

Creating New Locations and Assets

Contents

- Overview 2
- Creating the New Location 2
 - Option 1: Copy Method (preferred)..... 2
 - Option 2: Create From Scratch 4
 - Option 2 continued: Associating the New Location and Setting Hierarchy Position..... 5
 - Option 2 continued: Classifying the Location 6
- Creating the Related Asset..... 8

Overview

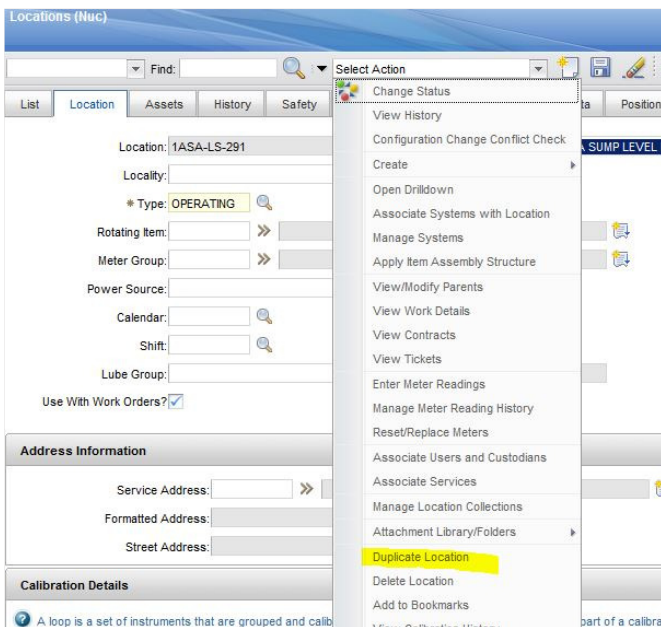
The purpose of this document is to describe and lay out the specific steps for creating, classifying, and associating new Locations and Assets in Maximo. This is a prerequisite to using Locations in Work Orders and elsewhere. This procedure does not address the editing of Location data and associated classifications during normal operation but only defines the creation process to ensure they will function as expected in Maximo when needed.

These sections are intended to be executed in the order presented as error messages will result from missing requirements if done out of sequence.

Creating the New Location

Option 1: Copy Method (preferred)

1. Launch the Locations (Nuc) application under the Go-To, Assets submenu.
2. To help with format conformity first search for a Location using the List tab that is similar to what you are going to add and try to pattern your new Location after that. For example if you are adding a level switch such as "1FWA-LS-37" you could enter on the List tab Location field "-LS-" and press enter. Click on to select a level switch Location that is similar to what you'll be adding to display the detail record.
3. From the Select Action drop-down menu choose Duplicate Location.



4. In upper case enter the new Location ID and Description replacing the description that is populated from the record you copied from. Use the Long Description icon if necessary to add a longer title.

- Click on the Save icon and the Parent Location will now appear which was the Parent of the record you copied from and may need to be changed. If it does not need to be changed skip to step 7.
- From the Select Action drop-down menu choose View/Modify Parents. Enter the new Parent Location and click Ok. Click the Save icon. Note the chevrons near the right margin by the trash can. If you don't know the Parent Location you can click on this icon and choose from a select value list or you can choose "Open Drilldown" which is shown below. It gives you the ability to search down a tree structure from the top to locate the logical Parent Location. You click the + sign to expand and the little blue square to select.

View/Modify Parents

Location: test BLR AREA SUMP LEVEL LO

To change the parent of this location for a given system, type a value in the New Parent field in the appropriate rows. To apply your changes and return, click OK.

System	Parent	Description	New Parent
PRIMARY	1ASA--2A	PUMP, BOILER SUMP	2ASA--2A

OK Cancel

Drilldown

Select to show children. Select to hide children. Select to return location / asset.

