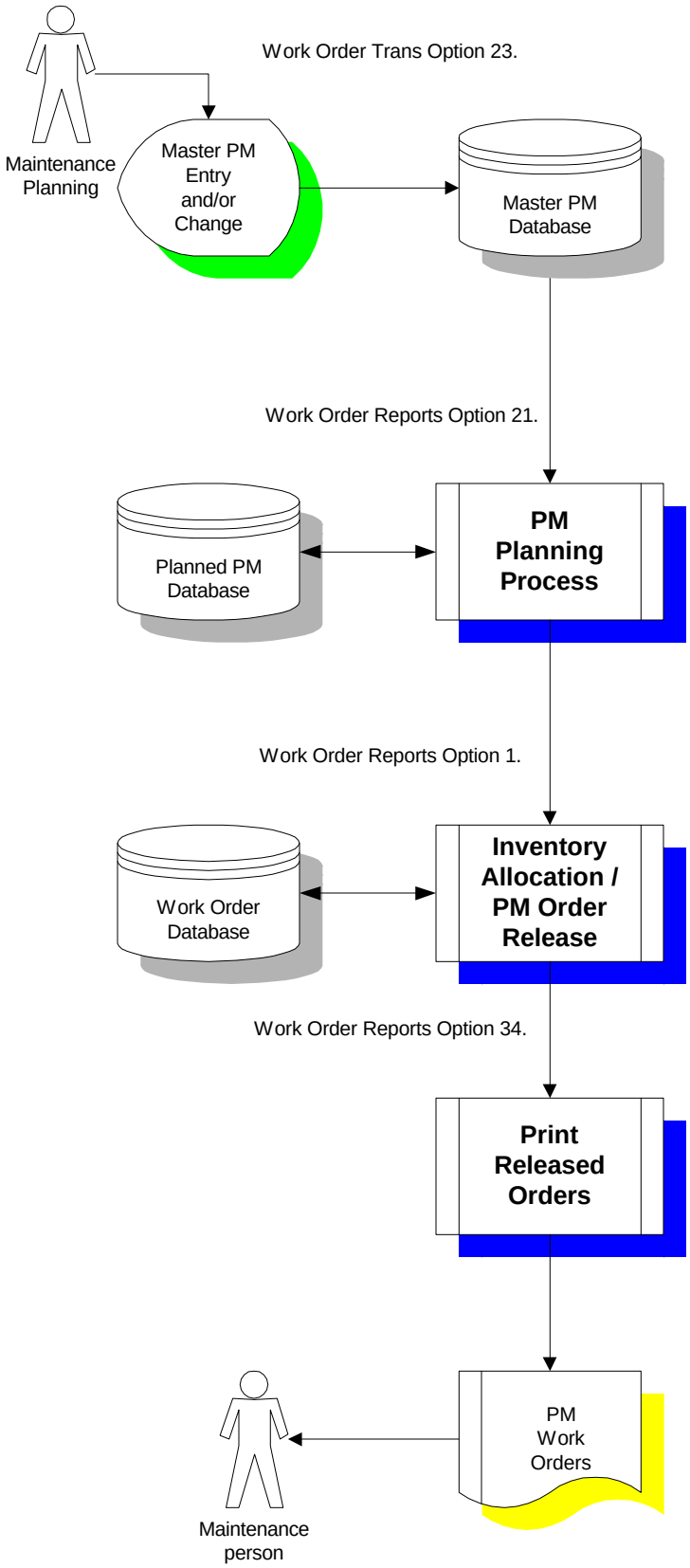
PM Planning System

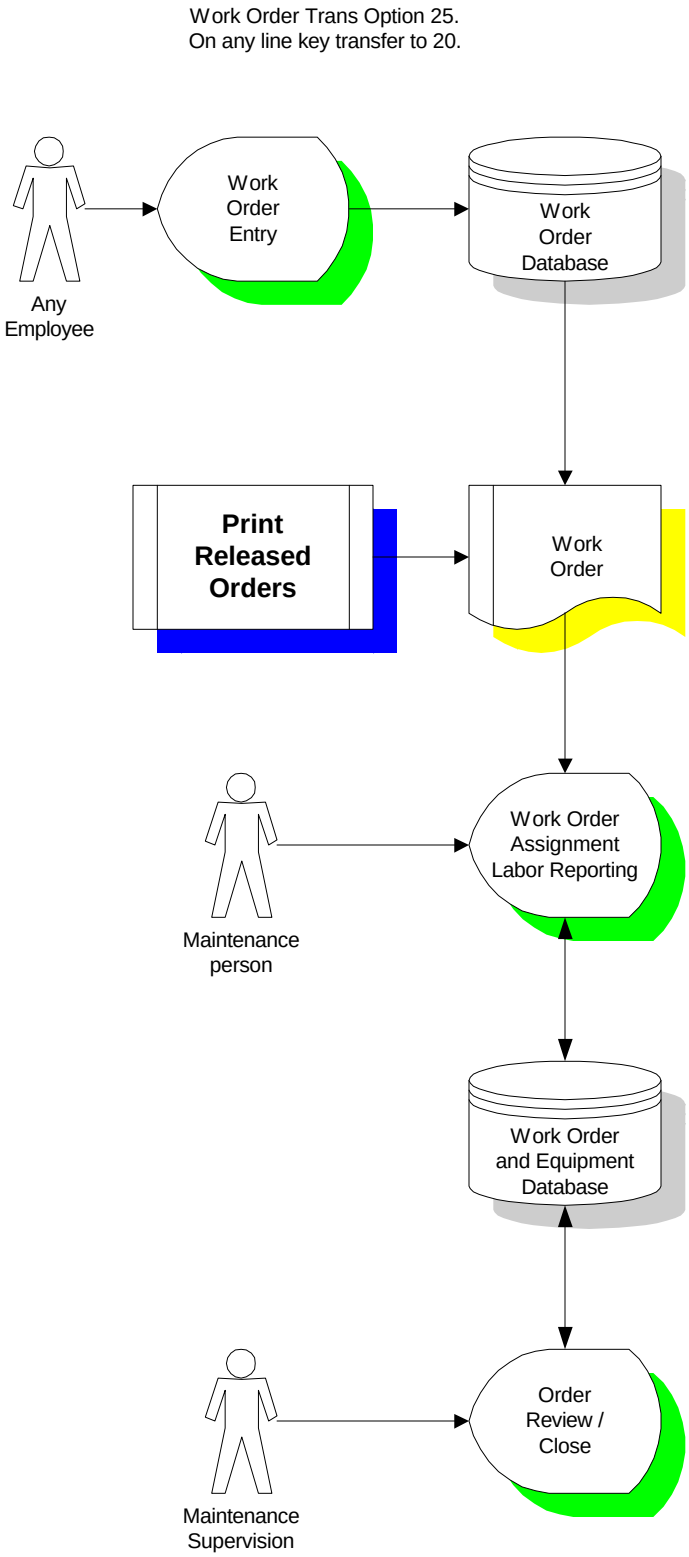


For each unique frequency that a PM should occur by maintenance entity, one master plan is required. Use MI23 to create a new master plan. A master plan may have many steps or tasks. These tasks are created using MI21. Each task may require many inventory items to replace and / or use during the PM. Specify these items using MI22. The master plan will not be selected for planning unless the status is 300. This allows you to leave master plans in a unfinished status at the end of the day without the fear of creating incomplete PM work orders. Based upon the frequency of the master plan, PM's are created to support one full year of planning.

This process will line up by stock keeping unit (SKU#) and required date, all released orders with a balance to be issued, and all planned PM work orders with a start date within a 3 (user defined) days of today. Inventory will be allocated to these orders on a first come-first serve basis. All orders where inventory is insufficient to be performed will appear on a material shortage report. All planned PM orders that have sufficient inventory to be performed will be released which protects the order from any further automatic changes by the planning process.

