Asset Manager User Guide

Basware P2P 18.2

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1 Asset Manager – Getting Started

P2P Asset Manager helps the organization efficiently manage and track the company's assets. It empowers the company to make intelligent business decisions by managing the life cycle of fixed, physical, and capital assets.

Asset Manager features:

- Manage the complete asset life cycle
- Maintain an audit trail
- Can be fully integrated with the purchasing system or other accounting systems
- Multiple depreciation type calculations
- Ability to apply partial year conventions
- Can maintain multiple financial books
- Work orders can be created for asset maintenance

1.1 Asset Process Summary

Assets follow the general process workflow used for purchasing.

1. Request an asset.
2. Approve asset request.
3. Receive an asset.
4. Register an asset.

1.2 Assets Menu

The **Assets** menu allows easy access to all asset related activities by organizing the tasks in workflow sequence.

Assets Menu Headings and Options

The following table lists each of the Assets submenu headings with the corresponding options and required permissions.

Table 1: Asset Menu Headings and Options

Menu Heading	Menu Options	Required Permission
Manage	My Assets	View All Assets (118)
	Asset List	Manage Assets (81)
	Asset Attributes	Manage Assets (81)
	Depreciations	Manage Asset Depreciation (131)

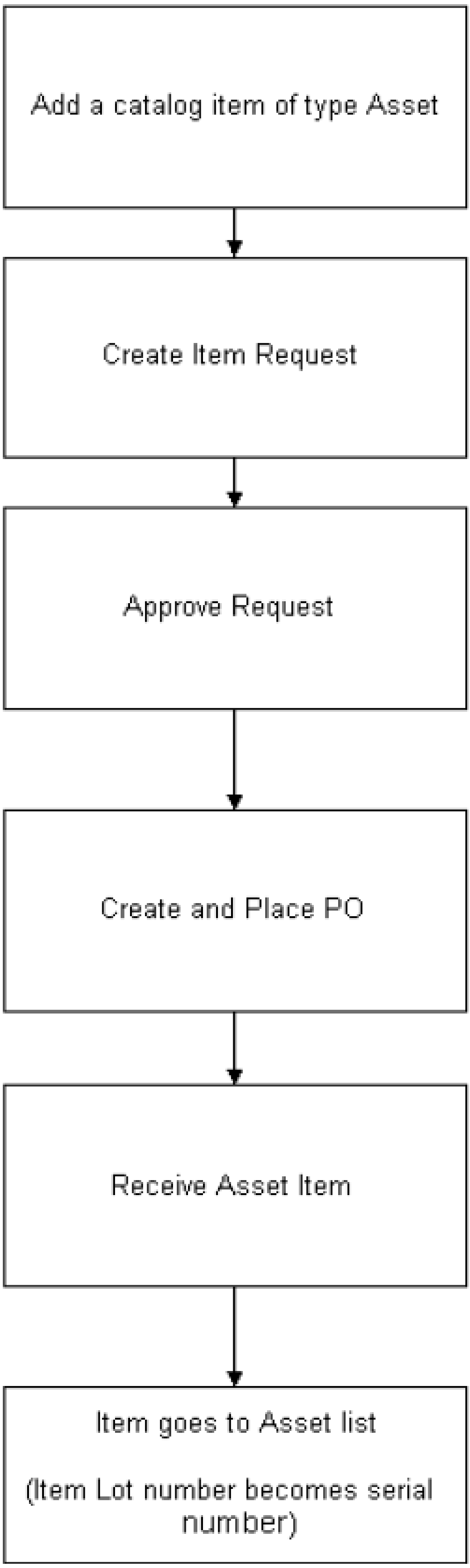
Table 1: Asset Menu Headings and Options (continued)

Menu Heading	Menu Options	Required Permission
Maintenance	Maintenance List	Manage Assets (81) AND Manage Asset Maintenance (121)
WO Requests	Create WO Request	Manage Work Order Requests (124) AND View All Assets (118)
	WO Request List	Manage Work Order Requests (124)
Work Orders	Create Work Order	Manage Work Orders (114) AND View All Assets (118)
	Open Work Orders	Manage Work Orders (114) View All Work Orders (174)
	Approve Work Orders	Approve Requests (1)
	Old Work Orders	Manage Work Orders (114) View All Work Orders (174)
	Service Technician	Manage Work Orders (114) Restrict to Assigned Work Orders (4002)
	Work Order Priorities	Manage Work Order Priorities (134)
	Search WOs	Manage Work Orders (114)
	Scheduling Calendar	Manage Work Orders (114)

2 Asset Setup

The purpose of this chapter is to cover the purchasing process for an asset such as requesting, approval, and receiving from the user's perspective. These steps are similar to the procurement process.

2.1 Typical Asset Acquisition Process



2.2 Order Assets from Catalog

Location: Requisitions > Request/Shop > Search Catalog

Requesting an asset follows the same process as requesting an item from the catalog. You can perform a search, put the needed quantity in the quantity field, and submit the request. An asset may follow a different approval route that is designed within the system. You can also do an advanced search for assets from the item type drop-down field.

To search for assets and create an order request:

1. Click the **Advanced Search** tab.
2. Select **Asset** from the *item type* drop-down field.
3. Click **Search Items**.
4. Enter a quantity for the assets being requested and click **Add Items To Request**.
5. Review the items in the Shopping cart and click **Finish Request**.
6. Complete the required fields and click **Create Order Request**.

You can also use simple search or browse to search for assets. For further details, refer to *Purchase Manager User Guide - Catalog Search*.

2.3 Associate Items to Assets

You can associate items on a request to an existing asset item. This feature is helpful when tracking the items for maintenance costs.

Required Permission

- Associate Request with Assets (120)

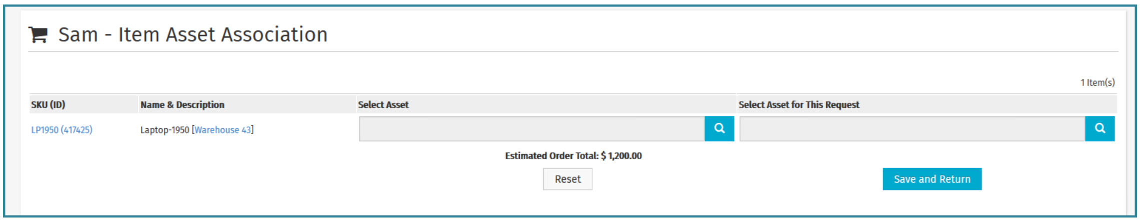


Figure 2: Associate Line Items with Assets Page

Table 2: Associate Line Items with Assets Page Column Definitions

Column	Definition
Select Existing Asset	This column is used to associate the line item with an asset that exists in the system. Clicking the magnifying glass icon and selecting *all* displays all the assets.

Table 2: Associate Line Items with Assets Page Column Definitions (continued)

Column	Definition
Select Asset on this Request	This column is used to associate line items with an asset item on the current request. This is used if the users are buying several sub parts or components along with the asset and the total cost of the asset reflects the costs of the subcomponents as well. Clicking the magnifying glass icon and selecting *all* displays only assets that exist on the current shopping cart.

