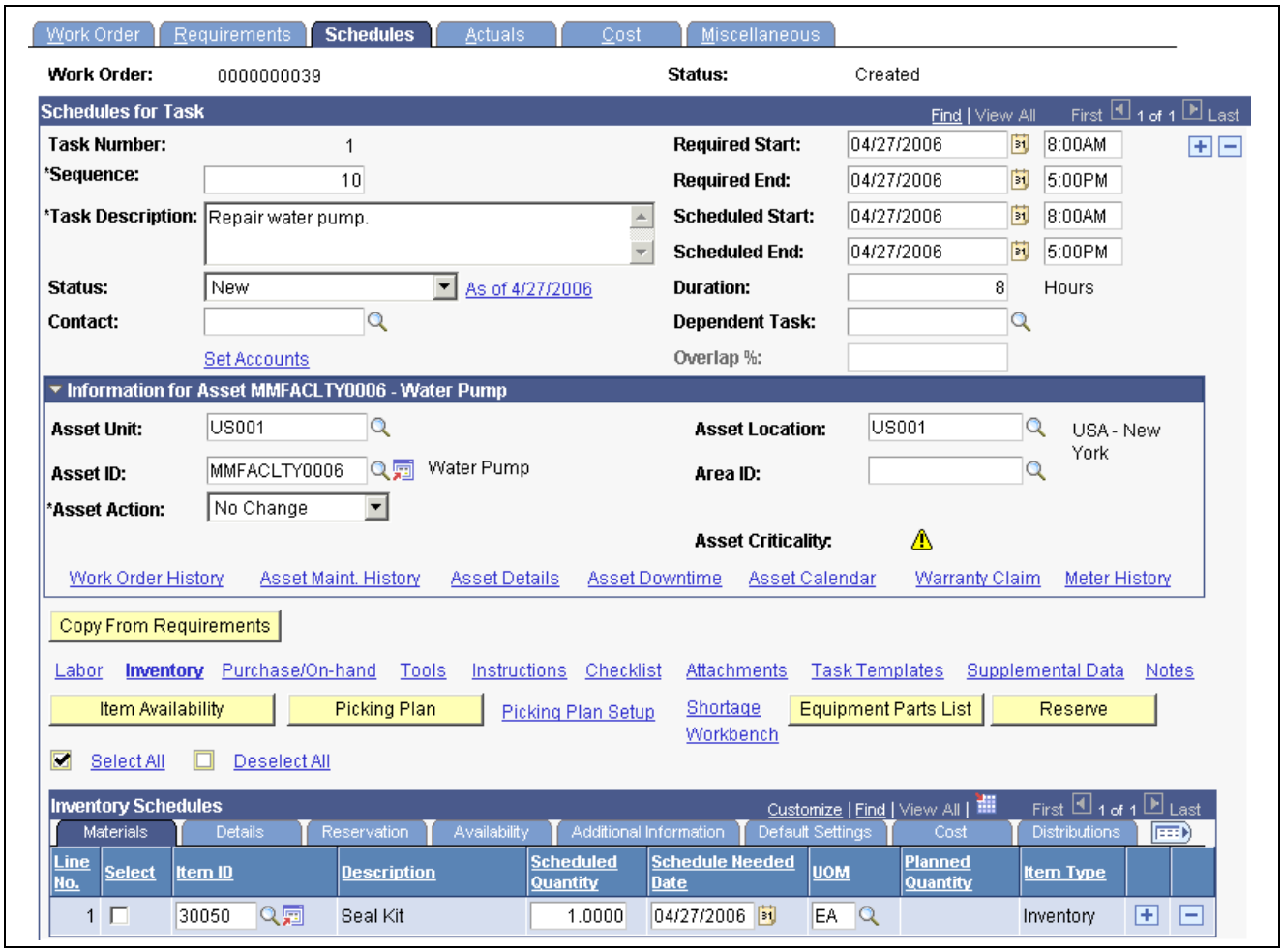

Schedules page - Inventory Schedules

Item Availability

Click this button to determine the availability of a selected item as of the Schedule Needed Date. Selecting this button updates the Availability tab and indicates whether the quantity is available or not, the earliest available date, and the quantity available on the Schedule Needed Date.

See Chapter 18, "Scheduling a Work Order," Defining the Inventory Schedules Availability Tab, page 495.

Picking Plan

Click this button to generate a picking plan for any of the listed items that have not already been selected for a picking plan. You do not have to select each row to generate a picking plan. A message displays indicating that you submitted a picking plan and provides the process instance and pick batch ID for tracking purposes.

Note. If you indicated that items are committed based on the generation of a Picking Plan in the work order business unit's Integration page or the shop definition, then the Inventory Schedules - Details tab indicates that the items are committed.

You must indicate in the User Preferences - Maintenance Management page that a user is authorized to run a picking plan.

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Picking Plan Setup Click this button to display the Process/Output Options page to define the allocations and run parameters for the picking plan report.

Shortage Workbench Click this link to access the Inventory Shortage Workbench to reserve or unreserve the work order demand.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management".

Equipment Parts List Click this button to access Equipment Parts List Selection page, where you can select among multiple EPL templates, if available, listed in descending order of applicability that match the target asset's classification criteria (asset type, subtype, manufacturer ID and model). The default template is listed at the top and is preselected. However, you can select a different template from which to copy the inventory parts. Selecting the template copies all of the inventory parts associated with the asset to the lower portion of the page. You then select the inventory parts that you want to copy to the work order task.

Reserve Click this button to override the reservation rules hierarchy set up in the work order business unit and shop and immediately reserve the items for that task. The results of this selection displays information on the Inventory Schedules-Reservation tab.

Note. This button only appears on the page if the user is authorized to perform this activity on the User Preferences-Maintenance Management page.

Setting Up a Pick Plan

Access the Schedules page and click the Inventory Schedules - Picking Plan link to access the Process Options page.

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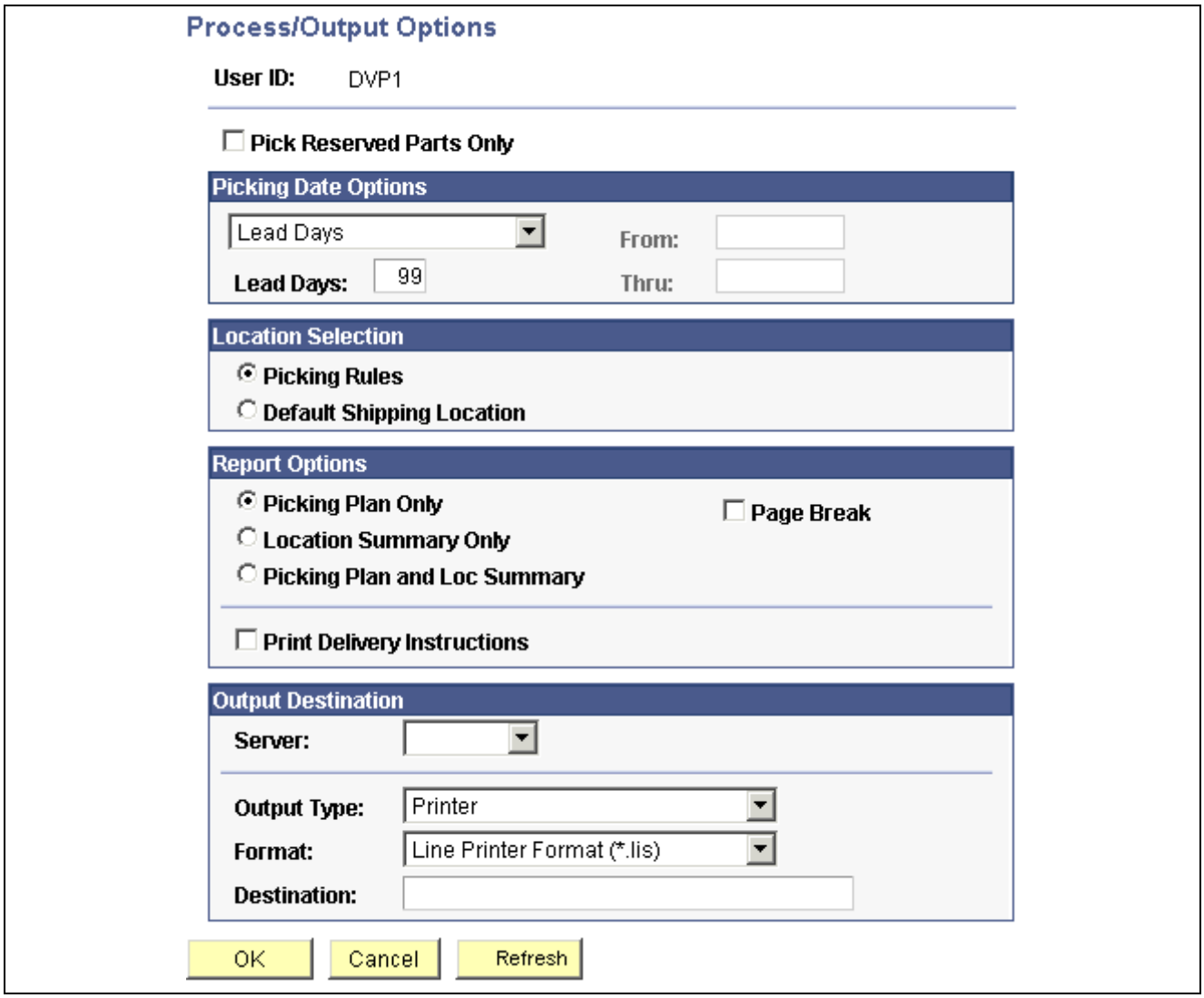

Pick Plan Setup - Process/Output Options page

Pick Reserved Parts Only Select this check box and run the Picking Plan to pick only the reserved inventory items (parts) associated with the work order task.

Note. If the reserve rule is pick plan, all the parts for the task will be picked regardless if they have already been reserved and Pick Reserved Parts only is selected.

Picking Plan Date Options Select one of these values to represent the number of days needed to reserve, pick, pack, and ship the majority of the items in the Inventory business unit. The requested quantities for soft-reserve items can be reserved when the scheduled shipment date falls within one of the following reservation lead days windows:

- *Date Range*

  These fields become available:

  - From:

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- Thru:

  Enter or select the beginning and end dates of the date range, which indicates the period of time that the selected items must be reserved, picked, packed and shipped in PeopleSoft Inventory.

• *Lead Days*

This field becomes available:

- Lead Days

  Enter the number of lead days in which the requested quantities can be reserved, picked, packed and shipped in PeopleSoft Inventory.

- *Today*

  Select this value to indicate that the selected items must be reserved, picked, packed, and shipped in PeopleSoft Inventory as of the current date.

Note. If you do not select or enter one of the previous values, the system will use the lead days indicated for the Inventory business unit in Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Fulfillment, Setup Fulfillment or at the item level in Inventory, Fulfill Stock Orders, Setup Item Fulfillment.

Picking Rules

These rules are assigned at either the Inventory business unit level (Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Fulfillment) or at the item level (Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Item Fulfillment) and have these options:

• Container Option

• Default Putaway Option

• Default Shipment Location

• Fixed Pick Location

• Pick by Date

• Random Pick Locations

Default Shipping Location

These rules are assigned at either the business unit level (Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Fulfillment) or at the item level (Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Item Fulfillment) and have these options:

• Default Ship Staging Location

• Default Cross Docking Location

• Default Putaway Location

• Default Fixed Picking Bin

• Default Pegging Location

• Random Pick Locations

Picking Plan Only

Click this button to generate a regular pick plan report, which shows the demand lines and the picking locations. When executed from the online Picking Plan button in the work order task, it is sorted by work order and work order task IDs.

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Location Summary Only Click this button to generate a report that shows the demand lines to be picked in order of location.

Page Break Select this check box to break the pages in the report for each work order.

Picking and Location Summary Click this button to generate both the Picking Plan and the Location Summary report.

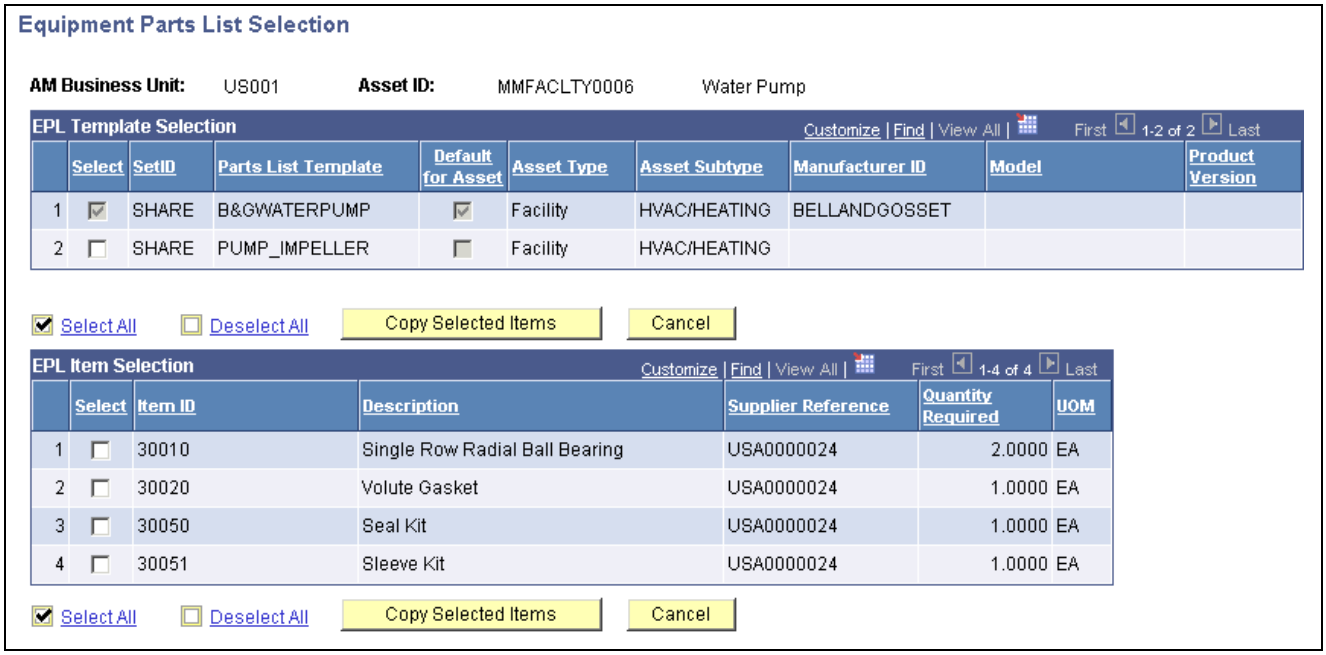
Print Delivery Instructions Select this check box to print the delivery instructions provided that you entered delivery instructions in the Inventory Schedules line.

Output Destination Select the Server, the Format of the output, and the Destination for the output, such as the name of an employee or a job location.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management".

Selecting Items from the Equipment Parts List

Access the Schedules page and click the Equipment Parts List button to access the Equipment Parts List Selection page.



Equipment Parts List Selection page

This sample page displays for a target asset that has multiple EPL templates available. If only a single template is available, then that template displays as preselected in the top part of the page.

EPL Template Selection Displays a list of multiple templates or a single preselected template. These templates are set up in PeopleSoft Asset Management.

If the system lists multiple templates, select the template from which you want to copy items to the work order. The templates are listed in order of their applicability to the target asset specified on the work order task.

The designated default template for the asset is always listed first and is preselected as the default. However, you can select the check box for any other

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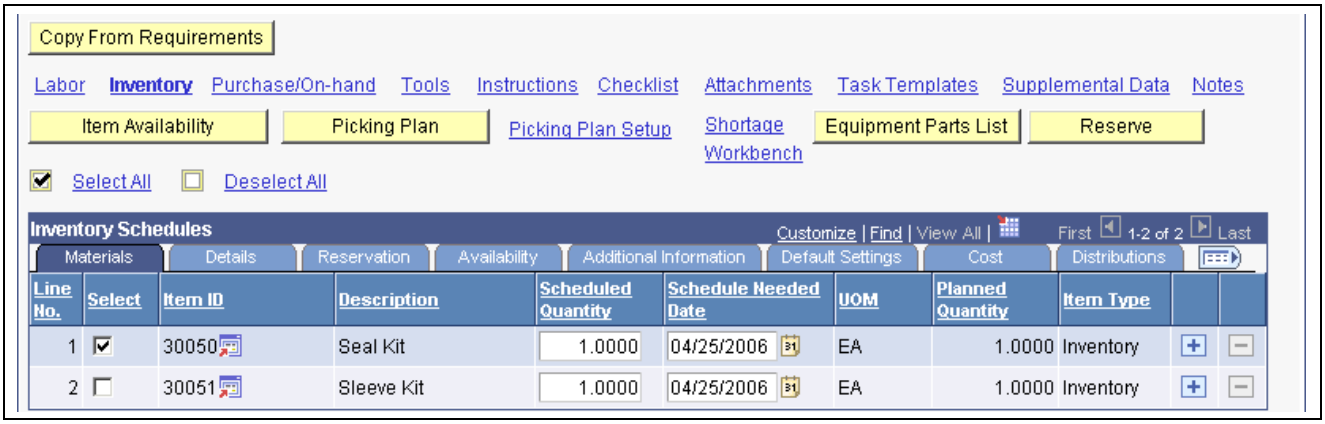
template and the EPL Item Selection grid display will automatically refresh to display the Inventory items corresponding to the template that you selected.

EPL Item Selection Select the one or more of the items that you want to copy to the Inventory Schedules grid of the work order task to maintain or repair the selected asset.

Copy Selected Items Click this button to copy the selected items to the Inventory Schedules grid.

Defining the Inventory Schedules Materials tab

Access the Inventory Schedules Materials tab on the Schedules page.



Inventory Schedules Materials tab on Schedules page

Item ID Select an item ID from the Item ID Lookup page.

Note. This field can also be populated by clicking the Copy from Requirements button or by selecting items from the EPL.

Click this icon to access the Item Search Criteria page, where you can enter information to perform an expanded search for an item ID, select the item, and copy it to the line in the Inventory Schedules grid.

Scheduled Quantity Enter the quantity of items that you need for this work order task.

Schedule Needed Date Select the date that these inventory items are needed to perform the work. The default date is derived from the schedules start date for the work order task.

UOM (unit of measure) Displays the default standard unit of measure for the item. There is a standard unit of measure and an ordering unit of measure associated with an item. . All items are setup with a standard unit of measures such as *EA* (each). However, you can override the default standard UOM with an ordering UOM. For example, an item may be defined with a standard unit of measure of EA. You override this default value with the ordering UOM *Box*since a box may contain 4 *EA*.

Planned Quantity Displays value copied from the work order task's requirements. If there are no requirements copied over, this field is not populated.

Item Type Displays an Inventory item ID attribute value of either:

- *Inventory*

  This type is costed.

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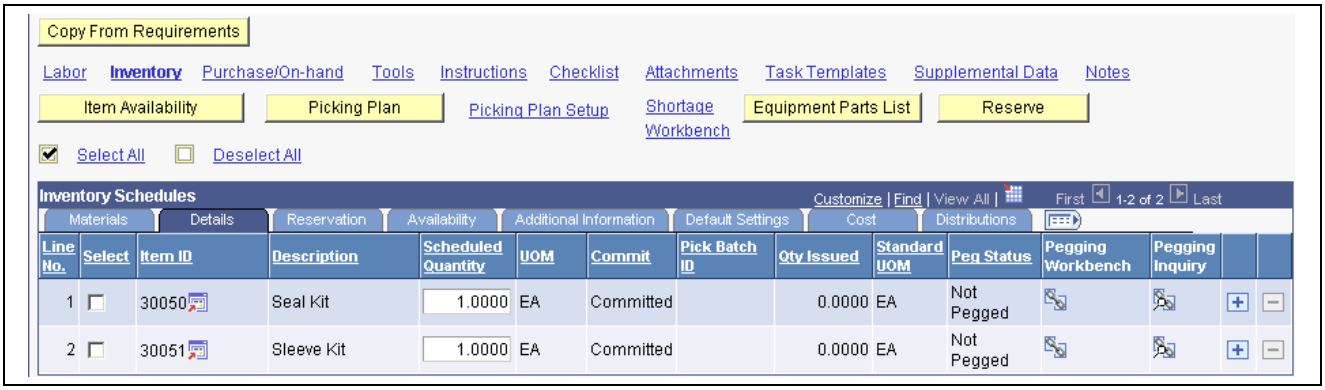
- *Floor Stock*

  This type is not costed and is not issued to the work order. Examples of floor stock items can include: common nuts and bolts, disposable gloves, belts, and tubing.

Defining the Inventory Schedules Details Tab

Access the Inventory Schedules Details tab on the Schedules page.



Inventory Schedules Details tab on Schedules page

Commit Displays whether the item has been committed in PeopleSoft Inventory. The status changes to committed depending on the commit rule that you selected on the work order business unit's Integration page or the shop definition. The commit rules include:

- Generating a picking plan.
- Adding an item to the parts list.
- A change in the work order task status to a specified status.

Pick Batch ID Displays the batch in which the pick plan was generated.

Qty Issued (quantity issued) Displays after item is issued from PeopleSoft Inventory.

Standard UOM (standard unit of measure) Add/Update a PO can also update the peg status to complete if the user reduces the PO quantity to be equal to the putaway quantity. This situation will occur if the user does a partial receipt and decides not to receive any more.

Peg Status Displays the peg status of the selected inventory item:

Note. The peg status that displays in this field only pertains to the purchase of Inventory items and is derived from the PeopleSoft Inventory system. You cannot purchase inventory items from PeopleSoft Maintenance Management.

- *Open*

  Quantity is pegged to supply (Requisition, PO, Interunit MSR).

- *Not Pegged*

  The quantity needed of the selected item is not pegged to supply (Requisition, PO, Interunit MSR).

- *Completed*

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For Inventory Schedules rows, this status requires receiving into PeopleSoft Inventory so Inventory's putaway process, can set the peg status to *Complete* once the entire pegged quantity is putaway.

Add/Update a PO can also update the peg status to complete if the user reduces the PO quantity to be equal to the putaway quantity. This situation will occur if the user does a partial receipt and decides not to receive any more.

- *Canceled*

  This indicates that the requisition, the PO, or the Interunit Material Stock Request (MSR) to which the work order is pegged to has been canceled or the WO scheduled quantity has been decreased such that the quantity pegged has been decreased to zero, and the work order row is not pegged to any other supply.

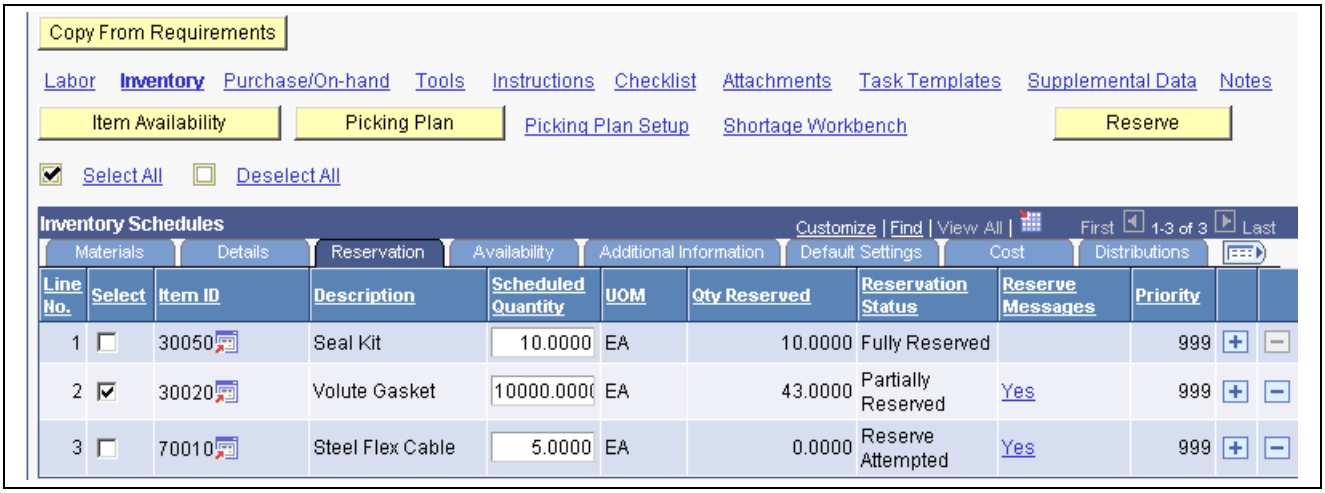
Pegging Workbench Click the icon to access the Pegging Workbench in PeopleSoft Inventory, where you can add the quantity needed for the item to an incoming requisition or purchase order. This essentially reserves the specified quantity for the work order task against the incoming supply. When the material is received, a notification can be generated to notify WO personnel the material has arrived.

Note. If you access the Pegging Workbench from the Inventory Schedules - Details tab, the system will autonumber the work order when it is saved (as long as it has not been previously saved).

Pegging Inquiry Click this link to access the Inventory Pegging Inquiry and review the pegging details of an item.

Defining the Inventory Schedules Reservation Tab

Access the Inventory Schedules Reservation tab on the Schedules page.



Inventory Schedules Reservation tab on Schedules page

Qty Reserved(quantity reserved) Displays the actual quantity reserved in PeopleSoft Inventory.

Work Order demand can be reserved in the following ways:

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- You save the work order and the system processes commit and reservation rules and triggers the reservation process in PeopleSoft Inventory.
- You click the Reserve button.
- You run the Reserve Materials process in PeopleSoft Inventory.
- PeopleSoft Inventory receives a pegged work order row.
- The items are reserved on the Shortage Workbench in PeopleSoft Inventory.

Reservation Status Displays the status of the selected item's reservation. Statuses that display include:

- *Pending Reservation.*

  Reservation has not been attempted.

- *Reserve Attempted.*

  Reservation has been attempted and no quantity has been reserved. This can indicate that an error has occurred preventing the item from being partially or fully reserved.

- *Partially Reserved.*

  The scheduled quantity is only partially reserved, typically due to a shortage in PeopleSoft Inventory.

- *Fully Reserved.*

  The total scheduled and committed quantity of items (parts) have been reserved at the business unit/item level in PeopleSoft Inventory, which increases the Qty Reserved and decreases the Qty Available amounts.

Reserve Messages Displays link to Reservation Messages page, which describes the reason(s) why an item could not be fully reserved. This link appears when you attempt to reserve materials for a work order task.

Priority Displays default value, which is derived from the setup of the reservation rules either at the work order business unit level, shop level, or work order type level, which is set up in the shop. PeopleSoft Inventory uses this number to sort demand and prioritize it accordingly, with 1 being the highest or most important priority and 999 being the lowest or least important priority.

Reservation Errors

Access the Reservation Errors page.

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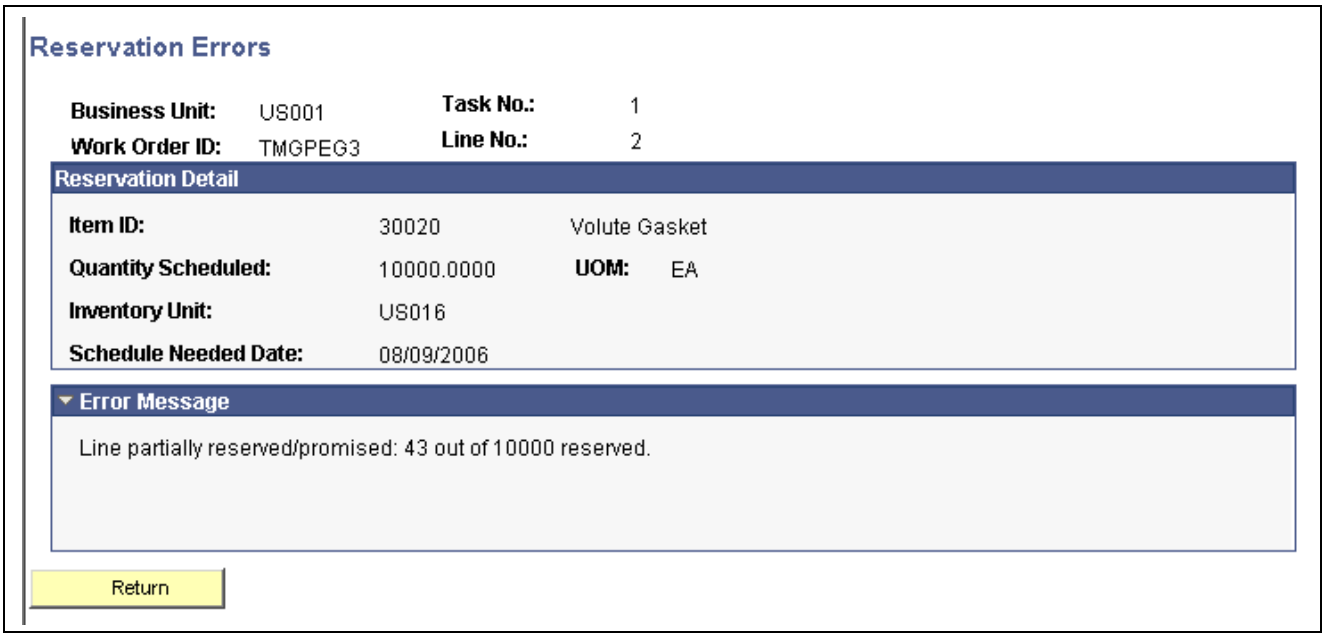
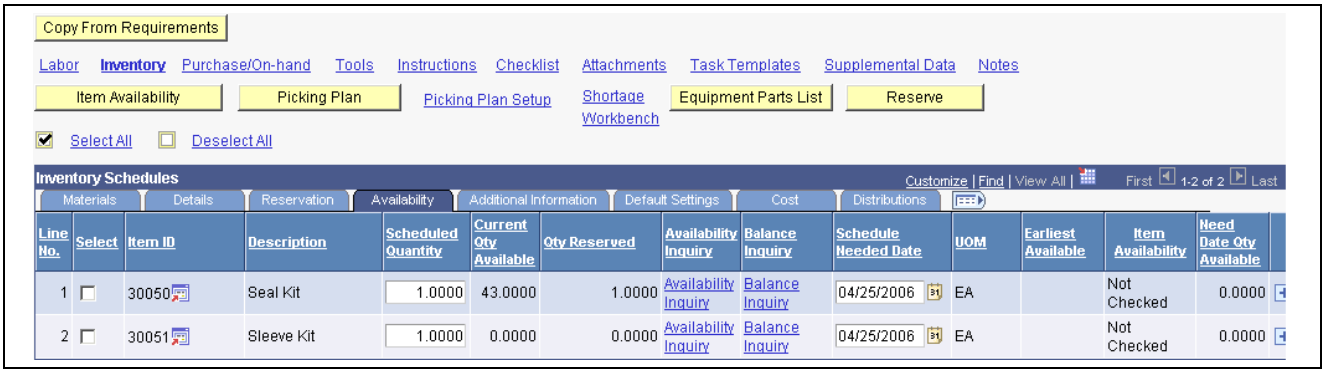


Reservation Errors page.

When you attempt to reserve an item on the Inventory Schedules grid and the system cannot reserve the item or can only partially reserve an item, you can click the Reserve Messages link to access the Reservation Errors page. This page describes reason that you could not reserve the item.

Defining the Inventory Schedules Availability Tab

Access the Inventory Schedules Availability tab on the Schedules page.



Inventory Schedules Availability tab on Schedules page

Current Qty Available (current quantity available) Displays the quantity available for the item in the Inventory business unit associated with the work order business unit.

Availability Inquiry Click this button to access the Item/Product Availability page in PeopleSoft Inventory for the selected item based on a specific date. This page shows the cumulative ATP (Available to Promise) quantity, the available quantity, and the time phased supply and demand quantities for the item.

Balance Inquiry Click this button to access the Item Balance by Unit page in PeopleSoft Inventory for the selected item. This page shows the quantity on hand, the quantity owned, the quantity available, and the quantity reserved for the item. It also shows the last adjustment, the last putaway date, the last order date and

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the last order. You can click links to access the Item Balance by All Units, the Item Balance by Location, and the Fulfillment Status components for the item.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock".

Schedule Needed Date Displays the default Schedule Date for the work order task. You can override this value and enter the date that the item is needed for the work order task. When you click the Item Availability button, the system updates the Need Date Qty Available field with the quantity available as of that date.

Earliest Available Displays a date based on selecting one or more rows then clicking the Item Availability button on the Inventory Schedules page. This date determines, based on your scheduled quantity and schedule need date, when the selected Item is available.

See Chapter 18, "Scheduling a Work Order," Inventory Item Availability, page 459.

Item Availability Displays:

- *Not Checked,* if you have not selected the Item Availability button for this row.

  If you previously checked a row for Item Availability and you modify the Item, Schedule Qty, Schedule Needed Date, or UOM values, the Earliest Available Date, Item Availability, and Need Date Qty Available field values will be initialized to *Not Checked*.

- *Yes*, if the item is available.
- *No*, if the item is not available.

  This value displays as a link, which you can select and display the Item Availability page, which contains description(s) of why the item is not available.

Need Date Qty Available(need date quantity available) Displays the quantity available on the date that you indicated you needed it for the work order task. This displays when you click the Item Availability button.

See Chapter 18, "Scheduling a Work Order," Inventory Item Availability, page 459.

Item Availability Page

Access the Item Availability page:

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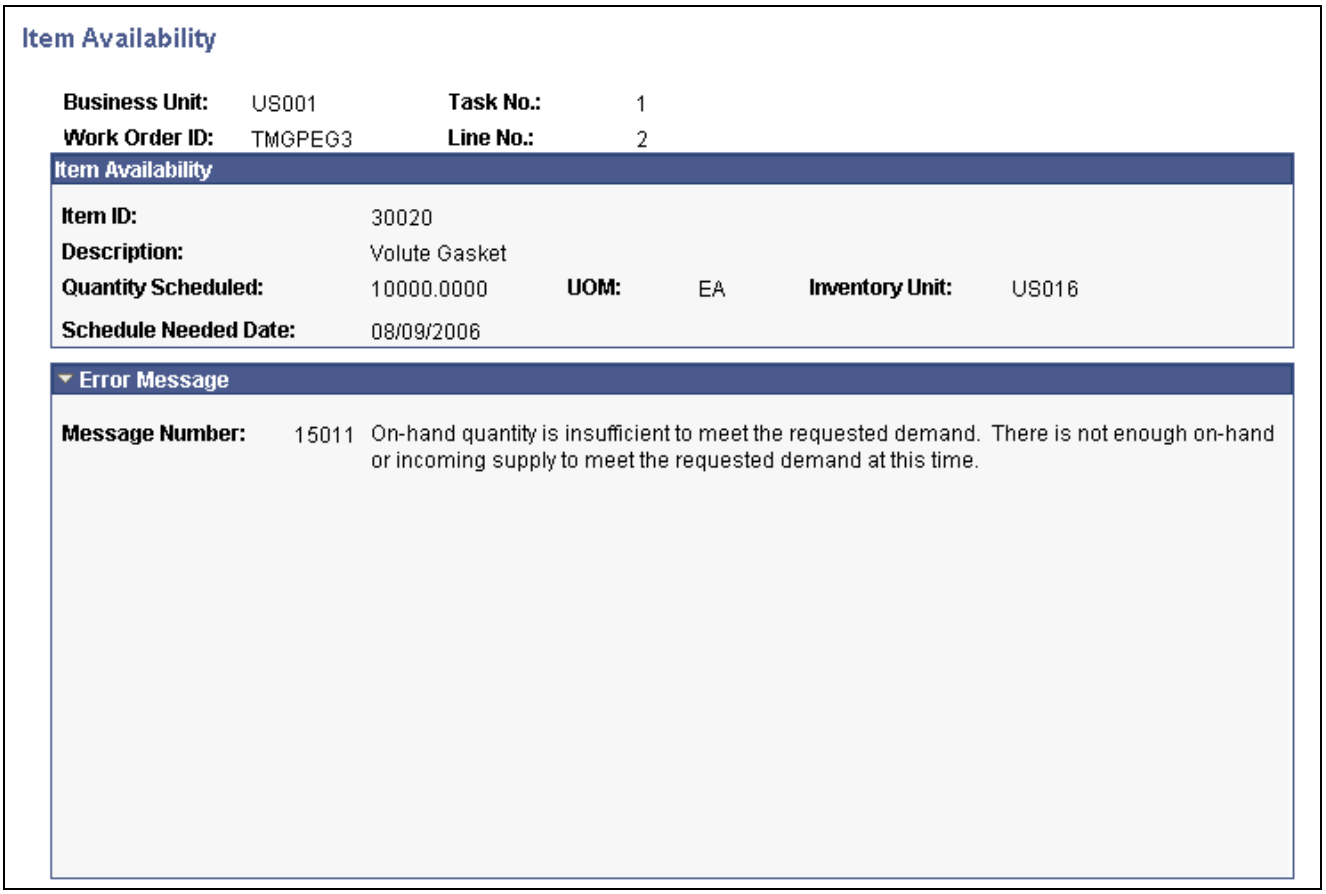
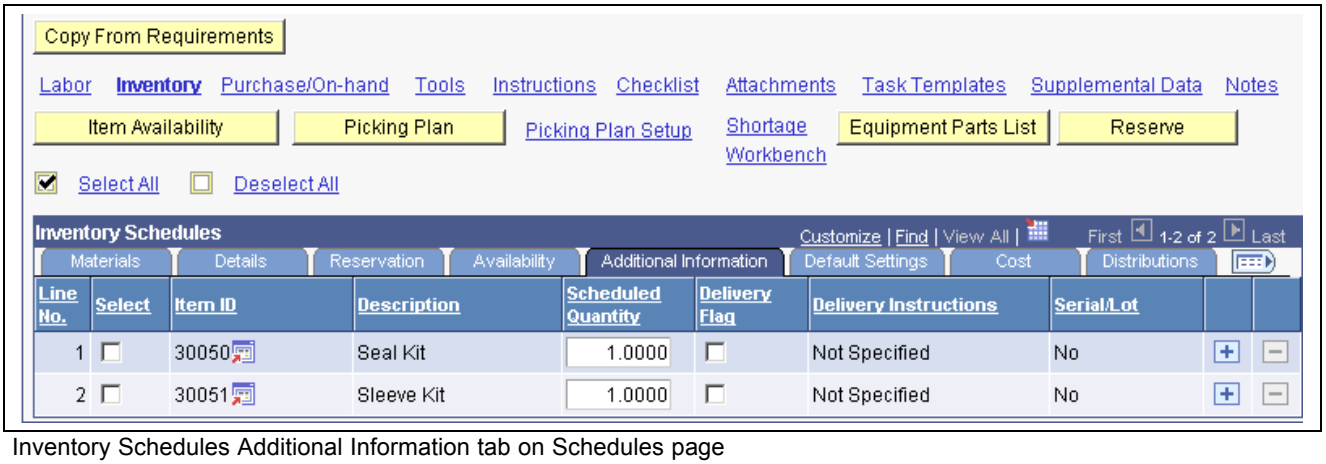


Item Availability page

When schedule an item that is unavailable and select the Item Availability button, it displays a *No* in the Item Availability field of an Inventory/Schedules row. When you click the No link, the Item Availability page appears with a message describing the error.

Defining the Inventory Schedules Additional Information Tab

Access the Inventory Schedules Additional Information tab on the Schedules page.



Inventory Schedules Additional Information tab on Schedules page

Delivery Flag Select this check box to enable you to add delivery instructions.

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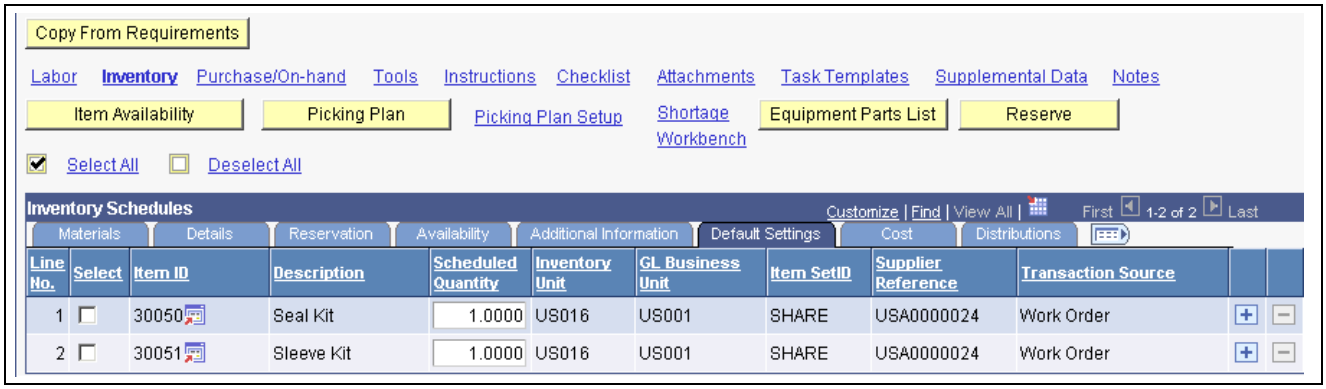
Delivery Instructions Enter instructions describing how you want the selected inventory item delivered.

Serial/Lot Displays a serial or lot numbers if the selected item is serial or lot controlled and quantities are issued to the inventory row. You can click a link to review the serial or lot numbers associated with the item.

Defining the Inventory Schedules Default Settings Tab

Access the Inventory Schedules Default Settings tab on the Schedules page.



Inventory Schedules Default Settings tab on Schedules page

Transaction Source Displays the source of the transaction. These values determine whether the transaction costs are Scheduled or Actuals. There are two integration points that can insert a row into the Inventory Schedules grid of a work order: From the pegging workbench you can peg a purchase order containing an inventory item back to a work order or you can enter a direct issue from PeopleSoft Inventory to the work order. If a transaction cost is:

- Scheduled, the system updates the Scheduled Totals on the Cost page.
- Actuals, the scheduled costs will not be added back to the work order. The Actual Totals are updated on Cost page of the work order based when you run the Cost Summarization process.

Source values are:

- *Work Order* is Scheduled
- Inventory Peg Workbench. When a row is inserted back to a work order from the pegging workbench, these costs will be considered scheduled costs.
- *Inventory Direct Issue* is Actuals. When a row is inserted back to a work order as a result of a direct issue from PeopleSoft Inventory, these costs will be considered actual costs and not rolled into the scheduled costs for the work order task.
- *Inventory Peg Workbench* if the Pegging Workbench inserts a row into the work order.

Note. For Inventory Schedules rows that are created by a direct issue from PeopleSoft Inventory, the Scheduled Quantity field will be 0 and the entire row will be disabled. The disabling of these rows prevents any changes and keeps the work order in sync with the feeder applications that created them.

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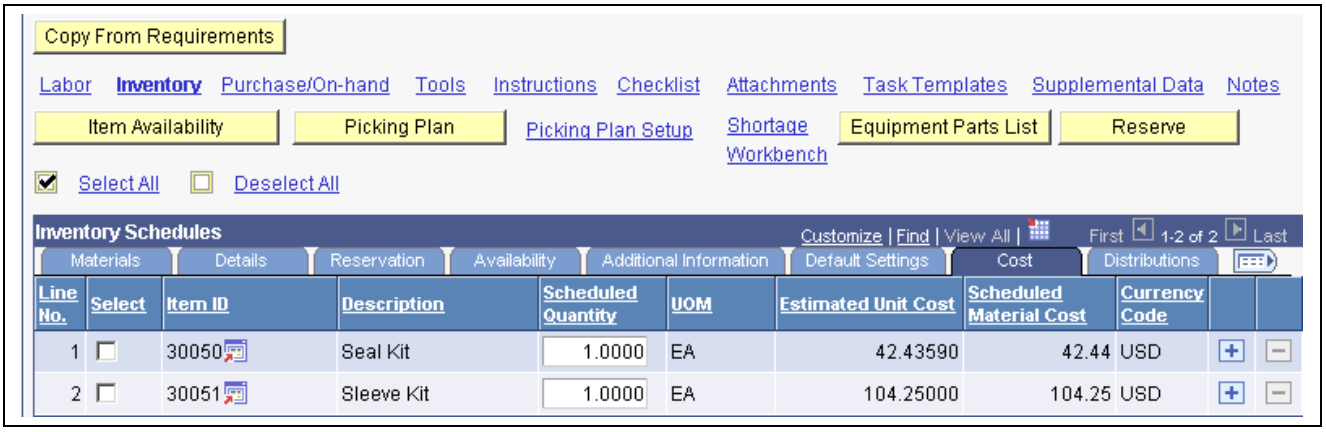
See Chapter 17, "Defining Work Order Task Requirements," Inventory Requirements, page 427.

Defining the Inventory Schedules Cost Tab

Access the Inventory Schedules Cost tab on the Schedules page.



Inventory Schedules Cost tab on Schedules page

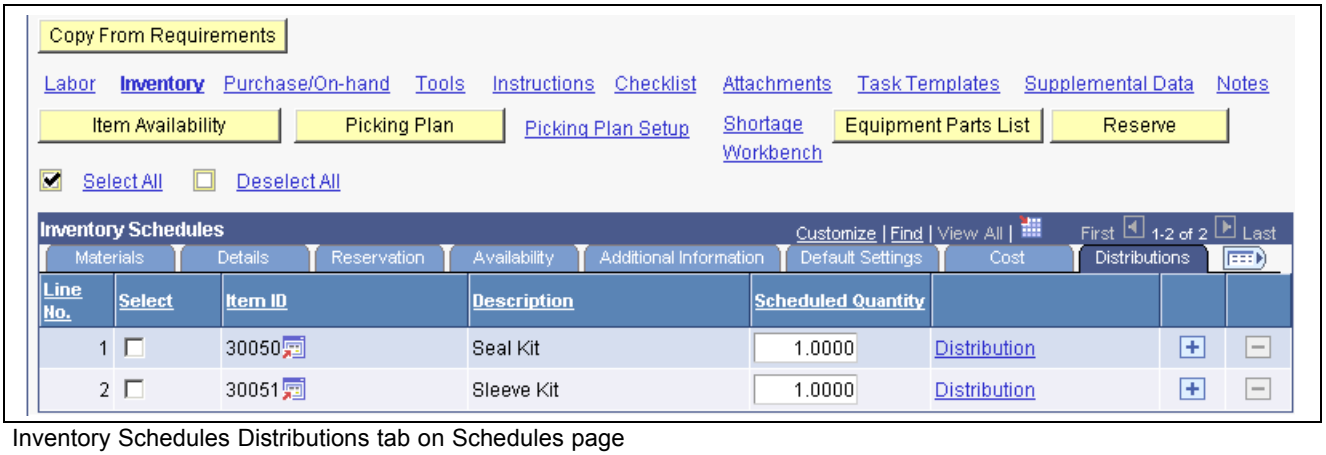
Estimated Unit Cost Displays the unit cost of the item. PeopleSoft Inventory determines the cost method of the item based on the primary book for the Inventory business unit and the cost profile of the business unit/item. For example, if the primary book for the Inventory business unit is FIN01 and the cost profile of the business unit/item is PERPAVG, the unit cost for the item will be the perpetual average cost for the item.

Scheduled Material Costs Displays unit cost of each item scheduled, which is derived from PeopleSoft Inventory, multiplied by the scheduled quantity.

Currency Code Converts Inventory currency to currency identified in the work order business unit.

Defining the Inventory Schedules Distributions Tab

Access the Inventory Schedules Distributions tab on the Schedules page.



Inventory Schedules Distributions tab on Schedules page

Distributions Click this link to access the distribution data specified for the row after an assignment has been made. You can override the values if necessary.

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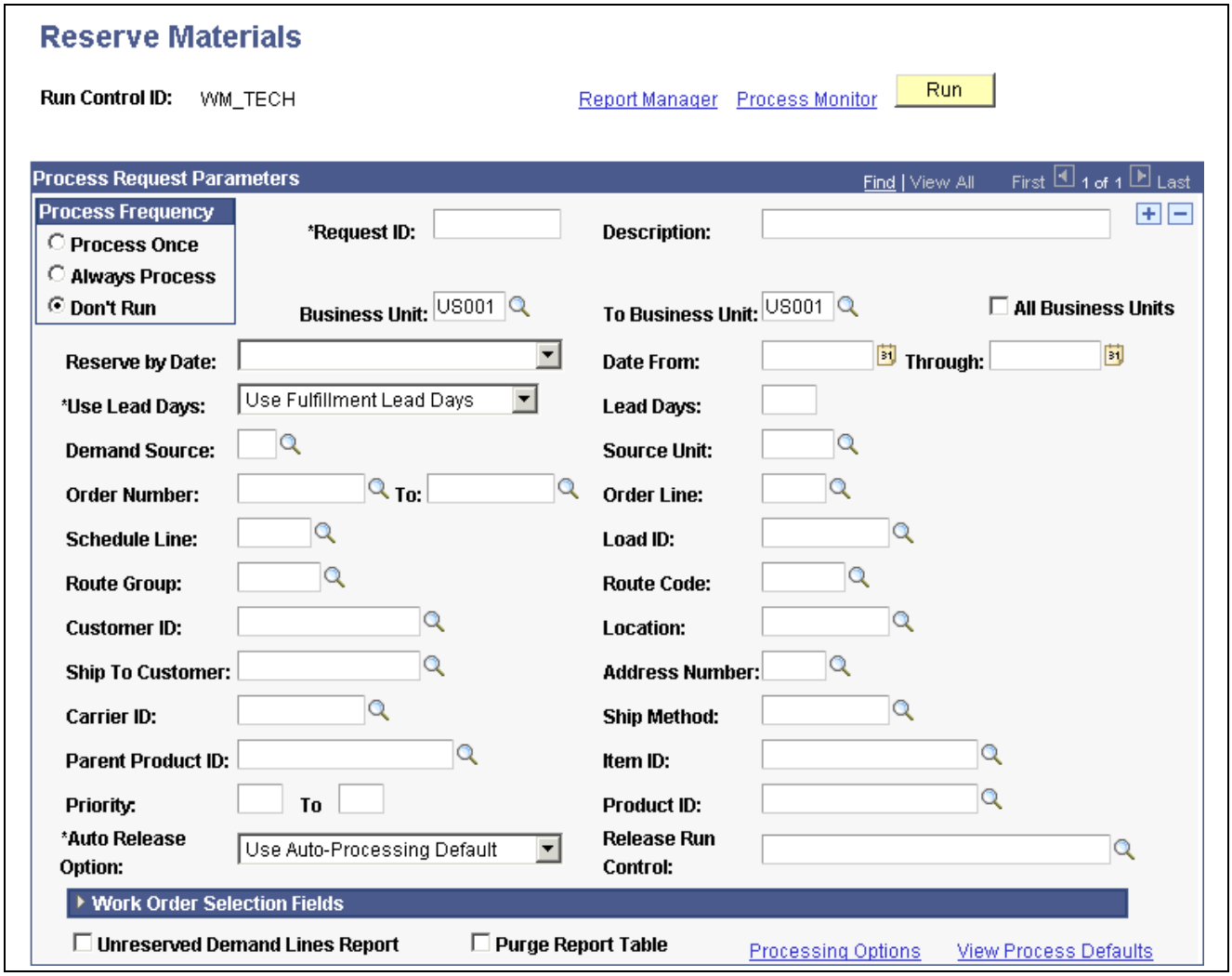
Note. This link only displays if the View and Update Accounting check box on the User Preferences - Maintenance Management page is selected for this user.

Performing Inventory Batch Reservations

Access the Reserve Batch page.



Reserve Materials page

The handling of this page for work orders is described in the PeopleSoft Inventory PeopleBook chapter, Fulfilling Work Orders from PeopleSoft Maintenance Management.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management," Committing and Reserving Work Orders.

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Scheduling Purchase/On-Hand Resources for a Work Order Task

This section describes how to:

- Assign and schedule purchased/on-hand resources for work order tasks.
- Define the Purchase/On-Hand Schedules Procurement tab.
- Define the Purchase/On-Hand Schedules Details tab.
- Define the Purchase/On-Hand Schedules Availability tab.
- Define the Purchase/On-Hand Schedules Vendor tab.
- Define the Purchase/On-Hand Schedules Default Settings tab.
- Define the Purchase/On-Hand Schedules Cost tab.
- Define the Purchase/On-Hand Schedules Distributions tab.

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Pages Used to Schedule Purchase On-Hand Resources for a Work Order Task

Page Name	Object Name	Navigation	Usage
Schedules	WM_WO_TASK_SCHED	Maintenance Management, Work Order Management, Work Order, click the Schedules tab	Enter resource schedules for work order tasks.
Purchase Orders	WM_WO_PO_INQ	• Select the Procurement Inquiry button on the Schedules page. • Maintenance Management, Inquiries, Purchasing and Pegging	Review any purchase orders or requisitions associated with work orders and work order tasks.
Requisitions	WM_WO_PO_INQ	• Select the Procurement Inquiry button on the Schedules page and select the Requisitions tab. • Maintenance Management, Inquiries, Purchasing and Pegging	Review any purchase orders or requisitions associated with work orders and work order tasks.
Maintain Purchase Order	PO_LINE	• Click the Add Purchase Order button on the Schedules page. • Purchasing, Purchase Orders, Add/Update POs	Add a purchase order based on a work order task to purchase labor, materials, or tools identified in the Purchase/On Hand Schedules grid.
Maintain Requisitions	REQ_FORM	• Click the Add Requisition button on the Schedules page. • Purchasing, Requisitions, Add/Update Requisitions	Add requisition based on a work order task to purchase labor, materials, or tools identified in the Purchase/On Hand Schedules grid.
Item Availability	WM_WO_ITMAVAIL_SEC	Click the Item Availability link in the Schedules page - Purchase/On-hand Schedules Availability tab.	Review availability of an item or reason item is not available.

Assigning and Scheduling Purchase/On-Hand Resources for Work Order Tasks

Access the Purchase/On-Hand grid on the Schedules page.

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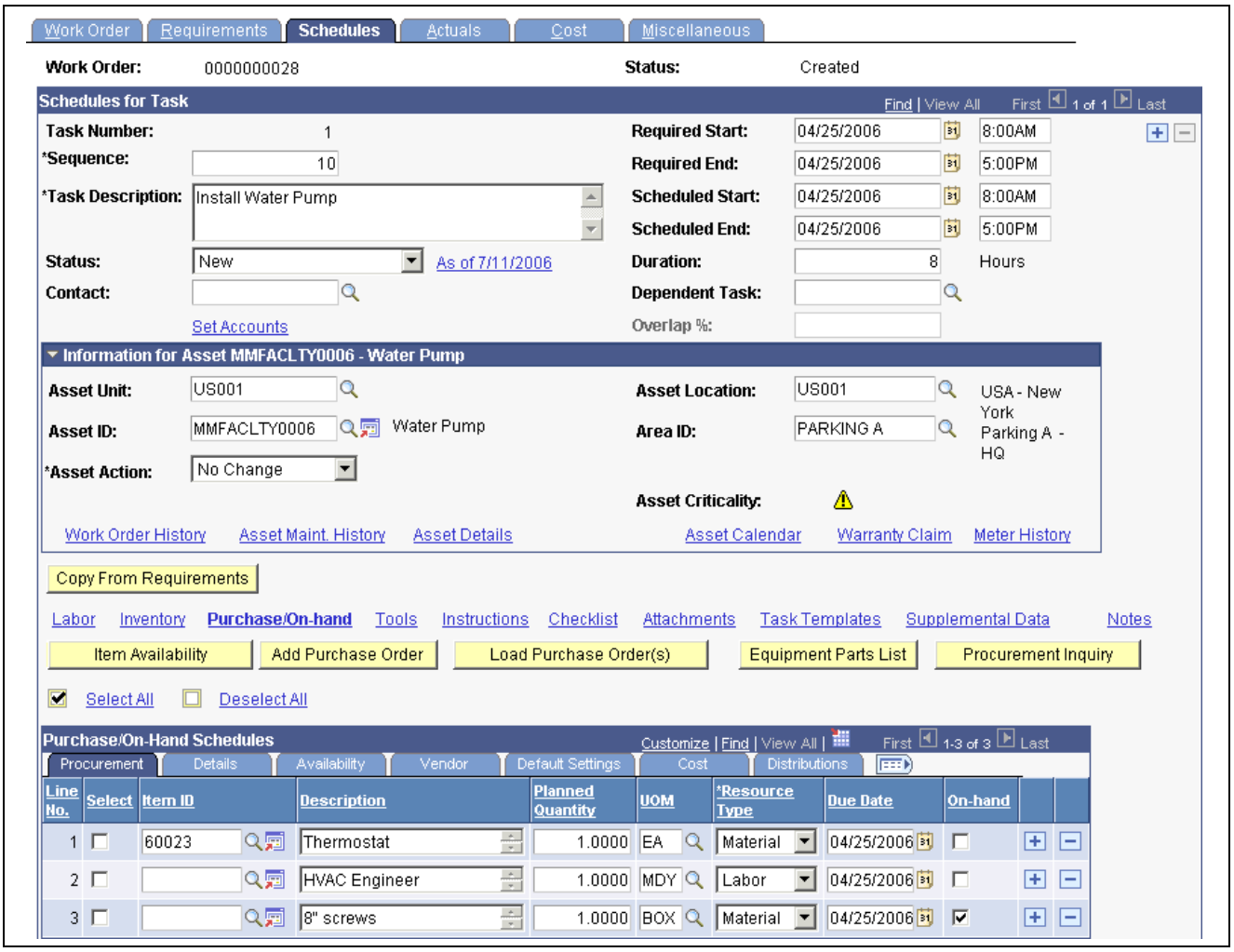

Schedules page - Purchase/On-Hand Schedules grid

Item Availability

Select one or more rows and click this button to determine if the selected items are available as of the due date. The row must be pegged before you can determine if an item is available.

See Chapter 18, "Scheduling a Work Order," Procurement of Material, Labor, and Tool Resources Using the Purchase/On-Hand Schedules Grid, page 464.

Add Purchase Order or **Add Requisition**

Click this button to access the Add/Update Purchase Order or the Add/Update Requisition component to create a purchase order or requisition. The button that displays in the work order depends on your selection of either *Purchase Order* or *Requisition* on the work order business unit's Integrations page.

Load Purchase Order(s) or **Load Requisition(s)**

Select the resource lines for which you intend to create Purchase Orders (or requisitions) and then click the Load Purchase Order(s) button for a work order task. The selected rows are then staged into the purchasing related stage records (PO_ITM_STG and PO_DIST_STG). Once the rows are staged, you must access PeopleSoft Purchasing to run either the PO Auto Sourcing process or the PO Calculations and PO Creation processes to create the purchase order. This stages the purchase orders. When you click the Load Requisition(s) button, this flags the selected work order rows and you then must access PeopleSoft Purchasing to run the Load Requisitions process.

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Note. Normally, organizations schedule PO Auto Sourcing, PO Calculations, PO Creation, and Load Requisitions to run automatically at regular intervals.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Creating Requisitions Online".

Equipment Parts List Click this button to access the Equipment Part List Selection page. This button only appears on the page if the asset selected for this work order task is associated with one or more EPL templates that contain noninventory or open description items.

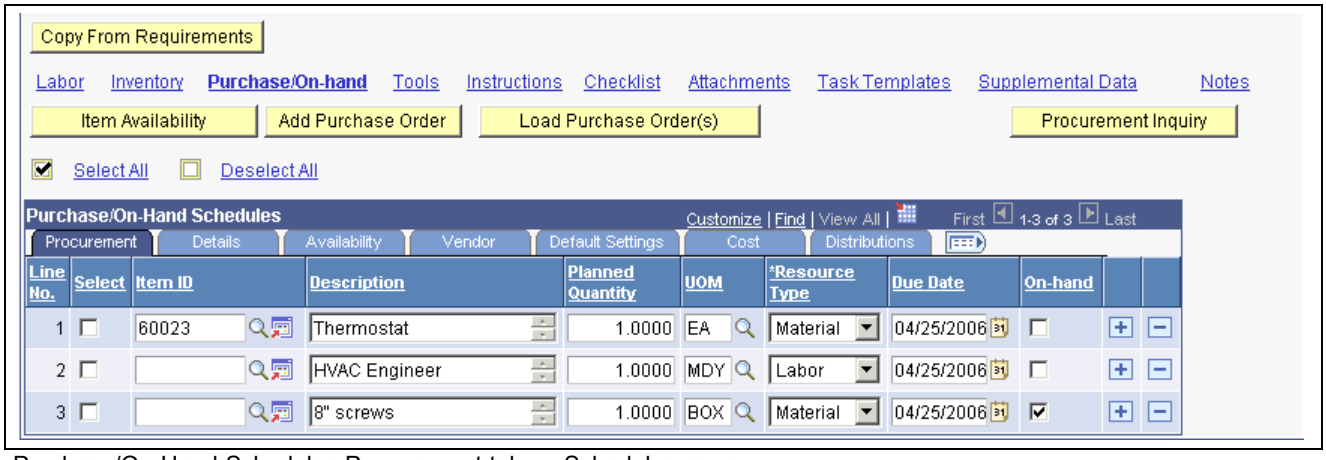
Note. Inventory items are not included in the item list that displays based on the selected template.

See Chapter 18, "Scheduling a Work Order," Inventory Resource Scheduling, page 451.

Procurement Inquiry Click this button to access the Work Order Procurement Inquiry component in Maintenance Management. This inquiry displays all the purchase orders and requisitions that are associated with this work order task.

Defining the Purchase/On-Hand Schedules Procurement Tab

Access the Purchase/On-Hand Schedules - Procurement tab.



Purchase/On-Hand Schedules Procurement tab on Schedules page

Item ID Select either a noninventory item or enter an open description which may be used to purchase material, labor, or tools for the work order task. You can also select from an EPL, if the asset being worked on has an associated EPL that contains noninventory and open description rows.

Planned Quantity Enter the quantity of the item that you want to purchase or is on hand.

Resource Type Identify whether the resource that requires purchasing or is identified as on-hand is *Material*, *Labor*, or a *Tool.*

Due Date Select the date the quantity is needed for the work order task. The scheduled date for the work order task is the default value, which you can override.

