



# MEETING MINUTES

## State of Louisiana LaGov Project

### *Blueprint Workshop / PM/Fleet Master Data*

08/19/2008 @ 08:30 to 04:30

Location: Room 507, DOTD East Wing

#### LaGov/Logistics Team Attendees:

Dave Gorman	Boyd Barbier
Paul Petro	Lisa Smith (Author)
Dwayne Wilkinson	Steve Gerhart
Rodney Hinesman	

#### Agency Attendees:

No.	Name	Agency	Invited?	Attended?	Comments
1.	Allatto, Gail	WLF	Y	Y	
2.	Badon, Curtis	DHH	Y	Y	
3.	Betts, Roderick	DOA/OSB	Y	Y	On Behalf of Billy Wilson
4.	Breland, Billy	DOC	Y	Y	
5.	Clement, Kirt	DOTD	Y	N	
6.	Fitzgerald, Keith	DHH	Y	N	
7.	Frazier, Glenn	DOA/OSB	Y	N	On Behalf of Billy Wilson
8.	Hirtzler, Shawn	DHH	N	Y	
9.	Hebert, Billy	DAF	Y	N	
10.	Johnson, Darrel	DOTD	Y	Y	
11.	Kropog, Dennis	WLF	Y	Y	
12.	LeBlanc, Kerry	DPS	Y	N	
13.	Lemoine, Karen	DOTD	Y	Y	
14.	Lonidier, Kennie	DHH	Y	Y	
15.	Morrison, Bill	OFPC	Y	Y	
16.	Moss, Mike	DOTD	Y	N	
17.	Pourciau, Eileen	WLF	N	Y	
18.	Ramsey, Gary	CRT	Y	Y	
19.	Rudesill, Pete	DAF	Y	Y	
20.	Rushing, Shannon	CRT	Y	Y	
21.	Rutland, Ray	DHH	Y	Y	
22.	Sowards, Deana	DOTD	Y	Y	
23.	Speights, Rhoama	DOA/OIS	Y	N	
24.	Tumulty, Emery	DPS	Y	N	
25.	Wintz, Morgan	DOC	Y	Y	

<i>Agenda Item and Notes</i>	<i>Owner(s)</i>	<i>Action Items &amp; Assignments</i>	<i>Comments / Follow-up</i>
1. <b>Logistics, Ground Rules, &amp; Introduction</b>	Bobby Hill	<ul style="list-style-type: none"> <li>• None</li> </ul>	
2. <b>Workshop Objectives</b>	Bobby Hill	<ul style="list-style-type: none"> <li>• None</li> </ul>	
3. <b>Project Overview/Timeline</b>	Bobby Hill	<ul style="list-style-type: none"> <li>• None</li> </ul>	
4. <b>Business Process Review</b> <ul style="list-style-type: none"> <li>– SAP terms glossary</li> <li>– Process improvement opportunities</li> <li>– Leading practices</li> <li>– Enterprise readiness challenges</li> </ul>	Dave Gorman	<ul style="list-style-type: none"> <li>• See Below</li> </ul>	Hard copies were provided for “As-Is” Process Work Flow examples, tentative Workshop Schedule, and next session narrative (LOG-PM-003)
5. <b>Action Items</b>	Agencies  Agencies  Agencies  Dave  Rodney	<ul style="list-style-type: none"> <li>• Bring forms, permits, codes, &amp; task lists used for work order processing.</li> <li>• What are the different types of people (titles) that do maintenance. How many in each group?</li> <li>• Bring reports out of legacy systems regarding Master Data.</li> <li>• Where will master data for equipment &lt;1K be maintained?</li> <li>• Look at process for equipment acquisition.</li> </ul>	Does not exist for DOTD. It has since been created and waiting for approval.
6. <b>Organizational Impact</b>		<ul style="list-style-type: none"> <li>• Possible position for creating PMs</li> </ul>	
7. <b>Interfaces</b>		<ul style="list-style-type: none"> <li>• Possible interface with Fuel/Mile data (from MVL entered into Protégé)</li> </ul>	
8. <b>Parking Lot</b>		<ul style="list-style-type: none"> <li>• Fleet/Maintenance BOM</li> </ul>	

## DISCUSSIONS

### August 6, 2008 – Room 1-165 Claiborne:

Bobby conducted workshop overview.