Locations Assets

Location: IPP INTERMOUNTAIN POWER PROJECT

Asset in Location:

System PRIMARY

- IPP: INTERMOUNTAIN POWER PROJECT
 - 1U: UNIT 1 GENERATION & AQCS FACILITIES
 - 2U: UNIT 2 GENERATION & AQCS FACILITIES
 - 2AP: AUXILIARY POWER SUPPLY UNIT 2
 - 2AS: ASH & SCRUBBER SOLIDS UNIT 2
 - 2ASA: BOTTOM ASH
 - 2ASA--00: CONTROL PANEL, BOTTOM ASH
 - 2ASA--1A: PUMP, BOTTOM ASH TRAN
 - 2ASA--1B: PUMP, BOTTOM ASH TRAN
 - 2ASA--2A: PUMP, BOILER SUMP
 - 2ASA-ABV-308: ASH TRANSFER TANK OUTLET ISOL
 - 2ASA-ABV-309: ASH TRANSFER TANK OUTLET ISOL
 - 2ASA-ABV-310: ASH XFER TK FEED SUMP MKUP ISL

Show All Systems
Show Path to Top
View Work Details

- IMPORTANT!** Edit the GL and Labor account fields if you changed to a different Parent Location with a different cost center. Follow the instructions in the dialog box that is presented when you click on the magnifying glass. It is a two step selection for each cost account. Look at the mimic in the top half of the dialog box to see the results before clicking on Ok. Typically -401 is the GL account and -101 is labor. If you are not 100% certain of these values, please call Kevin Miller x6802 for assistance. This affects the cost charged against this cost center for all future work orders based on this new Location.
- If this is a Tagging Location Isolation Point (Operations only) enter a Locality and Power Source if it is known in the fields provided.
- Ensure the checkbox titled "Use With WOs" is checked. This ensures the Location can be accessible for use on a WO.
- You can enter other information in the optional white fields if desired. The "Type" will already be populated based on the Location you copied from and the "Status" will already be set to "Operating".

- Click on the Specifications tab and update the existing specification in the “Alphanumeric Value” column. Since you copied from an existing similar Location the classification on the new Location will be the same but the values will likely be different. After making all the adjustments needed click on the Save icon.

The screenshot shows the 'Locations (Nuc)' application interface. The 'Specifications' tab is active. The 'Location' field contains 'test' and the 'Description' field contains 'BLR AREA SUMP LEVEL LO'. The 'Classification' is 'LOCATION \ PROJECTIDGEN'. Below this is a table of specifications:

Attribute	Description	Data Type	Alphanumeric Value
BLDG	BUILDING WHERE LOCATED	ALN	Boiler
COL-ROW	COLUMN - ROW COORDINATES	ALN	K2-104
ELEV	ELEVATION OF EQUIPMENT LOCATION	ALN	4676-0
PROJNO	CAP PROJECT OR WORK ORDER NUMBER REFERENCE	ALN	
PURSPEC	B&V CONTRACT PURCHASE SPECIFICATION	ALN	62.1801
PIDDWG	PIPING & INSTRUMENT REFERENCE DRAWING	ALN	1ASA-M2002C
PLANTARR	PLANT ARRANGEMENT REFERENCE DRAWING	ALN	
ONELINE	ONE-LINE ELECTRICAL REFERENCE DRAWING	ALN	

Option 2: Create From Scratch

- Launch the Locations (Nuc) application under the Go-To, Assets submenu.
- Click on the New Location icon located next to the Select Action drop down menu on the toolbar.

The screenshot shows the 'Locations (Nuc)' application interface with the 'Location' tab active. The 'New Location' icon (a document with a plus sign) is highlighted in yellow. The 'Location' field contains 'test' and the 'Description' field contains 'BLR AREA SUMP LEVE'. The 'Locality' field is empty. The '* Type:' field is set to 'OPERATING'. Below this are fields for 'Rotating Item:', 'Meter Group:', and 'Power Source:'.

