Asset Template Process

Contents

Overview

The Asset Template application is part of the Maximo Asset module. The template makes it easier to create new assets that share basic set-up defaults. Spare parts, attached meters and preventive maintenance are some of the template items that can save time. The purpose of this document is to describe and lay out the specific steps for creating and using an Asset Template in Maximo at IPSC.

This document covers:

- **Assumptions and Data Requirements**
- **Assigning planned work orders via Assignments Tab**
- **Assigning unplanned work orders via Assignment Tab**
- **Completing an Assignment via Assignment Tab**

Assumptions and Data Requirements

These process depend on the following assumptions and data requirements:

- Assets created with the Asset Template application will be subject to the same on-boarding process of all new assets.
- Additional specifications and values exist that will need to be entered after creation of the new asset(s).
- The template's auto-number feature may not be feasible for the organization's asset numbering.

Basic Steps for Creating an Asset Template

1. Go to the Asset Template Application in the Asset Module of Maximo.
2. Click on the icon for "New Asset Template".

3. Enter information in the following fields:
    a. Asset Template (Alpha Numeric Identifier for the template)
    b. Asset Template Description (Describe the template's use)
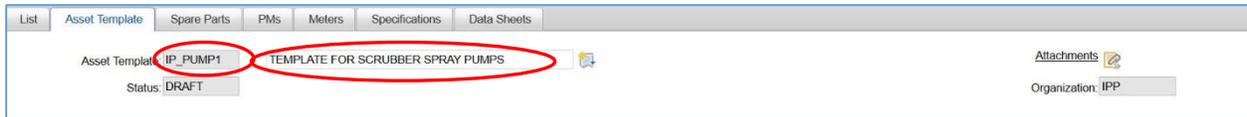
4. Enter information in the Details section that will apply to all assets using the template.

   a. Asset Description, the proper name for the assets.

   b. Asset Type.

   c. Manufacturer, look up manufacturer if applicable to all assets using the template.

   d. Vendor if applicable

   e. Prices: Purchase Price, Replacement Cost, Budgeted if standard.

   f. Priority, the asset's priority used to calculate work priority etc.
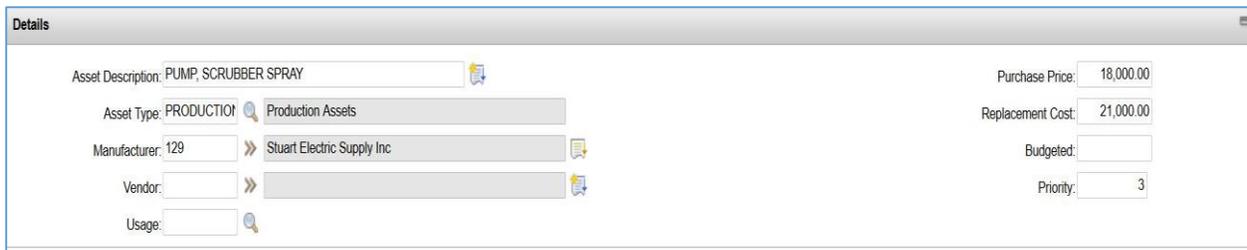
Note: Only required fields need to be filled in, however more information on the template means less information to capture on the asset record after creation.

5. Save the Asset Template record.

   a. The basic Asset Template is now created in Draft status. Steps below will detail using the template to generate asset records and populating information in the various template tabs.

Additional Features Explained

Spare Parts Tab

1. Open the Spare Parts tab of the Asset Template record.

2. There are 2 ways to create the Spare Parts List. Option 1 is using the "Select Spare Parts" button.
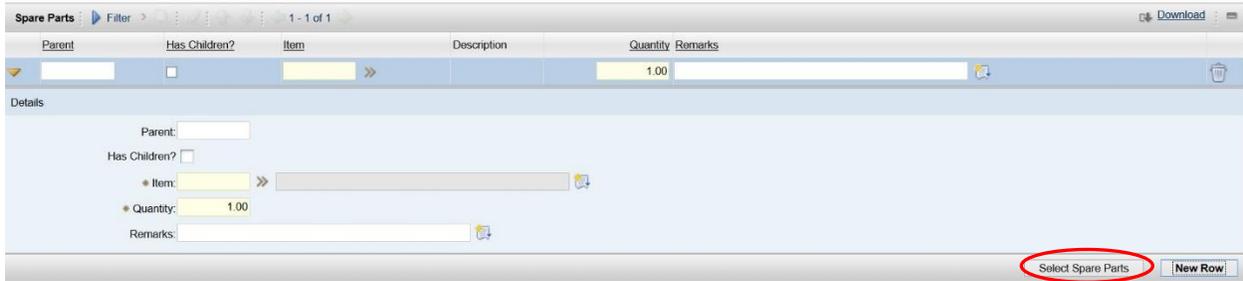
3. The item selection window's list can be filtered (click on "filter" to turn on filters).