This process prints all released PM orders that have not previously printed. These PM's are due and have sufficient inventory to complete. They must now be assigned to a maintenance man to be completed. They can be assigned by supervision using MI28. They may also be assigned to oneself using MI36 (The maintenance man's in basket of assigned work)

Work Order Flow



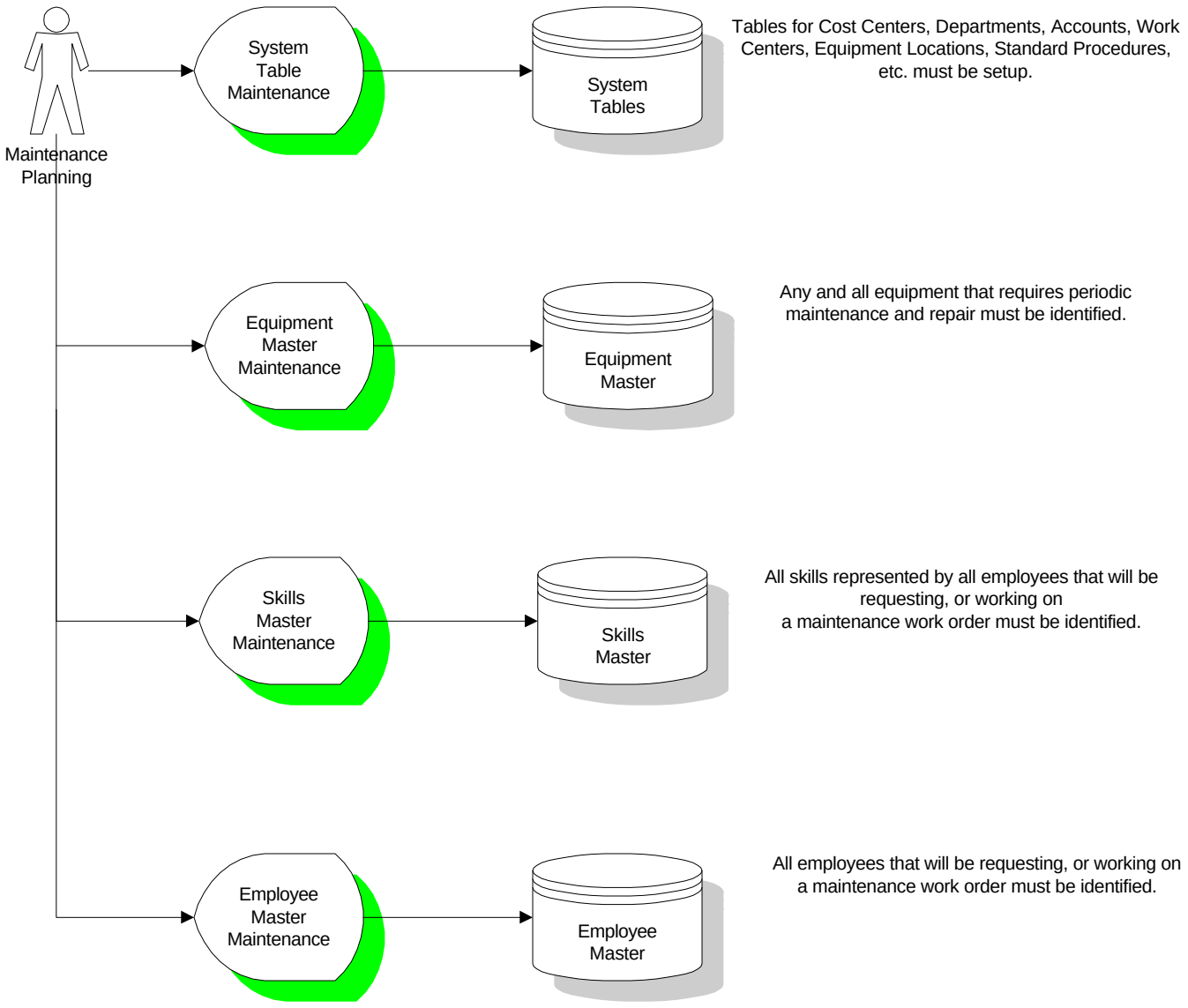
Work Order Entry may be performed by anyone within the facility who identifies a problem that needs correcting or an out of service condition. When created on demand, an order is printed immediately at a pre-defined printer for the person responsible for maintaining the equipment.

Work orders are printed upon entry and also when requested to print all PM orders in a released and due status. In either case, someone must be assigned to do the work. This may be done by supervision or self assigned depending on your procedures and policies. Supervisors use MI28 to assign work orders to employees.

Employees use MI36 to assign work to themselves. This program displays work already assigned. It also allows assignment of new orders. It is where employees report their time, materials, miscellaneous charges and problem resolution.

Supervisory review and closing of each order guarantees that the information you are trying to capture is being recorded. All good systems require data recording disciplines.

