



# Asset Strategy Management



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# Chapter 1

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## Overview

### Topics:

- [Overview of the Asset Strategy Management \(ASM\) Module](#)
- [Access the ASM Overview Page](#)
- [Asset Strategy Management \(ASM\) Workflow](#)

# Overview of the Asset Strategy Management (ASM) Module

The APM Asset Strategy Management (ASM) module lets you create a strategy, which is a set of actions that represent a plan to optimize equipment and location performance to achieve business benefits.

Using ASM, you can create the following types of strategies:

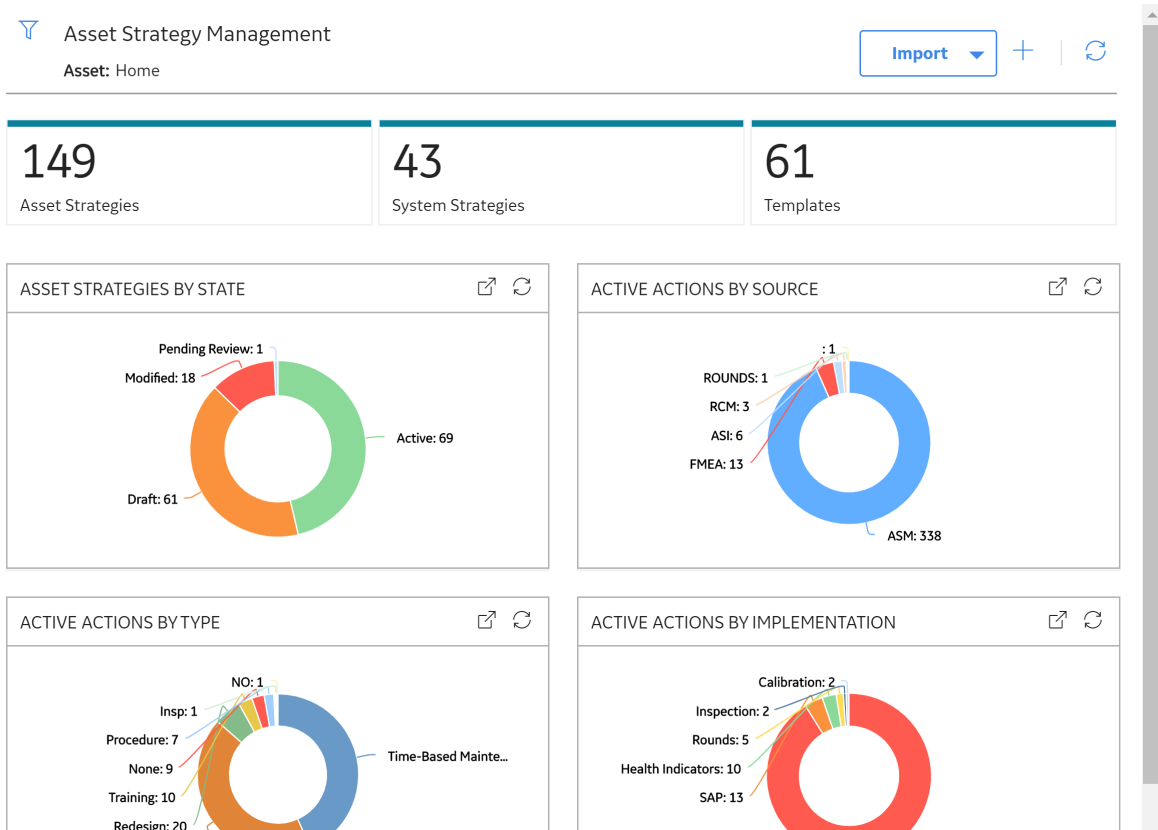
1. **Asset Strategy:** The combination of Actions and Risks that are associated with a piece of equipment or location.
2. **System Strategy:** A collection of Asset Strategies.

In other words, ASM allows you to create Asset Strategies to define ways in which equipment and locations can fail and the actions that you want to perform to prevent those failures and reduce their consequences. Once you have multiple Asset Strategies, you can bundle those Asset Strategies into a System Strategy.

## Access the ASM Overview Page

### Procedure

In the module navigation menu, select **Strategy > Asset Strategy Management**. The **ASM Overview** page appears.





The tabs at the top of the page summarize the number of strategies in various categories. You can select a tab to view the following information:

- **Asset Strategies:** A list of asset strategies.
- **System Strategies:** A list of system strategies.
- **Templates:** A list of all strategy templates.

The page contains the following charts:

- **Asset Strategies by State:** Plots the number of strategies in each state.
- **Active Actions by Source:** Plots the number of active actions from the active strategies based on the source of an action.
- **Active Actions by Type:** Plots the number of active actions of each type.
- **Active Actions by Implementation:** Plots the number of active actions based on implementation.

You can select  in the page to filter the information displayed on the **ASM Overview** page to a specific time range or asset. When you filter by an asset, the page displays information for the selected asset and the assets under it in the hierarchy. The Home level includes information not related to an asset or related to an asset not in the Asset Hierarchy.

**Note:** The **Asset Strategy Management Overview** page is not updated automatically when you return to the previously opened tab. You can select  to update the page.

## Asset Strategy Management (ASM) Workflow

This workflow provides the basic, high-level steps for using this module. The steps and links in this workflow do not necessarily reference every possible procedure. For more procedures, see the links in the Related Information section.

1. Evaluate asset risk and performance, which allows you to identify and quantify unmitigated risks. These evaluations will help you define how your current maintenance plans mitigate risks, identify gaps in your mitigation plans, and define the regulatory actions that are needed.
2. Mitigate risks with an action, which allows you to assess and document what is currently being done to mitigate risk as well as identify additional actions to mitigate risk.
3. Optimize mitigations, which allows you to review your current mitigation plan for areas that need to be improved, removed, or replaced.
4. Communicate improved plans, which includes updated strategies, improvements in risk reduction, and return on investment values.
5. Implement the strategy, which allows you to implement your new strategy into your work management system. The items implemented can involve, but are not limited to:
  - Recommended Actions.
  - Processes to measure strategy effectiveness.
  - Documentation of the decision making process behind the strategy.
  - A communication plan for receiving feedback from workers in the field.
6. Execute the strategy, which allows you to execute work via your company's current work management system and processes.

# Chapter 2

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## Workflow

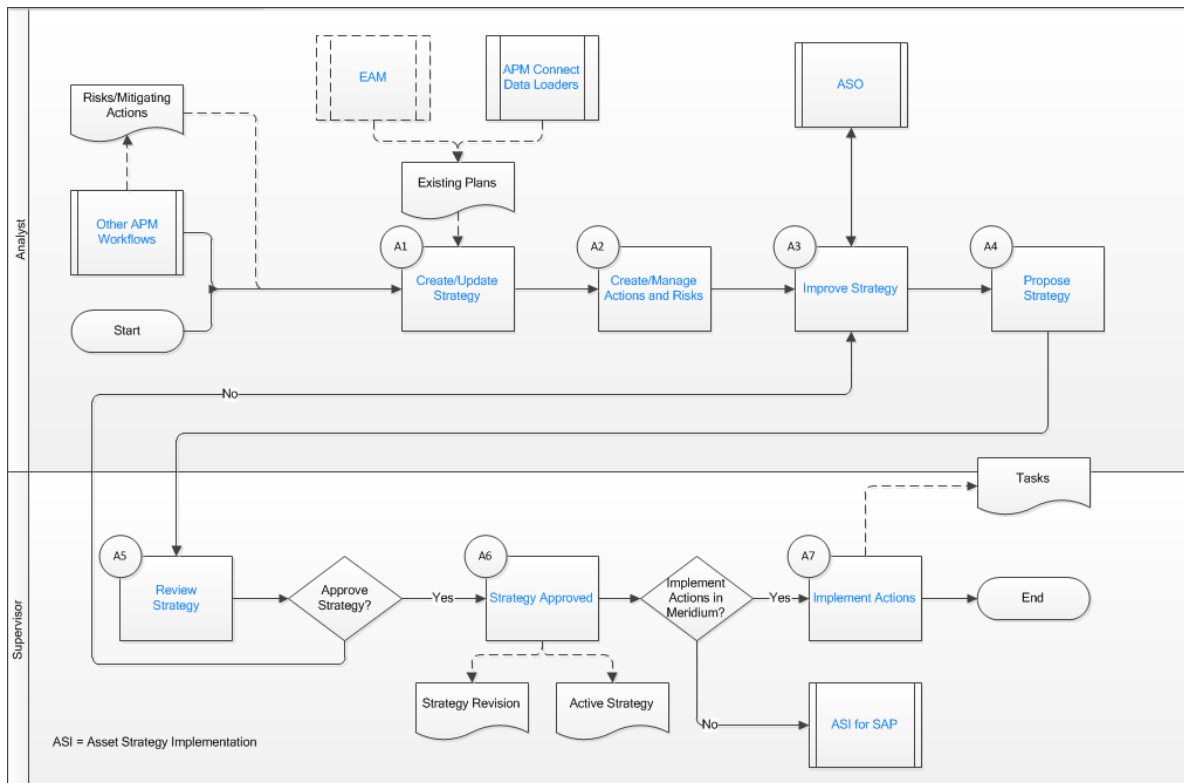
### Topics:

- [APM Strategy: Asset Strategy Management Workflow](#)
- [Other Workflows](#)
- [EAM](#)
- [APM Connect Data Loaders](#)
- [Create/Update Strategy](#)
- [Create/Manage Actions and Risks](#)
- [Improve Strategy](#)
- [Asset Strategy Optimization \(ASO\)](#)
- [Propose Strategy](#)
- [Review Strategy](#)
- [Strategy Approved](#)
- [Implement Actions](#)
- [ASI for SAP](#)

## APM Strategy: Asset Strategy Management Workflow

This workflow describes the process of creating a strategy, which is a set of actions that represent a plan to optimize equipment and location performance to achieve business benefits.

In the following workflow diagram, the blue text in a shape indicates that a corresponding description has been provided in the sections that follow the diagram. For more information, refer to the topic Interpreting the Workflow Diagrams.



## Other Workflows

Persona: Varies

These workflows produce Risks as well as Mitigating Actions that can be pushed to ASM to build a strategy. They include:

- RCM: Evaluates a system with respect to its individual function to determine how to avoid functional failures.
- FMEA: Focuses on equipment and functional locations, analyzing how each could fail and the effect of the failures.
- RBI: Allows you to analyze the risk of an asset's failing in certain mechanisms, and then to create an inspection strategy for each mechanism.
- SIS/Hazards: Assesses the integrity of safety instrumented systems, identifies hazards, assesses hazard risks, and provides solutions for mitigating safety risks.

Go to the RCM/FMEA Workflow.

## **EAM**

Persona: Analyst

Import data from your SAP system using the APM Connect EAM connection adapters. Strategy data imported from your SAP system can then be manipulated directly in the APM ASM module.

## **APM Connect Data Loaders**

Persona: Analyst

Import data from external sources into the various APM modules using the APM Connect Data Loaders. The ASM Strategy Data Loader enables the import of strategies, which can be manipulated in APM.

Go to the Data Loaders workflow.

## **Create/Update Strategy**

Persona: Analyst

Asset Strategies can be created manually, created from existing plans, or promoted from existing methodologies such as RCM/FMEA, RBI, and SIS. The result is the ability to view all actions and mitigated risks.

## **Create/Manage Actions and Risks**

Persona: Analyst

Create, add, modify, and delete Risks, and then assess Unmitigated Risk. Create, add, modify, supersede, and delete Actions. Assign Actions to Risks, and then assess Mitigated Risk.

## **Improve Strategy**

Persona: Analyst

View all risks and mitigating actions to determine the best overall strategy for the asset or collection of assets. This can be performed manually using the Risk Analysis tool by assessing Risk Mitigation and Action Cost as well as by superseding Actions, or, as an optional step, by utilizing Asset Strategy Optimization (ASO).

## **Asset Strategy Optimization (ASO)**

Persona: Analyst

ASO allows the user to compare multiple strategy scenarios and select the preferred strategy to propose for approval.

## Propose Strategy

Persona: Analyst

Once the Team acts upon all proposed changes, the Analyst should propose an improved strategy to the Supervisor for review and approval.

## Review Strategy

Persona: Supervisor

Review a summary of changes to the strategy, including deltas on Action Cost and Risk Mitigation.

## Strategy Approved

Persona: Supervisor

After review, the Supervisor determines if the strategy should be approved for implementation. If the strategy is approved it becomes Active, with a revision history. If the strategy is not approved, it is sent back to the Analyst or Team for further analysis.

## Implement Actions

Persona: Supervisor

Can implement actions via the following:

- Calibration Task
- Health Indicator
- Inspection Task
- Lubrication Requirement
- Measurement Location
- Policy Instance
- EAM Work Request

## ASI for SAP

Persona: Supervisor

After a strategy is approved in ASM, the actions associated with the strategy can be implemented in APM, or they can be sent to ASI for SAP, where they are packaged as Work Management Items to export and implement in SAP.

# Chapter 3

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## Asset Strategies

### Topics:

- [About Asset Strategies](#)
- [About Recommended Actions in ASM](#)
- [Access an Asset Strategy](#)
- [Access a Master Strategy Template](#)
- [Create a Strategy](#)
- [Activate an Asset Strategy as Baseline](#)
- [Save a Strategy as a Template](#)
- [Delete an Asset Strategy](#)
- [Remove a Master Strategy Template](#)
- [Export an Asset Strategy](#)
- [Access Recommended Actions in ASM](#)
- [Add a Recommended Action](#)
- [Access Reference Documents](#)



## About Asset Strategies

An asset strategy is the combination of actions and risks that are associated with a piece of equipment or location. An asset strategy consists of the following:

- Multiple Risk records, which represent ways in which the piece of equipment or location can fail.
- Multiple Action records, which represent the physical actions that you want to perform to maintain the piece of equipment or location.
- Multiple Risk Assessment records, which represent the risk rank associated with a failure.

The first step in building an asset strategy is to create an Asset Strategy record. You can then further define the asset strategy by adding risks and actions. After your database contains one or more asset strategies, you can build [system strategies](#).

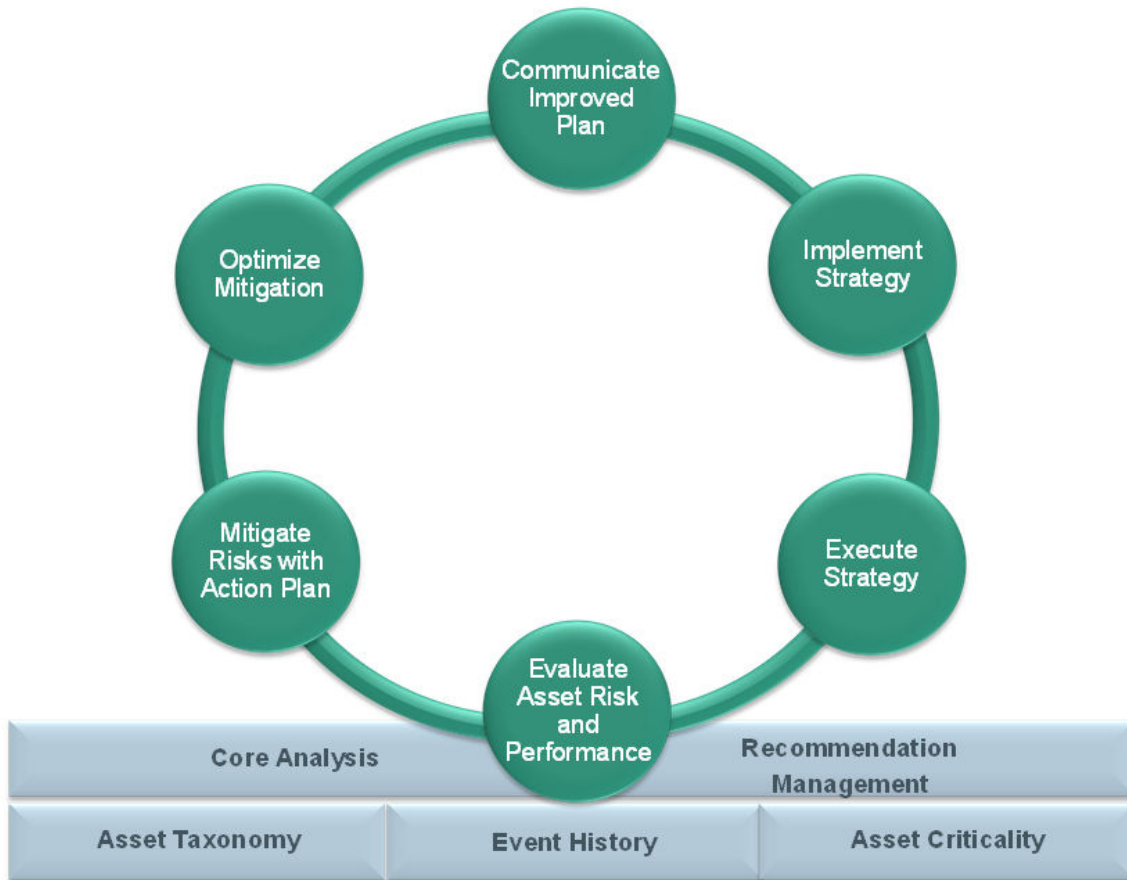
As shown in the [ASM data model](#), each Asset Strategy record is linked directly to:

- One Active Strategy record
- One Proposed Strategy record

The Active Strategy record and the records to which it is linked represent the strategy that you are currently using to maintain the piece of equipment or location. Likewise, the Proposed Strategy record and the records to which it is linked represent the strategy that you want to start using to maintain the piece of equipment or location.

In other words, for each asset strategy, there is always one active strategy and one proposed strategy.

The following image shows an illustration of how the steps in the Asset Strategy Work Process relate to one another. Each step in the work process is represented by a green circle. In addition, you can see that the entire work process is built upon the APM basic components, which are represented by the blue boxes.

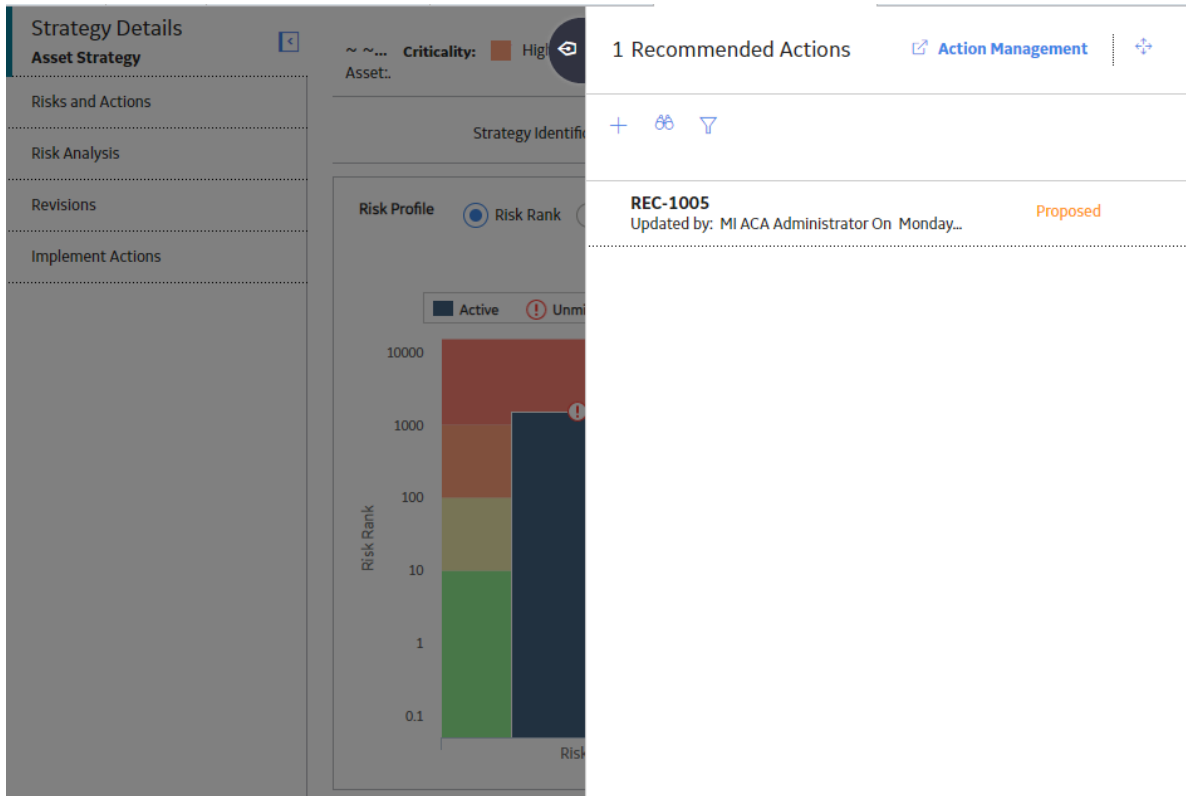


Within the APM product, each of the steps listed above can be accomplished using one or more of the following modules:

- [Asset Strategy Management \(ASM\)](#)
- [Asset Strategy Implementation \(ASI\)](#)
- [Reliability Centered Maintenance \(RCM\)](#)
- [Failure Modes and Effects Analysis \(FMEA\)](#)

## About Recommended Actions in ASM

Recommended Actions are used in ASM to provide up-to-date information regarding how a strategy is performing. They provide the basis for any modifications necessary to keep the strategy optimized and current.



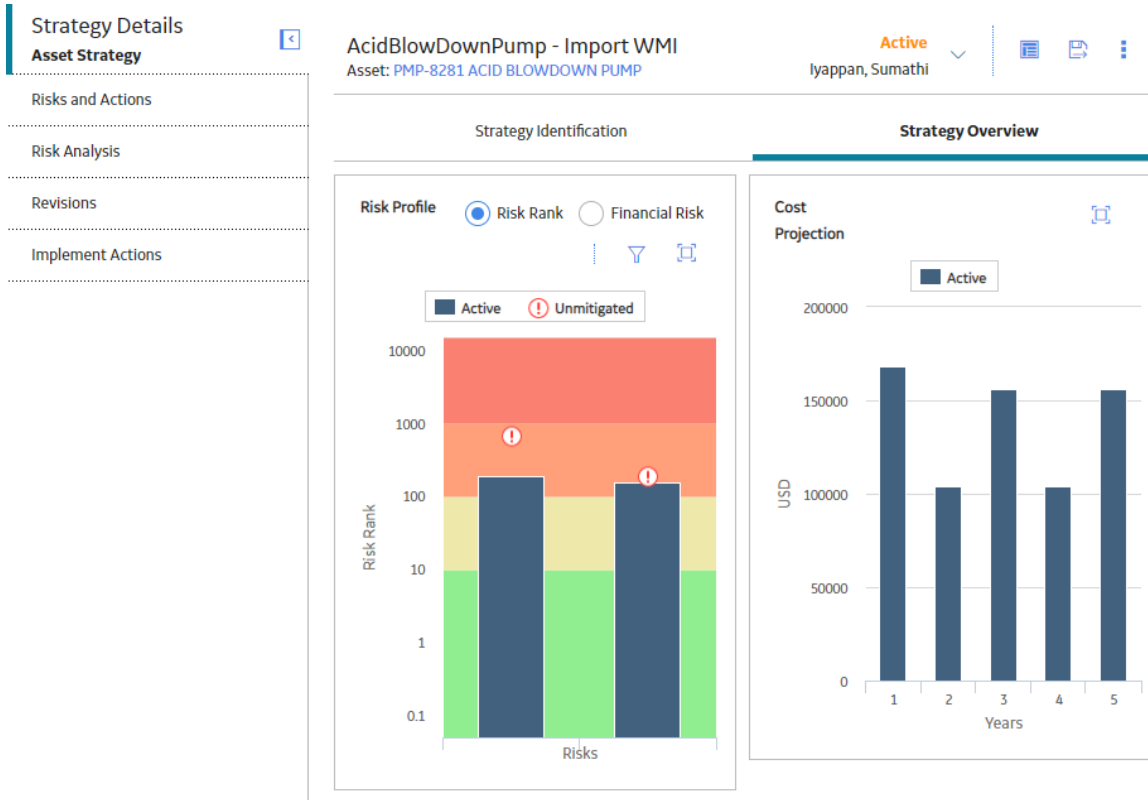
Recommended Actions provide the greatest value when the user is in the **Actions** page. The user can compare the findings from the inspector or engineer with the strategy Actions, to determine if the Tasks derived from those Actions are effective.



**Tip:** For information about additional options available when working with the Recommendation records, refer to the Action Management section of the documentation.

## Access an Asset Strategy

### Procedure


1. Access the [ASM Overview](#) page.
2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.
3. Select the strategy that you want to manage.  
The **Strategy Details** page for the strategy appears.



**Note:** Health status and criticality status indicators appear in the **Strategy Details** workspace. You can select the **Health** icon (for example, ) to access the health summary for the asset in a new page, and you can select the **Criticality** icon (for example, ) to access the ACA for the asset in a new page. If the asset strategy has no linked Health Indicator or ACA records, no indicators will appear on the strategy.

## Access a Master Strategy Template

### Procedure

1. Access the **Asset Strategy** for which you want to access the associated master strategy template. The workspace for the selected asset strategy appears.
2. In the workspace, select , and then select **Go To Master**. The workspace for the master strategy template associated with the select asset strategy appears.

Strategy Details  
**Strategy Template**

- Controlled Strategies (0)
- Risks and Actions
- Risk Analysis
- Revisions

AcidBlowDownPump - Import WMI - Template  
 Last modified by Super User, Baseline on 09/25/2019 16:22:49

Draft  
 Not Assigned

Template Identification

Template Overview

**Note:** The **Go To Master** option does not appear if the selected asset strategy is not associated with a master strategy template.

**Next Steps**

- [Remove a Master Strategy Template](#)

# Create a Strategy


**Procedure**

1. Access the **ASM Overview** page.
2. In the page, select **+**, and then select **Create Asset Strategy**. The **Enter Parameter Values** window appears.
3. In the **Asset** section, select **▲**. The **Hierarchy** window appears, displaying the asset hierarchy.
4. Select a hierarchy level associated with the asset to which you want to assign a strategy, and then select **Done**.

**Note:** You can search through both Hierarchy and Groups by selecting the respective tabs in the **Hierarchy** window.

The assets associated with the hierarchy level appear in the **Select Asset** window.