Dave explained the different screens/tabs/fields for master data.

Curtis - Can fields be customized? No.

Morgan Wintz -Security issues around creating functional locations and equipment records. Will discuss.

Gary Ramsey – Can you reset the counters? Yes.

Bill Drake – Is multiple counters a problem? No – you can have multiple counters on a piece of equipment.

Bill Drake – are the hours set up for military time? Yes.

Curtis Badon– when you click on a field, will the system show you info about it? Yes, by clicking F1.

Morgan Wintz – Can you set a priority on work orders? Yes.

Authorizations: (Need to get types of Maintenance positions at the agency), for example:

MDS – Master Data Specialist

MS – Maintenance Supervisor

MC – Maintenance Coordinator

FED – Facilities Executive Director

Need to see forms, permits, and codes used at the agency. Also, samples of task lists used for repetitive maintenance being done.

### August 19, 2008 – Room 507, DOTD East Wing

New Attendees: Shawn Hirtzler (DHH), Eileen Pourciau (WLF)

Curtis asked Dave to give an overview of the project for the new participants.

Dave overviewed the Edit Mask; then, went into SAP with a graphical display of the Edit Mask.

#### **New Entries: Details of Added Entries**

StrIndicator: LA01

StructIndText: State of Louisiana

Structure

Edit mask: XX-XXX-XXX-XXXX-XXXXXX-XX-XXXX

HierLevels: 1 2 3 4 5 6 7

Functional Location edit mask shown above:

Edit Mask		Master List of Future State Edit Mask Requirements: <b>SAP Requisition</b>	
No.	Edit Mask Level	Description	Comment
1.	1	Department	
2.	2	Agency	
3.	3	Section/ Parish/Region	
4.	4	Site	
5.	5	Building	
6.	6	Floor	Floor: (Example: 1 <sup>st</sup> FL, R=Roof)
7.	7	Room	

Dave began discussion of Master Data screens/records:

The screenshot shows the 'General' tab of a software interface. It contains three sections of data entry fields:

- General data:** Class, Object type, AuthorizGroup, Weight, Inventory no., Size/dimension, Start-up date.
- Reference data:** AcquistnValue, Acquisition date.
- Manufacturer data:** Manufacturer, Model number, ManufPartNo., ManufSerialNo., ManufCountry, Constr.yr/mth.

General Tab: Fields will be open and optional. Inventory no. is a free form field for searching. Start-up date and AcquistnValue are equipment related.

Curtis – for fixed equipment, DHH would use all fields.

The screenshot shows the 'Location' tab of a software interface. It contains two sections of data entry fields:

- Location data:** MaintPlant (with dropdown arrow and 'HEI Plant' label), Location, Room, Plant section, Work center, ABC indic., Sort field.
- Address:** Name, Street, Location, Telephone, Fax.

Location Tab: MaintPlant field is a business required field. Other fields will be open and optional. Work Center is used for Production Planning (people/gang). ABC indic. used for criticality at the equipment level, not building.

General Location Organization Structure Warrenty

Account assignment

Company Code ZCC0 HEI - Team 0 Toronto

Business Area

Asset

Cost Center / ZCC0

WBS Element

StandgOrder

SettlementOrder

Responsibilities

Planning plant ZPL0 HEI Plant

Planner group

Main WorkCtr ZWORK0 / ZPL0 PM Work Center

Catalog profile

Organization Tab: Company Code populated by the Maint Plant on the Location Tab. Cost Code created by the Finance Team; but it is an important field. WBS Element, Standing Order, & Settlement Order will not be used. Responsibilities section will be required fields. Planner group will be business required. Main WorkCtr will be craft group. Catalog profile will be default codes. Dave showed an example of catalog codes.