   a. Select item(s) by clicking the checkbox next to the item number, click OK.

   b. Multiple selections from the list at one time will create a new row for each item checked.

   c. Ensure quantities used on an individual asset are entered.

   d. If the Asset Template is to be applied to existing assets, use an asset number in the "Enter asset to search for parts" field, click the "Refine" button.

   e. Select all (if required) or any multiple of items from the refined list, click OK.
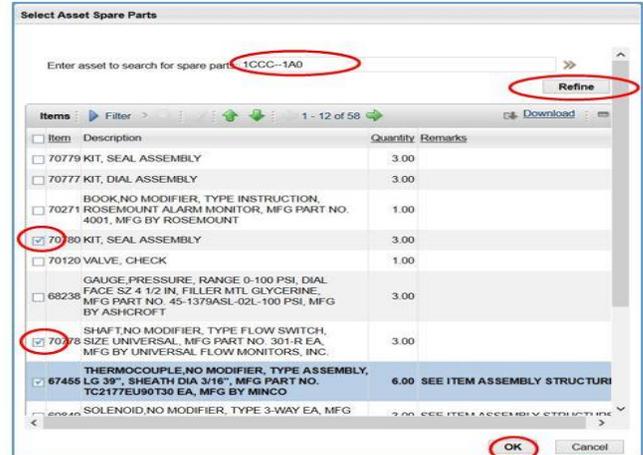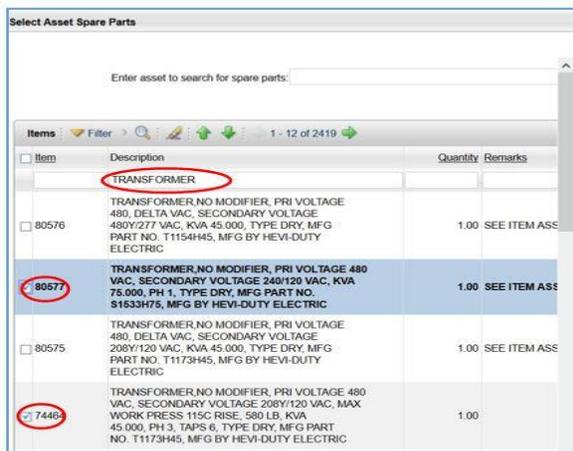
Note: Ensure quantities are correctly entered for each line. Quantities need to reflect the number of items used on an <u>individual</u> asset that uses the template.

4. The second option for selecting items for the Spare Parts List is to click on the "New Row" button.

5. Use the Detail Menu next to the Item field to open the Select Value table. Select Value

    a. Filter the list as needed to find the desired item.

    b. Click on the Item Number to select the item for the row.

    c. Enter the item quantity needed as spares for an individual asset using the template.

    d. Repeat as many times as needed to complete the Spare Parts list.

Select Value
Classification

6. Option: Use the Classification Search table to filter the Item list.
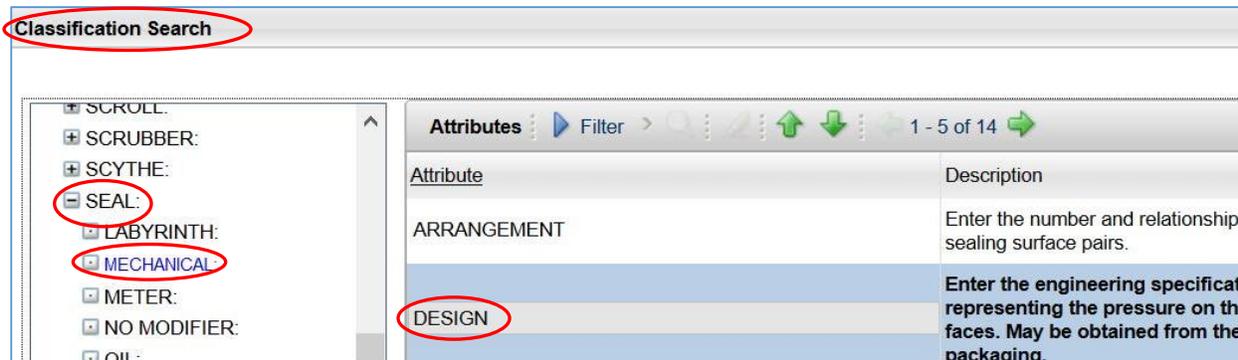
7. Use the Classification Search drilldown to filter for item classification and type.

    a. Browse by different Attributes if necessary.

    b. Filter the result list if needed.

    c. Select an item for the row by clicking on the Item number.