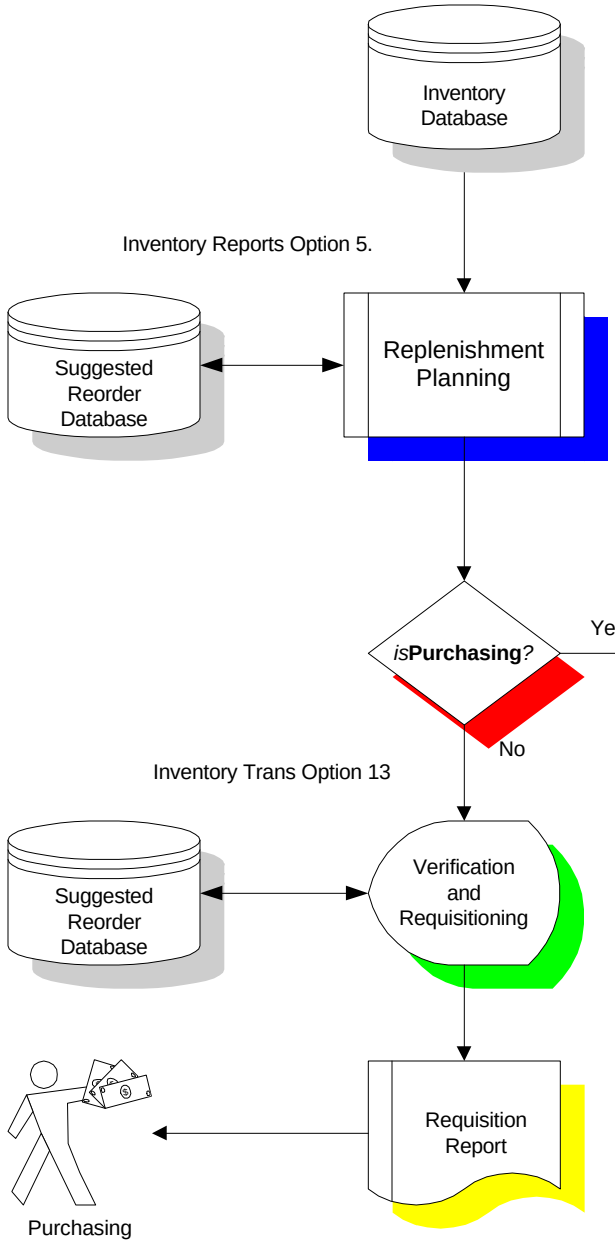
Work Order / Planning System Setup



Work Order System Support

The work order support system is designed in such a way that one program acts as the hub for any information that is desired to see. This program allows direct access to many other programs for a specific work order that was searched for using MI25. Work orders can be searched for by: Equipment, Department, Work Center, Cost Center, Skill, Requester, Project#, and filtered on: Order Type, Order Status, Equipment Status, Task Status, Responsibility, and Assigned/Unassigned Status.

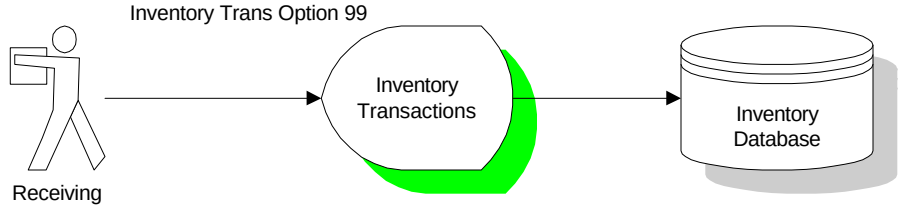
Inventory Replenishment



Each stock keeping unit (SKU#) that is to be controlled by this system must be entered into the part master using MI01, and the inventory master using MI02. All physical locations within the facility where inventory may be stored, must be created using MI03, before receiving or adjusting on hand. The system assigns the sku#. The catalog # is what the part is known as. One catalog # is required, many additional cross references to this sku# may be created. Noun and Modifier are very important fields to establish standards for. They are each 15 characters and through some standardization can be extremely helpful when looking for a specific kind of part. Noun is like a category and Modifier is like a sub-category. If Noun were Motor, Modifier could be 5-HP, 10-HP etc. The system will select all sku's where an *order point* is present and compare it to available inventory. When the available inventory falls below the *order point*, a suggested re-order is created for a quantity equal to the *order quantity*.