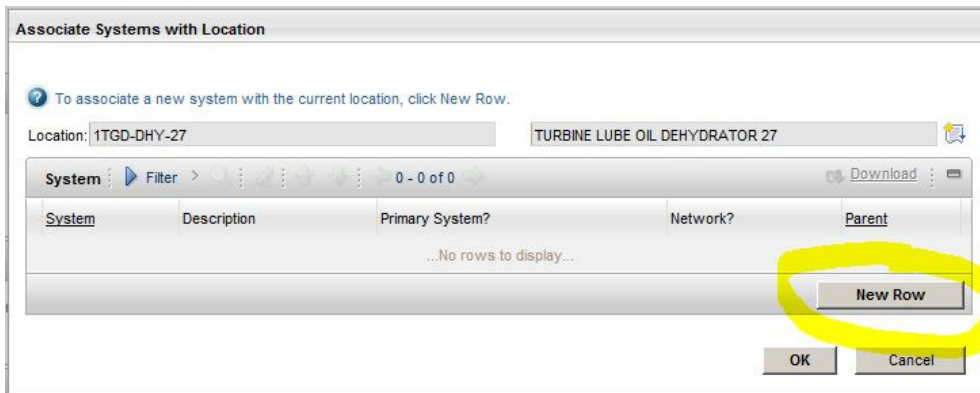
- In upper case enter the new Location ID and Description. Use the Long Description icon if necessary to add a longer title.
- Click on the Select Value icon for the required “Type” field and choose “Operating”.
- IMPORTANT!** Enter the GL and Labor accounts in the required fields. Follow the instructions in the dialog box that is presented when you click the magnifying glass. It is a two step selection for each cost account. Look at the mimic in the top half of the dialog box to see the results before clicking on Ok. Typically -401 is

the GL account and -101 is labor. If you are not 100% certain of these values, please call Kevin Miller for assistance. This affects charges against this cost center for all work orders based on this new Location.

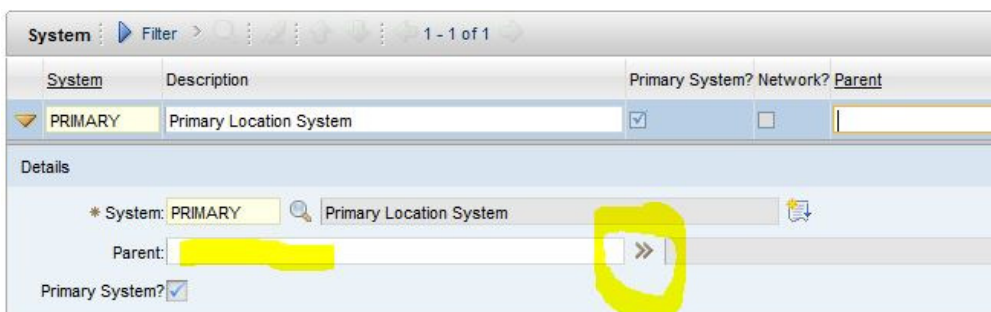
6. If this is a Tagging Location isolation point (Operations only) enter a Locality and Power Source if it is known in the fields provided.
7. Check the checkbox titled "Use With WOs". This insures the Location can be accessible for use on a WO.
8. You can enter other information in the optional white fields if desired.
9. Click on the Save icon.