2.3.1 Associate OR Line Items to Existing Assets

Location: Shopping Cart. Ensure you have the parts you wish to order in the cart. Additionally, the following permission is required:

- 120 - Associate Request with Assets

This option is used when purchasing items required for the maintenance of existing assets, such as spare parts. Associating the additional parts to the original asset helps track the entire maintenance cost over the life of the asset.

To associate a line item to an asset:

1. From the shopping cart, click **Special Functions** > **Associate Assets**.
2. Click the **Search** icon in the **Select Existing Asset** column for that line item to be associated to an asset.
3. Select the asset item to associate the line item and click **Select**.
4. Click **Save and Return** to return to the Shopping Cart page.
5. Complete the request as usual.

2.3.2 Associate Assets to Other OR Line Items

Location: Shopping Cart. Ensure you have the assets and additional parts you wish to order in the cart. Additionally, the following permission is required:

- 120 - Associate Request with Assets

This is used if the users are buying several sub parts or components along with the asset and the total cost of the asset reflects the costs of the subcomponents as well.

To associate a line item to an asset on the current request:

1. From the shopping cart, click **Special Functions** > **Associate Assets**.
2. Click **Associate Assets**.
3. To associate a line item with an asset on the current request, click the **Search** icon in the **Select Asset on This Request** column for that line item row.
4. Select the asset item to associate the line item and click **Select**.
5. Click **Save and Return** to return to the shopping cart.

6. Complete the request as usual.

2.4 Trade In Assets

Location: Shopping Cart. Ensure the new asset purchase is in the cart.

The trade-in asset feature is used to associate a new asset purchase as a trade-in for an existing asset. Once the new asset is received, the system automatically disposes the traded-in asset.

To trade in assets:

1. From the shopping cart, click **Special Functions** > **Trade-In Asset**.
2. Click the **Search** icon in the **Select Trade-In Asset** column for that line item row.
3. Select the asset item that needs to be traded, and click **Select**.
4. If needed, associate the cost for disposing the traded asset in the **Disposal Cost** field, and click **Save and Return** to return to the shopping cart.

2.5 Approve Asset Requests

Rules can be created to change the workflow of order requests to streamline further the asset requesting process. Approval managers have the ability to either approve or decline order requests created by users.

The approval process via header, detail, and/or email functions the same way as for order requests. For information on approvals, refer to *Purchase Manager User Guide, Chapter 5 - Request Approval*.

Requirements

The following permission is required to complete approval tasks:

- 1 – Approve Requests

2.6 Receive Assets

Once you create a purchase order and the asset item is delivered, you must receive the item into the system. When you receive an asset into the system, you might be required to enter some attributes upon receipt. The attributes have been defined at the item level.

When a new asset is created during the receipt of a PO, the system automatically sets the asset category of the new asset as the category associated with the item category for the asset being created. If no asset category is specified for the item category, the system uses the default asset category. If the system is configured to do so, then the items being received can be received as assets when the checkbox is checked on the Receiving page. The system limits you to receiving a maximum of 500 assets per receiving. If you are receiving more than 500 assets, we recommend that partial receipts are performed until all assets have been received. If the item being received is already an established asset, the checkbox is checked by default and cannot be unchecked.

When assets are received from the vendor via a purchase order, the receipt information is stored in the Assets table. The asset receipt information is not affected by returns, transfers, shipments, etc.

Requirements

The following permission is required to set asset attributes when receiving as asset item.

- 119 – Establish Assets on Receiving

2.6.1 Receive Asset Items from Order Requests

Location: Requisitions > **Receive** > **Receive Order Requests**

To receive an asset item from an order request:

1. Locate and select the order request to be received.
2. Click **Receive**.
3. Enter the number of items received in the **Received** field.
4. Check the **Receive as an Asset** checkbox.

The **Receive as an Asset** checkbox is checked by default and noneditable if the ordered item is already established as an asset.

If the ordered item is a product item, then the item can be changed to an asset by checking this box and setting additional attributes if you have permission 119.

5. Enter the *packing slip number* in the **Receiving Reference Document** field.
6. Click **Process Items**.

2.6.2 Receive Asset Items from Purchase Orders

Location: Purchase Orders > **Receive** > **Receive Purchase Orders**

To receive an asset item from a purchase order:

1. Locate and select the purchase order to be received.
2. Click **Receive**.
3. Enter the number of items received in the **Received** field.
4. Check the **Receive as an Asset** checkbox.

The **Receive as an Asset** checkbox is checked by default and noneditable if the ordered item is already established as an asset.

If the ordered item is a product item, then the item can be changed to an asset by checking this box and setting additional attributes if the user has permission 119.

5. Enter the *packing slip number* in the **Receiving Reference Document** field.
6. Click **Process Items**.

For further details on receiving, refer to *Purchase Manager User Guide - Chapter 7*.

2.7 Change Asset Cost During Invoicing

Assets are created when they are received for a purchase order. The asset cost is based on the purchase order unit cost. However, the vendor can invoice the assets at a different unit cost which can increase or decrease the actual purchase cost of the asset. This price change must be reflected on the asset to help with proper depreciation calculation that is based on the actual cost of the asset.

Update Asset Cost

You can update asset costs on the invoice in the following scenarios:

- Change in the invoice cost of the asset is approved from any of the invoice work queues after the pre-process work queue
- Change in the invoice cost of the asset falls under the tolerance limit defined in the system
- Change in the invoice cost of the asset is approved during financial discrepancy
- Change in the invoice cost of the asset is approved from financial discrepancy using the short pay option

Asset cost updates use the following formula:

Asset Cost = Existing Asset Cost + (Asset Invoice Cost – Asset PO Cost)

Revert Asset Cost

Asset costs can be reverted for the following scenarios:

- An invoice with assets is voided from the View PO page
- An invoice with assets is voided from the Manage Invoice page
- An invoice with assets is declined from an approval work queue
- An invoice with assets is declined from any of the other work queues after the pre-process work queue and before the approval work queue.

The change in the asset cost can be calculated using the following formula:

Asset Cost = Existing Asset Cost - (Asset Invoice Cost – Asset PO Cost)

3 Work Order Management

The system provides additional automation and control by using work order management with the procurement process.

Work order management enables you to perform the following tasks:

- Create a work order request for an asset or without an asset
- Create a work order based on a request
- Create work orders for assets or non-assets
- Track work orders using status
- Analyze the total cost of an asset based on work order data
- Order parts needed for work order completion
- Assign labor sources and record labor costs for a work order
- Analyze organizational spending using custom reports created with new asset datasets