Item	Description
351	SEAL,MECHANICAL, SIZE 4.75 IN, MFG PART NO. 429 468D64X3 EA, MFG BY JOHN CRANE
652	SEAL,MECHANICAL, SIZE 1.75 IN, HRDWR MTL FOR TURBINE EXTRACTION VALVES, ABRASIVE MTL CL150#, MFG BY ATTWOOD & MORRILL, MFG PART NO. 25812-157-0000-000 EA
653	SEAL,MECHANICAL, SHAFT/SLV DIA 1.375 IN, STYLE 9T, DESIGN FOR TURBINE EXTRACTION VALVES, MFG BY JOHN CRANE, MFG PART NO. B231-60 EA
2422	SEAL,MECHANICAL, SHAFT/SLV DIA 1.25 IN, MFG PART NO. 89852 EA, MFG BY DURAMETALLIC

8. Option: Use the "Go To" from the Item field Detail Menu to hyperlink to the Item Master or Inventory module.

Go To   Item Master (Nuc)
View Item Availability   Inventory (Nuc)

    a. Filter Item/Inventory list to find desired item.

    b. Click on Item Number to open the item's record.

    c. Click on "Return with Value" on the Tool Bar, to bring the item to your Spare Parts list.

d. Ensure quantities on the returned items for you Spare Parts list are correct.

9. "Remarks" and "Remarks Long Description" if needed, can be added for each Spare Parts row.

10. Any row entered in error, or no longer a valid Spare Part, can be deleted from the template.

11. Before leaving the Spare Parts Tab, save the Asset Template record.
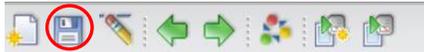
The PMs Tab

Since Preventive Maintenance work is most often written to a specific set of assets, the Asset Template can save a great deal of time spent adding data in the PM Module. The Spare Parts list created within the Asset Template is carried over to the Master PM once a PM record is specified in the Template. Also, all assets generated via the template will transfer their Operational Date and Asset Number to the PM module to ensure PM generation can be automated.

1. Open the Asset Template record from the Asset Template application in the Asset Module.

2. On the PMs Tab, click on the New Row button.
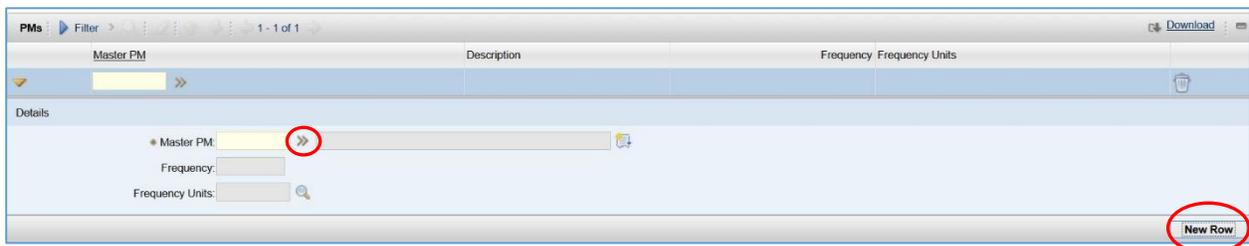
3. Use the Detail Menu of the Master PM Field to select a Master PM.

a. Option A: Use the Select Value option to open the Select Value list.
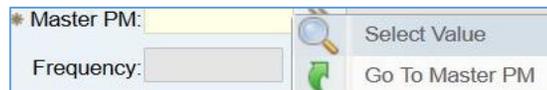
b. Filter the Select Value list as needed and select a Master PM by clicking on the Master PM number.
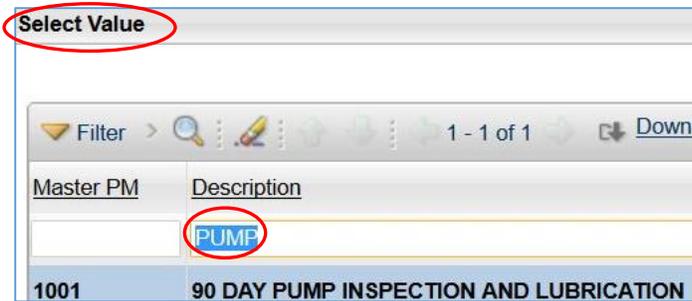
c. Option B: Use the Hyperlink to go to the Master PM module.

