



UNIVERSITY OF DELAWARE
**FACILITIES, REAL ESTATE
& AUXILIARY SERVICES**

Maximo User Guide

Rev. 2.1 – 10/8/2020

This guide is designed for both novice and experienced Maximo users who will be using Maximo modules to manage work orders.

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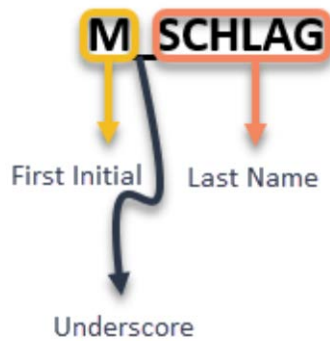
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1.0 Introduction

Maximo is a CMMS (Computerized Maintenance Management System), or an EAM (Enterprise Asset Management) system. It is produced by IBM, and the University of Delaware has been using the system actively since 2009. The University tracks all work, both unscheduled and scheduled, within the system along with all equipment (assets), locations, and mechanics. With this information we can better manage the work that comes into our department and our existing workload.

2.0 Log in Screen

The picture on the right shows the standard Maximo log in screen. The user name is typically in the following format:

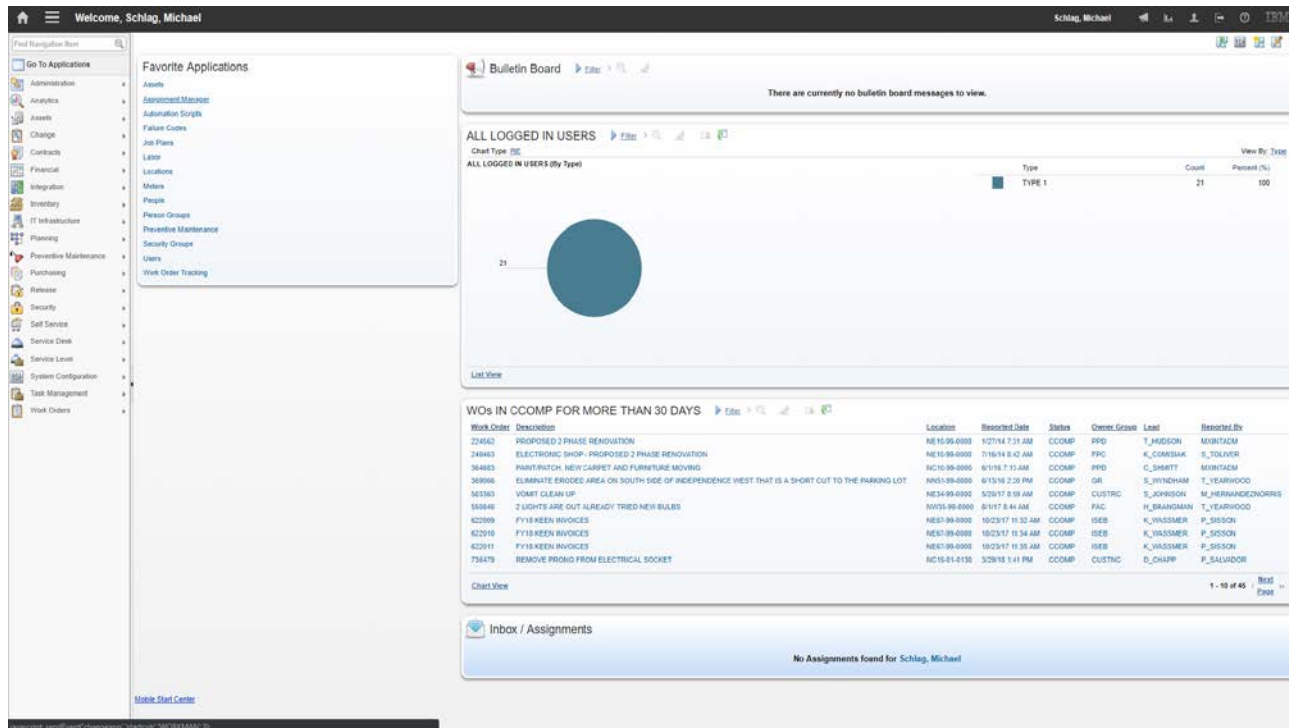


Maximo is associated with your FREAS account. Enter your FREAS user name and password.

If you don't have access to the Maximo system, and believe you should, please have your supervisor contact the CMMS Administrator.

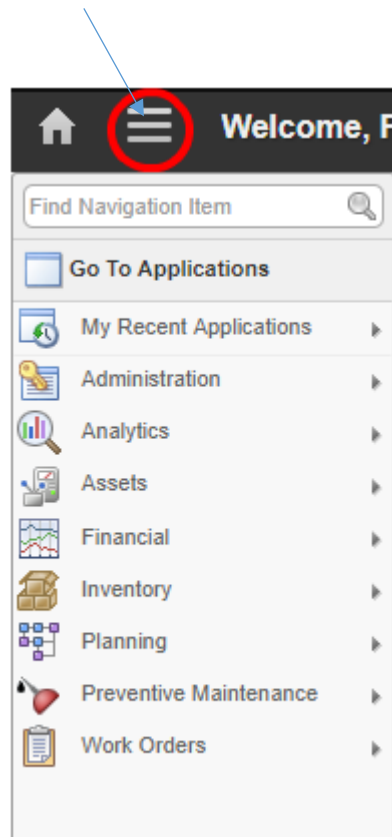
3.0 Start Center

Once you log into Maximo, the first screen you will see is the Start Center. Depending on your role in Maximo, your start center may look different than the start center for other users. Some things are universal and will be explained in this section.



3.1 Go To Menu

The Go To Menu is the main navigation device in Maximo. From this menu, a user with acceptable permissions can navigate to and access any application or location within Maximo.



3.2 Start Center

The Start Center link will return the user to the Start Center from whenever a user is in the application.



3.3 Reports

Similar to the Go To menu, the Reports menus allows navigation to any application a user has access to in Maximo. Instead of navigating to the selected application, the Report menu for that application is shown.



3.4 Profile

In the Profile section, a user will find the following information.



3.4.1 Default Information

- **Default insert site** allows a user to change their site.
- **Storeroom Site** allows a user to change the storeroom site for a specific site.
- **Default Storeroom Site** allows a user to determine what the default storeroom for a specific site is.
- **User Default Application** When set, that chosen application is automatically opened when a user logs into the system.
- **Language** changes the language preference for the user.
- **Locale** dictates the date format and currency for the user.
- **Calendar Type** the type of calendar the user uses (Gregorian, Islamic).
- **Time Zone** the time zone the user resides in.
- **Site navigation**
Note: None of these settings should be changed except side navigation.

3.4.2 Personal Information

- **Primary Phone** – The primary phone number used to contact the user.
- **Primary Email** – The primary email address used to contact the user.
- **Primary SMS*** – The primary SMS code used to contact the user. **This function is not utilized.*
- **Workplace Information**
 - **Person’s Site** the site to which the user belongs.
 - **Person’s Location** the location for the user at that site.
 - **Ship to address** the shipping address of the user.
 - **Drop Point** the drop location for making deliveries.
- **Procurement Card**
 - **Card #** number of the credit card used for procurement.
 - **Card Type** the type of credit card (MasterCard, Visa, etc.)
 - **Verification Value** the 3-4 digit code on the back of the credit card.
 - **Expiration Date** the date on which the credit card expires.

Note: None of these values should be changed without approval from CMMS Administrator.

3.5 Sign Out

Use this option to properly sign out or quit the Maximo program.

3.6 Help*

Contains various help subjects for general topics. **This function is not specific to the University of Delaware’s Maximo system.*

3.6.1 Maximo Asset Management Help

This is the broad overview help system for the Maximo system.

3.6.2 “Current Page Help”

Specific help for the current page in Maximo. For example, this will display Work Order Tracking Help when the user is in the work order app.

3.6.3 [IBM Electronic Support](#)

Link to the IBM support portal.

3.6.4 [System Information](#)

Contains system information about the different environments related to Maximo.

- App Server and version
- Software versions
 - IBM Maximo Asset Management
 - Tivoli's process automation engine
 - IBM TPAE Integration Framework
- Server OS and version
- Server DB and version



3.7 [Start Center settings](#)

All of the following entries are related to the functionality and layout of the Start Center.



3.7.1 [Change Content/Layout](#)

This allow for the user to change what portlets (explained below) are shown in their personal Start Center.

3.7.2 [Display Settings](#)

Allows to change the display order of the Start Center tabs.

3.7.3 [Create New Template](#)

This is used to create a new Start Center template and is only visible with certain security rights.

3.7.4 [Modify Existing Template](#)

Used to modify an existing Start Center template and is only visible with certain security rights.

3.7.5 Update Start Center

Can be used to reset an existing Start Center. ***Warning*** This action will reset all content on a user's Start Center.

3.8 Portlets

Portlets are what show various information on the Start Center. This section will go into the different types of portlets.

3.8.1 Bulletin Board

The Bulletin Board is used to create critical, or important messages that can be show to the entire user base. Examples would be scheduled outages, upcoming upgrades, and database refresh dates.

3.8.2 Favorite Applications

This portlet provides a list of shortcuts to different applications in Maximo. Instead of using the Go To menu, a user could use the Favorite Applications portlet to quickly navigate to the Work Order Tracking application.

3.8.3 Inbox/Assignments

Users can view communications that are generated by workflow processes and escalations. The University is currently using this functionality in very limited cases, such as alerting members of the SEE Owner Group they have work orders assigned to them.

3.8.4 KPIs

KPI stands for Key Performance Indicator and is used to track important measures over time. They are available in graph or list form.

3.8.5 Quick Insert

This portlet is similar to Favorite Applications with links to a certain application to quickly create a record. For example, if you are always creating new work orders, you may have a link that goes directly to New Record in the Work Order Tracking application.

3.8.6 Result Sets

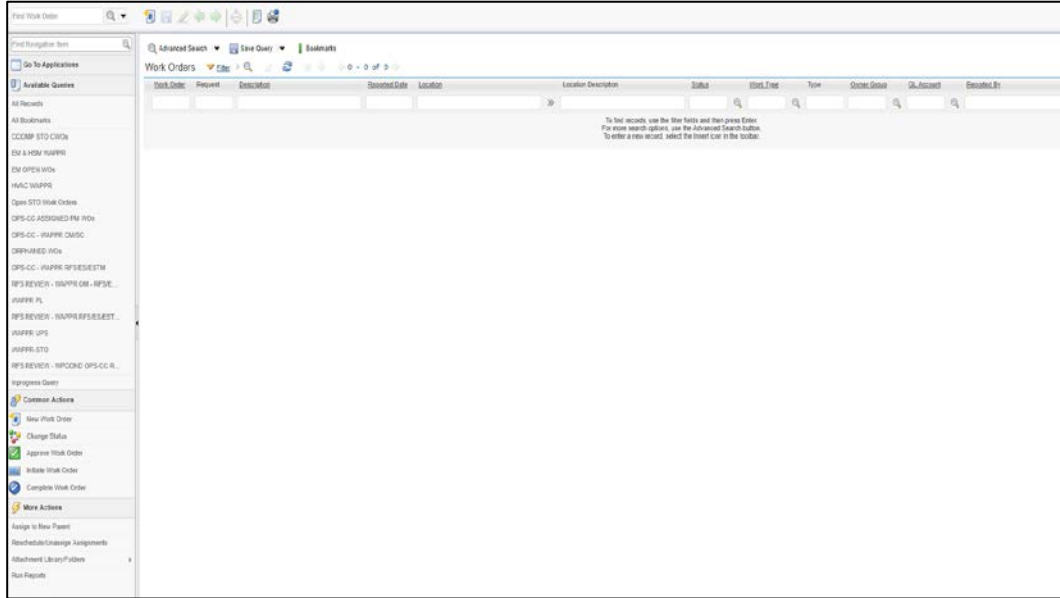
Result Sets are the product of saved queries from various applications within Maximo. The columns presented in the Result Sets can be chosen from a list of available columns.

4.0 Work Order Tracking

The Work Order Tracking application is where the bulk of activity in Maximo takes place. This is where a user would view, create and update them.

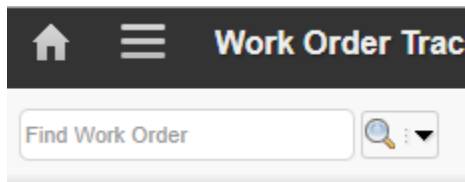
4.1 Work Order Tracking List Tab

This is the default tab that is shown when a user first navigates to the Work Order Tracking application. The example below shows a typical example of a list tab with results displayed.



4.1.1 Direct Search Box

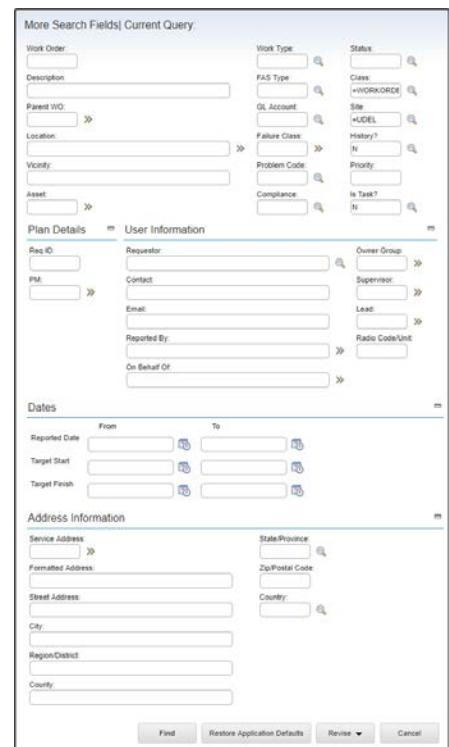
This is the quickest way to go to a specific work order if the work order number is known. Type in the work order number, press the enter key and if found, the work order will be displayed on the Work Order tab immediately.



4.1.2 More Search Fields Spy Glass Icon a.k.a. Advanced Search

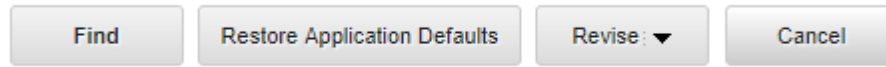
Clicking on the spy glass icon next to the Direct Search box will bring up More Search Field, or Advanced Search window which has many different work order fields available for search. The drop-down arrow shows options:

- **More Search fields window** (Shown to the right)
- **Where clause** (Allows the where clause to be viewed and edited.)
- **Attribute search** (Allows searching by specific attributes)
- **View Search tips** (Help page that shows various searching tips)
- **Save Current Query** (Ability to save the current search criteria as a query for availability later).
- **View/Manage Queries** (Displays a new window of all saved queries, and allows deletion or changes, to be made).
- **Bookmarks** (Displays a window of all the saved work orders as bookmarks).



4.1.2.1 More Search Fields buttons

This section will talk about the buttons on the bottom of the More Search Fields window.



4.1.2.1.1 Find

Find will execute the query with the current field criteria in the More Search Fields window.

4.1.2.1.2 Restore Application Defaults

This button will return the default values for the following fields.

- **Class** (=WORKORDER) – Leave as default
- **Site** (=UDEL) – Leave as default
- **History** (N) – Exclude canceled, closed, or other archived work orders. This is used for viewing current work orders.
- **Is Task?** (N)
- **Y** = Include those work orders. – This is used when older records are needed.

4.1.2.1.3 Revise

The Revise button has four options.

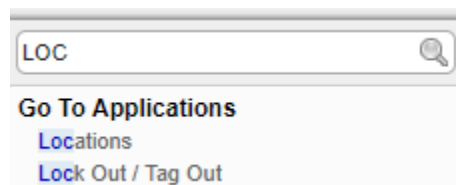
- **Clear Query and Fields** – This option removes the current query and clears all the fields.
- **Clear all Fields** – This option retains the current query but clears all fields. Clear All Fields has the same effect as the Restore Application Defaults button if there is no default query specified for the application.
- **Change Query** – This option opens a new dialog box which has the same contents as the View/Manage Queries window in that application. You can select a query against which the More Search Fields parameters are applied.
- **Restore Default Query** – This option restores your personal default query, but does not affect any fields.

4.1.2.1.4 Cancel

This will cancel any search that is queued to run, and close the More Search Fields window.

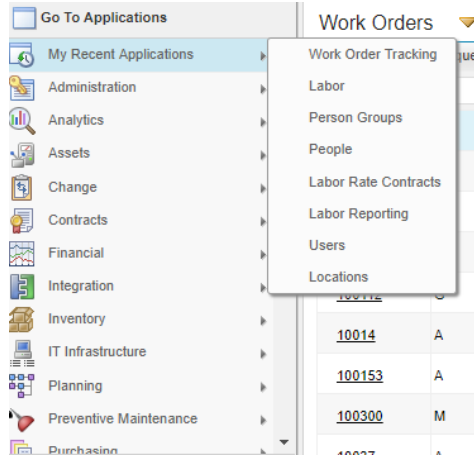
4.1.3 Find Navigation Item

From this search box, you can start typing in the name of an application to quickly find another application. Such as “LOC” for locations.



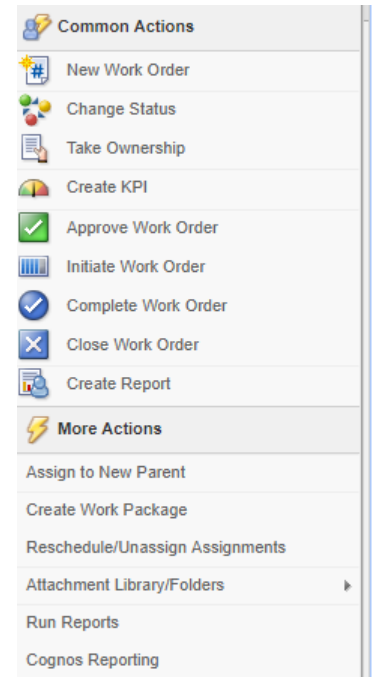
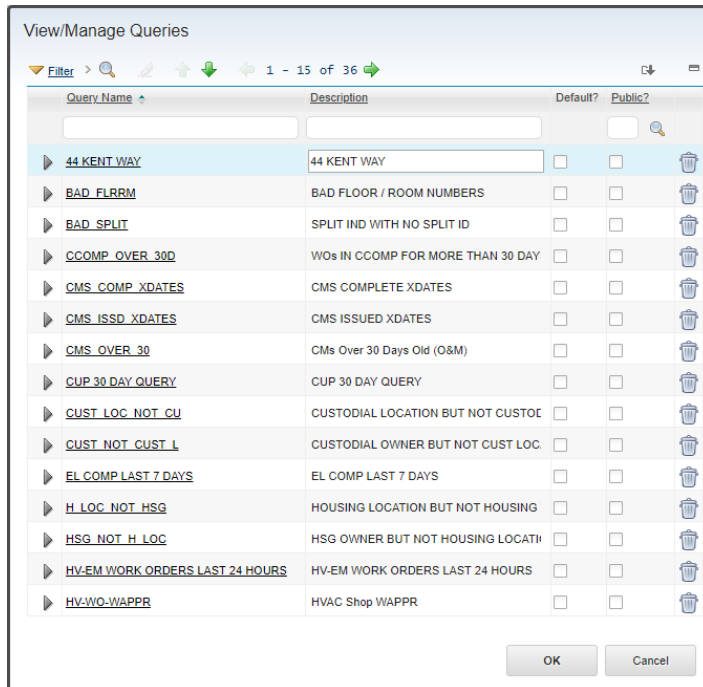
4.1.4 Go To Applications

This section is minimized by default. Includes the normal Go To menu and My Recent Applications which keeps a list of recently used applications in case you want to quickly switch back to a recent one.



4.1.5 Available Queries

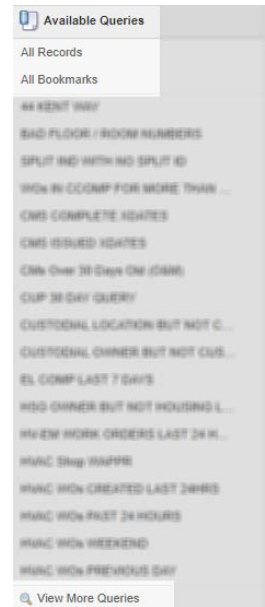
Any saved queries, as well as options to show all records in the result set list window, and to show all bookmarks. At the bottom of the Available Queries, there is an option to View More Queries if the user has more queries that can be displayed in the window. If selected, a pop-up window will show all the queries the user has.



4.1.6 Select Action Menu

The Select Action menu, on the left by default, contains different actions you can take depending on the tab of the work order. On the Work Order list screen the options are very limited. Those that pertain to University of Delaware's usage of Maximo include:

- **Change Status** – Allows the bulk changing of statuses on the Work Order List screen.
- **Assign New Parent** – Can change multiple work order parent work orders at the same time.
- **Run Reports** – Use this to access the report menu for Work Order Tracking.



4.1.7 Icons

The following icons are available on the Work Order List tab.

1. New Work Order
2. Save Changes
3. Clear Changes
4. Previous Records
5. Next Record
6. Route Work Flow
7. Browser View: Work Order List
8. Direct Print: UDEL Work Order Detail
9. Direct Print: UDEL Work Order Detail Lite



Number 3 is not used very often, number 6 is not currently being used at the University and also depends on user security privileges, number 7 opens an HTML report containing all the records of the result set currently displayed and numbers 8 and 9 should work.

4.1.8 Advance Search Drop Down menu

This menu provides searching by using multiple fields, a Structured Query Language (SQL) where clause, and finally an attribute search.

4.1.8.1 More Search Fields

When opened, the More Search Fields window contains many more fields that can be used to filter and limit the results in the list screen.

4.1.8.2 Where Clause

The Where Clause allows advanced users to use SQL language to tailor the query to get the results they want.

4.1.8.3 Attribute Search

This allows a user to search by specific attributes, but is not set up to be used at this time by the University of Delaware.



4.1.8.4 View Search Tips

This opens the help page to show various searching tips.

4.1.9 Save Query Drop Down

The save Query Drop Down window allows the user to save a current query or view and manage the queries that are available to them.

4.1.9.1 Save Current Query

This is how a user can save a currently displayed query. A query can be saved as a private, public or default query. The University of Delaware does not use public queries. A default query would be a query that runs automatically when the Work Order Tracking application is loaded.

4.1.9.2 View/Manage Queries

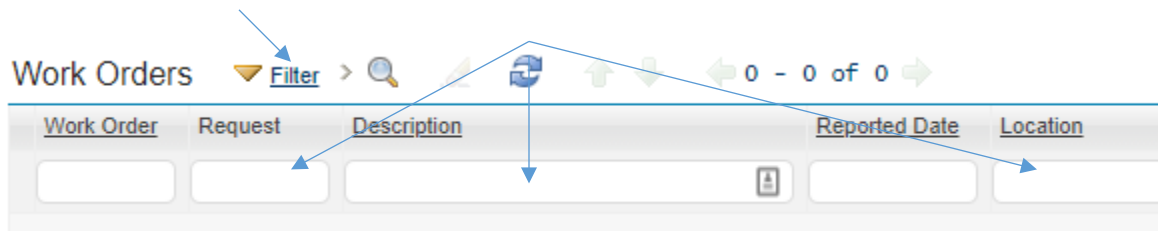
With this option, a user can view all the queries in their profile, including the where clause that makes up that query. Also allows the deletion of the query.

4.1.10 Bookmarks

Just like in a web browser, certain work orders can be bookmarked to come back to at a later time if needed.

4.1.11 Filter Toggle

The filter toggle allows the display of the filter row of the work order list screen.



4.1.12 Filter Search

Allows quick filter search of the current result set. An example would be searching for Gore Hall in the Location Description field to filter out anything that isn't Gore Hall.

Work Order	Request	Description	Reported Date	Location	Location Description
					GORE HALL
<i>101945</i>	A	LIGHTS OUT	4/13/17 8:19 AM	NC36	GORE HALL
<i>111712</i>	A	SEVERAL LIGHTS ARE OUT	4/24/17 12:38 PM	NC36	GORE HALL
<i>114150</i>	D	TWO LIGHTS OUT	5/3/17 11:29 AM	NC36-GR	GORE HALL - POD (DINING)
<i>1156</i>	A	REPLACE CEILING LIGHT BULBS	5/18/17 3:44 PM	NC36	GORE HALL
<i>125821</i>	A	REPLACE CEILING LIGHT BULBS	5/18/17 4:08 PM	NC36	GORE HALL

4.1.13 Refresh

When a work order is changed in a result set, it is represented by a blue italicized font on the list screen like in the example below, but the updated information is not shown.

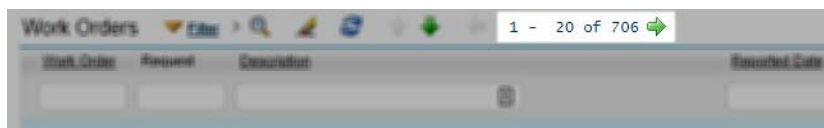
Work Orders Filter > 1 - 20 of 706

Work Order	Request	Description	Reported Date	Location	Location Description
					GORE HALL
<i>101945</i>	A	REWIND STATOR ON GENERATOR	10/4/11 1:20 PM	NC36-99-0000	GORE HALL
<i>111712</i>	A	RPLC LOCKS AT GORE HALL BATHROOMS	12/5/11 2:12 PM	NC36-99-0000	GORE HALL
<i>114150</i>	A	ADD CHEMICAL BYPASS FEEDERS TO VARIOUS HYDONIC SYSTEMS	12/21/11 3:07 PM	NC36-99-0000	GORE HALL
<i>1156</i>	A	NECESSARY MAINTENANCE ASSOCIATED WITH THE EXTERIOR METAL	1/17/08 12:00 AM	NC36-99-0000	GORE HALL
<i>125821</i>	A	exterior power washing East, West and south steps -FY12 INT/EXT PAINT	3/21/12 10:01 AM	NC36-99-0000	GORE HALL
<i>132851</i>	A	FY13 REPAIR MASONRY LANDING	5/4/12 1:00 PM	NC36-99-0000	GORE HALL
<i>145787</i>	A	HOT WATER HEATER FLASKING	9/4/12 7:56 AM	NC36-99-0000	GORE HALL

Clicking the refresh button will refresh the query, and show any changes that were made to the work order.

4.1.14 Result Set Numbers

The result set numbers will show how many work orders are currently displayed, and how many total in the result set there are. In the example below, work orders 1-20 are currently displayed, and there are a total of 706 work orders in the result set total.



4.1.15 Download

On the far right of the work order list screen there is a download link. That allows the user to download the current result set to Excel for further investigation of the result set.

4.2 Work Order Screen



This tab is where the main information about the work order is located. This section is split into three columns.

4.2.1 General Information

This section contains most of the general information for a work order including location, charge, type and status of the work order.

4.2.1.1 Work Order Number

This is the unique number that identifies a work order. It is generated automatically by Maximo.

