

Work Order Creation & Management
LA-SC-002
Oct 15th, 2008



LaGOV

Version 2.0

Updated: October 10, 2008

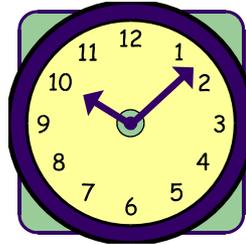


Agenda

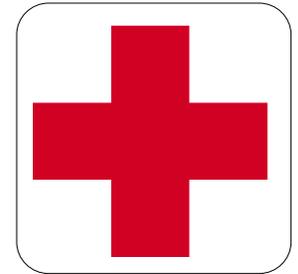
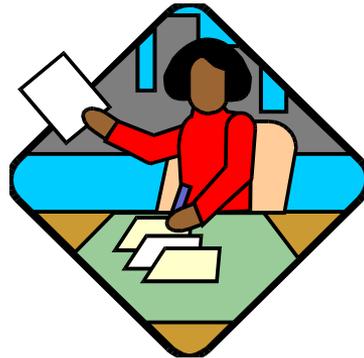
- Ground Rules & Introduction
- Project Timeline
- Workshop Objectives
- Business Process Review
 - Process overview
 - AS-IS process flow
 - Current system alignment
 - Process improvement opportunities
 - SAP/Agile/DOTD terms glossary
 - SAP/Agile concepts & functionality
 - Business process flow
 - Leading practices
 - Enterprise readiness challenges
- Next Steps – Action items
- Questions



Ground Rules



Before we get started ...





Ground Rules

- Has everybody signed in?
- Everybody participates – blueprint is not a spectator sport
- Silence means agreement
- Focus is key – please turn off cell phones and close laptops
- Challenge existing processes and mindsets
- Offer suggestions and ideas
- Think Enterprise
- Ask questions at any time
- One person at a time please
- Timeliness – returning from break
- Creativity, cooperation, and compromise





Introduction

■ Roles

- **Process Analyst and Functional Consultant** – lead and facilitate the discussions and drive design decisions
- **Documenter** – take detailed notes to support the formal meeting minutes to be sent by the Process Analyst to all participants for review and feedback
- **Team Members** – provide additional support for process discussions, address key integration touch points
- **Subject Matter Experts** – advise team members on the detailed business process and participate in the decisions required to design the future state business process