5. Select the asset to which you want to assign a strategy, and then select **OK**. The **Strategy Details** workspace appears, displaying the datasheet for the strategy.

6. As needed, enter values in the [available fields](#).
7. Select .  
Your strategy is created and saved.

#### Next Steps

- [Create a Risk or Action](#)

## Activate an Asset Strategy as Baseline

### Before You Begin

This topic assumes that you have a pre-existing asset strategy in the Draft state.

**Tip:** Reference the following topic if you want to [create a new asset strategy](#) before you start this set of instructions.

There are two activate operations in ASM:

- **Baseline:** This is mostly used to approve existing strategies for assets without going through the Pending Review state.
- **Propose:** This allows the asset strategy to go through a review workflow so that the strategy can be modified before it is activated.

### Procedure

1. [Access an asset strategy](#).
2. Select the asset strategy you want to activate as Baseline.  
The **Strategy Details** workspace for the selected asset strategy appears.

Strategy Summary

Risks and Actions

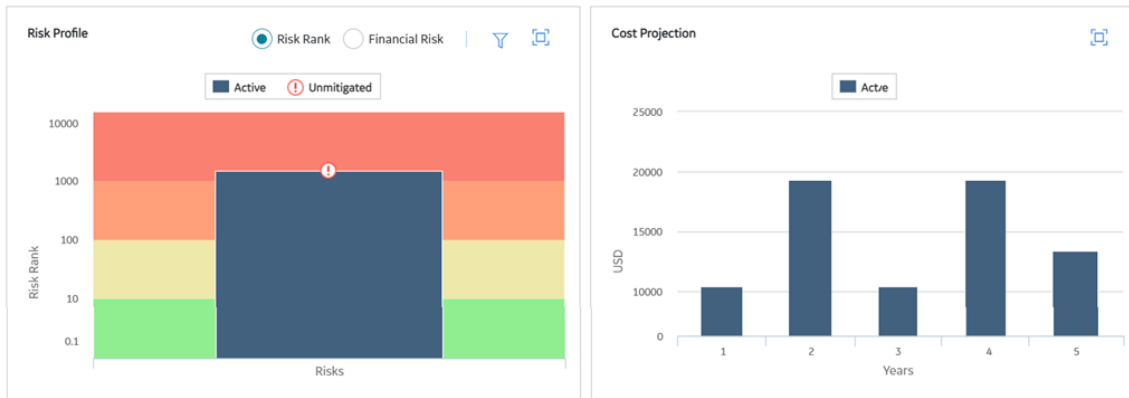
Risk Analysis

Implement Actions

Revisions


Summary

Details



Actions of Active Strategy

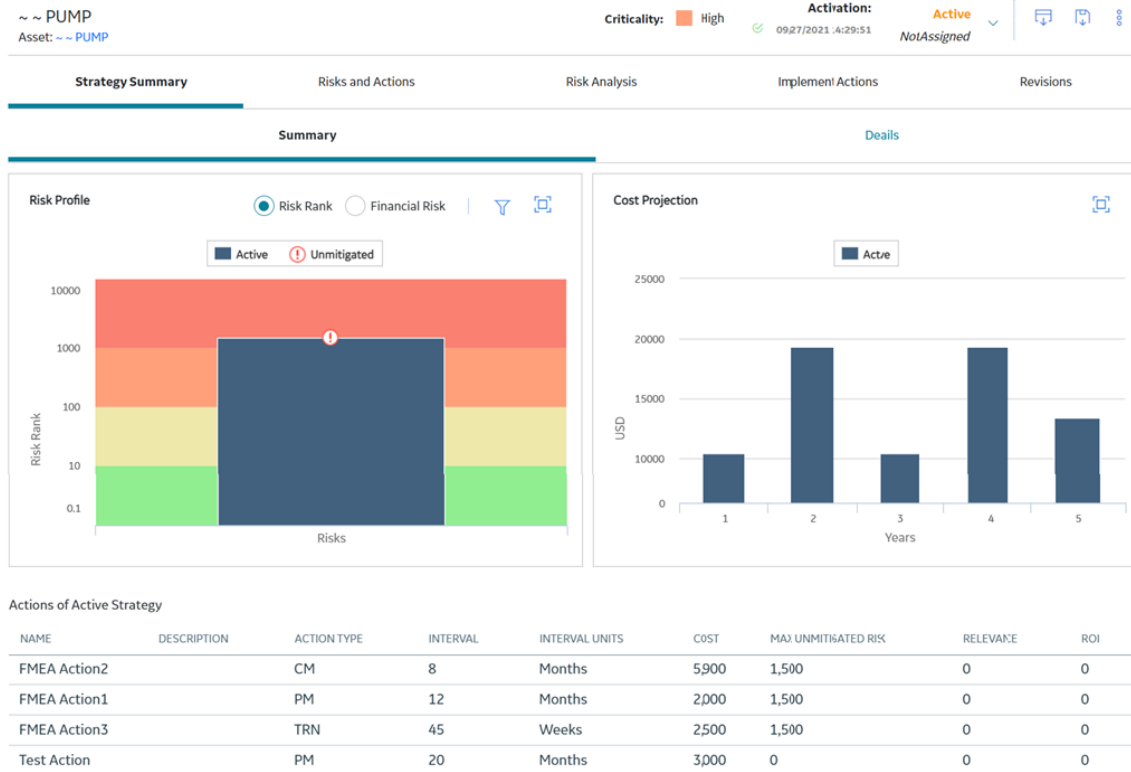
NAME	DESCRIPTION	ACTION TYPE	INTERVAL	INTERVAL UNITS	COST	MAX UNMITIGATED RISK	RELEVANCE	ROI
FMEA Action2		CM	8	Months	5,900	1,500	0	0
FMEA Action1		PM	12	Months	2,000	1,500	0	0
FMEA Action3		TRN	45	Weeks	2,500	1,500	0	0
Test Action		PM	20	Months	3,000	0	0	0

3. In the workspace, select , then select **Baseline**, and then select **Done**.  
A window appears, asking you to confirm the proposed changes to the strategy.
4. Select **Yes**.  
You will receive a notification that the strategy is activated.

## Save a Strategy as a Template

### Procedure

1. [Access an asset strategy](#).
2. Select the asset strategy which you want to save as a template.  
The **Strategy Details** workspace for the selected strategy appears.



3. Select .


A template is created based on the strategy and a new tab appears containing the details for the new template.


**Note:**

- A strategy can only be saved as a template if its state is Active.
- The secondary actions that are defined for the actions in the strategy are also applied to the template.

## Delete an Asset Strategy

**Procedure**


1. Access the [ASM Overview](#) page.
2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.
3. Select the row containing the asset strategy that you want to delete, and then, in the upper-left corner of the section, select   
The **Confirm Delete** dialog box appears, asking you to confirm that you want to delete the asset strategy.
4. Select **Yes**.  
The asset strategy is deleted.

**Note:** You can also delete the strategy using the delete button () while viewing the strategy that you want to delete.



# Remove a Master Strategy Template

## Procedure

1. Access the **Asset Strategy** from which you want to remove the associated master strategy template. The workspace for the selected asset strategy appears.
2. In the workspace, select  and then select **Remove From Master**. A **Confirm Remove from Master** dialog box appears, asking you to confirm that you want to remove the asset strategy from the master strategy template.

**Note:** The **Remove from Master** option does not appear if the selected asset strategy is not associated with a master strategy template.

3. Select **Yes**.  
The association with the master strategy template is removed.

# Export an Asset Strategy

## Procedure

1. Access the **ASM Overview** page.
2. Select the **Asset Strategies** tab.
3. Select one or more strategies that you want to export.  
The selected strategies are highlighted.




Asset Strategy Management Import ▾ + | ↻

Asset: Home

150  
Asset Strategies

43  
System Strategies

61  
Templates

+  

<input checked="" type="checkbox"/> (5)	STRATEGY ID	CRITICALITY	ASO ANALYSIS ID	STATE	LAST UPDATED DATE
<input checked="" type="checkbox"/>	~ ~ PUMP	<span style="color: orange;">■</span> High	~ ~ PUMP Optimiza...	Modified	05/25/2017 20:35:20
<input checked="" type="checkbox"/>	~ ~ QA RBI ASM 581 WKFLOW	<span style="color: gray;">■</span> Undefined		Draft	06/25/2016 02:34:46
<input checked="" type="checkbox"/>	~ ~ QA RBI LINK EXISTING TASK	<span style="color: gray;">■</span> Undefined		Draft	06/01/2020 14:23:15
<input checked="" type="checkbox"/>	~ ~ RBI COMP HAS ACC BY ASM...	<span style="color: gray;">■</span> Undefined		Draft	03/31/2016 02:27:42
<input checked="" type="checkbox"/>	~ #1 DEPROP. O.H. COND. ~ HX...	<span style="color: orange;">■</span> High		Draft	04/26/2010 22:00:57
<input type="checkbox"/>	~ #1 STEAM REHEATER ~ HXST ...	<span style="color: orange;">■</span> High		Draft	09/04/2015 02:02:39
<input type="checkbox"/>	~ #4 SULFUR CONDENSER ~ H...	<span style="color: red;">■</span> Very High		Draft	04/26/2010 22:00:59
<input type="checkbox"/>	~ #4 SULFUR CONDENSER ~ H...	<span style="color: orange;">■</span> High		Draft	05/05/2010 23:28:50
<input type="checkbox"/>	~ 3000-MERD-1000	<span style="color: red;">■</span> Very High		Active	03/28/2017 03:45:22
<input type="checkbox"/>	~ CLARIFIED OIL/COLD FEED ~ ...	<span style="color: gray;">■</span> Undefined		Active	07/31/2015 04:02:41
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY....	<span style="color: yellow;">■</span> Medium		Active	03/04/2017 00:19:02

4. Select .  
The **Export to a File** window appears.

Export to a File

---

Please provide a File Name

[Cancel](#) [Export](#)


5. In the **Please provide a File Name** box, enter a file name for the export.
6. Select **Export**.  
The selected Asset Strategies are exported.

**Note:** All the Secondary Actions associated with the primary actions in the strategy are also exported.

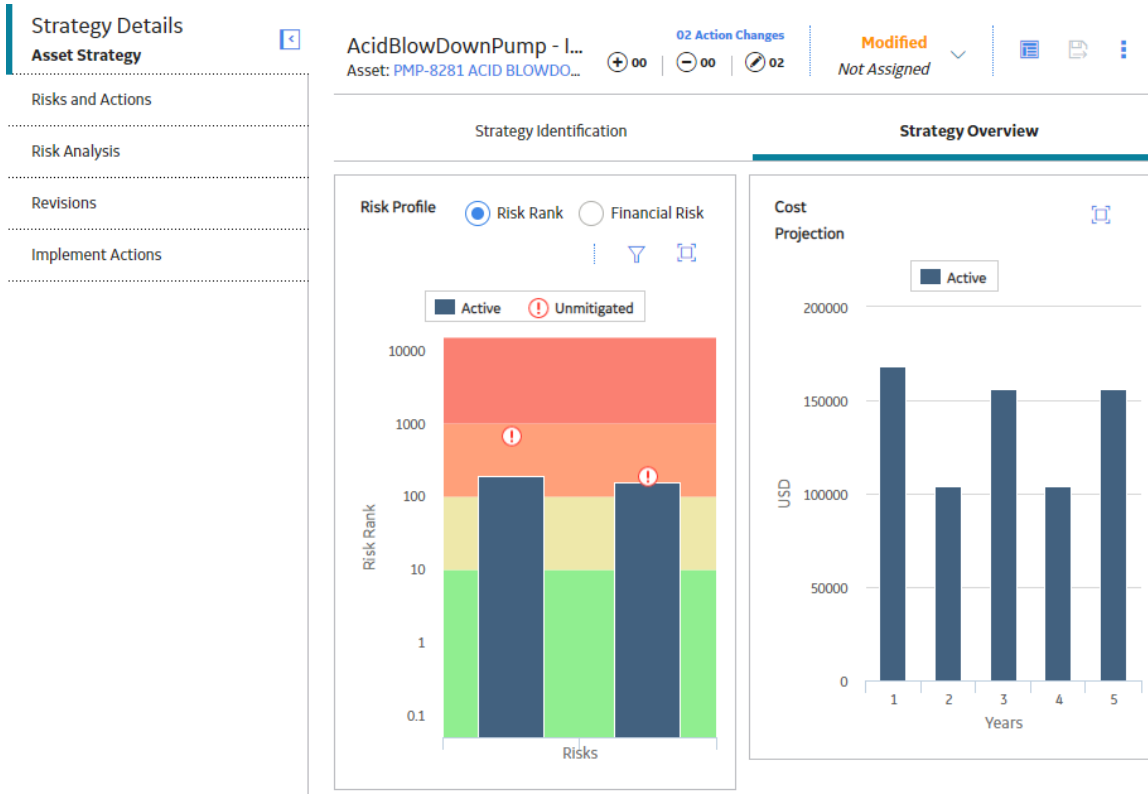
## Access Recommended Actions in ASM

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available strategies.

**Note:** You can access Action Management by selecting  , and then selecting **Action Management** from the **Asset Strategies** section.

3. Select the asset strategy from which you want to access recommended actions.  
The **Asset Strategy** workspace appears.




- Select . The **Recommended Actions** pane expands.

**Tip:** For information about additional options available when working with recommendation records, refer to the Recommended Actions section of the documentation.

## Add a Recommended Action

### Procedure

- [Access Recommended Actions in ASM.](#)
- In the **Recommended Actions** pane, select . The recommendation appears in the pane, displaying the **Identification** section.

< New Recommendation: Draft +

---

**Identification** Linked Recommended Actions

---

Recommendation

Datasheet ID:

General Recommendation 📄 ⋮

---

General Information Alert

---

Recommendation ID


REC-10504

Recommendation Headline

Text input This field is required

Target Completion Date

This field is required 📅

3. As needed, enter values in the available fields.
4. Select .  
The recommended action is saved.


## Access Reference Documents

### About This Task

In the Asset Strategy module, you can add Reference Documents to the following record types:

- Asset Strategies
- Actions
- Risks
- System Strategies

### Procedure

1. Access a datasheet for the record type to which you want to add a Reference Document.
2. Select , and then select Reference Documents.  
The **Reference Document** workspace appears.

**Tip:** For more information, refer to the Reference Documents section of the documentation.

# Chapter 4

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## Active Strategies and Proposed Strategies

### Topics:

- [About Active Strategies and Proposed Strategies](#)
- [Access a System Strategy](#)
- [Create a System Strategy](#)
- [Activate an Asset Strategy as Baseline](#)
- [Approve an Asset Strategy as a Proposed Strategy](#)
- [Add an Existing Asset Strategy to a System Strategy](#)
- [View Action Changes in System Strategy](#)
- [Remove an Asset Strategy from a System Strategy](#)
- [Delete a System Strategy](#)

## About Active Strategies and Proposed Strategies

**Note:** The information in this topic also applies to Asset Strategy Templates, but is limited to Asset Strategies to simplify the discussion.

When reviewing the ASM data model, you will notice that each Asset Strategy record is linked directly to:

- One Active Strategy record.
- and-
- One Proposed Strategy record.

The Active Strategy record and the records to which it is linked represent the strategy that you are currently using to maintain the piece of equipment or location. Likewise, the Proposed Strategy record and the records to which it is linked represent the strategy that you want to start using to maintain the piece of equipment or location.

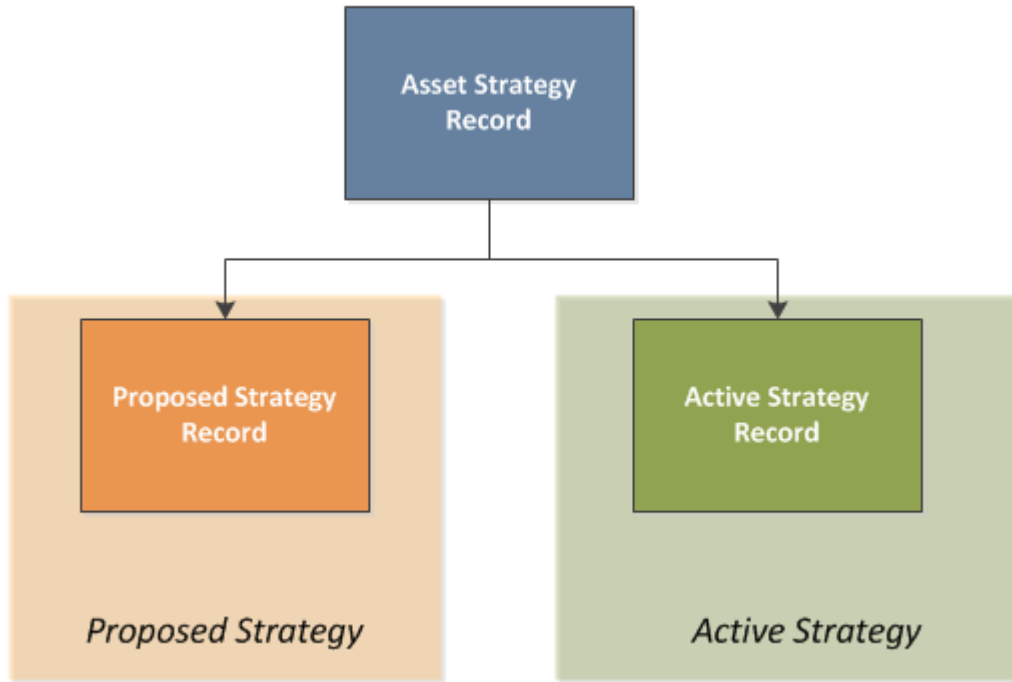
### Details

For each Asset Strategy, there is always one Active Strategy and one Proposed Strategy. Throughout this documentation, we refer to the following types of Asset Strategy:

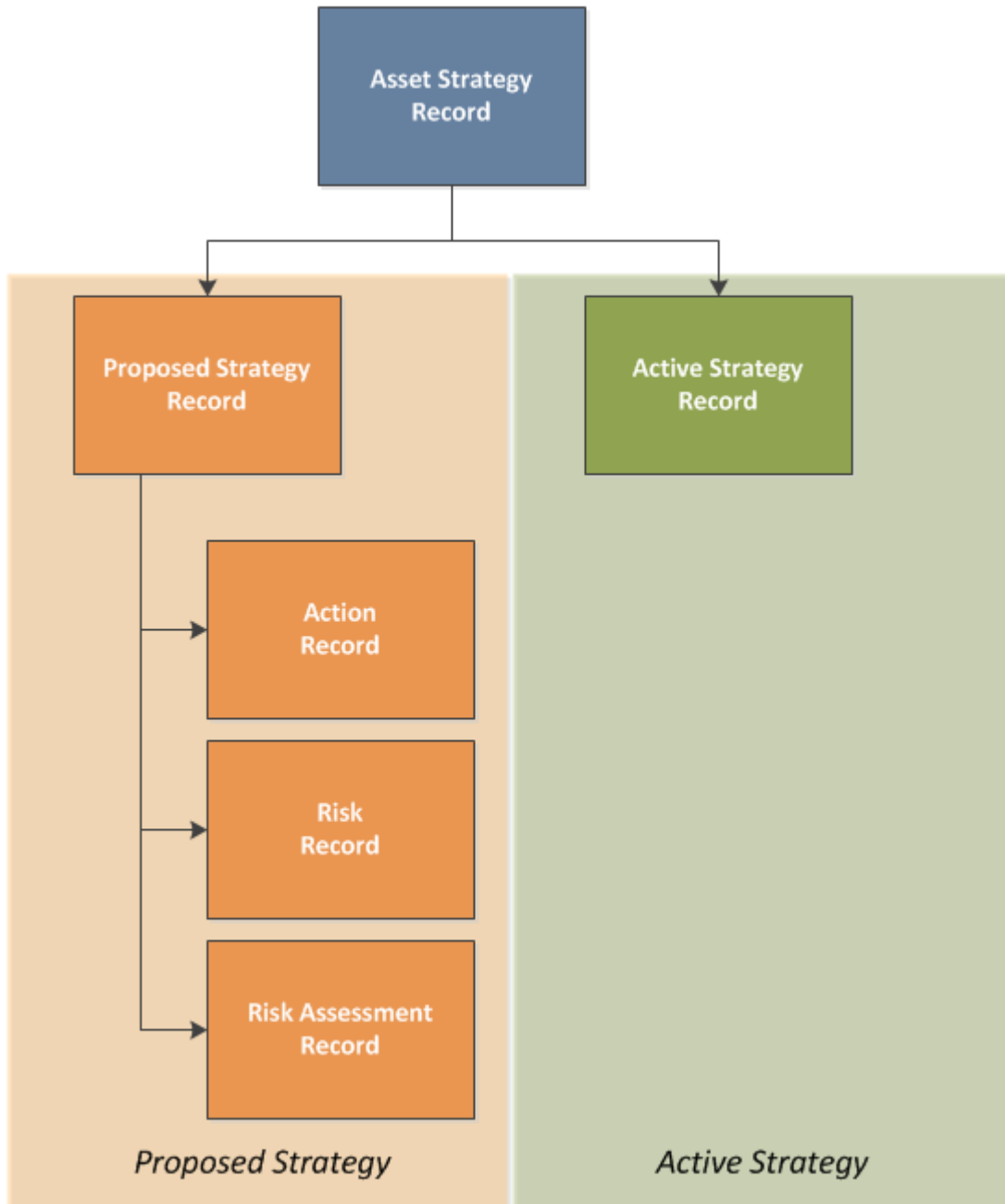
- **Active Strategy**: Represents the strategy that you are currently using to maintain the piece of equipment or location.
- **Proposed Strategy**: Represents the strategy that you want to start using to maintain the piece of equipment or location.

When you create an Asset Strategy, the Active Strategy and the Proposed Strategy are created automatically and are identical. As you make changes to the Asset Strategy by adding Risks and Actions and assessing the risk, those changes are stored in the Proposed Strategy. When you activate the Proposed Strategy, the contents of the Proposed Strategy are copied to the Active Strategy. Then, once again, the Active Strategy and Proposed Strategy are identical.

Consider the following image, which illustrates the Proposed Strategy and Active Strategy that are created when you create an Asset Strategy.



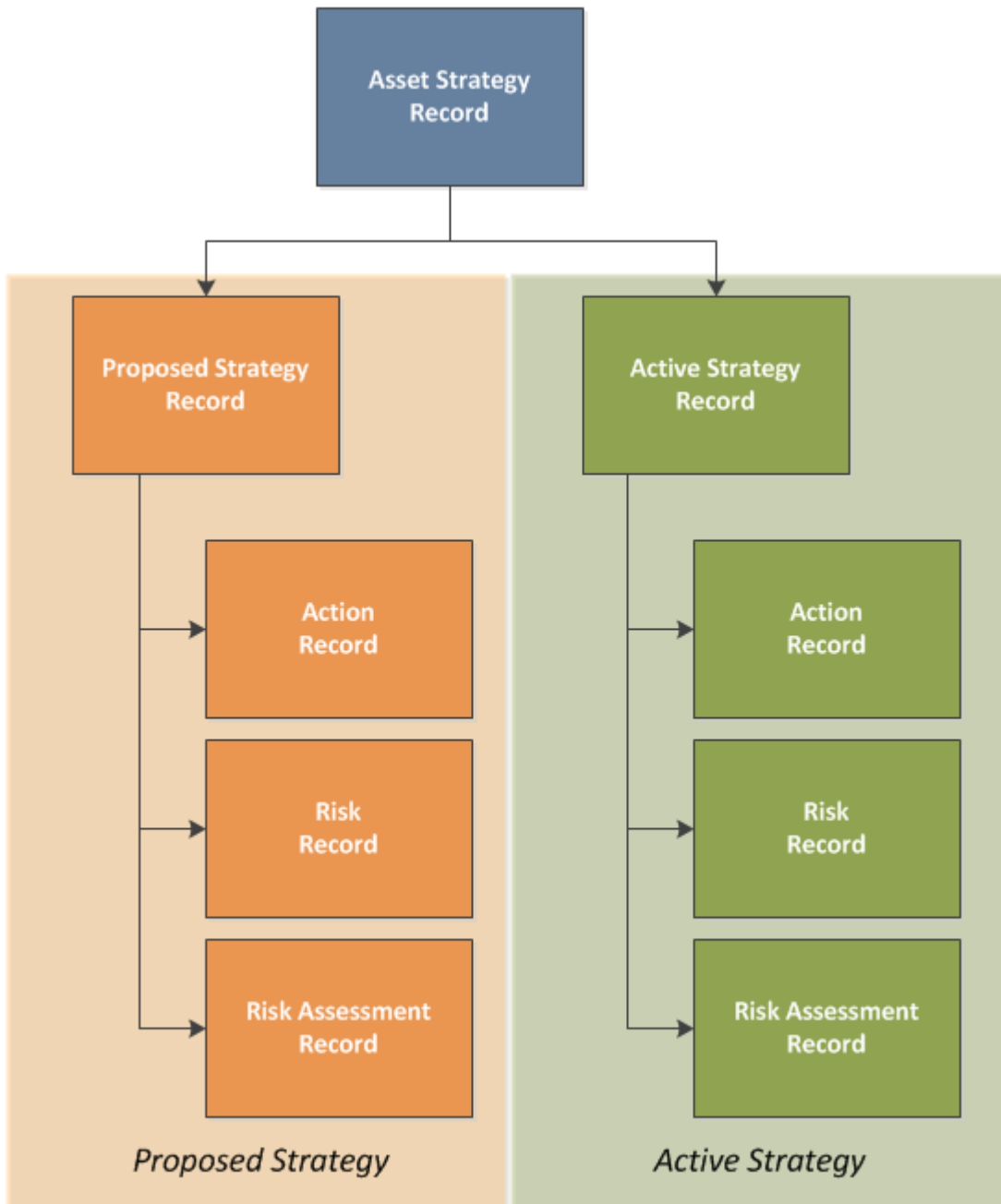
Now, consider the following image, which illustrates what happens to the Proposed Strategy when you add an Action, Risk, and Risk Assessment to the Asset Strategy.