d. Filter the Master PM list as needed to locate the Master PM record for the Asset Template. Click on the Master PM number to open the Record.
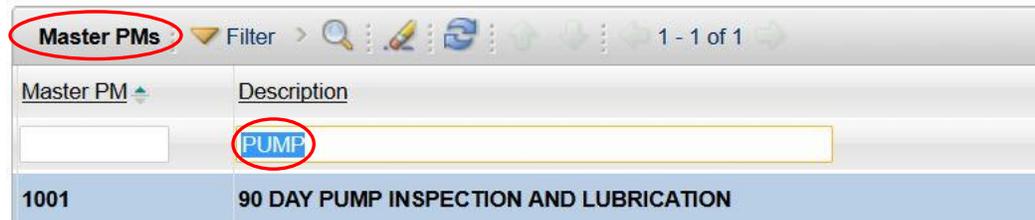
e. Click on "Return with Value" on the Master PM Module toolbar.

4. Use New Row button to associate any additional PMs with the Asset Template.

5. Save the Asset Template record.

Specifications Tab

The Asset record has a Specifications Tab to input and view the attributes unique to that asset. The Asset Template allows selection of a pre-built Classification that places the proper specification attributes on the asset record for entering the specific values for each of the attributes.

1. Open the Asset Template record's Specification Tab

2. Classify the Asset Template by clicking on the Detail Menu next to the Classification Field

3. Use the Classify Drilldown to select the proper classification by clicking on the blue box next to the proper classification.

Classify

```
PROTRACTOR:
  ⊞ ■ PROXIMITOR:
  ⊞ ■ PRUNER:
  ⊞ ■ PSYCHROMETER:
  ⊞ ■ PULL:
  ⊞ ■ PULLER:
  ⊞ ■ PULLEY:
  ⊟ ■ PUMP:
      ▣ ■ CENTRIFUGAL:
      ▣ ■ DIAPHRAGM:
      ▣ ■ NO MODIFIER:
      ▣ ■ PULVERIZED MATERIAL:
      ▣ ■ RECIPROCATING:
      ▣ ■ ROTARY:
  ⊞ ■ PUNCH:
```
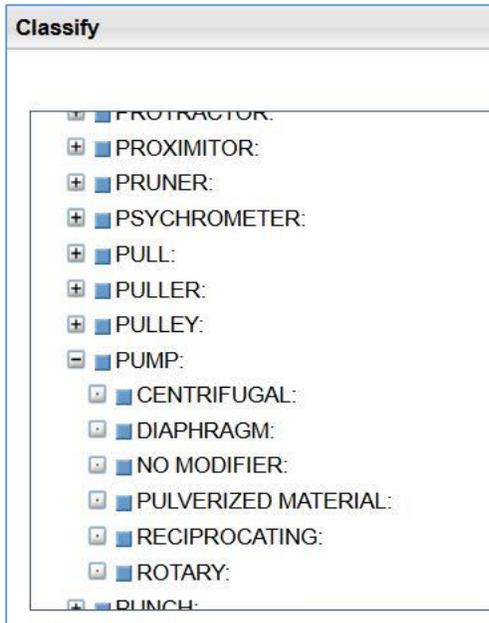
4. The specification attributes are added to the Asset Template Specification Tab.

List	Asset Template	Spare Parts	PMs	Meters	Specifications	Data Sheets

Asset Template: IP_PUMP1   TEMPLATE FOR SCRUBBER SPRAY PUMPS

Classification: PUMP \ ROTARY

Class Description:

Specifications ▶ Filter ▷ ... 1 - 10 of 10

Attribute	Description	Data Type	Alphanumeric Value
▷ TYPE	Enter the type.	**ALN**	
▷ SPEED	Enter the operational speed.	ALN	
▷ RATING	Enter the pressure rating.	ALN	
▷ PORT SIZE	Enter the port size.	ALN	
▷ MANUFACTURER PARTNO	1122334455	ALN	
▷ MANUFACTURER NAME		TABLE	
▷ INTERNAL MATERIAL	Enter the internal materials.	ALN	
▷ DRIVER	Enter the type of driving force. Enter manual as HAND.	ALN	
▷ CASING MATERIAL	Enter the casing material.	ALN	
▷ CAPACITY	Enter the maximum amount that can be held or stored.	ALN	

5. Any static Alphanumeric Values can be entered in the value fields, if they apply to each asset that will use the template.
   a. Values specific to each asset can be entered through the Asset record's Specifications Tab once the asset(s) creation has taken place.

