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A. Organization

1. Plant Maintenance

1.1. Maintenance Planning Plant

Questions:

Q: 1) How maintenance will be planned within your company?

A:

1.2. Maintenance Plant

Questions:

Q: 1) Do you want to set up plants specifically for maintenance requirements (in addition to the common logistics plants)?

A:

Q: 2) How is capacity planning performed in your maintenance plants?

A:

Q: 3) How are maintenance spares stored?

A:

1.3. Plant Section

Questions:

Q: 1) Are certain types of maintenance work planned or executed with consideration to the plant sections?

A:

1.4. Location

Questions:

Q: 1) Do you subdivide your maintenance plant in locations to facilitate the maintenance job or for purpose of reporting?

A:

1.5. Maintenance Planner Group

Questions:

Q: 1) How is maintenance work organized?

A:

Q: 2) How are the maintenance teams / labor resources organized?

A:

B. Master Data

1. Plant Maintenance

1.1. Technical Objects (Structuring of Technical Systems)

Questions:

Q: 1) How should your technical systems be structured?

A:

Q: 2) What kinds of technical objects do you handle (for example, objects that can be dismantled or used for different purposes in different production stages etc.)?

A:

Q: 3) How is information about technical objects organized and stored in your company (for example, via EDV, file cards or no information at all)?

A:

1.1.1. Functional Location

Questions:

Q: 1) Do you manage objects that are immovable and that usually have a long operational life (for example, clarification plants)?

A:

Q: 2) Do you require additional functionality to structure your maintenance objects?

A: Yes
 No

Q: 3) If yes, which objects need to be represented with functional locations?

A:

Q: 4) What do the hierarchy levels of the functional locations represent (for example, cost center levels, production process levels)?

A:

Q: 5) Is the hierarchy for functional locations structured according to spatial, functional or technical viewpoints?

A:

Q: 6) How detailed should the functional location hierarchy be (for example, number of levels, installation and dismantling of equipment)?

A:

Q: 7) At what level(s) of the hierarchy should data be entered?

A:

Q: 8) How detailed should the last level of the hierarchy for functional locations be?

A:

Q: 9) Is it sometimes the case in your company that functional location numbers change (for example, if you assign part of a technical system to another technical system)?

A:

Q: 10) Do you need to assign different numbers to functional locations (for example, (a) from a procedural perspective and (b) from a measurement/control system perspective)?

A:

Q: 11) How should the different levels be linked together with regard to the transfer of data?

A:

Q: 12) Do you need to link documents to functional locations?

A: Yes
 No

Q: 13) Do you need to record the performance of functional locations using measuring points and counters?

A: Yes
 No

Q: 14) If yes, is counter reading data transferred between the different levels?

A: Yes
 No

Q: 15) Do you track warranties? If yes, are you a guarantor, a warrantee, or both?

A:

Q: 16) Do you want to obtain a note on the warranty automatically for a positive warranty check result?

A:

Q: 17) Do you classify functional locations? If yes, how?

A:

Q: 18) Do you want to analyze what influence the usage conditions have on the susceptibility to damage of the installed equipment?

A:

Q: 19) Do you need to document your technical objects according to their usage time for functional locations?

A:

Q: 20) Do you determine the business partners (internal and/or external) whose address(es) you require, if you need maintenance requests for a particular functional location?

A:

Q: 21) Do you want to archive master records for functional locations? If yes, provide a copy of your document archiving procedure. If this is not available, describe specific archiving requirements.

A:

Q: 22) Do you want to make the screen templates for processing technical objects (functional location, equipment) user-specific?

A:

1.1.2. Equipment

Questions:

Q: 1) Which maintenance objects must be entered as equipment master data?

A:

Q: 2) List and describe the different categories of equipment that you maintain.

A:

Q: 3) How many pieces of equipment do you expect to manage in your system?

A:

Q: 4) Is each individual piece of equipment in your company identified by a serial number (by your production department and/or by the manufacturer)?

A:

Q: 5) Do you want to create your own serial numbers or do you use the serial number of the manufacturer as a reference/key for that object?

A:

Q: 6) If you use serial numbers, on which level do you want to track their history (including costing, statistics, and so on)?

A:

Q: 7) Does your equipment include particular assemblies that you want to handle individually in order to perform damage and cost analyses? Describe them.

A:

Q: 8) Do you represent the different types of equipment using material master records in conjunction with Materials Management (for example, inventory management, goods movements)?

A: Yes
 No

Q: 9) Does your equipment include larger components that you want to handle individually, in order to create damage and cost analyses for them?

A:

Q: 10) Specify business partners (internal and/or external) for whom you require an address when you need maintenance requests for a particular piece of equipment.

A:

Q: 11) Add other partners to the list, if necessary.

A:

Q: 12) Do you need to link documents (for example, drawings, manuals) to equipment master records? If yes, give some examples.

A: Yes
 No

Q: 13) Do you measure and log the current condition of the equipment in the system (for example, temperature, pressure, operating time)? If yes, describe the measuring points and counters, which you use for different pieces of equipment.

A:

Q: 14) Do you track warranties? If yes, are you a guarantor, a warrantee, or both?

A:

Q: 15) Describe the different warranties for your equipment, and specify whether these should be recorded individually for each piece of equipment.

A:

Q: 16) Do you want to obtain a note on the warranty automatically for a positive warranty check result?

A:

Q: 17) Does a technician in your company require a special work permit before starting work on specific equipment?

A:

Q: 18) Does old data (for example, equipment master records, repair histories or information about technical objects) have to be transferred? Give a typical example.

A:

Q: 19) Do you classify equipment? If yes, how?

A:

Q: 20) Are some pieces of equipment created as production resources/tools?

A: Yes
 No

Q: 21) Which changes to equipment do you want to document with a usage list?

A:

Q: 22) Do you want to make the screen templates for processing technical objects (functional location, equipment) user-specific?

A:

Q: 23) Do you want to generate/change a related asset automatically when creating/changing a piece of equipment, and/or vice-versa?

A:

Q: 24) Do you want to archive equipment master records? If yes, provide a copy of your document archiving procedure. If this is not available, describe specific archiving requirements.

A:

1.1.3. Fleet Object

Questions:

Q: 1) Which maintenance objects must be entered as equipment master data?

A:

Q: 2) List and describe the different categories of equipment that you maintain.

A:

Q: 3) How many pieces of equipment do you expect to manage in your system?

A:

Q: 4) Is each individual piece of equipment in your company identified by a serial number (by your production department and/or by the manufacturer)?

A:

Q: 5) Do you want to create your own serial numbers or do you use the serial number of the manufacturer as a reference/key for that object?

A:

Q: 6) If you use serial numbers, on which level do you want to track their history (including costing, statistics, and so on)?

A:

Q: 7) Does your equipment include particular assemblies that you want to handle individually in order to perform damage and cost analyses? Describe them.

A:

Q: 8) Do you represent the different types of equipment using material master records in conjunction with Materials Management (for example, inventory management, goods movements)?

A: Yes
 No

Q: 9) Does your equipment include larger components that you want to handle individually, in order to create damage and cost analyses for them?

A:

Q: 10) Specify business partners (internal and/or external) for whom you require an address when you need maintenance requests for a particular piece of equipment.

A:

Q: 11) Add other partners to the list, if necessary.

A:

Q: 12) Do you need to link documents (for example, drawings, manuals) to equipment master records? If yes, give some examples.

A: Yes
 No

Q: 13) Do you measure and log the current condition of the equipment in the system (for example, temperature, pressure, operating time)? If yes, describe the measuring points and counters, which you use for different pieces of equipment.

A:

Q: 14) Do you track warranties? If yes, are you a guarantor, a warrantee, or both?

A:

Q: 15) Describe the different warranties for your equipment, and specify whether these should be recorded individually for each piece of equipment.

A:

Q: 16) Do you want to obtain a note on the warranty automatically for a positive warranty check result?

A:

Q: 17) Does a technician in your company require a special work permit before starting work on specific equipment?

A:

Q: 18) Does old data (for example, equipment master records, repair histories or information about technical objects) have to be transferred? Give a typical example.

A:

Q: 19) Do you classify equipment? If yes, how?

A:

Q: 20) Which changes to equipment do you want to document with a usage list?

A:

Q: 21) Do you want to make the screen templates for processing technical objects (functional location, equipment) user-specific?

A:

Q: 22) Do you want to archive equipment master records? If yes, provide a copy of your document archiving procedure. If this is not available, describe specific archiving requirements.

A:

Q: 23) Which types of fleet objects do you want to manage?

A:

Q: 24) Which data do you want to see/maintain within the fleet object?

A:

Q: 25) Which types of utilities and consumables do you want to maintain?

A:

Q: 26) For what purpose do you intend to use your fleet objects?

A:

Q: 27) Which engine types do your fleet objects have? Do you want to maintain these?

A:

Q: 28) Which unit of consumption do you require?

A:

Q: 29) Which counter types do you require (for example, kilometer counter, consumption counter, time counter and so on)?

A:

Q: 30) How do you want to name your counters?

A:

Q: 31) How do you want to calculate your consumption?

A:

1.1.4. Production Resource/Tool as Equipment

Questions:

Q: 1) Do you want to make the screen templates for processing technical objects (functional location, equipment) user-specific?

A:

Q: 2) Do you want to generate/change a related asset automatically when creating/changing a piece of equipment, and/or vice-versa?

A:

Q: 3) What kind of production resources/tools do you require?

A:

Q: 4) Do you want to manage your production resources/tools by quantity alone or also based on localization, value, responsible person etc.?

A:

Q: 5) Do you use production resources/tools which have to be checked or calibrated regularly?

A:

1.1.5. Reference Functional Location

Questions:

Q: 1) Do you have many similar technical structures in your organization?

A:

Q: 2) Do you have standardized functional location structures that should be represented as reference functional locations?

A: Yes
 No

Q: 3) According to which criteria do you intend to structure your functional location hierarchies (for example geographical, functional or technical aspects)?

A:

1.1.6. Bill of Material for Functional Location

Questions:

Q: 1) Will you use functional location BOMs?