Round the Room Introductions

Name

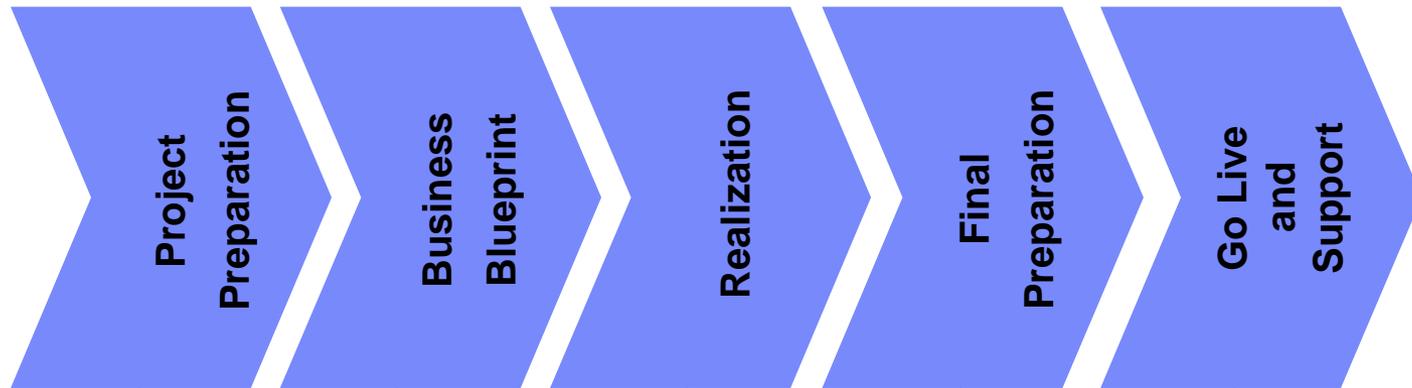
Position

Agency



Project Phases

■ Five Key Phases



- Strategy & Approach Defined
- Project Team Training

- Business Process Definition
- Development Requirements

- Development & Unit Testing
- Integration Testing
- End-User Training Materials

- User Acceptance
- Technical Testing
- End-User Training
- Conversion

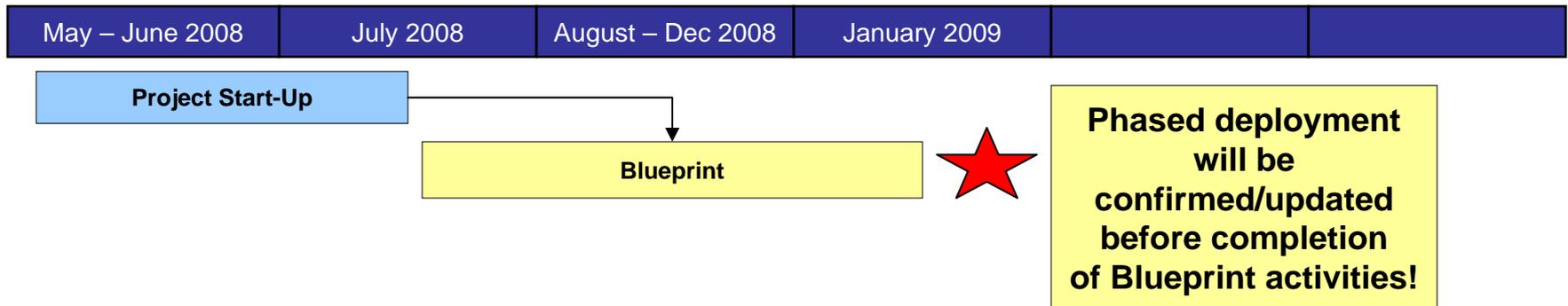
- Go-Live Support
- Performance Tuning



Tentative Project Timeline

- Tentative implementation dates are planned as follows:

Functionality	Tentative Implementation Date
Budget Prep	October 2009
DOTD	February 2010
Core Modules All Agencies	July 2010
Additional Modules	January 2011





Project Organization - Functional Teams

Finance Leads

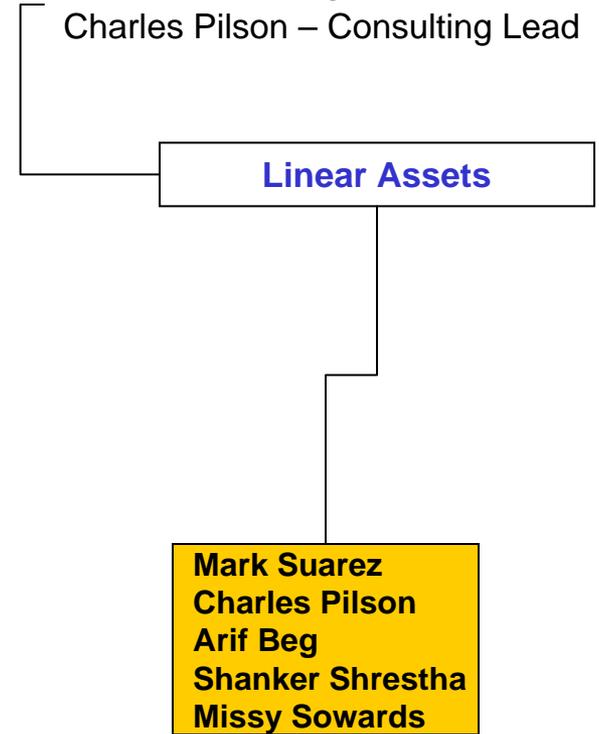
Beverly Hodges – Finance Lead
Drew Thigpen – Finance Lead
Mary Ramsrud – Consulting Lead

Logistics Leads

Belinda Rogers – Logistics Lead
Jack Ladhur – Logistics Lead
Brad Denham – Consulting Lead

Linear Assets Leads

Mark Suarez – Agile Assets Lead
Charles Pilson – Consulting Lead





Blueprint Objectives

- Review and discuss the current or *As-Is* business processes
 - Which helps to drive out the *Business requirements*
 - As well as the *integration points* with other processes
- Define Master Data
 - Address key integration points
 - Support organizational requirements
 - Consistent and appropriate use of data fields
- Define Future or *To-Be* business processes based on:
 - Best Practices inherent in SAP/Agile
 - Intellectual capital from other SAP/Agile implementations
 - State business requirements
- Identify development requirements
 - Which could result in the need for a form, report, interface, conversion, enhancement, or workflow (FRICE-W)
- Understand and communicate any organizational impacts / Enterprise Readiness challenges
- Gather system security authorizations and district-wide training requirements



