BUSINESS REQUIREMENTS DOCUMENT



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# Preface

## Document Information

|  |  |
| --- | --- |
| Author | Upender Kuncham |
| File Name | StewardBank\_Requirements\_Document\_v1.0 |

## Version History

| Date of Issue | Version No. | Author | Reason for Change |
| --- | --- | --- | --- |
| 04 Feb 2020 | 1.0 | Upender Kuncham | Initial draft |
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## Distribution List

This document has been issued to the following people for review and feedback.

| Name | Role | Action Required |
| --- | --- | --- |
|  | Project Manager | Review and Signoff |
|  | Project Lead | Review and Signoff |
|  | Architect | Review |

## Supporting Documentation

| **Document Name** | **Document Link** | **Author** | **Date** |
| --- | --- | --- | --- |
|  |  |  |  |

# Introduction

## Purpose of Document

The purpose of this document is to provide requirements need to be captured for implementing the 15 applications in ESB. This document outlines requirements captured with respect to Installation and configuration of ESB. This document acts as an input for the setting up the ESB.

## Scope

The solution described in this document covers all the requirements gathered for the installation and configuration of ESB.

### In-Scope

The Requirement Gathering Document takes into consideration following:

* Deployment of Virtual Machines/ Logical Partitions to Host the IBM ACE Application Servers.

## Assumptions

|  |  |
| --- | --- |
| **Reference ID** | **Assumptions** |
| A001 | Considering the installation and configuration for 5 Environments(DEV/SIT,UAT,QA,PROD,DR) |
| A002 | Considering the installation in Operating System AIX 7.2 or later. |
| A003 | Considering the Production with High Availability Active-Active |
| A004 | Considering Load balancer is available |