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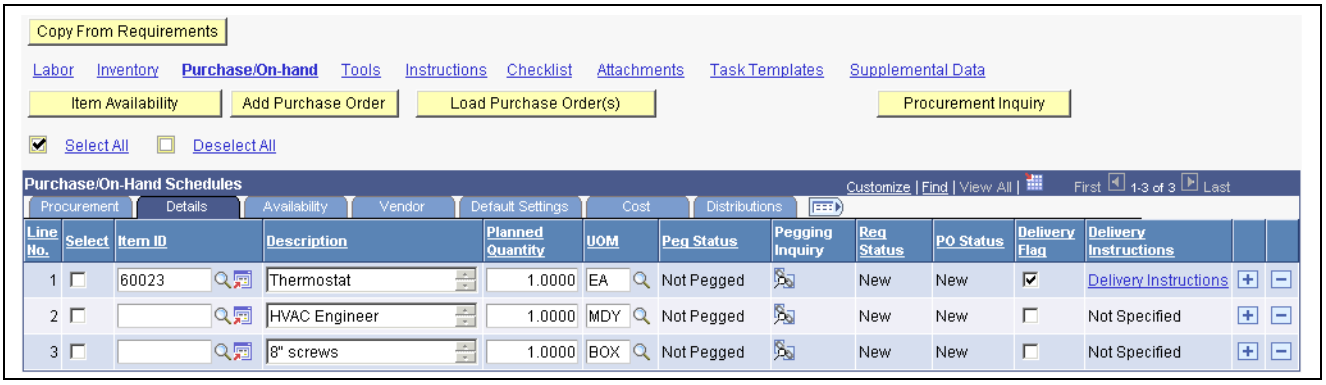
On-Hand Select this check box to identify that the resource that you are scheduling are currently on-hand. On-hand rows are not costed.

Defining the Purchase/On-Hand Schedules Details Tab

Access the Purchase/On-Hand Schedules - Details tab.



Purchase/On-Hand Schedules Details tab on Schedules page

Peg Status Displays the pegging status.

- *Open*

  Quantity is pegged to supply (Requisition, PO)

- *Not Pegged*

  The quantity needed of the selected item is not pegged to supply (Requisition, PO).

- *Completed*

  Scheduled PO rows for noninventory items do not always require receiving. The PO carries an attribute that determines if receiving is required. If receiving is required, the peg status is set to *Complete* when the parts are fully received based on the PO's receipt process. If receiving is not required, then the peg status is set to *Complete* when the PO is closed.

- *Canceled*

  This indicates that the requisition or the PO to which the work order is pegged has been canceled. It also can indicate that scheduled quantity of the work order has been decreased so that the quantity pegged was decreased to zero, and the work order row is not pegged to any other supply.

The peg statuses are:

Note. When you either add a purchase order or requisition in PeopleSoft Purchasing and tie it to a work order, or you load the row to create a purchase order or requisition, the selected quantities are automatically pegged.

Pegging Inquiry Review this inquiry to track the quantities pegged for this work order task. You can access this inquiry only after the row quantities are pegged.

Note. The Pegging Inquiry for Inventory and Purchase/On-Hand schedules are the same.

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Req Status (requisition status) and **PO Status**

Displays the current status of a requisition or purchase order depending on work order business unit selection, associated with this row. . These statuses are owned by PeopleSoft Maintenance Management and are used to define the stage of the procurement status. The status values are:

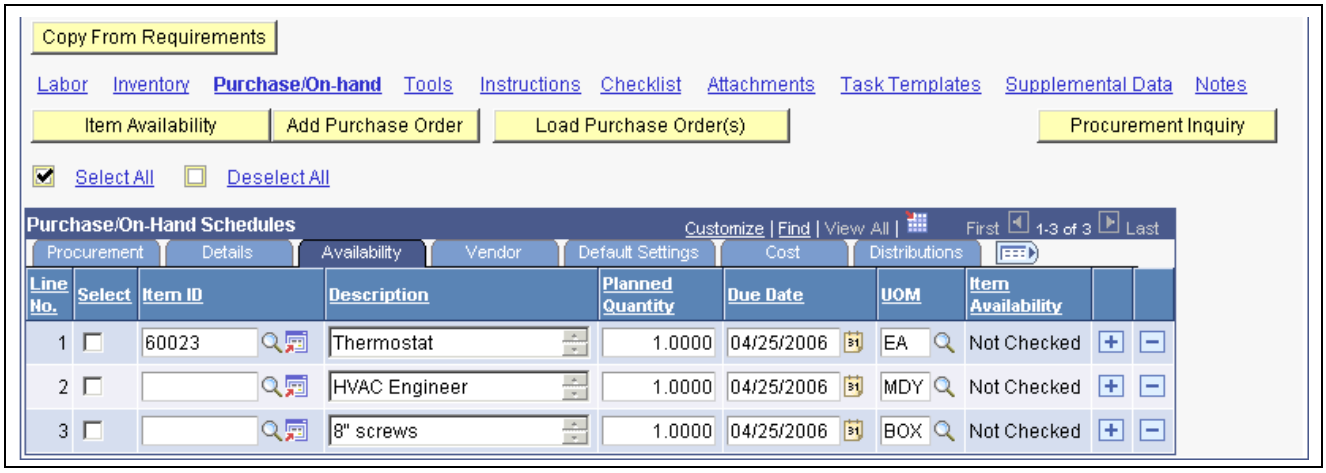
- New, which is the default status when you add a new Purchase/On-Hand Schedules row is added to the work order task.
- Ready to Stage, which displays when you select the Load Req or PO button for the selected rows.
- In Process, which displays when you select the Load Req or PO button indicates that the selected rows have been staged, and the processing when you click the Save button has completed.

  This status signals that the selected rows are in the Req Load or PO Load process. You must run the Req Loader or PO Load processes to create the Requisition or PO.
- Complete, which displays when the staging process completes successfully and a Requisition or PO is created.

  The status can also display as *Complete* if the row was backward tied from a Requisition or PO to a work order.

Defining the Purchase/On-Hand Schedules Availability Tab

Access the Purchase/On-Hand Schedules - Availability tab.



Purchase/On-Hand Schedules Availability tab on Schedules page

Item Availability

Yes, if the quantity is available.

- *No* link after you select the Item Availability button. Click the link to access the Item Availability page, which describes the reason(s) the item is not available.
- *Not Checked,* if you have not clicked the Item Availability button.

  If you previously checked a row for Item Availability and you modify the Item, Planned Qty, Due Date, or UOM values, the Earliest Available Date, Item Availability, and Need Date Qty Available field values will be initialized to *Not Checked*.

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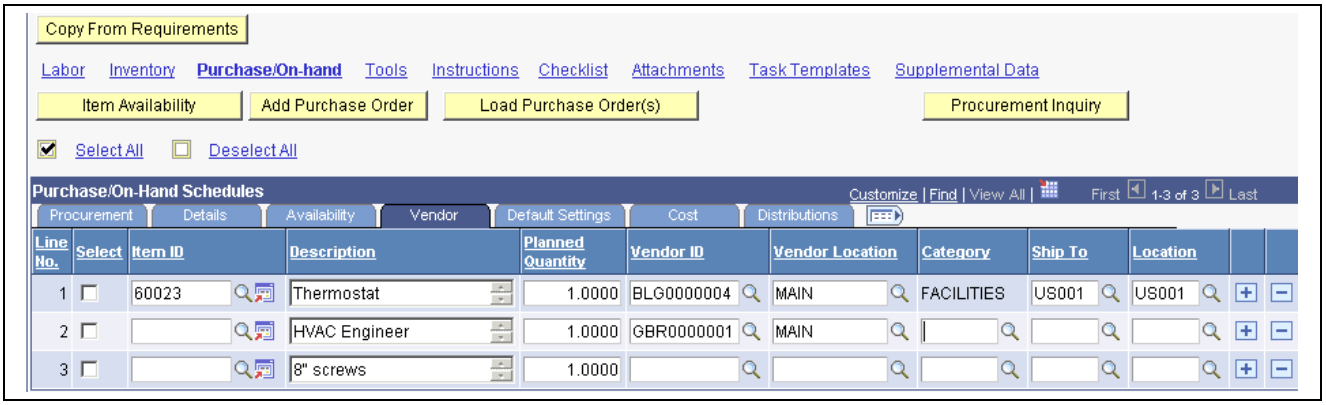
Defining the Purchase/On-Hand Schedules Vendor Tab

Access the Purchase/On-Hand Schedules - Vendor tab.



Purchase/On-Hand Schedules Vendor tab on Schedules page

Vendor ID and **Vendor Location** — Select a vendor ID from which to purchase this resource. The default value for the Vendor Location field is based on the vendor selection.

Note. These values are *required* if using a Purchase Order and *optional* if using a requisition.

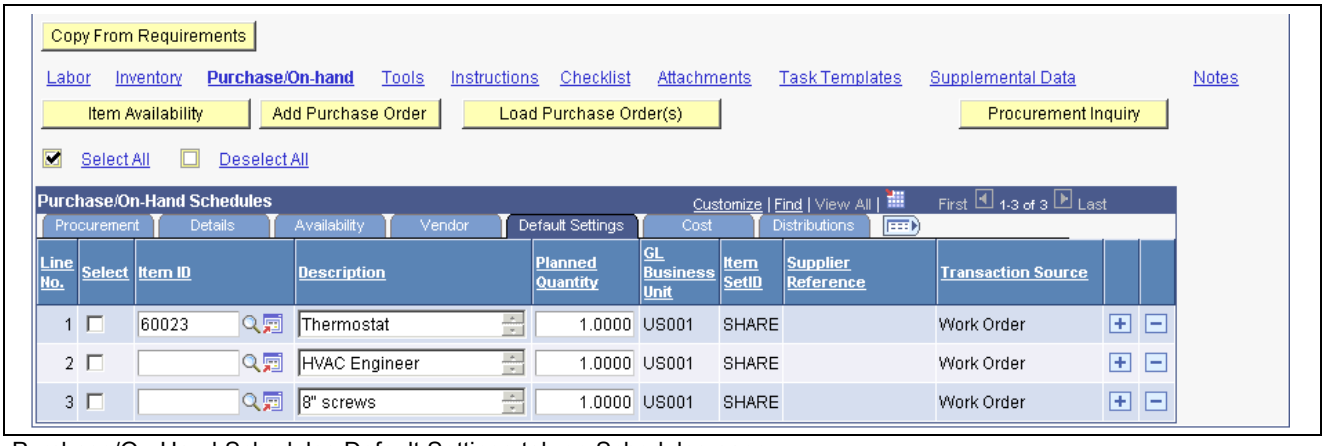
Category — Enter this value if this is an open description row. A default value displays based on the noninventory item selected.

Ship To — Select the location in which you want to ship this resource.

Location — Displays default value based on the selected work order task location.

Defining the Purchase/On-Hand Schedules Default Settings Tab

Access the Purchase/On-Hand Schedules - Default Settings tab.



Purchase/On-Hand Schedules Default Settings tab on Schedules page

GL Business Unit — Displays default value from the work order business unit.

Item SetID — Displays the setID used to create the item in Items, Define Items and Attributes.

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Supplier Reference Displays the supplier of the part if the row is copied from an Equipment Parts List row and is defined on the EPL.

Transaction Source Identifies the source of the purchasing transaction and determines whether the transactions are considered Scheduled or Actuals. if a transaction source is Scheduled, the Total Scheduled Costs display on the Cost page of the work order. If a transaction source is Actuals, you must run the Cost Summarization process to view the Total Actual Costs on the Cost page of the work order.

If a transaction source is Scheduled

If a transaction source is Actuals and is returned from a feeder application like inventory direct issues, or purchase/on hand actuals like Pcard, or Voucher we populate the Schedule qty (Inventory grid) and Planned Qty (Purchase/on-hand grid) with 0 (zero). A transaction source is used to isolate the costs in a work order form integration points.

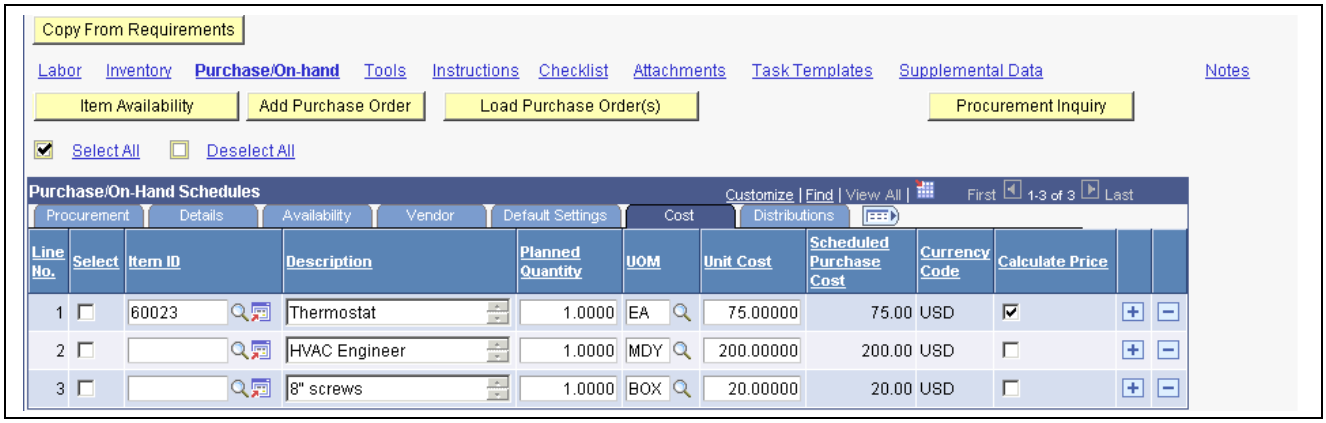
Source values include:

- 04 = *Purchase Requisition* is considered Scheduled.
- 05 = *Purchase Order* is considered Scheduled.
- 06 = *P-Card* is considered Actuals.
- 07 = *Vouchers* is considered Actuals.

Note. For Purchase/On-Hand Schedules rows that are created from either a Pcard or Voucher, the value in the Planned Quantity field value will be zero, and the row will be disabled. The disabling of these rows prevents any changes and keeps the work order in sync with the feeder applications that created them.

Defining the Purchase/On-Hand Schedules Cost Tab

Access the Purchase/On-Hand Schedules - Cost tab.



Purchase/On-Hand Schedules Cost tab on Schedules page

Unit Cost Enter the cost of this resource per unit for open descriptions items. Displays the item's purchasing attributes standard cost if defined for the item.

Scheduled Purchase Cost The system multiplies the planned quantity times the unit cost to display the Scheduled Purchase Cost value.

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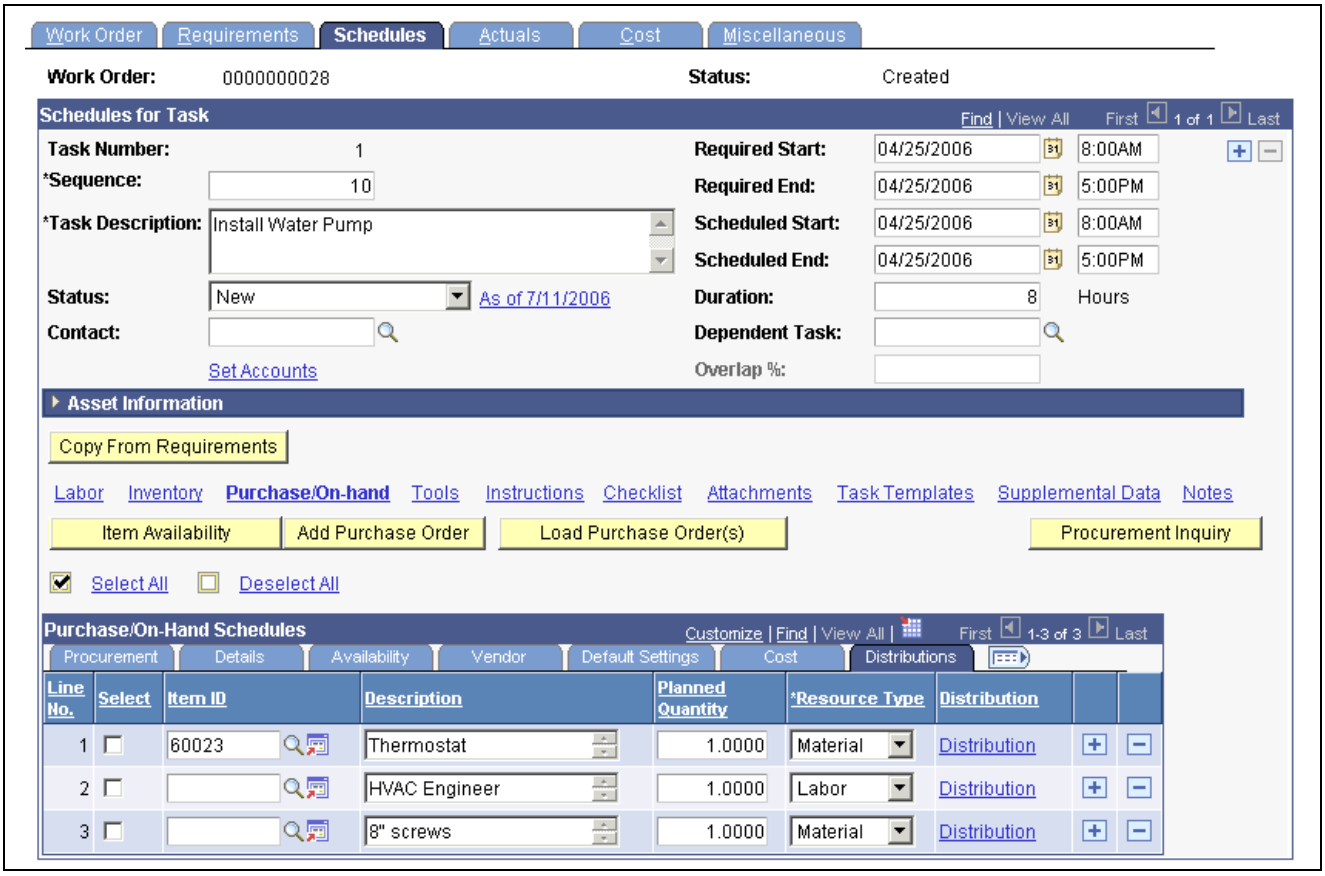
Calculate Price Select this check box to enable the PO Calculations process to calculate the cost of the item based on vendor and other rules. If cleared, the PO Calculations process uses the cost specified.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Using Purchase Order Sourcing," Understanding the PO Calculations Process.

Currency Code Displays value set up in the work order business unit. No matter what currency is used in PeopleSoft Purchasing or PeopleSoft Payables, the amounts are converted back to the currency set up in the work order business unit before they are displayed in this row.

Defining the Purchase/On-Hand Schedules Distributions Tab

Access the Purchase/On-Hand Schedules - Distributions tab.



Purchase/On-Hand Schedules Distributions tab on Schedules page

Distributions Click this link to display the distribution data for the specified row after an assignment has been made. You can override these fields, if necessary. .

Note. This link only displays if the Review and Update Accounting check box is selected on the User Preferences - Maintenance Management page for this user.

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Scheduling Tool Resources for a Work Order Task

This section describes how to:

- Assign and schedule tool resources for a work order task.
- Define the Tool Schedules Assignments tab.
- Define the Tool Schedules Details tab.
- Define the Tool Schedules Timetable tab.
- Define the Tool Schedules Cost tab.
- Define the Tool Schedules Distributions tab.
- Review messages.

Pages Used to Schedule Tool Resources for a Work Order Task

Page Name	Object Name	Navigation	Usage
Schedules	WM_WO_TASK_SCHED	Maintenance Management, Work Order Management, Work Order, click the Schedules tab	Enter resource schedules for work order tasks.
Asset Search	WM_ASSET_SRCH_SEC	Click the Search link in the Tool Schedules - Assignments tab on the Schedules page.	Search for a tool in the asset repository.
Asset Monthly Schedule	RS_ASSET_MONTH	Click the Asset's Calendar link in the Work Order Tasks - Asset Information collapsible section.	View an asset's monthly schedule and click a date to modify the details or access the asset's daily schedule.
Task Details	RS_ASSET_MONTH	Click a date in the Asset Monthly Schedule.	View, update, or modify details about a work order's task's asset's monthly schedule, or access an asset's daily schedule.
Asset Daily Schedule	RS_ASSET_DAILY	Click the Asset Daily Schedule link on the Task Details page.	View a work order task's asset's daily schedule, or click a time of day link to return to the Task Details page.

Assigning and Scheduling Tool Resources for a Work Order Task

Access the Tool Schedules grid on the Schedules page.

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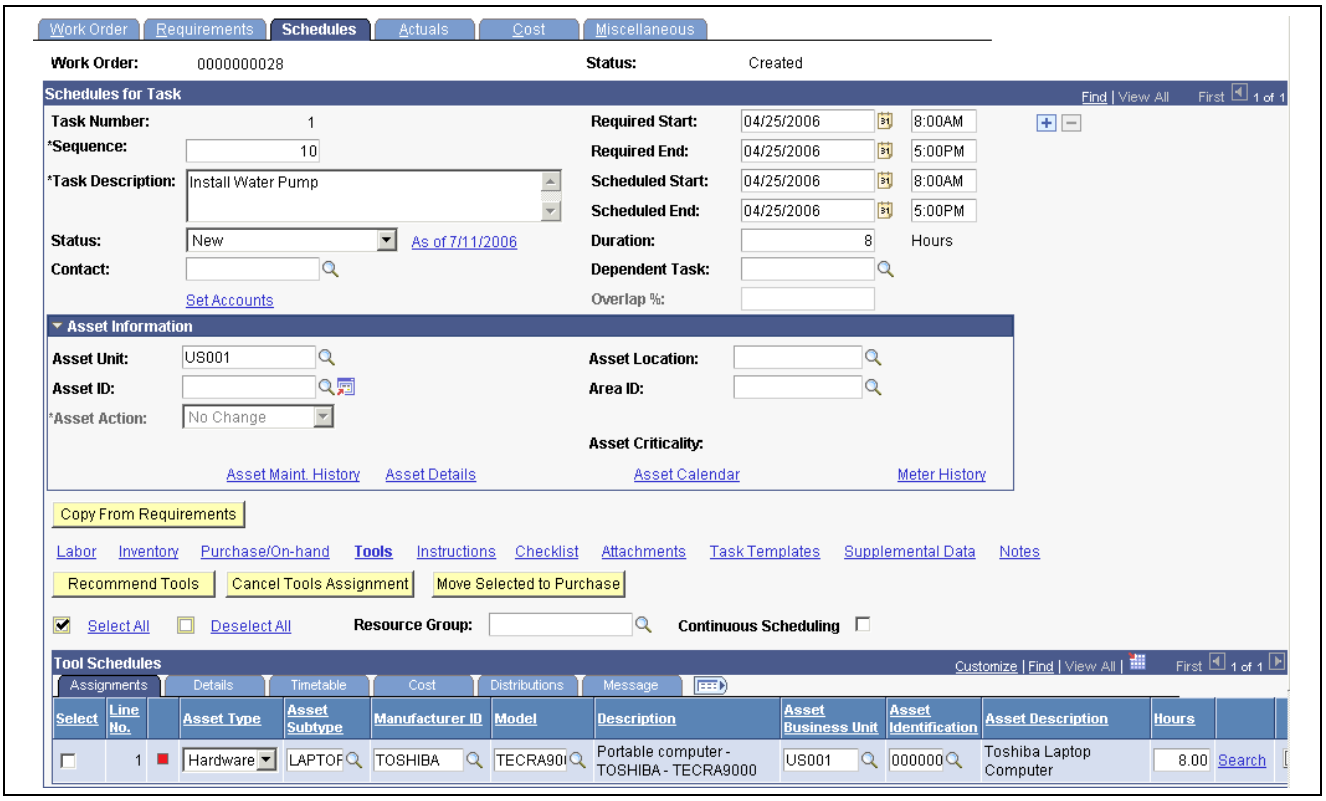

Schedules page - Tool Schedules grid

Recommend Tools Select a resource group ID, if set up, and click the Recommend Resource button to run the Resource Match engine, which recommends resources that meet the tools requirements based on availability.

Cancel Tools Assignment Select one or more appropriate tools resource rows and then select this button to cancel the tool assignment.

Move Selected to Purchase Click this button to move selected tool rows that need to be purchased to the Purchase/On-Hand grid. The rows are removed from the Tools Schedules grid.

Resource Group Select a tools resource group to narrow your search when you select the Recommend Tools button.

Continuous Scheduling Click this check box to indicate to the Resource Matching process that you only want to search for tools that are available for a continuous block of time.

Defining the Tool Schedules Assignments tab

Access the Tool Schedules Assignments tab on the Schedules page.

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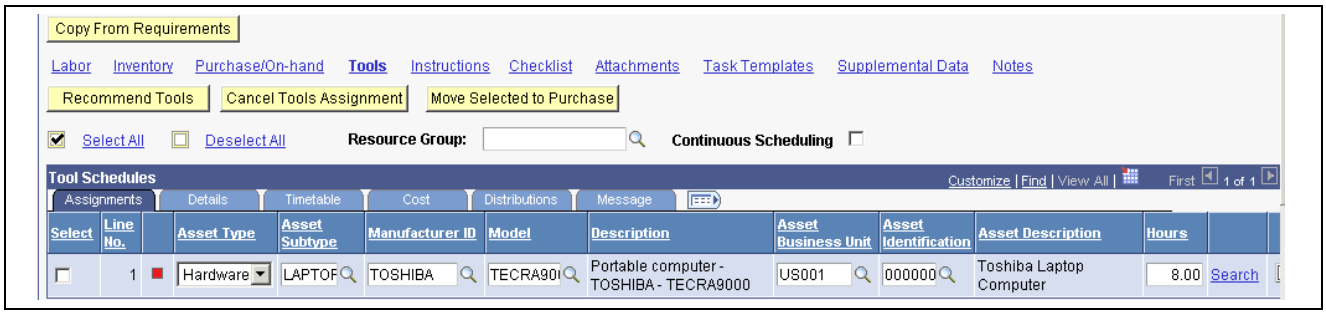

Schedules page - Tools Schedules Assignments tab

or	Displays either an error icon or a warning icon for a selected tool line, if there is a problem with your selection. A warning or error triggers the display of the Message tab.
Asset Type, Asset Subtype, Manufacturing ID, and **Model**	Select these values for a tool manually or copy the requirements from the task and then click the Recommend Tools button to determine the availability of the tools in PeopleSoft Asset Management's asset repository based on running the Resource Match engine.
Asset Business Unit	Displays default value from the Asset Management business unit in the work order task or work order. You can override this value. This is also used by the Match Engine to calculate the qualification fit score for the recommended tools.
Asset Identification	Select a specific asset ID, Tag Number, Serial ID, or Vehicle ID Number (depending on the setup if the work order business unit) if you are manually selecting a tool for this task.
Hours	Enter the specific number of hours that you plan to use the tool, which updates the tool's schedule.
Search	Click this link to access the Asset Search page and search for a tool based on the availability of the resource.
	Click this icon to access the Asset Monthly Calendar. This calendar identifies when this tool is not available and is considered when the Resource Match Engine or Asset Search is run.

See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Labor and Tools Resource Setup and Maintenance, page 165.

Defining the Tool Schedules Details Tab

Access the Tool Schedules Details tab on the Schedules page.

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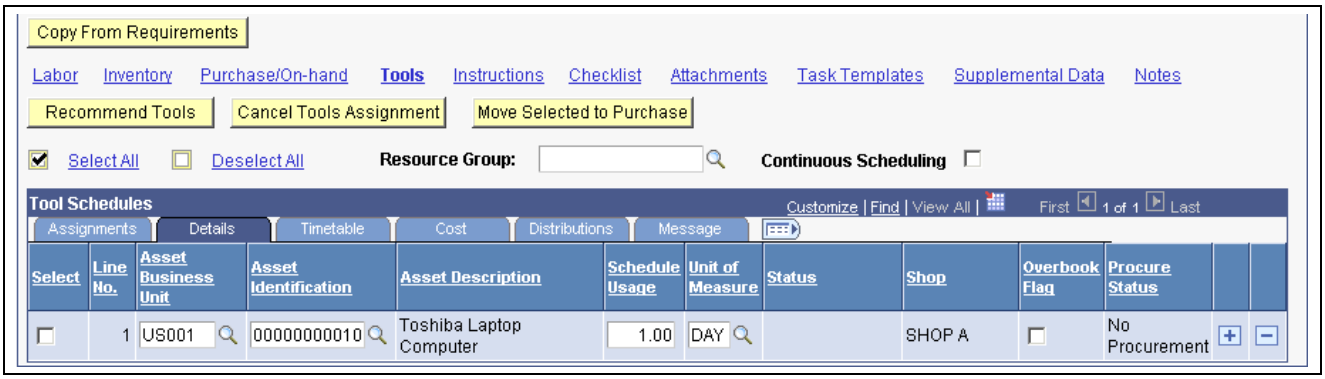


Schedules page - Tool Schedules Details tab

Scheduled Usage Enter the usage dictated by the terms for renting or obtaining the tools. For example, a truck may rent for $20.00/day, therefore, you enter 1 day. The default value for the unit of measure (UOM) is derived either from tool rates set up in the shop or from the Asset Subtype definition. If a default value does not appear in the field, you can select a UOM value.

Status Displays the assignment status for the tool as:

- *Assigned*
- *Canceled*
- *Complete*

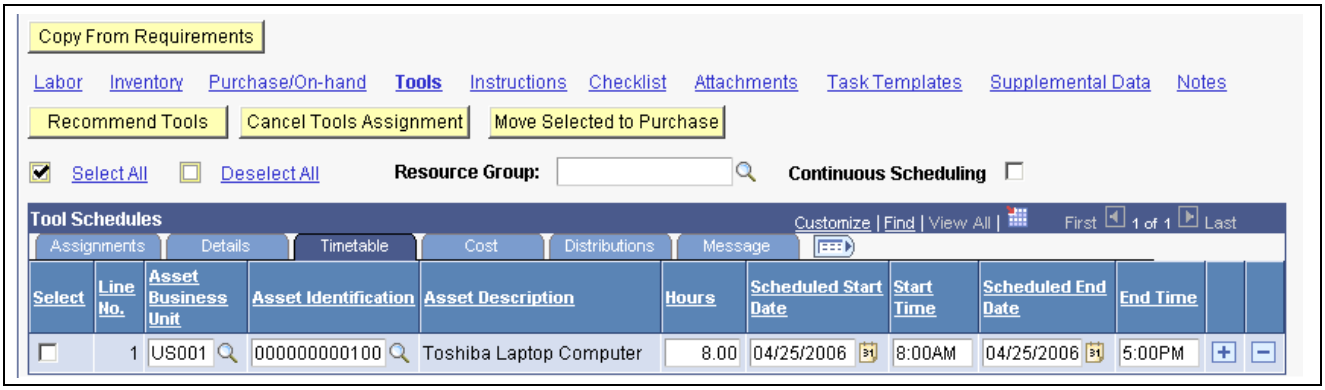
Overbook Flag Select this check box to allow the overbooking of a resource. Leave this check box blank if you do not want to allow overbooking for this resource.

Important! This option displays only if you clicked the Require Manual Override button in the shop associated with this work order.

Procure Status Indicates the status of a tool that is being procured if you clicked the Move Selected to Purchase button. If the tool does not need to be procured, the default status is *No Procurement*.

Defining the Tool Schedules Timetable Tab

Access the Tool Schedules Timetable tab on the Schedules page.



Schedules page - Tool Schedules Timetable tab

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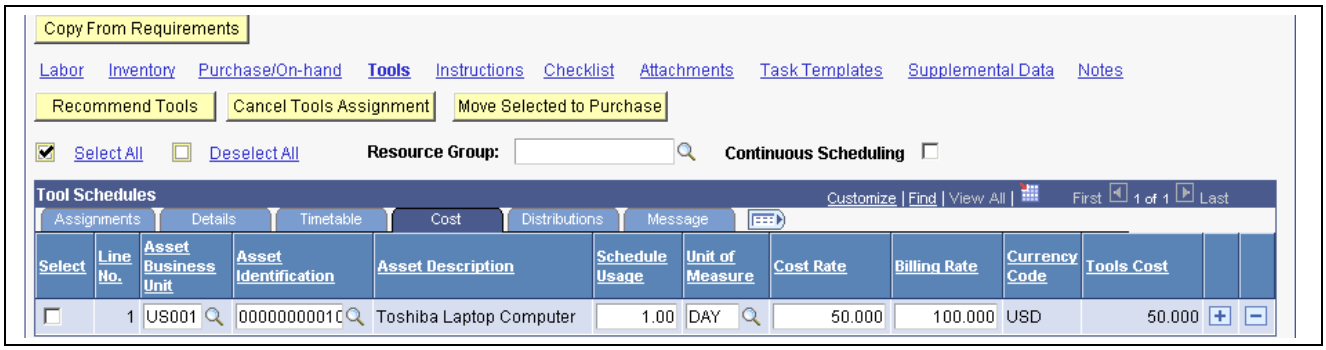
Scheduled Start Date, Start Time, Scheduled End Date, and **End Time** — Enter the dates and times to use this tool for the work order task. Default values derived from the scheduled dates and times for the work order task. These dates and times cannot exceed the scheduled dates and times of the work order task.

Defining the Tool Schedules Cost Tab

Access the Tool Schedules Cost tab on the Schedules page.



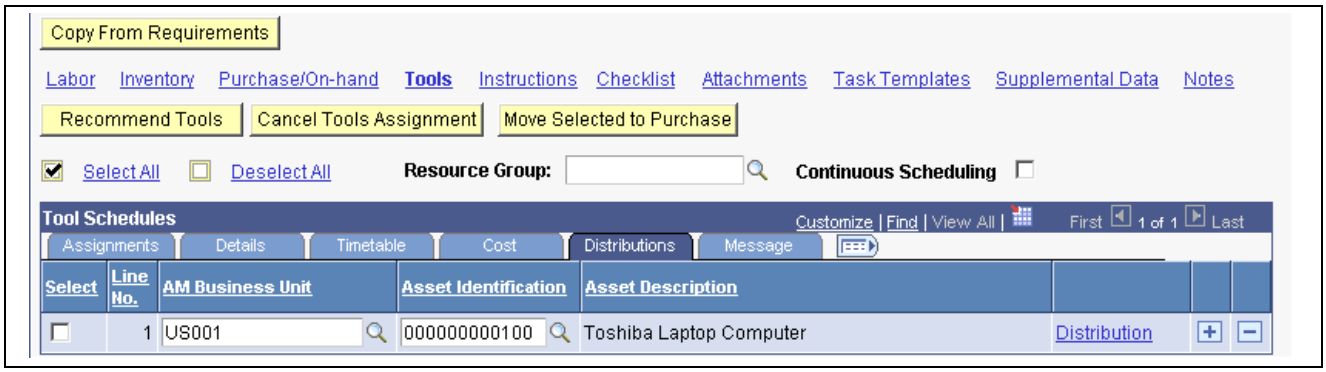
Schedules page - Tool Schedules Cost tab

Cost Rate and **Billing Rate** — Displays rates set up in the shop's Tools page and multiplies them times the scheduled usage to obtain the total cost for using the tools.

Tools Cost — Save the page after entering or accepting the values of the Cost Rate and Billing Rate and the system performs the cost calculations and generates the Tool Cost value.

Defining the Tool Schedules Distributions Tab

Access the Tool Schedules Distributions tab on the Schedules page.



Schedules page - Tool Schedules Distributions tab

Distributions — Click this link to access the distribution data specified for the row after an assignment has been made. You can override these values, if necessary.

Note. This link only displays if the View and Update Accounting check box is selected on the User Preferences - Maintenance Management page for this user.

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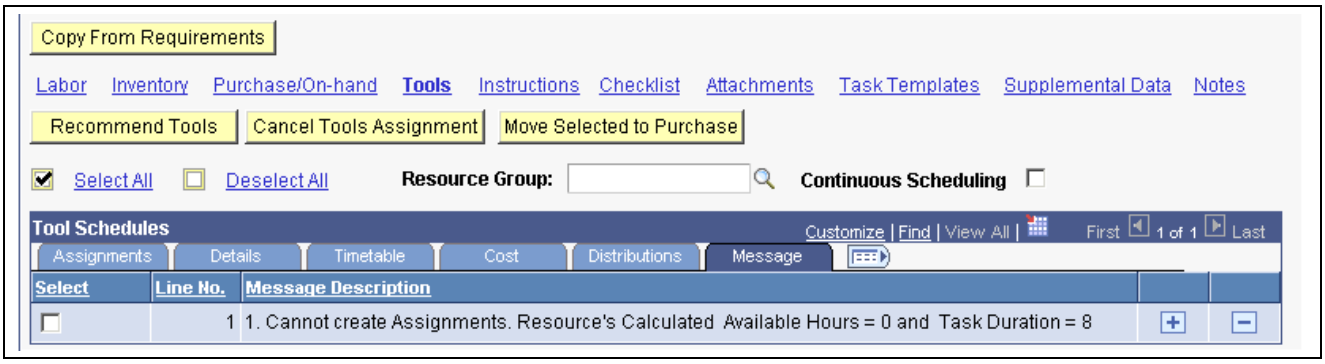
Reviewing Messages

Access the Message tab on the Schedules page.



Schedules page - Tool Schedules Message tab

Important! This tab only displays if a warning or error icon displays for a selected tool.

Line No.(line number) Indicates the task line number on which the error or warning occurred.

Message Description Describes the reason why the warning or error occurred for the line.

Managing Schedules Using the Work Order Workbench

This section describes how to:

- Use the Work Order Workbench.
- Create a work order task search view.
- Use the Task Overview tab in the Work Order Workbench.
- Use the Schedules tab in the Work Order Workbench.
- Use the Resources tab in the Work Order Workbench.
- Use the Asset Information tab in the Work Order Workbench.

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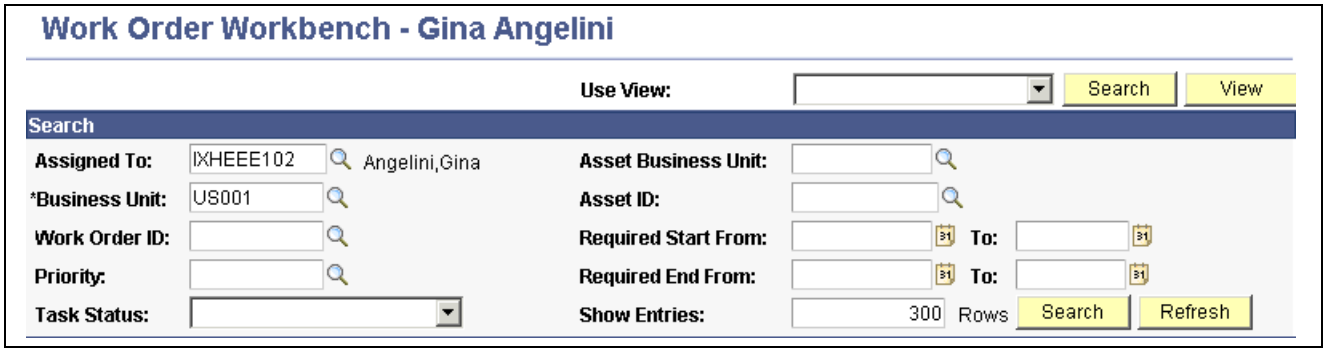
Pages Used to Manage Schedules Using the Work Order Workbench

Page Name	Object Name	Navigation	Usage
(Scheduler's Name) Workbench	WM_WOTSK_WORKBENCH	Maintenance Management, Work Order Management, Workbenches, Work Order Workbench	Search for a work order task assigned to a specific scheduler on the work order's Requirements page.
Task Search	WM_TSK_SRCH_SEC	Click the View button on the Work Order Workbench page.	Create a set of search criteria for work order tasks and save it as a view.
Work Order	WM_WO_HDR	Click the Work Order ID link on the Work Order Workbench.	Access the work order for a task to update, assign, and schedule the task.
Work Order Task Descriptions	WM_WO_TSK_DESC_SEC	Click the Task Description link in the Work Order Task - Task Overview tab in the Work Order Workbench.	Display a description of a task.
Asset Information	WM_WO_ASSET_SEC	Click the Asset Description link in Work Order Task – Task Overview tab in the Work Order Workbench.	Review task's asset information.
Work Order Task Notes	WM_TSK_NOTES	Click the View link in the Work Order Task - Task Overview tab in the Work Order Workbench.	Add or review task notes and note history.

Using the Work Order Workbench

Access the Work Order Workbench page.



Work Order Workbench - Search page

Use View Select a view that you saved using the View button and click Search to display the work order tasks. This eliminates having to specify search parameters every time you use the workbench.

View Click this button to access the Task Search page and enter search parameters to perform a search for one or more work order tasks. You can save the search parameters in the Task Search page to use again.

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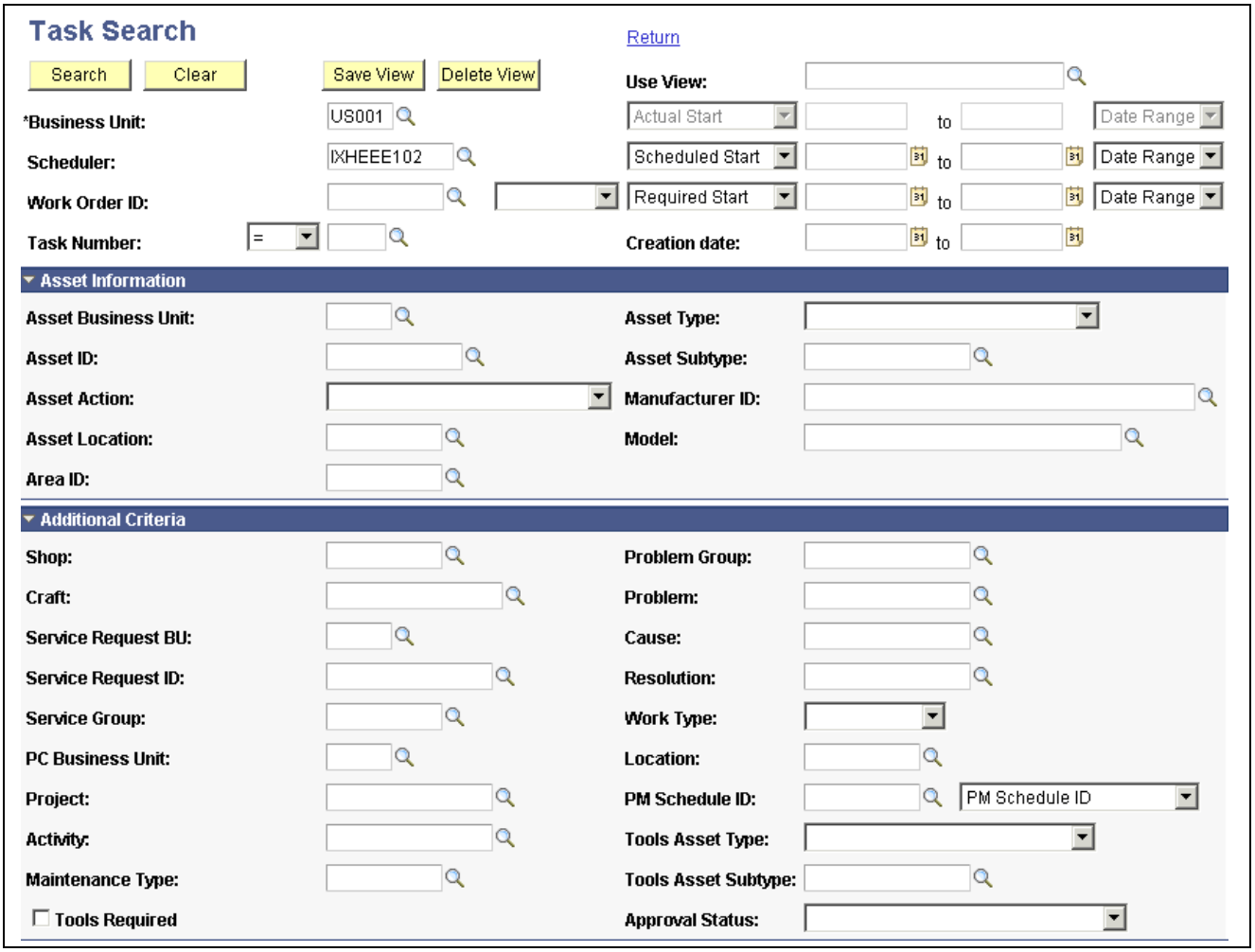
Basic Search for Work Order Tasks

You can also enter basic search criteria in the Search group box of the Work Order Workbench and click the Search button in the group box to list the tasks in the workbench based on the selected criteria.

Creating Work Order Task Search Views

Access the Task Search page.



Work Order Workbench - Task Search page (1)

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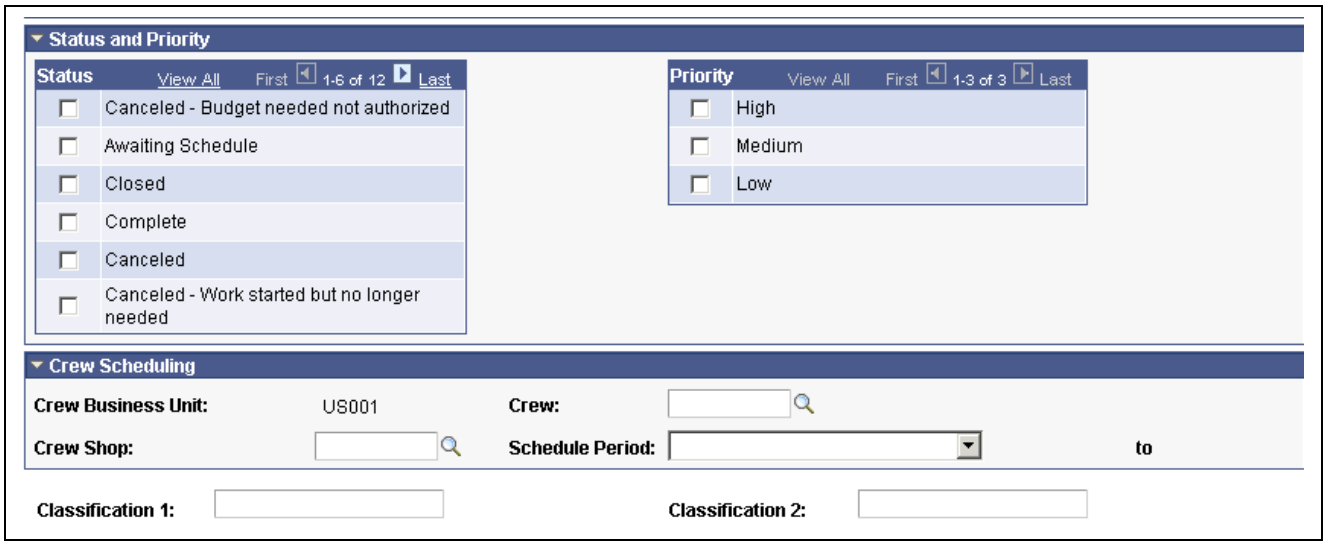

Work Order Workbench - Task Search page (2)

You select or enter the search criteria for a view. You can set up numerous views, which reduces the amount of time it takes to locate work orders and work order tasks having specific characteristics.

Use View Enter a name for the view that you want to save, after selecting the search criteria on the page. If you access this page by selecting a previously saved view on the Work Order Workbench Search page, then that view's name appears in this field.

Save View Click this button to save the search criteria entered on this page. You must first enter a name for the view in the Use View field.

Business Unit Override the default work order business unit, if necessary. Select or enter information in any of the remaining fields to narrow your search for work order tasks.

Crew Scheduling Select a specific Crew, Shop, and Schedule Period to narrow your search to only work order tasks whose requirements are assigned to the specified crew and schedule period.

Classification 1: The classification fields appear based on supplemental data that can be set up for a work order task.

Search Click this button to search for the work order tasks that meet the selected criteria on the Task Search page.

Using the Task Overview Tab in the Work Order Workbench

Access the Task Overview tab.

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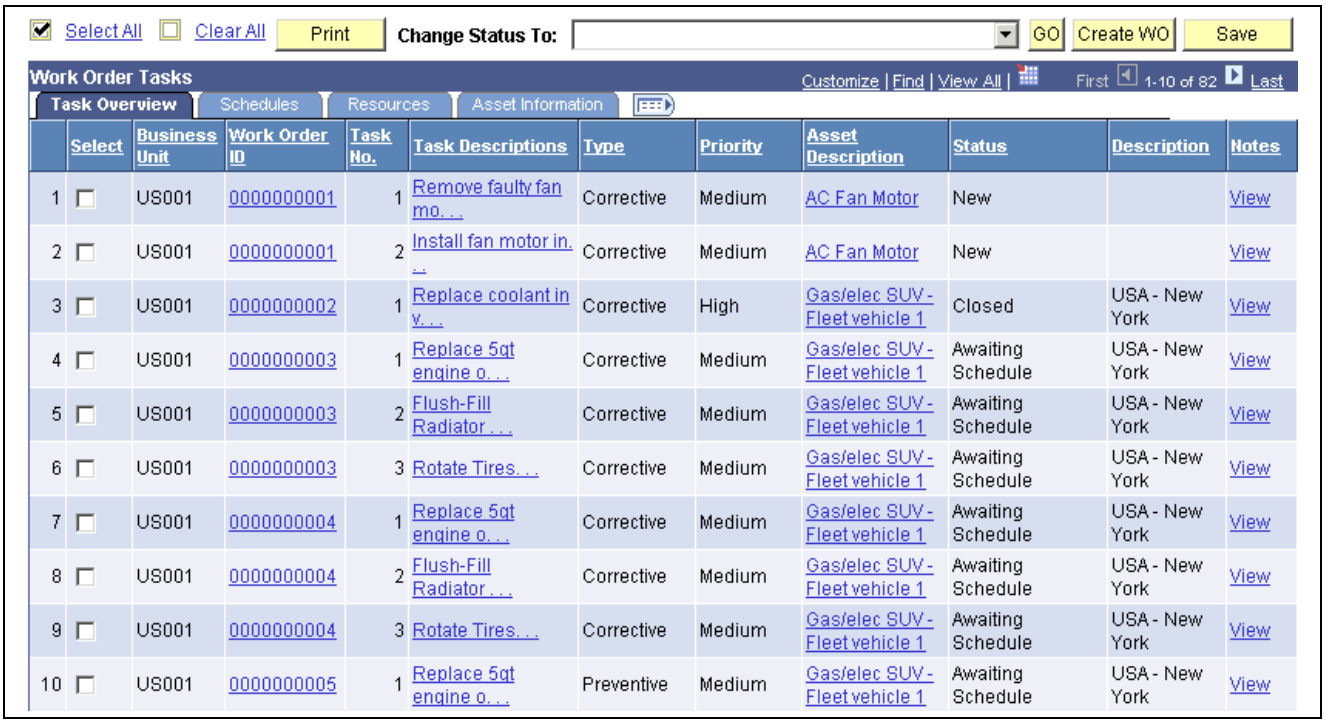

Select All | Clear All | Print | Change Status To: | GO | Create WO | Save

Work Order Tasks — Customize | Find | View All | First 1-10 of 82 Last

Task Overview | Schedules | Resources | Asset Information

	Select	Business Unit	Work Order ID	Task No.	Task Descriptions	Type	Priority	Asset Description	Status	Description	Notes
1	☐	US001	0000000001	1	Remove faulty fan mo...	Corrective	Medium	AC Fan Motor	New		View
2	☐	US001	0000000001	2	Install fan motor in...	Corrective	Medium	AC Fan Motor	New		View
3	☐	US001	0000000002	1	Replace coolant in v...	Corrective	High	Gas/elec SUV - Fleet vehicle 1	Closed	USA - New York	View
4	☐	US001	0000000003	1	Replace 5qt engine o...	Corrective	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View
5	☐	US001	0000000003	2	Flush-Fill Radiator...	Corrective	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View
6	☐	US001	0000000003	3	Rotate Tires...	Corrective	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View
7	☐	US001	0000000004	1	Replace 5qt engine o...	Corrective	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View
8	☐	US001	0000000004	2	Flush-Fill Radiator...	Corrective	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View
9	☐	US001	0000000004	3	Rotate Tires...	Corrective	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View
10	☐	US001	0000000005	1	Replace 5qt engine o...	Preventive	Medium	Gas/elec SUV - Fleet vehicle 1	Awaiting Schedule	USA - New York	View

Work Order Workbench page - Task Overview tab

Select All Click this check box to indicate that you want to select all of the listed work order tasks listed in the workbench to print.

Clear All Click this button to unselect all of the work order tasks listed in the workbench.

Print Click this button to access the Work Order Task Detail Report options. You select print reports for the selected tasks, which include:

- Labor Assignment Report
- Material Assignment Report
- Purchase/On-Hand Report
- Tool Assignment Report
- Instruction Report
- Checklist Report
- Work Order Notes Report
- Work Order Task Notes Report
- Equipment Parts List Report

Note. You can also click the Bar Code check box to include bar codes on the reports to enable bar code scanning.

Change Status To Select one or more tasks for which you want to transition the status, select the target status, and select the Go button.

Create Work Order Click this button to access the Work Order search page, where you can add a new work order.

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Save Click this button to save any changes to the Work Order Workbench.

Work Order ID Click this link to access the actual work order.

Task Descriptions Click this link to review a description of the task.

Asset Descriptions Click this link to access the Asset Information page and review basic information about the target asset being repaired or maintained in the task.

Notes Click the *View* link to review any existing notes for this work order task , to add a new note, and to select different notes by checking the blank check box next to the Subject field to send to a scheduler or service request requester.

Using the Schedules Tab in the Work Order Workbench

Access the Schedules tab.

Tasks

Customize | Find | View All | First 1-10 of 82 Last

view | Schedules | Resources | Asset Information

Business Unit	Work Order ID	Task No.	Dependency	Overlap Percentage	Priority	Status	Asset Description	Required Start Date	Required End Date	Hours	Scheduled Start Date	Start Time	Scheduled End Date	End Time
US001	0000000001	1			Medium	New	AC Fan Motor	06/09/2005	06/09/2005	1	06/09/200	8:00AM	06/09/200	5:00PM
US001	0000000001	2			Medium	New	AC Fan Motor	06/09/2005	06/09/2005	1	06/09/200	8:00AM	06/09/200	5:00PM
US001	0000000002	1			High	Closed	Gas/elec SUV - Fleet vehicle 1	06/10/2005	06/10/2005	1	06/10/2005	8:00AM	06/10/2005	5:00PM
US001	0000000003	1			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	10/05/2005	10/05/2005	1	10/05/200	8:00AM	10/05/200	5:00PM
US001	0000000003	2			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	10/05/2005	10/05/2005	1	10/05/200	8:00AM	10/05/200	5:00PM
US001	0000000003	3			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	10/05/2005	10/05/2005	1	10/05/200	8:00AM	10/05/200	5:00PM
US001	0000000004	1			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	10/10/2005	10/10/2005	1	10/10/200	8:00AM	10/10/200	5:00PM
US001	0000000004	2			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	10/10/2005	10/10/2005	1	10/10/200	8:00AM	10/10/200	5:00PM
US001	0000000004	3			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	10/10/2005	10/10/2005	1	10/10/200	8:00AM	10/10/200	5:00PM
US001	0000000005	1			Medium	Awaiting Schedule	Gas/elec SUV - Fleet vehicle 1	02/07/2008	02/07/2008	1	02/07/200	8:00AM	02/07/200	5:00PM

Work Order Workbench page - Schedules tab

Required Start Date and **Required End Date** Displays required dates specified in the work order.

Scheduled Start Date and **Start Time** Modify the scheduled start date and time as necessary for each task. Validations of these schedule dates and times occur when the page is saved. The validations that take place for these fields on the Schedules page of the work order are also enforced on the Work Order Workbench.

Scheduled End Data and **End Time** Modify the scheduled end date and time as necessary.

Using the Resources Tab in the Work Order Workbench

Access the Resources tab.

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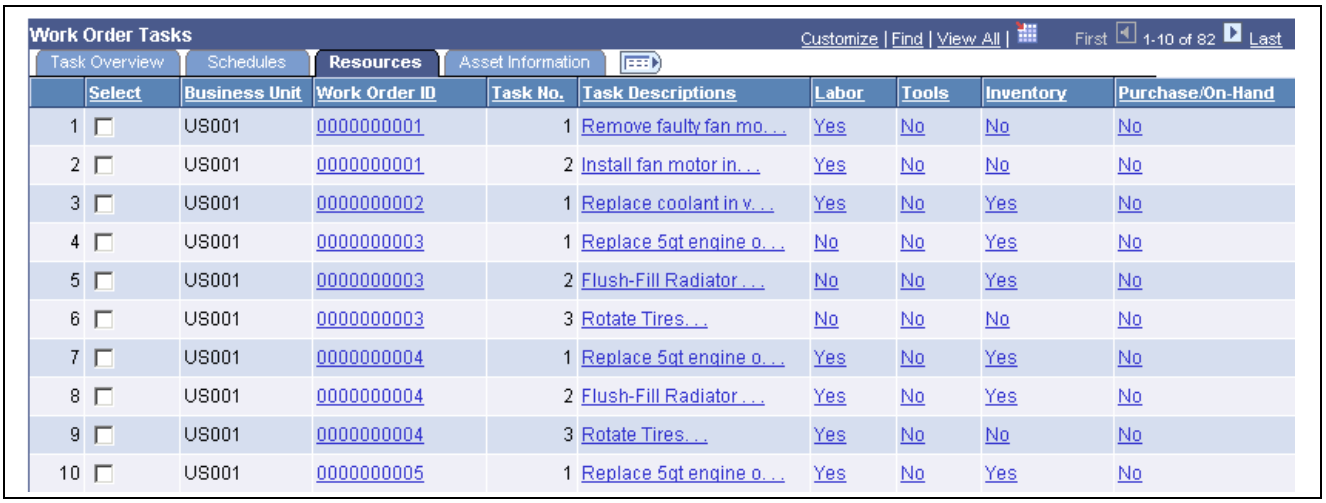

Work Order Tasks

Customize | Find | View All | First 1-10 of 82 Last

Task Overview | Schedules | Resources | Asset Information

	Select	Business Unit	Work Order ID	Task No.	Task Descriptions	Labor	Tools	Inventory	Purchase/On-Hand
1	☐	US001	0000000001	1	Remove faulty fan mo...	Yes	No	No	No
2	☐	US001	0000000001	2	Install fan motor in...	Yes	No	No	No
3	☐	US001	0000000002	1	Replace coolant in v...	Yes	No	Yes	No
4	☐	US001	0000000003	1	Replace 5qt engine o...	No	No	Yes	No
5	☐	US001	0000000003	2	Flush-Fill Radiator...	No	No	Yes	No
6	☐	US001	0000000003	3	Rotate Tires...	No	No	No	No
7	☐	US001	0000000004	1	Replace 5qt engine o...	Yes	No	Yes	No
8	☐	US001	0000000004	2	Flush-Fill Radiator...	Yes	No	Yes	No
9	☐	US001	0000000004	3	Rotate Tires...	Yes	No	No	No
10	☐	US001	0000000005	1	Replace 5qt engine o...	Yes	No	Yes	No

Work Order Workbench page - Resources tab

Labor Click the link to access the Labor Schedules grid on the work order's Schedules page, where you can modify the schedule depending on the status of the work order.

Displays *Yes* if labor resources are scheduled for this task and *No* if labor resources are not scheduled for this task.

Tools Click the link to access the Tool Schedules grid on the work order's Schedules page, where you can modify the schedule depending on the status of the work order.

Displays *Yes* if tool resources are scheduled for this task and *No* if tool resources are not scheduled for this task.

Inventory Click the link to access the Inventory Schedules grid on the work order's Schedules page, where you can modify the schedule depending on the status of the work order.

Displays *Yes* if inventory resources are scheduled for this task and *No* if inventory resources are not scheduled for this task.

Purchase/On-Hand Click the link to access the Purchase/On-Hand Schedules grid on the work order's Schedules page, where you can modify the schedule depending on the status of the work order.

Displays *Yes* if Purchase/On-Hand resources are scheduled for this task and *No* if Purchase/On-Hand resources are not scheduled for this task.

Using the Asset Information Tab in the Work Order Workbench

Access the Asset Information tab.

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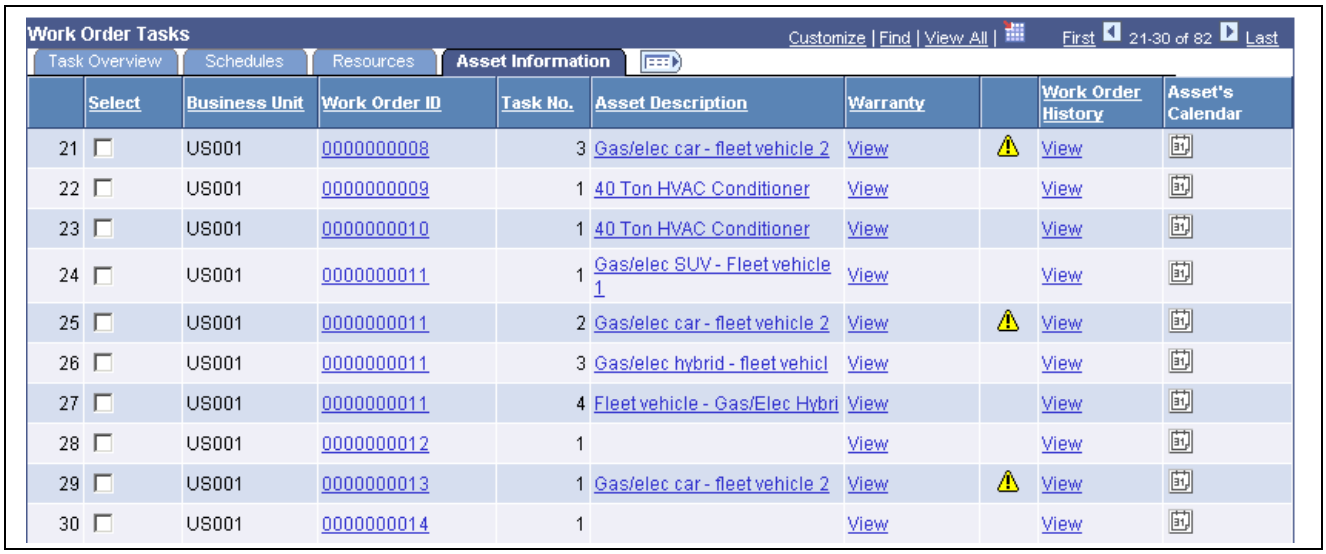

	Select	Business Unit	Work Order ID	Task No.	Asset Description	Warranty		Work Order History	Asset's Calendar
21	☐	US001	0000000008	3	Gas/elec car - fleet vehicle 2	View	⚠	View	
22	☐	US001	0000000009	1	40 Ton HVAC Conditioner	View		View	
23	☐	US001	0000000010	1	40 Ton HVAC Conditioner	View		View	
24	☐	US001	0000000011	1	Gas/elec SUV - Fleet vehicle 1	View		View	
25	☐	US001	0000000011	2	Gas/elec car - fleet vehicle 2	View	⚠	View	
26	☐	US001	0000000011	3	Gas/elec hybrid - fleet vehicl	View		View	
27	☐	US001	0000000011	4	Fleet vehicle - Gas/Elec Hybri	View		View	
28	☐	US001	0000000012	1		View		View	
29	☐	US001	0000000013	1	Gas/elec car - fleet vehicle 2	View	⚠	View	
30	☐	US001	0000000014	1		View		View	

Work Order Workbench - Asset Information tab

Warranty Click this link to view or add warranty information for the work order task's asset on the Asset Warranties page.