A: Yes
 No

Q: 2) How are they structured?

A:

Q: 3) Will you need to use engineering change management to control BOM changes?

A: Yes
 No

1.1.7. Equipment Bill of Material

Questions:

Q: 1) Do you have structures for special sub-items?

A: Yes
 No

Q: 2) If yes, are they pieces of equipment that you want to trace on monitor?

A: Yes
 No

Q: 3) If you use equipment hierarchies, describe some examples of when and how they are structured.

A:

Q: 4) Does your equipment include larger components that you want to handle individually, in order to create damage and cost analyses for them?

A:

Q: 5) Do you currently have equipment BOMs (spare parts lists)?

A: Yes
 No

Q: 6) If so, are they stored electronically?

A: Yes
 No

Q: 7) How are equipment BOMs structured?

A:

Q: 8) How are BOMs linked to equipment masters?

A:

Q: 9) Will you need to use Engineering Change Management to manage your BOMs?

A: Yes
 No

Q: 10) Do you also construct BOMs with alternative materials?

A: Yes
 No

Q: 11) Do you use variant configuration?

A: Yes
 No

1.1.8. Object Link

Questions:

Q: 1) Do you want to define and represent horizontal object links?

A:

Q: 2) If so, for which of the following objects do you want to display the links?

A:

Q: 3) Which types of relationship exist between the linked objects (1:1, 1:n, n:n)?

A:

1.1.9. Installed Base

Questions:

Q: 1) Do you want to use IBase management (a) purely for documentation and management of an object structure (ie. a production process) or (b) as a limited substitute for bills of material?

A:

Q: 2) Which object types are part of your installed base hierarchy?

A:

1.2. Task Lists

Questions:

Q: 1) Do you have work plans for service tasks in your current IT system or databases?

A:

Q: 2) Do you want to archive maintenance task lists? If so, please provide a copy of your document archiving policy if available. If this is not available, please describe specific archiving requirements.

A:

1.2.1. General Task List

Questions:

Q: 1) Do you require configurable task lists?

A:

Q: 2) Do you classify general task lists? If yes, how?

A:

Q: 3) How do you group your general task lists?

A:

1.3. Maintenance Plans

Questions:

Q: 1) How will you create maintenance plans (e.g., representing individual maintenance items or by grouping a number of maintenance items)?

A:

Q: 2) Will you plan the preventive maintenance separately for each maintenance equipment or will you establish a preventive maintenance plan for a group of maintenance objects (e.g., one plan for a production line that consists of several pieces of equipment)?

A:

Q: 3) Do you have different frequencies for the execution of your maintenance tasks and would you like to have all of them in just one maintenance plan?

A:

Q: 4) If the maintenance plans generate service entry sheets for a MM external management, should they be directly created by the plans or after the orders are created/released?

A:

Q: 5) For what types of service object do you create maintenance items?

A:

Q: 6) Will you have pre-defined activity lists (task lists) for your different preventive maintenance services that list the required work steps (including estimated work time), spare parts and/or tools?

A:

Q: 7) If yes, are those activity lists specific for the different equipment types (machine types) or different functional locations for which you offer preventive maintenance?

A:

Q: 8) Do you want to archive maintenance plans? If so, please provide a copy of your document archiving policy if available. If this is not available, please describe specific archiving requirements.

A:

1.3.1. Single Cycle Plan

Questions:

Q: 1) What criterion is the maintenance cycle based on for the single cycle maintenance plan?

A:

Q: 2) What character does the cycle have?

A:

1.3.2. Multiple Counter Plan

Questions:

Q: 1) Should just performance-based (counter-based) or also time-based maintenance cycles be integrated into the multiple counter-based maintenance plan?

A:

Q: 2) Do you use cycle sets for the attachment of multiple counter plans?

A:

Q: 3) Which counters for which technical objects (functional locations, equipment) should be assigned to the individual maintenance cycles?

A:

Q: 4) Which time-base should be used (for example, calendar, factory calendar, key dates)?

A:

Q: 5) If a preventive maintenance activity is completed early (before the planned date) or late (after the planned date), do you then also shift the next planned preventive maintenance activities for the same equipment?

A:

Q: 6) When should preventive maintenance tasks appear in your order backlog?

A:

Q: 7) List the different maintenance cycles, on which the scheduling of preventive maintenance activities should be based.

A:

Q: 8) Do you want to plan maintenance independently of your hierarchy of technical objects?

A:

1.3.3. Strategy Plan

Questions:

Q: 1) What criterion is the maintenance cycle based on for the strategy-based maintenance plan?

A:

Q: 2) Which time-base should be used (for example, calendar, factory calendar, key dates)?

A:

Q: 3) If a preventive maintenance activity is completed early (before the planned date) or late (after the planned date), do you then also shift the next planned preventive maintenance activities for the same equipment?

A:

Q: 4) When should preventive maintenance tasks appear in your order backlog?

A:

Q: 5) List the different maintenance cycles, on which the scheduling of preventive maintenance activities should be based.

A:

Q: 6) Do you want to plan maintenance independently of your hierarchy of technical objects?

A:

1.4. Solution Database

Questions:

Q: 1) Do you possess technical objects that are required for detailed technical information in order to introduce necessary error handling?

A:

Q: 2) Is the offer of a solution database helpful for the notification processor?

A:

Q: 3) Do recurring problems constantly appear during notification processing that are linked with a complex solution process?

A:

Q: 4) Is there a bottleneck in specialist knowledge in your area?

A:

Q: 5) Is error diagnosis an essential step in your area or is it "only" used for short-term error handling?

A:

Q: 6) Are you already using (computer-supported) Help for error analysis and handling based on a knowledge or error database?

A:

1.4.1. Symptom

Questions:

Q: 1) Structure existing problems based on criteria?

A:

1.5. Additional Master Data

1.5.1. Warranty

Questions:

Q: 1) Do you track warranties? If yes, are you a guarantor, a warrantee, or both?

A:

Q: 2) Which materials contain warranty agreements?

A:

Q: 3) To which objects should warranties be assigned?

A:

Q: 4) Describe the different warranties for your objects and specify whether these should be listed individually for each object.

A:

Q: 5) What is the current procedure? Automatically or manually?

A:

Q: 6) Do you want to obtain a note on the warranty automatically for a positive warranty check result?

A:

Q: 7) Which warranty counters are used?

A:

1.5.2. Counter/Measuring Point

Questions:

Q: 1) Do you need to record the performance of functional locations using measuring points and counters?

A: Yes
 No

Q: 2) If yes, is counter reading data transferred between the different levels?

A: Yes
 No

Q: 3) Do you measure and log the current condition of the equipment in the system (for example, temperature, pressure, operating time)? If yes, describe the measuring points and counters, which you use for different pieces of equipment.

A:

1.5.3. Revision

Questions:

Q: 1) Is there any revision planned where a production line or plant has to be shut down for a certain time?

A:

1.5.4. Catalog

Questions:

Q: 1) Do you want to create an inspection catalog of characteristic features, causes of defects, and usage decisions that occur when maintenance work is executed?

A:

Q: 2) Describe your current catalogs and their structure.

A:

1.5.5. Permit

Questions:

Q: 1) Do you consider permits in connection with orders, for example, with regard to working conditions or safety aspects? If yes, describe your permit procedures.

A:

Q: 2) If yes, who in your company is authorized to issue permits?

A:

C. Business Processes

1. Plant Maintenance

Questions:

Q: 1) Do you want to transfer the maintenance history from your current system to SAP R/3?

A:

Q: 2) If yes, to which of these objects should the data be transferred?

A: Historical orders
 Work orders
 Notifications (activity report)

Q: 3) Could your maintenance organization operate as a profit center (as opposed to a cost center)?

A:

Q: 4) How do you process maintenance costs (for example, settlement to cost center)?

A:

Q: 5) Is any part of your maintenance organization outsourced (or will it be in the future)?

A:

Q: 6) Are certain maintenance activities always performed by external contractors? If yes, describe these types of maintenance work.

A:

Q: 7) Do you want to set up a workflow for the processing of notifications and/or orders?

A:

1.1. Breakdown Maintenance Processing

1.1.1. Notification

1.1.1.1. Notification Creation/Processing

Questions:

Q: 1) Who in your organization is responsible for identifying maintenance work?

A:

Q: 2) Who in your organization is responsible for processing identified work?

A:

Q: 3) How do you prioritize identified work?

A:

Q: 4) Are you restricted to a certain period of time when executing these tasks?

A:

Q: 5) List the business partners (internal and/or external) whose address information you require when creating the notification. Add other business partners, if necessary.

A: Owner of technical object
 Operator of technical object
 Person responsible in your enterprise organization
 Other

Q: 6) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 7) Do you want information about the reference object displayed automatically when a notification is created? If yes, what information?

A:

Q: 8) How do you describe a problem? Do you enter a verbal problem description or do you use standardized codes, for example, to determine the damage, cause of damage, or object part?

A:

Q: 9) Do you want to link digitalized documents to notifications?

A: Yes
 No

Q: 10) Do you assign a responsible person to each task?

A:

Q: 11) Should the person responsible for a task be informed automatically by the system?

A:

Q: 12) How do you want to configure the interface for your notification with regard to control data, breakdown data, activity data, and task data?

A:

Q: 13) Do you have standard tasks that you always perform for different types of notifications? If yes, please describe them in detail.

A:

Q: 14) Do you record the performed activities that solved the customer problem in a standardized way (for example, using standardized codes) in order to evaluate possible solutions for a problem?

A:

Q: 15) Do you want to set up an escalation workflow for notifications and tasks?

A:

Q: 16) Do you want to use paging in your company as an additional form of communication?

A:

Q: 17) How and when are notifications completed?

A:

1.1.1.2. Task Definition

Questions:

Q: 1) How do you plan the processing of a maintenance notification? Do you use tasks during processing?

A:

Q: 2) If you use notification tasks, give some examples.

A:

Q: 3) Who is responsible for performing a maintenance task?

A:

Q: 4) Do predefined follow-up tasks result automatically from completed tasks?