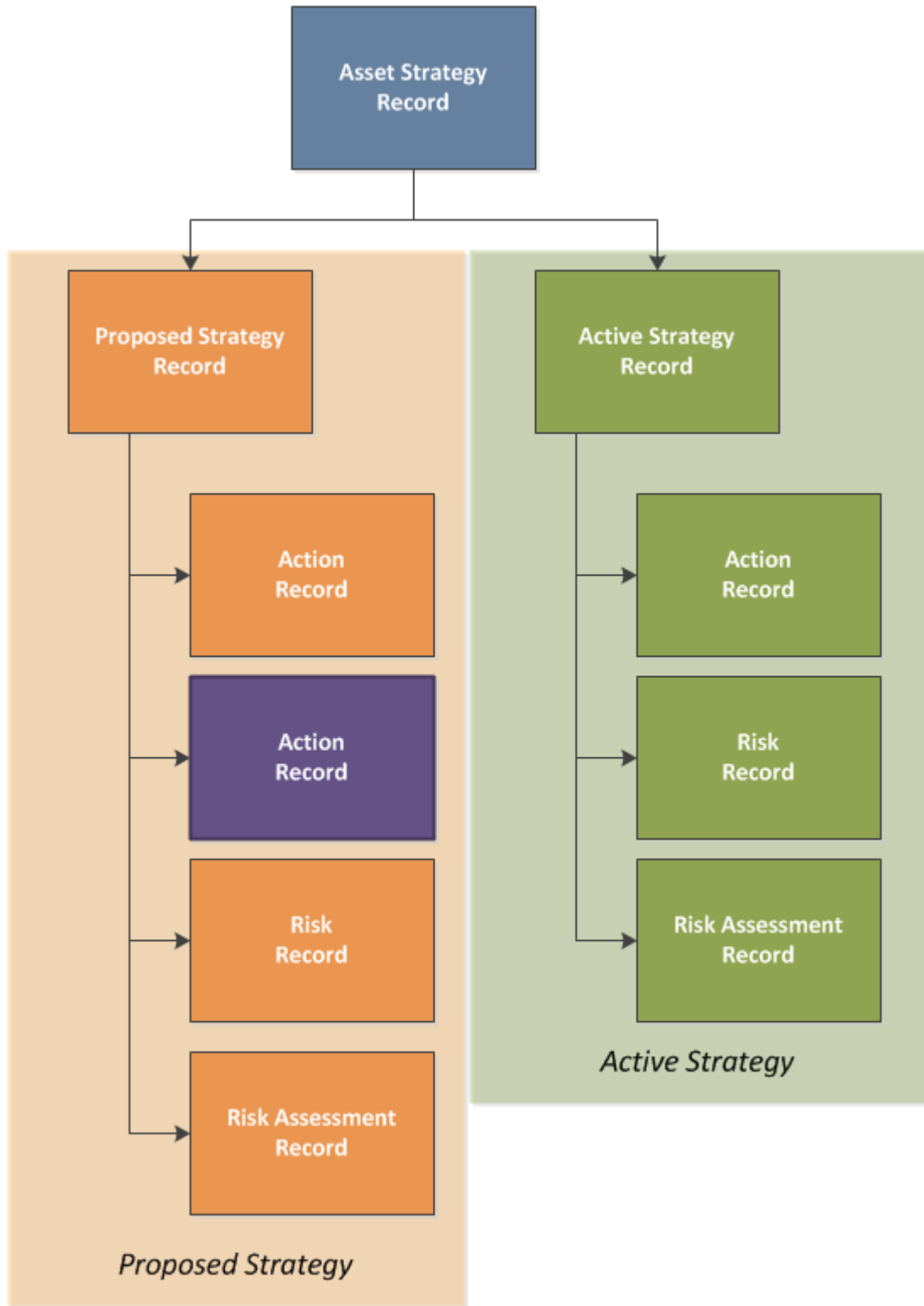
You can see from the preceding image that only the Proposed Strategy is affected. The Active Strategy remains unchanged.

Finally, consider the following image, which illustrates what happens when you activate the Proposed Strategy.





You can see from the preceding image that the Proposed Strategy and the Active Strategy are now identical again. The process would begin again if you were to modify the Asset Strategy in some way. For example, if you were to add a new Action, the following image illustrates how the Proposed Strategy would be updated, where the new Action is colored purple.



# Access a System Strategy

## Procedure

1. Access the [ASM Overview](#) page.
2. Select the **System Strategies** tab.  
A list of system strategies appears.

The screenshot shows the 'Asset Strategy Management' interface. At the top, there is a breadcrumb 'Asset: Home' and an 'Import' button. Below this are three summary cards: '149 Asset Strategies', '43 System Strategies' (which is highlighted), and '61 Templates'. The main content is a table with the following data:

STRATEGY ID	ASO ANALYSIS ID	LAST UPDATED DATE
<a href="#">ACA-01</a>		03/10/2010 23:53:23
<a href="#">ASI System strategy</a>		03/13/2009 23:37:07
<a href="#">ASO Large System 1</a>	<a href="#">ASO Large System 1 Optimization</a>	11/02/2016 14:23:09
<a href="#">ASO Large System 2</a>		05/19/2011 01:18:03
<a href="#">ASO Large System 3</a>		05/19/2011 00:54:27
<a href="#">ASO Medium System</a>		05/18/2011 00:27:16
<a href="#">ASO Simulation on System</a>	<a href="#">ASO Simulation on System Strategy</a>	02/15/2015 20:24:49
<a href="#">ASO System 1</a>		06/29/2010 10:47:55
<a href="#">ASO System 2</a>		06/29/2010 11:16:39
<a href="#">ASO System 3</a>		06/29/2010 10:32:46
<a href="#">ASO System 4</a>		06/29/2010 10:36:16

3. In the **Strategy ID** column, select the link for the system strategy that you want to view.  
The **Strategy Summary** workspace for the selected system strategy appears, displaying the **Summary** section. The following [charts](#) appear:
  - Risk Profile
  - Cost Projection



Summary

Details

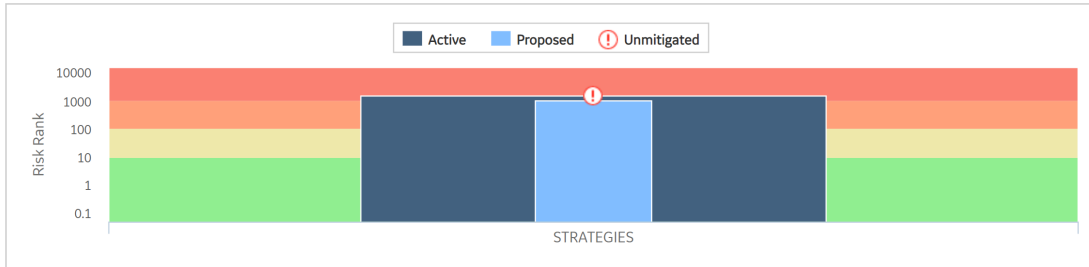
Manage

Implement

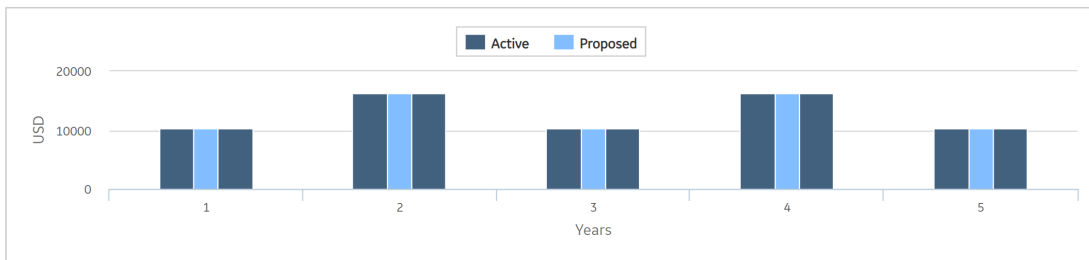
RISK PROFILE

Total Risk ↓ 33%

Risk Rank  Financial Risk




COST PROJECTION



## Create a System Strategy

### Procedure

1. Access the [ASM Overview](#) page.
2. In the page, select , and then select **Create System Strategy**. The new strategy appears in a new tab, displaying the **Details** section. The following image shows the **Details** section for a system strategy.



Summary

Details

Manage

Implement

Datasheet ID:

System Strategy

Site: Roanoke, VA

System ID:


ASO Simulation on System

Risk Analysis Type:

Simulation

Description:

This System has only one Asset and optimized at System level

- As needed, enter values in the available fields for a [system](#) strategy.
- Select .  
The strategy is created.

## Activate an Asset Strategy as Baseline

### Before You Begin

This topic assumes that you have a pre-existing asset strategy in the Draft state.

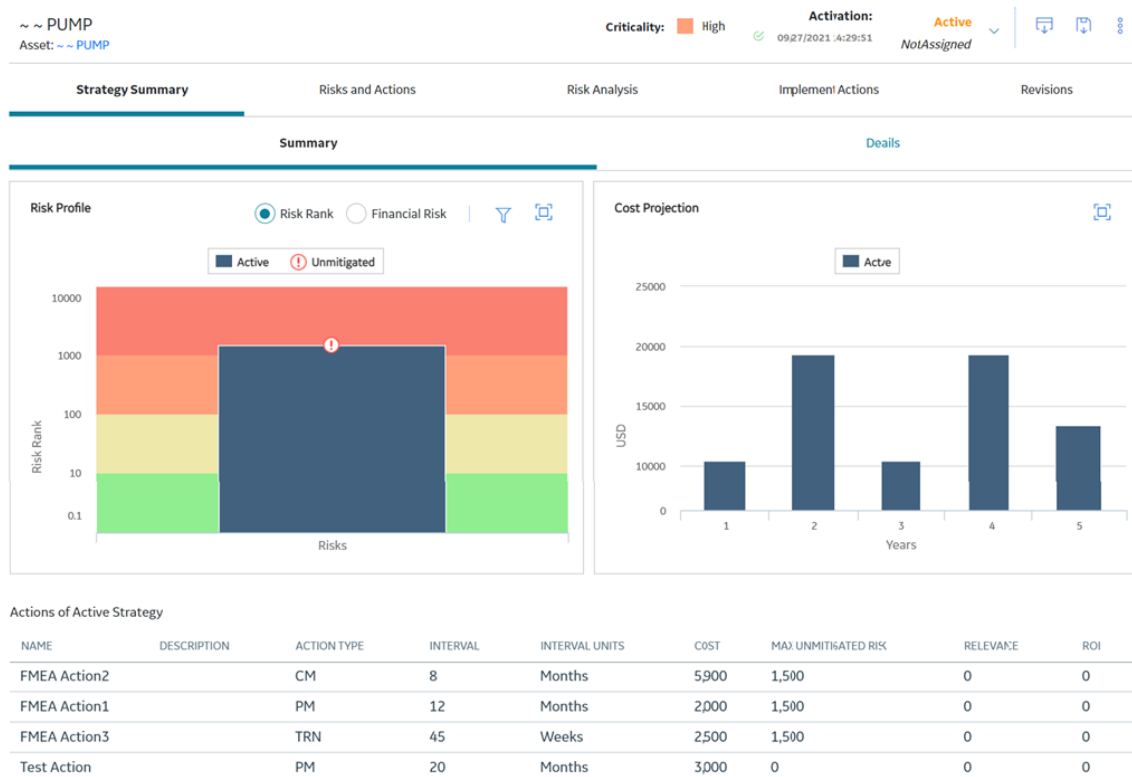
**Tip:** Reference the following topic if you want to [create a new asset strategy](#) before you start this set of instructions.


There are two activate operations in ASM:

- **Baseline:** This is mostly used to approve existing strategies for assets without going through the Pending Review state.
- **Propose:** This allows the asset strategy to go through a review workflow so that the strategy can be modified before it is activated.

### Procedure

- [Access an asset strategy.](#)
- Select the asset strategy you want to activate as Baseline.  
The **Strategy Details** workspace for the selected asset strategy appears.



- In the workspace, select , then select **Baseline**, and then select **Done**.  
A window appears, asking you to confirm the proposed changes to the strategy.

- Select **Yes**.  
You will receive a notification that the strategy is activated.

## Approve an Asset Strategy as a Proposed Strategy

### About This Task

This topic assumes that you have a pre-existing asset strategy in the Draft state.

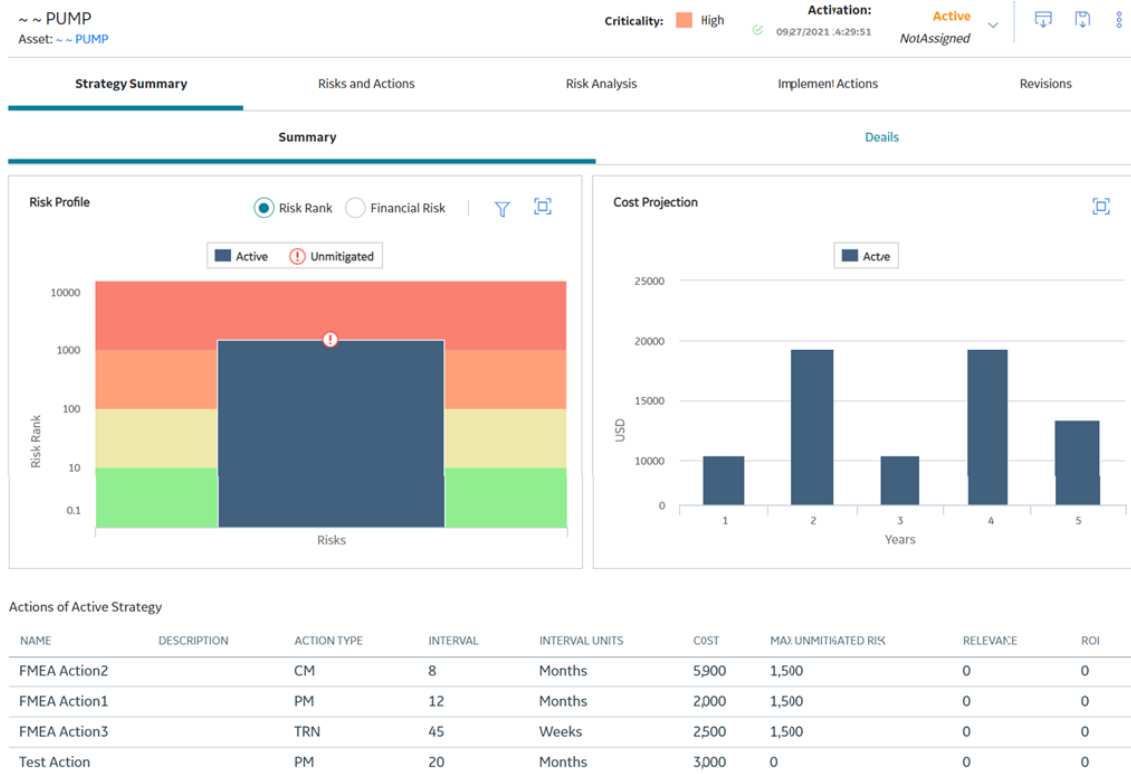
**Tip:** Reference the following topic if you want to [create a new asset strategy](#) before you start this set of instructions.


There are two activate operations in ASM:


- **Baseline:** This is mostly used to approve existing strategies for assets without going through the Pending Review state.
- **Propose:** This allows the asset strategy to go through a review workflow so that the strategy can be modified before it is activated.

### Procedure

- [Access an asset strategy.](#)
- Select the asset strategy you want to activate as Proposed.  
The **Strategy Details** workspace for the selected asset strategy appears.



- In the workspace, select , then select **Propose**, and then select **Done**.  
A message appears, asking you to confirm that you want to perform the Propose operation.
- Select **Yes**.  
The **Basis for Revision** text box appears.

5. Enter the basis for your revision, and then select **OK**.  
The asset strategy enters the **Pending Review** state.
  6. To make the strategy active, select , select **Make Active**, and then select **Done**.  
A window appears, asking you to confirm that you want to activate the strategy.
  7. Select **Yes**.  
The strategy is activated.
- Note:** If you want to rework a proposed strategy at any time after it is activated, select **Rework** from the strategy's state menu, and then select **Done**

## Add an Existing Asset Strategy to a System Strategy

### Before You Begin

This topic assumes that you have pre-existing asset strategies to add to your system strategy.

### Procedure


1. [Access the system strategy](#) to which you want to add an asset strategy.
2. Select the **Manage** tab.  
The **Manage** workspace appears.

ASO Simulation on System ⋮


Last modified by Sumathi Iyappan on 02/15/2015 20:24:49

---

Summary
Details
Manage
Implement




+



02 Action Changes

+00

-00

02

Not Assigned

⌵

	STRATEGY	CHANGES	STATUS	LAST UPDATED
<input type="checkbox"/>	> Simulation on Asset 1	2 Changes	Modified	2/15/2015

3. Select .  
The **Add Existing Asset Strategies** window appears.

Add Existing Asset Strategies

<input type="checkbox"/>	STRATEGY	DESCRIPTION	ASSET NAME	ASSET TYPE	STATE
<input type="checkbox"/>	PMP-3121 SPARE ...	This strategy was a...	PMP-3121 SPARE ...	Centrifugal Pump	Draft
<input type="checkbox"/>	Asset strategy link...	Asset strategy link...	~ Agitator ~ 10003...	Equipment	Active
<input type="checkbox"/>	Asset strategy link...	Asset strategy link...	01-B02-1 ~ Compr...	Functional Location	Active
<input type="checkbox"/>	Strategy ASI- asset...	Strategy with AHI d...	PMP-8276 SPENT ...	Centrifugal Pump	Active
<input type="checkbox"/>	AirCooler-AHI		HX-1514 AIR COOL...	Air Cooled Heat Ex...	Active
<input type="checkbox"/>	Asset strategy (ASI...	Asset strategy (ASI...	PMP-3830 DEETHA...	Centrifugal Pump	Active
<input type="checkbox"/>	AcidBlowDownPu...	Asset Strategy wit...	PMP-8281 ACID BL...	Centrifugal Pump	Modified
<input type="checkbox"/>	3.3.1 SP2 asset str...	3.3.1 SP2 asset str...	19-02900 INJECTI...	Piping Circuit	Active
<input type="checkbox"/>	PMP 8053 Strategy		PMP-8053 MTBE-M...	Centrifugal Pump	Draft

Rows per page 50  200 500 1 - 84 of 84 Results < 1 >

[Cancel](#) [Add](#)

- For each strategy that you want to add, select the check box, and then select **Add**. The asset strategy is added to the system strategy.

**Note:** The maximum number of asset strategies that can be added to a system strategy is 500.

## View Action Changes in System Strategy

### About This Task

This topic describes how to view the changes for all the actions in the system strategy.

### Procedure

- [Access the system strategy](#) for which you want to view the action changes.
- Select the **Manage** tab. The **Manage** workspace appears.

ASO Simulation on System  
Last modified by Sumathi Iyappan on 02/15/2015 20:24:49

Summary	Details	Manage	Implement
		02 Action Changes + ep ⊕00   ⊖00   🔄02 Not Assigned	
<input type="checkbox"/> (0)	STRATEGY	CHANGES	STATUS LAST UPDATED
<input type="checkbox"/>	> Simulation on Asset 1	2 Changes	Modified 2/15/2015



3. Select **Action Changes** to view the changes made to the actions in the system strategy. The **Action Changes** window appears.

Action Changes

---

🔍

STRATEGY	CHANGES	STATUS	LAST UPDATED
Simulation on Asset 1	2 Changes	Modified	2/15/2015

---

Changed Field	Previous Value	New Value	
<b>Mitigating Condition Based Actions</b>			Modified
ROI	949	1,006	Basis For Revision
Relevance	660	702.939990234375	
Max Unmitigated Risk	700	702.939990234375	
Detection Probability		100	
Duration		0	
Duration Units		Days	
<b>Mitigating Time Based Actions</b>			
ROI	0	335	
Relevance	0	702.939990234375	

Rows per page: 50  200 500

1 - 1 of 1 Results <  >

[Cancel](#)

## Remove an Asset Strategy from a System Strategy

This topic describes how to remove an asset strategy from a system strategy.

### Before You Begin

Only the owner of the strategy has the system permissions to delete a strategy.

### Procedure



1. [Access the system strategy](#) from which you want to remove an asset strategy.
2. Select the **Manage** tab.  
The **Manage** workspace appears, displaying a list of available strategies.

ASO Simulation on System ⋮

Last modified by Sumathi Iyappan on 02/15/2015 20:24:49


---



Summary	Details	Manage	Implement
		02 Action Changes	
<input type="checkbox"/> (0)	STRATEGY	CHANGES	STATUS
<input type="checkbox"/>	> Simulation on Asset 1	2 Changes	Modified
			LAST UPDATED
			2/15/2015

- For each strategy that you want to remove, select the check box.  
In the workspace,  is enabled.
- Select .
- A window appears, asking you to confirm that you want to remove the selected strategies from the parent strategy.
- Select **OK**.  
The selected strategy is removed.

## Delete a System Strategy

### Procedure

- Access the [ASM Overview](#) page.
- Select the **System Strategies** tab.  
The **System Strategies** section appears, displaying a list of system strategies.
- Select the row containing the strategy that you want to delete, and then, in the section, select .  
The **Confirm Delete** dialog appears, asking you to confirm that you want to delete the strategy.
- Select **Yes**.  
The strategy is deleted.

**Note:** You can also delete a strategy using the delete button () under  option while viewing the strategy that you want to delete.

# Chapter 5

---

## Asset Strategy Templates

### Topics:

- [About Asset Strategy Templates](#)
- [Create a Strategy Template](#)
- [Copy a Template in ASM](#)
- [Export an Asset Strategy Template](#)
- [Apply a Template to an Asset Strategy as a Copy](#)
- [Apply a Template as a Master to an Asset Strategy](#)
- [Access the Controlled Strategy View for Asset Strategy Templates](#)
- [Add an Existing Strategy to a Template](#)
- [Unlink Strategies in Templates](#)

## About Asset Strategy Templates

An Asset Strategy Template represents an Asset Strategy that you plan to reuse by applying it to additional Asset Strategies. The process of creating an Asset Strategy Template from scratch is almost identical to the process of creating an Asset Strategy. Additionally, you can create an Asset Strategy Template using an existing Asset Strategy.

When working with Asset Strategy Templates, you can add Action records and Risk records and manage Risk Assessments.

## Create a Strategy Template

### Before You Begin

Only an Asset Strategy Template whose state is Active can be selected for use in this procedure.

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Templates** tab.  
The **Templates** section appears, displaying a list of existing Asset Strategy Templates.

The screenshot shows the 'Asset Strategy Management' interface. At the top, there is a navigation bar with 'Asset: Home' and an 'Import' button. Below the navigation bar, there are three summary cards: '149 Asset Strategies', '43 System Strategies', and '61 Templates'. The 'Templates' card is selected. Below the cards is a table with the following columns: 'TEMPLATE ID', 'CONTROLLED STRATEGIES', 'CRITICALITY', 'DUTY', 'SERVICE', 'STATE', and 'LAST UPDATED DATE'. The table contains 12 rows of data, each with a checkbox in the first column.

<input type="checkbox"/> (0)	TEMPLATE ID	CONTROLLED STRATEGIES	CRITICALITY	DUTY	SERVICE	STATE	LAST UPDATED DATE
<input type="checkbox"/>	A12	0				Active	09/30/2013 15:07:30
<input type="checkbox"/>	A13	0				Active	09/30/2013 15:18:53
<input type="checkbox"/>	ASI AIR COOLER	0				Active	05/31/2008 02:07:29
<input type="checkbox"/>	ASI Bearing	0				Active	05/31/2008 02:08:15
<input type="checkbox"/>	ASI Power Supply	0				Active	05/31/2008 02:07:55
<input type="checkbox"/>	ASI Pressure Instrument	0				Draft	06/04/2008 22:02:05
<input type="checkbox"/>	ASI Switch	0				Active	05/31/2008 02:05:56
<input type="checkbox"/>	ASI tank	0				Active	06/03/2008 01:47:31
<input type="checkbox"/>	ASO L 10	0				Draft	05/19/2011 00:54:59
<input type="checkbox"/>	ASO L 11	0				Draft	05/19/2011 00:56:42
<input type="checkbox"/>	ASO L 12	0				Draft	05/19/2011 01:15:05

3. Select **+**.  
The **Strategy Details Strategy Template** datasheet for the selected analysis appears.

Strategy Details  
Strategy Template

Controlled Strategies (0)

Risks and Actions

Risk Analysis

Revisions

New Strategy Template

Not Assigned

Template Identification

Template Overview

Datasheet ID:  
Asset Strategy Template

Template ID:  
Text input  
This field is required

Risk Matrix  
[Dropdown]

Description  
Text area

Template Notes  
Text area


Criticality  
Text input

Duty  
Text input

Service  
Text input

- As needed, enter data in the [available fields](#).

**Note:** Template ID is a required field.

- When finished, select .  
Your template is saved in the Draft state.

## Copy a Template in ASM

### Before You Begin

Only an Asset Strategy Templates whose state is Active can be selected for use in this procedure.

### Procedure

- Copy a Template in ASM in the **Template** section:
  - Access the [ASM Overview](#) page.
  - Select the **Templates** tab.  
The **Templates** section appears, displaying a list of existing Asset Strategy Templates.

Asset Strategy Management  
Asset: Home

Import + ↻

149 Asset Strategies	43 System Strategies	61 Templates
-------------------------	-------------------------	-----------------

<input type="checkbox"/> (0)	TEMPLATE ID	CONTROLLED STRATEGIES	CRITICALITY	DUTY	SERVICE	STATE	LAST UPDATED DATE
<input type="checkbox"/>	A12	0				Active	09/30/2013 15:07:30
<input type="checkbox"/>	A13	0				Active	09/30/2013 15:18:53
<input type="checkbox"/>	ASI AIR COOLER	0				Active	05/31/2008 02:07:29
<input type="checkbox"/>	ASI Bearing	0				Active	05/31/2008 02:08:15
<input type="checkbox"/>	ASI Power Supply	0				Active	05/31/2008 02:07:55
<input type="checkbox"/>	ASI Pressure Instrument	0				Draft	06/04/2008 22:02:05
<input type="checkbox"/>	ASI Switch	0				Active	05/31/2008 02:05:56
<input type="checkbox"/>	ASI tank	0				Active	06/03/2008 01:47:31
<input type="checkbox"/>	ASO L 10	0				Draft	05/19/2011 00:54:59
<input type="checkbox"/>	ASO L 11	0				Draft	05/19/2011 00:56:42
<input type="checkbox"/>	ASO L 12	0				Draft	05/19/2011 01:15:05

3. Select the row for a template.

**Note:** Do not select the link under the template name.

4. Select .

In a new tab, a template opens with the copied template in the Draft state.

Strategy Details  
Strategy Template

Controlled Strategies (0)

Risks and Actions

Risk Analysis

Revisions

Copy ASI Bearing  
Last modified by Super User, Baseline on 09/26/2019 12:49:23

Draft  
Not Assigned

Template Identification

Template Overview

Risk Profile  Risk Rank  Financial Risk

Active Unmitigated

Risk Rank

10000

1000

100

10

1

0.1

No data to display

Risks


Cost Projection



Active

USD 0

1 2 3 4 5

Years

5. Select the **Template Identification** tab to make your changes, and then select .

- Copy a template in ASM from within a template:
  1. In the template that you want to copy, select . A new window appears, displaying the template that you want to copy.
  2. Modify the template, if necessary. When done, select .

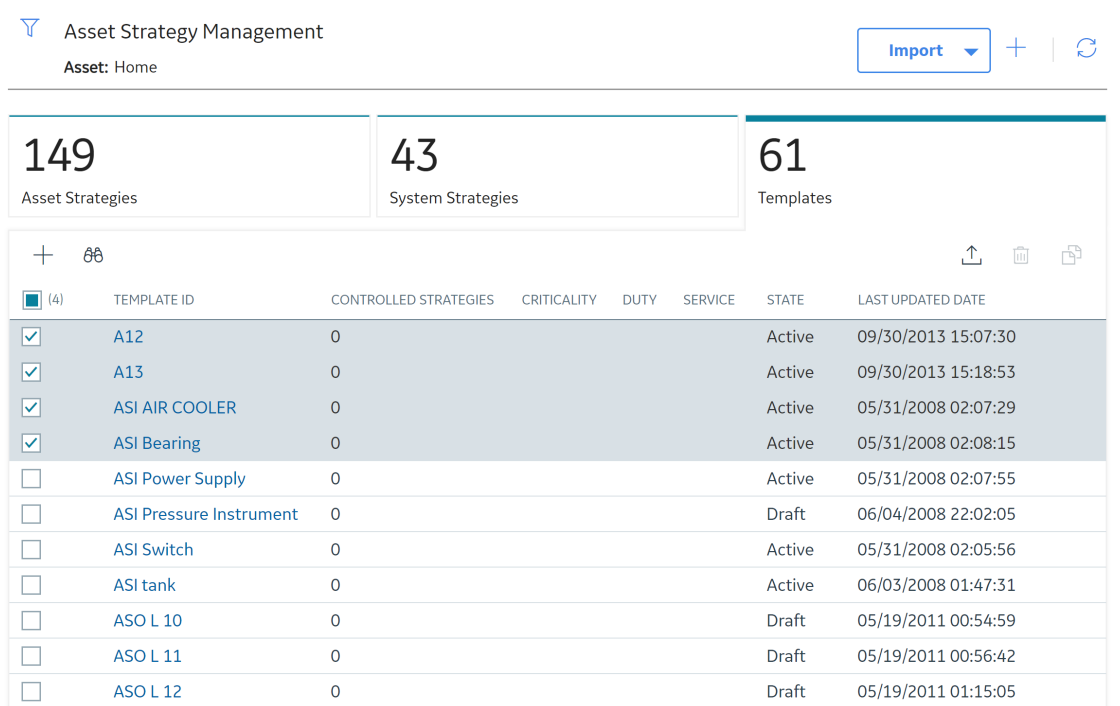
The template is copied.

## Export an Asset Strategy Template

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Templates** tab.
3. Select one or more templates that you want to export.

The selected templates are highlighted.



Asset Strategy Management  
Asset: Home

Import + Refresh

149 Asset Strategies | 43 System Strategies | 61 Templates

<input checked="" type="checkbox"/> (4)	TEMPLATE ID	CONTROLLED STRATEGIES	CRITICALITY	DUTY	SERVICE	STATE	LAST UPDATED DATE
<input checked="" type="checkbox"/>	A12	0				Active	09/30/2013 15:07:30
<input checked="" type="checkbox"/>	A13	0				Active	09/30/2013 15:18:53
<input checked="" type="checkbox"/>	ASI AIR COOLER	0				Active	05/31/2008 02:07:29
<input checked="" type="checkbox"/>	ASI Bearing	0				Active	05/31/2008 02:08:15
<input type="checkbox"/>	ASI Power Supply	0				Active	05/31/2008 02:07:55
<input type="checkbox"/>	ASI Pressure Instrument	0				Draft	06/04/2008 22:02:05
<input type="checkbox"/>	ASI Switch	0				Active	05/31/2008 02:05:56
<input type="checkbox"/>	ASI tank	0				Active	06/03/2008 01:47:31
<input type="checkbox"/>	ASO L 10	0				Draft	05/19/2011 00:54:59
<input type="checkbox"/>	ASO L 11	0				Draft	05/19/2011 00:56:42
<input type="checkbox"/>	ASO L 12	0				Draft	05/19/2011 01:15:05

4. Select . The **Export to a File** window appears.

Export to a File

Please provide a File Name

Cancel Export

5. In the **Please provide a File Name** box, enter a file name for the export.
6. Select **Export**.  
The selected Asset Strategy Templates are exported.

**Note:** All the Secondary Actions associated with the primary actions in the asset strategy template are also exported.

## Apply a Template to an Asset Strategy as a Copy

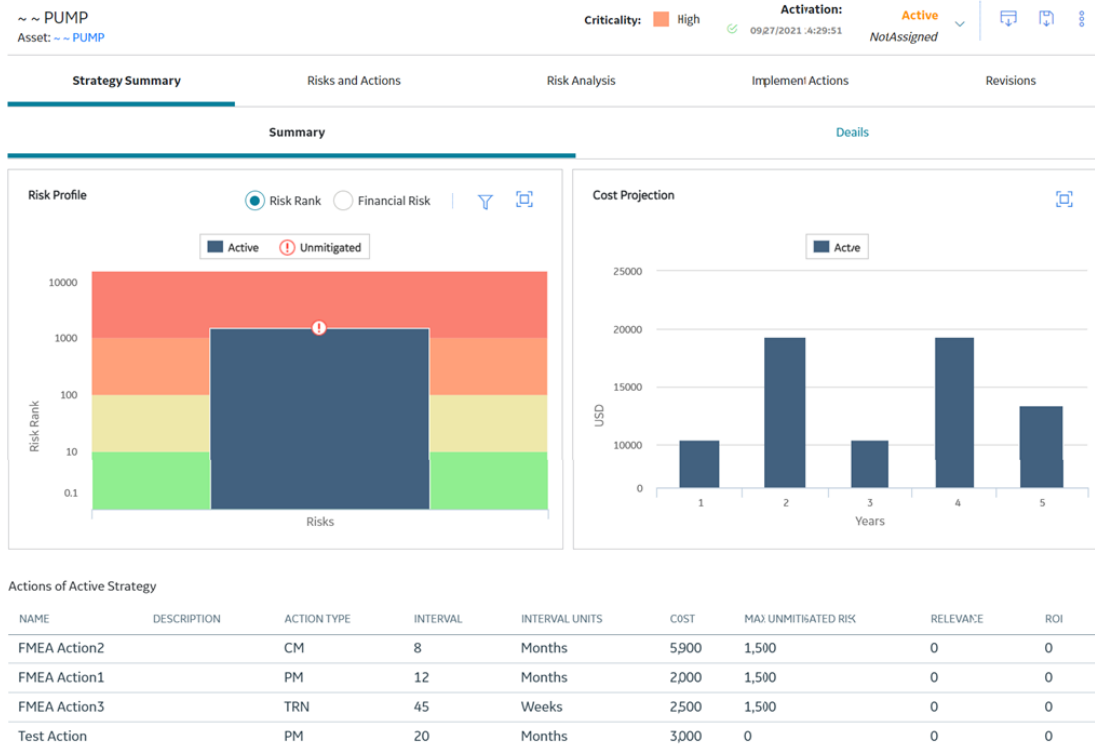
### About This Task


When you apply a template to a strategy as a copy, a copy of the template, with its related records, is applied to the strategy. You can choose to copy both actions and risks, or just risks, to the strategy. Additionally, you can decide whether you want to discard or keep certain items related to the strategy.

Applying a template to a strategy can be done from an Asset Strategy record or from a Strategy Template record.

### Procedure

- Apply a Template as a Copy from the Strategy Record:
  1. Access the [ASM Overview](#) page.
  2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.
  3. Select the strategy in which you want to apply a template as a copy.  
The **Strategy Details** workspace for the selected asset strategy appears.



4. Select .  
The **Apply Template** window appears, displaying a list of existing Active Asset Strategy Templates.



## Apply Template



Select a Template

Application Method

Apply Template



TEMPLATE ID	DESCRIPTION	STATE ID	LAST UPDATED
ASI Bearing		Active	5/30/2008
ASI Power Supply		Active	5/30/2008
ASI Switch		Active	5/30/2008
ASI tank		Active	6/2/2008
ASO Small		Active	5/17/2011
Asset strategy linked to site reference SAP46CDEV-...		Active	5/19/2010
Asset strategy with updated action records for ASI ...		Active	7/2/2008
Centrifugal Pump Template		Active	7/25/2016
Euro Template		Active	1/9/2012
Example Template		Active	12/11/2008

1 - 35 of 35 Results

← Page 1 of 1 →

Next

5. Select the template that you want to use, and then select **Next**. The **Application Method** section appears. The **Apply the Template as a Copy** option is preselected.

## Apply Template



Select a Template

Application Method

Apply Template

Select to apply the template as a copy or as a master:

- Apply the template as a copy
- Apply the template as a master

Select which portions of the template to apply

- Apply both actions and risks
- Apply risks only

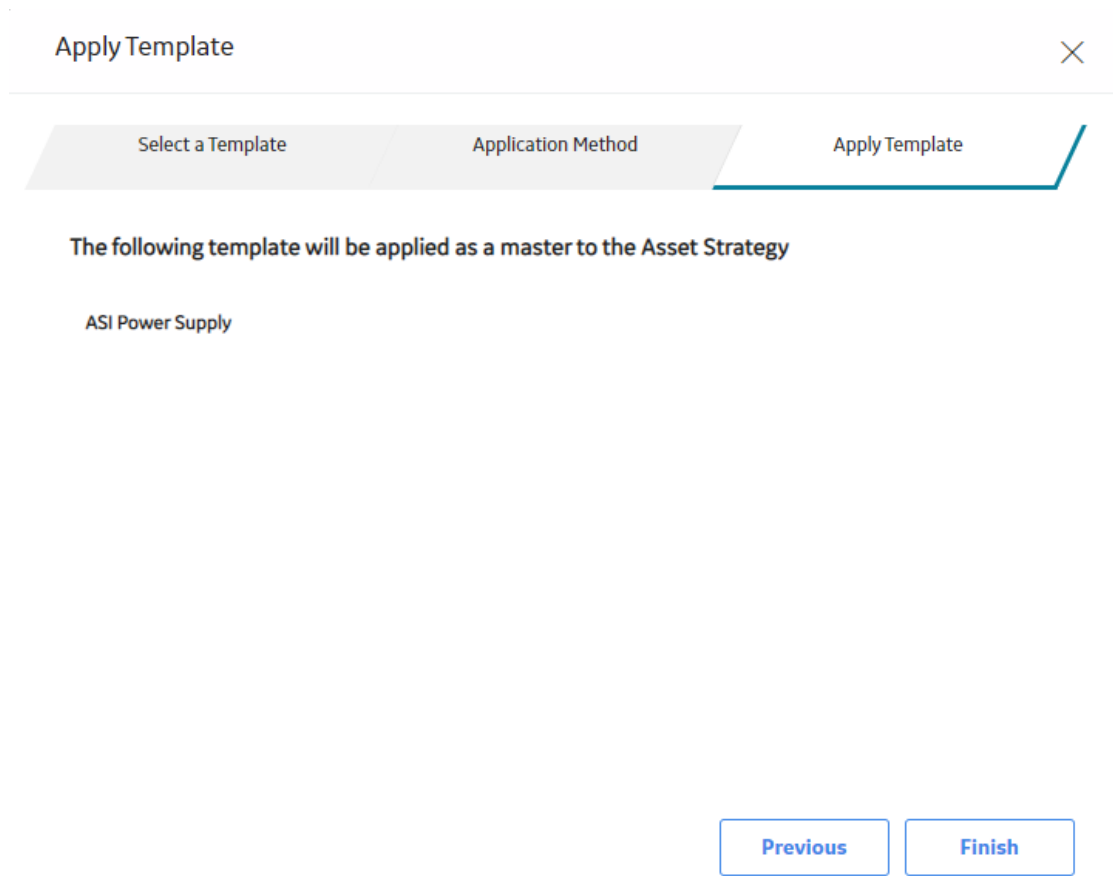
Select how existing items should be handled in existing Asset Strategies

- Mark existing items for deletion
- Append the template items to the existing items

Previous

Next

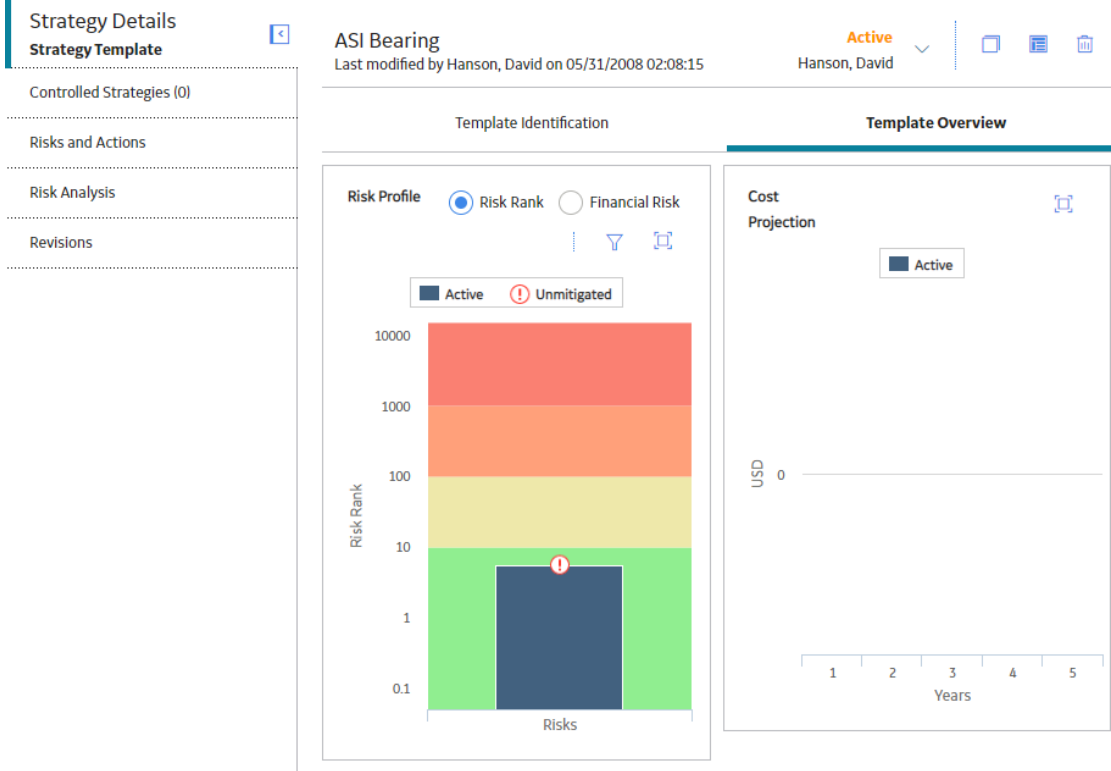
- Tip:** If you would like to apply your template as a master instead, you can [follow these steps](#).
6. Select which portions of the template to apply by selecting the appropriate option:
    - Apply both actions and risks
    - Apply risks only
  7. Select how existing items should be used in existing asset strategies by selecting the appropriate option:
    - Mark existing items for deletion
    - Append the template items to the existing items
  8. Select **Next**.  
The **Apply Template** window displays a message indicating that the template will be applied as a master.




9. Select **Finish**.

**Note:**

- A template can be applied as a copy to strategies from any site as long as the risk matrix matches.
  - Secondary actions defined in the template level also get applied during template application to the strategy.
- Apply a Template as a Copy from the Template Record:
    1. Access the [ASM Overview](#) page.
    2. Select the **Templates** tab.  
The **Templates** section appears, displaying the list of templates.
    3. Select the template that you want to apply to a strategy.  
In a new tab, the **Strategy Details Strategy Template** workspace for the selected template appears, displaying the **Template Overview** section.



4. Select . The **Apply Template** window appears, displaying the **Application Method** tab. The **Apply the Template as a Copy** option is selected by default.

## Apply Template ×

---

Application MethodSearchApply Template

---

Select to apply the template as a copy or as a master:

Apply the template as a copy

Apply the template as a master

Select which portions of the template to apply

Apply both actions and risks

Apply risks only

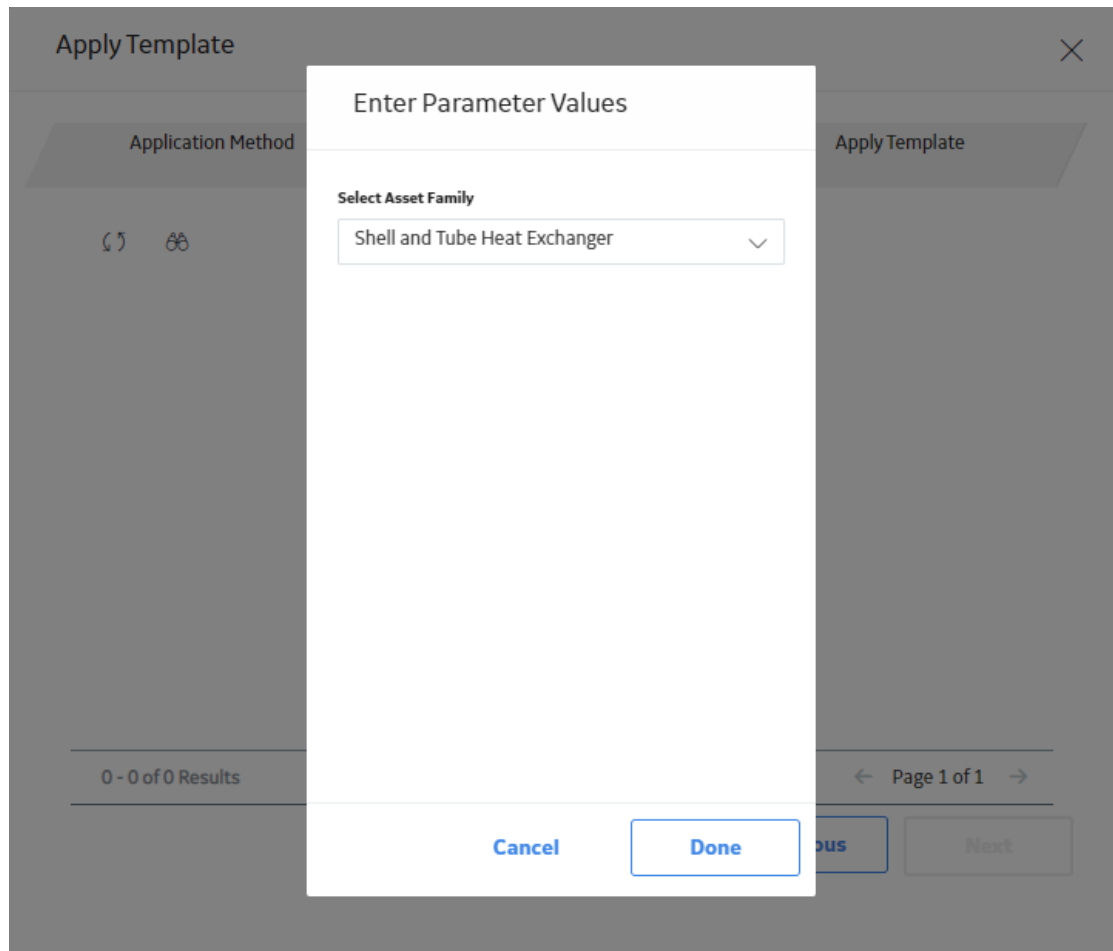
Select how existing items should be handled in existing Asset Strategies

Mark existing items for deletion

Append the template items to the existing items

Next

5. Select which of the following portions of the template you want to apply:
  - Apply both actions and risks
  - Apply risks only
6. Select one of the following option for how you want existing items to be used in existing asset strategies:
  - Mark existing items for deletion
  - Append the template items to the existing items
7. Select **Next**.  
The **Apply Template** window displays the **Search** tab, and the **Enter Parameter Values** window appears.



8. Using the **Select Asset Family** drop-down list, select the family of the asset to which you want to apply a template, and then select **Done**.  
The **Search** tab displays a list of assets in the family that you selected.

## Apply Template



Application Method

Search

Apply Template

<input type="checkbox"/>	ID	ASSET FAMILY	LAST UPDATED DATE
<input type="checkbox"/>	HXST 113 OFF-GAS COOLER	Shell and Tube ...	02/02/2009 07:06:16
<input type="checkbox"/>	HXST 71 REACTOR EFFLUENT CHARGE	Shell and Tube ...	02/02/2009 07:06:47
<input type="checkbox"/>	HXST 101 TREAT GAS SPILLBACK COOLER...	Shell and Tube ...	02/02/2009 07:06:13
<input type="checkbox"/>	PURGE GAS EXCHANGER HE-2952	Shell and Tube ...	10/02/1998 23:59:36
<input type="checkbox"/>	HXST 78 MAIN COLUMN O.H. TRIM COOLER	Shell and Tube ...	02/02/2009 07:06:49
<input type="checkbox"/>	HXST 140 NO.1 STEAM REHEATER	Shell and Tube ...	02/02/2009 07:06:24
<input type="checkbox"/>	HXST 88 NO. 3 SULFUR CONDENSER	Shell and Tube ...	02/02/2009 07:06:52
<input type="checkbox"/>	HXST 77 MAIN COLUMN O.H. TRIM COOLER	Shell and Tube ...	02/02/2009 07:06:48
<input type="checkbox"/>	HXST 59 SLACK WAX HEATER	Shell and Tube ...	02/02/2009 07:06:43
<input type="checkbox"/>	HXST 164 CHARGE MIX COOLER	Shell and Tube ...	02/02/2009 07:06:31

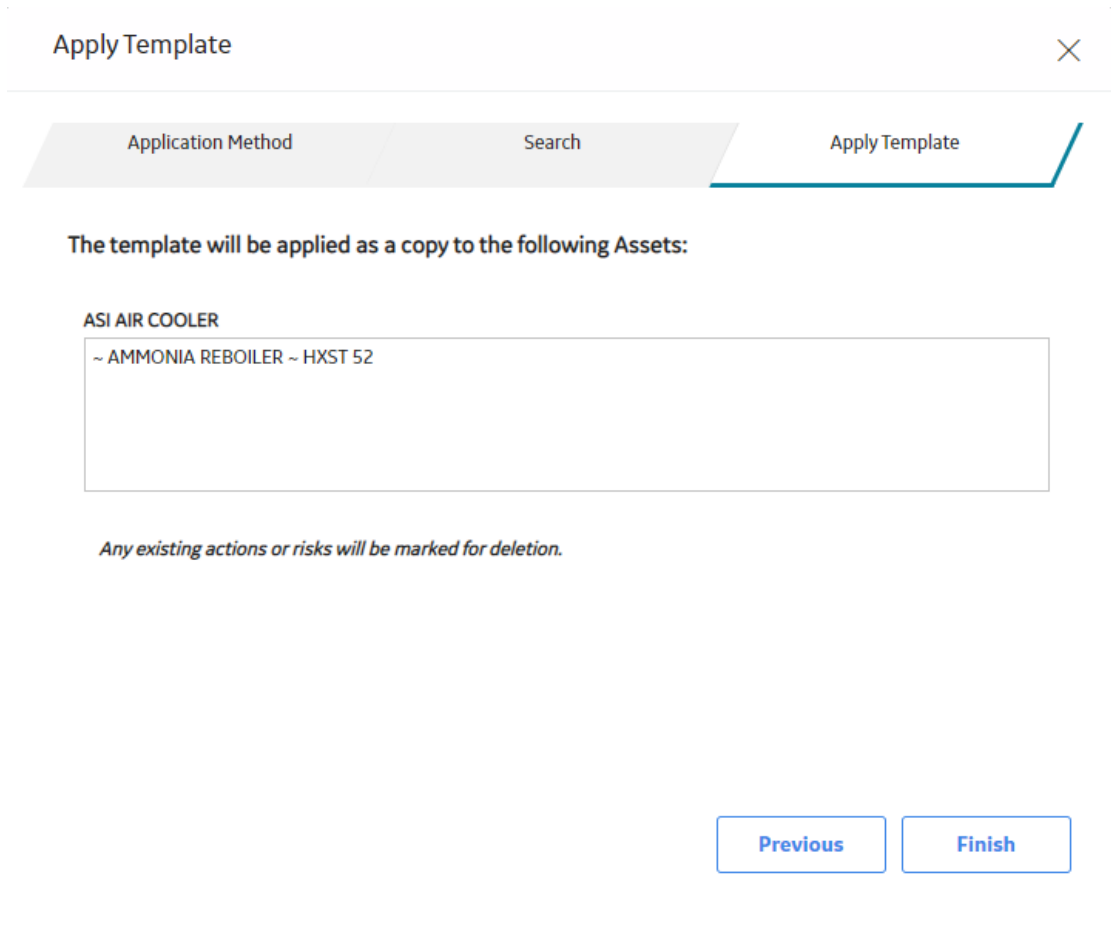
1 - 100 of 234 Results

← Page 1 of 3 →

Previous

Next

9. Select the asset(s) to which you want to apply the template, and then select **Next**. The **Apply Template** window displays a message indicating that the template will be applied as a master to the asset(s) that you selected.



10. Select **Finish**.

**Note:**

- If you apply a template to an asset that has no strategy, applying the template will create an asset strategy for that asset.
- Secondary actions defined in the template level also get applied during template application to the strategy.

## Apply a Template as a Master to an Asset Strategy

### About This Task

When you apply a template as a master to an asset strategy, all of the associated records for that template are applied to the strategy, and moving forward, the strategy is controlled by the template. Any changes then made to the template's risks or actions will also be reflected in the strategies it controls.

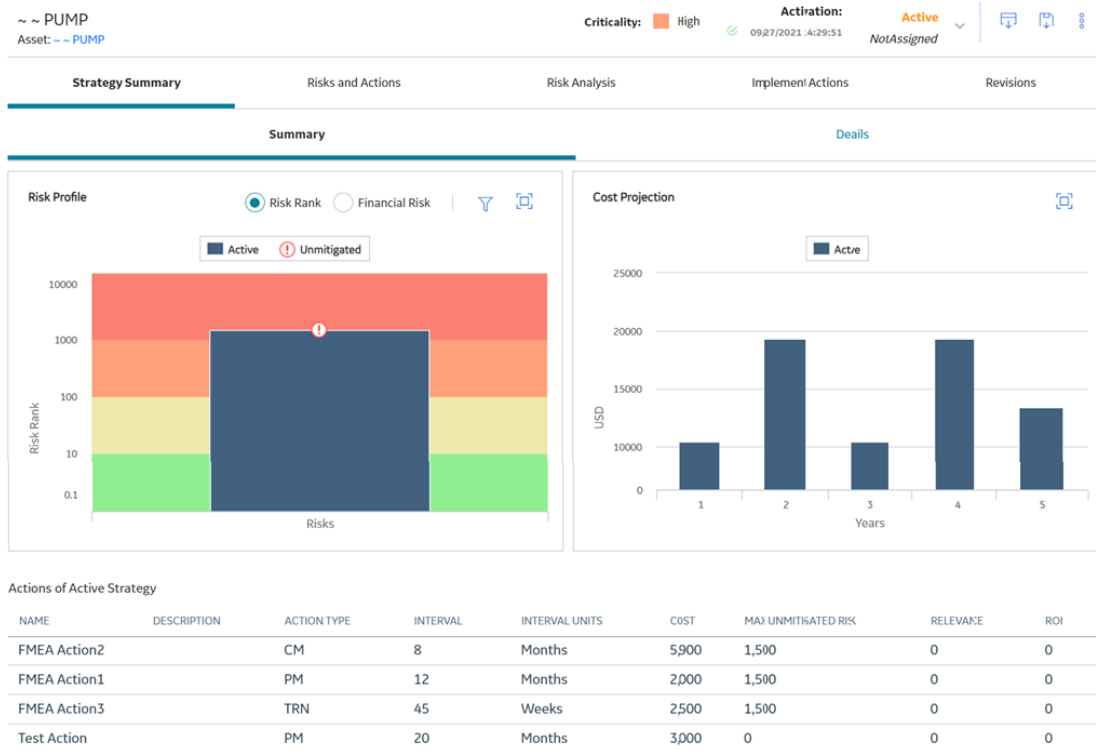
Applying a template to a strategy can be done from an Asset Strategy record or from a Strategy Template record.

**Note:** For optimal performance, the number of controlled strategies for a template is limited to 5000.



## Procedure

- Apply a Template to a Strategy from the Asset Strategy Record
  - Access the [ASM Overview](#) page.
  - Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.
  - Select the strategy to which a template is to be applied as master.  
The **Strategy Details** workspace for the selected asset strategy appears.



- In the upper-right corner, select .  
The **Apply Template** window appears.

**Note:** Only templates in the Active state appear in the list.

## Apply Template



Select a Template

Application Method

Apply Template



TEMPLATE ID	DESCRIPTION	STATE ID	LAST UPDATED
ASI Bearing		Active	5/30/2008
ASI Power Supply		Active	5/30/2008
ASI Switch		Active	5/30/2008
ASI tank		Active	6/2/2008
ASO Small		Active	5/17/2011
Asset strategy linked to site reference SAP46CDEV-...		Active	5/19/2010
Asset strategy with updated action records for ASI ...		Active	7/2/2008
Centrifugal Pump Template		Active	7/25/2016
Euro Template		Active	1/9/2012
Example Template		Active	12/11/2008

1 - 35 of 35 Results

← Page 1 of 1 →

Next

5. Select the **Template ID** of the template that you want to use and then select **Next**. The **Application Method** tab is displayed.

## Apply Template ×

---

Select a TemplateApplication MethodApply Template

Select to apply the template as a copy or as a master:

Apply the template as a copy

Apply the template as a master

Select which portions of the template to apply

Apply both actions and risks

Apply risks only

Select how existing items should be handled in existing Asset Strategies

Mark existing items for deletion

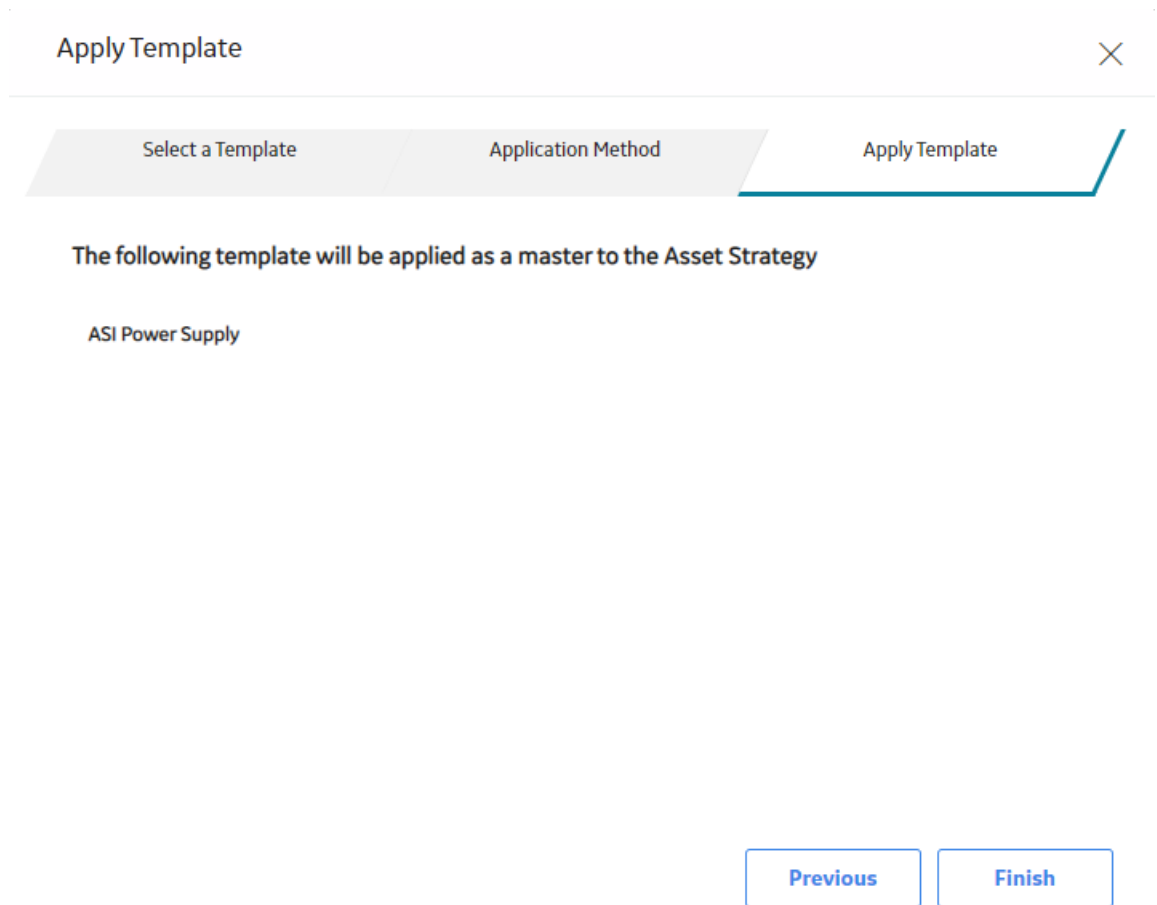
Append the template items to the existing items

PreviousNext

6. Select **Apply the Template as a Master** option and then select **Next**.

**Tip:** If you would like to apply your template as a copy instead, you can [follow these steps](#).

7. The **Apply Template** window displays a message indicating that the template will be applied as a master.



8. Select **Finish**.

**Note:**

- Templates can control strategies from multiple sites belonging to same risk matrix as a master, but if the user does not have permission on all sites, then strategy approval operations will be unavailable.
- Secondary actions defined in the template level also get applied during template application to the strategy.
- Apply a Template to a Strategy from the Asset Strategy Record
  1. Access the [ASM Overview](#) page.
  2. Select the **Templates** tab.  
The **Templates** section displays the list of templates.
  3. Select the template that you want to apply to a strategy.  
In a new tab, the **Strategy Details Strategy Template** workspace for the selected template appears, displaying the **Template Overview** section.

Strategy Details  
**Strategy Template**

- Controlled Strategies (0)
- Risks and Actions
- Risk Analysis
- Revisions

ASI Bearing  
 Last modified by Hanson, David on 05/31/2008 02:08:15

Active  
 Hanson, David

Template Identification

Risk Profile  Risk Rank  Financial Risk

Active Unmitigated

Risks

Template Overview

Cost Projection

Active

- Select . The **Apply Template** window appears, displaying the **Application Method** tab.

## Apply Template ✕

---

Application Method Search Apply Template

Select to apply the template as a copy or as a master:

Apply the template as a copy

Apply the template as a master

Select which portions of the template to apply

Apply both actions and risks

Apply risks only

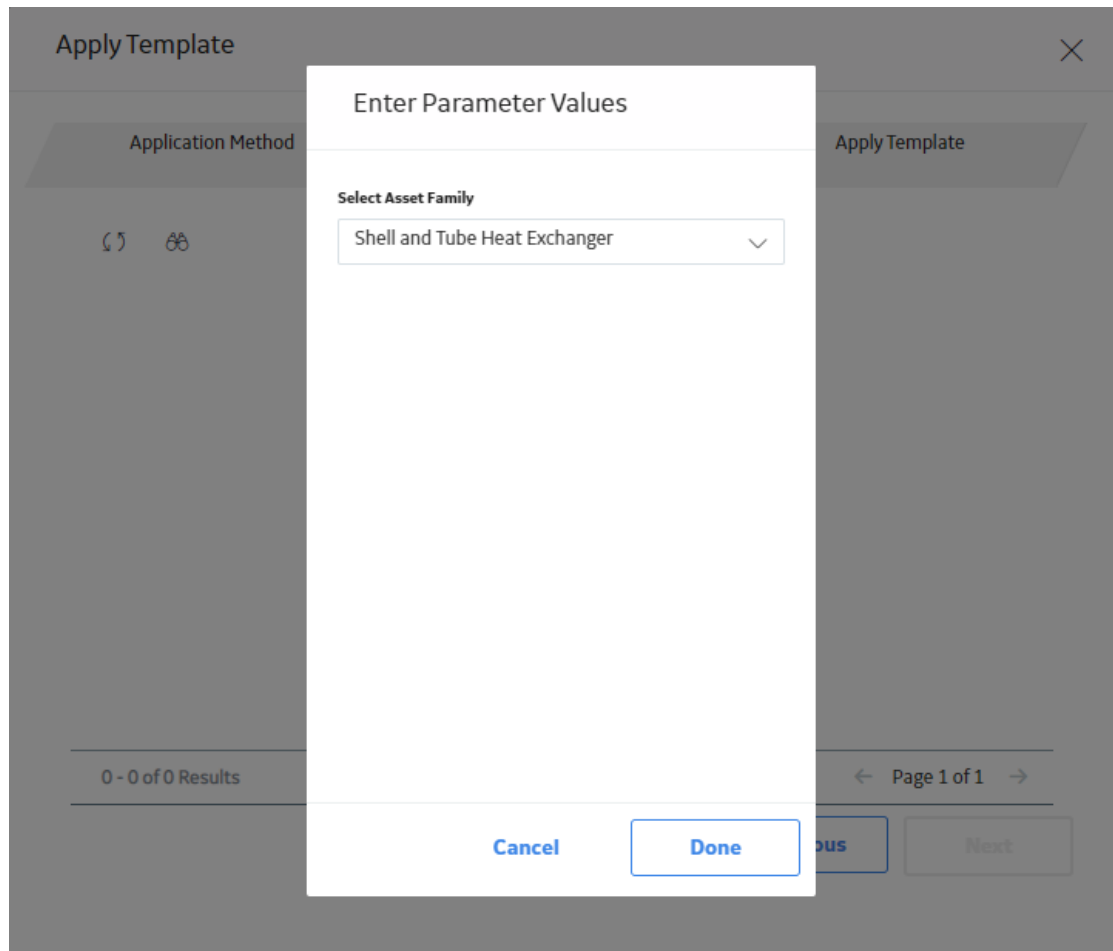
Select how existing items should be handled in existing Asset Strategies

Mark existing items for deletion

Append the template items to the existing items

[Next](#)

5. Select **Apply the Template as a Master** option and then select **Next**. The **Apply Template** window displays the **Search** tab, and the **Enter Parameter Values** window appears.



6. Using the **Select Asset Family** drop-down list, select the family of the asset to which you want to apply a template, and then select **Done**.  
The **Search** tab displays a list of assets in the family that you selected.

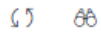
## Apply Template



Application Method

Search

Apply Template



<input type="checkbox"/>	ID	ASSET FAMILY	LAST UPDATED DATE
<input type="checkbox"/>	HXST 113 OFF-GAS COOLER	Shell and Tube ...	02/02/2009 07:06:16
<input type="checkbox"/>	HXST 71 REACTOR EFFLUENT CHARGE	Shell and Tube ...	02/02/2009 07:06:47
<input type="checkbox"/>	HXST 101 TREAT GAS SPILLBACK COOLER...	Shell and Tube ...	02/02/2009 07:06:13
<input type="checkbox"/>	PURGE GAS EXCHANGER HE-2952	Shell and Tube ...	10/02/1998 23:59:36
<input type="checkbox"/>	HXST 78 MAIN COLUMN O.H. TRIM COOLER	Shell and Tube ...	02/02/2009 07:06:49
<input type="checkbox"/>	HXST 140 NO.1 STEAM REHEATER	Shell and Tube ...	02/02/2009 07:06:24
<input type="checkbox"/>	HXST 88 NO. 3 SULFUR CONDENSER	Shell and Tube ...	02/02/2009 07:06:52
<input type="checkbox"/>	HXST 77 MAIN COLUMN O.H. TRIM COOLER	Shell and Tube ...	02/02/2009 07:06:48
<input type="checkbox"/>	HXST 59 SLACK WAX HEATER	Shell and Tube ...	02/02/2009 07:06:43
<input type="checkbox"/>	HXST 164 CHARGE MIX COOLER	Shell and Tube ...	02/02/2009 07:06:31

1 - 100 of 234 Results

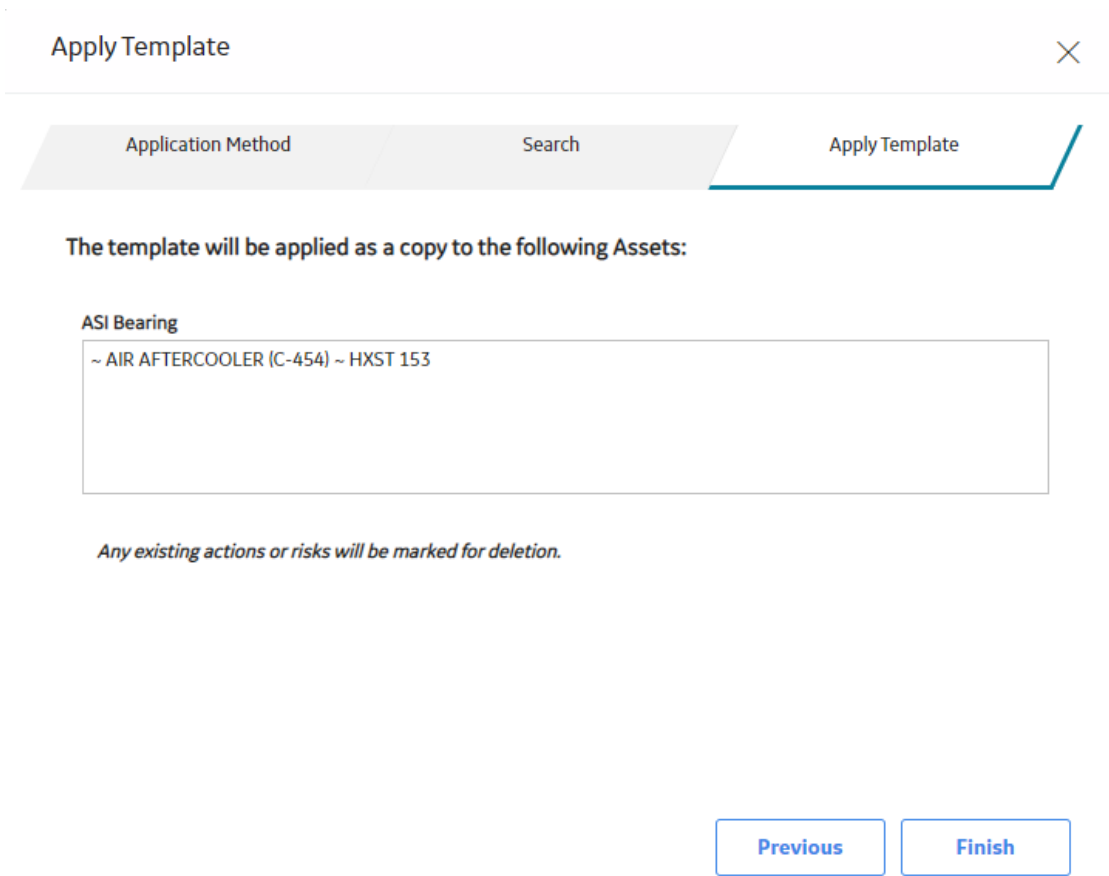
← Page 1 of 3 →

Previous

Next

7. Select the asset(s) to which you want to apply the template, and then select **Next**. The **Apply Template** window displays a message indicating that the template will be applied as a master to the asset(s) that you selected.





8. Select **Finish**.

**Note:**

- If you apply a template to an asset that has no strategy, applying the template will create an asset strategy for that asset.
- Secondary actions defined in the template level also get applied during template application to the strategy.

## Access the Controlled Strategy View for Asset Strategy Templates

### About This Task

When you apply a template as a master to an asset strategy, all of the associated records for that template are applied to the strategy, and moving forward, the strategy is controlled by the template. Any changes then made to the template's risks or actions will also be reflected in the strategies it controls.

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Templates** tab.

The **Templates** section appears, displaying a list of available templates.

Asset Strategy Management Import + | ↻

Asset: Home

**149**

Asset Strategies

**43**

System Strategies

**61**

Templates

<input type="checkbox"/> (0)	TEMPLATE ID	CONTROLLED STRATEGIES	CRITICALITY	DUTY	SERVICE	STATE	LAST UPDATED DATE
<input type="checkbox"/>	A12	0				Active	09/30/2013 15:07:30
<input type="checkbox"/>	A13	0				Active	09/30/2013 15:18:53
<input type="checkbox"/>	ASI AIR COOLER	0				Active	05/31/2008 02:07:29
<input type="checkbox"/>	ASI Bearing	0				Active	05/31/2008 02:08:15
<input type="checkbox"/>	ASI Power Supply	0				Active	05/31/2008 02:07:55
<input type="checkbox"/>	ASI Pressure Instrument	0				Draft	06/04/2008 22:02:05
<input type="checkbox"/>	ASI Switch	0				Active	05/31/2008 02:05:56
<input type="checkbox"/>	ASI tank	0				Active	06/03/2008 01:47:31
<input type="checkbox"/>	ASO L 10	0				Draft	05/19/2011 00:54:59
<input type="checkbox"/>	ASO L 11	0				Draft	05/19/2011 00:56:42
<input type="checkbox"/>	ASO L 12	0				Draft	05/19/2011 01:15:05

- Select the template from which you want to access the **Controlled Strategies** view. The **Strategy Details Strategy Template** workspace appears.

Strategy Details

**Strategy Template**

Controlled Strategies (0)

Risks and Actions

Risk Analysis

Revisions

**ASI Bearing**

Last modified by Hanson, David on 05/31/2008 02:08:15

Active  
Hanson, David

Template Identification

Risk Profile  Risk Rank  Financial Risk

Active ! Unmitigated

Template Overview

Cost Projection

Active

- Select the **Controlled Strategies** tab in the **Strategy Details Strategy Template** pane.

The associated strategies appear. In this workspace, you can then add existing strategies or remove strategies.

The screenshot shows a software interface for managing strategies. On the left is a sidebar with a menu containing 'Strategy Details', 'Strategy Template', 'Controlled Strategies (4)', 'Risks and Actions', 'Risk Analysis', and 'Revisions'. The main area displays the title 'ASSET SAFETY-MB-FLOC-03 ~ MB-FLOC-03 ASS...' and 'Active' status. Below this is a table of controlled strategies:

<input type="checkbox"/>	STRATEGY	DESCRIPTION	ASSET NAME
<input type="checkbox"/>	Master Strategy1		HX-1885 MEA REGENERAT
<input type="checkbox"/>	Master Strategy2		PMP-4086 Kerosine TK 2
<input type="checkbox"/>	Master Strategy3		HX-2291 HCL STRIPPER O'
<input type="checkbox"/>	PMP-7857 AMINE SOUR WATER PUMP - SPARE		PMP-7857 AMINE SOUR W

### Next Steps

- [Create a Strategy Template](#)
- [Remove Strategies in Templates](#)

## Add an Existing Strategy to a Template

### Before You Begin

This topic assumes that there are pre-existing asset strategies that you want to add to your template.

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Templates** tab.  
The **Templates** section opens.
3. Select the template where you want to add an existing strategy.  
In a new tab, the **Strategy Details Strategy Template** workspace for the selected analysis appears, displaying the **Template Overview** section.

Strategy Details  
**Strategy Template**

- Controlled Strategies (0)
- Risks and Actions
- Risk Analysis
- Revisions

ASI Bearing  
 Last modified by Hanson, David on 05/31/2008 02:08:15

Active  
 Hanson, David

Template Identification

Risk Profile  Risk Rank  Financial Risk

Active Unmitigated

Cost Projection

Active

USD

Years

- Select the **Controlled Strategies** tab.  
 The **Controlled Strategies** workspace appears.

Strategy Details  
**Strategy Template**

- Controlled Strategies (4)**
- Risks and Actions
- Risk Analysis
- Revisions

ASSET SAFETY-MB-FLOC-03 ~ MB-FLOC-03 ASS...  
 Last modified by Super User, Baseline on 09/25/2019 16:31:30

Active  
 ASM, Analyst

<input type="checkbox"/>	STRATEGY	DESCRIPTION	ASSET NAME
<input type="checkbox"/>	Master Strategy1		HX-1885 MEA REGENERAT
<input type="checkbox"/>	Master Strategy2		PMP-4086 Kerosine TK 2
<input type="checkbox"/>	Master Strategy3		HX-2291 HCL STRIPPER O'
<input type="checkbox"/>	PMP-7857 AMINE SOUR WATER PUMP - SPARE		PMP-7857 AMINE SOUR W

- To add an existing strategy, select **+**.  
 The **Enter Parameter Values** window for the selected asset type appears.

## Enter Parameter Values

**Asset Type**

All ▼

Cancel Done

- Select the appropriate type from the **Asset Type** drop-down menu, and then select **Done**. The **Select Asset Strategies to Add to Master Template** window appears.

Select Asset Strategies to Add to Master Template

Select Asset Strategies

1 - 28 of 28 record(s)

<input type="checkbox"/>	ID	Description	Strategy Owner	Asset Name	Asset Type	State
<input type="checkbox"/>	asset strategy with r...	asset strategy with r...	zuma, zuma	~ Long pump compre...	Equipment	Active
<input type="checkbox"/>	~ #1 DEPROP. O.H. C...	This strategy was au...	acaadmin	~ #1 DEPROP. O.H. C...	Equipment	Draft
<input type="checkbox"/>	~ #1 STEAM REHEAT...	This strategy was au...	acaadmin	~ #1 STEAM REHEAT...	Equipment	Draft
<input type="checkbox"/>	~ #4 SULFUR CONDE...	This strategy was au...	acaadmin	~ #4 SULFUR CONDE...	Equipment	Draft
<input type="checkbox"/>	TURBINE-M0000000...	This strategy was au...	acaadmin	TURBINE-M0000000...	Equipment	Draft
<input type="checkbox"/>	~ ~ PUMP	This strategy was au...	acaadmin	~ ~ PUMP	Equipment	Active
<input type="checkbox"/>	~ NO.1 STEAM REHE...	This strategy was au...	Iyappan, Sumathi	~ NO.1 STEAM REHE...	Equipment	Draft
<input type="checkbox"/>	~ UPPER OIL COOLE...	This strategy was au...	Iyappan, Sumathi	~ UPPER OIL COOLE...	Equipment	Draft

Cancel OK

- Select the asset strategies that you want to apply to the master template by selecting the check box in the row of the strategies that you want to include, and then select **OK**. A progress bar appears, letting you know the status of the template application. When finished, the **Controlled Strategies** workspace reappears, displaying a message notifying you that your strategies have been added to the template.

Select Asset Strategies to Add to Master Template

50%

A horizontal progress bar with a green segment on the left representing 50% completion and a grey segment on the right representing the remaining 50%.

Applying template to ' - #1 STEAM REHEATER ~ HXST 36

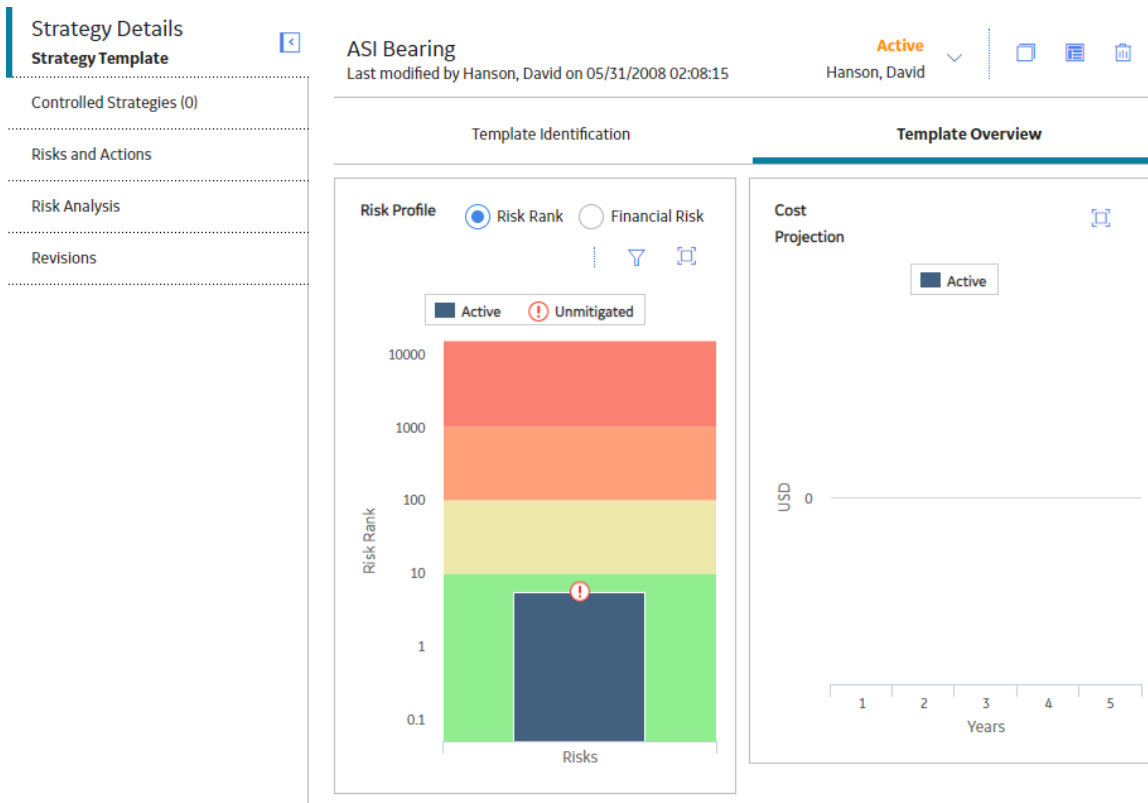
## Unlink Strategies in Templates

### Before You Begin

This topic assumes that you have strategies already linked to a template that you would like to unlink.


### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Templates** tab.  
The **Templates** section appears.
3. Select the template from which you want to unlink a strategy.  
The **Strategy Details Strategy Template** workspace for the selected analysis appears, displaying the **Template Overview** section.



4. Select the **Controlled Strategies** tab.  
The **Controlled Strategies** workspace appears.

<input type="checkbox"/>	STRATEGY	DESCRIPTION	ASSET NAME
<input type="checkbox"/>	Master Strategy1		HX-1885 MEA REGENERAT
<input type="checkbox"/>	Master Strategy2		PMP-4086 Kerosine TK 2
<input type="checkbox"/>	Master Strategy3		HX-2291 HCL STRIPPER O'
<input type="checkbox"/>	PMP-7857 AMINE SOUR WATER PUMP - SPARE		PMP-7857 AMINE SOUR W

5. Select the check boxes to the left of the **Strategy** column of each strategy that you want to unlink.  
The strategy/strategies are highlighted.
6. Select .
- A window appears, asking you to confirm that you want to remove the strategy/strategies.
7. Select **Yes**.  
The selected strategies are removed.

# Chapter 6

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## Risks Analysis



### Topics:

- [About the Risk Analysis Section](#)
- [Access Risk Analysis](#)
- [Apply Risk Analysis Results](#)



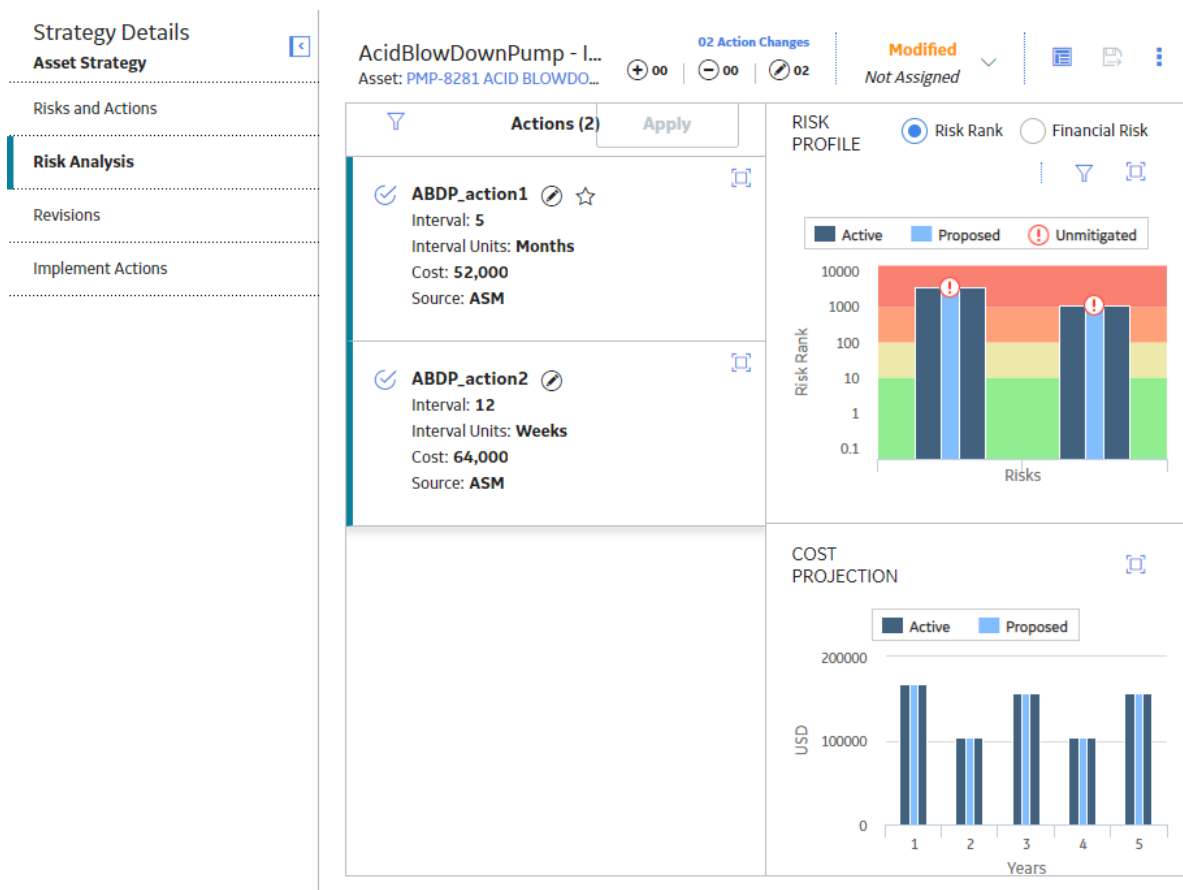
# About the Risk Analysis Section

## Expand Action Cards

The cards in the **Risk Analysis** workspace can be expanded to display more details by selecting , and then collapsed by selecting . When you expand an action card, the datasheet for the action is displayed in the edit mode.

## Toggle Actions On and Off in Risk Analysis

Within the **Actions** list on the left side of the **Risk Analysis** workspace, you can toggle the action cards on and off to include in or exclude from the risk analysis charts on the right. When an action card is selected, it is highlighted in blue in the list of actions on the left, and that action is included in the charts on the right. When an action card is deselected, that action is excluded from the charts on the right.




The screenshot displays the Risk Analysis workspace for an asset named "AcidBlowDownPump - I...". The left sidebar shows a navigation menu with "Risk Analysis" selected. The main area contains an "Actions (2)" list with two items:

- ABDP\_action1**: Interval: 5, Interval Units: Months, Cost: 52,000, Source: ASM. This card is highlighted in blue.
- ABDP\_action2**: Interval: 12, Interval Units: Weeks, Cost: 64,000, Source: ASM.





On the right, there are two charts:

- RISK PROFILE**: A stacked bar chart showing Risk Rank (log scale, 0.1 to 10000) for Active (dark blue), Proposed (light blue), and Unmitigated (red) risks. The x-axis is labeled "Risks".
- COST PROJECTION**: A bar chart showing USD (0 to 200000) over 5 years for Active (dark blue) and Proposed (light blue) actions.

## Sort Action Cards

Actions can be sorted to display the items you are most interested in viewing from a large list using .

In the **Sort List By** box, you have the following options:

- **Sort by Field:** Select the individual drop-down list boxes in the control to select the fields by which you want to sort.
- **Note:** Consult the ASM Admin section.
- **Sort in Ascending or Descending Order:** Select  to toggle between ascending and descending order for each sort condition.
- **Add Multiple Conditions to Sort by:** Select  **Add Sort Condition** to add a sort condition.
- **Delete a Sort Condition:** Select  beside a sort condition to delete it.
- **Rearrange Order of Sort Conditions:** Select  to drag-and-drop sort conditions into different positions in the sort hierarchy.

As you make selections in the **Sort List By** box, the grid sorts accordingly.

## Access Risk Analysis

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.

3. Select the strategy for which you want to access the risk analysis.  
The **Strategy Details** workspace for the selected asset strategy appears.
4. Select the **Risk Analysis** tab.  
The **Risk Analysis** workspace appears.

The screenshot shows the Risk Analysis workspace for asset PMP-4543. The sidebar on the left contains navigation options: Strategy Details, Asset Strategy, Risks and Actions, Risk Analysis (selected), Revisions, and Implement Actions. The main content area is divided into two sections. The top section, titled 'Actions (7)', lists four actions:

- Change Lubricant**: Interval: 6, Interval Units: Months, Cost: 300, Source: ASM
- Check Lubrication**: Interval: 1, Interval Units: Weeks, Cost: 10, Source: EAM
- Lube Oil Analysis**: Interval: 1, Interval Units: Years, Cost: 100, Source: ASM
- Operational Check**: Interval: 1, Interval Units: Weeks, Cost: (blank), Source: EAM

The right section contains two charts. The top chart, 'RISK PROFILE', shows Risk Rank on a logarithmic scale from 0.1 to 10000. It features a legend for Active (dark blue), Proposed (light blue), and Unmitigated (red). The chart area is currently empty with the text 'No data to display'. The bottom chart, 'COST PROJECTION', shows USD on the y-axis (0 to 15000) over 5 years. It features a legend for Active (dark blue) and Proposed (light blue). The chart shows bars for each year, with the highest values in year 2.

## Apply Risk Analysis Results

### Procedure

The following steps describe how you can apply the actions that you want to apply to the asset in light of your risk analysis results.

1. [Access Risk Analysis](#).  
The actions are displayed on the left side and the risk analysis charts are displayed on the right side.
2. [Toggle the action cards on or off](#), depending on your preferences for applying risk analysis results, and then select **Apply**.  
A message appears, asking you to confirm that you want to complete the Apply action.

---

## Removing Unselected Actions

---

This operation will mark all actions that haven't been selected as deleted. If you have created new actions or made any modifications to existing actions, your changes may be lost during this operation. Do you want to continue?

Yes

No

When you apply the results of the risk analysis:

- Any selected actions that were previously in the deleted state become unmodified.
- Any unselected actions that were new are removed entirely.
- Any unselected actions that were existing in a modified or active state are flagged as removed and remain on the list.

**Note:** If the state of the strategy is Pending Review, you will be able to toggle the selections, but the **Apply** button will remain disabled.

**Note:** Mandatory actions, consolidated actions, and actions sourced from RBI or SIS cannot be applied.

# Chapter 7

---

## Revisions

### Topics:

- [About Revisions](#)
- [Access Revisions](#)
- [Access Revision Changes](#)
- [Restore Revision Changes](#)

## About Revisions

The **Revisions** section of an asset strategy contains the records and timestamps for when the strategy was activated, as well as details on any revisions that have been made to the strategy.

### Basis for Revision

If a strategy is in Pending Review state, you will be able to see the basis for revision in the **Basis For Last Revision** column on the **Revisions** page. If the strategy is in **Modified** state, you will be able to see the **Basis for rework** in the same location. Select the link to view the entire basis for revision or basis for rework text.

The screenshot shows the 'Revisions' section of a strategy page. On the left is a navigation menu with 'Revisions' selected. The main content area shows 'V4.0 Asset Strategy' with an asset of '~ Electric pump 001 ~ P-1000-DF01'. The status is 'Active' (orange) and 'Not Assigned'. A table lists revision records. The first record has a 'STRATEGY ACTIVATION DATE' of '09/04/2014 15:07:41' and a 'STRATEGY ACTIVATED BY' of 'Sumathi Iyappan'. The 'BASIS FOR LAST REVISION' column is highlighted with a red box, indicating it is the focus of the document.

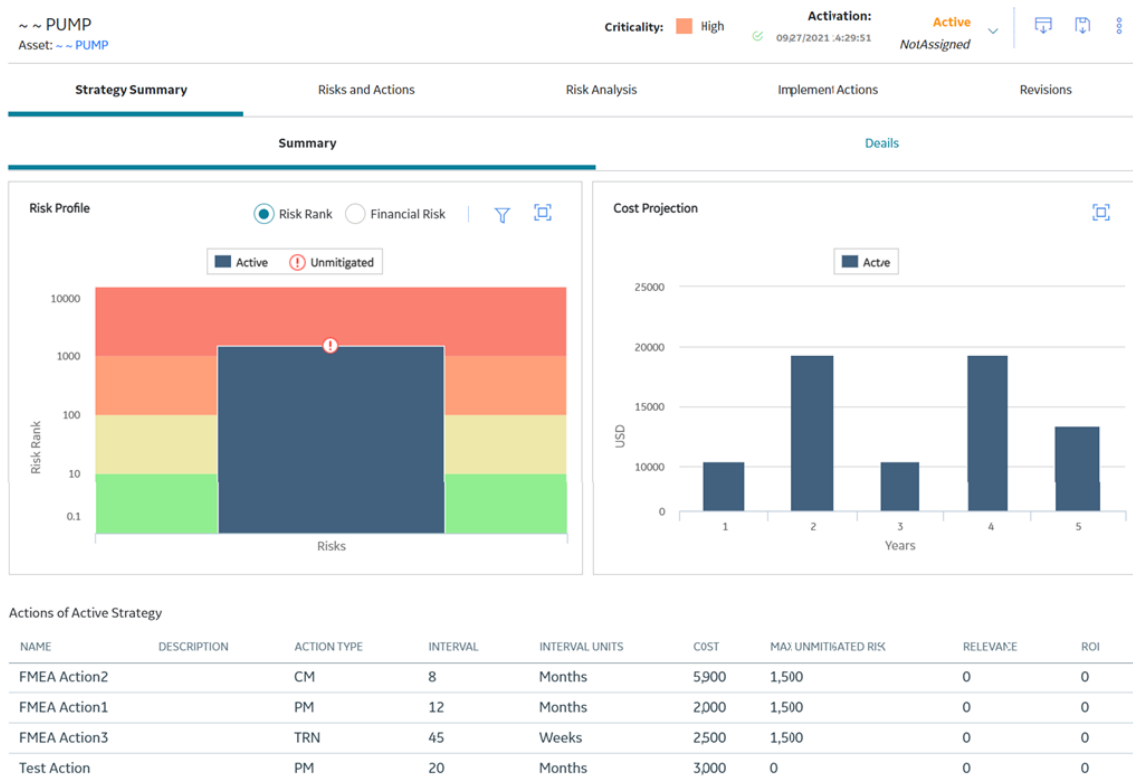
After a strategy is moved to **Active** state, if there have been revisions, the basis for revision is archived in the **Revisions** section of the strategy, in the **Identification** section of the revision record.

The screenshot shows the 'Identification' section of a revision record. The top navigation shows 'Revisions' selected. The main content area shows 'Revision: 05/18/2016 09:40:44'. The status is 'Modified' (orange) and 'Not Assigned'. The 'Identification' section is highlighted with a blue bar. It contains a 'Datasheet ID' dropdown menu set to 'Strategy Revision'. Below this are several text input fields: 'Strategy ID' (value: '~ ~ PUMP'), 'Description' (value: 'This strategy was automatically generated by Asset Criticality Analysis.'), 'Revision Number' (value: 0), 'Plan Length' (value: 5), 'Strategy Activated By' (value: sumathi), 'Strategy Activation Date' (value: 05/18/2016 09:40:44), 'Strategy Proposed By' (value: Text input), and 'Strategy Proposed Date' (value: Text input). The 'Basis For Last Revision' section is highlighted with a red box, indicating it is the focus of the document.

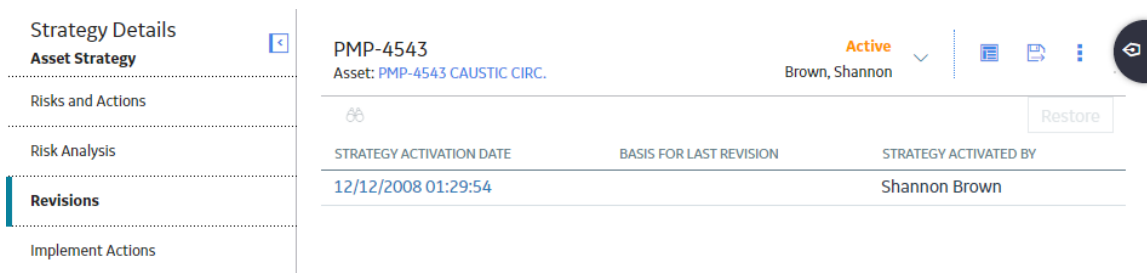
# Access Revisions

## Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.
3. Select the strategy whose revisions you want to access.  
The **Strategy Details** workspace for the selected asset strategy appears.



4. Select the **Revisions** tab.  
The **Revisions** page appears, displaying a grid containing the revisions that have been made to date.



**Note:** Revision history is only available for asset strategies, and not for system strategies.

# Access Revision Changes

## Procedure

1. [Access Revisions.](#)
2. Select the revision whose changes you want to access.  
A workspace for the strategy's revisions appears, displaying the **Actions Revision** section.

Strategy Details  
Asset Strategy

PMP-4543  
Asset: PMP-4543 CAUSTIC CIRC.

Active  
Brown, Shannon

Revision: 12/12/2008 01:29:54

Identification		Actions Revision	Risks Revision
ACTION NAME	ID	DESCRIPTION	
Operational Check	PMP-4543-A04	Verify proper operation. Qualitative observation of condition and	
Check Lubrication	PMP-4543-A02	Perform check of lubricant, add or change oil when needed	
Vibration Analysis	PMP-4543-A07	Perform full spectrum vibration monitoring. Establish baseline at	
Change Lubricant	PMP-4543-A01	Perform changeout of lubricant	
Overhaul	PMP-4543-A05	Perform overhaul of components	
Lube Oil Analysis	PMP-4543-A03	Perform lube oil analysis. Establish action levels. Trend results. S	
Performance Test	PMP-4543-A06	Perform component performance test over full range of operatio	

3. Select the action whose revision changes you want to access.  
-or-  
To display the risk revisions for that strategy, select the **Risks Revision** tab, and then select the risk whose revision changes you want to access.  
A workspace appears, displaying either risks or actions revisions, depending on which tab you selected.  
**Note:** The **Show Changes** button is only enabled for actions or risks that have been edited.
4. Select **Show Changes**.  
The **Changes for Selected Action** window appears, displaying the changes made on the action for that revision package.

# Restore Revision Changes

## Procedure

1. [Access Revisions.](#)
2. In the grid, select the line containing the revision whose changes you want to restore, and then select **Restore**.  
The **Restore Revision** window appears.

**Note:** The **Restore** button is disabled in the following cases:



- When you have sourced the Actions or Risks from RBI.
- When you have selected the **Mandatory** check box for the Actions.

## Restore Revision



Do you want to keep existing actions and risks?

No, Remove

Yes, Keep

3. Select **Yes, Keep** to restore the revision and keep the existing actions and risks.

-or-

Select **No, Remove** to restore the revision and remove the actions and risks.

The strategy revision is restored, and, depending on your selection, the associated actions and risks are either retained or removed.

# Chapter 8

---

## Implement Actions

### Topics:

- [About Implement Actions](#)
- [Access the Implement Actions Workspace](#)
- [About Calibration Tasks](#)
- [Link Existing Health Indicators](#)
- [About Inspection Tasks](#)
- [About Proof Test Tasks](#)
- [Create New Measurement Location or Lubrication Requirement Records](#)
- [Link a Policy Instance](#)
- [Apply Updates to Implemented Actions](#)
- [Unlink Implementations](#)
- [Link Existing Tasks to Actions](#)
- [Send Approved Actions to an ASI Package](#)
- [View Execution History for Actions](#)

## About Implement Actions

In an asset strategy, actions define the work needed to mitigate the risks identified for an asset. That work is executed by implementing the actions, and the method by which you do this depends on the particular action and the APM module that is most suitable to use to execute the action.

Consider the following examples:

- If you have an action called Check Lubricant, you may want to implement it by creating a new Lubrication Requirement, which would then be managed in Rounds Designer.
- If you have an action called General Inspection, you may want to implement it with an Inspection Task, whose execution would then be managed in Inspection Management.
- If you have an action with the description Review flow rate, pressure, and vibration for Pump 1, you may want to implement that action with a Health Indicator, which would then be displayed in Asset Health Manager to continuously monitor those items.

In an asset strategy, you can [implement an action](#) using one of the following means:

- Calibration Task
- Inspection Task
- Proof Test Task
- Rounds Classic
- Rounds Pro Step
- Lubrication Requirement
- Measurement Location
- Health Indicator
- Policy Instance

In addition, you can:

- Send actions to ASI for SAP, so that they can be implemented and executed in an SAP system.
- Create an EAM Work Request to create alerts that will help you build out a specific EAM structure. When you send the EAM Work Request, a General Recommendation is created in APM, which then sends the work request to your EAM system when it is saved.
- View execution history for actions.

## Access the Implement Actions Workspace

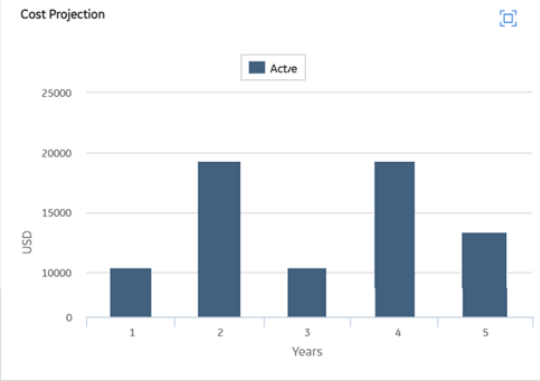
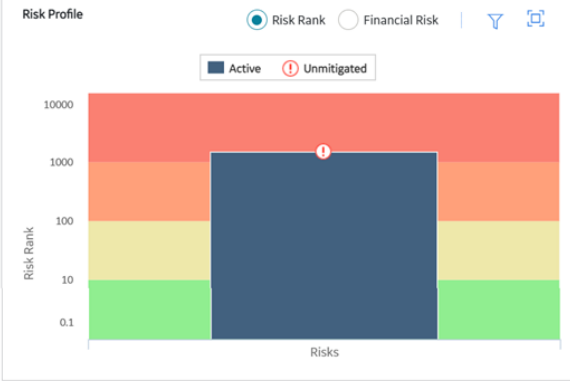
### About This Task

**Important:** The **Implement Actions** workspace is accessible only if the asset strategy is Active or Modified.

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Asset Strategies** tab.  
The **Asset Strategies** section appears, displaying a list of available asset strategies.
3. Select the strategy whose actions you want to implement.  
The **Strategy Details** workspace for the selected asset strategy appears.

Summary Details



Actions of Active Strategy

NAME	DESCRIPTION	ACTION TYPE	INTERVAL	INTERVAL UNITS	COST	MAX UNMITIGATED RISK	RELEVANCE	ROI
FMEA Action2		CM	8	Months	5,900	1,500	0	0
FMEA Action1		PM	12	Months	2,000	1,500	0	0
FMEA Action3		TRN	45	Weeks	2,500	1,500	0	0
Test Action		PM	20	Months	3,000	0	0	0

- Select the **Implement Actions** tab. The **Implement Actions** workspace appears.

ACTION NAME	INTERVAL	INTERVAL...	MODULE	IMPLEMENTATION	EAM WO...	LAST DATE	PACKAGE NAME
<input type="checkbox"/> (0) FMEA Action1	12	Months	ASI	FMEA Action1			New Secondary Package ⚠ WMI not implemented
<input type="checkbox"/> FMEA Action2	8	Months					
<input type="checkbox"/> FMEA Action3	45	Weeks					
<input type="checkbox"/> FMEA Action	20	Months					

## About Calibration Tasks

In the **Implement Actions** workspace, you can create corresponding [calibration tasks](#) for actions when you implement the actions. After you create the records, you can link to them from the **Implement Actions** workspace.

# Create New Calibration Task

## About This Task

In the **Implement Actions** workspace, you can create corresponding [calibration tasks](#) for actions when you implement the actions. After you create the records, you can link to them from the **Implement Actions** workspace.

## Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via new calibration task. The action is highlighted.
3. Select the **Implement** menu, and then select **Calibration Task**. The **Implement Calibration Task** window appears.

Implement Calibration Task

Link Existing  Create New

Cancel Implement

Selecting 'Implement' will create a new calibration task.

4. Select the **Create New** option, and then select **Implement** to create the new task. A message appears, confirming that the action has been implemented successfully.

## Results

- A new calibration task is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the calibration task appears.

## Link a Calibration Task

### About This Task

In the **Implement Actions** workspace, you can create corresponding [calibration tasks](#) for actions when you implement the actions. After you create the records, you can link to them from the **Implement Actions** workspace.

### Procedure


1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via calibration task link. The action is highlighted.

**Note:** The selected action must have previously been implemented as a calibration task.

3. Select the **Implement** menu, and then select **Calibration Task**. The **Implement Calibration Task** window appears.

Implement Calibration Task ✕

Link Existing  Create New



TASK ID	TASK DESCRIPTION	TASK TYPE
Overhaul		CALIBRATION

Rows per page 50  200 500 1 - 1 of 1 Results ← 1 →

[Cancel](#) [Implement](#)

4. Select the **Link Existing** option, and then select the action you want to link.
5. Select **Implement** to link to the existing calibration task.

