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Work Flow Analysis Report

Consisting of: Work Management, Preventative Maintenance, Materials & Equipment

T. L. Jennings

Lockheed Martin Hanford Company, Richland, WA 99352
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Abstract: The Work Flow Analysis Report will be used to facilitate the requirements for implementing the Work Control module of Passport. The report consists of workflow integration processes for Work Management, Preventative Maintenance, and Materials and Equipment. This document contains the workflow requirements for the Passport system prior to production release.

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RPP-5510

**Work Flow Analysis Report
Consisting of: Work Management,
Preventative Maintenance,
Materials & Equipment**

Date 12/13/99

RPP-5510

Revision 1.0

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RPP Work Management

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Section 1 - Description of WFAR Sections

Overview

The Work Flow Analysis Report (WFAR) is intended to clearly identify and segregate findings from the BPI sessions. The intention behind the creation of this document is to facilitate information exchange between other projects and different phases and activities within this project. The Work Flow Analysis Report will be used as the basis for creating or modifying procedures. It is not intended to include definitive lists of future tasks or to be interpreted as a procedure.

The following is a description of each section of the Work Flow Analysis Report document:

1 Description of Document Sections

Brief descriptions of the content and format of each section.

2 Executive Summary

A. Introduction

A description of the project background and the context in which the Business Process Improvement Session was performed.

B. Business Process Improvement (BPI) Description

A description of the purpose for performing the Business Process Improvement study, as well as a description of the activities performed specifically for the RPP Work Control project to achieve the results.

C. Verification of Project Scope

The original project scope and notes about what was

found to be achievable during the BPI sessions.

D. Overview of New RPP Business Processes

Work Flow diagrams, analysis and comments showing the new RPP work processes at a management summary level (Level 0).

E. Summary of Projected Major Benefits

An itemized list of major qualitative benefits derived from the project and the new system.

3 Work Flow Analysis

A. Work Flows

Level 2 Work Flow diagrams and narratives. This section will make up the majority of the Work Flow Analysis Document.

B. Reporting Analysis

A listing reports in the Work Management Module and on-line inquiries, including planned usage.

4 Application Analysis

A. Major Data Structures and PASSPORT Settings

A general description of how PassPort®¹ will be set up for usage at RPP, including system preferences, *major* data usage requirements (such as facilities, cost centers), user settings, user parameters (approval limit policies, security policies) and tailoring decisions.

¹ PassPort is a registered trademark of Indus International.

The content of this section is not intended to capture all data requirements and decisions. Instead it is designed as a point of reference for data decisions made within the scope of the BPI process. It reflects the nature and general structure or format of the data. Example: The Equipment Hierarchy. It would be impractical to capture all the data needed to populate the system, but decisions affecting the structure of this data are an outcome of the BPI review and are documented here.

5 Glossary of Terms

As the BPI session progressed, the team settled on common terms to refer to processes and items within PassPort. Those terms have been captured here for future reference.

Appendix

Reading IDEFO Documentation. A brief tutorial on IDEFO data flow diagrams, including examples. IDEFO is used throughout this document to describe the work flow processes.

Section 2 - Executive Summary

Introduction

Business Process Improvement (BPI) Description

The BPI process is a methodical approach to:

- ☐ ascertaining business processes and methods currently used within RPP for each function,
- ☐ coupling that with functionality available within PassPort,
- ☐ discerning which method is most appropriate in each case,
- ☐ and documenting the result.

Within this process the users drive and participate in the selection and application of the work processes to their business model.

The methods selected are documented as Work Flow diagrams accompanied by descriptive narratives, screen snapshots and other commentary. These Work Flows capture the conceptual agreements between all parties concerned as to how specific processes are executed. The Work Flows are then tested against PassPort and documented. This document defines how PassPort is to be used, by whom, to a panel/screen or keystroke level. The level of detail documented in this process has been prescribed by the users concerned.

The Work Flow Analysis is Followed by:

- ☐ A comprehensive list of procedures to be implemented simultaneously with PassPort.
- ☐ A detailed training requirements document.
- ☐ An analysis of expected and supportable benefits resulting from the PassPort implementation.

- ☐ A comprehensive list of interfaces for development (for each phase of the implementation, if required).
- ☐ A detailed outline of data conversion requirements, preferences and settings necessary for RPP-unique PassPort implementation.
- ☐ Detailed software development.
- ☐ Additional report development requirements.

This process serves to highlight the organizational changes that may be required to support the PassPort implementation or that may result from the PassPort implementation. These items also capture any business policy or process which may be required to support operations or strategic initiatives of RPP in the context of the PassPort implementation.

Verification of Project Scope

This BPI was scoped to include all PHMC Work processes. Since RPP was scheduled to be the first to implement the system, the bulk of the effort was focused on RPP and RPP-specific work processes. Major Sub-Contractors (MSCs) from the rest of PHMC were involved in the BPI sessions to the extent necessary to provide both input to the work management process and to assure that decisions made during the work flow definitions would not adversely affect their future implementation of PassPort.

Integration with the newly implemented PassPort/PeopleSoft Business Management System (BMS) was also a major priority during the BPI sessions. Meetings and coordination efforts were held on a continuing basis throughout the BPI sessions. Several task items dealing with BMS integration have been identified and are scheduled to be completed prior to implementation of the Work Management System.

The project was initially scoped to include the following processes:

- ☐ Equipment Data (Hierarchy, Definition, Processes) – attached to a PA due in September, 1999
- ☐ Work Management – Initial definition, scoping and planning for implementation FY 2000
- ☐ Preventative Maintenance – Definition, scoping and Planning for implementation FY 2000
- ☐ Reports – As needed to support the above items.
- ☐ Data Integration concerns with legacy RPP and Site systems, and the new PassPort/PeopleSoft BMS systems.

No additional processes were added to the original scope during the BPI sessions. A first cut at required reports was made, but it was determined that a more full coverage of reporting requirements would be addressed later in order to better align requirements with Work Management and Project Control implementations.

Gaps:

Throughout this document you will see issues listed. During the BPI study, close watch was kept on items that needed to be resolved prior to some milestone in the future. These items were collected and identified as issues, then recorded in the issue tracking database located on HLAN at \\ap001\indus_bpi\Action_log.mdb. They are being worked on a prioritized basis. As the issues are resolved, their resolution is recorded in the body of this document.

Overview of New RPP Business Processes

This BPI study dealt with four (4) major areas of Work Management: Work Management, Preventative Maintenance, Materials, and Equipment Management. The following charts and text describe in summary detail the processes charted for each of these areas during this BPI study.

W100: Work Management (Summary Level)

Overview

This section of the flow shows the summary (overview section) of all other flows in the W100 section.

Gaps

Issues not specific to a sub section of this work process are included in this summary level section.

- Issue #28 Prompt panel from crew/resources may be incorrect. The prompt panel called from the resources panel is D658. It should be x211. D658 prompts only members of the current crew. If you are trying to assign people to the crew, this prompt can't be used.
- The X2xx Panel prompts all resources in the facility
- Issue #60 Commercial Grade Dedication
How does the planner identify that a Commercial Grade Dedication is required?
- Determine how this is handled now.
- Issue #67 Search by less than complete Component ID
Panel M013, Open Work Request
Should be able to search by less than a complete component ID.
- Issue #77 Model Work Order Approval
Selection of a Model Work Order may require less approval than copying a previous corrective maintenance work order. Indus will determine if that is the case.
- Issue #86 Location/type of Procedure files
Locate files used for Proclinfo. Determine how to best make available as links to Work Standards.
- Issue #87 Naming standards for titles
Task titles show on prompt/search panels. Equipment ID should show there to give meaning to the titles. Create naming standards for: Work Request, Work Order, Work order task that include Equipment ID
- Issue #89 Additional fields on Prompt panels

The Equipment/Tag ID doesn't show on prompt panels when looking up W/R and W/O. It makes it harder to determine which of the W/R or W/O you are looking for. Ask Indus about adding Equipment/Tag ID to Prompt panels as appropriate.

- Issue #83 Inspection required field functionality
What is the functionality required by "inspection required"? (On the task detail child Panel)
If the field is "yes" is the QC panel then required to complete planning on a Work order task?
Once the QC preference is turned off, no information should be required on the QC Panel. If inspection required (task Detail) is set to "Y", you can't approve the work order until you enter something in the QC panel. This appears to be a bug in PassPort Temporary Resolution: Change the "Y" to "X" so PassPort doesn't key on this field and require information in the QC panel (this customer does not want the QC Panel to be available).
- Issue #91 Site Resource Codes
What are resource types/codes. Will this support all resource types for the site?
What is the source of the Resource codes and pricing tables for WM?
- Is there an equivalent in PeopleSoft? Does it map to PassPort? Where/how do we get rates into PassPort?
- Issue #92 Integration Process
PassPort / PeopleSoft Integration product – How are the business decisions made to determine process/data mapping for data that both systems require?
- Issue #94 Assign UTC and Catalog IDs for equipment in tool cribs
Will use Panel 7 in tasks (M106).
In order to have this work correctly, all equipment that can be checked out must have UTC and Catalog IDs assigned prior to implementation
- Issue #99 Quality Control Processes
Review the use of Quality Control rather than Peer Review for quality issues.
- Issue #131 Imaging System Requirements

We need to have imaging software and high speed printing capability to effectively use the Document Reference section of PassPort.

- Issue #132 Waiver Required
Preparing work package for approval requires a Waiver to HNF-PRO-233 for approval designator
- Issue #133 Alert Groups (similar to Route Lists)
Define the initial set of alert groups needed for implementation and the individuals assigned to the groups: Quality Control, Operations, Environmental Safety, RadCon, Nuclear Safety, Industrial Safety, Industrial Hygienists, MSDS/HAZMat specialists, Asbestos Clearance, Electrical Engineering (by farm?), Mechanical Engineering (by farm?)
- Issue #134 Determine Route Lists
Each type of work must be routed for approval. The default route list (names, organizations) for each case must be determined and installed in PassPort
- Issue #143 Work Order Attribute Templates (see also #166)
Templates For Work Order Attributes
EWP Team list (kinds of people)
Walk-Down notes
EWP Planning Meeting notes
Post Work Review notes
Work Record (craft & Super daily)
Critique Report
- Issue #163 Report Writer
Need to define what report writing application will be used, how training will be handled and who has access to the system.

Work Flows included in Work Management (W100)

W101: Identify Unplanned Work

The Work Request process will be utilized to identify (and report to Operations) broken or degraded equipment and to report the need for physical work to improve the material condition of facilities. The Work Request provides a validation process which will identify

duplicate Work Requests, verify that the work is funded and allow Operations to evaluate problems to determine if there are required mitigating actions which should be taken.

W105: TBR Work Order Planning

In order to capture cost and schedule information at a level below the CACN / COA level it is possible to create work orders for each activity in a TBR. The Manager responsible for the work associated with a TBR CEIS is responsible to ensure that the TBR Work Order is planned and approved. This also provides a convenient way to identify approved TBR budgets. When PassPort Project Management Cost and Schedule panels are implemented, this process will be revised.

W106: Non-Equipment Work Order Performance

Work Orders written for the performance of Non-Equipment work are generally opened for an extended period of time and are intended to capture the material expenses and labor expended by personnel who perform work on the TBR activities.

W110: Work Planning

Reports of broken or degraded equipment must be reported to Operations to determine if mitigating actions are required. In addition, each Work Request should be validated to ensure that the requested work is funded by ensuring that the work is included in an approved RPP TBR. Once validated, the work request is sent to the planning center. The planning center groups work requests into work orders as appropriate and determines the type of work order planning to occur.

W110.2: Performing Minor Maintenance

A Work Request may result in Minor Maintenance as described by a list of Minor Maintenance activities.. This flow describes the process for completing work that has been designated Minor Maintenance. Minor Maintenance may be requested directly by operations.

RPP Work Management

Section 2- Executive Summary

W110.3: Plan Expedited Work Order

A Work Request may result in an Expedited Work Order. This flow describes the process for planning an Expedited work order. This work must meet specific criteria for performance and consists of a single task.

W110.4: Plan EWP Work Order

A Work Request may result in an Enhanced Work Planning (EWP) Work Order. A Work Order prepared to perform complex or high-hazard work for the first time must be planned using the EWP process. This flow is intended to describe the planning for a work order via the EWP process.

W110.5: Plan Non-EWP Work Order

Work which has been previously planned via the Enhanced Work Planning process or which is of low hazard and complexity need not be processed through the EWP process. These work orders are called non-EWP Work Orders.

W111: Request Clearance from Operations

When the Planner is creating a work order to perform maintenance or modifications to equipment, Locks and Tags (Clearance Orders) may have to be hung to identify the work boundaries and to ensure that the process is de-energized/drained as necessary. This work flow describes the process for notifying the Operations Tagging Authority of the need for a Clearance Order.

W120: Approve Work Order

This work flow describes the process for routing a Work Order for approval and the approval process.

W130: Schedule Tasks

Scheduling of the PassPort Work Order Tasks is performed on Primavera P3. A Download/Upload process is used to update P3 with the daily progress and newly approved Work Order Tasks. This flow describes the process for placing PassPort Work Order Tasks on the Daily Schedule.

W140: Pre-Work Task Activities

After the work is scheduled on the daily schedule. There are several parallel efforts which must be accomplished in order to ensure that a ready to work package is sent to the field in a timely manner on the scheduled date. This work flow describes the activities required to ensure the package is ready to work. Parts and materials are available, the package is printed and assembled, the work is authorized, permits have been approved and tags have been hung as necessary. Activities on this flow may not necessarily happen in the same order as shown on the flow diagram. Many activities are performed in parallel.

W140.5: Job Preparation

This work flow describes the activities that are performed by the worker in preparing to perform the work as described on the scheduled Work Order Task.

W150: AJHA

An important element of the Enhanced Work Planning process is the performance of a Job Hazard Analysis (JHA). The JHA is performed and documented in the Automated Job Hazard Analysis (AJHA) tool. The JHA helps the planner identify work hazards and provides a tool for gathering the work requirements and Permits necessary for the performance of the work. The AJHA tool can be OLE attached to the Work Order Task for convenience of the Planner. Results of the JHA will become an integral part of the Work Order Task plan work instructions and permits

W160: Prepare Clearance Order

During Work Planning, the Planner determined the condition of the equipment needed to perform the work. For instance, to work on a valve in a water system, the limits switches may need to be de-energized, the water drained from the system, the vent valves open, a drain open, air isolated from an air actuator, etc. It is the Planner's responsibility to determine these conditions and inform Operations that a Clearance Order is required. It is Operations responsibility to determine what components to manipulate and tag

to obtain the correct conditions to do the work. The worker will review the tags and perform Authorized Worker Lockout prior to performing the work.

W170: Scheduled Work Performance Activities

This Work flow describes the activities performed by the worker in order to complete the Work Order Task activities.

At this point, the work has been Authorized, a Pre-Job Briefing has been performed, the worker has gathered the necessary equipment and materials, reviewed the work package and is ready to start the work.

Initial Post-Job work and documentation is described. These activities include statusing, clearing the Clearance Order, post work briefing, documentation of the work, recording lessons learned, post work review by the work supervisor and operations and an Enhanced Work Planning review of the completed work.

W180: Complete Work Order

This Flow describes the administrative tasks to complete the work order.

RPP Work Management

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W200 Predefined Parameters (Summary Level) Overview

The following work flows describe the setup of Predefined Parameters, the generation of the PM Work Order Tasks / Work Lists and the management of Work List items. Completion of PM Work Order Tasks is described in the W170 Perform and Document Work Flow.

In addition to the normal corrective and on demand work performed at RPP, there is another category: work performed on a repetitive basis. This work may be preventative maintenance such as lubrication, rebuilds, periodic calibration of equipment, etc. or it may be testing mandated by local, state and federal statute, or it may be any other work that is performed on a periodic, repetitive basis.

This work may require scheduled work packages to ensure the proper resources are available or it may be level-of-effort work that does not require scheduling; only tracking of completion. In either case, a verifiable schedule of frequency and other attributes that describe the repetitive work requirement must be provided. RPP must be able to easily track completions and future due dates for each work item. The Predefined Parameter functionality of PassPort is provided to accomplish this mission.

W210: Preventative Maintenance Requirement

In PassPort, Preventative Maintenance is called "Predefined Parameters". Predefined Parameters are utilized to set up and manage tasks done on a predetermined frequency. This frequency can be based on calendar dates or upon an incremental increase in a reading. Tasks at Hanford that are performed on an predetermined frequency include:

- Functional Testing
- Calibrations
- HP Surveillance
- Surveillance Tests
- Preventative Maintenance
- Ticklers

W220: PM W/O Generation

The Predefined Parameters in PassPort are set up to generate Work Order Tasks or Work List items to support work that is performed on a periodically, based on calendar dates or threshold readings. Generation of work orders/lists is performed by two batch jobs that run nightly. The first job generates the next due occurrence if within the lead time identified on the frequency or on the individual PMRQ. The second batch job is required to generate future occurrences of the work for scheduling purposes.

W230: PM Worklists

This Work flow provides instructions for using the PM Worklist and activities required to credit an item on the list as completed.

PM Worklists are arranged by Alert Group and contain PMRQ items that do not have designated model work orders. During the nightly PM generation cycle (W220), PMRQs with designated model work orders, that are scheduled to be created, are generated as work orders in the work control system. PMRQs without designated model work orders generate as an item on the PM Worklist.

A Worklisted PM can be generated for any type of periodically scheduled activity. Typical activities include:

- HP Surveillance
- Surveillance Tests
- Ticklers

Use Panel M501, "Predefined Work List". This panel shows all current PMRQ items and their due date. Items remain on this list until the item is marked as completed. A separate list for each Alert Group is created daily by the PM Batch Generator for each Alert Group referenced on the current PMRQs.

W200 Preventative Maintenance

W300 Material Management (Summary Level)

Overview

The following work flows describe the process for ordering materials and managing a Bill of Materials and Uniquely Tracked Commodities

Information about the materials required, the availability of the materials and the ability to order materials must be integrated with the work processes in order to efficiently manage corrective maintenance, preventative maintenance and testing work processes. The work flows in this section define the process for defining, ordering and tracking work materials during the work order planning process.

Every Manufacture/Model item is made of a list of parts. These piece-parts may be included in the master catalog as individual Catalog ID's. A list of piece parts that comprise the Manufacture/Model item, by Catalog ID, is referred to as the Bill of Materials (BOM) in PassPort.

Quality requirements for each of the piece-parts may vary depending on the equipment location where the Manufacture/Model item is installed. PassPort allows the engineer to define multiple versions of the BOM by equipment location to allow for differing quality requirements for the piece-parts.

A Uniquely Tracked Commodity (UTC) is a single item defined by its Manufacturer ID, Model number, and Serial number. UTCs are assigned when the same Manufacture/Model item may be installed in multiple equipment locations during its life, or when it is necessary to track a single, unique item.

PassPort tracks UTCs, records the history of installations and use of UTCs and writes Work Order Tasks and Predefined Parameters against UTCs. PassPort also provides the ability to track different UTC installations at individual equipment locations.

W310: Material Requests

This Flow describes the relationship between the Work Order Task planning process and Materials Management. The need for material for a repair is identified by the Planner. The Planner initiates a Material Request and picks items from the BOM, identifies the material by the Master Materials Catalog ID or provides a description of the material if not listed in the Catalog. The Material Request is routed for approvals as appropriate and then sent to purchasing. During this review, Engineering will evaluate new items for addition to the BOM.

W320: Bill of Materials

The need for a Bill of Material (BOM) may be identified by Engineering during the design or installation phase of equipment life, or may be identified by a Planner. Manufacturer and model number information is obtained from certified vendor information files or nameplate data and entered into PassPort. New Item Initiation is used to obtain Master Materials Catalog ID's for the spare parts/materials necessary for inclusion in the BOM.

W330 Uniquely Tracked Commodities

PassPort provides the ability to identify a specific piece of equipment as a Uniquely Tracked Commodity (UTC). UTCs are defined by a unique Manufacturer/Model/Serial number. A UTC usually has a Catalog ID that is Traceable by Serial Number. The UTC functionality allows the site to track unique pieces of equipment by serial number as it is moved from equipment location to storage to repair, to equipment location. The UTC history shows every where an UTC has been installed and when. The Equipment Location history shows every UTC which has been installed in that slot and when. CAMs and Jumpers have initially been identified as equipment that should be identified with an UTC number. In addition, Maintenance & Test equipment can also be identified with a UTC number to identify the Work Order Tasks that they were used on.

W300: Materials

Pg. 1 of 1

RPP Work Management

Section 2- Executive Summary

W800: Equipment Management (Summary Level) Overview

The following work flows describe the process for managing equipment data. At the time of PassPort implementation, there will be existing equipment locations, and a requirement to manage new equipment installations and temporary equipment installations.

Equipment components (UTCs or Manufacturer/Models) are installed in defined equipment locations. These equipment locations are usually described on piping and instrumentation drawings. The engineering attributes for each individual equipment location must be made available to Operations and Maintenance Planners. PassPort provides the Equipment/Component Data panels for this purpose. Each equipment location is defined and has multiple panels to record required data about that equipment location describing the function, the installed configuration, and regulatory requirements.

Bill of Material information may be associate to the equipment location as well as the work order task equipment history.

Assumptions

Issue #36 Equipment Data Hierarchy
Equipment Data Hierarchy: (must be complete before Data Mapping starts)
Facility - Initially Site Systems Engineering
Unit - Names Initially determined by FacilitiesCore H-14-20000 must be updated
Operating System - From the H-14-20000 drawings
Equipment Type - From the H-14-20000 drawings
Equipment ID - Assigned by Labeling group - Using 0842 Procedure 4.14
Division - A structure in a unit. Determined by FacilitiesCore Indenture.
System - May be used to indicate DST/SSST
Area - RPP doesn't need to use it. Wait for HSTD to determine Class - Won't use unless needed by HSTD.

Need to gather the validation values for each type

Gaps

- Issue #38 Look at mapping of the old H-2 equipment
Look at mapping of the old H-2 equipment tag numbers
How do we map the data to PassPort for the things that aren't in the upgrade program?
How are new equipment numbers assigned to projects so that it fits into the PassPort standard?
- Issue #44 Unique Equipment Tag
Equipment Tag should be unique, but until all equipment is in PassPort, there may be duplications. As the inventory is completed and numbers assigned, tags will be unique.
When the inventory is complete, LMSI can add an edit trigger on the field to force unique entries.
- Issue #51 Security Settings for Manufacturer/Model
Determine who has authorization to enter information, who has authorization to verify information.
Interface with Business Management to get Manufacturer codes.
- Issue #52 Determine how to map preferences
Determine the Preference settings for Equipment Data and Work Management
- Issue #53 Requirements (D030, Panel 8)
Define requirements on this panel as "Code Requirements", HSTD?
What are the types of requirements should be on this panel?
How will requirements on the panel be managed?
Who will be responsible for the panel maintenance?
- Issue #59 Jurisdiction issue
Resolve HAMTC / Material Coordinator role in the materials planning step.
- Issue #64 Measuring and Test Equipment (M&TE) Usage
Should we integrate the M&TE and RadCon Instrumentation Management into PassPort? (See Procedures HNF-IP-0842 Vol V Section 3.8 or for RadCon HNF-IP-0842 Vol VII Section 2.9)
Check-in/check-out should be handled through PassPort Inventory. There were no provisions for this in the current BMS implementation. May require a new BPI session to address.

- **Issue #142 UTCs on calibration equipment**

To link Calibration equipment used on a work order task, the equipment must have a UTC. Currently no plans are in place to assign UTCs to calibration equipment. Should we assign a UTC to calibration equipment?

W810: Equipment Data, New Equipment

This flow is intended to describe the process for entering new equipment into PassPort. Identification of requirements for new equipment is provided on an Engineering Change Notice. Preliminary design media (e.g. drawings, specifications, Bills of Material) are prepared. Based upon the preliminary design, new equipment is entered into PassPort and equipment tag numbers are created

W820: Equipment Data, Temporary Installation

A temporary Engineering Change Notice is prepared to document temporary new installations. Based upon the ECN, the temporary equipment may be entered into PassPort and equipment tag numbers identified and incorporated onto the ECN.

W820: Equipment Data, Existing Equipment

Identification of requirements for revising or adding an equipment tag number for existing equipment is provided on an approved Work Request. An ECN is prepared to document the equipment tag number. The existing equipment is entered into PassPort and an equipment tag number is assigned and incorporated into the ECN.

Future implementation will include PassPort modules: Action Tracking, Engineering Change Control, Clearance Order, and Document Management. Items on this flow are designated PassPort (blue) and non-PassPort (gray) for this implementation. Non-PassPort steps may be integrated in the future, as additional PassPort Modules are implemented. Process touch points with other PassPort modules planned for future implementations are also identified (green).

W840: Equipment Data, Balance of Data

Identification of equipment locations for new, temporary or existing installations has been defined in Flows W810-W830 of this document. After the name, location and Tag Id are defined, there are 15 panels available in PassPort to record detailed information about that equipment location. This flow is intended to describe the information that may be entered each Equipment Location.

W800: Equipment Data

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Flow 1

Summary of Projected Major Benefits

The following expected major benefits were noted during the BPI process.

- ☐ Work instructions become "standards". That is, work instructions can be prepared for one work activity, then saved as Work Standards and become available for use on any new work order. The Work Standards will print when the work package is printed.
- ☐ Maintenance procedures can similarly be saved as Work Standards, linked to the work order and identified as being needed for performance of the work. Planners will then have access to a list of standard work instructions, saving time and effort compiling new instructions for each new work task.
- ☐ This process allows for the quick initiation and authorization to perform minor work activities from a pre-approved list. This will be very useful in clearing FEP items and used heavily by the rapid maintenance group.
- ☐ Work Order Tasks - Work orders can be divided into as many as ninety-nine (99) separate and discreet work tasks. Work tasks can be planned, scheduled, released and worked independently of the other work task on the work order. This allows breaking up the work order into discreet work tasks by process or function, (i.e. planning, engineering, mechanical, electrical, fieldwork, etc.) that can be worked in parallel or series. Allows for more flexibility in scheduling and execution of work.
- ☐ Work Scope Change - Work orders that require scope change can be quickly added as an additional task to cover the scope change and then re-routed for approval and release. Provides users with the capability to quickly modify a work order and resubmit for approval and release.
Work orders requiring field change edits can be updated on closeout. The next time the work order is background (copied

into a new work order), the new work order task instruction will reflect the field edit changes. This reduces rework and improves the quality of work orders

- ☐ Daily Work Status - Craft and Supervisors can report work task status on-line. This information then can be uploaded daily to a P3 schedule for updating, rescheduling, and resource allocation. Reduces the number of status and planning meeting.
- ☐ Work Assignment - Work tasks are assigned by crews, teams, or individuals. Provides users with an on-line simple interface for daily work tasks.
- ☐ Material Status - Work order material status can be viewed by anyone with access to the system. Improves scheduling capabilities. Provides users with a process to quickly check on ordered material status
- ☐ Work Order Close Out - When new or modified equipment is installed work order closeout will automatically update the equipment database (PassPort Master Equipment List) with the new installed components, while maintaining a comprehensive equipment history. Provides an enhanced equipment configuration control capability
- ☐ PassPort provides a panel that allows you to identify M&TE that was used during the work execution. Within PassPort, M&TE can be uniquely identified and tracked as a Uniquely Tracked Commodity (UTC). Provides you with the capability to easily retrace all work that was completed with suspect M&TE.
- ☐ The Work Request process is quick and easy. It can be done by anyone with access to the PassPort system. A minimal number of fields must be filled in to initiate a W/R. A process to easily check for duplicates is provided.
- ☐ Material requests - A Bill of Materials (BOM) (parts list) can be front loaded and added to as we go. This will allow planners to identify proper parts for equipment and submit a materials request from a pre-approved BOM. The BOM is controlled and

reviewed by engineering and QA therefore the material request can be submitted to the material coordinator without more approvals.

- ☐ Field Paper Work - All work order (work package) documents are maintained in an electronic media. The only documents that need to be printed are those required by craft personnel to take to the field
- ☐ Uniquely Tracked Components - Allows tracking of equipment like CAMs, breakers, and compressors to locations and equipment history
- ☐ Project Management - PassPort provides a simple system that can flow down mission requirements to the work order/task level, and rolls up project performance based on Work Management progress and accrued cost.
- ☐ Actions Taken - Actions taken against work control objects (work request, work order, material requests, work standards, etc.) are automatically tracked so you know who took the action, when, and what they did with it
- ☐ Lock and Tag - PassPort allows you to identify isolation boundaries for a specific equipment location.
- ☐ Work Request Validation - Validator must not only validate work for applicability but must also validate the work can be funded.

Section 3 - Work Flows

3a - Work Flows

W100: Work Planning

This section (W100-W190) addresses all types of work planning done at RPP. It is the intention that all work done within RPP is done with in the scope of a TBR, and is therefore traceable.

W101: Identify Unplanned Work

Overview

The Work Request process will be utilized to identify (and report to Operations) broken or degraded equipment and to report the need for physical work to improve the material condition of facilities. The Work Request provides a validation process which will identify duplicate Work Requests, verify that the work is funded and allow Operations to evaluate problems to determine if there are required mitigating actions which should be taken.

Assumptions

- Any RPP employees may initiate a Work Request in PassPort.
- Default Route Lists will be created in PassPort for each Tank Farm for the approval routing of the Work Requests.

Policies

Work Requests must be generated to report broken or degraded equipment to ensure a review by Operations.

Gaps

Issue 289, 290, 291
(Need to make Priority a required field)

1 Check for Duplicates

Prior to initiating a Work Request to report equipment that is broken or degraded, use the *Open Work Request* panel (M013) to

determine if the problem has already been reported. This panel can only be used to search for Work Requests written against an Equipment Location or a Uniquely Tracked Commodity (UTC).

- Equipment Location:
Identify the 'work against' as equipment
Prompt on the equipment field
- Enter further selected criteria
Uniquely Tracked Commodity:
Identify the 'work against' as UTC
Enter UTC Code
Determine if duplicate

Cross Reference: PassPort panel M013

Procedures: HNF-IP-0842-Vol. V, Section 7.1

2

Initiate Work Request

The Work Request panel is used to report the problem. After the determination has been made that the problem has not been previously reported, a Work Request should be initiated. The Work Request panel (M010) is accessed from the Work Management menu of PassPort under 'Initiating Work'.

- When the panel appears, select File, New or click on the "New" icon on the toolbar.
- Enter the following information to identify the problem or needed work.
Enter Description Code and Description
Select the 'work against' (Equipment, UTC or Name) The default is Equipment.
Name is only used when work cannot be made against Equipment or UTC.
Enter Unit (or prompt and select)
If the work against is 'Equipment', prompt on Equipment and select the proper equipment location.
If the work against is 'UTC', enter the UTC number

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5	<p>If the work against is 'Name', enter the name and a location for the work.</p> <p>Additional Description Button – Enter details as needed Details Tab - Enter Failure Date and Time if known</p> <p>Cross Reference: PassPort panels M010 and M011 Procedures: HNF-IP-0842-Vol. V, Section 7.1</p>	<p>Cancelled Work Request</p> <p>If the Work Request is to be cancelled, utilize Option 5 to cancel the Work Request. Enter the cancellation reasons. The Originator of the Work Request will receive a AAA notification that the Work Request was cancelled. The Originator can utilize Option 6 to view the cancellation reasons.</p> <p>If the work is valid but not funded designate the Work Request priority as "Deferred" (D) and "Cancel" the Work Request via Option 5.</p> <p>Cross Reference: PassPort Panels M010, Option 5 Procedures: HNF-IP-0842 Vol. V, Section 7.1</p>
	<p>3</p> <p>Submit for Validation</p> <p>After the problem has been adequately described, the user must route the Work Request.</p> <ul style="list-style-type: none">• The user may use Option 1 (M010) to verify the route list is appropriate and make changes as needed. A default route list exists for each Unit/equipment ID. Verification is not a required step• Use Option 2 (M010) to send the Work Request via a route list to the appropriate personnel for validation. <p>Cross Reference: PassPort panel M100 Option 2 Procedures: HNF-IP-0842-Vol. V, Section 7.1</p>	
4	<p>Work Request Validation (Approval)</p> <p>Work Requests will be routed to Operations for validation. The personnel who appear on the route list for the Work Request will receive an Action, Awareness, Alert (AAA) notification. The person validating the Work Request has the option of canceling or approving the Work Request. The person validating the Work Request is also expected to screen the Work Request for need, funding, duplicate requests, priority, and work type.</p> <ul style="list-style-type: none">• Verify that the work is covered by a valid TBR. This ensures that the work is funded.• If request is considered not valid note reason for rejection in Additional Description (duplicate, work not necessary, not funded, etc.).• Set the priority.• If the Work Request is valid, utilize Option 3 and approve the Work Request. <p>Cross Reference: PassPort Panels M010, M011, M014, M015, X270 Procedures: HNF-IP-0842 Vol. V, Section 7.1</p>	

W101 Identify Unplanned Work

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W105: TBR Work Order Planning (option)

Overview

In order to capture cost and schedule information at a level below the CACN / COA level it is possible to create work orders for each activity in a TBR. The Manager responsible for the work associated with a TBR CEIS is responsible to ensure that the TBR Work Order is planned and approved. This also provides a convenient way to identify approved TBR budgets. When PassPort Project Management Cost and Schedule panels are implemented, this process will be revised.

Assumptions

- All RPP work is defined through TBRs
- The TBR relationship to the Requirement (HSTD) has been defined and approved.
- A TBR may represent a single or multiple projects
- Work Orders are written to for each major activity of the TBR.
- Sub-activities of the TBR will correspond to Work Order Tasks.
- A Supplemental Work Order will be created from any TBR Work Order Task for physical work on equipment or structures.

Issue #129 Non-equipment Work Planning

All work done should be controlled through either an action item or through a Work Order Task item. Using one or both will allow use to manage work on site and provide visibility for tasks being done. This will provide visibility for the line managers, regardless of the level of accounting available through CACNs.

These PassPort Modules are available:
Work Management
Project Management (TBR, not cost & Schedule)

Policies

The TBR will be approved prior to creation of the associated Work Order(s). This provides the validation of work orders that have been specifically called out in the cost estimating work sheets (CEIS). Work generated from tasks which are not specific in scope will be generated via a work request and will need to go through validation described in W101.

Gaps

TBR Development and Maintenance Requirements are not known.

1 Generate Work Orders based on Activities

Use each applicable specific activity in a TBR CEIS to create a separate Work Order. These Work orders will be used to manage all work done within the scope of a TBR.

Cross Reference: PassPort Panel M100
Procedures:

2 Create Tasks within Work Orders

Identify all tasks within the work order/activity. These are the activities identified within the CEIS.

- Create a new Work Order Task from the Work Order Outline panel M100 by pressing the 'New Task' button to navigate to the Task Profile panel M101 for the new task.
 - Enter the Interrupt, Job Type and Task title.
 - Enter the Accounting codes.
 - Chose 'Name' as the work against. For work which is not specific to a tank farm, use "241" as the Unit designator.
 - Enter the Name (same as the task title).
- If any Activities relate exclusively to physical work to repair, modify or add equipment or structures, create a Supplemental Work order from that task activity using Option 6 on the Task Profile panel M101. Refer to Work flow Analysis W110, Task 4 for planning this work order.

Cross Reference: PassPort Panels M100, M101, M102 and M103.

Procedures:

3 Write Work Instructions

Choose the 'Instructions' folder tab and enter the general instructions that should be followed to perform the task. Identify any work standards (detailed written instructions and/or procedures that should be followed). Attach these documents in the work standards section of the 'Instructions' panel.

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Cross Reference: PassPort Panel M102
Procedures: HNF-IP-0842 Vol V Sec 7.1

4 Identify Resources

Choose the 'Resources' folder tab and input the resource estimate for the task.

Cross Reference: PassPort Panel M103
Procedures: HNF-IP-0842 Vol V Sec 7.1

5 Attach Document References

Choose the 'Document References' folder tab and enter any references that are important to the performance of this work. References that are identified as being the requirement for performing this activity should be included.

Cross Reference: PassPort Panel M104
Procedures: HNF-IP-0842 Vol V Sec 7.1

6 Create Contract/Requisition

Choose the 'Contracts/Expenses' folder tab and enter any contract or requisition number that is specific to this activity. If it is necessary to request a new contract, use Option 1 to access and fill out a Contract Requisition.

Cross Reference: PassPort Panel M107
Procedures: HNF-IP-0842 Vol V Sec 7.1

7 Materials

Materials that will not be ordered via a Material Request should be entered on the Non-Contract Expenses block on the 'Contracts/Expenses' panel M107. Materials that are ordered via a PassPort Material Request (panel I010) should reference the TBR Work Order Task.

Cross Reference: PassPort Panel M107, I010
Procedures: HNF-IP-0842 Vol V Sec 7.1

8 Route W/O For Approval

The TBR Work Order must be routed for approval by the Manager responsible for the CEIS activity represented by the Work Order (Tasks).

- From Panel M100, use Option 1 – Attach/Review Routing Approval List
- Place the manager on the routing for approval.
- Save and Exit.
- From Panel M100, use Option 2 – Submit the Work Order for Approval

Cross Reference: PassPort Panel M100

Procedures: HNF-IP-0842 Vol V Sec 7.1

W105 TBR Work Order Planning (Option) Pg. 1 of 1

RPP Work Management

W106: TBR Work Order Performance (option)

Overview

Work Orders written for the performance of Non-Equipment work are generally opened for an extended period of time and are intended to capture the material expenses and labor expended by personnel who perform work on the TBR activities.

Assumptions

The following PassPort modules are in use:

- Work Management
- Project Management

Policies

All activities at RPP can be associated with an approved TBR.

Gaps

Need Labor Entry to allow automatic tracking of resource hours

1 Work Order Approval

The Manager of the TBR CEIS activity represented by the Work Order will receive the AAA action to review and approve the Work Order Tasks. The Manager should at a minimum verify that all activities are represented by a Work Order Task and that the correct accounting codes are input on each task. Supplemental Work orders for physical work to perform a major repair, modification or to add equipment or structures may be created and planned at a later date.

If the Work Order Tasks are acceptable, the Manager should approve the Work Order using Option 3 on the Work Order Outline panel M100.

When it is time to start the work, the Manager must use Option 5 to place the appropriate Work Order Tasks to the 'Ready' status. This allows completion information to be entered and hours/materials to be tracked.

Cross Reference: PassPort Panel M100

Procedures: HNF-IP-0842 Vol V Sec 7.1

2 Perform Work

As work is performed, a running log of the work should be entered on the Work Order Completion panel M301 under the comments

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button. Labor hours against this Work Order Task may be entered after the PassPort Labor Entry module is implemented.

Cross Reference: PassPort Panel M301

Procedures: HNF-IP-0842 Vol V Sec 7.1

3 Review Work

When the work on the individual Work Order Task is completed, Option 5 on the Work Order Completion panel is used with the selected task to change the task's status to 'Finished'. If there is a supplemental work order associated to the Work Order Task for physical work on equipment or structures, that work order must be completed before the task can be taken to 'Finished' status.

Cross Reference: PassPort Panel M300

Procedures: HNF-IP-0842 Vol V Sec 7.1

4 TBR Work Order Completion

When all of the Work Order Tasks on a TBR Work Order are in 'Finished' status, the Manager of the work will review all of the tasks. If the work is satisfactory, use the 'Complete' button in the Work Order Completion panel to change the work order status to 'Complete'.

Cross Reference: PassPort panel M300

Procedures: HNF-IP-0842 Vol V Sec 7.1

W106 TBR Work Order Performance (Option)

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W110: Work Planning

Overview

Reports of broken or degraded equipment must be reported to Operations to determine if mitigating actions are required. In addition, each Work Request should be validated to ensure that the requested work is funded by ensuring that the work is included in an approved RPP TBR. Once validated, the work request is sent to the planning center. The planning center groups work requests into work orders as appropriate and determines the type of work order planning to occur.

Assumptions

Default Route Lists will be created in PassPort for each Tank Farm for the approval routing of the Work Requests.

When Project Management is implemented, the TBR number will exist as a Project number which can be input on panel M011.

A standard will be prepared for the creation of, format for and naming convention for work standards prepared on the Work Standard panel D650.

Policies

- QC requirements will be embedded in the work instructions
- Work Requests must be generated for corrective maintenance before a work order can be initiated. This ensures that Operations concurs with the need, the work is funded, and the work has not been previously identified.
- If the work order is related to the resolution of an existing Non-Conformance Report (NCR) then the NCR number must be entered on the Nuclear Details screen (M111).

Gaps

- Issue #69 Work Request Routing List
Need a default Work Request Routing List for each unit.
Possible use for determining validation levels.
- Issue #81 Define rework
Define what "rework" means on the task detail (child panel) from M101.

- Issue #84 Coding for Work Standards
Determine the coding structure for Work Standards
Work standards numbering format.
- Issue #90 Correcting errors in assigning W/R to W/O via M050
If you added the wrong W/R to a W/O. What is the process to connect that W/R to the Correct W/O or to background the W/R and Start Over. Other issue is that the original W/R is marked complete when it's backgrounded. Need to have procedure to mark new backgrounded W/R as a duplicate of original.
- Issue #96 Equipment Lists
Determine what type of equipment from the PassPort Master Equipment List will be listed as "reserveable".
Reference Panel 7, M106, Equipment Need block.
Make the list part of the procedures.
- Issue #97 Contract/Expenses
How are contracts/expenses to be handled in the future under PassPort from a PHMC perspective?
What are the Roles and Responsibilities of the various functions that would require the need to generate a contract?
- Issue #119 Permits and Forms for AJHA
Determine how to provide permits and forms to the Work Order Task (panel)
- Issue #127 NCR Number Length
Do Non-conformance Report numbers fit in the 7 character field allocated by PassPort? If not, need to address the report numbering scheme.
Possible contacts: Roger True, Nancy Daniels
More Information:
Approved version will be enacted January 1 1999 - Current plans call for the NCR format to be:
LM98-TFF0-IOSR-000
LM98-CTIS-RPRS-000
Possible solution: 98-000 (preferred) - site conflicts?
or
LM98000 (to deal with other contractors)
- Issue #137 Clearance Order Process
Work out the process to identify to Operations that a tag out is required for a particular Work Order.
Determine what form the notification/report takes:
P3/PassPort, Status report, Crystal Report, etc.

RPP Work Management

Section 3a — Work Flows

- Issue #151 PM RQ W/O Status
Preventative Maintenance W/O can be generated in either "ready" or "plan" Status. What is the criteria for determining which status the W/O is generated in? (Affects Work Management and Scheduling)

1 Assemble Work Order

Validated Work Requests are reviewed by the Planning Center/Lead Planner. The 'Assemble Requests into Tasks' panel M050 provides a clearing house for the planner to simplify assignment of the Work Request to a work document. The Planning Center/Lead Planner has four possible work processes which may be utilized to manage the required work (Minor Maintenance, Expedited Work Order, Enhanced Work Planning EWP Work Planning and non-EWP Work Planning)

- The the Planning Center/Lead Planner may examine the approved Work Requests which have not yet been assigned to a work order or Minor Maintenance from the M050 panel. This is done by prompting on the Reference field (reference type 'W/R') to navigate to the Work Request prompt panel M01A. Once on the prompt panel, pull down the 'View' menu and select #2 'By Regulated Unit, Regulated Comp'. This prompt selection allows selection of approved Work Order Tasks by Job Type, Unit, Op-System, System, Equipment Type and number. Select Work Requests which meet the selection criteria to bring back to M050. From the listed Work Requests on M050, each can be reviewed via 'more detail'.
- Minor work may be converted to Minor Maintenance by the Planning Center/Lead Planner. A list of allowable Minor Maintenance activities may be accessed via the Attributes button on Panel M010. Prompt on the Templates prompt on X270 and choose the "Minor Maintenance Activities" template. A justification for Minor Maintenance should be entered in the Notes section for the category of Minor Maintenance chosen. Use Option 7 to 'Open Minor Maintenance'. Notify the Supervisor responsible for the completion of the work.
- Routine work may be converted to an Expedited Work Order by the Planning Center/Lead Planner. An Expedited Work Order is a one task, single resource work order that does not

require extensive planning. The Expedited Work Order does not require routing for approval, i.e. it is created in the 'Ready' status. Additionally, an Expedited Work Order does not require Enhanced Work Planning (EWP). If the work to be performed fits the requirements of an Expedited Work Order, convert the Work Request to an Expedited Work Order by utilizing Option 9, 'Create Expedited Work Order' from panel M010. Enter the Job Priority and Interrupt value. Change the title of the work order as necessary. Enter the accounting values and a resource. The work order is created in a ready to work status. Use the 'Send' function of PassPort to E-mail the Expedited Work Order to a Planner to complete the planning. Each Work Request should be examined with the intention of creating work orders to complete the work. The Assemble Requests into Tasks' panel M050 allows the Lead Planner to group Work Requests which can be planned and performed as a single work order. Work Requests which should not be grouped with the rest of the listed Work Requests should be deleted from the list. Once a list of Work Requests has been assembled for association with a Work Order, the Lead Planner has a choice of three methods to create the work order. The Work Order Type and discipline should be entered on M050 and then:

1. *Create a new work order.* Using this button, an entirely new work order is created from the Work Requests listed. At new task is created on the new work order for each Work Request on the list. The Work Requests will change status to ACTIONED and the status history will show the association to the new Work Order Tasks.
2. *Create with Background.* Using this button, an existing work order is copied. The Work Requests will change status to ACTIONED and the status history will show the association to the new work order. Existing tasks on the backgrounded work order will be copied. If there are more Work Requests selected than are tasks on the background work order, additional tasks will be placed on the resulting work order. If they are not necessary to perform the work, they can be deleted.
3. *Associate to Work Order.* Using this button, the Work Request is associated to an existing work order. The intent is to show that completion of the existing work order

will accomplish the work identified in the selected Work Requests. The Work Requests will change status to ACTIONED and the status history will show the association to the existing work order.

Cross Reference: PassPort Panels M010, M050
Procedures: HNF-IP-0842 Vol. V, Section 7.1

2 Minor Maintenance

See Work Flow W110.2 shows the process for the completion of Minor Maintenance functions.

3 Plan Expedited Work Order

Work Flow W110.3 shows the process for completion of the planning of an Expedited Work Order.

4 Plan EWP Work Order

Work Flow W110.4 shows the process for completion of the planning of a regular work order (may be multiple tasks) utilizing the Enhanced Work Planning (EWP) process.

5 Plan Non-EWP Work Order

Work Flow W110.5 shows the process for planning a regular work order (may be multiple tasks) for work which does not require the Enhanced Work Planning process. This work is usually repetitive in nature or follows other pre-approved instructions. If the work order is a PM, planning must be complete before the Due Date.

W110 - Work Planning

W110.2: Perform Minor Maintenance

Overview

A Work Request may result in Minor Maintenance as described by a list of Minor Maintenance activities. This flow describes the process for completing work that has been designated Minor Maintenance. Minor Maintenance may be requested directly by operations.

Assumptions

Standing AJHAs will be prepared for each activity permitted to be performed on Minor Maintenance.

Minor maintenance activities use standard AJHA and minor work instructions that may involve pre-approved procedures.

Policies

A pre-approved list of activities will be used to designate the type of work allowed to follow this process flow.

Gaps

- Issue #73 Minor Maintenance Activities List
Develop a pre-approved list of minor maintenance activities and standard AJHA references. Use Attributes template.
- Issue #74 Craft Use of PassPort
We need to get craft to use the Additional Description block of the Work Request?

1 Review Standing AJHA

Operations, Field Work Supervisor, or the Lead Planner designate the Work Request as Minor Maintenance based on a list of allowable Minor Maintenance tasks using the Attributes button on the Work Request panel M010. The Supervisor then opens the AJHA tool and reviews the Standing AJHA for this work (Issue #73). The Supervisor should verify the conditions for the Standing AJHA that apply to the task.

Cross Reference: Automated Job Hazard Analysis (AJHA) Tool
Procedures: HNF-IP-0842, Vol V Section 7.1

2 Add Additional Work Instructions

The Maintenance Supervisor adds any specific work instructions and/or any special mitigation actions from the AJHA in the Additional Description.

If, during the supervisor's review, the supervisor determines that the work required is beyond the scope of Minor Maintenance the supervisor should detail the reasons and 'Complete Minor Maintenance' using Option 8. In order to ensure that the work is complete via a regular work order, the Supervisor must then generate a new Work Request by backgrounding the current Work Request and adding additional details about the task to be performed that explains why it is not Minor Maintenance.

Cross Reference: PassPort panel M010, X270

Procedures: HNF-IP-0842, Vol V Section 7.1

3 Finalize Document

The Maintenance Supervisor prints the Work Request (P010), obtains and performs pre-job briefing with performing craft.

Cross Reference:

Procedures: HNF-IP-0842, Vol V Section 7.1

4 Perform Work

Worker/Craft gathers tools and verifies latest revision of drawings/procedures. Notifies building manager/facility manager of work to be performed. Performs work in accordance with Work Request. Debriefs with Supervisor. Record and comments on Panel M010, "Additional Description".

Procedures: HNF-IP-0842, Vol V Section 7.1

5 Document Work

Worker/Supervisor goes to M010, Additional Description and records what work was performed. (Issue #74). The documentation of the work is given to the Supervisor for review/archiving.

Cross Reference: PassPort panel M010, X270.

Procedures: HNF-IP-0842, Vol V Section 7.1

6 Complete Minor Maintenance

Maintenance Supervisor reviews the work completed as recorded on the Additional Description and adds any comments. If the Minor Maintenance is complete and properly documented, Option 8 'Complete Minor Maintenance' is used to close the Work Request.

Cross Reference: PassPort panel M010

Procedures: HNF-IP-0842, Vol V Section 7.1

W110.2 - Perform Minor Maintenance

W110.3: Plan Expedited Work Order

Overview

A Work Request may result in an Expedited Work Order. This flow describes the process for planning an Expedited work order. This work must meet specific criteria for performance and consists of a single task.

Assumptions

This process will replace the use of what we currently call routine Work Request.

Policies

Expedited work is determined by a set of criteria of which it must meet.

Gaps

None

1 AJHA

The Planner receives the request to complete the planning of the Expedited work order via email. The first step is to attach standard Automated Job Hazard Analysis (AJHA). The results of the AJHA are incorporated into the work instructions or added as Permits by the Planner.

Cross Reference: Automated Job Hazard Analysis Tool.

Procedures: HNF-IP-0842 Vol. V, Section 7.1

2 Write Work Instructions

Access the Instructions folder. Enter simple work instructions or attach a Work Standard. If necessary, a work standard can be prepared via the D650 panel.

Cross Reference: PassPort panel M101, D650.

Procedures: HNF-IP-0842 Vol. V, Section 7.1

3 Add Permits

Access the Permits folder. Enter the required permits. Embed the Permit form. Fill in the required data on the permit form.

Cross Reference: PassPort panel M105.

Procedures: HNF-IP-0842 Vol. V, Section 7.1

4 Order Materials

Access the Material Request folder. Fill out the material request per the instructions in the Work Flow W310. Priority lists

Cross Reference: PassPort panel I010

Procedures: HNF-IP-0842 Vol. V, Section 7.1

W110.3 - Plan Expedited Work Order

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Flow 1

W110.4: Plan EWP Work Order

Cross Reference: PassPort Panels M100, M101, X270
Procedures: HNF-IP-0842 Vol. V, Section 7.1

Section 3a – Work Flows

Overview

A Work Request may result in an Enhanced Work Planning (EWP) Work Order. A Work Order prepared to perform complex or high-hazard work for the first time must be planned using the EWP process. This flow is intended to describe the planning for a work order via the EWP process.

Assumptions

None.

Policies

None.

Gaps

None.

1 Develop Team

The EWP process is based on a team planning process. It is the work planner's responsibility to identify the team members. A PassPort work order may be made up of one task or as many as 99 Work Order Tasks. Each task is a work package. The plan (all tasks) is approved at the work order level. No tasks may be performed until the work order plan is approved. Each task may be separately scheduled and performed. The EWP process may be applied to an entire Work Order or to an individual task. The work order Attribute Button is used to access the X270 panel to record the team members. The Attribute Button is accessed from the M100 panel at the work order level and from the individual task from the M101 panel.

From the Attributes panel X270, the planner uses the Attributes Profile Template prompt to select the 'EWP Team' template. The EWP Team template consists of a list of possible team members by job title. Enter the names of the team members in the attribute value field that corresponds to the job title. Associated with the listing for each team member on the attributes panel is a notes button which allows access to a OLE enabled word processor for recording planning notes.

2 Field WalkDown (or Tabletop) & Debrief

The EWP Team will perform a walk down and/or a tabletop discussion and address the applicable sections of the RPP desk instruction for EWP. Debrief the walk down and document decisions, concerns, etc. in the Notes section associated with the EWP Walkdown attribute on the Attributes Profile panel (X270).

Cross Reference:

Procedures: HNF-IP-0842 Vol. V, Section 7.1
 RPP desk instruction for Enhanced Work Planning

3 Identify Document References

The planner should next gather the documents necessary for the EWP planning meeting. The document references can be listed on the appropriate Work Order Task under the Documents folder panel M104.

Documents are gathered for the Team Meeting.

Cross Reference: PassPort Panel M104

Procedures: HNF-IP-0842 Vol. V, Section 7.1

4 Draft Resolution

The Planner takes the information they have and generates a strawman of a resolution to be used by the EWP team.

From the Task Profile (Panel M101), select the 'Materials' folder and fill out the Material Request (panel I010) per the instructions in Work Flow W850 to reserve required materials. This process is only for replacement parts or materials needed for this task. The tools will be listed under tab 7, "Tools & Equipment"

Once complete, the Material Request Routing will be defined by the Planner per the instructions in Work Flow W810.

RPP Work Management

Cross Reference: PassPort Panel I010
Procedures: HNF-IP-0842 Vol V Sec 7.1

5 EWP Team Meeting

The Enhanced Work Planning (EWP) desk instruction provides guidance for the planner in how to conduct a meeting and the topics to be discussed. The planner documents decisions, concerns, etc. in the Notes associated with the 'EWP Team Meeting' attribute on the Attributes Profile panel (X270). If work is more suited to Minor Maintenance or Repetitive tasks, or fits as an Expedited work order, inform the planning supervisor and stop the EWP process for this task.

Cross Reference:

Procedures: HNF-IP-0842 Vol. V, Section 7.1
RPP desk instruction for Enhanced Work Planning

AJHA/Permits/Requirements.

Refer to flow W150. Fill out an AJHA for the Work Order. In some cases, it will be necessary to perform a Job Hazard Analysis on an individual task. This is always necessary when the EWP process is being applied to an individual Work Order Task.

Cross Reference: AJHA Tool, PassPort Panel M102, M105
Procedures: LMH-PRO-079

Access the 'Resources' folder for each task. Enter the required resources, number required and hours.

6 Resolution

After the EWP Team meeting and the walk down, the Planner should return to the work order and create the appropriate number of Work Order Tasks for the job. Individual tasks should be prepared for work that will be performed by separate organizations at possibly different times. Panel M100, "Work Task Outline" and

Section 3a – Work Flows

M101, "Task Profile" are used to prepare the Work Order Task (s). The work order created from the Work Request by the Planning Lead will contain one task for each Work Request that was identified. The Work Order to perform the actual work necessary to mitigate the problems stated in the Work Requests may require more or fewer tasks (work packages). To delete a task, select the task on the Work Order to delete and press the delete key. If an additional task is required, press the add task button on the Work Order Outline panel (M100).

On the Work Order Task Profile panel M100 for each task, enter the Interrupt, the Priority, the accounting codes and the Work Against.

In order to enter the Work Against:

- Identify the work against by choosing the category from the option buttons. Equipment, UTC, Work Item or Name & Location.
- Fill out the required fields that appear, depending on the work against type.

To prepare a draft resolution for each task, access the Instructions folder. Enter the instructions for the task or check the print box and select a work standard. If it is appropriate, create a specific work standard for this task. Work Standards are created on the Work Standard panel D650. Work Standards provide the capability to create a work document in with a standard word processing software such as Microsoft Word. This document will print with the work package if the print checkbox is checked.

Cross Reference: PassPort Panels M100, M101, M102, M103 and D650

Procedures: Work Standard Format Desk Instruction

7

Reserve Tools and Equipment

Access the 'Tools & Equipment' folder for each task:
Tools:

Prompt on the Catalog ID. Refine the search by 'Tool' as the Category. Select tool to be used, fill in Q Level (required), Number required and Need By Date. Fill in other information as available. The tools listed on this panel are special tools that are checked out to the user. This includes calibrated test equipment.

RPP Work Management

Section 3a – Work Flows

to Work Flow W111 for the process to enter a Lock&Tag permit on the Permits/Requirements panel M105 and to Place a Clearance Request (CR) hold on the Work Order Task.

Cross Reference: PassPort Panel M105, M130, M131
Procedures:

Equipment:
Prompt on the Equipment/Component field. Use the filter criteria to narrow the selection. Select the Equipment location that is to be reserved for the task. This usually is a specific process pump or installed crane, etc. that is necessary to be operated to support this Work Order Task. Enter the Need By Date (& Time if known).

Cross Reference: PassPort Panel M106
Procedures: HNF-IP-0842 Vol V Sec 7.1

8 Contracts/Expenses. (Issue #97)

Access the Contract/Expenses folder for each task.

Contracts:

If it is necessary to let a special contract for the work on this Work Order Task, it is possible to access the Contract Requisition from this panel. Fill out the contract Requisition as necessary. If there is already a contract requisition or contract in place for the work, enter the number on the Contracts/Expenses panel M107.

Non-Contract Expenses:

Used for other expenses (P-Card) to collect estimated costs.

Cross Reference: PassPort Panel M107
Procedures: HNF-IP-0842 Vol V Sec 7.1

9 Nuclear Details

If the work is associated with FSAR, Technical Specification or BIO, this panel is applicable. The Limiting Condition for Operation should be referenced. Also, the Unit Condition Required (UCR) for the work should be entered. In addition, if the work is associated with a Non-Conformance Report (NCR) the number should be entered on this panel.

Cross Reference: PassPort Panel M111
Procedures: HNF-IP-0842 Vol V Sec 7.1

10 Request Clearance from Operations

One outcome from the EWP planning process and the performance of the Job Hazard Analysis is the identification that a Clearance (Lock&Tag) will be required to perform the work. Refer

W110.4 - Plan EWP Work Order

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W110.4 - Plan EWP Work Order

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W110.5: Plan Non-EWP Work Order

Overview

Work which has been previously planned via the Enhanced Work Planning process or which is of low hazard and complexity need not be processed through the EWP process. These work orders are called non-EWP Work Orders.

Assumptions

None.

Policies

None.

Gaps

None.

1 Identify Document References

The first step in planning a non-EWP Work Order is to check if there was previous performance of the work. Previous JCS work orders should be reviewed where applicable. If the previous planning/performance was via a PassPort work order or a PassPort Model Work Order has been Authorized for this work, the tasks from that work order should be backgrounded into this new work order. Identify and gather the documents necessary to plan the work. If a backgrounded task is used, the document references should already be there. Assume all necessary documents are referenced on panel M104. The documents that should be included in the field copy of the work package must be checked in the print box on the Document References panel M104.

Cross Reference: PassPort panel M104

Procedures: HNF-IP-0842 Vol. V, Section 7.1

2 Coordinate with Cog Engineer

The planner should consult with the Cognizant Engineer to ensure he/she agrees that the intended work and method for the work is appropriate.

Cross Reference: None

Procedures:

3 Field WalkDown (or Tabletop) & Debrief

Perform a walkdown with the Cog Engineer and Craft as appropriate. Document decisions, concerns, etc. in the Notes associated with the Walkdown attribute on the Attribute Profile panel (X270) from the Work Order Outline panel M100.

Cross Reference:

Procedures: HNF-IP-0842 Vol. V, Section 7.1

4 Draft Resolution

After the Walkdown and meeting with the Cog Engineer, the Planner should return to the work order and create the appropriate number of Work Order Tasks for the job. Individual tasks should be prepared for work that will be performed by separate organizations at possibly different times. If the Work Order Tasks were backgrounded from an existing Work Order or Model Work Order the appropriate tasks should already exist on the Work Order. Panel M100, "Work Task Outline" and M101, "Task Profile" are used to prepare the Work Order Task(s). The work order created from the Work Request by the Planning Lead will contain one task for each Work Request that was identified. The Work Order to perform the actual work necessary to mitigate the problems stated in the Work Requests may require more or fewer tasks (work packages). To delete a task, select the task on the Work Order to delete and press the delete key. If an additional task is required, press the add task button on the Work Order Outline panel (M100).

On the Work Order Task Profile panel M100 for each task, enter the Interrupt, the Priority, the accounting codes and the Work Against.

In order to enter the Work Against:

- Identify the work against by choosing the category from the option buttons. Equipment, UTC, Work Item or Name & Location.
- Fill out the Unit and the other fields which appear depending on the work against.

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To prepare a draft resolution for each task, access the Instructions folder. Enter the instructions for the task or check the print box and select a work standard. If it is appropriate, create a specific work standard for this task. Work Standards are created on the Work Standard panel D650. Work Standards provide the capability to create a work document with a standard word processing software such as Microsoft Word. This document will print with the work package if the print checkbox is checked.

Access the 'Resources' folder for each task. Enter the required resources, number required and hours.

Cross Reference: PassPort Panels M100, M101, M102, M103 and D650

Procedures: Work Standard Format Desk Instruction

5 AJHA/Permits/Requirements

Refer to Work Flow W150. Fill out an AJHA for the Work Order. In some cases, it will be necessary to perform a Job Hazard Analysis on an individual task. This is always necessary when the EWP process is being applied to an individual Work Order Task.

Cross Reference:

Procedures: HNF-IP-0842 Vol V Sec 7.1

6 Reserve Tools and Equipment

Access the 'Tools & Equipment' folder for each task:
Tools:

Prompt on the Catalog ID, refine search by selecting category as "Tool". Select tool to be used, fill in Quality code (required), Number required and Need By Date. Fill in other information as available.

The tools listed on this panel are special tools which are checked out to the user. This includes calibrated test equipment.

Equipment:

Prompt on the Equipment/Component field. Use the filter criteria to narrow the selection. Select the Equipment location which is to be reserved for the task. This usually is a specific process pump or installed crane, etc. that is necessary to be operated to support this Work Order Task. Enter the Need By Date (& Time if known).

Cross Reference: PassPort Panel M106

Procedures: HNF-IP-0842 Vol V Sec 7.1

7 Contracts/Expenses. (Issue #97)

Access the Contract/Expenses folder for each task.
Contracts:

If it is necessary to let a special contract for the work on this Work Order Task, it is possible to access the Contract Requisition from this panel. Fill out the contract Requisition as necessary. If there is already a contract requisition or contract in place for the work, enter the number on the Contracts/Expenses panel M107.

Non-Contract Expenses:

Used for other expenses (P-Card) to collect estimated costs.

Cross Reference: PassPort Panel M107

Procedures: HNF-IP-0842 Vol V Sec 7.1

8 Nuclear Details

If the work is associated with FSAR, Technical Specification or BIO, this panel is applicable. The Limiting Condition for Operation should be referenced. Also, the Unit Condition Required (UCR) for the work should be entered. In addition, if the work is associated with a Non-Conformance Report (NCR) the number should be entered on this panel.

Cross Reference: PassPort Panel M111

Procedures: HNF-IP-0842 Vol V Sec 7.1

9 Identify Required Materials

From the Task Profile panel M101, select the 'Materials' folder and fill out the Material Request panel I010 per the instructions in Work Flow W850. This process is only for replacement parts or materials needed for this task. The tools will be listed under tab 7, "Tools & Equipment"

Once complete, Route the Material Request to QC, Engineering, Material Coordinator, etc. as required.

Cross Reference: PassPort Panel I010

Procedures: HNF-IP-0842 Vol V Sec 7.1

10 Request Clearance from Operations

One outcome from the planning process and the performance of the Job Hazard Analysis is the identification that a Clearance (Lock&Tag) will be required to perform the work. Refer to Work Flow W111 for instructions for placing the Clearance Request on the Permits/Requirements panel M105, and placing a Clearance Request (CR) hold on the Work Order Task that requires the Lock&Tag

Cross Reference: PassPort Panel M105, M130, M131

Procedures: HNF-IP-0842 Vol V Sec 7.1

W110.5 Plan Non-EWP Work Order

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W110.5 - Plan Non-EWP Work Order

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W111: Request Clearance from Operations

Overview

When the Planner is creating a work order to perform maintenance or modifications to equipment, Locks and Tags (Clearance Orders) may have to be hung to identify the work boundaries and to ensure that the process is de-energized/drained as necessary. This work flow describes the process for notifying the Operations Tagging Authority of the need for a Clearance Order.

Assumptions

This flow is for Controlling Organization Clearance Order or for the "Authorized Worker Lock and Tag" without Controlling Organization Clearance Order.

Policies

The Planner is required to provide the information necessary to describe the conditions required to perform the work. For instance, for work to replace a solenoid valve on a water system, the system must be drained, vented and the electrical supply to the solenoid must be de-energized.

Gaps

- Issue #140 Hold Status – Responsible
This is a required field. Determine by procedure how it will be used. Develop a list for the procedure of valid entries. Suggest Ops, ESQ, ...

1 Describe Clearance Requirements

Add a CR entry to the "permits" Section of the Requirements/Permits panel (M105). Use an OLE attached file to describe the clearance requirements (i.e. de-energized, drained, breaker removed, etc).

Cross Reference: M105

Procedures: HNF-IP-0842 Vol V Sec 7.1

2 Place Clearance Order hold on Work Order Task (Issue #140)

Place a Clearance Request Hold on the Work Order Task. This is performed by using a 'more detail' on the Work Order Task status

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description field to navigate to the Status Tracking panel M130.
Select the 'Hold Processing' folder and enter CR in the Hold Code field. Enter the initials of the Operations Engineer on the EWP team in the Responsible field if appropriate. Enter the Operations tagging authority ID in the Send To field.

Cross Reference: PassPort Panel M100, M130, M131

Procedures: HNF-IP-0842 Vol V Sec 7.1

W111 - Request Clearance from Operations

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Flow 1

RPP Work Management

W120: Approve Work Order

Section 3a — Work Flows

Cross Reference: X020, M100

Procedures: HNF-IP-0842 Vol. V, Section 7.1

Overview

This work flow describes the process for routing a Work Order for approval and the approval process.

Assumptions

Expedited (Routine) work may be approved by the Planner.

Policies

The routing of a Work Order is unique to the work described. The Planner is responsible to ensure the required personnel are included on the Work Order routing for approval.

Gaps

None

1 Route Work Order for Approval

All Work Orders (except Expedited) require routing for approval. The Planner uses Option 1 on the Work Task Outline Panel M100 to navigate to the 'Attached Route List' window. The planner lists the required approval routing for the work order. Generic Route lists will be created which may be selected and then modified by the planner. After the routing is defined, save and exit to return to M100. Use Option 2 to send the routing for approval.

EWP work will require additional routing to selected team members

Cross Reference: PassPort Panel M100

Procedures: HNF-IP-0842 Vol. V, Section 7.1

2 View AAA

Upon logging onto PassPort, all users should access the 'Action, Awareness, Alert' panel X020. Any Work Orders which have been routed to the user for information or action will appear on this panel. Work Orders that require the user's approval will be highlighted red. The user can select the Work Order to review and press enter. The Work Order is displayed. If an approval is required, Option 3 will be available.

3 Process Work Order

Upon review of the Work Order, the reviewer has 3 options.

- Return the Work Order to the Planner:
If the Work Order plan is not acceptable and the Planner needs to make changes or add information, use Option 4 to 'Return Work Order to Planner' to navigate to panel M114. Enter the reasons for returning W/O to planner.
- Request Cancellation:
If the Work Order plan is completely incorrect, not funded, is no longer necessary or is a duplicate, use Option 7 to 'Request cancellation of Work Order Task(s)' to navigate to panel M114. Enter the reasons for requesting that the Work Order or W/O Task(s) be cancelled. If only selected tasks on the work order should be cancelled, then the tasks which should not be cancelled must be removed from M114. This is done by selecting the tasks to remove from the panel (tasks **not** to be cancelled) and pressing the delete button. The PassPort ID of the person who validated the work should be entered into the 'Responsible' field. The Planner's ID is defaulted, remove the planner's ID and enter the person's ID who validated the work.
- Approve the Work Order Plan:
If the Work Order plan is acceptable use Option 3 to 'Approve the Work Order'.

Cross Reference: PassPort panel M100 and M114.

Procedures: HNF-IP-0842 Vol. V, Section 7.1

4 Evaluate Cancellation Request

Upon logging onto PassPort, all users should access the 'Action, Awareness, Alert' panel X020 (AAA panel). Any Work Orders that have been routed to the user for information or action will appear on this panel. If the User has been sent a Work Order (Tasks) to Cancel, it will appear on the AAA panel. Select the Work Order to review for cancellation and press enter to navigate to the Work

Order (Tasks). Review the Work Order (Tasks) marked CXCL/REQ. If it is appropriate to cancel the Work Order (Tasks), from the 'Work Order Outline' panel M100, select the tasks to be cancelled and perform Option 9 to cancel the Work Order (Tasks). If it is not appropriate to cancel a Work Order (Task), from the 'Work Order Outline' panel M100, select the tasks which should not be cancelled and perform Option 8 to 'Deny Request to Cancel Work Order (Tasks)'. Performance of Option 8 will navigate the user to the 'Task Notification Request' panel M114. Enter the reason why the cancellation request was denied. The PassPort ID (Hanford ID) of the person who should be notified of the denial of the cancel request should be entered into the 'Responsible' field (the Planner's ID is defaulted). The sender of the request to cancel the Work Order (Tasks) is displayed on the 'Task Notification Request' panel M114.

Cross Reference: PassPort Panel M100, M114, X270

Procedures: HNF-IP-0842 Vol. V, Section 7.1

5 Review By Planner

Upon logging onto PassPort, The Planner should access the 'Action, Awareness, Alert' panel X020 (AAA panel). Any Work Orders that have been routed to the Planner for further planning/corrections will appear on this panel. Select the Work Order from the AAA panel and press enter to navigate to the Work Order. The planner should perform Option 13 'View W/O Notification Requests' to navigate to the 'Task Notification Request' panel M114. The Planner can then review the comments made by the reviewer and make modifications to the work order as necessary. When completed, the Planner routes the Work Order for approval as described in step 1 above.

Cross Reference: PassPort panel X020, M100 family, M114.

Procedures: HNF-IP-0842 Vol. V, Section 7.1

W120 Approve Work Order

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RPP Work Management

W130: Schedule Tasks

Overview

Scheduling of the PassPort Work Order Tasks is performed on Primavera P3. A Download/Upload process is used to update P3 with the daily progress and newly approved Work Order Tasks. This flow describes the process for placing PassPort Work Order Tasks on the Daily Schedule.

Assumptions

The Short-Range schedule is a derivative of the Integrated Schedule. The Short-Range Schedule represents a work window of 1-2 weeks (to be determined). Work Order information can be passed to either schedule via the Download/Upload process based on the CPM project (network id).

The CPM Project code in PassPort and the P3 Network ID must match exactly. The P3 Network ID is limited to 4 characters so the CPM Project code in PassPort must match (4 characters).

The integrated schedule includes all the activities in the FY that are identified, funded and authorized for performance of field activities. Resource load for the integrated schedule is no greater than 60% of capacity to leave room for daily unplanned work.

The following additional data must be entered into PassPort and in P3 such that the values are identical.

Crews
Shifts
Calendar
Resource Codes

A guideline must be prepared to describe the setup required for a scheduler to pass information between PassPort and P3. Each scheduler's PC must be setup with a standard File transfer setup for the download/upload process. This guideline must also provide guidance to coordinate the download/upload process when more than one scheduler is involved.

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PRMBATCH.exe is a Primavera supplied program that must be installed on the scheduler's PC in order to load PassPort data to P3.

Policies

All RPP work shall be included in a TBR. Each TBR contains a cost estimate and a schedule for the work included in the TBR.

Gaps

- Issue #80 Outage Planning Resolution
An outage schedule needs to be developed in order to utilize the capability to schedule system/equipment maintenance by outage type (tank farm TY or SY or VTP). This is not currently done at RPP. It needs to be discussed and committed to by senior Operations management. This relates to the use of the Outage block on the Work Order panel M100.
- Issue #157 Activity Codes for Scheduling
Activity code passed between P3 and PassPort must be standardized to provide consistent planning in both systems
- Issue #156 Activity Codes
All schedules used for the PassPort interface will be under the same Activity code structure.
- Issue #154 PeopleSoft HR Interface to WMS
Fields required by PassPort Scheduling and other WMS modules are not activated through the PS/PP interface.
Data may not be available or may be in the wrong format.
Note: Mona Morgan did an initial interface Map. May be able to use that as the starting point.
- Issue #120 Work Order Schedule before Ready to Work
Currently work orders must be in "Ready to Work" status before they can be scheduled in PassPort. We need to put Work orders on the schedule anytime after the W/O has been created.

RPP Work Management

Section 3a – Work Flows

1 Maintain Integrated Schedule

The TBR schedules for physical work at the RPP are combined into the Integrated Schedule of field work activities. This schedule is maintained by RPP Scheduling

Cross Reference:
Procedures:

2 Identify Work Order Tasks to Schedule & Download

In order to utilize the Critical Path Method (CPM) Download to P3, a list of tasks to be downloaded must be identified with the P3 Network ID. Identification of the CPM network is performed on the Electronic Backlog panels M200 and M201. The Electronic Backlog panel M200 is used to define the filter criteria used to obtain the list of work orders that will be assigned to a CPM schedule (P3 network). After the selection criteria has been entered, the View Results button is used to display the resulting list on the CPM Interface panel M201.

On the M201 panel, enter the CPM Project identifier for the P3 network for the daily schedule. Individual work orders may be examined using More Detail. Work Orders that should be down loaded to the daily schedule should be selected. Option 2 'Apply Entered Values to Selection' is used to link each selected task to the daily schedule. If it is desired to link all of the tasks on the list to the daily schedule, Option 1 'Apply Entered Values to All Tasks' may be utilized.

Cross Reference: PassPort panel M200, M201
Procedures: HNF-IP-0842 Vol. V, Section 7.1

3 Download Tasks to P3

PassPort Work Order Task information (new tasks and progress updates) is downloaded to P3 in a two step process.

- On the Schedule Backlog CPM Interface panel M202, enter the code for the daily schedule in the CPM Project field and press enter. All tasks that were identified as tasks to update the daily schedule will be listed. Individual tasks may be selected to or Option 1 'Select all Tasks' to choose the task information to download. Option 2 'Portal to send tasks to Primavera' is used to create the download file.

- The Primavera program PRMBATCH.exe is used to download the file created by PassPort to P3. The P3 network for the daily schedule must be closed while this program is run.

Cross Reference: PassPort Panel M202. Primavera program PRMBATCH.exe
Procedures: HNF-IP-0842 Vol. V, Section 7.1

4 Manipulate P3 Schedule & Create File

After the PassPort information has been downloaded to P3, the scheduler can open up the daily schedule network and manipulate the schedule as appropriate. The schedule will be updated with progress from previously scheduled tasks, new tasks may have been added, actual start and finish dates will be passed, etc. When the schedule has been adjusted based on the downloaded information, an export file is created from P3. That file will be used to load the new schedule dates and crew assignments to PassPort.

Cross Reference:
Procedures: HNF-IP-0842 Vol. V, Section 7.1

5 Upload to PassPort

After the daily schedule has been updated in P3 and the export file created, the PassPort panel Schedule Backlog / CPM Interface panel M202, Option 4, "Portal to Recv Primavera Sched Tasks" is used to update the new crew assignments and schedule dates to PassPort. The update will reassign the tasks to the appropriate crews and the new schedule dates. Material Request dates will also be adjusted as necessary

Cross Reference: PassPort panel M202
Procedures: HNF-IP-0842 Vol. V, Section 7.1

W130 Schedule Tasks

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W140: Pre-Work Task Activities

Overview

After the work is scheduled on the daily schedule. There are several parallel efforts which must be accomplished in order to ensure that a ready to work package is sent to the field in a timely manner on the scheduled date. This work flow describes the activities required to ensure the package is ready to work. Parts and materials are available, the package is printed and assembled, the work is authorized, permits have been approved and tags have been hung as necessary. Activities on this flow may not necessarily happen in the same order as shown on the flow diagram. Many activities are performed in parallel.

Assumptions

A partially completed job is automatically rescheduled by PassPort for the next day.

Policies

Only Operations can change a Work Order Task status to *Working*. This is the signal to the implementing organization that Operations has authorized the work. Maintenance and Operations Supervisors can move a task from *Working to Ready*. The work must be re-authorized prior to starting work again. The status of all jobs from the daily work schedule will be updated prior to commencing pre-job activities for work to start later.

Gaps

- Issue #158 Administrative Process for Hold Create/Define the process for administering Hold Processing for work order tasks.
- Issue #311 Determine how to release shop work. Shop work does not require operations approval or release. How do we handle this process?

1 Review Scheduled Work

The work Supervisor should review the daily schedule for the coming week from the Daily Activities Schedule panel M210. For each Work Order Task, the Supervisor must perform the following.

- Examine the resource requirements for the tasks and verify resources will be available. If not, contact the scheduler to reschedule the Work Order Task.
- Review the work instruction. Any questions brought up during the plan review should be discussed with the Planner.
- Review the permits that will be required to perform the work on the Permit/Requirements panel M105.
- Verify that the materials ordered for the task will be available by pressing the 'QTY Status' button on the Material Request panel M105.
- Pre-assign members of the crew to the work so that they can also preview their upcoming work schedule. Assignment is performed by selecting the Work Order Task on the Daily Activities Schedule panel M210 and pressing Enter to navigate to the Personnel Assignment panel M212. The personnel on the crew are listed. For each member of the crew who will be assigned to the Work Order Task, enter the expected hours.
- Change the Task status to 'Ready' by selecting the task on the M100 panel and using Option 5 'Set Task(s) to Ready'. A ready status indicates to Operations that the task has been reviewed by the implementing organization prior to Authorization (setting the task to 'Working' status)

Cross Reference: PassPort panel M210, M212

Procedures: HNF-IP-0842 Vol. V, Section 7.1

2 Review Tasks for Authorization

Operations determines what work should be authorized from the daily schedule. This authorization should be performed prior to the workday start (preferably the night before). The daily schedule is reviewed from the Daily Activities Schedule Review panel M215.

Enter the Schedule Date Range to review. The Operator must select and enter to navigate to a task on the schedule. The Operator can then review the task to determine if it is appropriate to Authorize the task for work the next day.

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Operations must review each Work Order Task listed for the next day's schedule as follows:

Check each activity for Clearance Order requirements. Prior to placing a task in *Working* status with no holds ensure Clearance Orders are hung. When a Lock&Tag is hung by Operations, they should enter the L&T number on the Permits panel M105.

- If the task is in *Working* status, go to M223, Shift Turnover Log and review the Shift Log. Determine if the task can remain in *Working* status.
- If the task is in *Ready* Status, check the task, determine that necessary holds have been satisfied and change the task status to *Working*, if the task is to be authorized for work.
- If the task cannot be worked until operations is contacted, place a hold on the task. Select More Detail on the Status field of the task. On Panel M130, select the Hold Processing folder and enter the hold.
- If the task cannot be worked and needs to be rescheduled, ensure the status is set to *Ready* and notify the scheduler.

Cross Reference: PassPort Panels M215, M100 family
Procedures: (Issue #158)

3 Print Work Order Task Package

From Report and Batch Functions choose panel P211 Work Order Package Print. Enter the Work Order number (Panel MC11)

- Select the task packages you want to print
- Place an X in the master field
- Click on the Print button
- Review documents section and print or retrieve documents.
- Obtain Permit forms as necessary (They will print with the work order if the planner OLE attached the form)
- Place in a work package folder.

Cross Reference: PassPort panel P211

Procedures: HNF-IP-0842 Vol. V, Section 7.1

4 Prepare Clearance Order

During the planning of the Work Order Task, the Operations Tagging Authority was sent a AAA message to prepare the Clearance Order for the work described on the Work Order Task. The Operations Tagging Authority should be working from the daily schedule to determine what L&T are required for the next day. Operations plans and executes the Clearance Order as required. (See Work Flow W160)

Cross Reference:

Procedures: HNF-IP-0842 Vol. V, Section 7.1

5 Job Preparation

The Workers assigned to the Job stage special tools, equipment, and materials for the job using the panels as described in Work Flow W140.6.

Cross Reference:

Procedures: HNF-IP-0842 Vol. V, Section 7.1

6 Verify "Working" Status

Prior to performing the Pre-Job Briefing, the Supervisor must ensure that the Work Order Task has been Authorized. The Recording Daily Work Progress panel M230 is the Supervisor's base of operations for the daily work. From this panel the Supervisor can report progress, delay codes, access the closeout panels for the Work Order Tasks and record labor hours. When the Supervisor accesses the panel and enters the crew code for his crew, a list of Work Order Tasks scheduled for that day is listed. Authorized jobs will be in 'Working' status. Jobs with an associated 'Hold' will have the Status code highlighted red. In order to review the Hold Code, More Detail on the Status code highlighted red to navigate to the Status Tracking panel M130. Access the 'Hold Processing' tab to see the Hold Codes. If a Hold is the Supervisor's responsibility to clear, enter the data and time on the Hold Code line and press enter. If someone else is responsible to lift the code, take action as necessary. If the Work Order Task status is highlighted red and it is in the Authorized status, it indicates that Operations wants an action to be taken prior to starting work. Check the Hold Code to determine the

proper action. Operations will clear the code after the action is taken.

Cross Reference: PassPort panel M230, M130 and M131
Procedures: : HNF-IP-0842 Vol. V, Section 7.1

7 Verify Latest Rev of the Docs

Review the attached documents on the Work Order Task to ensure the documentation is complete and is latest revision.

Cross Reference: Document Tab on M100
Procedures: : HNF-IP-0842 Vol. V, Section 7.1

8 Pre-Job Brief

After the Work Supervisor has verified that the work is authorized, the Pre-job Briefing for the work will be performed prior to sending the craft out to perform the work. The Work Supervisor will maintain an attendance roster and pre-job briefing form until the completion of the job. The Date and Time of the Pre-Job Briefing should be the first entry in the Work Close out Comments Section. When the Pre-Job Briefing is completed, the Work Supervisor should access the Task Completion panel M301 by selecting the Work Order Task line from the Recording Daily Work Progress panel M230. Pressing the 'Comments' provides navigation to the Comments panel. Enter the code for Pre-Job Briefing comments and enter the comments.

Cross Reference: PassPort panel M100, M230, M301
Procedures: : HNF-IP-0842, Vol. V, Section 4.1.

W140 Pre-Work Task Activities (Not Chronological)

Flow 1

W140.5: Job Preparation

Overview

This work flow describes the activities that are performed by the worker in preparing to perform the work as described on the scheduled Work Order Task.

Assumptions

Workers and Supervisors are assigned to specific work activities ahead of time and have access to view the jobs on the 2-week rolling schedule

Policies

None

Gaps

None

1 Worker Preview Scheduled Work

The worker can check the next day's assignment on the Individual Daily Assignments panel M220. Enter the date and HID and press enter. The next day's Work Order Task(s) will be listed.

Cross Reference: PassPort panel M220

Procedures: : HNF-IP-0842 Vol. V, Section 7.1

2 Gather Equipment

On the Tools & Equipment panel M106, special tools and test equipment will be listed by the planner. This information is also available on the printed work order. The worker should identify and gather the tools and test equipment needed to perform the work. Also listed on this panel is any plant equipment that has been reserved for use for this job, such as a Crane or Breathing Air Compressor. Verify that this equipment is available and ready for use.

Cross Reference: PassPort Panel M106

Procedures: : HNF-IP-0842 Vol. V, Section 7.1

3 Gather Materials

On the Material Request panel I010 associated with the Work Order Task, verify that the materials are staged or available for the job. If appropriate, gather the materials at this time.

Cross Reference: PassPort Panel I010

Procedures: : HNF-IP-0842 Vol. V, Section 7.1

4 Permits/Access/Dosimetry

Permit requirements are listed on the Permit/Requirements panel M105. The permits required will also be listed on the printed Work Order Task package. If a RWP is required, it will be listed. Review the RWP requirements and get dosimetry from the ACES station as required. Process any other permits as required as preparation for performing the Work Order Task.

Cross Reference: M105

Procedures: : HNF-IP-0842 Vol. V, Section 7.1

W140.5 Job Preparation

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Flow 1

W150: AJHA, Permits, Requirements

Overview

An important element of the Work Planning process is the performance of a Automated Job Hazard Analysis (AJHA). The AJHA is performed and documented in AJHA tool. The AJHA helps the planner identify work hazards and provides a tool for gathering the work requirements and Permits necessary for the performance of the work. The AJHA tool can be OLE attached to the Work Order Task for convenience of the Planner. Results of the AJHA will become an integral part of the Work Order Task plan work instructions and permits

Assumptions

There will be an AJHA for each Work Order Task package.

Policies

The PassPort Work Order Task number will always be listed on the AJHA. The AJHA number will be listed on the Work Order Task. This provides a cross-reference.

Gaps

- PassPort and the AJHA tool are not integrated. While the OLE functionality to link the tools is available, more work is necessary in order to integrate the tools. Desired functionality includes:
- Allow PassPort to activate AJHA and pass it the Work Order Task number.
- Allow PassPort to receive information from AJHA (Permits, requirements, etc.)
- OLE Link to Site Forms for the Permit forms. AJHA and PassPort should link to the same form rather than build the form in the AJHA tool and reference in on the Work Order Task..
- Issue #100 Access to standard site forms
Need a consistent, universally used procedure/application and location to provide access to site forms.
AJHA contains site forms, PassPort needs the forms.
ProchInfo contains forms, JetForms contains forms, HLAN contains forms.
Need a single application (probably Jetforms) that is OLE compliant which houses all forms (at least templates).

- Issue #118 AJHA integration
Determine what information should/can be passed between PassPort and AJHA. Look into OLE and ODBC capabilities.
- Issue #119 Permits and Forms for AJHA
Determine how to provide permits and forms to the Work Order Task (panel)
- Issue #124 Forms Management
Forms in AJHA should be Available to any external application. Moving forms to Site Forms may be a solution.
- Issue #165 AJHA 'Requirement' complex code
During the work order planning, usually an AJHA is performed. The business process requires that the work order number is entered into AJHA and that the AJHA number is entered onto the work order task. It was decided that the best place to put it was on the M105 panel under 'Requirements'. This requires that an AJHA Requirement complex code needs to be created.

1 AJHA Hazard Assessment

Perform the Automated Job Hazard Analysis Hazard Assessment. Some work does not require an AJHA. If a new AJHA is not required note the standing AJHA on the work order task plan.

Cross Reference: AJHA Tool

Procedures: : TBD

2 Check AJHA Inventory

Check the AJHA tool to determine if a new Job Hazard Analysis is required. If a JHA has already been performed for the work to be planned, then another JHA is not necessary. Refer to the original JHA on the Work Order Task Plan.

Cross Reference: AJHA Tool

Procedures:

3 Fill in Task Information

Fill out the AJHA with the pertinent information about the work to be planned. Enter the PassPort Work Order number on the AJHA. Enter the Work Order Task number if the AJHA is for an individual task on a Work Order.

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Cross Reference: AJHA Tool
Procedures:

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4 Identify Hazards

In the AJHA tool, navigate to the Hazards section and select the hazard from the left window, click on Yes or No for each hazard listed. Go through and address all hazards listed in AJHA.

Cross Reference: AJHA Tool
Procedures:

6 Review Lessons Learned

AJHA lessons learned should be reviewed for similar work and incorporated into the AJHA for this work activity.

Cross Reference: AJHA Tool
Procedures:

5 Build Controls

From the Identify Hazards screen, press the "Select Controls" button. Validate that the controls listed are appropriate for the work.

Cross Reference: AJHA Tool
Procedures:

7 Fill Out Forms & Permits (Issue #119)

The AJHA tool will identify the Permits required based on the hazards identified. Review and complete the permit forms as required.

Cross Reference: AJHA Tool,
Procedures:

8 Check Involvement

The AJHA tool will identify the organizations to involve in the work planning. Review the involvement required. Identify personnel from the required organizations and notify them to request their review.

Cross Reference:
Procedures:

9 Finalize AJHA

Review items listed as required for completion. AJHA coordinator uses the "Finalize AJHA" screen and works issues until complete. When done, click Complete AJHA, this changes status to AJHA Complete/Work not complete, and the coordinator can then lock the AJHA record.

Cross Reference: AJHA Tool
Procedures:

10 Record AJHA Information in W/O Task

Record AJHA item # ID in PassPort Work Instructions.

Record Controls from the Job Hazard Analysis in the Work Instructions.

The Permits required must be listed on the Permits and Requirements panel M105 on the PassPort Work Order Task.

Cross Reference: PassPort Panel M105
Procedures:

W150 AJHA, Permits, Requirements

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W150 AJHA, Permits, Requirements

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Flow 2

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tags being hung. This is usually referred to as a shift manager hold.

Cross Reference: HNF-IP-0842 Vol V Sec 7.1
Procedures:

2 Approve Clearance Order
When the W/O task appears on the daily schedule, Operations reviews the work done in step 1 and determines what steps must be taken to approve the clearance order, hang the tags, and approve the work.

Cross Reference: HNF-IP-0842 Vol V Sec 7.1
Procedures: HNF-IP-0842 Vol II Sec 4.9.1

3 Hang Tags
Operations manipulates the equipment in order to create the conditions necessary for the performance of the work.

Cross Reference: HNF-IP-0842 Vol II Sec 4.9.1
Procedures:

4 Perform Independent Verification
Independent verification of the position of all equipment manipulated when hanging a Clearance Order is required. This step is usually performed by separate Operations personnel who follow after the person hanging the Clearance Order.

Cross Reference: HNF-IP-0842 Vol II Sec 4.9.1
Procedures:

5 Release C/R Hold on Work Order Task
Once the Clearance Order has been hung and independently verified, Operations may release the Hold on the Work Order Task. Navigate to the Work Order Outline panel M100, More Detail on the Work Order Task status to navigate to the Work Order Status panel M130. Select Hold Processing tab to navigate to the Status Tracking Hold Processing panel M131. Release the 'CR' Hold by

W160: Prepare Clearance Order

Overview

During Work Planning, the Planner determined the condition of the equipment needed to perform the work. For instance, to work on a valve in a water system, the limits switches may need to be de-energized, the water drained from the system, the vent valves open, a drain open, air isolated from an air actuator, etc. It is the Planner's responsibility to determine these conditions and inform Operations that a Lock&Tag is required. It is Operations responsibility to determine what components to manipulate and tag to obtain the correct conditions to do the work. The worker will perform an authorized worker Clearance Order prior to performing the work.

Assumptions

This flow is sequential, but portions of the flow may be performed in widely spaced intervals.

Policies

No New Policies

Gaps

- Issue #136 Clearance Orders
Operations will have a PassPort User ID to which all clearance requests will be sent.

1 Prepare Clearance Order & Walk Down

Operations receives a AAA from the planner that a Clearance Order is necessary to hang a Lock & Tag in order to perform the work on the Work Order Task. Operations prepares the Clearance Order to hang the Clearance Order. The Work Order Task provides the work instructions, the Clearance Request notes on the Permits and Regulations panel M105 and the Document References panel M104 contains the documents listed by the Planner. (Issue #131)

If the clearance is such that Operations decides that it is not feasible to hang the Clearance Order ahead of time, an Operations Hold may be placed on the Work Order Task. The hold is defined such that a work supervisor must talk with operations prior to the

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entering the date and time the tags were hung. The system will store the date/time and ID of the person releasing the hold.

Cross Reference:

Procedures: HNF-IP-0842 Vol V Sec 7.1

W160 Prepare Clearance Order

W170: Perform & Document Work Overview

This Work Flow describes the activities performed by the worker in order to complete the Work Order Task activities.

At this point, the work has been Authorized, a Pre-Job Briefing has been performed, the worker has gathered the necessary equipment and materials, reviewed the work package and is ready to start the work.

Initial Post-Job work and documentation is also described. These activities include statusing, clearing the Clearance Order, post work briefing, documentation of the work, recording lessons learned, post work review by the work supervisor and operations and an Enhanced Work Planning review of the completed work as applicable.

Assumptions

None

Policies

No work will be performed which is in a hold status. Hold status is indicated by the status word being colored red.

Recording Daily Work Progress panel M230 and the Shift Log panel M223 must be updated daily prior to the assigned supervisor's end of shift.

Gaps

- Work Order Attributes/History Briefs Templates
 - Issue #141 Work Order doesn't print Attachments
 - Attached Work Documents are not printing with the work order.
 - Issue #147 Task Closeout - Operations
- The method available in PassPort is to mark the task as "review Required". If this is set, when the task is marked as finished by the supervisor, the status goes to H/OPS rather than FINISHED. Operations must then clear that hold before the task can be moved to FINISHED status.
- Currently the "H/OPS status" method of notification that a Job is complete would require operations to release the hold prior to

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completing the rest of closeout. This will require redefining the purpose of the operations review as it is currently. Need to identify a method of documenting notification of operations by the supervisor that does not require their action prior to continuing on with the post review and closeout.

- Issue #166 Work Order Attributes (Close-out)
Need to define History Brief Notes topic for the above categories. This will only work if we add a tab for the History brief off of M301. This solution creates History briefs for all work orders which are accessible from the Equipment/Component Data panel D030.

1 Notify Facility Manager

Prior to starting work, the Facility Manager or Operations (as applicable) must be notified that the work is starting. The Facility Manager or Operations should be aware that the work should start because it is listed on the daily schedule and has been Authorized to work. In some cases, a hold may have been placed on the Work Order Task. If there is a Hold, the status of the Work Order Task will be displayed Red. In order to determine what the Hold Code is referring to, click More Detail in the "Work Order Task Status" field to navigate to the Work Order Status panel. Use the Hold Processing folder to see the Hold Code on panel M131. This hold should be discussed at the Pre-Job Briefing.

An example of a case where the work is Authorized with a 'Hold'; The work is scheduled and Operations has Authorized the work. Because a Clearance Order is required on critical equipment, Operations wants to ensure that the equipment is taken out of service for the shortest amount of time as possible. They place a hold on the Work Order Task to inform the worker that the Clearance Order will only be placed when they show up ready to work.

Cross Reference: PassPort Panel M100, M130, M131
Procedures: HNF-IP-0842 Vol V Sec 7.1

2 Verify Clearance Order

If a Clearance Order is required for the work, the worker must perform the Authorized Worker Clearance Order.

Cross Reference:

Procedures: HNF-IP-0842 Vol II Sec 4.9.1

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3 Permits

Process any remaining permits required prior to starting the work.

Cross Reference: Printed Work Order Task

Procedures: HNF-IP-0842 Vol. V Sec 7.1

4 Perform Work

Perform the work as described in work order task. Record work progress, trouble found and the Test Equipment UTC numbers on the printed Work Order Task "Trouble Found/Work Performed" block.

Cross Reference: Printed Work Order

Procedures: HNF-IP-0842 Vol V Sec 7.1

5 Clear Clearance Order

Clear AWLT per procedure. Notify operations that this task is complete and the controlling organization L&T is no longer required for this task.

Cross Reference:

Procedures: HNF-IP-0842 Vol II sec 4.9.1

6 Post Maintenance Test

Perform the Post Maintenance Test as described in the work package. Document the results of tests on the printed Work Order Task "Trouble Found/Work Performed" block.

Cross Reference:

Procedures: HNF-IP-0842 Vol V Sec 7.2

7 Clean Up Area

Clean up area to original condition. Dispose of excess materials and any waste generated in existing satellite accumulation areas in accordance with applicable procedures.

Remove remaining Authorized Worker Lock& Tag and/or notify The Facility Manager (or Operations) that work is complete.

Cross Reference:

Procedures: HNF-IP-0842 Vol V Sec 7.1

8 Recording Daily Work Progress

The Work Supervisor is provided a list of Work Order Tasks scheduled each day on the Recording Daily Work Progress panel M230. From this panel the supervisor has access to all of the functions in PassPort that are required to report daily work progress, enter labor hours, review task plans and provide completion information.

The Recording Daily Work Progress panel M230 provides access to:

- The Work Order Outline panel M100 from which the entire work plan may be reviewed. Access is accomplished via a More Detail on the Work Order number.
- The Task Details panel M101. The individual task of the work order to be performed is accessed directly via a More Detail on the Work Order Task number.
- Task Completion panel M301. The completion information is entered on this panel. This panel is accessed by selecting the line for the Work Order Task and pressing enter (or double clicking).
- The Work Order Task Status History panel M130. The status history and the Hold Processing panel M131 are accessed via a More Detail on the Status field.
- The Work Order Info button provides the Work Order Task title and Work Order Task type.
- The Recording Labor Hours panel M231. This panel provides the ability to record the crew hours worked on an individual Work Order Task. This panel is accessed via the Labor button.

For each Work Order Task displayed on the panel, the work supervisor must enter the following:

- a) When the work is started, enter a 'P' (Partial) in the Status Code field and enter 1% in the Estimated Progress field.
- b) At the end of the shift, if the work is not completed, the work supervisor should update the percentage in the Estimated Progress field and enter the remaining duration

in Hours Remain field. This will feed the P3 schedule so that the schedulers can adjust the schedule accordingly.

- c) Each Work Order Task listed and not started is Deferred. The work supervisor must enter a 'D' (Deferred) in the Status Code field and prompt on the Delay Code field and select a code which explains why the job did not start. This will feed the P3 schedule so that the schedulers can adjust the schedule accordingly.
- d) The work supervisor must enter the crew labor hours for each Work Order Task on the schedule that was worked.
- e) Daily work progress must be entered (Issue #141, 143, and 166)
- f) A complete description of the work completed must be entered at completion of the work order task (Issues #141, 143 and 166)
- g) The work supervisor may use the Shift Turnover Log panel to record information about each work order task on the schedule.

Cross Reference: PassPort Panels M100, M101, M230, M231, M301.

Procedures: HNF-IP-0842 Vol V Sec 7.1

8 Finish & Document W/O Task

Supervisor marks the task as finished:

- a) From Work Task Outline (M100), Click the "Completion" button.
- b) On Panel M300 Task Completion, select the task to be finished.
- c) For PM Work Orders, verify that the Finish Date is the date the PM was finished.
- d) Place a hold on this task. If applicable, set hold to *Waiting for EWP Post Review*. Send hold to the planner. Note: Hold must be placed before setting the task to finished.
- e) Choose Option 5, Finish Unfinished Task
- f) Notify Operations the task has been completed. (Issue #147)
- g) When applicable, (if status is H/OPS) request Operations to release the hold

Cross Reference: M100, M800

Procedures: HNF-IP-0842 Vol V, Sec 7.1

9 Operations Review

When notified by the work supervisor that the work is done, Operations performs required activities to assure that the equipment is operable. Access the Work Order Outline panel M100 and bring up the work order. Check the Permits panel for the Work Order Task to determine if a Clearance Order was performed. If so, start the process for clearing the tags. If the task is currently listed as H/OPS, the operator navigates to the Work Order Completion panel by pressing the 'Completion' button. Select the task and use Option 10 to 'Finish Unfinished Task'.

Cross Reference: PassPort Panel M100,

Procedures: HNF-IP-0842 Vol V, Sec 7.1

10 Post Job Debrief

Crafts and Supervisor discuss the work performed and document the work performed and lessons learned. Supervisor enters Lessons Learned under the Attribute button of panel M301, Task Completion, using the Post Job Review template.

Supervisor verifies that the work delay reasons on the printed Work Order Task are accurate.

Cross Reference:

Procedures: HNF-IP-0842 Vol V Section 4.2

11 EWP Post Review Meeting

The Field Work Supervisor assembles the planning team and workers in a Post Review Meeting to discuss lessons learned, CPLs, identify new tasks, and anticipated vs actual experiences for this Work Order Task. Minutes from the meeting are recorded on panel M300, Task Completion, Attributes using the Alara Post Review template. When Complete, the Field Work Supervisor should remove the EWP Post Review hold.

Cross Reference: PassPort Panel M300, X270

Procedures: HNF-IP-0842 Vol V, Sec 7.1

W170 Perform & Document Work

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W170 Perform & Document Work

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W180: Complete Work Order Overview

This Flow describes the administrative tasks to complete and archive the work order.

Policies

The date of the PM completion is the date the supervisor recorded on the last task finished.

Gaps

- Issue #144 History brief panel doesn't work right now. (Indus)
- Issue #166 Work Order Attributes (Close-out)
Need to define History Brief Notes topic for the above categories. This will only work if we add a tab for the History brief off of M301. This solution is better because it creates History briefs for all work orders which are accessible from the Equipment/Component Data panel D030.

1 Admin Closeout

Clerk receives the Work Order Task Package and enters the work order number on the Work Completion panel M300. Select the task and enter to navigate to the Work Order Task completion panels. The clerk performs the following:

- If there are delays entered on the work package, access the 'Delay Analysis' folder and verify or enter the delay codes for the delay reasons recorded on the printed work order.
- Transfers information from the printed Work Order Task "trouble found/work performed" block to the appropriate areas in the Work Completion Panels.
- Records the UTC's for the Test Equipment on the 'Calibration Instruments' folder. Enter the UTC number and the check out/in dates. Calibration Instrumentation information is included on the printed task order section "trouble found/work performed".
- Incorporates red line changes into the Work Order Task.
- When the status of the work order is Await/C, the clerk checks all tasks and determines if any task is still working or has a hold active. When no task is active or on hold status, the clerk sets the status of the work order to complete.

Cross Reference:

Procedures:

2 Route For Information (non-EWP)

The Engineer(s) must be notified of work order completion for Work Orders that have not been through the EWP process. Access the Work Planning Outline panel M100. The Cog Engineer is listed on the Work Order Attributes accessed via the 'Attributes' button. Perform Option 1 to attach a route list to the Work Order. Prompt on the PassPort field and select the Cog Engineer's ID. Enter 'I' in the Alert Type field. Press the 'Info Submit' button to send an AAA message to the Cog Engineer.

Cross Reference: M100 Options 1. X270

Procedures:

3 Archive Printed Package

Remove all procedures, drawings and other documentation, etc. that do not contain entered data from the work order package. Place the remainder of the work order package in a file and archive in accordance with HNF-PRO-222 procedure.

Cross Reference:

Procedures: HNF-PRO-222, HNF-IP-0842 Vol. V, Sec 7.1

W180 Complete Work Order

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W190: Scope Change

Section 3a – Work Flows

Overview

After a Work Order is approved, changes to the Work Order fall into three categories: Editorial Changes, Scope Changes, and Deletion of an unneeded tasks on a Work Order. The Process for each is described in this Work Flow.

Assumptions

Policies

Editorial changes are implemented by redlining the printed Work Order Task package or online in PassPort. If the editorial change is made online to an OLE attached Word document, the redline/strikeout functions of the word processing software should be utilized to mark the change. The process for editorial changes is described in this Work Flow.

Scope Changes are accomplished in PassPort by addition of a new task to the work order. The original task that is no longer viable can then be dispositioned by canceling or finishing (if appropriate depending on in progress work circumstances). The task backgrounding functionality of PassPort allows easy copying of the original task to enable the new task to be quickly planned.

Gaps

- Issue #146 Scope Changes
What is the definition of Major Scope Change, Minor Scope Change and Editorial Changes
- Issue #167 Cancellation Approval
Routing for Cancellation of a Work Order Task
In order to cancel a work order task, the user picks option 7 from M100 to 'Request Cancellation'. This navigates the user to the Task Notification Request panel M114 where the user has to choose identify the task(s) to be cancelled, explain why the task(s) should be cancelled and then enter the responsible person in the Responsible field. The person defined as being 'responsible' will receive an AAA message to review the cancellation request. That user must be given security to approve the cancellation. The issue is that the person requesting the cancellation will not necessarily know who can approve cancellation of the Work Order task.

PassPort is really set up such that the Planner is expected to approve the cancellation of the work order task. The planner id is defaulted into the "Responsible" field on the M114 panel.

1 Determine Type of Change

Change may be Scope, Editorial, or Cancellation. Determine which process applies.

If the task is to be cancelled:

From the Work Task Outline panel, M100, perform Option 7 to 'Request Cancellation'. On Panel M114, Task Notification Report, delete all tasks not to be cancelled from the list at the bottom of the screen.

In Action Notes, describe the reason for cancellation.

In the Responsible field, enter prompt and select the HID for the person responsible for approving the cancellation of the Work Order Task(s) (Issue #167).

Save and Exit to complete the process.

Cross Reference:

Procedures: HNF-IP-0842 Vol V sec 7.1

2 Red-line and Initial

Red-line required changes to the Work Order Task Initial and date the red-line changes. This may be performed online if the Master Work Order Task package has not yet been printed. Use the word processor software redline/strikeout functions to mark the changes. Place () and inside place initials of person working the change and the date behind each red line change.

Cross Reference:

Procedures: HNF-IP-0842 Vol V sec 7.1

3 Place Equipment in Safe Condition

If the work is in progress and a scope change is required, there will be a delay until the new work order task can be prepared and approved. Place the equipment in a safe condition and notify the Work Supervisor and Operations (Facility Manager if appropriate).

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Identify reason for stopping work on the printed Work Order Task in the Work Delay Reason section.

Cross Reference:

Procedures: HNF-IP-0842 Vol V, Sec 7.1

4

Background New Task to Work Order

Since a scope change is necessary, the easiest way to create an additional Task on the Work Order is to background the existing task. This will copy all of the information from the work order which is to be replaced. The new task will be created in Plan status so that new work instructions can be attached and any other details may be changed.

- Go to the Work Task Outline panel M100.
- Access Work Order Task Backgrounding panel M115 by choosing Option 15.
- On the Work Order Task Backgrounding panel M115, the original Work Order number is defaulted into the filter criteria.
Note: If it is desired to copy a task from another work order task, then use the filter criteria to find the other work order task, then use the filter criteria to find the other work order task to copy from the original work order (either click and enter or double click)
- Select the task to copy from the original work order (either click and enter or double click)

The result is an additional task is added to the original Work Order. This new task is a duplicate of the task selected. The new task is created in Plan status. The planner can now make changes as necessary per the normal Work Flow.

Cross Reference:

Procedures: HNF-IP-0842 Vol V, Sec 7.1

5

Determine Scope of Change

(Issue #146)

Changes may, based on the graded approach, require Enhanced Work Planning Team be assembled to assist the planner with the new task planning. See Work Flow W110.4 & W110.5.

Cross Reference:

Procedures: HNF-IP-0842 Vol V, Sec 7.1

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6 **Review for Cancellation**

Note: If the W/O has only 1 task, cancelling the task will also cancel the W/O.

Operations will receive an AAA message requesting cancellation of a Work Order Tasks that remove funded workscope.

- Access the Action Awareness Alert (AAA) panel X020. Select the task to be reviewed for cancellation.
- From the Work Task Outline panel M100, select the task in CNCL/REQ status and use Option 14 to review the Task Notification Request panel M114. Save and exit to return to the Work Task Outline panel M100. Review the work order as necessary.
- If the task is to be cancelled, select Option 9 to Cancel Work Order (Task).
- If the task should not be cancelled, select Option 8 to Deny Request to Cancel W/O (Tasks). Enter reasons for denial of the cancellation request on Action Notes on Panel M114, Task Notification Request. Enter the requestor ID in the Responsible field. Save & Exit.

Cross Reference:

Procedures: HNF-IP-0842 Vol V sec 7.1

RPP Work Management

W210: Preventative Maintenance Requirement

Overview

In PassPort, Preventative maintenance is called "Predefined Parameters". Predefined Parameters are utilized to set up and manage tasks done on a predetermined frequency. This frequency can be based on calendar dates or upon an incremental increase in a reading. Tasks at Hanford that are performed on an predetermined frequency include:

- Functional Testing
- Calibrations
- HP Surveillance
- Surveillance Tests
- Preventative Maintenance
- Ticklers

Assumptions

All tasks that are listed as Predefined Parameters that should appear on the daily schedule will generate a Work Order Task. Note: In order to generate a Work Order Task, an authorized Model Work Order Task must be attached to the Predefined Parameter.

Policies

- Calendar frequency Calculation Types are based on a fixed anniversary (Type C) or on a fixed frequency (Type D). Fixed anniversary calculations result in a due date that is based on the last due date plus the frequency. Fixed Frequency calculations result in a due date that is based on the last performed date plus the frequency.
- Fixed anniversary calculations will be used for most equipment preventative maintenance and testing.
 - Fixed frequency calculations will be used for preventative maintenance and testing equipment that have regulatory requirements based on the last completed date with no allowance for grace period.

While Panel D082 "Look Ahead" allows the user to change PM dates. The following policies apply to Dates in the PM module:

- Only the engineer can move the Late Date beyond its original Late Date
- Any Deferral of a PM may only be performed by the responsible Equipment Engineer.

Gaps

- PM RQ W/O Status (Issue #151)
PM W/O can be generated in either "ready" or "plan" Status. What are the criteria for determining which status the W/O is generated in? Affects W110 (Work Management) and Scheduling
- Issue #150 PM W/O Generation Process
What is the lead time to generate PM W/O for planning from the batch process?
- Issue #149 Data Sheet Storage and Management
Data sheets are currently in JCS. Determine the best method of storing, managing and linking datasheets to PassPort. Refer to Predefined Parameters, Panel D080, Tab #4 Mandated Documents
- Issue #148 Naming Conventions
Need Naming Conventions under Preventative Maintenance for the following:
Equipment List (validate grouping)
Work Items (attach equipment lists and create items that aren't specific to equipment)
Work Items and Equipment Lists are hierarchically related (Equipment Lists in a Work Item)
- Issue #142 UTCs on calibration equipment
To link Calibration equipment used on a work order task, the equipment must have a UTC. Currently no plans are in place to assign UTCs to calibration equipment.

1

Select PM Work Against

From Panel D080, select the Work Against type. The Work Against may be an Equipment Location, a Uniquely Tracked Commodity (UTC), a Catalog ID, or a Work Item.

An Equipment Location is a location that is defined in the Equipment / Component Data family of panels (D030). A UTC may or may not be installed in an equipment location.

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A UTC is a serial numbered piece of equipment, which may be installed in more than one Equipment Location over the life of the UTC. When the Predefined Parameter relates to the piece of equipment rather than the location in which it is installed, then the Predefined Parameter should be written against the UTC.

A Work Item is a specific task that must be performed. A surveillance test used to test a system is an example of a Work Item. A work item may also be a test that is performed multiple times at many different equipment locations. The Equipment Locations affected by the Work Item may be an attached Equipment List. Work Items are defined on the Work Item panel D012. Equipment Lists are defined on the Equipment List panel D011.

A Catalog ID is a generic piece of equipment that may be installed in many equipment locations at the same time. It is not required that catalog IDs be installed. PM against Catalog IDs is generally performed against uninstalled items in the warehouse.

After the Work Against type has been entered, the fields displayed will be specific to the Work Against type chosen. Prompt on the Equipment, Work Item, UTC or Catalog ID field as displayed and use the filter criteria on the prompt panel to narrow the selection. Choose the proper item to write the Predefined Parameter against.

Once all required data has been entered on the Predefined Parameter panel D080, pressing enter will create a new PM Identification (PMID) and lock the fields. If the Predefined Parameter already exists for the item chosen, the PMID number and the work against will be displayed on the top half of the panel. Each Predefined Requirement (PMRQ) for the PMID will be displayed on the bottom half of the panel.

Cross Reference: PassPort Panels D011, D012 and D080
Procedures:

2 Create PM Requirement

Once you have displayed a work against and a PM ID number on the Predefined Parameter panel D080, a PM Requirement (PMRQ) may be created. A separate PMRQ must be defined for each task performed on a differing frequency. Up to 99 different PMRQ's can be defined for each PMID. All of the PMRQs defined for the work

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against are displayed on the bottom half of the Predefined Parameter panel D080.

To review an existing PMRQ, select the proper line and press enter. That action will navigate to the Predefined Requirement panel D081 for the selected requirement.

To create a new requirement, the responsible Engineer must perform the following tasks:

- On Panel D080, press the "New RQ" button to navigate to a blank Predefined Requirement panel D081.
- Fill in the required data; PM Title, Calculation Type and Frequency Code, or Usage Interval and Usage Unit of Measure (UOM), Alert Group, PM Category, and Due Date.
- Other important fields which are not required, but may be appropriate are: Lead Time, Unit Condition Required (UCR), and Preferred Day/Week (for frequencies greater than monthly).
- Tab 4 – Mandated Documents panel D084: Enter/Insert documents supporting this PM. If you check B/G, this item will print on the task package for the job.
- Tab 5 – Predefined Scope and Comments panel D085: Enter information about the scope of this PM. Comments will be used during the life of the PMRQ to record significant events.

A PMRQ generates work orders or adds items to a "Work List" when performance is due. To generate work orders, enter authorized model work order number in the PMRQ. If a model work order number is not entered, the item will be added to the work list of the Alert Group listed.

If the PMRQ is being revised:

- Perform an Unreviewed Safety Question (USQ) screening.
- Select Option 1, "Revise Key Fields" from Panel D081.
- Make changes as needed to Title, PM Category, Frequency Code, Calculation Type, and Status.
- Add revision comments to note what & why changes were made (further notes may be added under Tab 5 Predefined Scope and Comments panel D085).
- Complete the revision by clicking on the Enter button.
- Navigate to the Predefined Look Ahead panel D082 Tab 2 and use option 5-7 to modify Next Due, Early, Late, and Finish dates as appropriate. When modifying dates, use Option #6 to remove any scheduled PM dates before re-scheduling.

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The Engineer must review the PMRQ data against the Model Work Order to ensure that they work together.

If the PMRQ is no longer required, place the PMRQ in Retired Status by selecting Option 1, "Revise Key Fields"; change Status to "Retired". Add revision comment for reason for retiring. Press enter to complete the revision.

Cross Reference: Procedures:

3 Initiate Model W/O

On Panel M100, Fill in the minimum required (red) fields: Description, W/O Type MO, Planner and Priority. Use Option 12, "Request planner to Plan" to send a AAA message to the identified Planner. The Planner is assigned to perform the actual planning of the Model Work Order that will be copied by the Predefined Parameter each time the task is due to be performed.

Cross Reference: PassPort Panel M100 Procedures:

4 Plan Model W/O

The planning of the Model Work Order is performed by the assigned Planner. The process is identical to the planning process described in Work Flow W100. When the work order is finally approved, the status will be AUTHORIZED, because it is a 'Model Work Order'. The Model Work Order will be entirely protected.

- Select and open the work order from the AAA received from the Engineer.
- Plan the work order through the normal planning process (see Work Flow Analysis W100).
- Inform the responsible engineer that the Model Work Order has been authorized and that the Predefined Parameter may be activated.

Cross Reference: Procedures:

5 Complete PMRQ Detail

After the Engineer has received the Model Work Order from the Planner, the Model Work Order must be referenced on the PMRQ.

- Enter the Model Work Order number on the Predefined Requirement panel D081. If not all the tasks on the Model Work Order are used for this PMRQ, enter the task number range used from the Model Work Order (tasks may not be skipped, i.e. 3-4 or 1-6 etc.).
- On the Predefined Requirement panel D081, verify the Frequency and Calculation Type are correct for the work described on the Model Work Order.
- Check the Forecast box if the PM Forecaster batch job should always provide future due dates (occurrence) of this PM. If this box is not checked, only the next due date work order will be generated (if within the defined lead time).
- Check the Auto Trigger box as appropriate. This box is only available if a model work order is referenced on the PMRQ. Work Orders will be generated by the PM Batch Generator when the due date is within the defined lead time.
- Check the PM Active Box if the generated Work Order Task should be created in the 'Ready' status. The Work Order Task will be generated in the 'Plan' status if the box is not checked.
- Enter the accounting information codes on the Predefined Requirement panel D081. This information will be automatically copied to the generated Work Order Task.
- Compare the Predefined Mandating Documents on panel D084 to the document references on the Model Work Order. Document References that should print on the Work Order Task should be entered on the Model Work Order and the print box should be checked on Document References panel M104. Mandating documents that should be referenced on the generated Work Order Task but not listed on the field package should be listed on the Predefined Mandating Documents panel with the B/G box checked. Mandating Documents that are important to the engineer as a reference for the Predefined Requirement (but do not require reference on the work package) should be listed with the B/G box not checked.
- If the work will cause a Limiting Condition, check the LCO box. Make a note in the Scope (Panel 5) about the reference to the LCO.

Cross Reference: PassPort Panel D081, D084, and M104.
Procedures:

6 Activate PM Requirement

The PMRQ is set to Active by the Engineer. This is done by entering ACTIVE in the status field and pressing enter.

If the Equipment Location is not active or not installed, leave the PM status in INACTIVE status and await the closeout of the installation package.

If the PM is due today, navigate to the Predefined Look Ahead panel and use Option 1 to 'Generate the Current Occurrence'. This will generate the first Work Order for this PMRQ.

Cross Reference: PassPort Panel D081 and D082
Procedures:

W210 Preventative Maintenance Requirement

W220: PM W/O Generation

Decomposition 01 of 01

Overview

The Predefined Parameters in PassPort are set up to generate Work Order Tasks or Work List items to support work that is performed on a periodically, based on calendar dates or threshold readings. Generation of work orders/lists is performed by two batch jobs that run nightly. The first job generates the next due date (occurrence) if within the lead time identified on the frequency or on the individual PMRQ. The second batch job is required to generate future due date of the work for scheduling purposes.

Assumptions

The PM Batch Forecaster will be set to generate work for the next six weeks.

Policies

Gaps

- Grace Period BIO (Issue #153)
Determine what the "Grace Period" in the BIO means. Are there actions/activities related to working in the grace Period?

1 Generate PM W/O

The PM Batch Generator is launched from the nightly batch job scheduler on the PassPort Host Computer. This nightly batch job scheduler is controlled by LMSI Computer Operations. When the batch job is run, the next due date (occurrence) of the PMRQ will be generated (if not already generated by the Batch Forecaster). If the PMRQ next due date has been previously generated and that date is incorrect (based on a previous completion), the next due date will be adjusted.

The next due date will be generated as a Work List item or a Work Order Task in "Plan" or "Ready" status depending on the settings in the PMRQs Model Work Order references.

Cross Reference:

Procedures:

2 Batch PM Forecasting Generator

The PM Batch Forecasting Generator is launched from the nightly batch job scheduler on the PassPort Host Computer. This batch job runs immediately following the PM Batch Generator and generates due dates of PMRQs for the next six weeks, if they are not already scheduled. This nightly batch job scheduler is controlled by LMSI Computer Operations. The six-week setting is set in the batch job's launch script. It may be changed as needed. The future due date of PMRQs are generated as a Work List item or a Work Order Task in "Plan" or "Ready" status depending on the settings in the PMRQs Model Work Order references.

Cross Reference:

Procedures:

W220 PM W/O Generation

RPP Work Management

W230: PM Worklists

Decomposition 01 of 01

Overview

This Work Flow provides instructions for using the PM Worklist and activities required to credit an item on the list as completed. PM Worklists are arranged by Alert Group and contain PMRQ items that do not have designated model work orders. During the nightly PM generation cycle (W220), PMRQs with designated model work orders, that are scheduled to be created, are generated as work orders in the work control system. PMRQs without designated model work orders generate as an item on the PM Worklist.

A Worklisted PM can be generated for any type of periodically scheduled activity. Typical activities include:

- HP Surveillance
- Surveillance Tests
- Ticklers

Use Panel M501, "Predefined Work List". This panel shows all current PMRQ items and their due date. Items remain on this list until the item is marked as completed. A separate list for each Alert Group is created daily by the PM Batch Generator for each Alert Group referenced on the current PMRQs.

Assumptions

Each Alert Group assigned to PMRQs that generate Work List items (as opposed to Work Order Tasks) will assign an individual to coordinate the performance of the Work List item and the crediting of the item when completed.

Policies

N/A

Gaps

None

1 Review Worklist

Each nightly run of the PM Batch Generator will create a Work List for each Alert Group that has outstanding PMRQ Work List items. The list contains all outstanding work list items for that Alert Group.

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The list identifies the due date (due early and due late may also appear depending on the calculation type). All members of the Alert Group will receive a AAA notification each time that a work list is generated. Access the worklist by selecting the AAA and pressing the enter key. This will open the Predefined Work List panel (D501) and display the appropriate work list. Print the work list using Option 1.

Cross Reference: PassPort Panel X020 and D501.

Procedures:

2 Perform Item

A member of the Alert Group coordinates the completion of the work list item.

Cross Reference: N/A

Procedures:

3 Credit Item

When the Worklist Item is complete, go to the Predefined Work List panel D501, select the completed item and press enter. The Predefined Requirements panel (D081) will open.

- Using the Look Ahead tab, access the Predefined Look Ahead panel (D082).
- Use Option 2, 'Credit the Current Occurrence'
- Enter the completion date or reading value as required.
- Save and Exit to return to the Predefined Requirements panel D081.
- Save and Exit again to return to the Predefined Work List panel D501.

From here, another work list item may be selected and completed as above.

Cross Reference: PassPort Panel D501, D081, D082

Procedures:

W230 PM Worklists

W310: Material Request

Overview

This Flow describes the relationship between the Work Order Task planning process and Materials Management. The need for material for a repair is identified by the Planner. The Planner initiates a Material Request and picks items from the BOM, identifies the material by the Master Materials Catalog ID or provides a description of the material if not listed in the Catalog. The Material Request is routed for approvals as appropriate and then sent to purchasing. During this review, Engineering will evaluate new items for addition to the BOM.

Assumptions

- ☐ Planners and Material Coordinators will identify new items by initiation of a New Item Initiation.
- ☐ Engineering will add new item Catalog ID's to the BOM as appropriate during the review.
- ☐ Engineering and QA Control the BOM.
- ☐ If all material ordered is from a BOM then Engineering and QA are not required to approve the material request.

Policies

The Planner initiates the Material Request associate with the Work Order Task for maintenance or operational activities which they are planning. If all items identified on the Material Request are also listed on the BOM associated with the Manufacturer/Model installed in the Equipment Location, the Planner routes the Material Request directly to the Material Coordinator for approval.

Gaps

- Issue #93 Delivery to Prompt I010
Need to review and add delivery points within RPP to the list.
- Issue #302 Appropriate Material Charges
The policies related to charging materials need to be clear - Single account per MR or multi (when and how)?
What information is required? (i.e., cost by CM, PM, PD, or projects)
How can this be identified? (CACN or COA)
One Work Order per MR?

1 Initiate Material request

During the planning of the Work Order Task, the Planner identifies the need for material by filling out the Material Request panel I010. The Planner is required to fill in the Need By Date, the Deliver To and Delivery Instructions fields. The accounting data is copied from the Task Profile panel M101. If the cost of the materials should be charged to the same accounts (usually true) then no changes are required. After filling in the required fields, the Planner must list the catalog ID's in the lower section of the panel per the instructions in the following steps.

Cross Reference: PassPort Panel I010
Procedures:

2 Select Catalog ID from BOM

To access the BOM for the Equipment Location or UTC work against, the Planner should press the 'Build M/R' button on the Material Request panel I010. On the window displayed, the Planner should select 'BOM' button. The Catalog ID's listed on the BOM are listed on the Bill of Materials panel D094. Sub-assemblies may be accessed by double-clicking next to the '+' indicator. To select items to be returned to the Material request, enter the number required, then Save and Exit the panel. All items identified with a W/O Quantity will be added to the Work Order Task Material Request. All items that were marked 'Verified' on the Bill of Materials panel have been reviewed by Engineering and may be ordered with out further review. Items which are not marked 'Verified' may be listed on the Material Request, but the routing must include Engineering approval. If Catalog ID's were identified on the BOM for all material needed to perform the work, proceed to Step 5. If additional materials not listed on the BOM are required, proceed to Step 3.

Cross Reference: PassPort Panel I010, D094
Procedures:

3 Select Catalog ID

If the BOM does not exist or does not contain all of the applicable Catalog ID's for the material necessary, search the Catalog by prompting on an empty Catalog ID field on the Material Request

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Section 3a – Work Flows
Engineer and initiate a New Item Initiation for any items that are determined to require a Catalog ID for addition to a BOM.

Cross Reference: PassPort Panel I010, I011
Procedures:

panel I010. From the Catalog ID search panel D20A, select the appropriate View and enter the selection criteria necessary to select the appropriate Catalog ID's required to perform the work. Enter the 'Q' level and the quantity required on the Material Request panel I010. Since the item was not on the BOM, this Material Request will require engineering and QA approval. If Catalog ID's have been identified for all material required, proceed to Step 5. If additional material not identified in the Catalog is required, proceed to Step 4.

Cross Reference:
Procedures:

4 Enter Non Catalog Items

For material not identified in the Catalog, enter the quantity, unit of issue, 'Q' level, check the 'Reserved' flag, and enter material name. Select the Line for this item and press 'Enter' to access the Material Request Detail panel I011. Enter a suggested Category, Name and Type for the item. Enter any other known information. The 'Additional Description' button can be used to access OLE enabled notes to record additional information.

Cross Reference: I010, I011
Procedures:

5 Route for Approvals

The Planner must route the Material Request for approval as follows:

- If all of the materials on the Material Request were 'Verified' Catalog ID's from the BOM, then the Material Request should be routed directly to the Material Coordinator.
 - If some or all of the materials on the Material Request were not verified items selected from a Bill of Materials route to Engineering and QC review as appropriate prior to routing to the Material Coordinator.
- The final Routing for all Material Requests are to the Material Coordinator. The Material Coordinator checks to see if materials are otherwise available or need to be purchased using a P-card and adjusts the Material Request prior to approving for purchase. The Material Coordinator will consult with the Planner and

W310: Material Request

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Flow 1

RPP Work Management

Section 3a – Work Flows

W320: Bill Of Materials

Overview

The need for a Bill of Material (BOM) may be identified by Engineering during the design or installation phase of equipment life, or may be identified by a Planner. Manufacturer and model number information is obtained from certified vendor information files or nameplate data and entered into PassPort. New Item Initiation is used to obtain Master Materials Catalog ID's for the spare parts/materials necessary for inclusion in the BOM.

Assumptions

All BOM Catalog ID's must be verified by Engineering prior to use.

Policies

None

Gaps

None

1 Identify Part Numbers

In order to build a Bill of Materials, the Manufacturer/Model information must be consulted to determine the recommended spare parts and other pertinent information. Manufacturer's also may provide kits for rebuild/repairs that are valuable BOM entries. Using certified vendor information and nameplate information, develop a list of part numbers.

Cross Reference:

Procedures:

2 Check Against Catalog IDs

From the Data menu of PassPort, Open the materials Information folder. Access the Master Materials Catalog. Use the search panel displayed to enter filter criteria. Perform a search of the Catalog to identify which part numbers needed for the BOM are already listed in the Master Materials Catalog in PassPort. For part numbers not listed in the Catalog, initiate a New Item Initiation on panel M209.

Cross Reference: PassPort Panel D20A, D209
Procedures: HNF-IP-0842 Vol V, Sec 3.1

3 Create PassPort BOM

A PassPort Bill of Material (version) is a list of materials that make up a piece of equipment that can be identified with a Manufacturer/Model number. A perfect Bill of Materials would include all of the piece parts that make up a unit identified with a Manufacturer/Model number. The Quality Level of the piece parts depend on where it is installed and is not necessary for the definition of a BOM version. The Q Level will be entered when this BOM is installed in an Equipment Location. To create a new BOM, enter the following data on the Bill of Materials panel D094.

- Mfr Code: Select code from site standard list prompt
- Model: Enter the Model number from the equipment nameplate, CVI data, etc.
- Catalog ID: Prompt on the Catalog ID to navigate to the Catalog Prompt panel D02A. Enter selection criteria to determine if the catalog already exists. If the catalog does not exist, fill out a New Item Initiation (D209) for the item.
- BOM Qty: Enter the number of parts required as part of the component.
- Document: Access the Documents panel by pressing the 'Documents' button. Enter document references such as O&M manuals, vendor drawings, etc. Installation Location specific drawings should not be entered here. They should be entered on the Documents panel associated with the Equipment Location.
- Notes: Optional. Notes categories should be defined.

Cross Reference: PassPort Panel D094, D078
Procedures: TBD

4 Verify BOM

Once the Bill of Materials has been created, engineering must identify the Manufacturer/Model BOM version installed in a particular Equipment Location. Access the Equipment Information folder from the Data Menu of PassPort. Access the 030 Equipment/Component Data. Access the 'Installation History' folder. Enter the Manufacturer/Model/BOM Version number that is installed in that Equipment Location.

After the BOM Version is identified to the Equipment Location, Engineering must identify and verify the 'Q Level' for each Catalog ID on the BOM version. This is done by pressing the Bill of Materials button from the Equipment/Component Data panel D030 to access the Bill of Materials panel D090. Enter the 'Q level' for each Catalog Id identified. To Verify the 'Q Level', use Option 3 'Set Engineering Verification True'. After the Verification is performed, Planners may select items off of the installed BOM without further Engineering review.

Cross Reference: PassPort Panel D030, D034 and D094
Procedures: TBD

W320: Bill of Materials

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Flow 1

W330: Uniquely Tracked Commodities – UTC

Overview

PassPort provides the ability to identify a specific piece of equipment as a Uniquely Tracked Commodity (UTC). UTCs are defined by a unique Manufacturer/Model/Serial number. A UTC usually has a Catalog ID that is Traceable by Serial Number. The UTC functionality allows the site to track unique pieces of equipment by serial number as it is moved from equipment location to storage to repair, to equipment location. The UTC history shows everywhere a UTC has been installed and when. The Equipment Location history shows every UTC which has been installed in that slot and when. CAMs and Jumpers have initially been identified as equipment that should be identified with an UTC number. In addition, Maintenance & Test equipment can also be identified with a UTC number to identify the Work Order Tasks that they were used on.

Assumptions

Maintenance and Test Equipment (M&TE) will be identified with a UTC number (See Procedure HNF-IP-0842 Vol V Section 3.2)

Policies

None

Gaps

- Issue #305 Measuring & Test Equipment in PassPort
It has not been determined if test equipment check-in/check-out will be handled through PassPort Inventory. This would require setup of PassPort warehouses (tool issue points).
- Issue #117 Document UTC Discussion
Write up decisions made for UTC from discussions in BPI session
- Issue #66 UTC equipment Management
What equipment within RPP would be beneficial to be managed under the UTC process?

1 Build UTC Record

A Uniquely Tracked Commodity may be defined directly on the UTC Panel D050. This panel is used to define UTCs for equipment that has already passed through procurement, receiving and issue. This equipment is installed in the field or is stored as spare equipment outside of a PassPort defined warehouse at the time of PassPort Work Management implementation.

2 Receiving Traceable Items

During the receiving process, if a Catalog ID is defined as traceable by Serial Number, a UTC will be generated by PassPort upon receipt. The UTC will then be available to install in an Equipment Location.

Cross Reference: PassPort Panel I020 and I023

Procedures: *tbd*

3 Install New UTC

UTCs can be identified as installed in an Equipment/Component Location from the Installation History Panel D034 or upon completion of a Work Order Task to install a replacement.

When the UTC is entered as installed on the Installation History panel D034 with a Manufacturer/Model/BOM version not on the approved models list, the installation will be displayed as a non-verified entry on the Approved Models panel D033.

When a Work Order Task is performed to install a replacement, the new UTC can be removed using Option 2 on the Task Completion panel M301. Option 3 on the Task completion panel M301 is used to enter the new UTC number. This installation will also be displayed on the Installation History panel D034. An AAA message will be sent to the Engineering group responsible for the verification. Engineering will verify the installation or initiate a Work Request to install the correct manufacturer model equipment.

Cross Reference: PassPort Panel I020 and I023

Procedures:

W330: Uniquely Tracked Commodities - UTC

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Flow 1

W810: Equipment Data, New Equipment

Overview

This flow is intended to describe the process for entering new equipment into PassPort. Identification of requirements for new equipment is provided on an Engineering Change Notice. Preliminary design media (e.g. drawings, specifications, Bills of Material) are prepared. Based upon the preliminary design, new equipment is entered into PassPort and equipment tag numbers are created.

Assumptions

Future implementation will include PassPort modules: Action Tracking, Engineering Change Control, Clearance Order, and Document Management. Items on this flow are designated PassPort (blue) and non-PassPort (gray) for this implementation. Non-PassPort steps may be integrated in the future as additional PassPort Modules are implemented. Process touch points with other PassPort modules planned for future implementations are also identified (green).

Engineering documentation defining the equipment location is required to add a new record to the Equipment Component Data which represents the Master Equipment List for the Tank Farms facility (TF).

Policies

This flow applies to all equipment within the Tank Farms Facility. All new equipment installed in the Tank Farms facility will have equipment tag numbers assigned.

Gaps

- Issue #40 Equipment Labeling
There will be an equipment labeling standard used to define the format of the Equipment tag. HNF-IP-0842 Vol IV section 4.14 needs to be modified to include new projects. That standard should be released to all projects as requirements.

1 Identify Need For New Equipment

The need for addition of Equipment Locations in the PassPort Master Equipment List is identified via a new design documented by an Engineering Change Notice.

Cross Reference:

Procedures: TBD

2 Preliminary Design

Engineering documentation is required to add equipment to the PassPort Master Equipment List. As a part of the Engineering Change Notice design process, a preliminary design will be created. This preliminary will at a minimum identify the structure, equipment and system.

Cross Reference:

Procedures: TBD HNF-PRO-440

3 Enter PassPort Equipment Location Data

From the preliminary design, create a new equipment location in PassPort (Panel D030). The new equipment will be input in "Design" status. PassPort will then allow planning work to proceed in the Work Management module against the new equipment.

- Identify the next sequential number for the equipment utilizing the Equipment Prompt Panel D03A.
- Refer to Labeling Standard found in HNF-IP-0842 Vol IV, Section 4.14 to create the equipment tag (Issue #40)
- Verify that status is "Design".
- Feedback the equipment numbers and tag id's to Engineering to be included in the design documentation.

Cross Reference: D030, D03A

Procedures: HNF-IP-0842 Vol IV Section 4.14

4 Action Request (Future)

When PassPort Action Tracking is implemented, the need for a new design will be identified on an Action Request to Engineering. An assignment to a particular engineer will be made to create the new design.

Cross Reference: A010 family of panels
Procedures: N/A at this time

5

Engineering Change (Future)

When PassPort Engineering Change Control is implemented, the assignment to create a new design will result in a Design Change in PassPort. The new equipment locations will be referenced in the Design Change along with the changed or new documents and the work order(s) used to implement the design.

Cross Reference: E010 family of panels
Procedures: N/A at this time

W810: Equipment Data, New Equipment

Flow 1

W820: Equipment Data, Temporary Installation

Overview

A temporary Engineering Change Notice is prepared to document temporary new installations. Based upon the ECN, the temporary equipment may be entered into PassPort and equipment tag numbers identified and incorporated onto the ECN.

Assumptions

Future implementation will include PassPort modules: Action Tracking, Engineering Change Control, Clearance Order, and Document Management. Items on this flow are designated PassPort (blue) and non-PassPort (gray) for this implementation. Non-PassPort steps may be integrated in the future as additional PassPort Modules are implemented. Process touch points with other PassPort modules planned for future implementations are also identified (green).

Temporary equipment installations will be identified on an ECN.

There is a 180 day limitation to Temporary Installations.

Policies

This flow is applicable to the installation of all temporary equipment within the TF Facility. All locations where temporary equipment may be installed in TF will have equipment tag numbers assigned.

Gaps

- Issue #40 Equipment Labeling
There will be an equipment labeling standard used to define the format of the Equipment tag. HNF-IP-0842 Vol IV section 4.14 needs to be modified to include new projects. That standard should be released to all projects as requirements.
- Issue #114 Temporary Equipment
Temporary equipment can only remain installed for 180 days. Need a report (or other mechanism) to track temporary equipment and verify removal before the end of the installation limit.

Section 3a – Work Flows

1 Identify need for Temporary Installation

Temporary installations are performed for many reasons. The request may be through operations based on changes to baseline requirements. Examples may be found in HNF-IP-0842 Vol. IV section 4.5

Cross Reference:

Procedures: HNF-IP-0842 Vol. IV section 4.5

2 Generate Temporary ECN

Prepare Temporary ECN as described in HNF-PRO-440. Determine if the location for the installation of the temporary equipment already exists in the Equipment / Component data in PassPort (MEL). If it does exist, it is not necessary to create another equipment location in PassPort.

Cross Reference:

Procedures: HNF-PRO-440
HNF-IP-0842 Vol. IV Section 4.5

3 Enter PassPort Equipment Location Data

If it is determined in the ECN that a Master Equipment Identifier should be created to record the location of the temporary installation create the new equipment location in PassPort (Panel D030).

- Identify the next sequential number for the equipment utilizing the Equipment Prompt Panel D03A.
- Refer to Labeling Standard found in HNF-IP-0842 Vol IV, Section 4.14 to create the equipment tag (Issue #40)
- Feedback the equipment numbers and tag id's to Engineering to be included in the design documentation.
- Set the Equipment status to "Active"

Cross Reference:

Procedures: D030, D03A
HNF-IP-0842 Vol IV section 4.14

4 Action Request (Future)

When PassPort Action Tracking is implemented, the need for a new design for a temporary installation will be identified on an

Action Request to Engineering. An assignment to a particular engineer will be made to create the new design.

Cross Reference: A010 family of panels
Procedures: N/A at this time

5 Engineering Change (Future)

When PassPort Engineering Change Control is implemented, the assignment to create a new design for a temporary installation will result in a Design Change in PassPort. The new equipment locations will be referenced in the Design Change along with the changed or new documents and the work order(s) used to implement the design.

Cross Reference: E010 family of panels
Procedures: N/A at this time

W820: Equipment Data, Temporary Installation Pg. 1 of 1

W830: Equipment Data, Existing Equipment

Overview

Identification of requirements for revising or adding an equipment tag number for existing equipment is provided on an approved Work Request. An ECN is prepared to document the equipment tag number. The existing equipment is entered into PassPort and an equipment tag number is assigned and incorporated into the ECN.

Future implementation will include PassPort modules: Action Tracking, Engineering Change Control, Clearance Order, and Document Management. Items on this flow are designated PassPort (blue) and non-PassPort (gray) for this implementation. Non-PassPort steps may be integrated in the future as additional PassPort Modules are implemented. Process touch points with other PassPort modules planned for future implementations are also identified (green).

Assumptions

All changes to, or additions of, equipment tag numbers will be documented on an ECN.

Policies

This flow is applicable to the revision of existing equipment tag numbers or the assignment of new equipment tag numbers to existing equipment.

Gaps

- Issue #40 Equipment Labeling
There will be an equipment labeling standard used to define the format of the Equipment tag. HNF-IP-0842 Vol IV section 4.14 needs to be modified to include new projects. That standard should be released to all projects as requirements.

1 Identify need for new tag on Existing Equipment

Generated by need to operate/maintain equipment and have the equipment number within the PassPort MEL. Generated by approved Work Request by operations.

Cross Reference:
Procedures: TBD

2 Generate ECN

Prepare ECN as described in HNF-PRO-440

Cross Reference:
Procedures: HNF-PRO-440

3 Enter PassPort Equipment Location Data

From the ECN, create new equipment item in PassPort (Panel D030).

- If the Equipment is already in PassPort, use Option #2 on Panel D030, "Request Change Equipment/component Number", add a note listing the old component ID.
- If equipment is not in PassPort, identify the next sequential number for the equipment from Equipment Prompt Panel D03A.
- Refer to Labeling Standard found in HNF-IP-0842 Vol. IV section 4.14 to create the equipment tag (Issue #40)
- Change the status to "Active"

Cross Reference: D030, D03A

Procedures: HNF-IP-0842 Vol IV section 4.14

4 Action Request (Future)

When PassPort Action Tracking is implemented, the need for a new tag on existing equipment will be identified on an Action Request to Engineering. An assignment to a particular engineer will be made to create the change document.

Cross Reference: A010 family of panels

Procedures: N/A at this time

5 Engineering Change (Future)

When PassPort Engineering Change Control is implemented, the assignment to create a new tag for existing equipment will result in a Design Change in PassPort. The new equipment locations will be referenced in the Design Change along with the changed or new documents.

Cross Reference: E010 family of panels

W830: Equipment Data, Existing Equipment Pg. 1 of 1

Flow 1

W840: Equipment Data, Balance of Data

Overview

Identification of equipment locations for new, temporary or existing installations has been defined in Flows W810-W830 of this document. After the name, location and Tag Id are defined, there are 15 panels available in PassPort to record detailed information about that equipment location. This flow is intended to describe the information that may be entered each Equipment Location.

Assumptions

Data for all Equipment Locations will not be entered. Engineering programs will define what data is required for which Equipment Location

Policies

This flow is applicable to all equipment locations defined at the Tank Farm facility.

Gaps

- Issue #82 Define trouble/breakdown
Define use of trouble/breakdown field & options
T/b are counted for a piece of equipment. Initially wasn't used (marked on M010) count is found on M101 - task detail button

1 Equipment/Component Data

The Equipment/Component Data panel D030 identifies the Equipment Location. This information was entered during the previous flows for new equipment, existing equipment and temporary installations. From the panel, the user can access the other Equipment/Component Data panels via folders or buttons. This flow will describe the use of each PassPort panel accessed via a folder or button from the Equipment/Component panel D030 which will be used by RPP. Additional folders exist that will not be utilized at initial implementation. These panels will be secured.

Cross Reference: D030

Procedures: TBD

2 Additional Details

On this panel, the pollution code, normal position, critical equipment flag, safety class, Q level, equipment train, Maintenance Programs and the equipment alert group are used. None of this information is required by PassPort. This information is filled in by Engineering

Cross Reference: PassPort Panel D031

Procedures: HNF-PRO-440

3 Operating Specifications/Readings

The Operating Specifications panel D032 is used to define a Equipment Location specific specification sheet. It may be used to identify operational readings or calibration/testing data. A high and low trigger may be set and a Model Work Order referenced. From the Equipment/Component Data panel D030, the 'Readings' button is used to access the Equipment Readings panel D074. The Equipment Readings panel may also be accessed from the Work Order task closeout to enter reading values. If the entered value falls outside the high/low window a Work Order Task is generated to mitigate the out of tolerance reading. The Predictive type Work Order is created in Plan status by copying the Model Work Order referenced.

Cross Reference: PassPort Panel D032, D074

Procedures: HNF-IP-0842 Vol IV section 4.14

4 Identify Approved Models

Engineering may identify Manufacturer/Model and BOM version's which may be installed at an Equipment Location on the Approved Models panel D033. This entry is verified by engineering on the same panel. When a Manufacturer/Model/BOM version is installed during Work Order Task closeout and it is not on the approved models list, the Manufacturer/Model/BOM version will be displayed as a non-verified entry on the Approved Models panel D033 and will be shown as installed on the Equipment Installation panel D034. An AAA message will be sent to the Engineering group responsible for the verification. Engineering will verify the installation.

RPP Work Management

Cross Reference: PassPort Panel D033
Procedures:

Section 3a -- Work Flows

5 Installation History

The Installation History panel D034 is used by Engineering to record what equipment is installed in an Equipment Location. The identification may be by Manufacturer/Model or by UTC (which will fill in the Manufacturer/Model number. If there is an associated BOM version, it will also be noted.

Cross Reference: PassPort Panel D033
Procedures:

6 Status Tracking

The Equipment Location status is kept historically on the Status Tracking panel D039. All entries are automatic

Cross Reference: PassPort Panel D039
Procedures:

7 Permit Requirements

Not used in Equipment Data

Cross Reference: PassPort Panel D042
Procedures:

8 Equipment Reservations

The Equipment Reservations panel D045 displays unfinished Work Order Task that have listed this Equipment Location as reserved. This may apply to CAM location, installed cranes or jumpers. The Work Order Task, hours, scheduled date and time are displayed.

Cross Reference: PassPort Panel D033
Procedures:

9 Nuclear Details

The Nuclear Details panel D048 is used to identify if the Equipment Location is related to a Technical Specification.

Cross Reference: PassPort Panel D048

Procedures:

10 Notes

The Notes panel is accessed from the Equipment/Component panel D030 via the 'Notes' button. The Notes panel X293 is a PassPort Generic Notes panel. Various Notes Topics will be created that can be accessed by double clicking on the topic. Security will be set-up to limit access to each topic to those persons defined.

Cross Reference: PassPort Panel X293
Procedures:

11 BOM

The Bill of Materials panel D094 is accessed from the Equipment/Component panel D030 via the 'BOM' button. The Bill of Materials for the installed equipment will be displayed. See Work Flow W860.

Cross Reference: PassPort Panel X293
Procedures:

12 Equipment Parameters

The Equipment Parameters panel D071 is accessed from the Equipment/Component panel D030 via the 'Parameters' button. The Equipment Parameters panel provides an unlimited number of 20 character fields for Engineering to define additional data. The fields are set-up as Complex Codes in PassPort System Administration. If fields need to be defined, see the appropriate PassPort System Administrator. Templates may also be defined.

Cross Reference: PassPort Panel D071
Procedures:

13 Document References

The Document References panel D078 is accessed from the Equipment/Component panel D030 via the 'Document References' button. The Document References panel is used to list document references which are applicable to the Equipment Location. Document References which relate to the installed equipment

should be listed against the Bill of Materials or the UTC installed. Checking the 'Display all Related Documents' box will list the Equipment Location, BOM and UTC documents all at once for the equipment installed in this location.

Cross Reference: PassPort Panel D071
Procedures:

14 PM Program

The Predefined Parameters panel D080 is accessed from the Equipment/Component panel D030 via the 'PM Program' button. The Predefined Parameters in PassPort is where the Preventative Maintenance, Testing or other repetitive tasks are defined. See Work Flow W200

Cross Reference: PassPort Panel D080 family
Procedures:

W840 Equipment Data, Balance of Data

Pg. 1 of 1

Flow 1

3b - Reporting Analysis

Reports in the Work Management module of PassPort are listed in the table below. The BPI team determined the disposition of the reports as shown. Further information on the use of each report is available in the PassPort Work Management Specifications document, TIGB-041-0897-10, and available on HLAN at \\Apo10\h2k_ro\Vendor Documentation\PassPort Baseline Documentation Release 6.0.1\BASELINE\WORKMGMT\wm_spec.pdf. You will need Acrobat Reader to read that document (also available on HLAN)

Further reporting analysis was deferred until implementation to allow for a better understanding of data availability.

Gaps:

- Issue #163 Report Writer (See W100)
Need to define what report writing application will be used, how training will be handled and who has access to the system.
- Issue #100 Access to standard site forms (See W150)
Need a consistent, universally used procedure/application and location to provide access to site forms.
AJHA contains site forms, PassPort needs the forms.
Proclimo contains forms, JetForms contains forms, HLAN contains forms.
Need a single application (probably Jetforms) that is OLE compliant which houses all forms (at least templates).

Work/Equipment Management Reports		
PassPort ID	Report Name	Status
TIBDo81	Batch PM Generator	Used
TIBDo82	Batch PM Forecasting Generator	Used
TIBD122	Audit Detail	Not Used
TIPDB90	Bill of Materials	Used – Add Logo: Which logo will it use? Can each facility/company use their own?
TIBM219	W/O Close	Not Used – want the auto generate batch job to run, but don't want the print out
TIBM500	Predefined Work List Generator	Used
TIBM501	Predefined Work List Batch Report	Not Used

RPP Work Management

3b -- Reporting Analysis

Work/Equipment Management Reports		
PassPort ID	Report Name	Status
TIBM502	Predefined Work List Report Generator	Not Used
TIBM650	PASSBOOK Summary Program	Not Used
TIBWOSUR	Contract Work Order Task Summary	Not Used
MA10	Work Request Report	Used
MA11	Service Request Report	Future Use (DynCorp)
MA30	Equipment List Report	Used
MA31	Equipment Warranty Expiration Report	Not Used
MA32	Equipment/Component ID Change Report	Used
MA33	Operations Log End Of Shift Report	Future Use
MA40	Cost Summary of Completed Work	Future Use
MB11	Crew Daily Schedule	Used
MC10	Job Investigation Sheet Report	Used
MC11	Work Order Package Job Submission	Used
MC15	Permit Expiration Report	Not Used
MC16	ROW Request/WO Backlog Launch	Not Used
MC17	Permit Request/WO Backlog Launch	Not Used
MC34	Work Order Backlog Report	Used
MC35	Work Readiness Report	Used
MD20	Equipment Maintenance History	Used
MD21	Location References Report	Not Used
MD22	Reservable Equipment Report	Used (Must have an Equipment record - Do30)

Section 4 Major Data Structures and PassPort Settings

4A - PassPORT Settings

Equipment Data Hierarchy

- There is only one Facility for all Tank Farms. The code is TF
- Units are Farms. Some exceptions: A unit may be designated to hold equipment external to farms, Mobile equipment that doesn't fit the normal equipment category (CPI trucks), and particular structures not directly related to a farm, i.e. Cross Site Transfer line.
- Equipment types will be those listed on the H-14-20000 drawing
- Area is the common designator for all Hanford areas. TF is in CP – Central Plateau

Item	Data Example	Comment
Facility	TF	Fixed by HSTD
Unit	241AN	Farm, Major structure, Geography
Ops System	VTP	Major System (H-14-20000)
Equip. Type	CAM	
Equip. (id)	001	
Equip. Tag	AN101-VTP-CAM-001	
Location (Map/GPS)	Map/GPS	Probably not used
Location Description	Yes	Instructions to find this item
Division (20 char)	AN101	Major Structure housing equipment
Area (8 char)	CP	Fixed at a site level
System (6 char)	Blank	
Class (6 char)	Blank	

This is based on a 'systems' view. All equipment is categorized by the system the equipment supports.

- 1) The operating systems listed for this case are those found on the H-14-20000 table under the heading "System Identification"
- 2) Division will contain a list of the structures touched by the Unit. (from FacilitiesCore).
- 3) Each Unit will have a unique set of Operating systems and Divisions.(structures)

Issues:

- 1) Sampling Trucks – Consider identifying as Equipment, break down further to component level for instruments, truck equipment, etc.

Options: Unit could be CPO. Con: this is an organization, could change.
 Unit = Mobile Equipment. This could cover cranes, forklifts, cherry pickers, etc. Pro: You can schedule equipment to work orders, tasks, etc., as a resource. Can't do that for Units (if Truck #1 was a unit)
- 2) Equipment/structures outside Farms or independent of farms, i.e. Cross Site Transfer, power stations, Evaporator, Labs...

Options include: create a unit called "241EXT" to hold all non-farm items, Separate units 241CST, 241PWR...

Section 5 - Glossary

Term	Definition
AAA	Action Awareness Alert – (Triple A Message) A function of PassPort. A AAA is a notification that something has occurred in the system that requires the user's attention. It may take the form of an informational item or an approval request. When the AAA is an approval request, all activity on that item is suspended until the user dispositions the AAA. AAAs are generated automatically in certain circumstances, and may be manually generated from most Work management panels. More information on AAAs is available in the PassPort user help.
Attributes Profile	Panel (M10X) allows the user to Document additional details about the current work task.
Backgrounded	Copying a previous work order or work order task to a new, open work order or work order task. This process is available on selected panels under the Options selection on the main menu. A backgrounded item retains applicable routing lists, but no approvals.
Bill of Material	<p><u>Hanford Definition:</u></p> <p>Bill of Material (BOM) (aka: "PARTS REQUEST") is used as the originating document for acquisition of material and services for maintenance activities within Maintenance Programs and Upgrade Project.</p> <p><u>PassPort Definition:</u></p> <p>BOM is a predefined list of all piece parts for a Manufacturer/Model item. Bill of Materials is uniquely based on Manufacturer/ Model.</p> <p>A material request is used to define/acquire parts needed to do a specific job.</p>
Child Panel	Any panel that can be reached as a button or tab from another PassPort Panel.
CPM	Critical Path Method. Used as part of the Primavera Project Planner (P3) system in use by RPP to provide an integrated baseline cost and schedule. PassPort integrates with the P3 to provide daily work schedules. See W130 for more information.
Equipment	A location in a system which contains a physical element. The location itself is the equipment, not the machinery placed there. Equipment can be maintained, repaired, added and replaced. Equipment is required to hang a tag (Clearance Order).
Interrupt	A field on Work Order Task and Equipment Panels that indicate the length of time that equipment, UTC, etc. will be unavailable to its normal work function.

Material Request Hanford Definition:

Material Request Form (MRF). Form BC-7400-310 used as the originating document for the acquisition of materials, services, return to vendor, return to inventory, and excessing for all shop and shop stock activities in Maintenance Programs and Upgrade Project.

PassPort Definition:

All materials required to perform work are ordered through the Material Request.

More Detail A

small "Peelie" icon that looks like the corner of a page turned down is found in the upper left corner of most fields on a PassPort panel. Clicking on this icon takes you to a panel providing more information about the item that is displayed in the field.

Prompt The

square button at the right of some PassPort fields. Clicking on this button opens a panel listing all the valid items for this field

UCR

Unit Condition Required. In some cases, equipment must be in a defined operating condition (working, off-line, isolated...) before work can be performed on the equipment. The UCR field appears on Task and equipment panels to allow users to define the required conditions

UTC

Uniquely Tracked Commodity - Equipment identification based on individual component (serial number, manufacturer/model). Allows site based tracking to an individual piece such as motor, fan,

Work Against

Work Orders and Work Requests require the definition of what is to be worked on. PassPort refers to the object to be worked on as the Work Against. Allowable "Work Against" for RPP include Equipment Location, UTC and Name & Location.

Work Standard

Generally a work instruction that is stored in PassPort as a standard for work of a similar type.

Appendices

Reading IDEF0 Documentation

Rules:

- ☐ All inputs/triggers originate from the left, and enter processes from the left: all resultant objects are exit to the right and originate from the right side of the processes. This enables easy viewing and interpretation as well as matching of 'inputs' and 'outputs' during cascading.
- ☐ One input is typically a reason why the process is performed. Other inputs may be objects that contribute to, and are altered by, the process.
- ☐ Decisions arising within a process are assumed to be simultaneous and of equal priority.
- ☐ There are no "decision boxes". Decisions are perceived to be an inherent part of each process step.
- ☐ Outputs are always 'objects' or 'states of objects' - not processes.
- ☐ Input and Outputs map from level to level, assuring consistency and congruency. In this manner it is possible to map to as many levels as are required (this rarely exceeds three).
- ☐ Constraints are those factors that influence the process, but are not changed or altered by it.

This Work Flow Document contains 2 levels of work flow diagrams, Level 0 and Level 1. Level 0 flows give an overview of the process. Level 1 flows usually show the detail required to understand the work flow, create procedures, and instruct users. Level 0 and Level 1 flows should match in the number and descriptions of inputs and outputs.

Level 0

Level 1