

Permits (PM-EQM-SF-PMT)



HELP.PMEQMSFPMT

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Permits (PM-EQM-SF-PMT)

Definition

Agreement required depending on setting before an order may be released or technically completed.

Permit Status:	Condition:
<i>Created</i>	The permit has been created as a master record.
<i>Deleted</i>	The master record for the permit has been deleted.
<i>Assigned</i>	The permit has been assigned to either a technical object or an order.
<i>Not relevant</i>	The assignment of the permit to a technical object or order is currently not effective.
<i>Issued</i>	The permit has been issued by an employee responsible for it.
<i>Canceled</i>	The permit was canceled by an employee, after it had already been issued.

Use

You can use permits to ensure that special approval must be obtained before orders are executed.

Permits can be assigned to the following objects:

- Technical objects – functional locations and equipment
- Orders

Structure

Permits can cover the following areas:

- The way the order is executed or the safety aspects involved
 - Safety precautions for the employees and surroundings: Providing ear protection for employees or acidproof equipment, safeguarding the work area, installing a flame-proof zone, work clearance certificate
- How the execution of an order is organized
 - Budget guarantee, approval of plant manager

It is therefore advisable to group permits into permit categories, for example, safety permits or work permits.

Working with Permits

Working with Permits

Purpose

This process describes the use of permits during order processing. Before an order can be executed or technically completed, a planner ensures that:

- All the necessary safety precautions have been taken
- The required financial resources are available
- The work has been approved at management level

Prerequisites

You define permit categories in the Customizing for *Plant Maintenance and Customer Service* by choosing *Master Data in Plant Maintenance and Customer Service* → *Basic Settings* → *Permits* → *Define Permit Categories*.

Employees who need to issue and cancel permits must obtain the appropriate authorization for this. For more information, see [BC - Users and Authorizations \[Ext.\]](#).



Any employee, who is authorized to change orders or technical objects, can assign permits to an order or technical object.



Employee A has obtained authorization to edit general data for an order or technical object. When changing the order or technical object, employee A can assign permits to it or change existing assignments. This employee can also issue and cancel permits.

Employee B has obtained authorization to edit general data for an order or technical object. When changing the order or technical object, employee B can assign permits to it or change existing assignments. However, this employee cannot issue or cancel permits.

Employee C has only obtained authorization to issue or cancel permits. They cannot change the general data for the order or technical object. In addition, employee C cannot assign permits or change permit assignments. This employee must issue or cancel permits directly from the list of permits.

Process Flow

1. You define permit categories in Customizing.
2. You create permits as master data in the system.
 - These can be based on safety advice from the manufacturer of a technical object, general legal regulations on safety in the workplace or fixed company rules.
3. You can create authorizations for issuing and canceling permits in the system.
4. You assign permits to a technical object if these permits could be relevant (now or later) for an order on an object.

Working with Permits

If a permit should be valid for each order on a particular technical object or its subordinate objects, then the indicator *Proposal* can be set when assigning this permit to the technical object. The permit is then always assigned to all the orders.

You can edit or delete the assignment of permits to technical objects at any time.

5. You create an order. If permits have already been assigned to the reference object for the order or the subordinate objects, and these assignments marked with indicator *Proposal*, these are also automatically referred to the order.

In addition, classified permits can also have been assigned automatically to the order.

However, you can assign permits manually to the order. To do this, you can use the default values supplied by the structure for the technical object.

You can then only delete the assignment of permits to an order if the assignment was performed manually. If the assignment was made automatically, only the indicator *Not relevant* can be set.

6. You issue the permits in the order. To do this, you have the following options:
 - You print the permit papers. The employee responsible signs these and issues the necessary permits. An employee subsequently enters who issued the permits and when.

The printing of permit papers is integrated in the printing of order papers. For more information, see [Printing and Faxing of Shop Papers \[Ext.\]](#).
 - As the employee responsible, you can either issue the permits directly in the system when changing the order or by using the permit list.
Depending on which indicator you have set in the permit master record, the permits must have been issued before the order is released or before the technical completion.
Permits do not affect the order status.
7. Issued permits can be canceled in the following cases:
 - The permit must be issued before the order is released, but the order has not yet been released.
 - The permit must be issued before the order is technically completed, but the order has not yet been technically completed.
8. The order can be executed.
9. At this point, you can use specific selection criteria to create a list of permits. A traffic light display helps you to assess the urgency of reprocessing a particular permit.

Creating, Changing and Deleting a Permit as Master Data

Creating, Changing and Deleting a Permit as Master Data

Creating a Permit

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Management of technical objects / Maintenance processing* → *Environment* → *Permits*
 - *Logistics* → *Customer service* → *Management of technical objects / Service processing* → *Environment* → *Permits*

The overview of all the permits appears.