To see how *is*MIMICS and *is*PURCHASING work together, refer to PURCHASING SYSTEM diagrams.

This process requires the stock room supervisor to review the suggested re-orders for date and/or quantity revisions before creating an inventory requisition for the sku#. The purchasing system interface included in the base will print a requisition for the purchasing department and update the on order value in the inventory master. When the parts are received by the purchasing system and sent to the maintenance stock room for put away, a special adjustment transaction is keyed using MI99 to transfer the received quantity from on order into on hand. (From=MPO, To=STK).



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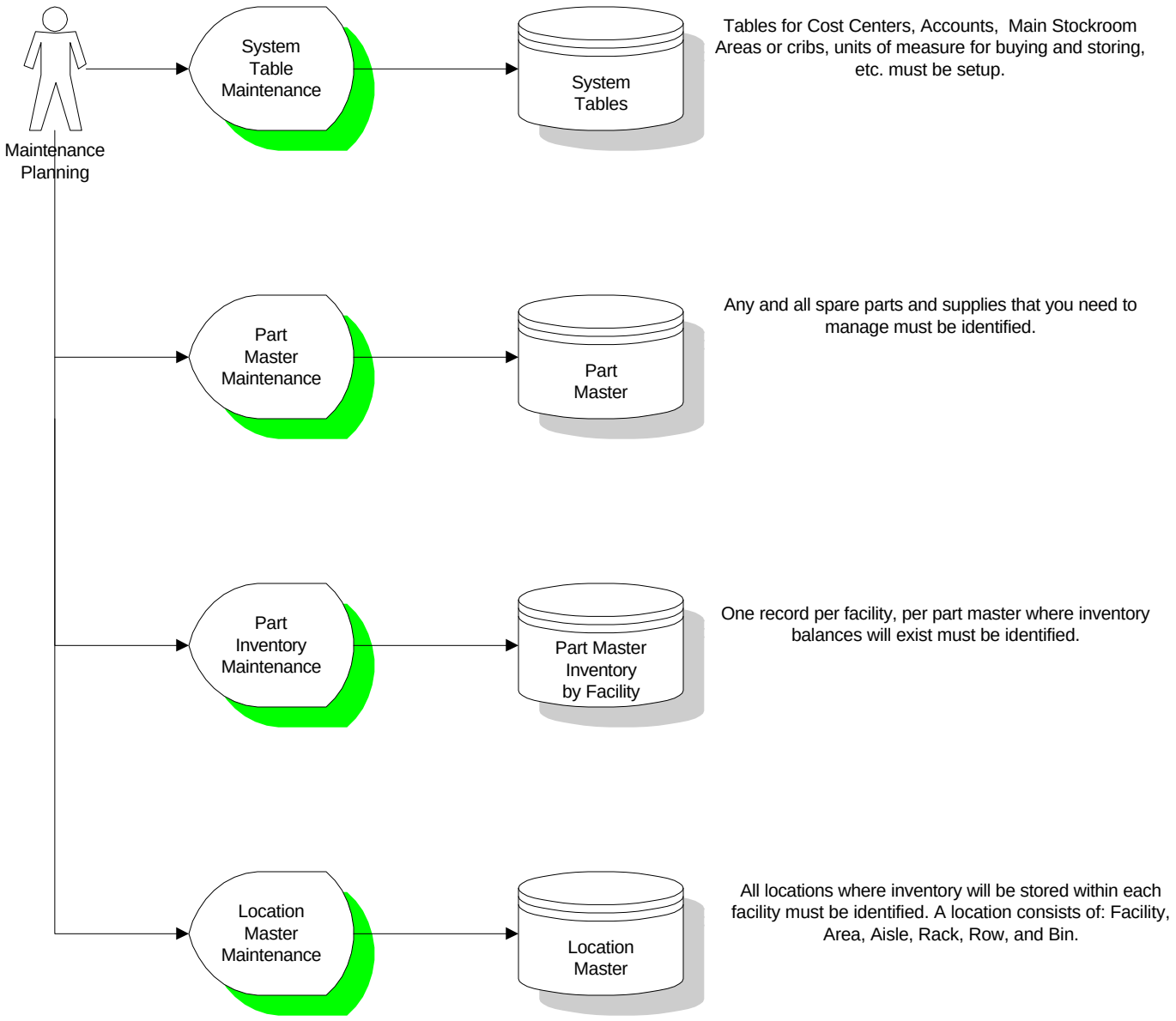

