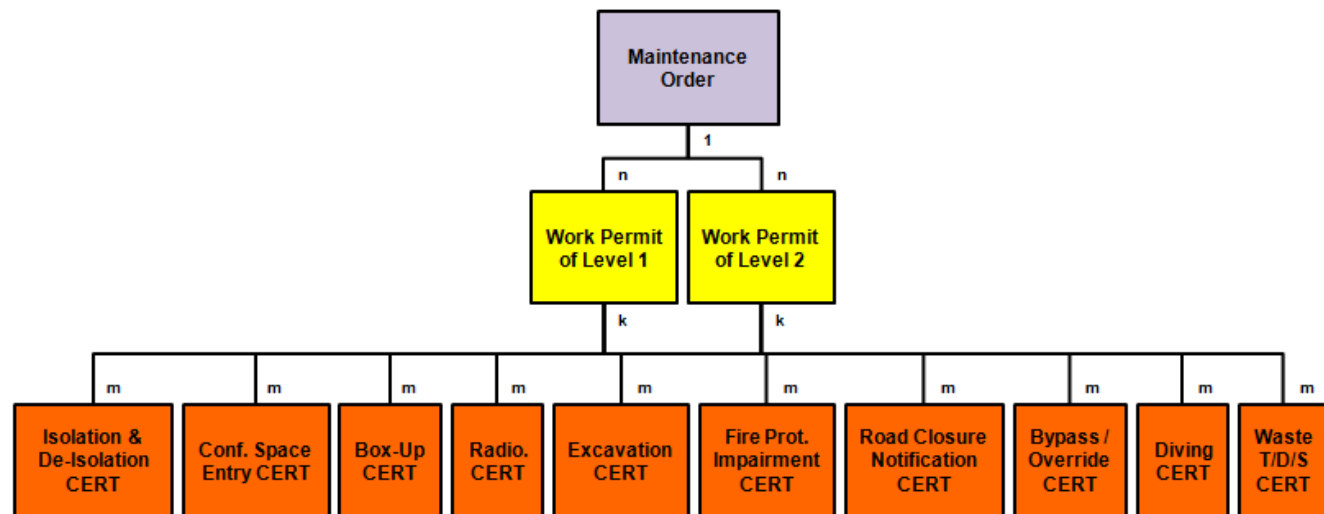
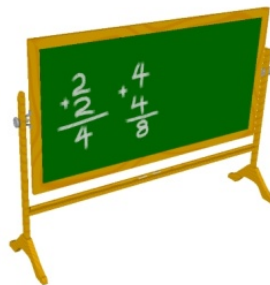


# Work Permit Management Configuration Guide

**SAP ERP 6.0 EhP 6 SP 8**



WCM GmbH  
May 2013



## How to Proceed? How to Start? How should I Learn? ...

1. Print out the complete IMG for WCM. (Transaction SIMGH)  
Try to understand the documentation of the IMG activities.
2. Configure your **OWN** planning plant.  
Avoid copying of existing entries. Repetition is the best exercise.
3. Check your configuration.



## Legend



Mandatory IMG-Activity



Language Dependent IMG-Activity



Verify the IMG-Activity

# Content

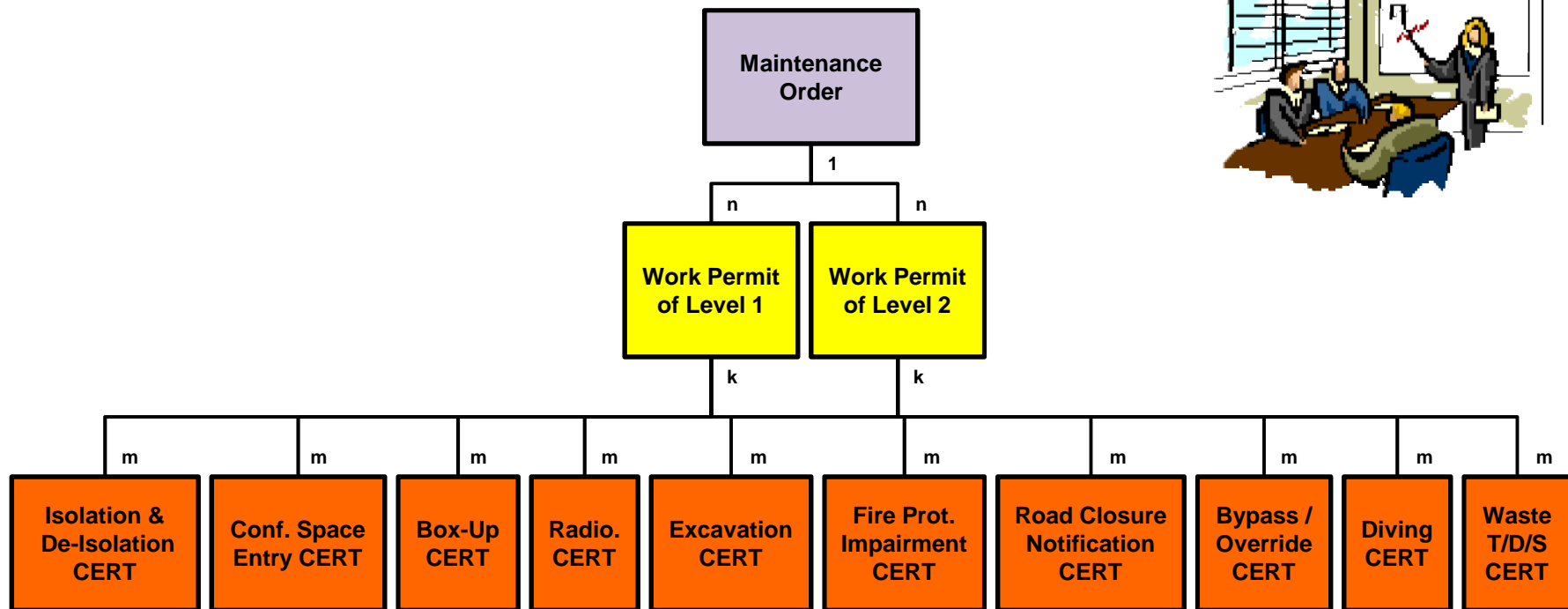
- Master Data
- Approvals
- Lockout / Tagout



Work Clearance Management	
Master Data	
•	Maintain Application Profile
▶	Architecture
•	Settings for WCM-Relevant Operations
•	Define Valuation
▶	Number Ranges
▶	Usages
•	Define Work
•	Define Requirements
•	Define Parameter for Text Processing
▶	Catalogs
▶	Document Management
▶	Priorities
▶	User Status
▶	Partner
•	Check Consistency of Master Data
▶	Data Transfer When Creating with Template
▶	General Data
▶	Print Control
▶	Enhancements for Technical Objects
▶	Field Selection
•	Maintain Operation Data for Work Clearance Management
•	Integration with a Graphic WCM Planning
▶	Archiving
▶	Groups/Groupings
▶	Lineup
▶	View Profiles
▶	Approvals
▶	Lockout/Tagout
▶	Business Add-Ins

