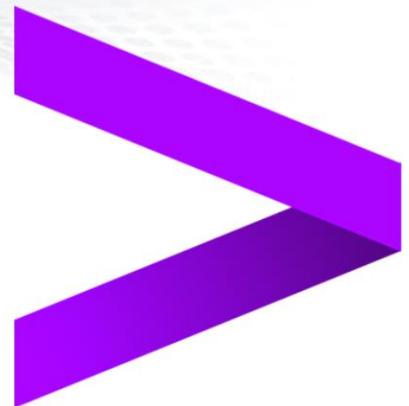


**SAP (IAM)**

**Intelligent  
Asset  
Management**



## **Creating A Recommendation**

## Document Control

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## Reference Documents

The following section describes relevant documentation:

Document Name	Description	Sharepoint Link
Risk and Criticality Assessment	Configuring risk and criticality templates	<a href="#">Creating A Recommendation.pdf</a>

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## 1.Creating A Recommendation

### 1.1 Objective:

After completing this lesson, you will be able to create actionable recommendations based on the results of assessments, ensuring that they align with asset management objectives and industry standards.

### 1.2 Key Terms, Used in This Lesson:

1. **Strategy Assessments:** An evaluation process to suggest appropriate responses to asset failure, conducted at an asset class level.
2. **RCM (Reliability Centered Maintenance) Assessments:** A systematic process to determine the maintenance requirements of physical assets in their operating context.
3. **Recommendation Workbench:** A feature within APM where users can create, manage, and review recommendations.
4. **Recommendation Status:** The current state of a recommendation, indicating its progress from creation to potential release for use.
5. **Planning Plant:** An organizational unit within APM where maintenance planning activities are performed.
6. **Failure Data Profile:** A collection of data related to how and why assets may fail, which can be linked to recommendations.
7. **Failure Data:** Information pertaining to the causes and effects of asset failure.
8. **Proactive Type and Subtype:** Categories within a recommendation that define the nature of the suggested action, such as preventive maintenance.
9. **Operating Context and Condition:** Specific conditions under which an asset operates, which can affect its failure risk and the applicability of recommendations.

### 1.3 Lesson Overview: Creation of Recommendations

Recommendations are used within Strategy Assessments and RCM Assessments within they are valid responses, are not valid responses, or need further improvement. Recommendations can fall under multiple status types. The Recommendation statuses are listed below.

- **Created** - Recommendation just made with no further changes made
- **In Process** - Recommendation has some changes made to it but has not been evaluated yet.
- **For Review** - Recommendation is ready for another colleague to evaluate
- **On Hold** - Recommendation is in reserve but is not currently being looked at for evaluation
- **Rejected** - Recommendation will not be used
- **Ready for Release** - Recommendation accepted and needs final review before release
- **Released** - Recommendation is accepted for use

In addition to changing Recommendation Status, users can make various modifications to a Recommendation, such as adding in additional information pertaining to the Recommendation, assigning and removing Technical Objects from the Recommendation, and viewing the Associated Failure Data in a Recommendation.

### 1.4 DEMO:

On the main page of APM, choose the Manage Recommendations tile. The tile is in the Assessment Management tab and should be the fifth tile in the row. If not present, you should also be able to locate the tile by going to the search bar at the top, typing "**Recommendation Workbench**" in the search field, and then hitting the search button.

SAP Home ▾

Asset Data and Information Management   Asset Risk Assessment   **Asset Reliability Engineering**   Asset Health Monitoring   Asset Performance Analysis

**Asset Reliability Engineering**

- Manage FMEA Assessments
- Manage RCM Assessments
- Manage Recommendations** (highlighted with a red dashed box, showing 8 items)
- Implement Recommendations
- Manage Strategy Assessment for Classes

**Asset Health Monitoring**

- Monitor Alerts (0)
- View Technical Objects (Inspections)
- View Work Orders (Inspections)
- Manage Technical Object Connectivity
- Manage Alert Types
- Manage Rules (0)

SAP Recommendation Workbench ▾

Search:  Search by Type:

Type	Subtype	Status	Impact On Business	Source	Assessment
Search: <input type="text"/>	<input type="button" value="Create"/>	<input type="button" value="Delete"/>	<input type="button" value="Filter"/>	<input type="button" value="MS"/>	

Recommendations (4984) Standard ▾

Check	Recommendation	Type	Subtype	Cycle	Maintenance Activity Type	Planning Plant	Financial Risk	Cost Impact	Technical Objects Assigned	Status
<input type="checkbox"/>	Replace Bolts in Motor	(PROACTIVE)	Condition			Plant 0001 (0001)		1 Object	In Process	<input type="button" value="&gt;"/>
<input type="checkbox"/>	Replace_Bolt									
<input type="checkbox"/>	Vibration analysis	(PROACTIVE)	Condition			Plant 0001 (0001)		1 Object	Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	REC-01223									
<input type="checkbox"/>	Regular inspection	(PROACTIVE)	Calendar	6 Months	Inspection	Plant 0001 (0001)		1 Object	Released	<input type="button" value="&gt;"/>
<input type="checkbox"/>	REC-0090									
<input type="checkbox"/>	Testrecommendation	(PROACTIVE)	Calendar						Rejected	<input type="button" value="&gt;"/>
<input type="checkbox"/>	RCMD_DESC	(IMPROVEMENT)				Plant 0001 (0001)		2 Objects	Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	AUT_RCMD_0745267									
<input type="checkbox"/>	RCMD_DESC	(REACTIVE)							Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	AUT_RCMD_1137509									
<input type="checkbox"/>	RCMD_DESC	(PROACTIVE)	Calendar			Plant 0001 (0001)		1 Object	Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	AUT_RCMD_3647227									
<input type="checkbox"/>	RCMD_DESC	(PROACTIVE)	Performance						Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	AUT_RCMD_4695823									
<input type="checkbox"/>	RCMD_DESC	(PROACTIVE)	Calendar			Plant 0001 (0001)			Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	AUT_RCMD_8127716									
<input type="checkbox"/>	RCMD_DESC	(PROACTIVE)	Condition						Created	<input type="button" value="&gt;"/>
<input type="checkbox"/>	AUT_RCMD_457026									
<input type="checkbox"/>	Testrecommendation	(RECOMMENDATION)							Rejected	<input type="button" value="&gt;"/>

In the Manage Recommendations page, you can see the recommendations previously made. Recommendations can be created from a Strategy Assessment, an RCM Assessment, or just on its own. To create a Recommendation by itself, choose the Create button on the right side of the page underneath the filters.

The screenshot shows the SAP Recommendation Workbench interface. On the left, there is a list of existing recommendations, including "Replace Belts in Motor" and "Vibration analysis". On the right, a modal window titled "Create Recommendation" is open. It contains fields for "Recommendation" (set to "Lubricate\_Motor\_Bearings"), "Description" (set to "Lubricate the Bearings in the Motor"), "Type" (set to "Proactive"), and "Subtype" (set to "Calendar"). At the bottom of the modal is a "Create" button. To the right of the modal, a table titled "Technical Objects Assigned" lists several objects with their status: "1 Object In Process", "1 Object Created", "1 Object Released", "2 Objects Created", "1 Object Created", "Created", "Created", and "Created".

Fill out the **Recommendation**, **Description**, and **Type fields** for your **Recommendation**. If a Proactive Type is chosen as the Recommendation type, an additional Subtype needs to be selected as well. With all necessary fields filled in, choose the Create button at the bottom of the pop up.

The screenshot shows the details of a recommendation named "Lubricate the Bearings in the Motor". The "General Data" tab is active. Key information includes:

- Status:** Created
- Type:** Proactive
- Subtype:** Calendar
- Financial Risk:** No Data
- Cost Impact:** No Data
- Technical Objects Assigned:** (Listed below)

The "Assignments" tab is also visible, showing fields for "Description", "Type", "Subtype", "Cycle", "Maintenance Activity Type", "Priority", "Discipline", and "Impact On Business". The "Organizational Data" tab shows "Planning Plant: Brazilian plant BRTM 2 (BRTZ)" and "Maintenance Plant: Plant 0005 (0005)".

## Modify Recommendation Fields:

The Recommendation will now be created and should open to the edit page. In this page, we have significantly more fields that we can add into the assessment. In this page, implement all necessary additions and changes to the General Data of the Recommendation. Once finished, choose the **Save** button on the right of the page to apply all new changes.

Lubricate the Bearings in the Motor  
Lubricate\_Motor\_Bearings

**General Data**

**Financial Risk**

Current Risk:  USD

Remaining Risk:  USD

Notes:

**Cost Impact**

Estimated Cost:  USD

Estimated Maintenance Savings:  USD

Notes:

**Validity**

Valid From: Mar 1, 2023

Valid To: Sep 1, 2023

**Recommendation Notes**

**SAP Recommendation Workbench**

Lubricate the Bearings in the Motor  
Lubricate\_Motor\_Bearings

Status: Created      Financial Risk: No Data      Cost Impact: No Data

Type: Proactive      Subtype: Calendar

Technical Objects Assigned:

**General Data**

Description: \*

Long Description:

Type: \*

Subtype: \*

Cycle:  Months (MON)

Maintenance Activity Type: Preventive maintenance

Priority: 2: High (Z)

Discipline: Mechanical

Impact On Business: Unit Shutdown

**Organizational Data**

Planning Plant: Brazilian plant BRTM 2 (BRTZ)

Maintenance Plant: Plant 0005 (0005)

**Save** **Cancel**

Lubricate the Bearings in the Motor  
Lubricate\_Motor\_Bearings

Status: Created  
Type: Proactive  
Subtype: Calendar  
Technical Objects Assigned:

Financial Risk  
Current Risk: 10000  
Remaining Risk: 2000  
USD

Cost Impact  
Estimated Maintenance Savin... 1500  
Estimated Cost 2500  
USD

Change Status In Process Manage

**General Data**

Description: Lubricate the Bearings in the Motor  
Long Description:  
Planning Plant: Brazilian plant BRTM 2 (BRTZ)  
Maintenance Plant: Plant 0005 (0005)

Type: Proactive  
Subtype: Calendar  
Cycle: 6 Months

Maintenance Activity Type: Preventive maintenance  
Priority: 2: High (2)  
Discipline: Mechanical  
Impact On Business: Unit Shutdown

**Organizational Data**

Cost Impact  
Estimated Cost: 2500.00 USD  
Estimated Maintenance Savings: 1,500.00 USD

Validity  
Valid From: Feb 28, 2023  
Valid To: Aug 31, 2023

We can go back and make further changes if desired by choosing the Edit button on the right of the page. If Financial Risk and Cost Impact are added into the assessment, we can see a graphic for each at the top of the page. One thing we should also do is change the status of the Recommendation to In Process to denote that work is currently being done on it. The status of the Recommendation also needs to be set to In Process for it to be later set to other statuses. Choose the Change Status button on the top right of the page and choose the In Process sub button that appears underneath it.

Lubricate the bearings in the motor  
Lubricate\_Motor\_Bearings

Type: Proactive  
Subtype: Calendar  
Technical Objects Assigned:

Financial Risk  
Current Risk: 10000  
Remaining Risk: 2000  
USD

Cost Impact  
Estimated Maintenance Savin... 1500  
Estimated Cost 2500  
USD

Status  
In Process

**Information** Technical Objects

**General Data**

Description: Lubricate the bearings in the motor  
Long Description:  
Type: Proactive  
Subtype: Calendar  
Cycle: 6 months

Maintenance Activity Type: Preventive maintenance (002)  
Priority: 2: High (2) / \$1  
Discipline: Mechanical

Change Status

We can also assign a Technical Object to the Assessment as well. Choose the **Technical Objects** tab to **Assign a Technical Object** to the Recommendation.

Lubricate the bearings in the motor

Manage Recommendations ▾

Information ▾ **Technical Objects**

No Technical Objects have been assigned yet

When they have been, you'll see them here

Assign Technical Object(s)

In the Technical Objects tab, we need to add a Technical Object to the Recommendation. Choose the Assign Technical Object(s) button at the center of the page to add in a new Technical Object.

Select Technical Objects

Search:  Go Hide Filter Bar Restore Filters (1)

Technical Object Type	Category	Object Type	Maintenance Plant	Planning Plant	Planner Group	Criticality	Cost Center
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Main Work Center	Class	Status	Superior Functional Location	Superordinate Equipment	Sort Field	Failure Data Profile	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Technical Objects (0)

Technical Object	Category	Object Type	Model Number	Manufacturer	Superior Functional Location	Criticality	Status
No data							

OK Cancel

A list of Technical Objects should now appear on the page. If a Planning Plant was selected in the General Data Tab for the Recommendation, it will automatically be applied to the filter here. If no Technical Objects appear, either remove or change the Planning Plant in the Technical Object.

Technical Object	Category	Object Type	Model Number	Manufacturer	Superior Functional Location	Criticality	Status
SERVO MOTOR - 10 10000070	Customer equipment (S)				FLOC with Warranty (17101)		At customer site
SERVO MOTOR 10000071	Customer equipment (S)				FLOC with Warranty (17101)	Crit Safety/Health (I)	At customer site
BD_Motor 10496604	Machines (M)	Object Type 1000 (1000)					Allocated to superior equipment
<input checked="" type="checkbox"/> Motor1 10405256	Machines (M)	Motor (B031)	AM321	Siemens	Power Plant - ZX11 (ZX11)	High (A)	Allocated to superior equipment
Motor Descriptions en1 10496024	Machines (M)				Standard Env (E)	Available	
SERVO MOTOR 10496018	Machines (M)					Available	
SERVO MOTOR 10496017	Customer equipment (S)					Available	
SERVO MOTOR 10494059	Machines (M)					Available	

Assuming Technical Objects do appear on the page, check the Technical Objects you wish to use and then choose the OK button on the bottom left of the page to assign them to the Recommendation. Use other filters as well to locate a specific Technical Object.

Technical Object	Category	Object Type	Functional Location	Risk Score	Criticality	Maintenance Plant	Planning Plant	Failure Data Profile
<input checked="" type="checkbox"/> Motor1 10405256	Machines (M)	Motor (B031)	Power Plant - ZX11 (ZX11)	02.0	High (A)	Plant 0001 (0001)	Plant 0001 (0001)	Failure Data for Motor (AM-PP-MOT)

The Technical Object is now assigned to the Recommendation. We can assign more Technical Objects to the Recommendation by choosing the Assign button on the right of the page. We can remove a Technical Object by checking the box to the left of the Technical Object and choosing the Remove button.

Lubricate the Bearings in the Motor  
Lubricate\_Motor\_Bearings

Status: In Process  
Type: Proactive  
Subtype: Calendar  
Technical Objects Assigned: 1 Object

**Financial Risk**

Current Risk:	10000
Remaining Risk:	2000
USD:	2000

**Cost Impact**

Estimated Maintenance Savings:	1500
Estimated Cost:	2500
USD:	2500

**General Data**   **Assignments**

Description: Lubricate the Bearings in the Motor  
Long Description:

Type: Proactive  
Subtype: Calendar  
Cycle: 6 Months

Maintenance Activity Type: Preventive maintenance  
Priority: 2: High (2)  
Discipline: Mechanical  
Impact On Business: Unit Shutdown

**Organizational Data**

Planning Plant: Plant 0001 (0001) **(highlighted)**  
Maintenance Plant: Plant 0005 (0005)

**Financial Risk**

Current Risk: 10,000.00 USD  
Remaining Risk: 2,000.00 USD

**Cost Impact**

Estimated Cost: 2,500.00 USD  
Estimated Maintenance Savings: 1,500.00 USD

**Validity**

Valid From: Feb 28, 2023  
Valid To: Aug 31, 2023

In the General Data tab, the Planning Plant field is automatically assigned to the same one associated with the Technical Object we are working with.

Lubricate the Bearings in the Motor  
Lubricate\_Motor\_Bearings

Status: In Process  
Type: Proactive  
Subtype: Calendar  
Technical Objects Assigned: 1 Object

**Financial Risk**

Current Risk:	10000
Remaining Risk:	2000
USD:	2000

**Cost Impact**

Estimated Maintenance Savings:	1500
Estimated Cost:	2500
USD:	2500

**General Data**   **Assignments**

Description: Lubricate the Bearings in the Motor  
Long Description:

Type: Proactive  
Subtype: Calendar  
Cycle: 6 Months

Maintenance Activity Type: Preventive maintenance  
Priority: 2: High (2)  
Discipline: Mechanical  
Impact On Business: Unit Shutdown

**Organizational Data**

Planning Plant: Plant 0001 (0001) **(highlighted)**  
Maintenance Plant: Plant 0005 (0005)

**Financial Risk**

Current Risk: 10,000.00 USD  
Remaining Risk: 2,000.00 USD

**Cost Impact**

Estimated Cost: 2,500.00 USD  
Estimated Maintenance Savings: 1,500.00 USD

**Validity**

Valid From: Feb 28, 2023  
Valid To: Aug 31, 2023

**Change Status**

- For Review
- Rejected

## 1.5 Change Recommendation Statuses:

Recommendations can be set to one of the many different statuses that were discussed at the beginning of this guide. Note that if not done so already, change the status of the incident from Created to In Process. With the Recommendation set to In Process, we can again set it to other statuses from there. Depending on the status, you can change to a certain group of other statuses or no other statuses at all. The first status we are going to change to is For Review. Choosing the **Change Status** button and then the For Review sub button underneath it.

General Data		Assignments	
Description: Lubricate the Bearings in the Motor	Type: Proactive	Maintenance Activity Type: Preventive maintenance	
Long Description:	Subtype: Calendar	Priority: 2: High (2)	
	Cycle: 6 Months	Discipline: Mechanical	
		Impact On Business: Unit Shutdown	
<b>Organizational Data</b>			
Planning Plant: Plant 0001 (0001)	Cost Impact	Validity	
Maintenance Plant: Plant 0005 (0005)	Estimated Cost: 2,500.00 USD	Valid From: Feb 28, 2023	
	Estimated Maintenance Saving: 1,500.00 USD	Valid To: Aug 31, 2023	
Notes: Risk may be greater	Notes: Savings may be greater		

The status of the Recommendation has now been changed to For Review. The status of the Recommendation is noted on the top left of the page underneath the Recommendation name and description. We can change the status again if we want to. Choose the Change Status button again. You will notice that there are new options to change the status to. In the For Review Status, we can now change it to Ready for Release, In Process, On Hold, or Rejected. The In Process and For Review statuses have swapped with one another and the Ready for Release status has been added here. **Change the status** to On Hold.

The screenshot shows a SAP Recommendation Workbench interface. At the top, there's a header with the SAP logo and the title "Recommendation Workbench". Below the header, the main content area displays a recommendation card for "Lubricate the Bearings in the Motor" (Object ID: Lubricate\_Motor\_Bearings).

**General Data:**

- Description: Lubricate the Bearings in the Motor
- Type: Proactive
- Subtype: Calendar
- Technical Objects Assigned: 1 Object

**Financial Risk:**

Category	Value
Current Risk	10000
Remaining Risk	2000
USD	USD

**Cost Impact:**

Category	Value
Estimated Maintenance Savings	1500
Estimated Cost	2500
USD	USD

**Maintenance Activity Type:** Preventive maintenance

**Priority:** 2: High (2)

**Discipline:** Mechanical

**Impact On Business:** Unit Shutdown

**Change Status:** A dropdown menu is open, showing three options: "In Process", "Rejected", and "On Hold".

Again, the status has been changed. Notice that the Edit button in the Recommendation has disappeared. It is not possible to edit a Recommendation under this status. Looking back at the Change Status button again, it can only be changed to two options now, In Process and Rejected. If we want to edit the Recommendation again, the status must be changed back to In Process. We are going to change the Recommendation here from On Hold to Rejected. Choose the Change Status button and then choose Rejected.

This screenshot shows the same SAP Recommendation Workbench interface as the previous one, but the status has been changed to "Rejected". The rest of the data remains the same.

**General Data:**

- Description: Lubricate the Bearings in the Motor
- Type: Proactive
- Subtype: Calendar
- Technical Objects Assigned: 1 Object

**Financial Risk:**

Category	Value
Current Risk	10000
Remaining Risk	2000
USD	USD

**Cost Impact:**

Category	Value
Estimated Maintenance Savings	1500
Estimated Cost	2500
USD	USD

**Maintenance Activity Type:** Preventive maintenance

**Priority:** 2: High (2)

**Discipline:** Mechanical

**Impact On Business:** Unit Shutdown

With the Recommendation Rejected, it is no longer possible to edit the Recommendation and the status cannot be changed anymore. Technical Objects also cannot be assigned to this Recommendation anymore. The Recommendation will remain in APM under this status.

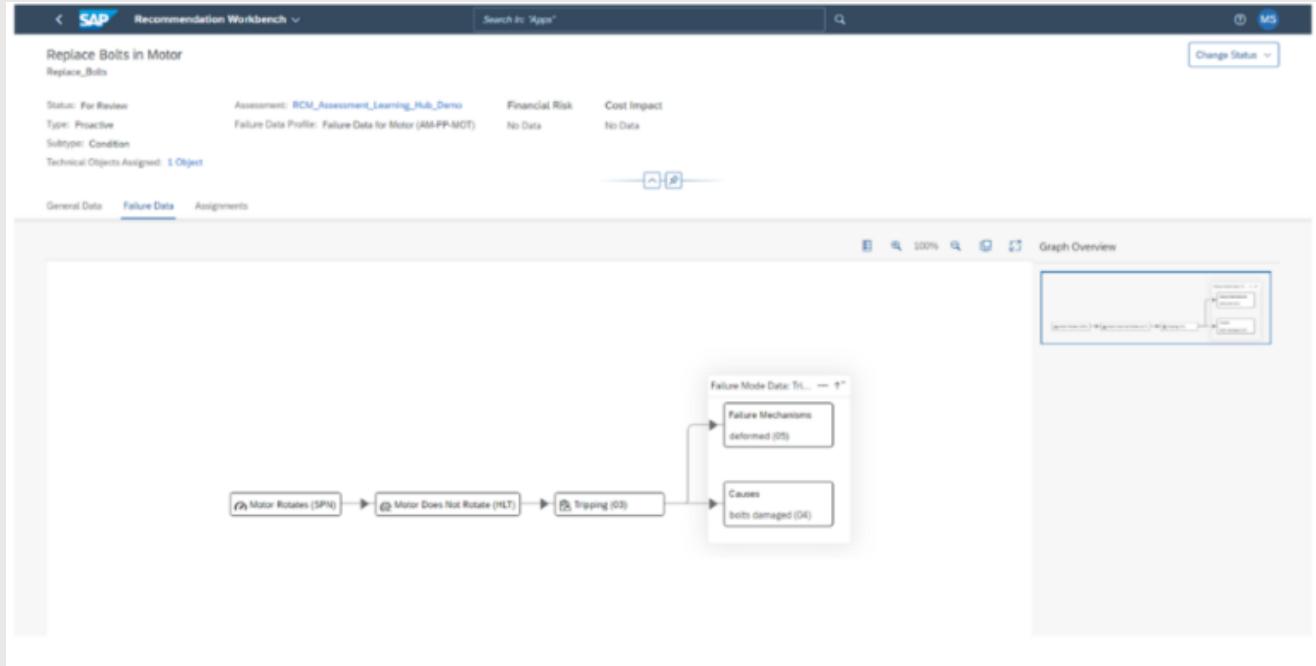
The screenshot shows the SAP Recommendation Workbench interface for a recommendation titled "Replace Bolts in Motor". The "Failure Data" tab is currently selected, indicated by a red border around the tab name. The page displays various details about the recommendation, including its status (For Review), assessment (RCM\_Assessment\_Learning\_Hub\_Demo), and failure data profile (Failure Data for Motor (AM-PP-MOT)). The "Failure Data" tab contains sections for General Data, Failure Data, and Assignments. The General Data section includes fields for Description, Long Description, Type, Subtype, Maintenance Activity Type, Priority, Discipline, and Impact On Business. The Failure Data section includes fields for Classification, Financial Risk, Cost Impact, Validity, and Notes. The Assignments section is currently empty.