⚠ Click this icon to access active warranties associated with this asset. This icon will only display if there are warranties associated with the asset.

Displays this icon if the asset being maintained is categorized as hazardous.

Work Order History Click this link to access the Work Order Task History page for this asset. You can override the asset ID on the page and search for and display the task history for a different asset.

Asset's Calendar Click this link to access the Asset Monthly Schedule page, where you can review existing commitments for the asset.

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CHAPTER 19

Performing Crew Scheduling

This chapter presents an overview of crew scheduling in Oracle's PeopleSoft Enterprise Maintenance Management and discusses how to:

- Perform crew capacity planning.
- Schedule crews.
- Use the Labor Assignment Workbench.
- Use crew schedule metrics.
- Review the crew rescheduling history.

Understanding Crew Scheduling

Many maintenance organizations and organizations that perform large capital projects prefer to schedule crews for work orders in specific periods rather than schedule individual labor resources. They must be able to determine the crew's availability and capacity to appropriately allocate each crew's resources to specific work order tasks. After scheduling crews to work orders, organizations need to measure and analyze statistics concerning each crew's compliance with the schedule in order to plan realistically for future periods.

To perform the overall crew scheduling process, users:

- Set up for crew scheduling.
- Plan crew capacity.
- Schedule crews and distribute reports.
- Assign crew and individual technicians to work orders.
- Capture schedule compliance statistics.

This section discusses:

- Crew scheduling setup requirements.
- The crew scheduling process.

Crew Scheduling Setup Requirements

Before you can perform crew scheduling you must set up:

- User preferences - Maintenance Management options.

  You can select options on the Maintenance Management page, which enable specific users to perform activities related to crew scheduling.

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See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

- Employee and labor resources.

  Any resource, including all crew members, who are identified in a shop must be set up as a resource in PeopleSoft Maintenance Management. Users must follow all the setup requirements for employees, including setting up a resource schedule for each resource, which are specified in the Setting Up Labor and Tools Resources chapter.

  Important! Be sure to run the Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration process to ensure any new resources are available for scheduling.

  See Chapter 8, "Setting Up Labor and Tools Resources," Resource Cache Administration, page 170.

- Crafts.

  You must set up crafts before you set up crews. Crew members are set up based on their primary craft and are scheduled by craft.

  See Chapter 8, "Setting Up Labor and Tools Resources," Defining Crafts, page 181.

- Shifts.

  You must set up shifts and assign a shift to each resource who is assigned to a crew.

- Schedule patterns and periods.

  Crews are normally scheduled for specific time periods, which are created based on a pattern of time, such as daily, weekly, biweekly, and monthly. To plan crew capacity for a specific period, you must have identified a schedule pattern, such as weekly, and generated a series of schedule periods based on a period start date and assigned a schedule pattern and period to the crew.

  See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Shifts, Schedule Patterns and Periods, Shops, and Crews, page 194.

- Shops.

  Each crew belongs to only one shop. Each of the crew members are identified as resources in the shop. You must identify a shop when you set up a crew, which means that you must set up your shops before you set up your crews. When you assign a crew to a shop, the crew is updated in the shop.

- Crews.

  You set up a crew for a specific business unit and shop and associate it with a schedule pattern and identify the crew members and the percentage of time they can work on this crew.

- Crew rescheduling reason codes.

  When you reschedule a crew, you need to identify the reason for the rescheduling.

  See Chapter 8, "Setting Up Labor and Tools Resources," Understanding Shifts, Schedule Patterns and Periods, Shops, and Crews, page 194.

The Crew Scheduling Process

This section presents an overview of the crew scheduling process. The following sections in this chapter discuss these topics in more detail or they are discussed elsewhere in this PeopleBook.

The crew scheduling process includes the:

- Set up of crew data, which is discussed in the previous section.

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- Creation of work orders and work order task requirements.
- Creation of a crew capacity plan.
- Use of the Crew Scheduling Workbench to schedule crews to work order task labor requirement lines based on the crew capacity plan and update the schedule metrics.
- Use of the Labor Assignment Workbench to assign crew members and individual technicians to the work order task labor schedule lines.
- Review and analysis of the crew schedule metrics, reports, and the rescheduling history.
- Report time for each of the labor resources and for the crew.

Creation of Work Orders and Work Order Task Requirements

You can create work orders and work order requirements that use crews using two methods:

- Creating a work order using the Work Order component.

  When you create a work order, if crew scheduling is enabled for the shop associated with the work order, the primary crew of the shop displays as the default preferred crew on the work order task. Or, if you selected an asset that has a shop and crew associated with it, this crew defaults as the preferred crew.
- Setting up a PM schedule and using the Preventive Maintenance process to generating work orders that use crews.

Regardless of the method in which the work order is created, you must access the Work Order component to define the work order task requirements for the work orders to which you intend to schedule a crew. If you selected the Schedule Crew check box on the Shop Information page and associated a crew with the shop, the system assigns the shop's primary crew defined as the default preferred crew on the work order task. You can override this crew with another crew in the work order and override the shop for the task, if necessary. If the asset identified on the work order task has its own preferred crew specified in the asset definition, the system assigns this crew, and not the shop's primary crew, to the work order task by default. However, the crew associated with the asset must belong to the shop associated with the work order for this override to occur.

The Labor Requirements grid include a Crew Assignments tab and a Crew Timetable tab. You add the requirement rows based on each craft for each task in the work order. The craft, quantity, and hours that you enter as requirement rows display in the Crew Assignment and Crew Timetable tabs. The system does not update remaining fields on these grids you schedule the crews on the Crew Scheduling Workbench. When you access the Crew Scheduling Workbench and search for the labor requirement rows associated with the crew specified in the work order, these rows are listed in the Crew Scheduling Workbench for that crew.

Crew Capacity Plan

You create a crew capacity plan to determine the total capacity of a crew and the capacity of each craft associated with the crew along with the potential cost and revenue amounts that will be generated by the craft for a future schedule period.

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Initially, the crew capacity plan displays the total base capacity and adjusted capacity values for the entire crew and the base capacity and adjusted capacity for each craft defined for the crew. The system derives the base capacity from the shift associated with the crew members, and the adjusted capacity from the calendar of the crew members stored in the resource availability cache. The crew supervisor updates the adjusted capacity figures based on information that the crew members provide as to why they will not be available for as many hours as their shift suggests. This provides the scheduler with an accurate baseline capacity to use when scheduling the next period using the Crew Scheduling Workbench. The crew capacity plan serves as the foundation for the calculation of the values that display on the capacity grid on the Crew Scheduling Workbench. When you create a crew capacity plan for a period, this capacity information displays in the Crew Scheduling Workbench for that period with additional fields that are updated based on the creation of crew schedules.

A more detailed description and the set up of a crew capacity plan is described in the section, Performing Crew Capacity Planning.

Important! We recommend running the cache administration process once a day and every time you add new resources or change resources' shifts.

See Chapter 19, "Performing Crew Scheduling," Understanding Crew Capacity Planning, page 528.

Crew Scheduling Workbench

The Crew Scheduling Workbench enables a scheduler to avoid the burden of scheduling each individual technician by scheduling entire crews based on their availability by craft to work on work order tasks in specific periods. Scheduling crews in this manner also establishes the schedule metrics by crew and craft to use for future completion analysis. After completing the crew scheduling for a period, the craft supervisor can access the Labor Assignment Workbench to assign members of the crew, as well as non-crew members, to the scheduled work order tasks.

The Crew Schedule Workbench enables you to:

- Display a crew's capacity plan by craft.
- Schedule crews to multiple work orders for a period.
- Search for unscheduled work.
- Search for and schedule crew carryover work.
- Access preventive maintenance projections.
- Access labor, inventory, purchase/on-hand, and tool resources defined for work orders to determine the resources that are defined for each work order task.
- Unschedule and reschedule work.
- Enter reason codes and descriptions of rescheduled work.
- Freeze (confirm) the schedule and save any updates applicable to the crew schedule metrics.

A more detailed description and the implementation of the Crew Scheduling Workbench is described in the Crew Scheduling section of this chapter.

See Chapter 19, "Performing Crew Scheduling," The Crew Scheduling Process, page 524.

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Labor Assignment Workbench

Once you schedule a crew to work order tasks for a specific period on the Crew Scheduling Workbench and you created the labor schedules in the work order, you can use the Labor Assignment Workbench to assign each of the crew members to the scheduled tasks. When you search for work order tasks for a specific crew and period in the Labor Assignment Workbench, the system displays all of the labor schedule rows that were scheduled to the crew for the period in the Crew Scheduling Workbench. You can also display and assign non-crew scheduled labor schedule rows in the Labor Assignment Workbench and make labor assignments.

When you access the Labor Assignment Workbench, a resource availability grid displays the availability and load of each crew member for each day of the schedule period. If labor schedule rows exist for this crew, they display below the Availability grid. When you assign employees to the labor schedule rows or change the schedule dates or hours on the rows, the Availability grid is automatically updated. When you save the Labor Assignment Workbench page, the system updates the labor schedule rows in the work orders and updates the resource calendar with the new assignments.

The Labor Assignment Workbench is used to:

- Assign individual crew resources to the crew scheduled tasks.
- Assign individual non-crew resources to scheduled work order tasks.
- Review the available hours of individual resources.
- Reschedule work to a different resource, regardless of the resource's primary craft.
- Search, select, and display work order labor schedules by period.
- Unassign resources.
- Search for labor resources and display their capacity, load, and tasks assigned each day.

For a more detailed description of the use and setup of the Labor Assignment Workbench, refer to the Using the Labor Assignment Workbench section in this chapter.

See Chapter 19, "Performing Crew Scheduling," Understanding the Labor Assignment Workbench, page 571.

Crew Schedule Metrics and Reports

Crew schedule metrics are generated based on activities performed in the Crew Scheduling Workbench. Schedulers can use these values to determine how well the crews complied with the schedule for the scheduling period. These metrics assist the scheduler in determining a more accurate target load percentage, which is the target value used to reduce the expected availability of the crew to allow for unscheduled events for future periods.

Schedulers can update the adjusted completed schedule hours and the adjusted completed hours within the Crew Schedule Metrics component. They can also view graphic representations of the overall schedule completion data and the schedule completion by craft data.

In addition to the crew schedule metrics, you can also obtain the Schedule Completion report, which describes how well the crews comply with the schedule for the period. This report enables you to determine any:

- Unscheduled/emergency work that was completed within a period.
- Completed scheduled work.
- Scheduled work that was not completed and becomes carryover work.

There are other Crew Schedule reports available, which include the:

- Crew Capacity report.

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This report describes the crew's base capacity, adjusted capacity, target load percentage, and schedule compliance percentage by lead craft for a specified schedule period.

- Schedule and Assignment report.

  This report describes the workload by craft within each crew and, when you select the Include Detail option, it provides information concerning the employees assigned to each task.

- Crew Unscheduled Work report.

  This report lists all of the work order tasks that are currently not scheduled by crew.

- Crew Carryover Work report.

  This report describes the work order tasks that were crew scheduled in a prior period and are not yet completed. They must be rescheduled by carrying the hours over to the next period.

See Chapter 19, "Performing Crew Scheduling," Using Crew Schedule Metrics, page 584.

See Appendix C, "PeopleSoft Maintenance Management Reports," page 673.

Performing Crew Capacity Planning

This section presents an overview of crew capacity planning and discusses how to:

- Plan crew capacity.
- Create a crew capacity chart.

Understanding Crew Capacity Planning

PeopleSoft Maintenance Management enables craft supervisors to plan crew capacity for a future scheduling period. They select a crew associated with a business unit and shop, select a future period, and the system calculates total values for the base capacity and adjusted capacity for the crew. The craft supervisor modifies the adjusted capacity values for each craft based on their personal experience and knowledge, which updates the totals. When a scheduler schedules a crew to one or more work orders on the Crew Scheduling Workbench, the crew capacity plan for that crew is updated based on the new crew assignments.

To determine crew capacity, you must set up a schedule pattern and generate schedule periods based on this pattern. Once a crew capacity is tied to the pattern, the user can add new periods with the initial period start date. Typically, the craft supervisor updates each resource's schedule with meetings, appointments, vacation, and more. The system acknowledges these commitments when determining crew availability and capacity. The accuracy of the crew availability and capacity depends upon whether you maintain each resource's calendar and routinely update the resource availability cache record.

Effective dates are very important in determining crew capacity. Each resource is assigned to a shop as of an effective date. The crew definition is effective-dated, the shop is effective-dated, and the schedule pattern set up for the crew is based on a date range. If you create a resource on a date falling after the effective date of the crew, the system adds the resource to the shop, but will not add the resource to the crew. For example, if the effective date on the Define Crew page is 3/04/06 and you create an additional resource and associate it with the shop on 3/5/06. You cannot add this resource to the crew without changing either the effective date of the crew or the effective date of resource's association with the shop.

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You create a crew capacity plan for a crew based on a specific schedule period, which is generated from the crew's schedule pattern. The schedule pattern defined in the Crew Definition component is effective-dated, which means that the schedule pattern of a crew might change over time. Therefore, when adding a new crew capacity plan, the system must ensure that only valid schedule periods are used to create the new crew capacity plans. Valid schedule periods are the current and future periods that are valid for the crew schedule pattern as of the start date of the period. When you create a new crew capacity plan, the system calculates specific elements in the plan, which include:

- Base capacity.

  Base capacity is the crew's total available hours calculated based on the crew resources' weekly shift hours and their capacity allocation percentages in that crew. A crew's total base capacity in hours is the sum of the base capacity calculation for each craft, which displays in the Crew Craft Capacity - Details tab on the Crew Capacity page.

  Base Capacity (Hours) = Total hours in a crew member's assigned shift * Crew member's capacity %.

  A capacity percentage is assigned to each crew member on the Define Crew page. It represents the percentage of time allocated for each crew member to work on a specific crew.

Note. The *base* capacity does not take holidays into account. For example: For the week of the 4th of July holiday (07/02/06 – 07/08/06), the base capacity of the resource will be 40 hours assuming he is assigned to an 8 hour day, M-F shift. It *will not* consider the 7/4 as a holiday.

The following table describes John Clark's time allocation to different crews:

Shop	Crew	Capacity %
Shop A	Crew 1	25%
Shop B	Crew 2	25%
Shop A	Crew 3	50%

Crew members must be listed as resources in the shop associated with their crew. Each resource assigned to a shop is associated with a shift:

Crew Member /Craft	Shift	% Capacity for Crew 1	Biweekly Base Capacity (Hours)	Total Base Capacity/Craft
#1 Electrician	L1 = 8 hour/day, 5 days per week, 40 hours/week.	100%	80.00 hours	80.00 hours
#2 Electrician	L1 = 8 hour/day, 5 days per week, 40.00 hours/week.	50%	40.00 hours	120.00 hours
#3 Mechanic	L1 = 8 hour/day, 5 days per week, 40 hours/week.	100%	80.00 hours	80.00 hours
Crew 1 Total Base Capacity (Hours)				200.00 hours

- Adjusted capacity (hours, days, headcount)

  Adjusted capacity = Base capacity – All commitments (meetings, etc.) on the resource's calendar.

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The system initially calculates the adjusted capacity for each craft in hours, days, and head count. .

The total adjusted capacity amounts that display for the crew = the sum of the craft values.

Schedulers can adjust the values in adjusted capacity fields for each craft based on their knowledge of any external circumstances affecting each crew member. The system recalculates total adjustment values for the crew based on any changes to these values that the scheduler enters.

The accuracy of these calculations are also dependent on the timely management of a resources schedule, as well as the timeliness of the PeopleSoft Resource Management Availability Cache Record.

Note. The adjusted capacity *takes holidays into account* as long as the cache record is updated correctly based on the set up for scheduled holidays. For example, for the week of the 4th of July holiday (07/02/06 – 07/08/06), the adjusted capacity of the resource will be 32 hours assuming he is assigned to an 8 hour day, M-F shift. It *will* consider the 7/4 as a holiday, as long as the cache is updated.

- Adjusted capacity (hours)

  Adjusted capacity (hours) (which initially displays in the Crew Craft Capacity - Details tab) = Base capacity – Any assigned hours for meetings, appointments, and more in a resource's schedule during the designated period.

  For example:

  The resource schedule for crew member #1 in the previous example indicated one day (8 hours) for vacation and there were no additional assignments on the resource schedule for crew member #2 .

  The adjusted capacity in hours for the craft Electrician equals 120.00 hours – 8.00 hours = 112.00 hours.

  Crew member #3 has a 4 hours appointment scheduled.

  The adjusted capacity in hours for the craft Mechanic equals 80.00 hours – 4.00 hours = 76.00 hours.

  The total adjusted capacity in hours for the entire crew equals the adjusted capacity hours for Electricians (112.00 hours) + the adjusted capacity hours for Mechanics (76.00 hours) = 188.00 hours.

- Adjusted capacity (days)

  The adjusted capacity in days for each craft = the adjusted capacity in hours / the standard hours per workday defined in the shop.

  For example:

  The adjusted capacity in days for an Electrician = 112.00 (the adjusted capacity in hours) / 8.00 hours (the standard hours per workday defined in shop) = 14.00 days for Electricians.

  Mechanics = 76.00 hours / 8.00 hours = 9.50 days.

  The total adjusted capacity in days for the crew is: Electrician (14.00 days) + Mechanic (9.50 days) = 23.50 days.

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- Adjusted capacity (head count)

  The adjusted capacity based on head count = The craft's adjusted capacity days / The number of work days in the schedule period.

  For example:

  For an Electrician, 14.00 days (adjusted capacity days for an Electrician) / 14.00 days (the number of work days in the schedule period) = 1.00 Adjusted capacity headcount for an Electrician.

  For a Mechanic = 9.50 days / 14.00 days = .68 Adjusted headcount for a Mechanic.

  The total adjusted capacity based on head count for the crew = Craft 1 (Electrician) head count (1.00) + Craft 2 (Mechanic) head count (.68) = 1.68 head count total adjusted capacity for the crew.

- Total cost

  Total cost for each craft = Adjusted capacity in hours * Hourly cost rate.

  The default hourly cost rate on the Crew Craft Capacity - Potential Cost Revenue tab is derived first from an hourly cost rate set up for the craft entered on the Craft Rates page of the Shop, or the value is derived from the generic labor cost rate specified in the shop or work order business unit. . .

  For example:

  The total cost for Electricians = 112.00 (The adjusted capacity in hours) * 150.00 USD Hourly cost rate) = 16,800.00 USD

  Because the rate for Mechanics is not specified on the Craft Rates page of the shop: 76.00 hrs. (Adjusted capacity in hours) * 100.00 USD (The default labor cost rate from the business unit) = 7,600.00 USD total cost for Mechanics.

  Total cost is the sum of each craft's total cost or 16,800.00 USD + 7,600.00 USD = 24,400.00 USD

- Total potential revenue

  Total potential revenue for each craft = Adjusted capacity in hours * Hourly bill rate)

  The default hourly bill rate on the Crew Craft Capacity - Potential Cost Revenue tab is derived first from an hourly bill rate set up for the craft entered on the Craft Rates page of the Shop, or the value is derived from the generic labor bill rate specified in the shop or work order business unit. Total potential revenue for each craft is equal to the adjusted capacity in hours (112.00, Electricians) * Hourly bill rate (200.00 USD) = 22,400.00 USD. * Default labor bill rate from the business unit (110.00 USD) = 8,360.00 USD.

  For Electricians, the total potential revenue = 112.00 hrs. (The adjusted capacity in hours) * 200.00 USD (The hourly bill rate) = 22,400.00 USD total potential revenue for Electricians.

  Because the rate for Mechanics is not specified on the Craft Rates page of the shop, the default bill rate from the business unit is used: 76.00 hrs. (The adjusted capacity in hours) * 110.00 USD (The default bill rate) = 8,360.00 USD total potential revenue for Mechanics.

  The total potential revenue is the sum of each craft's total potential revenue: 22,400.00 USD (Electricians) + 8,360.00 USD (Mechanics) = 30,760.00 USD

- Total workdays

  Total workdays equal the total number of days the shop is open based on the schedule period. For example, if the schedule period is weekly and the standard operating hours of the shop as defined on the Shop Definition page indicate that the shop is open on Monday for 8 hours, Tuesday for 8 hours, and Wednesday for 4 hours, then the Total Workdays equals 3 days for the weekly schedule period. Even though the shop is only open for 4 hours on Wednesday, it is counted as one workday.

- Average target load percentage

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This figure is the weighted average of the target load percentage of each craft associated with the crew. The target load percentage for a craft is determined by the scheduler based on the scheduler's knowledge of any unscheduled or emergency works that might come in during the scheduling period. After the initial creation of a crew capacity plan, the scheduler can enter a target load percentage for each craft, which is used to calculate the target hours for each craft.

For a craft: Target load % * Adjusted capacity in hours = Craft's target hours.

For example:

A scheduler enters a target load percentage of 10.00, the target hours will equal to 11.20 hours, then 10.00% * 112.00 hrs (Adjusted capacity in hours for Electricians) = 11.20 target hours for Electricians.

The following table demonstrates how the average target load percentage is calculated:

Craft	Qty Resources	Target Load %	Qty * Target Load %	Average Target Load % = SUM of (Qty * Target Load %) / Total Qty Resources
Electrician	2	95.00	2 * .95 = 1.90	
Plumber	1	100.00	1 * 1.00 = 1.00	
Carpenter	5	80.00	5 * .80 = 4.00	
				SUM:(1.90 + 1.00 + 4.00)/ 8 = 86.3% Average Target Load %

You can add crafts that are not part of a crew to a crew capacity plan, and you do not have to add these crafts to the crew. You also can copy from an existing crew capacity plan.

The confirmed scheduled hours and the total scheduled hours for a crew capacity plan are automatically updated when you assign and confirm the work order task requirements against the capacity plan in the Crew Scheduling Workbench by using the Confirm Metrics action.

Note. You can add or remove crew members regardless of whether or not a crew capacity plan exists. To add a crew member, you insert a new effective-dated row on the Define Crew page.

Copying a Crew Capacity Plan

The system does not allow overlapping crew capacity plans, where the start period date for a new crew capacity plan falls within the period range of an existing crew capacity plan. However, users can copy a crew capacity plan from the current period to the future period. Because the crew is effective-dated and can change from one period to another, the system asks if you want to override the current capacity plan. If you indicate that you do want to override the crew capacity plan, the process will replace the capacity plan for each matched craft, but will not change the target quantity and base capacity amounts. If there is not a match for a given craft on the source capacity plan and the craft is not a crew craft, the system will insert the non-matching, non-crew craft to the target capacity plan.

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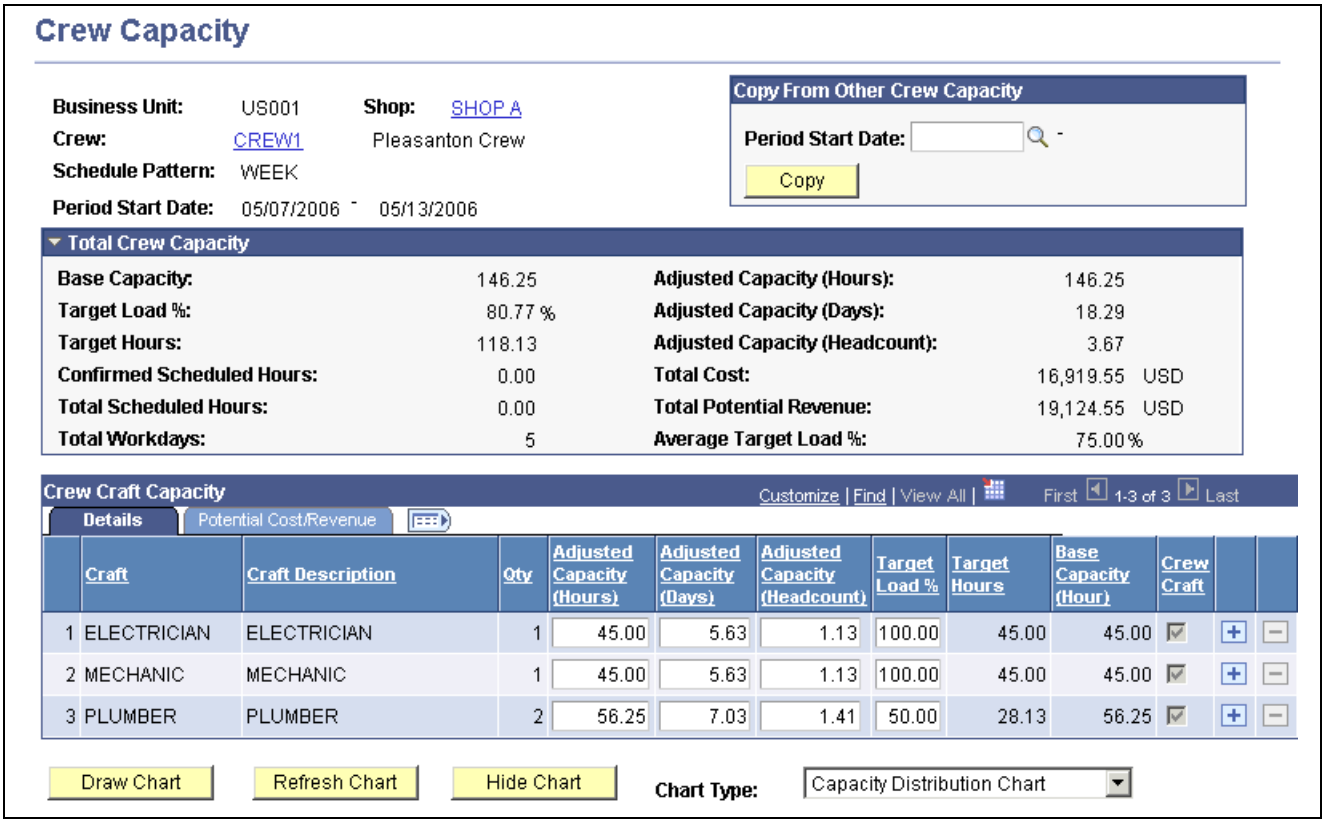
Page Used to Perform Crew Capacity Planning

Page Name	Object Name	Navigation	Usage
Crew Capacity	WM_CREW_CAPACITY	Maintenance Management, Crew Schedule, Crew Capacity Plan	Define and update a crew capacity plan.

Planning Crew Capacity

Access the Crew Capacity page.



Crew Capacity page

To create a crew capacity plan, you select a work order business unit, shop, crew, and a period start date on the Add a New Value page.

Shop Click the shop name link to access the Define Shop component for this shop.

Crew Click the crew name link to access the Define Crew component for this crew.

Total Crew Capacity

Base Capacity Displays the total resource base capacity for the crew, which is derived from the hours in each resource's shift times the total capacity percentage of each resource assigned to this crew on the Define Crew page.

Note. If the crew resources are associated with different shifts, the system calculates this value based on those difference shifts.

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Adjusted Capacity (Hours) Displays the total adjusted capacity in hours for the entire crew.

Total Adjusted Capacity = (Base capacity – All commitments) * Capacity allocation percentage of the each resource in the crew.

This cannot be a negative value. If a negative value is calculated, the system enters zero as the value.

Schedulers can modify this value manually for each craft based on their knowledge of the technician's working hours for that period in the Details tab, which adjusts this figure.

Note. The accuracy of this calculation is determined by the calendar entries of the resources for the specified schedule period and how current the resource management availability cache record is.

Target Load %(target load percentage [total crew]) Displays total target load percentage value for the crew (calculated at the crew level) = Total target hours / Total adjusted capacity(hours

Total load % = .Total target hours / Total adjusted capacity hours.

Adjusted Capacity (Days) Displays the total adjusted capacity in days for the crew.

Total adjusted capacity days = Total adjusted capacity hours / standard hours per workday defined on the Shop Definition page.

Target Hours Displays the total target available hours for the crew for the schedule period.

Total target hours for the crew = Total target load percentage * Total adjusted capacity hours.

Note. This value is used to schedule a crew.

Adjusted Capacity (Headcount) Displays the total adjusted capacity in headcounts for the crew.

Total adjusted capacity headcount for the crew = Total adjusted capacity days / Total workdays in the schedule period.

Note. The total workdays for a schedule period is based on the operating hours of the crew shop.

Confirmed Scheduled Hours Displays the total confirmed number of hours scheduled for the crew on the Crew Scheduling Workbench, which means that the Confirm Metrics action was performed against the crew schedules.

Total Cost Displays the total cost for the crew.

Total cost for the crew = Sum of the hourly cost rate for each craft * Total adjusted capacity hours for each craft.

Total Scheduled Hours Displays the total number of scheduled hours of all of the crafts listed for the crew. This value is updated when you assign a work order task requirement to a crew for the schedule period on the Crew Scheduling Workbench, or when you change the period on the Crew Scheduling Workbench and save the page.

Total Potential Revenue Displays a value, which is derived by multiplying the hourly bill rate for each craft times the adjusted capacity (hours) for each craft. This value equals the

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potential revenue for each craft. Add these figures together to obtain the total potential revenue for the crew.

Total Workdays Displays total number of workdays, which is derived from the total number of workdays in the shift associated with the shop based on the schedule period.

For example:

If the schedule period is biweekly, and the shift associated with the shop is 8 hours per day, 5 days per week, then the total workdays for this crew equals 10 days.

Average Target Load % (average target load percentage) Displays a weighted average of the target load percentage.

Average Target Load % = SUM (Number of resources in each craft) * Target Load % of the craft) / Total number of resources in the crew capacity plan.

Copy From Other Crew Capacity

Access the Copy From Other Crew Capacity group box.

The Copy button does not display once the work is scheduled for this crew capacity plan. To copy this source crew capacity plan to a target crew capacity plan, select:

Period Start Date Select or enter the start date for the future period for the target crew capacity plan.

Copy Click the Copy button to display a page containing the following information:

Would you like the system to override the current capacity plan?

The system will copy each craft to the target capacity plan that matches a craft on the source capacity plan. However, it does not copy the quantity and the base capacity fields of the source capacity plan.

If the system does not find a match for a source capacity plan craft in the target capacity plan, and the craft is not associated with a crew , the system will insert the craft into the target capacity plan. If the non-matching craft is a crew craft, it will *not* be added to the target capacity plan.

If the quantity of the target capacity plan is equal to the quantity of the source capacity plan for the crew's craft, the adjusted capacity value on the target capacity plan will be set to the adjusted capacity value on the source capacity plan. If these values are not equal, then the system will not change the adjusted capacity value in the target capacity plan.

Click the:

- Yes button if you want to override the current capacity plan.
- No button if you do not want to override the source capacity plan and copy it to a target capacity plan.

Crew Craft Capacity Details

Access the Crew Craft Capacity - Details tab.

Craft Displays one or more crafts based on the list of crafts associated with each resource on the Define Crew page.

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Qty (quantity)
Displays the number of resources on the Define Crew page associated with a craft.

Adjusted Capacity (Hours)
Displays the adjusted capacity hours for the total number of resources in a craft.

Adjusted Capacity hours (craft) = Base capacity for total number of craft resources – All commitments * Capacity allocation percentage of the craft resources.

Schedulers can modify this value manually based on their knowledge of the technician's working hours for that period. This adjustment is reflected in the total Adjusted Capacity (Hours) field in the Total Crew Capacity group box.

Note. The accuracy of this calculation is determined by the calendar entries of the resources for the specified schedule period and if the Resource Management Availability Cache Record is current.

Adjusted Capacity (Days)
Displays the adjusted capacity in days for a craft.

Adjusted Capacity (Days) for a craft = Adjusted capacity hours / Standard Hours per Day (Shop Definition)

A scheduler can adjust this value. This figure changes when the scheduler adjusts the adjusted capacity (hours) value.

Note. Adjustments to one value automatically adjusts the values in the other fields.

Adjusted Capacity (Headcount)
Displays the adjusted capacity headcount for a craft.

Adjusted capacity headcount for each craft = The adjusted capacity (days) /The total number of workdays based on the schedule period and the shop's operating hours.

A scheduler can adjust this value. This value changes if the adjusted capacity (hours) or (days) value changes.

Target Load % (target load percentage)
Enter the workload percentage for this crew taking into account any unscheduled or emergency work that might come up during this schedule period. This percentage is used to calculate the target hours for this craft.

Target Hours
Displays the target hours for each craft.

Target hours for each craft = Target load percentage for the craft * Adjusted capacity hours for the craft.

Base Capacity (Hours)
Displays the base capacity hours for each craft.

Base capacity hours for each craft = SUM of the resource's weekly shift hours * Capacity percentage specified for the resource on the Define Crew page.

Crew Craft
Displays a check mark in the check box as display only, if the listed craft is associated with this crew.

Note. The system selects and unselects this check box depending on whether you associate a craft with a crew.

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Crew Craft Capacity Potential Cost Revenue

Access the Crew Craft Capacity - Potential Cost Revenue tab.

Hourly Cost Rate Displays the hourly cost rate for a craft if it is specified on the shop's Craft Rates page. If the crew capacity plan has more than one craft and one or more of the crafts do not have a cost and bill rate specified on the Craft Rates page of the shop, then the rate is derived either from the shop or the work order business unit depending on the setup.

Hourly Bill Rate Displays the hourly bill rate for a craft if it is specified on the shop's Craft Rates page. If the crew capacity plan has more than one craft and one or more of the crafts do not have a cost and bill rate specified on the Craft Rates page of the shop, then the rate is derived either from the shop or the work order business unit depending on the setup.

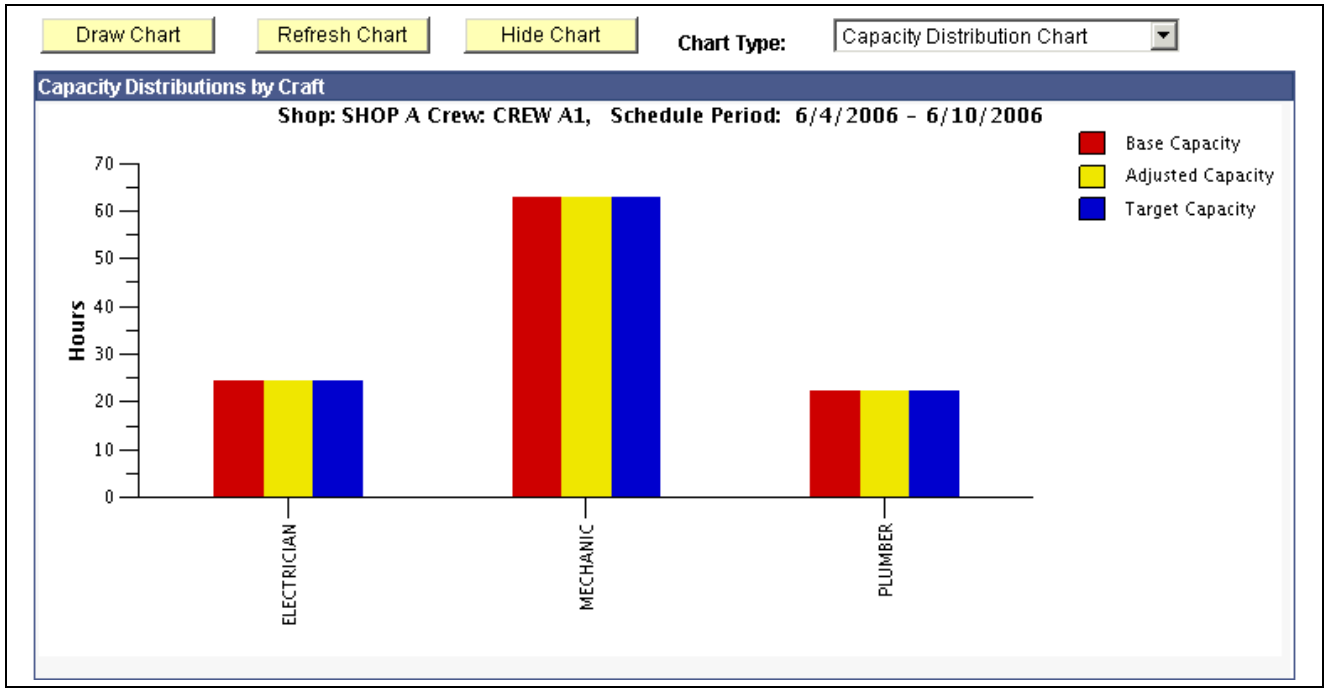
Total Cost Displays a value, which equals the adjusted capacity (hours) for the craft times the hourly cost rate.

Total Potential Revenue Displays a value, which equals the adjusted capacity (hours) for the craft times the hourly bill rate.

Currency Code Displays the default value derived from the work order business unit.

Creating a Crew Capacity Chart

Access the Crew Capacity page.



Capacity Distribution Chart - Crew Capacity page

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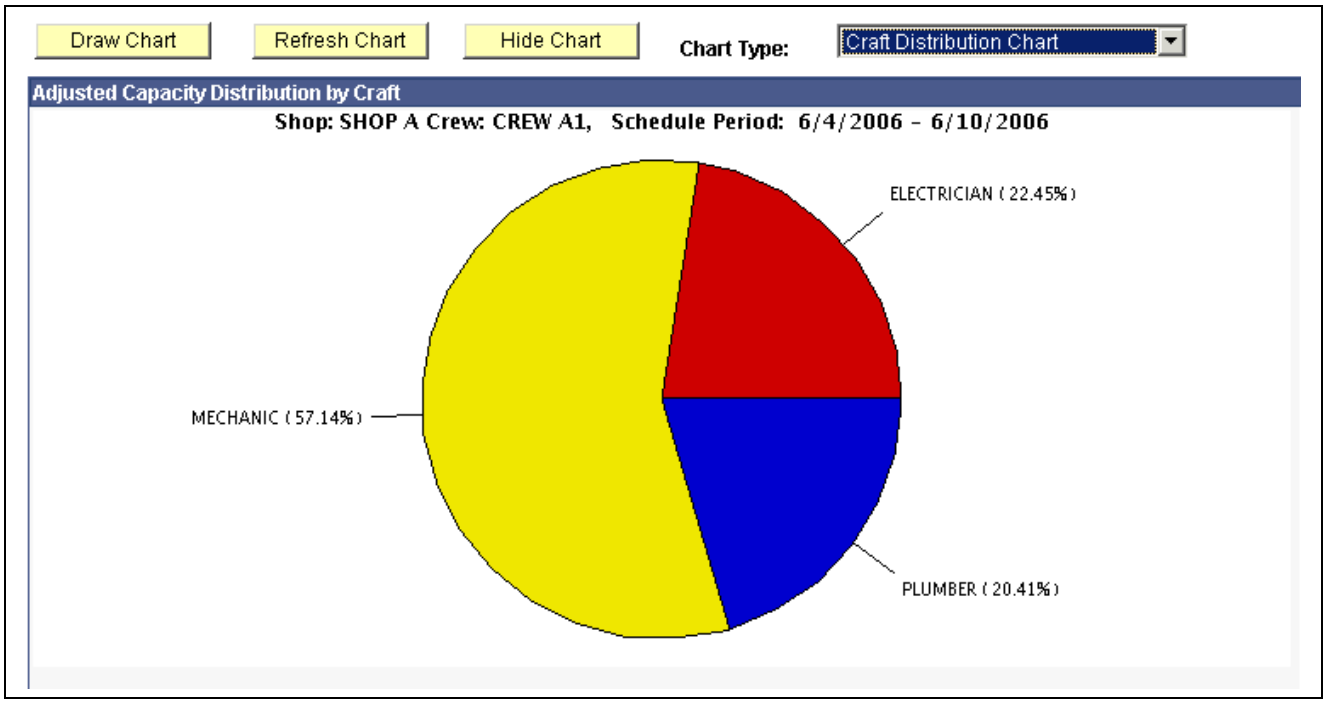

Craft Distribution Chart - Crew Capacity page

Draw Chart Click this button to display the crew capacity chart based on the crew capacity data for the schedule period. The system saves the page prior to drawing the chart.

Refresh Chart Click this button to refresh the crew capacity chart based on changes that you made to the crew capacity data.

Hide Chart Click this button so that the chart is not visible on the page.

Chart Type Select the type of chart that you want to display from one of these chart types:

- *Capacity Distribution Chart*

  This is a bar chart that compares the base capacity, adjusted capacity, and target capacity hours for each craft in the crew for the specified schedule period.

- *Craft Distribution Chart*

  This is a pie chart, which displays the adjusted capacity distribution percentages for each craft in the crew capacity plan.

Scheduling Crews

This section presents overviews of crew scheduling and status rules for the Crew Scheduling Workbench and discusses how to:

- Use the crew schedule search page.
- Scheduling crews to multiple work orders.

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- Define the Crew Scheduling Workbench Crew Assignments tab.
- Define the Crew Scheduling Workbench Resources tab.
- Define the Crew Scheduling Workbench Schedules tab.
- Define the Crew Scheduling Workbench Rescheduling tab.
- Define the Crew Scheduling Workbench Asset Information tab.
- Define the Crew Scheduling Workbench Messages tab.

Understanding Crew Scheduling

The Crew Scheduling Workbench enables you to determine a crew's capacity and allocate work orders by craft for a specific period so that each crew is loaded to its target capacity to ensure maximum efficiency. The workbench enables you to schedule crews to multiple work orders at one time.

You can establish and save multiple search criteria settings for each crew, that will enable you to easily search for unscheduled backlog work , carryover work, and scheduled work. To ensure that all tasks are scheduled, you can even display tasks that are not assigned to a crew. Your search criteria can include specific work order details, work order status and priority, and target asset information.

Prior to using the Crew Scheduling Workbench, you set up a crew capacity plan for each crew. This information displays in a crew capacity grid at the top of the Crew Scheduling Workbench. As you assign the crew by craft to one or more task lines, the crew capacity is immediately updated to reflect the assignments. This enables you to see the progress against the target load percentage. You can also change the crew at any time to compare one crew's capacity with the crew that you are scheduling.

The Crew Scheduling Workbench displays a list of work order task requirement lines based on your search criteria in the Workbench section of the page. Between the Crew Capacity and the Workbench sections is the Action list. You can select multiple task requirement rows and perform an action such as assigning a crew, changing the crew schedule dates and times, changing the period, creating labor schedules in the work order based on the assignments, updating carryover hours, and more. You can examine the work order tasks that were started and were not complete and those that look like they are not going to get started in the current period and move them to a future period. For any work that clearly cannot be done, you can put it in the backlog. Work can be unscheduled and rescheduled. You can also schedule unplanned or emergency work that comes up during the current period or push it out to the next, following, or a subsequent period if necessary. Once the work is scheduled, if necessary you access the Labor Assignment Workbench directly from the Crew Scheduling Workbench to assign the work to individual members of the crew.

Once you have gone through the various tasks and loaded up each craft to the desired level, you can save the schedule as a baseline for the period and review information such as the actual quantity of the work performed compared to the quantity of work scheduled, or the scheduled work performed as a percentage of the total work.

The Crew Scheduling Workbench consists of:

- The Crew Scheduling Workbench Search page.
- The crew capacity grid.
- Crew Scheduling Workbench work order task labor requirements.
- Crew Scheduling Workbench actions.

However, if the crew period and availability do not coincide with the task start and end dates, you can override these dates when you schedule the crew. Overriding these dates changes the scheduled start and end dates on the work order task. .

There are certain rules that apply to crew scheduling:

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- Since crew scheduling depends on periods, the crew schedule to dates are limited to a given period. You will receive an error if you attempt to schedule across multiple periods. You must split the labor requirements if you want to schedule across periods.
- To perform crew scheduling, the approval status of the work order must be *Approved*. After the work order is approved, users cannot split work order task rows to segregate portions of the work onto different crews. If this is something that you need to do, you can create child work orders that also must be approved.

The Crew Scheduling Workbench Search Page

Once your work order requirements are defined, you access the Crew Scheduling Workbench to display the work orders, tasks, and task lines that you want to assign to a crew. For greater efficiency, you can set up views for different stages of the crew scheduling process and save those views. This enables you to access the schedules easily, without having to reenter the search criteria every time. Your search criteria must include a crew business unit, a crew shop, a crew, and a schedule period. You can also select the View Tasks without Crew check box to include unscheduled work orders that are not associated with a crew.

For example, you could set up and save the view named C1_S1_Current_Unsch. This view name indicates that your selected search criteria is for:

- Crew 1.
- Shop 1.
- Current period.
- Unscheduled.

The scheduling statuses are:

- *Unscheduled.*

  This refers to all of the work order labor requirements that have not yet been assigned to a crew.

- *Scheduled.*

  Selecting this option displays all of the work order labor requirements that have been assigned to a crew and are currently not completed within the specified period. The crew schedule status of the work order task rows on the workbench display as *Scheduled, Unplanned/Emergency,* or *Scheduled Confirmed*.

- *Carryover Work.*

  Selecting this option displays all of the work order labor requirements with a crew schedule status of *Scheduled, Unplanned/Emergency,* or *Schedule Confirmed* in periods that are current or previous to the specified period. The internal statuses of the work order tasks may transition from *Open* to *Work in Progress*, and the carryover hours of the tasks must be greater than zero.

- *Review Entire Crew Schedule.*

  Select this option, which works in conjunction with selected business unit, shop, crew and period values to list work orders scheduled to the specified crew and period. When you select this option, all search criteria fields other than the ones specified in the previous sentence are disabled and apply their default values to the search.

When you specify a schedule period, it is the date range covering the current schedule period. Typically this is defined as a week (Monday - Sunday), but could be 4 days or 2 weeks depending on the organizations requirements. The schedule period for each crew is determined by the schedule pattern assigned to each crew on the Define Crew page. The schedule period options are:

- *Current Period.*

  The current schedule period is the period defined for the crew based on the current date in the system.

- *Next Period*.

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This option refers to the period after the current period.

- *Following Period.*

  This options refers to the period following the next period.

- *Previous Period.*

  This option refers to the period prior to the current period.

- *Specific Period.*

  This option enables you to select a specific period from a list of one or more periods.

You can specify other search criteria based on the work order, the work order status and priority, and asset information on the search page and include it in your saved view. You can also indicate whether you want certain fields sorted in ascending or descending order on the page. After you name and save the view, you click the Search button to display the available capacity for the selected crew in the Capacity Crew grid and a list of work orders requirements on the Workbench grid.

Crew Capacity Grid

When you search for a crew in the Crew Scheduling Workbench Search page, the system displays the Crew Capacity grid for the crew along with any work order task rows based on the entered search criteria. This grid displays information regarding the crew's workload for the period specified on the search criteria, which is grouped by the primary crafts associated with the crew's members. The crew capacity data is updated as you begin to use the workbench's different actions, which enables you to track the percentage of capacity loaded for each craft against the craft's target load percentage.

Users can change the crew that they want to focus on at any time. Changing the crew is useful when you are trying to determine whether a given set of requirements should be assigned to crews other than the one specified on the search criteria. You select a different business unit, shop, crew, and craft, which is optional, and display that crew's data in the grid.

If you searched on one craft, only the selected craft displays in the grid for the crew. The crew capacity grid displays the following information for each craft associated with the crew:

- Adjusted Capacity (Hours).(a)

  You set up the adjusted capacity in hours in the Crew Capacity Plan for the crew and period. It typically represents the crew's: Total shift hours for the period – Any time off (vacation, holidays, sick days and more)

- Adjusted Capacity (Days).

  You set up the adjusted capacity in days in the Crew Capacity Plan for the crew and period. It typically represents the crew's:

  (Total shift hours for the period – Any time off) / Standard day hours defined in the crew's shop.

- Adjusted Capacity (Headcount).

  You set up the adjusted capacity headcount in the Crew Capacity Plan for the crew and period. It typically represents:

  The adjusted capacity days / The number of days in the schedule period.

- Target Load Hours. (b)

  This field is calculated. Target load hours = Adjusted capacity (hours) * Target load %

- Confirmed Scheduled Hours.

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This field displays the number of hours from the Crew Schedule Workbench that have been confirmed for the period. Hours are confirmed by selecting the Confirm Metrics action for selected rows. Typically all schedules are confirmed at the end of the planning phase and the confirmed scheduled hours should match the scheduled hours. If they do not, some of the schedule have probably not been confirmed for the period. During the current period, the scheduled hours and the confirmed scheduled hours may not match due to the addition of unconfirmed/emergency work to the schedule. If the unplanned/emergency work is confirmed, then these hours become part of the confirmed schedule hours total for each crew's craft.

- Scheduled Hours. (c)

  The scheduled hours represent the number of hours that have been scheduled in the crew scheduling workbench for the period. These hours are updated when you assign a crew to a labor requirement, change a period on the workbench, or update the scheduled hours for an assignment.

- Scheduled Days.

  Scheduled days = Scheduled hours / Standard number of hours in workday in the crew's shop.

- Scheduled Headcount Equivalent.

  Scheduled headcount = (Scheduled hours / Standard number of hours in workday in the crew's shop) / Number of days in the period based on the shift.

- Variance (b – c).

  Variance = Target load hours – Scheduled hours.

- Scheduled % (c/b) * 100.

  This field represents the actual schedule load relative to the target load hours.

  Scheduled % = (Scheduled hours / Target load hours) * 100.

- Availability % (1 – c/a) *100.

  This field represents the actual schedule load relative to the adjusted capacity.

  Availability % = (1 – Scheduled hours / Adjusted capacity hours) * 100.

- Target Load %.

  You set up the target load % in the Crew Capacity Plan for the crew and period. It typically represents the crew's expected load against the adjusted capacity in terms of percentage for all planned work. Typically it is set below 100% to accommodate any unplanned/emergency entries that may occur throughout the period.

See Chapter 19, "Performing Crew Scheduling," Performing Crew Capacity Planning, page 528.

Crew Scheduling Workbench Work Order Task Labor Requirements

You actually schedule a crew to work order task labor requirements rows that display on a Workbench under the crew capacity grid. This Workbench consists of details describing information in the work order, work order task, and labor requirement rows and fields that are updated based on scheduling a crew to a row. You can schedule the crew to each individual work order task labor requirement row or you can select one or more work order task labor requirements rows on the workbench and select an action to apply to the selected rows. The Workbench data is described in this section and the actions in the next section.

The Workbench consists of five and sometimes six tabs:

- Crew Assignments.
- Resources.
- Schedules.
- Rescheduling.

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- Asset Information.
- Messages (does not always display).

The Workbench section of the Crew Scheduling Workbench typically displays any labor requirements that you defined for one or more work orders associated with the selected shop, crew, and period. For unscheduled work , the system brings in every unscheduled work order that meets the search criteria. If you want to narrow work orders to a selected period, you must enter required or schedule start and end dates in the search criteria. Once work is scheduled, the system will gather work orders associated with a specific period. Most of the data that displays in the Workbench section describes the specific work order data, work order task data, and task row data, all of which is retrieved from the work order. This information enables you to make informed decisions based on having complete information about each work order, task and labor requirement row before you schedule them. You can access everything you need to know to schedule the crew directly on the Crew Scheduling Workbench.

The remaining fields on the Workbench section of the Crew Scheduling Workbench can be affected by performing any of the actions either manually on a single row or on multiple rows by selecting the rows, selecting an action, entering the action fields that display, and selecting Go to apply the action to the row.

The data that displays on each of the Workbench tabs includes:

- Crew Assignments tab, which displays the primary work order, task, and labor requirement row data. You can directly access the work order, as well as review a description of both the task and the asset associated with the task. The remaining fields are used for scheduling, unscheduling, and rescheduling a crew to the labor requirement rows.
  - Task Status.

    This field value impacts the assignments you make and the availability of the crew scheduling fields on the workbench. You can select one or more rows in the Workbench and select the Change Status action to change the status of the task, which changes the task status in the selected row. You cannot manually change the task status field on each individual row because the field is display only.
  - Crew.

    This is the field where you assign a crew. You can also select one or more rows and select the Assign Crew action. You can remove a value from a field by selecting the Remove from Schedule action.
  - Scheduled Hours

    When you assign a crew to labor requirement rows, you enter the number of hours you want to schedule for each task row. You maintain these hours through the life of the task, since unplanned or emergency work may come up before the task is completed. When you enter this information and save the page, it updates the Crew Capacity data for the selected crew. You can enter each row manually, or select one or more rows and select the *Update Scheduled Hours* action. The Schedule hours can be updated to any positive value, even going beyond the original estimated duration of the job.
  - Carryover Hours

    Carryover hours represent the unscheduled or remaining hours that you could not schedule in the original period. You can update this field manually for an individual row or select one or more rows and select the action *Update Carryover Hours*. You can update carryover hours to any positive value, even going beyond the estimated duration of the job. This field is of particular importance when carryover work is moved on to another period
  - Completed Hours.

    As a job progresses, technicians may report along with the carryover hours, the number of actual man hours that have been completed. You can update this field manually for an individual row or select one or more rows and select the action *Update Completed Hours.*

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- Crew Schedule Status.

  The crew schedule status determines whether the labor requirement has been saved as part of a Crew Capacity Plan. The Crew Schedule Status values are:

  Unscheduled, which is the default value that displays in this field whenever a labor requirement row is generated.

  Unplanned/Emergency, which displays in this field if you assign a crew in the current period.

  Scheduled, which displays in this field if you assign a crew to any future periods (next, following and beyond).

  Schedule Confirmed, which displays in this field when you select one or more scheduled or unplanned rows and select the action *Confirm Metrics*.

Rows with a crew schedule status of *Unplanned /Emergency, Scheduled,* and *Schedule Confirmed* can derive the carryover work in the following ways:

When you schedule for a future period (next, following, or specified), if you assigned a crew to a labor requirement row within the period with the carryover hours being greater than zero, and the status of the task has not been changed to*Complete,*, then the carryover hours belong to that period .

When you schedule for a future period (next, following, or specified), if you assigned a crew to a labor requirement row for any period earlier than the *next* period, the carryover hours are greater than zero, and the task status is set to an internal status of *Open, Awaiting Schedule, Scheduled, On Hold,* or *Work in Progress.*

- The Resources tab, which displays information as to whether labor, inventory, purchase/on-hand, and tool resources are scheduled for the task associated with the craft labor requirement row. You can access the task's Schedules page in the work order to either set up or change these schedules directly from the Crew Scheduling Workbench. This enables you to determine what the other schedules are for the task, how long it may actually take to start the task, and what qualifications a technician may need to perform the task.

  There is also a link that enables you to change the shop for the crew specified on the row. This link also appears when you select the *Assign Crew* action. This field is primarily used when you want to select a crew for one or more rows that is different from the preferred you selected for the Crew Scheduling Workbench. Before you can change a crew, you must select the shop to which the crew new crew is assigned. When you select a different crew, you must select the shop to which the crew is assigned. For example, if you selected the preferred crew, Crew 1 in Shop A, to assign in the Crew Scheduling Workbench, and you find one or more of the tasks really should be performed by Crew 2 in Shop B, then you should change the shop for the rows to Shop B and then select Crew 2 for each of the rows.
- The Schedules tab, which displays the required start and end dates and times from for each work order task, also displays the crew start and end dates and times fields, which you will enter or adjust depending on the internal task status, along with other dependencies. The completed date field is also on this tab.

  - Crew start date and time.

    These fields are populated when you assign a crew to the row. The default start date is derived from the assigned period's start date. The default start time is the required start time for the task. You can apply the action *Change Crew Start Date/Time* to this field for one or more selected rows, or change the fields manually at the individual row level.

  - Crew end date and time.

    These fields are populated when you assign a crew to the row. The default end date is derived from the period's start date plus the difference between the required start and end dates for the task. The default end time is the required end time for the task. You can apply the action *Change Crew End Date/Time* to this field for one or more selected rows, or change the fields manually at the individual row level.

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- Completed date.

  This field stores the date when the crew completed the job for the task. When the internal task status is changed to *Complete*, this field is automatically updated with the completion date of the task. The completion of a task impacts the availability of many of the fields on the workbench. You can apply the action *Report Completed Date* to this field for one or more selected rows, or change the field manually at the individual row level.

- The Rescheduling tab, which displays the reason code and its description for any rows that you reschedule. If you assign a different crew or change the crew dates on any row, the system determines if a reason for the change is necessary. When you select the actions *Assign Crew, Change Period or Change Crew Start Date/Time,* , the system may require that you select a reason code for the change in the schedule.
- The Asset Information tab derives information about the asset selected for the work order task and displays it on the row.
  - Asset Location, Asset Area, Work Location.

    The field values enable you to review where the asset is located with respect to the work location to determine how this information will affect your crew assignments. For example, if the asset is located in one place and the technician is supposed to work on it in another, this might involve scheduling time for the technician to retrieve the asset and take it to the work location.
  - Asset Criticality.

    Knowing how critical the asset is to the organization may help you determine the skills and qualifications needed by your crew members to do the job.
  - Asset Calendar.

    You can access the asset's calendar to make sure that it will be available during the period that you want to schedule the crew.
  - Warranty.

    This link enables you to access any warranties that are associated with the asset or add warranties. This can be crucial in managing the costs of the work. The crew may be responsible for keeping track of the work to use in a warranty claim, which may need to be figured into the time allocated to perform the task.
  - Work History.

    This link enables you to access the work orders that were performed for the asset. This provides information about any similar work that has been done on this asset and identifies each work order. This enables you to research the work orders to possibly determine the skills and time needed to complete the work.
  - Asset Maintenance History.

    This link enables you to access the Asset Maintenance History, which helps you determine the condition of the asset based on how much maintenance has been done. This can help to determine the difficulty of this task prior to scheduling it.
- The Messages tab.

  This tab does not appear until the system issues either an informational, warning, or error message due to performing an action on an individual row or multiple rows on the Crew Scheduling Workbench. The tab displays along with an icon, which indicates the type of message that you will see when you select the Message tab. If you select an action and receive an error message, the action is not performed. However, the action will be performed when you receive a warning or informational message.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Defining Work Order Statuses, page 143.

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Crew Scheduling Workbench Actions

You use the work order labor requirement data in the Workbench to evaluate the actual work that needs to be performed in order to schedule your crews accordingly. Once the work is evaluated, you are ready to schedule your crew. You can schedule a crew to each individual row. However, one of the major benefits of the Crew Scheduling Workbench is that you can apply an action such as assigning a crew to multiple rows at one time. The actions defined on a list in the center of the workbench enable you to do everything from assigning a crew to accessing preventive maintenance projections. The following actions, which you apply to the work order task requirements on the Workbench are listed in order of functionality (rather than in the order that they appear on the dropdown list) include:

- *Assign Crew.*
- *Change Period.*
- *Change Crew End Date/Time.*
- *Change Crew Start Date/Time.*
- *Remove from Schedule.*
- *Create Labor Schedules.*
- *Confirm Metrics.*
- *Update Scheduled Hours.*
- *Update Carryover Hours.*
- *Update Completed Man Hours.*
- *Change Status.*
- *Report Completed Date.*
- *Go to Labor Assignment WB (workbench)*
- *Go to PM Projections.*

To apply an action to one or more work order task labor requirement rows in the Workbench, select the rows in the workbench and then select an action from the Action dropdown list. The system evaluates the selected data, such as the crew scheduling dates and times, against the work order task data and displays additional fields that are associated with the selected action. Once you select the action and enter the additional fields as necessary, you click the Go button. The system runs a validation process on the selected rows and applies the action. Not all actions affect the data in the rows. Some enable you to perform activities without having to exit the Crew Scheduling Workbench, such as the action *Go to PM Projections*. The following information describes how each action is used on the Crew Scheduling Workbench:

- *Assign Crew*

  You select this action to assign a crew or to change a shop and crew assignment for selected labor requirement rows.

  When you assign a crew, the system validates that the work order task status associated with the selected labor requirement row allows the crew to be changed. It also validates that the craft identified on the labor requirement row is included in the Crew Schedule Metrics. For example, if the craft in a labor requirement row is Mechanic, and the craft, Mechanic, is not defined in the Crew Capacity Plan for the selected crew and target schedule period, then the system will issue an error.

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- Crew

  You select the crew that you want to assign to the selected labor requirement rows. Typically it is the crew that you searched on to display the labor requirements rows. The system updates the following fields on the Workbench:

  The Crew field is updated with the selected crew.

  The Scheduled Hours field initially displays a default value based on the specifications on the Labor Requirements row for the task, which is equal to: Quantity (the number of craft resources) * Hours (number of hours each resource is needed).

  The Carryover Hours field initially displays the same default value as the Scheduled Hours.

  The Crew Start date is updated with the start date of the period you selected for this crew in the search criteria, and the Start Time is updated with the start time of the required start date on the work order. The Crew End date equal to the period start date plus the difference between the required start and end dates on the work order. The End Time field is updated with the end time of the required end date on the work order. The system compares these dates to the scheduled start and end dates and times on the task. The system handles the results of this comparison based on whether you selected the Override Task Schedule Dates check box and/or the Schedule Crew's Entire Period check box, which are described below.

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- Override Task Schedule Dates

  If you select the Override Task Schedule Dates check box (which defaults to selected) the task schedule dates will be updated as follows:

  If Crew Start date, which is the same as the period start date, is earlier than the Scheduled Start date for the task, the system will update Scheduled Start date for the task with the Crew Start date.

  If Crew End date, which is matched to the period end date, is later than the Scheduled End date for the task, the system will update the Scheduled End date for the task with the Crew End date.

  In other words, the scheduled start and end dates of the task are changed to accommodate the crew schedule start and end dates.

  If you do not select the Override Task Schedule Dates check box and the crew start and end dates go beyond the scheduled start and end dates for the task, the scheduled dates for the task will not be updated and an error message will be issued for the labor assignment rows on the Workbench, which prevents you from continuing. This necessitates your reevaluating your resources based on the task scheduled dates.

  For example, if the work order task scheduled start date is 4/20/06 and scheduled end date is 4/20/06:

Action	Response
Work order task Scheduled Start and Scheduled End dates:	4/20/06 to 4/20/06
Crew Scheduling Workbench period:	4/25/06 – 4/29/06
Crew Manager selects action:	Assign Crew
Override Task Schedule Dates check box:	Selected
Scheduler enters Crew Start/Start Time and Crew End/End:	4/23/06 - 4/23/06
System message displays:	Warning: 'Crew Start and End' are later than the task schedule start and end dates - When the workbench is saved, the task schedule start and end dates will be updated with the Crew End Date on this row. If other rows in this workbench are updating the task schedule dates for this task, then the one that ends the latest will be the one to be updated.
Task Scheduled Dates updated:	Task Scheduled Start Date remains the same and the Task Scheduled End is updated to 4/23/2006.
If Override Task Scheduled Dates check box:	Not selected.
System issues an error:	Error: 'Crew End' is later than the task schedule end date - The period assigned is later than the task schedule end date. To override the task schedule end dates you need to turn on the Override Task Schedule Dates Action setting.

Important! The change in the task schedule dates *will not* change the task dates for the inventory, purchase/on-hand, and tool resources task rows. However, a warning message appears for the row on the Messages tab indicating that the proposed change will impact these resources through issuing messages against each impacted row.