3.1 Work Order Functionality Overview

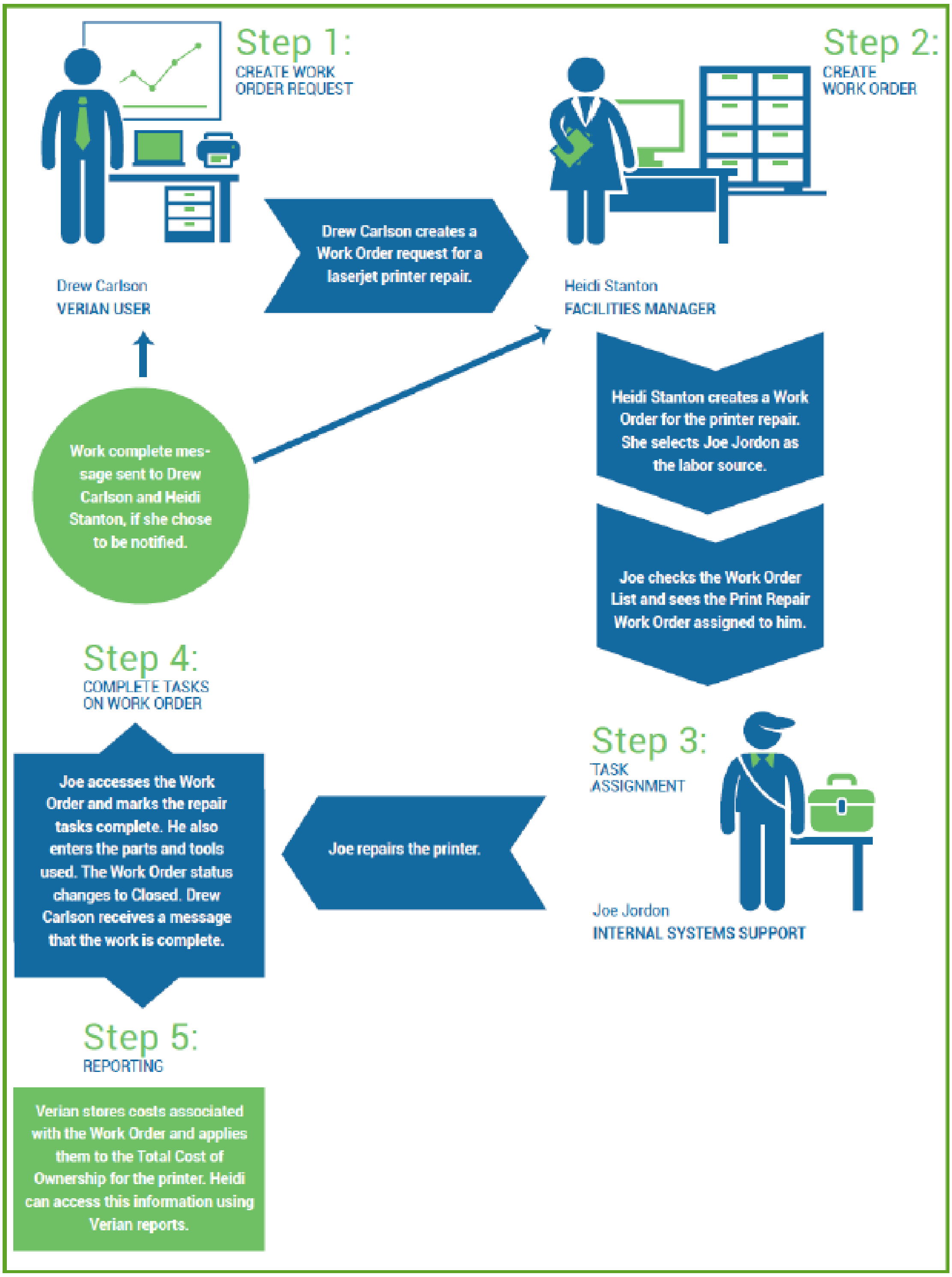


Figure 3: Workflow Illustration

Workflow Variations

The following workflow possibility is also available:

- Heidi talks to Drew in the hall and learns about the printer issue. She creates a work order without receiving a work order request.

3.2 Service Technicians

The system is designed for service technicians to be able to view open and closed work orders assigned to them via the management grids. The system has reserved permission *4002 – Restrict to Assigned Work Orders* for the service technician concept.

When a service technician user or group is assigned permission *4002 – Restrict to Assigned Work Orders* and permission *114 – Manage Work Orders*, the Manage Open Work Orders grid and the Manage Closed Work Orders grid have different features.

On the Manage Open Work Orders grid, the **Add** and **Edit** icons are not available, and the More Actions drop-down includes the following:

- Complete
- Cancel
- Close
- Update Labor Details
- Update Parts
- Print Preview

On the Manage Closed Work Orders grid, the More Actions drop-down includes the following:

- Copy
- Print Preview
- Reopen

A service technician does not have the ability to create a new work order in the system.

If service technicians are assigned work orders for multiple locations, **do not assign them permission 175 – Restrict Work Orders/Work Order Requests to Default Location**. Users assigned this permission can only see work orders assigned to their default location (ship-to location).

3.3 Work Order Requests

A work order request is a record requesting that work such as repair or maintenance be performed, oftentimes for an asset (but not always). Requests are typically initiated by users in the field and sent to the work order manager. The work order manager assigns the tasks to an internal user or an external vendor.

Requirements

The following permissions are required to be able to create work order requests:

- 124 – Manage Work Order Requests

At least one of the following permissions are required to be able to create work order requests for assets:

- 81 – Manage Assets
- 111 – Restrict Asset Management to Selected Locations
- 112 – Restrict Asset Management to Selected Asset Categories
- 118 – View All Assets

At least one of the following restrictive permissions are required if the users are to have access to all the assets:

- 122 – Restrict View Assets to Default Location Assets
- 129 – Restrict View Assets for Selected Locations
- 170 – Restrict View Assets to Selected Asset Categories
- 171 – Restrict View Assets to Own Assets

Users with permission *175 – Restrict Work Orders/Work Order Requests to Default Location* are only able to see work order requests for their default location (ship-to location).

Create Work Order Request from Quick Access Carousel

Asset restrictions can be applied using the following permissions:

- 122 – Restrict View Assets for Default Locations
- 129 – Restrict View Assets for Selected Locations
- 170 – Restrict View Assets to Selected Asset Categories
- 171 – Restrict View Assets to Own Assets

Table 3: Work Order Request Status Definitions

If the status is…	Then the work order request…
Draft	has been saved
New	has been created
Canceled	has been canceled by the user who created it or a user with permission *114 – Manage Work Orders* Work order requests can only be canceled if they have a status of new or draft.
In Progress	has a work order associated with incomplete tasks

Table 3: Work Order Request Status Definitions (continued)

If the status is…	Then the work order request…
Closed	is closed because the tasks on the associated work order are complete

3.3.1 Create Work Order Requests

To create a work order request:

1. From the Dashboard, click **Service Request** under Service in the Quick Access panel.
2. In the **Keyword Search** field, enter the keywords for the *work order type* you are searching for, or use the **Work Order Types** drop-down menu to select the work order type.
3. Click Go.
4. Complete the required fields and enter any additional information.
5. Remember to select an asset if this work order request is tied to an asset.
6. Click **Click to add attachment** to include a file if needed or required. Depending on the work order type selected, an attachment may or may not be required.

   The work order request can be saved as a draft when a required attachment has not been attached. However, users are not able to move to the next step or finish the work order request until the required attachment is attached.

7. Click **Save as Draft** if the work order request is not ready to be submitted or if additional attachments need to be included.

   Work order request drafts are located in the Manage Work Order Request grid. Select the draft and click the **Edit** icon to complete the draft.

8. If **Next** is displayed, there are attribute types assigned to the work order category associated with the work order request. These attributes types need to be completed before the work order request can be submitted. Click **Next** to complete the attribute types associated with this work order request.
9. Click **Finish** to complete the work order request if **Finish** is displayed.

