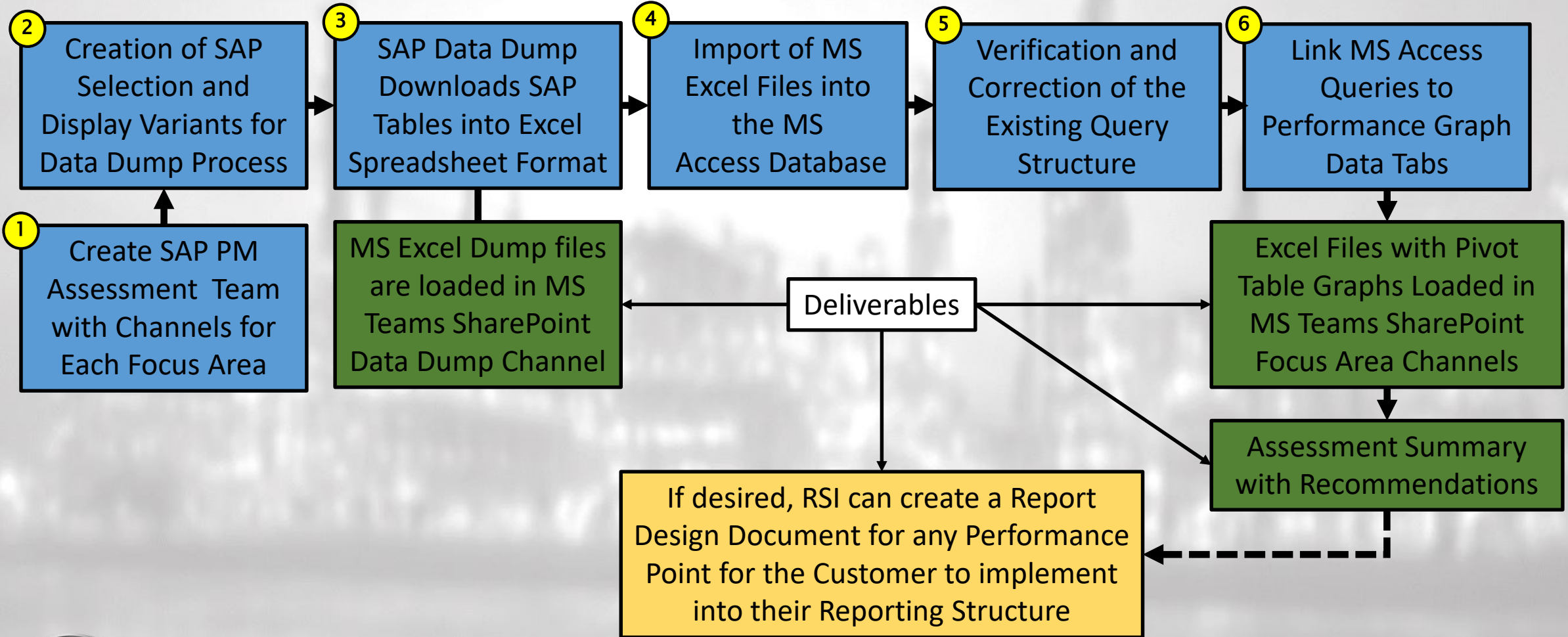


# SAP PM Assessment Process using MS Teams



# RSI SAP PM Assessment Process



# 1 – SAP PM Assessment Team Progress Tracking

The screenshot shows the Microsoft Teams interface for the 'SAP PM Performance' team. The 'General' channel is selected, and a post by Lorri Craig is visible. The post text reads: "We hope all of you and your families are well. As we promised, we are updating our information with the Assessment Information that we promised for you to review. In the attached document, we have added slides 19-29 to what we have already used for you (we wanted to keep everything all together), and we want to use the Team Connection we created, and". The interface includes a search bar, navigation icons, and a list of channels on the left.

The MS Team General Channel is to be used to capture any general communication related to the assessment process by using the Posts.