Table 1: Assumptions

# Requirements

## GUI Screens

Following table lists field level details captured for Change Module

\* Mandatory Field

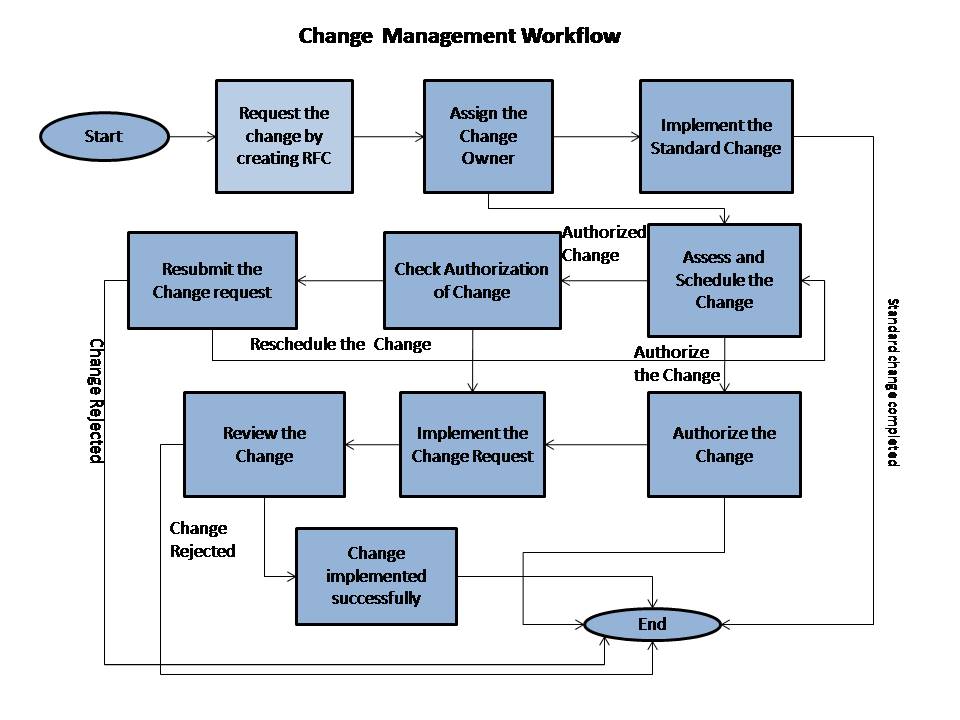
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Default Field Name in ICD** | | **NNPC Field Name** | | | | **Field Description** | | | **Requirements Captured** | | **Data Type** | | **Size** |
|  | | | | | | | | | | | | | |
| \*Change | | \*Request For Change Number | | | | Identifies the change work order. | | | Auto generated number with prefix ‘RFC’ | | STRING | | 10 |
| Summary | | \*Description of Change | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Details | | Details | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| Change Type  (Emergency, Normal, Standard) | | \*Change Type | | | | Type of Change | | | It should contain the following values   * Major * Normal * Standard | | STRING | | 30 |
| Customer | |  | | | | The primary customer for the specified configuration item, asset (if no customer is associated with the configuration item), or location (if no customer is associated with asset or configuration item). | | |  | | STRING | | 12 |
| Take ownership | | Take ownership | | | | Check if you want to own this new Change | | |  | | BOOLEAN | | 1 |
| Start Change process workflow | | Start Change process workflow | | | | Check if you want the Change process workflow to start now | | |  | | BOOLEAN | | 1 |
| **Change Main Tab** | | | | | | | | | | | | | |
| Change | | \*Request For Change Number | | | | Identifies the change work order. | | | Read only | | STRING | | 10 |
| Summary | | \*Description of Change | | | | Description of the change work order. | | | Read only | | STRING | | 320 |
| Change Type | | \*Change Type | | | | Change Type | | | Read only | | STRING | | 30 |
| Failure Probability | | Failure Probability | | | | Probability that the Change implementation will fail | | | It should contain the following values   * 1 - High * 2 - Medium * 3 – Low | | INTEGER | | 12 |
| Impact  (Critical, High, Medium, Low,  Planning) | | Impact on Project Success | | | | Impact | | | It should contain the following values   * 1 - Critical * 2 - High * 3 - Medium * 4 - Low | | INTEGER | | 12 |
| Change Category | |  | | | | Change Category | | | It should contain the following values   * Major Change * Minor Change * Significant Change | | STRING | | 30 |
| Status  (Waiting on Approval, Failed, Review, Approved, Canceled, Closed, Completed, In Progress, Waiting on Material, Waiting on Plant Cond,  Waiting to be Scheduled) | | Status | | | | Status of the change | | | It should contain the following values   * Modified * Approved * Rejected * Deferred | | STRING | | 16 |
| Repair Facility | |  | | | | Specifies the repair facility location. A repair facility can take ownership of work orders from multiple sites in the same organization. User security can be configured to give permission to view work orders in multiple sites if the work orders are owned by a single repair facility. | | |  | | STRING | | 12 |
| Urgency  (Critical, High, Medium, Low,  Planning) | | Urgency | | | | Urgency | | | It should contain the following values   * Critical * High * Medium * Low * Planning | | INTEGER | | 12 |
| Reason for Change | | Business Reasons | | | | Describes the reason for the change. To enter or view additional information, click the Long Description button. | | |  | | STRING | | 50 |
| Repair Facility Site | |  | | | | The site for the repair facility. | | |  | | STRING | | 8 |
| Priority  (Critical, High, Medium, Low,  Planning) | | Priority Level | | | | The priority of the Change captures how quickly this Change needs to be implemented. It should be set based on the impact and urgency of the Change. | | | It should contain the following values   * Emergency * High * Medium * Low | | INTEGER | | 12 |
| Effect of Not Implementing | | Effect of Not Implementing | | | | Record the business, technical, and financial effects of not implementing this Change | | |  | | STRING | | 50 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| Risk  (Critical, High, Medium, Low,  None) | | Risk | | | | Defines the risk level of the change. Risk may be a numeric value or a term such as High, Medium, Low, or some other value based upon your business definitions. | | | It should contain the following values   * Critical * High * Medium * Low * None | | STRING | | 10 |
| Classification | | Classification | | | | When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application. | | |  | | STRING | | 254 |
| Class Description | | Class Description | | | | Description of the classification specified for this record | | |  | | STRING | | 100 |
| **Primary Target section** | | | | | | | | | | | | | |
| Configuration Item | | Configuration Item | | | | Configuration Item | | |  | | STRING | | 150 |
| Asset | | Asset | | | | Identifies the asset. | | |  | | STRING | | 12 |
| Configuration Item Name | | Configuration Item Name | | | | User-friendly name of the CI | | | Read only.  This will be populated based on selected CI | | STRING | | 192 |
| Location | | Location | | | | Identifies the change's location. | | |  | | STRING | | 12 |
| CI Business Impact | | CI Business Impact | | | | How important is this CI to your business processes? The lower the number the more critical it is to your business process. | | | Read only.  This will be populated based on selected CI | | INTEGER | | 12 |
| Asset/Location Priority | |  | | | | Identifies the priority level copied from the asset or location record and used to schedule the work order. Values from 0-999 are valid, but we recommend limiting your range of values to 0-9, where 0 designates the lowest priority. We also recommend assigning priority values only to locations. Entering a value will update the CalcPriority field according to the calculation option in the PriCalc table. MAXIMO uses this value to update the Respond By date. | | |  | | INTEGER | | 12 |
| Outage | |  | | | | The outage level experienced by the primary CI target | | |  | | STRING | | 192 |
| Target Description | |  | | | | Temporary target description for targeting CIs | | |  | | STRING | | 50 |
| **Additional Target section (Additional targets effected by this change request)** | | | | | | | | | | | | | |
| Asset | |  | | | | An asset that is associated with the work order. | | |  | | STRING | | 12 |
| Target Description | |  | | | | A temporary description of the group of assets, locations, or configuration items. For example, you have a work order to upgrade all of the company notebooks. You can enter a description of the group of notebooks until you can identify specific asset numbers for each notebook. | | |  | | STRING | | 50 |
| Location | |  | | | | A location that is associated with the work order. | | |  | | STRING | | 12 |
| Comment | |  | | | | Comment or further information pertaining to the asset, location, or configuration item. | | |  | | STRING | | 250 |
| Configuration Item Number | |  | | | | A configuration item that is associated with the work order. | | |  | | STRING | | 150 |
| Sequence | |  | | | | The place of the asset, location, or configuration item in a sequential order. For example, you have a work order to inspect some train cars. The train cars are in sequential order and you must inspect each train car sequentially. You assign a number to each train car according to its place in that sequence. | | |  | | INTEGER | | 12 |
| Configuration Item Name | |  | | | | User-friendly name of the CI | | |  | | STRING | | 192 |
| Mark Progress | |  | | | | Select this check box when you finish working with the asset, location, or configuration item. | | |  | | BOOLEAN | | 1 |
| Business Impact  (Critical, High, Medium, Low,  None) | |  | | | | How important is this CI to your business processes? The lower the number the more critical it is to your business process. | | | It should contain the following values   * Critical * High * Medium * Low * None | | INTEGER | | 12 |
| Site | |  | | | | The site that is associated with the asset, location, or configuration item. | | |  | | STRING | | 8 |
| Outage | |  | | | | Outage information for Impact Analysis. | | | It should contain the following values   * Degradation * None * Offline | | STRING | | 192 |
| **Source CIs section (Software Image CIs that will be installed by this change request)** | | | | | | | | | | | | | |
| CI number | |  | | | | CI number. | | |  | | STRING | | 150 |
| Sequence | |  | | | | The order in which the source CIs should be rolled out to the target CIs. For example, if both CIs have a sequence number of 10, then they should be rolled out in parallel. Any number is supported. | | |  | | INTEGER | | 12 |
| Configuration Item Name | |  | | | | User-friendly name of the CI | | |  | | STRING | | 192 |
| Progress | |  | | | | Defines the progress of the work with respect to a particular source CI. For example, indicates whether the source CI has rolled out onto all of the targets for this work order. | | |  | | BOOLEAN | | 1 |
| Classification | |  | | | | When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application. | | |  | | STRING | | 254 |
| Source Description | |  | | | | Source description. | | |  | | STRING | | 50 |
| **Requester Information section** | | | | | | | | | | | | | |
| Reported By | | ID No | | | | The personid of the reported by | | |  | | STRING | | 30 |
| On Behalf Of | | On Behalf Of | | | | Personid of onbelfof | | |  | | STRING | | 30 |
| Name | | Initiator’s Name | | | | Name of the reported by | | |  | | STRING | | 62 |
| Phone | | Phone Ext | | | | The phone number (usually a work site telephone number) associated with the change. If the Reported By person has a phone number associated with it, that phone number is the default for this field | | |  | | INTEGER | | 30 |
| Name | | Name | | | | Name of On Behalf of person | | |  | | STRING | | 62 |
| Reported Date | | Submission Date | | | | The date and time the change was reported. | | |  | | DATETIME | | 10 |
| **Section A: Below details will be displayed on hover of ‘Reported By’** | | | | | | | | | | | | | |
| Person | | |  | | | |  |  | |  | |  | |
| Site | | |  | | | |  |  | |  | |  | |
| Name | | |  | | | |  |  | |  | |  | |
| Location | | |  | | | |  |  | |  | |  | |
| Primary Phone | | |  | | | |  |  | |  | |  | |
| Title | | |  | | | |  |  | |  | |  | |
| Primary Email | | |  | | | |  |  | |  | |  | |
| Department | | |  | | | |  |  | |  | |  | |
| Primary Calendar | | |  | | | |  |  | |  | |  | |
| Primary shift | | |  | | | |  |  | |  | |  | |
| Supervisor | | |  | | | |  |  | |  | |  | |
|  | | | Division | | | |  |  | |  | |  | |
|  | | | Section/Unit | | | |  |  | |  | |  | |
| **Billing section** | | | | | | | | | | | | | |
| GL Account | |  | | | | General ledger account code to which costs are charged. The GL account consists of up to four components: cost center, activity, resource, and element, each separated by a hyphen. | | |  | | GL | | 23 |
| Site | |  | | | | The site that is associated with the asset, location, or configuration item. | | |  | | STRING | | 8 |
| Service | |  | | | | Defines the service for the work order, for example: customer support, painting, print, telecommunications, and welding. | | |  | | STRING | | 8 |
| Vendor | |  | | | | Identifies the vendor responsible for the work. | | |  | | STRING | | 12 |
| Service Group | |  | | | | Defines the service group for the work order, for example: IT, production, facility, or fleet. | | |  | | STRING | | 8 |
| Customer | |  | | | | The primary customer for the specified configuration item, asset (if no customer is associated with the configuration item), or location (if no customer is associated with asset or configuration item). This field may also be entered. | | |  | | STRING | | 12 |
| Customer Charge Account | |  | | | | The charge account of the asset or the location (if there is no charge account on the asset). When you change the values for asset, location, this field shows the charge account for the new values. | | |  | | STRING | | 20 |
| Customer Cost Center | |  | | | | The cost center of the asset or the location (if there is no cost center on the asset). When you change the values for asset, location, this field shows the cost center for the new values. | | |  | | STRING | | 16 |
| **Assessments Tab** | | | | | | | | | | | | | |
| Change | | Request For Change No | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Owner | | Change Owner | | | | The person currently responsible for the change. | | | ‘Section A’ details will be displayed on hover of ‘Change Owner’ | | STRING | | 30 |
| Status | | Status | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | | Read only | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | |  | | STRING | | 8 |
| Risk | |  | | | | Defines the risk level of the change. Risk may be a numeric value or a term such as High, Medium, Low, or some other value based upon your business definitions. | | |  | | STRING | | 10 |
| Summary | |  | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Failure Probability | |  | | | | Probability that the Change implementation will fail | | | It should contain the following values   * High * Medium * Low | | INTEGER | | 12 |