Work Order: * 
* Location: >> 
Request:
Location Owner:
Floor / Room ("0" if unnecessary):
Vicinity:
Parent WO: >>

4.2.1.2 Short Description

Create a headline in a NOUN-VERB (or VERB-NOUN if appropriate) format. Summarize the request or problem in as few words as possible. However, do not be too vague. The goal is to convey the reason for the work order quickly and accurately. Note the following tips and examples:

- Too Hot
- Too Cold
- Faucet Leak
- Drain Leak
- Toilet Clogged
- Floor Drain Clogged
- Light Out
- Circuit Tripped
- Door Won't Secure
- Door Alarm
- AHU-2 Down

Spelling is important. Incorrect spelling causes difficulties in subsequent searches.

Accuracy is important. Specify the correct piece of equipment and its number if applicable. For example, do not enter SINK LEAK as a substitute for FAUCET LEAK, BACKSPLASH NEEDS CAULK OR DRAIN LEAK. Likewise, instead of AHU, specify the number such as AHU-2.

Include keywords and equipment names. If you don't know the correct spelling, ask the requestor or search it online.

Use established codes and conventions for assets such as AHU-1 instead of AIR HANDLER 1.

Do not create abbreviations that aren't established conventions such as WIF for WALK -IN FREEZER.

For SWOs, begin the description with the fiscal year in a FY## format, such as FY18. Likewise, use the same rule for hierarchal work orders for major annual events such as Alumni Weekend (AW18).

4.2.1.3 Long Description

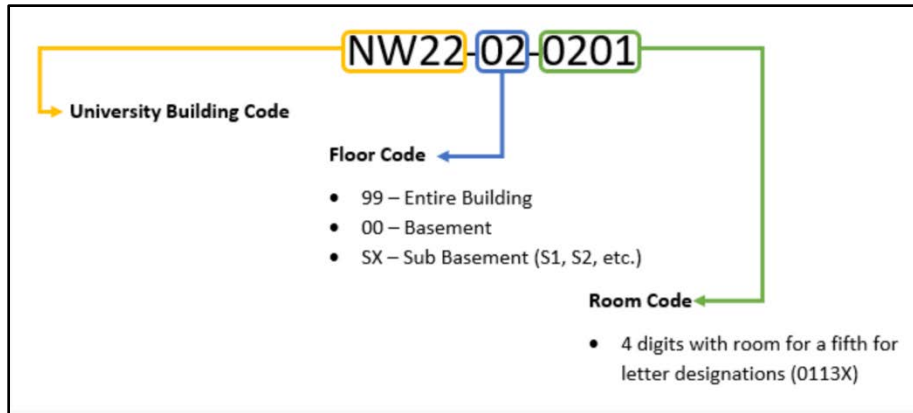
Include all pertinent information regarding the request in the long description. Customers often provide further details that can be of assistance to the responding mechanic. The best way to approach this section is to think of yourself as the mechanic and include any information you'd think would help minimize guessing and multiple trips to and from the work site. In addition, details regarding a request that was made as a fixit, voicemail, or boiler log should also be included in this section. In the long description, the creator of the work order should fixit, voicemail or boiler log, whichever best coincides with the request, followed by the date & time of when the request was made. Please see below for common examples of all long descriptions.

Common examples of long descriptions:

- Fixit – 07/27/2020 – 11:43am, Voicemail – 07/27/2020 – 6:59am, or Boiler log – 07/27/2020 – 7:30am
- (Too hot): No cool air from unit in small bedroom – Large bedroom was already serviced and works fine.
- (Too hot): Unit will make noise when turned on but will not actively cool.
- (Ceiling Leak): Near ceiling light fixture – steady drip.
- (Light Out): Light bulb out above mirror.
- (Investigate Possible FCU Leak): Spot has been noticed on carpet for past couple of days – Occupant has dried the spot, only for it to return each time.
- (Replace Copper Line – Domestic hot water heater #1. Replace copper line from boiler up to low water cut off. Heater is valve off because there is a leak. *As per state boiler inspector.
- (Inspect Light Switch): Light switch in bathroom does not stay in place when switched on, causing the lights to sometimes turn off.
- (Shower Clogged): Fixit 09/21/17, 12:05AM “The showers in the girls bathroom on the first floor flood when the water is turned on leaving an inch or two of dirty water to shower in on the ground.

4.2.1.4 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.)



For work affecting a building or an interior space, select the location of the work order by clicking the chevron next to Location, and then Select Value. Filter results by typing the building or location name under Description.

Choose the room-level Location Code (if applicable) by typing the room number under the Location filter field.

Choose the floor-level Location Code if there is no existing or known room number, or if the work takes place across multiple rooms on the same floor (ex., NW22-02-0000 for Trabant University Center Second Floor.)

Choose the building-level Location Code if the work takes place across multiple floors, or if the entire building is affected (ex., NW22-99-0000 for Trabant University Center.)

For exterior work on items attached to a building, select the building-level Location Code for exterior work on items attached to the building’s exterior, and use the Vicinity and Long Description fields to provide further details, including specifics of the issue’s location relative to other buildings and landmarks.

For exterior work on items not attached to a building, select an appropriate Newark Grounds location code. Identify the exact location in the Vicinity field, including any meaningful landmarks (ex., Location Code “NKGE-99-0000 Newark Grounds East Campus,” Vicinity “Brick pathway behind Perkins Student Center, nearest Harrington Turf.”) If the location cannot fit comfortably within the Vicinity field, summarize the location and utilize the space in the Long Description field.

4.2.1.5 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

4.2.1.6 Location Request

This is a University specific field and represents who owns the location. See [Appendix 1](#) for more details.

4.2.1.7 Location Owner

This is a depreciated field. See [Appendix 2](#) for more details.

4.2.1.8 Vicinity

The vicinity field helps narrow down the specific area of the location that the work order refers to, including room numbers nearest the location of the problem or identifying landmarks. Examples include the north door, second door on the far wall, etc.

4.2.1.9 Parent WO

If a work order is a child work order, its parent work order will be listed here.

4.2.1.10 Work Type

Identifies the work order's type. Some examples types are: preventive maintenance, corrective maintenance, service call, capital project, and event support. See [Appendix 3](#) for more details.

* Work Type:
FAS Type:
GL Account:
Compliance:

4.2.1.11 FAS Type

Facilities Appropriation Sheet (FAS). Indicates maintenance work that is beyond the scope Of day-to-day maintenance work. Typically valued \$100-\$100,000. Refer to SOP UD-FREAS-MO-ADMIN-001 for using this code. See also [Appendix 9](#).

4.2.1.12 GL Account

General ledger account code to which work order costs are charged. The GL (General Ledger) account consists of up to three components: purpose code (sometimes incorrectly referred to as speed type), account, and user defined, each separated by a period. Only the purpose code is entered in Maximo. Other components are indicated by ten questions marks (?????).

4.2.1.13 Compliance


Signifiers for various compliance protocols, such as local, state, and federal, and University guidelines. See [Appendix 4](#) for more details.

4.2.1.14 Attachments

Any supplemental information that can't be contained in the long description can be attached to the work order. This can include pictures, PDF documents, and web pages. Specific UD examples would involve pictures of broken equipment, floor plans, equipment details and job related documents.

The following file types can be attached to a work order.

- PDF – Portable Document Format
- XLS – Excel File Format (spreadsheet)
- CSV – Comma Separated Values
- TXT – Text file
- DOC – Word file format
- GIF – Graphics Interchange Format (picture)
- JPG – Picture file
- PPT – PowerPoint file format

[Attachments](#) 

Status:

* Status Date:

Inherit Status Changes?

Accepts Charges?

Is Task?

4.2.1.15 Status

Status of the work order. Examples include:

- In Progress
- Waiting on Material
- Waiting for Approval
- Completed
- Closed.

By default, all work orders begin in WAPPR (Waiting Approval) status. To select a Status, use the Change Status option on the left sidebar. Select the appropriate status on the drop-down tab. Alternately, the status may also be changed directly to APPR (Approved) using the green checkmark icon (Approve Work Order), or INPRG (In Progress) using the blue progress bar icon (Initiate Work Order).

Include a justification for the status in the Memo field (ex., “Dispatched 553” for an APPR status.)

Work orders may be changed directly to APPR or INRPG status using the green “Approve Work Order” check mark icon or “Initiate Work Order” progress bar icons, respectively. Also include a justification for the status in the Memo field.

See [Appendix 5](#) for more details on each status.

4.2.1.16 Status Date

The date when the current status was selected.

4.2.1.17 Inherit Status Changes

Specifies whether the work order’s status will change when its parent work order’s status changes. If the check box is selected the work order’s status will change when the parent work order’s status changes. If the check box is cleared (the default, except for PM and OC work types) the work order’s status will not change when the parent work order’s status changes.

4.2.1.18 Accepts Charges

Check box specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order.

4.2.1.19 Is Task

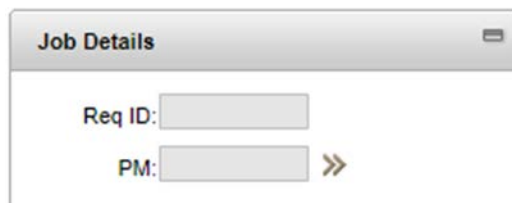
Specifies whether the work order is a task. If the check box is selected, the work order is a task. If the check box is cleared, the work order is not a task.

4.2.2 Job Details

The job details section show relevant information about any RFS or PM information that is attached to a work order.

4.2.2.1 Req. ID

Displays the Requisition ID number From the Request for Service (RFS) web form.



The screenshot shows a window titled "Job Details" with a close button in the top right corner. Inside the window, there are two input fields. The first is labeled "Req ID:" and is followed by a text input box. The second is labeled "PM:" and is followed by a text input box and a double right-pointing arrow icon (»).

4.2.2.2 PM

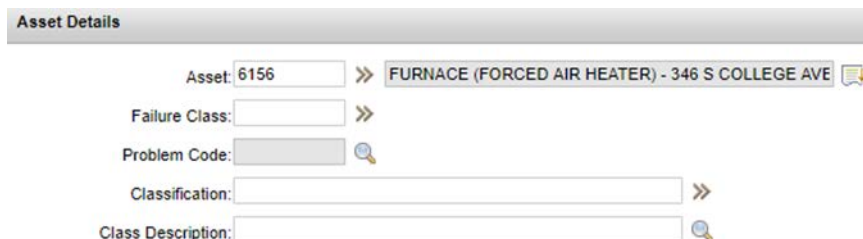
Reference to the PM number that spawned the work order.

4.2.2.3 Safety Plan

If a work order has an associated Safety Plan, it shows here. Currently, there is only one (i.e., General Safety Plan) that's comprised of a checklist of general safety considerations.

4.2.3 Asset

This section shows information about the asset, usually a piece of equipment, which is associated with the work order.



The screenshot shows a window titled "Asset Details" with a close button in the top right corner. Inside the window, there are five input fields. The first is labeled "Asset:" and contains the value "6156", followed by a double right-pointing arrow icon (») and a text box containing "FURNACE (FORCED AIR HEATER) - 346 S COLLEGE AVE" with a small icon to its right. The second is labeled "Failure Class:" followed by a text input box and a double right-pointing arrow icon (»). The third is labeled "Problem Code:" followed by a text input box and a magnifying glass icon. The fourth is labeled "Classification:" followed by a text input box and a double right-pointing arrow icon (»). The fifth is labeled "Class Description:" followed by a text input box and a magnifying glass icon.

4.2.3.1 Asset Number

Each asset has a unique identifier that is automatically assigned to the asset when it is created. That number is shown in the field.

4.2.3.2 Asset Description

The asset description is the short description of the asset selected. It usually contains the asset type, the building print designation, and the building it is in. (Example: (AHU 1 SUPPLY)-HARRINGTON COMMONS).

4.2.3.3 Failure Code

The failure code (see section 4.7) is what hard-coded to the asset if one is populated.

4.2.3.4 Problem Code

The problem code (see section 4.7) is what is hard-coded to the asset if one is populated.

4.2.3.5 Classification

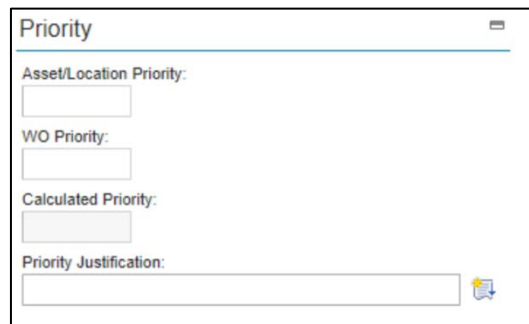
When you specify a classification for an object, you can related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application.

4.2.3.6 Class Description

Description of the classification specified for this record.

4.2.4 Priority

The Priority Section includes the asset, location, calculated priorities as well as a text box to justify a priority.



4.2.4.1 Asset/Location Priority

Identifies the priority level copied from the asset or location record and used to schedule the work order.

4.2.4.2 Work Priority

Identifies the importance of the work order on a 1-5 scale. The priority is determined by the best judgment of the dispatcher or other person creating the work order. Considerations include work requested, location, customer escalations, or similar factors. The highest priority (5) is or emergent or high-profile work request that are typically dispatched immediately. See [Appendix 6](#) for more details.

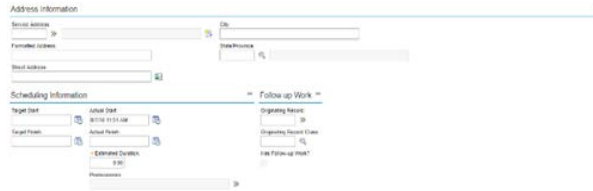
4.2.4.3 Calculated Priority

Is a product of adding the Asset/Location Priority and Work Order Priority together. This will be a value between 1-10 and represents the true priority of the work order for all scheduling.

4.2.4.4 Priority Justification

Describes why the work order received the priority it has been assigned. This is only currently used for Miss Utility STO work orders. The Long Description field is not currently used (though it can be accessed and edited by clicking the Long Description button).

4.2.5 Address Information

A screenshot of the Maximo software interface showing the 'Address Information' form. The form is divided into several sections: 'Service Address' with fields for 'Service Address' and 'Formatted Address'; 'Street Address' with a 'Street Address' field; 'Scheduling Information' with fields for 'Target Start', 'Actual Start', 'Target Finish', and 'Actual Finish'; and 'Follow up Work' with fields for 'Priority Name', 'Priority Description', and 'Has Follow-up Work?'. There are also buttons for 'Add Address', 'Edit Address', and 'Remove Address'.

4.2.5.1 Service Address

Each service address has an address code. Address codes are unique to an organization, and can be available to all locations at all sites in an organization.

Service address can contain general or detailed location information. For example, a service address for an asset might not be exact, especially in remote areas. However, the service address is typically precise enough so that it can direct a repair crew to that location. This information is useful for crews that work in remote locations, where a point of reference might be difficult to describe.

Here are some examples of service address details:

300 feet behind large red outbuilding

Mile marker 584

X coordinate 44.4545445 and Y coordinate -78.56456456

4.2.5.2 Formatted Address

The address is formatted according to the map provider's requirements and is updated when a location is found on the map tab. The formatted address can be used to search for addresses on the map tab.

4.2.5.3 Street Address

The street on which the job site is located on.

4.2.5.4 City

The city in which the work is being conducted.

4.2.5.5 State/Province

The state or province in which the work is being conducted.

4.2.6 Scheduling Information

The scheduling information section contains all the specific information for target start, target finish, and actual start and finish dates and times.

4.2.6.1 Target Start

Date the work order is targeted to begin. If the work order is generated from a PM or OC, the date is supplied by the PM or OC work order generation process.

4.2.6.2 Target Finish

Date the work order is targeted to be completed. Will be used at a later date at the University.

4.2.6.3 Actual Start

Date and time the actual work began. Filled in automatically when a work order changes status to INPRG (In Progress).

4.2.6.4 Actual Finish

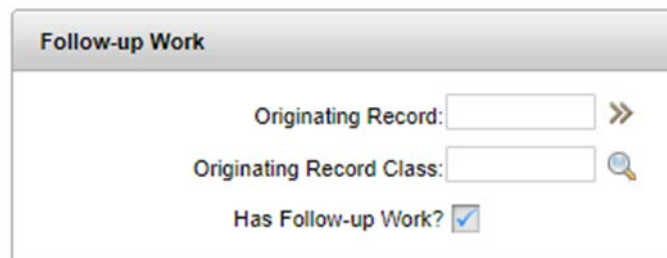
Date and time the actual work was completed. Filled in automatically when a work order changes status to COMP (Completed).

4.2.6.5 Total MHRS

Estimated remaining number of hours needed to complete the work.

4.2.7 Follow – Up Work

Follow – up work section that includes what the origination record is, what it is, and if the current work order has follow-up work.



Follow-up Work

Originating Record: >>

Originating Record Class: 🔍

Has Follow-up Work?

4.2.7.1 Originating Record

Identifies the source record number that was used to create this record. Used as a reference number.

4.2.7.2 Originating Record Class

Originating record's class, for example: change, release, incident, problem, or work order. Currently the University of Delaware only uses work orders.

4.2.7.3 Has Follow-Up Work

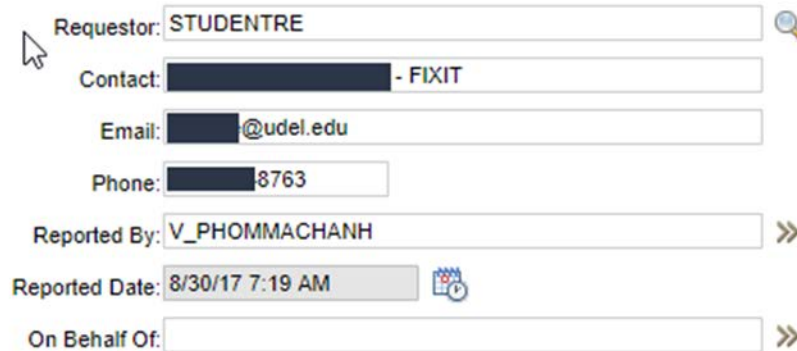
Specifies whether the work order has follow up work. If the check box is selected, there is follow up work. If the check box is cleared (the default), there is no follow up work.

4.2.8 Responsibility

This section is split up into three columns. The first column is related to whom the work order originated from. The second column contains who is assigned to this work order. The final column is the shop, or owner group that is assigned to the work.

4.2.8.1 Requestor

Is a broad categorization of the person who requested the work. See [Appendix 7](#) for more details.



The screenshot shows a Maximo form with the following fields and values:

- Requestor:** STUDENTRE
- Contact:** [REDACTED] - FIXIT
- Email:** [REDACTED]@udel.edu
- Phone:** [REDACTED] 8763
- Reported By:** V_PHOMMACHANH
- Reported Date:** 8/30/17 7:19 AM
- On Behalf Of:** [REDACTED]

4.2.8.2 Contact

Provide the name of the requestor if not already populated from the email address function. If the individual requested work from a Fixit, provide “FIXIT” at the end of the name. For a voicemail, provide “-VOICEMAIL” after the name. For a boiler log, provide “-BOILER LOG” after the name. If the request was made through a call into 1141, no additional information is needed in this field beyond their name.

4.2.8.3 Email

Provide an appropriate University of Delaware assigned e-mail address for the requestor. This e-mail will always end with “@udel.edu.” This information can be gathered by either asking the caller, retrieving it from a fixit request or searching for their name through the UD Directory. When an appropriate UD e-mail address is placed in this field, the name and phone number for the individual will populate for a staff or faculty member and just the name field for a student. If the requestor does not have a University e-mail address, provide “NA” in the field.

4.2.8.4 Phone

Provide an appropriate phone number for the requestor. If calling from a “302” area code, the area code is not required. If calling from out-of-state, ensure the area code is provided. If calling from a University extension it is appropriate to include only the extension (last four numbers after an 831 University number).

4.2.8.5 Reported by

Provides the user with the first initial and last name, or the Maximo user name of the individual who processed the work order.

4.2.8.6 Reported Date

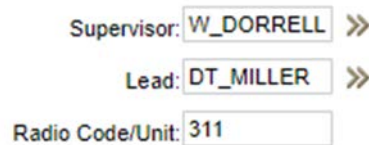
Provides the user with the date and time in which the work order was processed.

4.2.8.7 On Behalf Of

Identifies for whom this work order has been created. For example, if someone did not have access to a computer, another user could create the Work order on behalf of that person.

4.2.8.8 Supervisor

List the supervisor of the mechanic assigned the lead of the work order. This field is dependent upon the Lead field, and is populated based on that selection.



Supervisor: W_DORRELL >>
Lead: DT_MILLER >>
Radio Code/Unit: 311

4.2.8.9 Lead

The main mechanic assigned to perform the work.

Select the Lead by typing the technician's name or radio number in the Lead field and selecting the predictive text result. Alternately, click the chevron next to Lead and filter results using the Person or Name filters. Additionally, the Lead may also be changed by typing an appropriate radio unit number in the Radio Code field and pressing the TAB key.

Note that the work order will not accept or Radio Code that does not correspond to the selected Owner Group (ex., Radio Code 224 for the ER Owner Group will not be accepted when the EL Owner Group is selected).

4.2.8.10 Radio Code/Unit

The radio code of the mechanic assigned to do the work of the work order. Change the Radio Code by typing an appropriate radio unit number in the field and pressing the TAB key. Alternately, the Radio Code may be changed by typing the technician's name or radio number in the Lead field and selecting the predictive text result. Additionally, the Radio Code may be changed by clicking the chevron next to Lead and filtering results using the Person or Name filters.

Note that the work order will not accept a Radio Code or Lead that does not correspond to the selected Owner Group (ex., Radio Code 224 for the ER Owner Group will not be accepted when the EL Owner Group is selected.)

4.2.8.11 Owner Group

The owner group, or shop that is currently responsible for the work order.



Owner Group: HSM

Select an Owner Group with the Select Owner icon.

Filter results by using the Owner Group's known abbreviation under the Person Group filter, or the Owner Group's name under the Description filter (ex., EL under Person Group, or Electrical under Description for the Electric Shop.)

The work order is automatically saved whenever an Owner Group is selected or changed.

See [Appendix 8](#) for more details.

4.3 Plans Tab

The Plans Tab is where all the child work orders, tasks, and requirements for labor and material, are located.

4.3.1 Site

The site indicates what physical location the work order is located. At the University of Delaware, we only have one site (UDEL).

4.3.2 Children of Work Order XXXXX

This section lists all the children work orders of the current work order, which is referred to as the parent work order.

4.3.2.1 List Section

This section lists all the associated child work orders for the current parent work order.

Sequence	Record	Record Class	Summary	Location	Asset	Status
	1376145	WORKORDER	FIRE RESPONSE 06/04/20 - LK SUPPORT	STC02-99-0000		COMP
	1376147	WORKORDER	CALL-IN - FIRE RESPONSE 06/04/20 - ER 5	STC02-99-0000		COMP
	1376221	WORKORDER	FIRE RESPONSE - PERFORM ELECTRICA	STC02-99-0000		COMP
	1389765	WORKORDER	CHECK GENERATOR FOR PROPER OPER	STC02-99-0000		APPR
	1376148	WORKORDER	FIRE RESPONSE 06/04/20 - PL SUPPORT	STC02-99-0000		COMP

4.3.2.2 Child Information

This section displays information about the specific child work order selected.

Child Information

<p>Sequence: <input type="text" value="1376145"/></p> <p>Record Class: <input type="text" value="WORKORDER"/></p> <p>Summary: <input type="text" value="FIRE RESPONSE 06/04/20 - LK SUPPORT"/></p> <p>Location: <input type="text" value="STC02-99-0000"/></p> <p>Asset: <input type="text" value=""/></p> <p>Status: <input type="text" value="COMP"/></p>	<p>Record Class: <input type="text" value="WORKORDER"/></p> <p>Summary: <input type="text" value="CALL-IN - FIRE RESPONSE 06/04/20 - ER 5"/></p> <p>Location: <input type="text" value="STC02-99-0000"/></p> <p>Asset: <input type="text" value=""/></p> <p>Status: <input type="text" value="COMP"/></p>
<p>Record Class: <input type="text" value="WORKORDER"/></p> <p>Summary: <input type="text" value="FIRE RESPONSE - PERFORM ELECTRICA"/></p> <p>Location: <input type="text" value="STC02-99-0000"/></p> <p>Asset: <input type="text" value=""/></p> <p>Status: <input type="text" value="COMP"/></p>	<p>Record Class: <input type="text" value="WORKORDER"/></p> <p>Summary: <input type="text" value="CHECK GENERATOR FOR PROPER OPER"/></p> <p>Location: <input type="text" value="STC02-99-0000"/></p> <p>Asset: <input type="text" value=""/></p> <p>Status: <input type="text" value="APPR"/></p>
<p>Record Class: <input type="text" value="WORKORDER"/></p> <p>Summary: <input type="text" value="FIRE RESPONSE 06/04/20 - PL SUPPORT"/></p> <p>Location: <input type="text" value="STC02-99-0000"/></p> <p>Asset: <input type="text" value=""/></p> <p>Status: <input type="text" value="COMP"/></p>	<p>Record Class: <input type="text" value="WORKORDER"/></p> <p>Summary: <input type="text" value="FIRE RESPONSE 06/04/20 - PL SUPPORT"/></p> <p>Location: <input type="text" value="STC02-99-0000"/></p> <p>Asset: <input type="text" value=""/></p> <p>Status: <input type="text" value="COMP"/></p>

4.3.2.2.1 [Sequence](#)

Indicates the sequence in which to execute the child work orders in a work order hierarchy.

4.3.2.2.2 [Record](#)

Identifies the child work order number.

4.3.2.2.3 [Record Class](#)

The class of the child work order record.

4.3.2.2.4 [Location](#)

Identifies the child work order's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default there.

4.3.2.2.5 [Asset](#)

Identifies the asset.

4.3.2.2.6 [Job Plan](#)

Identifies the child work order's job plan.

4.3.2.2.7 [Route](#)

Identifies the child work order's route.

4.3.2.2.8 [Route Stop](#)

Identifies which stop on the work order route it is.

4.3.2.2.9 [Status](#)

Status of the child work order.

4.3.2.2.10 [GL Account](#)

General ledger account code to which child work order costs are charged. The GL account consists of up to three components: speed type, account, and user defined, each separated by a period. If the work order was generated from a PM, Maximo copies the GL account from the PM. (See section 4.2.1.12 for more information)

4.3.2.2.11 [Priority](#)

Identifies the importance of the child work order. See [Appendix 6](#) for more details.

4.3.2.2.12 [Inherit Status Changes](#)

Specifies whether a child work order (CWO) status will change when its parent work order's status changes. If the check box is selected the child work order's status will change when the parent work order's status changes. If the check box is cleared (the default), the child work order status will not change when the parent work order's status changes.

4.3.2.2.13 [Accepts Charges](#)

Specifies whether or not a work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does

not accept charges. If the user attempts to input labor or material charges, Maximo will display an error box.

4.3.2.3 Scheduling Information

All of the scheduling information for each child work order is located in this section.

4.3.2.3.1 Target Start

Date the child work order is targeted to begin. If the child work order is generated from a PM, the date is supplied by the PM work order generation process.

4.3.2.3.2 Target Finish

Date the child work order is targeted to be completed.

4.3.2.3.3 Scheduled Start

Date and time the child work order is scheduled to begin.

4.3.2.3.4 Scheduled Finish

Date and time the child work order is scheduled to complete.