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- Schedule Crew's Entire Period

  When you select this check box, crew assignments and period change actions will set the Crew Start date to the schedule period's start date, and the Crew End date will be set to the period end date.

  If you do *not* select the Schedule Crew's Entire Period check box, any action that would perform a change in the Crew Start and End Dates will respect their original offset. If you do not assign any crew to the row before you changed the crew start and end dates, then the system will respect the offset between the Required Start and End dates. If you assigned crew a crew before you changed the crew start and end dates, then the system respects the offset of the original Crew Start and End Dates.

  For example, if you scheduled Crew A to a task row from 8/14 to 8/15 (2 days) during the period of 8/12 - 8/19. The Schedule Crew's Entire Period check box is *not selected.* You find you must change the crew schedule dates for Crew A to 8/14 - 8/16 (3 days), because you are notified that the inventory resources will not be delivered on time for the crew to do the work during this period. When you select the row and select the action to change the period to the target period of 8/20 - 8/27, the system carries over the change to the crew schedule dates to the start date of the next period. Since the original Crew Schedule dates were 8/14 - 8/16 (3 days), the new Crew Schedule dates for the assignment display for the scheduled row as 8/20 - 8/22 (3 days).

  If, however, based on this example, you *selected* the Schedule Crew's Entire Period check box, then the target Crew Schedule dates for the assignment would be 8/20 - 8/27, which are the same dates as the target period dates.

- Change Shop for Crew

  This link is described for the Resources tab on the Workbench.

  See Chapter 19, "Performing Crew Scheduling," Defining the Crew Scheduling Workbench Resources Tab, page 567.

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- Things to consider when changing a crew assigned to selected rows to different crew include:

  The period assigned to the row is determined by the period specified on the Search Criteria. However, the Schedule Pattern used by the new crew can differ from the original crew. Also, the Schedule Pattern of the new crew may not be able to accommodate the time span (Crew Start Date – Crew End Date) allocated to the requirement, which causes an error.

  If you change the crew, the selected period in the Workbench is Current and if the row's original Crew Schedule Status is Schedule Confirmed or Unplanned/Emergency, then you must select a reason code to explain the reason for changing to a different crew. In addition, the Crew Capacity Plan for the original crew and period will be updated.

  If you change a crew (Crew A) that is scheduled in the current period to another crew (Crew B) then the system determines the current period for Crew B and updates the crew dates and times based on the current period for Crew B. If you change the crew and the period for the allocated rows is Current or Prior, the Schedule Status will be set to *Unplanned/Emergency*, otherwise it will be set to *Scheduled*. This is further detailed in the corresponding Schedule Status State Chart Diagram

  ---

  Note. If both crews are associated with the same schedule pattern, no changes occur.

  If labor schedule rows related to the selected requirement rows were generated for the work order task, however, no assignments were performed or the internal task status is *not Work In Progress,* then the system will update the crew (and period, if applicable) information on the labor schedule rows for the work order task.

  If schedule rows related to the selected requirement rows were generated and assignments were performed, the row is being procured or the internal task status *is Work In Progress,* then the system will generate new labor schedule rows. You determine whether new labor schedule rows must be generated based on if a change in period will occur as a consequence changing in the assigned crew.

- *Change Crew End Date/Time*

  Selecting this action will change the crew end date and time of the selected rows to those specified by the user. You enter the date and time that you want to update the Crew End date and End Time fields in the selected rows. The end date must be later than or the same as the start date. If the end date is the same as the start date, then the end time must be later than the start time. The combination of start and end dates must fall within the specified period range. If the revised dates do not fall within the work order task scheduled dates and times, you can select the Override Task Schedule Dates check box to use the new dates.

- *Change Crew Start Date/Time*

  Selecting this action enables you to select a different crew start date and time for selected labor requirement rows. You select a date and time in the action fields and the system replaced the dates that are in the Crew Start date and Start Time fields with this new date and time. You can select the Override Task Schedule Dates check box if to override the scheduled dates and times in the task if the new dates and times do not fall within task scheduled dates and times.

  If the change in the crew start date and time moves the selected labor requirement rows to a new period, you must also select a reason for the change. You must assign a crew to the selected labor requirement rows, before you can move the labor requirement to another period. The Reason and Description fields do not display for Unscheduled labor requirement rows and does not update the rescheduling history.

  Note. It is possible that changing the crew start date and time may change the assigned period for the selected rows. Please refer to the discussion of the Change Period action for further information.

- *Change Period*

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Selecting this action enables you to change the period to the current, following, next, previous, or specified period. When you first assign a crew to select labor requirement rows, you also assign a period which updates the Crew Start date field with the period start date and the Crew End date field with a value that is equal to the crew start date plus the offset between the required start and end date on the work order. The crew end date cannot go beyond the period's end date. When you change the period for selected rows, the new period must exist in the Schedule Pattern associated with the assigned crew and a Crew Capacity Plan must be set up for that period, crew and craft.

You can select the Override Task Schedule Dates check box if the new period's start and end dates and times do not fall within the scheduled start and end dates and times of the work order task associated with the row. You can also select the Schedule Crew's Entire Period check box if you want the Crew End date to be the same as the period end date.

Whenever you move a *scheduled* resource to another period, you may need to enter a reason code. The schedule pattern associated with the crew determines what the current period and its date range. When you change the period for Confirmed or Unplanned/Emergency scheduled work orders, it pushes the data into the rescheduling history and updates the Schedule Metrics for the impacted crew, craft and original period. The Carryover Hours field must be updated to reflect the amount of work that has to be pushed onto the target period. When you make crew assignments to *unscheduled* requirements, a reason code is required depending on the action(s) you perform, such as assigning a crew in the current period, confirming metrics, and changing the period to *next.*

Changing a period also has implications on related labor schedules. When you select the Assign Crew action, a period may be indirectly changed if the crew is changed. The following scenarios describe what would happen in each change period situation relative to the existence of individual schedules:

- If you did not make assignments to the labor schedule rows in the task and the internal task status is not Work in Progress, the impacted rows will be updated with the new period.
- If you *made assignments* to the labor schedule rows, procured the row or the internal task status *is* Work In Progress, the new schedule rows will be generated to reflect the change in period.

  In both situations individual resources must be rescheduled by accessing the Work Order component or the Labor Assignment Workbench. If the carryover hours are different from the original period's duration, these hours will be equally distributed to the scheduled rows and the remainder will be added to the last row.

Note. You can only assign crews to rows in previous periods if the period is not the period before the current period. To assign a crew to a past period, the Allow Override Metrics check box must be selected on the User Preferences, Maintenance Management page.

- *Change Status*

Selecting this action enables you to select a new task status and access the Change Status page to change the task status of the selected labor requirement rows. You can optionally add a note on the Change Status page concerning the change of status and select a Notify Scheduler check box that will notify the scheduler about the change. If you selected multiple rows for the same task, the information passed on to the Change Status page only passes one row per task. However, the status change affects all of the rows associated with the task. The status change is updated on the Task Status field for the selected rows.

Changing to another status on the Work Order task impacts the fields on the Crew Scheduling Workbench. When you set the task status to *Complete,* the following updates will occur:

- Carryover hours for all of the task's labor requirements will be set to zero if they are not already zero.
- The completed date for all of the task's labor requirements will be set to the task's completion date for all rows that have a blank Completed Date field and with carryover hours that are greater than zero.

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Note. When the carryover hours for all of the task labor requirement rows are zero, the system does not automatically update the task's status to *Complete.*

- *Confirm Metrics*

  Select this action to update the Crew Schedule Status field for the selected rows to *Schedule Confirmed*. In past or current periods, you must select the Update Crew Schedule Metrics check box on the User Preferences - Maintenance Management page to enable a user to perform this action. The action is only applied to rows with a Crew Schedule Status value of either *Unplanned/Emergency* or *Scheduled*. This action will update the Confirmed Schedule Hours on the Crew Capacity grid. When you save the page, these changes are saved in the Crew Capacity Plan.

- *Create Labor Schedules*

  Selecting this action will create labor schedule rows on the Schedules page of the work order from the selected Labor Requirement rows. This works the same as when you select the Copy from Requirements button in the Work Order, except that this action only applies to labor resources. This action creates labor schedule rows for labor requirements that have not been copied or scheduled in the work order.

- *Go to Labor Assignment WB*

  Selecting this action transfers you to the Labor Assignments Workbench.

  See Chapter 19, "Performing Crew Scheduling," Using the Labor Assignment Workbench, page 571.

- *Go to PM Projections*

  Selecting this action transfers you to the Preventive Maintenance View Projection Summary component after you select a preventive maintenance projection Process Instance.

- *Remove from Schedule*

  Selecting this action removes the selected rows from the schedule, which unschedules the Crew from the row and the period. If you select this action in a current or previous period, the system prompts you for a Reason Code and Description. If labor schedule rows that are based on the selected labor requirement rows exist in the work order and you select the Remove form Schedule action:

  - If you have not made assignments on the labor schedule rows for the task, or if the task status is *not Work in Progress,* then the labor schedule rows are not affected.
  - If you made assignments on the labor schedule rows for the task, or if the task status is *Work in Progress*, then new labor schedule rows will be generated.

- *Report Completed Date*

  Selecting this action will update the Completed Date field and change the Carryover Hours for the selected rows to zero. After selecting the action, you select the date the task was completed. The primary purpose for selecting a completed date is to indicate in the system that the assignment has been completed. You cannot update carryover hours or enter a completed date if the Crew Schedule Status for the row is *Unscheduled*.

- *Update Carryover Hours*

  Selecting this action will change the value on the Carryover Hours field) of the selected rows . A field displays for the action on which you can enter a number greater than zero. If you enter zero on the field to update the carryover hours, a Completed date field displays. This is because setting the carryover hours to zero indicates that the work has been completed, which triggers the need to enter the completed date. You will receive an error if the selected rows are unscheduled and you enter carryover hours and/or completed date. .

- *Update Completed Man Hours*

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Selecting this action will change the Completed Man Hours for the selected rows to the value that you enter on the field associated with this action.

- *Update Scheduled Hours*

  Selecting this action will change the Scheduled Hours for the selected rows to the value that you enter on the field associated with this action. When you select the Scheduled Hours action and enter scheduled hours for the selected rows, the system updates the Scheduled Hours on the Crew Capacity grid. as long as the crew, craft, and period on the selected rows also appear on the Crew Capacity grid. This action should issue an error if the row(s) are unscheduled. If the rows selected are confirmed then the action should issue an error not allowing this value to change.

Pages Used for Scheduling Crews

Page Name	Object Name	Navigation	Usage
Crew Scheduling Workbench Search	WM_CREW_SRCH_SEC	Maintenance Management, Workbenches, Crew Scheduling Workbench	Enter search criteria to search for a crew and work orders to schedule.
Crew Scheduling Workbench	WM_CREW_SCHD_WB	Maintenance Management, Workbenches, Crew Scheduling Workbench	Schedule crews to work order task labor requirement lines.
Work Order	WM_WO_HDR	• Select the Crew Assignments tab (or the Resources, Schedules, Rescheduling, Asset Information, or Messages tabs) on the Crew Scheduling Workbench page and click the Work Order ID link. • Maintenance Management, Work Order Management, Work Order	Access and modify the selected work order.
WO Task Descriptions	WM_WO_CS_TSK_SEC	Select the Crew Assignments tab on the Crew Scheduling Workbench page and click the Task Descriptions link.	Review selected work order task description.
Asset Information	WM_WO_ASSET_SEC	Select the Crew Assignments tab on the Crew Scheduling Workbench page and click the Asset ID Description link.	Review work order task asset characteristics and attributes.
Change Shop to Identify Crew	WM_CSVW_BUSHOP_SEC	• Click the *Assign Crew* action on the Crew Scheduling Workbench and click the Change Shop for Crew link. • Select the Resources tab on the Crew Scheduling Workbench and click the Change Shop for Crew link.	Change the shop for the crew being scheduled.

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Page Name	Object Name	Navigation	Usage
Schedules	WM_WO_TASK_SCHED	• Select the Resources tab on the Crew Scheduling Workbench page and click the Labor link. • Select the Resources tab on the Crew Scheduling Workbench page and click the Inventory link. • Select the Resources tab on the Crew Scheduling Workbench page and click the Purchase/On-Hand link. • Select the Resources tab on the Crew Scheduling Workbench page and click the Tools link. • Maintenance Management, Work Order Management, Work Order	Access and modify, if necessary, either the Labor Schedules grid, Inventory Schedules grid, Purchase/On-Hand Schedules grid, or Tool Schedules grid for a task in the work order.
Work Order History for Asset (ID)	WM_ASSETTSK_SEC	Select the Asset Information tab on the Crew Scheduling Workbench page and click the View Work History link.	Review the work order task history and status for the task asset.
Maint History by Type (maintenance history by type)	ASSET_MAINT_SUM_01	• Select the Asset Information tab on the Crew Scheduling Workbench page and click the Asset Maint History link. • Asset Management, Service and Maintenance, Review Maintenance History	Review the maintenance, costs, and work order information for any maintenance performed on the task asset.

Using the Crew Schedule Search Page

Access the Crew Scheduling Workbench Search page.

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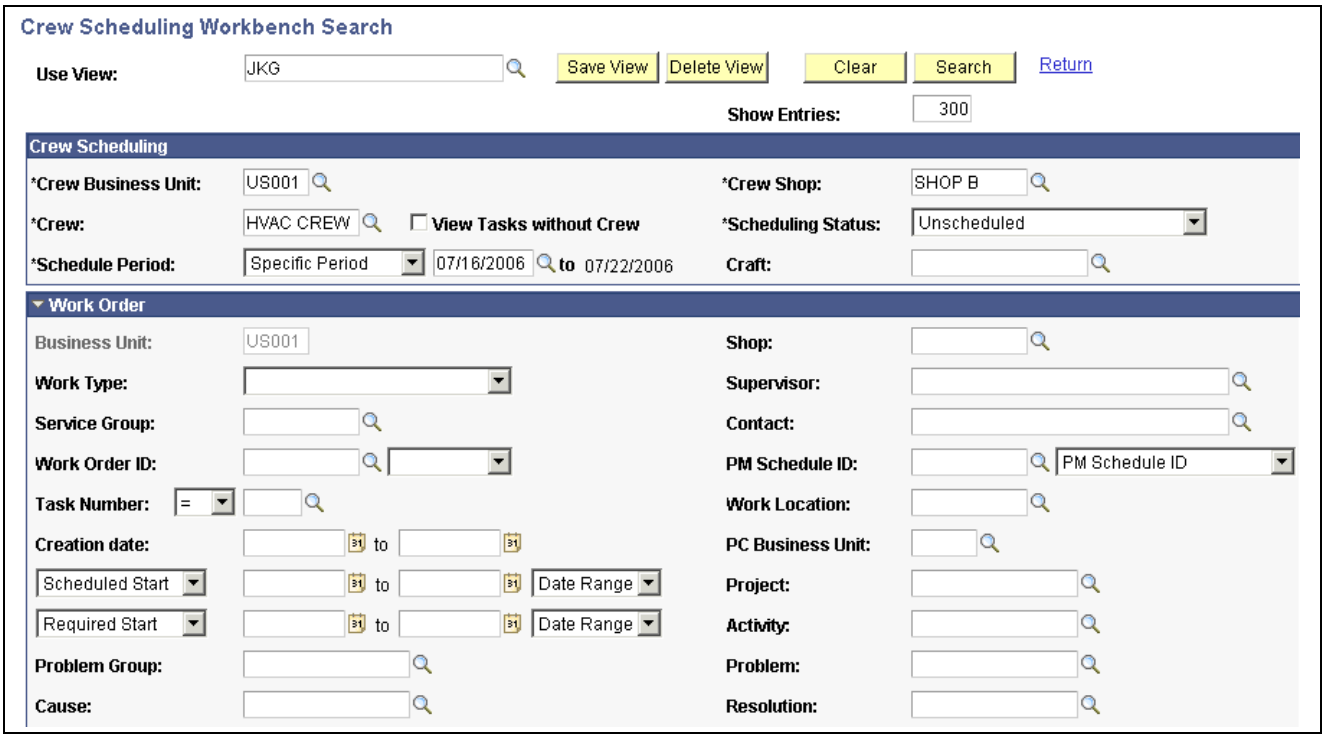
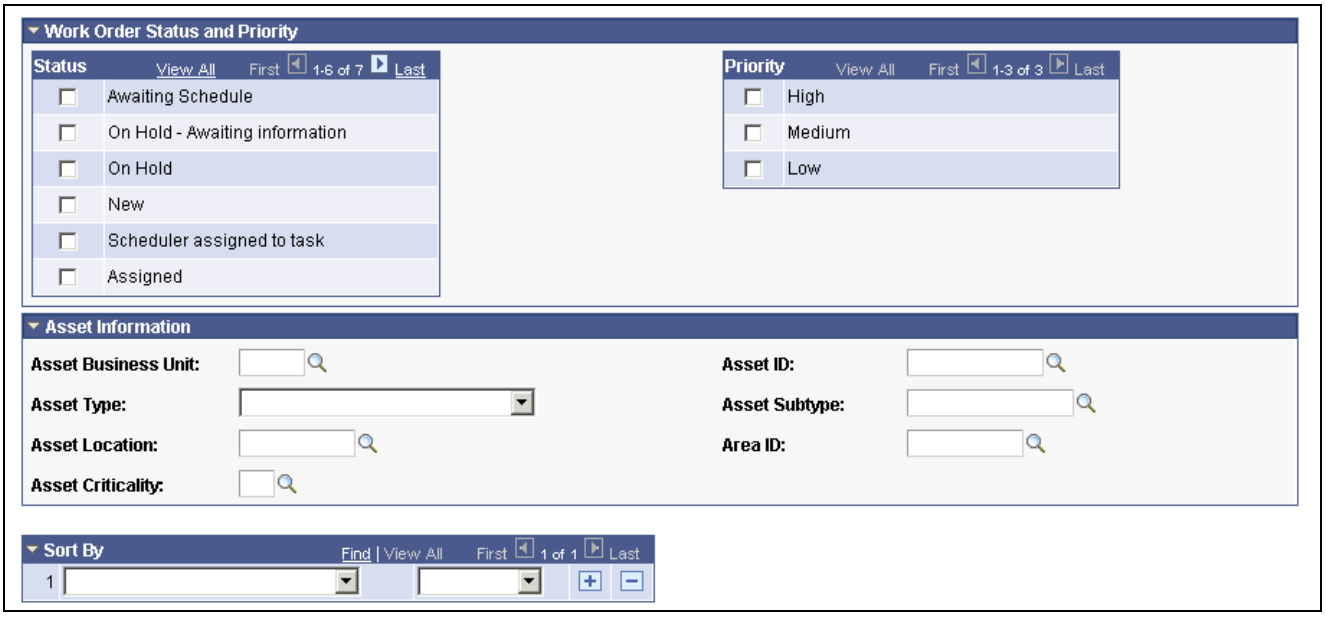


Crew Scheduling Workbench Search page (1 of 2)



Crew Scheduling Workbench Search page (2 of 2)

Use View Select an existing saved view as your search criteria.

Save View Click this button if you change the criteria in a view or create a view of new search criteria. If you modified an existing view, the system asks if you want to override the view. If this is a new view, the system saves the view with the new name that you enter in the Use View field.

Delete View Click this button to delete the current view. The system asks if you are sure that you want to delete the view.

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Clear Click this button to clear all the field values in a view.

Search Click this button after entering any required or additional search criteria. The system searches for and displays a crew capacity plan for the selected crew and period and displays any work orders in the workbench grids that are either scheduled or can be scheduled based on the criteria.

Return Click this link to return to the workbench.

Crew Scheduling Search Criteria

Crew Business Unit Select the work order business unit associated with a crew. The system searches for work order tasks associated with this selected business unit for unscheduled work orders, and for labor requirements associated with this business unit value for scheduled and carryover work orders. This is a required field.

Crew Shop Select the shop to which this crew is assigned. The system searches for this selected shop value in work order tasks associated with this shop for unscheduled work orders, and searches for this selected shop value in the labor requirements for scheduled and carryover work orders. This is a required field.

Crew Select a crew associated with the crew business unit and shop. The system searches for work order tasks that have the selected crew value in the Preferred Crew field of a task for unscheduled work orders. It searches for this selected crew value in the Crew field of a task's labor requirements for scheduled and carryover work order tasks. This is a required field.

View Tasks without Crew Select this check box to search for and display any unscheduled work orders with tasks that do not have a default value in the Preferred Crew field of a work order task.

Scheduling Status Select:

- *Unscheduled.*

  Select this option to search for work order labor requirements in which crews have not yet been assigned. The selected schedule period is not included in the search criteria because unscheduled work orders are not yet assigned to a period.

- *Carryover Work.*

  Select this option to search for all work orders with labor requirements tasks that have unfinished work

  Note. Unfinished work refers to crew assignments where the completed date is blank and carryover hours exist.

- *Review Entire Crew Schedule.*

  Select this option to work in conjunction with the values in the business unit, shop, crew, and period fields to display all work orders that are scheduled to the specified crew. It has a complete view of the scheduled work prior to confirming the work, which enables you to verify all of the schedules, including those that you might otherwise have missed.

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Note. When you select this value, all other search criteria other than those mentioned above are disabled and contain their default values.

- *Scheduled.*

  Select this option to search for work orders that have been assigned a crew. The crew schedule status of the rows that display can be *Unplanned,Scheduled,* or *Schedule Confirmed.*

Schedule Period Select one of these periods:

- *Previous Period.*

  This is the period immediately before the current period. .

- *Current Period.*

  This is the period determined by the current date (today's date) falls within the period's start and end date. .

- *Next Period.*

  This is the period immediately after the current period.

- *Following Period*

  This is the period following the next period.

- *Specific Period.*

  Selecting this option enables you to enter a specific period start date.

The previous, next, and following period options depend on the period that the system identifies as the current period for the crew. If the system does not identify the current period, you can only select a specific period.

Craft Select a craft to display labor requirements associated with this specific craft.

Work Order Search Criteria

The fields in this group box are common to all work orders and work order tasks. Select the criteria to narrow your search for specific work orders. If you specify a shop, the system searches for the shop specified in the work order header information.

See Chapter 14, "Creating a Work Order," page 363.

Work Order Status and Priority Search Criteria

You can search for work orders based on selecting one or more user-defined work order task statuses that have an internal status of:

- Open.
- On Hold.
- Awaiting Schedule.
- Scheduled.
- Work in Progress.

You can also select one or all of the work order priorities to use in your search.

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See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Defining Work Order Statuses, page 143.

Asset Information

Select the asset information to narrow your search to display work orders and work order tasks based on specific asset characteristics and attributes.

See Chapter 14, "Creating a Work Order," Understanding Work Orders, page 363.

Sort By Search Criteria

Sort By

Select one of the following field names and select whether you want to sort the field values in Crew Scheduling Workbench in either *Ascending* or *Descending* order:

- *Asset Area*
- *Asset Criticality*
- *Asset ID - Description*
- *Asset Location*
- *Completed Date*
- *Craft*
- *Crew*
- *Crew End Date*
- *Crew End Time*
- *Crew Schedule Status*
- *Crew Start Date*
- *Crew Start Time*
- *Priority*
- *Required End Date*
- *Required End Time*
- *Required Start Date*
- *Required Start Time*
- *Requirement Line Number*
- *Task Description*
- *Task Status*
- *Work Order ID*
- *Work Order Type*

Important! You can add rows to select more than one field name.

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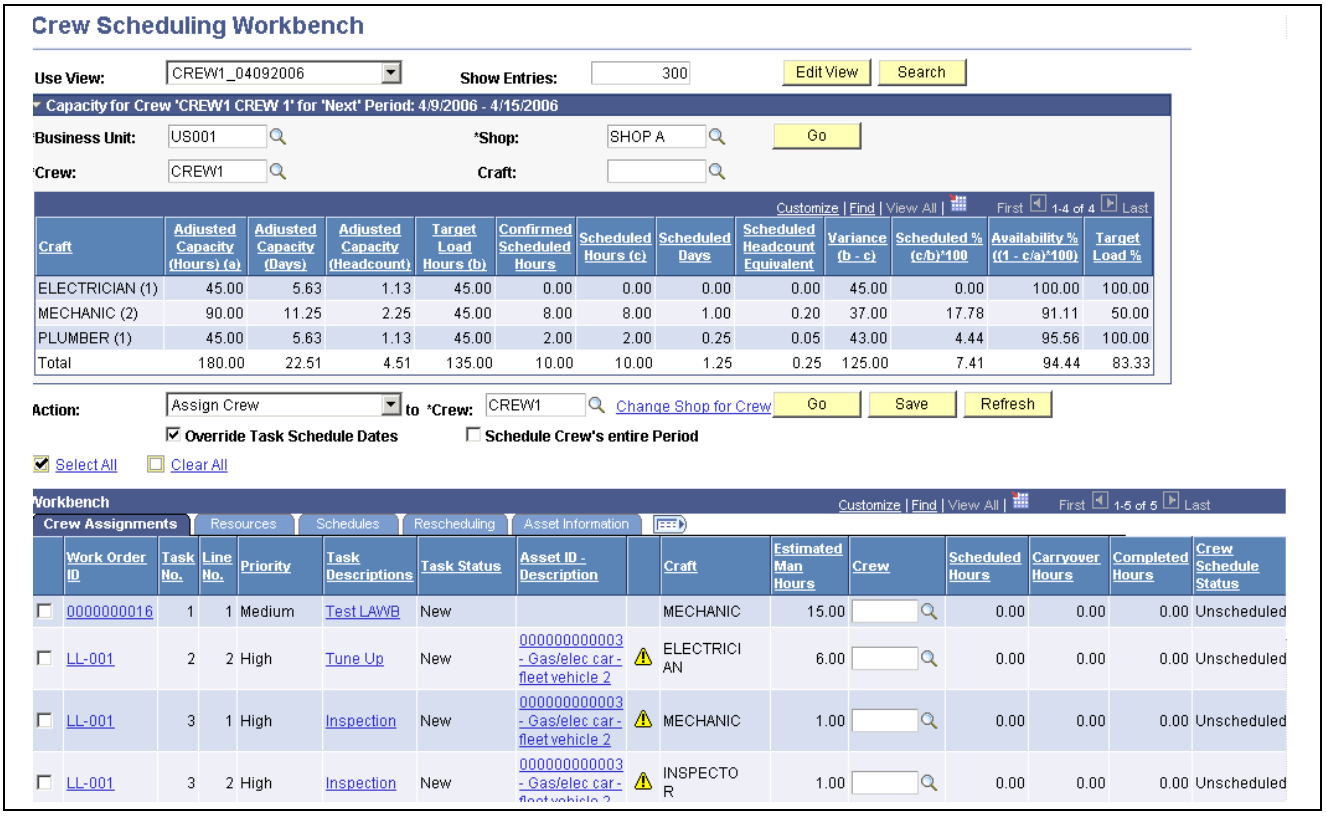
Scheduling Crews to Multiple Work Orders

Access the Crew Scheduling Workbench page.



Crew Scheduling Workbench page

Capacity for Crew

Crew Business Unit Select the work order business unit associated with the shop that contains the crew for which you want to display capacity.

Crew Shop Select the shop that contains the crew for which you want to display capacity.

Crew Select the crew for which you want to display capacity.

Craft Select a craft associated with the selected crew, if you want to display capacity for only one craft.

This field is optional.

Go Click this button after entering all or some of the search criteria (business unit, shop, crew, craft) associated with a crew. This enables you to display the crew capacity data for a different crew.

Adjusted Capacity (Hours) Displays the adjusted capacity in hours, which is set up as part of the metrics for the crew and period. It typically represents the crew's: Total shift hours for the period – Any time off (vacation, holidays, sick days and more)

Adjusted Capacity (Days) Displays the adjusted capacity in days, which is set up as part of the metrics for the crew and period. It typically represents the crew's: (Total shift hours for the period – Any time off) / Standard day hours defined in the crew's shop.

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Adjusted Capacity (Headcount) Displays the adjusted capacity headcount, which is set up as part of the metrics for the crew and period. It typically represents the crew's: The adjusted capacity days / The number of days in the schedule period.

Target Hours Displays the calculated target load hours in which Target load hours = Adjusted capacity (hours) * Target load %.

Confirmed Scheduled Hours Displays the number of hours from the crew schedule that are confirmed for the period. Scheduled hours are confirmed when you select the action Confirm Metrics, which updates the data in the crew capacity plan based on the selected rows.

Scheduled Hours Displays the total number of hours for which a craft is scheduled for the period.

Assigning a crew to a requirement, updating scheduled hours or changing a period updates the value in this field.

Scheduled Days Displays the total number of days for which a craft is scheduled. Scheduled days = Scheduled hours / Standard number of hours in workday in the crew's shop.

Scheduled Headcount Equivalent Displays the total headcount for which a craft is scheduled. Scheduled headcount = (Scheduled hours / Standard number of hours in workday in the crew's shop) / Number of days in the period based on the shift.

Variance (b – c) Displays the difference between the scheduled hours and the target load hours.

Scheduled % (c/b * 100) Displays the actual schedule load relative to the target load hours. Scheduled % = (Scheduled hours / Target load hours) * 100.

Availability % (1– c/a) * 100 Displays the actual schedule load relative to the adjusted capacity. Availability % = (1 – Scheduled hours / Adjusted capacity hours) * 100.

Target Load % Displays the crew's expected load against the adjusted capacity in terms of percentage for all planned work. Typically it is set below 100% to accommodate any unplanned/emergency entries that may occur throughout the period.

See Chapter 19, "Performing Crew Scheduling," Understanding Crew Capacity Planning, page 528.

Actions

This section describes each selected action and its relationship to the Crew Scheduling Workbench.

Action Select work order rows in the Workbench and select an action to perform on the selected rows. Select:

- *Assign Crew.*

  Selecting this action displays:

  - A to Crew: Field in which you can select the crew that you want to assign to the selected work orders task rows. The crew specified in the search criteria displays as the default crew in the field.

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- A Change Shop for Crew link, which you can click to access the Change Shop to Identify Crew page where you select a different Crew Shop in which to associate a crew.

  See Chapter 19, "Performing Crew Scheduling," Understanding Crew Scheduling, page 539.

- An Override Task's Schedule Dates check box which is selected by default.

  If you do not select this check box , the crew assignment may result in error on some or all of the selected rows if the crew start or end dates fall off the date range established by the task's scheduled start and end dates. beyond the established task schedule date. You also cannot change the task schedule dates after the crew is scheduled. If this check box is selected, the task schedule dates expand or collapse to fit the period to which the crews are scheduled.

  See Chapter 19, "Performing Crew Scheduling," Understanding Crew Scheduling, page 539.

- A Schedule Crew's Entire Period check box. If you select this check box, the system sets the crew end date to the period's end date.

- Reason

  Select a reason code, which explains why you are assigning the crew. Reason codes and descriptions are saved on the Reschedule History.

  Note. This field displays on the page when the period specified is *Current* or a period previous to the current period, or the crew scheduling status is *Carryover Work.*

- Description

  Enter a more thorough description of why you are assigning this crew.

  Note. This field displays on the page when the period specified is *Current* or a period previous to the current period, or the crew scheduling status is *Carryover Work.*

• *Change Crew End Date/Time.*

  Selecting this action displays:

- A to field in which you can enter or select a new crew end date, which is updated on the Schedules grid for the selected rows.

- A blank field in which you can enter a new crew end time, which is updated on the Schedules grid for the selected rows.

  Note. The time field is not required to perform the action. If you leave the field blank, the crew end times of the selected rows do not display as overridden.

- An Override Task Schedule Dates check box is selected and can be changed.

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- A Reason field in which you must select a reason code whenever a resource is moved to another period.

Note. This field displays on the page when the period specified is *Current* or a period previous to the current period, or the crew scheduling status is *Carryover Work.*

- A Description field in which you can enter a longer description for the change.

Note. This field displays on the page when the period specified is *Current* or a period previous to the current period, or the crew scheduling status is *Carryover Work.*

- *Change Crew Start Date/Time.*

  Selecting this action displays:

  - A to field in which you can enter or select a new crew start date, which is updated on the Schedules tab for the selected rows.
  - A blank field in which you can enter a new crew start time, which is updated on the Schedules tab for the selected rows.

Note. The time field is not required to perform the action. If you leave the field blank, the crew end times of the selected rows do not display as overridden.

  - An Override Task Schedule Dates check box is selected and can be changed.
  - A Reason field in which you must select a reason code whenever a scheduled resource is moved to another period.

Note. This field displays on the page when the period specified is *Current* or a period previous to the current period, or the crew scheduling status is *Carryover Work.*

Important! Before you can move a requirement to another period, you must first assign the requirement to a crew.

  - A Description field in which you can optionally enter a longer description for the change.

Note. This field displays on the page when the period specified is *Current* or a period previous to the current period, or the crew scheduling status is *Carryover Work.*

- *Change Period.*

  Selecting this action displays:

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- A to field in which you can select a value of: *Current Period*, which transfers the rows to the current period; *Next Period,* which transfers the rows to the next period relative to the current period; *Following Period*, which transfers the rows to the following period relative to the current period;*Previous Period,*which transfers the rows to the previous period relative to the current period; *Specific Period,* which transfers the rows to the period specified on the field that displays next to the period.
- An Override Task's Schedule Dates check box which is selected by default.

  See Chapter 19, "Performing Crew Scheduling," Understanding Crew Scheduling, page 539.
- A Schedule Crew's Entire Period check box.
- Reason
- Description

• *Change Status.*

Selecting this action enables you to change the task status to any available task status.

- Open
- Awaiting Schedule
- Hold
- Scheduled
- Work in Progress
- Canceled

You can notify the scheduler using the Change Status page of the status change.

Important! Selecting a task status displays the Change Status page for the selected rows. If you selected multiple rows for the same task, only one row representing all of these rows display on the Change Status page. When you change the status of this row, the system changes the status of all of the rows associated with the task, whether you selected them or not. When you select OK, you are returned to the Crew Scheduling Workbench.

Once you select a status, the Change Status page validates the status transitions and displays an error if the status change is not valid.

• *Create Labor Schedules.*

Select this action to create Labor Schedule rows from the selected requirement rows, which can be subsequently displayed in the Labor Assignments workbench and in the Schedules page Labor Schedules tab of the work order. This action works like copying requirements to the schedule rows in the Work Order component. Selecting this action automatically saves the component.

• *Go to Labor Assignment WB.* (workbench)

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Selecting this action displays the Labor Assignment Workbench, passes in the selected crew and schedule period, and automatically executes the search to display the labor schedule rows.

- *Go to PM Projections.*

  Selecting this action displays the View Projections component search page. You enter a PM Projection Process Instance number and select Go to directly access the PM Projections based on this process instance.

- *Remove from Schedule.*

  Unassigns the crew from the row and the period:

  - Reason
  - Description

  See Chapter 19, "Performing Crew Scheduling," Understanding Crew Scheduling, page 539.

- *Report Completed Date.*

  Selecting this action displays a date field in which you can select the date the selected rows were completed. When you select the Go button, this date is updated in the Completed field on the Schedules tab's grid for each row. You can change this date. Any carryover hours are set to zero and all the fields in the Crew Schedules Workbench are locked except for the Completed Date field.

  Important! Selecting Report Completed Date should be the last thing you do on the Crew Scheduling Workbench. This does not change the task status to Complete in the work order. You access task in the Technician Workbench to change the task status to Complete. However, you must make sure the actual dates are updated in the work order.

  You can set a task to complete form the Crew Scheduling Workbench if all validations for setting a task to complete passed.

- *Update Carryover Hours*

  Enter carryover hours for the selected rows. If you enter zero carryover hours, then the Completed (date) field display for which you can select a the date the task was completed for the rows.

- *Update Completed Man Hours.*

  Selecting this action displays a to field in which you can enter the number of man hours that it took to complete the selected task row.

- *Update Schedule Hours*

  Selecting this action displays a to field in which you can enter the number of schedule hours that it takes to complete the selected task row.

- *Confirm Metrics.*

  When you select the *Confirm Metrics* action for the same row, the system updates the metrics in the crew capacity grid if the crew and period in the grid match the crew and period in the row. The system does not update the actual capacity in the database until you save the Crew Scheduling Workbench.

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Go Click this button to perform the selected action and validate the action for the selected rows and displays warning, error, and informational messages in the Message tab, which only displays when messages are generated.

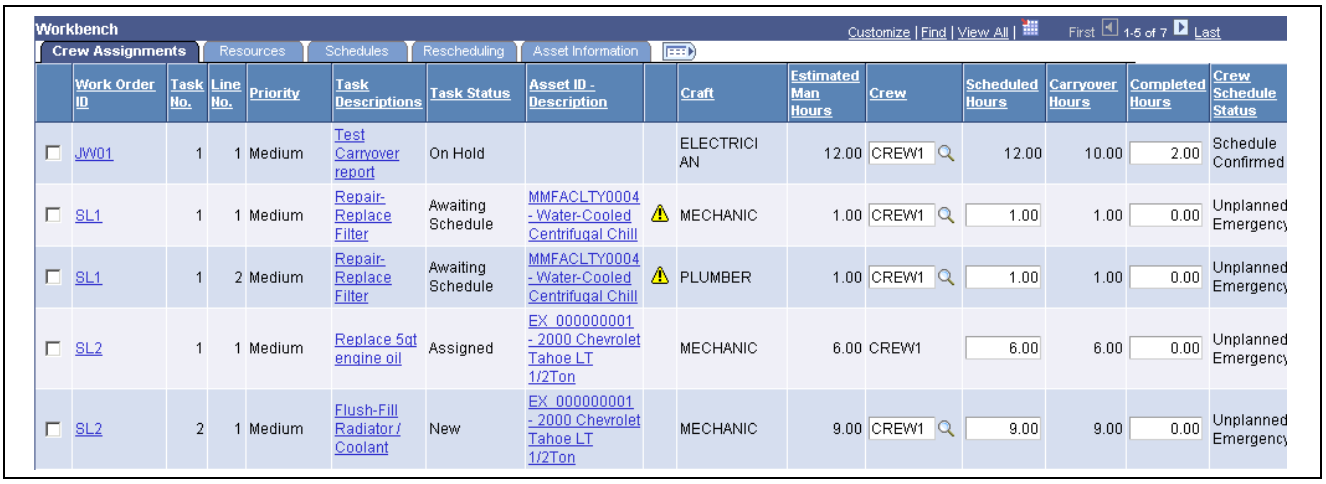
Important! Clicking the Go button does not save the changes resulting from the action. You must click the Save button.

Save Click this button to save the Crew Scheduling Workbench. This also , updates the crew schedule metrics in the appropriate crew capacity plan.

Refresh Click this button to refresh changes made in the Assignments tab and update the Availability tab. This causes deferred processing on field changes to proceed.

Defining the Crew Scheduling Workbench Crew Assignments Tab

Access the Crew Scheduling Workbench - Crew Assignments tab.



Workbench — Customize | Find | View All | First 1-5 of 7 Last

Crew Assignments | Resources | Schedules | Rescheduling | Asset Information

	Work Order ID	Task No.	Line No.	Priority	Task Descriptions	Task Status	Asset ID - Description		Craft	Estimated Man Hours	Crew	Scheduled Hours	Carryover Hours	Completed Hours	Crew Schedule Status
☐	JW01	1	1	Medium	Test Carryover report	On Hold			ELECTRICIAN	12.00	CREW1	12.00	10.00	2.00	Schedule Confirmed
☐	SL1	1	1	Medium	Repair-Replace Filter	Awaiting Schedule	MMFACLTY0004 - Water-Cooled Centrifugal Chill	⚠	MECHANIC	1.00	CREW1	1.00	1.00	0.00	Unplanned Emergency
☐	SL1	1	2	Medium	Repair-Replace Filter	Awaiting Schedule	MMFACLTY0004 - Water-Cooled Centrifugal Chill	⚠	PLUMBER	1.00	CREW1	1.00	1.00	0.00	Unplanned Emergency
☐	SL2	1	1	Medium	Replace 5qt engine oil	Assigned	EX 000000001 - 2000 Chevrolet Tahoe LT 1/2Ton		MECHANIC	6.00	CREW1	6.00	6.00	0.00	Unplanned Emergency
☐	SL2	2	1	Medium	Flush-Fill Radiator / Coolant	New	EX 000000001 - 2000 Chevrolet Tahoe LT 1/2Ton		MECHANIC	9.00	CREW1	9.00	9.00	0.00	Unplanned Emergency

Crew Scheduling Workbench page - Crew Assignments tab

Work Order ID Click this link to access this specific work order in the Work Order component.

Task No. (task number) Identifies a task associated with each work order ID (display-only field).

Line No. (line number) Identifies the labor requirement line number associated with this task (display-only field).

Priority Displays the level of priority of the work order associated with this task (display-only field).

Task Descriptions Click this link to access the WO Task Descriptions secondary page, which displays the work order ID, business unit, and task description.

Task Status Displays the current status of the work order task. You can change the status of each task line by selecting the row and selecting an action of *Change Status.*

Asset ID Description Click this link to access the Asset Information page, which lists the characteristics and attributes of the asset along with a long description of the asset.

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Click this Warranties icon to display the Asset Warranties page where you can create a warranty claim or apply a warranty template to the claim. This icon displays when an asset has active warranties.

See Chapter 16, "Managing Warranty Claims," page 415.

Displays this Hazardous icon if an asset is associated with any hazardous regulations (display-only field).

Craft

Identifies each craft assigned to a task row based on the work order labor requirements definition (display-only field).

Estimated Man Hours

Displays the labor requirement hours from the work order.

Crew

Select a crew to perform a crew assignment, if desired. This field is also changed when you select one or more rows and select the *Assign Crew* action and select a different crew. If you select the *Remove from Schedule* action, this Crew field is blank.

Scheduled Hours

Enter or update the hours on the task that have been scheduled for the selected crew. This field value is also updated when you select one or more rows and select the *Update Scheduled Hours* action.

Note. You must enter a positive value, which can exceed the estimated duration of the task. This field is available for entry as long as you do not select Report Completed Date for this row.

Carryover Hours

You can update the number of remaining hours that are still available to schedule for the crew, which you can carry over to the next period, if desired. You can also select one or more rows and select the Update Carryover Hours action and update the carryover hours for each selected row.

Note. You must enter a positive value, which can exceed the estimated duration of the task. This field is available until you mark the row completed using the Report Completed Date action. You must also have the Report Crew Carryover Hours check box selected for the user in User Preferences.

Completed Hours

Enter the number of man hours that have been completed. These hours are usually reported by technicians. You can also select one or more rows and the *Update Completed Hours* action to update this field value.

Crew Schedule Status

Displays one of these values to indicate the current status of the crew schedule:

- *Unscheduled*

  This is the default value, which displays when a labor requirement row is generated.

- *Unplanned/Emergency*

  This value applies to a labor requirement row if a crew is assigned to the current or any past periods.

- *Scheduled*

  This value applies to a labor requirement row if a crew is assigned to any future periods (next, following, beyond).

- *Schedule Confirmed*

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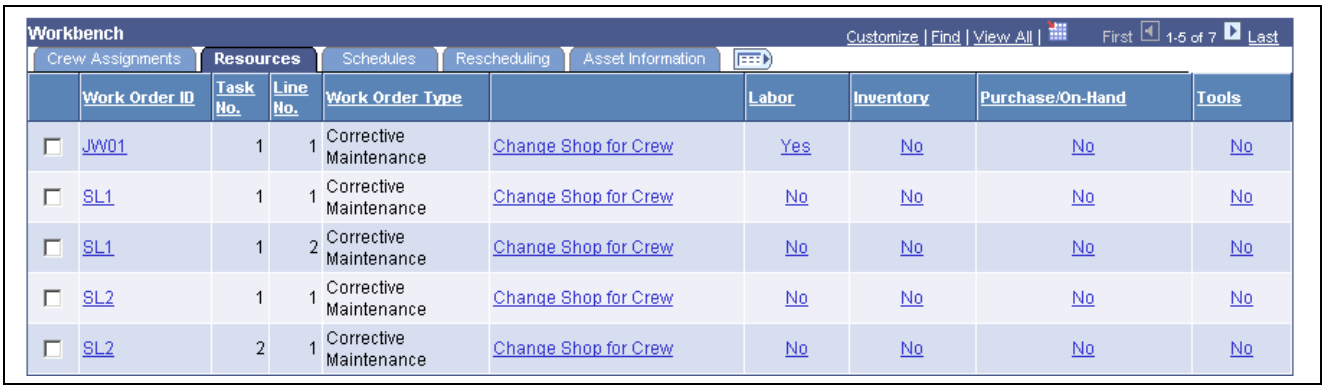
This value applies to a labor requirement row when the metrics in the crew capacity plan are updated for this row upon selecting the Confirm Metrics action.

See Chapter 19, "Performing Crew Scheduling," Understanding Crew Scheduling, page 539.

Defining the Crew Scheduling Workbench Resources Tab

Access the Crew Scheduling Workbench page - Resources tab.



	Work Order ID	Task No.	Line No.	Work Order Type		Labor	Inventory	Purchase/On-Hand	Tools
☐	JW01	1	1	Corrective Maintenance	Change Shop for Crew	Yes	No	No	No
☐	SL1	1	1	Corrective Maintenance	Change Shop for Crew	No	No	No	No
☐	SL1	1	2	Corrective Maintenance	Change Shop for Crew	No	No	No	No
☐	SL2	1	1	Corrective Maintenance	Change Shop for Crew	No	No	No	No
☐	SL2	2	1	Corrective Maintenance	Change Shop for Crew	No	No	No	No

Crew Scheduling Workbench page - Resources tab

Change Shop for Crew Click this link to access a secondary page to change the shop associated with the selected crew to another shop to which the crew is assigned.

Important! If you change the shop for the crew at the task level, the cost and bill rates for these rows are still determined by the shop specified in the header of the work order.

Labor Displays a *Yes* or *No* for each row, which indicates whether or not labor resources have been scheduled for the selected work order task row. . Clicking the link (Yes or No) takes you to the Schedules page and the Labor Schedules grid in the work order.

Inventory Displays a *Yes* or *No* for each row, which indicates whether or not inventory parts have been scheduled for the selected work order task row. Clicking the link (Yes or No) takes you to the Schedules page and the Inventory Schedules grid in the work order.

Note. This field does not display if PeopleSoft Inventory is not installed.

Purchase/On-Hand Displays a *Yes* or *No* for each row, which indicates whether or not noninventory and open description labor, material, and tools have been scheduled to be purchased or are on hand on the selected work order task row. Clicking the link (Yes or No) takes you to the Schedules page and the Purchase/On-Hand Schedules grid in the work order.

Tools Displays a *Yes* or *No* for each row, which indicates whether or not tool resources have been scheduled for the selected work order task row. Clicking the link (Yes or No) takes you to the Schedules page and the Tool Schedules grid in the work order.

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Defining the Crew Scheduling Workbench Schedules Tab

Access the Crew Scheduling Workbench page - Schedules tab.

	Work Order ID	Task No.	Line No.	Required Start	Start Time	Required End	End Time	Crew Start	Start Time	Crew End	End Time	Completed
☐	0000000001	1	1	06/09/2005	8:00AM	06/09/2005	5:00PM					
☐	0000000001	2	1	06/09/2005	8:00AM	06/09/2005	5:00PM					
☐	0000000004	1	1	10/10/2005	8:00AM	10/10/2005	5:00PM					
☐	0000000004	2	1	10/10/2005	8:00AM	10/10/2005	5:00PM					
☐	0000000004	3	1	10/10/2005	8:00AM	10/10/2005	5:00PM					

Crew Scheduling Workbench page - Schedules tab

The required start and end dates and times that display for each craft are defined in the work order task labor requirements and are displayed only on this grid.

Crew Start

When you assign a crew to a row, this field displays the start date of the period. You can change the data in this field by selecting the action *Change Crew Start Date and Time* or by changing the value in one row.

Important! If you change this date on a single row to a date outside the Schedule dates in the work order task, the system validates the change based on whether the Override Task Schedule Dates check box was selected. When you select the Change Crew Start Date and Time action, you can select the check box, which enables you to override the task scheduled dates. However, the check box is not available if you change the dates for a single row. If you change the Crew Start date field directly on the Workbench for a single row, then the system validates the field value based on the whether the Override Tasks Schedule Dates was selected or not the last time the Override Task Schedule Dates option was applied to selected rows on the workbench. If the check box was selected, then the system issues a warning that the scheduled dates on the task may change. If the check box was not selected, the system issues an error indicating that the change in the Crew Start and End Dates for the row are outside of the range of the scheduled dates for the task.

Start Time

When you assign a crew to a row, this field displays the crew's shift start time for the corresponding day of the week in which the crew start date falls. You can change the data in this field by selecting the action *Change Crew Start Date and Time*

Crew End

When you assign a crew to a row, this field displays the start date of the period plus the difference between the required start and end dates. You can change the data in this field by selecting the action *Change Crew End Date and Time* Refer to the note under Crew Start Date when changing the date for a single row outside of the task Schedule date.

End Time

When you assign a crew to a row, this field displays the crew's shift end time for the corresponding day of the week in which the crew end date falls. You can change the data in this field by selecting the action *Change Crew End Date and Time*

Completed

Displays the date that the crew completed the task. This field is automatically updated if the work order task status is changed to Complete. You can select

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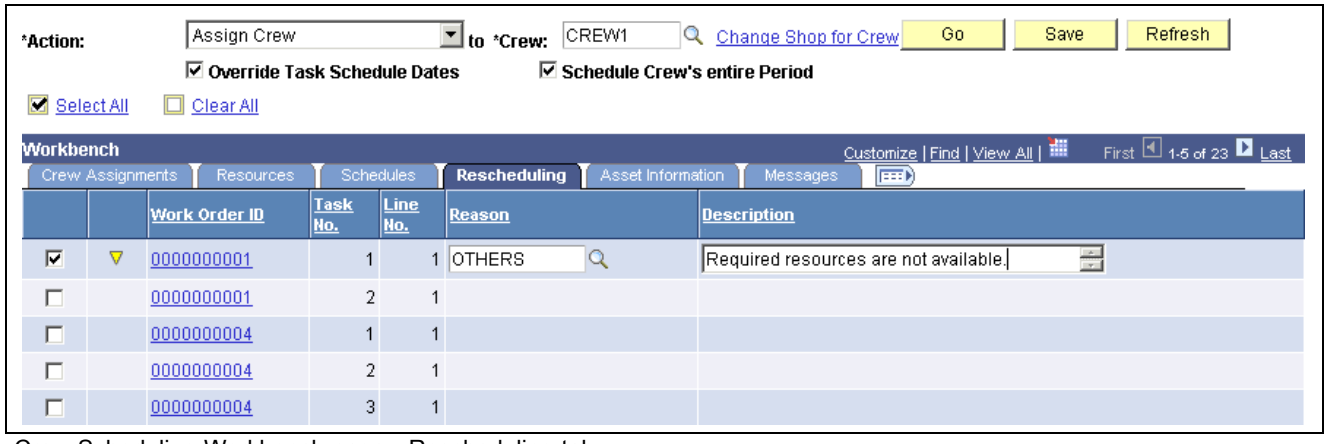
the action *Report Complete Date* to update this field or update a single row. The available fields in the row on each grid become unavailable except for this field. Carryover hours are set to zero.

Defining the Crew Scheduling Workbench Rescheduling Tab

Access the Crew Scheduling Workbench page - Rescheduling tab.



Crew Scheduling Workbench page - Rescheduling tab

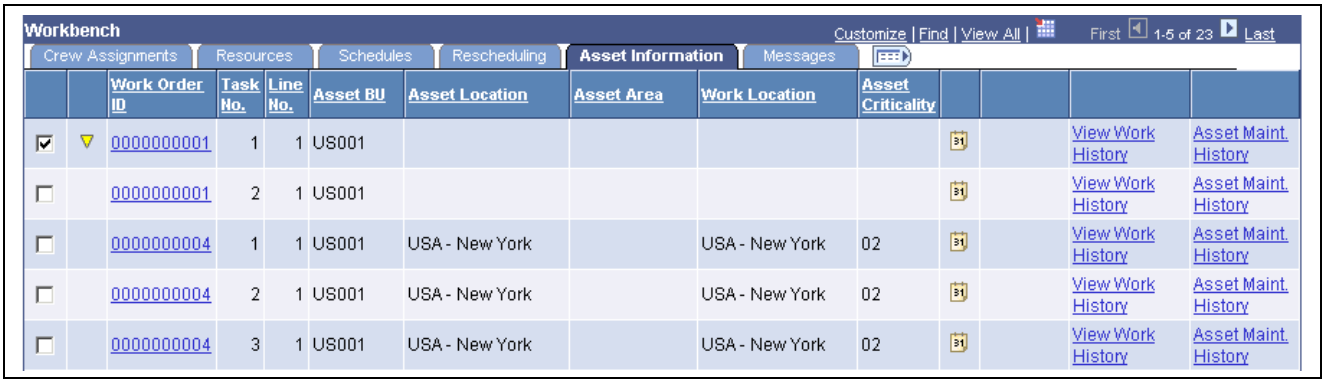
Reason You can enter a reason for rescheduling a crew assignment in this field. This field is only used if you reschedule a row and need to move the date into the Rescheduling History.

Note. You set up reason codes in Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Crew Rescheduling Reason Codes.

Description Displays the description associated with the selected reason.

Defining the Crew Scheduling Workbench Asset Information Tab

Access the Crew Scheduling Workbench page - Asset Information tab.



Crew Scheduling Workbench page - Asset Information tab

This tab displays the asset information entered for the work order task.

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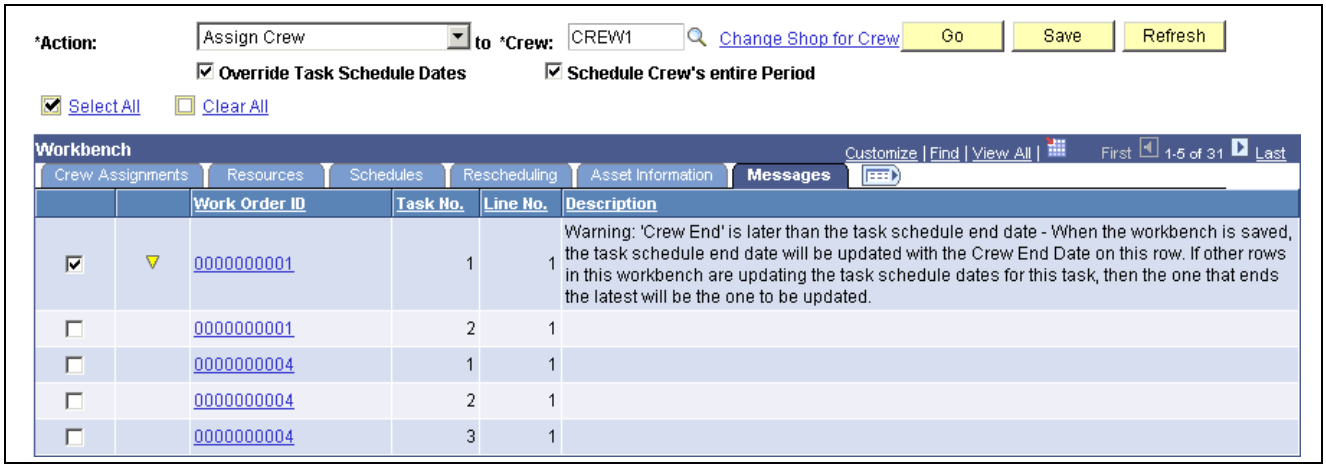
	Click the Calendar icon to display the Asset Monthly Schedule page, which displays dates and times that the asset may not be available for scheduling or enables you to add dates and times that the asset is unavailable.
View Work History	Click this link to display the Work Order History page for the asset. The asset's work order history identifies the work order, task and task description, task status, required start and end dates, completed date, and close date for the task as they become available.
Asset Maintenance History	Click this link to display the Asset Service/Repair History search page of the Review Maintenance History component in PeopleSoft Asset Management. If the asset has a maintenance history, the Maintenance History by Type page displays the description, date and time, and responsible party for the maintenance on the Maintenance tab, the material, labor, and other costs on the Cost tab, and the task description, work order ID, work order business unit, and task number on the Work Order tab.

Defining the Crew Scheduling Workbench Messages Tab

Access the Crew Scheduling Workbench page - Messages tab.



Crew Scheduling Workbench page - Messages tab

The Messages tab is visible when you execute an action and one of the selected rows issues a message as a result of the action, or when you modify a field on a row. The system displays an error, warning, or information message icon on the selected row that has a message and the message is described on the Message tab.

	Displays a Warning icon if there is a warning message on the Messages page. If at least one of the messages is a warning and none of the rows has an error message, then the action will take place.
	Displays an Error icon if there is an error message on the Messages page. If at least one of the messages is an error, then the action will not take place.
	Displays an Information icon if there is an informational message on the Messages page. If the messages are informational and there are no error messages, then the action will take place.

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Using the Labor Assignment Workbench

This section provides and overview of the Labor Assignment Workbench and discusses how to:

- Use the Labor Assignment Workbench Search page.
- Determine employee availability.
- Perform assignment and non-assignment actions on multiple labor schedule rows.
- Define the Assignments tab of the Labor Assignment Workbench.
- Define the Schedules tab of the Labor Assignment Workbench.
- Define the Asset Information tab of the Labor Assignment Workbench.
- Define the Distributions tab of the Labor Assignment Workbench.
- Define the Messages tab of the Labor Assignment Workbench.

Understanding the Labor Assignment Workbench

The Labor Assignment Workbench is typically used to assign technicians to tasks that have been previously scheduled to crews using the Crew Scheduling Workbench. The workbench enables you to view the availability and load of each crew member for each day of the schedule period and allocate the workload appropriately to multiple work orders and their associated tasks at one time. As you assign crew members to tasks, the Availability tab is automatically updated with these changes. In addition, you are not limited to assigning crew members to work order tasks. You can also assign technicians to non-crew related work orders, as well as assign a technician who is not assigned to a crew to a crew scheduled work order. When you save the assignments on the workbench, the system updates the labor schedule rows in the work order and updates each technician's resource calendar with the new assignments.

You are not required to use the Labor Assignment Workbench to assign technicians associated with a crew to tasks. You can also make these assignments by accessing a single work order using the Work Order component. However, the Labor Assignment Workbench streamlines the scheduling process and enables you to maximize resource utilization.

To use the Labor Assignment Workbench for non-crew scheduled work orders, labor schedules must first be created for each work order.

The Labor Assignment Workbench consists of:

- A search page, which enables you to search for work order labor schedules within a schedule period.
- A resource availability tab, which shows the availability and load of each crew member (crew scheduled) or shop resource (non-crew scheduled) for each day of the schedule period.
- The workbench, which lists the work order labor schedule lines requiring technician assignments.

  You can perform mass updates to the workbench grid by applying various actions to selected rows or you can update this grid manually the same way you update the Labor Schedules grids in the work order.

The Availability tab takes into account the employee's shift and availability and considers the schedule dates and total available hours each day based on the resource's calendar. Refreshing the tab after making changes to the labor schedule assignments updates each employee's displayed availability but does not adjust the start and end dates and times on the labor schedules. Saving the page updates each affected Resource Schedule with the assignments and adjusts the start and end dates and times as needed. Making assignments on this workbench follows the same rules and performs the same updates to the system as does making the assignments in the work order component.

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The following examples show how the Availability tab changes as assignments are made. Each example is for the employee John Clark, who:

- Works Monday through Friday.
- Has a shift from 8 a.m. to 12 p.m. and from 1 p.m. to 5 p.m.

Labor Assignment Example1

Based on the initial display of the Availability tab, which indicates the number of hours that have not been assigned to John Clark, he initially is free every day from 1/2 - 1/6.

John's supervisor assigns him to Task /Line #: WO002/1 scheduled from 1/2/06 10:00AM to 1/3/06 5:00PM with a duration of 10 hrs.

The system creates the following entries on his calendar:

- 1/2/06 10:00 a.m. to 12:00 p.m. (2 hrs)
- 1/2/06 01:00 p.m. to 05:00 p.m. (4 hrs)
- 1/3/06 08:00 a.m. to 12:00 p.m. (4 hrs)

Refreshing the Availability tab based on this assignment:

Action	Employee	Base Capacity	Assigned	Load%	1/2/06	1/3/06	1/4/06	1/5/06	1/6/06
Initial Display	John Clark	40.00	0.00	0	8.00	8.00	8.00	8.00	8.00
After Assignment	John Clark	40.00	10.00	25	2.00	4.00	8.00	8.00	8.00

Labor Assignment Example 2

Assumption: John Clark is already assigned a task on 1/3/06 from 10:00 a.m. to 12:00 p.m. with the rest of the days free in the week.

John's supervisor attempts to assign him to Task /Line #: WO002/1 scheduled from 1/2/06 10:00AM to 1/3/06 5:00PM with a duration of 10 hrs.

However, the system issues an error message because 2 hours in the a.m. on 1/3/06 are already assigned. To correct this problem, the supervisor selects the Overbooking check box, which enables the assignment of the additional two hours.

The system creates the following entries on his calendar:

- 1/2/06 10:00 a.m. to 12:00 p.m. (2 hrs)
- 1/2/06 01:00 p.m. to 05:00 p.m. (4 hrs)
- 1/3/06 08:00 a.m. to 12:00 p.m. (4 hrs)

Refreshing the Availability grid based on this assignment:

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Action	Employee	Base Capacity	Assigned	Load%	1/2/06	1/3/06	1/4/06	1/5/06	1/6/06
Initial Display	John Clark	40.00	2.00	5	8.00	6.00	8.00	8.00	8.00
After Assignment	John Clark	40.00	12.00	30	2.00	2.00	8.00	8.00	8.00

Labor Assignment Example 3

John Clark's supervisor attempts to assign him to these five tasks starting on the same day:

- Task/Line # WO002/1: scheduled from 1/2/06 8:00 a.m. to 1/3/06 5:00 p.m., duration 10 hours.
- Task/Line # WO002/2: scheduled from 1/2/06 8:00 a.m. to 1/3/06 5:00 p.m., duration 12 hours.
- Task/Line # WO002/3: scheduled from 1/2/06 8:00 a.m. to 1/3/06 5:00 p.m., duration 8 hours.
- Task/Line # WO002/4: scheduled from 1/2/06 8:00 a.m. to 1/3/06 5:00 p.m., duration 8 hours.
- Task/Line # WO002/5: scheduled from 1/2/06 8:00 a.m. to 1/3/06 5:00 p.m., duration 8 hours.

The supervisor receives an error message that John has a scheduling conflict. To correct this problem, the supervisor selects the Overbooking check box, which enables John Clark's assignment to the work order task with these entries on his calendar.