Myron Hall – when will DHH be brought on board with SAP. (July 2011)

General Location Organization Structure Warrenty

Structuring

Functional loc. ZPL0-ZWARE0-ZMAIN0-ZFORK0

Description Forklift

Superord.Equip.

Description

Position

TechIdentNo.

ConstType

Equipment

Pos.	Equipment	Sb-Eq	Description	EqmtType	Mfr
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

Structure Tab: Screen defaults with values from Functional Location. Other fields are optional.

Roderick – Will the serialization interface with HR Objects on Loan? There will not be an interface. “High risk” assets assigned to employees will continue to be “housed” on Infotype 40 – Objects on Loan in the HR module of SAP. There are three comment lines per item where the serial number can be noted.

General	Location	Organization	Structure	Warrenty
<b>Customer warranty</b>				
Begin guarantee	<input type="text"/>	Warranty end	<input type="text"/>	
Master warranty	<input type="text"/>			
	<input checked="" type="checkbox"/> InheritWarranty		<input checked="" type="checkbox"/> Pass on warrrnty	
<b>Vendor/manufacturer warranty</b>				
Begin guarantee	<input type="text"/>	Warranty end	<input type="text"/>	
Master warranty	<input type="text"/>			
	<input checked="" type="checkbox"/> InheritWarranty		<input checked="" type="checkbox"/> Pass on warrrnty	

Warranty Tab: Enter warranty begin and end dates

### Create Fleet Object : Initial Screen

Equipment	<input type="text"/>
Valid On	08/05/2008
Vehicle Type	1000
Equipment category	F
<b>Reference</b>	
Equipment	<input type="text"/>
Material	<input type="text"/>

For Fleet, the Equipment category will be "F". For other objects, the Equipment category will be "M".

### Create Fleet Object : Vehicle ID/Measm

Class overview Measuring points/counters

Organization	Structure	Warrenty	Vehicle ID/Measmnts	Vehicle Techn...
<b>Identification</b>				
Vehicle Type	1000	EquipType	1000	
Fleet objectNo.	<input type="text"/>			
License plate	<input type="text"/>	ValidityEndDate	<input type="text"/>	
VIN	<input type="text"/>			
Chassis no.	<input type="text"/>			
<b>Replacement data</b>				
Replacemnt date	<input type="text"/>	MeasrgPos.	Primary Counter	
OdomRdgReplmen	<input type="text"/>	<input type="text"/>	<input type="text"/>	
HourReplacement	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Transport-relevant data</b>				
Weight	<input type="text"/>	Unit of weight	<input type="text"/>	
Total Weight	<input type="text"/>			
Max.Load weight	<input type="text"/>			
Load volume	<input type="text"/>	Volume unit	<input type="text"/>	
Load height	<input type="text"/>	Unit of length	<input type="text"/>	
Load width	<input type="text"/>			
Load length	<input type="text"/>			
No.Compartments	<input type="text"/>			
<b>Dimensions</b>				
FleetObj.Height	<input type="text"/>	Unit of length	<input type="text"/>	
FleetObj. width	<input type="text"/>			
Object length	<input type="text"/>			

Vehicle ID/Measmnts and Vehicle Technology Tabs: Optional fields.

Shawn will it be able to be displayed without changing the fields. Dave explained security. Shawn also asked about search functionality.

**Create Measuring Point: General Data**

Additional data... Last measurement document...

Measuring point: 3      Cat.: M MeasPoint (general)  
MeasPosition: [ ]  
Description: Hour Meter  
Equipment: 10000000  
Description: Air Compressor

**General data**

Characteristic: HOUR      Hour  
CharactUnit: hrs      Hours       MeasPoint is counter  
Decimal places: 2      FloatPointExp.: [ ]  
Code group: [ ]  
Assembly: [ ]  
AuthorizGroup: [ ]  
MeasReadTransf.:  Supported      Transfer of: [ ]

**Counter data**

CntrOverReadg: 999999.00 hrs       Count backwards  
AnnualEstimate: 2000.00  
Text: [ ]

### Counters

Shawn - can the system generate work orders for recurring preventative maintenance? Yes

**Create Measurement Document: General Data**

Measurement documents Previous measurement document... Last measurement document...

MeasDocument: 1  
Measuring point: 3      Cat.: M MeasPoint (general)  
MeasPosition: [ ] Hour Meter  
Equipment: 10000000  
Description: Air Compressor

**Document data**

MeasurementTime: 12/18/2006 / 16:37:48       Documtd after task  
Characteristic: HOUR      Hour  
CharactUnit: hrs      Hours  
Counter reading: 40.00  
Difference: 40.00  
TotalCtrReading: 40.00  
Valuation code: [ ]  
Text: [ ]  Long text

**Additional information**

Read by: GORMAND  
ProcessStatus:

### Measurement Document

Shannon: With Protégé, enter vehicle fuel/mile data from log but there is a lag time. Will that interface?

### Change Work Center: Basic Data

Plant: ZPL0      HEI Plant:   
 Work center: ZWORK0      PM Work Center

**Basic data** | Default values | Capacities | Scheduling | Costing | Technical data

**General Data**

Work center cat. 0003      Labor:   
 Person responsible ZT0      Bob Smith  
 Location:   
 QDR system:   
 Supply Area:   
 Usage 009      All task list types

Backflush

**Standard Value Maintenance**

Standard value key SAP0      No standard values

Standard Values Overview

Key Word	Description

Work Center  
Usage 009 will always be the same

### Change Work Center: Default Values

Plant: ZPL0      HEI Plant:   
 Work center: ZWORK0      PM Work Center

**Basic data** | **Default values** | Capacities | Scheduling | Costing | Technical data

**Operation default values**

Control key PM01       RefID      Plant maintenance - internal  
 Standard text key:       RefID  
 Suitability:       RefID  
 Setup Type Key:       RefID  
 Wage Type:       RefID  
 Wage group:       RefID  
 No. of Time Tickets:       RefID  
 No. confirm. slips:       RefID      Printer:

Parameter

Parameter	St.	Unit Name

Control Key PM01 will be the same

### Change Work Center: Capacity Overview

Plant: ZPL0      HEI Plant  
 Work center: ZW0RK0      PM Work Center

Basic data    **Default values**    Capacities    Scheduling    Costing    Technical data

**Overview**  
 Capacity category: 002      Person  
 Pooled capacity:   
 Setup formula:    
 Processing formula:   
 Teardown formula:   
 Other formula: SAP008      Proj:RqmtsNetwkMaint  
 Distribution:   
 Int. dist. key:

Control CapacityReduction  
 Formula-Related   
 Formula-Related   
 Formula-Related

Capacity Tab: SAP008

### Change Work Center Capacity: Header

Plant: ZPL0      HEI Plant  
 Work center: ZW0RK0      PM Work Center  
 Capacity category: 002

**General data**  
 Capacity planner grp: ZW0      Planner Group - Trn 0  
 Pooled capacity      Grouping:

**Available capacity**  
 Factory calendar ID: CA      Canada  
 Active version:   
 Base unit of meas.: H      Hour

**Standard available capacity**  
 Start: 08:00:00  
 Finish: 17:00:00      Capacity utilization: 100  
 Length of breaks: 00:00:00      No. of indiv. cap.: 6  
 Operating time: 9.00      Capacity: 54.00      H

**Planning details**  
 Relevant to finite scheduling      Overload:  %  
 Can be used by several operations       Long-term planning

Task Assigned to Team: What are the different types of people (titles) that do maintenance (ie. welders, electricians, etc.). How many in each group?

### Change Work Center: Cost Center Assignment

Plant: ZPL0      HEI Plant:   
 Work center: ZWORK0      PM Work Center:

**Validity**  
 Start date: 06/23/2008      End Date: 12/31/9999

**Link to cost center/activity types**  
 Controlling Area: ZCC0      HEI Controlling Area:   
 Cost Center: 4000      PM Labour:

**Activities Overview**

Alt. activity descr.	Activity Type	Activity Unit	R	Formu	Formula description
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

ActType Int.Proc.: ZPMLB0 PM Labour Costs       SAP008 Proj:RqmtsNetwkMaint

**Link to business process**  
 Business Process:         
 Incentive wages ind.:       Record Type Group:

Dennis – Can this tie into HR for the operator’s hourly rate.

Discussion on operator costs (loaded or actual).

Shawn – asked if the system would have the operator pay rate. Explained that it is linked to HR, but this module will have a “loaded” rate, not just the operator’s hourly rate.

We don’t use the “Technical Data” tab.

### Create Functional Location Task List: Header General View

Func. Loc. FCSS-0301-1-160-000-0171      Gymnasium, 171 GDOE  
 Group 3      Gymnasium, 171 GDOE

Group: 3  
 Group Counter: 1      Gymnasium, 171 GDOE   
 Planning plant: FCSS

**Assignments to Header**  
 Work center: MECH0001 / FCSS      FCSS PM Mechanic  
 Usage: 4      Plant maintenance  
 Planner group: 5      South Maintenance Planner  
 Status: 4      Released (general)  
 System Condition: 0      not in operation  
 Maintenance strategy: MONTH      Monthly  
 Assembly:   
 Deletion flag

**QM Data**  
 Inspection points:   
 Ext. numbering:

Task Lists

Roderick – can the task sheet be sent along with the work order? It is embedded.

Gary – they kick out orders from a calendar, not counter.

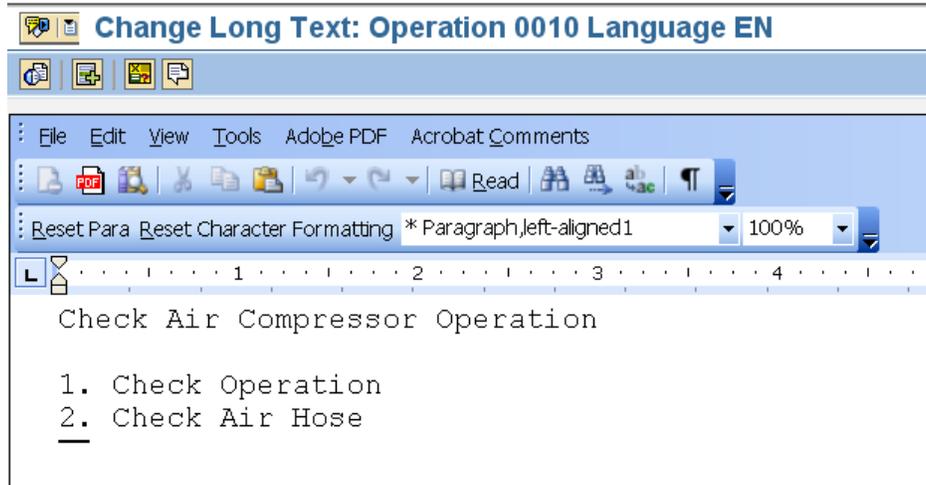
Roderick – for fleet, use the counters for weekly orders.

Equipment Task List generates a task list on the specific piece of equipment.

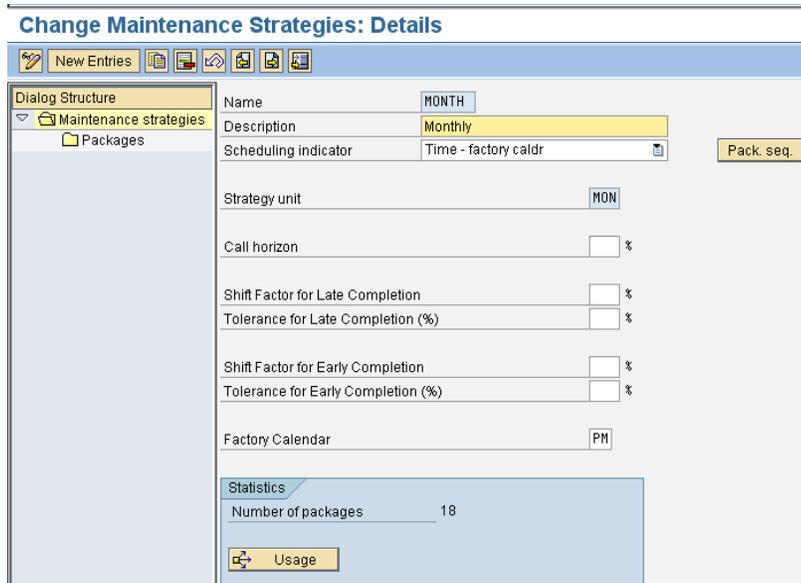
General Task List does not require a piece of equipment.