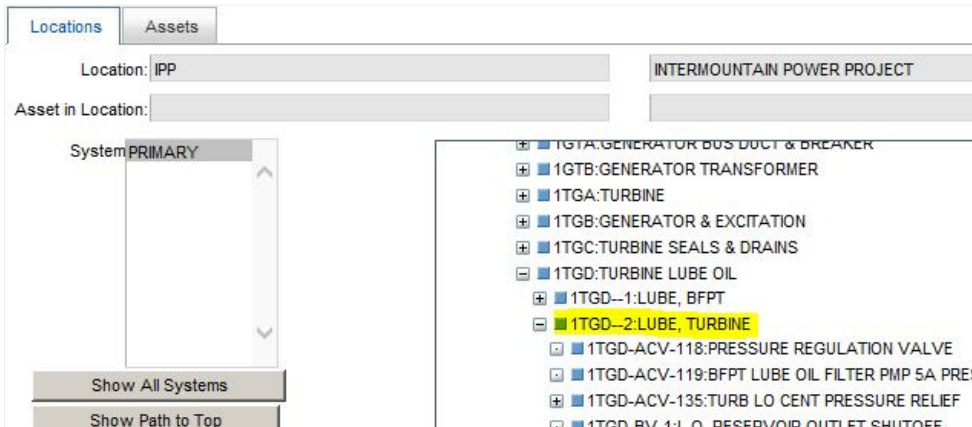
Option 2 continued: Associating the New Location and Setting Hierarchy Position

1. Click on Select Action popdown menu with the new Location still on the screen.
2. Click on Associate Systems with Location.
3. Click on New Row




4. Click on the System Select Value icon and choose Primary.
5. In the Parent field, either input the Parent Location directly if you know it or click on the chevrons and choose the option to Open Drilldown. Hit the plus signs and drill down as necessary until you find where your new Location fits in the hierarchy as a child and click on the blue box.





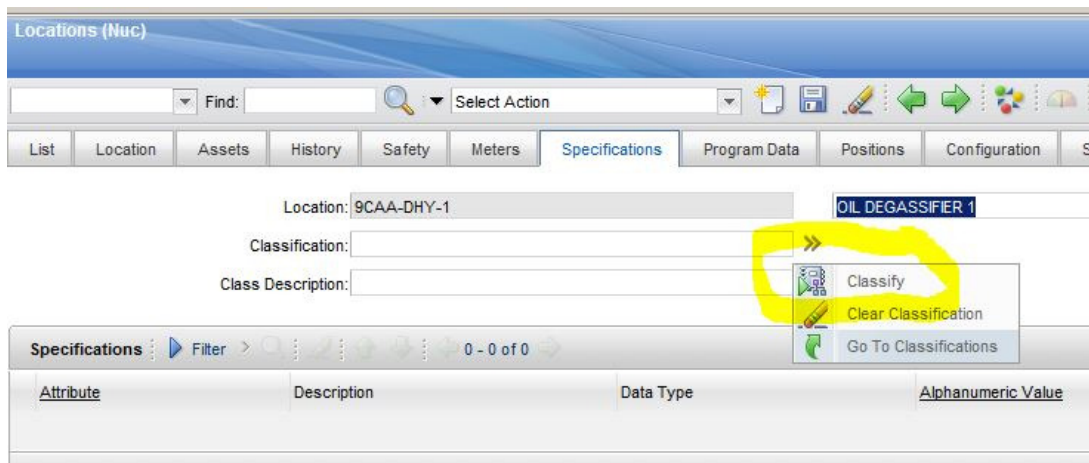
6. Click Ok and you should now see your selection displayed in the Parent band on the screen.

7. Click the “Change Status”  icon on the toolbar, change the status to Active, and click Ok. This saves the record in the process.

Option 2 continued: Classifying the Location

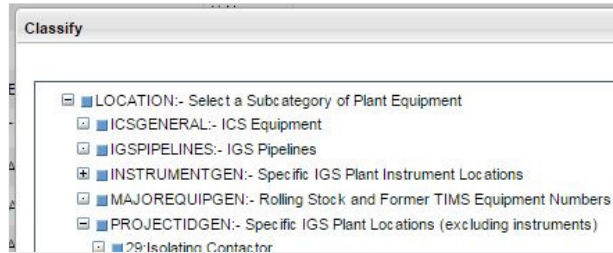
Note: This step is not required for Locations that are used for Tagging System isolation points