Refer to the Auto Generate Work Order section for information regarding how work orders are auto generated.

3.3.2 Create Work Order Requests with Assets

Location: Assets > **WO Requests** > **Create WO Request**. Additionally, the asset you want to associate the work order to must be present in the system.

You can associate work orders with assets in the system. This is particularly useful for tracking maintenance costs related to work performed on the assets.

To create a work order request with an associated asset:

1. Complete the required fields and enter any additional information.
2. Click **Asset** lookup to open the list of available assets in a modal.
3. Use the filter to narrow down the selection. Refer to Add Assets to a Work Order for more information.
4. Select the asset and click **Submit**. Only one asset can be selected at a time.
5. Attach file if needed or required, depending on the work order type. The work order request can be saved as a draft when a required attachment has not been attached. However, users are not able to move to the next step or finish the work order request until the required attachment is attached.
6. If **Next** is displayed, there are attribute types assigned to the work order category associated with the work order request. Complete these attributes before submitting the work order request.
7. Click **Save as Draft** if the work order request is not ready to be submitted or if additional attachments need to be included.
8. Click **Finish** to complete the work order request if **Finish** is displayed.

Refer to the Auto Generate Work Order section for information regarding how work orders are auto generated.

3.3.3 Edit Work Order Requests

Location: Assets > **WO Requests** > **WO Request List**

Requests with the status of in progress cannot be edited.

When the work order request status is new and the work order category has been defined, the work order category cannot be edited.

To edit a work order request for an asset:

1. Select the work order request to be edited, and click the **Edit** icon .

2. Follow the steps in Create Work Order Request from Quick Access Carousel to complete the request.

3.3.4 Cancel Work Order Requests

Location: Assets > **WO Requests** > **WO Request List**.

Work order requests can only be cancelled by the user who created it or a user with permission 114 – Manage Work Orders. Work order requests can only be cancelled if they have a status of new or draft.

To cancel a work order request:

1. Select the work order request to be canceled.
2. Click **More Actions** and in the drop-down select and click **Cancel**.
3. Click **OK** on the pop-up verification window.

3.3.5 View Work Order Requests

Location: Assets > **WO Requests** > **WO Request List**

To view the details of a work order request:

Click the **Number** link in the of the Manage Work Order Requests grid for the work request you want to view.

The work order request is displayed. If desired, you can add attachments to the work order request from this view.

3.3.6 Auto Generate Work Order

Work orders can be configured to automatically generate when you create the work order request; this is determined by the selected work order type. When you click **Finish**, the system uses the following approaches to determine the appropriate vendor:

1. If an asset is associated to the work order request, and the asset is within its warranty window, then the system creates the work order using the asset's warranty vendor.
2. If an asset is associated to the work order request, and the asset has a service vendor assigned, then the system creates the work order using the asset's service vendor.
3. If one vendor is associated by work order type or work order location, then the system creates the work order using that vendor. If the work order type and location result in an association with more than one vendor, a work order is not auto-generated.

3.4 Work Orders

Enables users to create work orders for tasks involved in asset maintenance and repair.

A work order is a record that lists all of the information related to completing a specific repair or maintenance activity on an asset. Work orders can include the following information:

- Attachments
- Parts (catalog items)
- Tools (other Asset items)
- Labor Sources (departments, employees, and vendors)
- Tasks (description of task to be done for the Asset)

Requirements

You must have one of the following permissions to access the Manage Work Orders page.

- 114 – Manage Work Orders
- 118 – View All Assets
- 174 – View All Work Orders

Work Order Statuses

The following work order statuses may occur during the open work order work cycle:

Table 4: Work Order Statuses

If the status is…	Then the work order…
Draft	has been started and saved as a draft by the user. It cannot be sent for approval or placed with a vendor until the work order is created from the draft.
In Approval	has been sent for approval.
Approved	has been approved.
Placed	has been sent to a vendor.
Confirmed	has been confirmed by a vendor.
In Progress	has been edited. does not have all tasks complete.
Closed	has been edited and all tasks are complete. Work orders are automatically change to closed status when all of the tasks are complete.
Cancelled	has been cancelled by a user with manage work order permission.

Open Work Order Management

In the Manage Open Work Orders grid, you can only perform the following actions if the work order has been approved:

- Update Labor
- Update Parts
- Deliver
- Mark as Placed
- Mark as Confirmed

Work orders can be fully edited only after they have been approved, and if you have permission *114 – Manage WOs*. If the work order is copied, the newly created work order is in draft status and is editable.

With permission *4002 – Restrict to Assigned Work Orders*, you can only manage and view work orders that are assigned to you in the **Labor** field.

3.4.1 Create Work Orders

Location: Assets > **Work Orders** > **Open Work Orders or Create Work Order**

To create a work order:

1. Click .
2. Complete the fields as needed. If the work order is being created from a request, many of the fields are already filled out. The fields listed below are required.
   - Work Order Priority: This information helps the service technicians manage the work orders. This list is customer specific.
   - Work Order Name
   - Work Order Type
   - Not to Exceed Amount: For an unlimited amount, enter 0. Once you create the work order, you cannot change this amount.
   - Location
   - Vendor: Vendors displayed are based on the work order type and/or location selected.
   - Description
   - Contact Name
   - Tasks: The work order must have at least one task. If a task is not entered while adding a work order, one must be entered during a later edit. A work order must have a completed task for the status to change to complete.
3. To save the current info and return at a later time to complete the work order, click **Save Draft**. All required fields must be completed before saving as a draft.
4. When all information is included, click **Create Work Order**.

The work order is created. Notifications are sent to the work order creator and backup user as determined by system configuration.

3.4.2 Search for Work Orders

Location:Assets > **Work Orders** > **Search Work Orders**

The work order search simplifies the process of looking for work orders, enabling users to search quickly and easily for required work orders. Work orders can be searched based on *location*, *vendor*, *type of WO*, *status of WO*, *WOs in a date range*, etc.

To search for a work order:

1. Enter the criteria for the search using the available fields.
2. Click **Search WO**.

3.4.3 Edit Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**.

You can edit many of the fields that were defined when you created the work order. Additionally, you can add information on labor performed, parts ordered or withdrawn, tools used, attachments, or notes.

To edit a work order:

1. Select the work order to edit and click .
2. Edit the necessary fields.

   Existing assets on the **Asset** section can be deleted as long as there are no associated labor entries.

3. Click **Update Work Order**.

3.4.3.1 Add Assets to Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

To add assets to an existing work order:

1. Select work order for which assets are to be added or edited and click or edited and click the **Edit** icon .
2. In the **Assets** section, click **Add Asset** to the far right.
3. Click **Update Work Order**.
4. Select the assets to be added and click **Submit**.

To delete an asset from the work order, click .

3.4.3.2 Add Tasks to Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

A work order must have at least one task added to it before it can be closed.

To add tasks to a work order:

1. Select work order for which assets are to be added or edited and click .
2. In the **Tasks** section, Click **Add Task** to the far right.
3. Enter the task to be performed on the work order in the **Task** field.
4. To mark a task complete, check the **Complete** checkbox for that line item and click **Update** or **Update and Return** if the user is to return to the Edit Work Order page.

To delete an added task, check the **Delete** checkbox for that line item and click **Update** or **Update and Return** if the user is to return to the Edit Work Order page.