A:

Q: 5) Is there a set procedure for how you react to malfunctions?

A:

Q: 6) Do you perform maintenance work with or without entering costs?

A:

1.1.1.3. Notification Printing

Questions:

Q: 1) Do you print notifications?

A: Yes
 No

Q: 2) Provide some examples of the output format(s) for notifications.

1.1.1.4. Entry of Technical Findings

Questions:

Q: 1) Do you record technical information (for example, which part of the equipment was broken, damage, cause of damage) about a maintenance problem in order to create a service history or to enable further evaluations?

A: Yes
 No

Q: 2) Which technical data should be recorded and who is responsible?

A:

Q: 3) When do you document technical findings?

A:

Q: 4) Do you want to have a coding system, which allows standardized entry of technical information? If yes, list the different categories (for example, damage), for which you want to have codes.

A:

1.1.1.5. Notification Archiving

Questions:

Q: 1) Describe your specific archiving requirements.

A:

Q: 2) Do you want to archive notifications? If so, provide a copy of your document archiving policy. If this is not available, please describe specific archiving requirements.

A:

1.1.2. Order

1.1.2.1. Order Creation/Processing

Questions:

Q: 1) What different types of maintenance do you have in your company (for example, preventive maintenance, repair, installation)? Create a list of the maintenance types and outline the differences in planning and execution.

A:

Q: 2) Mark in the following list whether maintenance tasks are performed by employees and/or contractors.

A:

Q: 3) What information about labor resources (for example, availability and number of people, duration of work, split of operation) do you require from the system when planning maintenance orders?

A:

Q: 4) How do you proceed with an external assignment with the sub-contractor? Choose one or more of the following options.

A:

Q: 5) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 6) Will several technicians work on the same maintenance task?

A: Yes
 No

Q: 7) Do you want to assign individual operations to particular people?

A:

Q: 8) Do you want to configure a special search help for partners in your order?

A:

Q: 9) For which operation types do you want to represent the operation description using service specifications?

A:

Q: 10) Do you want to define skills and/or qualifications for maintenance order operations?

A: Yes
 No

Q: 11) Do you provide the technicians who perform the preventive maintenance with a list of activities? If yes, how detailed are they?

A:

Q: 12) Do you use pre-defined task lists in work order planning?

A: Yes
 No

Q: 13) If yes, which of the following types of task lists do you require?

A:

Q: 14) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 15) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 16) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 17) Do you want to generate purchase requisitions and reservations when the order is created?

A:

Q: 18) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 19) Do you want to generate collective purchase requisitions or individual purchase requisitions for each external item?

A:

Q: 20) How do you want to plan special tools, documents and so on, which are required to execute maintenance activities?

A:

Q: 21) Do you use work order permits, for example, to manage working conditions or safety matters?

A: Yes
 No

Q: 22) At what intervals do you want to schedule work (for example, daily, weekly, monthly)?

A:

Q: 23) How do you want to prioritize work?

A:

Q: 24) At which level do you plan work (for example, for a shift, crew, skill, qualification, or an individual person and so on)?

A:

Q: 25) How detailed is your planning (for example, usage backlog, capacity evaluation, capacity scheduling)?

A:

Q: 26) Should the capacity load, which was formed for all the capacity types of the PP work centers, be reduced for the duration of a maintenance task planned in a work order?

A:

Q: 27) Do you want to use paging in your company as an additional form of communication?

A:

Q: 28) Do you use maintenance orders for processing investment measures? If yes, should the asset under construction be created automatically or manually?

A:

Q: 29) Do you want the maintenance order to be integrated with one of the following Controlling components?

A:

1.1.2.2. Material Planning

Questions:

Q: 1) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 2) Who performs material planning for orders in your company?

A:

Q: 3) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 4) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 5) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 6) Is there an approval procedure for external purchase orders and material withdrawals? If yes, describe it.

A:

1.1.2.3. Order Permit

Questions:

Q: 1) Do you consider permits in connection with orders, for example, with regard to working conditions or safety aspects? If yes, describe your permit procedures.

A:

Q: 2) If yes, who in your company is authorized to issue permits?

A:

1.1.2.4. Order Release

Questions:

Q: 1) Who in your organization is allowed to release maintenance orders (for example, maintenance planner, dispatcher)?

A:

Q: 2) Do you need to restrict the release until a process is completed or authorization obtained? If yes, describe the process.

A:

Q: 3) Are there instances where orders should be released automatically?

A:

1.1.2.5. Work Clearance Management

Questions:

Q: 1) What should be the relationship between the objects in Work Clearance Management (order, work approval, work clearance application, work clearance document and so on)?

A:

Q: 2) Do conflicts exist between the conditions of different technical objects? Define these.

A:

Q: 3) Which different approval steps are required for your work clearance process? Describe the concept or process flow of your approval process.

A:

Q: 4) Which employee is responsible for which types of approvals? Describe the applications.

A:

Q: 5) Which employee should be informed about which subject or object condition at which time?

A:

Q: 6) Should the employees involved later in the approval process be informed automatically of the progress of previous approval levels (Workflow)?

A:

1.1.2.6. Order Printing

Questions:

Q: 1) Identify the internal papers that you require for the different people and order types involved (for example, job ticket for employee, picking list).

A:

Q: 2) Provide some representative layout examples.

Q: 3) Do you assign printers to the people involved?

A:

1.1.2.7. Order Execution

Questions:

Q: 1) Note: This process is only for maintenance activities performed manually on technical systems by the technician.

A:

Q: 2) How is material withdrawn for the order?

A:

Q: 3) Do you work with closed or open warehouses?

A:

Q: 4) Should the warehouse be informed of imminent material withdrawals using a material availability slip?

A:

1.1.3. Capacity Planning

1.1.3.1. Capacity Evaluation

Questions:

Q: 1) Is it necessary to determine if a person is available to do a task? (If yes, consider using employee shift scheduling.)

A:

Q: 2) Do you want to change capacity/work centers for periods with overload? (If yes, consider changing the work center/assignment/activity dates manually from the evaluation reports.)

A:

Q: 3) Do you do short term capacity planning? (If yes, ensure the time horizon for the capacity evaluation reflects the appropriate time period. If no, ensure the time horizon for the capacity evaluation reflects the appropriate time period.)

A:

Q: 4) Do you utilize your personnel resources/capacities per process or enterprise-wide? (If yes, consider using work center hierarchies.)

A:

Q: 5) Are resources to be shared across departments (for example plant maintenance and projects)?

A:

Q: 6) Which order type do you want to use for capacity evaluation?

A:

1.1.3.2. Capacity Dispatching and Leveling

Questions:

Q: 1) Do you process the overload on capacities/wk centers? (If yes, you could use the capacity leveling functions- dispatching and deallocating).

A:

Q: 2) Do you prefer to use a graphical planning tool for capacity leveling? (If yes, use the graphical capacity planning tool If no, consider using the tabular capacity planning tool.)

A:

Q: 3) Do you want to assign available capacities to order operations?

A: Yes
 No

Q: 4) When you split order operations, do you want the system to create capacity loads automatically for individual people?

A:

Q: 5) Which type of planning table do you want to use?

A:

Q: 6) Which planning strategies will you use for Sequencing?

A:

1.1.4. Modification of Technical Systems

1.1.4.1. Installation, Dismantling and Modification of Equipment

Questions:

Q: 1) Are installation operations in your company performed by your own technicians or assigned externally?

A:

Q: 2) How are dismantling procedures performed at your company?

A:

Q: 3) Which components are exchanged?

A:

Q: 4) Are dismantled parts refurbished? If yes, describe the refurbishment process.

A:

Q: 5) Should a history be managed for the exchanged parts?

A:

Q: 6) Who documents the modification of a technical system and when?

A:

Q: 7) Do changes also have to be made to the system master during modification work?

A:

1.1.5. Material Movements

1.1.5.1. Goods Issue Processing

Questions:

Q: 1) Who posts the goods issue?

A:

Q: 2) How do you record materials issued from stores?

A:

Q: 3) How do you document materials supplied by the subcontractors?

A:

Q: 4) How will the consumption of these parts be recorded and who will post their withdrawal in the system?

A:

Q: 5) How do you document materials that are ordered for specific work orders?

A:

Q: 6) How do you wish to document which materials were received specifically for a work order?

A:

Q: 7) How much time elapses between the actual goods issue and its posting in the system?

A:

Q: 8) Is the posting made online or in batch mode?

A:

Q: 9) Are deliveries posted individually or for each group of goods issues?

A:

Q: 10) Is stock posted to the receiving site? If so, which type of stock (stock in transit, available stock, etc.)?

A:

Q: 11) Which documents are generated in conjunction with this posting and what information do they contain?

A:

1.1.6. Completion Confirmation

Questions:

Q: 1) Do you or your employees enter completion confirmations of time?

A:

Q: 2) Who confirms orders in your company?

A:

Q: 3) Are the completion confirmations in your company entered at the level of personnel number?

A:

Q: 4) Should the superior approve the times recorded by the employees?

A:

Q: 5) Do you also want to confirm used material at the same time as the time confirmation?

A:

Q: 6) Should the technical completion (for example, for breakdown times, causes of damage, tasks and so on) be made at the same time as the time confirmation?

A:

Q: 7) Do you also want to enter measurement readings with the completion confirmation?

A:

Q: 8) Do you use the integration with the HR module?

A: Yes
 No

Q: 9) Do you create completion confirmations centrally, or does each employee enter their own times themselves?

A:

Q: 10) Do you issue confirmation slips to your employees?

A:

Q: 11) How many times per day do your employees enter their working time?

A:

Q: 12) Will you use a Plant Data Collection (PDC) system for your completion confirmations?

A:

Q: 13) Do you enter the working times of contractors? If yes, how should the external services be entered?

A:

1.1.6.1. Individual Time Confirmation

Questions:

Q: 1) Do you enter the absolute duration or period of time (from...to)?

A:

Q: 2) Do you differentiate the times entered according to other activity types (for example, to distinguish between normal work hours and overtime)?