### 1.6 Failure Data Tab and more Recommendation Statuses:

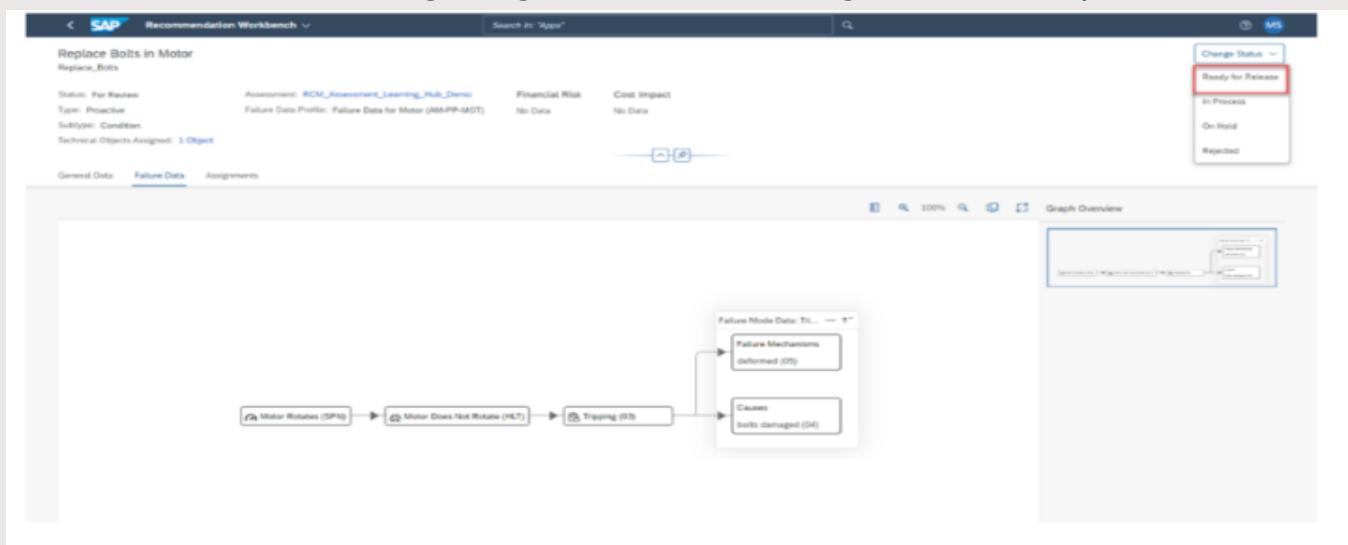
Here is another Recommendation I previously created from an RCM Assessment. Because I created this Recommendation from an Assessment, there is a new tab that to choose from, the Failure Data tab. In this tab, there is a visual displaying the Failure Catalogs that are associated with this Recommendation. Choose the Failure Data tab on the left side of the page to the right of the General Data tab.

The screenshot shows the SAP Recommendation Workbench interface for the same recommendation. The "Failure Data" tab is selected. A visual titled "Graph Overview" displays a flowchart of failure catalogs. The flowchart starts with "Motor Rotates (SPN)" and leads to "Motor Does Not Rotate (PLT)". From "Motor Does Not Rotate (PLT)", it branches to "Tripping (TR)" and "Failure Mode Data: Th...". The "Failure Mode Data: Th..." node has a red border, indicating it is the current node being viewed. The "General Data" and "Assignments" tabs are also visible at the bottom of the screen.

In this tab, the specific Failure Catalogs that were assigned to the Assessment in which the Recommendation was created appear in the graphic. For my Recommendation, I show the Function, Functional Failure, Failure Mode, and a grouping of Failure Data that was assigned under the Failure Mode here.