The screenshot shows the Microsoft Teams interface for the 'SAP PM Performance' team, specifically the 'Assessment Status' planning tab. The interface displays a Kanban board with columns for 'Project Setup', 'Data Dump', 'Database Import', 'Validation and Correction of Database Qu', and 'Excel Perform'. Each column contains task cards with titles, due dates, and assignees. For example, in the 'Project Setup' column, a task is assigned to Lorri Craig with a due date of 08/03. In the 'Data Dump' column, a task is assigned to Lorri Craig with a due date of 08/10. In the 'Database Import' column, a task is assigned to John Hoke with a due date of 08/14. The interface also includes a search bar, navigation icons, and a list of channels on the left.

The MS Team General Channel Planning Tab is to be used track Project Tasks and Responsibilities and will be available to all Team Members in real time.



# 1 – Assessment Point Summary Channel

The screenshot shows a Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The 'Teams' section is expanded to show a list of teams, with 'Assessment Point Summary' selected. The main area displays the 'Assessment Point Summary' channel, which is currently in 'Files' view. At the top of the channel view, there are options: '+ New', 'Upload', 'Sync', 'Copy link', 'Download', 'Add cloud storage', and 'Open in SharePoint'. Below this, a file icon for an Excel spreadsheet is shown with the title 'RSI SAP PM Assessme...' and a timestamp of '2 days ago'. Below the file icon is a table with two columns: 'Name' and 'Modified By'. The table contains two rows of data:

Name	Modified By
RSI Assessment Structure 03_26_20.xlsx	John Hoke
RSI SAP PM Assessment Structure 04_23_20.xlsx	John Hoke

Two black arrows originate from a callout box on the right and point to the 'Assessment Point Summary' team name in the left navigation pane and the 'RSI SAP PM Assessme...' file link in the main content area.

The Assessment Point Channel is to be used to store the current and past versions of the Assessment Point Summaries.



# Assessment Point Summary Channel

Assessment Key Description	Assessment Point Value Proposition	Assessment Point Target	Trans / Table Access Graph A	Graph A
Checks for clear definition of System Statuses (SAP standard) and User Statuses (Customer defined), as well as proper alignment and interaction of the two.	Equipment Statuses define if the Equipment is an active asset in the Plant Structure. Those that are inactive are not allowed Notification or Order Processing. Proper statusing is required to maintain an accurate representation of the Plant Equipment assets.	Equipment System and User Statuses that are well defined, align with each other. Look for clear functionality of sequential User Statuses, and appropriate use of non-sequential User Statuses.	IH08	<a href="#">Equipment by System and User Status</a>
Displays the Equipment Count by Category	Equipment Categories are set up to segregate how Equipment Groupings are configured, namely Numbering, Change Documents, Screen Layouts, and Status Profiles. Examples of Equipment Categories that can benefit from this Functionality are Environmentally Regulated Equipment, Refurbishable Equipment, Consignment Equipment.	Appropriate usage of Equipment Category assignment. The Equipment Category configuration and assignment should match the customers business process needs.	IH08	<a href="#">Display the Number of Equipment by Category</a>
Measures the use of Sub-Equipment in the Technical Object Structure	Using Sub-Equipment is a technique to establish an Equipment Hierarchy. For example, a pump may be the primary process Equipment, while the support Equipment for that pump may be a motor and a variable frequency drive. While the three will function and be measured together to serve a process purpose (hence the hierarchical relationship), utilizing sub-Equipment will allow segregation of Equipment Type specific issues and Failure Coding specific	Verify the instances of the use of Sub-Equipment in the Technical Object Hierarchy.	IH08	<a href="#">Sub-Equipment Assignment</a>

This file can also be Opened in Desktop App by single clicking the button.

By single clicking the 3 dots (...) and single click the Download, the SAP PM Assessment Structure file can be downloaded and saved if desired by the customer.





# SAP PM Assessment Point Summary

Within this spreadsheet, the customer can indicate which Assessment Point to include in the Assessment

View the Assessment Point Description and Value Proposition

View the Excel Files or Power Point Files that represent the Performance Assessment Point Output. Those in yellow are available to view. There can exist any combination of Graph A, Graph B, or Assessment Report for each Assessment Point

Select	Level	Task	Code	Assessment Point Title	Assessment Key Description	Assessment Point Value Proposition	Assessment Point Target	Trans / Table Access Graph A	Graph A	Trans / Table Access Graph B	Graph B	Trans / Table Access Report	Report	Improvement Notes
X	L1 - Maintenance Daily Practices	1 - Work Identification	L1-1P1	Equipment Status Alignment	Checks for clear definition of System Statuses (SAP standard) and User Statuses (Customer defined), as well as proper alignment and interaction of the two.	Equipment Statuses define if the Equipment is an active asset in the Plant Structure. Those that are inactive are not allowed Notification or Order Processing. Proper statusing is required to maintain an accurate representation of the Plant Equipment assets.	Equipment System and User Statuses that are well defined, align with each other. Look for clear functionality of sequential User Statuses, and appropriate use of non-sequential User Statuses.	IH08	<a href="#">Equipment by System and User Status</a>			SE16N - TJ30, TJ31	<a href="#">Display Equipment System / User Status Profile Configuration and Alignment</a>	
	L1 - Maintenance Daily Practices	1 - Work Identification	L1-1P2	Equipment Category	Displays the Equipment Count by Category	Equipment Categories are set up to segregate how Equipment Groupings are configured, namely Numbering, Change Documents, Screen Layouts, and Status Profiles. Examples of Equipment Categories that can benefit from this Functionality are Environmentally Regulated Equipment, Refurbishable Equipment, Consignment Equipment.	Appropriate usage of Equipment Category assignment. The Equipment Category configuration and assignment should match the customers business process needs.	IH08	<a href="#">Display the Number of Equipment by Category</a>			SE16N - V_T370T, V_T370T_A	<a href="#">Equipment Category Configuration</a>	
X	L1 - Maintenance Daily Practices	1 - Work Identification	L1-1P3	Superior Equipment Assignment	Measures the use of Sub Equipment in the Technical Object Structure	Using Sub-Equipment is a technique to establish an Equipment Hierarchy. For example, a pump may be the primary process Equipment, while the support Equipment for that pump may be a motor and a variable frequency drive. While the three will function and be measured together to serve a process purpose (hence the hierarchical relationship), utilizing sub-Equipment will allow segregation of Equipment Type specific issues and Failure Coding specific to the Equipment Type.	Verify the instances of the use of Sub-Equipment in the Technical Object Hierarchy.	IH08	<a href="#">Sub Equipment Assignment</a>					
	L1 - Maintenance Daily Practices	1 - Work Identification	L1-1P4	Functional Location Hierarchy	Checks for uniqueness of the Functional Location Formatting in the Structure Indicator	The structure pattern on a Functional Location Hierarchy is critical to the success of any hierarchical reporting. If all of the assignments are to the same structure, all hierarchical reporting will allow wildcards for Selection Screens. If more than one structure is used, those Technical Objects not assigned to the Standard Reporting Structure may be excluded. A single Structure Indicator will simplify Technical Object Hierarchy navigation.	A logical use of Functional Location level structure with the Maintenance Plant as the Level 1 assignment.	IH06	<a href="#">Active Functional Locations by Structure Indicator</a>					

Cells in yellow are linked to the Output Files directly

View what basic Transaction is needed to access the data



# 2 & 3 – Data Dump Channel

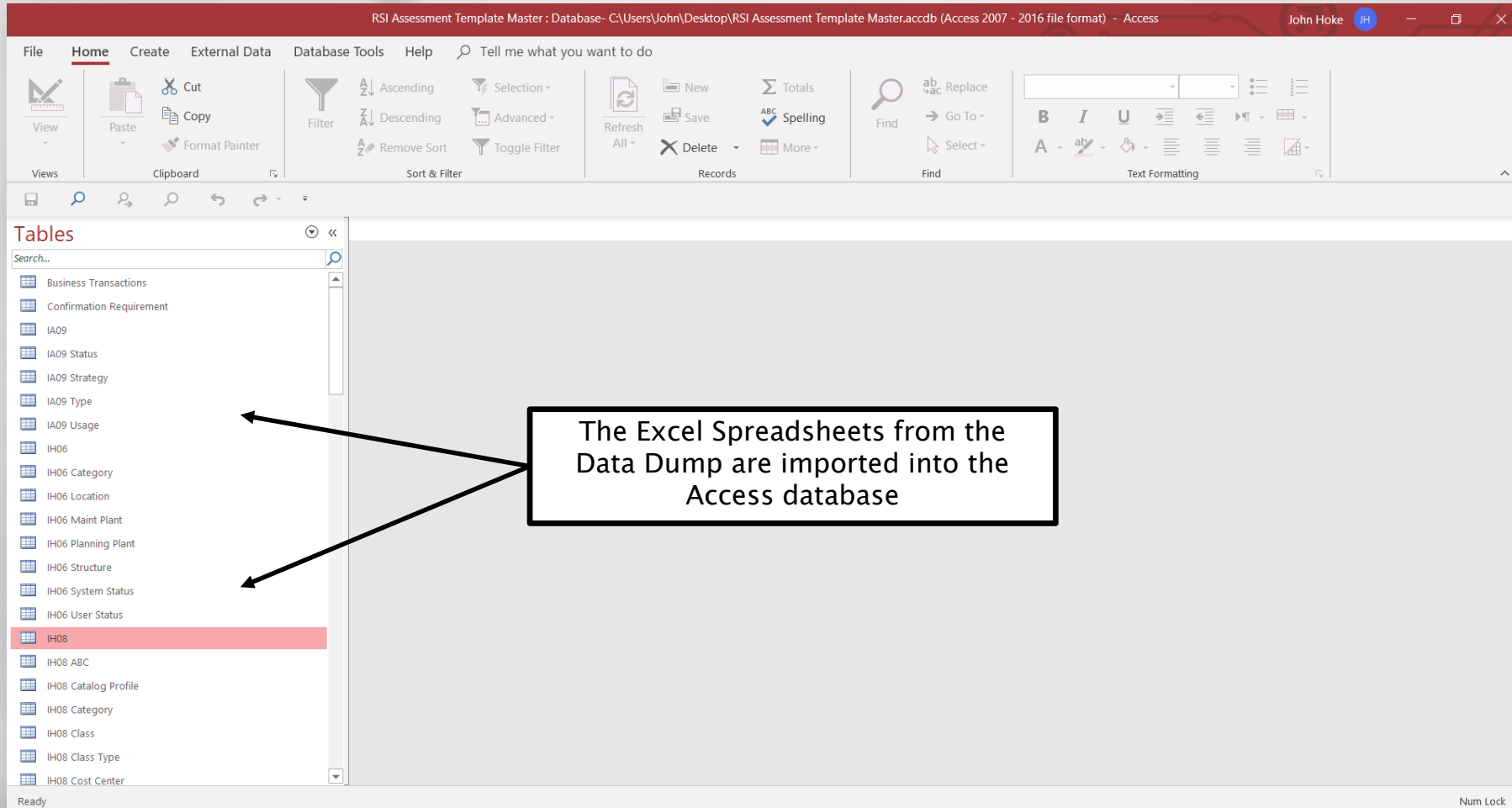
The Data Dump Channel provides a view of the actual SAP PM download files used to build the Assessment Database.

The screenshot shows a Microsoft Teams interface. On the left, a sidebar lists navigation options: Activity, Chat, Teams, Calendar, Calls, and Files. The 'Teams' section is expanded to show 'Your teams' with 'SAP PM Performance' selected. Underneath, a list of channels is shown, with 'Data Dump' highlighted. An arrow points from the text box on the left to this 'Data Dump' channel. The main area displays the 'Data Dump' channel content, including a search bar and a list of files. The files are listed in a table with columns for 'Name' and 'Modified By'. The files are all Excel spreadsheets (.xlsx) and were all modified by 'John Hoke'.

Name	Modified By
IA09.xlsx	John Hoke
IW39.xlsx	John Hoke
IH06.xlsx	John Hoke
IH08.xlsx	John Hoke
IW29.xlsx	John Hoke
SAP Business Transactions 04_21_20.xlsx	John Hoke



# 4 – Assessment Database Engine



MS Access as used as the Data Manipulation Device to create a common process across multiple customers. The design concepts are typically easily transferrable to Business Warehouse , SAP Queries, Custom ABAP Report Design as a design specification.





# 5 – Example of Access Database Query Design

Linking the necessary tables

Field:	IH08.*	Maint Plant Name	ABC Indicator Descrip	ABC Group	Catalog Profile Descri	Work Center Descrip	WC Group	Planner Group Descri	PG Group	EQ System Status Des	Object Type Text	EQ User Status Descri
Table:	IH08	IH06 Maint Plant	IH08 ABC	IH08 ABC	IH08 Catalog Profile	IH08 Work Center	IH08 Work Center	IH08 Planner Group	IH08 Planner Group	IH08 System Status	IH08 Object Type	IH08 User Status
Sort:												
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:												
or:												

The Query Design in MS Access is used to combine and manipulate the Table Information to enhance the presentation and clarification of the Performance Graphs.

Identification and Labeling of desired fields for the Performance Graph



# 5 – Example of Access Database Query Design

The screenshot shows the Microsoft Access Query Design view for a query named 'QU-PM-400'. The design grid is as follows:

Field:	SE16 MPLA	SE16 T351P	SE16 MMPT	PCYC: Package cycle	CYC: Package cycle	PCYCD: [PCYC]/(60*24)	CYCD: [CYC]/(60*24)	Cycle: If([PKG] Is Not Null,[PCYCD],[CYCD])	CHD: [Cycle]-([CH]/100)*[Cycle]	Order LeadTime: [CHD]-[Lead Time]
Table:	SE16 MPLA	SE16 T351P	SE16 MMPT	SE16 T351P	SE16 MMPT					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:										
or										

The majority of the Assessment effort is focused on taking the template Access Database and adapting to specific Customer SAP fields in Configuration. This step is independent of the number of Plants.

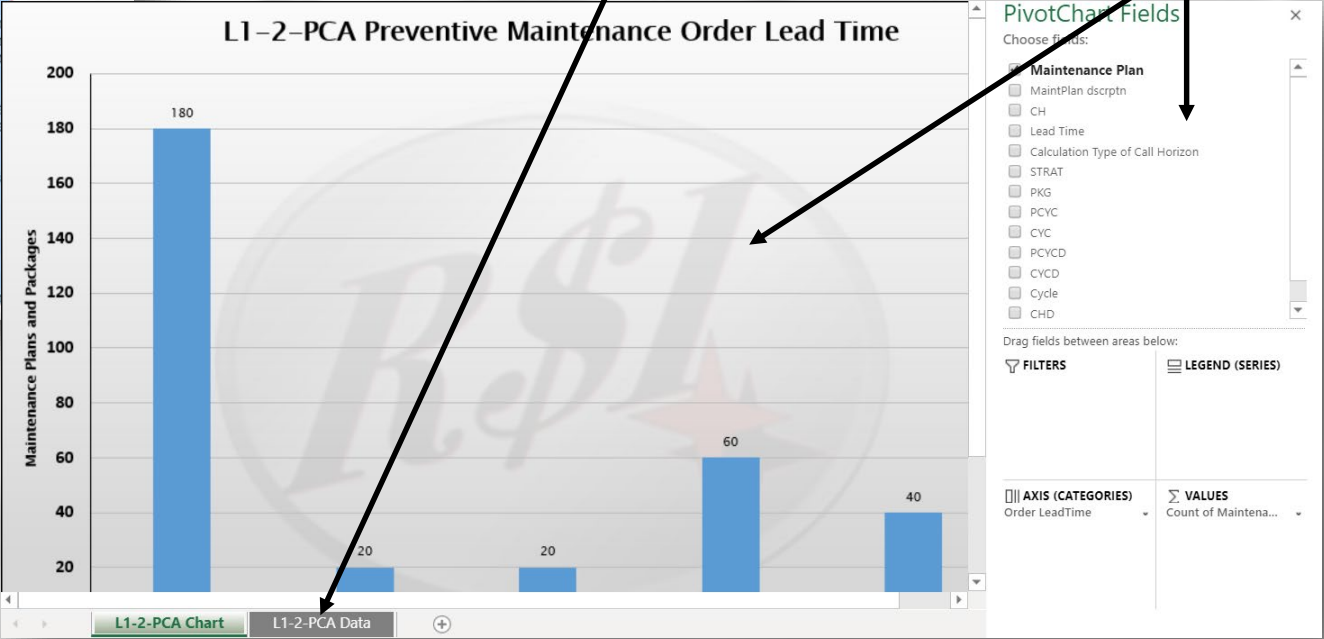


# 6 – Access Database – Performance Graph Link

Maintenance Plan	MaintPlan descrptn	CH	Lead Time	Calculation T	STRAT	Order LeadTime
AIRHANDLER	Air Handler Routine Inspection	0	0	%		30
ATRKOIL	Service Truck Oil Change	100	0	%		0
E30DCALIB001	30 Day Calibrations 001	0	0	%		0
HEPAFILTERPM	HEPA Filter PM	86	0	%		8.4
MANCALLTEST	Manual Call Test	100	0	%		0
MANCALLTEST0	Manual Call Zero Cycle	100	0	%		0
MANCALLTEST2	Manual Call Test 2	100	0	%		0
MANCALLTEST3	Manual Call 1 Day Cycle 2	100	0	%		0
PSI-STYUNLD	PSI Stryrene Unloading	0	0	%		0
PUMPCENTRI01	Centrifugal Pump Running Inspector 0	0	0	%		0
STRATTEST	Strategy Test Plan	100	14	DAY	3MONHE	
STRATTEST	Strategy Test Plan	100	14	DAY	3MONHE	
STRATTEST	Strategy Test Plan	100	14	DAY	3MONHE	
TEST012220	Test For Manual Call	100	0	%		
TESTER	RSI test for Manual Call	0	0	%		
VFD480V001	Siemens VFD Running Inspection	0	0	%		
AIRHANDLER	Air Handler Routine Inspection	0	0	%		
ATRKOIL	Service Truck Oil Change	100	0	%		
E30DCALIB001	30 Day Calibrations 001	0	0	%		
HEPAFILTERPM	HEPA Filter PM	86	0	%		
MANCALLTEST	Manual Call Test	100	0	%		
MANCALLTEST0	Manual Call Zero Cycle	100	0	%		
MANCALLTEST2	Manual Call Test 2	100	0	%		
MANCALLTEST3	Manual Call 1 Day Cycle 2	100	0	%		
PSI-STYUNLD	PSI Stryrene Unloading	0	0	%		
PUMPCENTRI01	Centrifugal Pump Running Inspector 0	0	0	%		
STRATTEST	Strategy Test Plan	100	14	DAY	3MONHE	

The Query is data linked to the Pivot Table Data Tab

...which then drives the Pivot Graph capability of the Performance Graph



# SAP PM Assessment Point Channels

Each Assessment Point selected by the Customer is included in the Level And Best Practice Groupings

The screenshot shows a Microsoft Teams interface. On the left, a sidebar lists various assessment points under the 'Files' tab. The main area displays a list of files for the selected assessment point, 'L1-1 Daily Practices - Work Identification'. The files are organized in a table with columns for 'Name' and 'Modified By'.