A:

Q: 3) Is the confirmation of your services person-based?

A:

Q: 4) In what unit and with what accuracy do you want to enter services?

A:

1.1.6.2. Overall Completion Confirmation

Questions:

Q: 1) Which employees confirm which data?

A:

Q: 2) Are internal services confirmed?

A:

1.1.6.3. Time Sheet Processing

Questions:

Q: 1) In which systems do you track employee master data? Are wage rates only maintained in the R/3 System or in other systems too?

A:

Q: 2) Do you use this data as a basis for indirect activity allocation to cost objects, cost centers, internal orders and so on?

A: Yes
 No

Q: 3) Explain how such a time sheet is structured today and how it should be structured in future (what information do you need on the time sheet?).

A:

Q: 4) Does everyone who records working time have a personal number in HR? (If not, CATS is not supported.)

A: Yes
 No

Q: 5) Which of your employees should fill out timesheets?

A:

Q: 6) How do your employees enter and track working times?

A:

Q: 7) Are the labor costs calculated based on actual costs or standard rates?

A:

Q: 8) How do you determine these labor rates?

A:

Q: 9) Please explain the procedure, how employees in your company track and report time today.

A:

Q: 10) In which system do you want to run payroll?

A:

Q: 11) Are there special conditions for labor costs when employees work in different countries or for different profit centers (for example, if an employee from the UK works on a project in Germany)?

A:

Q: 12) Do you enter labor in complete hours or clock time?

A:

Q: 13) How do your employees enter trip costs? Are the trips linked to the recording of working time? Describe in detail.

A:

Q: 14) Do you use the SAP employee reporting system?

A:

Q: 15) Identify the different categories of activity (activity types) that you use for estimation, planning and settlement purposes?

A:

Q: 16) What are the various cost collectors, to which employees will charge time (for example, cost centers, projects, internal orders)?

A:

Q: 17) Do sub-contractors and other third party labor sources have to enter work using timesheets?

A:

Q: 18) Are these external services settled to a cost center or directly to the project?

A:

Q: 19) Do you record overtime?

A:

Q: 20) How is the cost of overtime calculated? Do you have different types of overtime (for example, time and a half, double time)?

A:

Q: 21) Do you track indirect labor hours, such as vacation, sickness, holiday...? If yes, define the categories you require and their entry type.

A:

Q: 22) Which financial entries do you currently make for your labor distribution?

A:

Q: 23) How do employees record their working time (time, detail, medium/system)?

A:

1.1.6.4. Time Sheet Permit

Questions:

Q: 1) What is your current timesheet approval strategy for employees and external services?

A:

Q: 2) Explain the permit procedure for working time or recording of activity allocation for your employees.

A:

Q: 3) Do you have an external reporting system for working times?

A:

Q: 4) How many employees does the person responsible for approval manage?

A:

1.1.6.5. Forwarding of Time Sheet Data to PM

Questions:

Q: 1) Do you want to transfer recorded activity allocations to Controlling using the time sheet?

A: []Yes

[]No

Q: 2) How often does this transfer take place (daily, weekly and so on)?

A:

Q: 3) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

1.1.6.6. Time Sheet Report

Questions:

Q: 1) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

Q: 2) Do you need to see days that have not timesheet entries?

A:

Q: 3) Do you need an evaluation, do see the days on which personnel enter more than a defined number of hours?

A:

Q: 4) Do you have to see the employee name in the documents for the receiving component?

A:

Q: 5) Do different roles need to see different timesheet information? (If yes, create report variants.)

A:

1.1.6.7. Service Entry Sheet

Questions:

Q: 1) Do you wish to process or document completion of the services performed by the service provider?

A:

1.1.6.8. Entry of Technical Findings

Questions:

Q: 1) Do you record technical information (for example, which part of the equipment was broken, damage, cause of damage) about a maintenance problem in order to create a service history or to enable further evaluations?

A: []Yes
[]No

Q: 2) Which technical data should be recorded and who is responsible?

A:

Q: 3) When do you document technical findings?

A:

Q: 4) Do you want to have a coding system, which allows standardized entry of technical information? If yes, list the different categories (for example, damage), for which you want to have codes.

A:

1.1.6.9. Measurement Document Processing

Questions:

Q: 1) Do you measure and record the current condition of your equipment in the system (for example, temperature, pressure, operating time)? Describe the different measuring points and counters that you require for the different pieces of equipment.

A:

Q: 2) How do you proceed if a measurement reading lies outside of a pre-defined measurement range?

A:

1.1.6.10. Measurement Document Archiving

Questions:

Q: 1) Do you want to archive measurement documents? If so, provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

1.1.7. Settlement and Completion

1.1.7.1. Technical Order Completion

Questions:

Q: 1) Who decides whether the work is technically completed and when?

A:

1.1.7.2. Order Settlement

Questions:

Q: 1) Who settles orders in your company and when?

A:

Q: 2) How do you want to settle maintenance orders in general?

A:

Q: 3) How often and according to which rules do you want to settle orders ?

A:

Q: 4) Do you intend to set up a profit center analysis within your company?

A: []Yes
[]No

Q: 5) Do you want to examine your cost elements for the settlement of orders in greater detail?

A:

1.1.7.3. Business Order Completion

Questions:

Q: 1) Who decides whether the work is fully completed (business completion) and when?

A:

Q: 2) Which criteria do you use to decide whether work is fully completed?

A:

1.1.7.4. Order Archiving

Questions:

Q: 1) Do you want to archive orders? If so, please provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

Q: 2) How long do you want to retain orders in the system before they are archived?

A:

Q: 3) Do you want to archive orders?

A:

1.1.7.5. Historical Order - Entry

Questions:

Q: 1) Do you create historical orders to keep track of maintenance work that has already been completed?

A: Yes
 No

1.1.8. Information System

1.1.8.1. Evaluations of Plant Maintenance Information System [PMIS]

Questions:

Q: 1) Which analysis system is defined in your company?

A:

Q: 2) Please describe in detail the different analyses/reports that you will use.

A:

1.2. Planned Maintenance Processing

1.2.1. Maintenance Planning

Questions:

Q: 1) Note: For information about the maintenance plan, see documentation on master data.

A:

1.2.1.1. Maintenance Plan Scheduling

Questions:

Q: 1) Do you schedule your maintenance plans manually, or should the system perform the scheduling automatically?

A:

1.2.1.2. Maintenance Call Processing

Questions:

Q: 1) Which objects should be generated for maintenance calls?

A:

Q: 2) Should scheduled orders be released automatically when they are created?

A: Yes

No

1.2.2. Notification

1.2.2.1. Notification Creation/Processing

Questions:

Q: 1) Who in your organization is responsible for identifying maintenance work?

A:

Q: 2) Who in your organization is responsible for processing identified work?

A:

Q: 3) How do you prioritize identified work?

A:

Q: 4) Are you restricted to a certain period of time when executing these tasks?

A:

Q: 5) List the business partners (internal and/or external) whose address information you require when creating the notification. Add other business partners, if necessary.

A:

Q: 6) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 7) Do you want information about the reference object displayed automatically when a notification is created? If yes, what information?

A:

Q: 8) How do you describe a problem? Do you enter a verbal problem description or do you use standardized codes, for example, to determine the damage, cause of damage, or object part?

A:

Q: 9) Do you want to link digitalized documents to notifications?

A: Yes
 No

Q: 10) Do you assign a responsible person to each task?

A:

Q: 11) Should the person responsible for a task be informed automatically by the system?

A:

Q: 12) How do you want to configure the interface for your notification with regard to control data, breakdown data, activity data, and task data?

A:

Q: 13) Do you have standard tasks that you always perform for different types of notifications? If yes, please describe them in detail.

A:

Q: 14) Do you record the performed activities that solved the customer problem in a standardized way (for example, using standardized codes) in order to evaluate possible solutions for a problem?

A:

Q: 15) Do you want to set up an escalation workflow for notifications and tasks?

A:

Q: 16) Do you want to use paging in your company as an additional form of communication?

A:

Q: 17) How and when are notifications completed?

A:

1.2.2.2. Notification Printing

Questions:

Q: 1) Do you print notifications?

A: Yes
 No

Q: 2) Provide some examples of the output format(s) for notifications.

1.2.3. Order

1.2.3.1. Order Creation/Processing

Questions:

Q: 1) What different types of maintenance do you have in your company (for example, preventive maintenance, repair, installation)? Create a list of the maintenance types and outline the differences in planning and execution.

A:

Q: 2) Mark in the following list whether maintenance tasks are performed by employees and/or contractors.

A:

Q: 3) What information about labor resources (for example, availability and number of people, duration of work, split of operation) do you require from the system when planning maintenance orders?

A:

Q: 4) How do you proceed with an external assignment with the sub-contractor? Choose one or more of the following options.

A:

Q: 5) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 6) Will several technicians work on the same maintenance task?

A: Yes
 No

Q: 7) Do you want to assign individual operations to particular people?

A:

Q: 8) Do you want to configure a special search help for partners in your order?

A:

Q: 9) For which operation types do you want to represent the operation description using service specifications?

A:

Q: 10) Do you want to define skills and/or qualifications for maintenance order operations?

A: Yes
 No

Q: 11) Do you provide the technicians who perform the preventive maintenance with a list of activities? If yes, how detailed are they?

A:

Q: 12) Do you use pre-defined task lists in work order planning?

A: Yes
 No

Q: 13) If yes, which of the following types of task lists do you require?

A:

Q: 14) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 15) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 16) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 17) Do you want to generate purchase requisitions and reservations when the order is created?

A:

Q: 18) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 19) Do you want to generate collective purchase requisitions or individual purchase requisitions for each external item?

A:

Q: 20) How do you want to plan special tools, documents and so on, which are required to execute maintenance activities?

A:

Q: 21) Do you use work order permits, for example, to manage working conditions or safety matters?

A: Yes
 No

Q: 22) At what intervals do you want to schedule work (for example, daily, weekly, monthly)?

A:

Q: 23) How do you want to prioritize work?