| Impact | |  | | | | Impact | | | It should contain the following values   * Critical * High * Medium * Low * Planning | | INTEGER | | 12 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| **Analysis summary section** | | | | | | | | | | | | | |
| Maximum Assessed Impact | |  | | | | The maximum assessed impact that was captured for this Change from the Assessments performed. | | |  | | INTEGER | | 12 |
| Estimated Total Work Effort | |  | | | | Estimated total work effort of the assessments for impact analysis | | |  | | DURATION | | 8 |
| Assessment Summary | |  | | | | Enter an overall assessment summary in this field. | | |  | | STRING | | 250 |
| Estimated Total Cost | |  | | | | Estimated total cost of the assessments for impact analysis | | |  | | AMOUNT | | 10 |
| **Technical Assessments section** | | | | | | | | | | | | | |
| Assessment Type | |  | | | | Assessment type. | | |  | | STRING | | 192 |
| Owner | |  | | | | Owner of this Assessment | | |  | | STRING | | 30 |
| Impact | |  | | | | The impact this Change will have according to a particular assessor. | | |  | | STRING | | 12 |
| Owner Group | |  | | | | Owner Group for this Assessment | | |  | | STRING | | 8 |
| Assessment Description | |  | | | | Short description of the assessment. | | |  | | STRING | | 250 |
| Assessor | |  | | | | User performing the assessment. | | |  | | STRING | | 30 |
| Results | |  | | | | Results of the assessment | | |  | | STRING | | 250 |
| Date Created | |  | | | | Date this assessment was created. | | |  | | DATETIME | | 10 |
| Implementation Notes | |  | | | | Short description of assessment work item. | | |  | | STRING | | 250 |
| Last Modified | |  | | | | Date this assessment was last modified. | | |  | | DATETIME | | 10 |
| Cost | |  | | | | Cost of this assessment. | | |  | | AMOUNT | | 10 |
| Effort | |  | | | | Work effort for this assessment. | | |  | | DURATION | | 8 |
| **Business Assessments section** | | | | | | | | | | | | | |
| Assessment Type | |  | | | | Assessment type. | | |  | | STRING | | 192 |
| Owner | |  | | | | Owner of this Assessment | | |  | | STRING | | 30 |
| Impact | |  | | | | The impact this Change will have according to a particular assessor. | | |  | | STRING | | 12 |
| Owner Group | |  | | | | Owner Group for this Assessment | | |  | | STRING | | 8 |
| Assessment Description | |  | | | | Short description of the assessment. | | |  | | STRING | | 250 |
| Assessor | |  | | | | User performing the assessment. | | |  | | STRING | | 30 |
| Date Created | |  | | | | Date this assessment was created. | | |  | | DATETIME | | 10 |
| Last Modified | |  | | | | Date this assessment was last modified. | | |  | | DATETIME | | 10 |
| Cost | |  | | | | Cost of this assessment. | | |  | | AMOUNT | | 10 |
| Effort | |  | | | | Work effort for this assessment. | | |  | | DURATION | | 8 |
| **Impacts Tab** | | | | | | | | | | | | | |
| Change | |  | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the change. | | |  | | STRING | | 30 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | |  | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | |  | | STRING | | 8 |
| Summary | |  | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Outage Impact | |  | | | | The cumulative business impact of all the CIs that will experience an outage caused by this Change. | | |  | | INTEGER | | 12 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| Total Outages | |  | | | | The total number of outages that will be caused by this Change | | |  | | INTEGER | | 12 |
|  | | Back-Up Required | | | | User will select this option if back-up is required before implement the change | | |  | | BOOLEAN | | 1 |
|  | | Back-UP Completed successfully | | | | User will select this option if back-up is completed successfully | | |  | | BOOLEAN | | 1 |
| **Summary section – Areas of Impact** | | | | | | | | | | | | | |
| CI Number | |  | | | |  | | |  | |  | |  |
| CI Name | |  | | | |  | | |  | |  | |  |
| Business Impact | |  | | | |  | | |  | |  | |  |
| **Impact Analysis section (Include this section under Impact tab or new tab)** | | | | | | | | | | | | | |
|  | | | Comment on Scope Creep | | | |  |  | |  | |  | |
|  | | | Impact Assessment Result | | | |  |  | |  | |  | |
|  | | | Additional time on Project | | | |  |  | |  | |  | |
|  | | | Cost | | | |  |  | |  | |  | |
|  | | | Training Requirement (if any) | | | |  |  | |  | |  | |
| **Authorization Tab** | | | | | | | | | | | | | |
| Change | | Request For Change No | | | | Identifies the change work order. | | | Read only | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the change. | | | Read only | | STRING | | 30 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | | Read only | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | | Read only | | STRING | | 8 |
| Summary | |  | | | | Description of the change work order. | | | Read only | | STRING | | 320 |
| Authorization Decision | |  | | | | Indicates the current Approval state of the Change. | | | It should contain the following values   * Approved * Preapproved * Rejected * Resubmit | | STRING | | 20 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| Decision Reason | |  | | | | Reason for rejecting the Change | | |  | | STRING | | 100 |
| Change Authority Level | |  | | | | Current approval level for this workorder | | | It should contain the following values   * Change Authorization Level 1 * Change Authorization Level 2 * Change Authorization Level 3 * Change Authorization Level 4 | | INTEGER | | 12 |
| **Approvers for Change Table (Pre Review Approvals, Change Board Review, Post Implementation Approvals will be added in this section)** | | | | | | | | | | | | | |
| Description | | Remark | | | | Describes the areas affected | | |  | | STRING | | 100 |
| Approver | | Staff ID | | | | Approver | | |  | | STRING | | 30 |
|  | | Name | | | |  | | |  | |  | |  |
| Approver Group | | Approver Group | | | | Approver Group | | |  | | STRING | | 8 |
| Approval level | | Approval level | | | | Approval level | | | It should contain the following values   * Pre Review Approval * CAB * Post implementation Approval | | INTEGER | | 12 |
| **Schedule Approvers for Change** | | | | | | | | | | | | | |
| Description | |  | | | | Schedule approvers for Change | | |  | | STRING | | 100 |
| Approver | |  | | | | Approver | | |  | | STRING | | 30 |
| Approver Group | |  | | | | Approver Group | | |  | | STRING | | 8 |
| Type | |  | | | | The Type of Approval | | |  | | STRING | | 35 |
| Conflict Approver | |  | | | | Indicates that the schedule approver was added due to a schedule conflict. | | |  | | BOOLEAN | | 1 |
| **Approval Logs section** | | | | | | | | | | | | | |
| Summary |  | | | | Summary of the task | | | |  | | STRING | | 100 |
| Decision |  | | | | Decision of the task | | | | Approved/Rejected | | STRING | | 20 |
| Person |  | | | | Person who did approve/reject | | | |  | | STRING | | 30 |
| Transaction Date |  | | | | Date of Approval | | | |  | | DATETIME | | 10 |
| Task |  | | | | Work order number | | | |  | | STRING | | 10 |
| Memo |  | | | | Task completion memo | | | |  | | STRING | | 100 |
| **Schedule Tab** | | | | | | | | | | | | | |
| Change | | Request for Change No | | | | Identifies the change work order. | | | Read only | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the change. | | | Read only | | STRING | | 30 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | | Read only | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | | Read only | | STRING | | 8 |
| Summary | |  | | | | Description of the change work order. | | | Read only | | STRING | | 320 |
| Supervisor | |  | | | | Supervisor of the work. Maximo copies this information from the job plan, if there is one. You also can select a supervisor. | | |  | | STRING | | 30 |
| Details | |  | | | | Long Description for Work Order Description | | | Read only | | STRING | | 32,000 |
| Lead | |  | | | | Lead person responsible for the work. | | |  | | STRING | | 30 |
| Work Group | |  | | | | Identifies the work group | | |  | | STRING | | 8 |
| Verification Plan | |  | | | | Describes how to verify that the change or changewas successful; or indicate that the change or changewas successful. | | |  | | STRING | | 50 |
| Remediation Plan | | Back-out/Recovery Plan Description | | | | Describes the back out plan if the change needs to be reversed. To enter or view additional information, click the Long Description button. | | |  | | STRING | | 50 |
| Job Plan | |  | | | | Identifies the job plan on the work order. If customers are associated with the job plan, one of them must match the customer on the work order. If there is an association between the job plan and a safety plan when the job plan is used on the asset or location, the safety plan is copied. In addition, a single measurement point is copied if there is an association between the asset on the work order and the point name on the job plan. | | |  | | STRING | | 10 |
| Response Plan | |  | | | | Identifies the response plan. Must be a unique value. | | |  | | STRING | | 10 |
| Fully Automated | |  | | | | Is the Change implementation plan fully automated? The workflow can skip any manual tasks based on this setting | | |  | | BOOLEAN | | 1 |
| **Schedule Dates section** | | | | | | | | | | | | | |
| Target Start | |  | | | | Date the work is targeted to begin. | | |  | | DATETIME | | 10 |
| Target Finish | | Date of completion | | | | Date the work is targeted to be completed. | | |  | | DATETIME | | 10 |
| Start No Earlier Than | |  | | | | The earliest date at which work should start. Scheduled dates should be after this date. | | |  | | DATETIME | | 10 |
| Finish No Later Than | |  | | | | The date that work should be completed by. Scheduled dates should be before this date. | | |  | | DATETIME | | 10 |
| Scheduled Start | | Planned Implementation date | | | | Date and time the work is scheduled to begin. | | |  | | DATETIME | | 10 |
| Scheduled Finish | |  | | | | Date and time the work is scheduled to be completed. | | |  | | DATETIME | | 10 |
| Scheduler Project | |  | | | | Identifies the schedule project | | |  | | STRING | | 20 |
| Actual Start | |  | | | | Date and time the actual work begain for the work order. | | |  | | DATETIME | | 10 |
| Actual Finish | |  | | | | Date and time the work was completed. | | |  | | DATETIME | | 10 |
| Estimated Duration | | Duration Of Change | | | | Estimated number of remaining hours needed to complete the work. | | |  | | DURATION | | 8 |
| Time Remaining | |  | | | | Number of hours needed to complete the work. Maximo calculates the value from the Duration minus the number of hours worked so far. You can modify this value until the work order is closed. | | |  | | DURATION | | 8 |
| **Children of the Change section** | | | | | | | | | | | | | |
| Sequence | |  | | | | Indicates the sequence in which to execute the work orders in a work order hierarchy. | | | Manual Input | | INTEGER | | 12 |
| Status | |  | | | | Status of the work. | | | It should contain the following values   * Waiting on Approval * Failed * Review * Approved * Canceled * Closed * Completed * In Progress * Waiting on Material * Waiting on Plant Cond * Waiting to be Scheduled | | STRING | | 16 |
| Record | |  | | | | Identifies the work order number. | | | Auto populated | | STRING | | 10 |
| Class | |  | | | | The class of the work order record. | | |  | | STRING | | 16 |
| GL Account | |  | | | | General ledger account code to which work order costs are charged. The GL account consists of up to four components: cost center, activity, resource, and element, each separated by a hyphen. If the work order was generated from a PM, Maximo copies the GL account from the PM. This field is read-only if the Charge to Store? check box is selected. | | |  | | GL | | 23 |
| Asset | |  | | | | Identifies the asset. | | |  | | STRING | | 12 |
| Priority | |  | | | | Identifies the importance of the work order, from 0-999, where 0 is the lowest priority and 999 is the highest. | | | Manual Input | | INTEGER | | 12 |
| Location | |  | | | | Identifies the work order's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default here | | |  | | STRING | | 12 |
| Inherit Status Changes | |  | | | | Specifies whether the work order's status will change when its parent work order's status changes. If the check box is selected (the default), the work order's status will change as its parent's status changes. If the check box is cleared, the work order's status will be independent of its parent's status. | | |  | | BOOLEAN | | 1 |
| Configuration Item | |  | | | | Configuration Item | | |  | | STRING | | 150 |
| Accepts Charges | |  | | | | Specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order. | | |  | | BOOLEAN | | 1 |
| Configuration Item Name | |  | | | | User-friendly name of the CI | | |  | | STRING | | 192 |
| Under Flow Control | |  | | | | Flag used to indicate a records participation in flow control. When applied to a parent, it rolls down the hierarchy to all its child records. | | |  | | BOOLEAN | | 1 |