- Task/Line # WO002/1
  - 1/2/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/2/06 1:00 p.m. to 5:00 p.m. (4 hours)
  - 1/3/06 8:00 a.m. to 10:00 a.m. (2 hours)
- Task/Line # WO002/2
  - 1/2/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/2/06 1:00 p.m. to 5:00 p.m. (4 hours)
  - 1/3/06 8:00 a.m. to 12:00 a.m. (4 hours)
- Task/Line # WO002/3
  - 1/2/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/2/06 1:00 p.m. to 5:00 p.m. (4 hours)
- Task/Line # WO002/4
  - 1/2/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/2/06 1:00 p.m. to 5:00 p.m. (4 hours)
- Task/Line # WO002/5
  - 1/2/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/2/06 1:00 p.m. to 5:00 p.m. (4 hours)

Important! The Availability grid, like the PeopleSoft Resource Management calendar, allows overbooking up to the shift total (8 hours) each day for each task. There is no limit on the total number of overbooked hours for all tasks each day.

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Refreshing the Availability grid based on this assignment:

Action	Employee	Base Capacity	Assigned	Load%	1/2/06	1/3/06	1/4/06	1/5/06	1/6/06
Initial Display	John Clark	40.00	0.00	0	8.00	8.00	8.00	8.00	8.00
After Assignment	John Clark	40.00	46.00	115	-32.00	2.00	8.00	8.00	8.00

Note. Typically, a supervisor will not allow this much overbooking on one day. This scenario serves as an example of how a supervisor can move past the error by enabling overbooking. A supervisor may choose instead to adjust the assignments to encompass the entire period.

Labor Assignment Example 4

John Clark is assigned two tasks spanning the entire period of one week.

- Task/Line # WO002/1: scheduled from 1/2/06 8:00 a.m. to 1/6/06 5:00 p.m., duration 10 hours.
- Task/Line # WO002/2: scheduled from 1/2/06 8:00 a.m. to 1/6/06 5:00 p.m. , duration 12 hours.

If the scheduler does not select the Overbooking flag, John Clark will be assigned to the tasks with the these entries on his calendar:

- Task/Line # WO002/1
  - 1/2/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/2/06 1:00 p.m. to 5:00 p.m. (4 hours)
  - 1/3/06 8:00 a.m. to 10:00 a.m. (2 hours)
- Task/Line # WO002/2
  - 1/3/06 10:00 a.m. to 12:00 p.m. (2 hours)
  - 1/3/06 1:00 p.m. to 5:00 p.m. (4 hours)
  - 1/4/06 8:00 a.m. to 12:00 p.m. (4 hours)
  - 1/4/06 1:00 p.m. to 3:00 p.m. (2 hours)

Refreshing the Availability grid based on this assignment:

Action	Employee	Base Capacity	Assigned	Load%	1/2/06	1/3/06	1/4/06	1/5/06	1/6/06
Initial Display	John Clark	40.00	0.00	0	8.00	8.00	8.00	8.00	8.00
After Assignment	John Clark	40.00	22.00	55	0.00	0.00	2.00	8.00	8.00

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Pages Used by the Labor Assignment Workbench

Page Name	Object Name	Navigation	Usage
Labor Assignment Workbench Search	WM_LABOR_SRCH_SEC	Maintenance Management, Workbenches, Labor Assignment Workbench, Labor Assignment Workbench Search	Search for crew and non-crew schedules in which to assign labor.
Labor Assignment Workbench	WM_LABOR_ASSIGN_WB	Maintenance Management, Workbenches, Labor Assignment Workbench, Labor Assignment Workbench	Review crew member and non-crew member availability in order to make labor assignments to schedule rows.
Monthly Schedule	RS_SCHED_MONTH	Click the Calendar icon on the Labor Assignment Workbench Availability grid.	Review and modify the task details in an employee's monthly and daily schedule.
Task Details page	RS_SCHED_APPT	Click a date on the Monthly Schedule page.	Add or modify the task details for an employee.
Daily Schedule	RS_SCHED_DAILY	Click the Return to Daily Schedule link on the Task Details page.	Review any assignments for a specific date entered in the Task Details page.
Work Order	WM_WO_HDR	Click the work order ID link on the Assignments tab of the Labor Assignment Workbench.	Review, modify, and update the work order.
Work Order Task Descriptions	WM_WO_LA_TSK_SEC	Click the task description link on the Assignments tab of the Labor Assignment Workbench.	Review description of work order task.
Labor Distributions	WM_LBAW_DIST_SEC	Click the Distributions link on the Distributions tab of the Labor Assignment Workbench.	Review and update the labor ChartField distribution.

Using the Labor Assignment Workbench Search Page

Access the Labor Assignment Workbench Search page.

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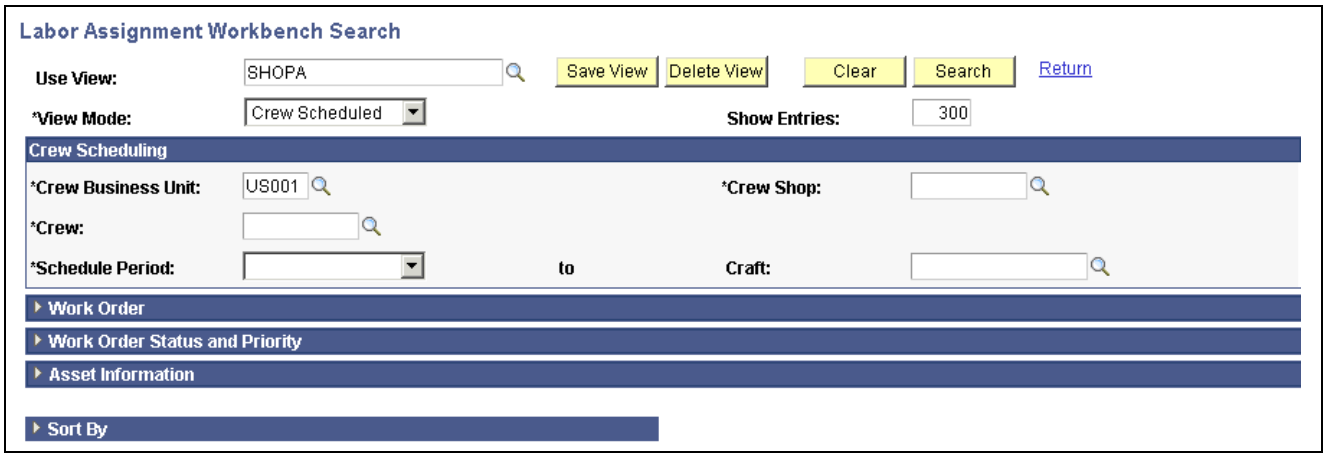

Labor Assignment Workbench Search page

The Labor Assignment Workbench Search page is very similar to the Crew Scheduling Workbench search page.

Use View Select an existing saved view as your search criteria.

Save View Click this button if you change the criteria in a view or create a view of new search criteria. If you modified an existing view, the system asks if you want to override the view. If this is a new view, the system saves the view with the new name you enter in the Use View field.

Delete View Click this button to delete the current view. The system asks if you are sure that you want to delete the view.

Clear Click this button to clear all the field values in a view.

Search Click this button after entering any required or additional search criteria. The system searches for and displays the availability for the selected crew and period and displays any work orders in the workbench grids that are either assigned or can be assigned based on the criteria.

Return Click this link to return to the workbench.

View Mode Select either:

- *Crew Scheduled.*

  This value is used to find work orders that have been scheduled to a crew. Selecting this value displays the Crew Scheduling, Work Order, Work Order Status and Priority, Asset Information, and Sort By group boxes. In the Crew Scheduling group box, you must enter the:

  - Crew business unit, which value defaults from the business unit on the User Preferences-Maintenance Management page.
  - Crew shop.
  - Crew.
  - Schedule period.

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The Craft field is not required. You can use it to narrow your search. When you click the Search button after defining this Crew Scheduled search criteria, initially the resources on the Availability grid are restricted to the resources for the crew selected on the search page. You can subsequently blank out the crew in the Availability grid and click the Go button to display all of the resources in the shop.

- *Non-Crew Scheduled.*

  This value is used to find work orders that have not been scheduled to a crew. Selecting this value displays only the Work Order, Work Order Status and Priority, Asset Information, and Sort By group boxes. This search criteria is described for the Labor Assignment Workbench. You must enter in the Work Order group box, the:

  - Business unit (work order).
  - Shop.

When you click the Search button after defining this non-crew scheduled search criteria, all of the resources assigned to the shop are listed on the Availability grid and any work order labor schedule lines that fall within the selected search criteria.

See Chapter 19, "Performing Crew Scheduling," Using the Crew Schedule Search Page, page 554.

Sort By

Select one of the following field names and select whether you want to sort the field values in the Labor Assignment Workbench in either *Ascending* or *Descending* order:

- *Asset Area.*
- *Asset Criticality.*
- *Asset Description.*
- *Asset Location.*
- *Craft.*
- *Employee ID.*
- *Resource Line Number.*
- *Scheduled End Date.*
- *Scheduled End Time.*
- *Scheduled Start Date.*
- *Scheduled Start Time.*
- *Task Description.*
- *Task Number.*
- *Task Status.*
- *Work Order ID.*

Determining Employee Availability

Access the Availability grid in the Labor Assignment Workbench page.

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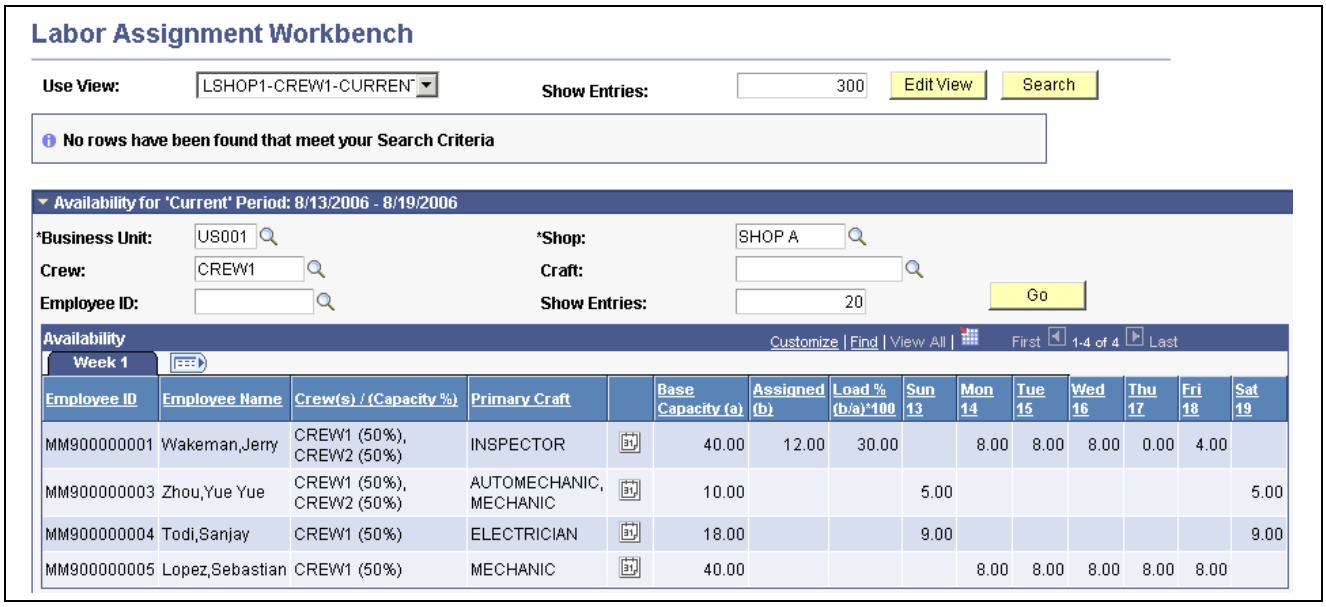

Labor Assignment Workbench - Availability grid

Business Unit Select a business unit to override the default business unit.

The default business unit is derived from the Labor Assignment Workbench Search criteria.

Shop Select a shop to override, if necessary, the default shop.

The default shop is derived from the Crew Scheduled Labor Assignment Workbench Search criteria if the Crew Scheduled View Mode is selected.

Or, the default shop is derived from the Non-Crew Scheduled Labor Assignment Workbench Search criteria if the Non-Crew Scheduled View Mode is selected.

Crew Select a crew to override, if necessary, the default crew value, which is derived from the Crew Scheduled Labor Assignment Workbench search criteria. Initially only the resources in the crew display on this page. However, you can blank out the crew ID in this field and click the Go button to list all resources in the shop.

Note. If the search criteria is *Non-Crew Scheduled*, this field does not appear on the page.

Craft Enter a craft or select a craft to override, if necessary, the default craft value, which is derived from either the *Crew Scheduled* or *Non-Crew Scheduled* Labor Assignment Workbench Search criteria. When you click the Go button, the system displays only the employees assigned to the selected shop for that craft.

This field is optional.

Employee ID Select a specific employee to check the availability of just one person. You can select any employee as long as the employee is assigned to a shop.

Go Click this button to refresh the Availability grid with any changes to the search fields listed above. For this feature the business unit and shop are the only

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required search fields. This button allows you to change the resource search criteria to either refine the list of resources within the shop and crew selected for scheduling or view resource availability in other shops and crews.

Availability Grid

The number of tabs depends on the number of days in the period, which are divided into weeks. You can see from one to five weekly tabs depending on the scheduling period. The metrics in this grid show the availability and load of each crew member for each day of the schedule period. Assigning employees to selected rows in the workbench or changing the schedule dates or hours on those rows automatically refreshes the Availability grid.

Click the Calendar icon to access the monthly schedule for the employee. You click a date to access the Task Details page and add a new assignment, such as a meeting. You can access the daily schedule from the Task Details page.

Base Capacity (a) Displays the total available hours for the schedule period prior to making assignments. Base capacity is equal to the standard working hours minus appointments such as vacations, holidays, and meetings.

Assigned (b) Displays the total hours that this resource is assigned for this schedule period. Data is retrieved from the resource's calendar table.

Load % (b/a) * 100 Displays the percentage value equal to the assigned hours divided by the base capacity hours.

Mon (date), Tue (date), Wed (date), Thu (date), Fri (date), Sat (date), and **Sun (date)** Displays the number of remaining hours in which the employee is available each day. Remaining hours are equal to the available hours for the day minus the hours assigned for that day. If the day is overbooked, the hours will display negative values in red. Days when the employee doesn't work (for example, weekends and holidays) will display blanks. Days that are fully booked but not overbooked display 0.

Performing Assignment Actions on Multiple Task Rows

Access the Labor Assignment Workbench page.

Action Select the labor schedule rows to which you want to apply this action and select:

- *Assign Resource.*

  Selecting this action displays a to Employee ID field.

  Select an employee ID to assign to the selected rows. This action updates the Employee ID field on the Assignments tab of the Workbench for each selected row.

- *Cancel Assignment*

  Selecting this action cancels previously saved assignments to selected rows. It also blanks out unsaved assignments to selected rows.

- *Change Schedule End Dt/Tm* (Date/Time)

  Selecting this action displays a to (Date) field and (Time) field.

  Select the date and time to update the Scheduled End Date and End Time fields for each selected row on the Schedules tab of the Workbench.

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- *Change Schedule StartDt/Tm* (Date/Time)

  Selecting this action displays a to (Date) field and (Time) field.

  Select the date and time to update the Scheduled Start Date and Start Time fields for each selected row on the Schedules tab of the Workbench.

- *Change Status.*

  Selecting this action displays a field in which you can select a user-defined task status that is set up to match an internal task status. When you select a task status from the list to change the task status for selected rows, the system verifies whether the change is valid.

  - Open
  - Awaiting Schedule
  - Hold
  - Scheduled
  - Work in Progress
  - Canceled
  - Complete
  - Closed

  You can notify the scheduler using the Change Status page of the status change.

  Important! Selecting a task status displays the Change Status page for the selected rows. If you selected multiple rows for the same task, only one row representing all of these rows display on the Change Status page. When you change the status of this row, the system changes the status of all of the rows associated with the task, whether you selected them or not. When you select OK, you are returned to the Labor Assignment Workbench.

Go Click this button to apply the action to the selected rows.

Note. The Availability grid is updated depending on the action you perform. If you enter data outside the date range of the Availability grid, the grid does not show the change. If you change the schedule date or hours for which an assignment has not been made, the grid does not show the change.

Save Click this button to save the Labor Assignments Workbench page, which updates the Labor Schedules rows in the work order. It also updates the resource calendar with the new assignments.

Refresh Click this button to refresh changes made in the Assignments grid and update the Availability grid. This causes deferred processing on field changes to proceed.

Defining the Assignments Tab of the Labor Assignment Workbench

Access the Labor Assignment Workbench page, and select the Assignments tab.

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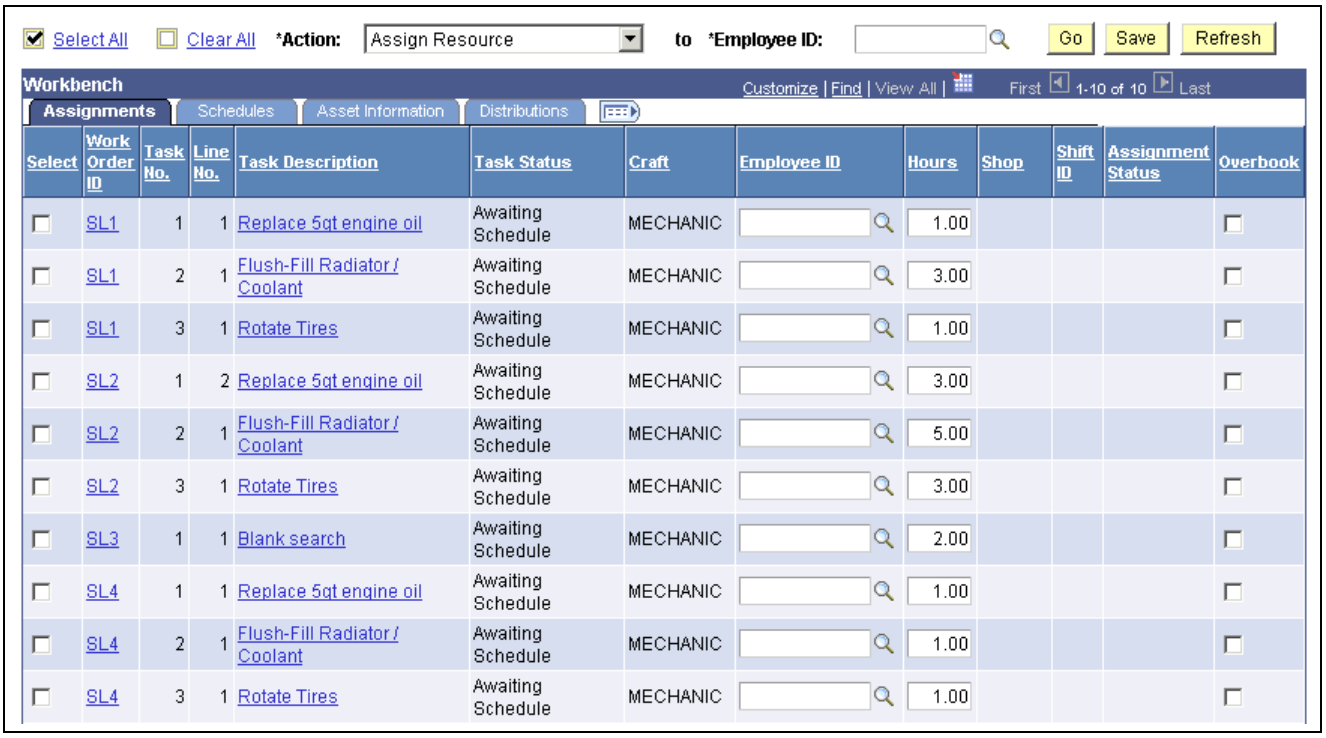

Select	Work Order ID	Task No.	Line No.	Task Description	Task Status	Craft	Employee ID	Hours	Shop	Shift ID	Assignment Status	Overbook
	SL1	1	1	Replace 5qt engine oil	Awaiting Schedule	MECHANIC		1.00				
	SL1	2	1	Flush-Fill Radiator / Coolant	Awaiting Schedule	MECHANIC		3.00				
	SL1	3	1	Rotate Tires	Awaiting Schedule	MECHANIC		1.00				
	SL2	1	2	Replace 5qt engine oil	Awaiting Schedule	MECHANIC		3.00				
	SL2	2	1	Flush-Fill Radiator / Coolant	Awaiting Schedule	MECHANIC		5.00				
	SL2	3	1	Rotate Tires	Awaiting Schedule	MECHANIC		3.00				
	SL3	1	1	Blank search	Awaiting Schedule	MECHANIC		2.00				
	SL4	1	1	Replace 5qt engine oil	Awaiting Schedule	MECHANIC		1.00				
	SL4	2	1	Flush-Fill Radiator / Coolant	Awaiting Schedule	MECHANIC		1.00				
	SL4	3	1	Rotate Tires	Awaiting Schedule	MECHANIC		1.00				

Labor Assignment Workbench - Assignments tab

Task No.(task number) Identifies the task number associated with the work order ID to which an employee is being assigned.

Line No.(line number) Identifies the line (row) number of the labor schedule in the work order to which an employee is being assigned.

Task Status Displays the current work order task status. This field is updated if you select the *Change Status* action for one or more selected rows.

Craft Displays the craft associated with the labor schedules for this task line in the work order.

Employee ID Select the employee (resource) that you want to assign to this single row or select one or more rows and select the *Assign Resource* action and an employee ID to update the selected rows.

Note. The employee must be set up as a resource in a shop.

Hours Change the hours that the selected employee will work on this task from the default hours, which are derived from the labor requirements and labor schedules in the work order.

Shop Displays the shop associated with the employee, when you select an employee ID.

Shift Displays the shift associated with the employee in the shop, when you select an employee ID.

Overbook Select this check box to enable manual overbooking of the labor schedule row. This field is controlled by the Overbooking Resources group box on the Shop Definition page. If the Require Manual Override field check box in the shop

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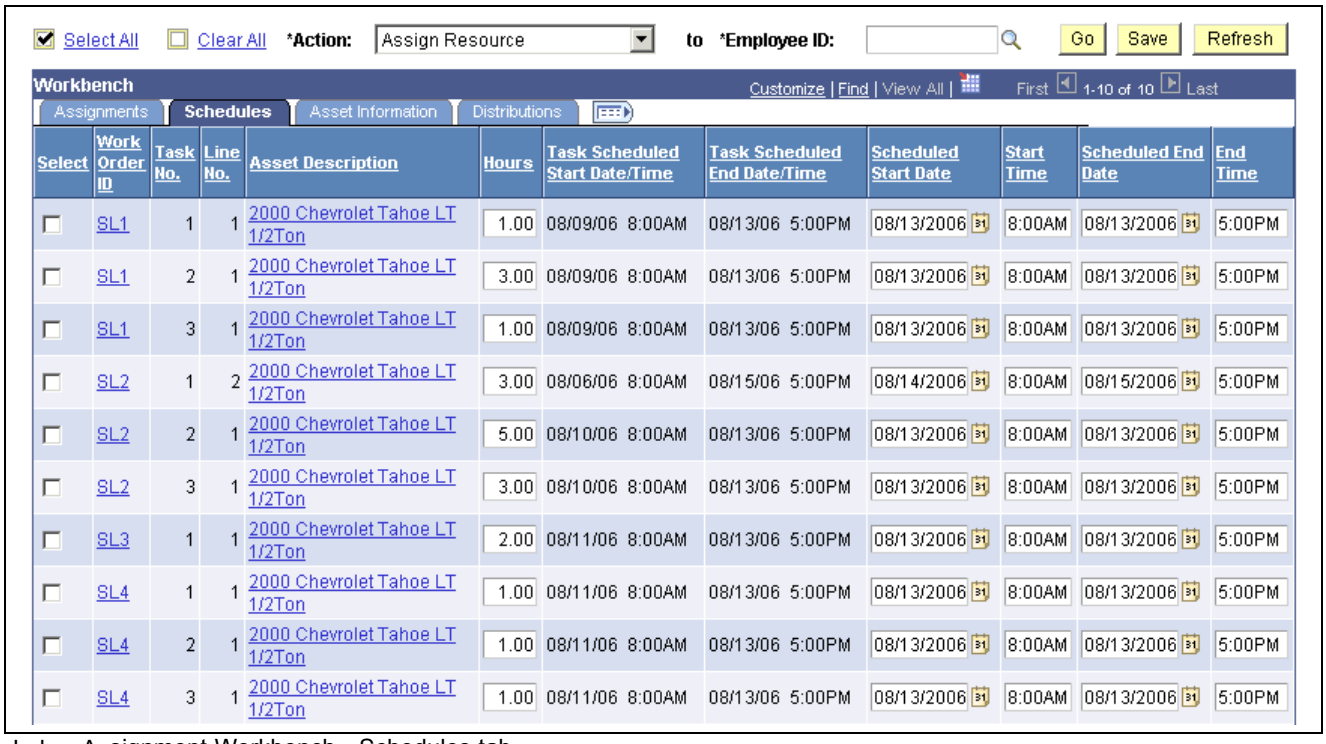
is not selected, this field is not available for selection on this Workbench - Assignment grid and overbooking is always allowed. If the Require Manual Override field is selected, this check box becomes available for selection on this Workbench - Assignment grid and overbooking is controlled by the user.

Important! If you see an informational, warning, or error message icon on one or more of the selected rows, a Message tab displays, which you can select and read the message associated with the icon. This is identical to the way the Message tab works in the Crew Scheduling Workbench.

See Chapter 19, "Performing Crew Scheduling," Understanding Crew Scheduling, page 539.

Defining the Schedules Tab of the Labor Assignment Workbench

Access the Labor Assignment Workbench page, and select the Schedules tab.



Select All | Clear All | *Action: Assign Resource | to *Employee ID: | Go | Save | Refresh

Workbench — Customize | Find | View All | First 1-10 of 10 Last

Assignments | Schedules | Asset Information | Distributions

Select	Work Order ID	Task No.	Line No.	Asset Description	Hours	Task Scheduled Start Date/Time	Task Scheduled End Date/Time	Scheduled Start Date	Start Time	Scheduled End Date	End Time
☐	SL1	1	1	2000 Chevrolet Tahoe LT 1/2Ton	1.00	08/09/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL1	2	1	2000 Chevrolet Tahoe LT 1/2Ton	3.00	08/09/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL1	3	1	2000 Chevrolet Tahoe LT 1/2Ton	1.00	08/09/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL2	1	2	2000 Chevrolet Tahoe LT 1/2Ton	3.00	08/06/06 8:00AM	08/15/06 5:00PM	08/14/2006	8:00AM	08/15/2006	5:00PM
☐	SL2	2	1	2000 Chevrolet Tahoe LT 1/2Ton	5.00	08/10/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL2	3	1	2000 Chevrolet Tahoe LT 1/2Ton	3.00	08/10/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL3	1	1	2000 Chevrolet Tahoe LT 1/2Ton	2.00	08/11/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL4	1	1	2000 Chevrolet Tahoe LT 1/2Ton	1.00	08/11/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL4	2	1	2000 Chevrolet Tahoe LT 1/2Ton	1.00	08/11/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM
☐	SL4	3	1	2000 Chevrolet Tahoe LT 1/2Ton	1.00	08/11/06 8:00AM	08/13/06 5:00PM	08/13/2006	8:00AM	08/13/2006	5:00PM

Labor Assignment Workbench - Schedules tab

Asset Description Click this link to access the Asset Information page, which describes the characteristics (type, subtype, manufacturer ID, model) of the asset selected for the work order task, including the AM business unit, asset ID, serial number, tag number, asset criticality, and if the asset is a component of another asset.

Task Scheduled Start Date/Time Displays the date and time the task was scheduled to start on the work order.

Task Scheduled End Date/Time Displays the date and time the task was scheduled to end on the work order.

Scheduled Start Select a new start date for a row. You can also select one or more rows and select the *Change Scheduled Start Dt/Tm* action to update this field and the Start Time field.

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Start Time Enter a new start time for a row. Selecting the *Change Scheduled Start Dt/Tm* action also updates one or more selected rows.

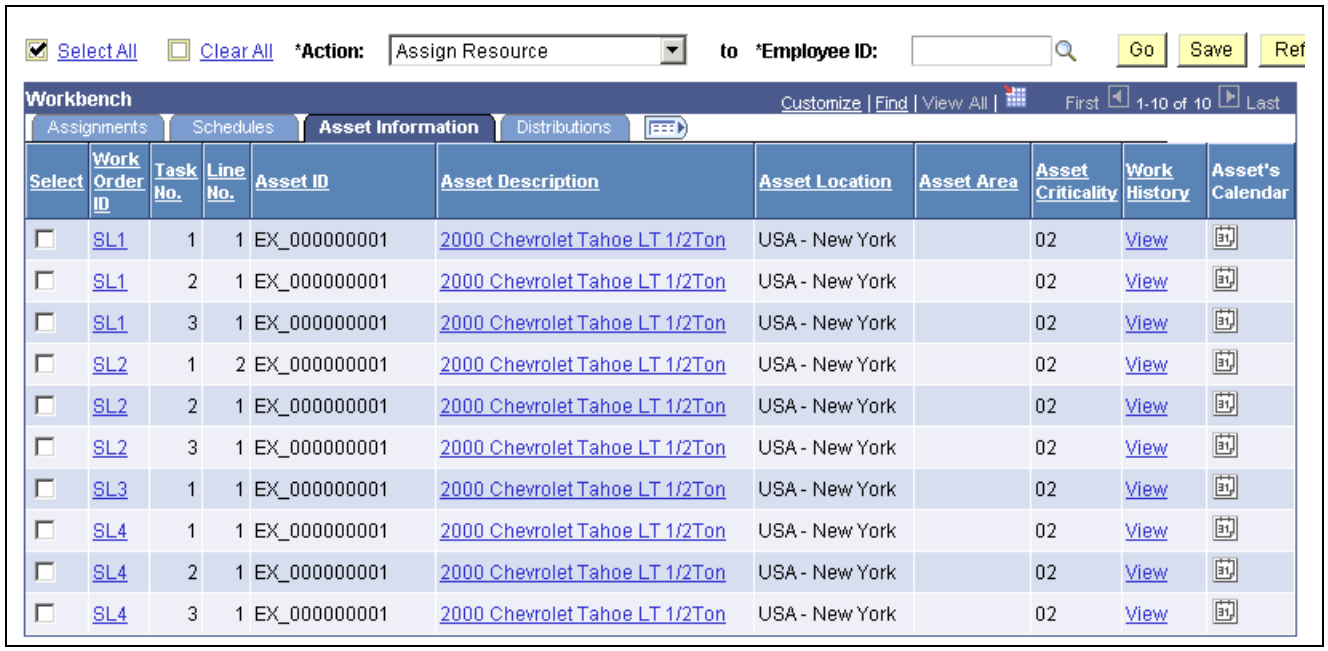
Scheduled End Select a new end date for a row. You can also select one or more rows and select the *Change Scheduled End Dt/Tm* action to update this field and the End Time field.

End Time Enter a new end time for a row. Selecting the *Change Scheduled End Dt/Tm* action also updates one or more selected rows.

Note. If the labor schedules are associated with a crew, the default values that display in these fields are derived from the crew scheduled start and end dates and times. If the labor schedules are associated with a non-crew scheduled work order, the default values are derived from the task scheduled start and end dates and times in the work order.

Defining the Asset Information Tab of the Labor Assignment Workbench

Access the Labor Assignment Schedule page, and select the Asset Information tab.



Select	Work Order ID	Task No.	Line No.	Asset ID	Asset Description	Asset Location	Asset Area	Asset Criticality	Work History	Asset's Calendar
☐	SL1	1	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL1	2	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL1	3	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL2	1	2	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL2	2	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL2	3	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL3	1	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL4	1	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL4	2	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	
☐	SL4	3	1	EX_000000001	2000 Chevrolet Tahoe LT 1/2Ton	USA - New York		02	View	

Labor Assignment Workbench - Asset Information tab

Asset Location Displays the location of the asset associated with the task.

Asset Area Displays the asset area of the asset associated with the task.

Asset Criticality Displays the level of criticality of the asset associated with the task.

Warranty Click on this link to access the Asset Warranties page if the asset associated with the task has any warranties. You can add warranties and use this information to create warranty claims for this asset based on this task by accessing Maintenance Management, Warranty Claim, Generate Claim.

See Chapter 16, "Managing Warranty Claims," page 415.

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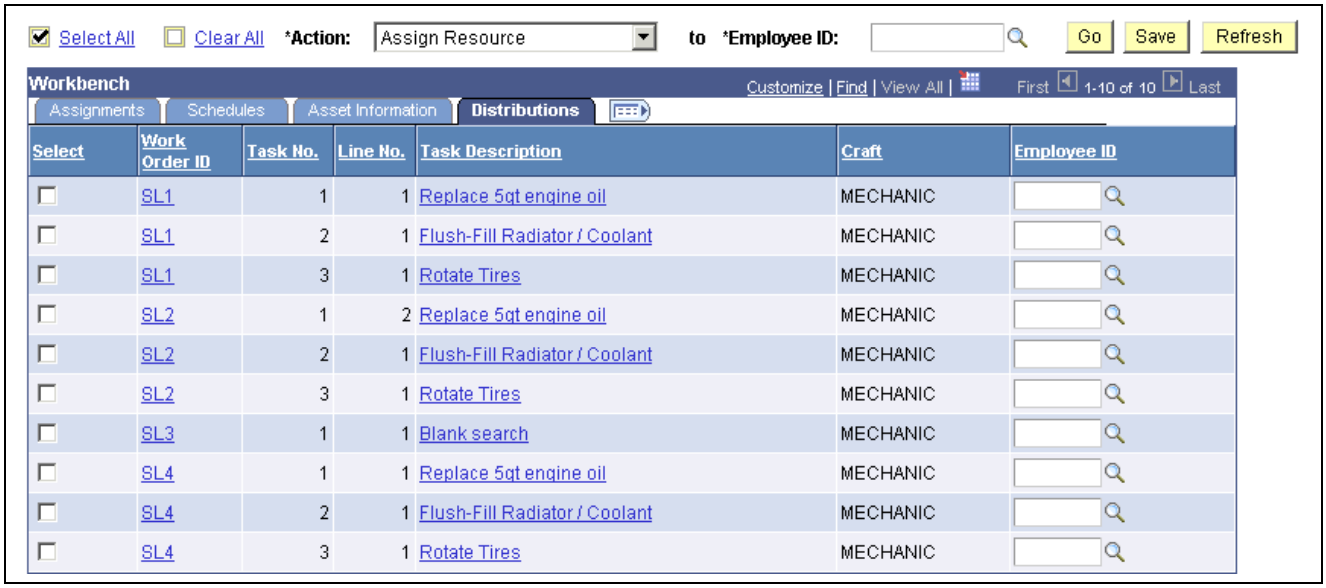
Work History Click this link to view the Work History page for the asset associated with the task.

Asset's Calendar Click the calendar icon to access the calendar for the asset associated with this task. The calendar displays the availability of the asset.

Defining the Distributions Tab of the Labor Assignment Workbench

Access the Labor Assignment Workbench page, and select the Distributions tab.



Labor Assignment Workbench - Distributions tab

Distributions Click this link to display the Labor Distributions page. You can modify the assigned values, if necessary.

Note. This tab displays if the View and Update Task Accounting check box is selected on the User Preferences - Maintenance Management page for the user.

See Chapter 5, "Setting Up PeopleSoft Maintenance Management System Parameters," Setting Up ChartField Distributions for PeopleSoft Maintenance Management, page 119.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

Using Crew Schedule Metrics

This section discusses how to:

- Review adjusted crew schedule metrics.
- Review system crew schedule metrics.

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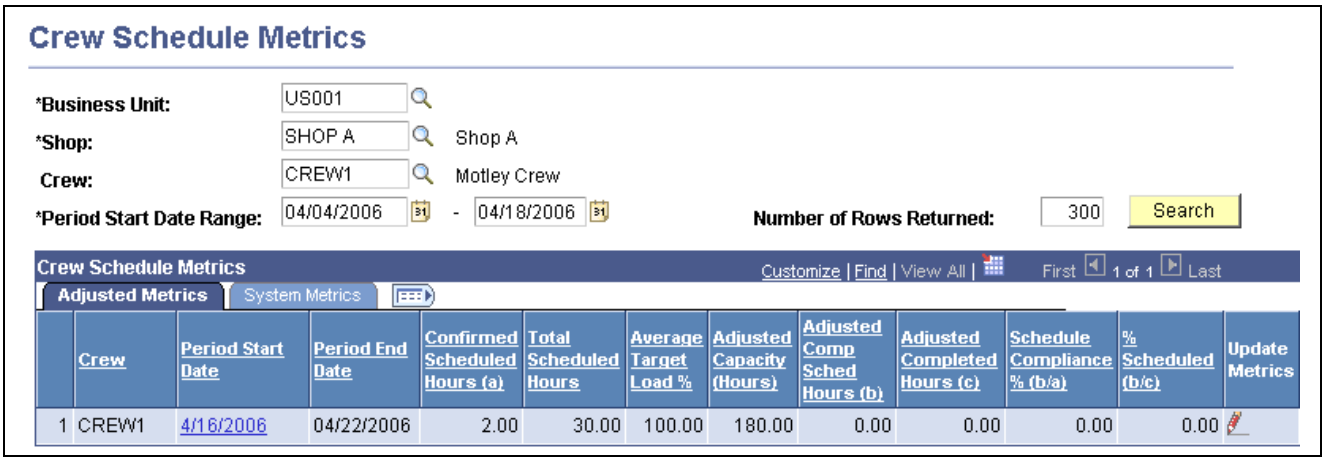
- Use the Crew Schedule Compliance Revision page.

Pages Used to Use Crew Schedule Metrics

Page Name	Object Name	Navigation	Usage
Crew Schedule Metrics	WM_CREWSCHED_MT1	Maintenance Management, Crew Schedule, Crew Schedule Metrics, and select the Adjusted Metrics tab.	Review the crew schedule metrics that were adjusted by the scheduler.
Crew Schedule Metrics	WM_CREWSCHED_MT1	Select the System Metrics tab.	Review the crew schedule metrics for one or more crews that were generated by the system.
Crew Schedule Compliance Revision	WM_CREWSCHED_MT2	Click the Update Metrics link on the Adjusted Metrics tab of the Crew Schedule Metrics page.	Review and adjust the crew schedule metrics for each craft that comprises a crew.
Crew Schedule Compliance Revision	WM_CREWSCHED_MT2	Select the Last Updated tab.	Review the name of the user who updated the schedule metrics and the date and time that the metrics were updated.

Reviewing Adjusted Crew Schedule Metrics

Access the Crew Schedule Metrics page, and select the Adjusted Metrics tab.



Crew Schedule Metrics page - Adjusted Metrics tab

You are required to select the business unit, shop, and period start date range date and click the Search button to display data in the Crew Schedule Metrics tabs. Select a crew, to display schedule metrics for a specific crew, if more than one crew is associated with the shop.

Confirmed Scheduled Hours (a) Displays the number of hours from the crew schedule that have been confirmed for the period. At the end of the planning phase, when all schedules should have been confirmed, the confirmed scheduled hours should match the scheduled hours. During the current period when unplanned/emergency work starts coming in, the scheduled hours and the confirmed scheduled hours may

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not match. However, when the unplanned/emergency work is confirmed using the override metrics capability, then these hours become part of the confirmed scheduled hours total for each craft in the crew. This figure is derived from the Crew Scheduling Workbench schedule metrics.

Note. A user must be authorized in the User Preferences - Maintenance Management page to override metrics in the Crew Schedule Workbench.

Total Scheduled Hours Displays the number of work order task hours that were actually scheduled for the crew for the schedule period.

Adjusted Target % Load (adjusted target percentage load) Displays the crew's expected load against the adjusted capacity in terms of percentage for all planned work based on the crew scheduler's knowledge of the crew. Typically the target load is set below !00.00 percent to accommodate for any unplanned entries that may occur during the period. This adjusted figure is derived from the crew capacity plan.

Adjusted Capacity (Hours) Displays the crew's total shift hours for the period less any time taken off for appointments, vacation, and such. This adjusted figure is derived from the crew capacity plan.

Adjusted Comp Sched Hours (b) (adjusted completed scheduled hours (b)) Displays the credit given for any completed scheduled tasks for the specified schedule period. This credit is equal to the scheduled hours for the task. If the tasks were not scheduled for the specific period, the completed scheduled hours would be zero. Initially this field equals the completed scheduled hours, which are updated by the Maintenance Schedule Completion Metrics Report process, which can only be run by authorized users who have the Update Crew Schedule Metrics check box selected on the User Preferences - Maintenance Management page. This authorization enables the user to update the metrics online and run the Maintenance Schedule Completion Metrics report.

See Appendix C, "PeopleSoft Maintenance Management Reports," page 673.

Adjusted Completed Hours (c) Displays the adjusted total hours completed, which is credit given for any completed tasks during the specified schedule period (scheduled or unscheduled work). This credit is equal to the scheduled hours for the task. Initially this field is equal to the completed hours updated by the Maintenance Schedule Completion Metrics Report process.

Schedule Compliance % (b/a) Displays the percentage of scheduled hours that were completed during the schedule period. This percentage is derived by dividing the adjusted completed scheduled hours by the confirmed scheduled hours for the schedule period.

% Scheduled (b/c) Displays the percentage of scheduled work completed during the schedule period. This percentage is derived by dividing the adjusted completed scheduled hours by the adjusted completed hours. This is a measurement of how much scheduled work is being completed by the crew compared with the total work completed.

Update Metrics Click this link to access the Crew Schedule Compliance Revision page.

Reviewing System Crew Schedule Metrics

Access the Crew Schedule Metrics page, and select the System Metrics tab.

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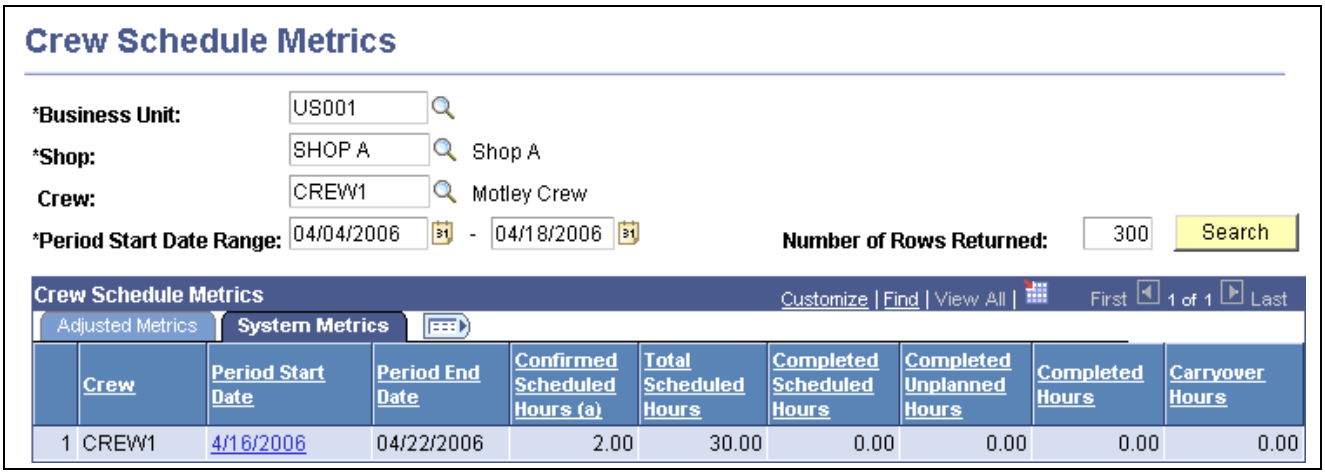

Crew Schedule Metrics page - System Metrics tab

Completed Scheduled Hours Displays the credit given for any completed scheduled tasks for the schedule period. This credit is equal to the assigned hours for the task. If the task were not scheduled for the schedule period, the completed scheduled hours equal zero. The Maintenance Schedule Completion Metrics Report process updates this field when an authorized user submit the process with updating schedule metrics option. The user can be authorized to perform this action through the proper setup in the User Preferences - Maintenance Management page.

Completed Unplanned Hours Displays the total number of hours that the crew spent to complete unplanned work order tasks during the scheduling period.

Note. This figure accounts for only completed unplanned work. If the work is not completed (100% percent complete), it is not added to this field. The completed hours entered by the users on the Crew Scheduling Workbench determines this completed unplanned hours.

Completed Hours Displays the number of hours credited to a completed task (planned or unplanned) for the schedule period. The credit equals the scheduled hours for the task. The Maintenance Schedule Completion Metrics Report Process updates this field when you select the Update Schedule Metrics check box and run the process.

Carryover Hours Displays the total hours remaining for all of the scheduled work order tasks that the crew could not complete within the scheduled period.

Using the Crew Schedule Compliance Revision Page

Access the Crew Schedule Compliance Revision page.

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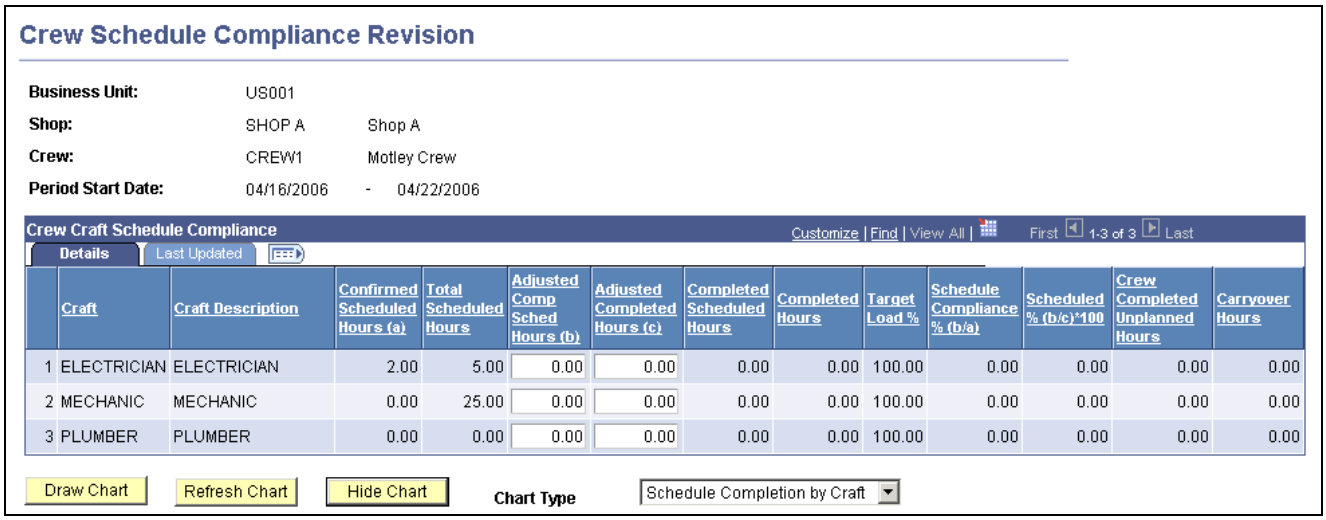

Crew Schedule Compliance Revision page

Details tab

When you click the Period Start Date link or the Update Metrics link on the Crew Schedule Metrics Adjusted Metrics tab, the Crew Schedule Compliance Revision page displays the Details tab. This tab represents a detailed breakdown of the Crew Schedule Metrics Adjusted and System Metrics information by craft. You can update the adjusted completed scheduled hours and the adjusted completed hours values if you are authorized (that is, if the Update Crew Schedule Metrics check box is selected for your user ID on the User Preferences - Maintenance Management page. If it is not selected, these fields are unavailable for update).

Last Updated tab

Select the Last Update tab on the Crew Schedule Compliance Revision page to access the Last Update tab, which displays the name of the user and the date and time that the adjusted completed scheduled hours and the adjusted completed hours were updated for each craft. Once users have update these two values, the Schedule Maintenance Completion Report process will never override these values event it is run with the updating schedule metrics option.

Completion Charts

User can display two graphic charts representing the data.

Draw Chart Select a chart type and click this button to display the graphic chart of the Crew Schedule Compliance data.

Refresh Chart Click this button to refresh the chart data. This is used when you update the data.

Hide Chart Click this button to stop displaying the chart.

Chart Type Select one of the following charts:

- *Schedule Completion by Craft*

  This chart enables users to quickly view the schedule completion data in graphic form, which includes the total scheduled hours, completed scheduled hours, completed unplanned hours, and carryover hours for each craft in a selected crew schedule.

- *Overall Completion Chart*

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This chart enables users to quickly view in graphic form the completed scheduled work, completed unplanned work, and carryover work for a selected crew.

Reviewing the Crew Rescheduling History

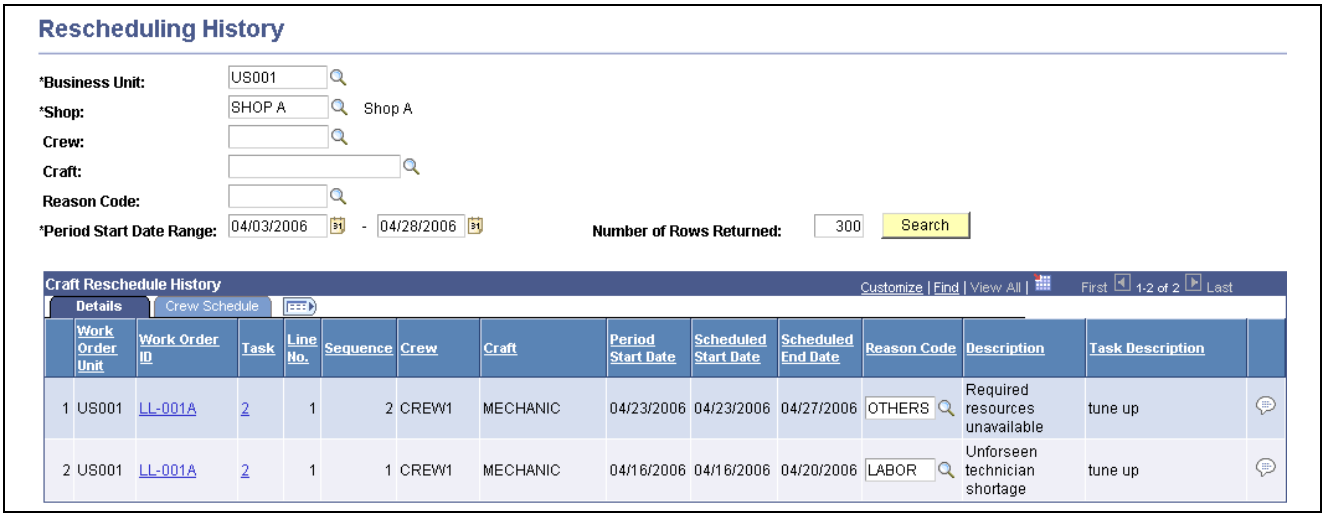
This section discusses how to update the rescheduling history for a crew.

Pages Used to Review the Crew Rescheduling History

Page Name	Object Name	Navigation	Usage
Rescheduling History	WM_RESCHED_HST	Maintenance Management, Crew Schedule, Reschedule History	Review and update the rescheduling history for a crew.
Reschedule Comment	WM_RESCHED_COMMENT	Click the Comment icon in the Crew Reschedule History - Details tab on the Rescheduling History page.	Enter a more detailed explanation for the rescheduling of a specific work order task line.

Updating Reschedule History for a Crew

Access the Rescheduling History page.



Rescheduling History page

You are required to enter at a minimum the business unit, shop and the period start date and click the Search button to display all of the work order tasks, which were rescheduled for a crew on the Craft Reschedule History grids. The remaining search field enable you to narrow your search.

Crew Reschedule History Details Grid

The Details tab consists of a grid, which lists the details of any of work order tasks assigned to a crew that were rescheduled along with the reason codes and descriptions for the rescheduling.

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Reason Code Select another reason code to override the code in the field, if desired.

Click the Comment icon to access the Reschedule Comment page on which you can add a more complete explanation of why a task line was rescheduled for this crew.

Craft Reschedule History Crew Schedule Grid

Select the Crew Schedule tab on the Rescheduling History page to review the crew schedule status, scheduled hours, crew completed hours, and carryover hours for a task that has been rescheduled.

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CHAPTER 20

Understanding Asset Retirement and Component Changeout in PeopleSoft Maintenance Management

This chapter discusses:

- Asset retirement in PeopleSoft Maintenance Management.
- Component changeout in PeopleSoft Maintenance Management.

Asset Retirement in PeopleSoft Maintenance Management

During the course of an organization's operations, physical assets deteriorate and are ultimately retired when the cost of maintaining the asset exceeds the cost of disposing, retiring, and replacing the asset. Depending on the size and complexity of the asset, an organization may need to demolish and remove it during the retirement process, and possibly sell , auction, or donate the asset. You can retire an asset directly in PeopleSoft Project Costing without using Oracle's PeopleSoft Enterprise Maintenance Management. While this process is useful for the partial retirement of assets, it requires substantial user intervention and time. To expedite the full retirement of an asset, however, you can create a work order and identify the asset action as *Retire* for the work order task in PeopleSoft Maintenance Management. PeopleSoft Maintenance Management triggers a process in PeopleSoft Project Costing to automatically perform a full retirement of the asset with little or no user involvement.

In PeopleSoft Maintenance Management, the two methods for retiring an asset using a work order are:

- Retire an asset using a work order associated with a work order-managed project.
- Retire an asset using a work order associated with a Project Costing-managed project.

Specific rules apply to the retirement of an asset in PeopleSoft Maintenance Management:

- PeopleSoft Maintenance Management only performs full retirement financial assets.
- You must set up the Work Order Management options in the Asset Management business unit Interface Options page.
- If the asset is marked Retire in PeopleSoft Maintenance Management, then it will be retired from PeopleSoft Maintenance Management.
- PeopleSoft Project Costing processes the cost of removal based on the retirement filter set up in PeopleSoft Project Costing.

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See Also

PeopleSoft Enterprise Asset Management 9.0 PeopleBook, "Retiring Assets," Retiring Financial Assets

PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook, "Establishing PeopleSoft Asset Management Business Units"

PeopleSoft Enterprise Asset Lifecycle Management Fundamentals 9.0 PeopleBook, "Integrating PeopleSoft Asset Management with Other Products," Integrating Asset Management with Maintenance Management

Asset Retirement Using a Work Order Associated with a Work Order-managed Project

When you create a work order task associated with a work order-managed project to retire an asset, there are basic setup requirements:

- Set up the work order-managed project in PeopleSoft Project Costing.
- Set up the filter rules and criteria for the Project Costing business unit.
- Set up project activity in PeopleSoft Project Costing to derive the asset identification from the work order. The user can enter the filter in the Work Order Task Accounting page, which is updated in PeopleSoft Project Costing when you perform a batch close of the work order (WM_CLOSE).

Asset retirement workflow:

1. Create a work order in PeopleSoft Maintenance Management.
2. Create a work order task in PeopleSoft Maintenance Management for a work order-managed project.

   The project activity is automatically generated.
3. Select *Retire* as the asset action for the work order task and select the labor, inventory, purchased and on-hand materials, and tools required for the removal, and then execute the work order task.
4. Change the work order task status to *complete*.

   This action updates the asset integration rules and the status for the activity in PeopleSoft Project Costing to *Retirement*.

   This action updates PeopleSoft Asset Management for processing asset transactions and creates staging information for PeopleSoft Asset Management to process. The retirement of the asset is completed by the PeopleSoft Asset Management transaction loader process.
5. Close the work order.

   This process triggers PeopleSoft Project Costing to send the costs of transaction related to retirement to PeopleSoft Asset Management.

Asset Retirement Using a Work Order Associated with a Project Costing-managed Project

An organization normally creates a project in PeopleSoft Project Costing that involves the retirement of large-scale assets. Usually these projects can last more than a few days, involve multiple assets, and entail a complex effort that must be actively managed. Project managers can create work orders from PeopleSoft Project Costing that authorize work order tasks that involve the demolition and removal of assets.

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When a work order is created from a Project Costing-managed project to retire an asset, the user selects the asset action *Retire* for a work order task on the Requirements page or the Schedules page of the work order, selects the Retirement radio button and the retirement filter directly in PeopleSoft Project Costing. The work order does not drive the cost of the transaction for this type of retirement. Instead the costs are sent directly to PeopleSoft Project Costing without closing the work order. PeopleSoft Project Costing integration rules determine when to send the cost of retirement from PeopleSoft Project Costing to PeopleSoft Asset Management.

Component Changeout in PeopleSoft Maintenance Management

A component changeout involves the swapping of asset components when the failure or replacement of a component is required to maintain a parent asset and extend or retain a parent asset's useful life. You replace a component with a like component. The characteristics and attributes of the new component are associated with the parent asset.

Specific rules apply to a component changeout:

- A component changeout only applies to capitalized child financial assets. You must update changeouts of smaller, non-financial assets directly in PeopleSoft Asset Management.
- A replacement component must have the same asset profile as the components being replaced.
- A replacement component inherits the asset custodian, location, parent asset, and ChartField designation of the replaced component.
- You can mark each asset as repairable or not repairable in PeopleSoft Asset Management, which means that an asset is repaired or overhauled for use in another asset in the future.
- You must establish the default ChartField mapping rules necessary to accommodate asset component changeout transfers in the PeopleSoft Asset Management warehouse on the Warehouse Mapping page.
- Warranties apply to assets involved in a component changeout as they do for all assets on other work order transactions.

To perform a component changeout:

1. Remove the asset component. (Task 1)

   As part of the removal process, you can:

   - Update the asset disposal information on Work Order Task Accounting page.
   - Retire the asset component. Retirement can have various methods of disposal, such as the selling of an asset.
   - Remove the asset for reuse. (Send it back to the Asset Repository.)

     If the asset is marked repairable, when you select *Remove* for the asset action, you can select a check box indicating that the asset needs repair. (This check box only appears if the asset is marked as repairable in PeopleSoft Asset Management.) When the check box is selected and the work order task is completed, PeopleSoft Maintenance Management notifies PeopleSoft Asset Management that the asset needs repair.

2. Install another asset component to replace the one that was removed. (Task 2)

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When you select the asset action *Install*, the Asset Action: Install page displays where you can indicate that this is a replacement. You identify the *parent component* into which you are installing the new component and select the *removed component*. If the component was removed using a different work order, the work order ID displays along with a description of the removal. You can select an asset that is marked for removal or an asset that is marked for retirement to indicate which asset is being replaced.

Additional rules and principles that apply to component changeouts include:

- You can use two work orders to remove and then install a component, or you can create two work order tasks. You can add the work order task to install a component as long as the task to remove a component is not marked complete.
- Spare parts can be defined as nonfinancial assets in the asset repository. If these parts are used in the performance of a component changeout, the costs do not flow into PeopleSoft Project Costing. If a nonfinancial component is required to repair a component and you want the costs to flow ti PeopleSoft Project Costing, then you must set the nonfinancial asset up as either an inventory or noninventory item.
- If you select parts to repair an asset and the part is not a capitalized (financial) asset in PeopleSoft Asset Management, then it is treated like any other inventory or noninventory part used to repair an asset. This is not treated as component changeout.
- If a technician removes an inventoried item during a repair, then the inventory personnel must use Express Putaway in PeopleSoft Inventory to enter the part into stock and also must put the part in an inventory storage area location identified as nonnettable if the part is damaged or not available for use. Typically parts that need repair are stored in a nonnettable location so that the quantity does not affect the available quantity.
- You can create a work order without a target asset to capture the costs of the labor and parts needed to repair the inventoried part. Once you repair the part, inventory personnel can move it to a nettable storage area location for reuse.
- For inventoried parts that you remove from an asset so that you can repair the parts, you probably want to enter them in PeopleSoft Inventory under a new item ID and identify then as non-cost items. Identifying the items as non-cost items ensures that when and if you issue the refurbished item to a work order, it will not result in an expense transaction, since the part was previously accounted for in a prior financial transaction.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory," Understanding Inventory Material Storage Structures

Component Changeout to Remove and Install Assets

When a work order task is used to remove or install an asset, the processing works the same way it does for any other work order task. The costs of removing or installing the component are sent to the feeder systems (Inventory, PeopleSoft Payables, PeopleSoft Payables, and PeopleSoft Project Costing (tools transaction), which generate the accounting entries that are sent to PeopleSoft Project Costing.

When the status of the removal , retirement, or the install task is changed to *Complete* the work order sends data to PeopleSoft Asset Management. When the work order task is closed, the Cost Summarization process is run automatically and the actual costs are sent from PeopleSoft Project Costing PeopleSoft Maintenance Management.

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CHAPTER 21

Executing and Completing Work Orders

This chapter presents an overview of executing a work order in Oracle's PeopleSoft Enterprise Maintenance Management and describes how to:

- Use the Technician Workbench to execute work orders.
- Stage time entries.
- Expedite work order completion.

Understanding Work Order Execution

Technicians, who are assigned to a work order task can access their assigned tasks using one of three methods in PeopleSoft Maintenance Management, which include:

- Accessing the task using the Technician Workbench.
- Accessing the task in the assigned resource's monthly schedule.
- Receiving a hard copy of the task.

As work on a work order task progresses, the technician or an authorized maintenance administrator is charged with entering each technician's time, usage of tools, and management of materials for the task. Completion of tasks may also require additional labor, materials, and tools. The Technician Workbench component in PeopleSoft Maintenance Management enables technicians and assigned users to enter actual labor time entries by employee, material and tool usage for multiple tasks associated with multiple work orders all at once. Users can also use the Technician Workbench to manage and update the status, the actual start dates and times, and problem, cause, and resolution data for multiple work orders and tasks. The system calculates the actual cost of any labor performed and materials or tools used based on the actuals entered in the Technician Workbench.

After you submit time entries on the Technician Workbench, you must stage the entries in PeopleSoft Maintenance Management to ready them for transfer to PeopleSoft Project Costing. The labor and Inventory transactions are sent to the Inventory and PeopleSoft Payables subsystems where they are processed and the costs are sent to PeopleSoft Project Costing. The tool usage transactions are sent directly to PeopleSoft Project Costing for processing. PeopleSoft Project Costing runs its Pricing engine, capitalizes the costs in PeopleSoft Asset Management, if applicable, generates chargebacks, and sends them to the General Ledger business unit specified in the work order business unit for posting. After the actual costs are generated in PeopleSoft Project Costing, you can run the Cost Summarization process in PeopleSoft Maintenance Management to add the total actual costs for the work order tasks to the Costs page in the work order.

This section discusses:

- Prerequisites for executing completing a work order.
- The Technician Workbench.
- Labor time entry.

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- Materials management.
- Tools usage.
- Meter reading entry.
- Procedures.
- Causal parts entry.
- Crew assignment time reporting.
- Work order tracking.
- The Cost Summarization (WM_COSTSUMM) process.
- Time entry staging and processing.

