

# Work Clearance Management

Enhancement Package 5 for SAP ERP 6.0



## Latest News from Development

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**WCM Focus Group, April 2010**

Tampa, Florida

**SAP-CENTRIC EAM**  
Inspiring Individuals – Empowering Enterprises



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- **Enhancement Package 5 for SAP ERP 6.0**

Not just any old enhancement package - we want to present the new functions that can help you fundamentally improve your processes.

Looking forward to finding out the latest news from development?

# New Process Stepwise Tagging



- Instead of creating several WC documents, you can also **group items** in a WC document **for switching**. This grouping is called an operational step. We distinguish between the following operational steps:
  - Operational step for tagging
  - Operational step for untagging
- The progress in the operational cycle is also displayed for each individual operational step.
- When you process an operational step, status PROC (Processing) is set automatically. As soon as you have completed processing, status PROC (Processing) is revoked automatically.
- You can also assign operational steps to a WCM-relevant operation.

# New Process Work Permit Management



- By using work permits, you can make sure that safety measures for carrying out certain work are complied with, and safety barriers are not taken out of service unless compensating measures are put in place.
- The work permit is an **operational safety barrier** to **protect against undesired incidents**.
- A work permit is a written document that **authorizes** specified persons **to carry out specified work at a specified time**.
- It **describes** both the **work** to be carried out and the **requirements**, that must be fulfilled.
- Work permits are **categorized in different levels**, depending on risk considerations and the need for coordination.
- A work permit can be created for a WCM-relevant order or for one or more operations.

# Example: The Oil & Gas Industry Distinguishes Between Two Levels of Work Permits



## ■ Work Permits of Level 1

Work permits of level 1 are used for work that involves high risks and hazards. This work requires a comprehensive safety and approval process. It includes hot work, work in an area with special entry restrictions, and so on.

Level 1 work permits are usually valid for only one working shift. An extension of the work permit is only possible under certain conditions (for example, 4 hours). Afterwards, the work permit can no longer be extended. If the work is not yet completed at this point in time, a new work permit must be applied for.

## ■ Work Permits of Level 2

Work permits of level 2 are used for all work with lower risks/hazards. This work must also be completed within a predefined time period, although the time period is defined more generously (for example, 14 days).

# New IMG Activity for Applications (WAPIs)

## Define Work



- In this IMG activity you define the settings for work.
- You can use groupings to group work and distribute it to different subscreens.
- Examples
  - Entry to Confined Spaces
  - Isolation and Testing or Bypassing of Safety Systems
  - Work on Hydrocarbon Systems (CmHn)
  - Pressure Testing
  - Work with Hazardous Substances
  - Work with Radioactive Materials,
  - Well Operation/Well Intervention
  - Work with Explosives

# New IMG Activity for Applications (WAPIs)

## Define Requirements



- In this IMG activity you define the settings for requirements.
- You can use groupings to group requirements and distribute them to different subscreens.
- Examples
  - Depressurization
  - Draining/Emptying
  - Cleaning/Hydrocarbon Freeing,
  - Venting/Installation of Extra Ventilation
  - Prevent Release of Oil and Gas in the Work Area
  - Regular Inspection of the Work Area
  - Fire Prevention
  - Set Up Barriers and Safety Signs
  - PA Announcements

# New Function for all WCM Objects

## View Profiles for WCM Objects



- You can use a view profile to **set up the entire header data screen of a WCM object according to individual criteria.**
- You can perform the following activities in Customizing for WCM:
  - Define view profiles (to set up an individual header data screen)
  - Assign view profiles (per WCM object)
- A number of subscreens are available for setting up individual header data screens:
  - Many data screens with related fields
  - Six tabstrips with tabs that you can define as you choose
- You can position a tabstrip in the position you choose on the header data screen. The use of tabstrips is optional.
- You can position a data screen in two ways:
  - Position it in the position you choose on the header data screen
  - Position it in the position you choose on any tab