Name	Modified By
L1-1-P1A Equipment Status Alignment.xlsx	Lorri Craig
L1-1-P1R Equipment Status Alignment.pptx	John Hoke
L1-1-P2A Equipment Category.xlsx	Lorri Craig
L1-1-P2R Equipment Category .pptx	John Hoke
L1-1-P3A Superior Equipment.xlsx	Lorri Craig
L1-1-P4A Functional Location Heirarchy.xlsx	Lorri Craig
L1-1-P5A Functional Location Links.xlsx	Lorri Craig
L1-1-P6A Notification Technical Object Assignment.xlsx	Lorri Craig
L1-1-P6AA Notification Technical Object Assignment.pptx	Lorri Craig
L1-1-P6B Notification Equipment Assignment Change.xlsx	Lorri Craig
L1-1-P7A Notification Symptom Capture.xlsx	Lorri Craig
L1-1-P7B Order Short Text Comparison.xlsx	Lorri Craig
L1-1-P7R Notification - Order Dependency.pptx	John Hoke
L1-1-P8A Notification Production Impact.xlsx	Lorri Craig

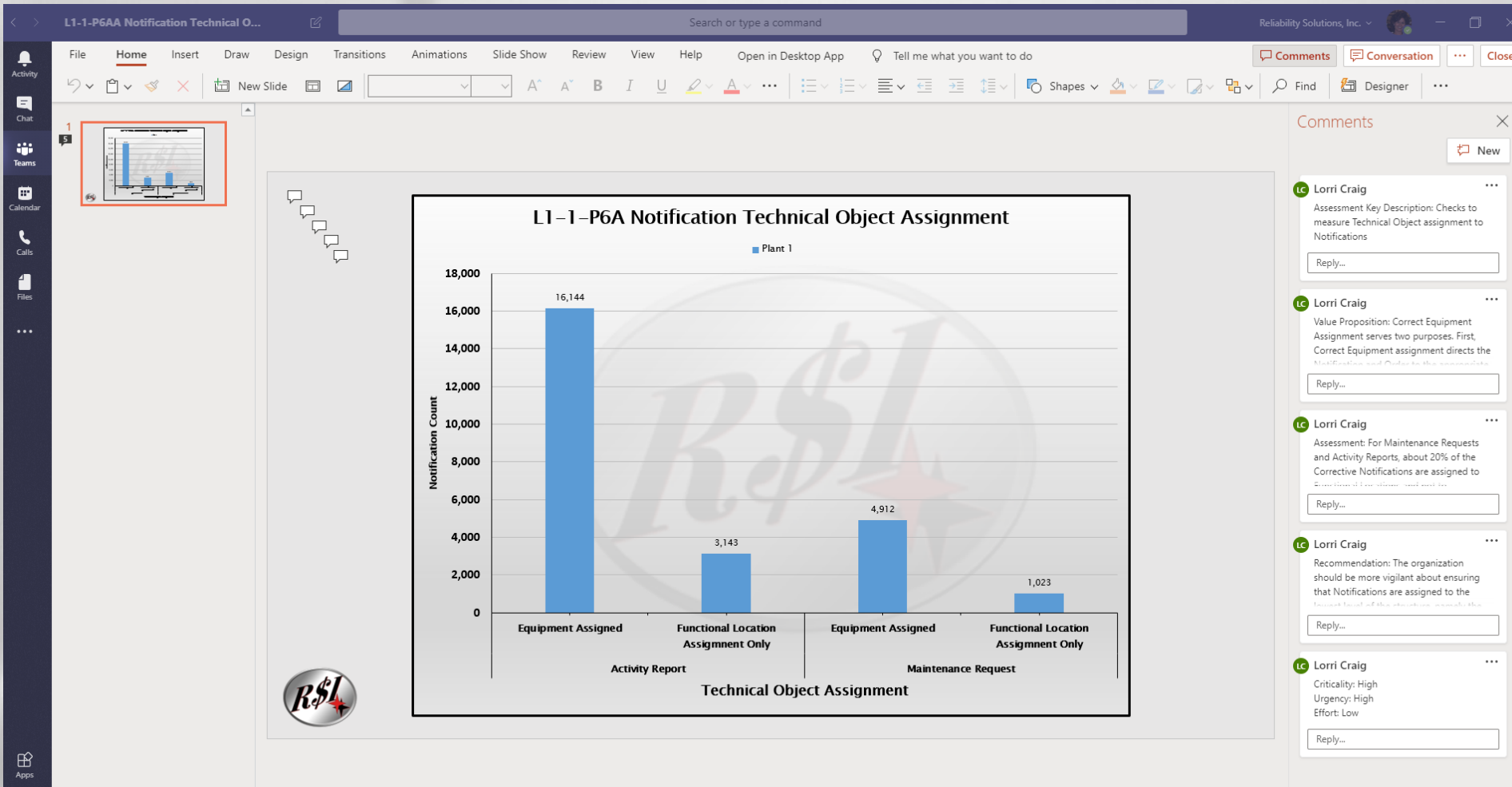
Each Output Document can be accessed by double clicking on the filename