3.4.3.3 Add Labor Performed for Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

For service types to appear in the Service Type list, they must first be added as an item in the catalog and the **Item Type** must be service.

To add labor for a work order:

1. Select the work order for which labor is to be added or edited and click .
2. In the **Labor** section, click **Add Labor Details** to the far right.
3. Complete the required fields.
4. Click **Add**.
5. To return to the **Manage Open Work Order** grid, click **Return to Work Order**.

3.4.4 Scheduling Calendar

The **Start Date** field when adding/editing a work order utilizes an advanced calendar look up. The scheduling calendar allows the work order coordinator to select the appropriate date for the vendor and/or service technician assigned to do the labor to begin based on the assignment of other work orders and the locations of the assigned resource. The calendar helps provide optimal scheduling of resources and minimizes travel time and distances between various locations.

For each date on the calendar, the system displays the *work order ID*, *work order name*, and *location name* for up to three scheduled work orders. If there are additional work orders scheduled for that day, the calendar displays a **[More…]** link. Click the **[More…]** link to expand the calendar cell to view all the scheduled work orders.

Hover over the work order and the work order description is displayed.

Click the **Work Order** link to view the work order details.

Users with permission *114 – Manage Work Orders* can access the scheduling calendar as a menu item under **Assets** from the menu bar. The **Scheduling Calendar** menu item allows users to view the work order calendar without having to access the Add/Edit Work Order pages.

Table 5: Scheduling Calendar Control Panel Action Definitions

Action	Definition
Refresh	When updates are made to any of the fields in the control panel, **Refresh** must be clicked for the calendar to be refreshed.
Schedule	When any changes are made to the Start Date, End Date, Vendor, and/or Service Technician fields and Schedule is clicked, the calendar is updated.
Include Closed Work Orders	The scheduling calendar displays only open work orders by default. When **Include Closed Work Orders** is selected, the calendar displays closed work orders as well. Canceled work orders are never displayed on the calendar.

Table 6: Scheduling Calendar Control Panel Field Definitions

Field	Definition
Date	This is a read-only field that displays the currently selected start date and end date. Clicking a date on the calendar changes the start date. The end date may change based on the resolution hours determined by the selected work order priority. The end date is changed on the Add/Edit Work Order page and can be controlled by priority's default resolution hours.
Vendor	The **Vendor** field defaults to the vendor selected when the work order is created. If a vendor was not selected when the work order was created, the system defaults to the vendor specified by system configuration. When accessing the scheduling calendar through **Edit**, the **Vendor** field is non-editable. This field is required. When **Schedule** is clicked, the information on the work order is updated.
Service Technician	The **Service Technician** field defaults to the technician selected when the work order is created. If a technician was not selected when the work order was created, the system defaults this field to you, the current user. If you are assigned permission *4002 – Restrict to Assigned Work Orders*, this fields defaults the user's name and is a non-editable field. This is a required field. When **Schedule** is clicked, the information on the work order is updated.
Location	Allows you to select the work order locations to display on the calendar. If you have permission *116 – Restrict Work Orders/Work Order Requests by Location*, only the selected locations for that permission are available. If you have permission *175 – Restrict Work Orders to Default Location*, you may only access your default location (ship to).
Work Order Category	Lists all the enabled work order categories.

Table 6: Scheduling Calendar Control Panel Field Definitions (continued)

Field	Definition
Location Group	Lists the work order location groups to display on the calendar. If you have permission *116 – Restrict Work Orders/Work Order Requests by Location*, only the location groups associated with the selected locations are available. If you have permission *175 – Restrict Work Orders/Work Order Requests to Default Location*, only the location group associated with your default location is available.
Work Order Type	Lists the enabled work order types. If you have permission *128 – Restrict Work Orders/Work Order Requests by Work Order Type*, only the selected work order types are available.

The scheduling calendar does not allow users to directly specify the end date. The user is only able to select/edit the start date. However, the end date is updated based on the value selected in the **Add/Edit Work Order** page. The scheduling calendar does not allow you to modify the Start Time and End Time fields. You must update these fields directly on the **Add/Edit Work Order** page.

When you create a new work order, the **Start Date** field defaults to the current date, and the **End Date** field is updated to the correct date based on the resolution hours defined for the selected work order priority.

Example

If the start date is September 30 and the selected priority has 48 hours set for the resolution hours, the end date needs to be October 2.

If you open the scheduling calendar and select a different start date, the end date automatically updates to two days after that start date. If a user selects October 6 as the start date, the end date changes to October 8.

When you manually change the end date to a different number of days other than the number of resolution hours, the calendar maintains the changed number of days. This prevents the user from having to always update the end date when the start date is changed.

Example

If the start date is September 30 and the selected priority has 48 hours set for the resolution hours, the end date needs to be October 2 but you change the end date to October 1. Now when a user opens the scheduling calendar and selects another date to start that work order, that end date is only one day after the selected start date, even though the resolution hours are is set to 48.

The **Select Asset** page is to add assets. Associated assets cannot be deleted from the work order via this page.

3.4.5 Order Parts for a Work Order

System setting *740 – Enable Multiple Request Bins* must be enabled for users to use this feature. If this system setting is disabled, a message is displayed informing users to "select the work order when completing the shopping cart request."

This functionality enables you to order parts used to complete a work order. Parts needed for a work order can be ordered using these options:

- Search Catalog: This option can be used to order items in the catalog.
- Off Catalog Request: If the item does not exist in the catalog, use this option to order the part. Requires permission *36 – Can Create Free Form ORs*.
- Vendor Punchouts: This option can be used to order items from a vendor's online catalog. Requires permission *90 – Can Establish Vendor Connect Sessions*.
- **From the Shopping Cart**: If the items that need to be added to the work order are in the shopping cart, select this option. The multiple shopping carts feature must be enabled for this function to work.

Permissions

- If you have permission *114 – Manage Work Orders*, you can select a work order when completing an order request. You are able to select any work order that is available on the Open Work Order List page. The work orders available to you are determined by a combination of permission *114* and the following permissions:
- 117 – Restrict to own WO/WO Requests
- 128 – Restrict WO/WO Request by WO Type
- 116 – Restrict WO/WO Request by Location
- 136 – Restrict WO/WO Request by Project
- 4002 – Restrict to Assigned Work Orders

All parts in an order request associated with a work order appear in the Edit Work Order page in the Withdrawn Parts section. The parts move to the Ordered Parts section after a purchase order is created from the order request.

Shopping Cart

When system setting *740 – Enable Multiple Request Bins* is enabled and you are completing an order request that originated from **Open Work Order List > Edit > Ordered Parts > Work Order Shopping Cart**, the system defaults the work order name in the **Work Order** field on the **Create Order Request** page. You can select a different work order or deselect the work order. However, if you do this the following happens:

- If you select a different work order, the parts on the order request are associated with the selected work order.
- If you deselect the work order, the parts on the order requests are not associated with a work order. The order request is a standard order request.

When system setting *740 – Enable Multiple Request Bins* is disabled and you are completing a request for work order parts from the standard shopping cart, you need to select a work order name in the **Work Order** field on the **Create Work Order Request** page. When a work order name is selected, the ordered parts are associated to that work order. If a work order is not selected, the order request is a standard order request.