Choosing the Expand/Collapse button on the Failure Mode Data graphic shows me the specific Failure Catalogs I assigned here. I only have two Failure Catalogs assigned within my Failure Mode, the Failure Mechanism, and the Cause, with the Failure Effect not being assigned as I didn't assign it here in my Assessment.



Assuming that the Recommendation is now good for release, the status of the Recommendation must be changed to reflect that. Assuming that the status of this Recommendation is set to For Review, choose the Change Status button and set it to Ready for **Release**.

The screenshot shows the SAP Recommendation Workbench interface. At the top, there's a navigation bar with the SAP logo, the title 'Recommendation Workbench', a search bar, and a user icon. Below the header, there's a summary card for a recommendation titled 'Replace Bolts in Motor'. The card displays the following details:

- Status:** Ready for Release
- Assessment:** RCM\_Assessment\_Learning\_Hub\_Demo
- Failure Data Profile:** Failure Data for Motor (AM-PP-MOT)
- Type:** Proactive
- Subtype:** Condition
- Financial Risk:** No Data
- Cost Impact:** No Data
- Technical Objects Assigned:** 1 Object

Below the summary card, there are tabs for 'General Data', 'Failure Data', and 'Assignments'. The 'General Data' tab is active, showing fields like Description (Replace Bolts in Motor), Type (Proactive), Subtype (Condition), and Maintenance Activity Type. There are also sections for Classification, Organizational Data, Financial Risk, Cost Impact, and Validity.

A prominent feature is a 'Change Status' button on the right side of the screen, which has a dropdown menu. The menu items are 'Released' (which is highlighted with a red box), 'In Process', 'On Hold', and 'Rejected'. The 'Released' option is the intended choice to finalize the recommendation.

Choose the Change Status button again and set the status to Released to finalize the Recommendation for official use. The Recommendation has now been released. Like a rejected Recommendation, the status cannot be changed any further and the Recommendation cannot be edited.

## 1.7 Conclusion

### 1.7.1 Objective:

To understand how to create and manage recommendations in Asset Performance Management (APM) for responding to asset failures, and to learn how to navigate through various recommendation statuses and modifications.

### 1.7.2 Overview:

Recommendations guide responses to asset failures and their status indicate the stage of development or implementation within an organization. A recommendation can progress through several statuses from creation to release.

### 1.8 Steps:

#### 1. Creating a Recommendation:

- Access the Manage Recommendations from the Assessment Management tab.
- Create a new Recommendation independently or from within an existing Strategy or RCM Assessment
- Fill in the Recommendation details, including type and subtype for proactive measures.

#### 2. Modifying Recommendation Fields:

- On the Recommendation edit page, input all necessary data.
- Save the information to preserve the changes.
- Adjust the Recommendation status to In Process indicating active development.

#### 3. Assigning Technical Objects:

- Go to the Assignments tab to link Technical Objects to the Recommendation.
- Apply filters to find and select the correct Technical Objects, then assign them.

#### 4. Changing Recommendation Statuses:

- Progress the Recommendation through various statuses such as For Review, On Hold, or Rejected based on internal evaluations.

- Each status change may alter the available actions, such as editing or assigning Technical Objects.

#### 5. Failure Data Tab:

- For Recommendations linked to an Assessment, the Failure Data tab visualizes the associated failure catalogs.
- Review the assigned Failure Catalogs to ensure they align with the Recommendation's intent.

#### 6. Releasing the Recommendation:

- Once a Recommendation is validated, update the status to Ready for Release and then to Released.
- A Released Recommendation is finalized for use and cannot be edited or have its status changed.

Possible Recommendation Statuses are:

- Created: Newly generated, no edits made.
- In Process: Under development, changes being made.
- For Review: Ready for peer evaluation.
- On Hold: Reserved, not actively reviewed.
- Rejected: Deemed unsuitable for use.
- Ready for Release: Approved, pending final review.
- Released: Officially approved for use.

### 1.9 Outcome:

Understanding the flow from creation to release of Recommendations allows users to systematically evaluate and implement strategies for asset failure responses. The status of each Recommendation reflects its stage in the lifecycle and determines the actions that can be taken.