	Attribute	Description	Data Type	Alphanumeric Value
▶	TYPE	Enter the type	ALN	Rotary
▶	SPEED	Enter the operational speed.	ALN	
▶	RATING	Enter the pressure rating.	ALN	
▶	PORT SIZE	Enter the port size.	ALN	
▶	MANUFACTURER PARTNO	1122334455	ALN	
▶	MANUFACTURER NAME		TABLE	
▶	INTERNAL MATERIAL	Enter the internal materials.	ALN	
▶	DRIVER	Enter the type of driving force. Enter manual as HAND.	ALN	Screw Drive
▶	CASING MATERIAL	Enter the casing material.	ALN	Stainless Steel
▶	CAPACITY	Enter the maximum amount that can be held or stored.	ALN	30 GPM

6. Optional method of classifying the Asset Template:
   a. Use the Detail Menu next to the Classification Field to access the hyperlink to go to Classifications.
   b. Filter the Classification list to query the classification needed for the template.
      i. Select the Classification by clicking on the Classification Name.

      ii. Click on "Return with Value" in the Classifications module toolbar

7. Save the Asset Template record.

Meters Tab

Meters are an important tool to assist in management of assets. Meter readings, combined with maintenance history and failure reporting can assist in strategic decisions within Maximo. Including: PM meter based schedules, asset life-cycles, predictive maintenance, inspection and lubrication cycles, warranty management and more. The Meter Tab of the Asset Template allows meter(s) and parameters governing the meters, to be attached to the assets associated with the template. The steps to use the Meter Tab of the Asset Template application are as follows:

1. Open the Asset Template record and enter the Meters Tab.
2. If a Meter Group has previously been created, use the Detail Menu next to the Meter Group field and select the Meter Group from the Value List.
   (This will automatically populate your Meter Detail rows).

Note: *If a Meter Group, or Meters have not been created, here are the actions that should be taken: Create the Meters in the Meter Application of the Asset Module. Enter all required information for the meters as prompted by the application. If any of the Meters created will be grouped together for certain asset types, go to the Meter Group application and create a new record. Name and describe the record and select the meters for the group.*

3. If not using a Meter Group, click New Row button in the Meter Detail section, then through the Detail Menu of the Meter field, click on Select Value to open the value list and select the meter.
   a. Option: From the Detail Menu next to the Meter field, use the hyperlink to "Go to Meters", filter the list if needed and open the Meter Record.
   b. Click on "Return with Value" on the Meters Toolbar.

Or:

Note: *The following steps still need to be completed no matter how the meters were selected in the above steps.*

4. In the Meter Details section, fill in optional Remarks and Sequence number for the meter.

5. For Continuous Meters, enter required information in the Continuous Meter section.

a. Select from the "Average Calculation Method" Detail Menu Select Value list:

Value	Description
ALL	**All readings**
SLIDING-DAYS	Readings from last n days
SLIDING-READINGS	Last n readings
STATIC	Average not recalculated

b. Select from the "Reading Type" Detail Menu Select Value list:

ACTUAL	**Cumulative usage**
DELTA	Incremental usage

c. Select from the "Accept Roll Down From" Detail Menu Select Value list:

ASSET	**Accept Asset rolldown.**
LOCATION	Accept location rolldown
NONE	Do not accept rolldown.

6. The Meters selected and detailed, will now roll down to assets using this template.

7. Save the Asset Template Record.

Data Sheets Tab

Data sheets play a crucial part in the management of assets that require calibration. Data sheets provide technicians with the information that they need to perform a calibration. A data sheet is a template that defines the specifications of an asset for the calibration process. Only the steps that detail the use of the Data Sheet Tab in the Asset Template are outlined below.

1. Access the Asset Template record in the Asset Template Application of the Asset Module.

2. Navigate to the Data Sheets Tab.

3. If Data Sheets have not been created, they must be created through the Data Sheet Template

    Application of the Planning Module. (See Note below)

Note: *Although the Data Sheet Template Application's detailed instructions are not part of this process document. Some screen shots of the application are shown below as an example of some of the information required to set-up the Data Sheet Template. Maximo Help Files for the Data Sheet Template Application are a good source of information for creating a Data Sheet Template.*

The following illustration shows some of the Tabs that require data entry in the Data Sheet Template:

The Fields of the Data Sheet Template Asset Functions section are shown below for future reference:
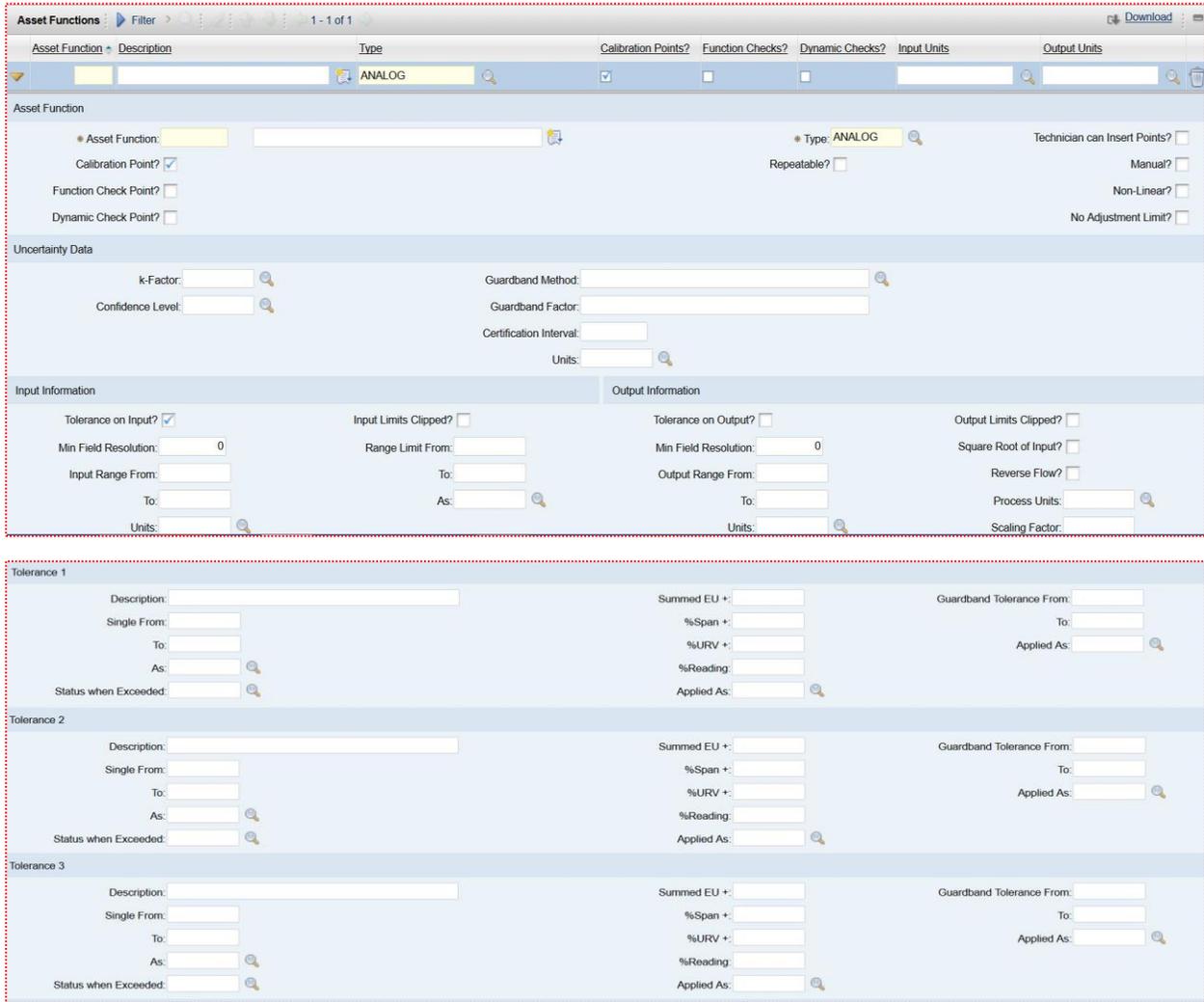
4. With active Data Sheet Template(s) existing in the system, click on the New Row button