A:

Q: 24) At which level do you plan work (for example, for a shift, crew, skill, qualification, or an individual person and so on)?

A:

Q: 25) How detailed is your planning (for example, usage backlog, capacity evaluation, capacity scheduling)?

A:

Q: 26) Should the capacity load, which was formed for all the capacity types of the PP work centers, be reduced for the duration of a maintenance task planned in a work order?

A:

Q: 27) Do you want to use paging in your company as an additional form of communication?

A:

Q: 28) Do you use maintenance orders for processing investment measures? If yes, should the asset under construction be created automatically or manually?

A:

Q: 29) Do you want the maintenance order to be integrated with one of the following Controlling components?

A:

1.2.3.2. Material Planning

Questions:

Q: 1) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 2) Who performs material planning for orders in your company?

A:

Q: 3) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 4) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 5) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 6) Is there an approval procedure for external purchase orders and material withdrawals? If yes, describe it.

A:

1.2.3.3. Order Permit

Questions:

Q: 1) Do you consider permits in connection with orders, for example, with regard to working conditions or safety aspects? If yes, describe your permit procedures.

A:

Q: 2) If yes, who in your company is authorized to issue permits?

A:

1.2.3.4. Order Release

Questions:

Q: 1) Who in your organization is allowed to release maintenance orders (for example, maintenance planner, dispatcher)?

A:

Q: 2) Do you need to restrict the release until a process is completed or authorization obtained? If yes, describe the process.

A:

Q: 3) Are there instances where orders should be released automatically?

A:

1.2.3.5. Work Clearance Management

Questions:

Q: 1) What should be the relationship between the objects in Work Clearance Management (order, work approval, work clearance application, work clearance document and so on)?

A:

Q: 2) Do conflicts exist between the conditions of different technical objects? Define these.

A:

Q: 3) Which different approval steps are required for your work clearance process? Describe the concept or process flow of your approval process.

A:

Q: 4) Which employee is responsible for which types of approvals? Describe the applications.

A:

Q: 5) Which employee should be informed about which subject or object condition at which time?

A:

Q: 6) Should the employees involved later in the approval process be informed automatically of the progress of previous approval levels (Workflow)?

A:

1.2.3.6. Order Printing

Questions:

Q: 1) Identify the internal papers that you require for the different people and order types involved (for example, job ticket for employee, picking list).

A:

Q: 2) Provide some representative layout examples.

Q: 3) Do you assign printers to the people involved?

A:

1.2.3.7. Order Execution

Questions:

Q: 1) Note: This process is only for maintenance activities performed manually on technical systems by the technician.

A:

Q: 2) How is material withdrawn for the order?

A:

Q: 3) Do you work with closed or open warehouses?

A:

Q: 4) Should the warehouse be informed of imminent material withdrawals using a material availability slip?

A:

1.2.4. Capacity Planning

1.2.4.1. Capacity Evaluation

Questions:

Q: 1) Is it necessary to determine if a person is available to do a task? (If yes, consider using employee shift scheduling.)

A:

Q: 2) Do you want to change capacity/work centers for periods with overload? (If yes, consider changing the work center/assignment/activity dates manually from the evaluation reports.)

A:

Q: 3) Do you do short term capacity planning? (If yes, ensure the time horizon for the capacity evaluation reflects the appropriate time period. If no, ensure the time horizon for the capacity evaluation reflects the appropriate time period.)

A:

Q: 4) Do you utilize your personnel resources/capacities per process or enterprise-wide? (If yes, consider using work center hierarchies.)

A:

Q: 5) Are resources to be shared across departments (for example plant maintenance and projects)?

A:

Q: 6) Which order type do you want to use for capacity evaluation?

A:

1.2.4.2. Capacity Dispatching and Leveling

Questions:

Q: 1) Do you process the overload on capacities/wk centers? (If yes, you could use the capacity leveling functions- dispatching and deallocating).

A:

Q: 2) Do you prefer to use a graphical planning tool for capacity leveling? (If yes, use the graphical capacity planning tool If no, consider using the tabular capacity planning tool.)

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Q: 3) Do you want to assign available capacities to order operations?

A: Yes
 No

Q: 4) When you split order operations, do you want the system to create capacity loads automatically for individual people?

A:

Q: 5) Which type of planning table do you want to use?

A:

Q: 6) Which planning strategies will you use for Sequencing?

A:

1.2.5. Modification of Technical Systems

1.2.5.1. Installation, Dismantling and Modification of Equipment

Questions:

Q: 1) Are installation operations in your company performed by your own technicians or assigned externally?

A:

Q: 2) How are dismantling procedures performed at your company?

A:

Q: 3) Which components are exchanged?

A:

Q: 4) Are dismantled parts refurbished? If yes, describe the refurbishment process.

A:

Q: 5) Should a history be managed for the exchanged parts?

A:

Q: 6) Who documents the modification of a technical system and when?

A:

Q: 7) Do changes also have to be made to the system master during modification work?

A:

1.2.6. Material Movements

1.2.6.1. Goods Issue Processing

Questions:

Q: 1) Who posts the goods issue?

A:

Q: 2) How do you record materials issued from stores?

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Q: 3) How do you document materials supplied by the subcontractors?

A:

Q: 4) How will the consumption of these parts be recorded and who will post their withdrawal in the system?

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Q: 5) How do you document materials that are ordered for specific work orders?

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Q: 6) How do you wish to document which materials were received specifically for a work order?

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Q: 7) How much time elapses between the actual goods issue and its posting in the system?

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Q: 8) Is the posting made online or in batch mode?

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Q: 9) Are deliveries posted individually or for each group of goods issues?

A:

Q: 10) Is stock posted to the receiving site? If so, which type of stock (stock in transit, available stock, etc.)?

A:

Q: 11) Which documents are generated in conjunction with this posting and what information do they contain?

A:

1.2.7. Completion Confirmation

Questions:

Q: 1) Do you or your employees enter completion confirmations of time?

A:

Q: 2) Who confirms orders in your company?

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Q: 3) Are the completion confirmations in your company entered at the level of personnel number?

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Q: 4) Should the superior approve the times recorded by the employees?

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Q: 5) Do you also want to confirm used material at the same time as the time confirmation?

A:

Q: 6) Should the technical completion (for example, for breakdown times, causes of damage, tasks and so on) be made at the same time as the time confirmation?

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Q: 7) Do you also want to enter measurement readings with the completion confirmation?

A:

Q: 8) Do you use the integration with the HR module?

A: Yes
 No

Q: 9) Do you create completion confirmations centrally, or does each employee enter their own times themselves?

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Q: 10) Do you issue confirmation slips to your employees?

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Q: 11) How many times per day do your employees enter their working time?

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Q: 12) Will you use a Plant Data Collection (PDC) system for your completion confirmations?

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Q: 13) Do you enter the working times of contractors? If yes, how should the external services be entered?

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1.2.7.1. Individual Time Confirmation

Questions:

Q: 1) Do you enter the absolute duration or period of time (from...to)?

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Q: 2) Do you differentiate the times entered according to other activity types (for example, to distinguish between normal work hours and overtime)?

A:

Q: 3) Is the confirmation of your services person-based?

A:

Q: 4) In what unit and with what accuracy do you want to enter services?

A:

1.2.7.2. Overall Completion Confirmation

Questions:

Q: 1) Which employees confirm which data?

A:

Q: 2) Are internal services confirmed?

A:

1.2.7.3. Time Sheet Processing

Questions:

Q: 1) In which systems do you track employee master data? Are wage rates only maintained in the R/3 System or in other systems too?

A:

Q: 2) Do you use this data as a basis for indirect activity allocation to cost objects, cost centers, internal orders and so on?

A: Yes
 No

Q: 3) Explain how such a time sheet is structured today and how it should be structured in future (what information do you need on the time sheet?).

A:

Q: 4) Does everyone who records working time have a personal number in HR? (If not, CATS is not supported.)

A: Yes
 No

Q: 5) Which of your employees should fill out timesheets?

A:

Q: 6) How do your employees enter and track working times?

A:

Q: 7) Are the labor costs calculated based on actual costs or standard rates?

A:

Q: 8) How do you determine these labor rates?

A:

Q: 9) Please explain the procedure, how employees in your company track and report time today.

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Q: 10) In which system do you want to run payroll?

A:

Q: 11) Are there special conditions for labor costs when employees work in different countries or for different profit centers (for example, if an employee from the UK works on a project in Germany)?

A:

Q: 12) Do you enter labor in complete hours or clock time?

A:

Q: 13) How do your employees enter trip costs? Are the trips linked to the recording of working time? Describe in detail.

A:

Q: 14) Do you use the SAP employee reporting system?

A:

Q: 15) Identify the different categories of activity (activity types) that you use for estimation, planning and settlement purposes?

A:

Q: 16) What are the various cost collectors, to which employees will charge time (for example, cost centers, projects, internal orders)?

A:

Q: 17) Do sub-contractors and other third party labor sources have to enter work using timesheets?

A:

Q: 18) Are these external services settled to a cost center or directly to the project?

A:

Q: 19) Do you record overtime?

A:

Q: 20) How is the cost of overtime calculated? Do you have different types of overtime (for example, time and a half, double time)?

A:

Q: 21) Do you track indirect labor hours, such as vacation, sickness, holiday...? If yes, define the categories you require and their entry type.

A:

Q: 22) Which financial entries do you currently make for your labor distribution?

A:

Q: 23) How do employees record their working time (time, detail, medium/system)?

A:

1.2.7.4. Time Sheet Permit

Questions:

Q: 1) What is your current timesheet approval strategy for employees and external services?

A:

Q: 2) Explain the permit procedure for working time or recording of activity allocation for your employees.

A:

Q: 3) Do you have an external reporting system for working times?

A:

Q: 4) How many employees does the person responsible for approval manage?

A:

1.2.7.5. Forwarding of Time Sheet Data to PM

Questions:

Q: 1) Do you want to transfer recorded activity allocations to Controlling using the time sheet?

A: Yes
 No

Q: 2) How often does this transfer take place (daily, weekly and so on)?