| Job Plan | |  | | | | Identifies the job plan on the work order. If customers are associated with the job plan, one of them must match the customer on the work order. If there is an association between the job plan and a safety plan when the job plan is used on the asset or location, the safety plan is copied. In addition, a single measurement point is copied if there is an association between the asset on the work order and the point name on the job plan. | | |  | | STRING | | 10 |
| Suspend Flow Control | |  | | | | Flag used to suspend and resume flow control on a parent record. Rolls down the hierarchy to all its child records. | | |  | | BOOLEAN | | 1 |
| Job Plan Revision # | |  | | | | Displays the revision number of the Job Plan the work order was generated with. | | |  | | STRING | | 12 |
| Flow Action | |  | | | | The action to be performed (if any) when the workorder is started via process flow control | | |  | | STRING | | 30 |
| Service Group | |  | | | | Defines the service group for the work order, for example: IT, production, facility, or fleet. | | |  | | STRING | | 8 |
| Flow Action Assist | |  | | | | Suppresses the automatic firing of the action in flow control | | |  | | BOOLEAN | | 1 |
| Service | |  | | | | Defines the service for the work order, for example: customer support, painting, print, telecommunications, and welding. | | |  | | STRING | | 8 |
| Launch Entry Name | |  | | | | Launch Entry | | |  | | STRING | | 32 |
| Route | |  | | | | add route field | | |  | | STRING | | 8 |
| Target Start | |  | | | | Date the work is targeted to begin. | | |  | | DATETIME | | 10 |
| Target Finish | |  | | | | Date the work is targeted to be completed. | | |  | | DATETIME | | 10 |
| Scheduled Start | |  | | | | Date and time the work is scheduled to begin. | | |  | | DATETIME | | 10 |
| Scheduled Finish | |  | | | | Date and time the work is scheduled to completed. | | |  | | DATETIME | | 10 |
| Start No Earlier Than | |  | | | | The earliest date at which work should start. Scheduled dates should be after this date. | | |  | | DATETIME | | 10 |
| Finish No Later Than | |  | | | | The date that work should be completed by. Scheduled dates should be before this date. | | |  | | DATETIME | | 10 |
| Actual Start | |  | | | | Date and time the work was actually started. | | |  | | DATETIME | | 10 |
| Actual Finish | |  | | | | Date and time the work was actually completed. | | |  | | DATETIME | | 10 |
| Estimated Duration | |  | | | | Estimated time needed to complete the work. | | |  | | DOUBLE | | 8 |
| Time Remaining | |  | | | | Number of remaining hours needed to complete the work order. Maximo calculates the value from the Duration minus the number of hours worked so far. You can modify this value until the work order is closed. | | |  | | DOUBLE | | 8 |
| Interruptible | |  | | | | Specifies whether the work order is allowed to be stopped once the work has begun and then restarted. If the check box is selected, the work can be stopped. If the check box is cleared, the work cannot be stopped and restarted. | | |  | | BOOLEAN | | 1 |
| Predecessors | |  | | | | A non-persistent field to display the work orders predecessor work orders. | | |  | | STRING | | 256 |
| Include Tasks in Schedule | |  | | | | Indicates that this work order's tasks will be included in the schedule view. | | |  | | BOOLEAN | | 1 |
| **Tasks for Change section** | | | | | | | | | | | | | |
| Task | |  | | | | Identifies the task. | | | Auto populated | | INTEGER | | 12 |
| Under Flow Control | |  | | | | Flag used to indicate a records participation in flow control. When applied to a parent, it rolls down the hierarchy to all its child records. | | |  | | BOOLEAN | | 1 |
| Sequence | |  | | | | Indicates the sequence in which to execute the work orders in a work order hierarchy. | | |  | | INTEGER | | 12 |
| Flow Action | |  | | | | The action to be performed (if any) when the workorder is started via process flow control | | |  | | STRIGN | | 30 |
| Inherit Status Changes | |  | | | | Specifies whether the work order's status will change when its parent work order's status changes. If the check box is selected (the default), the work order's status will change as its parent's status changes. If the check box is cleared, the work order's status will be independent of its parent's status. | | |  | | BOOLEAN | | 1 |
| Status | |  | | | | Status of the work. | | | It should contain the following values   * Waiting on Approval * Failed * Review * Approved * Cancelled * Closed * Completed * In Progress * Waiting on Material * Waiting on Plant Cond * Waiting to be Scheduled | | STRING | | 16 |
| Flow Action Assist | |  | | | | Suppresses the automatic firing of the action in flow control | | |  | | BOOLEAN | | 1 |
| Accepts Charges | |  | | | | Specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order. | | |  | | BOOLEAN | | 1 |
| Implementation Task | |  | | | | Boolean flag to indicate if this is an implementation task. | | |  | | BOOLEAN | | 1 |
| Classification | |  | | | | When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application. | | |  | | STRING | | 254 |
| Classification Description | |  | | | | Description of the classification specified for this record | | |  | | STRING | | 100 |
| Assisted Workflow | |  | | | | Assisted workflow to kick off when the task owner needs help. | | |  | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the work from a service management perspective. | | |  | | STRING | | 30 |
| Launch Entry Name | |  | | | | Launch Entry | | |  | | STRING | | 32 |
| Owner Group | |  | | | | The group currently responsible for the work from a service management perspective. | | |  | | STRING | | 8 |
| Route | |  | | | | add route field | | |  | | STRING | | 8 |
| Route Stop | |  | | | | add a new field | | |  | | INTEGER | | 19 |
| Reference WO | |  | | | | Identifies the work order number. | | | Auto populated | | STRING | | 10 |
| Asset | |  | | | | Identifies the asset. | | |  | | STRING | | 12 |
| Location | |  | | | | Identifies the work order's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default here | | |  | | STRING | | 12 |
| Configuration Item | |  | | | | Configuration Item | | |  | | STRING | | 150 |
| Configuration Item Name | |  | | | | User-friendly name of the CI | | |  | | STRING | | 192 |
| Service Group | |  | | | | Defines the service group for the work order, for example: IT, production, facility, or fleet. | | |  | | STRING | | 8 |
| CI Business Impact | |  | | | | How important is this CI to your business processes? The lower the number the more critical it is to your business process. | | |  | | INTEGER | | 12 |
| Service | |  | | | | Defines the service for the work order, for example: customer support, painting, print, telecommunications, and welding. | | |  | | STRING | | 8 |
| Outage | |  | | | | The outage level experienced by the primary CI target | | | It should contain the following values   * Degradation * None * Offline | | STRING | | 192 |
| Inspector | |  | | | | Inspector responsible for the work, measurement or observation. | | |  | | STRING | | 30 |
| Measurement Point | |  | | | | The point number on the asset for which the measurement is taken. | | |  | |  | |  |
| Target Start | |  | | | | Date the work is targeted to begin. | | |  | | DATETIME | | 10 |
| Target Finish | |  | | | | Date the work is targeted to be completed. | | |  | | DATETIME | | 10 |
| Scheduled Start | |  | | | | Date and time the work is scheduled to begin. | | |  | | DATETIME | | 10 |
| Scheduled Finish | |  | | | | Date and time the work is scheduled to completed. | | |  | | DATETIME | | 10 |
| Start No Earlier Than | |  | | | | The earliest date at which work should start. Scheduled dates should be after this date. | | |  | | DATETIME | | 10 |
| Finish No Later Than | |  | | | | The date that work should be completed by. Scheduled dates should be before this date. | | |  | | DATETIME | | 10 |
| Actual Start | |  | | | | Date and time the work was actually started. | | |  | | DATETIME | | 10 |
| Actual Finish | |  | | | | Date and time the work was actually completed. | | |  | | DATETIME | | 10 |
| Estimated Duration | |  | | | | Estimated time needed to complete the work. | | |  | | DOUBLE | | 8 |
| Time Remaining | |  | | | | Number of remaining hours needed to complete the work order. Maximo calculates the value from the Duration minus the number of hours worked so far. You can modify this value until the work order is closed. | | |  | | DOUBLE | | 8 |
| Predecessors | |  | | | | A non-persistent field to display the work orders predecessor work orders. | | |  | | STRING | | 256 |
| Task Target | |  | | | | We can relate Assets, CIs, Collections and Relationships in this table | | |  | |  | |  |
| **Labor tab** | | | | | | | | | | | | | |
| Task | |  | | | | Identifies the task for the planned craft or labor. | | |  | | INTEGER | | 12 |
| Vendor | |  | | | | Identifies the vendor or contractor, by company code, which will supply the labor resources. | | |  | | STRING | | 12 |
| Regular Hours | |  | | | | Number of labor hours required to complete the work. | | |  | | DOUBLE | | 8 |
| Craft | |  | | | | Identifies the craft. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 8 |
| Labor Contract | |  | | | | Identifies the contract with the vendor that will supply labor resources. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 8 |
| Rate | |  | | | | Hourly pay rate for the labor or craft. Maximo copies this data from the Labor table. If you modify this field, Maximo recalculates the Line Cost field on the Labor subtab, and the Current Estimate Labor Cost in the View Costs dialog box.You can edit this field if the work order's status allows work plan labor edits. Work Order editing rules are set up in the Organizations application. | | |  | | DOUBLE | | 10 |
| Skill Level | |  | | | | Skill level associated with the craft. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 15 |
| Quantity | |  | | | | The required quantity of individuals | | |  | | INTEGER | | 12 |
| Line Cost | |  | | | | The calculated cost for the craft or labor. Maximo derives the value as: Regular Hours multiplied by the Rate plus any premium pay defined. | | |  | | DOUBLE | | 10 |
| Line Price | |  | | | | Estimated price for this labor transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding labor transaction record. | | |  | | DOUBLE | | 10 |
| Labor | |  | | | | Identifies the labor planned for the work order task. | | |  | | STRING | | 8 |
| Rate Changed | |  | | | | Indicates whether a user has overwritten the value in the Rate field. If the check box is cleared (the default), and the labor's rate or the labor contract has changed since the labor was planned, Maximo overwrites the Rate field on approval. If the check box is selected, Maximo does not overwrite the Rate field on approval. | | |  | | BOOLEAN | | 1 |
| Outside | |  | | | | Specifies if the planned labor is associated with a vendor | | |  | | BOOLEAN | | 1 |
| **Materials Tab:** | | | | | | | | | | | | | |
| Task | |  | | | | Task | | |  | | INTEGER | | 12 |
| Line Type | |  | | | | Identifies the type of material, for example, item, material, service, special order or external catalog item. | | |  | | STRING | | 15 |
| Item | |  | | | | Identifies the item. If you enter an item that is defined as a hazardous material in Inventory, Maximo inserts hazard information on the Safety Plans tab. | | |  | | STRING | | 30 |
| Quantity | |  | | | | Number of items you need for the task. If you modify this field, Maximo recalculates the Line Cost field on the Materials subtab, and the Current Estimate Material Cost on the View Costs dialog box. You can edit this field if the work order's status allows work plan material edits. Work order editing rules are set up in the Organizations application. | | |  | | DECIMAL | | 15 |
| Order Unit: | |  | | | | Order unit for the item | | |  | | STRING | | 16 |
| Unit Cost: | |  | | | | Price of the item per unit at the time the work order was approved. | | |  | | DOUBLE | | 10 |
| Line Cost: | |  | | | | Total cost of the item. MAXIMO calculates this using the following formula: (quantity) x (unit cost). | | |  | | DOUBLE | | 10 |
| List Sales Price: | |  | | | | The item's list sales price. This price must be a positive value and can have decimals. | | |  | | DOUBLE | | 10 |
| Line Price: | |  | | | | Estimated price for this labor transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding labor transaction record. | | |  | | DOUBLE | | 10 |
| Storeroom | |  | | | | Storeroom location of the item. You can edit this field if the work order's status allows work plan materials edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 12 |
| Storeroom Site: | |  | | | | Identifies the site in which the storeroom is located. | | |  | | STRING | | 8 |
| Direct Issue? | |  | | | | Specifies whether you obtain the item directly from a purchase or from a storeroom. If you clear the check box (the default), you obtain the item from a storeroom and you must enter a value in the Storeroom field. When the work order is approved, Maximo reserves the item in inventory. If you select the check box, the item will be purchased for the approved work order when you use the Reorder Direct Issue Items/Services in the Inventory application. You can edit this field if the work order's status allows work plan materials edits. Work order editing rules are set up in the Organizations application. | | |  | | BOOLEAN | | 1 |