In the **Work Order** field on the **Create Order Request** page, the work order ID is displayed before the work order name.

Default Ship-To Location

When you create a shopping cart for a work order from **Assets > Open Work Order List > Edit > Ordered Parts > Work Order Shopping Cart**, the work order shopping cart's ship-to location defaults to the work order's location. That is, if you have permission to ship to the work order's location – this is based on your default ship-to location and locations selected for permission *14 – Can Change Ship-To Location during Requesting*. If you are not allowed to ship to the work order's location, the shopping cart defaults to your default ship-to location.

If configured to do so, the system requires you to select the ship-to location when completing the order request.

If you edit the shopping cart and selects a different ship-to location, the **Create Order Request** page defaults to the location you selected.

Work Order Location Account Code Expansion Formula

When items are added to the work order shopping cart and the **Account Code** field is configured to use an expansion formula that uses LocationCode, the system uses the work order location for the LocationCode instead of your ship-to location. This affects the account code based on the location the work order parts are charged to and not the location the parts are actually shipped to.

3.4.5.1 Order Parts from the Catalog

Location: Assets > **Work Orders** > **Open Work Orders**. Additionally, the work order the parts must be associated to must already be created.

To order parts from the catalog:

1. Select the work order for the parts to be added or edited and click .
2. In the **Ordered Parts** section, click **Add Parts** to the far right.
3. Click the **Search Catalog** link.
4. Search for the items needed for the work order and place them in the work order shopping cart.
5. Once all the items (catalog, off catalog, and Vendor Punchout) are in the shopping cart, create the order request.
6. Once a purchase order is created, the items are added to the **Ordered Parts** section of the **Edit Work Order** page.

3.4.5.2 Order Parts Using Off Catalog Request

Location: Assets > **Work Orders** > **Open Work Orders**. Additionally, the work order the parts must be associated to must already be created.

To order parts using off catalog:

1. Select the work order for which parts need to be added or edited and click .
2. In the Ordered Parts section, click **Add Parts** to the far right.
3. Click **Off Catalog Request**.
4. Complete the required fields (Refer to the *Purchase Manager User Guide - Chapter 4* for further details) and create the off catalog request.
5. Once all the items (catalog, off catalog, and Vendor Punchout) are in the shopping cart, create the order request.

Once a purchase order is created, the items are added to the **Ordered Parts** section of the **Edit Work Order** page.

3.4.5.3 Order Parts Using Vendor Punchouts

Location: Assets > **Work Orders** > **Open Work Orders**. Additionally, the work order the parts must be associated to must already be created.

To order parts using Vendor Punchouts:

1. Select the work order for which parts need to be added or edited and click .
2. In the Ordered Parts section, click **Add Parts** to the far right.
3. Click **Vendor Punchouts**.
4. Take the steps needed to complete a Vendor Punchout request.
5. Once all the items (catalog, off catalog, and Vendor Punchout) are in the shopping cart, create the order request.

Once a purchase order is created, the items are added to the **Ordered Parts** section of the **Edit Work Order** page.

3.4.5.4 Order Parts from Shopping Cart if Multiple Shopping Carts Are Disabled

Location: Shopping Cart

To order parts directly from the shopping cart:

1. Add all desired items (catalog, off catalog, and Vendor Punchout) to the shopping cart and click **Finish Request**.
2. Complete all the required information.
3. In the **Work Order** field select the work order for the parts on this request to be associated with.
4. Click **Create Order Request**.

Once a purchase order is created, the items are added to the **Ordered Parts** section of the **Edit Work Order** page.

3.4.5.5 Withdraw Parts from Warehouses

Location: Inventory > **Withdraw Items** > **Withdraw Items**.

Before beginning the withdrawal process, record the name of the work order with which the withdrawn part is to be associated.

To withdraw parts from a warehouse and associate them to a work order:

1. From the Dashboard, click **Inventory** on the menu bar.
2. Under the **Withdraw Items** menu group, select and click **Withdraw Items**.
3. On the Search page, select the **Warehouse** from which you are withdrawing items. Then search for items by category using the drop-down menu to the left or search by keyword.
4. Click .
5. Locate the desired item and enter the **Quantity**, ensuring you stay within the **Available Quantity** displayed with each item. Click **Add Items to Request**.
6. To make any changes, click **Revise Request**. To delete an item, check the Delete box to the right of the line item and click **Clear Entries**.
7. Once all items are correct, click **Start Withdrawal**.
8. It is also recommended that the withdraw is revised after items from previous order requests are copied to it. This retrieves the most recent pricing and recalculates the totals. This happens automatically when the user finishes the request. It is important to select the appropriate warehouse prior to revising; otherwise, the selection does not take place.

   The user can use the **Back** action on the browser in order to return to the previous page and make an adjustment to the line item in error.
9. Complete the required fields on the Direct Item Withdrawal page.
10. In the Work Order field, click the **Search** icon to display the Work Order pop-up. Use the **Filter** field to search by keyword or the alphabetical navigation at the top of the pop-up to find the name of the work order. Once you have selected the work order, click **Select**.
11. When an order request is created from a work order (by ordering parts), a **Reference** link to the associated work order is located on the pages listed below. The **Reference** link redirects the user to the View Work Order page for the work order associated with the selected order request.

    Click **Process Withdrawal**.

3.4.5.6 Track Parts Ordered Externally

Location: Assets > **Work Orders** > **Open Work Orders**

The system captures parts used on the work order that are ordered externally.

To add parts not ordered through the system:

1. From the Dashboard, click **Assets** on the menu bar.
2. Select and click **Open Work Orders** under the **Work Orders** menu group.
3. Select the work order for which parts are to be added or edited and click .
4. In the **Other Parts** section, click **Add Parts** to the far right.
5. Complete the required fields and click **Update** to add more parts or click **Update and Return** to return to the **Edit Work Order** page.

3.4.6 Add Tools to Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

To add tools to an existing work order:

1. Select the work order for which tools are to be added or edited and click .
2. In the **Tools** section, click **Add Tools** to the far right.
3. Click in the **Tool Name** field.
4. Select the desired tool from the list and click **Select**. You can browse for tools or enter search terms in the **Filter** field and click **Apply Filter**.
5. Check the *used* checkbox for that line item and click **Update** or **Update and Return** if you are ready to return to the **Edit Work Order** page.

To delete an added tool, check the delete checkbox for that line item and click **Update** or **Update and Return** if you are ready to return to the **Edit Work Order** page.

3.4.7 Add Attachments to Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

To add attachments to an existing work order:

1. Select the work order for which attachments are to be added or edited and click .
2. In the **Attachments** section, click **Click to add attachment**.
3. Select the file to be attached using **Browse...**. Enter Notes for the attachment if needed.
4. Click **Attach**.

5. To delete an added attachment, click ☒ beside each attachment to be deleted.

3.4.8 Add Notes to Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

Users can use notes to add comments or other work order information for future reference. Notes do not have a **Reply** functionality.

To add notes to an existing work order:

1. Select the work order for which notes are to be added or edited and click
2. In the **Notes** section, click **Add Note** to the far right.
3. Fill in the **Subject** (if desired – default is “No Subject”) and **Note** fields and click **Submit**.