A:

Q: 3) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

1.2.7.6. Time Sheet Report

Questions:

Q: 1) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

Q: 2) Do you need to see days that have not timesheet entries?

A:

Q: 3) Do you need an evaluation, do see the days on which personnel enter more than a defined number of hours?

A:

Q: 4) Do you have to see the employee name in the documents for the receiving component?

A:

Q: 5) Do different roles need to see different timesheet information? (If yes, create report variants.)

A:

1.2.7.7. Service Entry Sheet

Questions:

Q: 1) Do you wish to process or document completion of the services performed by the service provider?

A:

1.2.7.8. Measurement Document Processing

Questions:

Q: 1) Do you measure and record the current condition of your equipment in the system (for example, temperature, pressure, operating time)? Describe the different measuring points and counters that you require for the different pieces of equipment.

A:

Q: 2) How do you proceed if a measurement reading lies outside of a pre-defined measurement range?

A:

1.2.7.9. Measurement Document Archiving

Questions:

Q: 1) Do you want to archive measurement documents? If so, provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

1.2.8. Settlement and Completion

1.2.8.1. Technical Order Completion

Questions:

Q: 1) Who decides whether the work is technically completed and when?

A:

1.2.8.2. Order Settlement

Questions:

Q: 1) Who settles orders in your company and when?

A:

Q: 2) How do you want to settle maintenance orders in general?

A:

Q: 3) How often and according to which rules do you want to settle orders ?

A:

Q: 4) Do you intend to set up a profit center analysis within your company?

A: Yes
 No

Q: 5) Do you want to examine your cost elements for the settlement of orders in greater detail?

A:

1.2.8.3. Business Order Completion

Questions:

Q: 1) Who decides whether the work is fully completed (business completion) and when?

A:

Q: 2) Which criteria do you use to decide whether work is fully completed?

A:

1.2.8.4. Order Archiving

Questions:

Q: 1) Do you want to archive orders? If so, please provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

Q: 2) How long do you want to retain orders in the system before they are archived?

A:

Q: 3) Do you want to archive orders?

A:

1.2.8.5. Historical Order - Entry

Questions:

Q: 1) Do you create historical orders to keep track of maintenance work that has already been completed?

A: []Yes
[]No

1.2.9. Information System

1.2.9.1. Evaluations of Plant Maintenance Information System [PMIS]

Questions:

Q: 1) Which analysis system is defined in your company?

A:

Q: 2) Please describe in detail the different analyses/reports that you will use.

A:

1.3. Project-Based Maintenance Processing

Questions:

Q: 1) Do you have shutdowns in plants or plant areas, for which you require an exact process flow for planning, execution, budget controlling, investment capitalization and so on?

A:

Q: 2) Which tool do you currently use for project management?

A:

1.3.1. Notification

1.3.1.1. Notification Creation/Processing

Questions:

Q: 1) Who in your organization is responsible for identifying maintenance work?

A:

Q: 2) Who in your organization is responsible for processing identified work?

A:

Q: 3) How do you prioritize identified work?

A:

Q: 4) Are you restricted to a certain period of time when executing these tasks?

A:

Q: 5) List the business partners (internal and/or external) whose address information you require when creating the notification. Add other business partners, if necessary.

A:

Q: 6) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 7) Do you want information about the reference object displayed automatically when a notification is created? If yes, what information?

A:

Q: 8) How do you describe a problem? Do you enter a verbal problem description or do you use standardized codes, for example, to determine the damage, cause of damage, or object part?

A:

Q: 9) Do you want to link digitalized documents to notifications?

A: Yes
 No

Q: 10) Do you assign a responsible person to each task?

A:

Q: 11) Should the person responsible for a task be informed automatically by the system?

A:

Q: 12) How do you want to configure the interface for your notification with regard to control data, breakdown data, activity data, and task data?

A:

Q: 13) Do you have standard tasks that you always perform for different types of notifications? If yes, please describe them in detail.

A:

Q: 14) Do you record the performed activities that solved the customer problem in a standardized way (for example, using standardized codes) in order to evaluate possible solutions for a problem?

A:

Q: 15) Do you want to set up an escalation workflow for notifications and tasks?

A:

Q: 16) Do you want to use paging in your company as an additional form of communication?

A:

Q: 17) How and when are notifications completed?

A:

1.3.1.2. Notification Printing

Questions:

Q: 1) Do you print notifications?

A: Yes
 No

Q: 2) Provide some examples of the output format(s) for notifications.

1.3.2. Order

1.3.2.1. Order Creation/Processing

Questions:

Q: 1) What different types of maintenance do you have in your company (for example, preventive maintenance, repair, installation)? Create a list of the maintenance types and outline the differences in planning and execution.

A:

Q: 2) Mark in the following list whether maintenance tasks are performed by employees and/or contractors.

A:

Q: 3) What information about labor resources (for example, availability and number of people, duration of work, split of operation) do you require from the system when planning maintenance orders?

A:

Q: 4) How do you proceed with an external assignment with the sub-contractor? Choose one or more of the following options.

A:

Q: 5) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 6) Will several technicians work on the same maintenance task?

A: Yes
 No

Q: 7) Do you want to assign individual operations to particular people?

A:

Q: 8) Do you want to configure a special search help for partners in your order?

A:

Q: 9) For which operation types do you want to represent the operation description using service specifications?

A:

Q: 10) Do you want to define skills and/or qualifications for maintenance order operations?

A: Yes
 No

Q: 11) Do you provide the technicians who perform the preventive maintenance with a list of activities? If yes, how detailed are they?

A:

Q: 12) Do you use pre-defined task lists in work order planning?

A: Yes
 No

Q: 13) If yes, which of the following types of task lists do you require?

A:

Q: 14) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 15) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 16) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 17) Do you want to generate purchase requisitions and reservations when the order is created?

A:

Q: 18) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 19) Do you want to generate collective purchase requisitions or individual purchase requisitions for each external item?

A:

Q: 20) How do you want to plan special tools, documents and so on, which are required to execute maintenance activities?

A:

Q: 21) Do you use work order permits, for example, to manage working conditions or safety matters?

A: Yes
 No

Q: 22) At what intervals do you want to schedule work (for example, daily, weekly, monthly)?

A:

Q: 23) How do you want to prioritize work?

A:

Q: 24) At which level do you plan work (for example, for a shift, crew, skill, qualification, or an individual person and so on)?

A:

Q: 25) How detailed is your planning (for example, usage backlog, capacity evaluation, capacity scheduling)?

A:

Q: 26) Should the capacity load, which was formed for all the capacity types of the PP work centers, be reduced for the duration of a maintenance task planned in a work order?

A:

Q: 27) Do you want to use paging in your company as an additional form of communication?

A:

Q: 28) Do you use maintenance orders for processing investment measures? If yes, should the asset under construction be created automatically or manually?

A:

Q: 29) Do you want the maintenance order to be integrated with one of the following Controlling components?

A:

1.3.2.2. Material Planning

Questions:

Q: 1) Do you assign materials (spare parts) to work orders during the planning phase?

A: []Yes
[]No

Q: 2) Who performs material planning for orders in your company?

A:

Q: 3) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 4) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 5) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 6) Is there an approval procedure for external purchase orders and material withdrawals? If yes, describe it.

A:

1.3.2.3. Order Permit

Questions:

Q: 1) Do you consider permits in connection with orders, for example, with regard to working conditions or safety aspects? If yes, describe your permit procedures.

A:

Q: 2) If yes, who in your company is authorized to issue permits?

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1.3.2.4. Order Release

Questions:

Q: 1) Who in your organization is allowed to release maintenance orders (for example, maintenance planner, dispatcher)?

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Q: 2) Do you need to restrict the release until a process is completed or authorization obtained? If yes, describe the process.

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Q: 3) Are there instances where orders should be released automatically?

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1.3.2.5. Work Clearance Management

Questions:

Q: 1) What should be the relationship between the objects in Work Clearance Management (order, work approval, work clearance application, work clearance document and so on)?

A:

Q: 2) Do conflicts exist between the conditions of different technical objects? Define these.

A:

Q: 3) Which different approval steps are required for your work clearance process? Describe the concept or process flow of your approval process.

A:

Q: 4) Which employee is responsible for which types of approvals? Describe the applications.

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Q: 5) Which employee should be informed about which subject or object condition at which time?

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1.3.2.6. Order Printing

Questions:

Q: 1) Identify the internal papers that you require for the different people and order types involved (for example, job ticket for employee, picking list).

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Q: 2) Provide some representative layout examples.

Q: 3) Do you assign printers to the people involved?

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Questions:

Q: 1) Note: This process is only for maintenance activities performed manually on technical systems by the technician.

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Q: 2) How is material withdrawn for the order?

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Q: 3) Do you work with closed or open warehouses?

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Q: 1) Is it necessary to determine if a person is available to do a task? (If yes, consider using employee shift scheduling.)

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Q: 2) Do you want to change capacity/work centers for periods with overload? (If yes, consider changing the work center/assignment/activity dates manually from the evaluation reports.)

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Q: 4) Do you utilize your personnel resources/capacities per process or enterprise-wide? (If yes, consider using work center hierarchies.)

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Q: 6) Which order type do you want to use for capacity evaluation?

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Q: 1) Do you process the overload on capacities/wk centers? (If yes, you could use the capacity leveling functions- dispatching and deallocating).

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Q: 2) Do you prefer to use a graphical planning tool for capacity leveling? (If yes, use the graphical capacity planning tool. If no, consider using the tabular capacity planning tool.)

A:

Q: 3) Do you want to assign available capacities to order operations?

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 No

Q: 4) When you split order operations, do you want the system to create capacity loads automatically for individual people?

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Q: 5) Which type of planning table do you want to use?

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Q: 1) Are installation operations in your company performed by your own technicians or assigned externally?

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Q: 8) Do you use the integration with the HR module?

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[]No

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A:

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A: Yes
 No

Q: 5) Which of your employees should fill out timesheets?

A:

Q: 6) How do your employees enter and track working times?

A:

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Q: 8) How do you determine these labor rates?