| Vendor: | |  | | | | Identifies the suggested vendor for the item. If the Direct Issue? check box is selected, you can edit this field if the work order's status allows work plan material edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 12 |
| Stock Category: | |  | | | | Specifies whether the item is a stocked (STK), non-stocked (NS), or a special order (SP) item. | | |  | | STRING | | 16 |
| Condition Code: | |  | | | | Identifies the condition of the item planned for the work. | | |  | | STRING | | 30 |
| PR | |  | | | | Purchase requisition on which this direct issue item is ordered. | | |  | | STRING | | 8 |
| PR Line: | |  | | | | Line number on the purchase requisition for the item. | | |  | | INTEGER | | 12 |
| Issue To: | |  | | | | Labor or craft to whom to issue the item or material. | | |  | | STRING | | 8 |
| Required Date: | |  | | | | Date you require the item. If the Direct Issue? check box is selected, you can edit this field if the work order's status allows work plan material edits. Work order editing rules are set up in the Organizations application. | | |  | | DATETIME | | 10 |
| Requested By: | |  | | | | Identifies the person requesting the item. | | |  | | STRING | | 30 |
| Condition Rate: | |  | | | | Condition's rate expressed as a percentage. For example, a condition code of NEW would have 100 as the condition rate (in percent), while a condition code of FAIR might have 50 as the condition rate. | | |  | | DECIMAL | | 8 |
| Condition Enabled? | |  | | | | Specifies whether this item has a value or worth you want to assign and track based on its physical condition. You can apply different rates to an item as its condition changes from use, such as from new to used. If the check box is selected, you must assign at least one full value (100%) condition code for this item, and any other codes you assign must be a percentage of that. If the check box is cleared (the default), the physical condition of the item is not tracked. | | |  | | BOOLEAN | | 1 |
| **Services Tab:** | | | | | | | | | | | | | |
| Task | |  | | | | Identifies the task to which the service applies. | | |  | | INTEGER | | 12 |
| Line Type | |  | | | | Identifies the type of service, for example standard service (one that is used repeatedly, such as grounds maintenance or installation), or a service (a sin STRINGe-type purchase or not used often enough to maintain a vendor catalog for it, such as painting). | | |  | | STRING | | 15 |
| Quantity | |  | | | | Quantity of the service for the work plan task. | | |  | | DECIMAL | | 15 |
| Order Unit | |  | | | | Order unit for the item | | |  | | STRING | | 16 |
| Unit Cost | |  | | | | Cost of the service at the time the work order is approved. | | |  | | DOUBLE | | 10 |
| Line Cost | |  | | | | Calculated value. Maximo calculates the value using the following formula: Quantity x Unit Cost. | | |  | | DOUBLE | | 10 |
| List Sales Price | |  | | | | The item's list sales price | | |  | | DOUBLE | | 10 |
| Line Price | |  | | | | Estimated price of this service transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding service transaction record. | | |  | | DOUBLE | | 10 |
| Vendor | |  | | | | Suggested vendor from whom to order the service. | | |  | | STRING | | 12 |
| PR | |  | | | | The total of the prices for all of the asset, configuration item or location attribute values based on the prices specified of attribute pricing in this price schedule. | | |  | | DOUBLE | | 10 |
| PR Line | |  | | | | Line number on the purchase requisition for the service. Maximo populates this field after the work order is approved and you reorder direct issue items and services in the Inventory application. | | |  | | INTEGER | | 12 |
| Issue To | |  | | | | Identifies the Labor or Craft to whom the service will be issued. | | |  | | STRING | | 8 |
| Required Date | |  | | | | Date and time the service is needed. | | |  | | DATETIME | | 10 |
| Requested By | |  | | | | Identifies the person requesting the service. | | |  | | STRING | | 30 |
| Service | |  | | | | Identifies the standard service. | | |  | | STRING | | 30 |
| **Tools Tab:** | | | | | | | | | | | | | |
| Task | |  | | | | Task | | |  | | INTEGER | | 12 |
| Tool | |  | | | | Identifies the tool. | | |  | | STRING | | 30 |
| Quantity | |  | | | | Quantity of the tool required for the planned work. | | |  | | DECIMAL | | 15 |
| Tool Hours: | |  | | | | Number of hours for which the tool will be used for the work. | | |  | | DURATION | | 8 |
| Rate | |  | | | | Hourly rate for the tool. If you modify this field, Maximo recalculates the Line Cost field on the Tools subtab, and the Current Estimate Tool Cost in the View Costs dialog box. You can edit this field if the work order's status allows work plan tool edits. Work Order editing rules are set up in the Organizations application. | | |  | | DOUBLE | | 10 |
| Line Cost: | |  | | | | The calculated cost for the tool. Maximo derives the value as: (Tool Hours) x (Rate). | | |  | | DOUBLE | | 10 |
| List Sales Price: | |  | | | | List Sales Price | | |  | | DOUBLE | | 10 |
| Line Price: | |  | | | | Estimated price of this tool transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding tool transaction record. | | |  | | DOUBLE | | 10 |
| Reservation Required? | |  | | | | Specifies whether the technician will need to get the tool from a storeroom (make a reservation) or provide it himself. If the check box is cleared (the default), no reservation is required. If the check box is selected, a reservation is required. When you select the Reservation Required check box, you must specify the storeroom from which to get the tool. | | |  | | BOOLEAN | | 1 |
| Storeroom | |  | | | | Storeroom location of the tool. You can edit this field if the work order's status allows work plan tool edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 12 |
| Storeroom Site: | |  | | | | Identifies the site in which the storeroom is located. | | |  | | STRING | | 8 |
| Issue To: | |  | | | | Identifies the labor to which the tool is issued | | |  | | STRING | | 8 |
| Rate Changed ? | |  | | | | Indicates whether a user has overwritten the value in the Rate field. If the check box is cleared (the default), and the tool's rate has changed since the tool was planned, Maximo overwrites the Rate field on approval. If the check box is selected, Maximo does not overwrite the Rate field on approval. | | |  | | BOOLEAN | | 1 |
| **Work Plan Tab** | | | | | | | | | | | | | |
| Change | |  | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the change. | | |  | | STRING | | 30 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | |  | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | |  | | STRING | | 8 |
| Summary | |  | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| Job Plan | |  | | | | Identifies the job plan on the work order. If customers are associated with the job plan, one of them must match the customer on the work order. If there is an association between the job plan and a safety plan when the job plan is used on the asset or location, the safety plan is copied. In addition, a single measurement point is copied if there is an association between the asset on the work order and the point name on the job plan. | | |  | | STRING | | 10 |
| **Related Records Tab** | | | | | | | | | | | | | |
| Change | |  | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | | It should contain the following values   * Waiting on Approval * Failed * Review * Approved * Canceled * Closed * Completed * In Progress * Waiting on Material * Waiting on Plant Cond * Waiting to be Scheduled | | STRING | | 16 |
| Summary | |  | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32000 |
| Owner | |  | | | | The person currently responsible for the change. | | |  | | STRING | | 30 |
| Owner Group | |  | | | | The group currently responsible for the change. | | |  | | STRING | | 8 |
| Parent | |  | | | | Is the status change occurring because the parent change status? | | |  | | BOOLEAN | | 1 |
| **Related Work Orders Section** | | | | | | | | | | | | | |
| Work Order | |  | | | | Identifies the related work order. Click the Detail Menu button to select an option and retrieve a value. | | |  | | STRING | | 10 |
| Class | |  | | | | Class of the related record. | | | It should contain the following values   * ACTIVITY * CHANGE * PMCFGWO * RELEASE * WORKORDER | | STRING | | 16 |
| Asset | |  | | | | Identifies the asset. | | |  | | STRING | | 12 |
| Location | |  | | | | Identifies the work order's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default here | | |  | | STRING | | 12 |
| Classification | |  | | | | When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application. | | |  | | STRING | | 254 |
| Status | |  | | | | Status of the work order, for example, in progress, waiting on material, waiting for approval, completed, or closed. | | |  | | STRING | | 16 |
| Relationship | |  | | | | Describes the relationship of this record to the record in the key field. | | |  | | STRING | | 18 |
| **Related Tickets Section** | | | | | | | | | | | | | |
| Related Record Key | |  | | | | Identifies the related ticket. Enter a value or click the Detail Menu button to select an option and retrieve a value. | | |  | | STRING | | 10 |
| Class | |  | | | | Class of the related ticket. Maximo enters this value for the related ticket you select. You can choose a ticket class before choosing a related ticket; if you do so, Maximo displays only tickets of the chosen class in the Select Value dialog box for the related ticket. To choose a ticket class, enter a value or click the Select Value button. | | |  | | STRING | | 16 |
| Asset | |  | | | | Default assetnum | | |  | | STRING | | 12 |
| Location | |  | | | | Default Location | | |  | | STRING | | 12 |
| Classification | |  | | | | When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application. | | |  | | STRING | | 254 |
| Status | |  | | | | Status of the ticket. Default statuses are NEW, QUEUED, PENDING, INPROG, RESOLVED, and CLOSED. See the Help for a Service Desk application for more information on statuses. | | | It should contain the following values   * Waiting on Approval * Failed * Review * Approved * Canceled * Closed * Completed * In Progress * Waiting on Material * Waiting on Plant Cond * Waiting to be Scheduled | | STRING | | 10 |
| Relationship | |  | | | | Describes the relationship of this record to the record in the key field. | | |  | | STRING | | 18 |
| **Actuals Tab** | | | | | | | | | | | | | |
| Change | |  | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the change. | | |  | | STRING | | 30 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | |  | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | |  | | STRING | | 8 |
| Summary | |  | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Supervisor | |  | | | | Supervisor of the work. Maximo copies this information from the job plan, if there is one. You also can select a supervisor. | | |  | | STRING | | 30 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| Lead | |  | | | | Lead person responsible for the work. | | |  | | STRING | | 30 |
| Work Group | |  | | | | Identifies the work group | | |  | | STRING | | 8 |
| Quote Type | |  | | | | Type of quote, for example, Fixed Price or Not to Exceed. Valid values are in the QUOTETYPE synonym domain. | | |  | | STRING | | 8 |
| Quoted Price | |  | | | | Price quoted for the work order. | | |  | | DOUBLE | | 10 |
| **Children of the Change section** | | | | | | | | | | | | | |
| Sequence | |  | | | | Indicates the sequence in which to execute the work orders in a work order hierarchy. | | | Manual Input | | INTEGER | | 12 |
| Status | |  | | | | Status of the work. | | | It should contain the following values   * Waiting on Approval * Failed * Review * Approved * Canceled * Closed * Completed * In Progress * Waiting on Material * Waiting on Plant Cond * Waiting to be Scheduled | | STRING | | 16 |
| Record | |  | | | | Identifies the work order number. | | | Auto populated | | STRING | | 10 |
| Class | |  | | | | The class of the work order record. | | |  | | STRING | | 16 |
| GL Account | |  | | | | General ledger account code to which work order costs are charged. The GL account consists of up to four components: cost center, activity, resource, and element, each separated by a hyphen. If the work order was generated from a PM, Maximo copies the GL account from the PM. This field is read-only if the Charge to Store? check box is selected. | | |  | | GL | | 23 |
| Asset | |  | | | | Identifies the asset. | | |  | | STRING | | 12 |
| Priority | |  | | | | Identifies the importance of the work order, from 0-999, where 0 is the lowest priority and 999 is the highest. | | | Manual Input | | INTEGER | | 12 |
| Location | |  | | | | Identifies the work order's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default here | | |  | | STRING | | 12 |