4.3.2.3.5 Start No Earlier Than

The earlier date at which the child work order should start. Scheduled dates should be after this date.

4.3.2.3.6 Finish No Later Than

The date that the child work order should be completed by. Scheduled dates should be before this date.

4.3.2.3.7 Include Tasks in Schedule

Indicates that this child work order's tasks will be included in the schedule view.

4.3.2.3.8 Actual Start

Date and time the work was actually started.

4.3.2.3.9 Actual Finish

Date and time the work was actually completed.

4.3.2.3.10 Estimated Duration

Estimated time needed to complete the work.

4.3.2.3.11 Predecessors

A non-persistent field to display the work orders predecessor (a work order that has been followed by another) work orders.

4.3.2.4 Select Assets Button

This button allows the assigning of one or more assets to the selected child work order.

4.3.2.5 Select Location Button

This button allows the assigning of the location of the selected child work order.

4.3.2.6 [Select Work Order Button](#)

Allow current work orders to be selected as a child of the current work order.

4.3.2.7 [New Row Button](#)

Creates a new line item under the Children Work Orders section of the parent work order.

4.3.3 [Tasks for Work Order XXXXX](#)

This section lists all the appropriate tasks associated with the work order. Usually tied to a Job plan.

4.3.3.1 [List Section](#)

This section lists the summary of each task for the given work order.

Sequence	Task	Summary	Estimated Duration	Status	Owner	Owner Group
10	Change Belts		0:00	APPR		HVAC
20	Check Sheaves for Wear		0:00	APPR		HVAC
30	Check Sheave Alignment		0:00	APPR		HVAC
40	Grease Bearings		0:00	APPR		HVAC
50	Check Hold-down Bolt Torque		0:00	APPR		HVAC
60	Check and Confirm Back Draft Damper Oper		0:00	APPR		HVAC

4.3.3.2 [Task Information](#)

This contains detailed information about each individual task.

Task Information

Task: 10 Change Belts

Sequence: 10

Status: APPR

Classification: []

Classification Description: []

Inspection Form: []

Inspection Result: []

Under Flow Control? []

Flow Action: []

Suspend Flow Control? []

Flow Action Assist? []

Launch Entry Name: []

Interruptible? []

Interruptible shift: []

Attachments: []

Inherit Status Changes? [x]

Accepts Charges? []

Owner: []

Owner Group: HVAC

Crew Work Group: []

Route: []

Route Stop: []

4.3.3.2.1 [Task](#)

Identifies the task number.

4.3.3.2.2 [Sequence](#)

Indicates the sequence in which to execute the work orders in a hierarchy.

4.3.3.2.3 [Status](#)

Status of the task work order.

4.3.3.3 [Work Reference Information](#)

Shows information about the work order that the task is related to.

The screenshot shows the 'Work Reference Information' section of a Maximo interface. It contains several input fields and dropdown menus. On the left, there are fields for 'Reference WO' (value: 1265025), 'Location' (value: NE67-01-0153), and 'Asset' (value: 3292). In the center, there is a dropdown for 'Service Group' and another for 'Service'. On the right, there are fields for 'Observation', 'Inspector', 'Measurement Point', 'Measurement Value', and 'Measurement Date'. Each field has a small icon to its right, likely for search or refresh functionality.

4.3.3.3.1 Reference WO

Identifies the work order number for the task.

4.3.3.3.2 Location

Identifies the work order task's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default here.

4.3.3.3.3 Asset

Identifies the asset tied to the task work order.

4.3.3.4 Scheduling Information

This section details the scheduling information for the individual task work order.

The screenshot shows the 'Scheduling Information' section of a Maximo interface. It contains several input fields and dropdown menus. On the left, there are fields for 'Target Start' (value: 4/1/20 12:00 AM), 'Target Finish' (value: 4/1/20 12:00 AM), 'Start No Earlier Than', and 'Finish No Later Than'. On the right, there are fields for 'Actual Start', 'Actual Finish', 'Estimated Duration' (value: 0:00), and 'Predecessors'. Each field has a small icon to its right, likely for search or refresh functionality.

4.3.3.4.1 Target Start

Date the task work order is targeted to begin.

4.3.3.4.2 Target Finish

Date the task work order is targeted to be complete.

4.3.3.4.3 Start No Earlier Than

The earliest date at which the task work order should start. Scheduled dates should be after this date.

4.3.3.4.4 Finish No Later Than

The date that the task work order should be completed by. Scheduled dates should be before this date.

4.3.3.4.5 Actual Start

Date and time the task work order was actually started.

4.3.3.4.6 Actual Finish

Date and time the task work order was actually completed.

4.3.3.4.7 Estimated Duration

Estimated time needed to complete the task work order.

4.3.3.4.8 Predecessors

Anon-persistent field to display the task work order's predecessor work orders.

4.3.3.5 New Row Button

Allows the ability to add additional tasks to the work order.

4.3.4 Labor

The labor section shows what labor is needed to complete the work order. This includes the Craft, Skill level, Quantities of each, and how many hours are needed.

4.3.4.1 List Section

This is a summary of the information listed in the labor section.

Task	Crew Type	Craft	Skill Level	Vendor	Quantity	Labor	Crew	Regular Hours	Rate	Line Cost
10		ER			10			1.00	0.00	0.00
10		PL			11			1.00	0.00	0.00
10		IN			2			1.00	0.00	0.00
10		EL			14			1.00	0.00	0.00
10		RF			4			1.00	0.00	0.00
10		CA			7			1.00	0.00	0.00

4.3.4.2 Detail

This shows more information than the summary section for the labor needed to complete the work order.

Task:	Quantity:	Regular Hours:
10	10	1:00
Crew Work Group:	Crew:	Rate:
		0.00
Crew Type:	Labor:	Line Cost:
		0.00
Craft:	Outside?	Rate Changed?
ER	<input type="checkbox"/>	<input type="checkbox"/>

4.3.4.2.1 Task

Identifies the task for the planned craft or labor.

4.3.4.2.2 Craft

Identifies the craft. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application.

4.3.4.2.3 Quantity

The required quantity of individuals.

4.3.4.2.4 Labor

Identifies the labor planned for the work order task.

4.3.4.2.5 Outside

Identifies if the labor is an outside resource as in a contractor.

4.3.4.2.6 Regular Hours

Number of labor hours required to complete the work.

4.3.4.2.7 Rate

Hourly pay rate for the labor or craft. Maximo copies this data from the Labor table. If you modify this field, Maximo recalculates the Line Cost field on the Labor subtab, and the Current Estimate Labor Cost in the View Costs dialog box. You can edit this field if the work order's status allows work plan labor edits. Work Order editing rules are set up in the Organizations application.

4.3.4.2.8 Line Cost

A calculation of the regular hours times the rate.

4.3.4.2.9 Rate Changes

Indicates whether a user has overwritten the value in the Rate field. If the check box is cleared (the default), and the labor's rate or the labor contract has changed since the labor was planned, Maximo overwrite the Rate field on approval. If the check box is selected, Maximo does not overwrite the Rate field on approval.

4.3.4.3 Select Crew Type Button

Allows the selection of the appropriate crew to work on the selected work order. The University of Delaware does not currently use Crews.

4.3.4.4 Select Craft Button

Allows the quick selection of craft when creating a planned labor row.

4.3.4.5 New Row Button

This is how a user creates a row in the Planned Labor section.

4.3.5 Materials

The process of adding planned materials to a work order. Not currently used by the University of Delaware.

4.4 Assignments Tab

This tab shows the mechanic or mechanics that are assigned to the work order based on the requirements and planned labor.

4.4.1 Scheduled Start

Date and time the work is scheduled to begin.

4.4.2 Scheduled Finish

Date and time the work is scheduled to be completed.

4.4.3 Assignments

Shows any assignments for the work order.

4.4.3.1 List Section

Summary information about any mechanics that are scheduled for the work order.

4.4.3.2 Details

Details section of the assignment information.

4.4.3.2.1 Task

Identifies the task for assignment.

4.4.3.2.2 Labor

Person or mechanic assigned to this individual assignment.

4.4.3.2.3 Craft

The Craft needed to meet this selected requirement.

4.4.3.2.4 Skill Level

The appropriate skill level assigned to the craft.

4.4.3.2.5 Vendor

The Vendor associated with this assigned labor.

4.4.3.2.6 Contract

The Contract number for an outside rate.

4.4.3.2.7 Scheduled Start

The scheduled start date and time for the current assignment.

4.4.3.2.8 Hours

The length of time that the resource is required.

4.4.3.2.9 Status

The Status of the requirement

4.4.3.3 Available Labor Button

Pressing this button brings up the Available Labor window that shows any mechanics that have the required craft/skill level, and hourly availability for the selected assignable resource.

Labor	Name	Craft	Skill Level	Work Location	Shift	Start Time	Available Hours	Assigned?
A_KNOX	KNOX, ALAN J.	RF		NKSH-99-STR	01		0:00	
A_MCDANIEL	MCDANIEL, ANGELA	HV-LRF		NKSH-99-HV			0:00	
C_REYNOLDS	REYNOLDS, CARROLL E.	RF		NKSH-99-STR	01		0:00	
D_COX	COX, DONALD S.	RF		NKSH-99-STR			0:00	
D_WERTS	WERTS, DAVID	HV-LRF		NKSH-99-HV	01		0:00	
J_BARLOW	BARLOW, JOHN	RF		NKSH-99-STR			0:00	
J_DOUGLAS	DOUGLAS, JEFFREY	RF		NKSH-99-STR	01		0:00	
J_KWIATKOWSKI	KWIATKOWSKI, JAMES W.	HV-LRF		NKSH-99-HV			0:00	

4.4.3.4 Complete Assignment Button

This button will change the status of the currently selected assignment to COMPLETE.

4.4.3.5 New Row Button

This will allow a new row to be added to the assignments.

4.5 Actuals Tab

This tab contains information about the individual charges for the work order. Labor and material charges, in the form of credit card charges are included.

4.5.1 Children of WO XXXXX

This section lists all the children work orders of the current work order, which is referred to as the parent work order.

4.5.2 Labor

This section contains a listing of all the labor transactions for the current work order.

The screenshot shows the 'Labor' entry form in Maximo. At the top, there are tabs for 'Labor' and 'Materials'. Below that, a table lists labor transactions. The first row is selected, showing details for work order 736479, task EL, start date 4/4/18, end date 4/7/18, craft EL, labor REG, 2.00 hours, line cost 62.04, GL date 4/11/18 4:50 PM, and GL description L-EL REMOVE PRONG FROM ELECTR. Below the table, there are sections for 'Labor' details (Craft, Start Date, End Date, Type), 'Outside Labor' (Outside?), 'Premium Pay' (Premium Pay Code, Premium Pay Hours, Premium Rate Type), and 'Charge Information' (GL Debit Account, GL Credit Account, Location, Asset, GL Description, GL Date, Entered By).

4.5.2.1 List Section

A summary of the labor transactions for the current work order including details of the mechanic who performed the work, the start date, the end date, the funding account used & other pertinent information.

The screenshot shows the 'Labor' list section in Maximo. It displays a table with columns for Work Order, Task, Start Date, End Date, Craft, Labor, Type, Rep. Hrs, Line Cost, GL Date, GL Description, GL Debit Account, GL Credit Account, and Approv??. The first row is selected, showing details for work order 1383153, task HV-CM, start date 6/23/20, end date 6/24/20 6:46 AM, labor Maximo Labor, 0.30 hours, line cost 15.82, and GL date 6/24/20 6:46 AM.

4.5.2.2 Labor

Section that shows the task, labor code, labor name, and if the labor transaction was approved or not.

The screenshot shows the 'Labor' entry form in Maximo, focusing on the 'Task', 'Labor', and 'Approved?' fields. The 'Task' field is empty, the 'Labor' field contains a labor code and name, and the 'Approved?' field has a checked checkbox.

4.5.2.2.1 Task

Identifies the task for which you are reporting labor. This field is not currently used by the University.

4.5.2.2.2 Labor

Identifies the University technician and/or shop performing the work.

4.5.2.2.3 Approved

Specifies whether the labor transaction has been approved and a service receipt can be written. If the check box is selected, the transaction has been approved. If the check box is cleared, the transaction has not been approved. You can edit labor transactions until the work order is closed or cancelled.

4.5.2.3 Details

Includes the Craft, Crew, Start Date, Entered Date, Regular Hours amount, End Date, Line Cost, Time Type, and current Timer Status of the selected labor transaction.

Details			
Craft:	Start Date:	End Date:	Type:
HV-CM >>	6/23/20		REG
Crew:	Entered Date:	Line Cost:	Timer Status:
>>	6/23/20 2:10 PM	15.82	
	Regular Hours:		
	0:30		

4.5.2.3.1 Craft

Identifies the University shop used. This field is read-only, if the work field contains a craft. If you edit this field, the Rate and Premium Pay Code fields are updated automatically.

4.5.2.3.2 Start Date

Date on which the reported work began.

4.5.2.3.3 Entered Date

Date labor was reported on the labor transaction.

4.5.2.3.4 Regular Hours

Number of regular hours (not overtime, holiday, weekend, etc.) worked.

4.5.2.3.5 End Date

Date on which the University technician finished the work. If you have entered a Start Date, Start Time, and Finish Time, Maximo calculates a value for the Finish Date field using this formula: (start date) + (finish time – start time). The work order must be approved before you can insert a value. You can modify the field until you save the record. Maximo then updates the Line Cost field.

4.5.2.3.6 Line Cost

Extended or lump sum cost of labor transaction.

4.5.2.3.7 Type

The type of time being entered (work, travel, vacation, etc.). If you use WORK, TRAV, or WMATL as the type(WMATL is the only Type used at UDEL), you must enter a work order, GL account, asset, or location.

4.5.2.3.8 Timer Status*

Indicates whether a user created the labor transaction using the timer on the Maximo toolbar. If the field is blank, the timer was not used. If the field has a value, the timer was used to create this labor transaction. ****This functionality is not currently used.***

4.5.2.4 Outside Labor

This section is for indicating whether the labor being reported was done by an outside source or not. The University of Delaware does not currently use this function.

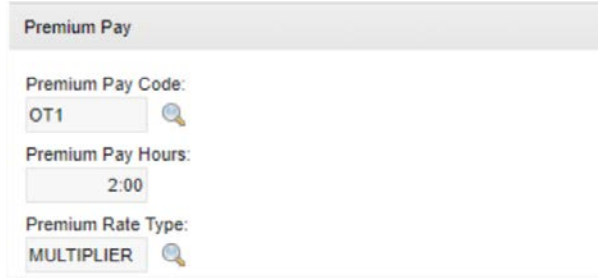
Outside Labor
Outside?
<input type="checkbox"/>

4.5.2.4.1 [Outside](#)

Specifies whether the work was performed by an outside contractor or by a University technician. If the check box is selected, the work was performed by a contractor. If the check box is cleared, the work was performed by a University technician. Maximo selects or clears the check box based on the value in the Labor field.

4.5.2.5 [Premium Pay](#)

If a labor transaction is not done during normal working hours, or outside the scope of normal working shift, it is considered Premium Pay Time.



4.5.2.5.1 [Premium Pay Code](#)

Identifies the premium pay code for this labor transaction, for example, holiday hours, Sunday hours, greater than 40 hours per week, greater than eight hours per shift.

4.5.2.5.2 [Premium Pay Hours](#)

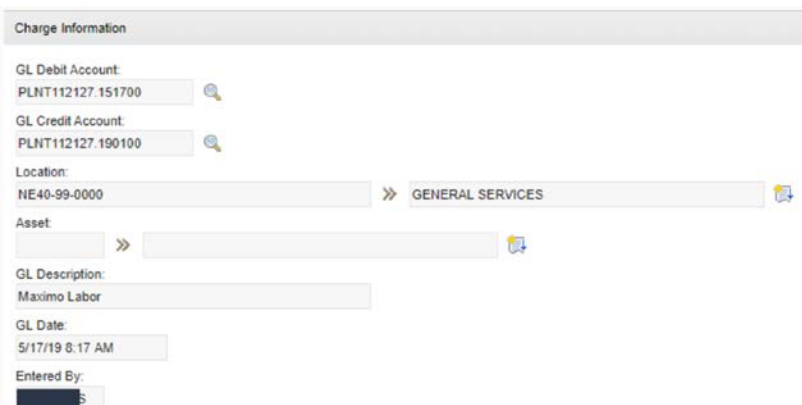
Number of hours for which the labor will be paid the premium rate.

4.5.2.5.3 [Premium Rate Pay](#)

Describes the type of premium rate, for example, hourly, incremental, or multiplier.

4.5.2.6 [Charge Information](#)

This section includes the Debit and Credit accounting information for the labor line as well as the location, asset, GL Description memo, GL date and time, and who entered in the labor line into Maximo.



4.5.2.6.1 [GL Debit Account](#)

General ledger account to charge for the labor transaction.

4.5.2.6.2 [GL Credit Account](#)

General ledger account to which the cost of the labor is to be credited.

4.5.2.6.3 [Location](#)

Identifies the location to which labor costs are charged.

4.5.2.6.4 [Asset](#)

Identifies the asset to which labor costs are charged.

4.5.2.6.5 [GL Description](#)

Describes any notes or comments about the performed work.

4.5.2.6.6 [GL Date](#)

The date and time the transaction was recorded in the General Ledger system.

4.5.2.6.7 [Entered By](#)

University technician or employee who entered in the labor transaction into Maximo.

4.5.3 Materials

This section contains a listing of all the material transaction for the current work order.

The screenshot displays the 'Materials' tab within a Maximo application window. At the top, there is a navigation bar with 'Labor' and 'Materials' tabs. Below this is a table header with columns: Work Order, Task, Transaction Date, Description, Quantity, Unit Cost, Line Cost, Entered By, GL Date, GL Description, GL Debit Account, GL Credit Account, and GL Entry Held?. The table contains one row with the following data: Work Order 827879, Task WP 14.33-CU FT WRT314TFDW, Transaction Date 8/2/18 12:00 AM, Description WP 14.33-CU FT WRT314TFDW, Quantity 6.000, Unit Cost 395.10, Line Cost 2.323.19, Entered By UDMATLIFAC, GL Date 9/14/18 11:52 AM, GL Description LOWES GREENWOOD GRANT 18434.82, GL Debit Account PLNT112118, and GL Credit Account FACL212113.

Below the table is a 'Details' section with two columns of fields. The left column includes: Task, Item (WP 14.33-CU FT WRT314TFDW), GL Description (LOWES 18434.82), Line Type (Material), Part Number (623777), Storeroom, Site (UDEL), Quantity (6.000), Unit Cost (395.10), Line Cost (2.323.19), and Bin. The right column includes: Lot, Expiration Date, Lot Type, Stock Category, Entered By (UDMATLIFAC), Actual Date (9/14/18 11:52 AM), and Transaction Date (8/2/18 12:00 AM).

The 'Charge Information' section is located below the details. It includes fields for Requisition, Requisition Line, Location (CHRISTIANA COMMONS), Asset, and Rotating Asset. On the right side of this section, there are fields for GL Debit Account (PLNT112118.140900), GL Credit Account (FACL212113.141500), Transaction Type (ISSUE), GL Entry Held?, Integrated Supplier?, Department (S841), and Issued To.

At the bottom right of the form, there are four buttons: 'Select Materials', 'Select Reserved Items', 'Select Asset Spare Parts', and 'New Row'.

4.5.3.1 List Section

A summary or the material transactions for the current work order.

Materials Filter 1 - 4 of 4

Work Order	Task	Transaction Date	Description	Quantity	Unit Cost	Line Cost	Entered By	GL Date	GL Description	GL Debit Account	GL Credit Account	GL Entry Held?
1000017		10/11/19 12:00 P	Cable, 1/8 In,L100Fl,WLL420Lb,1x7,SS	2.000	95.15	190.30	UDMATLIFAC	11/13/19 10:35 P	Grainger D ISAKOFF 345.78	PLNT112127	FACL212113	
1000017		10/11/19 12:00 /	Wire Rope Clip,U-Bolt,1/8 In,304 SS	32.000	4.36	139.52	UDMATLIFAC	11/13/19 10:35 /	Grainger D ISAKOFF 345.78	PLNT112127	FACL212113	
1000017		10/11/19 12:00 /	Wire Rope Thimble,1/8 In,SS,PK25	1.000	15.96	15.96	UDMATLIFAC	11/13/19 10:35 /	Grainger D ISAKOFF 345.78	PLNT112127	FACL212113	
1000017		11/7/19 12:00 AI	Diagonal Cutting Plier,8" L	2.000	36.68	73.36	UDMATLIFAC	12/5/19 10:57 AI	Grainger D ISAKOFF 73.36	PLNT112127	FACL212113	

Select Materials Select Reserved Items Select Asset Spare Parts New Row

4.5.3.2 Details

Contains information such as Task, Item and Description, Quantity, Unit Price, and Entered by Date.

Details

<p>Task: <input type="text"/></p> <p>Item: <input type="text" value="Cable, 1/8 In,L100Fl,WLL420Lb,1x7,SS"/></p> <p>GL Description: <input type="text" value="Grainger D ISAKOFF 345.78"/></p> <p>Line Type: <input type="text" value="Material"/></p> <p>Part Number: <input type="text" value="2TAJ8"/></p> <p>Storeroom: <input type="text"/></p> <p>Site: <input type="text" value="UDEL"/></p> <p>Quantity: <input type="text" value="2.000"/></p> <p>Unit Cost: <input type="text" value="95.15"/></p> <p>Line Cost: <input type="text" value="190.30"/></p> <p>Bin: <input type="text"/></p>	<p>Lot: <input type="text"/></p> <p>Expiration Date: <input type="text"/></p> <p>Lot Type: <input type="text"/></p> <p>Stock Category: <input type="text"/></p> <p>Entered By: <input type="text" value="UDMATLIFAC"/></p> <p>Actual Date: <input type="text" value="11/13/19 10:35 AM"/></p> <p>Transaction Date: <input type="text" value="10/11/19 12:00 AM"/></p>
---	---

4.5.3.2.1 [Task](#)

Identifies the task for which the item or material was used.

4.5.3.2.2 [Item](#)

Item that you want to issue from this storeroom or that you used on a work order.

4.5.3.2.3 [Item Description](#)

Describes the item. To enter or view more information, click the Long Description button.

4.5.3.2.4 [GL Description*](#)

Describes any notes or comments about the item bought. ****UDEL custom field***

4.5.3.2.5 [Line Type](#)

Identifies the line type, for example, ITEM, TOOL, or MATERIAL.

4.5.3.2.6 [Part Number](#)

The designated number assigned to the material used.

4.5.3.2.7 [Storeroom](#)

The location of the storeroom. Not currently used by the University of Delaware.

4.5.3.2.8 [Site](#)

Identification of the work site. For our purposes, this will be "UDEL" for the University of Delaware.

4.5.3.2.9 [Quantity](#)

Number of the item you want to issue or have issued from this storeroom.

4.5.3.2.10 [Unit Cost](#)

Cost of the item on this transaction.

4.5.3.2.11 [Line Cost](#)

Line cost of the transaction, calculated as Unit Cost multiplied by the Quantity of the item.

4.5.3.2.12 [Bin](#)

Bin number in this storeroom from which the item is issued. Not currently used by the University.

4.5.3.2.13 [Lot](#)

Lot number in this storeroom from which the item is issued. Not currently used by the University.

4.5.3.2.14 [Expiration Date](#)

Use-by date for the item being issued or transferred, if in a lot. Click the Select Date button to use the calendar control.

4.5.3.2.15 [Lot Type](#)

Specifies whether the item is tracked by lot (LOT) or not (NOLOT). LOT is used for an item that is looted, typically has an expiration date, and is able to be assigned lot number upon receipt. NOLOT means that the item does not need to be tracked by lots. Click the Select Value button to choose a lot type.

4.5.3.2.16 [Stock Category](#)

Indicates whether the item is a stocked item (STK), or a non-stocked item (NS). If the value is SP, then the item was identified as a special order item by the system as part of the purchasing process.

4.5.3.2.17 Entered by

Maximo user name of the person initiating this transaction.

4.5.3.2.18 Actual Date

Date and time of the issue transaction, which may be different than the time the transaction is recorded in Maximo. Maximo populates the current date and time by default. You can modify the value in this field. Click the Select Date and Time button to use the calendar control.

4.5.3.2.19 Transaction Date

Date and time the transaction was entered in Maximo. This field is read only.

4.5.3.3 Charge Information

Includes Requisition information as well as Location, Asset, and GL account information.

4.5.3.3.1 Requisition

Requisition number associated with this transaction. Click the Select Value button to choose a requisition.

4.5.3.3.2 Requisition Line

Line number on the requisition for the item being issued.

4.5.3.3.3 Location

Location to charge for this transaction. This will autofill with the location of the University building already assigned to the work order.

4.5.3.3.4 Asset

Asset number associated with this transaction.

4.5.3.3.5 Rotating Asset

Identifies the rotating asset number associated with the item being issued.

4.5.3.3.6 GL Debit Account

GL account being debited when the item is issued. Click the Select Value button to choose a GL account.

4.5.3.3.7 GL Credit Account

GL account being credited when the item is issued. Click the Select value button to choose a GL account.

4.5.3.3.8 Transaction Type

Type of transaction, either ISSUE or RETURN. Click the Select Value button to choose a transaction type.

4.5.3.3.9 GL Entry Held

Specifies whether the item being issued is a consignment good. If the check box is selected, the item belongs to a contractor (or vendor), but it is stored on-site, and it is an item for which you expect to be charged for its use. If the check box is cleared (the default), the item is not owned by an outside party.

4.5.3.3.10 Integrated Supplier

Check box that indicates if the material transaction is part of integrated Supplier such as Grainger, Ferguson, etc.

4.5.3.3.11 Department

The department being charged. This is a University of Delaware specific field, but is currently not being used.

4.5.3.3.12 Issued To

Person to whom the item, tool, or material is issued. Click the Detail Menu button to choose a person or go to the People application.

4.6 Log Tab

The Log Tab shows all communication for the current work order including Work Logs and other communications.

4.6.1 Work Log

Primary means of communication on a work order after its creation. Used by mechanics, managers, accounting, and other groups to convey information relevant to the flow of the work order.

The screenshot displays the Maximo Work Log interface. At the top, there are navigation tabs: List View, Work Order, Plans, Assignments, Actuals, Safety Plan, Log (selected), Failure Reporting, and Service Address. Below the tabs, the Work Order details are shown: Work Order: 827079, ORDER NEW FRIDGES FOR STOCK, Location: NN38-99-0000, CHRISTIANA COMMONS. Other fields include Owner Group: HSM, Status: COMP, Supervisor: W_DORRELL, Actual Start: 8/1/18 10:45 AM, Lead: G_GREENWC, Actual Finish: 8/22/18 9:28 AM, and Estimated Duration: 0:00.

The Work Log section shows a table with the following data:

Record	Class	Created By	Date	Type	Summary	Viewable?	Energy Savings?
827079	WORKORDE	[Redacted]	8/21/18 2:51 PM	WORK		<input type="checkbox"/>	<input type="checkbox"/>
827079	WORKORDE	[Redacted]	8/1/18 2:57 PM	WORK		<input type="checkbox"/>	<input type="checkbox"/>

The Details view for the selected record (827079) shows the following information:

- Record: 827079
- Class: WORKORDEF
- Created By: [Redacted]
- Date: 8/1/18 2:57 PM
- Type: WORK
- Viewable?:
- Energy Savings?:

The Summary field contains the text: "Ordered 6 whirlpool fridges from Lowe's model#wrt314fdw00. Ser#vs71645064".

4.6.1.1 [Work Logs](#)

Section for all work logs for a work order.

4.6.1.1.1 [List Section](#)

A listing of all the work logs created for the current work order.

4.6.1.2 [Details](#)

Shows more information about a selected work log.

4.6.1.2.1 [Record](#)

Identifies the record for the work log entry.

4.6.1.2.2 [Class](#)

Class of the record for the work log entry.

4.6.1.2.3 [Created by](#)

Person that created the work log entry.

4.6.1.2.4 [Date](#)

Date on which the work log entry was created.

4.6.1.2.5 [Type](#)

Type of work log entry. Enter a value or click the Select Value button.

4.6.1.2.6 [Viewable](#)

Specifies whether a self-service user can view this work log entry. If the Viewable? check box is selected, or there is a Y in the Viewable? Field, the user can view this entry. If the "Viewable"? check box is cleared, or there is an N in the Viewable? Field, the user cannot view this work log entry.

4.6.1.2.7 [Summary](#)

Short description of the work log entry. To enter or view additional information, click the Long Description button.

4.6.1.2.8 [Details](#)

This is the long description for the work log entry. Information that doesn't fit into the short description should be placed in this section.

4.6.2 [New Row Button](#)

This is the button used to add a new work log to the current work order.

4.7 [Failure Reporting Tab](#)

This tab shows all the relevant information for the failure reporting features of the work order.

4.7.1 [Failure Details](#)

The details for the currently selected failure code are shown in this section.

4.7.1.1 [Failure Class](#)

Failure class of the defined work asset. The failure class is the top level of the failure hierarchy.

4.7.1.2 [Failure Class Description](#)

The Failure Code Description provides more information and detail about the Failure Code.

4.7.1.3 Failure Date

Date when the Failure Code was entered.

4.7.1.4 Remarks

A comment about the reported failure.

4.7.1.5 Remark Date

Date and time the remark for the failure code was entered.

4.7.2 Failure Codes

All failure codes (Problem, Cause, and Remedy) are shown in this section.

4.7.2.1 Type

Shows what “kind of failure code is displayed, Problem, Cause, or Remedy.

4.7.2.2 Failure Code

The name of the failure code for the row.

4.7.2.3 Description

The description of the failure code of that row.

4.7.2.4 Select Failure Codes

Allows the selection of the appropriate level of failure code.

5.0 Assets

Assets in Maximo can be talking about many different things. Equipment, locations, meters, and conditioning monitoring are all considered part of the asset application. This section will concentrate on the equipment portion of the asset designation.

5.1 Asset List Tab

This tab is the default tab that is shown when a user first navigates to the asset application. The example below shows a typical example of a list tab with results displayed.

Find Asset

Find Navigation Item

Go To Applications

My Recent Applications

- Administration
- Analytics
- Assets
- Change
- Contracts
- Financial
- Integration

Available Queries

- All Records
- All Bookmarks
- Assets with devices

Common Actions

- New Asset
- Change Status
- Move/Modify Assets
- Swap Assets
- Create KPI
- Create Report
- Application Import
- Application Export

More Actions

- Add Assets to Collections
- Open Drilldown
- Unit of Measure and Conversion
- Zero Asset Costs
- Attachment Library/Folders
- Associate Time Zone
- Run Reports
- Cognos Reporting

Advanced Search | Save Query | Bookmarks

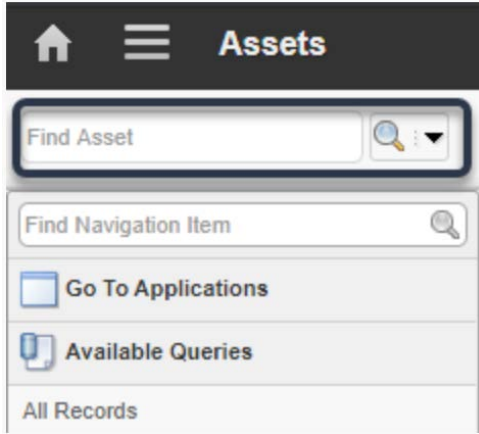
Assets | Filter | 1 - 20 of 8822

Asset	Description	Location	Description	Parent
1	AIR HANDLER (AHU 1) - 200 ACADEMY ST	NC16-99-0000	200 ACADEMY ST	
10	PUMP (CWP 1) - 413 ACADEMY ST	NE08-99-0000	413 ACADEMY	
100	PUMP (RHP 1) - ALFRED LERNER	NW81-99-0000	ALFRED LERNER HALL	
1000	EXHAUST FAN (EF 7 (RA 1)) - HARRINGTON COMMONS	NE30-99-0000	HARRINGTON COMMONS	
1001	FAN (AHU 1 SUPPLY) - HARRINGTON COMMONS	NE30-02-0201	HARRINGTON COMMONS-MECHANICAL AREA	2961
1002	FAN (AHU - 1 RETURN) - HARRINGTON COMMONS	NE30-02-0201	HARRINGTON COMMONS-MECHANICAL AREA	2961
1003	FAN (AHU 2 SUPPLY) - HARRINGTON COMMONS	NE30-02-0204	HARRINGTON COMMONS-MECHANICAL AREA	2962
1004	FAN (AHU 2 RETURN) - HARRINGTON COMMONS	NE30-02-0204	HARRINGTON COMMONS-MECHANICAL AREA	2962
1005	FAN (AHU 3 SUPPLY) - HARRINGTON COMMONS	NE30-02-0204	HARRINGTON COMMONS-MECHANICAL AREA	2963
1006	FAN (AHU 3 RETURN) - HARRINGTON COMMONS	NE30-02-0204	HARRINGTON COMMONS-MECHANICAL AREA	2963
1007	AIR HANDLER (AHU 5) - HARRINGTON COMMONS	NE30-99-0000	HARRINGTON COMMONS	
1008	AIR HANDLER (AHU 1) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
1009	AIR HANDLER (AHU 2) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
101	PUMP (RHP 2) - ALFRED LERNER	NW81-99-0000	ALFRED LERNER HALL	
1010	AIR COMPRESSOR (COMP 1) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
1011	AIR COMPRESSOR (COMP 2) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
1012	PUMP (HWP 1) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
1013	PUMP (HWP 2) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
1014	AIR DRYER (AD) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL	
1015	AIR HANDLER (AHU 6) - HARTSHORN GYM	NC27-99-0000	HARTSHORN HALL	

Select Records

5.1.1 Direct Search box

This is the quickest way to go to a specific asset if the asset number is known. Type in the asset number, press the enter key and if found, the asset will be displayed on the asset tab immediately.



5.1.2 More Search Fields Spy Glass icon

Clicking on the spy glass icon next to the Direct Search box will bring up the More Search Fields, or Advanced Search window which has many different asset fields available to search on. The drop-down arrow shows options.

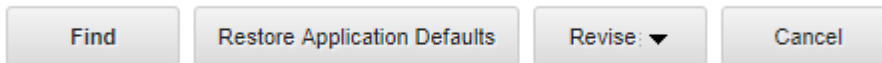
- **More Search fields window** (Shown to the right)
- **Where clause** (Allows a SQL where clause to be entered)
- **Attribute search** (Allows searching by specific attributes)

A screenshot of the 'More Search Fields' search window. The title is 'More Search Fields| Current Query:'. The window is divided into several sections. The top section contains various search fields: 'Asset', 'Parent', 'Search Asset Hierarchy', 'Loc. Request', 'Location', 'Floor/Room', 'Vicinity', 'Location Type', 'Manufacturer', 'Classification', 'Type', 'Status', 'Priority', 'Serial #', 'Failure Class', 'Compliance', and 'GL Account'. Each field has a text input box and a magnifying glass icon. The 'Dates' section has 'Installation Date' with 'From' and 'To' date pickers. The 'Address Information' section has 'Service Address', 'Formatted Address', 'Street Address', 'City', 'Region/District', 'County', 'State/Province', 'Zip/Postal Code', 'Country', 'GEO Code', and 'Time Zone'. At the bottom right, there are four buttons: 'Find', 'Restore Application Defaults', 'Revise', and 'Cancel'.

- **View Search tips** (Help page that shows various searching tips)
- **Save Current Query** (Ability to save the current search criteria as a query for availability later)
- **View/Manage Queries** (Displays a new window of all saved queries, and allows deletion or changes to be made)
- **Bookmarks** (Displays a window of all the saved assets as bookmarks)

5.1.2.1 [More Search Fields buttons](#)

This section will talk about the buttons on the bottom of the More Search Fields window.



5.1.2.1.1 [Find](#)

Find will execute the query with the current field criteria in the More Search Fields window.

5.1.2.1.2 [Restore Application Defaults](#)

This button will return all fields to the default values. Currently the University does not have any default values for this application.

5.1.2.1.3 [Revise](#)

The Revise button has four options.

- **Clear Query and Fields** – This option removes the current query and clears all the fields.
- **Clear All Fields** - This option retains the current query but clears all fields. Clear All Fields has the same effect as the Restore Application Defaults button if there is no default query specified for the application
- **Change Query** - This option opens a new dialog box which has the same contents as the View/Manage Queries window in that application. You can select a query against which the More Search Fields parameters are applied.
- **Restore Default Query** - This option restores your personal default query but does not affect any fields.

5.1.2.1.4 [Cancel](#)

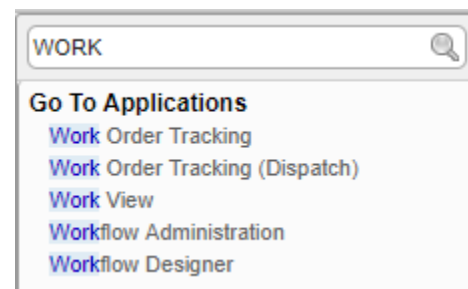
This will cancel any search that is queued to run and close the More Search Fields window.

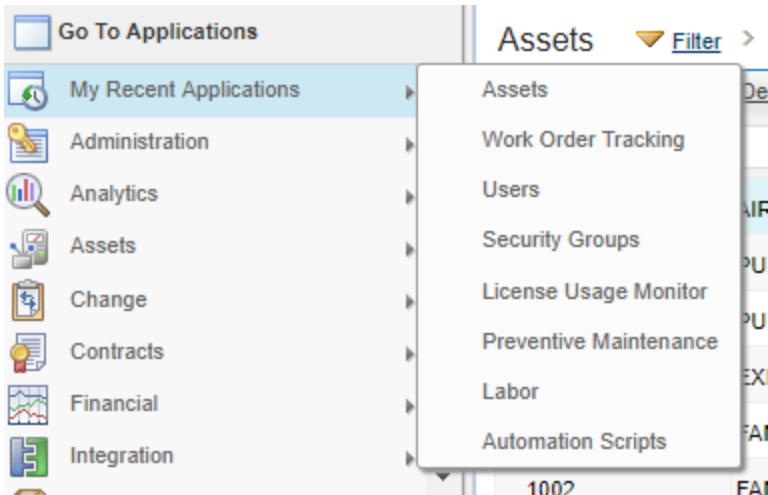
5.1.3 [Find Navigation Item](#)

From this search box, you can start typing in the name of an application to quickly find another application. Such as “WORK” for work order tracking.

5.1.4 [Go To Applications](#)

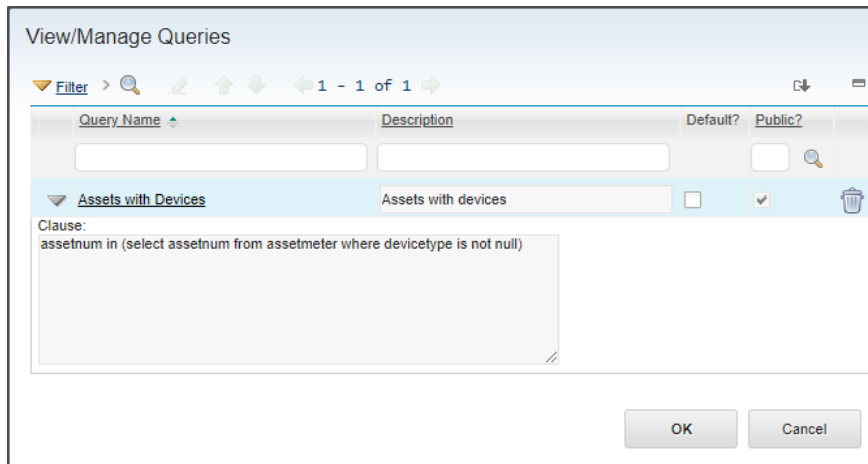
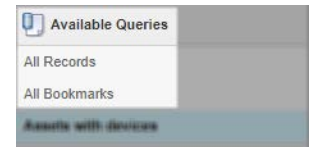
This section is minimized by default. Includes the normal Go To menu and My Recent Applications which keeps a list of recently used applications in case you want to quickly switch back to a recent one.





5.1.5 Available Queries

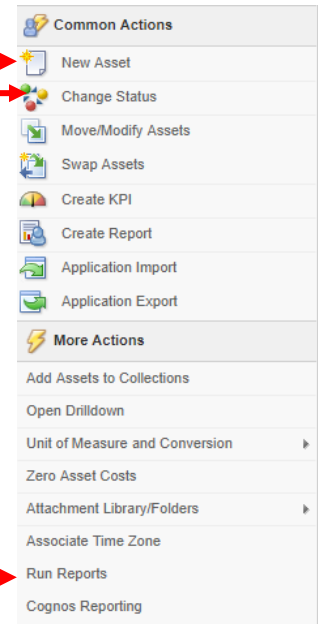
Any saved queries, as well as options to show all records in the result set list window, and to show all bookmarks. At the bottom of the Available Queries, there is an option to View More Queries if the user has more queries that can be displayed in the window. If selected, a pop-up window will show all the queries the user has.



5.1.6 Select Action Menu

The Select Action menu, on the left by default, contains different actions you can take depending on the tab of the asset record. On the Asset list screen, the options are very limited. Those that pertain to University of Delaware’s usage of Maximo include:

- **New Asset** – Allows the creation of a new asset
- **Change Status** – Allows the bulk changing of the statuses on the Asset list screen
- **Run Reports** – Use this to access the report menu for Assets.



5.1.7 Icons

The following icons are available on the Asset List tab

1. New Asset Record
2. Save Changes
3. Clear Changes
4. Previous Record
5. Next Record
6. View History
7. Direct Print: Asset Purchase Order Details
8. Direct Print: Asset Details



Clear Changes is not used very often, View History can't be used on the Asset list screen and numbers 7 and 8 should work, but 7 won't show any results since the University doesn't use internal purchase orders at this time.

5.1.8 Advanced Search Drop Down menu

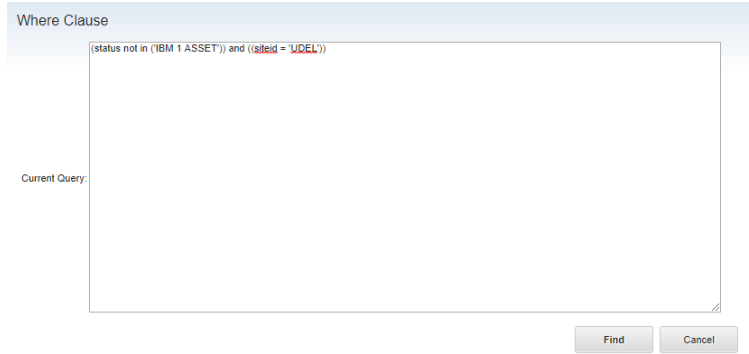
This menu allows for searching using multiple fields, a SQL where clause, and finally an attribute search.

5.1.8.1 More Search Fields

When opened, the More Search Fields window contains many more fields that can be used to filter and limit the results in the list screen(See section 5.1.2).

5.1.8.2 Where Clause

The Where Clause allows advanced users to use SQL language to tailor the query to get the results they want.



5.1.8.3 Attribute Search

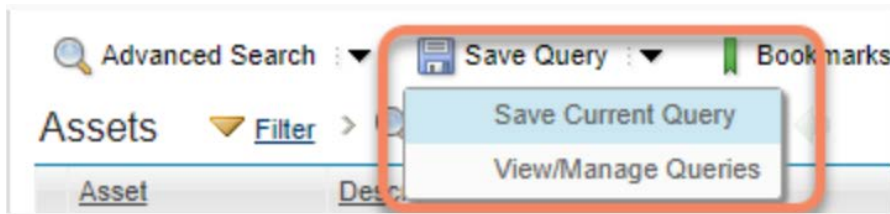
This allows a user to search by specific attributes. This function is not fully utilized by UDEL due to current lack of information, but usability will change as more information on each individual asset is collected.

5.1.8.4 View Search Tips

This opens the help page to show various searching tips.

5.1.9 Save Query Drop Down menu

The Save Query Drop Down window allows the user to save a current query or view and manage the queries that are available to them.



5.1.9.1 Save Current Query

This is how a user can save a currently displayed query. A name and description in all caps are required. A query can be saved at a private, public or default query. The University of Delaware does not use public queries. A default query would be a query that runs automatically when the Asset application is loaded.

5.1.9.2 View/Manage Queries

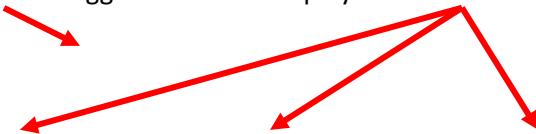
With this option, a user can view all the queries in their profile, including the where clause that makes up that query. Also allows the deletion of the query.

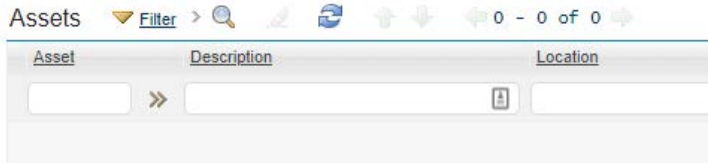
5.1.10 Bookmarks

Just like in a web browser, certain asset records can be bookmarked to come back to later if needed.

5.1.11 Filter Toggle

The filter toggle allows the display of the filter row of the Asset list screen.





5.1.12 Filter Search

Allows quick filter search of the current result set. An example would be searching for Gore Hall in the Location Description field to filter out anything that isn't Gore Hall

The screenshot shows the Assets interface with a list of assets. The "Location" field is filtered to "GORE HALL". The list contains the following assets:

Asset	Description	Location
2422	EMERGENCY GENERATOR (GEN) - DIESEL - GORE HALL	NC36-99-0000
2826	TRANSFORMER (PTR) - GORE HALL	NC36-99-0000
3873	FIRE ALARM CONTROL PANEL (FAL) - GORE HALL	NC36-01-0108
6125	BACKFLOW PREVENTER - GORE HALL - DOMESTIC	NC36-01-0114
6226	FIRE PUMP - GORE HALL	NC36-99-0000
6829	BACKFLOW PREVENTER - GORE HALL - FIRE MAIN	NC36-01-0107
6128	PRESSURE REDUCING VALVE (PRV 1) - GORE HALL	NC36-99-0000
6878	ELEVATOR (ELY #1) - GORE HALL	NC36-99-0000

5.1.13 Refresh

When an asset record is changed in some way in a result set, it is represented in a blue italicized font on the list screen like in the example below, but the updated information is not shown.

The screenshot shows the Assets interface with a list of assets. The "Location" field is filtered to "GORE HALL". The asset with ID 2422 is highlighted in blue and italicized, indicating it has been updated. The list contains the following assets:

Asset	Description	Location
<i>2422</i>	<i>EMERGENCY GENERATOR (GEN) - DIESEL - GORE HALL</i>	<i>NC36-99-0000</i>
2826	TRANSFORMER (PTR) - GORE HALL	NC36-99-0000
3873	FIRE ALARM CONTROL PANEL (FAL) - GORE HALL	NC36-01-0108
6125	BACKFLOW PREVENTER - GORE HALL - DOMESTIC	NC36-01-0114
6226	FIRE PUMP - GORE HALL	NC36-99-0000
6829	BACKFLOW PREVENTER - GORE HALL - FIRE MAIN	NC36-01-0107
6128	PRESSURE REDUCING VALVE (PRV 1) - GORE HALL	NC36-99-0000
6878	ELEVATOR (ELY #1) - GORE HALL	NC36-99-0000

Clicking the refresh button will refresh the query and show any changes that were made to the work order.

5.1.13.1 Result Set Numbers

The result set numbers will show how many assets that are currently displayed, and how many in total are in the result set. In the example to the right, work orders 1-20 are currently displayed, and there is a total of 26 assets are in the result set total.



5.1.14 Download

On the far right of the Asset list screen there is a download link. That allows the user to download the current result set to Excel for further investigation of the result set.

5.2 Asset Tab

This tab is where the main information about the asset is located. This section is split into five columns.

5.2.1 General Information

This section contains most of the general information for an asset including asset number, type and status.

The screenshot shows the Maximo Asset Tab interface. At the top, there is a navigation bar with tabs: List View (selected), Asset, Spare Parts, Safety, Meters, Specifications, Work, Service Address, and Map. Below the navigation bar, the asset information is displayed in a grid-like format. The 'Asset' field contains '1006' and a search icon. The 'Asset' field also contains 'FAN (AHU 3 RETURN) - HARRINGTON COMMONS' with a print icon and a comment icon. The 'Status' field contains 'OPERATING'. The 'GL Account' field contains 'PLNT112118.?' with a search icon. The 'Site' field contains 'UDEL'. The 'Type' field contains 'FAN' with a search icon. The 'Asset Template' field contains 'FAN' with a search icon. On the right side, there are three checkboxes: 'Attachments' (checked), 'Labeled?' (checked), and 'Verified?' (unchecked).

5.2.1.1 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.2.1.2 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.2.1.3 Asset Long Description

Includes all information that is relevant to the current Asset and doesn't have a space in another part of the Asset application.

5.2.1.4 Status

The status of the Asset, such as OPERATING, DECOMMISSIONED, or MISSING. See Appendix 10 for more information.

5.2.1.5 GL Account

General ledger account code to which Asset costs are charged. The GL (General Ledger) account consists of up to three components: purpose code (sometimes incorrectly referred to as speed type), account, and user defined, each separated by a period. Only the purpose code is entered in Maximo. Other components are indicated by ten question marks (??????????).

5.2.1.6 Site

Shows the site that the asset is located. The University functions under one site, UDEL.

5.2.1.7 Type

The type of equipment that the current asset is. Examples include FAN, AHU, and ELV. See [Appendix 11](#) for more information.

5.2.1.8 Asset Template

The Asset Template acts as a general format for the Asset. The Asset Type, and Specifications are created based on the selected template.

5.2.1.9 Attachments

Any supplemental information that can't be contained in the long description can be attached to the work order. This can include pictures, PDF documents, and web pages. Specific UD examples would involve floor plans, manufacturer's manuals, and pictures of the asset.

The following file types can be attached to an asset.

- PDF – Portable Document Format
- XLS – Excel file format (spreadsheet)
- CSV – Comma Separated Values
- TXT – Text file
- DOC – Word file format
- GIF – Graphics Interchange Format (picture)
- JPG – Picture file
- PPT – PowerPoint file format

5.2.1.10 Labeled

This checkbox indicates if the asset has been labeled. The definition of what is considered Labeled is that the label has been printed and given to the appropriate shop to be applied.

5.2.1.11 Verified

This checkbox shows if the information on the asset record has been field verified.

5.2.2 Details

This section contains more detailed information such as the parent asset, location, and serial number.

Details

Parent: <input type="text"/> >> <input type="text"/>	Calendar: <input type="text"/>
Maintain Hierarchy? <input type="checkbox"/>	Shift: <input type="text"/>
Location: NC01-99-0000 >> HULLIHEN HALL	Priority: <input type="text"/>
Floor/Room: <input type="text"/>	Serial #: <input type="text"/>
Vicinity: 3RD FLOOR MECHANICAL ROOM	Failure Class: <input type="text"/> >>
Rotating Item: <input type="text"/> >> <input type="text"/>	Compliance: <input type="text"/>
Condition Code: <input type="text"/> >> <input type="text"/>	Item Type: <input type="text"/>
Meter Group: <input type="text"/> >> <input type="text"/>	Tool Rate: <input type="text"/>
Usage: <input type="text"/>	

5.2.2.1 Parent Asset

If the current asset has a parent asset, such as a supply fan has an air handler as a parent, the parent asset number will be listed here.

5.2.2.2 Parent Asset Short Description

The short description of the parent asset.

5.2.2.3 Parent Asset Long Description

The long description of the parent asset.

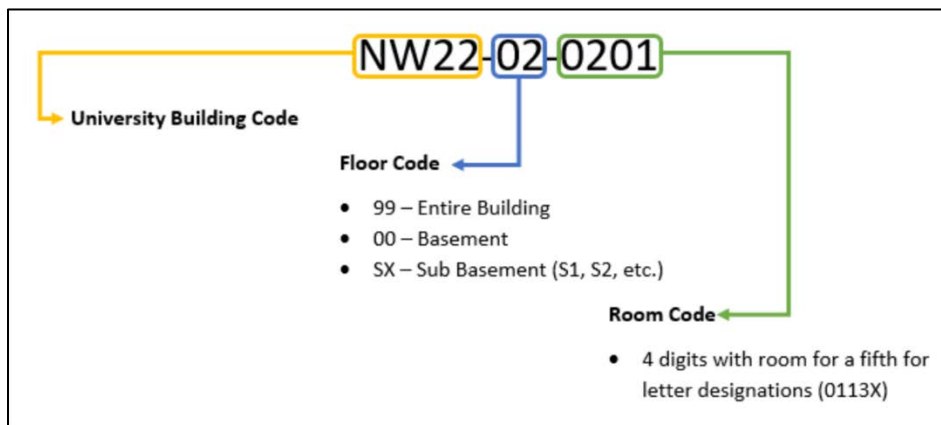
5.2.2.4 Maintain Hierarchy

The summary is that the Maintain Hierarchy checkbox is optionally used to preserve and manage an asset hierarchy, and location, as well. The functional usage implied from the 3 points below is that you can use it to move a large hierarchy to different locations via the parent asset. Conversely, it can be toggled off for a scenario whereby a child asset, or subset of child assets need to be moved to a different location, or otherwise removed from the asset hierarchy.

- If the Maintain Hierarchy flag on a parent asset in a hierarchy is checked, the child assets cannot be removed from the asset hierarchy. The child assets cannot be moved to a new location.
- When the Maintain Hierarchy flag on a parent asset is unchecked, then the child assets can be removed from an asset hierarchy, and child assets can also be moved to different locations than the parent asset; the parent/child asset relationship remains intact.
- In both scenarios (Maintain Hierarchy flag on parent asset is either checked or unchecked), the child asset locations will be moved to the parent asset location when the parent asset is moved to a new location.

5.2.2.5 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the asset is physically located.



5.2.2.6 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

5.2.2.7 Location Long Description

Any valuable information about the location is stored in this field.

5.2.2.8 Floor/Room

This field was used before the switch to a room level location hierarchy. It is no longer used, and only remains as a stability fix.

5.2.2.9 Vicinity

The vicinity field is a free form text field that helps narrow down the specific area of the asset location. Examples would be second unit from the door, near the window, and the red one.

5.2.2.10 Rotating Item

If an asset is a rotating asset, it must also be part of the inventory of the site. This field is for the inventory number cross reference. Currently not used at the University.

5.2.2.11 Rotating Item Description

Describes the rotating asset.

5.2.2.12 Condition Code

Used to describe the various physical states of an item. Currently not used at the University.

5.2.2.13 Condition Code Description

This field describes the Condition Code.

5.2.2.14 Meter Group Code

A code for a grouping of meters associated with the asset.

5.2.2.15 Meter Group Description

A description of the meter group.

5.2.2.16 Usage

Describes what the asset is used for.

5.2.2.17 Calendar

A predetermined calendar for the asset to be used for scheduling.

5.2.2.18 Shift

The shift associated with the calendar for the asset.

5.2.2.19 Priority

Identifies the importance of the asset on a 1-5 scale (5 being the highest priority). This value is copied to the work order when the asset is selected on the work order.

5.2.2.20 Serial

The unique serial number assigned to the asset by the manufacturer.

5.2.2.21 Failure Class

Indicates the failure class that should be used for the asset.

5.2.2.22 Compliance

Signifiers for various compliance protocols, such as local, state, federal, and University guidelines. See Appendix [4](#) for more details.

5.2.2.23 [Item Type](#)

This field denotes the type of item from an inventory standpoint an asset is. Only used by rotating assets. Currently not used at the University

5.2.2.24 [Tool Rate](#)

An hourly rate if the asset is eligible for rental purposes. Like a tool rental.

5.2.3 [Address Information](#)

This section consists of address information about the asset. Currently not used at the University.

Address Information

Service Address:	<input type="text"/>	»	<input type="text"/>		City:	<input type="text"/>	
Formatted Address:	<input type="text"/>				State/Province:	<input type="text"/>	
Street Address:	<input type="text"/>					Address:	<input type="text"/>

5.2.3.1 [Service Address](#)

A unique location for the asset. Can be inherited from the location listed for the asset.

5.2.3.2 [Service Address Description](#)

The description of the Service Address.

5.2.3.3 [Formatted Address](#)

This address is formatted according to the map provider's requirements and is updated when a location is found on the map tab. Formatted addresses are used to search for addresses on the map tab.

5.2.3.4 [Street Address](#)

The street address details of the service address, such as the house number, the street direction prefix, and the name of the street. Additional details can include the type of street, the street direction suffix, and whether the address is an apartment, a unit, or a suite.

5.2.3.5 [City](#)

The city of the service address.

5.2.3.6 [State/Province](#)

The state or the province of the service address.


5.2.3.7 [Address](#)


Service Address of the ancestor location


5.2.4 [Purchase Information](#)

Section includes the information about the vendor, manufacturer, and PO information.


Purchase Information

Vendor: » 

Manufacturer: » 

Installation Date: 

Expected Life:

Estimated EOL: 

▣ Purchase Price:

▣ Replacement Cost:

PO: »

5.2.4.1 Vendor Code

The code of the company who sold the asset to the University.

5.2.4.2 Vendor Description

The description of the vendor code which is usually the full name of the vendor.

5.2.4.3 Manufacturer Code

The code of the company who created the asset.

5.2.4.4 Manufacturer Description

The description of the manufacturer code which is usually the full name of the manufacturer.

5.2.4.5 Installation Date

The date the asset was installed.

5.2.4.6 Expected Life

Expected life of the asset, expressed in years. This value is based on the typical useful life that a manufacturer or industry standard recommends for an asset or asset type

5.2.4.7 Estimated EOL

The date when the asset reaches its end of life. This date is based on the condition of the asset.

5.2.4.8 Purchase Price

The price of the asset when purchased.

5.2.4.9 Replacement Cost


The cost required to replace the asset.

5.2.4.10 PO

The purchase order that was used to purchase the asset.

5.2.5 Downtime

This section describes if the asset is currently running, status date, and total downtime.

Downtime 

Asset Up?

Status Date:

Total Downtime:

5.2.5.1 Asset Up

Indicates if the asset is currently running or not running.

5.2.5.2 Status Date

This shows the date the status was changed.

5.2.5.3 Total Downtime

The total time that the asset has been down over its lifetime.

5.2.6 Modified

Section that shows who modified the asset record last and when it was modified.

Modified 

Changed By:

Changed Date:
 

5.2.6.1 Changed By

The Maximo user that last changed the asset record.

5.2.6.2 Changed Date

Date/Time stamp that the asset record was changed.

5.3 Spare Parts Tab

The Spare Parts tab shows the children of the current asset, and any spare parts available for the asset.

5.3.1 General Information

Shows basic information about the asset such as asset number and site.

Asset: 1032 FAN (AHU 1 SUPPLY) - HULLIHEN HALL Site: UDEL

Parent: 1008 AIR HANDLER (AHU 1) - HULLIHEN HALL

5.3.1.1 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.3.1.2 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.3.1.3 Asset Long Description

Includes all information that is relevant to the current Asset and doesn't have a space in another part of the Asset application.

5.3.1.4 Parent Asset Number

If the current asset has a parent asset, such as a supply fan has an air handler as a parent, the parent asset number will be listed here.

5.3.1.5 Parent Asset Description

The short description of the parent asset.

5.3.1.6 Site

Shows the site that the asset is located. The University functions under one site, UDEL.

5.3.2 Subassemblies

Shows a list view and detail view of any children assets, also known as subassemblies

Subassemblies Filter > 1 - 2 of 2

Asset	Description	Location	Description
1032	FAN (AHU 1 SUPPLY) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL
1033	FAN (AHU 1 RETURN) - HULLIHEN HALL	NC01-99-0000	HULLIHEN HALL

Details

Asset: 1032 FAN (AHU 1 SUPPLY) - HULLIHEN HALL

Location: NC01-99-0000 HULLIHEN HALL

New Row

5.3.2.1 List

The list portion of the subassembly section shows a brief listing of values for each child asset. Clicking on the arrowhead will expand the row to reveal the details section.

5.3.2.2 Details

Contains more information about each child asset.

5.3.2.2.1 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.3.2.2.2 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.3.2.2.3 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the asset is physically located.

5.3.2.2.4 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

5.3.2.2.5 New Row Button

Clicking this button allows for the adding of additional child assets, or subassemblies.

5.3.3 Spare Parts

This section would show any spare parts that could be used for the current asset.

Spare Parts [Filter](#) > 1 - 1 of 1

Item	Description	Quantity	IssuedQty	Remarks
<input type="text"/>	<input type="text"/>	1.00	0.00	<input type="text"/>

Details

* Item:

* Quantity:

IssuedQty:

Remarks:

[Select Spare Parts](#) [New Row](#)

5.3.3.1 List

The list portion of the Spare Parts section shows a brief listing of all spare parts. Clicking the arrowhead to the right of the row will expand the details section.

5.3.3.2 Details

This contains more information about the currently selected spare part.

5.3.3.2.1 Item Number

The item number of the spare part.

5.3.3.2.2 Item Description

The description of the spare part.

5.3.3.2.3 Quantity

The quantity needed for the spare part.

5.3.3.2.4 Issued Quantity

The total amount of the current spare part issued.

5.3.3.2.5 Remarks

Any remarks for the current spare part would be recorded here.

5.3.3.2.6 Select Spare Parts Button

Allows the quick selection of more spare parts to associate with the current asset.

5.3.3.2.7 [New Row Button](#)

Allows more spare parts to be added to the asset.

5.4 [Safety Tab](#)

The Safety Tab includes all the information to safely work on an asset

5.4.1 [General Information](#)

Includes basic information like the asset number and description.

Asset:	<input type="text" value="1009"/>	<input type="text" value="AIR HANDLER (AHU 2) - HULLIHEN HALL"/>	<input type="text" value="UDEL"/>
---------------	-----------------------------------	--	-----------------------------------

5.4.1.1 [Asset Number](#)

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.4.1.2 [Asset Short Description](#)

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.4.1.3 [Asset Long Description](#)

Includes all information that is relevant to the current Asset and doesn't have a space in another part of the Asset application.

5.4.1.4 [Site](#)

Shows the site that the asset is located. The University functions under one site, UDEL.

5.4.2 [Hazards and Precautions Sub Tab](#)

This sub tab will show any hazards associated with the current asset along with the precautions to take to avoid those hazards.

Hazards and Precautions | Hazardous Materials | Lock Out/Tag Out | Safety-Related Assets

Hazards [Filter](#) > 1 - 1 of 1

Hazard	Description	Can Have Hazardous Materials?	Type
HEAT1	Temperature from 100f - 400f	<input type="checkbox"/>	

Details

Hazard: HEAT1 >> Temperature from 100f - 400f Can Have Hazardous Materials? Type:

[New Row](#)

Precautions for HEAT1 [Filter](#) > 1 - 1 of 1

Precaution	Description
GLOVES	Wear Gloves

Details

Precaution: GLOVES >> Wear Gloves

5.4.2.1 Hazards

A hazard is a possible source of danger and this section lists all potential hazards.

5.4.2.1.1 List

A simple list of all hazards. Clicking the arrowhead to the left of the row will show the details section.

5.4.2.1.2 Details

Shows more detailed information about the hazard.

5.4.2.1.2.1 Hazard Code

The code for the current hazard.¹

5.4.2.1.2.2 Hazard Description

The description of the hazard.

5.4.2.1.2.3 Can Have Hazardous Materials

This checkbox indicates if the hazard is a material.

5.4.2.1.2.4 Type

The type of hazard.

5.4.2.1.2.5 New Row

Allows more hazards to be added to the asset record.

5.4.2.2 Precautions For

If a hazard has a precaution listed for it, it will be listed here.

¹ Hazards are defined in the Hazards application in Maximo.

5.4.2.2.1 Precaution Code

The code of the precaution.

5.4.2.2.2 Precaution Description

The description of the precaution.

5.4.3 Hazardous Materials Sub Tab

If there are any hazardous materials associated with the asset, they will be listed here.

The screenshot displays the 'Hazardous Materials' sub-tab. At the top, there are navigation tabs: 'Hazards and Precautions', 'Hazardous Materials' (selected), 'Lock Out/Tag Out', and 'Safety-Related Assets'. Below the tabs is a search and filter area with a 'Filter' button and a search icon. A table lists hazardous materials with columns: Hazard, Description, MSDS, Health, Flammability, Reactivity, and Contact. One row is highlighted for 'SULFACID' with a value of 3 in the Health column. Below the table is a 'Details' section with fields for Hazard (SULFACID), Description (Sulfuric Acid), MSDS (SA-437), and NFPA Rating (Health: 3, Flammability: , Reactivity: , Contact: 7). A 'New Row' button is located at the bottom right.

5.4.3.1 List

A simple list of all hazardous materials for the current asset. Clicking the arrowhead to the left of the row will show the details section.

5.4.3.2 Details

Shows more detailed information about the hazardous material.

5.4.3.2.1 Hazard Code

The code for the current hazard

5.4.3.2.2 Hazard Description

The description of the hazard.

5.4.3.2.3 MSDS

Identifies what MSDS sheet to reference.

5.4.3.3 NFPA Rating

Code system to show the Health, Flammability, Reactivity, and Special Hazards of a material. Ratings from 0 (low) to 4 (high)

5.4.3.3.1 Health

NFPA Health Rating. (<https://www.nfpa.org/>)

5.4.3.3.2 Flammability

NFPA Flammability Rating.

5.4.3.3.3 Reactivity

NFPA Reactivity Rating.

5.4.3.3.4 Contact

NFPA Contact Rating.

5.4.3.3.5 New Row

Allows new hazardous materials to be listed on an asset.

5.4.4 Lock Out/Tag Out Sub Tab

Shows all Lock Out/Tag Out information for the various parts of an asset.

Hazards and Precautions Hazardous Materials **Lock Out/Tag Out** Safety-Related Assets

Hazards [Filter](#) > 1 - 1 of 1

Hazard	Description	Type
ELECTRIC	Electrocution	

Details

Hazard: ELECTRIC >> Electrocution

Type:

[New Row](#)

Tag Out Procedures for ELECTRIC [Filter](#) > 1 - 1 of 1

Tag Out	Description	Asset	Location
TAG333	Electrically isolate	11430	

Details

Tag Out: TAG333 >> Electrically isolate

Location: >> Centrifugal Pump 100GPM/60FT HD.

Asset: 11430 >>

Required State: EL-ISO

Apply Sequence:

Remove Sequence:

[New Row](#)

Lock Out Operations for TAG333 [Filter](#) > 1 - 3 of 3

Asset	Location	Description	Locking Device	Required State	Apply Sequence	Remove Sequence
		Breaker 429-A-13		OPEN	1	3
		Breaker 429-A-14		CLOSED	2	1
		Breaker 450-B-07		OPEN	3	2

Details

Lock Out: 1,001

Location: >>

Description: Breaker 429-A-13

Asset: >>

Locking Device Required State: OPEN

Apply Sequence: 1

Remove Sequence: 3

5.4.4.1 Hazards

The various hazards that require a lock out/tag out procedure.

5.4.4.1.1 List

A listing of all lock out/tag out hazards for the asset. Clicking the arrowhead to the left of the row will show the details section.

5.4.4.1.2 Details

Shows more information about the selected lock out/tag out hazard.

5.4.4.1.3 Hazard Code

The code of the hazard.

5.4.4.1.4 Hazard Description

The description of the hazard.

5.4.4.1.5 Type

The hazard type.

5.4.4.1.6 New Row

Allows additional hazards to be added.

5.4.4.2 Tag Out Procedures For

The specific tag out procedure the selected hazard.

5.4.4.2.1 List

A listing of all tag out procedures for the selected hazard. Clicking the arrowhead to the left of the row will show the details section.

5.4.4.2.2 Details

Gives more details for the selected tag out procedure.

5.4.4.2.3 Tag Out Code

Identifies the tag out procedure.

5.4.4.2.4 Tag Out Description

Description for the tag out procedure.

5.4.4.2.5 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the asset is physically located.

5.4.4.2.6 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

5.4.4.2.7 [Asset Number](#)

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.4.4.2.8 [Required State](#)

Identifies the required state of the Tag Out asset

5.4.4.2.9 [Apply Sequence](#)

Identifies the sequence to apply a Tag Out Procedure

5.4.4.2.10 [Remove Sequence](#)

Identifies the sequence to remove a Tag Out Procedure

5.4.4.2.11 [New Row](#)

Allows more rows to be added to the tag out procedure.

5.4.4.3 [Lock Out Operations for](#)

Shows the various lock out operations for the tag out procedure selected.

5.4.4.3.1 [List](#)

Lists all the lock out procedures for the currently selected tag out procedure. Clicking the arrowhead to the left of the row will show the details section.

5.4.4.3.2 [Details](#)

Shows detailed information about the selected Lock Out Procedure.

5.4.4.3.3 [Lock Out Code](#)

Identifies the associated Lockout operation

5.4.4.3.4 [Location](#)

Identifies the location acting as a locking device

5.4.4.3.5 [Lock Out Description](#)

The description of the locking device if a defined location or asset is not defined

5.4.4.3.6 [Asset Number](#)

Identifies the asset acting as a locking device

5.4.4.3.7 [Locking Device Required State](#)

The required state of the locking device

5.4.4.3.8 [Apply Sequence](#)

Identifies the locking sequence for the Lockout operation

5.4.4.3.9 [Remove Sequence](#)

Identifies the unlocking sequence for the Lockout operation

5.4.5 [Safety-Related Assets Sub Tab](#)

This sub tab will show any safety-related assets assigned to the current asset.

5.4.5.1 List

Shows a summary of all the safety-related assets. Clicking the arrowhead to the left of the row will show the details section.

5.4.5.2 Details

Shows detailed information about the safety-related asset selected.

5.4.5.2.1 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.4.5.2.2 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the asset is physically located.

5.4.5.2.3 Asset Short Description

Describes the Asset.

5.4.5.2.4 New Row

Allows the addition of more safety-related assets.

5.5 Meters Tab

This tab shows all meters associated with the current asset.

5.5.1 General Information

Shows basic information such as asset number, meter group, and site.

Asset: 11230 EMERGENCY GENERATOR Site: BEDFORD
Meter Group: >> [Empty field with search icon]

5.5.1.1 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.5.1.2 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.5.1.3 Meter Group Code

A code for a grouping of meters associated with the asset.

5.5.1.4 Meter Group Description

A description of the meter group.

5.5.1.5 Site

Shows the site that the asset is located. The University functions under one site, UDEL.

5.5.2 Meters

This section shows each meter and allows the viewing of more detailed information about the selected meter.

Meters [Filter](#) > < 1 - 1 of 1 >

Sequence	Meter	Description	Meter Type	Unit of Measure	Active?	
<	<input type="text"/>	ODOM-KM >>	Odometer Reading in Kilometers	CONTINUOUS	KMS	<input checked="" type="checkbox"/>

Meter Details

Sequence: <input type="text"/>	Last Reading: 100
Meter: ODOM-KM >> Odometer Reading in Kilometers	Last Reading Date: 11/22/18 2:17 AM
Meter Type: CONTINUOUS	Last Reading Inspector: MAXIMO >>
Unit of Measure: KMS	Remarks: <input type="text"/>
Active? <input checked="" type="checkbox"/>	
Point: <input type="text"/> >>	

Continuous Meter Details

* Average Calculation Method: ALL All readings	Rollover: 500.00
Sliding Window Size: <input type="text"/>	* Reading Type: DELTA
Average Units/Day: 587,600.92	* Accept Rolldown From: ASSET
Life to Date for Asset: 1,100.00	

[New Row](#)

5.5.2.1 List

Lists all the meters associated with the selected asset. Clicking the arrowhead to the left of the row will show the details section.

5.5.2.2 Details

Shows more detailed information about the selected meter.

5.5.2.2.1 Sequence Number

Controls what meter is listed first, second, etc. Sequence numbers usually start at 10 and increase by 10 for each additional item.

5.5.2.2.2 [Meter Code](#)

Identifier for the meter attached to the asset.

5.5.2.2.3 [Meter Description](#)

The description of the meter.

5.5.2.2.4 [Meter Type](#)

Maximo supports three types of meters:

- Continuous – Are counters that increase in value like an odometer in a vehicle.
- Gauge – Will fluctuate and used in condition monitoring, like a thermostat.
- Characteristic – User defined and defined in a domain. Can be used to enter predefined values from a list.

5.5.2.2.5 [Unit of Measure](#)

Measurement unit associated with this meter.

5.5.2.2.6 [Active](#)

Is this asset's meter available to accept manual or rolled down readings, or to be used in PM or CM work order generation?

5.5.2.2.7 [Point](#)

Used for conditioning monitoring. The identifier for the monitoring point.

5.5.2.2.8 [Last Reading](#)

Last reading taken for this meter. This should be the same as the most recent meter reading. An asset that was used before it was added to the system will have an asset meter reading. The last meter reading for an existing asset can be used as the initial meter reading for that asset in the system.

5.5.2.2.9 [Last Reading Date](#)

Date and time of the last reading for this meter.

5.5.2.2.10 [Last Reading Inspector](#)

Inspector for this meter's most recent meter reading.

5.5.2.2.11 [Remarks](#)

Additional information supplied by the user regarding the meter reading record.

5.5.2.3 [Continuous Meter Details](#)

If a meter is identified as a continuous meter, additional details are listed here.

5.5.2.3.1 [Average Calculation Method Code](#)

Method used to calculate the average meter units per day:

- All – Uses all the readings to calculate the average of the reading.
- Sliding – Used a specific number of units to calculate the average of the reading.
- Static – Used to set the average reading and never recalculate it. Must supply a value in the Average Units/Day field.

5.5.2.3.2 [Average Calculation Method Description](#)

Description of the Average Calculation Method

5.5.2.3.3 [Sliding Window Size](#)

The number of readings, days, weeks or months to include in a sliding average meter unit calculation.

5.5.2.3.4 [Average Units/Day](#)

Average units per day for this meter

5.5.2.3.5 [Life to Date for Asset](#)

This value tracks the total use of an asset over its life span. It will always be equal to or exceed the last reading value and is used to determine the meter-based PM frequencies. If a meter does not roll over and is never replaced or reset, this value is the same as the last reading. Even if the meter rolls over or the physical meter is replaced or reset, this value continues to increase because the value is based on the asset.

5.5.2.3.6 [Rollover](#)

Point at which the asset's meter returns to the minimum value. Rollover applies to CONTINUOUS meters only.

5.5.2.3.7 [Reading Type](#)

Reading type for this meter:

- Continuous – Cumulative value.
- Delta – Incremental value.

5.5.2.3.8 [Accept Rolldown From](#)

Identifies whether an asset's meter accepts a reading delta from a parent asset's or location's meter. A value of NONE indicates that this Meter does not accept rolled down parent readings.

5.5.2.3.9 [New Row](#)

Allows an additional meter to be added to the asset.

5.6 [Specifications Tab](#)

The specifications tab shows the classification and attributes associated with the asset.

5.6.1 [General Information](#)

The general information section contains things such as the asset number, and classification.

Asset:	<input type="text" value="1001"/>	<input type="text" value="FAN (AHU 1 SUPPLY) - HARRINGTON COMMONS"/>	Site:	<input type="text" value="UDEL"/>
Classification:	<input type="text" value="ASSETS \ FAN"/>		Class Description:	<input type="text" value="FAN"/>

5.6.1.1 [Asset Number](#)

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.6.1.2 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.6.1.3 Classification

When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, like a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application.

5.6.1.4 Site

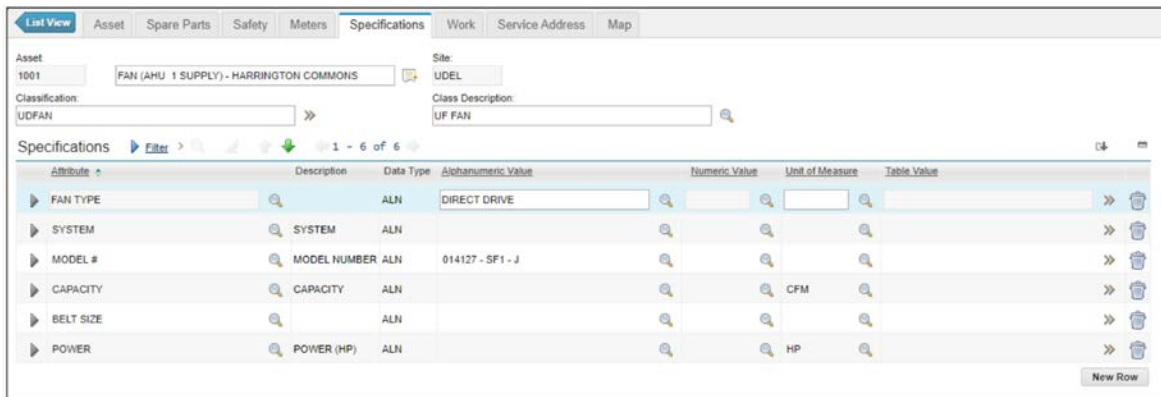
Shows the site that the asset is located. The University functions under one site, UDEL.

5.6.1.5 Class Description

Description of the classification specified for this record

5.6.2 Specifications

The specifications section shows any attributes for the current asset. The attributes are defined at the classification level and are tied to the asset template which is listed on the asset tab in the asset application.



The screenshot shows the 'Specifications' tab in the Maximo application. The interface includes a navigation bar with tabs for 'List View', 'Asset', 'Spare Parts', 'Safety', 'Meters', 'Specifications', 'Work', 'Service Address', and 'Map'. Below the navigation bar, there are input fields for 'Asset' (1001), 'Site' (UDEL), 'Classification' (UDFAN), and 'Class Description' (UF FAN). The main area displays a table of specifications with columns for 'Attribute', 'Description', 'Data Type', 'Alphanumeric Value', 'Numeric Value', 'Unit of Measure', and 'Table Value'. The table contains six rows of attributes: FAN TYPE (ALN, DIRECT DRIVE), SYSTEM (ALN), MODEL # (MODEL NUMBER ALN, 014127 - SF1 - J), CAPACITY (CAPACITY ALN, CFM), BELT SIZE (ALN), and POWER (POWER (HP) ALN, HP). Each row has a right-side navigation icon (two arrows) and a trash icon. A 'New Row' button is located at the bottom right of the table.

Attribute	Description	Data Type	Alphanumeric Value	Numeric Value	Unit of Measure	Table Value
FAN TYPE		ALN	DIRECT DRIVE			
SYSTEM		ALN				
MODEL #	MODEL NUMBER	ALN	014127 - SF1 - J			
CAPACITY	CAPACITY	ALN			CFM	
BELT SIZE		ALN				
POWER	POWER (HP)	ALN			HP	

5.6.2.1 List

Shows the list of attributes for the asset. Clicking the arrowhead to the left of the row will show the details section.

5.6.2.2 Details

Detailed information about the attribute is shown in this section.

5.6.2.2.1 Attribute

The name of an attribute defined for the classification specified for this asset.

5.6.2.2.2 Attribute Description

Description of the classification attribute

5.6.2.2.3 Data Type

The data type for the attribute. The different types are:

- **ALN** – Alphanumeric characters, mixed case, only one used at the University.
- **Numeric** –Only numbers.
- **Table/Domain** – Based on a pre-defined list of values.

5.6.2.2.4 Unit of Measure

A unit of measure specified for this classification attribute

5.6.2.2.5 Section

Section for a group of attributes

5.6.2.2.6 Alphanumeric Value

If the attribute data type is ALN, the value for the attribute will be listed here.

5.6.2.2.7 Numeric Value

If the attribute data type is Numeric, the value for the attribute will be listed here.

5.6.2.2.8 Table/Domain Value

If the attribute data type is Table, the value for the attribute will be listed here.

5.6.2.2.9 Inherited From

The path to the parent classifications for this classification.

5.6.2.2.10 Apply Down Hierarchy

If Y, this attribute is applied to all child classifications of this classification.

5.6.2.2.11 New Row

Allows the manual addition of more attributes.


5.7 Work Tab

Shows previous work, and associated PMs for the asset.

5.7.1 General Information

Includes information such as asset number, and work order details.

Asset: Site:

 [View Work Orders and Tickets that are open for this asset. Additional details are available in Work Details.](#)

5.7.1.1 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

5.7.1.2 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

5.7.1.3 Site

Shows the site that the asset is located. The University functions under one site, UDEL.

5.7.1.4 View Work Details button

Clicking this button will bring up a new window that shows information like previous work orders and current PMs.

5.7.1.4.1 Work Order view

The screenshot shows the 'View Work Details' window for the asset 'FAN (AHU 1 SUPPLY) - HARRINGTON COMMONS'. The 'Work Scope' is set to 'Site-Specific'. The 'Include Ancestors?' checkbox is checked. Below the asset information, there are tabs for 'Work', 'Preventive Maintenance', 'Routes', and 'Collections'. The 'Work' tab is active, displaying a table of work orders. The table has columns for Record, Class, Status, Reported Date, Target Start Date, Description, Priority, History?, and Is Task?. The first record is highlighted in blue.

Record	Class	Status	Reported Date	Target Start Date	Description	Priority	History?	Is Task?
485448	WORKORDER	COMP	4/5/17 2:31 AM	5/1/17 12:00 AM	PM AIR HANDLER (AHU 1) - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
491154	WORKORDER	COMP	4/13/17 12:13 PM	5/1/17 12:00 AM	PM AIR HANDLER (AHU 1) - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
601380	WORKORDER	COMP	9/28/17 9:41 AM	10/23/17 12:00 AM	CHANGE FILTERS IN AHU 1 - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
612944	WORKORDER	COMP	10/5/17 7:34 AM	10/23/17 12:00 AM	PM AIR HANDLER (AHU 1) - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
665527	WORKORDER	COMP	12/27/17 2:12 AM	1/22/18 12:00 AM	CHANGE FILTERS IN AHU 1 - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
736936	WORKORDER	COMP	4/2/18 7:48 AM	4/23/18 12:00 AM	CHANGE FILTERS IN AHU 1 - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
737174	WORKORDER	COMP	4/2/18 7:51 AM	4/23/18 12:00 AM	PM AIR HANDLER (AHU 1) - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
801403	WORKORDER	COMP	6/27/18 2:14 AM	7/23/18 12:00 AM	CHANGE FILTERS IN AHU 1 - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
879549	WORKORDER	COMP	9/26/18 2:13 AM	10/19/18 1:00 AM	CHANGE FILTERS IN AHU 1 - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>
879764	WORKORDER	COMP	9/26/18 2:15 AM	10/19/18 2:00 AM	PM AIR HANDLER (AHU 1) - HARRINGTON COMMONS		<input type="checkbox"/>	<input type="checkbox"/>

5.7.1.4.2 Preventive maintenance view

View Work Details

Asset: 1001 FAN (AHU 1 SUPPLY) - HARRINGTON COMMONS

Work Scope: Site-Specific Global

Include Children?

Include Ancestors?

Refresh

Work Preventive Maintenance Routes Collections

Preventive Maintenance Filter > 1 - 3 of 3

PM	Route	Job Plan	Earliest Next Due Date	Status
502023		HV-FC 2	1/23/19	ACTIVE
502207		HV AHU PM		INACTIVE
504180		HV AHU 2-2	4/23/19	ACTIVE

OK

5.7.1.4.3 Routes view

View Work Details

Asset: 1001 FAN (AHU 1 SUPPLY) - HARRINGTON COMMONS

Work Scope: Site-Specific Global

Include Children?

Include Ancestors?

Refresh

Work Preventive Maintenance Routes Collections

Routes Filter > 1 - 1 of 1

Route	Description	Job Plan
160	HARRINGTON COMMONS HVAC PM	

OK

5.7.1.4.4 Collections view

View Work Details

Asset: 1001 FAN (AHU 1 SUPPLY) - HARRINGTON COMMONS

Work Scope: Site-Specific Global

Include Children?

Include Ancestors?

Refresh

Work Preventive Maintenance Routes Collections

Collections Filter > 0 - 0 of 0

Collection	Description
There are no rows to display.	

OK

5.7.2 Work Orders Sub Tab

Shows any currently open work order for the asset.

Work Orders Tickets

Work Orders Filter > 1 - 8 of 8

Work Order	Description	Status	Status Date	Target Start	Target Finish	Scheduled Start	Scheduled Finish	Actual Start	Actual Finish
943022	CHANGE FILTERS IN AHU 5 - HARRINGTON COMMONS	COMP	1/23/19 9:17 AM	1/22/19 1:00 AM	1/22/19 2:00 AM	1/22/19 1:00 AM	1/22/19 2:00 AM	1/23/19 4:02 PM	1/23/19 9:17 AM
819486	AIR HANDLER #5 FAILED & VSD IS IN ALARM	COMP	7/20/18 9:44 AM					7/19/18 10:46 AM	7/20/18 9:44 AM
1079130	CHANGE FILTERS IN AHU 5 - HARRINGTON COMMONS	COMP	7/26/19 7:53 AM	7/23/19 12:00 AM	7/23/19 1:00 AM	7/23/19 12:00 AM	7/23/19 1:00 AM	7/18/19 1:48 PM	7/26/19 7:53 AM
1091567	AHU-5 IS DOWN	COMP	6/20/19 10:25 AM	7/18/19 7:39 AM				6/18/19 2:15 PM	6/20/19 10:25 AM
1213263	CHANGE FILTERS IN AHU 5 - HARRINGTON COMMONS	COMP	3/4/20 7:45 AM	3/17/20 3:00 AM	3/17/20 4:00 AM	3/17/20 3:00 AM	3/17/20 4:00 AM	3/3/20 2:44 PM	3/4/20 7:45 AM
1277304	CHANGE FILTERS IN AHU 5 - HARRINGTON COMMONS	COMP	3/2/20 7:37 AM	4/23/20 12:00 AM	4/23/20 1:00 AM	4/23/20 12:00 AM	4/23/20 1:00 AM	2/28/20 4:16 PM	3/2/20 7:37 AM
1291697	PM AIR HANDLER (AHU 5) - HARRINGTON COMMONS	WPCOND	3/19/20 8:33 AM	7/20/20 4:00 AM	7/20/20 6:00 AM	7/20/20 4:00 AM	7/20/20 6:00 AM		
1367562	CHANGE FILTERS IN AHU 5 - HARRINGTON COMMONS	WSCH	5/27/20 2:03 AM	7/20/20 9:00 AM	7/20/20 10:00 AM	7/20/20 9:00 AM	7/20/20 10:00 AM		

5.7.3 Tickets Sub Tab

Shows any currently open tickets for the asset.

Work Orders Tickets

Tickets Filter > 1 - 3 of 3

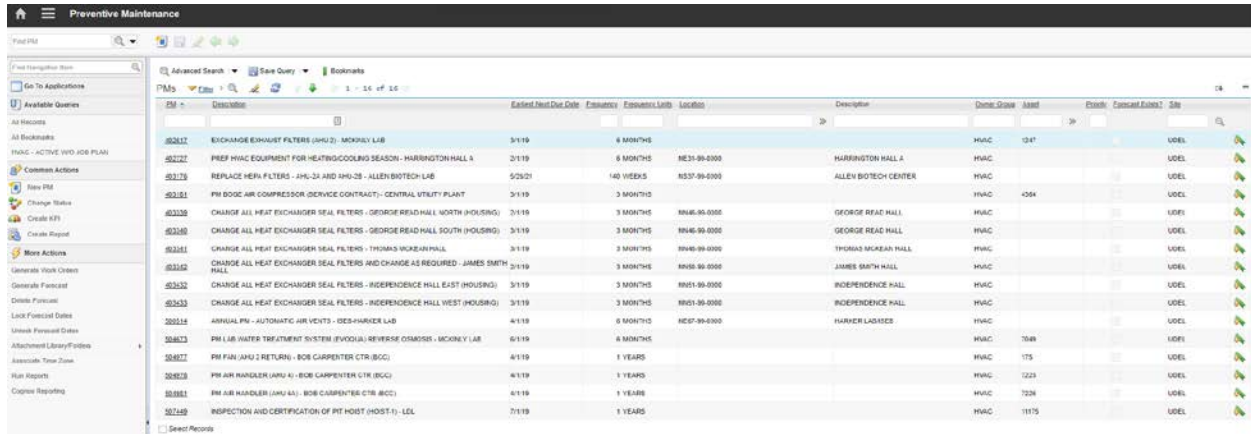
Ticket	Description	Status	Status Date	Reported By	Reported Date	Actual Finish	Person Affected
1064	Lights flickering in my office	QUEUED	10/7/04 8:41 AM	JONES	10/7/04 5:18 AM		JONES
1240	Perbaikan Ranmorddd	NEW	11/28/18 4:27 AM	MURTHY	11/28/18 4:27 AM		MURTHY
1242	Perbaikan Ranmorddd	NEW	11/28/18 4:45 AM	MURTHY	11/28/18 4:45 AM		MURTHY

6.0 Preventive Maintenance

Preventive Maintenance (PM), Operational Checks (OC) are work that is planned and repetitive. PMs and OCs can be time based, or condition based. The University currently only uses time-based PMs and OCs.

6.1 Preventive Maintenance List Tab

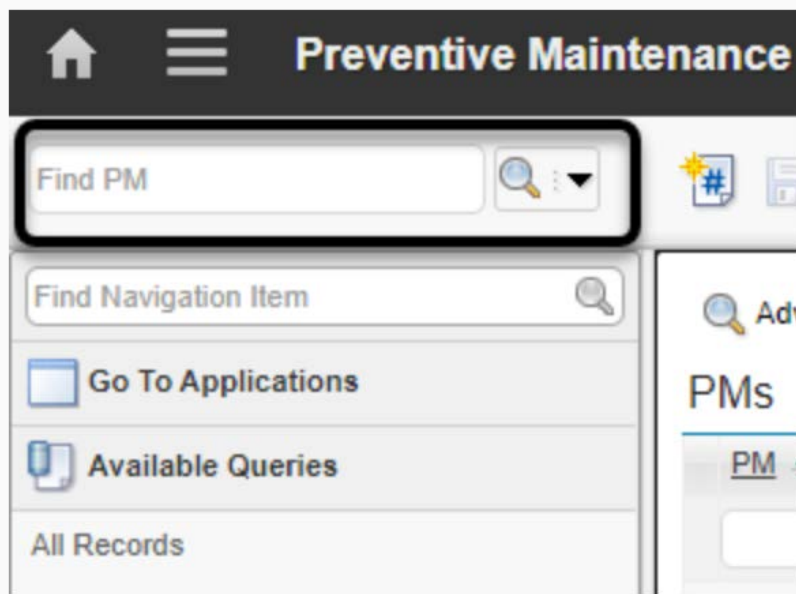
This tab is the default tab that is shown when a user first navigates to the preventive maintenance application. The example below shows a typical example of a list tab with results displayed.



PM #	Description	Earliest Next Due Date	Frequency	Frequency Units	Location	Description	Domestic Group	Asset	Priority	Forecast End Date	Site
002617	EXCHANGE EXHAUST FILTERS (AMU 2) - MCKINLEY LAB	3/1/19	6 MONTHS				HWAC	1247			UDEL
002727	PREF HWAC EQUIPMENT FOR HEATING/COOLING SEASON - HARRINGTON HALL A	3/1/19	6 MONTHS		BE31-99-0000	HARRINGTON HALL A	HWAC				UDEL
001779	REPLACE HEPA FILTERS - 4HS-3J AND 4HS-2S - ALLEN BIOTECH LAB	5/23/21	140 WEEKS		8537-99-0000	ALLEN BIOTECH CENTER	HWAC				UDEL
001261	PM BOSE AIR COMPRESSOR SERVICE CONTRACT - CENTRAL STUFTY PLANT	3/1/19	3 MONTHS				HWAC	4264			UDEL
001326	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - GEORGE READ HALL NORTH (HOUSING)	3/1/19	3 MONTHS		8946-99-0000	GEORGE READ HALL	HWAC				UDEL
001360	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - GEORGE READ HALL SOUTH (HOUSING)	3/1/19	3 MONTHS		8946-99-0000	GEORGE READ HALL	HWAC				UDEL
001461	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - THOMAS MCKEAN HALL	3/1/19	3 MONTHS		8946-99-0000	THOMAS MCKEAN HALL	HWAC				UDEL
001662	CHANGE ALL HEAT EXCHANGER SEAL FILTERS AND CHANGE AS REQUIRED - JAMES SMITH HALL	3/1/19	3 MONTHS		8946-99-0000	JAMES SMITH HALL	HWAC				UDEL
001653	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - INDEPENDENCE HILL EAST (HOUSING)	3/1/19	3 MONTHS		8946-99-0000	INDEPENDENCE HALL	HWAC				UDEL
001653	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - INDEPENDENCE HILL WEST (HOUSING)	3/1/19	3 MONTHS		8946-99-0000	INDEPENDENCE HALL	HWAC				UDEL
200114	ANNUAL PM - AUTOMATIC AIR VENTS - DESHARDER LAB	4/1/19	6 MONTHS		8027-99-0000	HARKER LABS/DES	HWAC				UDEL
200473	PM LAB WATER TREATMENT SYSTEM (WOODS) REVERSE OSMOSIS - MCKINLEY LAB	6/1/19	6 MONTHS				HWAC	7049			UDEL
200877	PM FIN (AMU 2) RETURN - BOB CARPENTER CTR (BOC)	4/1/19	1 YEARS				HWAC	175			UDEL
200879	PM AIR HANDLER (AMU 4) - BOB CARPENTER CTR (BOC)	4/1/19	1 YEARS				HWAC	1223			UDEL
200881	PM AIR HANDLER (AMU 4) - BOB CARPENTER CTR (BOC)	4/1/19	1 YEARS				HWAC	7226			UDEL
201749	INSPECTION AND CERTIFICATION OF PIT HOST (HOST 1) - LEL	7/1/19	1 YEARS				HWAC	11175			UDEL

6.1.1 Direct Search box

This is the quickest way to go to a specific preventive maintenance record if the preventive maintenance number is known. Type in the preventive maintenance number, press the enter key and if found, the preventive maintenance will be displayed on the preventive maintenance tab immediately.



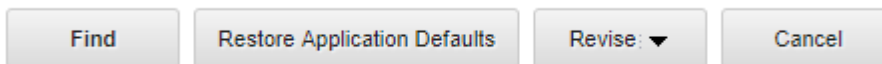
6.1.2 More Search Fields Spy Glass icon

Licking on the spy glass icon next to the Direct Search box will bring up the More Search Fields, or Advanced Search window which has many different PM fields available to search on. The drop-down arrow shows options.

- **More Search fields window** (Shown to the right)
- **Where clause** (Allows a SQL where clause to be entered)
- **Attribute search** (Allows searching by specific attributes)
- **View Search tips** (Help page that shows various searching tips)
- **Save Current Query** (Ability to save the current search criteria as a query for availability later)
- **View/Manage Queries** (Displays a new window of all saved queries, and allows deletion or changes to be made)
- **Bookmarks** (Displays a window of all the saved preventive maintenance records as bookmarks)

6.1.2.1 More Search Fields buttons

This section will talk about the buttons on the bottom of the More Search Fields window.



6.1.2.1.1 Find

Find will execute the query with the current field criteria in the More Search Fields window.

6.1.2.1.2 Restore Application Defaults

This button will return all fields to the default values. Currently the University does not have any default values for this application.

6.1.2.1.3 Revise

The Revise button has four options.

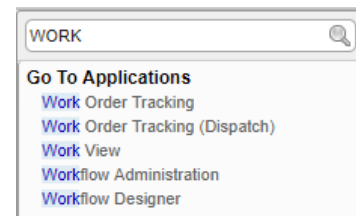
- **Clear Query and Fields** – This option removes the current query and clears all the fields.
- **Clear All Fields** - This option retains the current query but clears all fields. Clear All Fields has the same effect as the Restore Application Defaults button if there is no default query specified for the application
- **Change Query** - This option opens a new dialog box which has the same contents as the View/Manage Queries window in that application. You can select a query against which the More Search Fields parameters are applied.
- **Restore Default Query** - This option restores your personal default query but does not affect any fields.

6.1.2.1.4 Cancel

This will cancel any search that is queued to run and close the More Search Fields window.

6.1.3 Find Navigation Item

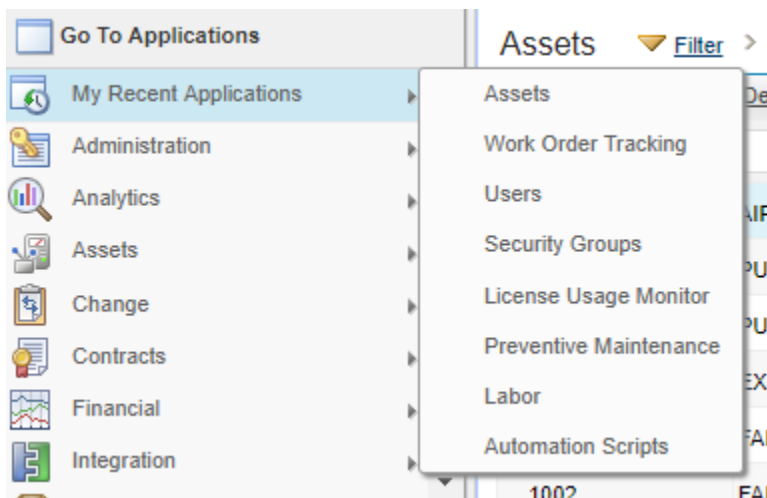
From this search box, you can start typing in the name of an application to quickly find another application. Such as “WORK” work order tracking.



for

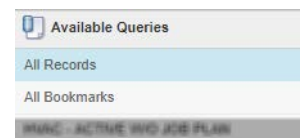
6.1.4 Go To Applications

This section is minimized by default. Includes the normal Go To menu and My Recent Applications which keeps a list of recently used applications in case you want to quickly switch back to a recent one.



6.1.5 Available Queries

Any saved queries, as well as options to show all records in the result set list window, and to show all bookmarks. At the bottom of the Available Queries, there is an option to View More Queries if the user has more

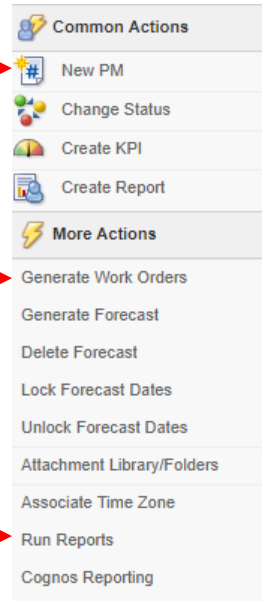


queries that can be displayed in the window. If selected, a pop-up window will show all the queries the user has.

6.1.6 Select Action Menu

The Select Action menu, on the left by default, contains different actions you can take depending on the tab of the asset record. On the PM list screen, the options are very limited. Those that pertain to University of Delaware’s usage of Maximo include:

- **New PM** – Allows the creation of a new PM
- **Generate Work Order** – Generate work orders from the selected PMs²
- **Run Reports** - Use this to access the report menu for PMs.



6.1.7 Icons

The following icons are available on the Work Order List tab

1. New Asset Record
2. Save Changes
3. Clear Changes
4. Previous Record
5. Next Record



6.1.8 Advances Search Drop Down menu

This menu allows for searching using multiple fields, a SQL where clause, and finally an attribute search.

6.1.8.1 More Search Fields

When opened, the More Search Fields window contains many more fields that can be used to filter and limit the results in the list screen.

6.1.8.2 Where Clause

The Where Clause allows advanced users to use SQL language to tailor the query to get the results they want.



² When a PM is due, a work order is generated from the PM record. The PM number is referenced on the work order.

6.1.8.3 Attribute Search

This allows a user to search by specific attributes but is not set up to be used at this time by the University of Delaware.

6.1.8.4 View Search Tips

This opens the help page to show various searching tips.

6.1.9 Save Query Drop Down menu

The Save Query Drop Down window allows the user to save a current query or view and manage the queries that are available to them.

6.1.9.1 Save Current Query

This is how a user can save a currently displayed query. A query can be saved at a private, public or default query. The University of Delaware does not use public queries. A default query would be a query that runs automatically when the PM application is loaded.

6.1.9.2 View/Manage Queries

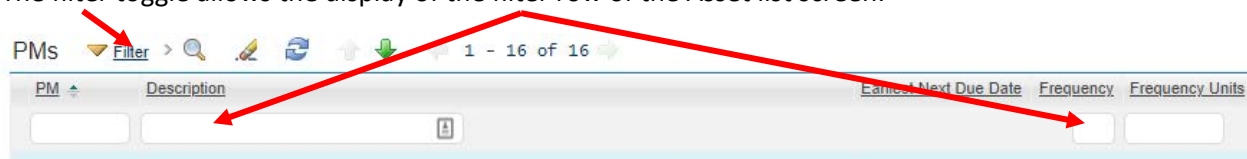
With this option, a user can view all the queries in their profile, including the where clause that makes up that query. Also allows the deletion of the query.

6.1.10 Bookmarks

Just like in a web browser, certain PM records can be bookmarked to come back to later if needed.

6.1.11 Filter Toggle

The filter toggle allows the display of the filter row of the Asset list screen.



6.1.12 Filter Search

Allows quick filter search of the current result set. An example would be searching for PMs that have a frequency in Months in the Frequency Units field.

PM #	Description	Earliest Next Due Date	Frequency	Frequency Units	Location
40261Z	EXCHANGE EXHAUST FILTERS (AHU 2) - MCKINLY LAB	3/1/19	6 MONTHS	MONTHS	
40222Z	PREP HVAC EQUIPMENT FOR HEATING/COOLING SEASON - WARRINGTON HALL A	2/1/19	6 MONTHS		NE31-00-0000
40210Z	PM BOGE AIR COMPRESSOR (SERVICE CONTRACT) - CENTRAL UTILITY PLANT	3/1/19	3 MONTHS		
40233Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - GEORGE READ HALL NORTH (HOUSING)	2/1/19	3 MONTHS		NP46-00-0000
40234Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - GEORGE READ HALL SOUTH (HOUSING)	2/1/19	3 MONTHS		NP46-00-0000
40234Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - THOMAS WICKREAN HALL	2/1/19	3 MONTHS		NP46-00-0000
40234Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS AND CHANGE AS REQUIRED - JAMES SMITH HALL	2/1/19	3 MONTHS		NP50-00-0000
40243Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - INDEPENDENCE HALL EAST (HOUSING)	2/1/19	3 MONTHS		NP41-00-0000
40243Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - INDEPENDENCE HALL WEST (HOUSING)	2/1/19	3 MONTHS		NP41-00-0000
300516	ANNUAL PM - AUTOMATIC AIR VENTS - ISEBURNER LAB	4/1/19	6 MONTHS		NE37-00-0000
304673	PM LAB WATER TREATMENT SYSTEM (EVODUX) REVERSE OSMOSIS - MCKINLY LAB	6/1/19	6 MONTHS		

6.1.13 Refresh

When a PM record is changed in some way in a result set, it is represented in a blue italicized font on the list screen like in the example below, but the updated information is not shown.

PM #	Description	Earliest Next Due Date	Frequency	Frequency Units	Location
<i>40261Z</i>	<i>EXCHANGE EXHAUST FILTERS (AHU 2) - MCKINLY LAB</i>	3/1/19	6 MONTHS	MONTHS	
40222Z	PREP HVAC EQUIPMENT FOR HEATING/COOLING SEASON - WARRINGTON HALL A	2/1/19	6 MONTHS		NE31-00-0000
40210Z	PM BOGE AIR COMPRESSOR (SERVICE CONTRACT) - CENTRAL UTILITY PLANT	3/1/19	3 MONTHS		
40233Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - GEORGE READ HALL NORTH (HOUSING)	2/1/19	3 MONTHS		NP46-00-0000
40234Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - GEORGE READ HALL SOUTH (HOUSING)	2/1/19	3 MONTHS		NP46-00-0000
40234Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - THOMAS WICKREAN HALL	2/1/19	3 MONTHS		NP46-00-0000
40234Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS AND CHANGE AS REQUIRED - JAMES SMITH HALL	2/1/19	3 MONTHS		NP50-00-0000
40243Z	CHANGE ALL HEAT EXCHANGER SEAL FILTERS - INDEPENDENCE HALL EAST (HOUSING)	2/1/19	3 MONTHS		NP41-00-0000

6.1.13.1 Result Set Numbers

The result set numbers will show how many PM records that are currently displayed, and how many in total are in the result set. In the example to the right, work orders 1-20 are currently displayed, and there is a total of 2,707 PMs are in the result set total.



6.1.14 Download

On the far right of the PM list screen there is a download link. That allows the user to download the current result set to Excel for further investigation of the result set.

6.2 Preventive Maintenance Tab

This tab is where the main information about the PM is located. This section is split into five columns.

6.2.1 General Information

This section contains most of the general information for a PM including PM number, type and site.

PM:	400086	EMERGENCY BATTERY PACK CHECKS - 186 S COLLEGE	Site:	UDEL	Status:	ACTIVE
Master PM:			Override Updates from Master PM?	<input type="checkbox"/>	Attachments	
			Forecast Dates Locked?	<input type="checkbox"/>	Forecast Exists?	<input type="checkbox"/>

6.2.1.1 PM Number

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.2.1.2 PM Short Description

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.2.1.3 PM Long Description

Includes all information that is relevant to the current PM and doesn't have a space in another part of the PM record.

6.2.1.4 Master PM Number

A master PM would be a parent to the current PM. The Master PM Number would be the number of that parent PM.

6.2.1.5 Master PM Short Description

Describes the Master PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.2.1.6 Master PM Long Description

Includes all information that is relevant to the Master PM and doesn't have a space in another part of the PM application.

6.2.1.7 Site

Shows the site where the PM is located. The University functions under one site, UDEL.

6.2.1.8 [Override Updates from Master PM](#)

Specifies whether changes to the Master PM will update this PM. If the checkbox is selected, changes to the Master PM will not affect this PM. If the checkbox is cleared, changes to the master PM will roll down to this PM whenever the Update Associated PMs action is performed

6.2.1.9 [Forecast Dates Locked](#)

Indicates if New Dates can be modified or added to the forecast. If the check box is selected, no New Dates can be added or modified. To modify or add New Dates, select Unlock Forecast Dates from the Select Action menu. **NOTE*** University of Delaware uses Akwire Scheduling instead of Maximo for forecasting.

6.2.1.10 [Status](#)

Indicates the status of the PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.2.1.11 [Attachments](#)

Any supplemental information that can't be contained in the long description can be attached to the work order. This can include pictures, PDF documents, and web pages. Specific UD examples would involve floor plans, manufacturer's manuals, and pictures of the asset if one was attached to the PM.

The following file types can be attached to a PM.

- PDF – Portable Document Format
- XLS – Excel file format (spreadsheet)
- CSV – Comma Separated Values
- TXT – Text file
- DOC – Word file format
- GIF – Graphics Interchange Format (picture)
- JPG – Picture file
- PPT – PowerPoint file format

6.2.1.12 [Forecast Exists](#)

Indicates if this PM has forecasted dates. Forecasts are generated by choosing Generate Forecast from the Select Action menu or by using the PM Forecast Cron task. This field is read only.

6.2.2 [Details](#)

This section contains more detailed information such as the location, asset, and route.

Location:	<input type="text" value="NW32-99-0000"/>	»	<input type="text" value="186 S COLLEGE"/>	Lead Time (Days):	<input type="text" value="30"/>	Counter:	<input type="text" value="105"/>
Asset:	<input type="text"/>	»	<input type="text"/>	Lead Time Active?	<input checked="" type="checkbox"/>	Use Job Plan Sequences?	<input type="checkbox"/>
Route:	<input type="text"/>	»	<input type="text"/>	Include this PM in the Forecast?	<input checked="" type="checkbox"/>	Has Children?	<input type="checkbox"/>

6.2.2.1 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the PM work will take place. May be blank if PM has an asset or route tied to the PM.