Prerequisites for Executing and Completing a Work Order

Prerequisites for executing and completing a work order using the Technician Workbench include:

- Authorizing users in your organization to perform activities on the Technician Workbench based on selections on the Maintenance Management page of the User Preferences component, including the entering of a default Work Order Business Unit.

  See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Defining Maintenance Management User Preferences.

- Set up for time entry and processing.
  - Set up employees entering time both in PeopleSoft Maintenance Management and in PeopleSoft Payables.
  - Set up employees entering time as resources in PeopleSoft Maintenance Management.
  - Grant authorization to users who are authorized to enter time in the Technician Workbench using Manage Expenses Security in PeopleSoft Payables.
  - Set up all the general ledger business units that have been assigned to employees in the PeopleSoft Payables setup on the Project Costing Integration Template.
  - Set up the Billing Type and the Billing Action in the Time and Expenses, Employee Information, Update Profile.
  - Set up Time Reporting Codes in Set Up Financials/Supply Chain, Product Related, Expenses, Management, Time Reporting Codes.
- Set up for Inventory entry and processing.

  Set up the Transaction Accounting Rules for the Work Order Usage Group (231) in Cost Accounting for the Inventory business unit.
- Set up for tool usage processing.
  - The cost and bill rates for tool usage are either based on the rates set up for the asset type and subtype on the Tool Rates page of the shop or the rates defined for the asset subtype in PeopleSoft Asset Management, Physical Definitions, Asset Subtype.
  - The PeopleSoft Maintenance Management Tools Usage (TUG) System Analysis Type is set up in Installation Options, Project Costing Integration.

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The Technician Workbench

Typically, after the scheduler schedules work order tasks for a work order, technicians can access the Technician Workbench and search for their assigned tasks. You can customize which fields display, as well as their order, in the Technician Workbench to meet your organization's specific needs. To simplify the task of locating assigned work order tasks, technicians can set up and save search criteria for later use. The technician then reviews the task information and executes the task.

Note. Schedulers can also skip online labor assignments and print a hardcopy to give to the one or more technicians assigned to perform the work order task.

Using the Technician Workbench, the technician or an authorized maintenance administrator can:

- Access the technician's monthly, weekly, and daily calendar.
- Enter labor time spent on the task.
- Enter quantities used and manage the pickup and return of inventory materials for the task.

  Note. There is a link to Inventory, Fulfill Work Orders, Issue to Work Orders component where materials can be issued for work orders.

- Enter the usage of tools for the task.
- Review and modify the checklist, attachments and review the instructions associated with a work order task.
- Enter meter readings for the asset that is being maintained or repaired in a task.
- Enter any causal parts related to the task.
- Report crew assignment time for tasks assigned to crews.
- Change the status of one work order task or multiple work order tasks at the same time.
- Print assignments and informational reports.
- Access a specific work order or task in the work order component.
- Update an asset's location, area or offline status.
- Add notes to the task.
- View and update any supplemental data associated with a task.
- Enter or modify actual start and end dates and time for a selected work order task or multiple work order tasks all at once.
- If authorized, enter planned and actual downtime for the asset being repaired or maintained in the task.
- Enter or modify problem, cause, and resolution codes for a selected work order task or multiple work order tasks all at once.

Note. The level of security set up for a user determines the user's level of access to the Scheduling page. Technicians normally do not have access to modify schedules.

The Work Order Tasks grids include:

- A Details grid, on which you can:
  - Directly access the Scheduling page for a work order task and add or modify the task and the resource schedules.

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- View details about the work order and work order task.
- Determine whether the asset is being installed, removed, or retired.
- Review the status of the task.

- A Details 2 grid, on which you can view the:
  - Assignment.
  - Scheduled and required start and end dates and times.
  - Asset business unit and location.
  - Work order's project information.
  - Names of the supervisor, lead person, and scheduler for the task.
- A Task Actual Dates/Times grid, on which you can enter the actual start and end dates and times for each task.

  You can also make mass changes to actual dates for multiple tasks by selecting the Mass Change button, which displays a secondary page that enables you to perform mass changes to actual dates and times and PCR data.
- A Failure Reporting grid, where you can select a problem group, problem, cause, and resolution (PCR) for each of the tasks (if this information was not entered on the work order task Requirements page).

  You can override any default PCR values derived from the work order task requirements. You can also click the Mass Change button and access a secondary page to make mass changes to PCR codes for more than one task.

Note. You can track the progress of a work order using the Work Progress Tracking Inquiry.

See Chapter 23, "Reviewing PeopleSoft Maintenance Management Inquiries," Using the Work Progress Tracking Inquiry, page 643.

Status Transitions

Technicians can change the status of assigned tasks in the Technician Workbench. You can select multiple tasks and select a status in the Change Status field. When you click the Go button, a Change Status page displays where you can change each of the individual tasks statuses for selected tasks. You can also review any editing errors, add notes, and notify the scheduler concerning the status change. Users (technicians and schedulers) must be set up in User Preferences as authorized to complete and close a work order task or work order before they can change the status of a work order task or work order to *Complete* or *Closed*. These authorized users can change a *Closed* task back to a status of *Complete.* You cannot cancel tasks from the Technician Workbench or the Work Order Workbench. *Canceled* and *Closed* tasks appear as display only. A status that is set up with an internal status of *Cancel*, will not appear on the list of available statuses in the Technician Workbench.

There are edits that prevent you from changing the status of a work order task to *Complete* if the work order has inventory on a pick plan or has an open peg.

Important! You may notice that the sample data that accompanies your PeopleSoft Maintenance Management application displays a user-defined status of *Canceled - Work started but no longer needed.* However, if you review the setup of this status in Set Up Financials/Supply Chain, Product Related, Maintenance Management, Setup, Work Order Status, you will see that the internal status is *Complete*.

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Service Requests

When technicians access their work order task assignments in the Technician Workbench, a link displays at the top of the page, which indicates that they have a specific number of open service requests assigned to them. The link only displays if they have at least 1 open service request assigned to them.

Agents can assign service requests to technicians with or without a work order. When an agent assigns a technician to a service request that is not associated with a work order, the technician does not record labor time or material and tool usage. In many organizations, any routine task that takes less than fifteen minutes to address and complete is a simple service request and does not require the creation of a work order. The technician normally just accesses the service request and changes the status to complete once the work is done. This link in the Technician Workbench enables a user to access all service requests assigned to the resource, regardless of whether they are associated with a work order.

Labor Time Entry

You can enter labor time on the Technician Workbench for an employee using one of two time entry methods:

- Punch time, in which you enter each date worked and enter a start and end time for each date, depending on the specified time reporting period.
- Elapsed time, in which you enter time worked for each day of a specified time reporting period.

You select the time entry method in the User Preferences, Maintenance Management page for each type of user, and specify the time reporting period in each employee's data file.

An authorized user can enter time for the employees who are assigned to perform the work order task or are members of the valid work order resources. You must use Manage Expenses Security in PeopleSoft Payables to grant authorization to the authorized user who enters time in the Technician Workbench.

Important! Anyone who enters time in the Technician Workbench must be set up as a resource in PeopleSoft Maintenance Management and in PeopleSoft Payables. If a resource is not set up in PeopleSoft Payables, there will be no time sheet in the technician's workbench for this resource. You must set up all the general ledger business units that have been assigned to employees in the PeopleSoft Payables setup to the Project Costing Integration Template.

See *PeopleSoft Enterprise Expenses 9.0 PeopleBook*, "Securing Your PeopleSoft Expenses System," Understanding Security for PeopleSoft Expenses.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Setting Up PeopleSoft Project Costing Control Data," Defining Templates for Integration with Other Applications.

Personnel who are authorized to perform time entry on the Technician Workbench:

- Cannot enter time against a closed or canceled work order task.
- Can only enter time associated with a work order task.

  You cannot enter personal time. If you want to track time taken for non-productive time, you can create a standing work order to track this time.
- Cannot change the labor billing rate and cost rate.

  These rates are predefined in either the work order business unit or the shop associated with the work order.
- Can enter no more than twenty-four hours for each time entry date.
- Cannot enter overlapping time in punch time entry within the same date time range on a time sheet.

  Time sheets for elapsed time only allow the time entry for one task at a time.

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Note. There is no relationship in the system between overbooking resources in a task listed in the Labor Schedules grid of the work order and entering time for resources.

- Can enter time and make prior period time entry adjustments up to the point when a work order task is closed.
- Cannot enter negative time.

Important! The system considers that all time entries are based on local time and does not perform time conversions. In addition, there is no validation of holidays or weekends.

Time Entry Staging and Processing

Once a user enters the time for a work order task, using either the punch time or elapsed time entry method on the Technician Workbench and submits the entries for posting, the Expense Post Status in the Technician Workbench for labor changes to *Posted*. The time keeper must then stage the time entries into the PeopleSoft Payables staging tables, where the labor hours are picked up by PeopleSoft Project Costing. PeopleSoft Project Costing uses the Pricing engine and Rate Sets to price the labor costs. The transaction costs are stored in the PROJ_RESOURCE table. PeopleSoft Project Costing applies its rules, capitalizes the costs in PeopleSoft Asset Management, if appropriate, and posts the costs to the general ledger business unit associated with the work order business unit. When you run the Cost Summarization process in PeopleSoft Maintenance Management, PeopleSoft Project Costing updates the total actual costs for the work order task stored on the Costs page of the work order.

If you installed PeopleSoft Payables and use the full functionality, you can set up PeopleSoft Payables workflow to enable the approval of time entries. If you do not install and use PeopleSoft Payables, then all time entries that you submit from the PeopleSoft Maintenance Management Technician Workbench are considered pre-approved.

To actually stage the entries to PeopleSoft Project Costing from PeopleSoft Payables, you must access the PeopleSoft Maintenance Management Stage Time Entries component where you can indicate that you want to stage the time entries to PeopleSoft Project Costing or publish the elapsed time, which are treated the same as any other time entered in PeopleSoft Payables.

Once the entries are staged in the PeopleSoft Payables staging table (EX_PROJ_RES_STG), then PeopleSoft Project Costing retrieves the entries from the staging tables using the Cost Collection, Expenses (PC_EX_TO_PC) application engine, where PeopleSoft Project Costing derives the labor cost rate based on the rate set. The calculated cost is updated in the PeopleSoft Project Costing PROJ_RESOURCE table. PeopleSoft Project Costing's pricing engine (PC_PRICE) either marks up or discounts the costs for chargebacks, if applicable. When you run the PeopleSoft Maintenance Management Cost Summarization process (WM_SUMMCOST), it summarizes the actual labor costs calculated by PeopleSoft Project Costing to the work order header and work order task.

Prior Period Adjustments

When you submit and stage the time entries the first time, the system assigns these entries a version number of *1* to these entries. However, you may need to modify time entries that you previously submitted and staged in a previous period. You can make prior period adjustments to time entries by selecting the Time Entry link in the Technician Workbench and search for the entries based on a specified start date. You can then modify the entries and save the entries as often as you want without affecting the version number. Saving the entries enables you to exit the workbench and to return to them and make further modifications before you process them. When you finally submit and stage the entries again, the new version number for the record is now two. You can modify the time entries in a prior period any number of times and each time you submit and stage them they are assigned a new version number. Once a work order task is closed, you can no longer adjust prior period time entries.

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Materials Management

Users can access the Materials page in the Technician Workbench component to:

- View and gather materials.
- Acquire additional materials.
- Return materials.

Before beginning an assigned task, a technician can access the Technician Workbench and view a list of the materials assigned to the work order task. The Materials page lists inventory materials, floor stock, as well as purchased and on hand materials identified in the work order's Schedules page. If desired, the technician can print a detailed list of the materials needed for the task. The printout specifies which materials will be delivered and which materials the technician needs to obtain from the inventory store.

The combination of the item type and delivery instructions provides a technician with the information needed to gather the materials and provides PeopleSoft Inventory with the delivery instructions for the materials. Delivery instructions are updated by the planner or scheduler and can include special handling instructions. A truck icon that displays in the task line in the workbench indicates that the materials are to be delivered to the work location.

Based on PeopleSoft Maintenance Management User Preferences, a technician can also generate and print a picking plan for materials that require gathering from the inventory store. The technician takes this plan to the inventory store and the inventory clerk uses the plan to locate the items needed for the task and gives them to the technician. A scheduler can also generate a picking plan, which enables PeopleSoft Inventory to pick the items ahead of time.

If additional quantities of materials are needed, the technician can:

- Ask the scheduler to reserve additional quantities of materials in PeopleSoft Inventory. Once these materials are added to the schedule, the technician can list them in the Technician Workbench and generate another picking plan to obtain them from PeopleSoft Inventory.
- Enter a direct issue in PeopleSoft Inventory from the Technician Workbench for the unscheduled items, if the technician has access to the Issue to Work Orders component. PeopleSoft Inventory creates an issue transaction, which updates one or more Inventory lines for a task in the work order.

If the materials ordered are shorted or damaged, the technician must contact the delivery store, where the inventory personnel handle the problem and update the PeopleSoft Inventory system. Inventory items that are not in stock are automatically ordered and replenished through the PeopleSoft Inventory system. If the items are needed immediately, the technician can contact the scheduler, who can create a purchase order to order the items. If the materials are crucial to the progress of the work order task, then the technician, scheduler, or planner can put the task on hold until the materials are received.

Materials must be returned to PeopleSoft Inventory when they are not needed for the task, are damaged or defective, or the task is cancelled. The two return processes are:

- Return the materials to PeopleSoft Inventory.

  Users can access the Issue to a Work Order page from the Technician Workbench and select the Return Parts check box. The transaction reduces the quantity issued on the materials list in PeopleSoft Maintenance Management for the work order task.

  PeopleSoft Inventory takes care of the return details.

- Return the materials to the shop.

  The scheduler or other authorized personnel typically will handle the return via PeopleSoft Purchasing or Receiving.

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See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Receiving Interunit Transfers and RMAs.

Inventory Cost Collection

Inventory usage is tracked in the Technician Workbench as information. Once you schedule inventory parts for a work order and the Inventory parts are committed and reserved in PeopleSoft Inventory, a pick plan is run to select the items from PeopleSoft Inventory, and PeopleSoft Inventory issues the items (parts). Inventory transactions are created based on the issuing of the items (parts). The processing steps are:

1. Set up the transaction group 231, Work Order Usage, in Cost Accounting, Transaction Accounting Rules.

   PeopleSoft Cost Management has its own rules for accounting for inventory issues. The rules can vary by storage area locations. PeopleSoft Maintenance Management has standard rules for the distribution ChartField values for issues. The Accounting Rules page enables you to set up the debits and credits for an issue from PeopleSoft Inventory. The debit is a basic expense account and the credit is an Inventory account.

2. Access the Cost Accounting, Inventory and Mfg Accounting, Create Accounting Entries, Cost Accounting Creation to create cost accounting entries to stage data to the PeopleSoft Project Costing tables . (CM_ACCOUNTING_LN)

   You can run this process for a specific transaction group, Inventory business unit, and book name. Review the output to ensure that the data was staged.

   Note. Make sure the accounting date is far enough in the future.

3. Access Project Costing, Cost Collection, Inventory to pull the Inventory costs into PeopleSoft Project Costing to run the PC_IN_TO_PC process.
4. Access Project Costing, Interactive Reports, Manager Transaction Review and select the Cost Review page to see that Inventory actual costs were loaded into the PROJ_RESOURCE table.
5. Run the Cost Summarization process to view the actual Inventory costs in the Actuals page of the work order.

   Note. If you close the work order, the Cost Summarization process runs automatically.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management".

Tools Usage

To complete a task, the technician typically returns the checked-out tools and enters tools usage in the Technician Workbench. Recording tools usage is optional. A user can only access this link if the Record Actuals Tools Usage check box is selected in the Definition page of any work order business units that are associated with the work orders listed in the Technician Workbench.

In the Technician Workbench, users can:

- Enter tools usage for work order tasks up to the time that a work order task is closed.
- Insert a new row, select a tool, and enter the actual start and end dates and the tool usage, if either the business unit or shop does not allow the scheduling of tools or additional unscheduled tools were needed to complete the task.

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The system backfills the schedule and distribution fields after an unscheduled entry is saved in the Technician Workbench.

- Update an existing tool usage record.

Note. To maintain the ability to differentiate between the scheduled usage and the actual usage, a user cannot delete a tool usage record. However, a user can enter the actual usage in a row as zero to indicate that the tool was not used even though it was scheduled for the task. Since there is only one transaction per task tool resource, each revision replaces or updates the previous record and there is no record of each incremental change. Users enter a new row with a negative value or a positive value to adjust a previous record's quantity.

When you enter tool usage in the Technician Workbench or the Work Order Completion component, you enter the quantity used and the transaction dates. You can override the tool cost and bill rates default values that are derived from the asset type and subtype or the shop's Tool Rates page. If authorized in User Preferences, you can override the distribution values for the assigned row on the work order task. If there is a difference between the currency code for the tool rates in PeopleSoft Asset Management and the currency code in the work order business unit, the tool costs that display in PeopleSoft Maintenance Management are always converted to the currency specified in the work order business unit. The system updates the tools schedule and actuals table with actual quantity used when the technician saves the entry. These values display on the Actuals page of the work order.

After the tools data is entered on the Technician Workbench:

- You run the Cost Collection process for PeopleSoft Maintenance Management in Project Costing. (Project Costing, Cost Collection, PeopleSoft Maintenance Management) This pulls the data into the PROJ_RESOURCE table.

Note. The actual tools rows in the Technician Workbench cannot be modified after PeopleSoft Project Costing pulls the data into the PROJ_RESOURCE table.

- The GL Distribution status is changed to HOLD in PeopleSoft Project Costing.
- You run the Cost Summarization process in PeopleSoft Maintenance Management (or close the work order to run the process automatically) to display the actual tool costs on the Costs page of the work order.
- If you close the work order, GL Distribution HOLD status is removed to enable the calculation of chargebacks and the distribution of accounting entries to the PeopleSoft General Ledger from PeopleSoft Project Costing.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Integrating with Maintenance Management," Work Order Labor and Tools Usage Costs.

See Chapter 14, "Creating a Work Order," Work Order Task Accounting, page 373.

Meter Readings

You can enter meter readings in the Technician Workbench for the asset associated with the work order task if that asset is defined as a metered asset in PeopleSoft Asset Management. Typically, meter readings are entered for preventive maintenance work orders, but they also can be entered for any type of work order against an asset that has a meter. You can also indicate if this is the first reading for the asset after a replacement or a rollover. This information updates the PeopleSoft Asset Management Meter Reading History for the asset.

See Chapter 12, "Setting Up and Generating Preventive Maintenance Work Orders," Understanding Preventive Maintenance Work Orders, page 283.

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Procedures

The Procedures page in the Technician Workbench enables a technician to update the checklist, review the instructions, and open, add, and delete any attachments associated with a work order task. You must complete the required checklist items before you can change the task status to complete.

See Chapter 14, "Creating a Work Order," Pages Used To Create a Work Order, page 382.

Causal Parts

A technician can access the Causal Parts page in the Technician Workbench and record the parts that caused the problem of the work order. A causal part can be an inventory item, an asset or just an open text description. This information is included in an existing warranty claim.

Crew Assignment Time Reporting

You can select this tab on the Technician Workbench to:

- Report the completed date for a crew scheduled task.
- Update carryover hours for a crew scheduled task.
- Update completed man hours for a crew scheduled task.

You can select multiple rows and select one of the above actions to apply to the rows. You can also enter the data on each individual row. If the completed hours are equal to the carryover hours and you save the page, the carryover hours field is changed to zero. When you save the data, the system updates the corresponding crew assignments. These changes will be reflected in both the Crew Scheduling Workbench, when you select the same crew assignments, and the Labor Requirements grid when you access the affected work order.

Important! Since you enter crew assignment time based on each craft, you must enter time for each employee either on the Technician Workbench or on the Work Order Completion component.

Using the Technician Workbench to Execute Work Orders

To execute a work order use the Technician Workbench (WM_WOE_WB1) component.

This section discusses how to:

- Use the Technician Workbench.
- Enter punch time for a work order task.
- Enter elapsed time for a work order task.
- Enter materials.
- Enter tool usage.
- Enter meter readings.
- Review procedures.
- Enter causal parts.
- Report crew assignment time.

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- Print work order tasks detail reports.

Pages Used to Execute Work Orders

Page Name	Object Name	Navigation	Usage
Technician Workbench	WM_WOE_WB	Maintenance Management, Workbenches, Technician Workbench	Select, search, update, and print work order tasks.
Task Search	WM_TSK_SRCH_SEC	Maintenance Management, Workbenches, Technician Workbench. Click the Search button on the Technician Workbench page.	Perform ad-hoc views (searches) and save and delete views.
Change Status	WM_WOE_STATUS	Select a status and click the Go button on the Technician Workbench.	Perform a mass status change.
Work Order Task Detail Report Options	WM_RPT_OPTNS	Click the Print button on the Technician Workbench.	Select specific options and reports that you want to print.
Workbench Mass Change	WM_WOE_MASS_SEC	Click the Mass Change button on the Technician Workbench page.	Change the actual dates and times and/or the PCR codes for multiple work order tasks.
Work Order Details	WM_WOE_DETAIL	Click the Work Order ID for a selected task on the Technician Workbench.	Review the work order header information and work order task details and dates for the selected task.
Asset	WM_WOE_ASSET	Click the an Asset link in the Details grid.	Add or modify the asset's offline status, location, area and effective date.
Asset Warranties	ASSET_WARRANTY	• Click the Asset Warranties button on the Work Order page. • Click the Asset Warranties button on the Requirements page. • Click the Asset Warranties button on the Schedules page.	Display the asset warranties associated with the specified asset. If a warranty does not exist, users with update access to the page can create an asset warranty for the asset using a Warranty Template.
Notes	WM_TSK_NOTES	Click the View link for Notes in the Details grid of the Technician Workbench.	Review or add notes associated with the task.
Supplemental Data	WM_WOE_SD	Click the View link in the Details grid of the Technician Workbench.	Review or update supplemental data associated with the task.

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Page Name	Object Name	Navigation	Usage
Checklist	WM_WOE_CKLST	Click the Pre-task or Post-task Checklist button the Technician Workbench - Details grid.	Select check box to indicate that the pre-task or post-task step has been completed.
Work Order Task Elapsed Time Entry	WM_ETIME_ENTRY	Click the Time Entry link on the Technician Workbench page.	Enter elapsed time entries for this work order task.
Work Order Task Punch Time Entry	WM_PTIME_ENTRY	Click the Time Entry link on the Technician Workbench page.	Enter punch time for the work order task.
Materials	WM_WOE_MTLS	Click the Materials link on the Technician Workbench page.	Review inventory and floor stock scheduled for the task, issue the selected materials to the work order, generate a pick plan, and directly access the Schedules page of a selected work order task.
Work Order Task Tools Usage Entry	WM_TLS_USAGE	Click the Tool Usage link on the Technician Workbench page.	Enter the dates and times and quantity a tool was used for a work order task.
Meter Readings	WM_WOE_METER	Click the Meter Readings link on the Technician Workbench page.	Enter meter readings and view meter trend chart for the asset on which the work order task was performed.
Advanced Options	AM_MTR_ADV_OPTIONS	Click the Advanced link in the Current Meter Readings grid in the Meter Readings page.	Review reading details for the selected asset.
Procedures	WM_WOE_LIST	Click the Procedures link on the Technician Workbench page.	Review a work order task's checklist, instructions and attachments associated with the task.
Causal Parts	WM_WOE_CAUSAL_PART	Click the Causal Parts link on the Technician Workbench page.	Enter one or more parts responsible for causing the failure or the need for the task.
Report Crew Assignment Time	WM_CS_RPRTHRS_WB	Click the Report Crew Assignment Time link on the Technician Workbench page.	Enter carryover hours, completed hours, and the completed date for a crew assigned to a task.
WO Issue Search	IN_WO_ISS_SEARCH	• Click the WO Issue Search tab in the Inventory Work Order Issues component. • Inventory, Fulfill Work Orders, Issue to Work Orders	Enter criteria to search for inventory materials scheduled for work orders associated with a specific Inventory and work order business unit.

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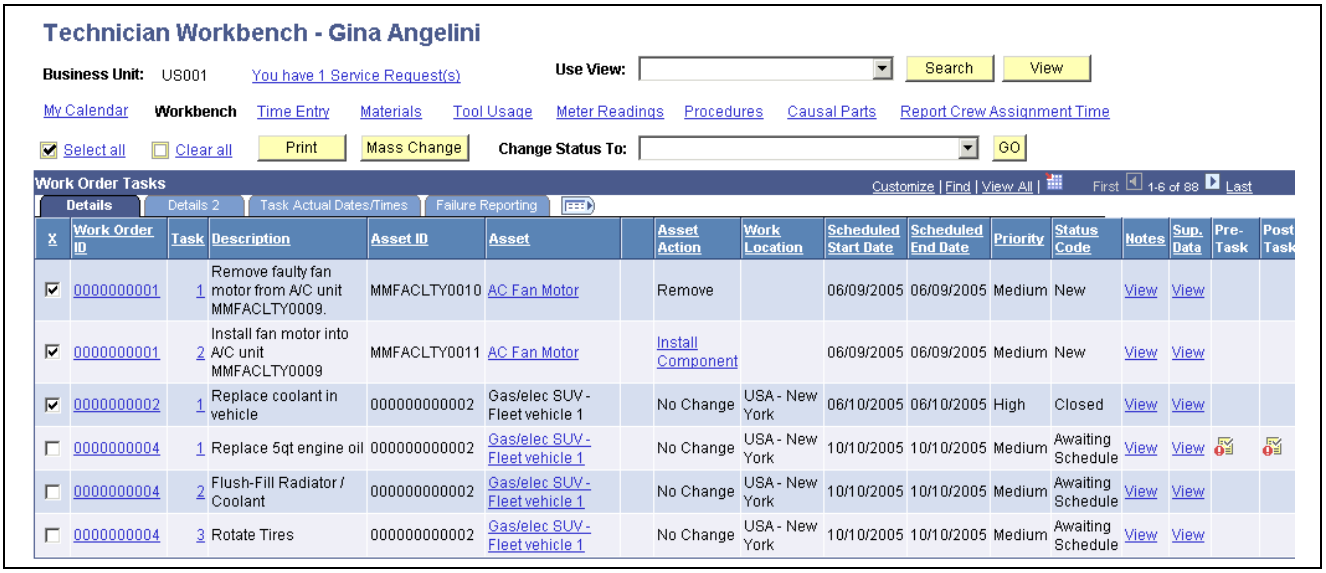
Page Name	Object Name	Navigation	Usage
WO Issue Location	IN_WO_ISS_LOC	Click the WO Issue Location tab.	Issue inventory to a technician from a specific inventory location.
WO Issue Summary	IN_WO_ISS_SUMMARY	Click the WO Issue Summary tab.	Review the total quantities of an item requested, allocated, and issued in PeopleSoft Inventory for a work order task.
Downtime Entry	WM_WO_DOWNTIME	Click the Downtime link on the Task Actual Dates/Times grid on the Technician Workbench	Enter planned and actual downtime for the asset associated with the task.

Using the Technician Workbench

Access the Technician Workbench page.



Technician Workbench page

You have "n" Service Requests

Click this link to access the Service Request Inbox page, which lists the service requests assigned to this technician. This list includes service requests associated with a work order and service requests in which the agent assigned the task to a technician without creating a work order.

Important! This field only appears on the Technician Workbench if one or more of the work orders is associated with a service request.

Use View and **View**

Click the View button to access the Task Search page, where you enter and select criteria to narrow your search for Tasks. When you click the Save View button, you save the named view for later use. If you want to perform a search based on a saved view, you select the view name in the Use View field and click the Search button to search for Tasks based on the view's criteria and list them in the Work Order Tasks grid. Alternatively, to do an ad hoc search

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you can enter any search criteria in the Task Search page without saving a view and click the Search button.

See Chapter 18, "Scheduling a Work Order," Creating Work Order Task Search Views, page 517.

My Calendar Click this link to access the technician's monthly calendar. You must create the technician as a PeopleSoft Maintenance Management resource in PeopleSoft Resource Management.

Note. The calendar that displays when you click this link is the calendar of the user who logs on to the system. If this person is the technician, the technician's calendar displays. If this person is an administrative person who is authorized to enter data for one or more technicians, the administrative person's calendar displays.

Workbench Click this link in other pages that you can access from the workbench, such as the Work Order Task Punch Time Entry page to return to the Technician Workbench.

Time Entry Click this link to access either the Work Order Task Punch Time Entry page or the Work Order Task Elapsed Time Entry page to enter time for the selected task.

Important! You must add all the general ledger business units that are assigned to employees in the Time & Expenses setup to the Project Costing Integration Template.

See Chapter 21, "Executing and Completing Work Orders," Labor Time Entry, page 599.

Materials Click this link to access the Materials page.

See Chapter 21, "Executing and Completing Work Orders," Materials Management, page 601.

Tool Usage Click this link to access the Tool Usage page.

See Chapter 21, "Executing and Completing Work Orders," Tools Usage, page 602.

Meter Readings Click this link to access the Meter Readings page.

See Chapter 21, "Executing and Completing Work Orders," Meter Readings, page 603.

Procedures Click this link to access the Procedures page.

See Chapter 21, "Executing and Completing Work Orders," Procedures, page 604.

Causal Parts Click this link to access the Causal Parts page.

See Chapter 21, "Executing and Completing Work Orders," Causal Parts, page 604.

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Report Crew Assignment Time Click this link to access the Report Crew Assignment Time page.

See Chapter 21, "Executing and Completing Work Orders," Crew Assignment Time Reporting, page 604.

Print Click this button to access the Work Order Task Detail report options page.

See Chapter 21, "Executing and Completing Work Orders," Printing Work Order Tasks Detail Reports, page 620.

Mass Change Click this link to access the Workbench Mass Change page, where you can change the actual dates and times and/or the PCR codes for one or more work order tasks that you select on the Technician Workbench page. You can only update tasks that are not canceled or closed.

Change Status To and **Go** Select a status from the drop-down list and click on Go to access the Change Status page.

Important! All of the links listed above require the selection of at least one task on the Technician Workbench.

Change Status

Select a status and one or more work order tasks and click the Go button to access this page where you can update multiple tasks with the same status at the same time. Optionally, you can leave the Change Status to field blank if you want to change each of the selected tasks individually to a different status. The tasks are each listed with these same fields:

Task Status Displays the current status of the task.

Change Status To Displays the status that you selected in the Change Status To field on the Technician Workbench. If the status is canceled, then the field displays the Canceled status and is display-only. All status changes are edited immediately upon being changed.

Note. You cannot change the status to complete until all the items on the checklist are completed and the Task Actual start/end dates and time are entered.

Notify Scheduler Click this check box to send an email and note to the scheduler that you changed the status for a work order task.

Note Enter a note explaining why you changed the status. You can click the Dictionary icon to check your spelling. If a note is entered, that note is added to the Task Notes. If Notify Scheduler is selected, this note is also emailed to the Scheduler.

Work Order Task - Details

Click this tab to review and modify task attributes.

Note. You can select the Customize link at the top of this grid and choose any columns in any order that you want to display in the Details and the Details 2 grid to suit your business needs.

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Work Order ID Select a task and click this link to access the Work Order Details page, where you can review the work order header information, work order notes, some task details, and task dates for the selected task.

Task Click a task number link to access the selected task in the Work Order - Schedules page. The user's access to data in the work order depends on the user's security profile.

See Chapter 18, "Scheduling a Work Order," page 443.

Asset Click this link to access the Asset page on which you can add or modify whether the asset is offline, add or modify the asset's location and area, and indicate the date from which these changes are effective.

Displays this icon to indicate that the selected asset for the work order task is associated with hazardous materials.

Displays this icon to indicate that there are warranties associated with the selected asset for the work order task.

Asset Action Displays if the asset is being removed, installed, retired, or not changed in the task.

Notes Click the *View* link to access the Notes page to review any notes associated with the selected task.

Sup. Data (supplemental data) Click the *View* link to access the Supplemental Data page. Supplemental data is often set up by an organization to handle hazardous waste requirements.

See Chapter 24, "Using Supplemental Data," Understanding Supplemental Data, page 653.

Click either the Pre-task checklist button or the Post-task checklist button to access the Checklist page, where you can select a Completed check box to indicate that you completed the task. When you select the check box, your (the technician's) name and the time and date that you completed the task appears on the page.

Work Order Task - Details 2

Click the Details 2 tab to review the name of the technician assigned to a task, the task's resource line number in the Labor Schedules grid, the work order's required start and end date and times, the Asset Management business unit and task's location of the asset, the project information for the work order, the shop, and the names of the lead person, supervisor, and scheduler assigned to the task.

Work Order Task - Task Actual Dates/Times

Actual Start Date and **Actual Start Time** and **Actual End Date** and **Actual End Time** Click the Task Actual Dates/Times tab to enter the start and end dates and times when the task was actually performed. These fields are display only when you close or cancel a work order task.

Note. You can update the actual task dates and times for one or more tasks at the same time by clicking the Mass Change button.

Downtime Click this link to access the Downtime Entry page for the asset associated with the task.

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See Chapter 14, "Creating a Work Order," Entering Asset Downtime, page 401.

Work Order Task - Failure Reporting

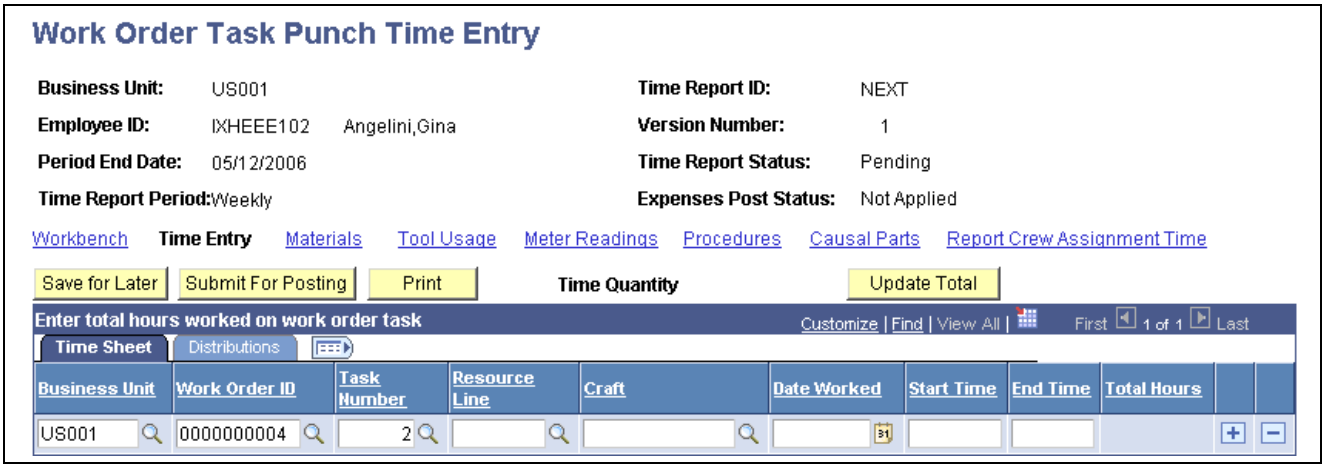
Select the problem group, problem, cause, and resolution codes associated with this task. This information is used for searching and for tracking the task. If you selected these values in the work order's Requirements page, then the default values display in the Technician Workbench fields. You can override the default values.

Note. You can update the PCR codes for one or more tasks at the same time by clicking the Mass Change button.

See Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," Understanding PCR Setup and Tracking, page 125.

Entering Punch Time for a Work Order Task

Access the Work Order Task Punch Time Entry page.



Work Order Task Punch Time Entry page

Time Report ID Generates the next available unique number when you save the entry.

Version Number Indicates how many times a time entry was submitted. The default value for the first time sheet created is zero. The version number increases by 1 with each additional submission of a time sheet. Clicking the Save button does not increase the version number, it retains any changes until you are ready to submit the record again.

Period End Date Displays date based on whether the employee's time is reported daily, weekly, biweekly, or semimonthly. The time period is set up in the employee's data.

See Chapter 8, "Setting Up Labor and Tools Resources," Adding Employee Personal Data, page 182.

Time Report Status Defaults to *Pending* before submission, and to *Approved* after you click the Submit for Posting button.

Time Report Period Displays the time reporting method identified in the employee's data. The methods that you can use in PeopleSoft Maintenance Management are:

- *Daily*

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- *Weekly*
- *Biweekly*
- *Semimonthly*

Expenses Post Status Displays *Yes* if time entry transactions that you submitted to PeopleSoft Payables are posted, and *No* if the transactions are not posted.

Note. PeopleSoft Maintenance Management does not use the *Not Appl* (Not Applied) value.

Save for Later Click this button to temporarily save this time report without submitting it, so that you can add or change information on it later before submitting it for posting.

Note. When you click this button, the system compares the work order and work order task dates, times, and other information with the information entered and does not let you continue until the time entry rows are corrected.

Submit for Posting Click this button to submit the time report transaction to PeopleSoft Payables, where the accounting transactions are processed and sent to PeopleSoft General Ledger and the costs are generated and sent to PeopleSoft Project Costing.

Note. When you click on this button, the system compares the work order and work order task dates, times, and other information with the information entered and does not let you continue until the time entry rows are corrected. Access to this button can be controlled from User Preferences.

Print Click this button to access the Work Order Task Detail Report Options page from which you can select various reports to print.

Time Quantity Displays the total hours entered for this employee.

Update Total Click this button to update the total time entered, which displays in the Time Quantity field. You can continue to click this button to view a running total of the time entered for an employee.

Time Sheet

Select the Time Sheet tab in the Enter total hours worked on work order task group box.

Business Unit, Work Order ID, and **Task Number** Select these values if this employee was not scheduled in the system to work on this work order. If this employee was scheduled and assigned to various work orders and tasks in the Schedules page of the work order, then all of the assigned tasks and their associated work order IDs and business units are listed for this employee.

Resource Line Displays the line in the Labor Schedules grid on which this resource was assigned in the Schedules page of the work order.

Craft Select a craft for this employee, if this employee was not scheduled ahead of time. Displays the employee's craft, if the employee was scheduled ahead of time. You can override this value. This is used to identify the rate by which the hours are multiplied to determine the labor cost.

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Date Worked Select the date that this employee worked on the task.

Start Time and **End Time** Select the start and end times that the employee worked on this task.

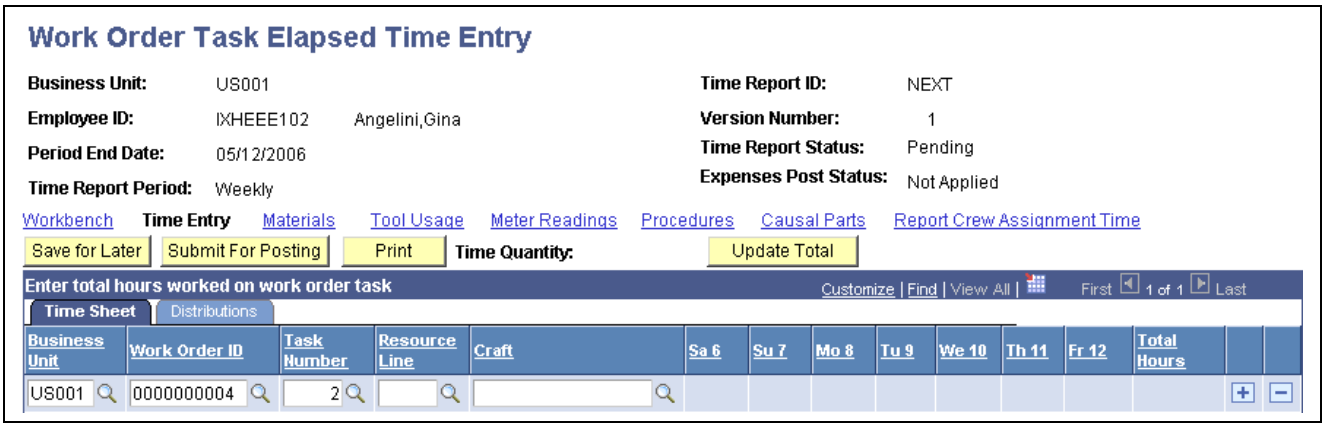
Note. When you either click the Save for Later button or click the Submit for Posting button, system messages display if the date and times entered here are outside of the dates scheduled for the task or do not reflect the dates and times entered in the Labor Schedules row for this employee.

Distributions

Select the Distributions tab in the Enter total hours worked on work order task grid. This displays the ChartField distributions that are associated with the resource line. If this a new resource line (actuals entries only), then default distributions are derived from a distribution template. You can override these values, if necessary.

Entering Elapsed Time for a Work Order Task

Access the Work Order Task Elapsed Time Entry page.



Work Order Task Elapsed Time Entry page

The fields in the header and the buttons in this page work the same way as they do in the Work Order Task Punch Time Entry page.

Time Sheet

Select the Time Sheet tab to enter elapsed time for work order tasks on which this employee worked. In elapsed time entry, you enter the hours worked on specific days of the week based on the Period End Date and Time Report Period.

- If Time Report Period is *Daily*, displays a single day in the Work Order Task Elapsed Time Entry, Time Sheet grid.
- If Time Report Period is *Weekly*, displays the days of the week in the Work Order Task Elapsed Time Entry, Time Sheet grid.
- If Time Report Period is *Biweekly* use the Previous Week and Next Weekbuttons to transfer to the previous week or next week for the other week not currently displayed.
- If Time Report Period is *Semimonthly,*the time entry is the same as for the biweekly page.

  However, you can click the Next button twice from the first week and arrive at the last week, which may have just one day available for time entry depending upon the month.

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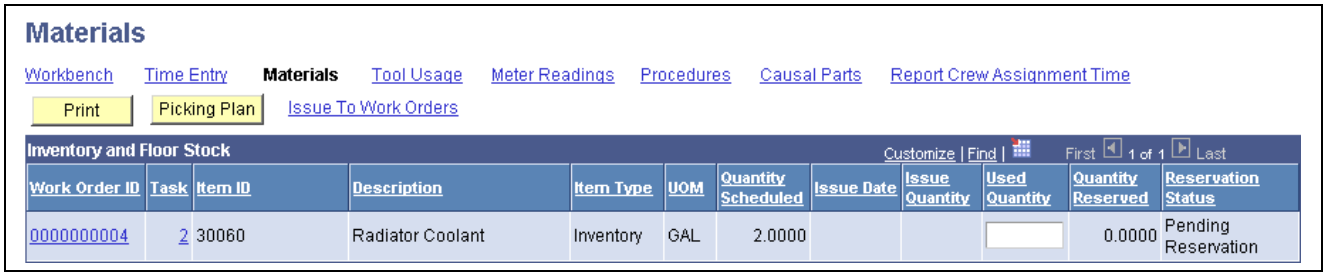
Distributions

Click the Distributions tab, which displays the ChartField distributions that are associated with the resource line. If this a new resource line (actuals entries only), then the distributions are derived form a distribution template. You can override these values, if necessary.

Entering Materials

Access the Materials page.



Materials page

Print Click this button to print reports from the Work Order Task Report Options page.

Picking Plan Click this button to generate a picking plan for selected materials for PeopleSoft Inventory based on the predefined Picking Plan run control in User Preferences.

See Chapter 18, "Scheduling a Work Order," Assigning and Scheduling Inventory Resources for Work Order Tasks, page 485.

Issue to Work Orders Click this link to access the Issue to Work Order Search page, where you enter details to issue the item to the work order task. Once the item is issued, the Issue Date and Issue Quantity fields appear in the Inventory and Floor Stock grid.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Fulfilling Work Orders from Maintenance Management," Pages Used to Issue Items to a Work Order.

Inventory and Floor Stock

This grid displays each inventory item or floor stock item that were entered for the selected work order tasks.

Used Quantity Enter the quantity used of this item.

and **Delivery Instructions** Displays delivery instructions informing PeopleSoft Inventory which materials to deliver and where to. Delivery instructions along with the Delivered Y/N flag (displayed as a delivery truck icon) for materials are updated by the planner or scheduler to indicate where materials need to be delivered. These instructions might also include special handling instructions (such as fork lift needed). The Delivered Y/N flag indicates which materials are typically delivered to the work location. You can indicate how you want the materials delivered in the work order task's Inventory Schedules grid and the Purchase/On-Hand Schedules grid.

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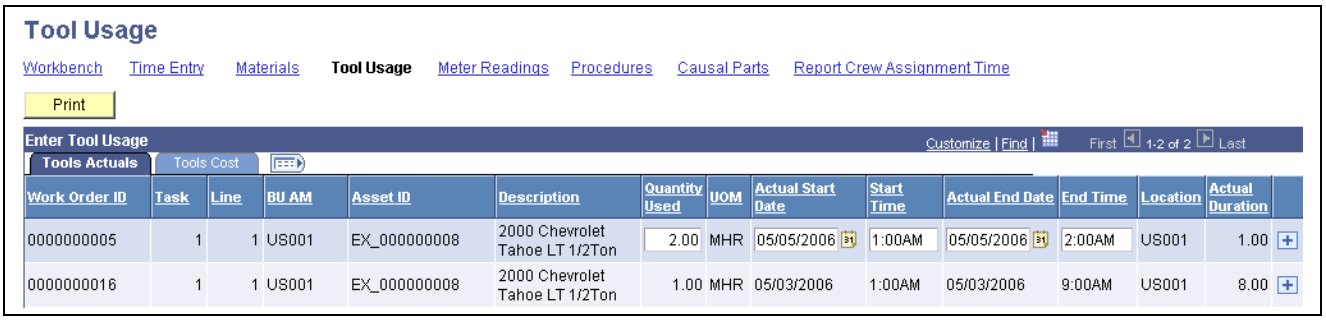
Entering Tool Usage

Access the Tool Usage page.



Tool Usage page

Asset ID Select or override the Asset ID (Serial ID, VIN, or Asset Tag Number) for the tool. A default value appears, if a value was selected in the work order task Tool Schedules grid. A description of the tool also appears. The selected asset must be flagged as a tool.

Note. For unplanned tool usage (tool requirements were not defined or scheduled), when you select this value, default values are applied to the Asset Type, Subtype, Manufacturer ID, and Model fields, if applicable. These fields are not visible from the Technician Workbench.

Quantity Used Enter the quantity used. For example, if the cost to use a truck is ten cents per mile, and the truck travelled 20 miles during the task, then the quantity used is the total number of miles (20) that the truck travelled for the task. This quantity is multiplied times ten cents per mile to arrive at the total cost of the tool usage (2.00 USD).

Actual Start Date, Start Time, Actual End Date, and **End Date** Enter the actual start and end dates and times in which the tool was used for a work order task.

Actual Duration Displays the actual duration of the task based on the actual start dates and time values converted to hours divided by the Quantity Used value. This calculation depends on the UOM that applies to the tool.

Tools Cost

Access the Tools Cost grid of the Tool Usage page.

Tool Cost Rate and Tool Override the default Tool Cost Rate and Tool Bill Rate values as necessary. The default value is derived from the values entered on the Tool Rates page of the shop.

Transaction Date Override the default system date as necessary.

Distribution Click this link to access the ChartField distribution page for tools to be processed in PeopleSoft Project Costing.

Entering Meter Readings

Access the Meter Readings page.

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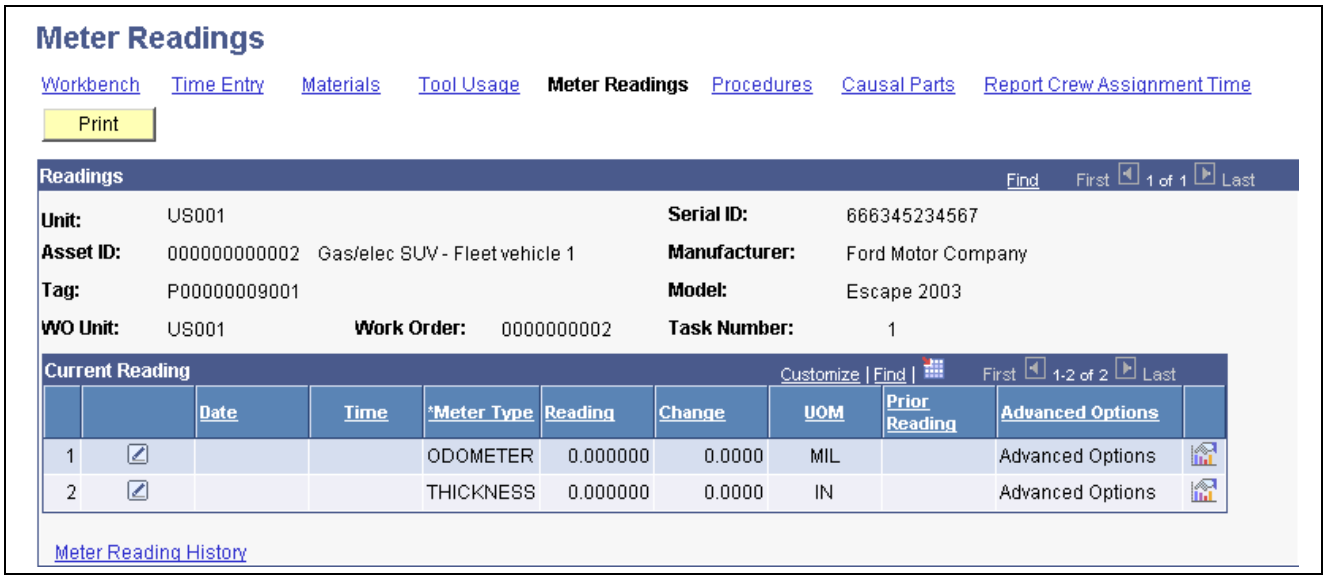

Technician Workbench - Meter Readings page

Technicians update an asset's meter readings to reflect usage information.

	Click this icon to activate the fields in a row of the Current Reading grid.
Date and **Time**	Enter the date and time of the meter reading for the work order task's asset.
Meter Type	Select the type of meter from which you took the reading, such as an odometer.
Reading and **UOM** (unit of measure)	Enter the meter reading. The UOM value is determined by the asset and the type of meter that you select.
Change	If a prior meter reading exists, the difference between the current reading and the prior reading displays in this field.
Prior Reading	This value displays if there was a prior meter reading in the PeopleSoft Asset Management Meter Reading History for the selected meter and asset.
Advanced Options	Click this link to access the Advanced Options page.
	Click this icon to access the Meter Readings Trend Chart.

Advanced Options

Access the Advanced Options page.

Rollover	Select this check box only if this is the first meter reading performed after a rollover.
Replaced	Select this check box only if this is the first meter reading performed after the replacement of the meter. For example, if a new odometer was installed in a company car. If you select this check box, you must enter the Accumulated Reading.
Accumulated Reading	Enter a value in this field if you selected Replaced. You must enter the previous reading on the old meter to track the actual overall mileage.

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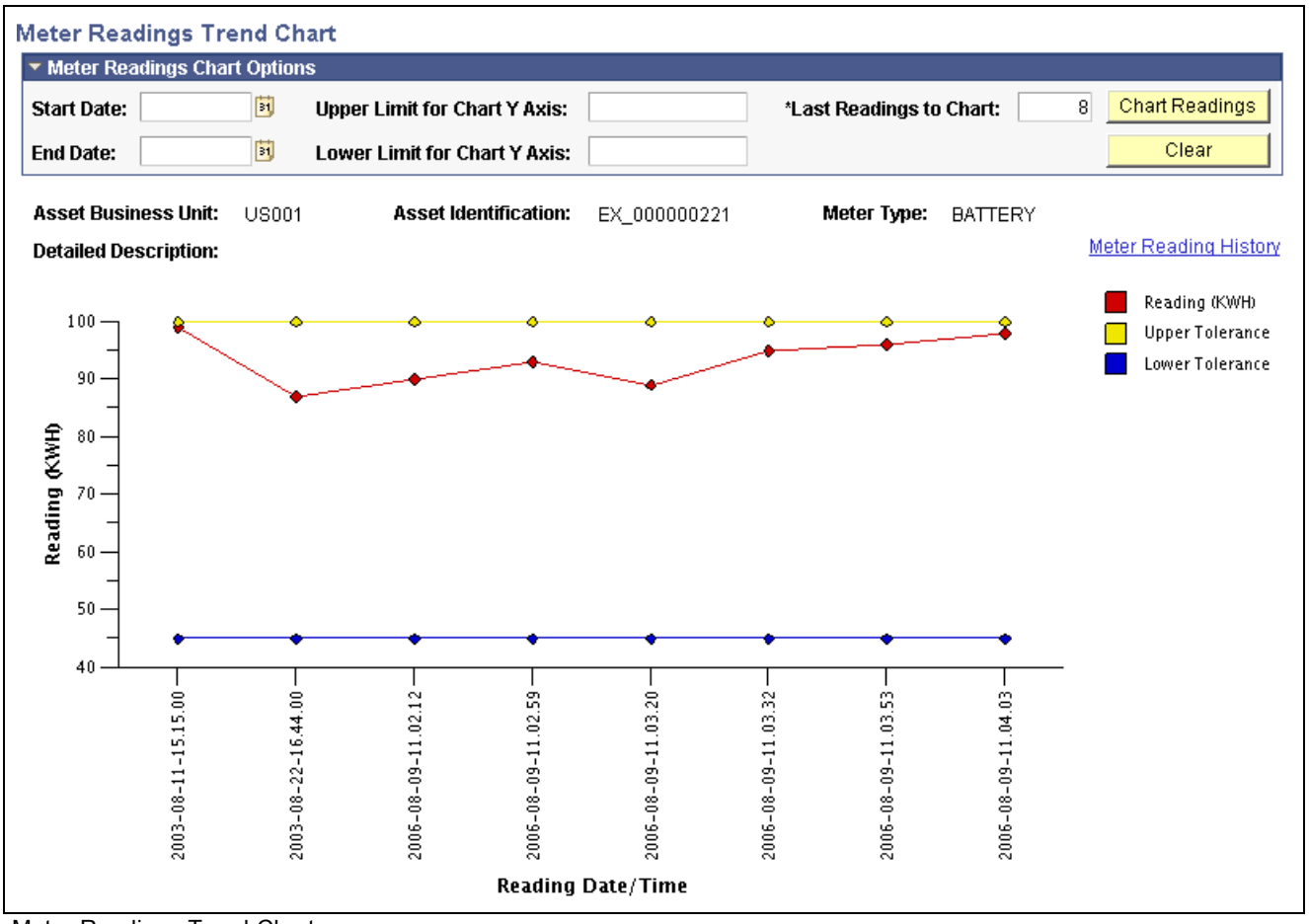
The Meter Readings Trend Chart

Access the Meter Readings Trend Chart:



Meter Readings Trend Chart

Start Date	Select the beginning date for the meter readings that you want to appear on the Meter Readings Trend Chart.
Upper Limit for Chart Y Axis	Enter the upper limit (Readings/KWH) that you want to appear on the Y axis of the Meter Readings Trend Chart.
End Date	Select the last date for the meter readings that you want to appear on the Meter Readings Trend Chart.
Upper Limit for Chart X Axis	Enter the upper limit (Reading Date/Time) that you want to appear on the X axis of the Meter Readings Trend Chart.
Last Readings to Chart	Indicates the total number of readings that appeared on the chart starting with the latest readings.
Chart Readings	Click this button to display the Meter Readings Trend Chart based on the values you entered for the Meter Readings Chart Options.
Clear	Click this button to clear the Meter Readings Chart Options fields.

This chart compares the meter readings that were read on the odometer of this vehicle every 200 miles, and each date and time the meter readings were taken. This chart shows the miles

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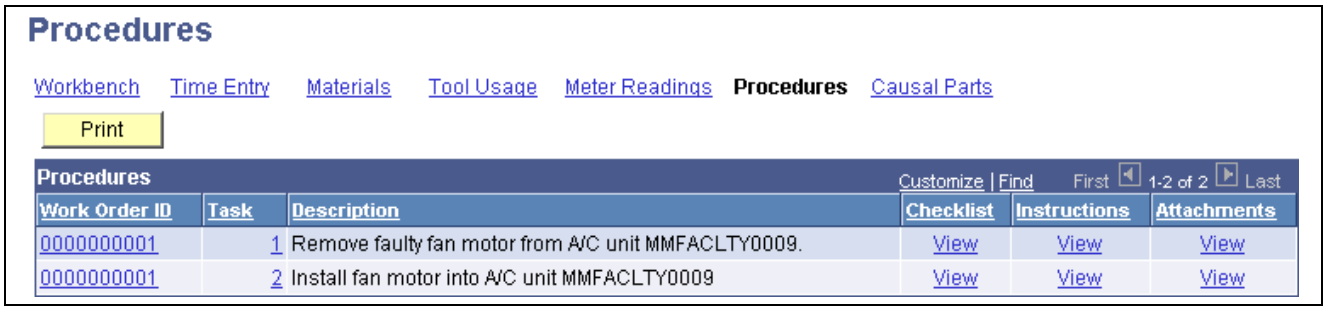
Reviewing Procedures

Access the Procedures page.

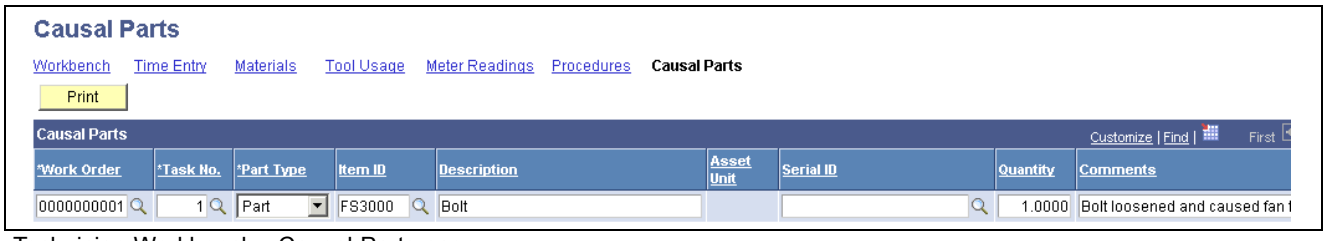


Technician Workbench - Procedures page

Checklist, Instructions, and **Attachments** Enables you to either access the checklist, instructions, and attachments pages associated with the work order task. You can also access the task and add instructions or checklist items via the Work Order Component. You must call up the task again to access the View links for any additional procedures that you added to the task.

Entering Causal Parts

Access the Causal Parts page.



Technician Workbench - Causal Parts page

Part Type Select if this causal part is either an inventory item, an asset, or a description.

- *Part*

  If you select this value, then the inventory Item ID field is enabled so that you can select the item that caused the problem.

- *Asset*

  If you select this value, then the Asset Unit and Asset ID fields are enabled so that you can select the asset that caused the problem.

Quantity Enter the number of parts or assets that caused the problem.

Reporting Crew Assignment Time

Access the Report Crew Assignment Time page:

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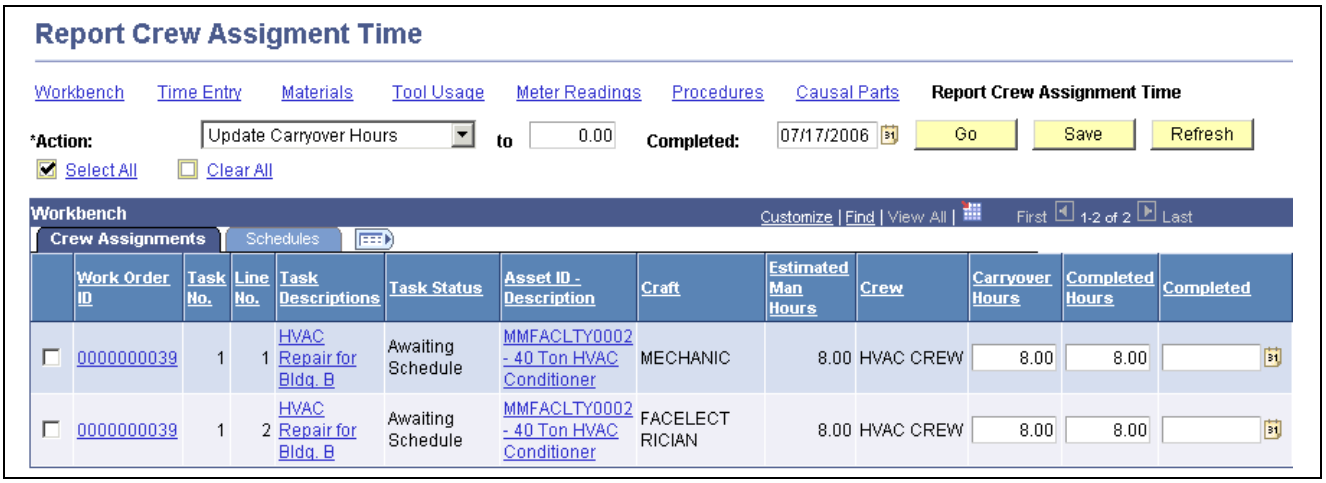
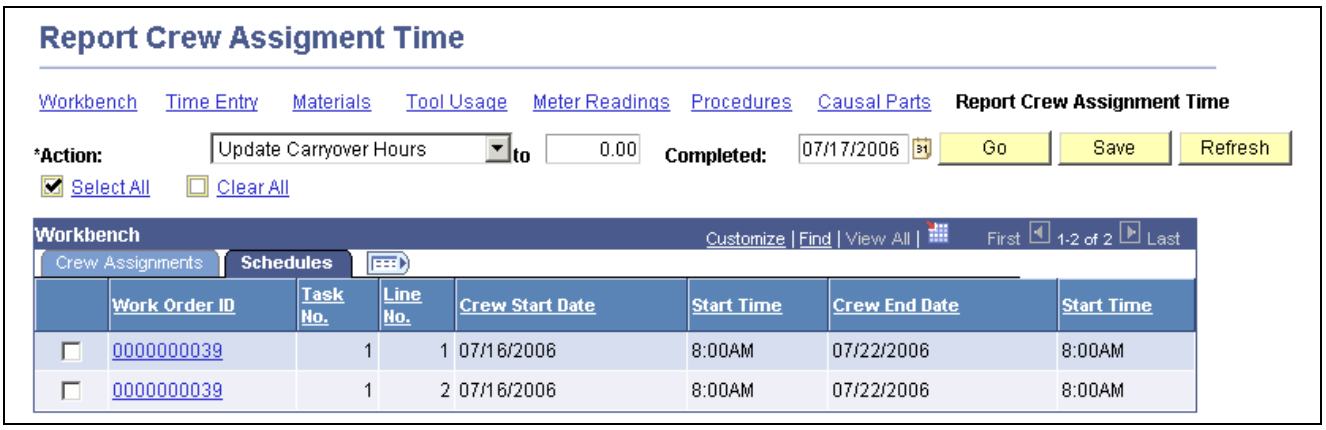


Report Crew Assignment Time page - Crew Assignments tab



Report Crew Assignment Time page - Schedules tab

Action

Select the rows that you want to affect with this action and then select one of these actions:

- *Report Completed Date.*

  Selecting this value displays a date field in which you can select the date the selected work order task row was completed.