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Q: 10) In which system do you want to run payroll?

A:

Q: 11) Are there special conditions for labor costs when employees work in different countries or for different profit centers (for example, if an employee from the UK works on a project in Germany)?

A:

Q: 12) Do you enter labor in complete hours or clock time?

A:

Q: 13) How do your employees enter trip costs? Are the trips linked to the recording of working time? Describe in detail.

A:

Q: 14) Do you use the SAP employee reporting system?

A:

Q: 15) Identify the different categories of activity (activity types) that you use for estimation, planning and settlement purposes?

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Q: 16) What are the various cost collectors, to which employees will charge time (for example, cost centers, projects, internal orders)?

A:

Q: 17) Do sub-contractors and other third party labor sources have to enter work using timesheets?

A:

Q: 18) Are these external services settled to a cost center or directly to the project?

A:

Q: 19) Do you record overtime?

A:

Q: 20) How is the cost of overtime calculated? Do you have different types of overtime (for example, time and a half, double time)?

A:

Q: 21) Do you track indirect labor hours, such as vacation, sickness, holiday...? If yes, define the categories you require and their entry type.

A:

Q: 22) Which financial entries do you currently make for your labor distribution?

A:

Q: 23) How do employees record their working time (time, detail, medium/system)?

A:

1.3.6.4. Time Sheet Permit

Questions:

Q: 1) What is your current timesheet approval strategy for employees and external services?

A:

Q: 2) Explain the permit procedure for working time or recording of activity allocation for your employees.

A:

Q: 3) Do you have an external reporting system for working times?

A:

Q: 4) How many employees does the person responsible for approval manage?

A:

1.3.6.5. Forwarding of Time Sheet Data to PM

Questions:

Q: 1) Do you want to transfer recorded activity allocations to Controlling using the time sheet?

A: []Yes
[]No

Q: 2) How often does this transfer take place (daily, weekly and so on)?

A:

Q: 3) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

1.3.6.6. Time Sheet Report

Questions:

Q: 1) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

Q: 2) Do you need to see days that have not timesheet entries?

A:

Q: 3) Do you need an evaluation, do see the days on which personnel enter more than a defined number of hours?

A:

Q: 4) Do you have to see the employee name in the documents for the receiving component?

A:

Q: 5) Do different roles need to see different timesheet information? (If yes, create report variants.)

A:

1.3.6.7. Service Entry Sheet

Questions:

Q: 1) Do you wish to process or document completion of the services performed by the service provider?

A:

1.3.6.8. Measurement Document Processing

Questions:

Q: 1) Do you measure and record the current condition of your equipment in the system (for example, temperature, pressure, operating time)? Describe the different measuring points and counters that you require for the different pieces of equipment.

A:

Q: 2) How do you proceed if a measurement reading lies outside of a pre-defined measurement range?

A:

1.3.6.9. Measurement Document Archiving

Questions:

Q: 1) Do you want to archive measurement documents? If so, provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

1.3.7. Settlement and Completion

1.3.7.1. Technical Order Completion

Questions:

Q: 1) Who decides whether the work is technically completed and when?

A:

1.3.7.2. Order Settlement

Questions:

Q: 1) Who settles orders in your company and when?

A:

Q: 2) How do you want to settle maintenance orders in general?

A:

Q: 3) How often and according to which rules do you want to settle orders ?

A:

Q: 4) Do you intend to set up a profit center analysis within your company?

A: Yes
 No

Q: 5) Do you want to examine your cost elements for the settlement of orders in greater detail?

A:

1.3.7.3. Business Order Completion

Questions:

Q: 1) Who decides whether the work is fully completed (business completion) and when?

A:

Q: 2) Which criteria do you use to decide whether work is fully completed?

A:

1.3.7.4. Order Archiving

Questions:

Q: 1) Do you want to archive orders? If so, please provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

Q: 2) How long do you want to retain orders in the system before they are archived?

A:

Q: 3) Do you want to archive orders?

A:

1.3.7.5. Historical Order - Entry

Questions:

Q: 1) Do you create historical orders to keep track of maintenance work that has already been completed?

A: Yes
 No

1.3.8. Information System

1.3.8.1. Evaluations of Plant Maintenance Information System [PMIS]

Questions:

Q: 1) Which analysis system is defined in your company?

A:

Q: 2) Please describe in detail the different analyses/reports that you will use.

A:

1.4. Refurbishment Processing in Plant Maintenance

1.4.1. Order

1.4.1.1. Refurbishment Order Creation/Processing

Questions:

Q: 1) What different types of maintenance do you have in your company (for example, preventive maintenance, repair, installation)? Create a list of the maintenance types and outline the differences in planning and execution.

A:

Q: 2) Do you use maintenance orders for the refurbishment of materials?

A: Yes
 No

Q: 3) If yes, describe the refurbishment process and the valuation of refurbishment material in detail.

A:

Q: 4) Mark in the following list whether maintenance tasks are performed by employees and/or contractors.

A:

Q: 5) What information about labor resources (for example, availability and number of people, duration of work, split of operation) do you require from the system when planning maintenance orders?

A:

Q: 6) How do you proceed with an external assignment with the sub-contractor? Choose one or more of the following options.

A:

Q: 7) Do you want to be able to process related notification and order data collectively in a single form?

A:

Q: 8) Will several technicians work on the same maintenance task?

A: Yes
 No

Q: 9) Do you want to assign individual operations to particular people?

A:

Q: 10) Do you want to configure a special search help for partners in your order?

A:

Q: 11) For which operation types do you want to represent the operation description using service specifications?

A:

Q: 12) Do you want to define skills and/or qualifications for maintenance order operations?

A: Yes
 No

Q: 13) Do you provide the technicians who perform the preventive maintenance with a list of activities? If yes, how detailed are they?

A:

Q: 14) Do you use pre-defined task lists in work order planning?

A: Yes
 No

Q: 15) If yes, which of the following types of task lists do you require?

A:

Q: 16) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 17) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 18) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 19) Do you want to generate purchase requisitions and reservations when the order is created?

A:

Q: 20) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 21) Do you want to generate collective purchase requisitions or individual purchase requisitions for each external item?

A:

Q: 22) How do you want to plan special tools, documents and so on, which are required to execute maintenance activities?

A:

Q: 23) Do you use work order permits, for example, to manage working conditions or safety matters?

A: Yes
 No

Q: 24) At what intervals do you want to schedule work (for example, daily, weekly, monthly)?

A:

Q: 25) How do you want to prioritize work?

A:

Q: 26) At which level do you plan work (for example, for a shift, crew, skill, qualification, or an individual person and so on)?

A:

Q: 27) How detailed is your planning (for example, usage backlog, capacity evaluation, capacity scheduling)?

A:

Q: 28) Should the capacity load, which was formed for all the capacity types of the PP work centers, be reduced for the duration of a maintenance task planned in a work order?

A:

Q: 29) Do you want to use paging in your company as an additional form of communication?

A:

1.4.1.2. Material Planning

Questions:

Q: 1) Do you assign materials (spare parts) to work orders during the planning phase?

A: Yes
 No

Q: 2) Who performs material planning for orders in your company?

A:

Q: 3) Which rules do you use to determine material availability (for example, daily requirements, individual requirements)?

A:

Q: 4) How do you want to plan materials that must be purchased during the planning phase?

A:

Q: 5) Do you want to create purchase requisitions directly from the maintenance order during the planning phase?

A: Yes
 No

Q: 6) Is there an approval procedure for external purchase orders and material withdrawals? If yes, describe it.

A:

1.4.1.3. Order Permit

Questions:

Q: 1) Do you consider permits in connection with orders, for example, with regard to working conditions or safety aspects? If yes, describe your permit procedures.

A:

Q: 2) If yes, who in your company is authorized to issue permits?

A:

1.4.1.4. Order Release

Questions:

Q: 1) Who in your organization is allowed to release maintenance orders (for example, maintenance planner, dispatcher)?

A:

Q: 2) Do you need to restrict the release until a process is completed or authorization obtained? If yes, describe the process.

A:

Q: 3) Are there instances where orders should be released automatically?

A:

1.4.1.5. Order Printing

Questions:

Q: 1) Identify the internal papers that you require for the different people and order types involved (for example, job ticket for employee, picking list).

A:

Q: 2) Provide some representative layout examples.

Q: 3) Do you assign printers to the people involved?

A:

1.4.1.6. Order Execution

Questions:

Q: 1) Note: This process is only for maintenance activities performed manually on technical systems by the technician.

A:

Q: 2) How is material withdrawn for the order?

A:

Q: 3) Do you work with closed or open warehouses?

A:

Q: 4) Should the warehouse be informed of imminent material withdrawals using a material availability slip?

A:

1.4.2. Capacity Planning

1.4.2.1. Capacity Evaluation

Questions:

Q: 1) Is it necessary to determine if a person is available to do a task? (If yes, consider using employee shift scheduling.)

A:

Q: 2) Do you want to change capacity/work centers for periods with overload? (If yes, consider changing the work center/assignment/activity dates manually from the evaluation reports.)

A:

Q: 3) Do you do short term capacity planning? (If yes, ensure the time horizon for the capacity evaluation reflects the appropriate time period. If no, ensure the time horizon for the capacity evaluation reflects the appropriate time period.)

A:

Q: 4) Do you utilize your personnel resources/capacities per process or enterprise-wide? (If yes, consider using work center hierarchies.)

A:

Q: 5) Are resources to be shared across departments (for example plant maintenance and projects)?

A:

Q: 6) Which order type do you want to use for capacity evaluation?

A:

1.4.2.2. Capacity Dispatching and Leveling

Questions:

Q: 1) Do you process the overload on capacities/wk centers? (If yes, you could use the capacity leveling functions- dispatching and deallocating).

A:

Q: 2) Do you prefer to use a graphical planning tool for capacity leveling? (If yes, use the graphical capacity planning tool. If no, consider using the tabular capacity planning tool.)

A:

Q: 3) Do you want to assign available capacities to order operations?

A: Yes
 No

Q: 4) When you split order operations, do you want the system to create capacity loads automatically for individual people?