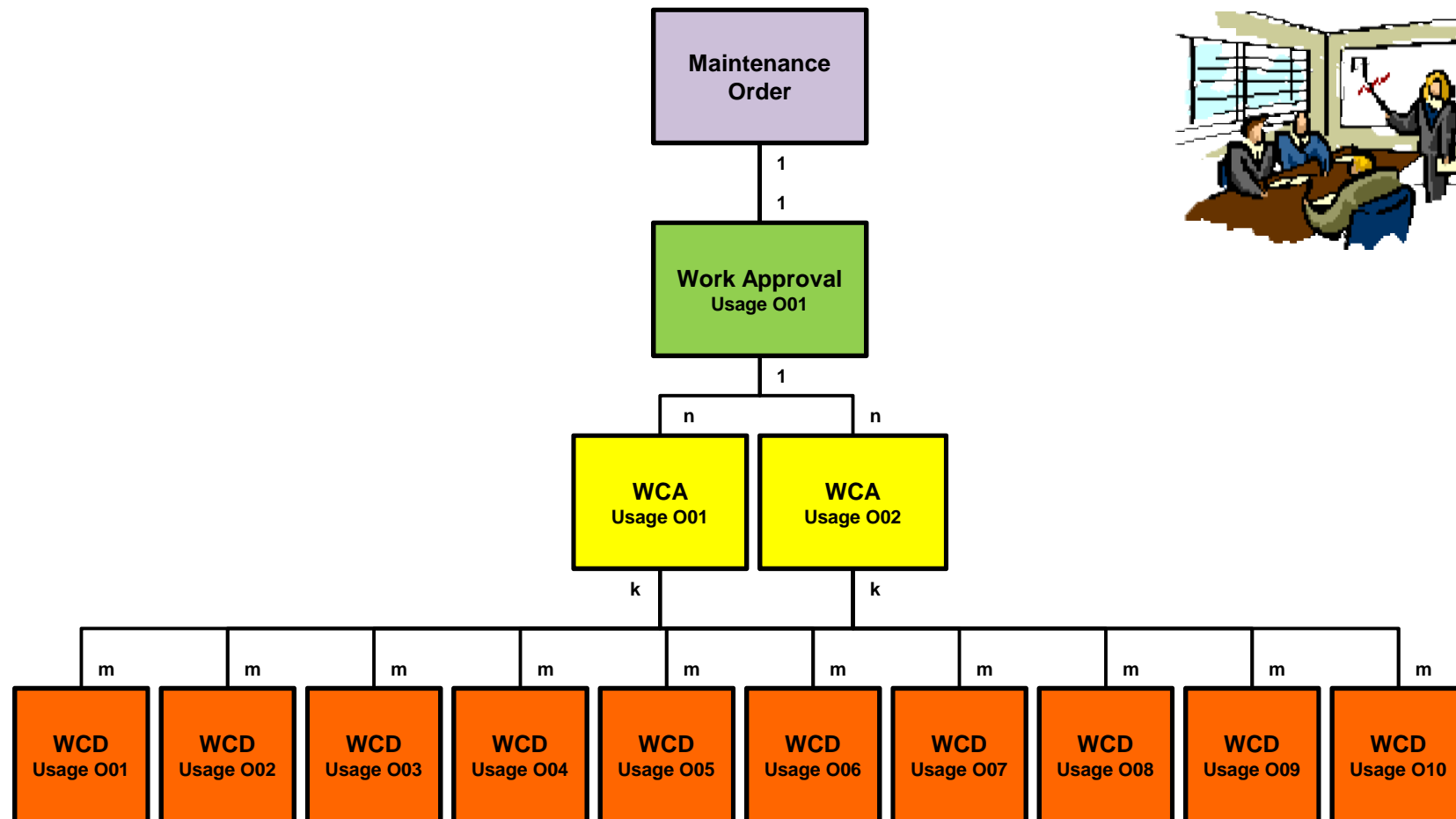
# Architecture

## What you need!



# Architecture

What you need in the system!



# Architecture

What the user should see!

**Multi-Level List Editing - Change**

Icons: [Save] [Edit] [Add] [Delete] [Filter] [Orders] [Work Permits] [Certificates] [Edit] [Print] [Help]

0001

4000080 WCM-RELEVANT ORDER 03.06.2013 Work Permits  
WCM EXEC CRTD MANC NMAT PRC

10000600 001 WORK PERMIT LEVEL 1 03.06.2013-03.06.2014  
CRTE [Icons]

10000400 001 ISOLATION & DE-ISOLATION CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

20000300 002 CONFINED SPACE ENTRY CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

30000200 003 BOX-UP CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

40000200 004 RADIOGRAPHY CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

50000200 005 EXCAVATION CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

60000200 006 FIRE PROTECTION IMPAIRMENT CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

70000200 007 ROAD CLOSURE NOTIFICATION CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

80000200 008 BYPASS/OVERRIDE CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

90000200 009 DIVING CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

100000200 010 WASTE T/D/S CERTIFICATE 03.06.2013-03.06.2014  
CRTE [Icons]

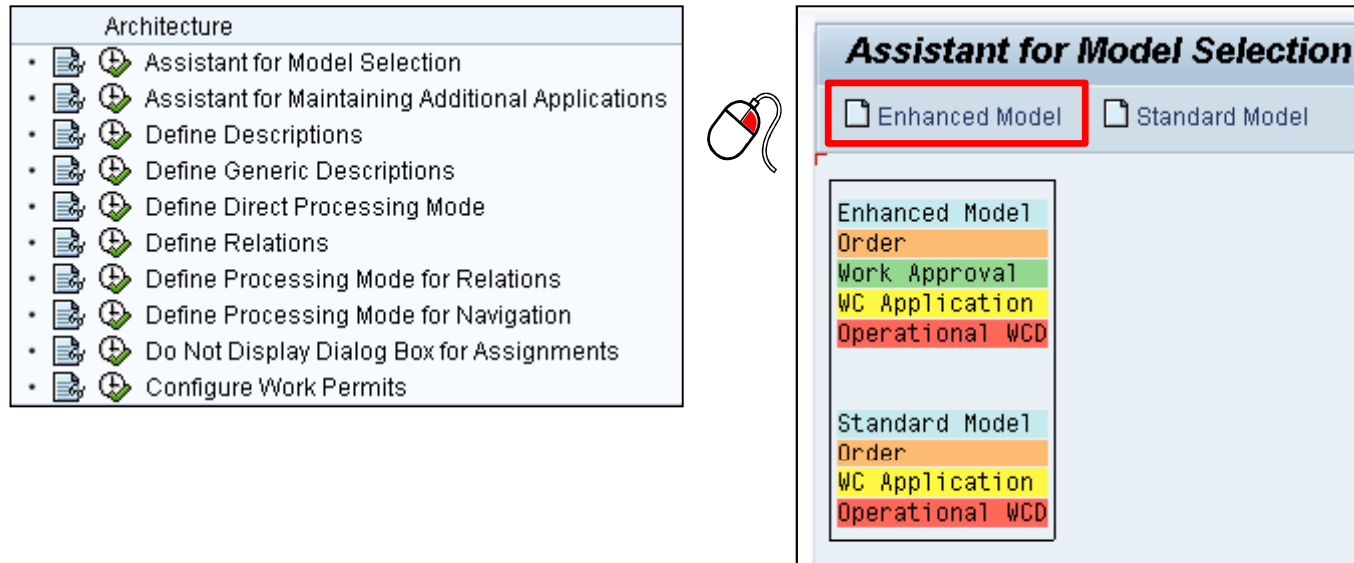
20000400 002 WORK PERMIT LEVEL 2 03.06.2013-03.06.2014  
CRTE [Icons]

The work approval is not visible

The WCM objects have different number ranges

Several certificates have no items

## Master Data -> Architecture -> Assistant for Model Selection








We use Work Permit management which assumes the enhanced model!

In this IMG activity, you choose the model you want to use for your WCM. You can choose one model for each maintenance planning plant. Work permit management assumes the enhanced model.



## Master Data -> Architecture -> Define Descriptions



Change View "Define Descriptions": Overview					
    					
PIPI	Typ	Typ	Description	Description in Plural	
0001	OR		Order	Orders	
0001	WA	1	WC Application	WC Applications	
0001	WD	0	Operational WCD	Operational WCDs	
0001	WD	T	WCD Template	WCD Templates	
0001	WI		WCD Item	WCD Items	
0001	WW		Work Approval	Work Approvals	









You must **replace** the proposed values.

PIPI	Typ	Typ	Description	Description in Plural	
0001	OR		Order	Orders	
0001	WA	1	Work Permit	Work Permits	
0001	WD	0	Certificate	Certificates	
0001	WD	T	Template	Templates	
0001	WI		WCD Item	WCD Items	
0001	WW		Work Approval	Work Approvals	

In this IMG activity, you maintain descriptions for the WCM objects used.

## Master Data -> Architecture -> Define Generic Descriptions



Change View "Define Generic Descriptions": Overview				
New Entries      				
Define Generic Descriptions				
PIPI	Typ	Description of WCM Object	Description of WCM Object in Plural	
0001	WA	Work Permit	Work Permits	
0001	WD	Certificate	Certificates	

You must **replace** the generic descriptions.



In this IMG activity, you define the generic descriptions for WCM objects that you use.

## Master Data -> Architecture -> Define Direct Processing Mode



Change View "Maintain Processing Mode": Overview						
	PIPI	Typ	Typ	Description of WCM Object	Can be created	Change Possible
	0001	WA	1	Work Permit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	0001	WD	0	Certificate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	0001	WD	T	Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	0001	WW		Work Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>








We recommend that you **activate** "Create" mode for applications.

	PIPI	Typ	Typ	Description of WCM Object	Can be created	Change Possible
	0001	WA	1	Work Permit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	0001	WD	0	Certificate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	0001	WD	T	Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	0001	WW		Work Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

In this IMG activity, you determine which direct processing modes (create, change) to permit for individual maintenance of WCM objects.

## Master Data -> Architecture -> Define Relations

Normally you only need to check the settings!

Change View "Define Relations": Overview						
    						
	PIPI	1st ObjTyp	1st ObjTyp	2nd ObjTyp	2nd ObjTyp	Max. No. Assignments
	0001	WA	1	WD	0	99999999
	0001	WA	1	WW		1
	0001	WD	0	WA	1	99999999
	0001	WW		OR		1
	0001	WW		WA	1	99999999



In this section, you maintain the relations between the WCM objects of WCM. You can define how many WCM objects you want to allow for the individual relationships.

## Master Data -> Architecture -> Do Not Display Dialog Box for Assignments

Normally you only need to check the settings!