  Select the Go button to execute the action and update the rows.

- *Update Carryover Hours.*

  Selecting this value displays the following fields.

  - To.

    Enter the number of carryover hours to update the selected rows.

  - Completed.

    The date the work was completed displays in this field. You can override this date.

    Select the Go button to execute the action and update the rows.

- *Update Completed Man Hours.*

  Selecting this value displays a To field on which you can enter the completed man hours for the selected rows.

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Select the Go button to execute the action and update the rows.

Crew Assignments Tab

Access the Crew Assignments tab on the Report Crew Assignment Time page.

Work Order, Task No, Task Line, Task Descriptions, Task Status, Asset ID, Craft, Estimated Man Hours, and **Crew** — The field values for each row are derived from the work order and the Crew Scheduling Workbench.

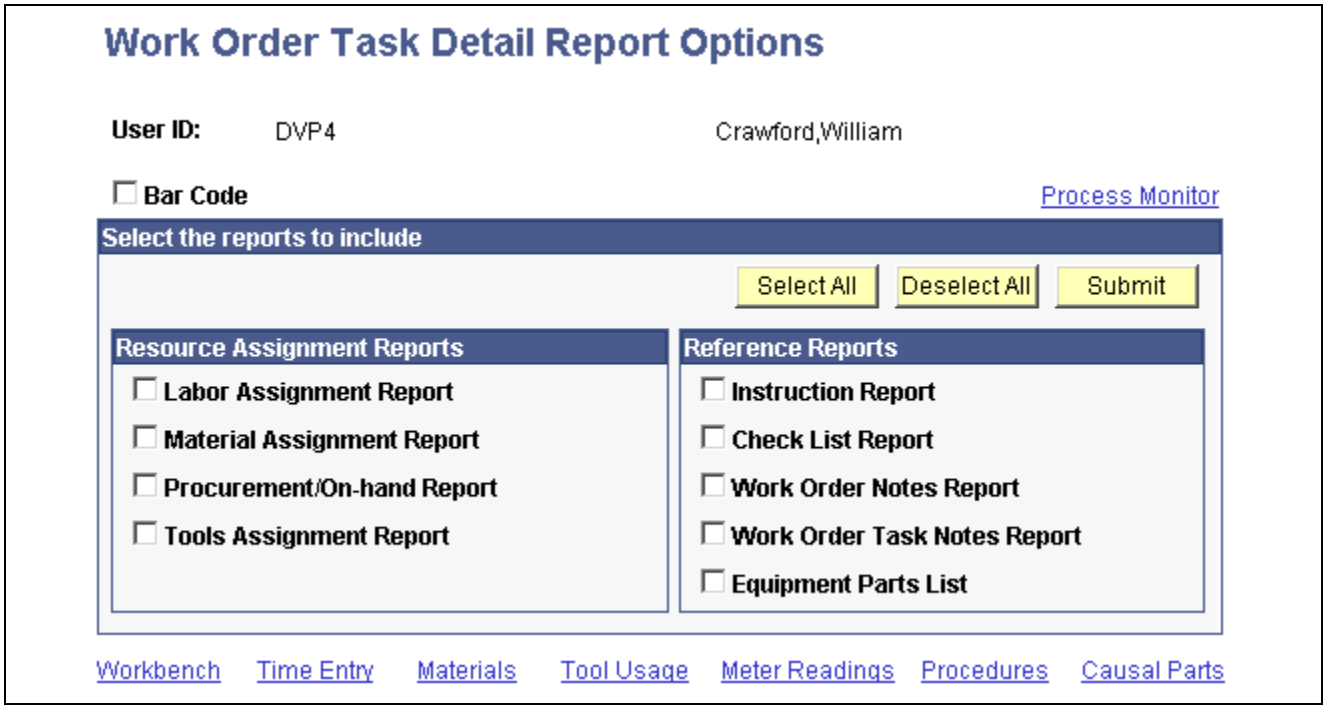
Carryover Hours — Displays the carryover hours in this field. If you enter a completed date , the carryover hours are zeroed out. You can enter a value on each row, or you can update the carryover hours for one or more selected rows by selecting action, *Update Carryover Hours* action.

Completed Hours — Enter the number of hours of work completed for each row. You can also select the row and select the *Update Completed Man Hours* action to update one or more selected rows at the same time.

Completed — Select the date on which the completed hours were completed for each row. You can also select one or more rows and select the *Report Completed Date* action to perform this activity. When this field is entered, the Carryover Hours in the row will be set to zero.

Printing Work Order Tasks Detail Reports

Access the Work Order Task Detail Report Options page.



Work Order Task Detail Report Options page

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Bar Code Select this field to print work order information such as the work order business unit, the work order ID, the task ID, and the resource line number for materials in bar code format for selected reports. For inventory items, the barcode is printed on the Scheduled Materials section. The storeroom clerk can then scan a resource line directly from the materials list and match it with the items committed to the work order task.

Staging Time Entries

This section discusses how to stage time entries.

To stage time entries use the Stage Time Entries (RUN_EXTRNPRC_WM) component.

Pages Used to Stage Time Entries

Page Name	Object Name	Navigation	Usage
Stage Time Entries	RUN_EXTRNPRC_WM	Maintenance Management, Work Order Management, Work Order Processing, Stage Time Entries.	Stage time entries for PeopleSoft Project Costing processing.
Selected Business Units	RUN_EXTRNPRC_BU	Click Selected Business Units tab.	Select business units associated with the time entries.
List	PSRF_REPORTS_CHRON	Click the Report Manager link.	List generated reports.
Explorer	PSRF_REPORT_VIEWER	Click the Explorer tab.	Display selected report.
Administration	CDM_CONTLIST	Click the Administration Tab.	Review attributes of listed reports.
Archives	CDM_CONTLIST_ARCH	Click the Archives tab.	Review archived reports.
Process List	PMN_PRCSLIST	Click the Process Monitor link in the Stage Time Entries component.	View the status of processing jobs.
Server List	PMN_SRVRLIST	Click the Server List tab.	View and access servers.

Staging Time Entries

Access the Stage Time Entries page.

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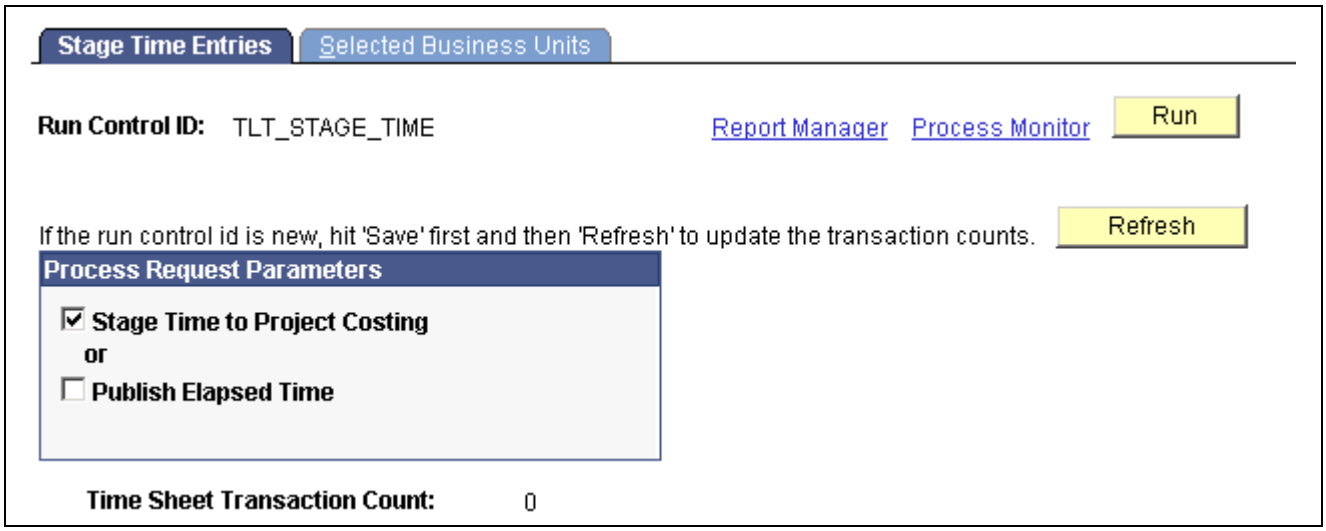

Stage Time Entries page

Stage Time to Project Costing Select this check box to stage the time entries, which were entered and submitted in the Technician Workbench component for processing in PeopleSoft Project Costing.

Publish Elapsed Time Triggers an application message that publishes elapsed time reporting data to Time and Labor. This option is checked when a user has PeopleSoft Enterprise HRMS and PeopleSoft Enterprise Time and Labor.. The time sheet data will be sent to Time and Labor if they choose to run it and the data will be processed as normal time entries without specifying the association with work order.

Important! The work order information is not carried over to Time and Labor.

Selected Business Units

Access the Selected Business Units page and select one or more business units that are associated with the time entries that you want to stage.

Expediting Work Order Completion

This section discusses how to use the Work Order Completion component.

Understanding the Work Order Completion Component

The Work Order Completion component enables you to expedite the entry of labor time, inventory usage and returns, and tool usage for the tasks associated with a selected work order. You can also change the status of each task associated with the selected work order, enter the actual start and end dates and times of the selected work order, and enter or update PCR data for the work order. Work orders must be approved before you can enter time for them.

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To submit a time sheet for posting in the Work Order Completion component, you must set up the Time sheet Default page for each shop associated with the resources for which you are entering time. The time sheet prefix is used to determine which time sheet transactions can bypass Time and Expenses and go directly to the staging tables for Project Costing. The time sheet prefix combined with the time sheet ID is a unique number. The PeopleSoft Payables staging table indicates when a row is directly populated from PeopleSoft Maintenance Management.

- Labor time.

  You enter the actual start and end dates and times for every technician assigned to any of the tasks associated with the selected work order in the Technician Workbench. You can also add and remove unscheduled time entry rows to each task. After creating these entries, if authorized, you can select the Submit For Posting button. The system automatically stages the transactions in the PeopleSoft Payables staging tables until Cost Collection for PeopleSoft Payables is run in PeopleSoft Project Costing, which collects the time information for each resource and stores it in the PROJ_RESOURCE table. The PeopleSoft Project Costing cost collection process also performs pricing on the time data. You must run the Cost Summarization process to see these actual labor costs updated in the Costs page of the work order.

  Note. There is no time limit for entering time on the Work Order Completion component.

  Important! Labor time entered on the Work Order Completion component cannot be updated on the Technician Workbench Time Entry page, and labor time entered on the Technician Workbench Time Entry page cannot be updated on the Work Order Completion component. Also, selecting the option to enter Elapsed Time or Punch Time on the User Preferences, Maintenance Management page does not apply to the Work Order Completion component.

  See Chapter 21, "Executing and Completing Work Orders," Understanding the Work Order Completion Component, page 622.

- Tools usage.

  You can the click the Tool Usage link on the Work Order Completion page to access the Tool Usage page, where you can enter the actual start and end dates and times for tool usage on each of the tasks associated with the selected work order. The transaction processing for these entries is the same as it is for the Technician Workbench.

  See Chapter 21, "Executing and Completing Work Orders," Understanding the Work Order Completion Component, page 622.

- Material usage and return.

  You can click the Materials link on the Work Order Completion page to access the Materials page, where you can enter the quantities of inventory items used for each work order task in the selected work order. This grid also indicates the quantity of the item that was reserved and the reservation status of each item. You can also create a picking plan for selected items.

  If more inventory materials are needed for the tasks associated with the selected work order, you can click the Issue to Work Orders link on the Materials page to enter a direct issue in PeopleSoft Inventory for the unscheduled items, if the user has access to the Issue to Work Orders component. PeopleSoft Inventory creates an issue transaction, which updates one or more Inventory lines for a task in the work order.

  You can also click the Print button and add a bar code and print the following reports:

  - Labor Assignment Report
  - Material Assignment Report
  - Procurement/On-Hand Report

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- Tools Assignment Report
- Instruction Report
- Check List Report
- Work Order Task Notes Report
- Equipment Parts List

See Appendix C, "PeopleSoft Maintenance Management Reports," page 673.

- Meter Readings

  If this is a preventive maintenance work order where the asset is based on meter readings, you can click the Meter Readings link and access the Meter Readings page. You can update the current meter readings of meters associated with the asset and click an Advanced Options link to the meter's details, such as the accumulated reading . You can also click a link to access the Meter Reading History in PeopleSoft Asset Management and view a Meter Reading trend chart.

- Causal Parts

  You can click on the Causal Parts link and enter any assets or item parts that caused each task in the selected work order to be opened. This information does not update a Warranty Claim created in the work order.

You can access the checklist associated with each task to mark the steps as complete. You can review and modify any existing notes and enter, if authorized, planned and actual downtime for the asset being maintained or repaired.

Note. You cannot perform prior period adjustments on the Work Order Completion component.

Pages Used to Expedite Work Order Completion

Page Name	Object Name	Navigation	Usage
Work Order Completion	WM_WO_ACT	Maintenance Management, Work Order Management, Work Order Completion	Enter data to complete a work order.
Tool Usage	WM_TLS_USAGE	Click the Tool Usage link on the Work Order Completion page.	Enter actual tool usage for a work order.
Materials	WM_WOE_MTLS	Click Materials link on the Work Order Completion page.	Enter the quantities of materials used for each work order task and issue materials as necessary.
Meter Readings	WM_WOE_METER	Click the Meter Readings link on the Work Order Completion page.	Enter the meter readings for the asset associated with the work order.
Causal Parts	WM_WOE_CAUSAL_PART	Click the Causal Parts link on the Work Order Completion page.	Enter the parts that caused the problem addressed in the work order.
Mass Change	WM_WOE_MASS_SEC	Click the Mass Change button on the Work Order Completion page.	Update the actual dates and times and the PCR codes for each of the work order tasks.

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Page Name	Object Name	Navigation	Usage
Checklist	WM_WOE_CKLST	Click the Checklist link on the Work Order Completion page.	Identify items listed on the checklist and make them as completed.
Work Order Task Notes	WM_TSK_NOTES	Click the Notes link on the Work Order Completion page.	Review and add notes associated with the work order task.
Downtime Entry	WM_WO_DOWNTIME	Click the Asset Downtime link on the Work Order Completion page.	Enter actual asset downtime.
Asset Information	WM_WO_ASSET_SEC	Click the Asset Details link on the Work Order Completion page.	Review detailed information about the asset.
WO Issue Search	IN_WO_ISS_SEARCH	Click the Issue to Work Orders link on the Materials page.	Select a pick plan and/or enter a work order ID as search criteria.
WO Issue Location	IN_WO_ISS_LOC	Click the WO Issue Location tab.	Enter the parts quantity issued and the quantity returned.
WO Issue Summary	IN_WO_ISS_SUMMARY	Click the WO Issue Summary tab.	Review the total quantities requested, reserved, allocated, and issued.
Labor Distributions	WM_LBRACT_DIST_SEC	Click the Distributions link on the Work Order Completion page, Labor Actuals, Distributions tab.	Review or modify the Labor Distributions ChartFields.

Using the Work Order Completion Component

Access the Work Order Completion page.

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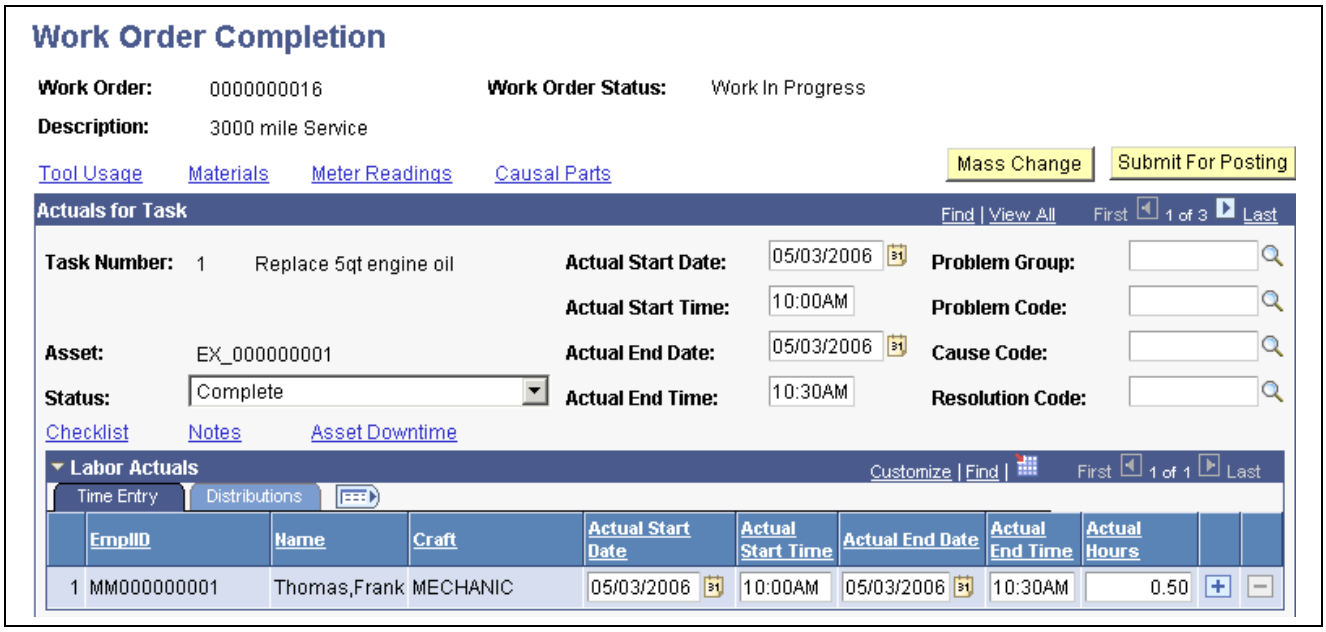

Work Order Completion page

Tool Usage Click this link to access the Tool Usage page and enter actual tool usage for this work order task.

See Chapter 21, "Executing and Completing Work Orders," Entering Tool Usage, page 615.

Materials Click this link to access the Materials page and enter actual quantities of items used. You can also click on the Issue link to issue additional materials to the work order or enter returned items.

See Chapter 21, "Executing and Completing Work Orders," Entering Materials, page 614.

Meter Readings Click this link to access the Meter Readings page and enter the current meter readings for the asset.

See Chapter 21, "Executing and Completing Work Orders," Entering Meter Readings, page 615.

Causal Parts Click this link to access the Causal Parts page and enter any assets or asset components that caused the task problem.

See Chapter 21, "Executing and Completing Work Orders," Entering Causal Parts, page 618.

Mass Change Click this button to access the Mass Change page in which you can update the actual start dates and times and/or the PCR values for all the work order tasks.

See Chapter 21, "Executing and Completing Work Orders," The Technician Workbench, page 597.

Submit for Posting Click this button to submit the time entries for posting in PeopleSoft Payables. Only users who have the Allow Submit Time for Posting check box selected on the User Preferences - Maintenance Management page can access the Submit for Posting button.

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Note. Once you submit the timesheet directly to the staging tables for Project Costing from the Work Order Completion component, you cannot modify the data posted data. If you need to make adjustments, then you must enter a new line of labor data with the corresponding positive or negative adjustment.

See Chapter 21, "Executing and Completing Work Orders," Expediting Work Order Completion, page 622.

Status Select the status to which you want to change the status. Only authorized users can change the status to Complete or Closed. The status rules for the work order apply to this component.

See Chapter 7, "Setting Up Statuses for Service Requests and Work Orders," Understanding Service Request and Work Order Statuses, page 139.

Checklist Click this link to access the Checklist page and select completed tasks on the checklist.

See Chapter 21, "Executing and Completing Work Orders," Procedures, page 604.

Notes Click this link to access the Work Order Task Notes page, where you can review existing task notes and add new notes.

See Chapter 21, "Executing and Completing Work Orders," Reviewing Procedures, page 618.

Asset Downtime Click this link to access the Downtime Entry page, where you can enter the planned and actual downtime of the asset. You can also click a link to access the Asset History page from this page.

See Chapter 14, "Creating a Work Order," Asset Downtime, page 373.

Actual Start Date and **Actual Start Time** and **Actual End Date** and **Actual End Time** Enter the actual start and end dates and times for the work order task.

Problem Group and **Problem Code** and **Cause Code** and **Resolution Code** Select a problem group and PCR codes for this work order task, if applicable.

Mass Changes

Update Actual dates and Times Click this check box to activate the actual start and end dates and times fields. Enter the new task actual start dates and times to apply to all of the work order tasks that are not closed or canceled.

Update P-C-R codes Click this check box to activate the Problem Group, Problem, Cause, and Resolution fields. Enter the values to apply to all of the work order tasks that are not closed or canceled. If you change the any of the PCR fields, the fields that follow the changed field in the hierarchy are blanked out and the PCR hierarchy becomes invalid.

See Chapter 6, "Setting Up Problem Cause Resolution Data and Problem Trees," Setting Up PCR Data, page 129.

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Labor Actuals Time Entry and Distribution

Access the Labor Actuals Time Entry tab on the Work Order Completion page.

Employee ID — Select a resource for whom to enter time. This field is available for resources that you add to the task. If labor is already scheduled for the work order task, an Employee ID displays in this field.

Craft ID — Select a craft for the resource. This field is available when you add a resource to the task. If labor is already scheduled for the work order task, a craft ID displays in this field. This field is defaulted if a Primary Craft for the resource is already specified.

Actual Start Date and **Actual Start Time** and **Actual End Date** and **Actual End Time** — Select the actual dates and times that each resource worked on the task. The actual start date and time must be less than or equal to the actual task end date and time. The actual end date and time must be greater than or equal to the actual task start date and time.

Duration — The actual number of hours the employee worked on the task. This is required in order to submit time for posting.

Distribution — Click this link on the Distributions tab to access the Distribution page that displays the distribution data defaulted into the labor schedule row. You can override these values.

Note. The Distributions tab does not appear on the page unless you select the View and Update Accounting check box on the User Preferences - Maintenance Management page for selected users.

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CHAPTER 22

Closing Service Requests, Work Order Tasks, and Work Orders

This chapter provides an overview of service request and work order close in Oracle's PeopleSoft Enterprise Maintenance Management and discusses how to:

- Run WM_CLOSE for service requests, work order tasks, and work orders.
- Run the Cost Summarization process.

Understanding Service Request and Work Order Close

This section discusses:

- Service request close.
- Work order task close.
- Work order close.

Service Request Close

Employees and non-employees can create service requests using a self-service page, or an agent can create a service request for a requester based on the agent's knowledge of an existing problem. Once either a requester or the agent creates a service request:

- The agent can send a technician to resolve an easy problem without a work order, such as adding toner to a printer or moving one piece of furniture in an office, or the agent can resolve a problem, such as changing a user's ID.

  Once the agent or technician resolves this type of service request, the agent adds a note about the work performed, changes the status to complete, and saves the page, which automatically sends an email informing the requester that the service request is complete and that the request will be closed in *N* days. The number of days until the service request is closed (*N* days) is set up in the service request business unit Definition page. The requester can:

  - Click the link in the email to access the self-service service request update page and reopen the service request.
  - Manually change the status of the service request to closed.

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- Allow *N* days to pass and the system closes the service request automatically.

Note. All service requests with a status of complete are closed automatically whenever the Work Order Close batch process is run on the date the number of close days expires for the service request (the process must be run with the Transaction Type field set to *All* or *Service Request*). Typically, the Work Order Close process is run once or twice a day depending on volume.

- If the agent cannot easily resolve the problem, the agent can create a work order to resolve it.

  When either the technician or the agent changes the status of the work order to complete:

  - A notification is sent to the requester providing a summary of work performed and the number of days before the service request automatically closes.
  - If the requester reopens the service request within the allowable number of days before the close, the agent can close the service request and create a new service request and a new work order.

For example, the value in the Days to Close field is *20* for service request business unit SRBU1 and the following service requests are marked complete on the dates in the following table:

Service Request	Completion Date	Service Request automatically closes on:
SR001	01/01/2005	21st January 2005 **Note.** The requester or agent can manually close this service request on or before this date.
SR002	01/10/2005	30th January 2005 **Note.** The requester or agent can manually close this service request on or before this date.
SR003	12/31/2004	19th January 2005 **Note.** The requester or agent can manually close this service request on or before this date.

Once a service request is canceled or closed, the fields in the service request are display only.

Closing of Work Order Tasks and Work Orders

Once a user changes the status of a work order task to complete, then the user can close the task. To close a work order task:

- An authorized user can manually change the status of the task from Complete to Closed, based on the established Maintenance Management page in User Preferences.

  This status marks the task for closure so that when you run the Work Order Close process (WM_CLOSE), the system ignores the Close Days (grace period) in the work order business unit or work order type and closes the task. If chargebacks are associated with the task, the system runs an edit to ensure that a project activity owning organization is specified.

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Note. This setup in User Preferences - Maintenance Management only determines whether a specific user can set the work order task to complete or close. It does not prevent a user from running the batch Work Order Close process. You must set up PeopleTools Security if you want to prevent a user from running the batch Work Order Close process.

- When you run the Work Order Close (WM_CLOSE) batch process, the system automatically closes a task with a status of Complete after the expiration of the close days (grace period) specified in the work order business unit or the work order type. If no activity occurs against the work order task based on the defined close days, then the task is subject to closing.

  For example, if the close days interval is 10 and the completion date of the task is July 1, 2005, then the Work Order Close batch process automatically closes the task after 10 days when you run Work Order Close (WM_CLOSE) process. If other tasks are open for the work order, the process only closes the one task and leaves the others open. When all the tasks are closed, then the work order is closed when you run the Work Order Close (WM_CLOSE) batch process.

- The user runs the Work Order Close batch process (WM_CLOSE) for the work order, which closes all tasks associated with the work order as long as they have a status of complete and the number of close days (grace period) has expired.

When you manually change the status of a work order task to Close, you can no longer add any costs to the work order task in feeder systems such as PeopleSoft Purchasing, PeopleSoft Payables and PeopleSoft Inventory.

For example, you can no longer create a purchase order from the work order task or create a purchase order directly from PeopleSoft Purchasing and associate it with a work order task once the work order task is closed. However, if you created existing purchase orders or requisitions before changing the status of the task to Complete and PeopleSoft Purchasing has not processed them, then these purchase orders and requisitions can continue to process the costs. This condition remains true for any work order task transactions that reside in any of the subsystems associated with PeopleSoft Maintenance Management.

Work Order Close (WM_CLOSE) Batch Processing

When you run the Work Order Close (WM_CLOSE) batch process:

- The process triggers the Cost Summarization process, which summarizes the actual costs for labor, materials, and tools for the work order and each work order task based on the work order task and displays them in the Cost page of the work order.

  See Chapter 21, “Executing and Completing Work Orders,” Understanding Work Order Execution, page 595.

  See Chapter 22, “Closing Service Requests, Work Order Tasks, and Work Orders,” Understanding Cost Summarization, page 635.

- The process updates the asset maintenance costs and the total asset downtime hours, which is a total of all the downtime entered in the work order task in PeopleSoft Asset Management Maintenance History.
- The process applies project activity asset integration rules for work order managed projects; these rules include:
  - Evaluating the capitalization limit specified for each work order task to determine if the dollar amount is subject to capitalization.
  - Updating the asset integration rules and retirement rules in PeopleSoft Project Costing, including filters, for asset capitalization and retirement.
- The process applies chargeback rules for tasks associated with work order managed projects; these rules include:

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- Validating the project activity owning organization information is entered in the work order task if the work order tasks are marked for chargeback.
- Updating the distribution status for the work order task rows in PeopleSoft Project Costing to enable these rules to be available for chargeback accounting generation if applicable.

  You must close a work order task to generate chargeback accounting entries.

Note. If an asset is not associated with a work order task, then the process does not update PeopleSoft Asset Management.

You can only close a work order if the status of each of the work order tasks associated with the work order is closed or canceled. If any work order tasks are incomplete, the process does not close the work order. If technicians with pending time sheets are assigned to a work order task, the process does not close the work order task. Work order tasks that are associated with an asset require a defined maintenance type.

Note. Standing work orders are an exception to this rule. You select a check box in the Miscellaneous page of the work order to identify that the work order is a standing work order.

See Chapter 14, "Creating a Work Order," Using the Work Order - Miscellaneous Page, page 404.

Capitalization Processing for Work Order Tasks

If a work order task is associated with a work order managed project, the Work Order Close process (WM_CLOSE) verifies that an asset is associated with the work order task and that the task is set up for asset capitalization in the PeopleSoft Maintenance Management Task Accounting page. If the currency specified for the asset in PeopleSoft Asset Management is different that the currency specified in the work order business unit, the Work Order Close (WM_CLOSE) converts the cost from the currency specified in PeopleSoft Maintenance Management to the cost for currency specified in the Asset Management business unit. The process checks the capitalization limit on the work order task. Based on the capitalization limit, if the task is eligible for capitalization, the process selects (activates) the Capitalization Switch for the PeopleSoft Project Costing project activity that is associated with in the work order task and also updates the Filter ID with the capitalization filter selected for the work order task in the PeopleSoft Maintenance Management Task Accounting page. However, the Work Order Close process (WM_CLOSE) does not run the Capitalization process. The Capitalization process is run separately in PeopleSoft Project Costing, Assets, Express Capitalization Process. Once this process is run, you must run the Cost Summarization process to view the capitalization costs in the PeopleSoft Maintenance Management, Inquiries and Reports, Capitalization inquiry.

Important! PeopleSoft Project Costing only capitalizes financial assets.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Managing Assets".

Chargeback Processing for Work Order Tasks (WO Managed Only)

During the execution of a work order task that is associated with a work order managed project, each of the subsystems and the tools transactions in PeopleSoft Maintenance Management sends the labor, inventory, payables, and tools transaction costs to the PROJ_RESOURCE table. When the Project Costing Pricing engine prices a work order task transaction, the Pricing engine updates the GL_DISTRIB_STATUS in the PROJ_RESOURCE table to hold, which prevents the Project Costing Project Accounting engine from selecting these rows. When the Work Order Close (WM_CLOSE) process runs for a work order task, the process updates the GL_DISTRIB_STATUS to costed. The accounting engine can then pick up the costed rows to generate chargeback accounting entries to post in the PeopleSoft General Ledger. The costs are charged back to the organization indicated in the ChartField distribution row in PeopleSoft Maintenance Management.

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See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , “Pricing Project Costs,” Pricing Transactions Associated with Work Orders.

Retirement Processing for Work Order Tasks

When the Work Order Close process (WM_CLOSE) closes a work order task associated with a work order managed project that involves the retirement of the asset, then the process initiates the retirement cost flow. When you select the information for asset capitalization and chargebacks on the Work Order Task Accounting page, the information is updated on the project activity when the work order is closed.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , “Managing Assets,” Retiring Assets.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , “Integrating with Maintenance Management”.

Running WM_CLOSE for Service Requests, Work Order Tasks, and Work Orders

To close work orders, work order tasks, and service requests use the Close Work Order (WM_CLOSE_REQUEST) component.

This section describes how to close work orders, work order tasks, and service requests.

Page Used to Run the Close Process for Service Requests, Work Order Tasks, and Work Orders

Page Name	Object Name	Navigation	Usage
Close Work Order	WM_CLOSE_RQST	Maintenance Management, Work Order Management, Work Order Processing, Close Work Order	Close service requests, work order tasks, or work orders.

Closing Work Orders, Work Order Tasks, and Service Requests

Access the Close Work Order page.

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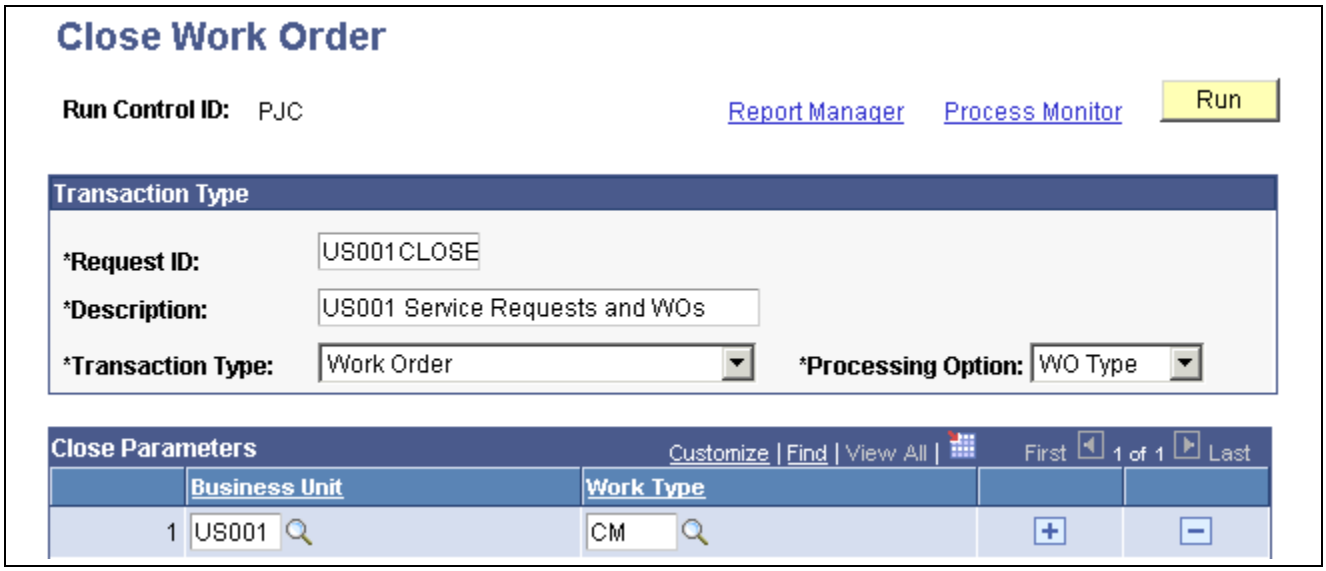

Close Work Order page

Transaction Type Select:

- *All (Work Order and Request)*

  Select this value for the value *All* to appear in the Processing Option field. This selection enables you to close all eligible service requests, work order tasks, and work orders.

- *Service Request*

  Select this value for the value *All* to appear in the Processing Option field. This selection enables you to close all eligible service requests.

- *Work Order*

  Select this value and select one of the Processing Options listed below to close all work orders that are eligible to close that fall within the selected processing option value.

Processing Option Select *Work Order* as the transaction type and then select:

- *All* to close all eligible work orders in the system.
- *Bus. Unit* (business unit) to display the Close Parameters group box.

  You can add and select one or more business units for which you want to close eligible work orders.

- *Group* to display the Close Parameters group box.

  You can add and select one or more business units and associate each business unit with a service group for which you want to close eligible work orders.

- *Shop* to display the Close Parameters group box.

  You can add and select one or more business units and associate each business unit with a shop for which you want to close eligible work orders.

- *Task* to display the Close Parameters group box.

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You can add and select one or more business units and associate each business unit with a work order ID and a task number that you want to close.

- *WO Type* (work order type) to display the Close Parameters group box.

  You can add and select one or more business units and associate each business unit with a work order type for which you want to close eligible work orders.

- *Work Order* to display the Close Parameters group box.

  You can add and select one or more business units and associate each business unit with a work order ID that you want to close.

Run Click this button to run the Work Order Close process (WM_CLOSE). Click the Process Monitor button to monitor the processing and click the *Report Options* button to access and manage any reports associated with the process.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Running the Cost Summarization Process

To run the Cost Summarization process, use the Cost Summarization (WM_SUMCOST_RUN) component.

This section provides an overview of cost summarization and discusses how to:

- Summarize costs.
- View the results of the Cost Summarization process in the work order.

Understanding Cost Summarization

The Cost Summarization process in PeopleSoft Maintenance Management enables you to see up-to-date actual costs whenever you need to in the Cost page of the work order. This process uses the Cost Collection application engine in PeopleSoft Project Costing to gather the labor, inventory, and purchasing actual costs (from PeopleSoft Payables), and tools, and it updates the Cost page of the work order. The actual costs for a work order are collected for the number of days you entered in the Days for Cost Collection field of the work order business unit after the work order is closed. The work order header, task, and all resource rows are updated with the task information. The Cost Summarization process also performs any currency conversions. In addition, if the capitalization process was run in PeopleSoft Project Costing for assets specified in the work order, then these costs appear on the Capitalization inquiry in PeopleSoft Maintenance Management when you run the Cost Summarization process.

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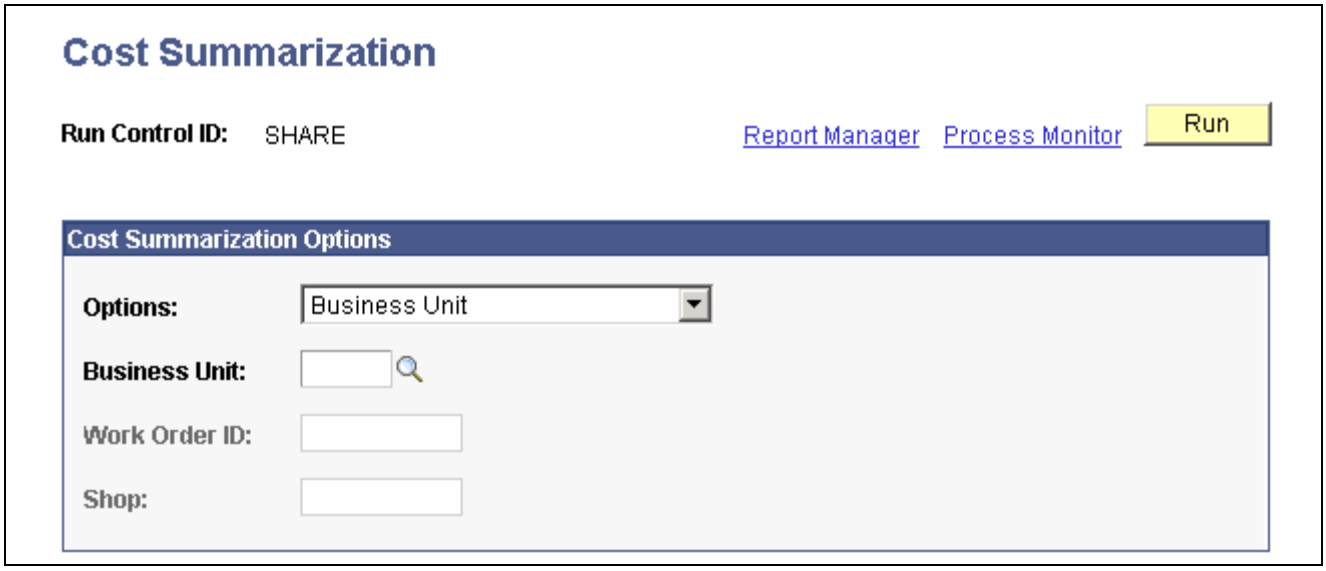
Pages Used to Run the Cost Summarization Process

Page Name	Object Name	Navigation	Usage
Cost Summarization	WM_SUMCOST_RUN	Maintenance Management, Work Order Management, Work Order Processing, Cost Summarization	Run the Cost Summarization process (WM_SUMMCOST) to update total actual costs generated in PeopleSoft Project Costing in the Cost page of the work order.
Work Order - Cost	WM_WO_COST	Select Maintenance Management, Work Order Management, Work Order, and click the Cost tab.	Review the total estimated, scheduled, and actual costs in a work order.

Summarizing Costs

Access the Cost Summarization page.



Cost Summarization page

Important! The Cost Summarization process updates only the actual costs for the work order. The estimated costs are based on the task resource requirements, and the scheduled costs are based on the scheduled resources.

Options

Select one of these options:

- *All* to summarize costs for all work orders and all shops associated with all business units.
- *Business Unit* to enable the Business Unit field, where you can select the work order business unit associated with the work orders for which you want to summarize costs.
- *Shop* to enable the Shop field, where you can select the shop associated with the work order for which you want to summarize the costs.

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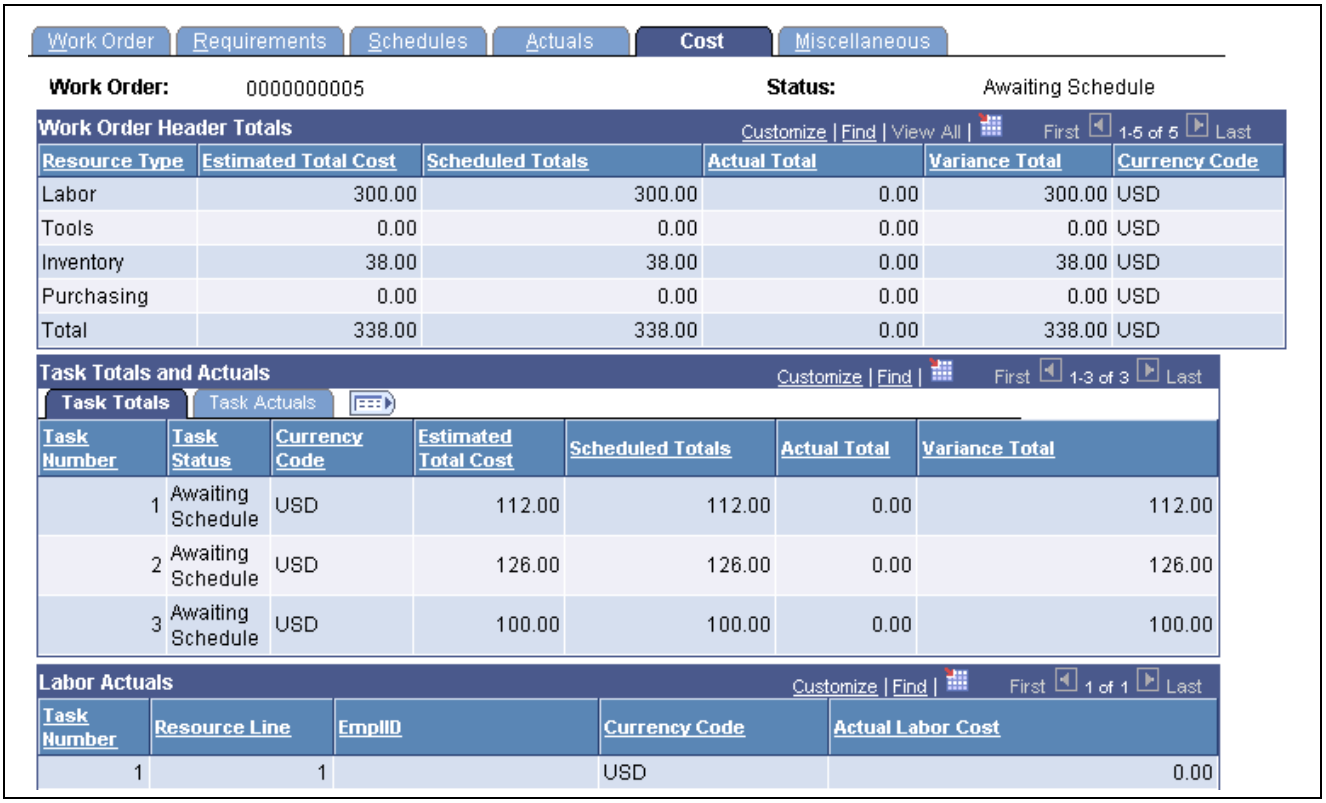
- *Work Order*to enable the Work Order ID field, where you can select the specific work order for which you want to summarize the costs.

Run Click this button to run the WM_SUMMCOST process.

Viewing the Results of the Cost Summarization Process in the Work Order

Access the Work Order - Cost page.



Work Order - Cost page

Work Order Header Totals

Estimated Total Costs Displays a value if you calculated estimated costs for each resource row for each task in the Requirements page. This value is updated when you save the work order requirements.

Scheduled Totals Displays a value if you calculated the scheduled costs for each resource row for each task on the Schedules page. This value is updated when you save the work order Schedules page.

Actual Total Displays a value when you enter the time, material, and tool usage amounts in the Technician Workbench. When you run the Cost Summarization process, the total costs are collected in PeopleSoft Project Costing, and they appear in these fields.

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Task Totals and Actuals

This grid displays the total estimated and scheduled costs for each work order task when you enter the resources lines and save the requirements for estimated costs and the schedules for scheduled costs. The total actual costs for each task are derived from PeopleSoft Project Costing when you run the Cost Summarization process and the variance is calculated. The system calculates a variance between the estimated costs and the actual costs.

Labor Actuals

This grid displays the total actual labor costs for each employee assigned to a work order task line. These costs appear based on running the Cost Summarization process. The Cost Summarization process is automatically run when a work order is closed.

Material Actuals

This grid displays the total actual inventory costs for each work order task line. These costs appear based on running the Cost Summarization process. The Cost Summarization process is automatically run when a work order is closed.

Purchasing Actuals

This grid displays the total actual purchasing costs for each work order task line. These costs appear based on running the Cost Summarization process. The Cost Summarization process is automatically run when a work order is closed.

Tools Actuals

This grid displays the total actual tool costs for each work order task line. These costs appear based on running the Cost Summarization process. The Cost Summarization process is automatically run when a work order is closed.

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CHAPTER 23

Reviewing PeopleSoft Maintenance Management Inquiries

This chapter presents an overview of Oracle's PeopleSoft Enterprise Maintenance Management inquiries and discusses how to:

- Use the Asset Maintenance History inquiry.
- Use the Work Order History inquiry.
- Use the Work Progress Tracking inquiry.
- Use the Purchasing and Pegging inquiry.
- Use the Chargeback inquiry.
- Use the Capitalization inquiry.
- Use Crew Schedule inquiry.

Important! The View Preventive Maintenance and View Projection Summary and Detail inquiries are described in "Setting Up and Generating Preventive Maintenance Work Orders".

Understanding PeopleSoft Maintenance Management Inquiries

PeopleSoft Maintenance Management provides the following online inquiries:

- Asset Maintenance History inquiry.

  The asset maintenance history inquiry displays the cost of maintenance for an asset. If the asset has a parent component, you can choose to roll up the child asset component cost to the parent asset.

- Work Order History inquiry.

  The work order history inquiry enables you to view the estimated and actual cost of maintenance by business unit and shops. You can use this information to examine maintenance costs, plan budgets, and define cost anomalies. This inquiry is also helpful in identifying the general percent variance on the work order cost spread out over business units and shops.

- Work Progress Tracking inquiry.

  Work progress tracking identifies which work order tasks are behind schedule. To determine if a work order task is behind schedule, the system calculates the difference between the scheduled end date and the actual end date, the scheduled start date and actual start date, both or either of those dates. This enables the users to identify which work order tasks are consistently behind schedule and why so that they can remedy the cause of delays.

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- Purchasing and Pegging inquiry.

  Use pegging to associate specific supply, purchase requisitions, or purchase orders with work order demand. This essentially reserves the supply for that specific work order. Users can review the inquiry to see if the supply is pegged and the work order to which it is pegged.

  When items are in short supply, organizations peg higher priority work order demands to specific supply to ensure that those demands are satisfied. This also enables the organization to schedule work orders more accurately. The purchasing and pegging inquiry also displays all of the associated requisitions and purchase orders that may exist for a given work order task.

- Chargeback inquiry.

  You use the chargeback inquiry to view costs that are generated based on work order transactions that are charged back to another general ledger business unit, department, account, and alternate account instead of the general ledger business unit that is specified in the work order business unit. The costs for labor, inventory and so on, goes through PeopleSoft Payables, PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Payables and are then sent to PeopleSoft Project Costing, which calculates the chargebacks based on specific rules defined. Then the costs are sent to the general ledger business unit, department, accounts, and alternate accounts, which is different from the general ledger business unit specified in the work order business unit.

  See Chapter 14, “Creating a Work Order,” Work Order Task Accounting, page 373.

- Capitalization inquiry.

  Capitalization costs inquiry enables you to view costs associated with maintenance and repairs in PeopleSoft Maintenance Management. Because the costs of these repairs can affect the value of the asset, you can set up rules in PeopleSoft Maintenance Management that flags specific assets so that PeopleSoft Project Costing applies certain rate types that look at the work order costs used to capitalize the asset. PeopleSoft Project Costing also generates capitalization costs.

- Crew Schedule Inquiry.

  Using the scheduled work inquiry users can view crew schedules using a date range. This inquiry enables users to search and view crew schedules across schedule periods, including all future and past schedules for a given crew. Users can drill down to the work order component to review parts availability, the requirements for each resource, and the work order resource schedules in detail.

Using the Asset Maintenance History Inquiry

This section discusses how to review asset maintenance history.

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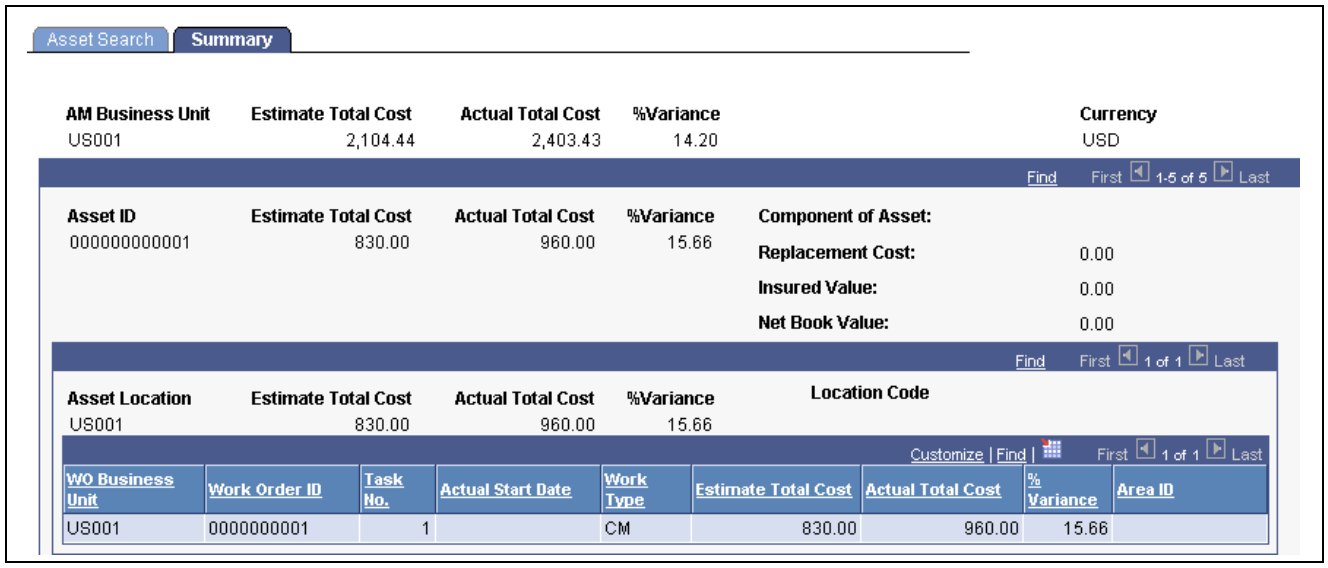
Pages Used to Review Asset Maintenance History

Page Name	Object Name	Navigation	Usage
Asset Search	WM_CINQ_ASSET	Maintenance Management, Inquiries, Asset Management Maintenance History, Asset Search	Search for assets associated with work orders.
Asset Maintenance History - Summary	WM_CINQ_ASSET_R1	Maintenance Management, Inquiries, Asset Management Maintenance History, Summary	Review the maintenance history of assets associated with work orders.

Reviewing Asset Maintenance History

Access the Asset Maintenance History - Summary page.



Asset Maintenance History - Summary page

Asset Search

Use the Asset Search page to search for a single asset using the Asset Search link or a group of assets based on the search criteria that you enter on this page.

Summary

The summary page displays the data associated with your search criteria. Whether you search for a single asset or a group of assets, the system displays a list consisting of a summary of the estimated total cost of repairs and maintenance associated with a work order ID and the total actual cost of maintenance and repairs associated with the asset. You can also view the replacement cost, insured value, and the net book value of that asset.

You can manually add maintenance entries in PeopleSoft Asset Management. The manual entries are not related to PeopleSoft Maintenance Management because a work order is not created for this maintenance. The overall cost includes all costs associated for both the entries that Maintenance manually entered in PeopleSoft Asset Management, and any work orders created for the asset in PeopleSoft Maintenance Management.

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Using the Work Order History Inquiry

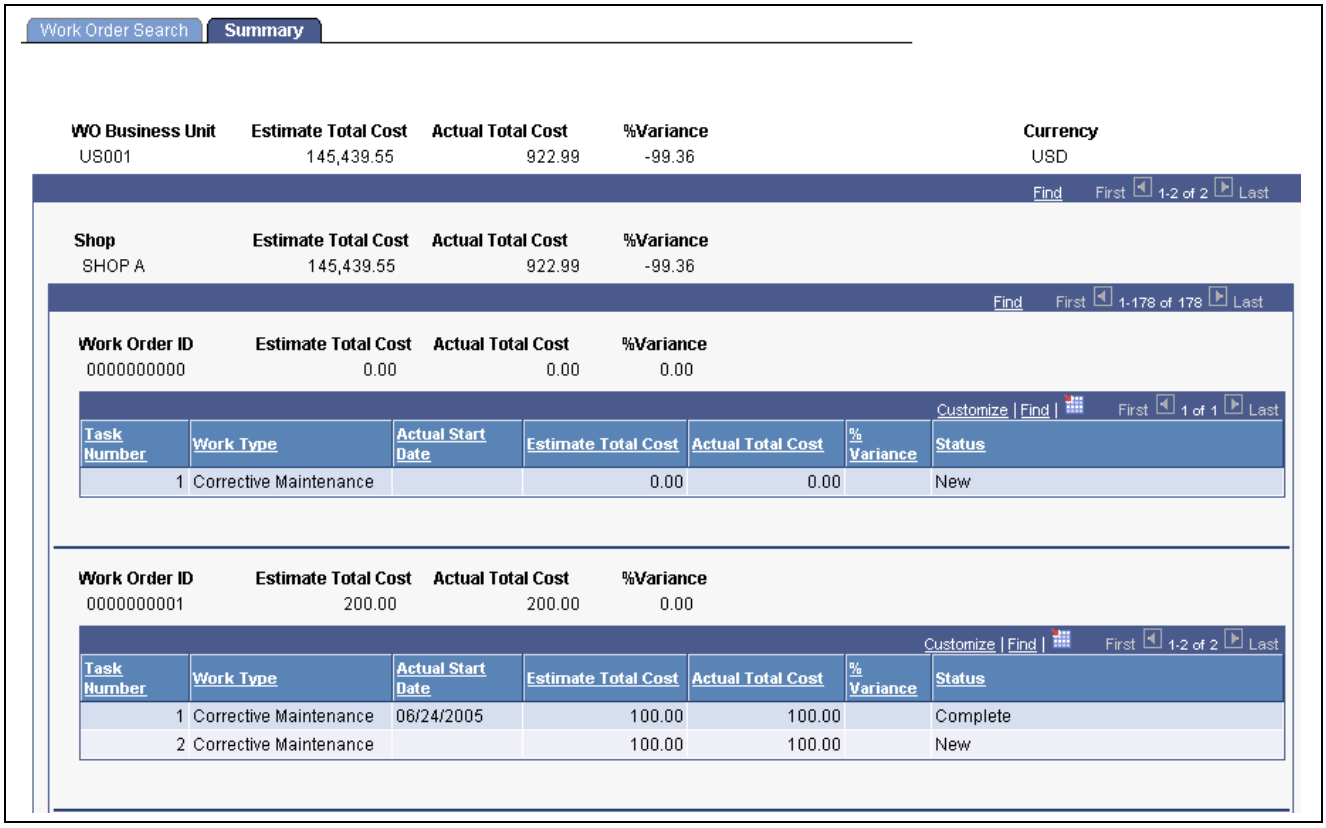
This section discusses how to review the work order history inquiry.

Pages Used to Review the Work Order History Inquiry

Page Name	Object Name	Navigation	Usage
Work Order Search	WM_CINQ_WO	Maintenance Management, Inquiries, Work Order History, Work Order Search	Set up search criteria and search for work order history information.
Work Order History - Summary	WM_CINQ_WO_R1	Maintenance Management, Inquiries, Work Order History, Summary	Review the summary cost information for one or more work orders.

Reviewing the Work Order History Inquiry

Access the Work Order History - Summary page.



Work Order History - Summary page

Work Order Search

You can identify a specific work order ID to search for or enter search criteria based on a work order business unit, which includes the capability to search for work orders associated with a specific project or a specific asset. You can also search for work orders based on the work order status and priority.

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Summary

After you complete the search, the top of the page displays a sum total of the estimated costs, actual costs, and the percentage of variance between the two for all work orders listed on the page.

Following these totals, the page displays a breakdown of the total estimated and actual costs and the variance for each work order, and the total estimated and actual costs and variance for each work order task on the page. The start date and status also appear for each task. The page displays the work orders based on the shop with which they are associated.

Using the Work Progress Tracking Inquiry

This chapter discusses how to track work progress.

Pages Used to Track Work Progress

Page Name	Object Name	Navigation	Usage
Work Progress Tracking	WM_WOE_TWP	Maintenance Management, Inquiries, Work Progress Tracking	Review work order progress.
(Resource Name) Workbench	WM_WOTSK_WORKBENCH	Click the Workbench link on the Work Progress Tracking page.	Search for and review work order tasks assigned to a specific technician.
Work Order Details	WM_WOE_DETAIL	Click the Work Order ID link on the Work Progress Tracking page.	Displays the work order header and task details.
Schedules	WM_WO_TASK_SCHED	Click the Task number link on the Work Progress Tracking page.	Review the details of the selected task in the work order.

Tracking Work Progress

Access the Work Progress Tracking page.

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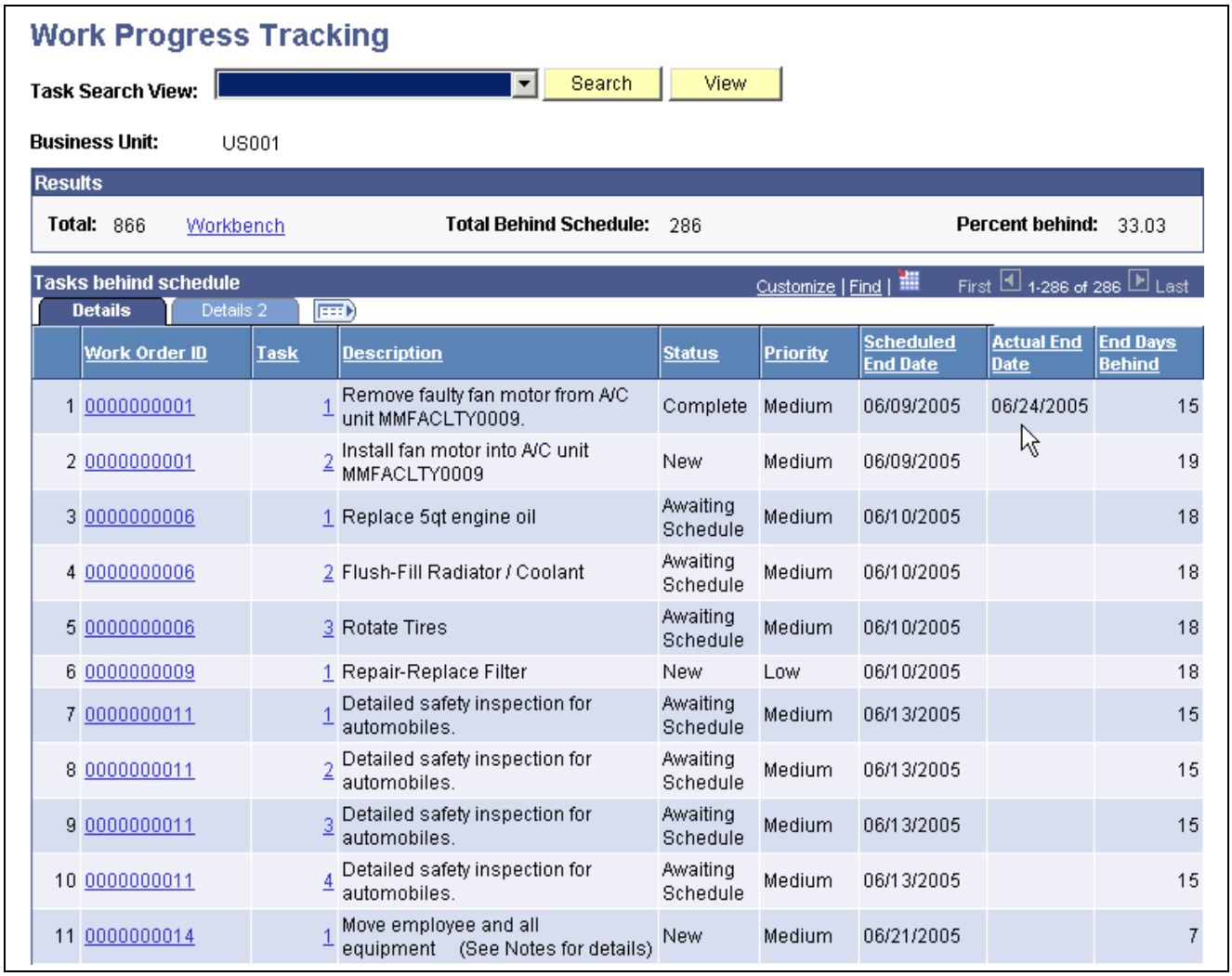

Work Progress Tracking

Task Search View: Search View

Business Unit: US001

Results

Total: 866 Workbench Total Behind Schedule: 286 Percent behind: 33.03

Tasks behind schedule Customize | Find | First 1-286 of 286 Last

Details Details 2

	Work Order ID	Task	Description	Status	Priority	Scheduled End Date	Actual End Date	End Days Behind
1	0000000001	1	Remove faulty fan motor from A/C unit MMFACLTY0009.	Complete	Medium	06/09/2005	06/24/2005	15
2	0000000001	2	Install fan motor into A/C unit MMFACLTY0009	New	Medium	06/09/2005		19
3	0000000006	1	Replace 5qt engine oil	Awaiting Schedule	Medium	06/10/2005		18
4	0000000006	2	Flush-Fill Radiator / Coolant	Awaiting Schedule	Medium	06/10/2005		18
5	0000000006	3	Rotate Tires	Awaiting Schedule	Medium	06/10/2005		18
6	0000000009	1	Repair-Replace Filter	New	Low	06/10/2005		18
7	0000000011	1	Detailed safety inspection for automobiles.	Awaiting Schedule	Medium	06/13/2005		15
8	0000000011	2	Detailed safety inspection for automobiles.	Awaiting Schedule	Medium	06/13/2005		15
9	0000000011	3	Detailed safety inspection for automobiles.	Awaiting Schedule	Medium	06/13/2005		15
10	0000000011	4	Detailed safety inspection for automobiles.	Awaiting Schedule	Medium	06/13/2005		15
11	0000000014	1	Move employee and all equipment (See Notes for details)	New	Medium	06/21/2005		7

Work Progress Tracking page

Task Search View Select a view that you previously created to narrow your search for work order tasks that are behind schedule.

