Glossary

The following glossary is an excerpt of the overall SAP glossary, containing the most important terms from the PM System used in this booklet.

ABC Indicator
Indicator in the master record of a piece of equipment or functional location.

Indicator which provides information on the importance of a technical object for a company according to the ABC analysis. According to this, the objects with an A, for example, have the highest maintenance priority for a company.

Activity
The maintenance activity that was carried out. The activity is part of an item in the maintenance notification and describes what has already been done to repair the damage or carry out an inspection.

Activity Report
Maintenance notification describing a maintenance activity that has already been carried out. The activity was not carried out due to a malfunction or damage to a technical system. An activity report documents when and where, for what reason and with what results you carried out a particular activity.
A typical example of an activity report is an inspection or maintenance finding, which documents the technical values of a system.

Assembly
Part of a technical object.

A technical object can be subdivided into assemblies to separate it into more clearly defined units.

An assembly is not an individual object but rather an object category (similar to a material in the SAP System).

Assemblies are used essentially for maintenance bills of material and task lists.

Authorization Group
The authorization group categorizes objects in plant maintenance, such as equipment and functional locations, according to access protection criteria.

Catalog Type
Key that identifies a catalog in Plant Maintenance.
For example, you can compile all the code groups for malfunction descriptions under one catalog type and all the code groups for causes of malfunction under another.
Using catalog types ensures that only the relevant codes can be entered at particular stages in the maintenance notification:
Codes for malfunctions can be entered in the malfunction description fields, codes for completed activities in the item screen.

Call Interval
This determines the length of the scheduling period for maintenance plans.

Example:

If the calls are to be created for a whole year when scheduling a maintenance plan, the call interval must be 365 days.

Call History
Overview of the calls created using the scheduling function.

The call history contains the following data:

- due date
- due maintenance package
- scheduling call type
- status
- call date
- actual deviation

G Glossary

Code
Key for damage and malfunction data, causes of damage and repairs that are entered as technical findings in the maintenance history.

For example, there is a group of codes for damage: code 10 stands for overheating, for example, code 20 for abnormal noise.
Codes ensure that any one occurrence is always entered in the same format and can therefore be evaluated logically. If each employee were able to enter a free text, uniform DP evaluations would not be possible.

Code Group
Key for structuring codes in maintenance. Codes which are similar in content or related in some way are combined in code groups for evaluation purposes.

For example, you can group all the codes for damage to motors in one code group and all the codes for damage to pumps in another. The PM System has code groups for damages, causes, object components, tasks, activities and measured values.

Company Area
Company areas subdivide maintenance plants into production areas.

Machines or sets of machines, which are represented in the system as pieces of equipment or functional locations, are installed in company areas.

You indicate the place for which a maintenance task was requested with the company area.

You can establish a contact person for Plant Maintenance in Production using the company area.

Completion Confirmation
Completion confirmation is part of order monitoring. It documents the state of processing for operations and sub-operations. The SAP System distinguishes between partial confirmation and final confirmation.

Completion confirmation serves to determine

- the work center at which the operation was carried out
- who carried out the operation
- the yield and scrap quantities produced in an operation
- how large the default values actually required were.

Customer
The purchaser of a piece of equipment.

The customer purchases a piece of equipment from the manufacturer.

The customer can then be defined as a vendor and sell the equipment to the end customer.

Data Transfer
Central maintenance of data within hierarchical object structures.
Centrally maintained data is

- transferred from superior levels to subordinate levels (“vertical” data transfer)
- transferred from reference functional locations to allocated functional locations and pieces of equipment (“horizontal” data transfer)

End Customer
End purchaser of a piece of equipment.

The end customer is the end purchaser and owner of a piece of equipment.

He/she has purchased the piece of equipment either directly from the manufacturer or from a customer who has sold it.
The equipment procurement hierarchy can take one of the following forms:

a) manufacturer Þ customer (e.g. wholesaler) Þ end customer

b) manufacturer Þ end customer

Equipment
A piece of equipment is an individual, physical object that is to be maintained independently and which can be installed in a technical system or system part.

Each piece of equipment is managed in a separate equipment master record.

An equipment master record should be created for an object if:

- data is to be managed individually for the object (for example year of construction, warranty periods, usage sites)
- maintenance tasks are to be carried out on the object
- a record of the maintenance tasks carried out is required for the object (e.g. for compulsory annual inspection, insurance or warranty purposes)
- a record of the cost of maintenance tasks is required for the object
- technical data referring to the object needs to be compiled and evaluated over long periods of time

Besides Plant Maintenance, pieces of equipment are also used in

- Production Planning (production resources and tools)
- Quality Management (test equipment)
- Materials Management (serialized materials)
- Sales and Distribution (customer equipment).