| Inherit Status Changes | |  | | | | Specifies whether the work order's status will change when its parent work order's status changes. If the check box is selected (the default), the work order's status will change as its parent's status changes. If the check box is cleared, the work order's status will be independent of its parent's status. | | |  | | BOOLEAN | | 1 |
| Configuration Item | |  | | | | Configuration Item | | |  | | STRING | | 150 |
| Accepts Charges | |  | | | | Specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order. | | |  | | BOOLEAN | | 1 |
| Configuration Item Name | |  | | | | User-friendly name of the CI | | |  | | STRING | | 192 |
| Under Flow Control | |  | | | | Flag used to indicate a records participation in flow control. When applied to a parent, it rolls down the hierarchy to all its child records. | | |  | | BOOLEAN | | 1 |
| Job Plan | |  | | | | Identifies the job plan on the work order. If customers are associated with the job plan, one of them must match the customer on the work order. If there is an association between the job plan and a safety plan when the job plan is used on the asset or location, the safety plan is copied. In addition, a single measurement point is copied if there is an association between the asset on the work order and the point name on the job plan. | | |  | | STRING | | 10 |
| Suspend Flow Control | |  | | | | Flag used to suspend and resume flow control on a parent record. Rolls down the hierarchy to all its child records. | | |  | | BOOLEAN | | 1 |
| Job Plan Revision # | |  | | | | Displays the revision number of the Job Plan the work order was generated with. | | |  | | STRING | | 12 |
| Flow Action | |  | | | | The action to be performed (if any) when the workorder is started via process flow control | | |  | | STRING | | 30 |
| Service Group | |  | | | | Defines the service group for the work order, for example: IT, production, facility, or fleet. | | |  | | STRING | | 8 |
| Flow Action Assist | |  | | | | Suppresses the automatic firing of the action in flow control | | |  | | BOOLEAN | | 1 |
| Service | |  | | | | Defines the service for the work order, for example: customer support, painting, print, telecommunications, and welding. | | |  | | STRING | | 8 |
| Launch Entry Name | |  | | | | Launch Entry | | |  | | STRING | | 32 |
| Route | |  | | | | add route field | | |  | | STRING | | 8 |
| Target Start | |  | | | | Date the work is targeted to begin. | | |  | | DATETIME | | 10 |
| Target Finish | |  | | | | Date the work is targeted to be completed. | | |  | | DATETIME | | 10 |
| Scheduled Start | |  | | | | Date and time the work is scheduled to begin. | | |  | | DATETIME | | 10 |
| Scheduled Finish | |  | | | | Date and time the work is scheduled to completed. | | |  | | DATETIME | | 10 |
| Start No Earlier Than | |  | | | | The earliest date at which work should start. Scheduled dates should be after this date. | | |  | | DATETIME | | 10 |
| Finish No Later Than | |  | | | | The date that work should be completed by. Scheduled dates should be before this date. | | |  | | DATETIME | | 10 |
| Actual Start | |  | | | | Date and time the work was actually started. | | |  | | DATETIME | | 10 |
| Actual Finish | |  | | | | Date and time the work was actually completed. | | |  | | DATETIME | | 10 |
| Estimated Duration | |  | | | | Estimated time needed to complete the work. | | |  | | DOUBLE | | 8 |
| Time Remaining | |  | | | | Number of remaining hours needed to complete the work order. Maximo calculates the value from the Duration minus the number of hours worked so far. You can modify this value until the work order is closed. | | |  | | DOUBLE | | 8 |
| Interruptible | |  | | | | Specifies whether the work order is allowed to be stopped once the work has begun and then restarted. If the check box is selected, the work can be stopped. If the check box is cleared, the work cannot be stopped and restarted. | | |  | | BOOLEAN | | 1 |
| Predecessors | |  | | | | A non-persistent field to display the work orders predecessor work orders. | | |  | | STRING | | 256 |
| Include Tasks in Schedule | |  | | | | Indicates that this work order's tasks will be included in the schedule view. | | |  | | BOOLEAN | | 1 |
| **Tasks for Change section** | | | | | | | | | | | | | |
| Task | |  | | | | Identifies the task. | | | Auto populated | | INTEGER | | 12 |
| Under Flow Control | |  | | | | Flag used to indicate a records participation in flow control. When applied to a parent, it rolls down the hierarchy to all its child records. | | |  | | BOOLEAN | | 1 |
| Sequence | |  | | | | Indicates the sequence in which to execute the work orders in a work order hierarchy. | | |  | | INTEGER | | 12 |
| Flow Action | |  | | | | The action to be performed (if any) when the workorder is started via process flow control | | |  | | STRIGN | | 30 |
| Inherit Status Changes | |  | | | | Specifies whether the work order's status will change when its parent work order's status changes. If the check box is selected (the default), the work order's status will change as its parent's status changes. If the check box is cleared, the work order's status will be independent of its parent's status. | | |  | | BOOLEAN | | 1 |
| Status | |  | | | | Status of the work. | | | It should contain the following values   * Waiting on Approval * Failed * Review * Approved * Canceled * Closed * Completed * In Progress * Waiting on Material * Waiting on Plant Cond * Waiting to be Scheduled | | STRING | | 16 |
| Flow Action Assist | |  | | | | Suppresses the automatic firing of the action in flow control | | |  | | BOOLEAN | | 1 |
| Accepts Charges | |  | | | | Specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order. | | |  | | BOOLEAN | | 1 |
| Implementation Task | |  | | | | Boolean flag to indicate if this is an implementation task. | | |  | | BOOLEAN | | 1 |
| Classification | |  | | | | When you specify a classification for an object, you can organize related parent and child objects in a hierarchical structure, similar to a file directory. You can then drill up and down through the hierarchy to view associated items. Create and manage classifications in the Classifications application. | | |  | | STRING | | 254 |
| Classification Description | |  | | | | Description of the classification specified for this record | | |  | | STRING | | 100 |
| Assisted Workflow | |  | | | | Assisted workflow to kick off when the task owner needs help. | | |  | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the work from a service management perspective. | | |  | | STRING | | 30 |
| Launch Entry Name | |  | | | | Launch Entry | | |  | | STRING | | 32 |
| Owner Group | |  | | | | The group currently responsible for the work from a service management perspective. | | |  | | STRING | | 8 |
| Route | |  | | | | add route field | | |  | | STRING | | 8 |
| Route Stop | |  | | | | add a new field | | |  | | INTEGER | | 19 |
| Reference WO | |  | | | | Identifies the work order number. | | | Auto populated | | STRING | | 10 |
| Asset | |  | | | | Identifies the asset. | | |  | | STRING | | 12 |
| Location | |  | | | | Identifies the work order's location. This is not necessarily the asset's location, however, if an asset is entered, its location will default here | | |  | | STRING | | 12 |
| Configuration Item | |  | | | | Configuration Item | | |  | | STRING | | 150 |
| Configuration Item Name | |  | | | | User-friendly name of the CI | | |  | | STRING | | 192 |
| Service Group | |  | | | | Defines the service group for the work order, for example: IT, production, facility, or fleet. | | |  | | STRING | | 8 |
| CI Business Impact | |  | | | | How important is this CI to your business processes? The lower the number the more critical it is to your business process. | | |  | | INTEGER | | 12 |
| Service | |  | | | | Defines the service for the work order, for example: customer support, painting, print, telecommunications, and welding. | | |  | | STRING | | 8 |
| Outage | |  | | | | The outage level experienced by the primary CI target | | | It should contain the following values   * Degradation * None * Offline | | STRING | | 192 |
| Inspector | |  | | | | Inspector responsible for the work, measurement or observation. | | |  | | STRING | | 30 |
| Measurement Point | |  | | | | The point number on the asset for which the measurement is taken. | | |  | |  | |  |
| Target Start | |  | | | | Date the work is targeted to begin. | | |  | | DATETIME | | 10 |
| Target Finish | |  | | | | Date the work is targeted to be completed. | | |  | | DATETIME | | 10 |
| Scheduled Start | |  | | | | Date and time the work is scheduled to begin. | | |  | | DATETIME | | 10 |
| Scheduled Finish | |  | | | | Date and time the work is scheduled to completed. | | |  | | DATETIME | | 10 |
| Start No Earlier Than | |  | | | | The earliest date at which work should start. Scheduled dates should be after this date. | | |  | | DATETIME | | 10 |
| Finish No Later Than | |  | | | | The date that work should be completed by. Scheduled dates should be before this date. | | |  | | DATETIME | | 10 |
| Actual Start | |  | | | | Date and time the work was actually started. | | |  | | DATETIME | | 10 |
| Actual Finish | |  | | | | Date and time the work was actually completed. | | |  | | DATETIME | | 10 |
| Estimated Duration | |  | | | | Estimated time needed to complete the work. | | |  | | DOUBLE | | 8 |
| Time Remaining | |  | | | | Number of remaining hours needed to complete the work order. Maximo calculates the value from the Duration minus the number of hours worked so far. You can modify this value until the work order is closed. | | |  | | DOUBLE | | 8 |
| Predecessors | |  | | | | A non-persistent field to display the work orders predecessor work orders. | | |  | | STRING | | 256 |
| Task Target | |  | | | | We can relate Assets, CIs, Collections and Relationships in this table | | |  | |  | |  |
| **Labor tab** | | | | | | | | | | | | | |
| Task | |  | | | | Identifies the task for the planned craft or labor. | | |  | | INTEGER | | 12 |
| Vendor | |  | | | | Identifies the vendor or contractor, by company code, which will supply the labor resources. | | |  | | STRING | | 12 |
| Regular Hours | |  | | | | Number of labor hours required to complete the work. | | |  | | DOUBLE | | 8 |
| Craft | |  | | | | Identifies the craft. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 8 |
| Labor Contract | |  | | | | Identifies the contract with the vendor that will supply labor resources. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 8 |
| Rate | |  | | | | Hourly pay rate for the labor or craft. Maximo copies this data from the Labor table. If you modify this field, Maximo recalculates the Line Cost field on the Labor sub tab, and the Current Estimate Labor Cost in the View Costs dialog box. You can edit this field if the work order's status allows work plan labor edits. Work Order editing rules are set up in the Organizations application. | | |  | | DOUBLE | | 10 |
| Skill Level | |  | | | | Skill level associated with the craft. You can edit this field if the work order's status allows work plan labor edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 15 |
| Quantity | |  | | | | The required quantity of individuals | | |  | | INTEGER | | 12 |
| Line Cost | |  | | | | The calculated cost for the craft or labor. Maximo derives the value as: Regular Hours multiplied by the Rate plus any premium pay defined. | | |  | | DOUBLE | | 10 |
| Line Price | |  | | | | Estimated price for this labor transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding labor transaction record. | | |  | | DOUBLE | | 10 |
| Labor | |  | | | | Identifies the labor planned for the work order task. | | |  | | STRING | | 8 |
| Rate Changed | |  | | | | Indicates whether a user has overwritten the value in the Rate field. If the check box is cleared (the default), and the labor's rate or the labor contract has changed since the labor was planned, Maximo overwrites the Rate field on approval. If the check box is selected, Maximo does not overwrite the Rate field on approval. | | |  | | BOOLEAN | | 1 |
| Outside | |  | | | | Specifies if the planned labor is associated with a vendor | | |  | | BOOLEAN | | 1 |
| **Materials Tab:** | | | | | | | | | | | | | |
| Task | |  | | | | Task | | |  | | INTEGER | | 12 |
| Line Type | |  | | | | Identifies the type of material, for example, item, material, service, special order or external catalog item. | | |  | | STRING | | 15 |
| Item | |  | | | | Identifies the item. If you enter an item that is defined as a hazardous material in Inventory, Maximo inserts hazard information on the Safety Plans tab. | | |  | | STRING | | 30 |
| Quantity | |  | | | | Number of items you need for the task. If you modify this field, Maximo recalculates the Line Cost field on the Materials subtab, and the Current Estimate Material Cost on the View Costs dialog box. You can edit this field if the work order's status allows work plan material edits. Work order editing rules are set up in the Organizations application. | | |  | | DECIMAL | | 15 |
| Order Unit: | |  | | | | Order unit for the item | | |  | | STRING | | 16 |
| Unit Cost: | |  | | | | Price of the item per unit at the time the work order was approved. | | |  | | DOUBLE | | 10 |