# New Business Add-Ins

## BAdIs to Extend the List Processing



- BAdI: List Editing for Work Approvals (WAPs)
- BAdI: List Editing for Applications (WAPIs)
- BAdI: List Editing for Work Clearance Documents (WCDs)
- BAdI: List Editing for Operational Lists (Tagging-/Untagging Lists)
- BAdI: Selection of Work Clearance Documents
- BAdI: List Editing for Lineups
- BAdI: List Editing for Work Permits
- BAdI: Assignment of Orders
- BAdI: Assignment of Work Approvals
- BAdI: Assignment of Applications
- BAdI: Assignment of Operational WCDs
- BAdI: Multilevel List Editing

# New Business Add-Ins

## BAdIs to Extend the Menu for List Processing



- BAdI: List Editing for Work Approvals
- BAdI: List Editing for Applications
- BAdI: List Editing for Work Clearance Documents
- BAdI: List Editing for Operational Lists
- BAdI: Selection of Work Clearance Documents
- BAdI: List Editing for Lineups
- BAdI: List Editing for Work Permit
- BAdI: Assignment of Orders
- BAdI: Assignment of Work Approvals
- BAdI: Assignment of Applications
- BAdI: Assignment of Operational WCDs
- BAdI: Multilevel List Editing

# New Features for the Use of Applications (WAPIs)



- **Offset in Days**

You can shift the start of an application's validity. You therefore have the option of creating the applications earlier.

- **Validity of WCM Object in Hours / Validity Extension in Hours**

You define both the duration of the validity and the extension of the validity.

- **Maximum Extension of Validity in Hours**

You also decide on the maximum extension for an application.

See slide “Features for the Approvals – Block Issuing of Approvals”.

# New Features for the Approvals

## Automatic Assignments of Approvals



You can determine that approvals are assigned automatically when the status PREP (Prepared) is set for a WCM object.

- **Approval determination from a reference object:**

For example, if you know that approval A is always needed for reference object Y, you can define in Customizing that approval A is assigned automatically to WCM objects with reference object Y when you set status PREP (Prepared) for the WCM object.

- **Approval determination from operational steps:**

(Only for Operational WCDs)

For example, if you know that approvals A and B are always used for operational step X, you can define in Customizing that approvals A and B are assigned automatically when the status PREP (Prepared) is set for an Operational WCD with operational step X.

# New Features for the Approvals

## Automatic Assignments of Approvals



- **Approval determination from work or requirements:**  
(Only for Operational WCDs)

For example, if you know that approval A is always needed for requirement Z, you can define in Customizing that approval A is assigned automatically to applications with requirement Z when you set status PREP (Prepared) for the application.

### If this is not sufficient yet!

- **Business Add-Ins BADI\_WCM\_APPROVAL**

You can use the method `AUTOMATIC_ASSIGNMENT` to automatically assign approvals to a WCM object.

## New Features for the Approvals Block Issuing of Approvals



- New IMG Activity – Define Depending on Validity
- In this IMG activity, you make the settings with which you can couple the issuing of approvals to the validity of WCM objects. This means that the issuing of these approvals is only possible if the WCM object is valid.

# Enhanced IMG Activity Application Profile



## Processing Rule for Automatic Creation of WCM Object

- Defines whether a WCM object for a WCM-relevant order is created automatically **on saving**.
- You can also define whether the WCM object is to be **prepared** immediately.

## New Features for Tag Sharing (Lockout/Tagout)



- The system logs the tag sharing in a history.
- **Multiple Use of Tags**  
You also define whether a tag that is no longer needed on site is discarded, so that the system must delete the reference in the WC document.
- **Multiple Use of Test Tags**  
You also define whether a test tag that is no longer needed on site is discarded, so that the system must delete the reference in the WC document.

# New IMG Activity Settings for WCM-Relevant Operations



- In this IMG activity you define the settings for WCM-relevant operations.
- You can assign both a WC document and an approval group to a WCM-relevant operation.

## New IMG Activity

### Do Not Display Dialog Box for Assignments



- In this IMG activity you define whether the dialog box for assignment is displayed.
- If you work with work permits, we recommend that you hide the dialog box for assigning work approvals.

# Questions and Answers




PM-WCM is a component of SAP ERP



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