A:

Q: 5) Which type of planning table do you want to use?

A:

Q: 6) Which planning strategies will you use for Sequencing?

A:

1.4.3. Goods Movements

1.4.3.1. Goods Issue for Refurbishment

Questions:

Q: 1) What triggers a goods issue?

A:

Q: 2) Who approves the goods issue? (You could use workflow to handle this process.)

A:

Q: 3) Who posts the goods issue?

A:

Q: 4) How much time elapses between the actual goods issue and its posting in the system?

A:

Q: 5) Is the posting made online or in batch mode?

A:

Q: 6) Which documents are generated in conjunction with this posting and what information do they contain?

A:

1.4.3.2. Goods Receipt for Refurbishment

Questions:

Q: 1) To which stock do you post materials at the time of their receipt?

A:

Q: 2) Will you post goods you receive to stock in quality inspection?
the goods wherever they should go as a result of the usage decision?

A: Yes
 No

Q: 3) Which goods receipt inspections (which may be triggered by the system) and which inspection results (e.g. expiration date) are entered in the system?

A:

Q: 4) Against which reference documents do you effect a goods receipt?

A:

Q: 5) Which information do you use as a basis for planning your goods receipts (volume, weight, expected time requirements, etc.)?

A:

Q: 6) For which material types do you wish to record data at the time of goods receipt?

A:

Q: 7) Do you physically store the goods you have received into "stock in quality inspection" at a different location than those posted to normal stock?

A: Yes
 No

Q: 8) Do you allow every material to be stored at all storage locations? Please describe!

A:

Q: 9) Which documents are generated with the goods receipt?

A:

Q: 10) Which documents are generated in connection with a goods receipt?

A:

Q: 11) If you use Warehouse Management, describe the stock put-away process (how the goods are placed into storage).

A:

Q: 12) If a goods receipt quantity is assigned to a goods issue, do you want the person who enters the goods receipt to receive a corresponding message?

A:

Q: 13) Will you inspect the material/article at the time of goods receipt? If so, do you enter the goods receipt and the inspection result or do you only enter the goods receipt after the inspection has been carried out?

A: Yes
 No

Q: 14) If you are using batch management, how is the batch number determined at the time of goods receipt?

A:

Q: 15) Do you classify the batches at the time of goods receipt? Please specify the criteria.

A:

Q: 16) Is the automatic account determination process defined by Financial Accounting? If not, who is responsible within Logistics?

A:

Q: 17) Do you wish to print out the material document as evidence of a goods movement? Which information should be included in the printout?

A:

1.4.4. Completion Confirmation

Questions:

Q: 1) Do you or your employees enter completion confirmations of time?

A:

Q: 2) Who confirms orders in your company?

A:

Q: 3) Are the completion confirmations in your company entered at the level of personnel number?

A:

Q: 4) Should the superior approve the times recorded by the employees?

A:

Q: 5) Do you also want to confirm used material at the same time as the time confirmation?

A:

Q: 6) Should the technical completion (for example, for breakdown times, causes of damage, tasks and so on) be made at the same time as the time confirmation?

A:

Q: 7) Do you also want to enter measurement readings with the completion confirmation?

A:

Q: 8) Do you use the integration with the HR module?

A: Yes
 No

Q: 9) Do you create completion confirmations centrally, or does each employee enter their own times themselves?

A:

Q: 10) Do you issue confirmation slips to your employees?

A:

Q: 11) How many times per day do your employees enter their working time?

A:

Q: 12) Will you use a Plant Data Collection (PDC) system for your completion confirmations?

A:

Q: 13) Do you enter the working times of contractors? If yes, how should the external services be entered?

A:

1.4.4.1. Individual Time Confirmation

Questions:

Q: 1) Do you enter the absolute duration or period of time (from...to)?

A:

Q: 2) Do you differentiate the times entered according to other activity types (for example, to distinguish between normal work hours and overtime)?

A:

Q: 3) Is the confirmation of your services person-based?

A:

Q: 4) In what unit and with what accuracy do you want to enter services?

A:

1.4.4.2. Overall Completion Confirmation

Questions:

Q: 1) Which employees confirm which data?

A:

Q: 2) Are internal services confirmed?

A:

1.4.4.3. Time Sheet Processing

Questions:

Q: 1) In which systems do you track employee master data? Are wage rates only maintained in the R/3 System or in other systems too?

A:

Q: 2) Do you use this data as a basis for indirect activity allocation to cost objects, cost centers, internal orders and so on?

A: Yes
 No

Q: 3) Explain how such a time sheet is structured today and how it should be structured in future (what information do you need on the time sheet?).

A:

Q: 4) Does everyone who records working time have a personal number in HR? (If not, CATS is not supported.)

A: Yes
 No

Q: 5) Which of your employees should fill out timesheets?

A:

Q: 6) How do your employees enter and track working times?

A:

Q: 7) Are the labor costs calculated based on actual costs or standard rates?

A:

Q: 8) How do you determine these labor rates?

A:

Q: 9) Please explain the procedure, how employees in your company track and report time today.

A:

Q: 10) In which system do you want to run payroll?

A:

Q: 11) Are there special conditions for labor costs when employees work in different countries or for different profit centers (for example, if an employee from the UK works on a project in Germany)?

A:

Q: 12) Do you enter labor in complete hours or clock time?

A:

Q: 13) How do your employees enter trip costs? Are the trips linked to the recording of working time? Describe in detail.

A:

Q: 14) Do you use the SAP employee reporting system?

A:

Q: 15) Identify the different categories of activity (activity types) that you use for estimation, planning and settlement purposes?

A:

Q: 16) What are the various cost collectors, to which employees will charge time (for example, cost centers, projects, internal orders)?

A:

Q: 17) Do sub-contractors and other third party labor sources have to enter work using timesheets?

A:

Q: 18) Are these external services settled to a cost center or directly to the project?

A:

Q: 19) Do you record overtime?

A:

Q: 20) How is the cost of overtime calculated? Do you have different types of overtime (for example, time and a half, double time)?

A:

Q: 21) Do you track indirect labor hours, such as vacation, sickness, holiday...? If yes, define the categories you require and their entry type.

A:

Q: 22) Which financial entries do you currently make for your labor distribution?

A:

Q: 23) How do employees record their working time (time, detail, medium/system)?

A:

1.4.4.4. Time Sheet Permit

Questions:

Q: 1) What is your current timesheet approval strategy for employees and external services?

A:

Q: 2) Explain the permit procedure for working time or recording of activity allocation for your employees.

A:

Q: 3) Do you have an external reporting system for working times?

A:

Q: 4) How many employees does the person responsible for approval manage?

A:

1.4.4.5. Forwarding of Time Sheet Data to PM

Questions:

Q: 1) Do you want to transfer recorded activity allocations to Controlling using the time sheet?

A: Yes
 No

Q: 2) How often does this transfer take place (daily, weekly and so on)?

A:

Q: 3) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

1.4.4.6. Time Sheet Report

Questions:

Q: 1) Which time sheet-based reports do you require (for example, employee utilization, employee hours by cost center)?

A:

Q: 2) Do you need to see days that have not timesheet entries?

A:

Q: 3) Do you need an evaluation, do see the days on which personnel enter more than a defined number of hours?

A:

Q: 4) Do you have to see the employee name in the documents for the receiving component?

A:

Q: 5) Do different roles need to see different timesheet information? (If yes, create report variants.)

A:

1.4.4.7. Service Entry Sheet

Questions:

Q: 1) Do you wish to process or document completion of the services performed by the service provider?

A:

1.4.4.8. Entry of Technical Findings

Questions:

Q: 1) Do you record technical information (for example, which part of the equipment was broken, damage, cause of damage) about a maintenance problem in order to create a service history or to enable further evaluations?

A: Yes
 No

Q: 2) Which technical data should be recorded and who is responsible?

A:

Q: 3) When do you document technical findings?

A:

Q: 4) Do you want to have a coding system, which allows standardized entry of technical information? If yes, list the different categories (for example, damage), for which you want to have codes.

A:

1.4.4.9. Measurement Document Processing

Questions:

Q: 1) Do you measure and record the current condition of your equipment in the system (for example, temperature, pressure, operating time)? Describe the different measuring points and counters that you require for the different pieces of equipment.

A:

Q: 2) How do you proceed if a measurement reading lies outside of a pre-defined measurement range?

A:

1.4.4.10. Measurement Document Archiving

Questions:

Q: 1) Do you want to archive measurement documents? If so, provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

1.4.5. Settlement and Completion

1.4.5.1. Technical Order Completion

Questions:

Q: 1) Who decides whether the work is technically completed and when?

A:

1.4.5.2. Order Settlement

Questions:

Q: 1) Who settles orders in your company and when?

A:

Q: 2) How do you want to settle maintenance orders in general?

A:

Q: 3) How often and according to which rules do you want to settle orders ?

A:

Q: 4) Where should refurbishment orders be settled?

A:

Q: 5) Do you intend to set up a profit center analysis within your company?

A: Yes
 No

Q: 6) Do you want to examine your cost elements for the settlement of orders in greater detail?

A:

1.4.5.3. Business Order Completion

Questions:

Q: 1) Who decides whether the work is fully completed (business completion) and when?

A:

Q: 2) Which criteria do you use to decide whether work is fully completed?

A:

1.4.5.4. Order Archiving

Questions:

Q: 1) Do you want to archive orders? If so, please provide a copy of your document archiving policy. If this is not available, describe specific archiving requirements.

A:

Q: 2) How long do you want to retain orders in the system before they are archived?

A:

Q: 3) Do you want to archive orders?

A:

1.4.5.5. Historical maintenance order - Entry

Questions:

Q: 1) Do you create historical orders to keep track of maintenance work that has already been completed?

A: Yes
 No

1.4.6. Information System

1.4.6.1. Evaluations of Plant Maintenance Information System [PMIS]

Questions:

Q: 1) Which analysis system is defined in your company?

A:

Q: 2) Please describe in detail the different analyses/reports that you will use.

A: