MEETING MINUTES

State of Louisiana LaGov Project

Blueprint Workshop / PM Notifications & Work Order Processing

09/30/2008-10/02/2008 & 10/07/2008 @ 08:30 a.m. to 04:30 p.m.

Location: DOTD War Room

LaGov/Logistics Team Attendees:

Dave Gorman	Karen Lord
Paul Petro	Bobby Hill
Dwayne Wilkinson	Sandy Trahan (ERT)
Rodney Hinesman	Lisa Smith (Author)

Agency Attendees:

No.	Name	Agency	Invited?	Attended?	Comments
1.	Allatto, Gail	WLF	Y	N	
2.	Badon, Curtis	DHH	Y	N	
3.	Brand, Paul	DHH	N	Y	On behalf of Kennie Lonidier
4.	Breland, Billy	DOC	Y	N	
5.	Chapman, Jim	DOTD	Y	Y	
6.	Drake, Bill	DOTD	Y	Y	
7.	Frazier, Glenn	OSB	Y	N	
8.	Gilbert, Ronnie	OSB	N	Y	On behalf of Glenn Frazier
9.	Hall, Myron	DHH	Y	N	
10.	Hirtzler, Shawn	DHH	Y	N	
11.	Hebert, Billy	DAF	Y	N	
12.	Johnson, Darrel	DOTD	Y	Y	
13.	Kropog, Dennis	WLF	Y	N	
14.	LeBlanc, Kerry	DPS	Y	N	
15.	Lemoine, Karen	DOTD	Y	Y	
16.	Lonidier, Kennie	DHH	Y	N	
17.	Morrison, Bill	OFPC	Y	N	
18.	Moss, Mike	DOTD	Y	N	
19.	Pourciau, Eileen	WLF	Y	N	
20.	Ramsey, Gary	CRT	Y	Y	
21.	Ray, Sarah	DHH	N	Y	On behalf of Kennie Lonidier
22.	Rudesill, Pete	DAF	Y	N	
23.	Rushing, Shannon	CRT	Y	N	
24.	Rutland, Ray	DHH	Y	N	
25.	Setliff, Cathy	DHH	N	Y	On behalf of Kennie Lonidier
26.	Sowards, Deana	DOTD	Y	N	

No.	Name	Agency	Invited?	Attended?	Comments
27.	Speights, Rhoama	OIS	Y	N	
28.	Tumulty, Emery	DPS	Y	Y	
29.	Wintz, Morgan	DOC	Y	N	

	Agenda Item and Notes	*Owner(s)*	*Action Items & Assignments*	*Comments / Follow-up*
1.	**Logistics, Ground Rules, & Introduction**	Bobby Hill	• None	
2.	**Workshop Objectives**	Bobby Hill	• None	
3.	**Project Overview/Timeline**	Bobby Hill	• None	
4.	**Business Process Review** – SAP terms glossary – As-is Processes and SAP Concepts – Enterprise readiness challenges	Dave Gorman	• See Below	Hard copies were provided for Notification and Work Order "To-Be" Process Work Flows.
5.	**Action Items**	Team	• Define roles for notification processing	
		Team	• Explore notification types and agency customization (user status, etc.)	Notification types & user statuses have been defined.
		Agencies	• Define planner groups…identify by next Tuesday (the last day of the session). Also, indicate "default" or "no default".	
		Team	• Explore how DOTD will use work centers. Meeting to be setup.	
		Team	• Breakdown to be inserted in the Notification To-Be Process	
		Team	• What type of generic codes can be used out of SAP for notification codes?	
		Agencies	• What types of reports would you like to see around notifications and work orders?	
		Team	• Determine initial core notification reports	

		Team	• Find out if fields on notification can be hidden by plant and notification type.	
		Team	• If you have a license for HR, is another license fee required? Who pays for the license fee?	No, another license will not be required. The licenses have been taken care of.
		Team	• Check with IT about document availability from Content Manager to SAP.	
		Team	• Where do you note the vendor for work done on a P-card?	
		Team	• Investigate work order spending limits and workflow routing/information box.	
		DPS	• Pull the cause/damage codes used in Faster.	
		Agencies	• Need # of equipment records, task lists, and functional locations in current system.	
		Team	• For DPS - Notifications for scheduled maintenance (Fleet exception reports)	
		Team	• For DPS, can a notice/email (text message) be sent to the person assigned to the vehicle when the preventive maintenance is due.	
		Bobby	• Schedule a meeting with ORM to see what their activity type needs are.	
6.	**FRICE-W**	Team	• Chain of Custody form used for equipment sent out for repair.	May not be necessary. A notification can be created noting that the equipment has been sent out, since there is a date and time stamp.
		Team	• DPS Report – work order, date, who is/was responsible	
7.	**Organizational Impact**		• Licensing for "non-state" SAP users (Inmates)	
8.	**Parking Lot**		• Personally assigned vehicles & home storage.	

DISCUSSIONS

Dave gave the overview.

As-Is Process Flows:

Rodney clarified the As-is processes, for example – the first 5 boxes for OSB is the “notification”.

Dave explained that a notification is a request to do work.

Karen indicated that the As-is for DOTD is not their basic process. It is more project related, not for “changing a light”. Bill Drake will talk to John Oglesby about their process.

Dave explained the notification types, user status, and priorities.

To-Be Flows:

Action Item: Define roles for notification processing.

Rodney clarified role vs. job position.

Ronnie Gilbert asked for clarification on “who would make that decision on whether or not the notification is a duplicate”. For them, it would be their work control center.

Paul offered a suggestion of a pop-up for notifications submitted.

Dave pulled up Change Notification: Selection of Notifications screen in SAP. Overviewed fields.

Change PM Notification: Maintenance Request – Long text. Ronnie – how many characters allowed? Endless – but 72 across.

Entered a notification with a piece of equipment (which defaulted the functional location) and long text. Showed user status. Bobby – can user status by agency specific? Dave wants to keep as universal as possible, but it could have agency specific listed.

Ronnie – can the user status list for agency be saved as default or does it have to be entered each time? Does not have to be entered each time.

Action Item – explore notification types and agency customization (user status, etc.)

Darrel – are the fields required on the notification? We have to define that.

Planner Group – Darrel asked if the equipment group vs the operations group would have their own code? Yes. The same planner group number could be used by different agencies, but would be designated/described by the plant code used.

Action Item – Define planner groups…identify by next Tuesday, the last day of the session. Also, indicate “default” or “no default”.

Ronnie – can you modify the planner group once it’s been created? You can change the description, but not the number.

Rodney – if changed, how will it affect history? The system will retain it for history and note change from effective date forward.

Rodney – if fields default, can you change it? Yes.

There are two options for Planner Group field: 1) It could be defaulted and work on exception, or 2) Leave it blank. So, do we want to hard code the Planner Group off of the Functional Location? Gary Ramsey – agrees to the default. Ronnie Gilbert – does not want the default, would prefer to enter.

Requesting that the process flow through the notification prior to creating a work order. Example: OSB currently creating WO directly from email or phone call, not creating a notification.

OSB has the notification come from a designated person at the tenant level.

Change Status screen – Bobby indicated that this will mirror the asset management status.

Emery – what does the planner group do? It's a way to route and manage work.

Work Centers – For DOTD, there may be an organizational impact. Instead of the gang, work center may still be setup by trade.

Action Item – Explore how DOTD will use work centers. Meeting to be setup.

Under Responsibilities Section: the Department Resp (Probably will not be used) and Reported by fields do not show up on the work order. Only Person Responsible – but on the Notification side, the person responsible may not be used.

Action Item - Breakdown to be inserted in the To-Be Process

Action Item - What type of generic codes can be used out of SAP for notification codes?

Ronnie – can his data out of TMA be exported or does it have to be entered? We will have to look at TMA for data clean-up and mapping.

Malfunction Tab: Malfunction Start and Malfunction End times will calculate the downtime duration … can be used for trending.

Location Tab: Enter Room and direction (N, S, E, W)

Scheduling Tab: gives you date data.

Rodney asked for clarification that the Reported By is the person with the need. If the work order is printed without the electronic link to the notification, they will not have access to that person's name. The approver should have all the information needed for the work order and enter in the text if need be … for OSB it's written on the work order. The approver is the one to get all the information from the requestor prior to printing the work order so the trade person should not necessarily need the "reported by" name.

Paul asked if the work control center enters one hour/one lamp does TMA reconcile with financials? Ronnie couldn't say for sure, but Dave thinks it is a free form type of field.

Due to the volume of work orders received, Ronnie is concerned about the amount of time necessary to enter the notification…because they are not currently using this functionality (they go directly to the work order).

The functional location, description, and reported by are the key fields needed for a notification.

Rodney asked how much work is reactive vs planned? For OSB and DOTD the majority is reactive.

Do you show P-card purchases against the work order? No, it's against the cost center.

What types of reports would you like to see around notifications and work orders?

- Show all open and in backlog
- Show all approved by planner group or work center
- Show all related to a certain skill
- By User Status (Ex. Need More Info)
- By Functional Location (Building)
- Number of notifications per day

Darrel will also like to see these reports on the work order side.

Darrel - can you add additional reports? Yes, there's standard and ad-hoc.

Discussed Reporting functionality.

Action Item: Determine initial core notification reports

Bill - can the notification screen be set to see only the fields required? It may be set by notification type. Dave will check to see if it can be set by plant.

Action Item: Find out if fields on notification can be hidden by plant and notification type.

Notifications are the source of trend analysis, especially with the breakdown checkbox and downtime.

Discussion followed on changing the work order vs. changing the notification and the flow.

Demonstrated creation of a work order, changing it, and completing it.

Ronnie – is there a way to set up the notification for monthly checks? Yes – using the M3 Activity Type notification.

Ronnie – they perform their monthly inspection and then create work orders for items requiring maintenance.

Revision Codes: Group work orders by "Hurricane" or "Project" for a given event and can be closed.

PMActType – is at a higher level than revision, but is used for "grouping" work orders.

3 types of costs in a work order:

- Estimated
- Planned
- Actual

Darrel – at what point is the work considered a project or capital outlay? Is it monetary? DOTD can go up to $500,000 for a letter bid. Under $25,000 is even different from that. Bidding done for external.

OSB has some facilities that have their own Maintenance budget. For some of the older facilities, they have to go to the legislature for funding.

For salaried employees that do investigations, their time is not captured against a specific work order. It is considered within the scope of their job.

For OSB, the cost center is the "building". The work is charged to the cost center with a maintenance budget. The tenant pays rent, in which the cost is calculated for maintenance.

For construction, OSB will "bill" the tenant. For regular work, the cost comes from the maintenance budget.

For Fleet, OSB has an operating budget to purchase "used" and a capital budget for "new".

For maintenance of those vehicles, there is an equipment section (42) at DOTD that pays for all. Same thing for OSB. For DPS, Fleet has its own budget; there is no transfer of funds between cost codes.

DAY 2

Attendees: same as yesterday.

New attendees: Cathy Setliff – DHH (Pinecrest) and Paul Brand – DHH (Pinecrest) and Herbert Olivier

Dave did a high level review of yesterday.

Karen asked if the agency people can enter the notification themselves. Yes, as long as they have security to do so, they can and should enter it themselves.

Ronnie asked if through security can someone be allowed to only enter only certain fields or once they're in it do they access to everything. It is based on their security role as to what data the user can create, change, delete, etc. … but not to the field level.

Ronnie asked about SAP licensing … is it by seat license? Seat license. If you have a license for HR, is another license fee required? Who pays for the license fee?

Ronnie – can the Reported By field be configured by agency for their “Coordinators”? Each user login can have their own “personal list”.

Ronnie – once the work is complete, does the agency receive notice through the notification or work order? From the work order, you can email the requestor and attach a “customer survey” form and it can be mailed back to you.

Herbert – once the work is complete, does the trade person enter his work or does it go back to someone else? The tradesman will hand write the work he’s done and give to a data entry person to complete the work order in the system.

Herbert – does the customer survey have to go back to the “Coordinator” or can it go back to the requestor? It can go to both as long as they have a valid email address.

Rodney – Once the survey is attached to the work order, you can go back to the work order at any time and view the survey results.

On Display Notification – Selection of Notifications screen – can some of the fields be hidden? Yes

Dave showed the use of transaction codes in the transaction box, the menu path, or by favorites.

IHO1 is the transaction for the functional location listing. For someone entering multiple notifications, this transaction is the preferred method.

The consensus of the group is to use the IHO1 transaction as the preferred method.

Work Orders:

Creating the Work Order through IH01:
Green - Equipment
Lt. Green - Assembly is the equipment BOM
Red – Material
L - Stock Item
N - Non-stock Item

Ronnie – Can the material used be changed after the fact? Yes.

Paul Brand – If you’re waiting on parts for a work order, will you get notified when the parts come in? Yes, you could be notified upon goods receipt that the parts are in; or by SAP email notification.

Permits:

Gary - Can a permit .pdf be stored with the equipment? Yes, you can store as an attachment to the functional location.

Paul – Can a work order be “held” until the permit is received? The work order will be open and held in “CRTD” status until the permit is received.

Action Item: Check with IT about document availability from Content Manager to SAP.

Task Lists: (Predefined steps on how to perform work)

Bill – who creates the task lists? The agencies.

Dave – thought … can task lists be standardized and used by all agencies? You don’t need to go live with this … you can grow into this functionality.

Ronnie – is there someplace within SAP such as a library to house documentation? Not really. Maybe a server could be used with a folder structure for the agencies.

Gary – Every location/park is considered separate agencies. To have a general area to look at the documentation would be beneficial.

Ronnie – can you change the person assigned to the operation on a daily basis? You would need to create a separate line item (operation) in order to assign a different person. When using CAT2 you can have the person charge against the work order and operation.

Darrel – with Revisions, you can create one called “Gustav” and then close the revision when complete.

PM01 – Internal
PM02 – External

Use PM02 for the control key to assign an external contractor to the task list.

From within the work order (after release) you can click through to the purchase order/invoice.

Gary – asked about “Vendor”… for P-card its Bank America. Need to track where work was actually done, example: Jiffy Lube. Where do you note that? Not sure. One way is … on the components tab, you could enter information in text form and place a “T” in the item category field.

How are Refurbishments handled? Gary – fish cleaning station has a pump (2) – use 1 the other is stored; don’t really keep up with refurbishment costs.

For DOTD the refurbished parts come back as a separate item, labeled as refurbished. Costs are averaged back in to inventory.

DOTD creates a work order to refurbish equipment (for internal).

Gary – Chain of Custody form used for equipment sent out for repair. (FRICE Item) Does not necessarily have to be this form, but the agency has to note where the equipment is. When the asset is created can the Chain of Custody form by automatically created? May not be necessary. A notification can be created noting that the equipment has been sent out, since there is a date and time stamp.

For DOTD – it may be necessary to create a work order, because there will be labor confirmation against the equipment. A user status or PM Activity Type could also be used to note these types of work orders.

When you have extra parts after completing a work order, what do you with the extras? For DPS, they go back into inventory. For DOTD, it depends … they have some nested areas. For DOTD Fleet, there is very little extra.

For work orders, would an electronic approval routing, based on a dollar threshold, be beneficial? DPS likes the idea. For DOTD, their repair costs and new costs are two separate issues, so it depends.

Action Item: Investigate work order spending limits and workflow routing/information box.

Gary – How does that “approver” get the work order or know that he has one requiring approval? It could be sent through the SAP email.

Work Order “To-Be” Diagrams:

Ronnie – once someone looks at a work order and determines that it needs to be forwarded to another craft … how can they forward it to another craft electronically? You can change the Planner Group and write a note in the text box or attach a note. You can then email them that they are being sent the work order. If not, procedurally they can refresh their backlog and see the new work order assigned to them.

With refurbished equipment that hits the shelf, you will need to remove it from its original functional location and re-assign it to a new functional location when it gets installed.

Preventive Maintenance:

Change Maintenance Strategies: Overview: Entered a strategy called “month”. When you open the strategy you see the packages with their frequency.

Task Lists: For OSB, they have 4,000 pieces of equipment with task lists. Can that data be exported from TMA to SAP? It's not that simple. The data will need to be looked at and determined if it is in the right format, etc.

Maintenance Plan: You can have the work order show up in your back log prior to the date the work is to be performed, so that you can plan accordingly.

Ronnie – can you use one work order to change all the "air handlers" in one building, instead of having multiple work orders? Yes, you can use the building functional location, and then on the Object List Item tab, list the air handler equipment numbers in the Equipment column.

Schedule Maintenance Plan: You can manually schedule a maintenance plan outside of its normal schedule, if need be.

You set the time frame for work order generation on the preventive maintenance orders (ex. 1 or 2 days prior to its frequency).

For Fleet, the orders are generated by mileage. Mileage is to be recorded when the vehicle is serviced.

DPS - can you pull the cause/damage codes used in Faster. Emery will install Faster on Bobby's computer.

On the Reliability, Preventive, and Predictive "To-Be" Business Process the 11.5.5, 11.5.7, 11.5.8, and 11.5.10 box will be deleted.

Action Item: Need # of equipment records, task lists, and functional locations in current system.

DAY 3

Dave showed the required field checkbox on the notification fields, also pointing out that the field label is in "blue" font color.

What fields on the work order, do you want required? On the work order header, the required fields are functional location and description.

Discussion followed on ways to search for a vehicle. DPS has a vehicle ID number. They need an easier way to search than scrolling through the IH01 tree.

Emery (DPS) – On the work order, how do you know who is assigned to the vehicle (or responsible for)? Currently, there is no where on the work order to make that designation. On the equipment record you can enter the person's name in the sort field. Need to investigate best place for this (need to capture history on maintenance done and who owned it (was responsible for) at that time).

DPS – their preventive maintenance orders are not generated from their system. When the car is issued to the employee, it is the responsibility of that employee to adhere to the maintenance schedule. The work order is then created at the time the employee brings the car in for that maintenance.

Parking Lot – Personally assigned vehicles & home storage

FRICE-W – DPS Report – work order, date, who is/was responsible

On the work order, when you change the control key to PM02 for an external vendor, a pop-up box appears where you can enter the vendor and contract number.

We can't default a value in the "Priority" field, but we can make it a required field. For DPS, a default would be preferred. Consensus is to not make "Priority" a required field.

A work order when created has a status of CRTD; when released it changes to a REL status, ready for scheduling.

Action Item: For DPS - Notifications for scheduled maintenance (Fleet exception reports)

Action Item: For DPS, can a notification be sent to the person assigned to the vehicle when the preventive maintenance is due.

Organizational Impact: Licensing for “non-state” SAP users (Inmates)

CAT2 – Cross Application Time Sheet:

Darrel asked if it were possible to have the Foreman enter time for their crews vs. a timekeeper? Yes, the Time Administrator role could be assigned to the Foreman; but this would be a procedural change for DOTD and would have to be approved.

For the three agencies “on our radar” (DOTD, OSB, DPS) – we need you to start thinking about your buildings down to the floor level so that creation of the functional locations can begin.

Dave re-addressed the Edit Mask. He suggested that we take the functional location down to the building level. You can go to the “Location” tab and enter the room/direction.

Discussion on the list of functional locations available to all agencies. Training Issue: search functionality by the users on the “description”

We’re waiting on the following three decisions from the Financial side:
Plant Code
Business Areas
Cost Centers

October 7, 2008 – Day 4 of PM-LOG-003 & 004

Agency Attendees: Bill Drake-DOTD, Ronnie Gilbert-OSB, Darrel Johnson-DOTD, Paul Brand-DHH, Cathy Setliff-DHH, Sarah Ray-DHH, Gary Ramsey-CRT, Emery Tumulty-DPS

Dave asked the group for their “planner group” codes. The only agency to provide the list is DOTD.

Dave went over the Notification and Work Order codes that the core team developed.

Darrel - will “priority” be a required field? Yes.

Bill – can you change the priority? Yes.

Darrel – can you search for notifications that have extended the priority time line? Yes.

Ronnie – if the supervisor changes the priority of the notification, will the requestor get notified that it’s been changed? No.

Bill – If someone does not use Agile will they see the ZAG1 work order type? We can hide it from them to avoid accidental use.

Paul – Would like to see “vendor repair” as a user status? We will add that as a user status.

Bobby will schedule a meeting with ORM to see what their activity type needs are?

The PM03 Capital Work Order work order type will be secured, as well the ZAG1 type, from accidental use.