6.2.2.2 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

6.2.2.3 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

6.2.2.4 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

6.2.2.5 Route Number

Identifies the route associated with the PM. A route is a list of stops that represent asset or work locations. When you generate work orders from a PM with an associated route, you create a parent work order for the asset shown in the Asset or Location field or for the GL account, and a child work order for each asset listed on the route.

6.2.2.6 Route Description

The description of the route.

6.2.2.7 Lead Time (Days)

The number of days in advance of the Next Due Date that Maximo generates work orders from this PM (Default value for University PMs is 60 days). The target start date for the work order will still be the Next Due Date. You must select the Lead Time Active checkbox before you can enter or edit data in this field.

6.2.2.8 Lead Time Active

Specifies whether you want to apply lead time when generating work orders from this PM. If the checkbox is selected (the default), Maximo generates work orders several days in advance of the Next Due Date. The number of days is defined in the Lead Time Days field. If the checkbox is cleared, no lead time is applied to the Next Due Date.

6.2.2.9 Include this PM in the Forecast

Indicates if this PM should be included in the forecast

6.2.2.10 Counter

Number of work orders generated from the PM since the First Start Date. The counter is set to zero when you insert a new PM record, and increases each time you generate a top-level work order from the PM. If you are using a job plan sequence, the job plan is selected after the counter increments.

6.2.2.11 Use Job Plan Sequences

Specifies whether the PM uses job plan sequences. If the check box is selected, the PM generates different work orders each time based on a job plan sequence. If the checkbox is cleared, the PM generates identical work orders every time.

6.2.2.12 Has Children

Specifies whether the PM has any child PMs. If the check box is selected, the PM has child PMs associated with it. If the checkbox is cleared, the PM has no child PMs.

6.2.3 Work Order Information

Controls various information on how the work order will be created.

Job Plan:	Description:
EM BATTERY	EMERGENCY BATTERY PACK/LIGHTING CHECK
Work Type:	Last Start Date:
PM	12/10/18
* Work Order Status:	Last Completion Date:
WSCH	11/12/18
Priority:	Earliest Next Due Date:
	1/10/19
Interruptible?	Compliance_xf:
<input type="checkbox"/>	NOVI
	Start Constraint Offset:
	Finish Constraint Offset:

6.2.3.1 Job Plan Code

A job plan is a detailed description of the work that is to be performed step by step. This is an automatically generated value with the prefix JP which designates it as a Job Plan.

6.2.3.2 Job Plan Description

The description of the job plan. Current naming is:

- Type of asset on the route

- Location
- Job needed.

An example would be HVAC ASSETS – LANE HALL – RA APARTMENT

6.2.3.3 Work Type

What work type the work orders generated from the PM will be.

6.2.3.4 Work Order Status

Indicates what the initial status of the work order will be. Currently only WSCH (Waiting for Scheduling) is used.

6.2.3.5 Priority

What the priority of the work order will be initially. Values range between 1 and 5 (5 being the highest priority). The default value for a PM is a 2.

6.2.3.6 Interruptible

Specifies if the work order created from this PM can be stopped and restarted during resource scheduling. If the checkbox is selected, the work order can be stopped and restarted. If the checkbox is cleared, the work order cannot be interrupted for resource scheduling.

6.2.3.7 Last Start Date

Date on which the last work order generated from the PM was targeted to start. The frequency count between time-based PM work orders starts with either this date or the last completion date. When you do not use frequency criteria while generating work orders, the last start date is set to the system date if the PM is not due.

6.2.3.8 Last Completion Date

Latest completion date of any work order that is generated from this PM. This field is automatically updated when a PM work order is completed or closed.

6.2.3.9 Earliest Next Due Date

Earliest next due date for a work order generated from this PM.

6.2.3.10 Compliance

Signifiers for various compliance protocols, such as local, state, federal, and University guidelines. See [Appendix 4](#) for more details.

6.2.3.11 Start Constraint Offset

The amount of time (in hours) to be subtracted from the Target Start date to calculate the Start No Earlier Than date of the work record.

6.2.3.12 Finish Constraint Offset

The amount of time (in hours) to be added to the Target Finish date to calculate the Finish No Later Than date of the work record.

6.2.4 Responsibility

This section dictates owner responsibilities of the generated work orders such as supervisor, lead and owner group.

6.2.4.1 Supervisor

Supervisor responsible for implementing the work order. Maximo copies this field from either a single job plan on the PM, or from the first job plan in a job plan sequence. If you change the job plan associated with the PM, you must update this field manually.

6.2.4.2 Crew

Identifies the crew that is assigned to the PM.

6.2.4.3 Lead

Mechanic that is responsible for performing the work of the work order.

6.2.4.4 Work Group

Identifies the Person Group for the supervisor. The University uses Owner Group instead.

6.2.4.5 Owner

The person who will be responsible for the work order generated from this PM.

6.2.4.6 Owner Group

The person group who will be responsible for the work order generated from this PM.

6.2.4.7 Crew Work Group

Identifies the resource pool to which the labor belongs.

Supervisor:	M_GUNS	>>
Crew:		>>
Lead:	K_DAVIS	>>
Work Group:		>>
Owner:		>>
Owner Group:	EL	>>
Crew Work Group:		>>

6.2.5 Resource Information

Displays GL account, storeroom and other information.

GL Account:	AGCY912271	Use this PM to Trigger PM Hierarchy?	<input checked="" type="checkbox"/>
Storeroom:		Child Work Orders and Tasks Will Inherit Status Changes?	<input checked="" type="checkbox"/>
Storeroom Site:	UDEL		

6.2.5.1 GL Account

General ledger account code to which the PM costs are charged. The GL (General Ledger) account consists of up to three components: purpose code (sometimes incorrectly referred to as speed type), account, and user defined, each separated by a period. Only the purpose code is entered in Maximo. Other components are indicated by ten question marks (??????????).

6.2.5.2 Storeroom

The storeroom for materials on a PM with an associated job plan. If you leave this field blank, Maximo will populate this field with your default storeroom.

6.2.5.3 Storeroom Site

Specifies the site for the selected storeroom. The University functions under one site, UDEL.

6.2.5.4 Use this PM to trigger PM Hierarchy

Tells the Generate WO function that the frequency for a lower level PM should be checked when determining if all the PMs in the hierarchy should be generated

6.2.5.5 Child Work Orders and Tasks Will Inherit Status Changes

Specifies whether the child work order should change its status when the parent's status changes. If the check box is selected, the status of the child work orders will change. If the check box is cleared, the status of the child work orders will not change. This is checked by default.

6.3 Frequency Tab

Shows all the information to know how often a PM work order is ready to be generated.

6.3.1 General Information

Shows PM number, site, and status along with a few other fields.

PM:	EMERGENCY BATTERY PACK CHECKS - 186 S COLLEGE	Site:	UDEL	Status:	ACTIVE
400086				Forecast Exists?	<input type="checkbox"/>

6.3.1.1 PM Number

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.3.1.2 PM Short Description

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.3.1.3 Site

Shows the site where the PM is located. The University functions under one site, UDEL.

6.3.1.4 Status

Indicates the status of the PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.3.1.5 Forecast Exists

Indicates if this PM has forecasted dates. Forecasts are generated by choosing Generate Forecast from the Select Action menu or by using the PM Forecast Cron task. This field is read only.

6.3.2 Work Order Generation Information

Displays some information about options about when to determine the next occurrence of the PM.

Work Order Generation Information

Use Last Work Order's Start Date to Calculate Next Due Date?	Generate Work Order Based on Meter Readings (Do Not Estimate)?
<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Generate Work Order When Meter Frequency is Reached?
	<input type="checkbox"/>

6.3.2.1 Use Last Work Order's Start Date to Calculate Next Due Date

Select this check box if you want to use the target start date of the last PM work order to calculate the due date of the next PM work order. Clear this check box if you want to use the completion date of the last PM work order to calculate the next due date. This is checked by default and used exclusively by the University.

6.3.2.2 Generate Work Order Based on Meter Readings (Do Not Estimate)?

Only use actual meter readings when determining if the PM is ready to be generated.

6.3.2.3 Generate Work Order When Meter Frequency is Reached

Flag that indicates to generate work orders automatically from a PM when meter frequency is reached.

6.3.3 Time Based Frequency Sub Tab

If the PM generation is based on a time-based schedule, the information to determine the generation is listed here.

Time Based Frequency		Meter Based Frequency	
* Frequency:	Alert Lead (Days):	Extended Date:	Target Start Time:
<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>
* Frequency Units:	Estimated Next Due Date:	Adjust Next Due Date?	
<input type="text" value="MONTHS"/>	<input type="text" value="1/10/19"/>	<input type="checkbox"/>	

6.3.3.1 Frequency

Numeric value of how many of the frequency units are used to space out the PM generation.

6.3.3.2 Frequency Units

The unit of time for PM generation.

- Days
- Weeks

- Months
- Years

6.3.3.3 Alert Lead (Days)

Acceptable period (in days), prior to the PM due date, during which the PM may be performed.

6.3.3.4 Estimated Next Due Date

If you selected the Use Last Work Order's Start Information to Calculate Next Due Date check box, it is the date that is calculated by adding the frequency value to the target start date of the last work order. If you did not select that check box, it is calculated by adding the frequency value to the completion date of the last work order.

6.3.3.5 Extended Date

A date that can be used to override the Next Due Date.

6.3.3.6 Adjust Next Due Date

Allows adjusting the next due date after generation.

6.3.3.7 Target Start Date

The target time for starting the PM work order.

6.3.4 Meter Based Frequency Sub Tab

If the PM is based on a meter instead of a time-based schedule, the information about the frequency will be contained here.

The screenshot displays the 'Meter Based Frequency' sub-tab. At the top, there are two tabs: 'Time Based Frequency' and 'Meter Based Frequency'. Below the tabs is a table with the following columns: Meter, Description, Frequency, Units to Go, Generate WO Ahead By, and Alert Lead. The first row is expanded, showing 'RUNHOURS' as the meter and 'Run Hours' as the description. The frequency is 300.00 and units to go is 298.00. Below the table is a 'Details' section with the following fields: Meter (RUNHOURS), Frequency (300.00), Alert Lead, and Generate WO Ahead By. There are also sections for 'Last Work Order Information' and 'Next Work Order Projections' showing meter readings and due dates.

Meter	Description	Frequency	Units to Go	Generate WO Ahead By	Alert Lead
RUNHOURS	Run Hours	300.00	298.00		

Details

Meter: RUNHOURS
 Frequency: 300.00
 Alert Lead:
 Generate WO Ahead By:

Last Work Order Information

Meter Reading: 12.00
 Meter Reading Date: 12/1/18 12:00 AM

Next Work Order Projections

Next Meter Reading: 312.00
 Units to Go: 298.00
 Estimated Next Due Date:

6.3.4.1 List

The list portion of the meter-based frequency section shows a brief listing of values for each meter for the PM. Clicking on the arrow head will expand the row to reveal the details section.

6.3.4.2 Details

Contains more information about each meter.

6.3.4.2.1 Meter Code

Identifier for the meter attached to the asset.

6.3.4.2.2 Meter Description

The description of the meter.

6.3.4.2.3 Frequency

The frequency of the PM interval in units.

6.3.4.2.4 Alert Lead

Like the Alert Lead (Days), this will alert the lead based on a specified number of units.

6.3.4.2.5 Generate WO Ahead By

Determines if a work order should be generated so many units before the actual interval.

6.3.4.2.6 Average Units/Day

Shows the average units per day from either the asset meter or location meter.

6.3.4.2.7 Rollover

Point at which the asset's (or) Location's meter returns to the minimum value. Rollover applies to CONTINUOUS meters only.

6.3.4.3 Last Work Order Information

The meter information from the last work order.

6.3.4.3.1 Meter Reading

Meter reading at the last work order generation.

6.3.4.3.2 Meter Reading Date

Date when the last work order meter reading was taken.

6.3.4.4 Next Work Order Projections

Estimates the meter information based on average units/day value and current reading.

6.3.4.4.1 Next Meter Reading

The reading when the next work order is projected to be generated. The PM is generated based on the value for the Life To Date field that is displayed on the Meters tab in the Assets application.

6.3.4.4.2 Units to Go

How many units are left before the next PM is generated.

6.3.4.4.3 Estimated Next Due Date

If you selected the Use Last Work Order's Start Information to Calculate Next Due Date check box, it is the date that is calculated by adding the frequency value to the meter reading that was obtained on the target start date of the last work order. If you did not

select that check box, it is calculated by adding the frequency value that was obtained on the completion date of the last work order.

6.4 Seasonal Dates Tab

Some PMs are only valid to be generated at certain parts of the year. For example, athletic field maintenance only needs to be done monthly between March and December. This tab allows for those kind of restrictions.

6.4.1 General Information

Shows PM number, site, and status along with a few other fields.

PM:	<input type="text" value="500253"/>	<input type="text" value="SURFACE BRUSHING OF ARTIFICIAL FIELDS - FRAZIER"/>	Site:	<input type="text" value="UDEL"/>	Status:	<input type="text" value="ACTIVE"/>
					Forecast Exists?	<input type="checkbox"/>

6.4.1.1 PM Number

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.4.1.2 PM Short Description

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.4.1.3 Site

Shows the site where the PM is located. The University functions under one site, UDEL.

6.4.1.4 Status

Indicates the status of the PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.4.1.5 Forecast Exists

Indicates if this PM has forecasted dates. Forecasts are generated by choosing Generate Forecast from the Select Action menu or by using the PM Forecast Cron task. This field is read only.

6.4.2 Active Days

This section allows the selection of certain days of the week for the PM to generate.

Active Days

Sunday? Monday? Tuesday? Wednesday? Thursday? Friday? Saturday?

Schedule Early on Frequency Conflict?

6.4.2.1 Days of Week

Each day of the week is available to be selected or not.


6.4.2.2 Schedule Early on Frequency Conflict

Check box determines how conflicts between the PM frequency and the day of the week are resolved. If the check box is selected, then the PM work order is conservatively assigned a Target Start on a selected day of the week that is earlier or the same as the normal frequency-based schedule date. If the check box is cleared, the PM work order will only be assigned a Target Start on a selected day of the week that is the same as or later than the normal frequency-based schedule date.

6.4.3 Active Time

Section that can be used to set the target start time for the work order generated from the PM. University has designated a default time of 7:00 AM.

Active Time








Target Start Time:
 

6.4.3.1 Target Start Time

This field is used to specify the target start time for any work orders generated from the PM.

6.4.4 Active Dates

This is the section to specify a time frame for when the PM is active during the calendar year.

Active Dates      1 - 1 of 1  

Start Month	Start Day	End Month	End Day
MARCH	15	DECEMBER	18

Details

Start Month: MARCH End Month: DECEMBER
Start Day: 15 End Day: 18

6.4.4.1 List

The list portion shows all the time frames that the PM is active during the year and shows a brief listing of values for time frame for the PM. Clicking on the arrow head will expand the row to reveal the details section.

6.4.4.2 Details

Contains more information about each time frame.

6.4.4.2.1 Start Month

Identifies the start month of the current active time frame.

6.4.4.2.2 Start Day

Identifies the day of the month when the PM becomes active. The PM remains active until the end month and day is reached.

6.4.4.2.3 End Month

Identifies the end month of the current active time frame.

6.4.4.2.4 End Day

Identifies the day of the month when the PM becomes inactive. The PM becomes inactive when the end month and day is reached.

6.4.4.3 New Row

Allows the addition of more time frames to be added to the seasonal frequency.

6.5 Job Plan Sequence Tab

A PM can have job plan that addresses different time frames. Some steps are for the monthly, others are for the yearly, and more then every forty eight months.

6.5.1 General Information

Shows PM number, site, and status along with a few other fields.

PM:	<input type="text" value="1012"/>	<input type="text" value="Breaker maintenance"/>	Site:	<input type="text" value="BEDFORD"/>	Status:	<input type="text" value="DRAFT"/>
					Forecast Exists?	<input type="checkbox"/>
Location:	<input type="text"/>	» <input type="text"/>	Storeroom:	<input type="text"/>	»	
Asset:	<input type="text" value="BREAKER100"/>	» <input type="text" value="Substation Breaker 1001 Gulfstream"/>	Storeroom Site:	<input type="text" value="BEDFORD"/>	<input type="text"/>	
Job Plan:	<input type="text" value="BREAKINSP"/>	» <input type="text" value="Breaker Inspection"/>				

6.5.1.1 PM Number

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.5.1.2 PM Short Description

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable

- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.5.1.3 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the PM work will take place. May be blank if PM has an asset or route tied to the PM.

6.5.1.4 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

6.5.1.5 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

6.5.1.6 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

6.5.1.7 Job Plan Code

A job plan is a detailed description of the work this is to be performed step by step. This is the unique identifier of the job plan.

6.5.1.8 Job Plan Description

The description of the job plan. Current naming is:

- Type of asset on the route
- Location
- Job needed.

An example would be HVAC ASSETS – LANE HALL – RA APARTMENT

6.5.1.9 Site

Shows the site where the PM is located. The University functions under one site, UDEL.

6.5.1.10 Storeroom

The storeroom for materials on a PM with an associated job plan. If you leave this field blank, Maximo will populate this field with your default storeroom.

6.5.1.11 Storeroom Site

Specifies the site for the selected storeroom. The University functions under one site, UDEL.

6.5.1.12 Status

Indicates the status of the PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.5.1.13 Forecast Exists

Indicates if this PM has forecasted dates. Forecasts are generated by choosing Generate Forecast from the Select Action menu or by using the PM Forecast Cron task. This field is read only.

6.5.2 Job Plan Sequence

This section shows the sequence of the job plans

Job Plan Sequence Filter 1 - 3 of 3

Job Plan	Description	Sequence
<input type="checkbox"/> BREAKINSP >>	Breaker Inspection	<input type="text" value="1"/>
<input type="checkbox"/> BREAKOP >>	Operate Breaker	12
<input type="checkbox"/> BREAKOVEF >>	Overhaul Breaker	48

Details

Job Plan: >>

Sequence:

6.5.2.1 List

The list portion shows all the job plans that are applied to the PM. Clicking on the arrow head will expand the row to reveal the details section.

6.5.2.2 Details

Contains more information about each job plan.

6.5.2.2.1 Job Plan Code

A job plan is a detailed description of the work this is to be performed step by step. This is the unique identifier of the job plan.

6.5.2.2.2 Job Plan Description

The description of the job plan. Current naming is:

- Type of asset on the route

- Location
- Job needed.

An example would be HVAC ASSETS – LANE HALL – RA APARTMENT

6.5.2.2.3 Sequence

Indicates the interval that the job plan is used.

6.5.2.3 New Row

Allows more job plans to be added to the sequence.

6.6 PM Hierarchy Tab

This tab shows the parent and child PMs of the selected PM.

6.6.1 General Information

Shows PM number, site, and status along with a few other fields.

PM:	<input type="text" value="PM6758"/>	<input type="text" value="Maintenance of WINS and DHCP Server"/>	Site:	<input type="text" value="BEDFORD"/>	Status:	<input type="text" value="ACTIVE"/>
Parent:	<input type="text" value="1008"/>	<input type="text" value="Calibration 101"/>			Forecast Exists?	<input type="checkbox"/>

6.6.1.1 PM Number

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.6.1.2 PM Short Description

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.6.1.3 Parent PM Number

This is a unique number that identifies the parent PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.6.1.4 Parent PM Short Description

Describes the parent PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.6.1.5 Site

Shows the site where the PM is located. The University functions under one site, UDEL.

6.6.1.6 Status

Indicates the status of the PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.6.1.7 Forecast Exists

Indicates if this PM has forecasted dates. Forecasts are generated by choosing Generate Forecast from the Select Action menu or by using the PM Forecast Cron task. This field is read only.

6.6.2 Children

This section displays all the children PM for the current PM.

Children [Filter](#) > 1 - 2 of 2

Sequence	PM	Description	Asset	Location	Status
10	1015	Breaker maintenance	BREAKER10		DRAFT
20	1011	Calibration 103	CAL103		ACTIVE

Details

Sequence: Status:

PM: >>

Asset: >>

Location: >>

[New Row](#)

6.6.2.1 List

The list portion shows all the PMs that are children to the PM. Clicking on the arrow head will expand the row to reveal the details section.

6.6.2.2 Details

Contains more information about each child PM.

6.6.2.2.1 Sequence

Sequence number of the child PM. This field is copied over to the work order sequence field.

6.6.2.2.2 PM Number

This is a unique number that identifies the child PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.6.2.2.3 PM Description

Describes the child PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location
- An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.6.2.2.4 Asset Number

This is a unique number that identifies an asset. It is generated automatically by Maximo.

6.6.2.2.5 Asset Short Description

Describes the Asset. Current naming is:

- What is the asset
- What is the print label
- Where is it located.

An example would be FAN COIL UNIT – FCU ROOM 304 SYPHERD HALL

6.6.2.2.6 Location Code

The location code is the official value of any location at the University. The location code is formed by the UD-issued building code, floor number, and room number. For example, NW22-02-0201 is the building code for Trabant University Center (NW22), second floor (NW22-02), room 201 (NW22-02-0201.) This is where the PM work will take place. May be blank if PM has an asset or route tied to the PM.

6.6.2.2.7 Location Description

This is the commonly known name of the location. For example, building code NE01 is commonly known as Perkins Student Center.

6.6.2.2.8 Status

Indicates the status of the child PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.6.3 New Row

Allows more PMs to be added to the children section.

6.7 Forecast Tab

A user can generate a PM forecast for either a single PM or multiple PMs. A forecast will take the frequency information (Time based, or Meter based) and estimate the next X occurrences based on the time frame set during the forecast generation set up. To generate a forecast, use the Generate Forecast option on the left menu under the More Actions section.

6.7.1 General Information

This section contains most of the general information for a PM including PM number, type and site.

PM: 1008 Calibration 101 Site: BEDFORD Status: ACTIVE
Forecast Dates Locked? Reforecast Subsequent Dates?

6.7.1.1 PM Number

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.7.1.2 PM Short Description

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location

An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.7.1.3 Site

Shows the site where the PM is located. The University functions under one site, UDEL.

6.7.1.4 Forecast Dates Locked

Indicates if New Dates can be modified or added to the forecast. If the check box is selected, no New Dates can be added or modified. To modify or add New Dates, select Unlock Forecast Dates from the Select Action menu.

6.7.1.5 Status

Indicates the status of the PM. There are three statuses.

- **Draft** – Used when creating a PM record. The PM is not ready to be used and will not generate work orders in this status.
- **Active** – Used when a PM is being used to generate work orders.
- **Inactive** – Indicates a PM that is no longer being used but can't be deleted due to being used at one time.

6.7.1.6 Reforecast Subsequent Dates

Indicates if subsequent dates for this PM should be adjusted because of the New Date entered. If you select this checkbox, the forecast dates following the adjusted date will be re-forecasted

automatically. If you clear this checkbox, subsequent PM dates in the forecast will remain unchanged. If a forecast exists for this PM, this field is read-only.

6.7.2 Forecast Details

This section contains all the estimated occurrences of the forecast.

Forecast Details [Filter](#) > 1 - 7 of 7

Forecast Date	Job Plan	New Date	Changed By	Changed Date	Remarks	Reforecast Pending?
▼ 12/4/18	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
▶ 12/18/18	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
▶ 1/1/19	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
▶ 1/15/19	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
▶ 1/29/19	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
▶ 2/12/19	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
▶ 2/26/19	JPCAL101	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Details

Forecast Date: <input type="text" value="12/4/18"/>	Changed By: <input type="text"/>
New Date: <input type="text"/>	Changed Date: <input type="text"/>
Job Plan: <input type="text" value="JPCAL101"/>	Reforecast Pending?: <input type="checkbox"/>
Remarks: <input type="text"/>	

6.7.2.1 List

The list portion shows all the occurrences that the PM would generate in the forecast during the date range selected in the Forecast Generation process. Clicking on the arrow head will expand the row to reveal the details section.

6.7.2.2 Details

Contains more information about each estimated occurrence.

6.7.2.2.1 Forecast Date

Date of the estimated occurrence.

6.7.2.2.2 New Date

Allows the manual adjustment of the future occurrence.

6.7.2.2.3 Job Plan Code

A job plan is a detailed description of the work this is to be performed step by step. This is the unique identifier of the job plan.

6.7.2.2.4 Remarks

Notes or comments relating to this PM forecast date.

6.7.2.2.5 Changed By

Who changed the forecast.

6.7.2.2.6 [Changed Date](#)

When the forecast was changed.

6.7.2.2.7 [Reforecast Pending](#)

Indicates if the Forecast Date within the forecast has an adjustment pending. If the field is checked, a New Date has been entered for a Forecast Date, the Reforecast Subsequent Dates field is set to yes, and the reforecasting of subsequent Forecast dates will occur based on the frequency of the forecast Cron task. This field is read-only.

6.7.3 [Process Pending Reforecast](#)

If there is a pending re-forecast pending due to a manual change in the New Date field, clicking this button will recalculate the forecast with the new dates in mind.

6.8 [Forecast Cost Tab](#)

This tab will take the generated forecast and calculate the associated costs for each occurrence based on the resources assigned from the job plan on the PM.

6.8.1 [General Information](#)

This section contains most of the general information for a PM including PM number and site

PM:	<input type="text" value="1008"/>	<input type="text" value="Calibration 101"/>	Site:	<input type="text" value="BEDFORD"/>
Last Calculated Date:	<input type="text" value="12/5/18 9:09 AM"/>	Grand Total Cost:	<input type="text" value="3,330.00"/>	<input type="button" value="Calculate Cost"/>

6.8.1.1 [PM Number](#)

This is a unique number that identifies a PM. It is now generated automatically by Maximo. There was a time when this was entered manually meaning not all PMs are strictly numbers.

6.8.1.2 [PM Short Description](#)

Describes the PM. Current naming is:

- Work Description
- Label of Equipment if applicable
- Location

An example would be FUNCTIONALLY CHECK PRESSURE REDUCING VALVE (PRV-1) – PENNY HALL

6.8.1.3 [Last Calculated Date](#)

The date and time when the PM forecast cost was last calculated.

6.8.1.4 [Site](#)

Shows the site where the PM is located. The University functions under one site, UDEL.

6.8.1.5 [Grand Total Cost](#)

The total cost of the entire forecast for the PM.

6.8.1.6 Calculate Cost Button

Used to calculate the cost of the PM. Uses the number of occurrences and the costs based on the job plan for the PM.

6.8.2 Forecast Details

Breaks down the various costs for each occurrence of the forecast.

Forecast Details [Filter](#) > 1 - 9 of 9

Forecast Date	Job Plan	Nested Job Plan?	Route	Route Stop	Total Labor Hours	Total Labor Cost	Total Material Cost	Total Tool Cost	Total Service Cost	Total Cost
12/5/18	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
12/19/18	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
1/2/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
1/16/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
1/30/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
2/13/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
2/27/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
3/13/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00
3/27/19	316433	<input type="checkbox"/>			4.00	104.00	196.00	70.00	0.00	370.00

6.8.2.1 List

A listing of all the occurrences of the forecast for the PM.

6.8.2.1.1 Forecast Date

Date of the estimated occurrence.