| Line Cost: | |  | | | | Total cost of the item. MAXIMO calculates this using the following formula: (quantity) x (unit cost). | | |  | | DOUBLE | | 10 |
| List Sales Price: | |  | | | | The item's list sales price. This price must be a positive value and can have decimals. | | |  | | DOUBLE | | 10 |
| Line Price: | |  | | | | Estimated price for this labor transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding labor transaction record. | | |  | | DOUBLE | | 10 |
| Storeroom | |  | | | | Storeroom location of the item. You can edit this field if the work order's status allows work plan materials edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 12 |
| Storeroom Site: | |  | | | | Identifies the site in which the storeroom is located. | | |  | | STRING | | 8 |
| Direct Issue? | |  | | | | Specifies whether you obtain the item directly from a purchase or from a storeroom. If you clear the check box (the default), you obtain the item from a storeroom and you must enter a value in the Storeroom field. When the work order is approved, Maximo reserves the item in inventory. If you select the check box, the item will be purchased for the approved work order when you use the Reorder Direct Issue Items/Services in the Inventory application. You can edit this field if the work order's status allows work plan materials edits. Work order editing rules are set up in the Organizations application. | | |  | | BOOLEAN | | 1 |
| Vendor: | |  | | | | Identifies the suggested vendor for the item. If the Direct Issue? Check box is selected, you can edit this field if the work order's status allows work plan material edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 12 |
| Stock Category: | |  | | | | Specifies whether the item is a stocked (STK), non-stocked (NS), or a special order (SP) item. | | |  | | STRING | | 16 |
| Condition Code: | |  | | | | Identifies the condition of the item planned for the work. | | |  | | STRING | | 30 |
| PR | |  | | | | Purchase requisition on which this direct issue item is ordered. | | |  | | STRING | | 8 |
| PR Line: | |  | | | | Line number on the purchase requisition for the item. | | |  | | INTEGER | | 12 |
| Issue To: | |  | | | | Labor or craft to whom to issue the item or material. | | |  | | STRING | | 8 |
| Required Date: | |  | | | | Date you require the item. If the Direct Issue? check box is selected, you can edit this field if the work order's status allows work plan material edits. Work order editing rules are set up in the Organizations application. | | |  | | DATETIME | | 10 |
| Requested By: | |  | | | | Identifies the person requesting the item. | | |  | | STRING | | 30 |
| Condition Rate: | |  | | | | Condition's rate expressed as a percentage. For example, a condition code of NEW would have 100 as the condition rate (in percent), while a condition code of FAIR might have 50 as the condition rate. | | |  | | DECIMAL | | 8 |
| Condition Enabled? | |  | | | | Specifies whether this item has a value or worth you want to assign and track based on its physical condition. You can apply different rates to an item as its condition changes from use, such as from new to used. If the check box is selected, you must assign at least one full value (100%) condition code for this item, and any other codes you assign must be a percentage of that. If the check box is cleared (the default), the physical condition of the item is not tracked. | | |  | | BOOLEAN | | 1 |
| **Services Tab:** | | | | | | | | | | | | | |
| Task | |  | | | | Identifies the task to which the service applies. | | |  | | INTEGER | | 12 |
| Line Type | |  | | | | Identifies the type of service, for example standard service (one that is used repeatedly, such as grounds maintenance or installation), or a service (a single-type purchase or not used often enough to maintain a vendor catalog for it, such as painting). | | |  | | STRING | | 15 |
| Quantity | |  | | | | Quantity of the service for the work plan task. | | |  | | DECIMAL | | 15 |
| Order Unit | |  | | | | Order unit for the item | | |  | | STRING | | 16 |
| Unit Cost | |  | | | | Cost of the service at the time the work order is approved. | | |  | | DOUBLE | | 10 |
| Line Cost | |  | | | | Calculated value. Maximo calculates the value using the following formula: Quantity x Unit Cost. | | |  | | DOUBLE | | 10 |
| List Sales Price | |  | | | | The item's list sales price | | |  | | DOUBLE | | 10 |
| Line Price | |  | | | | Estimated price of this service transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding service transaction record. | | |  | | DOUBLE | | 10 |
| Vendor | |  | | | | Suggested vendor from whom to order the service. | | |  | | STRING | | 12 |
| PR | |  | | | | The total of the prices for all of the asset, configuration item or location attribute values based on the prices specified of attribute pricing in this price schedule. | | |  | | DOUBLE | | 10 |
| PR Line | |  | | | | Line number on the purchase requisition for the service. Maximo populates this field after the work order is approved and you reorder direct issue items and services in the Inventory application. | | |  | | INTEGER | | 12 |
| Issue To | |  | | | | Identifies the Labor or Craft to whom the service will be issued. | | |  | | STRING | | 8 |
| Required Date | |  | | | | Date and time the service is needed. | | |  | | DATETIME | | 10 |
| Requested By | |  | | | | Identifies the person requesting the service. | | |  | | STRING | | 30 |
| Service | |  | | | | Identifies the standard service. | | |  | | STRING | | 30 |
| **Tools Tab:** | | | | | | | | | | | | | |
| Task | |  | | | | Task | | |  | | INTEGER | | 12 |
| Tool | |  | | | | Identifies the tool. | | |  | | STRING | | 30 |
| Quantity | |  | | | | Quantity of the tool required for the planned work. | | |  | | DECIMAL | | 15 |
| Tool Hours: | |  | | | | Number of hours for which the tool will be used for the work. | | |  | | DURATION | | 8 |
| Rate | |  | | | | Hourly rate for the tool. If you modify this field, Maximo recalculates the Line Cost field on the Tools subtab, and the Current Estimate Tool Cost in the View Costs dialog box. You can edit this field if the work order's status allows work plan tool edits. Work Order editing rules are set up in the Organizations application. | | |  | | DOUBLE | | 10 |
| Line Cost: | |  | | | | The calculated cost for the tool. Maximo derives the value as: (Tool Hours) x (Rate). | | |  | | DOUBLE | | 10 |
| List Sales Price: | |  | | | | List Sales Price | | |  | | DOUBLE | | 10 |
| Line Price: | |  | | | | Estimated price of this tool transaction. The application calculates this value using the rules for the associated price schedule. The application updates this value when you change the corresponding tool transaction record. | | |  | | DOUBLE | | 10 |
| Reservation Required? | |  | | | | Specifies whether the technician will need to get the tool from a storeroom (make a reservation) or provide it himself. If the check box is cleared (the default), no reservation is required. If the check box is selected, a reservation is required. When you select the Reservation Required check box, you must specify the storeroom from which to get the tool. | | |  | | BOOLEAN | | 1 |
| Storeroom | |  | | | | Storeroom location of the tool. You can edit this field if the work order's status allows work plan tool edits. Work order editing rules are set up in the Organizations application. | | |  | | STRING | | 12 |
| Storeroom Site: | |  | | | | Identifies the site in which the storeroom is located. | | |  | | STRING | | 8 |
| Issue To: | |  | | | | Identifies the labor to which the tool is issued | | |  | | STRING | | 8 |
| Rate Changed? | |  | | | | Indicates whether a user has overwritten the value in the Rate field. If the check box is cleared (the default), and the tool's rate has changed since the tool was planned, Maximo overwrites the Rate field on approval. If the check box is selected, Maximo does not overwrite the Rate field on approval. | | |  | | BOOLEAN | | 1 |
| **Log Tab** | | | | | | | | | | | | | |
| Change | |  | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Owner | |  | | | | The person currently responsible for the change. | | |  | | STRING | | 30 |
| Status | |  | | | | Status of the change, for example waiting on material, waiting for approval, in progress, completed, or closed. | | |  | | STRING | | 16 |
| Owner Group | |  | | | | The group currently responsible for the change. | | |  | | STRING | | 8 |
| Summary | |  | | | | Description of the change work order. | | |  | | STRING | | 320 |
| Details | |  | | | | Long Description for Work Order Description | | |  | | STRING | | 32,000 |
| **Service Address Tab** | | | | | | | | | | | | | |
| Release | |  | | | | Identifies the change work order. | | |  | | STRING | | 10 |
| Organization | |  | | | | Organization Identifier | | |  | | STRING | | 8 |
| Site | |  | | | | Site Identifier | | |  | | STRING | | 8 |
| **Address Information Section:** | | | | | | | | | | | | | |
| Service Address | |  | | | | The address code identifies a service address. It must be unique by site for each service address. | | |  | | STRING | | 12 |
| Formatted Address | |  | | | | This address is formatted according to the map provider's requirements and is updated when a location is found on the map tab. You can use the formatted address to search for addresses on the map tab. | | |  | | STRING | | 150 |
| Street Address | |  | | | | The street address details of the service address, such as the house number, the street direction prefix, and the name of the street. Additional details can include the type of street, the street direction suffix, and whether the address is an apartment, a unit, or a suite. | | |  | | STRING | | 115 |
| Address Line 2 | |  | | | | Optional additional service address information. | | |  | | STRING | | 56 |
| Address Line 3 | |  | | | | Optional additional service address information. | | |  | | STRING | | 56 |
| City | |  | | | | The city of the service address. | | |  | | STRING | | 36 |
| Region/District | |  | | | | The region or district of the service address. | | |  | | STRING | | 36 |
| County | |  | | | | The county of the service address. | | |  | | STRING | | 36 |
| State/Province | |  | | | | The state or the province of the service address. | | |  | | STRING | | 25 |
| Zip/Postal Code | |  | | | | The postal code of the service address. | | |  | | STRING | | 12 |
| Country | |  | | | | The country of the service address. | | |  | | STRING | | 3 |
| GEO Code | |  | | | | GEO code for calculation of sales tax. | | |  | | STRING | | 11 |
| Time Zone | |  | | | | The time zone of the service address. | | |  | | STRING | | 28 |
| Latitude(Y) | |  | | | | The measurement, in degrees, that the service address is north or south of the equator. Latitude is used with longitude to locate a place on a map. You must specify latitude in decimal degrees. | | |  | | DECIMAL | | 18 |
| Longitude(X) | |  | | | | The measurement, in degrees, that the service address is east or west of the prime meridian. Longitude is used with latitude to locate a place on a map. You must specify longitude in decimal degrees. | | |  | | DECIMAL | | 18 |
| Reference Point | |  | | | | A reference point to help to locate the service address, for example, '300 feet behind large red outbuilding.' | | |  | | STRING | | 50 |
| Directions | |  | | | | Directions to help locate the service address. | | |  | | STRING | | 500 |
|  | | | | Customer Information Section: | | | | | | | | | |
| Customer | |  | | | | The primary customer for the specified configuration item, asset (if no customer is associated with the configuration item), or location (if no customer is associated with the asset or configuration item). You can change the value in this field. | | |  | | STRING | | 12 |
| Agreement | |  | | | | Identifies the customer agreement. | | |  | | STRING | | 12 |
| Revision | |  | | | | Revision number of the customer agreement. | | |  | | INTEGER | | 12 |
| Price Schedule | |  | | | | Identifies the price schedule that applies to this release. | | |  | | STRING | | 10 |
| **Pricing Agreement Billing Status Section:** | | | | | | | | | | | | | |
| Customer PO Required? | |  | | | | Specifies whether the agreement requires a customer purchase order (PO) for billable work. If the check box is selected, a PO is required. | | |  | | BOOLEAN | | 1 |
| Customer PO Number | |  | | | | Number of the customer purchase order that authorizes this work. | | |  | | STRING | | 25 |
| Notify if Price Exceeds | |  | | | | Maximum price that you can charge for this work. You must notify customer if the price will exceed this double. | | |  | | DOUBLE | | 10 |
| Bill Batch | |  | | | | Number of the bill batch. | | |  | | STRING | | 12 |
| Unbilled Transactions on Work Order | |  | | | | Indicates whether there are transactions on the work order that have not been copied to a bill batch. | | |  | | BOOLEAN | | 1 |
| Bill Batch Status | |  | | | | The current or new status of the bill batch. | | |  | | STRING | | 12 |
| Bill Line Status | |  | | | | Depending on the application or dialog box, the current or new status of the bill line. Valid values are in the BILLLINESTATUS domain. | | |  | | STRING | | 12 |