Equipment Category
The equipment category differentiates individual pieces of equipment according to usage.

A piece of equipment can be used for example as a

- mechanical system
- device
- production resource / tool.

Equipment Status
The equipment status describes the availability and usability of a piece of equipment. You can use it to define the functions that are permitted for a particular piece of equipment.

Equipment Task List
Maintenance task list with a specific link to a piece of equipment.
You can use equipment task lists to:

- define and maintain maintenance tasks for a piece of equipment
- prepare maintenance plans and orders for a specified piece of equipment

Equipment Type
The equipment category can be subdivided into equipment types and described in more detail.

Example:
Equipment category: “Vehicles”

Equipment type: “Car”, “truck”, “fork lift”

Equipment Usage Period
An equipment usage period represents a period of time during which no changes have occurred to the location, plant maintenance, and sales and distribution data of a piece of equipment.

External Processing
Operations that are not carried out within your own company.

Purchase requisitions are created from the work order for externally processed operations and these are converted into purchase orders in the Purchasing department.

Functional Location
Element in a technical structure (for example a functional unit in the overall system).

Functional locations may be structured according to

- functional criteria
- process-related criteria
- locational criteria.

Pieces of equipment are installed at functional locations (installation / replacement of individual objects at a functional location).

The times at which a piece of equipment is in use at a functional location are documented in chronological order.

Functional Location Category
The functional location category allows individual functional locations to be differentiated according to how they are used.

General Maintenance Task List
Standardized sequence of operations for carrying out particular maintenance work on technical objects.
The general maintenance task list is not linked to a particular object. It contains all the operations, materials and maintenance resources that are required for a particular maintenance task. General maintenance task lists or general task lists help work scheduling in maintenance orders. Above all, they make it easier to create maintenance plans, as you can either refer to them in the maintenance plan or copy them into it.

Link Equipment
Piece of equipment representing the link between one or more pieces of equipment.

Main Work Center
Work center which is in overall charge when a maintenance task is carried out.

Maintenance Catalog
Determines from a functional viewpoint which code groups can be used for a particular technical object.

The maintenance catalog ensures that only appropriate code groups can be used for a particular object, so that for example a type of damage that only occurs in the case of pumps cannot be recorded for a motor.

If a particular maintenance catalog is to be valid for a particular technical object (functional location or equipment), the name of the maintenance catalog must be entered in the maintenance data screen of the appropriate master record.

In addition each maintenance notification type has a default maintenance catalog, which is valid whenever a technical object has not been entered in the maintenance notification, or if no maintenance catalog has been defined for the object. The maintenance catalog for the notification type should be very global, because it needs to be compatible with the more detailed definitions of the maintenance catalogs for equipment and functional locations.

Maintenance Notification
A means by which internal company messages are entered and managed in Plant Maintenance. In a maintenance notification you describe the state of a technical object, request a maintenance task and document the work carried out. This data is stored in the maintenance history and is important for evaluations and for future planning.

Maintenance Order
Means of planning maintenance tasks consistently. This includes

- monitoring the execution of maintenance tasks
- entering and settling the costs incurred by maintenance tasks

The maintenance order data goes into the maintenance history and is important for evaluations and future planning.

Maintenance Package
Bundling of the activities that need to be carried out at a particular point in time or counter reading within the maintenance strategy.

You define the contents of a maintenance package, that is, the operations to be carried out, in the maintenance plan, by allocating each operation to a maintenance package of the strategy entered.

Maintenance Plan
Describes the extent and the dates of maintenance and inspection activities to be carried out on a regular basis.

A maintenance plan consists of a

- maintenance schedule
- maintenance items

The dates are determined from

- the maintenance strategy selected
- the start date of the maintenance schedule
- the last completion confirmation for the maintenance schedule
- various scheduling parameters in the maintenance schedule and in the maintenance strategy.

Maintenance Planner Group
The maintenance planner group is responsible for the planning and processing of maintenance tasks in a particular plant.

Maintenance Plant
Plant in which the technical objects of a company are installed.

The planning responsibility for a maintenance plant is determined by the planning plant. Maintenance plants are allocated to planning plants.

Maintenance Request
Maintenance task which requests the maintenance department to carry out a particular activity.
The activity is not intended to repair a malfunction or damage; a malfunction report has been created for this. The maintenance request is used more in the case of investments, reconstructions, replacements and so on.

Maintenance Strategy
Rule for the sequence of planned maintenance work.

The maintenance strategy defines the frequency with which the individual jobs are to be carried out, for example, every 2 months, every 5000 km, every 500 operating hours, and the overall length of the maintenance cycle.

The activities that need to be carried out at a specific point in time or counter reading are bundled to form a maintenance package.

The maintenance strategy determines the frequency of execution of each maintenance package.