**Change View "Do Not Display Dialog Box for Assignments": Overview**

✎ ↶ 📄 📄 📄

Do Not Display Dialog Box for Assignments

PIPI	1st ObjTyp	1st ObjTyp	2nd ObjTyp	2nd ObjTyp	Do Not Display
0001	OR		WW		<input checked="" type="checkbox"/>
0001	WA	1	WD	0	<input type="checkbox"/>
0001	WA	1	WW		<input checked="" type="checkbox"/>
0001	WD	0	WA	1	<input type="checkbox"/>
0001	WW		OR		<input type="checkbox"/>
0001	WW		WA	1	<input type="checkbox"/>









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

## Master Data -> Architecture -> Configure Work Permits



**Change View "Settings for Work Permits": Overview**

New Entries      

Settings for Work Permits

PIPI	Max. No. Assg.	Pushbutton	Copy Rule
0001		<input checked="" type="checkbox"/>	Copy Assignments ▼

Note: If this indicator is set, the pushbutton for work permits is shown in the WCM-relevant order.

In this IMG activity you define the settings for work permits. For example, you define whether the user can assign a work permit to either a WCM-relevant order or individual operations.

## Master Data -> Number Ranges -> Maintain Number Ranges for Work Approval



Number Ranges	
1 <sup>st</sup> Character	(I)nternal, (E)xternal
2 <sup>nd</sup> Character	1...9, A-Z

	Work Approval / Template	Int. Number Range
01	Operational WAP	I1
02	WAP Template	I2

Naming convention!



	From Number	To Number
I1	10.000.000	19.999.999
I2	9.010.000.000	9.019.999.999

Maintain Intervals: Work Approval					
No	From No.	To Number	NR Status	Ext	
I1	000010000000	000019999999	0	<input type="checkbox"/>	
I2	009010000000	009019999999	0	<input type="checkbox"/>	

In this IMG activity, you define the number range for the work approvals. The number for the work approvals can be allocated by the system (internal number range), or you can allocate a number yourself which must lie within an external number range.

## Master Data -> Number Ranges -> Maintain Number Ranges for Applications



Number Ranges	
1 <sup>st</sup> Character	(I)nternal, (E)xternal
2 <sup>nd</sup> Character	1...9, A-Z

**Naming convention!**

	Work Permit / Template	Int. Number Range
1	Work Permit Level 1	I1
2	Work Permit Level 2	I2
3	Template Level 1	I3
4	Template Level 2	I4



	From Number	To Number
I1	10.000.000	19.999.999
I2	20.000.000	29.999.999
I3	9.010.000.000	9.019.999.999
I4	9.020.000.000	9.029.999.999

Maintain Intervals: Application					
No	From No.	To Number	NR Status	Ext	
I1	000010000000	000019999999	0		<input type="checkbox"/>
I2	000020000000	000029999999	0		<input type="checkbox"/>
I3	009010000000	009019999999	0		<input type="checkbox"/>
I4	009020000000	009029999999	0		<input type="checkbox"/>

In this IMG activity, you define the number ranges for the applications. The number for the applications can be allocated by the system (internal number range), or you can allocate a number yourself, which must lie within an external number range.



## Master Data -> Number Ranges -> Maintain Number Ranges for WC Documents



Number Ranges	
1 <sup>st</sup> Character	(I)nternal, (E)xternal
2 <sup>nd</sup> Character	1...9, A-Z

**Naming convention!**

	Certificate/Template	Int. Number Range
01	Isolation & De-Isolation Certificate	I1
02	Confined Space Entry Certificate	I2
03	Box-Up Certificate	I3
04	Radiography Certificate	I4
05	Excavation Certificate	I5
06	Fire Protection Impairment Certificate	I6
07	Road Closure Notification Certificate	I7
08	Bypass/Override Certificate	I8
09	Diving Certificate	I9
10	Waste Transf./Disp./Storage Certificate	IA
11	Isolation & De-Isolation Template	IB
12	Confined Space Entry Template	IC
13	Box-up Template	ID
14	Radiography Template	IE
15	Excavation Template	IF
16	Fire Protection Impairment Template	IG
17	Road Closure Notification Template	IH
18	Bypass/Override Template	II
19	Diving Template	IJ
20	Waste Transf./Disp./Storage Template	IK

In this IMG activity, you define the number ranges for the WC documents. The number for the WC documents can either be allocated by the system (internal number range) or you can allocate a number yourself which must lie within an external number range.



## Master Data -> Number Ranges -> Maintain Number Ranges for WC Documents



	From Number	To Number
I1	10.000.000	19.999.999
I2	20.000.000	29.999.999
I3	30.000.000	39.999.999
I4	40.000.000	49.999.999
I5	50.000.000	59.999.999
I6	60.000.000	69.999.999
I7	70.000.000	79.999.999
I8	80.000.000	89.999.999
I9	90.000.000	99.999.999
IA	100.000.000	109.999.999
IB	9.010.000.000	9.019.999.999
IC	9.020.000.000	9.029.999.999
ID	9.030.000.000	9.039.999.999
IE	9.040.000.000	9.049.999.999
IF	9.050.000.000	9.059.999.999
IG	9.060.000.000	9.069.999.999
IH	9.070.000.000	9.079.999.999
II	9.080.000.000	9.089.999.999
IJ	9.090.000.000	9.099.999.999
IK	9.100.000.000	9.109.999.999

Maintain Intervals: WC Document					
	N..	From No.	To Number	NR Status	Ext
	I1	000010000000	000019999999	0	<input type="checkbox"/>
	I2	000020000000	000029999999	0	<input type="checkbox"/>
	I3	000030000000	000039999999	0	<input type="checkbox"/>
	I4	000040000000	000049999999	0	<input type="checkbox"/>
	I5	000050000000	000059999999	0	<input type="checkbox"/>
	I6	000060000000	000069999999	0	<input type="checkbox"/>
	I7	000070000000	000079999999	0	<input type="checkbox"/>
	I8	000080000000	000089999999	0	<input type="checkbox"/>
	I9	000090000000	000099999999	0	<input type="checkbox"/>
	IA	000100000000	000109999999	0	<input type="checkbox"/>
	IB	009010000000	009019999999	0	<input type="checkbox"/>
	IC	009020000000	009029999999	0	<input type="checkbox"/>
	ID	009030000000	009039999999	0	<input type="checkbox"/>
	IE	009040000000	009049999999	0	<input type="checkbox"/>
	IF	009050000000	009059999999	0	<input type="checkbox"/>
	IG	009060000000	009069999999	0	<input type="checkbox"/>
	IH	009070000000	009079999999	0	<input type="checkbox"/>
	II	009080000000	009089999999	0	<input type="checkbox"/>
	IJ	009090000000	009099999999	0	<input type="checkbox"/>
	IK	009100000000	009109999999	0	<input type="checkbox"/>

In this IMG activity, you define the number ranges for the WC documents. The number for the WC documents can either be allocated by the system (internal number range) or you can allocate a number yourself which must lie within an external number range.



## Master Data -> Number Ranges -> Maintain Number Ranges for Tags



Number Ranges	
1 <sup>st</sup> Character	(I)nternal, (E)xternal
2 <sup>nd</sup> Character	1...9, A-Z

Naming convention!



**Maintain Intervals: Tag**

Icons: Add, Edit, Delete, Print

N..	From No.	To Number	NR Status	Ext
I1	000100000000	000199999999	0	<input type="checkbox"/>








In this IMG activity, you define the number range for the work approvals. The number for the work approvals can be allocated by the system (internal number range), or you can allocate a number yourself which must lie within an external number range.

## Master Data -> Number Ranges -> Assign Number Ranges

We only will use internal number ranges!



Change View "Assign Number Ranges": Overview						
    						
	PIPI	Typ	Typ	Description	Int. NR	Ext. NR
	0001	WA	1	Work Permit	I1	
	0001	WD	0	Certificate	I1	
	0001	WD	T	Template	I1	
	0001	WI		WCD Item	I1	
	0001	WW		Work Approval	I1	

In this IMG activity, you allocate the number ranges (internal and external) to the WCM objects.

## Master Data -> Maintain View Profile

### Define View Profiles

The layout can always be changed!

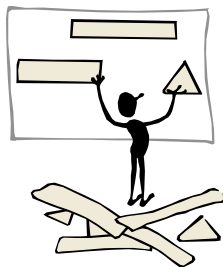


View Profiles	
1 <sup>st</sup> Part	WCM Object e.g. WAP
2 <sup>nd</sup> Part	Hyphen
3 <sup>rd</sup> Part	Usage e.g. 001

	Work Permit / Template	VIEW PROFILE
1	Operational WAP	WAP_O01
2	WAP Template	WAP_T02



Naming convention!



In this IMG activity you define the view profiles for WCM objects. You can use a view profile to set up the entire header data screen of a WCM object according to individual criteria.



# Master Data -> Uses -> Maintain Usages for Work Approvals

## Maintain Uses (SAP ERP 6.0 EhP 6 SP)



Usages	
1 <sup>st</sup> Character	(O)perational, (T)emplate
2 <sup>nd</sup> - 3 <sup>rd</sup> Character	Sequential Number

	Work Approval	USAGE
01	Operational WAP	O01
02	WAP Template	T02



Naming convention!



Change View "Maintain Usages": Overview			
New Entries			
PIPI	Usage	Description of Usage	
0001	O01	Operational WAP	
0001	T02	WAP Template	






PIPI	Usage	Description of Usage	Usage Type	Int. NR	Ext. NR	View Profile	Usage Gen.	Desc. of WCMO	Desc. WCMO (P)
0001	O01	Operational WAP	O	I1		WAP_001		Op. WAP	Op. WAPs
0001	T02	WAP Template	T	I2		WAP_T01	O01	WAP TMPL	WAP TMPLs

In this IMG activity, you define the use for the work approvals.