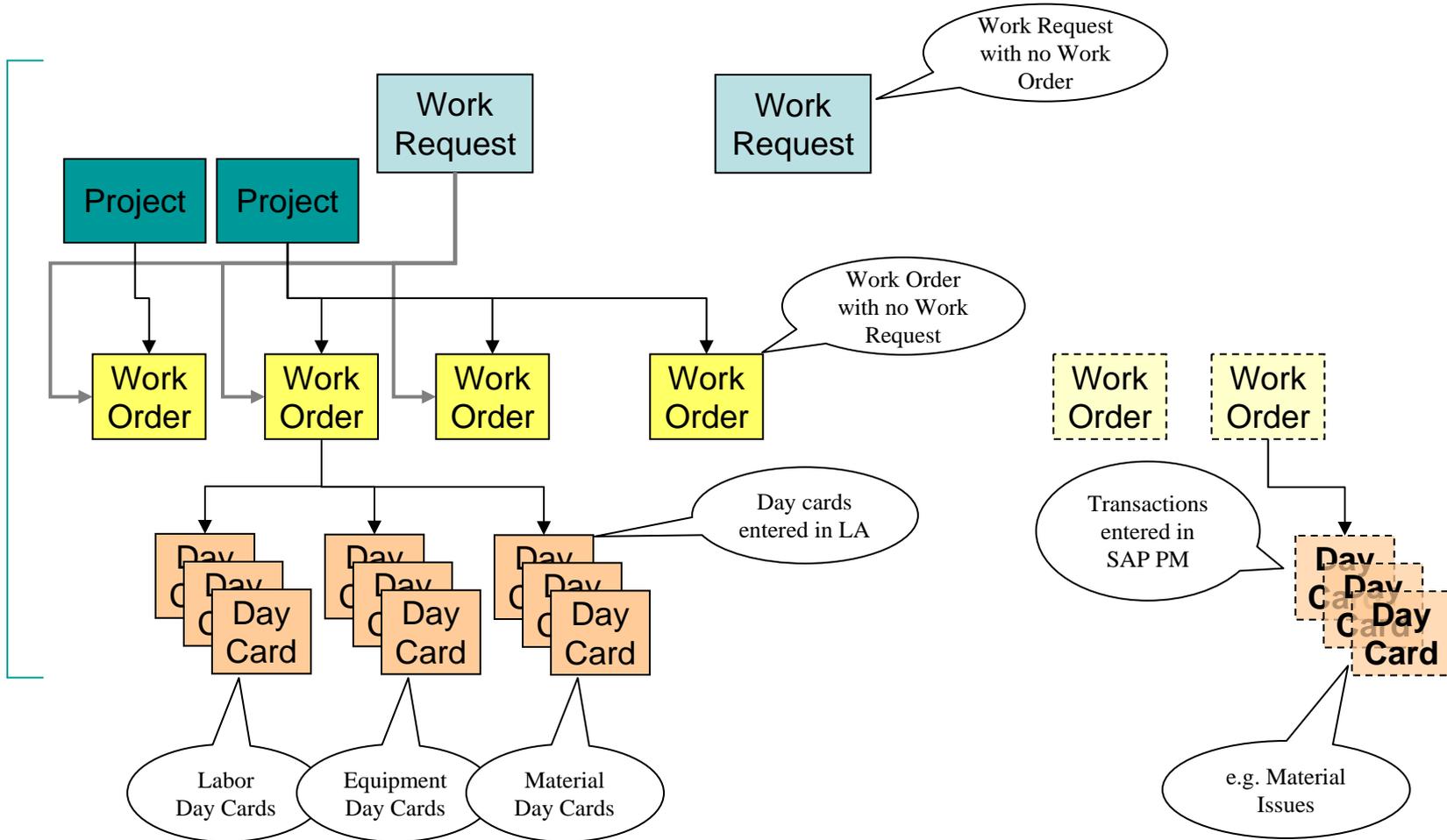
Work Session Objectives

- Main Objectives are to answer the following:
 - Are there any existing policies regarding Work Order creation, management and completion and will they remain in effect? Are new policies and procedures to be developed?
 - What SAP data construct will be used and what will the interface look like?