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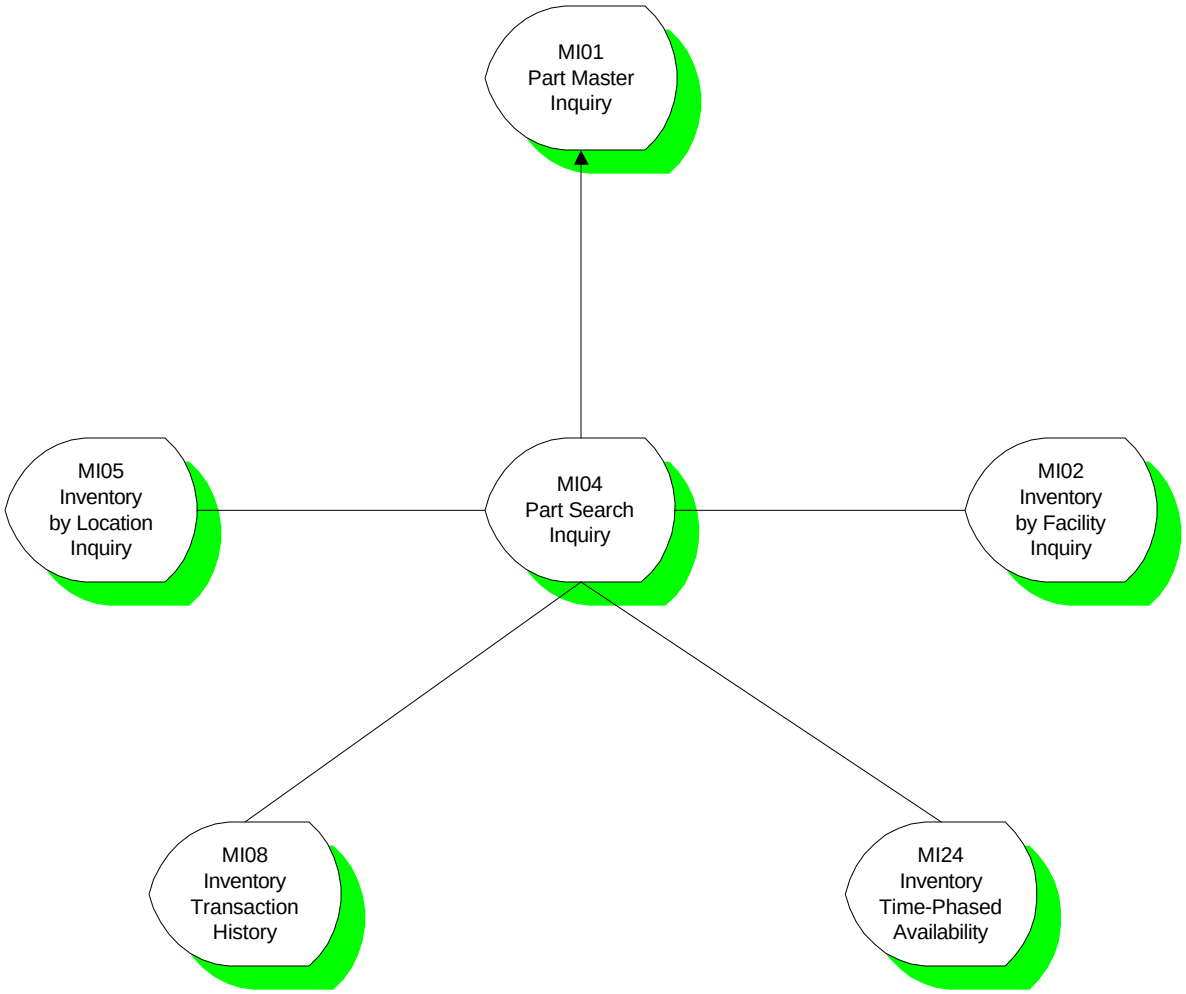
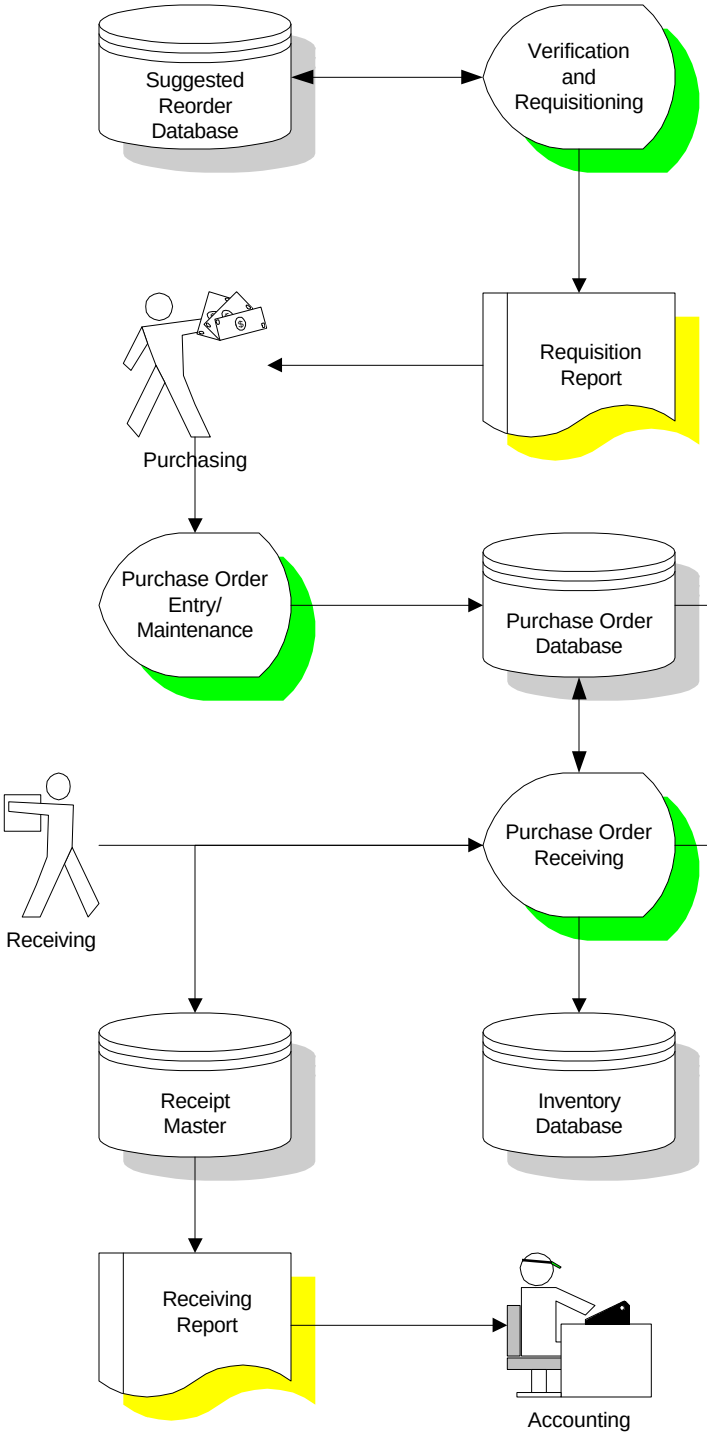