Dave explained the general task list screen.

Shawn – can you log on to the system and have it print the work orders (PM) that are due today?



Roderick – they have task list in their current system, when we go to switch to SAP it will go to .txt format ... will it have to be modified manually.



Call horizon – usually left blank. If left blank, means immediate show up on back log.

## Create Maintenance Plan: Strategy plan

Maintenance plan

Maint. plan head...

Maintenance plan cycle 12/27/2006    Maintenance plan scheduling parameters    Maintenance plan additional data

Cycles

Cycle	Unit	Maintenance cycle text	Offset
	1 MON	1 Month	0

Item    Object list item    Item location    Cycle item 12/27/2006

Maintenance Item

Reference object

Functional loc.	<input type="text" value="FCSS-0301-1-160-001"/>	Gymnasium, 171 GDOE
Equipment	<input type="text" value="10000000"/>	Air Compressor
Assembly	<input type="text"/>	

Planning data

Planning plant	<input type="text" value="FCSS"/>	Fulton County School System	Planner group	<input type="text" value="PM"/>	Plant Maintenance
Order Type	<input type="text" value="PM02"/>	Maintenance order	MaintActivityType	<input type="text" value="002"/>	Preventive maintenance
Main WorkCtr	<input type="text" value="MECH0001"/>	/ FCSS FCSS PM Mechanic	Business area	<input type="text" value="3700"/>	Operations
Priority	<input type="text"/>		Settlement Rule		
Sales Document	<input type="text"/>	/ <input type="text"/>			

Task list

Typ	Task LstGrp	GrpCr	Description
T	/ 3	/ 1	Gymnasium, 171 GDOE

### Maintenance Plan

Maintenance plan cycle 12/27/2006    Maintenance plan scheduling parameters    Maintenance plan additional data

Date determination

Shift Factor Late Compl.	<input type="text"/>	%
Tolerance (+)	<input type="text"/>	%
Shift Factor Early Compl.	<input type="text"/>	%
Tolerance (-)	<input type="text"/>	%
Cycle modification factor	<input type="text" value="1.00"/>	
Factory calendar	<input type="text" value="PM"/>	

Call control parameter

Call horizon	<input type="text" value="100"/>	%
Scheduling period	<input type="text"/>	DAY
<input type="checkbox"/>	Completion Requirement	

Scheduling indicator

<input type="radio"/>	Time
<input type="radio"/>	Time - key date
<input checked="" type="radio"/>	Time - factory caldr

Start scheduling

Start of cycle	<input type="text"/>
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Dave talked about the Factory calendar.

**Change Class:**

Change Language

Class: COMPRESSOR  
 Class type: 002 Equipment Class  
 Change Number:   
 Valid from: 12/28/2006 Validity

Basic Data Keywords Char. Texts

**Basic data**

Description: Compressor  
 Status: Released  
 Class group: Compressor  
 Organizational area:   
 Local class  
 Valid From: 12/18/2006 Valid to: 12/31/9999

**Same classification**

Do not check  
 Warning message  
 Check with error

**Authorizations**

Class maintenance:   
 Classification:   
 Find object:

**Administrative data**

Assignments  
 Created by: GORMAND Created on: 12/18/2006  
 Changed by: GORMAND Changed on: 12/28/2006

Classes: Where equipment is classified for search and find (i.e. truck, pump, etc.)