Entity Hierarchy

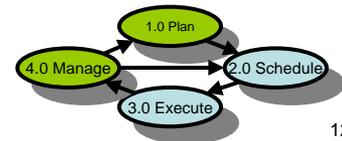
■ Hierarchy





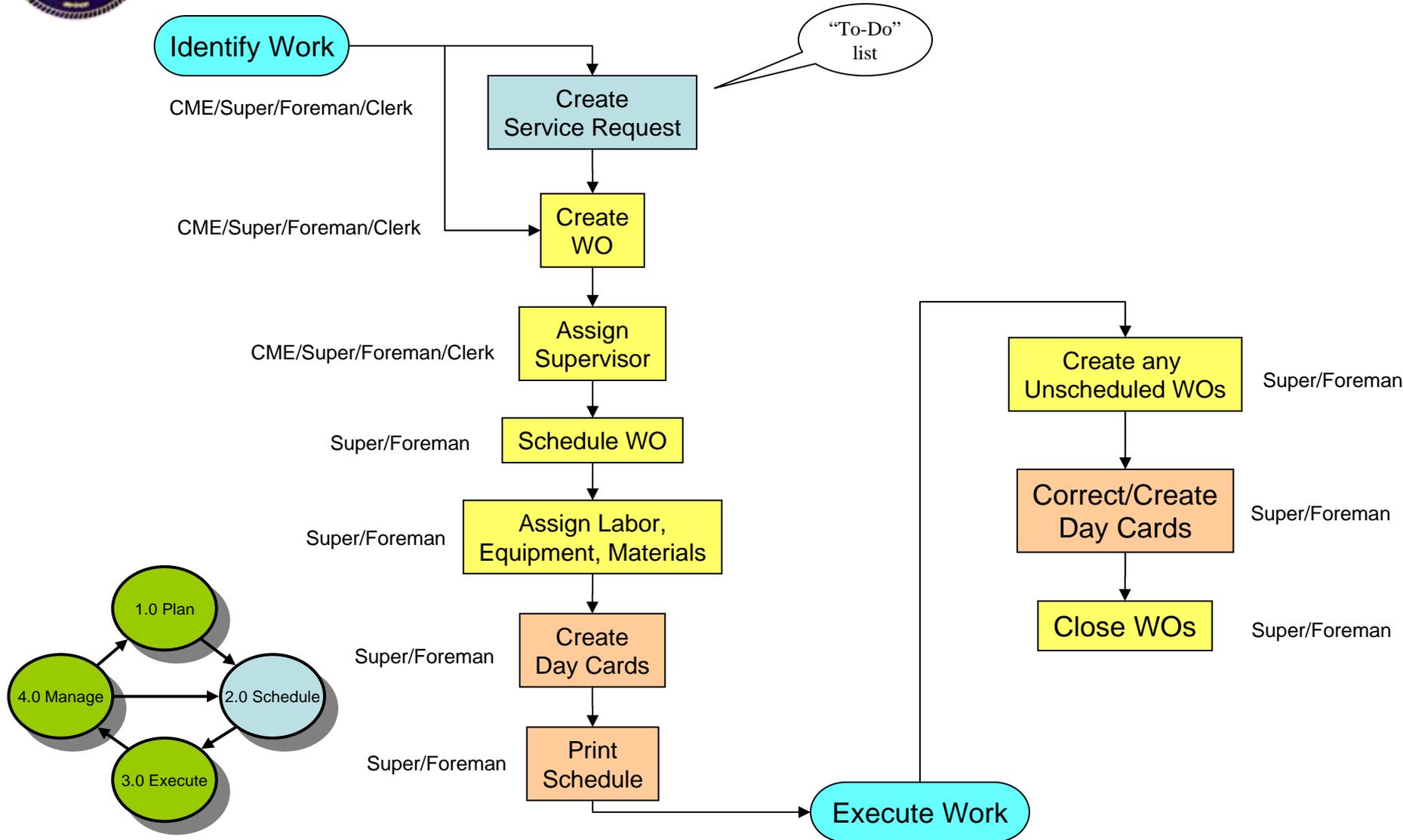
Work Orders

- Can create from:
 - Plans, PMs, Work Requests, Service Requests, Maps...
- Schedule and Enter Time and Resources
- Work Orders form the backbone for managing, and especially capturing, work on Linear Assets
- Cost and Accomplishment information is ultimately used to balance against Condition/Performance measurement for optimization in planning
- DOTD already capturing much of this information in SAP
- Basic capture may move to Agile but passed to SAP for processing