- Choose *New entries*.
- For each permit, specify a permit category.
- To create a long text, choose *Long text*.
- If the permit should be determined using class selection, enter a permit class and choose the classification detail screen. Enter the characteristic values, which should be used to determine the permit.
- Specify the following information:
 - When the permit should be issued
 - Whether the permit papers should be printed
 - If the specifications may be changed
 - Whether the use of this permit should be locked
- Save the permit.

Changing a Permit

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Management of technical objects / Maintenance processing* → *Environment* → *Permits*
 - *Logistics* → *Customer service* → *Management of technical objects / Service processing* → *Environment* → *Permits*

The overview of all the permits appears.

2. Select the required permit and choose *Details*.
3. Make changes as required and save the permit.

Deleting a Permit

1. Depending on the application component in which you are working, choose one of the following menu paths:

Creating, Changing and Deleting a Permit as Master Data

- *Logistics* → *Plant maintenance* → *Management of technical objects / Maintenance processing* → *Environment* → *Permits*
- *Logistics* → *Customer service* → *Management of technical objects / Service processing* → *Environment* → *Permits*

The overview of all the permits appears.

2. Select the permit to be deleted and choose *Delete*.

One of the following scenarios will occur:

- If the permit has not yet been used, its master record is deleted. It can no longer be viewed in the overview.
- If the permit has already been assigned to a technical object or an order, it cannot be deleted. However, it is no longer ready for input in the overview.

Return to the overview of all the permits.

You now have the following options:

- To ensure that a particular permit cannot be assigned to a technical object or order in future, call up the detail screen for this permit and set the indicator *Usage lock*.
- To see the objects, to which a permit is still assigned, choose *Where-used list*. You can then delete the existing assignments and even the permit itself.

3. Return to the overview of all the permits and save your entries.

Assignment of Permits

Assignment of Permits

Use

You can assign permits to the following objects in the system:

- Technical objects – functional locations and equipment
- Orders

You can also cancel the assignment of permits, but not in all cases. For more information, see [Changing and Canceling an Assignment of Permits to the Order \[Page 18\]](#).

Features

Assignment to a Technical Object

It is not obligatory to assign permits to a technical object. However, it does provide the following advantages:

- If a permit should be assigned manually in the order, the assignments from the master record for the technical object, which is the reference object for the order, can be proposed. This ensures that only those permits relevant for the reference object are proposed.
- When assigning a permit to a technical object, you can set the indicator *Proposal*. When creating an order with this technical object or a subordinate object as the reference object, the permit is automatically copied into the order.



Permits in an object hierarchy:

In clarification plant C1, there is a pumping station C1-B01, in which a pump C1-B01-1 is installed.

Ear protection is a normal requirement for work in the pumping station. The permit **Ear protection** was created and assigned to functional location C1-B01.

A welding permit is required for welding work on the pump. The permit **Welding permit** was created and assigned to functional location C1-B01-1.

In an order for the pump, ear protection for pumping station C1-B01 and welding permit for pump C1-B01-1 are proposed by the system, since functional location C1-B01 is superior to functional location C1-B01-1.

If the indicator *Proposal* was set when the permits **Ear protection** and **Welding permit** were assigned to the respective functional locations, the corresponding permit is automatically copied into the order.

Assignment to an Order

Permits can be:

- Assigned **manually**
- Calculated **automatically** by the system **using class selection** and then assigned

For this, the permits in your system must:

Assignment of Permits

- Belong to a permit group, to which a class of class type 049 has been assigned
- Have been classified using the class characteristics
The system automatically determines these permits. It compares the order data with the characteristic features of the classified permits available in the system. Permits, for which the data matches, are assigned automatically to the order.

If you change the order data and then call up the permits again, the system repeats the class selection. It changes the permit entries for the order if required and records this in the **log**. You can call up the log in the order by choosing *Goto* → *Logs* → *Permit determination*. All of the system messages, which occur whilst the permits are being determined using classification, are logged here.

For more information, see [CA - Class System \[Ext.\]](#).



Examples of class selection of permits:

The permit **Approve modification costs** is part of a permit group, to which a class of class type 049 is assigned. The class is classified using the *Maintenance activity type* characteristic with the feature 001 (= modification).

A planner creates an order. They enter maintenance activity type 001 in the order header and call up the permits.

The system determines an agreement between the order data (*maintenance activity type 001*) and the characteristic feature of the classified permit **Approve modification costs**, and assigns this permit automatically to the order.