1. Click on the Specifications tab then click on the chevrons on the Classification field and choose Classify.



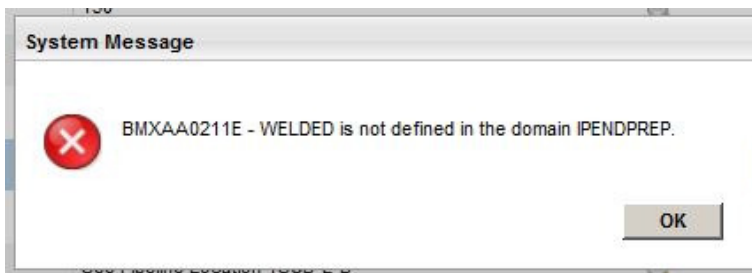
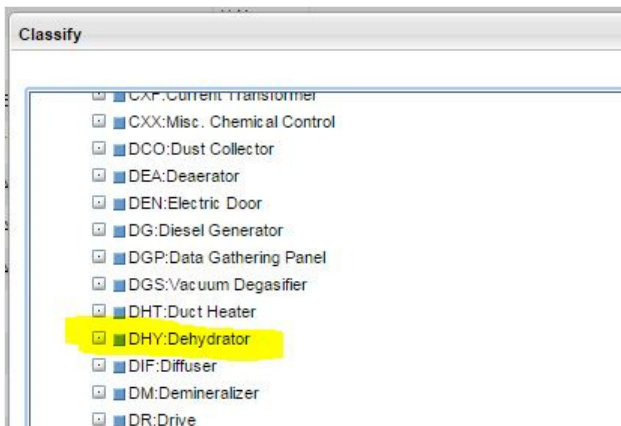
2. Click on the + sign on Location root option to select a subcategory of Plant Equipment which are:
 - a. ICS Equipment
 - b. IGS Pipelines
 - c. Plant Instruments which has a + sign to further drop down to pick instrument type classifications
 - d. Rolling Stock & Former TIMS Equipment Numbers

- e. Plant Equipment other than instruments which has a + sign to further drop down to pick specific plant equipment classifications. These follow the Black and Veatch “Function Code” protocol which is the middle part of a Location ID between the two dashes. For example “FS” is the classification for a “Flow Switch”.



- 3. Select the Classification by clicking on the little blue square that matches the type of component you’re adding whether they are instruments or other typical Project IDs. For mobile equipment use classification MAJOREQUIPGEN.

Enter attribute values as needed in the column titled “Alphanumeric Value”. Note that all of the fields accept alphanumeric data but some fields constrain the input using domain values to compare against. For example if you typed in the value of “WELDED” in the “End Preparation” attribute field of a valve you would receive an error message like that found below. That is because that value is not associated with the valid options that can be used. Instead click on the magnifying glass to right of the field and choose from the acceptable values list.



- 4. Click on the Save icon to save the record and click back on the Location tab.

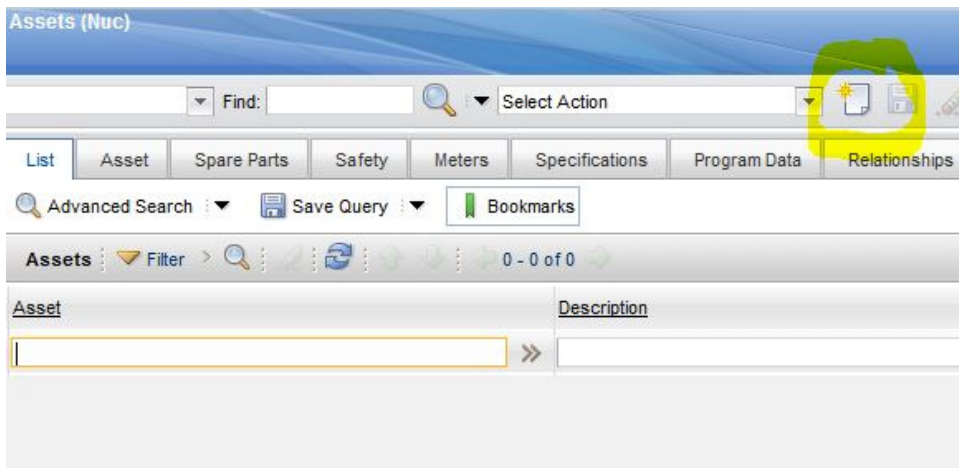
Creating the Related Asset

Note: This step is not required for Locations that are used for Tagging System isolation points