Full Scheduling Process



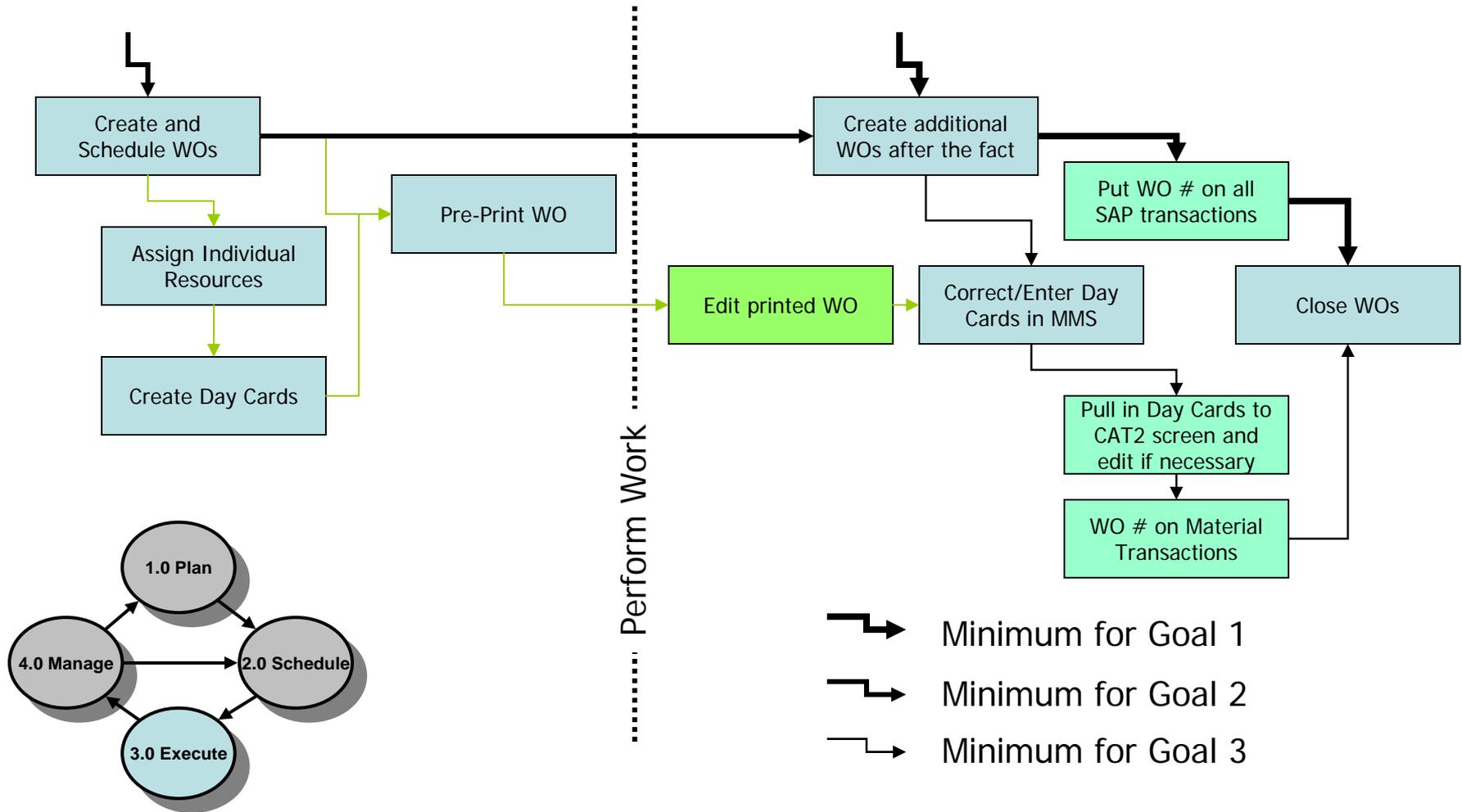


When should I create a WO?