If the planner does not call up the permits, the required permits are determined automatically when the order is released or technically completed.

Assigning Permits

Assigning Permits

Assigning a Permit to a Technical Object

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Customer service* → *Management of technical objects* → *Functional location / Equipment* → *Change*
 - *Logistics* → *Plant maintenance* → *Management of technical objects* → *Functional location / Equipment* → *Change*
2. Choose *Extras* → *Permits*.

The screen for assigning permits appears. Permits may already be assigned here.
3. Enter data as required.
4. If you want to enter a long text for the assignment of a permit, select the required permit and choose *Long text*.

The long text entry appears. If a long text was entered when the permit was created, this is also copied into the long text for the permit assignment.

Enter the required text, save it and return to the dialog box for assigning permits. The indicator *Long text* is now set for the edited permit.
5. Save the technical object.

Assigning a Permit to an Order

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Maintenance processing* → *Order* → *Change*
 - *Logistics* → *Customer service* → *Service processing* → *Order* → *Service order* → *Change*
2. Choose *Goto* → *Permits*.

The screen for assigning permits appears.
Permits may already be entered here, proposed from the object structure or determined using class selection.
3. Enter data as required.
4. To enter additional permits, which have been assigned to another technical object from the object structure, proceed as follows:

Choose *Proposals*.

You see a multi-level object list with the correspondingly assigned permits.

Select the required permits and copy them to the permit list in the order.



You cannot assign permits to the same order more than once.

Assigning Permits

Permits, which must be issued before the release or the technical completion of the order, can no longer be assigned if the order has already been released or technically completed.

Choose *Continue*.

5. Save the order.

For more information about canceling permits, see [Canceling the Assignment of Permits \[Page 18\]](#).

Displaying a Permit List

Displaying a Permit List

- Depending on the application component in which you are working, choose one of the following menu paths:
 - Logistics* → *Plant maintenance* → *Maintenance processing* → *Order* → *Permit list* → *Display*
 - Logistics* → *Customer service* → *Service processing* → *Order* → *Service order* → *Permit list* → *Display*

A selection screen appears.

- Enter data as required.

Specifying the duration until the key date is necessary for using the traffic light display in the results list to see how urgently which permits should be issued until this date.

- Choose *Execute*.

The list of permits appears.

The traffic light colors signify the following:

Traffic Light Color	Meaning
Green	The permit was issued on time.
Yellow	The permit has not yet been issued, although its issue is: <ul style="list-style-type: none"> - Necessary for release and the basic start date is not yet past and occurs before the key date - Recommended for release and the basic start date is before the key date - Necessary for completion and the basic end date is not yet past and occurs before the key date - Recommended for completion and the basic end date is before the key date
Red	The permit has not been issued, although its issue is: <ul style="list-style-type: none"> - Necessary for release and the basic start date is already past - Necessary for completion and the basic end date is already past
<None>	The permit does not need to be issued (yet).

- To display more detail data for the order to which a permit is assigned than just the order number, choose *Display order*.

For more information, see [Entering, Issuing and Canceling a Permit \[Page 20\]](#).

Changing an Assignment of Permits

Changing an Assignment of Permits

Prerequisites

You require authorization to assign permits and to change orders overall.

Procedure

Changing an Assignment of Permits to a Technical Object

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Management of technical objects* → *Functional location / Equipment* → *Change*
 - *Logistics* → *Customer service* → *Management of technical objects* → *Functional location / Equipment* → *Change*
2. Enter the number of the functional location or equipment, whose assignment to a permit you want to remove and choose *Continue*.

The master data screen for the technical object appears.
3. Choose *Extras* → *Permits*.

A dialog box appears in which you see all the existing permit assignments to this technical object.
4. Make changes as required.
5. Choose *Continue* to return to the master data screen.

Your entries are saved.

Changing an Assignment of Permits to the Order

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Maintenance processing* → *Order* → *Change*
 - *Logistics* → *Customer service* → *Service processing* → *Order* → *Service order* → *Change*
2. Enter the number of the order, whose assignment to a permit you want to change, and choose *Continue*.

The header data screen for the order appears.
3. Choose *Goto* → *Permits*.

A dialog box appears, in which you can change and cancel the assignments.
4. Make changes as required.
5. Choose *Continue*.

Your changes are saved, and you return to the header data screen for the order.

Canceling an Assignment of Permits

Canceling an Assignment of Permits

Prerequisites

You require authorization to assign permits and to change orders overall.