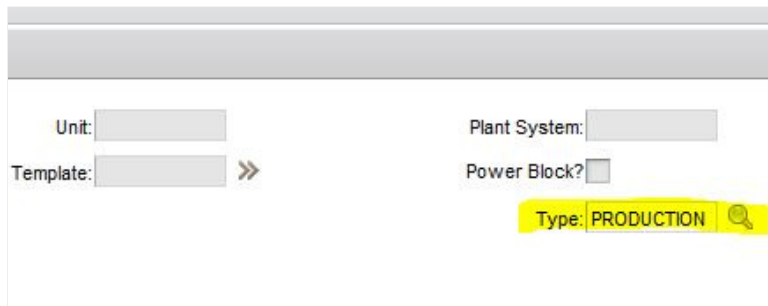
A Location is where the work history is associated in Maximo. There are also two types of assets associated with Locations. The first type is physical tangible rebuildable Items called Rotating Assets which exist in the Location and are serialized with an Asset ID. For example a Pulverizer Location is one Location but will have an Asset of a gearbox and another Asset of a motor physically installed at this Location. The full discussion of Rotating Items is beyond the scope of document.

Another type of Asset is the place where the spare parts are listed, viewed, and printed from. We create an Asset with the same ID as the Location when the Location is created. This will become the container for the Bill of Materials as it evolves. The following steps are required to create this associated Asset.

1. Mouse drag over the Location ID just created and copy it to the Windows clipboard with Ctrl-C.
2. Launch the Assets (Nuc) application found under the Go-to Assets menu.
3. Click on the “New Asset” icon located next to the Select Action drop down menu.



4. Either paste the value from the clipboard using Ctrl-V or in upper case enter the new Asset ID and Description. Use the Long Description icon if necessary. This should match the Location ID just created.
5. Click on the Select Value icon in the upper right portion of the screen for the “Type” field and choose “Production”.



- In the Location field, paste again the value from the clipboard with Ctrl-V and press Tab or in upper case enter the same new Asset ID field that is at the top of the screen. This new Asset will contain the spare parts for the Location of the same ID.

The screenshot shows the 'Asset' tab in a software interface. The main form displays the following information:

- * Asset: 9CAA-DHY-1
- Status: NOT READY

Below this is a 'Details' section with several fields:

- Parent: [Empty field]
- Maintain Hierarchy?
- Location: 9CAA-DHY-1 (highlighted in yellow)
- Bin: [Empty field]
- Rotating Item: [Empty field]
- Condition Code: [Empty field]

- You can enter information in the optional white fields if desired.
- Click on the Save icon to save the record. For now Assets do not receive a Classification so there is no need to go to the "Specifications" tab.
- Click the "Change Status" icon on the toolbar, change the status to Active, and click Ok.

The screenshot shows the 'Change Status' dialog box open over the Asset details form. The dialog box contains the following information:

- Asset: 9CAA-DHY-1
- Status: NOT READY (highlighted in yellow) | Not Ready
- * New Status: [Dropdown menu with 'Active' selected and highlighted in yellow]
- Roll New Status to All Child Assets?
- Remove Asset Reference from Active Routes?
- Remove Asset Reference from Active Safety Plans?
- Change the Status of All Associated PMs to Inactive?

The background form shows the 'Change Status' icon on the toolbar highlighted in yellow.

Your new Location is now ready for use in a WO and the new Asset ready to accept a Bill of Materials.