- There are three basic goals for creating WOs:
- 1. To build an Asset or Road History
 - What was **done** when
 - What was **spent** when
- 2. For Scheduling Purposes
 - Putting in WOs representing blocks of time to make up a crew schedule
 - These can then be used (with optional assignment of individual resources) for pre-printing WOs
- 3. To facilitate Time Entry
 - If time is to be entered as Day Cards in the MMS system, a WO is needed to capture the time against



Other WO Work Flow Pathways





Current Work Orders

DOTD Work Order Application

Work Order Number: 1164551

Work Order Data

Work Order | Accomplishment | Equipment | Materials

Overview

Rept Dist Rept Gang Loan Dist. Loan Gang Status **Complete**

Authorization DISTRICT-WIDE ROAD MAINTENANCE

Function EROSION CONTROL AND REPAIR

Location

Remarks

Foreman DONALD FRIELS

Details

Route Dir Milepoint: Begin End Length Miles

Control Section Route Parish RAPIDES Route System Primary

Project Num

Charge Parish RAPIDES System Primary

Structure ID

Equipment ID

Acc/Storm/Vand Ind Identification Code Ramp/Front

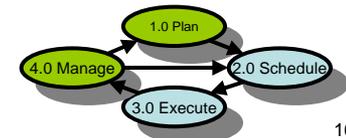
Priority Routine Reimb. Category

Status

Totals: % Complete Complete

Accomplishment EACH LOCATION

Frequency





Work Orders

– **Software Demo... (Optional)**

- Service Request window
- Work Request window
- Work Orders from PM window
- Work Orders from Plan window
- Work Orders from Work Requests window
- Work Orders from Contract Plan window

- “How to Create Short Lists”
- “How to Create a Crew”
- “How to Create a Work Order in the Day Cards Window”

- Scheduling window



Work Order Locations

Assets vs Events, Attributes vs Locations



Asset (e.g. widget)

ID	COLOR	SIZE	LOC_ID
2	Yellow	2.4	7
4	Brown	3.5	6

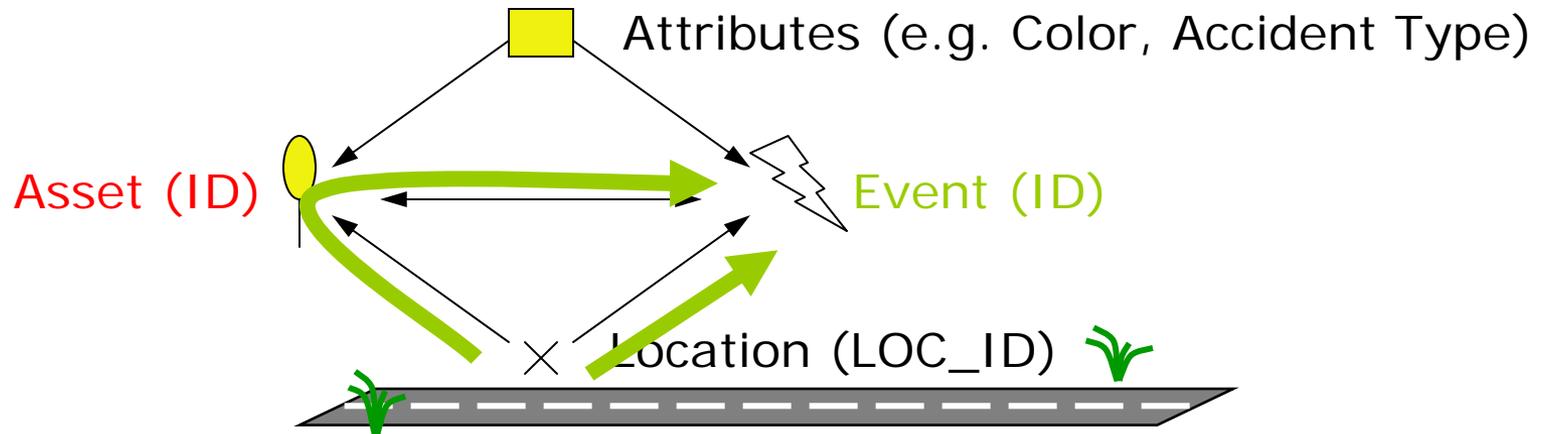
Link

ASSET_ID	EVENT_ID
2	10
2	14
4	14



Event (e.g. Work Order)