Procedure

Canceling an Assignment of Permits to a Technical Object

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Management of technical objects* → *Functional location / Equipment* → *Change*
 - *Logistics* → *Customer service* → *Management of technical objects* → *Functional location / Equipment* → *Change*

2. Enter the number of the functional location or equipment, whose assignment to a permit you want to remove, and choose *Continue*.

The master data screen for the technical object appears.

3. Choose *Extras* → *Permits*.

A dialog box appears in which you see all the existing permit assignments to this technical object.

4. Select the permits, whose assignment you want to cancel, and choose *Delete*.
5. Choose *Continue* to return to the master data screen.

Your entries are saved.

Canceling an Assignment of Permits to the Order



You can no longer cancel assignments for permits that have been:

- Issued already
- Copied from the proposals from the object structure
- Determined automatically using classification

These permits would be reassigned during the next check. To prevent them being assigned, you can set the indicator *Not relevant*. Under certain circumstances, this can also be set and changed by the system.



The indicator *Not relevant*:

You have created the permit *Budget check*. This has been classified so that it only needs to be issued if the budget exceeds \$ 2,000. Should the budget fall below the \$ 2,000 mark, the indicator *Not relevant* is automatically set for this permit by the

Canceling an Assignment of Permits

system. However, a planner with the requisite authorization can reset the indicator manually.

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Maintenance processing* → *Order* → *Change*
 - *Logistics* → *Customer service* → *Service processing* → *Order* → *Service order* → *Change*
2. Enter the number of the order, whose assignment to a permit you want to cancel, and choose *Continue*.

The header data screen for the order appears.

3. Choose *Goto* → *Permits*.

A dialog box appears, in which you can change and cancel the assignments.

4. Select the permit, whose assignment you want to cancel, and choose *Delete*.
5. Choose *Continue*.

The header data screen for the order reappears. The deleted assignment is canceled and the new status is saved.

Entering, Issuing and Canceling a Permit

Entering, Issuing and Canceling a Permit

Prerequisites

You require one of the following authorizations:

- Authorization to change orders
When **changing the order**, you can enter, issue and cancel permits.
- Authorization to issue and cancel permits
You can only enter, issue and cancel permits using the **permit list**.



You can only cancel issued permits if the order has not been:

- Released and the permit must be issued when the order is released
- Completed and the permit must be issued for when the order is technically completed

You can **reissue** a **canceled** permit later.

For more information, see [Displaying a Permit List \[Page 14\]](#).

Procedure

When Changing the Order

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Maintenance processing* → *Order* → *Change*
 - *Logistics* → *Customer service* → *Service processing* → *Order* → *Service order* → *Change*
2. Enter the number of the order, in which you want to issue permits, and choose *Continue*.
The header data screen for the order appears.
3. Choose *Goto* → *Permits*.
The system displays a dialog box with all the permits valid for the order.
You can assign additional permits if required, as described in [Assigning Permits \[Page 12\]](#).
4. Select the permit that you want to edit.
5. Now choose one of the following options:
 - To **state** that **someone else** is issuing the permit, enter their name and yours in the corresponding columns.
Save your entries or choose the *Issue permit* pushbutton.
The permits are issued.
 - To **issue** the permit **yourself**, choose *Issue permit*.

Entering, Issuing and Canceling a Permit

- To cancel the permit, choose *Cancel permit*.

The system cancels the issue data in the corresponding fields. The permit needs to be issued again.

Depending on the permit attributes and the system status of the order, the reissue can be refused.

The system writes the relevant data to the appropriate fields.

6. Save the order.

From the Permit List

1. Depending on the application component in which you are working, choose one of the following menu paths:
 - *Logistics* → *Plant maintenance* → *Maintenance processing* → *Order* → *Permit list* → *Change*
 - *Logistics* → *Customer service* → *Service processing* → *Order* → *Service order* → *Permit list* → *Change*

A selection screen appears.

2. Enter data as required.

Specifying the duration until the key date is necessary to see which permits should be issued until this date.

3. Choose *Execute*.

The list of permits appears. The urgency of issuing permits is represented using a traffic light display.

4. Select the permit that you want to edit.

5. Now choose one of the following options:

- To **state** that **someone else** is issuing the permit, enter their name and yours in the corresponding columns.

Save your entries or choose the *Issue permit* pushbutton.

The permits are issued.

- To **issue** the permit **yourself**, choose *Issue permit*.

- To **cancel** the permit, choose *Cancel permit*.

The system cancels the issue data in the corresponding fields. The permit needs to be issued again.

Depending on the permit attributes and the system status of the order, the reissue can be refused.

The system writes the relevant data to the appropriate fields.

6. Choose *Back*.

The selection screen reappears.

Entering, Issuing and Canceling a Permit