## Results

- A new calibration task link is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the calibration task appears.

# Link Existing Health Indicators

## About This Task

In the **Implement Actions** workspace, you can link [health indicator](#) records when you implement the actions. Implementing an action with a health indicator creates a record in Asset Health Management that stores information used to determine the health of an asset.

## Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box in the row containing the action which you want to implement with a health indicator record.

**Note:** You can only link one health indicator record per action.

3. Select the **Implement** drop-down menu, and then select **Health Indicator**.  
The **Link To Existing Health Indicator** window appears, displaying a list of health indicators.

## Link To Existing Health Indicator



NAME	DESCRIPTION
test 1	test 1
Proto type	Proto type
test 2	test 2
Proto type character	Proto type char
asset 2	asset 2
HG1	KPI
Numeric1	ML
Character1	ML
AHI record without source	AHI record with
AHI1	Num
AHI1	cha

1 - 100 of 210 Results      ← Page 1 of 3 →

Cancel

Implement

4. Select the row containing the record that you want to link, and then select **Implement**. A message appears, confirming that the health indicator was linked successfully.

### Results

- The health indicator is linked to the action.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the health indicator record appears.
- The **Health Status** indicator appears on the **Strategy Details** page of the strategy. The indicator shows the overall status for the asset based on the health indicator diagnostics. The icons used to represent the health statuses are the same used in [Asset Health Manager](#).



## About Inspection Tasks

In the **Implement Actions** workspace, you can create and link corresponding [inspection tasks](#) for actions when you implement the actions. After you create the records, you can link to them from the **Implement Actions** workspace.

## Create New Inspection Task

### About This Task

In the **Implement Actions** workspace, you can create corresponding [inspection tasks](#) for actions when you implement the actions. After you create the records, you can link to them from the **Implement Actions** workspace.

### Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via new inspection task.  
The action is highlighted.
3. Select the **Implement** menu, and then select **Inspection Task**.  
The **Implement Inspection Task** window appears.

Implement Inspection Task

Link Existing  Create New

Cancel Implement

Selecting 'Implement' will create a new inspection task.

4. Select the **Create New** option, and then select **Implement** to create the new task.  
A message appears, confirming that the action has been implemented successfully.

## Results

- A new inspection task is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the inspection task appears.

## Link an Inspection Task

### About This Task

In the **Implement Actions** workspace, you can create corresponding [inspection tasks](#) for actions when you implement the actions. After you create the records, you can link to them from the **Implement Actions** workspace.

### Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via inspection task link.  
The action is highlighted.

**Note:** The selected action must have previously been implemented as an inspection task.


3. Select the **Implement** menu, and then select **Inspection Task**.  
The **Implement Inspection** task window appears.

Implement Inspection Task ×

---

Link Existing     Create New

---



TASK ID	TASK DESCRIPTION	TASK TYPE
work order	work order creation	

---

1 - 1 of 1 Results ← Page 1 of 1 →

---

[Cancel](#) Implement

4. Select the **Link Existing** option, and then select the action you wish to link to.

5. Select **Implement** to link to the existing task.

### Results

- A new inspection task link is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the inspection task appears.

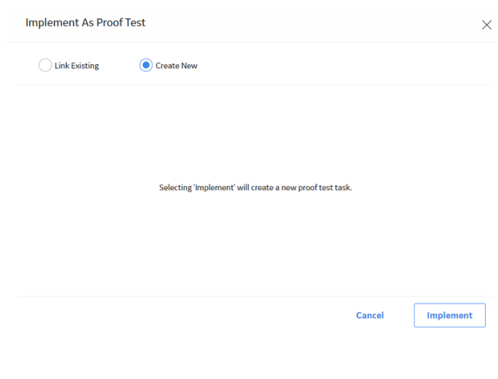
## About Proof Test Tasks

In the **Implement Actions** workspace, you can create and link a [proof test task](#) for actions when you implement the actions. After you create the records, you can link them to the Inspection task from the **Implement Actions** workspace.

## Create a Proof Test Task

### Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via a new proof test task.  
The action is highlighted.
3. Select the **Implement** menu, and then select **Proof Test Task**.  
The **Implement As Proof Test** window appears.



4. Select **Create New**, and then select **Implement**.  
A message appears, stating that the action has been implemented.

### Results

- A proof test task is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a link to the proof test task appears.

## Link a Proof Test Task

### Procedure

1. [Access Implement Actions](#).

- In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via the proof test task link.  
The action is highlighted.

**Note:** The selected action must have been previously implemented as a proof test task.

- Select the **Implement** menu, and then select **Proof Test Task**.  
The **Implement As Proof Test** window appears.

Implement As Proof Test

Link Existing  Create New

TASK ID	TASK DESCRIPTION	TASK TYPE
FMEA Action2	Filter	PROOF TEST

Rows per page: 50  200 500      1 - 1 of 1 Results    < 1 >

[Cancel](#) [Implement](#)

- Select **Link Existing**, and then select the action to which you want to link the proof test task.
- Select **Implement**.

### Results

- A proof test task link is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a link to the proof test task appears.

## Create New Measurement Location or Lubrication Requirement Records

### About This Task

In the **Implement Actions** workspace, you can create corresponding [measurement location and lubrication requirement records](#) to implement an action. After you create the records, you can link to them from the **Implement Actions** workspace.

### Procedure

- [Access Implement Actions](#).
- In the **Implement Actions** workspace, select the check box in the row containing the action you want to implement via a new Measurement Location or Lubrication Requirement record.  
The action is highlighted.
- Select the **Implement** drop-down menu from the upper-right corner, and then select **Rounds Classic**.  
The **Implement Actions** in the **Rounds Classic** window appears, depending on which type of implementation you selected, displaying a list of measurement location or lubrication requirement records from Rounds to which you could link the action.
- Select the **Create New From Template** option.  
A grid appears, displaying a list of available [template types](#).
- Select the template type you want to use, and then select **Implement**.  
A message appears, confirming that the action has been implemented.

## Results

- A new measurement location or lubrication requirement is created.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the measurement location or lubrication requirement appears.

# Link a Policy Instance

## About This Task

In the **Implement Actions** workspace, you can [link a policy instance](#) to implement an action. [Policy instances](#) are records that identify specific aspects you might want to monitor for an asset, in this case in accordance with actions which have already been identified for the associated asset strategy.

## Procedure

1. [Access Implement Actions](#).
2. On the **Implement Actions** workspace, select the check box in the row containing the action to which you want to link a policy instance.  
The action is highlighted.

**Note:** An action may not be linked to more than one policy instance.

3. Select the **Implement** drop-down menu, and then select **Policy Instance**.  
The **Implement Policy Instance** window appears.

## Implement Policy Instance



ID	NAME
UC3TestCase	UC3_Health_Index
Instance 1	QueryNode
Instance 1	Validate Constant node
Instance 1	ValidatePolicyDoesNotTrigger
Instance 1	ValidateCaseNode
InstanceValidate	ValidateFilterCount,Sum,AverageNodes
Instance with points	ValidatePointNode
Instance with linked EQandREC	PolicyWithLinkedRecommendation
Instance 1	Policy with health indicator
Instance 1	Non-trigger policy
Instance 1	logic path test

1 - 100 of 3755 Results      ← Page 1 of 38 →

Cancel

Implement

4. Select the policy instance with which you want to implement an action, and then select **Implement**. A message appears, confirming that the action has been implemented successfully.

### Results

- The policy instance is linked to the action.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the policy instance record appears.

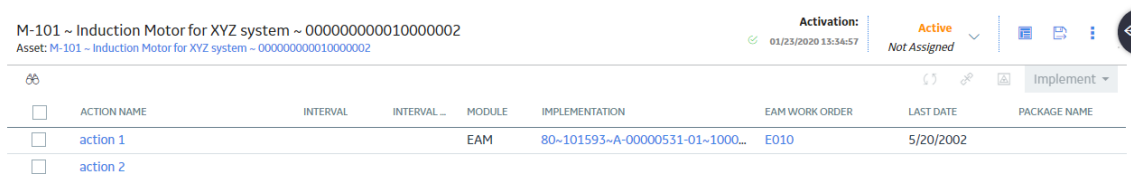
# Apply Updates to Implemented Actions

## Before You Begin

- [Modify action\(s\) as necessary](#). When you do so, the state assignment for the strategy is changed to Modified.

## Procedure


1. [Approve the strategy](#) whose related actions you modified.  
The strategy is changed back to the Active state.
2. In the pane, select the **Implement Actions** tab.  
The **Implement Actions** workspace appears.



M-101 ~ Induction Motor for XYZ system ~ 000000000010000002  
Asset: M-101 - Induction Motor for XYZ system - 000000000010000002

Activation: 01/23/2020 13:34:57 **Active** Not Assigned

<input type="checkbox"/>	ACTION NAME	INTERVAL	INTERVAL ...	MODULE	IMPLEMENTATION	EAM WORK ORDER	LAST DATE	PACKAGE NAME
<input type="checkbox"/>	action 1			EAM	80~101593~A-00000531-01~1000...	E010	5/20/2002	
<input type="checkbox"/>	action 2							

3. In the **Implement Actions** workspace, select the actions that you modified and that you want to update with their implementations, and then select .  
The updates are applied to the implemented actions. If any updates were unsuccessful, the **Errors** window appears, which contains a list of the unsuccessful updates.

# Unlink Implementations

## About This Task

These steps describes how to unlink implementations.


## Procedure

1. [Access the Implement Actions workspace](#).
2. Next to each implementation that you want to unlink, select the check box.  
The selected implementations are highlighted.

M-101 ~ Induction Motor for XYZ system ~ 00000000010000002  
 Asset: M-101 - Induction Motor for XYZ system ~ 00000000010000002

Activation: 01/23/2020 13:34:57 Active Not Assigned

<input type="checkbox"/>	ACTION NAME	INTERVAL	INTERVAL ...	MODULE	IMPLEMENTATION	EAM WORK ORDER	LAST DATE	PACKAGE NAME
<input type="checkbox"/>	action 1			EAM	80~101593~A-00000531-01~1000...	E010	5/20/2002	
<input type="checkbox"/>	action 2							

3. Select .  
A confirmation window appears.

Unlink Actions

---

Are you sure you want to unlink actions?

4. Select **Yes**.  
The selected implementations are unlinked.

## Link Existing Tasks to Actions

### About This Task

In the **Implement Actions** workspace, you can link [calibration and inspection tasks](#) when you implement the actions.

**Note:** To link an existing record, it cannot already be linked to another action.

### Procedure

1. [Access Implement Actions](#).
2. On the **Implement Actions** workspace, select the check box in the row containing the action you want to implement.  
The action is highlighted.
3. Select the **Implement** drop-down menu, and then select either **Calibration Task** or **Inspection Task**.  
A window appears with the **Link Existing** option selected, displaying a list of records you can link.




Implement Inspection Task
✕

---

Link Existing
 Create New

---



TASK ID	TASK DESCRIPTION	TASK TYPE
work order	work order creation	

---

1 - 1 of 1 Results
← Page 1 of 1 →

---

Cancel
Implement

- Select the row containing the calibration or inspection task that you want to link, and then select **Implement**.


A message appears, confirming that the task was linked successfully.

### Results

- The calibration or inspection task is linked to the action.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the calibration or inspection task appears.

## Send Approved Actions to an ASI Package

### Procedure

- Access the **Implement Actions** section.
- In the Implement Actions section, select the check box in the rows containing the implemented actions that you want to send to ASI, and then select  .  
The Send to ASI Package window appears, displaying a list of existing implementation packages that match the CMMS system of the Asset. By default, the **Link Existing** option is selected.

Send to ASI Package
✕

Link Existing     Create New

---

🔄

ID

Single Cycle Package in PRF

Strategy Plan in PRF

pkgWithAllWMI

Package for Multi-counter plan

Strategy Import from 2/2/2017 11:27:59 PM

ASI asdfasdf

100 Plan Package - c9ce154a-e173-479b-955e-b72f4a3e68b8 (1404 total

100 Plan Package - 354e70fb-f7ba-451b-b8cd-a9a934b6d2b9 (2204 total

100 Plan Package - 40b4-86bc-0c0c-25a741e7-1100 total

1 - 100 of 858 Results
← Page 1 of 9 →

Cancel
Send

**Note:** The maximum amount of records that you can select for one implementation is 250.

**Note:** The button will be enabled only if one of the following conditions are satisfied:

- The Asset is an equipment or a functional location.
  - the Asset has a CMMS system.
3. If you want to send the implemented actions to an existing ASI package, select the package to which you want to link them, and then select Send. Or, if you want to create a new ASI package and link the implemented actions to an existing ASI package, select Create New, then enter values in the available fields as needed, and then select Send.  
A message appears, confirming that your items have been sent to ASI.

## View Execution History for Actions

### Procedure

1. [Access Implement Actions.](#)
2. In the **Implement Actions** workspace, select a link in the **Action Name** column for the row containing the action for which you want to view the execution history.  
The **<Action Name>** window appears, displaying the **Action History** section that contains a list of execution history for the action.



Action Details Action History

Action ...  
ACTION 0...

Datasheet ID:  
Work History

Site:  
Roanoke, VA

WH-000040000009-0000800009  
Incomplete

WH-000040000008-000080000008  
3/25/2004 - Complete

WH-000040000006-000080000006  
6/24/2003 - Complete

WH-000040000005-000080000005

Identification History

	Value(s)	Description
Event ID (Work History)	WH-000040000009-0000800009	REPLACE SEAL
Event Type	Repair	
Request ID	000040000009	REPLACE SEAL
Request Type	M1	Maintenance request
Request Priority	2	High
Request System Status	NOCO	

[Cancel](#)

**Note:** You can view the Active Work Order information for Actions, and the date when the work order was last completed.

# Chapter 9

---

## EAM Integration

### Topics:

- [Create Actions from EAM Plans](#)
- [Implement an EAM Maintenance Plan](#)
- [Apply Action Updates to EAM Actions](#)
- [Link an Action to an EAM Maintenance Plan](#)
- [Implement an Action as an EAM Work Request](#)

# Create Actions from EAM Plans

This topic describes how to create actions from EAM Plans.

## Procedure

1. Access the [ASM Overview](#) page.
2. Select **Import**, and then select **From EAM**.  
The **Asset Strategy Builder (Import from EAM)** window appears.

<input type="checkbox"/>	ASSET ID	SHORT DESCRIPTION	ASSET FAMILY
<input type="checkbox"/>	~ ~ RBI EQU COMP ALL DATA		Equipment
<input type="checkbox"/>	~ ~		Equipment
<input type="checkbox"/>	~ ~ EQU W DM FILTER W REVIEW		Equipment
<input type="checkbox"/>	~ ~ EQU W PRD COMP TO BE LINKED TO UNIT		Equipment
<input type="checkbox"/>	~ ~ QA EQUIP FOR WEBAPI INSP		Equipment
<input type="checkbox"/>	~ ~ QA RBI 581 AST BTM DF CALC METRIC		Equipment
<input type="checkbox"/>	~ ~ QA RBI 581 CAUSTIC CRCK DF CALC		Equipment
<input type="checkbox"/>	~ ~ QA RBI 581 CONS CALC		Equipment
<input type="checkbox"/>	~ ~ QA RBI 581 CONS NFNT CALC		Equipment
<input type="checkbox"/>	~ ~ QA RBI 581 EXT THNG CUI DF CALC		Equipment
<input type="checkbox"/>	~ ~ QA RBI PIPELINE EQU W METRIC TNG		Equipment
<input type="checkbox"/>	~ ~ RBI 580 EQUIP FOR FLEXI DM & ANALYS ROLL UP		Equipment

1 - 100 of 3264 Results ← Page 1 of 33 →

Next

3. Select the check box for each asset that you want to import.
4. Select **Next**.  
The **Select EAM Actions** section appears.

Asset Strategy Builder (Import from EAM) ✕

Select Assets
Select EAM Actions
Summary

	ASSET	EAM ACTION TYPE	MAINTENANCE ITEM ID	OPERATION ID	PLAN ID	PLAN CYCLE	PLAN CYCLE UNIT
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Maintenance Item	000000000102704		00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0050	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0060	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0070	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0080	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0090	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0100	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0110	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0040	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0030	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0020	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0010	00000001624	5	Years
<input type="checkbox"/>	~ Harvey-Davidsun GLAD BOY.5444444777777 ~ 00000000010000461	Operations		0120	00000001624	5	Years

Rows per page: 50  200 500 1 - 13 of 13 Results ← 1 →

Previous
Next

5. Next to each Action that you want to import, select the check box.
6. Select **Next**.  
The **Summary** section appears.

Asset Strategy Builder (Import from EAM) ✕

Select Assets
Select EAM Actions
Summary

**You have selected 2 EAM Actions from 1 Asset to import**  
**Click Finish to Import the selected items**

Previous
Finish

7. Select **Finish**.

Asset Strategy Actions are created for the selected EAM Maintenance Items and EAM Operations. Also, for each selected asset for which an Asset Strategy did not already exist, one is created.

**Note:** A progress indicator appears. Once the process is complete, the date and time of the last import appears. If the process cannot be completed, an error message appears.

## Implement an EAM Maintenance Plan

### About This Task

In the **Implement Actions** workspace, you can implement a maintenance plan to create a recommendation in the EAM system for the selected [Actions](#).

### Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, select the check box for each row containing an action that you want to include in the maintenance plan. The Actions are highlighted.

**Note:** The maximum number of records that you can select for one implementation is 250.

3. In the workspace, select **Implement**, and then select **EAM Maintenance Plan**.

The **Implement as EAM Maintenance Plan** window appears.

Implement as EAM Maintenance Plan ×

Link Existing  Create New

This implementation method is intended to request the creation, update or deletion of EAM Maintenance Plans for the selected Actions. Selecting 'Implement' will create a General Recommendation with an associated export (csv) file containing the details of each selected Action.

**Create EAM Work Request**  
*Selecting this option will create a single work request in your EAM system that will contain a link to the General Recommendation created above*

Cancel Implement

**Note:** If you need to create an EAM Work Request, select the **Create EAM Work Request** check box.

4. Select **Send**.

A message appears, confirming that the maintenance plan has been implemented successfully.

### Results

- A General Recommendation is created and linked to the asset.
- The General Recommendation contains a reference document with the details for each selected action.

- If the **Create EAM Work Request** check box is selected, before selecting **Implement**, a work request is created in the EAM system that contains a link to view the General Recommendation in APM.

## Apply Action Updates to EAM Actions


### Before You Begin

- [You can modify actions as necessary](#). When you modify actions, the state assignment for the strategy is changed to Modified.

### Procedure

1. [Approve the strategy](#) whose related actions you have modified. The strategy is changed back to the Active state.
2. In the pane, select the **Implement Actions** tab. The **Implement Actions** workspace appears.

<input type="checkbox"/>	ACTION NAME	INTERVAL	INTERVAL UNITS	MODULE	IMPLEMENTATION
<input type="checkbox"/>	Check Lubrication	2	Months		
<input type="checkbox"/>	Overhaul	2	Years		000000001593~0000000
<input type="checkbox"/>	Performance Test	8	Months	EAM	000000001593~0000000 ▲ Requires Update
<input type="checkbox"/>	Plan1	2	Months		
<input type="checkbox"/>	ROOT	1	Months	ASI	ROOT
<input type="checkbox"/>	test feras 2 - Copy	1	Months		
<input type="checkbox"/>	Vibration Analysis	1	Years		A-00000525-01~0030 ▲ Requires Update

3. In the **Implement Actions** workspace, next to the Actions that you have modified and require updates to their implementations, select the check box, and then select .

**Note:** If an Action is implemented in the EAM module, then an additional window appears with an option to select if you want to create an EAM work request.

4. Select **Yes**, to send a notification to the EAM system.



Apply Updates

---

Would you like to send notifications to the EAM?

Yes  No

---

[Cancel](#)

The updates are applied to the Implemented Actions. If any updates are unsuccessful, the **Errors** window appears, containing a list of unsuccessful updates.

**Note:** If you change the plan in the EAM system after you have updated APM, then an indicator appears, alerting you that the Action interval is not in sync.

### Results

- A General Recommendation is created and linked to the asset.
- The General Recommendation contains a reference document with the details for each selected action.
- If in the **Apply Updates** window, you selected **Yes**, then a work request is created in the EAM system that contains a link to view the General Recommendation in APM.

## Link an Action to an EAM Maintenance Plan

### About This Task

In the **Implement Actions** workspace, you can link [EAM Maintenance Plans](#) when you implement the actions.

### Before You Begin

To link an EAM Maintenance Plan, it cannot already be linked to another action.

### Procedure

1. [Access Implement Actions](#).
2. In the **Implement Actions** workspace, next to the action that you want to link, select the check box. The action is highlighted.
3. Select the **Implement** menu, and then select **EAM Maintenance Plan**. A window appears with the **Link Existing** option selected, displaying a list of records.

Implement as EAM Maintenance Plan ✕

Link Existing
  Create New

ASSET	EAM ACTION TYPE	MAINTENANCE ITEM ID	OPERATION ID	PLAN I
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Maintenance Item	0000000000102704		0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0050	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0060	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0070	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0080	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0090	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0100	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0110	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0040	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0030	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0020	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0010	0000
~ Harvey-Davidsun GLAD BOY..5444444777777 ~ 000000000010000461	Operations		0120	0000

Rows per page: 50  200 500
 1 - 13 of 13 Results ←  →

Cancel Send

- Select the row containing the EAM Maintenance Plan that you want to link, and then select **Send**. A message appears, confirming that the action was linked successfully.

### Results

- The EAM Maintenance Plan is linked to the action.
- In the **Implement Actions** workspace, in the **Implementation** column of the action you implemented, a link to the EAM Maintenance Plan appears.

## Implement an Action as an EAM Work Request

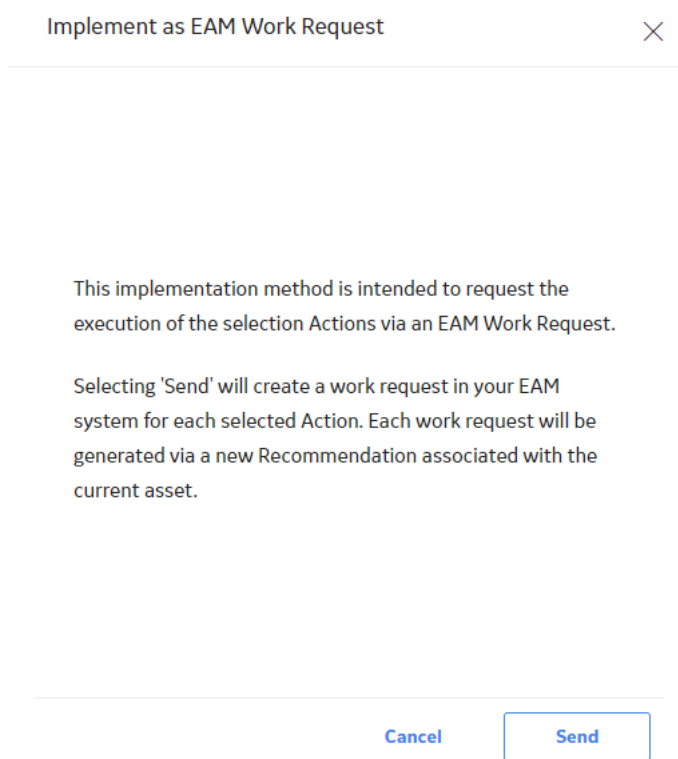
### About This Task

In the **Implement Actions** workspace, you can send a work request to create an implementation in the EAM system for the selected [Actions](#).

### Procedure

- [Access Implement Actions](#).
- In the **Implement Actions** workspace, select the check box in each row containing an action that you want to include in the work request. The actions are highlighted.
- In the workspace, select the **Implement** drop-down menu, and then select **EAM Work Request**.

The **Implement as EAM Work Request** window appears.



4. Select **Send**.

A message appears, confirming that the work request has been sent successfully.

**Results**

- A work request is sent to the EAM system for the associated asset.
- The work request contains details about each action selected, such as the action name, description, the strategy ID, site ID, as well as others.
- The work request is created to alert the user that items need to be created to build out a specific EAM structure and ultimately to implement the strategy.

# Chapter 10

---

## Rounds Integration

### Topics:

- [Create Actions from Measurement Locations](#)

# Create Actions from Measurement Locations

This topic describes how to create actions from Measurement Locations.

## Procedure

1. Access the [ASM Overview](#) page.
2. Select the **Import** button, and then select **From Rounds**.  
The **Import from Rounds** window appears containing a list of assets. From the **Select Items For Import** section, you can select one or more assets to access a list of corresponding Measurement Locations.

### Import from Rounds ✕

Select Items For Import / Select Measurement Location / Summary

By Asset    By Route

<input type="checkbox"/>	ASSET ID	ASSET FAMILY
<input type="checkbox"/>	~~ RBI EQU COMP ALL DATA	Equipment
<input type="checkbox"/>	~~	Equipment
<input type="checkbox"/>	~~ EQU W DM FILTER W REVIEW	Equipment
<input type="checkbox"/>	~~ EQU W PRD COMP TO BE LINKED TO UNIT	Equipment
<input type="checkbox"/>	~~ QA EQUIP FOR WEBAPI INSP	Equipment
<input type="checkbox"/>	~~ QA RBI 581 AST BTM DF CALC METRIC	Equipment
<input type="checkbox"/>	~~ QA RBI 581 CAUSTIC CRCK DF CALC	Equipment
<input type="checkbox"/>	~~ QA RBI 581 CONS CALC	Equipment
<input type="checkbox"/>	~~ QA RBI 581 CONS NFNT CALC	Equipment
<input type="checkbox"/>	~~ QA RBI 581 EXT THNG CUI DF CALC	Equipment
<input type="checkbox"/>	~~ QA RBI PIPELINE EQU W METRIC TNG	Equipment

Rows per page 100 ⌵   ← 1 of 27 →

Next

You can also select one or more routes from a list of available routes to access a list of corresponding Measurement Locations by selecting the **By Route** option.