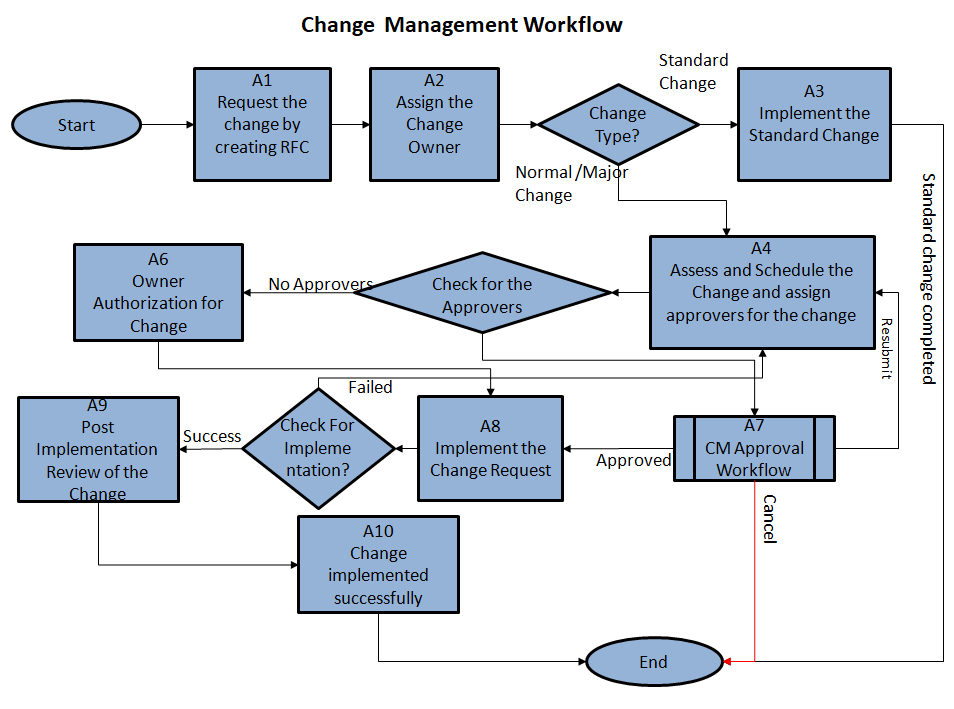
## Notification Matrix

Notification represents the email messages triggered automatically based on some condition. Following table summarizes various notification configured and the condition to trigger them

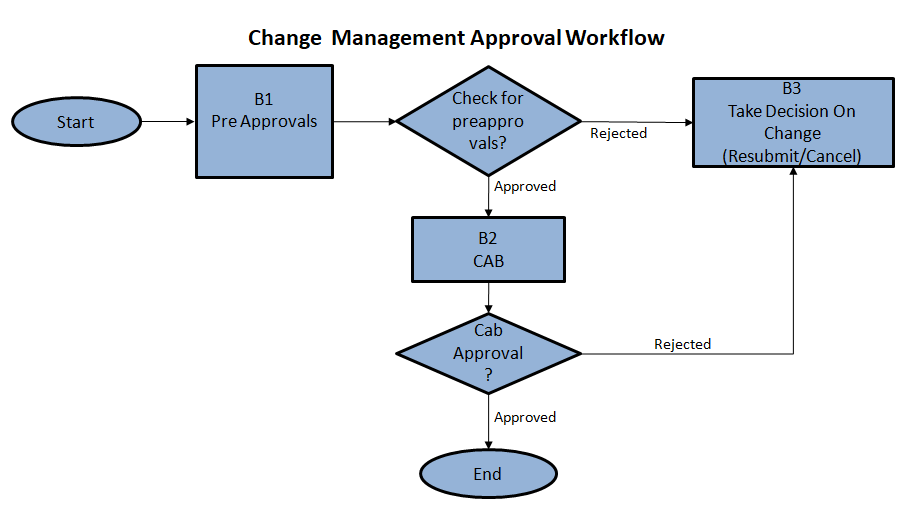
|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Scenarios | Role | Recipients | email Contents Template | |
| Subject Line | Email Body |
| When the Workflow is assigned to the owner | Change Coordinator | Owner of the RFC | RFC XXX has been assigned to you | Dear XXXX(Name of the Change Owner),  ***Confirmation***! Your Change Request has been Received for further processing.  Click on the link to go directly to the record. http://:HOSTNAME/maximo/ui/maximo.jsp?event=loadapp&value=:APP&uniqueid=:OWNERID  YYYY(Name of the Change Coordinator)  Job Title  Change Coordinator | |
|  |  |  |  |  | |
|  |  |  |  |  | |

# Workflow





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| --- | --- | --- | --- |
| Activity Number | Responsible Role | Activity Description | Status |
| **Major/Normal Change work flow** | | | |
| A1 | Change Requestor | Change will be created by Application team and Network team. These teams will be part of Change Requestor group  Change Requestor will take ownership while creating Change Request  If he takes ownership, he will be owner of this change | Assess |
| A2 | Change Requestor | If Change Requestor hasn’t taken ownership in activity A1, he needs to assign Change Owner to this change | Assess |
| A4 | Change Owner | If change type is not ‘Standard Change’, Change Owner does assessment and selects the schedule dates for this change.  Change Owner can select Pre Review, CAB & Post Implementation Approvers.  These Approvers need to take action on this Change | Schedule |
| A5 | System | If Change has Approvers, it goes to activity A7 otherwise it goes to activity A6 | Authorize |
| A6 | Change Owner | Change Owner will authorize the Change and send for implementation | Authorize |
| A7 | Sub Process | If Change has Approvers, Sub Process will be executed | Authorize |
| A8 | Change Owner | After approvals, implementation of the Change will be started.  Change Owner will be responsible for implementation | Implement |
|  | System | If implementation is success it goes to ‘Post Implementation Review’ activity, otherwise it goes to ‘Reschedule the Change’ activity | Implement |
| A9 | Post Implementation Review team | After implementation, post implementation review team will be reviewed the Change. | Review |
| A10 | Change Manager | After successful implementation and review, Change Manager will be closed the Change | Closed |
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|  |  |  |  |
| **Standard Change work flow** | | | |
| A1 | Change Requestor | Change will be created by Application team and Network team. These teams will be part of Change Requestor group  Change Requestor will take ownership while creating Change Request  If he takes ownership, he will be owner of this change | Implement |
| A2 | Change Requestor | If Change Requestor hasn’t taken ownership in activity A1, he needs to assign Change Owner to this change | Implement |
| A3 | Change Owner | If change type is ‘Standard Change’, Change Owner will be implemented this Change | Closed |



|  |  |  |  |
| --- | --- | --- | --- |
| Activity Number | Responsible Role | Activity Description | Status |
| **Change Management Approval work flow** | | | |
| B1 | Pre Approvals team | All members of the pre approvals team need to be approved.  If all are approved and CAB approvals required, request goes to activity B2 for CAB approvals.  If any one of them rejected the Change request, it goes to activity B2 for Change Manager decision | Authorize |
| B2 | CAB | All members of the CAB team need to be approved.  If all are approved, request goes to main flow.  If any one of them rejected the Change request, it goes to activity B2 for Change Manager decision | Authorize |
| B3 | Change Manager | If change is rejected by pre approvals team or CAB team, Change Manager will take decision whether the Change needs to be re-submitted or not.  If Change needs to be resubmitted, Change Manger will send it to Change Owner for resubmit.  If Change Manager wants to cancel the request, he can cancel the request. | Authorize |
|  |  |  |  |
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# Roles

|  |  |
| --- | --- |
| Role | Description |
| Change Requestor | Person who will raise a Change request |
| Change Owner | Owner of the Change |
| CAB Member | Member of Change Authority Board |
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# Reports & KPIs

**Reports of Change**

|  |  |
| --- | --- |
| Required Report | Report Content |
| Active IT Changes Grouped by Status | * Start Date * End Date |
| IT Changes Grouped by Classification | * WO Number * Description * status * Priority * Owner * Scheduled Start * Scheduled Finish * Actual Start * Actual Finish |
| Scheduled Implementation Tasks Grouped by Owner | * Task Number * Description * status * Scheduled Start * Scheduled Finish * Ancestor |
| Change Process Requests in New State by Age | * Ticket ID * Description * Reported by * Reported Date * Classification * Owner * Number of Days |
| IT Changes Targeting Configuration Items | * Change * Description * status * Type * Priority * Owner * Scheduled Start * Scheduled Finish * Actual Start * Actual Finish * Owner Group * Site |
| Scheduled Implementation Tasks Grouped by Supervisor | * Schedule Start Date * Schedule End Date |
| Status of Approved Changes | * Start Date * End Date * Change * Description * Status Approval State * Asset Description * CI Description * Reported Date * Scheduled Start * Scheduled Finish * Actual Start * Actual Finish * Class Description * Category |
| Changes by Status Value | * Start Date * End Date * Change * Description * Status * Asset Description * CI Description * Reported Date * Scheduled Start * Scheduled Finish * Actual Start * Actual Finish * Class Description |
| List of IMAC changes by owner group | * Change * Change Description * Owner Group * Status * Asset * CI * Reported Date * Scheduled Start * Scheduled Finish * Actual Start * Actual Finish * Class Description * Category |
| Changes by Failure Probability | * Start Date * End Date * Change * Owner * Status * Asset * CI * Reported Date * Scheduled Start * Scheduled Finish * Actual Start * Actual Finish * Class Description * Category * Summary * Failure Probability |

**KPI's of Change**

|  |  |  |
| --- | --- | --- |
| KPI Name | KPI Description | Metrics |
| PMCHGALLACTIVE | Total number of active Changes | Total number of active Changes |
| PMCHGACOSTE | Total Estimation Costs For All Changes | Total Estimation Costs For All Changes |
| PMRELCHGPERREL | Average number of changes per release | Average number of changes per release |
| PMCHGHCOSTAS | Total Actual Service Costs for All Changes | Total Actual Service Costs for All Changes |
| PMCHGPRCTCAN | Percentage of Changes cancelled | Percentage of Changes cancelled |
| PMCHGBCOSTA | Total Actual Costs For All Changes | Total Actual Costs For All Changes |
| PMCHGCCOSTEM | Total Estimated Material Costs For All Changes | Total Estimated Material Costs For All Changes |
| PMCHGBCOSTAL | Total Actual Labor Costs for All Changes | Total Actual Labor Costs for All Changes |
| PMCHGJCOSTALIC | Total Actual License Costs for All Changes | Total Actual License Costs for All Changes |
| PMRELREMTIC | Total number of outstanding requests to remove a change from a release | Total number of outstanding requests to remove a change from a release |

# Abbreviations

|  |  |  |
| --- | --- | --- |
| S. No. | Acronym | Description |
| 1 | OOB | Out of Box |
| 2 | CM | Change Management |
| 3 | ITIL | IT Infrastructure Library |
| 4 |  |  |