View Click this button to access the Task Search page where you specify the criteria used to search for certain work order tasks. On this page, you can also select the basis date to determine whether tasks are considered behind schedule for the inquiry based on the scheduled start date (the task started late), scheduled end date (the task ended late), both or either of those dates. When you save this search page and name the view, it becomes available for selection in the Task Search View drop-down list. This eliminates the need to specify the search criteria multiple times.

See Chapter 18, "Scheduling a Work Order," Creating Work Order Task Search Views, page 517.

Results

When you click the Search button, a summary of the results of the search appear in the Results group box.

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Total	Displays the total number of work order tasks that were considered based on the search.
Workbench	Click this link to access the Work Order Workbench and view a list of all the tasks returned by the search.
Total Behind Schedule	Displays the total number of the work order tasks in the list and that are thus behind schedule. Only those tasks that are behind schedule are listed.
Percent behind	Displays the percentage of the considered tasks that are behind schedule for the given search.

Tasks Behind Schedule

Lists the tasks that are behind schedule based on your search.

- Select the Details tab to view work order ID, work order task number, the scheduled end date, the actual end date for the task, and the number of end days each task is behind.

  If the task has not ended, the actual end date is blank, and the end days behind is the difference between the scheduled end date and the current date. This same logic applies if you chose the scheduled start date as your basis date. In that case, the actual start date or current date is used in the days behind calculation.

  Click the Work Order ID link to display the Work Order Details page, which consists of the work order header details associated with the selected task, any work order header notes, and a list of all of the tasks that are associated with the work order. A description of each task, the task's status, and any asset information appears in the Task Details grid. The scheduled start and end dates and times of each task appears in Task Dates grid.

  You can also click the Task number link on in the Details grid to access the actual task in the Schedules page of the work order.

- Select the Details 2 tab to view additional details about each task, including the shop ID, scheduler's name, specific asset information, and project information associated with the work order task.

Using the Purchasing and Pegging Inquiry

This section discusses how to review the Pegging and Purchasing Inquiry.

Pages Used to Review the Purchasing and Pegging Inquiry

Page Name	Object Name	Navigation	Usage
Purchase Orders	WM_WO_PO_INQ	Maintenance Management, Inquiries, Purchasing and Pegging	Review any quantities pegged for the work order using purchase orders.
Requisitions	WM_WO_REQ_INQ	Maintenance Management, Inquiries, Purchasing and Pegging	Review any quantities pegged for the work order using requisitions.

Reviewing the Purchasing and Pegging Inquiry

Access the Purchase Orders page.

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Purchase Orders page

The Purchasing and Pegging inquiry provides a view into any requisition and purchase order transactions that are either created using a work order or created in PeopleSoft Purchasing and tied back from the requisition or purchase order to a work order. You can select a specific work order and task on the Work Order Procurement Inquiry page. The work order header information and the work order task number and description appear on the Purchase Orders page and the Requisitions page. You can create a requisition for materials or resources needed in a work order task on the Purchase On/Hand grid, then these requisitions appear in the grid on the Requisitions page. A purchase order sourced from a requisition also appear on the Purchase Orders page. If you created one or more purchase orders for the task, each one is listed on the Purchase Orders page. This inquiry not only displays the pegging relationships, but also provides a view into any requisition or purchase orders transactions that a work order creates.

Resource Line Number Identifies the line number of the selected resource in the work order task's schedule from which the purchase order was created.

PO Business Unit (purchase order business unit) Identifies the business unit associated with the purchase order created for this work order resource.

Line Number Identifies the purchase order line number.

Schedule Number Identifies the purchase order schedule associated with the line number.

Distribution Line Identifies the distribution line number for the purchase order.

Quantity Available Indicates the quantity available that is requested for the work order.

Pegged Quantity Indicates the quantity of the resource that is reserved based on this purchase order for this work order task line.

Using the Chargeback Inquiry

This section describes how to review the chargeback inquiry.

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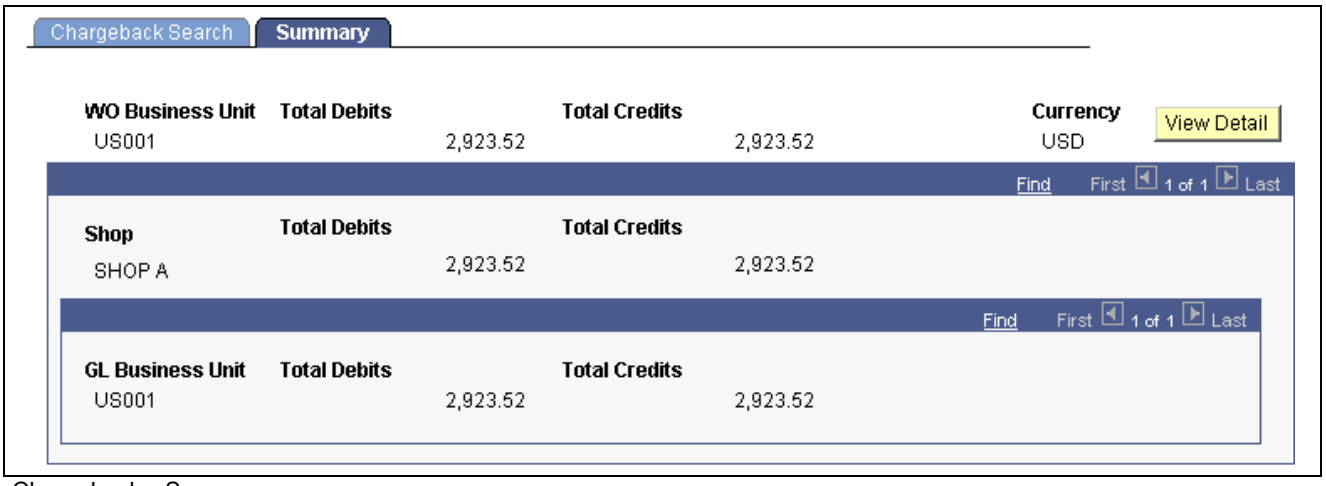
Pages Used to Use the Chargeback Inquiry

Page Name	Object Name	Navigation	Usage
Chargeback Search	WM_CINQ_CHBK	Maintenance Management, Inquiries, Chargeback, Chargeback Search	Search for chargebacks associated with work orders.
Chargeback - Summary	WM_CINQ_CHRG_R1	Maintenance Management, Inquiries, Chargeback, Summary	Review a summary of chargebacks associated with work orders.
Chargeback - Detail	WM_CINQ_CHRG_D	Click the View Detail button on the Chargeback - Summary page.	Displays detail information for chargebacks.

Reviewing the Chargeback Inquiry

Access the Chargeback - Summary page.



Chargeback - Summary page

Chargeback Search

Use the Chargeback Search page to view chargeback cost to other general ledger business units for completed work orders. You can filter your search or specify a criteria.

Summary

The Chargeback - Summary inquiry page displays the summarized chargeback debit and credit amounts by work order business unit, shop, and then totals for each respective general ledger business unit under each shop. The actual costs for labor, inventory, and non-inventory items are processed and sent to PeopleSoft Project Costing, which calculates the chargebacks based on the accounting rules. The Chargeback Search page for the inquiry enables criteria to be entered to view a specific population of data. The inquiry also provides the View Detail button to see the specific work orders that made up the debit and credit balances.

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Using the Capitalization Inquiry

This section discusses how to use the capitalization inquiry.

Pages Used to Review the Capitalization Inquiry

Page Name	Object Name	Navigation	Usage
Capitalization Search	WM_CINQ_CAP	Maintenance Management, Inquiries, Capitalization, Capitalization Search	Search for work orders with capitalization costs.
Capitalization - Summary	WM_CINQ_CAP_R1	Maintenance Management, Inquiries, Capitalization, Summary	Review a summary of capitalization costs associated with work orders.
Capitalization - Detail	WM_CINQ_CAP_D	Click the View Details link on the Summary page.	Displays the detail associated with a specific work order.

Reviewing the Capitalization Inquiry

Access the Capitalization - Summary page.

Capitalization Search | Summary | Detail

WO Business Unit	Amount to be Capitalized	Actual Total Cost	Currency
US001	0.00	1,097.49	USD

Find First 1 of 1 Last

Shop	Amount to be Capitalized	Actual Total Cost
SHOP A	0.00	1,097.49

Find | View All First 1 of 2 Last

Work Type	Amount to be Capitalized	Actual Total Cost
CM	0.00	1,097.49

Customize | Find | First 1-18 of 18 Last

AM Business Unit	Asset Type	Asset Subtype	Manufacturer ID	Model	Work Order ID	Amount to be Capitalized	Actual Total Cost	View Detail
US001	Fleet	AUTO	FORD	Escape 2003	0000000002	0.00	126.00	View Detail
US001	Fleet	AUTO	FORD	Escape 2003	0000000003	0.00	0.00	View Detail
US001	Fleet	AUTO	FORD	Escape 2003	0000000004	0.00	0.00	View Detail
US001	Fleet	AUTO	FORD	Escape 2003	0000000026	0.00	0.00	View Detail
US001	Fleet	AUTO	FORD	Escape 2003	0000000027	0.00	0.00	View Detail
US001	Fleet	AUTO	TOYOTA	Camry	0000000007	0.00	0.00	View Detail
US001	Fleet	AUTO	TOYOTA	Camry	0000000013	0.00	221.49	View Detail

Capitalization - Summary page (partial)

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Capitalization Search

You can identify a specific asset ID to search for or enter search criteria based on a work order business unit, which includes all assets on a work order related to the work order business unit. You can also search by shop, Asset Management business unit, asset type, asset subtype, manufacturer ID, model, location, asset area ID, and work order closure date.

Summary

Depending on your search criteria, you can view the total amount for all assets to be capitalized, the actual total cost, and the associated details for that search criteria. For example, if you search by the work order business unit, the system displays all assets associated with that business unit and the sum of all capitalization costs and the actual total cost. Following these totals is a grid displaying the breakdown of the total amount to be capitalized and actual total cost by the asset business unit, asset type, asset subtype, and so on.

If you filter your search criteria by selecting an Asset Management business unit and asset ID, the system displays the total amount capitalized and the actual total cost for that specific asset ID, broken down by work order IDs and costs for each work order ID. This inquiry helps to identify the amount of capital work performed and the actual expenses for each shop and business unit.

Important! Select Maintenance Management, Work Order Management, Work Order Processing and run the Cost Summarization process after you run the Capitalization process in order for the amount to be capitalized values to appear on this inquiry.

Using the Crew Schedule Inquiry

This section discusses how to review the Crew Schedule Inquiry.

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Pages Used to Use the Crew Schedule Inquiry

Page Name	Object Name	Navigation	Usage
Crew Schedule Work Inquiry	WM_CS_INQ	Maintenance Management, Inquiries and Reports, Crew Schedule Inquiry	Review the past, current, and future schedules for a selected crew.
Work Order	WM_WO_HDR	• Click the Work Order ID link on the Crew Schedule Work Inquiry page - Crew Assignment tab. • Maintenance Management, Work Order Management, Work Order	Access and update the work order depending on user authorizations.
WO Task Description	WM_TSK_DESC2_SEC	Click the Task Description link on the Crew Schedule Work Inquiry page - Crew Assignment tab.	Review the work order ID, business unit, task number, and description associated with a selected task.
Schedules	WM_WO_TASK_SCHED	Click the Yes or No link associated with Labor, Tools, Inventory, or Purchase/On-Hand on the Crew Schedule Work Inquiry page - Resources tab.	Access the Labor Schedules grids, Tool Schedules grids, Inventory Schedules grids, or Purchase/On-Hand Schedules grids on the Schedules page in the Work Order and update if authorized to do so.
Asset Information	WM_WO_ASSET_SEC	Click the Asset ID - Descriptions link on the Crew Schedule Work Inquiry page - Asset Information tab.	Review information about the asset selected for a task.

Reviewing the Crew Schedule Inquiry

Access the Crew Schedule Work Inquiry page.

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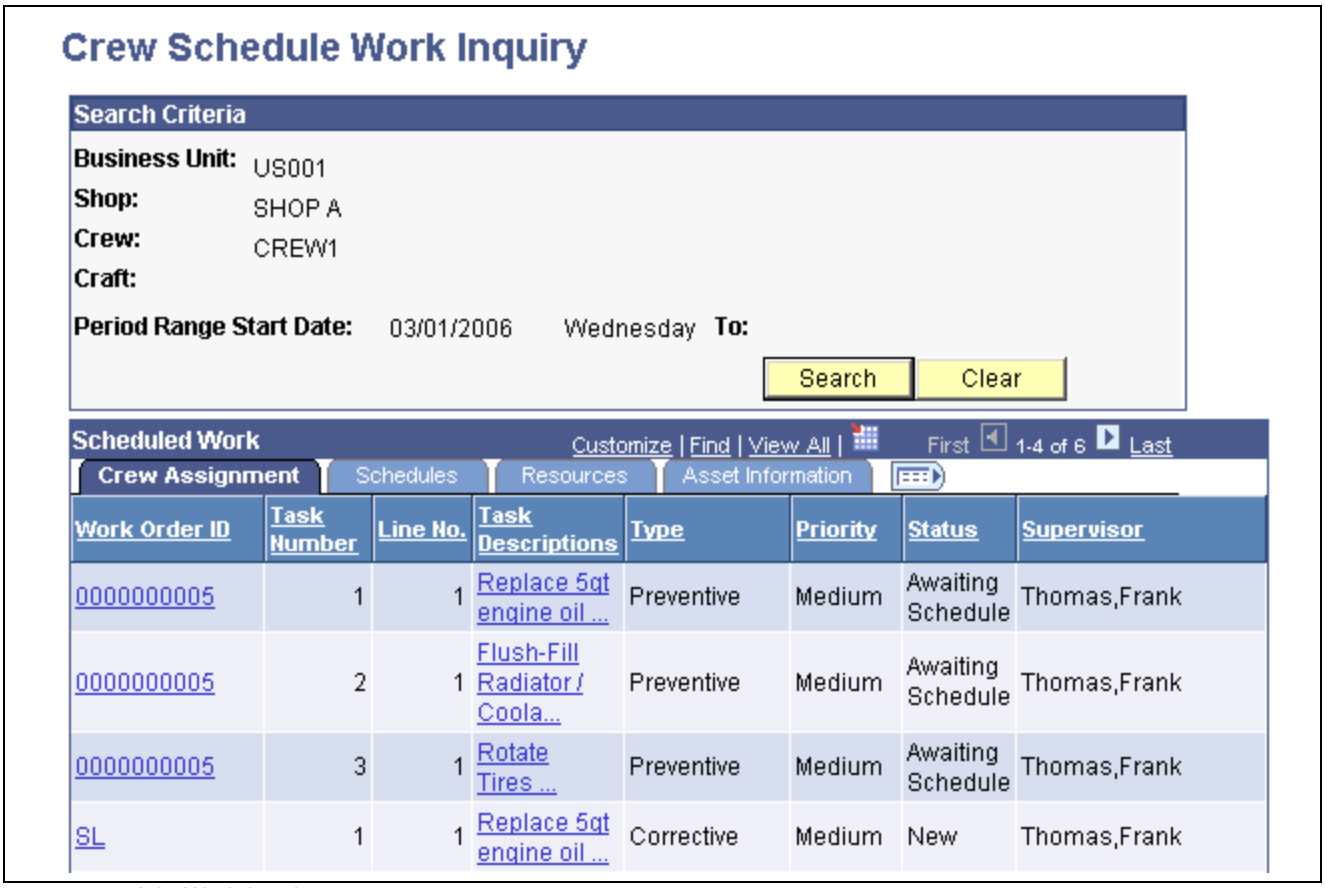

Work Order ID	Task Number	Line No.	Task Descriptions	Type	Priority	Status	Supervisor
0000000005	1	1	Replace 5qt engine oil ...	Preventive	Medium	Awaiting Schedule	Thomas,Frank
0000000005	2	1	Flush-Fill Radiator / Coola...	Preventive	Medium	Awaiting Schedule	Thomas,Frank
0000000005	3	1	Rotate Tires ...	Preventive	Medium	Awaiting Schedule	Thomas,Frank
SL	1	1	Replace 5qt engine oil ...	Corrective	Medium	New	Thomas,Frank

Crew Schedule Work Inquiry page

You must select a work order business unit, shop, crew and period range start date to search for a crew schedule inquiry. Selecting a craft is optional. If you do not select an end date to the period range, the system displays all schedules with dates equal to or greater than the period range start date.

When you click the Search button, a list of work orders and their associated tasks, which are scheduled and approved for the selected crew displays based on the start date (and end date, if selected) that you entered. This inquiry enables you to view the work order task, its scheduled start/end date time, completed date, associated resources, and asset information if authorized.

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CHAPTER 24

Using Supplemental Data

This chapter provides an overview of Oracle's PeopleSoft Enterprise Maintenance Management supplemental data, and discusses how to establish supplemental data.

Understanding Supplemental Data

Because every organization has different data requirements for work orders based upon unique business processes and regulatory issues, PeopleSoft Maintenance Management includes the Supplemental Data component to provide a way to define additional work-order related data. This component enables system administrators to extend the information that is stored for an object without requiring modifications to the object's base table (record) and without requiring additional PeopleCode or PeopleTools customizations. The supplemental data framework uses the PeopleSoft Enterprise Common Components Active Analytic Framework (AAF) to define the business rules for the additional data.

See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, "PeopleSoft Active Analytics Framework".

Supplemental data is valuable when you want to capture information about a subset of object instances with fields that are relevant only to these particular object instances. Objects include records, pages and components, which you must configure specifically to accept supplemental data. For example, PeopleSoft defines and enables the Service Request, Work Order Header, and Work Order Task to include supplemental data for PeopleSoft Maintenance Management. Supplemental data may be a field that is embedded in the page or displays on a secondary page. PeopleSoft defines and registers both the supplemental data store records associated with a base record and the components to be used for supplemental data. Be aware that adding any additional objects is regarded as a customization and requires familiarity with PeopleTools.

When you set up supplemental data, you define records and fields and map them to a data storage record. These definitions are not stored in the PeopleTools metadata tables but in the supplemental data's own metadata tables. You define supplemental data page elements to display on the page in two columns. You must also group supplemental data fields within a display group for display purposes. You assign display groups to pages that are enabled for supplemental data. Once you have made this designation, you can define the conditions under which the application should use the supplemental data. You may perform a search on one display group. The pages within the Supplemental Data component enable you to accomplish these tasks.

Considerations and Limitations

The decision to add supplemental data to your application should be based on how applicable the data objects are to instances of the object. If the data objects apply to a significant number of instances of the object, then it may be better to add a field to the table using Application Designer instead of using attributes to capture the data. If the data elements apply to a much smaller percentage of the objects, then attributes may be the solution. While supplemental data provides a large amount of flexibility in terms of adding data elements without changing the underlying data model, you should consider the following limitations when you are evaluating whether to implement supplemental data:

- Supplemental data does not fall under the normal upgrade capabilities that are provided with PeopleTools.

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Because supplemental data records are not a type of PeopleTools object, you cannot use the standard upgrade facilities that are provided by PeopleTools, such as the Upgrade Copy or Upgrade Compare process, to upgrade supplemental data from one database to another. The mechanism for migrating supplemental data is to extract the data from the source database and move the data to the target database, which can be accomplished, for example, by using Data Mover or a similar tool. PeopleSoft does not deliver any utilities, such as data mover scripts, for migrating supplemental data.

- Because supplemental data records are stored in separate tables (distinct from the base table), it can be difficult to incorporate supplemental information into reports.
- Supplemental data can only be displayed in a two-column format.
- Performance issues can occur if you have too many supplemental data records in the system.

  Use supplemental data only if the data elements are truly dynamic in nature or if they apply to certain instances of an object. Never use supplemental data simply because it is easier to create than standard PeopleTools fields.

Terms

We use the following terms when discussing supplemental data:

Supplemental Data Field	Defined in the Supplemental Data Record, mapped to fields of the data store record. Also referred to as "Field" in the context of supplemental data setup.
Display Group	Grouping of supplemental data fields, for display purpose.
Supplemental Data Page	The page where supplemental data will be displayed or entered in runtime. Also referred to as *Page* in the context of supplemental data setup.
Supplemental Data Record	Logical data model for supplemental data. Also referred to as *Record* in the context of supplemental data setup.
Supplemental Data Store	The physical table where supplemental data is stored. Also referred to as *Data Store* or *Data Store Record*.
Search Record	Record that saves search criteria for the base record.
Supplemental Search Record	Record that saves search criteria for the base record. The criteria are based on the supplemental data defined for the base record.

Supplemental Data Record Details

The Supplemental Data components, Register Record and Register Component are system-defined by PeopleSoft. The purpose of these options is to associate the supplemental data storage and optional search records with a PeopleSoft Maintenance Management base record and a PeopleSoft Maintenance Management component.

For each base PeopleSoft Maintenance Management record, there is an associated supplemental data storage record:

Base Record	Supplemental Data Storage Record
WM_WO_HDR	WM_WO_HDR_SD
WM_WO_TSK	WM_WO_TSK_SD
WM_WR_HDR	WM_WR_HDR_SD

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The following components and pages are enabled for supplemental data. There are AAF contexts and terms defined for the components. You can define an AAF condition to show different display groups based on business rules.

Component	Page	Base Record
WM_ADD_WR_SS	WM_WORK_REQUEST_SS	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUMMARY_WIZ	WM_WR_HDR
WM_ADD_WR_WIZARD	WM_WR_SUPLDATA_WIZ	WM_WR_HDR
WM_WO	WM_TSK_SD_SEC	WM_WO_TSK
WM_WO	WM_WO_DETAIL	WM_WO_HDR
WM_WO	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WO_WR	WM_WOHDR_SD_SEC	WM_WO_HDR
WM_WOE_SD	WM_WOE_SD	WM_WO_TSK
WM_WORK_REQUEST	WM_WORK_REQUEST	WM_WR_HDR

The following delivered system data enables users to search work order tasks based on a work order header's supplemental data. There can be supplemental display groups with no AAF condition on a search page. Since the advanced search page is implemented as a secondary page, which users can invoke from the main page, you need to have the same assignment for these two pages:

Base Record	Storage Record	Base Search Record	Supplemental Data Search Record
WM_WO_HDR	WM_WO_HDR_SD	WM_TSK_SRCH	WM_TSK_SRCH_SD

The system stores the search criteria in the Supplemental Data Search Record using the same mapping defined for the Supplemental Record. There are no AAF contexts and terms defined for the components used for the search:

Component	Page	Base Record
WM_WOE_TWP	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_TWP	WM_WOE_TWP	WM_WO_HDR
WM_WOE_WB1	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOE_WB1	WM_WOE_WB	WM_WO_HDR
WM_WOTSK_WORKBENCH	WM_TSK_SRCH_SEC	WM_WO_HDR
WM_WOTSK_WORKBENCH	WM_WOTSK_WORKBENCH	WM_WO_HDR

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Example

PeopleSoft Maintenance Management serves as an excellent example of how supplemental data is set up and used in an application. For example, an organization may need to create work orders to assign and schedule resources to repair vehicles and uses PeopleSoft Maintenance Management. Part of this repair process includes the requirement to track any hazardous waste that was created while performing this work. This organization wants a Hazardous Waste group box to display, which contains the fields labeled as Date Generated (DATE), Description (DESCR), Notes (NOTES), Quantity (QTY), Unit of Measure (UOM), and Waste Code (WASTE_CD) when you create or update a work order task for this type of work.

Based on the registered records and components, you access the Define Record component and define each supplemental data record such as PS_HAZARD_WASTE, associate it with a supplemental data stored record, such as WM_WO_TSK_SD, and add all the field names and their associated details that you want to include in this record. Based on the hazardous waste example, you would add the fields: DATE, DESCR, NOTES, QTY, UOM, and WASTE_CD. You create a field name (WASTE_CD), a field label (Waste Code), select how the field will be used (code), the field length displays based on the field's use type (4 displays for code), and select a supplemental database field (SD_TEXT_4_1) in which to store each field's data. Since the use type for the field in this example is *code*, an additional group box displays where you can define all the field values and the order in which you want each value to display on the drop-down list For example, the WASTE_CD values might be D001, D002, D003, D004, D005, D006. Initially the status in the Record page is *In Design*. You must change the status in the Record page to *Activated* before saving the data and exiting this option.

Note. If you access the Define Record component for an existing record, you must change the status field to *In Design* before making any changes. After you add the new field, you must change the status field back to *Activated* before saving and exiting the component.

Once you have defined and activated all of your fields, you must access the Define Display Group component and create a display group, such as PS_HAZARD_WASTE, and associate it with a base record, such as WM_WO_TSK. You then must identify the fields and their associated records that you want to appear in either the left or the right column of the page. If a label is not associated with the field name, you may enter a label here. For example, for the PS_HAZARD_WASTE record, you might want to put the fields DATE , DESCR, and NOTES fields in the right column, and the QTY, UOM, and WASTE_CD fields in the left column.

Once you create a display group, you associate one or more of the display groups that you created to a component, such as the WM_WO component. This is also where you identify whether the condition is editable or read-only. If the condition is editable, you may access the condition term page where you may edit and add conditions for this display group. When you access the Work Order component in PeopleSoft Maintenance Management and access the WM_WO_DETAIL page, the supplemental data group box containing the supplemental data fields appear on the page.

Establishing Supplemental Data

To establish supplemental data, use the following components:

- Register Record (FS_SD_REG_REC) component.
- Register Component (FS_SD_REG_COMP) component.
- Define Record (FS_SD_RECDEFN) component.
- Define Display Group (FS_SD_GRPDEFN) component.
- Assign Display Group (FS_SD_PAGE_GRP) component.

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This section discusses how to:

- Define a supplemental data record.
- Define and map supplemental data record fields to data store records.
- Specify details for supplemental data record files.
- Define a supplemental data display group.
- Assign a supplemental data display group.
- Define conditions for display groups.

Pages Used to Set Up Supplemental Data

Page Name	Object Name	Navigation	Usage
Register Record	SD_REG_REC	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Register Record	Registers the supplemental data base record and optionally registers the record that saves the search criteria for the base record. **Note.** This is PeopleSoft system-defined data and is not set up by users. It should not be modified.
Register Component	SD_REG_COMP	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Register Component	Registers and enables the component and the pages for supplemental data. **Note.** This is PeopleSoft system-defined data and is not set up by users. It should not be modified.
Define Record - Record	SD_RECDEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Define Record, Record	Defines the supplemental data record associated with the base record and identifies where to store this record.
Define Record - Fields Summary	SD_RECFLD	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Define Record, Fields Summary	Maps fields to the data storage fields.
Define Record - Fields Detail	SD_RECFLD_DTL	• Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Define Record, Fields Detail • Click a field name on the Define Record - Fields Summary page.	Defines a field's detail information.

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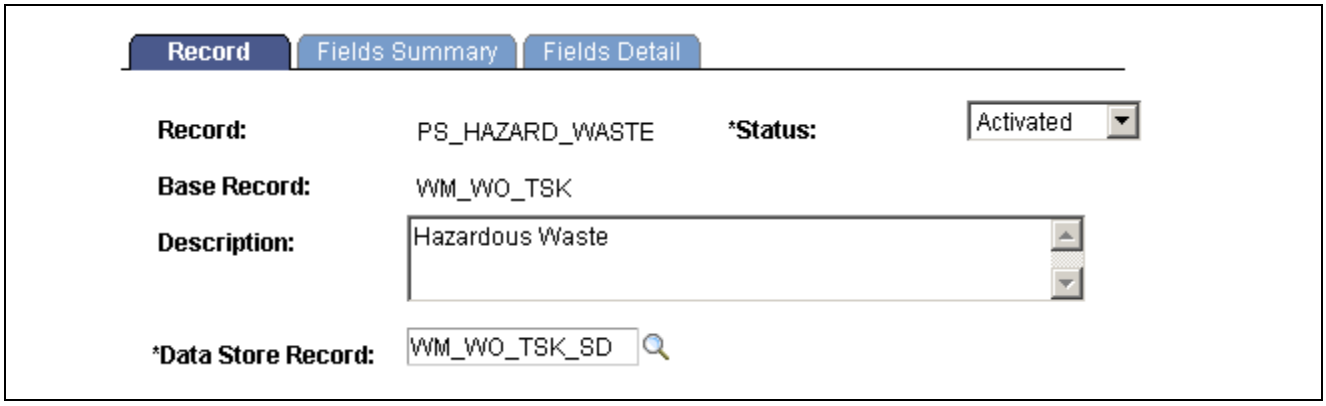
Page Name	Object Name	Navigation	Usage
Define Display Group	SD_GRPDEFN	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Define Display Group	Defines a display group and associates any records and fields, as well as identifies the order in which the fields appear on the page.
Assign Display Group	SD_PAGE_GRP	Set Up Financials/Supply Chain, Product Related, Maintenance Management, Supplemental Data, Assign Display Group	Assigns one or more display groups to a supplemental data-enabled component and page.
Assign Display Group - Conditions	SD_PHRASE_SEC, SD_TERM_SEC	Click the Edit icon.) on the Assign Display Group page.	Specify conditions that control when a display group appears.

Defining a Supplemental Data Record

Access the Define Record - Record page.



Define Record - Record page

Record Enter a name for a supplemental data record. For example a possible supplemental data record name used for PeopleSoft Maintenance Management may be PS_WASTE.

Base Record Select a base record on the Define Record page to associate with this supplemental data record. For example, a PeopleSoft Maintenance Management base record is WM_WO_TSK.

Status Select a status of *In Design* during the time that you are defining this record. Change the status to *Activated* to indicate that you completed mapping the supplemental data fields.

Note. If you update a record, before you add a field or make changes to a record, you must change this status back to *In Design*. When you have completed the modification, you must change the status back to *Activated* before saving and exiting the component.

Data Store Record Select one of the data store records that you previously registered that you want to use to store this supplemental data record. For example, the data

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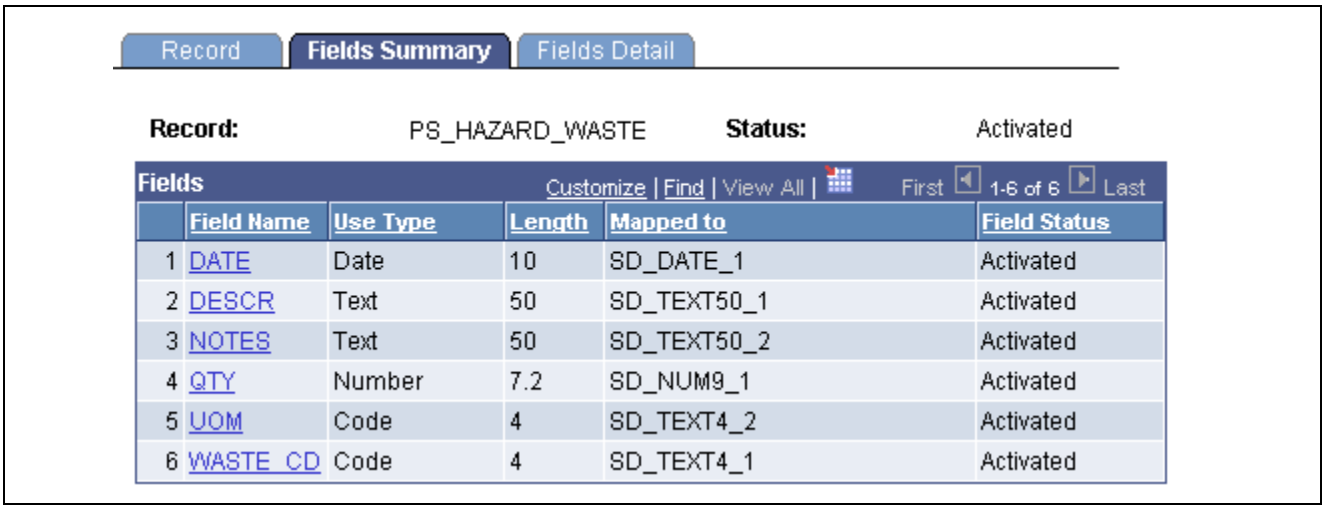
store record for this supplemental data record in PeopleSoft Maintenance Management is WM_WO_TSK_SD.

Defining and Mapping Supplemental Data Record Fields to Data Store Records

Access the Define Record - Fields Summary page.



Define Record - Fields Summary page

Field Name, Use Type, Length, Mapped to and **Field Status**

Click the Field Name link to access the Fields Detail page. The remaining fields on this page are all defined in the Fields Detail page. Once you finish adding all the fields and their descriptions on the Field Details page, and change the Status value in the Record page to *Activated*, each new field name and its characteristics appear on this summary page. You may then click on each field name and access the field name's detail information in the Define Record - Fields Detail page.

Specifying Details for Supplemental Data Record Fields

Access the Define Record - Fields Detail page. You access this page when you click the Field Name on the Define Record - Fields Summary page.

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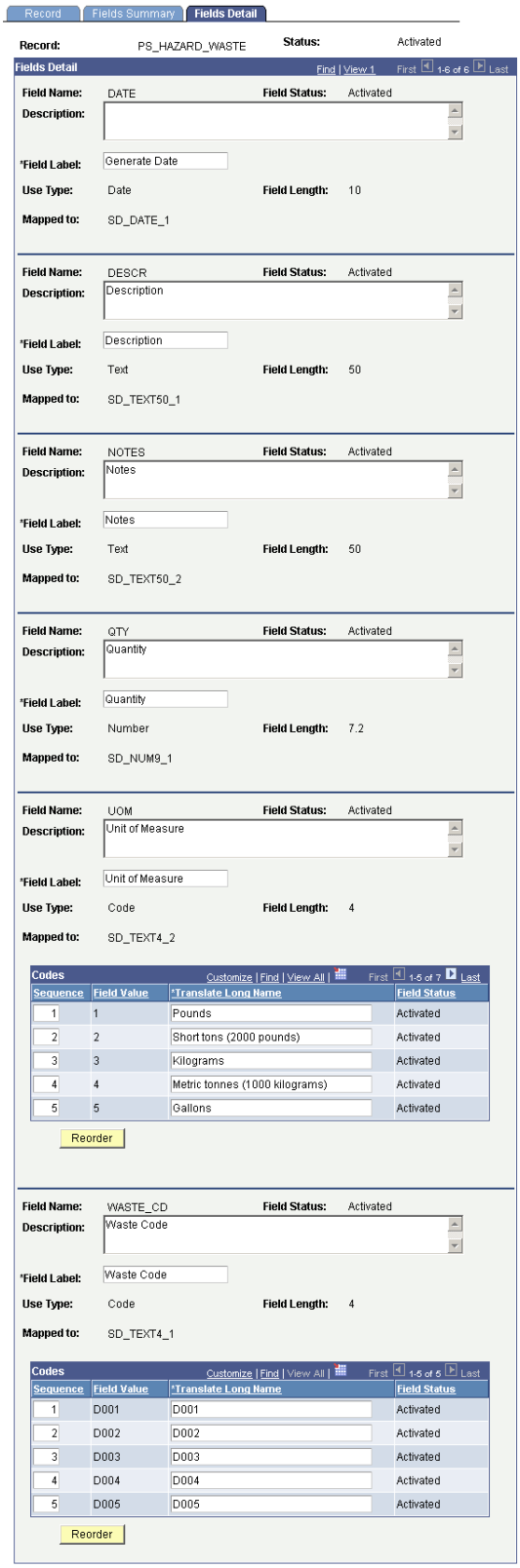

Define Record - Fields Detail page

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Field Name Enter a name for the supplemental data field and a description of the field. For example, in PeopleSoft Maintenance Management this field might be called WASTE_CD.

Field Label Enter the a label to display on the page for this field. For example, in PeopleSoft Maintenance Management this field might be *Waste Code*.

Use Type Select one of the following based on how the field will be used:

- *Code*
- *Number*
- *Signed Number*
- *Text*
- *Time*
- *Yes/No*

Field Length Select a length based on the selected Use Type:

- If the use type is a number or signed number consisting of an integer or decimal position, the field lengths may only be: 9.0, 7.2, and 15.4.
- If the use type is text, the field length may be 4, 20, 50, or 100.
- If you select any of the remaining use types, each type's field length is dictated by the specific length of the selected use type.

Mapped To Select the data store field to which you want to map this field.

Note. Once you change the status to *Activated* on the Record page, the information listed above, with the exception of the description and field label, becomes read-only and cannot be modified.

Codes

This group box displays if you selected *code* as a Use Type and identifies a list of code values for a drop-down list.

Sequence Enter a number to represent the order in which you want to see these codes listed in a drop-down list or lookup page.

Field Value and **Translate Long Name** Enter each valid code in this list along with the text that you want to appear on the list when the drop-down list displays.

Field Status Displays the current status of the field. Initially this value will be *In Design.* The value changes to *Activated* after you change the record status to*Activated* on the Define Record - Record page.

Reorder Click this button to assign each code a unique sequential number and reorganize the sequence numbers in top-down numerical order.

Defining a Supplemental Data Display Group

Access the Define Display Group page.

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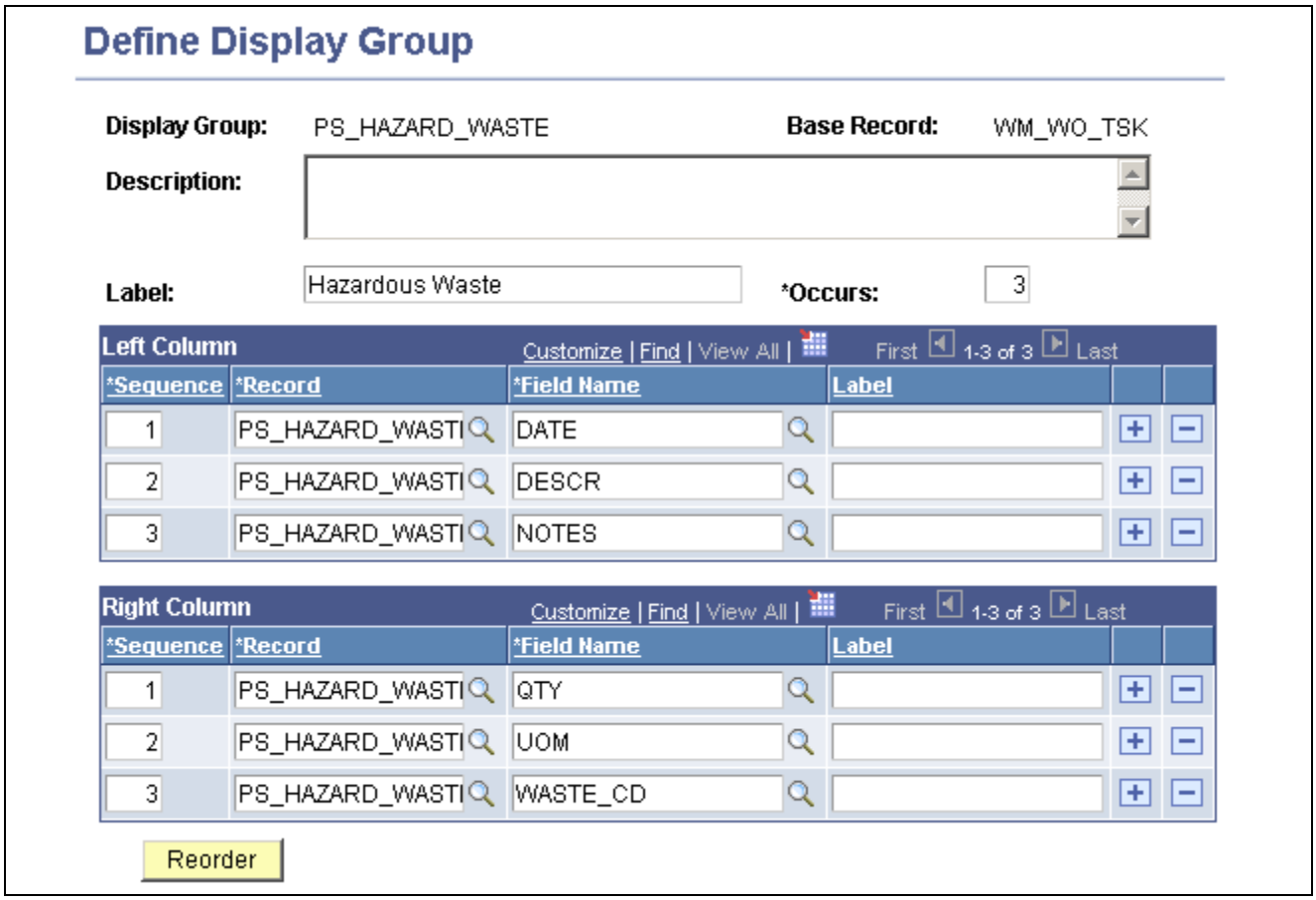

Define Display Group page

Display Group Select a base record to associate this new display group with and enter a name for this display group in the Define Display Group Add page.

Label Enter a label for the display group data group box.

Occurs Enter the number of rows of data to display in the group box.

Left and Right Columns

The supplemental fields that you want to appear on a page are defined in left and right columns.

Sequence, Record, Field Name, and **Label** Select the record and field name, enter a label that you want to display on the page for the field name for each supplemental data field. Enter a sequence number to determine the order in which the fields should display on the page for each column.

Assigning a Supplemental Data Display Group

Access the Assign Display Group page.

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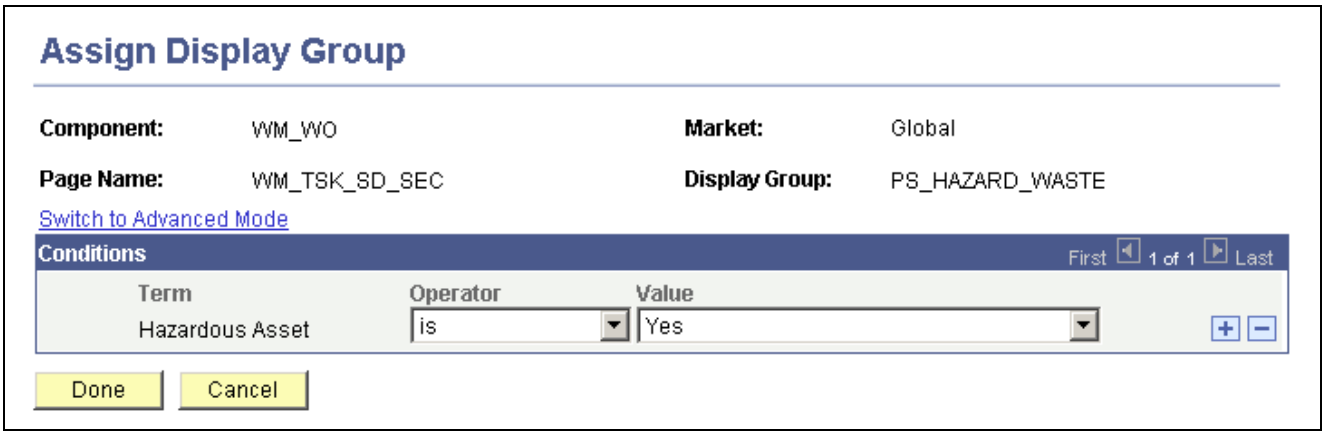

Assign Display Group page

Component Name and **Market** Select the component that is enabled for supplemental data and with which you want to associate a supplemental data display group in the Assign Display Group Search page. The Market for which this component was defined displays as read-only along with the Component Name.

Enabled Pages and Display Groups

This group box displays the name of the pages within the component that are enabled for supplemental data, their associated base record, and any associated display groups. You may also add the display groups that you want to appear in this component and page.

Sequence, Display Group, Use Add a supplemental data display group that you want to associate with this component and this page, and select whether you want the text associated with the display group to be *Editable* or *Read-only.*

User Friendly Text Describes the condition associated with this display group in easy to understand terminology.

Click the Edit icon to access the Assign Display Group - Conditions page where you can establish conditions that control when a display group appears. For example, you could set a condition so that a display group appears only when there is a hazardous asset associated with a work order task, or when the work order is of the type *CM* (corrective maintenance).

Click the Clear icon to remove the condition that is associated with this display group.

Note. If the supplemental data page is registered as a search page, then you may add only one display group to the page; you must select 1 as the value in the Occurs field for the selected display group; you must define all fields for this display group for the same record definition; and you must map this record to a data store record defined with a Search Supplemental Search record. With PeopleSoft Maintenance Management, you can only search based on supplemental data for the Work Order Header.

Defining Conditions for Display Groups

Access the Assign Display Group - Conditions page.

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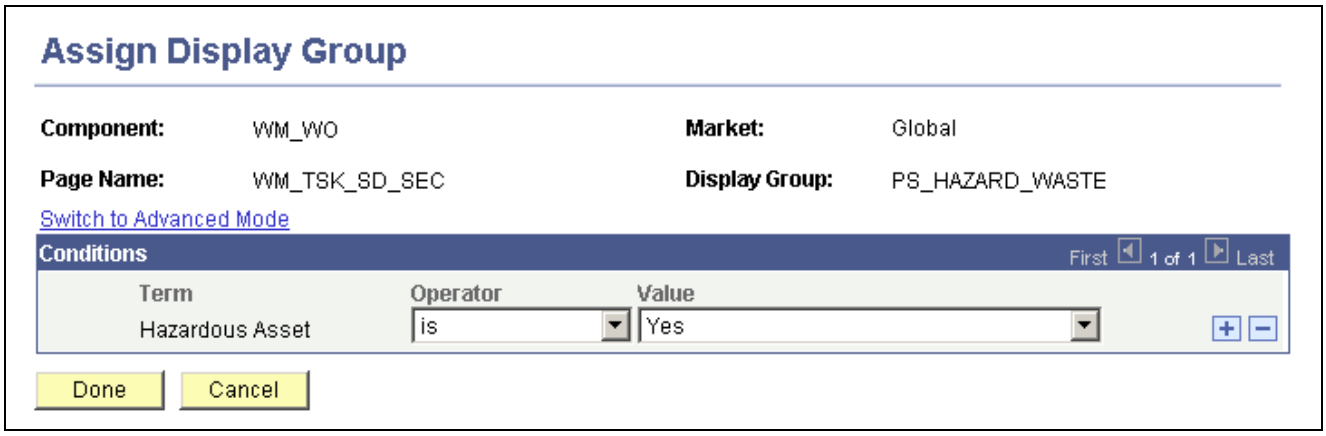

Assign Display Group - Condition page

Supplemental data depends on the Active Analytics Framework (AAF) to define and resolve the conditions for a supplemental data display group. AAF is a PeopleSoft Enterprise Component that includes the following components:

- Data Library Framework.
- Rule Evaluation Engine.
- Rule Builder Framework.
- Action Framework.

PeopleSoft Maintenance Management utilizes all of these AAF components with the exception of the Action Framework.

See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, "PeopleSoft Active Analytics Framework".

You define a condition using a combination of a term, an operator, and a value or term. A term is a nontechnical name that refers to the information (data) that can be retrieved or computed and is the object evaluated within a condition. This page enables you to build conditions by viewing and selecting the terms, operators, and value/term that define the condition.

To add a condition:

1. Select a term.
2. Select an operator.
3. Enter or select values or terms to define the right side of the condition equation, if required by the selected operator.

Note. To add conditions for values derived from control tables that are keyed by setID (for example, Work Type, Service Group ID), you must use one of the "in list" operators (*is in list*, or *is not in list*).

There are two modes that you can use to specify conditions:

- Basic.

  This is the default mode. When you select this option, the Select Subject Area group box appears, with a folder hierarchy of subjects. Navigate through the subjects and select one to view the terms available in an adjacent group box. Click a term to select it and insert it into the condition.

  If the criteria you define includes more than one condition row, the system uses AND logic for the conditions, therefore all of the conditions must be met for the criteria to evaluate as true.

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- Advanced.

  This mode enables you to group condition rows using parenthesis, specify the logical operator for each condition row (AND, OR), and specify terms as values in the right-hand side of the condition equation.

Switch to Advanced Mode	Click to activate advanced mode.
Switch to Basic Mode	Click to activate basic mode.
Switch to Search Mode	Click to activate search mode, where you can execute a search for defined terms.
Switch to Browse Mode	Click to activate browse mode, where you can browse defined terms.
Select Term	Click to insert the term into the condition.
Term	Displays the term name used in the condition that is evaluated against the Value.
Operator	Select the operator to use for the condition. The list of available operators depends on the term upon which the condition is based.
Value	Displays the value to which the Term is compared.
Done	Click to create the condition and return to the Assign Display Group page.
Cancel	Click to cancel building the condition.

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APPENDIX A

Configuring Batch Processes

This appendix discusses how to configure Oracle's PeopleSoft Enterprise Maintenance Management temporary tables for batch processing.

Configuring Temporary Tables for Batch Processing

When you run batch processes in parallel, you risk data contention and deadlocks on temporary tables. To avoid this, PeopleTools enables you to dedicate specific instances of temporary tables for each process. When PeopleSoft Application Engine manages a dedicated temporary table instance, it controls the locking of the table before use and the unlocking of the table after use.

When you decide how many temporary table instances to dedicate for a process, consider the number of temporary tables that the process uses. More instances result in more copies of the temporary tables on the system. For example, if a process uses 25 temporary tables and you have 10 instances for a process, you will have 250 temporary tables on the system.

If you run processes in parallel and all of the dedicated temporary table instances are in use, the performance of the process decreases. You need to find a balance that works for your organization.

Note. When you specify the number of instances, PeopleSoft Enterprise Application Designer displays a list of the temporary tables for the process. Use the list to determine how many temporary tables each process uses.

Specify how many temporary table instances to dedicate for each of the following batch PeopleSoft Enterprise Application Engine processes that can run in parallel in PeopleSoft Maintenance Management:

- Cost Summarization (WM_SUMMCOST)
- Create Resources Program (RS_CW)

  Note. If you have licensed the PeopleSoft Resource Management application, you may already have configured it for temporary table instances, as this process is shared by both PeopleSoft Resource Management and PeopleSoft Maintenance Management.

- Export to Microsoft Project (WM_MSP)
- Preventive Maintenance Process and Projections (WM_PM)
- Stage Time Entries (EX_TRAN_PRCS)

  Note. If you have licensed the PeopleSoft Payables application, you may already have configured it for temporary table instances, as this process is shared by both PeopleSoft Payables and PeopleSoft Maintenance Management.

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- Work Order Close (WM_CLOSE)
- Maintenance Schedule Completion Report (WM_SCHEDCOMP)

The PeopleTools documentation discusses the usage of temporary tables in detail and describes how to specify the number of instances.

If you run any of the PeopleSoft General Ledger COBOL processes, also configure the temporary tables for those processes. The *PeopleSoft Enterprise General Ledger 9.0 PeopleBook* discusses how to do this in detail.

See Also

PeopleSoft Enterprise General Ledger 9.0 PeopleBook, "Optimizing General Ledger Performance"

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine

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APPENDIX B

Delivered Workflows for PeopleSoft Maintenance Management

This appendix discusses workflows for PeopleSoft Maintenance Management.

See Also

Chapter 10, “Configuring Work Order Approval Workflow,” page 251

Chapter 15, “Approving Work Orders,” page 407

Enterprise PeopleTools PeopleBook: Workflow Technology

Delivered Workflows for PeopleSoft Maintenance Management

This section discusses Oracle’s PeopleSoft Enterprise Maintenance Management workflows.

Assignment Approval

This section discusses the approval of labor resource assignments.

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Description

Event Description	Work Order assignment workflow options are configured on the Maintenance Management Options page. If workflow is enabled in the Options page for Work Order labor assignments, it is only triggered if the resource is assigned to a work order task that is outside of the resource's shop.
Action Description	If the assignment approval option is turned on at the work order business unit option level, assignment workflow is initiated when a technician is assigned to a work order in a shop different than the technician's shop. In this case, the assignment is set to pending approval and sent to the resource's supervisor's worklist for approval. The supervisor can navigate to the Assignment Approval page by clicking the link in the worklist. The supervisor can then navigate from this Assignment Approval page to the work order associated with the assignment by clicking the work order or the work order task link. The Assignment Approval page for work order assignment displays the work order business unit, shop, resource's craft, shop manager's name, work order ID, work order task, resource type, and resource line number. The supervisor can approve or reject the assignment in this page. If the supervisor approves the assignment, the assignment status is set to Assigned. If the supervisor rejects the assignment, the status is set to Rejected . Both the resource's supervisor and the resource may be sent an email based on the notification method specified on the Maintenance Management Options page. **Important!** The supervisor must exist as an employee in the system by using the Update Employee Data - Employee Job page.
Notification Method	Worklist or email. **Note.** A work list or email notification is not sent to the user who changes the assignment. For example, a work list item is not sent to the resource supervisor to approve a new assignment if the resource supervisor is the person who originally submitted the assignment.

Workflow Objects

Business Process	Assignment Approval (RS_ASSIGN_APPROVAL).
Activity	Assignment Approval (WM_ASSIGN_APPROVAL).

Work Order Approval

This section discusses work order approval workflow.

Work Order Approval workflow uses the Supply Chain Management Common Approval Framework.

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Description

Event Description	If the work order workflow approval option is enabled for a business unit or work order type, then when a user creates the work order and clicks the Submit for Approval button, the system triggers the approval workflow process.
Action Description	A user initiates the Work Order Approval process by clicking the Submit for Approval button. The user can access the approval map prior to submitting the work order for approval. The approval tasks are routed to each of the approvers to enable them to approve or deny the work order. If the approver approves the work order, the approval task is routed to the next approver, if needed. If the approver denies the work order, the Work Order Approval process is terminated. The user who submitted the work order for approval is notified of the denial and can optionally revise the work order and initiate the Work Order Approval process again. Users can also add ad hoc reviewers and approvers to the approval flow for a work order.
Notification Method	Worklist item and email.

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APPENDIX C

PeopleSoft Maintenance Management Reports

This appendix provides an overview of Oracle's PeopleSoft Enterprise Maintenance Management reports and enables you to view summary tables of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Using PeopleSoft Applications

PeopleSoft Maintenance Management Reports: A to Z

These tables list Oracle's PeopleSoft Enterprise Maintenance Management Maintenance Management reports, sorted alphanumerically by report ID. The reports listed are all Crystal reports. If you need more information about a report, refer to the report details at the end of this appendix.

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Report ID and Report Name	Description	Navigation	Run Control Page
WM10001 Work Order Task Detail Report	Lists work order task detail information for each work order task. The report displays different sections depending on the selected reporting options. These reporting options are: Labor Assignment Report, Material Assignment Report, Procurement/On-hand Report, Tool Assignment Report, Instruction Report, Check List Report, Work Order Notes Report, Task Notes Report, and Equipment Parts List. When there is no information available for the selected reporting option for the selected tasks, the report does not include the corresponding report section. See Appendix C, "PeopleSoft Maintenance Management Reports," WM10001 - Work Order Task Detail Report, page 678.	• Maintenance Management, Work Order Management, Work Order, Work Order Click Print on the Work Order page. • Maintenance Management, Workbenches, Scheduling Workbench, <scheduler's name> Workbench Click Print on the <scheduler's name> Workbench page. • Maintenance Management, Workbenches, Technician Workbench, <technician's name> Workbench Click Print on the <technician's name> Workbench page.	WM_RPT_OPTNS

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Report ID and Report Name	Description	Navigation	Run Control Page
WM10001 Work Order Task Detail Report (run from run control page)	Lists work order task detail information for work order tasks that meet the selection criteria on the Work Order Task Detail Report Options run control page. The report displays different sections depending on the selected reporting options. These reporting options are: Labor Assignment Report, Material Assignment Report, Procurement/On-hand Report, Tool Assignment Report, Instruction Report, Check List Report, Work Order Notes Report, Task Notes Report, and Equipment Parts List. When there is no information available for the selected reporting option for the selected tasks, the report does not include the corresponding report section. See Appendix C, "PeopleSoft Maintenance Management Reports," WM10001 - Work Order Task Detail Report, page 678.	Maintenance Management, Work Order Management, Print Work Order, Work Order Task Detail Report Options	WM_WO_RPT
WM11000 Work Order Task Material Readiness Report	Describes the ongoing availability of needed inventory materials and other non-inventory/procured material items and services. The report indicates, for scheduled work order tasks selected over an (expected) relatively tight analysis date range, whether the tasks are material ready or not, and with the optional identification of any item exceptions that are not ready accompanied by an explanatory reason.	Maintenance Management, Inquiries and Reports, Material Readiness Report	WM_WO_MATREADY_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
WM20000 Preventive Maintenance Report	List all preventive maintenance (PM) schedule transactions that match the search criteria on the Preventive Maintenance Inquiry page. The report shows the maintenance percentage for each PM schedule, the next due reading, and the due date. The report shows work order information if a work order exists for the PM schedule transaction.	Maintenance Management, Preventive Maintenance, View Preventive Maintenance, Preventive Maintenance Inquiry Click Print on the Preventive Maintenance Inquiry page.	WM_PM
WM20001 Preventive Maintenance by Process Instance Report	Lists all PM schedule transactions that were processed in a specific process instance of the Preventive Maintenance process (WM_PM) and shows the maintenance percentage. The report displays the due reading and due date, the asset description, tag number, and serial ID fields. It also includes work order information if the process created a work order.	Maintenance Management, Preventive Maintenance, Run Preventive Maintenance, Selection	WM_PM_RUN_SEL
WM20002 PM Projection Report	Displays projection information, which includes the work order and Asset Management business units, asset, asset location, type, asset description, tag number, serial ID, due date, setID, loop, and projection ID after running the Projection process.	Maintenance Management, Preventive Maintenance, Run Projection	WM_PM_RUN_SEL
WM30000 Crew Availability Report	Provides information on the crew's base capacity, adjusted capacity hours, target load, confirmed scheduled hours, scheduled hours, variance between the confirmed scheduled hours and scheduled hours and the percentage of scheduled hours, availability, and target load by Business Unit, Shop, Crew, period and lead craft.	Maintenance Management, Inquiries and Reports, Crew Schedule Reports, Capacity Report	WM_CREW_CAPACI_REQ

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Report ID and Report Name	Description	Navigation	Run Control Page
WM30001 Crew Schedule (and Assignment) Report	Describes the load of work by craft within each crew and includes the work order, task, status, priority, target equipment and the hours assigned to a craft in the specified schedule period by business unit and shop. It also describes employee task assignments, scheduled start and end dates and times, and actual hours worked. It also shows the employee ID, name and scheduled start/end date time when include detail option is selected when requesting the report to run. If the Include Detail check box is not selected, the report will not display crew assignments.	Maintenance Management, Inquiries and Reports, Crew Schedule Reports, Schedule and Assignment Report	WM_CREW_SCHED_REQ
WM30003 Maintenance Schedule Completion Report	. The report show the completion status of all the work order tasks that were scheduled for the crew to complete in the schedule periods and all unplanned/ emergency tasks assigned to crew during those periods. This report helps users measure how well the crews comply with the schedule for the schedule period. Users should be able to determine the following: 1) Unscheduled/emergency work that are completed within the period— For example, when completed scheduled hours are zero and completed hours are not zero. These tasks are identified by the Unplanned Column on the report. 2) Completed Scheduled Work —For example, when both completed scheduled hours and completed hours are greater than zero. 3) Scheduled Work that is not completed and becomes carryover work (These tasks are indicated by the Carryover column on the report).	Maintenance Management, Inquiries and Reports, Crew Schedule Reports, Schedule Completion Report	WM_SCHED_RPT_REQ

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Report ID and Report Name	Description	Navigation	Run Control Page
WM30004 Unscheduled Report	Lists all the work orders currently not scheduled to crews. It is used for review during the scheduling meeting and lists work orders by business unit, shop, and preferred crew.	Maintenance Management, Inquiries and Reports, Crew Schedule Reports, Crew Unscheduled Work Report	WM_UNSCHEDULED_REQ
WM30005 Crew Carryover Work Report	Lists the crew scheduled work orders not yet completed by the targeted date, which should be rescheduled / carried over to the next period. It displays the assigned craft, schedule dates, and carryover hours by business unit, shop, and crew.	Maintenance Management, Inquiries and Reports, Crew Schedule Reports, Crew Carry Over Work Report	WM_CARRYOVER_REQ
WM50000 Warranty Claim	Shows the current warranty claim information. It displays the claim sender information, the vendor contact information, a list of failure and cost details, and the supporting meter readings.	Maintenance Management, Warranty Claim, Update Warranty Claim, Claim Summary Click Print on the Claim Summary page.	WM_CLAIM_HDR

PeopleSoft Maintenance Management Selected Reports

This section provides detailed information about individual reports. The reports are listed alphabetically by report ID.

WM10001 - Work Order Task Detail Report

The report include several sections depending on the reporting option that you select on the Work Order Task Detail Report Options page. The report includes each section only if there is corresponding information in the system. These are the report sections:

- Work Order Notes: Select Work Order Notes Report check box on the Work Order Task Detail Report Options page to include this section.

  Displays work order header notes.

- Work Order Task Labor Schedule: Select Labor Assignment Report check box on the Work Order Task Detail Report Options page to include this section.

  Lists the staffing assignments including scheduled and actual start and end dates.

- Work Order Task Inventory Schedule: Select Material Assignment Report check box on the Work Order Task Detail Report Options page to include this section.

  Lists the materials assigned to the work order and work order tasks.

- Work Order Task Purchase/On-hand: Select Procurement On-hand Report check box on the Work Order Task Detail Report Options page to include this section.

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Lists the procured materials assigned to the work order and work order tasks.

- Work Order Task Tools Schedule: Select Tools Assignment Report check box on the Work Order Task Detail Report Options page to include this section.

  Lists the tools assigned to the work order tasks, including the asset, scheduled dates, and actual start and end dates information.

- Work Order Task Instructions: Select Instructions Report check box on the Work Order Task Detail Report Options page to include this section.

  Lists the instructions associated with the work order and work order tasks, including sequence and step information.

- Work Order Task Checklist: Select Check List Report check box on the Work Order Task Detail Report Options page to include this section.

  Lists the check lists related to the work order and work order tasks, including sequence and step information.

- Work Order Task Notes: Select Work Order Task Notes Report check box on the Work Order Task Detail Report Options page to include this section.

  Displays work order task notes.

- Equipment Part List: Select Equipment Parts List to include this section.

  Lists equipment parts, quantity required, and unit of measure (UOM).

If you run the report from the Work Order page, it contains the information for each work order task associated with the work order. If you run the report from the scheduler's workbench or the technician's workbench, it contains information for each selected work order task.

If you run the report from the Work Order Task Detail Report Options run control page, it includes information for all work order tasks for the work orders that meet the selection criteria in the Report Request Parameters group box.

Note. To print bar codes, you must install the appropriate barcode font, such as Code 39 True Type Font, on the process scheduler.

See Also

Chapter 21, "Executing and Completing Work Orders," Printing Work Order Tasks Detail Reports, page 620

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Glossary of PeopleSoft Enterprise Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

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budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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