## Master Data -> Uses -> Maintain Usages for Work Approvals Define Default Value



**Change View "Define Default Value": Overview**

	PIPI	Typ	Typ	Description of WCM Object	Usage
	0001	WW		Work Approval	001

Reason: The Op. WAP should be created automatically.

In this IMG activity, you define the use for the work approvals.

## Master Data -> Maintain View Profile

### Define View Profiles

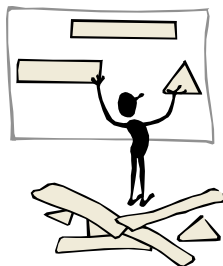
The layout can always be changed!



View Profiles	
1 <sup>st</sup> Part	WCM Object e.g. WAP
2 <sup>nd</sup> Part	Hyphen
3 <sup>rd</sup> Part	Usage e.g. 001

Naming convention!

	Work Permit / Template	VIEW PROFILE
1	Work Permit Level 1	WCA_O01
2	Work Permit Level 2	WCA_O02
3	Template Level 1	WCA_T03
4	Template Level 2	WCA_T04



In this IMG activity you define the view profiles for WCM objects. You can use a view profile to set up the entire header data screen of a WCM object according to individual criteria.





# Master Data -> Uses -> Maintain Usages for Applications

## Maintain Uses (SAP ERP 6.0 EhP 6 SP)



Usages	
1 <sup>st</sup> Character	(O)perational, (T)emplate
2 <sup>nd</sup> - 3 <sup>rd</sup> Character	Sequential Number

Naming convention!

	Work Permit / Template	USAGE
1	Work Permit Level 1	O01
2	Work Permit Level 2	O02
3	Template Level 1	T03
4	Template Level 2	T04



PIPI	Usage	Description of Usage	Usage Type	Int. NR	Ext. NR	View Profile	Usage Gen.	Desc. of WCMO	Desc. WCMO (P)
0001	O01	Work Permit of Level 1	O	I1		WCA_O01		Level 1 WP	Level 1 WPs
0001	O02	Work Permit of Level 2	O	I2		WCA_O02		Level 2 WP	Level 2 WPs
0001	T03	Template of Level 1	T	I3		WCA_T03	O01	Level 1 TMPL	Level 1 TMPLs
0001	T04	Template of Level 2	T	I4		WCA_T04	O02	Level 2 TMPL	Level 2 TMPLs

In this IMG activity, you define the use for the applications.

# Master Data -> Maintain View Profile

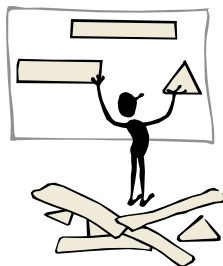
## Define View Profiles

The layout can always be changed!



View Profiles	
1 <sup>st</sup> Part	WCM Object e.g. WAP
2 <sup>nd</sup> Part	Hyphen
3 <sup>rd</sup> Part	Usage e.g. 001

Naming convention!



	Certificate/Template	VIEW PROFILE
01	Isolation & De-Isolation Certificate	WCD_O01
02	Confined Space Entry Certificate	WCD_O02
03	Box-Up Certificate	WCD_O03
04	Radiography Certificate	WCD_O04
05	Excavation Certificate	WCD_O05
06	Fire Protection Impairment Certificate	WCD_O06
07	Road Closure Notification Certificate	WCD_O07
08	Bypass/Override Certificate	WCD_O08
09	Diving Certificate	WCD_O09
10	Waste Transf./Disp./Storage Certificate	WCD_O10
11	Isolation & De-Isolation Template	WCD_T11
12	Confined Space Entry Template	WCD_T12
13	Box-up Template	WCD_T13
14	Radiography Template	WCD_T14
15	Excavation Template	WCD_T15
16	Fire Protection Impairment Template	WCD_T16
17	Road Closure Notification Template	WCD_T17
18	Bypass/Override Template	WCD_T18
19	Diving Template	WCD_T19
20	Waste Transf./Disp./Storage Template	WCD_T20



In this IMG activity you define the view profiles for WCM objects. You can use a view profile to set up the entire header data screen of a WCM object according to individual criteria.



# Master Data -> Uses -> Maintain Usages for WC Documents

## Maintain Uses (SAP ERP 6.0 EhP 6 SP)



Usages	
1 <sup>st</sup> Character	(O)perational, (T)emplate
2 <sup>nd</sup> - 3 <sup>rd</sup> Character	Sequential Number

Naming convention!

	Certificate/Template	USAGE
01	Isolation & De-Isolation Certificate	O01
02	Confined Space Entry Certificate	O02
03	Box-Up Certificate	O03
04	Radiography Certificate	O04
05	Excavation Certificate	O05
06	Fire Protection Impairment Certificate	O06
07	Road Closure Notification Certificate	O07
08	Bypass/Override Certificate	O08
09	Diving Certificate	O09
10	Waste Transf./Disp./Storage Certificate	O10
11	Isolation & De-Isolation Template	T11
12	Confined Space Entry Template	T12
13	Box-up Template	T13
14	Radiography Template	T14
15	Excavation Template	T15
16	Fire Protection Impairment Template	T16
17	Road Closure Notification Template	T17
18	Bypass/Override Template	T18
19	Diving Template	T19
20	Waste Transf./Disp./Storage Template	T20



In this IMG activity, you define the use for the WC documents.

## Master Data -> Uses -> Maintain Usages for WC Documents

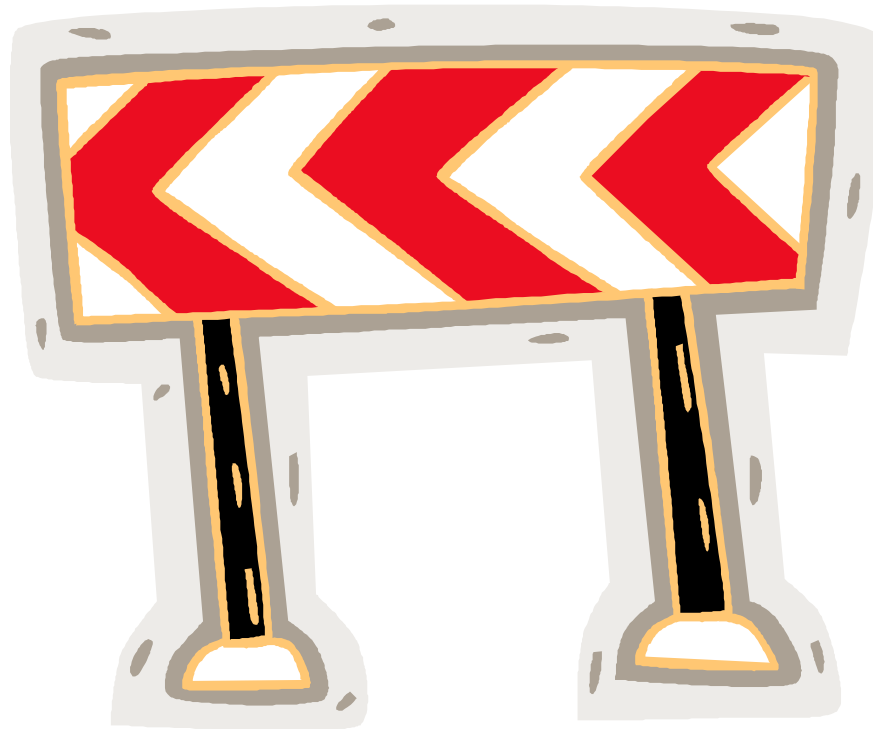
### Maintain Uses (SAP ERP 6.0 EhP 6 SP)



PIPI	Usage	Description of Usage	Spec.	Usage Type	Int. NR	Ext. NR	View Profile	Usage Gen.	Description of WCM Object	Desc. WCMO in Plural
0001	O01	Isolation & De-Isolation Certificate		O	I1		WCD_O01		Iso. & De-Iso. CERT	Iso. & De-Iso. CERTs
0001	O02	Confined Space Entry Certificate	X	O	I2		WCD_O02		Conf. Space Entry CERT	Conf. Space Entry CERTs
0001	O03	Box-up Certificate	X	O	I3		WCD_O03		Box-up CERT	Box-up CERTs
0001	O04	Radiography Certificate	X	O	I4		WCD_O04		Radiography CERT	Radiography CERTs
0001	O05	Excavation Certificate	X	O	I5		WCD_O05		Excavation CERT	Excavation CERTs
0001	O06	Fire Protection Impairment Certificate	X	O	I6		WCD_O06		Fire Prot. Imp. CERT	Fire Prot. Imp. CERTs
0001	O07	Road Closure Notification Certificate	X	O	I7		WCD_O07		Road Closure Notif. CERT	Road Closure Notif. CERTs
0001	O08	Bypass/Override Certificate	X	O	I8		WCD_O08		Bypass/Override CERT	Bypass/Override CERTs
0001	O09	Diving Certificate	X	O	I9		WCD_O09		Diving CERT	Diving CERTs
0001	O10	Waste Transf./Disp./Storage Certificate	X	O	IA		WCD_O10		Waste T/D/S CERT	Waste T/D/S CERTs
0001	T11	Isolation & De-Isolation Template		T	IB		WCD_T11	001	Iso. & De-Iso. TMPL	Iso. & De-Iso. TMPLs
0001	T12	Confined Space Entry Template	X	T	IC		WCD_T12	002	Conf. Space Entry TMPL	Conf. Space Entry TMPLs
0001	T13	Box-up Template	X	T	ID		WCD_T13	003	Box-up TMPL	Box-up TMPLs
0001	T14	Radiography Template	X	T	IE		WCD_T14	004	Radiography TMPL	Radiography TMPLs
0001	T15	Excavation Template	X	T	IF		WCD_T15	005	Excavation TMPL	Excavation TMPLs
0001	T16	Fire Protection Impairment Template	X	T	IG		WCD_T16	006	Fire Prot. Imp. TMPL	Fire Prot. Imp. TMPLs
0001	T17	Road Closure Notification Template	X	T	IH		WCD_T17	007	Road Closure Notif. TMPL	Road Closure Notif. TMPLs
0001	T18	Bypass/Override Template	X	T	II		WCD_T18	008	Bypass/Override TMPL	Bypass/Override TMPLs
0001	T19	Diving Template	X	T	IJ		WCD_T19	009	Diving TMPL	Diving TMPLs
0001	T20	Waste Transf./Disp./Storage Template	X	T	IK		WCD_T20	010	Waste T/D/S TMPL	Waste T/D/S TMPLs


In this IMG activity, you define the use for the WC documents.

## Master Data -> Check Consistency of Master Data




In this IMG activity, you check the consistency of the model you have selected and defined for work clearance management.

## Master Data -> Data Transfer When Creating with Template -> Generate Basic Settings








**Generate Basic Settings**



Planning plant



**Change View "Define Fields": Overview**






New Entries     

	PIPI	Transaction Code	Field	Short Text	Sequence	Display
	0001	WCR1	5	Short text	1	<input checked="" type="checkbox"/>
	0001	WCR1	10	Long text for WCM object	2	<input checked="" type="checkbox"/>
	0001	WCR1	20	Validity period	3	<input checked="" type="checkbox"/>
	0001	WCR1	30	Overall condition of technical system	4	<input checked="" type="checkbox"/>
	0001	WCR1	40	Recall time	5	<input checked="" type="checkbox"/>
	0001	WCR1	50	Reference object	6	<input checked="" type="checkbox"/>
	0001	WCR1	55	Reference object incl. object list	7	<input checked="" type="checkbox"/>
	0001	WCR1	60	Planner group	8	<input checked="" type="checkbox"/>
	0001	WCR1	65	Authorization group	9	<input checked="" type="checkbox"/>
			70			

In this section, you generate the basic settings for data transfer when creating with template.

## Master Data -> Data Transfer When Creating with Template -> Display Dialog Box



Change View "Display Dialog Box": Overview					
    					
	PIPI	Typ	Typ	Description of WCM Object	Display
	0001	WA	1	Work Permit	<input checked="" type="checkbox"/>
	0001	WD	0	Certificate	<input checked="" type="checkbox"/>
	0001	WD	T	Template	<input checked="" type="checkbox"/>
	0001	WW		Work Approval	<input checked="" type="checkbox"/>

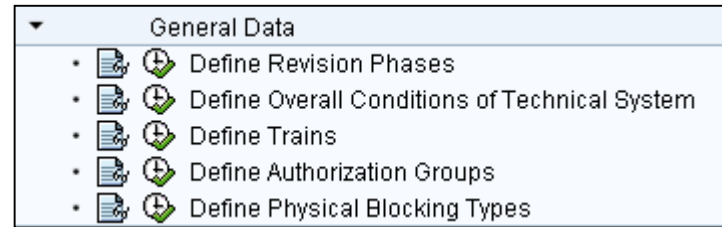


	PIPI	Typ	Typ	Description of WCM Object	Display
	0001	WA	1	Work Permit	<input type="checkbox"/>
	0001	WD	0	Certificate	<input type="checkbox"/>
	0001	WD	T	Template	<input type="checkbox"/>
	0001	WW		Work Approval	<input type="checkbox"/>



In this section you define whether the user should be taken to the dialog box, in which (s)he can see and select the data to be copied, when (s)he uses a template to create a WCM object.

## Master Data -> General Data -> ...

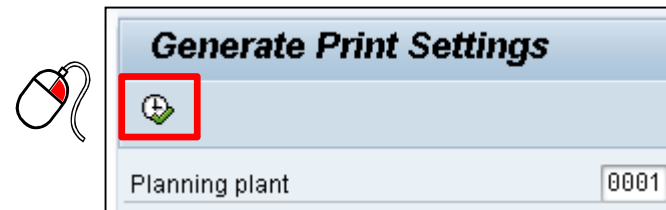


Let's See What Data is Really Required!

...



## Master Data -> Print Control -> Generate Print Settings



**Change View "Define Shop Papers and Layout for Printout": Overview**

New Entries Form

PIPI	Print Category	Print Format	Short Text
0001	Header Data	WAP	Header Data
0001	Header Data	WAPI	Header Data
0001	Header Data	WCD	Header Data
0001	Tagging List		Tagging List
0001	Untagging List		Untagging List
0001	Tag	XXXX	Tag
0001	Test Tag	XXXX	Test Tag
0001	Work Permit	WAP	Work Permit
0001	Work Permit	WAPI	Work Permit
0001	Work Permit	WCD	Work Permit

In this IMG activity, you generate the basic print settings for maintenance planning plants. The program creates basic settings for print formats and reports used for structuring output and layout. The settings can be established for all existing print categories.









## Master Data -> Maintain Application Profile

Be very careful!



**Change View "Maintain Application Profile": Details**

New Entries      

Planning plant  Werk 0001




☐ Valuation WCM Object

☐ WCM Operations

☐ Electric Signature

Validity		
WAP Validity	<input type="text" value="365"/>	Day(s)
Appl. Validity	<input type="text" value="365"/>	Day(s)
WCD Validity	<input type="text" value="365"/>	Day(s)

Field Selection	
<input checked="" type="checkbox"/>	FldSel. WAP
<input checked="" type="checkbox"/>	Fld Sel. Application
<input checked="" type="checkbox"/>	FldSel. WCD

User-Specific Settings	
<input type="checkbox"/> USp. WAP	
<input type="checkbox"/> USp. Application	
<input type="checkbox"/> USp. WC Document	

Automate	
<input checked="" type="checkbox"/>	Release for Exec.
<input type="checkbox"/>	Confirm Completion
<input checked="" type="checkbox"/>	Close WAP
<input type="checkbox"/>	Close Application

Prerequisite for Issuing Release for Execution

Traffic Light

In this IMG activity you define the application profile for WCM.

# Content

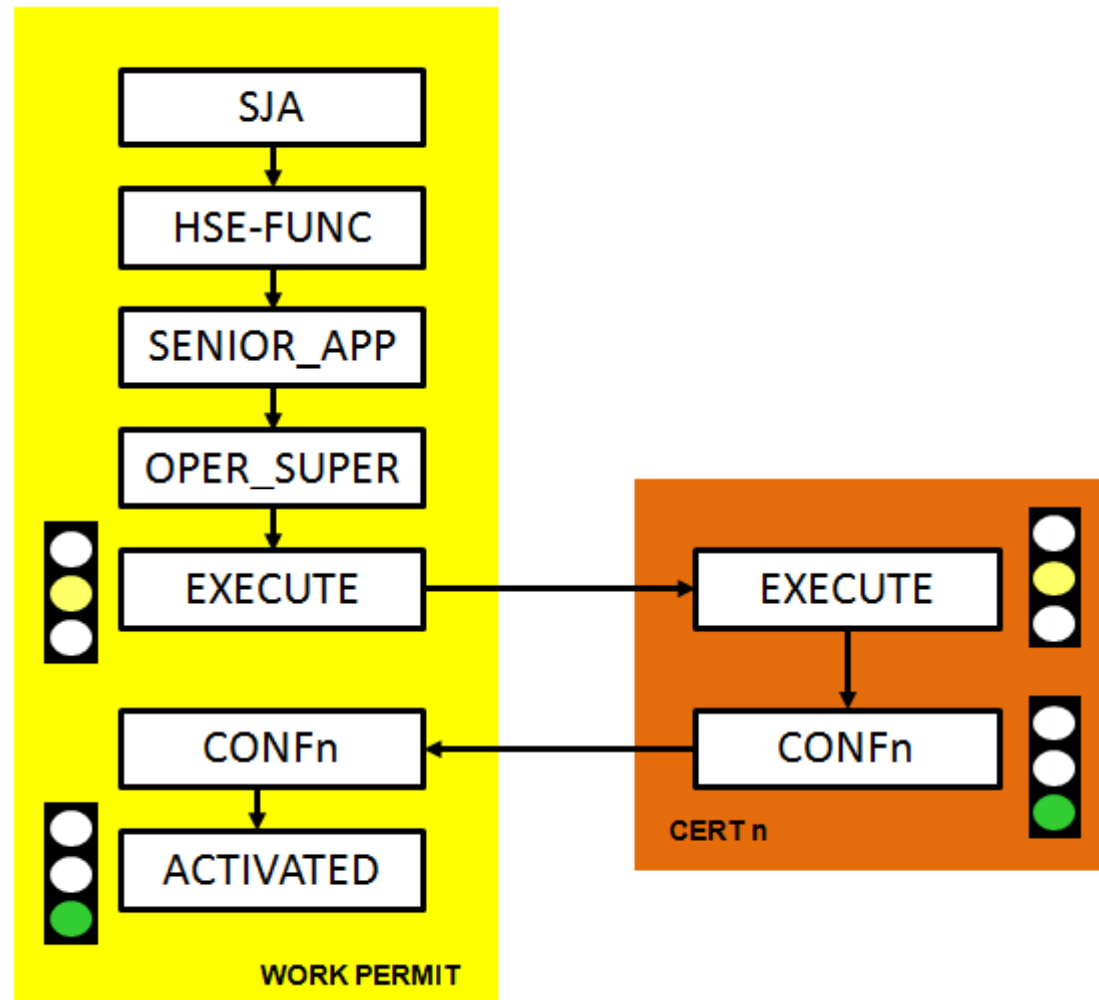
- Master Data
- Approvals
- Lockout / Tagout



▼	Work Clearance Management
▶	Master Data
▼	Approvals
▼	Standard
•	Define Permit Categories
•	Maintain Approvals
▼	Enhancements
•	Assign Approval
•	Define Hierarchy for Approvals
•	Define Cross-Document Approval Process
▶	Block Issuing of Approvals
•	Activate Work Clearance Management for Maintenance Orders
•	Define Approval Groups
•	Assign Processor for Approval Workflow
•	Assign Approvals Based on Usage
▶	Lockout/Tagout
▶	Business Add-Ins

## Approvals Process Across WCM Objects

What we want to do



## Approvals -> Standard -> Define Permit Categories



**Change View "Maintain Permit Categories": Overview**

New Entries

Permit category	Permit Category Text
0	Confirmation
1	Confirmation
2	Confirmation
3	Confirmation
4	Confirmation
5	Confirmation
6	Confirmation
7	Confirmation
8	Confirmation
9	Confirmation
E	Execution
G	General

In this Customizing activity, you define the permit categories. Every permit must be assigned to a permit category.

## Approvals -> Standard -> Maintain Approvals



Display View "Maintain Permits": Overview				
Create/change     Variable list				
Permit	Permit Text	PermitCat.	Permit Category Text	
ACTIVATED	Activated by CCR Operator	6	General	
CONF1	Confirms the Execution	1	Confirmation	
CONF10	Confirms the Execution	0	Confirmation	
CONF2	Confirms the Execution	2	Confirmation	
CONF3	Confirms the Execution	3	Confirmation	
CONF4	Confirms the Execution	4	Confirmation	
CONF5	Confirms the Execution	5	Confirmation	
CONF6	Confirms the Execution	6	Confirmation	
CONF7	Confirms the Execution	7	Confirmation	
CONF8	Confirms the Execution	8	Confirmation	
CONF9	Confirms the Execution	9	Confirmation	
EXECUTE	Released for Execution	E	Execution	
HSE - FUNC	Approved by HSE-Function	6	General	
OPER_SUPER	Approved by Oper. Supervisor	6	General	
SENIOR_APP	Approved by Senior Approver	6	General	
SJA	Safe Job Analysis	6	General	
WCM	Activate WCM	6	General	

In this IMG activity, you define the approvals you need for WCM.

# Approvals -> Enhancements -> Assign Approval



## Change View "Assign Approval": Overview

New Entries

PIPI	Typ	Typ	Permit	Permit Text	PIPI	Typ	Typ	Permit	CopyApprv.Auto.	Mandatory	Revoke Approval	ApprStatus	Issue automatically
0001	WA	1	ACTIVATED	Activated by CCR Operator	0001	WA	1	ACTIVATED			X	X	
0001	WA	1	CONF1	Confirms the Execution	0001	WA	1	CONF1			X		X
0001	WA	1	CONF10	Confirms the Execution	0001	WA	1	CONF10			X		X
0001	WA	1	CONF2	Confirms the Execution	0001	WA	1	CONF2			X		X
0001	WA	1	CONF3	Confirms the Execution	0001	WA	1	CONF3			X		X
0001	WA	1	CONF4	Confirms the Execution	0001	WA	1	CONF4			X		X
0001	WA	1	CONF5	Confirms the Execution	0001	WA	1	CONF5			X		X
0001	WA	1	CONF6	Confirms the Execution	0001	WA	1	CONF6			X		X
0001	WA	1	CONF7	Confirms the Execution	0001	WA	1	CONF7			X		X
0001	WA	1	CONF8	Confirms the Execution	0001	WA	1	CONF8			X		X
0001	WA	1	CONF9	Confirms the Execution	0001	WA	1	CONF9			X		X
0001	WA	1	EXECUTE	Released for Execution	0001	WA	1	EXECUTE			X	X	X
0001	WA	1	HSE - FUNC	Approved by HSE-Function	0001	WA	1	HSE-FUNC			X		
0001	WA	1	OPER_SUPER	Approved by Oper. Supervisor	0001	WA	1	OPER_SUPER			X		
0001	WA	1	SENIOR_APP	Approved by Senior Approver	0001	WA	1	SENIOR_APP			X		
0001	WA	1	SJA	Safe Job Analysis	0001	WA	1	SJA			X		
0001	WD	0	CONF1	Confirms the Execution	0001	WD	0	CONF1		X	X	X	
0001	WD	0	CONF10	Confirms the Execution	0001	WD	0	CONF10		X	X	X	
0001	WD	0	CONF2	Confirms the Execution	0001	WD	0	CONF2		X	X	X	
0001	WD	0	CONF3	Confirms the Execution	0001	WD	0	CONF3		X	X	X	
0001	WD	0	CONF4	Confirms the Execution	0001	WD	0	CONF4		X	X	X	
0001	WD	0	CONF5	Confirms the Execution	0001	WD	0	CONF5		X	X	X	
0001	WD	0	CONF6	Confirms the Execution	0001	WD	0	CONF6		X	X	X	
0001	WD	0	CONF7	Confirms the Execution	0001	WD	0	CONF7		X	X	X	
0001	WD	0	CONF8	Confirms the Execution	0001	WD	0	CONF8		X	X	X	
0001	WD	0	CONF9	Confirms the Execution	0001	WD	0	CONF9		X	X	X	
0001	WD	0	EXECUTE	Released for Execution	0001	WD	0	EXECUTE	X	X	X	X	X

In this section, you assign approvals to the WCM objects.

## Approvals -> Enhancements -> Assign Approvals Based on Usage (SAP ERP 6.0 EhP 6 SP 6)



Change View "Assign Approvals Based on Usage": Overview							
New Entries							
Assign Approvals Based on Usage							
	PIPI	Typ	Typ	Description of WCMO	Usage	Permit	Permit Text
	0001	WA	1	Work Permit	001	ACTIVATED	Activated by CCR Operator
	0001	WA	1	Work Permit	001	EXECUTE	Released for Execution
	0001	WA	1	Work Permit	001	HSE - FUNC	Approved by HSE-Function
	0001	WA	1	Work Permit	001	OPER_SUPER	Approved by Oper. Supervisor
	0001	WA	1	Work Permit	001	SENIOR_APP	Approved by Senior Approver
	0001	WA	1	Work Permit	002	ACTIVATED	Activated by CCR Operator
	0001	WA	1	Work Permit	002	EXECUTE	Released for Execution
	0001	WA	1	Work Permit	002	HSE - FUNC	Approved by HSE-Function
	0001	WA	1	Work Permit	002	OPER_SUPER	Approved by Oper. Supervisor
	0001	WA	1	Work Permit	002	SENIOR_APP	Approved by Senior Approver
	0001	WA	1	Work Permit	003	ACTIVATED	Activated by CCR Operator
	0001	WA	1	Work Permit	003	EXECUTE	Released for Execution
	0001	WA	1	Work Permit	003	HSE - FUNC	Approved by HSE-Function
	0001	WA	1	Work Permit	003	OPER_SUPER	Approved by Oper. Supervisor
	0001	WA	1	Work Permit	003	SENIOR_APP	Approved by Senior Approver
	0001	WD	0	Certificate	001	CONF1	Confirms the Execution
	0001	WD	0	Certificate	002	CONF2	Confirms the Execution
	0001	WD	0	Certificate	003	CONF3	Confirms the Execution
	0001	WD	0	Certificate	004	CONF4	Confirms the Execution
	0001	WD	0	Certificate	005	CONF5	Confirms the Execution
	0001	WD	0	Certificate	006	CONF6	Confirms the Execution
	0001	WD	0	Certificate	007	CONF7	Confirms the Execution
	0001	WD	0	Certificate	008	CONF8	Confirms the Execution
	0001	WD	0	Certificate	009	CONF9	Confirms the Execution
	0001	WD	0	Certificate	010	CONF10	Confirms the Execution

In this IMG activity, you can specify that approvals are assigned automatically based on the usage of a WCM object.



## Approvals -> Enhancements -> Define Hierarchy for Approvals



**Change View "Define Hierarchy for Approvals": Overview**

Define Hierarchy for Approvals

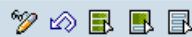
PIPI	Typ	Typ	Short Text	Permit	Permit Text	Hierarchy Level	Revoke Approval
0001	WA	1	Work Permit	ACTIVATED	Activated by CCR Operator	70	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF1	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF10	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF2	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF3	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF4	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF5	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF6	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF7	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF8	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	CONF9	Confirms the Execution	60	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	EXECUTE	Released for Execution	50	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	HSE - FUNC	Approved by HSE-Function	30	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	OPER_SUPER	Approved by Oper. Supervisor	20	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	SENIOR_APP	Approved by Senior Approver	40	<input checked="" type="checkbox"/>
0001	WA	1	Work Permit	SJA	Safe Job Analysis	10	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF1	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF10	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF2	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF3	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF4	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF5	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF6	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF7	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF8	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	CONF9	Confirms the Execution	20	<input checked="" type="checkbox"/>
0001	WD	0	Certificate	EXECUTE	Released for Execution	10	<input checked="" type="checkbox"/>

In this IMG activity, you maintain the hierarchy of approvals belonging to a WCM object. You can also define that approvals issued on the basis of the hierarchy level are automatically revoked.

## Approvals -> Enhancements -> Define Cross-Document Approval Process



### Change View "Define Cross-Document Approval Process": Overview



#### Define Cross-Document Approval Process

PIPI	Typ	Typ	Short Text	Permit	Permit Text	PermitCat.	Permit Category Text	Rel. to Process	Direction
0001	WA	1	Work Permit	ACTIVATED	Activated by CCR Operator	6	General	<input type="checkbox"/>	▼
0001	WA	1	Work Permit	CONF1	Confirms the Execution	1	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF10	Confirms the Execution	0	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF2	Confirms the Execution	2	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF3	Confirms the Execution	3	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF4	Confirms the Execution	4	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF5	Confirms the Execution	5	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF6	Confirms the Execution	6	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF7	Confirms the Execution	7	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF8	Confirms the Execution	8	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	CONF9	Confirms the Execution	9	Confirmation	<input checked="" type="checkbox"/>	Down ▼
0001	WA	1	Work Permit	EXECUTE	Released for Execution	E	Execution	<input checked="" type="checkbox"/>	▼
0001	WA	1	Work Permit	HSE - FUNC	Approved by HSE-Function	6	General	<input type="checkbox"/>	▼
0001	WA	1	Work Permit	OPER_SUPER	Approved by Oper. Supervisor	6	General	<input type="checkbox"/>	▼
0001	WA	1	Work Permit	SENIOR_APP	Approved by Senior Approver	6	General	<input type="checkbox"/>	▼
0001	WA	1	Work Permit	SJA	Safe Job Analysis	6	General	<input type="checkbox"/>	▼
0001	WD	0	Certificate	CONF1	Confirms the Execution	1	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF10	Confirms the Execution	0	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF2	Confirms the Execution	2	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF3	Confirms the Execution	3	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF4	Confirms the Execution	4	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF5	Confirms the Execution	5	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF6	Confirms the Execution	6	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF7	Confirms the Execution	7	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF8	Confirms the Execution	8	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	CONF9	Confirms the Execution	9	Confirmation	<input checked="" type="checkbox"/>	▼
0001	WD	0	Certificate	EXECUTE	Released for Execution	E	Execution	<input checked="" type="checkbox"/>	Up ▼

In this IMG activity, you establish settings for cross-object maintenance of approvals.

## Approvals -> Enhancements -> Block Issuing of Approvals -> Define Dependent on System Status



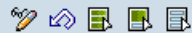
Change View "Define Dependent on System Status": Overview							
Define Dependent on System Status							
PIPI	Typ	Typ	Description of WCM Object	Permit	Permit Text	SysSt.Issue Appvls	
0001	WA	1	Work Permit	ACTIVATED	Activated by CCR Operator		▼
0001	WA	1	Work Permit	CONF1	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF10	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF2	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF3	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF4	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF5	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF6	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF7	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF8	Confirms the Execution		▼
0001	WA	1	Work Permit	CONF9	Confirms the Execution		▼
0001	WA	1	Work Permit	EXECUTE	Released for Execution		▼
0001	WA	1	Work Permit	HSE -FUNC	Approved by HSE-Function		▼
0001	WA	1	Work Permit	OPER_SUPER	Approved by Oper. Supervisor		▼
0001	WA	1	Work Permit	SENIOR_APP	Approved by Senior Approver		▼
0001	WA	1	Work Permit	SJA	Safe Job Analysis		▼
0001	WD	0	Certificate	CONF1	Confirms the Execution	Tagged	▼
0001	WD	0	Certificate	CONF10	Confirms the Execution		▼
0001	WD	0	Certificate	CONF2	Confirms the Execution		▼
0001	WD	0	Certificate	CONF3	Confirms the Execution		▼
0001	WD	0	Certificate	CONF4	Confirms the Execution		▼
0001	WD	0	Certificate	CONF5	Confirms the Execution		▼
0001	WD	0	Certificate	CONF6	Confirms the Execution		▼
0001	WD	0	Certificate	CONF7	Confirms the Execution		▼
0001	WD	0	Certificate	CONF8	Confirms the Execution		▼
0001	WD	0	Certificate	CONF9	Confirms the Execution		▼
0001	WD	0	Certificate	EXECUTE	Released for Execution		▼

In this IMG activity, you establish settings for linking the issue of approvals to the system status of the WCM object.

# Approvals -> Enhancements -> Block Issuing of Approvals -> Define Dependent on Assignments (SAP ERP 6.0 EhP 6 SP 8)



## Change View "Define Dependent on Assignments": Overview



### Define Dependent on Assignments

PIPI	Typ	Typ	Description of WCM Object	Permit	Permit Text	Direction	Assgmt Required	Usage
0001	WA	1	Work Permit	ACTIVATED	Activated by CCR Operator	▼	<input type="checkbox"/>	
0001	WA	1	Work Permit	CONF1	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	001
0001	WA	1	Work Permit	CONF10	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	010
0001	WA	1	Work Permit	CONF2	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	002
0001	WA	1	Work Permit	CONF3	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	003
0001	WA	1	Work Permit	CONF4	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	004
0001	WA	1	Work Permit	CONF5	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	005
0001	WA	1	Work Permit	CONF6	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	006
0001	WA	1	Work Permit	CONF7	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	007
0001	WA	1	Work Permit	CONF8	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	008
0001	WA	1	Work Permit	CONF9	Confirms the Execution	Down ▼	<input checked="" type="checkbox"/>	009
0001	WA	1	Work Permit	EXECUTE	Released for Execution	▼	<input type="checkbox"/>	
0001	WA	1	Work Permit	HSE - FUNC	Approved by HSE-Function	▼	<input type="checkbox"/>	
0001	WA	1	Work Permit	OPER_SUPER	Approved by Oper. Supervisor	▼	<input type="checkbox"/>	
0001	WA	1	Work Permit	SENIOR_APP	Approved by Senior Approver	▼	<input type="checkbox"/>	
0001	WA	1	Work Permit	SJA	Safe Job Analysis	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF1	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF10	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF2	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF3	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF4	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF5	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF6	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF7	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF8	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	CONF9	Confirms the Execution	▼	<input type="checkbox"/>	
0001	WD	0	Certificate	EXECUTE	Released for Execution	Up ▼	<input checked="" type="checkbox"/>	

In this IMG activity, you establish settings for linking the issue of approvals to the assignment of additional WCM objects. Approvals cannot be issued until the appropriate assignment has been made.



## Approvals -> Enhancements -> Activate WCM for Maintenance Orders

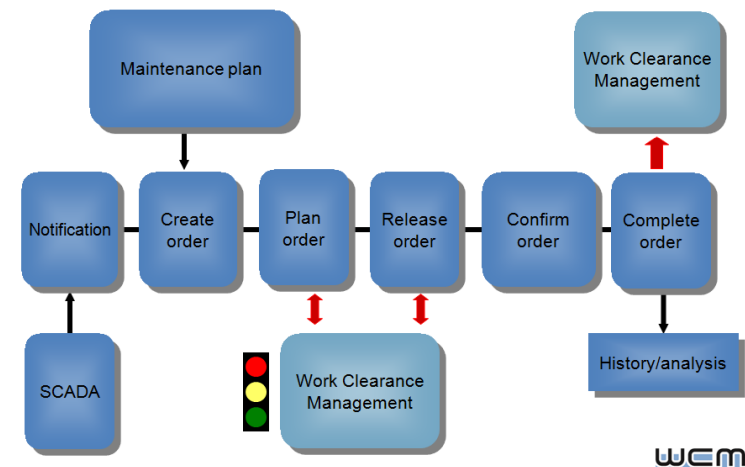


**Change View "Activate Work Clearance Management for Maintenance Orders"**

New Entries

Activate Work Clearance Management for Maintenance Orders

Permit	Permit Text	Typ	Typ	Description of WCM Object
WCM	Activate WCM	WW		Work Approval



WCM

In this IMG activity, you make settings for approvals. You use these to activate the work clearance management functions for maintenance orders. Orders for which work clearance management must be activated are called WCM-relevant orders. Give the permit that activates work clearance management an appropriate name, such as the name of the desired application.

WCM

# Content

- Master Data
- Approvals
- Lockout / Tagout



Work Clearance Management
▶ Master Data
▶ Approvals
▼ Lockout/Tagout
• [Icon] [Icon] Maintain Usage for Work Clearance Documents
▶ Operational Steps
▼ Operational Cycle
• [Icon] [Icon] Maintain Operational Groups
• [Icon] [Icon] Maintain Operational Conditions
• [Icon] [Icon] Maintain Operational Types
• [Icon] [Icon] Maintain Operational Data
• [Icon] [Icon] Check Consistency of Operational Data
• [Icon] [Icon] Define Print Format for Operational Tags
• [Icon] [Icon] Maintain Conflict Rules
▶ Operational Classes
▶ Mobile Processing
▶ Business Add-Ins

## Lockout/Tagout -> Operational Cycle -> Maintain Operational Groups



**Change View "Maintain Operational Groups": Overview**

New Entries

	Operational Group	Text for Operational Group
<input type="checkbox"/>	E	Electrical
<input type="checkbox"/>	M	Mechanical



In this IMG activity, you define the operational groups for your company. Operational groups serve to categorize operational conditions.

## Lockout/Tagout -> Operational Cycle -> Maintain Operational Conditions



Change View "Maintain Operational Conditions": Overview		
New Entries		
Op. Condition	Text for Operational Condition	
BLOCKED	Blocked	
BUILD-IN	Build In	
CLOSE	Close	
CONNECT	Connect	
DISCONNECT	Disconnect	
DISMANTLE	Dismantle	
GROUNDING	Grounded	
OFF	Off	
ON	On	
OPEN	Open	
PLUG	Plug	
UNBLOCKED	Unblocked	
UNGROUNDING	Ungrounded	
UNPLUG	Unplug	



In this IMG activity, you define all operational conditions that you want to use in your company as tagging conditions or untagging conditions.



## Lockout/Tagout -> Operational Cycle -> Maintain Operational Types



Change View "Maintain Operational Types": Overview		
New Entries		
Operational Type	Text for Operational Type	
X	Single Value	



In this IMG activity, you define the operational types you wish to use in your company. Operational types enable greater differentiation between operational conditions for tagging and untagging.



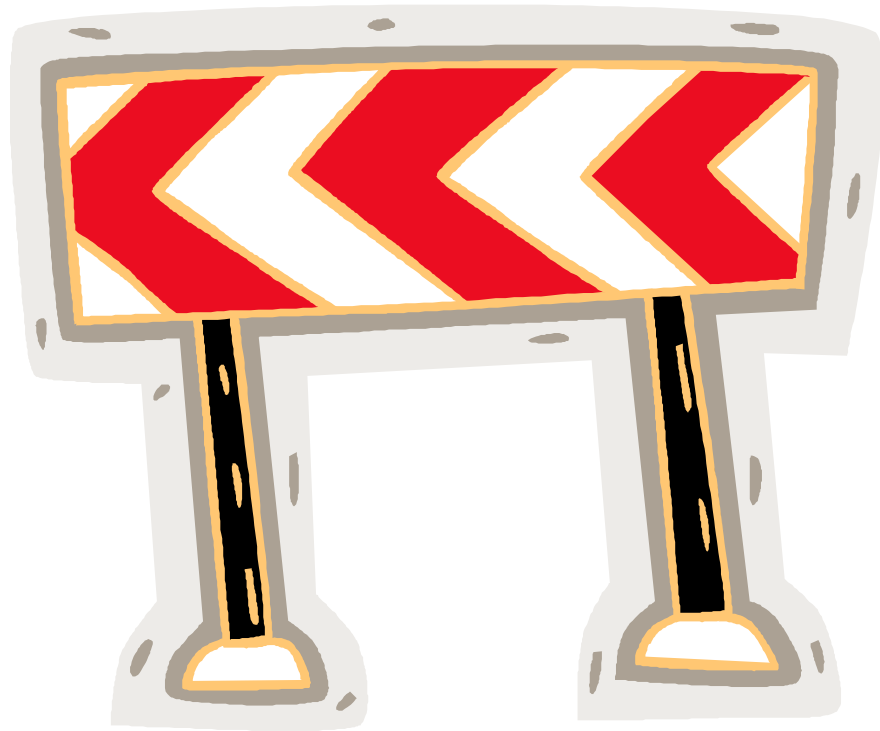
## Lockout/Tagout -> Operational Cycle -> Maintain Operational Data



Change View "Maintain Operational Data": Overview									
New Entries									
PIPI	Op. Group	Tag. Cond.	Tag. Type	UntagCond.	Untag.Type	Phys. Blocking Req.	Tag Required	Use as	
0001	E	CONNECT	X	DISCONNECT	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	DISCONNECT	X	CONNECT	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	GROUND	X	UNGROUND	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	OFF	X	ON	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	ON	X	OFF	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	PLUG	X	UNPLUG	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	UNGROUND	X	GROUND	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	E	UNPLUG	X	PLUG	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	M	BLOCKED	X	UNBLOCKED	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	M	BUILD-IN	X	DISMANTLE	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	M	CLOSE	X	OPEN	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	M	DISMANTLE	X	BUILD-IN	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	M	OPEN	X	CLOSE	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	
0001	M	UNBLOCKED	X	BLOCKED	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Operational condition ▼	

In this IMG activity, you determine the data valid in your company for tagging and for untagging.

## Lockout/Tagout -> Operational Cycle -> Check Consistency of Operational Data



You can use this IMG activity to check if the data settings for the switch are correct.

## Master Data -> Print Control -> Define Shop Papers and Layout for Printout



Print Format for Operational Tags	
1 <sup>st</sup> Character	Operational Group e.g. M
2 <sup>nd</sup> - 4 <sup>th</sup> Character	Sequential Number e.g. 001

Naming convention!

Change View "Define Shop Papers and Layout for Printout": Overview				
New Entries      Form				
PIPI	Print Category	Print Format	Short Text	
0001	Header Data	▼ WAP	Header Data	
0001	Header Data	▼ WAPI	Header Data	
0001	Header Data	▼ WCD	Header Data	
0001	Tagging List	▼	Tagging List	
0001	Untagging List	▼	Untagging List	
0001	Tag	▼ E001	Electrical Tag	
0001	Tag	▼ M001	Mechanical Tag	
0001	Test Tag	▼ E001	Electrical Test Tag	
0001	Test Tag	▼ M001	Mechanical Test Tag	
0001	Work Permit	▼ WAP	Work Permit	
0001	Work Permit	▼ WAPI	Work Permit	
0001	Work Permit	▼ WCD	Work Permit	

You must **replace** the proposed values.

In this IMG activity, you can define the various shop papers and determine their print layout.

## Lockout/Tagout -> Operational Cycle -> Define Shop Papers and Layout for Printout



Change View "Define Print Format for Operational Tags": Overview					
New Entries					
PIPI	Print Format for Tag	Operational Group	Tag. Type	Print Format for TT	
0001	E001	E	X	E001	
0001	M001	M	X	M001	

In this IMG activity, you define default print formats for operational tags. In addition, you use this IMG activity to assign a print format for a test tag to each print format of a tag.

## Lockout/Tagout -> Maintain Conflict Rules



P1P1	OG	1st OpCond	1st OpTyp	2nd OpCond	2nd OpTyp	Msg.typ	Short Text	MTyp
<input type="checkbox"/> 0001	M	BLOCKED	X	BLOCKED	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	M	BUILD-IN	X	BUILD-IN	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	M	CLOSE	X	CLOSE	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	M	DISMANTLE	X	DISMANTLE	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	M	OPEN	X	OPEN	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	M	UNBLOCKED	X	UNBLOCKED	X	N	Note	<input checked="" type="checkbox"/>

P1P1	OG	1st OpCond	1st OpTyp	2nd OpCond	2nd OpTyp	Msg.typ	Short Text	MTyp
<input type="checkbox"/> 0001	E	CONNECT	X	CONNECT	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	DISCONNECT	X	DISCONNECT	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	GROUND	X	GROUND	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	OFF	X	OFF	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	ON	X	ON	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	PLUG	X	PLUG	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	UNGROUND	X	UNGROUND	X	N	Note	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0001	E	UNPLUG	X	UNPLUG	X	N	Note	<input checked="" type="checkbox"/>

In this IMG activity, you specify the user-defined conflict rules that are used in the operational cycle.

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