3.4.9 Add Discussion Notes to Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**.

You can use discussion notes to add additional information or ask questions of other users about the order. Discussion notes can be sent to multiple users, sent to a single user, or simply posted on the order for anyone to view.

To add discussion notes to an existing work order:

1. Select the work order for which notes are to be added or edited and click .
2. In the **Discussion Notes** section, click **Add Note** to the far right.
3. *(Optional)* Choose the users to send the note to. The field uses typeahead functionality, so type the first few letters of the user's name to get a list of possible matches.
4. *(Optional)* Enter a Subject for the discussion note.
5. Enter the discussion note and click **Submit**.

Users with email notifications enabled receive an email notification for all discussion notes for which they are specified as a recipient. The user can click the **Reply** link within the email to be taken directly to the **Reply** modal on the request, after login or SSO authentication.

3.4.10 Copy Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

To copy a work order:

1. Select the work order to copy.
2. Click **More Actions**.
3. In the More Actions drop-down select and click **Copy Work Order**.

Any labor, parts, or items associated with the work order are not copied.

4. Change any necessary information.
5. Click **Update Work Order**.

The new work order is created with the status set to Draft.

3.4.11 View Work Order Print Previews

Location: Assets > **Work Orders** > **Open Work Orders**

To view the work order print preview:

1. Select the completed work order that is to be previewed.
2. Click **More Actions** > **Print Preview**.

3.4.12 Close Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

To close a work order:

1. Select the completed work order that is to be closed.
2. Click **More Actions** > **Close**.
3. Click **OK** on the pop-up verification window.

3.4.13 Cancel Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

To cancel a work order:

1. Select the work order that needs to be canceled.
2. Click **More Actions** > **Cancel**.
3. Click **OK** on the pop-up verification window.

3.4.14 Deliver Work Order to Vendor

Location: Assets > **Work Orders** > **Open Work Orders**.

Work orders must be approved before they can be delivered.

Work orders can be delivered to vendors manually, by email, by Fax, or using Vendor Punchouts. This option is set up in the vendor profile.

To deliver a work order:

Click **More Actions** > **Deliver**.

The work order status can be changed to placed manually by clicking **Mark as Placed**.

The work order status can be changed to *placed* manually by clicking **Mark as Placed**. Once the work order is delivered to the vendor and confirmation is received, the status of the work order can be manually changed to *confirmed* by clicking **Mark as Confirmed**.

3.4.15 Mark Work Order as Placed

Location: Assets > **Work Orders** > **Open Work Orders**

You can manually update the status of a work order; this is useful in scenarios where the work order is delivered manually, and the work order does not reflect the correct status.

To mark a work order as placed:

1. Select the work order that was delivered manually to update its status.
2. Click **More Actions** > **Mark as Placed**.

The status of the work order is changed to *placed*.

3.4.16 Mark Work Order as Confirmed

Location: Assets > **Work Orders** > **Open Work Orders**

You can manually update the status of a work order; this is useful in scenarios where the vendor received the work order and the correct status is to be reflected.

To mark a work order as confirmed:

1. Select the work order that was delivered and received by the vendor to update its status.
2. Click **More Actions** > **Mark as Confirmed**.

The work order status is changed to *confirmed*.

3.4.17 Update Labor Details on Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

Work orders must be approved before labor and parts can be updated.

The update labor function allows the assigned vendor or user to post work performed on the work order.

To update the labor details:

1. Select the work order that the labor details are to be updated.
2. Click **More Actions** > **Update Labor Details**.
3. Complete the required fields.
4. Click **Add**.

3.4.18 Update Parts Details on Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

Work orders must be approved before labor and parts can be updated.

To update the parts details:

1. Select the work order for the parts to be updated.
2. Click **More Actions** > **Update Parts**.
3. Complete the required fields.
4. Click **Update** or **Update and Return**.

3.5 Work Order Approvals

Work order approval management allows you as an approver to manage all work order approval activities from one location. You can filter and sort the order requests in order to approve or decline certain requests. You can either approve or decline requests in their entirety without checking the line items, or perform detail approval based on the line items.

Requirements

The following permission is required to perform approval tasks.

- 1 – Approve Requests

3.5.1 Approve or Decline Work Orders at Summary Level

Location: Assets > **Work Orders** > **Work Orders to Approve**

To approve or decline a work order in full:

1. Search for the work order to approve, using the filter or sort options if needed, and select the work orders to be approved or declined
2. If approving the work orders, click **Approve**.

3. If declining the work orders, click **Decline** and enter a **Reason for Decline** (required).

The work orders are approved or declined and the requesters are notified via email and/or internal notification.

3.5.2 Approve or Decline Work Orders at Detail Level

Location: Assets > **Work Orders** > **Work Orders to Approve**

To approve or decline work orders at the detail level:

1. Select the work order to approve/decline. Only one work order can be selected at a time.
2. Click the **Reference No.** link.
3. If needed, add Tasks, Labor Details, Parts, Tools, or attachments by clicking the corresponding action.

   For more information on these actions, refer to the Editing Work Order section earlier in this chapter.
4. Click **Approve Work Order** or **Decline Work Order**.

3.5.3 Return Work Orders to Previous Approver

Location: Assets > **Work Orders** > **Work Orders to Approve**

When reviewing work orders to approve, you can return a work order to a previous approver for approval. The previous approver then needs to re-approve the work order. The work order is only re-routed to the prior approver, *not* multiple approvers back. Returning the work order to the previous approver cancels the approval that has occurred for this work order.

To return an order request for approval to the previous approver:

1. Select the work orders to be returned to a previous approver.
2. Click **Return**.

3.5.4 Approve Work Orders by Email

If the system is configured to do so, you can approve work orders via email. For approvals via email, the system requires that a valid POP3 and SMTP server be provided to process the work orders and the approval managers' profiles have valid email addresses.

Approvals sent via email display the following:

- Work Order Type
- Work Order Category
- Work Order Number
- Work Order Name
- Work Order Description
- Work Order Location
- Vendor Name
- Not to Exceed Amount

- Work Order Date
- Work Order Note

Requirements

- The correct email address must be set in the user's profile.
- The **Notify Via** field on the user profile must be set to *email* or *both email and internal*.

To approve work orders by email:

1. Once a user creates a work order requiring approval, the work order approval is sent by email to the approver, which contains text as shown above.
   - The approver can click the link sent in the email to log in to the system to approve the work order.
   - Follow the steps mentioned in the email to approve the work order.
2. Once the email is sent, the system processes the email depending on the scheduled task set and the status of the work order is updated.

3.5.5 Edit Approval Routing for Work Orders

Location: Assets > **Work Orders** > **Work Orders to Approve**

Required Permissions

- 1 – Approve Requests
- 75 – Can Add Users to Approval Route

During the course of the approval process, you may find that additional levels are needed for a particular request before final approval. If the approval required is not included in the original workflow, you can add additional approvers in the Approval page. This is a permission-based function, so some users are able to add additional approvers while others are not.

When adding approvers to the route the following conditions apply:

- A new approver can only be inserted after the current active approver.
- The current approver or any previous approver cannot be moved up or down.
- Only the user who added the approver can delete the added approver.
- When there are multiple rules in effect, the selection of the approver under the rule determines where the approver should go in the rule chain. Typically, it is right after the approver next to the green plus icon selected.