Shawn – will we be given a manual on SAP. (Not an SAP manual, but documented procedures on what's implemented.

**Change Characteristic**

Change Language

Characteristic: ELECTRIC  
 Change Number:   
 Valid From: 12/28/2006 Validity

Basic data Descriptions Values Addnl data Restrictions

**Basic data**

Description: Electric  
 Chars Group:   
 Status: Released  
 Auth.Group:

**Format**

Data Type: Numeric Format  
 Number of Chars: 5  
 Decimal Places: 2  
 Unit of Measure: V  
 Template:   
 Exp. display: No exponent

**Value assignment**

Single-value  
 Multiple Values  
 Interval vals allowed  
 Negative Vals Allowed  
 Restrictable  
 Entry Required

Shannon – is asset number the same as the state property tag number? We can set up an equipment number but not necessarily a property tag number.

### Change View "Maintain Permits": Details

Permit: WELDING

Text: Welding

Category: A Work approval

Order release:

Order Completh:

Permit class: PERMIT

Print:

Not modifiable:

Usage:  Usage block  
 Restricted use

Permits: Name with long text or task list attached to it.

### Change View "Catalogs for notification types": Details

Notification type: M1 Maintenance Request

Notification type: 01 Maint. Notification

catalog profile: 000000001 General Catalog Profile

Catalogs for:

Coding	D	Coding
Problems	C	Overview of damage
Causes	5	Causes
Tasks	2	Tasks
Activities	A	Activities (PM)
ObjectParts	B	Object parts

Class.active

Catalog Codes: Dave showed example of codes.

### Change equipment BOM: General Item Overview

Equipment: 10000000 Air Compressor

Plant: FCSS Fulton County School System

Material | Document | General

Item	ICT	Component	Component description	Quantity	Un	As	Sl	Valid From	Valid to	Change No.
0010	L	100000002	Air Hose	1	EA			12/12/2006	12/31/9999	
0020										
0030										
0040										
0050										
0060										

Bill of Material (BOM): Components that make up a piece of equipment. SOB is the only participant using BOMs.

Dave talked about the Roles & Responsibility list handout.

Agencies to bring reports out of legacy systems regarding Master Data.

### August 20, 2008 -- Room 507, DOTD East Wing

Agency attendees: Gail Allatto, Bill Drake, Darrel Johnson, Dennis Kropog, Eileen Pourciau, Karen Lemoine, Kennie Lonidier, Gary Ramsey, Shannon Rushing, Deana Sowards.

Dave overviewed examples of "AS IS" process work flows:

- New Equipment Acquisition
- Create/Change Equipment Master Record
- Create/Change Work Center
- Create/Change Bill of Materials (BOM)
- Task Lists

New Equipment Acquisition Flow Chart:

Gary – asked for clarification of the Equipment Master was for “fixed” or “moveable” equipment.

Gail – asset numbers are assigned to “high risk” or “walkable” equipment.

Action Item: Where will master data for equipment <1K be maintained?

Organizational Impact: Possible position for creating PMS

Action Item: Look at process for equipment acquisition. Response - Rodney – process does not exist at this point for DOTD.

Create/Change Equipment Master Record Flow Chart:

Gail – the field reps submit equipment changes to Corporate.

Create/Change Work Center Flow Chart:

Update equipment master (IE02) does not apply for the state.

Create/Change BOM Flow Chart:

Parking Lot: Fleet/Maintenance BOM

Task List Flow Chart:

Boyd Barbier demonstrated the Mitchell1 software used by DOTD for fleet. Referring to this website could be a possible solution rather than creating comprehensive task lists.

Discussion followed regarding the Motor Vehicle Logs (MVL).

Gary - Can a PM be generated based on the MLVs?

Shannon – The MVLs are audited. Can SAP generate some type of report?

Interface Item: Possible interface with Fuel/Mile data.

Dave Gorman will get with Bobby Hill on MVL and reporting.