6.8.2.1.2 Job Plan

A job plan is a detailed description of the work this is to be performed step by step. This is the unique identifier of the job plan.

6.8.2.1.3 Nested Job Plan

Allows the structure of parent-child job plans. If a job plan is a nested job plan, this checkbox will be checked.

6.8.2.1.4 Route Number

Identifies the route associated with the PM. A route is a list of stops that represent asset or work locations. When you generate work orders from a PM with an associated route, you create a parent work order for the asset shown in the Asset or Location field or for the GL account, and a child work order for each asset listed on the route.

6.8.2.1.5 Route Stop

Each record in a route is considered a stop and numbered in sequence. This sequence number will be displayed here if there is one.

6.8.2.1.6 Total Labor Hours

Displays the total hours for the job plan associated with the PM.

6.8.2.1.7 Total Labor Cost

Shows the total cost of labor based on the total labor hours and rate for the labor.

6.8.2.1.8 Total Material Cost

Shows the total cost of materials based on the unit cost and quantity needed for the job.

6.8.2.1.9 Total Tool Cost

Shows the total cost of the tools needed based on the unit cost and quantity for the job.

6.8.2.1.10 Total Service Cost

Shows the total cost of the services needed based on the unit cost and quantity for the job.

6.8.2.1.11 Total Cost

A grand total for all costs on an occurrence line.

6.8.3 LABOR Sub Tab

Breaks down the labor needed for the job plan.

The screenshot shows a software interface with four tabs: LABOR, MATERIAL, TOOL, and SERVICE. The LABOR tab is selected. Below the tabs is a navigation bar with a 'Filter' button and a status indicator '1 - 1 of 1'. Below the navigation bar is a table with the following data:

Crew Type	Craft	Skill Level	Labor	Rate	Labor Hours	Labor Cost
			BIRD	26.00	4.00	104.00

6.8.3.1 Crew Type

The type of crew needed to do fulfill the job plan.

6.8.3.2 Craft

The craft code that is associated with the mechanic assigned to the job plan.

6.8.3.3 Skill Level

The skill level tied to the craft of the mechanic.

6.8.3.4 Labor Code

The mechanic's labor code that is assigned to the job plan. Usually the labor code is the first initial, underscore, and last name.

6.8.3.5 Rate

The charge rate for the mechanic based on the craft and skill levels.

6.8.3.6 Labor Hours

How many hours is expected to be taken up by the job plan.

6.8.3.7 Labor Cost

Total labor cost of the labor line listed. Based on the rate, and quantity of hours.

6.8.4 MATERIAL Sub Tab

Breaks down the materials needed for the job plan.

LABOR			MATERIAL			TOOL			SERVICE		
Material											
Filter > [Icons] 1 - 1 of 1 [Icons]											
Item	Item Quantity	Material Cost									
134-6307	2.00	196.00									

6.8.4.1 Item Number

The number of the item from the storeroom.

6.8.4.2 Item Quantity

How many of the item is needed.

6.8.4.3 Material Cost

Total of the material cost by line. Based on the calculation of the unit price and quantity of the item.

6.8.5 TOOL Sub Tab

Breaks down the tools needed for the job plan.

LABOR			MATERIAL			TOOL			SERVICE		
Tool											
Filter > [Icons] 1 - 1 of 1 [Icons]											
Tool	Tool Quantity	Tool Hours	Rate	Tool Cost							
NIBBLER	1.00	2.00	35.00	70.00							

6.8.5.1 Tool Code

The code of the tool needed.

6.8.5.2 Tool Quantity

How many of the tool is needed.

6.8.5.3 Tool Hours

How many hours the tool is needed.

6.8.5.4 Rate

The rental rate of the tool.

6.8.5.5 Tool Cost

The total cost of the tool needed for the job. Based on the quantity, hours, and rate of the tool.

6.8.6 SERVICE Sub Tab

Breaks down the services needed for a job plan on the PM.

LABOR			MATERIAL			TOOL			SERVICE		
Service											
Filter > [Icons] 1 - 1 of 1 [Icons]											
Service Item	Quantity	Service Cost									
MECH	1.00	0.00									

6.8.6.1 Service Name

The name of the service needed.

6.8.6.2 Quantity

How many of the service is needed.

6.8.6.3 Service Cost

The total for the service line. Based on the quantity and rate.

APPENDICES

Appendix 1.0: Request

Title: Request Code Chart

File: Request Code Chart

Revised: 9/10/2020

Source: [https://udwinprod.sharepoint.com/sites/Team-](https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={ABA4F73D-033C-46A9-87B6-30FB123518F3})

[MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={ABA4F73D-033C-46A9-87B6-30FB123518F3}](https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={ABA4F73D-033C-46A9-87B6-30FB123518F3})

Request Code	Request Type	Examples
A	Academic	Locations that hold classrooms or hold faculty/staff that support the goal of education.
B	Laboratory	Locations that are considered research and hands on learning space.
M	Administration	Locations that support the administrative tasks of the University such as Hullihen Hall, Career Services or Student Services.
T	Athletics	Indoor and outdoor locations that provide a space for sports & athletics such as the Football Stadium, Fred Rust Ice Arena or BCC.
X	Auxiliary	Locations that provides a service such as Laurel Hall (student health) and Transportation Services (vehicle repair).
C	Conference	Locations such as Clayton that hold conferences.
D	Dining	Locations that prepare, cook & disperse food to the University community.
G	Grounds	Grounds locations – location often begins with “Newark Grounds”.
L	Leased	Leased buildings owned by the University.
P	Parking	Parking lots & structures such as UD owned lots, Perkins Garage & CFA Garage.
E	Rental	University owned rental properties.
R	Residential	Locations that house University students such as Harrington, Lane and Thomas Mckean.
U	Utility	Utility locations such as ECUP, Central Utility Plant & Laird Utility Plant.

Appendix 2.0: Location Owner

Title: Location Owner Chart

File: Location Owner Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={F2C3740F-8886-4598-9105-B0880F3D2A46}

Note: Location Owner is obsolete as of the upgrade to 7.6

Value	Description	Examples
NO WO	**NO WO**	No Work Orders should be created at this location
ALL	ALL	Any Owner Group can use this location for Work Orders.
CUSTODIAL	CUSTODIAL	Only Custodial Owner Groups can use this location for Work Orders.
GROUNDS	GROUNDS	Only Grounds Owner Groups can use this location for Work Orders.
HOUSING	HOUSING	Only Housing Owner Groups can use this location for Work Orders.
LEWES	LEWES	Only Lewes Owner Groups can use this location for Work Orders.
LOCK SHOP	LOCK SHOP	Only the Lock Owner Group can use this location for Work Orders.
O&M SHOPS	O&M SHOPS	Only M&O Owner Groups can use this location for Work Orders.
O&M SHOPS OR HOUSING	O&M SHOPS OR HOUSING	M&O or Housing Owner Groups can use this location for Work Orders
PEST	PEST	Only the Pest Owner Group can use this location for Work Orders.
PEST OR FPC	PEST OR FPC	Pest or FPC (PPD) Owner Groups can use this location for Work Orders.

Appendix 3.0: Work Type

Title: Work Type Chart

File: Work Type Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={6E532DFF-13CF-4043-B1D9-52E159249B95}

Status	Value	Description	Examples
Active	ADM	Administration	No wrench time, i.e. “perform interviews, purchase uniforms,” etc.
Active	CAPP	Capital Project >= \$100,000	Large equipment replacement, site demolition.
Active	CM	Corrective Maintenance	Routine work attributed to daily wear-and-tear (repair/replace minor items, follow-up work).
Active	ENG	Engineering	Evaluation of space in preparation for large-scale update or renovation.
Active	ES	Event Support	Mechanical support of event (generators, dumpster pick-up, turf prep).
Active	ESTM	Estimate	Obtain quote prior to performing work (“ESTIMATE: Renovate space”).
Active	NCAP	Non-Capital Project < \$100,000	System upgrades, space improvements.
Active	OC	Operational Check	Check equipment without anticipated wrench time (boiler checks, chiller checks, storm pump checks).
Active	PM	Preventive Maintenance	Regularly-scheduled work done to mitigate failure (clean fan coil units, change filters).
Active	RFS	Request for Service	Non-routine work not attributed to daily wear-and-tear (install keyboard tray, hang items).
Active	SC	Service Call	Emergent or immediate maintenance (alarms, leaks, clogs).
Active	STO	Stake-Out	Utility locate performed in advance of excavation.
Active	SWO	Standing Work Order	Work orders intended for repeated use over a period of time (supply restocking, cut bike locks).
Inactive	SWON	Standing WO Non-Routine	Work orders intended for use over a period of time for reimbursable, project, or other special purposes.
Inactive	SWOR	Standing WO Routine	Work orders intended for repeated use over a period of time (supply re-

			stocking, cut bike locks) Inactivated as of FY19.
Active	TRAIN	Training	Policy or procedural training (LOTO Training, Confined Space Training, etc).

Appendix 4.0: Compliance

Title: Compliance Chart

File: Compliance Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={0E94E754-CA3D-44D2-BF6D-65E7F88C473E}

Value	Description	Guidelines for usage
AIRP	Air Permitting	All work/evaluations associated with air permits such as boilers and any related inspection activities.
ANSI	American National Standards Institute	Work activity or evaluations under ANSI standard or accreditation such as creating, updating and testing for one a technical equipment standard.
ASME	ASME Code Requirement	All work/evaluations associated with ASME code such as relief valves and new or repaired line testing.
BFP	Back Flow Prevention Program	All testing & repairs and documentation associated with the BFP Program performed by the PL and ER shops.
CFR	Code of Federal Regulations	Government rules & regulations that oversee administrative law. Any work or reporting for areas such as energy, labor and communications can apply.
EHS	EHS Programs and Inspections	Any work requests from the EHS department that are not part of regulatory compliance programs such as MER cleanliness.
ELEV	Elevator Code	Work activities for elevator compliance and administration.
FMG	FM Global	Repairs, new construction or evaluation related to an FMG (Insurer) inspection finding or recommendations. Initial code input by the M&O coordinator.
NEC	National Electric Code	Work activities that fall under the NEC adopted by the local authority and may require submittal of documentation (LOTO under OSHA code).
NFPA	National Fire Protection Association	All fire protection work and reporting activities the fall under the NFPA jurisdiction and as determined by the state/local/EHS fire marshal.
NOVI	City, County, State Requisite	Work/Action requested by the City/County/State that does not involve a violation or citation. Request for inspections or information.
NPDE	National Pollutant Discharge & Elimination System	All work activities and reporting associated with storm sewer inspections and cleanup to begin in 2018.
OSHA	Occupational Safety & Health Administration	Compliance activities for personnel/industrial safety issues such as confined space, fall protection, Lock Out – Tag Out, used by EHS to track hazard calls, etc.
REFC	Refrigerant Compliance	Any work and reporting activities associated with refrigeration codes.

SPCC	Spill Prevention Control & Countermeasures	Any work and evaluations associated with spill prevention and containment facilities as directed by the EHS department.
UTIL	Utility Provider/Supplier	Work requested by a utility companies such as Delmarva or the City that is specific to the service, and is not part of a code non-compliance issue.
VIOL	City, County, State Citation	Any work associated with the evaluation and/or correction of an official citation sent to UD by the City of Newark.

Appendix 5.0: Status

Title: Status Chart

File: Status Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={F2FE773A-5D4D-4ACD-9F7E-83D9322E53F2}

Active	Value	Description	Definition	Maximo or UDel	Synonym	Can be Changed To**
Y	APPR	Approved	The work order is approved and the work can begin.	Maximo		<ul style="list-style-type: none"> INPRG WMATL COMP WPCOND CLOSED
Y	WPCOND	Waiting on Plan Conditions	The work can be performed only when the condition of the plant is suitable.	Maximo	APPR	<ul style="list-style-type: none"> INPRG WMATL COMP WPCOND CLOSED
Y	CAN*	Canceled	The work is canceled. You cannot cancel a work order if the work has already been initiated or if actuals have already been reported.	Maximo		No status change allowed
Y	CLOSE*	Closed	The work order is closed the work order is made into a history record.	Maximo		<ul style="list-style-type: none"> HISTEDIT
N	DUP	Duplicate Work Order (No Labor or Mat. Charges)	Used for when a duplicate work order was in the system for the same issue.	UDeI	CLOSE	<ul style="list-style-type: none"> HISTEDIT
Y	REJECTED	Manager Rejected (No Labor or Mat. Charges)	Work is outside of the scope or resources of the shop or group.	UDeI	CLOSE	<ul style="list-style-type: none"> HISTEDIT

Y	COMP	Complete	The physical work is completed.	Maximo		<ul style="list-style-type: none"> • CLOSE
N	STOPPED	Work Stopped	Work was started but project was terminated.	UDeI	COMP	<ul style="list-style-type: none"> • CLOSE
Y	HISTEDIT*	Edited in History	The work order was edited in history.	Maximo		
Y	CCOMP	Craft Complete	Mechanic is finished with their portion of the work.	UDeI	INPRG	<ul style="list-style-type: none"> • WMATL • COMP • WAPPR • CLOSE
Y	INPRG	In Progress	The work is in progress.	Maximo		<ul style="list-style-type: none"> • WMATL • COMP • WAPPR • CLOSE
Y	WAPPR	Waiting on Approval	The work order is waiting for approval. WAPPR is the default status for records created in the Work Order Tracking.	Maximo		<ul style="list-style-type: none"> • INPRG • CAN • WMATL • COMP • WPCOND • APPR • CLOSE
Y	WMATL	Waiting on Material	Materials must arrive before the work can be performed	Maximo	APPR	<ul style="list-style-type: none"> • INPRG • WMATL • COMP • WPCOND • CLOSED
Y	WSCH	Waiting to be Scheduled	The work order is waiting to be scheduled. WSCH is the default status for records created in the Preventive Maintenance application.	Maximo	APPR	<ul style="list-style-type: none"> • INPRG • WMATL • COMP • WPCOND • CLOSED

Can accept Charges

Can't accept Charges

* In History Status

** Depends of user's Maximo account privilege

Appendix 6.0: Priority

Title: Priority Chart

File: Priority Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={B4F4B124-9A48-4A3A-914A-A521F2878F06}

Value	Description	Examples
5	<p>Immediate safety threat to people or assets. Must be completed within an urgent time frame (usually same-day) to sustain services to UD personnel and students.</p> <p>Note: All emergency work orders/service requests are always priority 5, including emergency STO.</p>	<p>Major leaks; identified sewage backup; major power outage; gas or burning odor; fire sprinkler or fire alarm activation; active fire; elevator entrapment; chiller or cooling tower down; boiler or utility plant down; key or building set has been lost/stolen.</p>
4	<p>Immediately limits ability to operate, or impairs efficiency and effectiveness. Must be completed within an expedited time frame (same-day or next-day) to sustain services and ensure continued operations. Includes routine STO work orders.</p>	<p>Overflowing or backed up toilet or drain; active leak; eyewash stations or safety showers inoperable; fire alarm troubles; lights out with no other lighting available; door alarms; exterior/private door not securing; refrigerant/steam leak.</p>
3	<p>Potential to become a safety threat. May potentially elevate to a safety threat if not addressed. Priority 3 work orders can be scheduled.</p>	<p>Partial lights out in a room; one clogged toilet in community bathroom with multiple stalls; routine too hot/cold calls; lights out with other lighting minimally available; insufficient domestic hot water; process DI water unavailable; non-active leaks.</p>
2	<p>Potential to significantly limit ability to operate or impair efficiency and effectiveness. Routine work that does not require immediate attention. Priority 2 work orders can be scheduled.</p>	<p>Low water pressure; door strike is sticking or not latching; ballast or light inoperable with other lighting available; mechanical noise but otherwise operational; non-offensive graffiti.</p>
1	<p>Other work, such as aesthetic issues or unplanned project work. Work that does not impact day to day operations of the university. Can be planned or scheduled and does not have the need to be completed within a predetermined time frame.</p>	<p>CM work orders left WSCH. Most minor RFS left WAPPR, such as signs, hanging artwork, patch/paint. Most major RFS such as renovations.</p>

Appendix 7.0: Requestor

Title: Requestor Chart

File: Requestor Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={1441FE71-8264-4B3E-8436-5585DEEAF9E5}

Value	Description	Examples
ARA	Aramark	Dining Services manager and staff
BR	Boiler Room	Boiler operators (Boiler Base)
CONF	Conferences	Conference Services staff and guests
CONTR	Contractor	Outside contractors and sub-contractors
HCM	Custodial Managers	
BS	Custodial Service-BLDG SVS	OBSOLETE – no longer serves a purpose
CUST	Custodian	
ELECT	Electric Shop	
ER	Electronic Shop	
FACILMGMT	Facilities Management	
FIX	Fixit	OBSOLETE – no longer serves a purpose
FPC	FPC	OBSOLETE – no longer serves a purpose
GR	Grounds	
GUESTRES	Guest Resident	OBSOLETE – no longer serves a purpose
HCU	Housing Custodian	Residential Custodian
HV-BAS	HVAC Computer Room	
HV	HVAC Shop	
LS	Lock Shop	
MUTI	Miss Utility	Miss Utility Stakeout requestor, usually contractor or sub-contractor performing an excavation
MOV	Movers	
NSS	Network Services	
OM	Night Mechanic	
SAF	OCC. Health and Safety	Environmental Health & Safety
PL	Plumbing Shop	
RH	Rental Housing	Rental Housing tenants and Real Estate staff
RESIDLIFE	Residence Life	Residence Life staff, including Hall Coordinators and Resident Assistants (RAs)
SS	Structural Shop	Carpenters, Painters, Roofers
STUDENTRE	Student Resident	
UDPD	UDEL Police	
STAFF	UD Staff Person	
UP	UPS Shop	Utility Plant Services (boiler mechanics)

Appendix 8.0: Owner Group (Person Group)

Title: Owner Group Chart

File: Owner Group Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={7C8E0F61-8328-4211-8C00-5F1000FB7B51}

Value	Description	Current/Obsolete	Examples
ACTG	Facilities Accounting	Obsolete	No longer serves a purpose
BUYERS	M&O Buyers and Purchasing	Current	
CITA	CITA	Obsolete	No longer serves a purpose
CUST	Custodial, Special Projects	Obsolete	No longer serves a purpose
CUSTA	Custodial, Academic	Current	Custodians assigned to academic buildings
CUSTNC	Custodial, Newark Conferences	Obsolete	No longer serves a purpose
CUSTRC	Custodial, Residential & Conferences	Current	Custodians assigned to residential & Conference building.
CUSTWM	Custodial, Wilmington	Obsolete	No longer serves a purpose
DIN	Dining	Current	
EHS	Environmental, Health and Safety	Current	Environmental Health & Safety department.
EL	Electrical	Current	
ER	Electronics	Current	
FAC	Facilities	Obsolete	No longer serves a purpose
FPC	FP&C (Do Not Use)	Obsolete	No longer serves a purpose - Facilities Planning & Construction, replaced by Planning & Project Delivery (PPD)
GR	Grounds	Current	
HR	Human Resources	Obsolete	No longer serves a purpose
HSC	Housing Carpenter	Current	
HSL	Housing Lock (Do Not Use)	Obsolete	
HSM	Housing Mechanic	Current	
HSO	Housing Office	Current	
HSP	Housing Painters	Current	
HSU	Housing Upholsterer	Current	
HV-BAS	HVAC BAS	Current	Computer operated HVAC system
HV-BLUE	HVAC Blue Group (Do Not Use)	Obsolete	
HV-CM	HVAC Corrective Maintenance (Do Not Use)	Obsolete	
HV-EM	HVAC Maintenance Mechanic	Current	Owner group for emergency mechanics.
HV-FC	HVAC Filter Crew	Current	
HV-GOLD	HVAC Gold Group (Do Not Use)	Obsolete	
HV-PM	HVAC Preventive Maintenance (Do Not Use)	Obsolete	
HV-SRV	HVAC Services	Current	Light Refrigeration & Heavy Refrigeration.

HVAC	Heating, Ventilation & Air Conditioning	Current	
IN	Insulators	Current	
ISEB	ISEB Shop	Current	
LK	Lock Shop	Current	
LWA	Lewes Academic	Current	UD Lewes Campus
LWC	Lewes Custodial	Current	UD Lewes Campus
LWR	Lewes Residential	Current	UD Lewes Campus
LWS	Lewes Shops (Do Not Use)	Obsolete	No longer serves a purpose
ME	Maintenance Engineering	Current	aka SEE Group
MOV	Campus Movers	Current	
MPL	Maintenance Planning	Obsolete	No longer serves a purpose
OM	Operations and Maintenance	Current	Owner group used for RFS's under review.
OPS-CC	Operations Call Center	Current	
PEST	Pest Control - Auxiliary	Current	
PL	Plumbing	Current	
PPD	Planning & Project Delivery	Current	
RC	Recycling	Current	
REQUESTR	All Process Management Requestors	Obsolete	
STR	***Do Not Use** Old Structural **Do Not Use**	Obsolete	
STR-C	Carpenter Shop	Current	
STR-M	Masonry and Caulk (Contractor Only)	Current	
STR-P	Paint Shop	Current	
STR-R	Roofing Shop	Current	
SW	Solid Waste	Current	
UPS	Utility Plant Services	Current	

Appendix 9.0: FAS Type

Title: FAS Type Chart

File: FAS Type Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={08BEC559-834C-4A3F-B4D4-7363623F1EEE}

Value	Description	Examples
CM	Capital Maintenance	Not currently used
CMMR	Capital Maintenance Minor Repair	Projects funded by the M&O CMMR budget
CU	Condensate Utility	Obsolete; not used
CUMR	Condensate Utility Minor Repair	Obsolete; not used
CUST	Customer Funded	Non-RFS projects funded by a customer GL
DM	Deferred Maintenance	Projects funded by the SEE DM budget
EC	Energy Conservation	Not currently used
ECMR	Energy Conservation Minor Repair	Not currently used
HS	Facilities Housing	Obsolete; not used
HSMR	Facilities Housing Minor Repair	Obsolete; not used
SB	Shop Budget	Projects funded by an M&O shop's budget
WC	Wilmington Campus	Obsolete; not used
WCMR	Wilmington Campus Minor Repair	Obsolete; not used

Appendix 10: Asset Statuses

Title: Asset Statues Chart

File: Asset Staues Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={94A9048E-2D4E-4775-89E1-8D6AFC8513F4}

Internal Value	Value	Description	Default
DECOMMISSIONED	BROKEN	Broken	N
DECOMMISSIONED	DECOMMISSIONED	Decommissioned	Y
DECOMMISSIONED	INACTIVE	Inactive	N
DECOMMISSIONED	LEASED OUT	Property Leased to Others	N
DECOMMISSIONED	MISSING	Missing	N
DECOMMISSIONED	SEALED	Sealed	N
IMPORTED	IMPORTED	Imported from building model	Y
NOT READY	NOT READY	Not Ready	Y
OPERATING	ACTIVE	Active	N
OPERATING	IBM 1 ASSET ¹	SINGLE ASSET FIX - DO NOT USE	N
OPERATING	LIMITEDUSE	Limited Use	N
OPERATING	OPERATING	Operating	Y

Appendix 11: Asset Type

Title: Asset Type Chart

File: Asset Type Chart

Revised: 9/10/2020

Source: https://udwinprod.sharepoint.com/sites/Team-MODocumentManagement/_layouts/15/Doc.aspx?OR=teams&action=edit&sourcedoc={3C8634D2-872A-4D56-8B87-9B83F6112483}

Asset Type ID	Asset Type Description
AC	AIR CONDITIONING
ACT	ACTUATOR
AD	AIR DRYER
AHU	AIR HANDLING UNIT
AIRCIR	AIR CURTAIN
BFP	BACKFLOW PREVENTER
BLR	BOILER
BRK	BREAKER
BRNR	BURNER
CHLR	CHILLER
CND	CONDENSER
CNTRL	CONTROLLER
COIL	COIL (HEATING, COOLING, REHEAT, ETC.)
COLDRM	COLD ROOM
COMP	AIR COMPRESSOR
CRAC	COMPUTER ROOM AIR CONDITIONER
CT	COOLING TOWER
DA	DEAERATOR
DAMP	DAMPER
DET	DETECTORS
DHUM	DEHUMIDIFIER
DR	DOOR
DW	DISHWASHER
DWH	DOMESTIC WATER HEATER
ECON	ECONOMIZER
EH	HEATER, ELECTRIC
EKA	ELECTRIC KITCHEN APPLIANCE
ELV	ELEVATOR
ENVCH	ENVIROMENTAL CHAMBER
EVAP	EVAPORATOR
EWSS	EYEWASH / SAFETY SHOWER STATION
FACILITIES	Facilities Assets
FAH	FORCED AIR HEATER
FAN	FAN
FAP	FIRE ALARM PANEL
FCE	FURNACE
FCU	FAN COIL UNIT

FLTR	FILTER
FOOD SERVICE	Food Service Assets
FP	FIRE PUMP
FR_DR	FIRE DOOR
FUMEHD	FUME HOOD
FZR	FREEZER
GEN	GENERATOR
GFKA	GAS FIRED KITCHEN APPLIANCE
HP	HEAT PUMP
HTX	HEAT EXCHANGER
HUM	HUMIDIFIER
HVAC-PKG	PACKAGED HVAC UNIT
HWHTR	HOT WATER HEATER
ICE	ICE MACHINE
INT	INTECEPTOR
INX	ION EXCHANGER
ISOVLV	ISOLATION VALVE
KEH	KITCHEN EXHAUST HOOD
KELT	KELTRON SYSTEM
LGT	LIGHTING
MCC	MOTOR CONTROL CENTER
MCS	MOTOR CONTROL STARTER
MCU	MOTOR CONTROL UNIT
METER	METER
MH	MANHOLE
MSD	MAIN SERVICE DISCONNECT
MTR	MOTOR
PMP	PUMP
PNL	PANEL
POLISH	POLISHER SYSTEM
POOL	POOL
PPP	POWER PRESSURE PUMP
PRV	PRESSURE REDUCING VALVE
PSTIND	POST INDICATOR
RADEQ	RADIO EQUIPMENT
REC	RECEPTACLE
REF	REFRIGERATOR
REF_EQ	REFRIGERATED EQUIPMENT
RFD	REFRIGERATED DRYER

RODI	REVERSE OSMOSIS/DEIONIZED WATER SYSTEM
STRMRET	STORM RETENTION
SUBSTA	SUBSTATION (MED VOLTAGE)
SW	SWITCH
TNK	TANK/VESSEL
TRAPPR	TRAP PRIMING SYSTEM
TRSHCOM	TRASH COMPACTOR
TS	TRANSFER SWITCH
UH	UNIT HEATER
VACSYS	VACUUM SYSTEM (FUME)
VAV	VARIABLE AIR VOLUME
VEV	VARIABLE EXHAUST VOLUME
VFD	VARIABLE FREQUENCY DRIVE
VLV	VALVE
VPMP	VACUUM PUMP
WAC	WINDOW AIR CONDITIONER
WBFS	WATER BOTTLE FILLING STATION
WC	WATER COOLER
WSOFT	WATER SOFTENER
XFMR	TRANSFORMER
FLEET	Fleet Assets
IT	IT Assets
PRODUCTION	Production Assets

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