To edit the approval routing:

1. Select the work order to approve.
2. Click the work order's **Reference No** to view work order details.
3. Scroll to the bottom of the page to the **Edit Approval Routing** section. Click the icon and select users to add to the approval list from the user list.

   Users in this list have approval permissions.
4. From the pop-up window, select the user to be added and click **Done**.
   The additional user(s) now appears in routing list with status of open.
5. Using and , the list of users can be adjusted to follow a chain routing effect.

6.

Only the user who adds the approvers to the route are able to delete those approvers.

Use ✗! to remove a user that was added.

7.

Only users whose status is in can be added to the approval route. A message is displayed if the user being added to the route does not have the status of in.

The order request status is in approval with the new routing users displayed for the remaining routing when OR is viewed.

3.6 Transfer Work Orders

Transfer Work Orders allow users to transfer assets from location to location or location to warehouse. This is only for assets that are not stocked in any warehouse inventory.

Transfer work orders can only be created from Create Transfer Work Order under the Work Orders menu group. It is recommended that *transfer* is the selected work order type for transfer work order types. The vendor for transfer orders is always a virtual vendor.

Several limitations exist on transfer work order functionality:

- Transfer work orders cannot be copied.
- Once closed, transfer work orders cannot be reopened.

3.6.1 Create Transfer Work Orders

Location: Assets > **Work Orders** > **Create Transfer Work Order**

When the user is viewing the Create/Edit Transfer Work Order page, the *work order type* and *vendor*are display only and cannot be edited. You can specify the destination location or destination warehouse. If you specify both, the warehouse takes precedence.

You can set the condition code for each asset on the transfer work order. The condition codes are defaulted to the current condition code stored for the asset. The condition code update does not take place until you close the transfer work order.

The assets displayed on the Select Asset for Work Order page are filtered to show only the ones that are not stocked in a warehouse. Assets with the status *in transit* are not displayed as well. Also, assets from multiple locations cannot be selected/displayed.

At least one asset must be selected for a transfer work order can be created.

Transfer assets are not billable.

To create a transfer work order:

1. Select the work order priority.
2. Enter the work order name.

3. Select a project if the transfer is associated with a project.
4. Select the destination location or destination warehouse. If you select both, the warehouse takes precedence.
5. Enter the rest of the required and necessary information.
6. If the condition code needs to be updated, change it in the completion condition code column for each asset. The condition code for the assets are updated when the transfer is complete.
7. Add the assets to be transferred. Refer to Add Assets to Work Order for more information regarding how to add assets.
8. If any tasks and labor need to be added, add them.
9. Click **Create Transfer Work Order**.

Transfer work orders can be edited, with the exception of the assets associated with it which are view only. The edit features work the same as a regular work order.

3.6.2 Cancel Transfer Work Orders

Location: Assets > **Work Orders** > **Open Work Orders**

Transfer work orders can be canceled. When **Cancelled** is clicked, the *in transit* flag is removed from the associated assets.

To cancel a transfer work order:

1. Select the transfer work order that is to be canceled.
2. Click **Cancel**.
3. Click **OK** on the confirmation pop-up.

Transfer work orders can be canceled. When **Cancelled** is clicked, the *in transit* flag is removed from the associated assets.

3.6.3 Close Transfer Work Orders

When a transfer work order is closed, the *in transit* flag is removed and the asset condition codes and values for the assets are updated. The new location is assigned as the location of the transferred assets. If a warehouse was selected as the destination location, the asset is established in the warehouse and the inventory cost is the asset cost.

When a transfer work order with assets is closed and the **Set Date in Service** field is set to **Yes** for the receiving location, the system sets the receiving date as the date in service for the asset. The date in service determines when depreciation calculation starts for an asset.

3.7 Old Work Orders

You can access old work orders to reopen them, create invoices, edit, etc.

Requirements

You must have the following permissions to manage old work orders:

- 114 – Manage Work Orders
- 122 – View Selected Assets

Old Work Order Statuses

The following work order statuses are for closed work orders:

If the status is…	Then the work order…
Closed	Has been edited and all tasks are complete. Work orders are automatically change to *closed* status when all of the tasks are complete.
Closed – No Bill	Has been closed with no cost incurred.
Billed	Has been billed as per the labor and order costs.
Canceled	Has been canceled by a user with manage work order permission.
Declined	Has been declined by the approver.

Users who are assigned permission *4002 – Restrict to Assigned Work Orders* are only able to manage and view work orders they are the assigned labor resource for the work order.

3.7.1 Reopen Closed Work Orders

Location: Assets > **Work Orders** > **Old Work Orders**

Transfer work orders that have been closed cannot be reopened.

To reopen a closed work order:

1. Select the work order to be reopened and click **More Actions** > **Reopen**.
2. Click **OK** on the pop-up verification window.

The work order is reopened and is moved from Closed Work Orders to Open Work Orders.

3.7.2 Editing Closed Work Order

Location: Assets > **Work Orders** > **Old Work Orders**

To edit a closed work order:

1. Select the work order to edit and click the **Edit** icon.
2. If the account code or any Udef fields are to be edited, enter the values in the **Account Code** and **Udef 1 – 3** fields respectively.
3. Use the **Add Note** field to add any notes for the work order and click **Add Note**.
4. Click **Update Work Order**.

3.7.3 View Old Work Order Details

Location: Assets > **Work Orders** > **Old Work Orders**

To view a closed work order details:

Click the **ID** of the work order to view.

3.7.4 Copy Old Work Orders

Location: Assets > **Work Orders** > **Old Work Orders**

Transfer work orders cannot be copied.

To copy a work order:

1. Select the work order to copy.
2. Click **More Actions** > **Copy**.

   Any labor, parts, or items associated with the work order are not copied.

3. Complete/change the information in the necessary fields.
4. Click **Update Work Order**.

A new work order is created with the old work order information. The new work order is in *draft* status.

Glossary

Asset

Any possession that has value in an exchange.

Acquisition Cost

Price paid to acquire the Asset.

Book Value

The net value of a Company's Assets, less its liabilities and the liquidation price of its preferred issues.

Depreciation

Accounting methods to take into account an Asset's physical deterioration. It allocates the Asset's cost over its useful life.

Labor

Physical effort a person has to expend to repair, inspect, or deal with a problem. It is expressed in hours, and can be divided by crafts or skills.

Maintenance

Any activity carried out on an Asset in order to ensure that the Asset continues to perform its intended functions, or to repair the equipment.

Parts

All of the supplies, machine parts, and materials to repair an Asset, or a system in or around an Asset.

Priority

The relative importance of a task in relation to other tasks. Ex. A safety problem would come before an energy improvement job.

Salvage Value

Realizable value when disposing the Asset at the end of the useful life.

Scheduled Maintenance

Preventative maintenance carried out over a predetermined interval of time, number of operations, etc.

Task

One line on a task list that gives the inspector specific instruction to do one thing.

Useful Life

The estimated period from the date of acquisition, over which the service potential of the Asset is expected to be used.

Work Order

A written instruction detailing the Work Order to be performed mostly based on a Work Order Request.

Work Order Request

Formal request to have work done. Can be filled out by an inspector during an inspection on a write-up form or by a maintenance user.

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