Create Work Order Against Installation Equipment
Functional Overview
Ellipse EAM® 8.3
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Definitions, Acronyms and Abbreviations

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<th>Definition</th>
<th>Description</th>
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<tr>
<td>MST</td>
<td>Maintenance Schedule Task</td>
</tr>
<tr>
<td>MWP</td>
<td>Mincom Work Planner</td>
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<tr>
<td>Fitted equipment</td>
<td>An item of equipment that is currently fitted to another item of equipment.</td>
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<tr>
<td>Installation equipment</td>
<td>An item of equipment that has another item of equipment currently fitted to it.</td>
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Introduction

When recording condition monitoring measurements for ‘fitted’ equipment that trigger an alarm, Alarm Work Orders can be created for the equipment the measurement was recorded against. Under these circumstances, the Alarm Work Orders would be created against the fitted equipment. However, Mincom Work Planner (MWP) cannot locate work orders below the installation equipment within an equipment tracing structure when scheduling by asset.

In order to support scheduling of work in MWP, Ellipse can now be configured to create Alarm Work Orders against the installation equipment, instead of the equipment the measurement was recorded against.

The purpose of this document is to detail the setup requirements to configure Ellipse to create Alarm Work Orders against the installation equipment, and to demonstrate how this functionality works.

Scope

The scope of this functionality is contained within the following modules, and is available from Ellipse 8.3 onwards:

- 3340 – Condition Monitoring
- 3620 – Work Orders
- 3610 – Equipment Group Identifier

Audience

The intended audience of this document includes business users, the relevant Ventyx managers, functional and technical consultants.

Security

Standard Ellipse security applies.

Business Rules

Installation position without an equipment number

If the installation position does not have an equipment number, the work order will be created against the fitted equipment (current functionality).
Installation equipment without EGI

If the installation equipment’s record does not have an EGI, the work order will be created against the fitted equipment (current functionality).

EGI on equipment

The equipment record for the installation equipment will be checked in order to determine the EGI. The ‘Alarm WO for Installation Equipment’ flag on the EGI will then determine whether the work order will be raised against the installation equipment or the fitted equipment.

Rotable indicator 3 at installation position

If the installation position has a rotatable indicator of ‘3’ (no equipment number allowed), the work order will be created against the fitted equipment (current functionality).

Fitted equipment under warranty

If the fitted equipment is still under warranty, the work order will be created against the fitted equipment and not against the installation equipment (current functionality).

EGI profiles

This functionality only applies to EGI profiles in MSO610. It does not apply to equipment profiles.

Functional Overview

How It Works

When recording condition monitoring measurements for a fitted equipment, and the measurement exceeds an alarm level (either a caution or a danger alarm), the Alarm Work Order will be created against the equipment being monitored (fitted equipment) as default. Alarm Work Orders can be created in any one of three ways:

- Selecting the Action from the alarm measurement in MSE345
- Running MSB340, or
- Using MSO348.

A new flag, ‘Alarm WO for Installation Equipment’ has been added to the Modify Equipment Group Identifier screen (msm610B). As default, this flag is set to ‘N’. To have the system create an Alarm Work Order against the installation equipment, this flag must be set to ‘Y’. When creating Alarm Work Orders for fitted equipment, the system will find the EGI of the installation equipment from its equipment record and check the ‘Alarm WO for Installation Equipment’ flag. If this is set to ‘Y’, the Alarm Work Order will be raised against the installation equipment, instead of the fitted equipment.
Graphical Representation
System Setup

MSO610
Maintain Equipment Group
Identifier

Create WO against

Set 'Alarm WO for Installation Equipment' to 'Y'

Set 'Alarm WO for Installation Equipment' to 'N'
Create Alarm Work Order

- Run MSE345
  Update Condition Monitoring Measurements
- Select un-actioned alarm
- Select option - Create Alarm Work Order

- Run MSB340
  Process Alarm Measurements
- Select un-actioned alarm

- Run MSO346
  Process Alarm Measurements
- Select un-actioned alarm
- Select option - Create Alarm Work Order

Is alarm against Fitted Equipment?

- N
  Fitted equipment still under warranty?
  - Y
  Installation Equipment Number exists?
    - N
    - EGI on Installation Equipment?
      - N
      - Create WO for equipment on the alarm
    - Y
    - EGI - Alarm WO for Installation Equipment?
      - N
      - Create WO for installation Equipment
    - Y

**Current functionality will be performed if the:
- alarm is not against fitted equipment
- fitted equipment is still under warranty
- installation position does not have an equipment number
- installation equipment does not have an EGI – in these circumstances, a WO will be created against the equipment on the alarm
Delete Alarm Work Order

Example – Creating Alarm Work Order against installation equipment

As default, when a condition monitoring measurement triggers an alarm for fitted equipment and an Alarm Work Order is created, the work order is created against the equipment the measurement was created against, i.e. the fitted equipment.

In this example, the EGI profile used identifies the components of a haul truck, being a power transmission and an engine with sub components. The component of interest is the turbocharger, which is fitted to the engine as shown in the screen print below.

To enable the system to create an Alarm Work Order against the installation equipment instead of the equipment the measurement was recorded against, the Alarm WO for Installation Equipment flag on the EGI of the installation equipment (the engine) must be changed to ‘Y’ as shown in the screen print below.
Condition monitoring measurements have been recorded against the turbocharger. The latest measurement value has exceeded the safe operating temperature for the turbocharger and has triggered a danger alarm. An Alarm Work Order has been created against the measurement as shown in the screen print below.

As can be seen in the work order details below, the work order was created against the installation equipment, not the fitted equipment.