5. Use the Select Value option of the Detail Menu next to the Data Sheet Template field.

6. Filter the value list for the desired Data Sheet Template and Click the Data Sheet Name to select.

   a. Data Sheet Templates must be in the Approved status before showing up on the list.
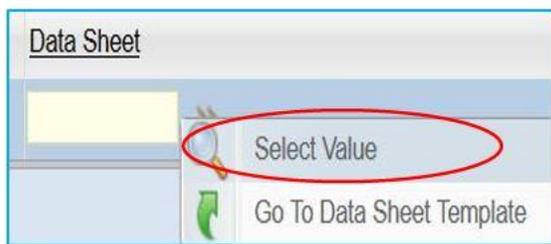
7. Option: From the Data Sheet field Detail Menu, select "Go to Data Sheet Template."
   a. Filter the Data Sheet Template list if needed and select the record.
   b. Click on the "Return with Value" in the Data Sheet Template toolbar.
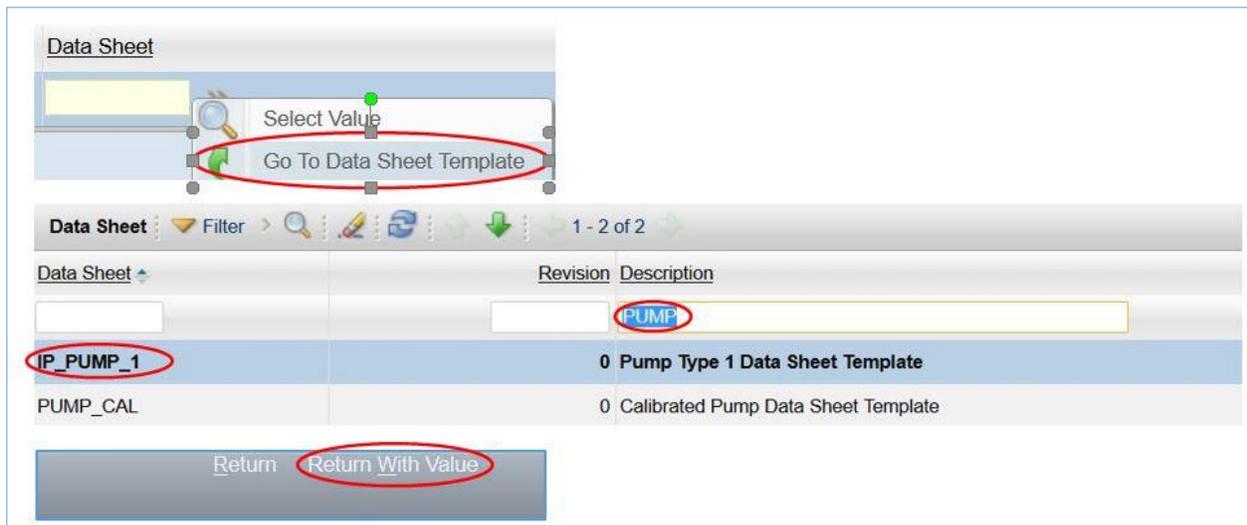
8. Add New Rows as needed.

9. Save the Asset Template record.

Using the Asset Template to Create Asset Records

With a completed Asset Template, existing assets or new assets can now be associated. The steps below detail the process of using the template created in the previous steps.

Apply Template to Existing Assets

1. Open the Asset Template Record and change the status of the template to Active. Only Active templates can be applied to assets.

2. Choose "Apply to Existing Assets" from the Select Action menu.

3. A select value window is available for the selection of the Site that the assets are part of. Select "IGS" and click OK.

4. The Default Asset Table Data section is used for setting default values for the assets chosen in the Asset section. Whatever is entered here will be applied to each new asset selected in the rows of the Asset section, so use caution. All entry in this section is optional.

Use the Default Asset Table Data section to set default values for new rows inserted in the Assets table window. Existing data will be overwritten when the template is applied.

a. Use the Detail Menu next to the Location field to select a default location to be applied to all of the New Row assets. Remember, each asset *usually* has a unique location which can be selected in the Asset section of the New Row.

b. Use the Select Value list for choosing the Asset's Status from the list, ("Operational" is most common).

c. Serial Number of Asset(s).

d. Installation Date of Asset(s).

e. PM Start Date of Asset(s).

f. PM Storeroom of Asset(s) for Spare Parts.

5. Click New Row button in the Asset section to begin adding existing assets to the template *one at a time,* or click the Select Assets button to select *multiple* assets from the list.

6. Filter the Asset Selection list as needed and select an asset (if using New Row) or select multiple assets (if using Select Asset button).

a. The illustrations above show the single asset selection through the New Row button and the multi-asset selection through the Select Asset button.