The Inventory support system is designed in such a way that one program acts as the hub for any information that is desired to see. This program allows direct access to many other programs for a specific part and facility that was searched for using MI04. Parts can be searched for by: Catalog#, Noun and Modifier, Manufacturer's Name, Manufacturer's Part Number, or SKU#.

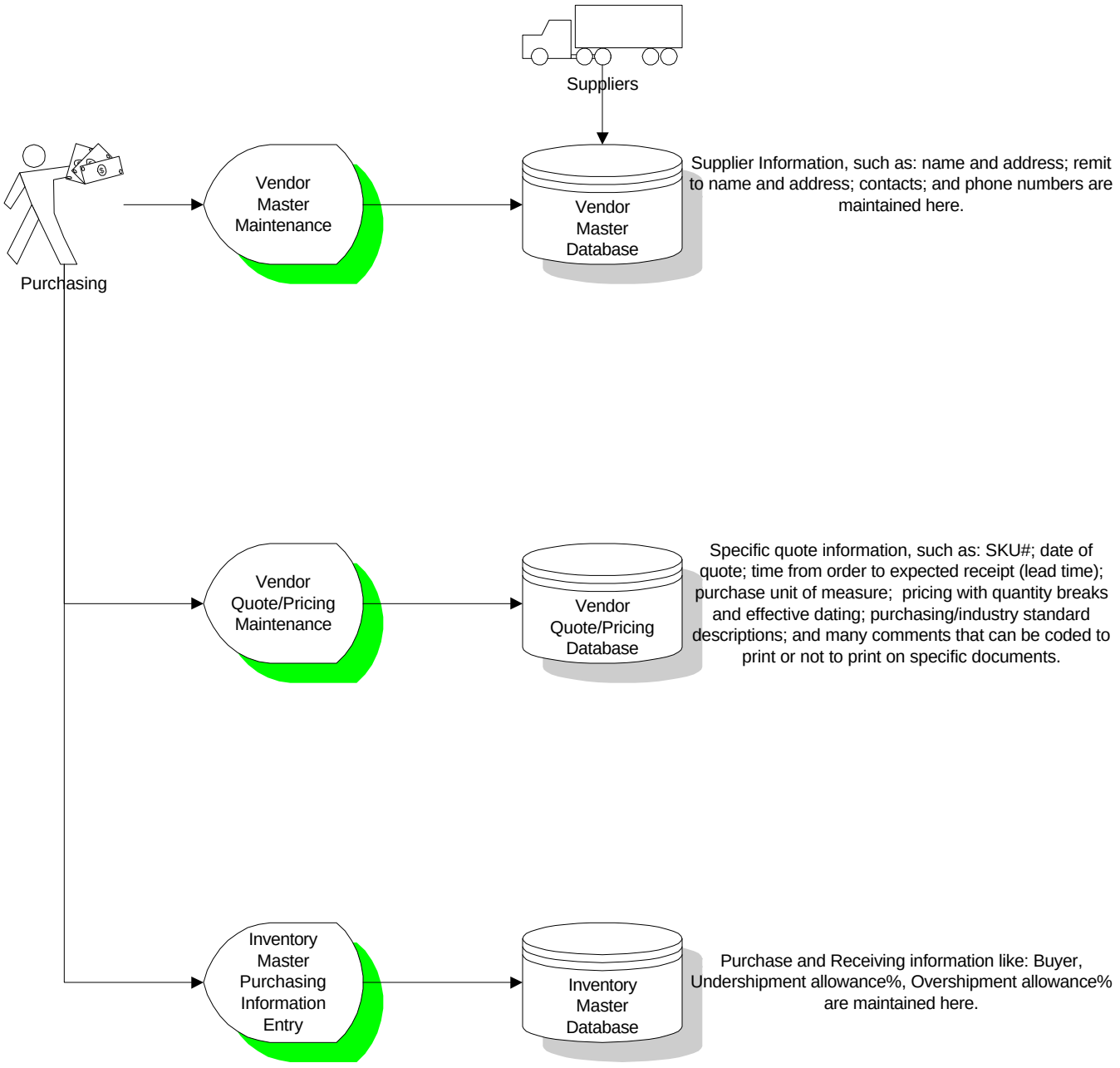
Purchasing System



This process requires the stock room supervisor to review the suggested re-orders on a daily basis for date and/or quantity revisions before selecting the re-order to be requisitioned. The re-order can be converted directly to a requisition order of it's own or tagged for conversion. The tagging process allows the inventory planner to review all re-orders, adjust them and tell the system convert all tagged re-orders at once. The re-order to requisition process will group the re-orders by preferred supplier and place one requisition per supplier. This will make it very easy for the buyer to convert the requisition in it's entirety to a purchase order to your preferred supplier. In either case, a requisition report is printed, and the inventory database reflects the SKU's are on order.

Receiving may be done in one or two steps depending on the inspection policy of the SKU# at this facility. Vendor-to-Stock, or Vendor-to-Inspection and Inspection-to-Stock. The receiving function from the vendor will automatically close the purchase item if within receiving limits established for the SKU# at this facility. Those Purchase Orders that do not close automatically will be reported back to purchasing for review.

Purchasing System Setup



Purchasing System Support