The naming convention for the files are as follows and align with the SAP PM Assessment Structure file on the Assessment Point Summary Channel:  
L1 = Level 1 , 1 = Task  
and either  
P6A – Graph A (xlsx)  
P6B = Graph B (xlsx)  
P6R = Report (pptx)





# SAP PM Performance Team Navigation



Within each of the Graphs there are the following comments:

**Assessment Key Description**

**Value Proposition**

**Assessment – RSI’s interpretation of the Performance Graph**

**RSI ‘s Recommendation Going Forward**

**Rankings –Criticality, Urgency, and Effort Required for the recommendation implementation.**





# SAP PM Performance Team Navigation

The screenshot displays the SAP PM Performance Team Navigation interface. The main content area shows a presentation slide titled "L1-1-P6A Notification Technical Object Assignment". The slide features a bar chart with the following data:

Category	Notification Count
Equipment Assigned (Activity Report)	16,144
Functional Location Assignment Only (Activity Report)	3,143
Equipment Assigned (Maintenance Request)	4,912
Functional Location Assignment Only (Maintenance Request)	1,023

The interface includes a top navigation bar with a "Conversation" button highlighted by a red box. A sidebar on the right contains a "Comments" panel with several entries from "Lorri Craig" and a "Reply" input field at the bottom.

Customer feedback to any of these comments, would go under Conversations. Single click on the Conversation button. The Conversation window will appear and the customer can add feedback that will be seen by all Team member in the Posts Tab.



# SAP PM Performance Team Navigation

Search or type a command

Reliability Solutions, Inc.

Teams

Your teams

- SAP PM Performance
- General
- Assessment Point Summary
- L1-1 Daily Practices - Work Identification**
- L1-2 Daily Practices - Order Control
- L1-3 Daily Practices - Order Planning
- L1-4 Daily Practices - Order Scheduling
- L1-5 Daily Practices - Order Execution
- L1-6 Daily Practices - Order Review
- L1-A Daily Practices - PM Process
- L1-B Daily Practices - MRO Parts and Services
- L2-1 Reliability Improvement - Equipment H...
- L2-2 Reliability Improvement - Failure Analy...
- L2-3 Reliability Improvement - PM Growth
- L2-4 Reliability Improvement - Equipment C...
- L2-5 Reliability Improvement - Predictive M...
- L2-6 Reliability Improvement - Craft Skills
- L3-1 Partnerships - Operations and Mainten...
- L3-2 Partnerships - Operator Performed Mai...
- L3-3 Partnerships - Design Engineering

Hidden teams

L1-1 Daily Practices - Work Identification

Posts Files +

Team

John Hoke set this channel to be automatically shown in the channels list. April 22, 2020

This message has been deleted. Undo

Reply

Today

Lorri Craig 10:28 AM Edited

This graph is really good. Would like to also see Preventive Maintenance Notifications included.

L1-1-P6AA Notification Technical Object Assignment... SAPPMPerformance > L1-1 Daily Practices - Work Identification

Reply

All Conversations will appear on the Posts Tab. The file where the Conversation resides will also be referenced here. This allows for everyone on the Team to discuss or add additional feedback to a specific graph.