Maintenance Schedule
Describes the dates of the maintenance and inspection activities to be carried out.

Maintenance items that refer to either functional locations or pieces of equipment are allocated to a maintenance schedule.

When a maintenance schedule is prepared, the system generates maintenance calls for all the maintenance items that can be converted to maintenance orders.

Maintenance Task List
Overall term for all task lists used in maintenance.

These are

- general maintenance task lists
- equipment task lists

Malfunction Report
Maintenance notification describing a malfunction of a technical object.
An employee in production, for example, can use a malfunction report to inform the relevant department that an operational system is not functioning correctly, or not working at all, or producing poor results.

Master Record
Data record containing data that stays the same over a long period of time.

A vendor master record contains for example the name of the vendor, the address and the bank details.
The master data of a user in the SAP System contains his or her access authorizations to the system, standard printer and start transactions, among other things.

G Glossary

Material Number
Number of a material master record, which is entered in the master record of a piece of equipment or functional location.

The number indicates that all technical objects with that number are similar in construction. It can be used

- as an anchor for bills of material and task lists.
  These elements do not need to be defined individually for each technical object in this case, but only for the material. They are valid for all technical objects which contain the material in their master record.

- to determine the selection of exchange equipment for a functional location. It serves as a reminder that only pieces of equipment that contain a particular material should be installed at this functional location.

Notification Type
Key that determines the type of maintenance notification.
The following types of maintenance notification exist in the standard PM system:

- malfunction report
- inspection findings
- maintenance findings

Object List
List of technical objects (equipment or functional locations) that were allocated to a maintenance notification, a maintenance order or a maintenance item.

Operation
Describes a workstep in a task list or work order.

Examples of operations are

- inspection operations
- network operations

Operator
End operator / user of a piece of equipment.

The operator is the last link in the process of obtaining a piece of equipment:
producer Þ customer Þ end customer Þ operator
The operator is defined by a customer master record and can be a company, a department or an individual. The operator can also be the customer or end customer.

Planning Plant
Plant in which maintenance tasks are planned and prepared.

These tasks can relate to pieces of equipment and functional locations in your own or other plants.

Plant Maintenance
Measures taken to keep operational systems in working order (for example machines, production installations). According to German standard 31051, the maintenance of operational systems incorporates the following activities:

- inspection
  all measures which confirm the actual condition of an operational system

- maintenance
  all measures which maintain the ideal condition of an operational system

- repair
  all measures which restore the ideal condition of an operational system

Production Resources/Tools
Resources or tools needed to carry out operations at work centers.

A production resource / tool can be:

- a set of instructions
- tools
- measuring and calibration equipment
- NC programs

- drawings
- jigs and fixtures

Production resources/tools can be represented by different master data records such as equipment, material or document master records.

Reference Functional Location
A reference functional location is used to help create new functional locations in the system.

It does not represent a functional location that actually exists in the system but is rather a reference which allows you to create several functional locations that have the same construction.

By changing the master record of the reference location you can make changes centrally to functional locations whose master records refer to the reference location.

Example:
You want to represent five similar clarification plants in the system as functional locations. To do this, first create a master record for a reference functional location containing all the data that is identical for the five plants. Then create the master records for the individual plants by referring to the reference functional location. You then only have to enter the data specific to the clarification plant for each master record.

Reference Object
Equipment, functional location or assembly to which the maintenance notification or order refers.

Regular Maintenance
All maintenance tasks that can be planned in terms of the timing and extent of the work involved.

General term used for inspections, planned maintenance and servicing and planned repairs.

Shop Papers
Documents required for the execution of a maintenance order, such as:

- operation control ticket
- job ticket
- material provision list
- wage slips
- completion confirmation slips

Superior Equipment
Technical object comprising several pieces of equipment.

The structure of a complex technical object can be represented by allocating equipment or superior pieces of equipment. A piece of equipment that is allocated to a superior piece of equipment can itself be a superior piece of equipment for another piece of equipment. In this way a hierarchical structure develops.

System Availability
Performance measure for describing the degree of usability of a system, determined as the ratio of available time to base time.

In Plant Maintenance, system availability is entered as part of the completion confirmation:

- time and duration of the breakdown
- availability of the technical object before, during and after the task
- operating condition of the technical object before, during and after the maintenance task

Task
The maintenance activity that is to be carried out.
The task forms part of the maintenance notification and describes what is to be done in terms of repairing the malfunction or of inspection.

G Glossary

Technical Report
Results determined while processing maintenance tasks.

The technical report refers exclusively to the data of technical objects before and after a maintenance task. It comprises the following data:

- damage location, damage description, cause of damage, tasks, activities
- system availability
- classification

This data goes into the object history.

Usage List
The usage list represents the summary of how a piece of equipment has been used to date.