7. Edit/select the information as needed on the asset rows.
    a. Click Trash Can icon to delete any unwanted rows.
    b. Click OK button when completed with review/edit of all rows.
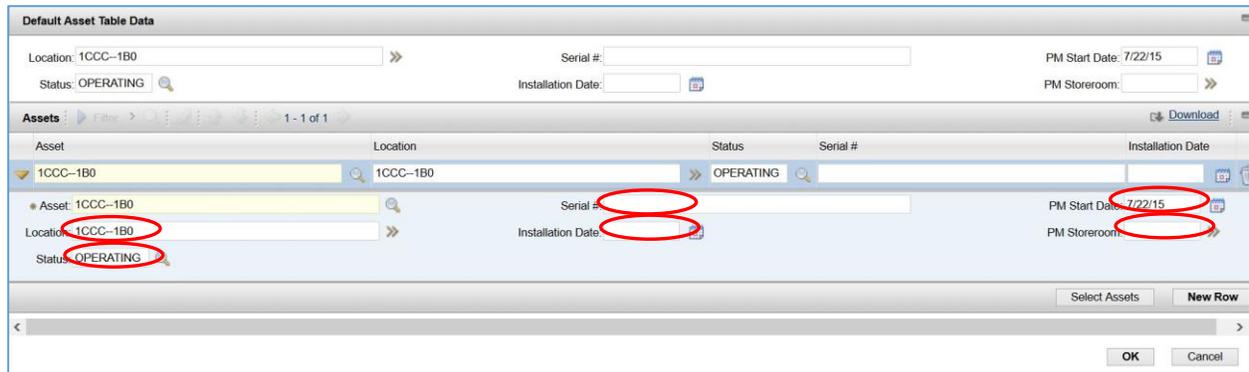
8. The following window will open. Click "OK".
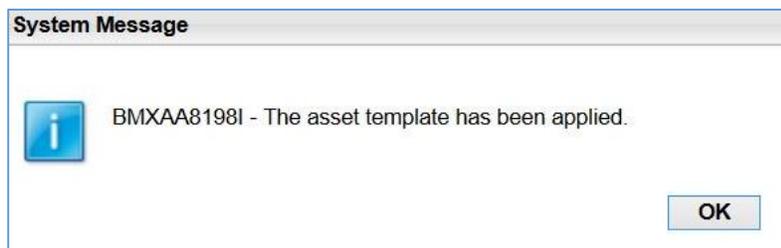
9. The template has now been applied to the assets you selected.

Generate New Assets with the Template

1. Change or verify that the Template is in the Active status.

2. Choose "Generate New Assets" from the Select Action menu.
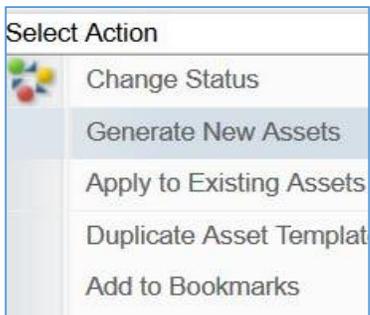
3. Select Site from the Select Value window, (IGS).
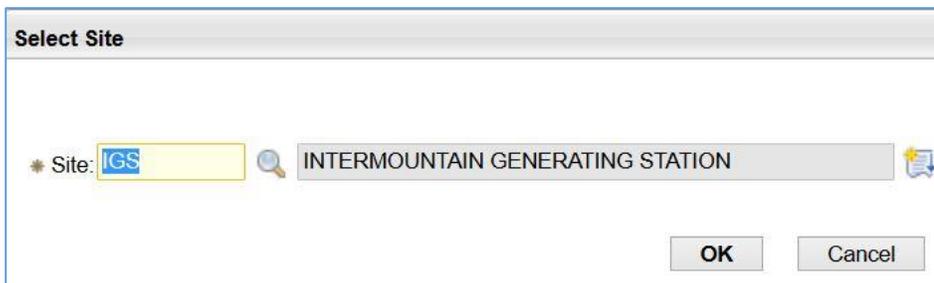
4. On the Generate New Assets screen *optionally* enter information in the Default Asset Table Data section. Remember, this default data will be applied to all of the assets generated. It is common practice to have the default status of new assets set to "Not Ready" until they have been approved, installed and made operational.
   a. **Note:** *There will be individual asset records generated where non-default information can be input before the process is complete.*

5. In the Generate Asset Numbers section, enter how many new assets need to be generated with the template.
   a. Auto generation of Asset Numbers would take place at this point unless more fields are filled out in the Generate Asset Numbers section.
   b. Enter a "Starting Asset #", this is the number that will increment based on the quantity selected.
   c. Enter a Prefix, the alphanumeric string before the incremental numbers.
   d. Enter a Suffix, the alphanumeric string after the incremental numbers.
      **Note*: Once generated, the asset numbers ARE ABLE TO BE EDITED to meet your needs, until the final "OK" button is clicked to end the process.*

6. Click on the "Generate Assets" button.

7. Edit the individual asset rows as needed. **Every field is able to be changed at this point, even the asset number which will become Read-Only after this process.**

8. Click the "OK" button when all edits are completed.

9. The Asset Template has been applied when the following message appears (click OK):

System Message

BMXAA8198I - The asset template has been applied.

OK