ID	ACTIVITY	DATE	LOC_ID
10	Moving	2/3/05	1
14	Shaking	4/5/05	9





Work Order Locations

Utah v1.mxd - ArcMap - ArcView

File Edit View Insert Selection Tools Window Help

1.85,649

100%

Layers

- AMS_UT.GIS_ALL_WORK_O
 - ACTIVITY_ID
 - 68 - 82
 - 83 - 124
 - 125 - 508
 - 509 - 882
 - 883 - 1544
 - route_us_27
- regions
- NAIP2004_Salt.sid
 - RGB
 - Red: Band_1
 - Green: Band_2
 - Blue: Band_3

Identify

Identify from: <Top-most layer>

Location: 431,811.870 4,501

Field	Value
WORK_ORDER_ID	515844
PS_PROJECT_ID	<null>
STATUS	4
OWNER_ID	86
ACTIVITY_ID	70
PROJECT_ID	263615
EFF_DATE	2/21/2006
EFF_MONTH_YEAR	24074
ROUTE_ID	0215N
LANE DIR	0

Identified 2 features

Layer Properties

General Source Selection Display Symbology Fields Definition Query

Show: Fields

Draw quantities using color to show values.

Value: ACTIVITY_ID

Classification: Natural Breaks (Jenks)

Normalization: none

Classes: 5

Classify...

Color Ramp: [Color Ramp]

Symbol	Range	Label
[Yellow]	68 - 82	68 - 82
[Light Green]	83 - 124	83 - 124
[Green]	125 - 508	125 - 508
[Dark Green]	509 - 882	509 - 882
[Blue]	883 - 1544	883 - 1544

Show class ranges using feature values

Advanced

OK Cancel Apply

432343.728 4503382.158 Meters



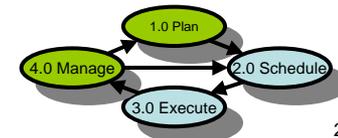
Work Orders

- **Software Demo...**
 - “How to Associate a Asset/Location with a Work Order”



Recording Work

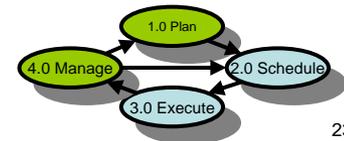
- Can record Time/Work Accomplishments
 - Once a week
 - At the end of the day
 - As it is accomplished
- Double Entry should be minimized
- MUST be Easy
- MUST be Worth It





Work Orders

- **Software Demo...**
 - Capturing work orders on a PDA





As-Is Process Flow

- TBD during Session
- Visio Flow if any



Current Systems Alignment

- TBD during Session
- Visio Flow if any



Process Improvement Opportunities (Pain Points)

- TBD during session



Agile Terminology

- **Work Order** – Single unit of work or Job with the same Activity code that can be scheduled as a single block.



SAP/Agile/DOTD Terminology Mapping

SAP	Agile	DOTD
Functional Areas	Activities	Function Codes
Cost Center	Admin Units	District Gangs
Asset Type	Asset Type	
Equipment (PM) Assets (AA)	Assets	Control Sections
BOM (Set of material items associated with an equipment)	Crew (Set of resources that can be assigned to a Work Order)	
Activity Report	Day Card	
Tool	Equipment	
HR	Labor	



SAP/Agile/DOTD Glossary Continued

SAP	Agile	DOTD
Functional Location	Linear Location	
	Location/LRS	Control Sections, Log miles
Material	Material	
Strategy / Packages / Task List	Preventative Maintenance	
WBS	Projects	Projects/Budgets
Storage Bin	Stock ID	
Interim Storage Bin	Stock Pile	
Work Order (PM) / Internal Order/ Operation	Work Order	Work Order



Business Process Flow

- TBD during Session
- Visio Flow if any



Leading Practices

- Agile Admin Units = SAP Cost Centers
- Agile Work Orders = SAP Work Orders



Enterprise Readiness Challenges

- Potential organizational impacts and training impacts
- TBD during session



Next Steps

- Prepare and send out meeting minutes to invitees.
- Draft Design Document is prepared.
- Follow up on action items identified during the workshop.
- Schedule off-line meeting (s) to discuss areas of special concern
- Plan follow on workshops, as required.
- Plan validation workshop.
- Ensure all to-do's are appropriately documented



Questions?





Notes taken during session...