## Import from Rounds



Select Items For Import

Select Measurement Location

Summary

By Asset  By Route

<input type="checkbox"/>	ROUTE ID	ROUTE DESCRIPTION
<input type="checkbox"/>	Blue 12 ROA - NO route schedule	OPR Route w/ Bluetooth MLs
<input type="checkbox"/>	One-K	Performance Route (1024 MLs)
<input type="checkbox"/>	Health Indicator Route - ROA - 30 MLs with schedul	
<input type="checkbox"/>	Health Indicators 2 - ROA - 26 MLs with schedules	
<input type="checkbox"/>	Pump and Motor Route 1	Pump and Motor Route 1
<input type="checkbox"/>	Risk Demo	MLs for Risk Demo Asset
<input type="checkbox"/>	2-Route-Scan ROA NO route sched	2-Route-Scan
<input type="checkbox"/>	CHS Test 10 - ROA - 20 min schedule	10 MLs for testing CHS
<input type="checkbox"/>	Route for Performance Test	Route for Performance Test
<input type="checkbox"/>	Performance Route-01	Performance Route-01- Scheduled at Route level
<input type="checkbox"/>	Route with Unscheduled Pressure Assessment	Route with Unscheduled Pressure Assessment

Rows per page 100

← 1 of 1 →

Next

3. Select the check boxes for the assets or routes for which, you want to access the list of Measurement Locations.
4. Select **Next**.  
The **Select Measurement Location** section appears.

## Import from Rounds



Select Items For Import

Select Measurement Location

Summary



<input type="checkbox"/>	MEASUREMENT LOCATION	ROUTE	ASSET ID
<input type="checkbox"/>	Bt ML PMP-4030	Blue 12 ROA - NO route schedule	PMP-4030 LEAN AMINE/D101 &101A
<input type="checkbox"/>	Bt ML PMP-4030	Blue 12 ROA - NO route schedule	B0003-114 ~ BOILER - NORTH BOILER H
<input type="checkbox"/>	Bt ML PMP-4032	Blue 12 ROA - NO route schedule	PMP-4032 LEAN AMINE/CHD HP ABS
<input type="checkbox"/>	General Check PMP-4040	Blue 12 ROA - NO route schedule	PMP-4040 STRIPPER REFLUX SPARE
<input type="checkbox"/>	General Check PMP-4043	Blue 12 ROA - NO route schedule	PMP-4043 CONDENSATE SURF COND
<input type="checkbox"/>	Bt ML PMP-4017	Blue 12 ROA - NO route schedule	PMP-4017 #14 CLARIFIER PUMP (M)
<input type="checkbox"/>	Bt ML PMP-4023	Blue 12 ROA - NO route schedule	PMP-4023 HIGH PRESS STEAM CONDEN
<input type="checkbox"/>	Bt ML PMP-4024	Blue 12 ROA - NO route schedule	PMP-4024 HIGH PRESS STEAM CONDEN
<input type="checkbox"/>	Bt ML PMP-4029	Blue 12 ROA - NO route schedule	PMP-4029 LEAN AMINE/D101 & 101A
<input type="checkbox"/>	Bt ML PMP-4039	Blue 12 ROA - NO route schedule	PMP-4039 N STRIPPER RFLX
<input type="checkbox"/>	Bt ML PMP-4044	Blue 12 ROA - NO route schedule	PMP-4044 CONDENSATE SURF COND
<input type="checkbox"/>	Bt ML PMP-4033	Blue 12 ROA - NO route schedule	PMP-4033 LEAN AMINE/CHD HP ABS

Rows per page 100

← 1 of 1 →

Previous

Next

5. Select the check boxes for the Measurement Locations that you want to import.
6. Select **Next**.  
The **Summary** section appears.

Import from Rounds ×

---

Select Items For Import      Select Measurement Location      Summary

You have selected 1 Measurement Locations from 1 Routes to import  
Click Finish to Import the selected items

[Previous](#)      [Finish](#)

7. Select **Finish**.

Actions are created for the selected Measurement Locations. Also, asset strategies will be created for each selected asset, if no strategies existed.

**Note:** A progress indicator appears. After the process is complete, the date and time of the last import appears. If the process fails, an error message appears.



# Chapter 11

---

## Risks and Actions

### Topics:

- [About Risks and Actions](#)
- [Access Risks and Actions](#)
- [Create a Risk or Action Without a Context](#)
- [Create a Risk Without Any Context or in the Context of an Action](#)
- [Create an Action in Context of a Risk](#)
- [Create a Mitigated Risk in the Context of an Action](#)
- [Modify a Risk or Action](#)
- [Copy a Risk or Action](#)
- [Delete a Risk or Action](#)
- [Undo a Risk or Action](#)
- [Supersede Actions](#)
- [Unlink Superseded Actions](#)
- [Link a Risk or Action](#)
- [Unlink a Risk or Action](#)

## About Risks and Actions


A risk identifies a way that a location or a piece of equipment can fail, as well as the consequence of the failure. This consequence is presented as a risk rank value, which is determined from the values that you select in the Risk Assessment interface that appears when you create a risk. After you have created an Asset Strategy record, you can begin adding risks to the asset strategy.

The values that you specify in a risk are stored in a Risk record. Throughout this documentation, unless it is necessary to refer to the record itself, we use the term risk.

An action identifies the physical ways in which you maintain a piece of equipment or location. For example, an action might indicate that you want to perform a visual inspection of a piece of equipment. After you have created an Asset Strategy record, you can begin adding actions to the asset strategy.



The values you specify in an action are stored in an Action record. Throughout this documentation, however, unless it is necessary to refer to the record itself, we use the term action.

### Switch the Positions of the Risks and Actions Columns

In the **Risks and Actions** workspace, you can switch the position of the risks and actions columns by selecting .

Whichever column appears in the left side of the workspace, **Risks** or **Actions**, is in the primary position and is selectable. This means that, for example, if the **Risks** column is on the left and you select a particular risk, all the actions that mitigate that risk appear in the **Mitigating Actions** column on the right. Similarly, if the **Actions** column is on the left and you select a particular action, all the risks that are mitigated by that action appear in the **Mitigated Risks** column on the right.

### Expand Risks and Actions Cards

The cards in the **Risks and Actions** workspace can be expanded to display more details by selecting , and then collapsed by selecting .

When you expand an Action card, the following information is displayed:

- Datasheet for the action.
- A list of linked actions under the heading Superseded Actions.

When you expand a Mitigating Action card, the following information is displayed:

- Datasheet for the action.
- Risk matrix with unmitigated risk assessment (not editable) and mitigated risk assessment (editable).


When you expand a Risk card, the following information is displayed:

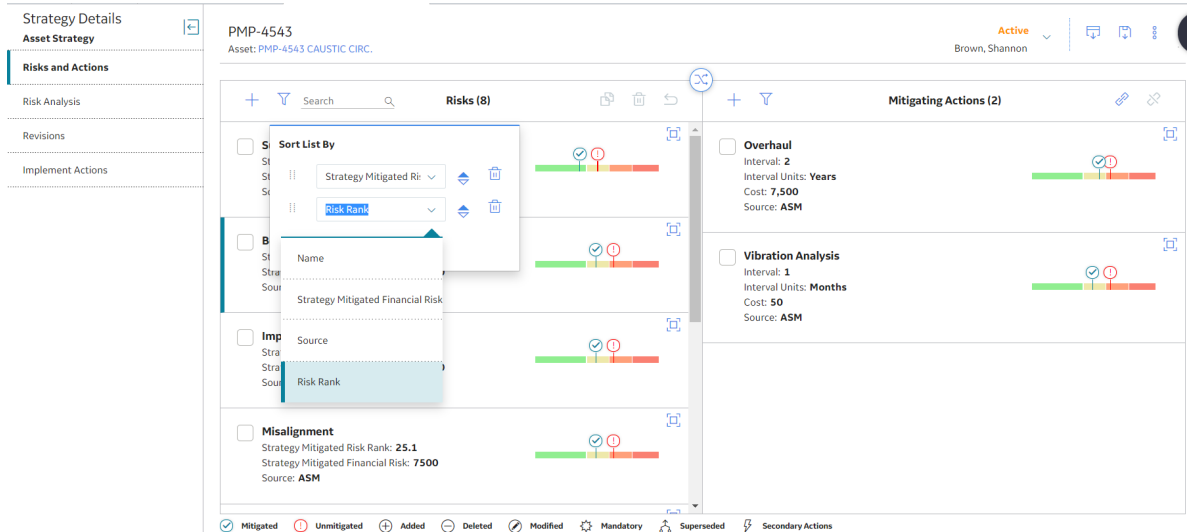
- Datasheet for the risk.
- Risk matrix with editable unmitigated risk assessment.

When you expand a Mitigated Risk card, the following information is displayed:





- Datasheet for the risk.
- Risk matrix with the unmitigated risk assessment (not editable) and mitigated risk assessment (editable).

## Sort Risks and Actions

Risks and actions can be sorted to display the items that you are most interested in viewing from a large list by selecting .



In the **Sort List By** box, you have the following options:

- **Sort by Field:** Select the individual drop-down list boxes in the control to select the fields by which you want to sort.  
**Note:** Consult the ASM Admin section.
- **Sort in Ascending or Descending Order:** Select  to toggle between ascending and descending order for each sort condition.
- **Add Multiple Conditions to Sort by:** Select  **Add Sort Condition** to add a sort condition.
- **Delete a Sort Condition:** Select  beside a sort condition to delete it.
- **Rearrange Order of Sort Conditions:** Select  to drag-and-drop sort conditions into different positions in the sort hierarchy.

As you make selections in the **Sort List By** box, the grid sorts accordingly.

## Search Risks and Actions

Risks and actions can be searched to display the items that you are most interested in viewing from a large list by typing few characters of risk or action name in the **Search** box.

Strategy Details

Asset Strategy

Risks and Actions

Risk Analysis

Revisions

Implement Actions

~ ~ RBI COMP HAS ACC BY ASM ANLYS

Asset: ~ ~ RBI COMP HAS ACC BY ASM ANLYS

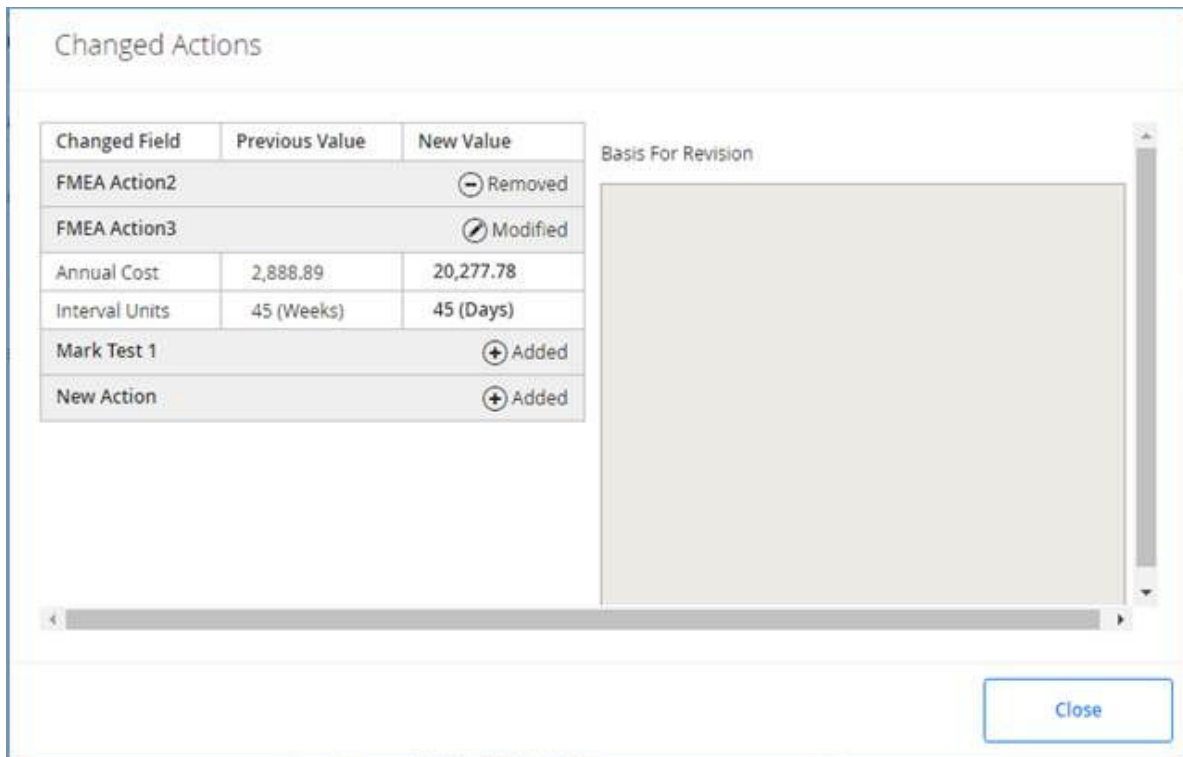
Actions (2)

- Criticality Calculator External Corrosion - CUI** +
  - Interval: **240**
  - Interval Units: **Months**
  - Cost:
  - Source: **RBI**
- Criticality Calculator External Corrosion - EXTERNAL VISUAL - INSULAT...** +
  - Interval: **240**
  - Interval Units: **Months**
  - Cost:
  - Source: **RBI**

Mitigated Unmitigated Added Deleted Modified Mandatory Superseded






### View Changes to a Modified Strategy

You can view a summary of the changes made to a modified strategy by selecting **XX Action Changes** at the upper-right area of the strategy record. When you select it, the **Changed Actions** window appears, listing the actions and fields that have changed on the left and the read-only Basis For Revision/Rework on the right. If a strategy is in a Pending Review state, the **Basis For Revision** will appear. If a strategy is in a Modified state, having gone through a rework, the **Basis For Rework** will appear. Only actions that have changed appear in the list of fields; not risks.



### Modifying Risks, Actions, and Assessments

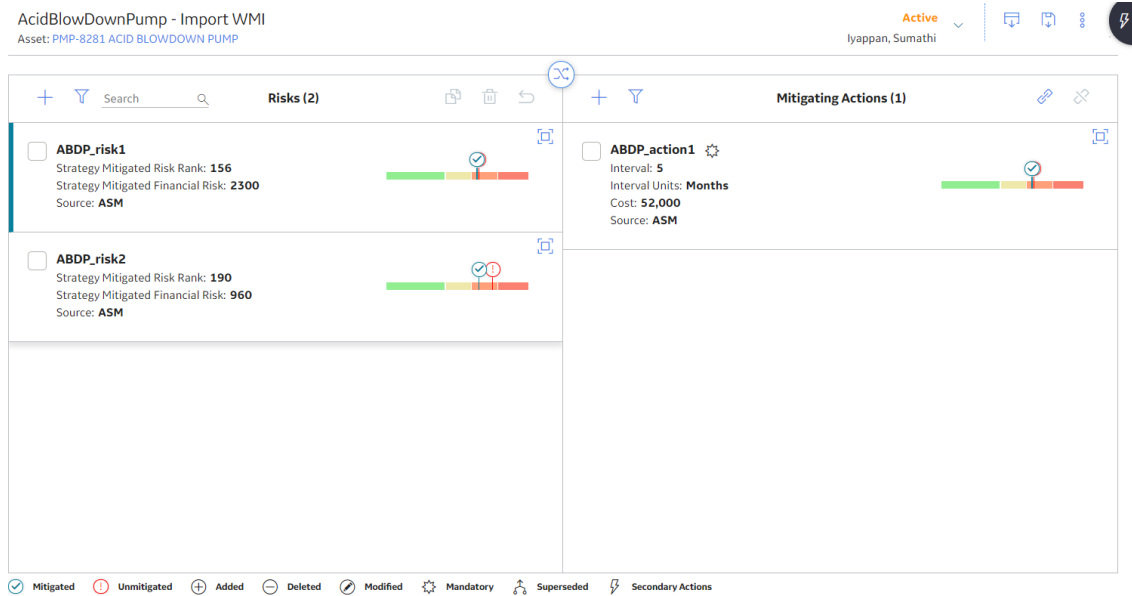
When an action or a risk appears in the right column of the grid in the **Risks and Actions** workspace, the status displayed is the status of the Risk Assessment. The following table lists examples of operations and their resulting statuses.

Operation	Resulting Status in the Right Pane
Modify a risk or action directly without affecting the assessment.	No status icon will be displayed.
Modify the assessment without modifying the risk or action.	Status icon will be  .
Link an existing action or risk.	Status icon will be  .
Link a new action or risk.	Status icon will be  .
Unlink an existing assessment.	Status icon will be  .
Unlink a new assessment.	Risk or action card will no longer be displayed.
Delete an existing risk that has mitigating action(s).	Status icon will be  .

# Access Risks and Actions


## Procedure

1. [Access Asset Strategies](#).
2. Select the strategy whose risks and actions you want to access.  
The **Strategy Details** workspace for the selected asset strategy appears.
3. Select the **Risks and Actions** tab.  
The **Risks and Actions** workspace appears.



# Create a Risk or Action Without a Context

## Procedure


1. [Access Risks and Actions](#).
2. In the **Risks and Actions** workspace, in the grid, select .  
The column positions are switched. The **Actions** column is now the left column.



- In the **Actions** column, select . A blank datasheet appears for the new action record.

- As needed, enter values in the **available fields** and use the risk matrix control to **assess the risk**.
- Select . The record is saved.

# Create a Risk Without Any Context or in the Context of an Action

## Procedure

1. Access **Risks and Actions**.
2. In the **Risks** column, select .  
A blank datasheet appears for the new risk record.

Source: ASM  

---

Datasheet ID:

**Main** | Detail

Risk ID:

Risk Rank:       Financial Risk:


Name:  
  
This field is required

Description:


Risk Basis:

### Total Risk

		Consequence		
		Very Low	Low	Medium
Probability	Frequent	5	50	500
	Probable	1	10	100
	Possible	0.3	3	30
	Remote	0.1	1	10
	Improbable	0.05	0.5	5


Not Applicable       Mitigated Risk: 

Basis for Assessment

3. As needed, enter values in the **available fields** and use the risk matrix control to **assess the risk**.
4. Select .  
The record is saved.

# Create an Action in Context of a Risk

## Procedure

1. Access **Risks and Actions**.
2. In the **Mitigating Actions** column, select .  
A blank datasheet appears for the new action record.



Datasheet ID:  
Action

Action ID:  
AcidBlowDownPump - Import WN

Action Basis:  
Text input

Name:  
Text input  
This field is required


Description:  
Text area

Action Type:  
Dropdown

Condition Monitoring Type:  
Dropdown


**Total Risk 185**

	Probability	Consequence		
		Very Low	Low	Medium
Safety 150		1	10	100
Environm... 30	Frequent 5	5	50	500
Operations 5	Probable 1	1	10	100
Financial 11,500.00	Possible 0.3	0.3	3	30
	Remote 0.1	0.1	1	10
	Improbable 0.05	0.05	0.5	5

Not Applicable  Mitigated Risk: 



**Basis for Assessment**

reason for assessment

- As needed, enter values in the [available fields](#) and use the risk matrix control to [assess the risk](#).
- Select .  
The record is saved.

## Create a Mitigated Risk in the Context of an Action

### Procedure

- Access [Risks and Actions](#).
- In the **Risks and Actions** workspace, in the grid, select .  
The column positions are switched. The **Mitigated Risks** column is now the right column.
- In the **Mitigated Risks** column, select .  
A blank datasheet appears for the new mitigated risks record.

Source: ASM | Mitigating Action : ABDP\_action1

Datasheet ID: Risk

Main | Detail

Risk ID: AcidBlowDownPump - Import WMI-R03

Risk Rank: Numeric | Financial Risk: Numeric

Name: Text input  
This field is required

Description: Text area

Risk Basis: Text input

### Total Risk

		Consequence		
		Very Low	Low	Medium
Probability	Frequent 5	5	50	500
	Probable 1	1	10	100
	Possible 0.3	0.3	3	30
	Remote 0.1	0.1	1	10
	Improbable 0.05	0.05	0.5	5

Not Applicable |  Mitigated Risk:

Basis for Assessment

- As needed, enter values in the [available fields](#) and use the risk matrix control to [assess the unmitigated risk](#).



**Note:** You will only be able to do an unmitigated assessment in this view before saving the new risk. After that, to edit the unmitigated risk assessment, you must switch the column positions by selecting . Usually, you can only edit the mitigated risk assessment when in the context of an action.

- Select . The record is saved and the unmitigated risk assessment is used to initialize the mitigated risk assessment.
- Use the risk matrix control to [assess the mitigated risk](#).
- Select . The risk is saved.

## Modify a Risk or Action

### Procedure

- Access [Risks and Actions](#).
- Select in the card for the risk or action that you want to modify on either side of the **Risks and Actions** workspace. The card expands for the risk or action that you selected, displaying the datasheet.

ABDP\_action2 Source: ASM  

Datasheet ID:

Action ID:

Action Basis:

Name:

Description:

Action Type:

Condition Monitoring Type:

Interval:



Interval Units:

Nonrec...

Performance In...


Performance In...

**Consolidated Actions (0)** Secondary Actions (0)

<input type="checkbox"/>	(0)	NAME	DESCRIPTION
No Data			

0 - 0 of 0 Results ← Page 1 of 1 →

- As needed, modify the values in the [available fields](#) and use the risk matrix control to [assess the risk](#).
- Select .  
The record is saved and the card for the risk or action is updated.


**Note:** If you modify actions that were previously implemented, you must [apply the updates you made to the implemented actions](#).


## Copy a Risk or Action

### Procedure

- Access [Risks and Actions](#).

**Note:** In the **Risks and Actions** workspace, in the grid, only items in the left column can be copied.

Depending on whether you want to copy a risk or an action, if needed, select  to switch the column positions.

- Select the check box next to the risk or action that you want to copy, and then select .  
The new copy of the risk or action will appear in the column and will be selected. None of the items associated with the copied item will be copied, but only the original copied item itself.

## Delete a Risk or Action


### Before You Begin


The Strategy must be in an Active or Modified state before any risks or actions can be removed.


### Procedure

1. Access **Risks and Actions**.

**Note:** In the **Risks and Actions** workspace, in the grid, only items in the left column can be copied.

Depending on whether you want to delete a risk or an action, if needed, select  to switch the column positions.


2. Select the check box inside the card for the item that you want to delete, and then select .  
The **Confirm Delete** dialog box appears, asking you to confirm that you want to delete the risk or action.
3. Select **Yes**.


The risk or action is marked for removal and a  is displayed on the applicable risk or action card. When the state of the strategy is set to Active again, the deleted item will disappear from the risks or actions column.

## Undo a Risk or Action

### Procedure

1. Access **Risks and Actions**.

**Note:** In the **Risks and Actions** workspace, the undo operation can only be executed in the left column. Depending on whether you want to carry out the undo operation on a risk or an action, if needed, select  to switch the column positions.

2. Select the check box inside the card for the item whose last action should be undone, and then select .

A message appears, asking you to confirm that you want to undo the last action taken against the selected item.

3. Select **Yes**.  
The last action taken against the selected item is undone. No icon appears in the card for the item, as it is now unmodified.

**Note:** If an item was newly added, then the undo operation will remove it entirely.


## Supersede Actions



### Before You Begin

This topic assumes that at least two actions have been added to the selected strategy.

## Procedure

1. Access [Risks and Actions](#).

**Note:** In the **Risks and Actions** workspace, in the grid, only items in the left column can be superseded. Depending on whether you want to supersede actions, if needed, select  to switch the column positions.

2. Select the check box in the card for each action that you want to supersede, and then select  . The **Supersede Actions** window appears.
3. Select the radio button next to the action that you want to supersede the others, and then select **Supersede**. The superseded actions are now activated and appear in the **Superseded Actions** section of the expanded action card for the superseding action, and the superseding action's card now contains a  button.
4. In the **Supersede Actions** section, in the **Name** column, you can select the link to access the details of the action.
5. In the **Secondary Actions** section, in the **Name** column, you can select the link to access the details of the secondary action.

**Note:** Any secondary actions that were linked to the superseded action are now linked to the superseding target action.


## Unlink Superseded Actions



### Before You Begin

This topic assumes that the selected strategy contains [Superseded Actions](#).

### Procedure

1. Access [Risks and Actions](#).


**Note:** In the **Risks and Actions** workspace, in the grid, only items in the left column can be superseded. Depending on whether you want to supersede risks or actions, if needed, select  to switch the column positions.

2. Select  on the card for the superseding action that you want to expand. The action card expands, displaying the action's datasheet on the left and the **Superseded Actions** section on the right.
3. In the **Superseded Actions** section, select the action that you want to unlink, and then select  . The action is removed from the **Superseded Actions** section and returns to the **Actions** column in the **Risks and Actions** workspace.

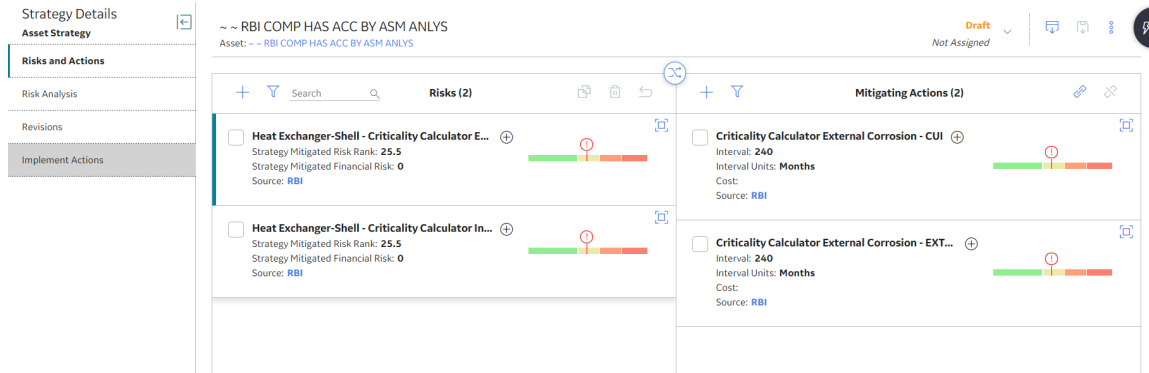
## Link a Risk or Action


### Procedure

1. Access [Risks and Actions](#) .

**Note:** In the **Risks and Actions** workspace, in the grid, only items in the right column can be linked. Depending on whether you want to link a risk or an action, if needed, select  to switch the column positions.

2. In the left column, select the card for the item to which you want to link a mitigating action or a mitigated risk.  
The card for the item is highlighted with a blue edge.



3. In the grid, select .  
The **Link Actions** or the **Link Risks** window appears, displaying a list of available items that you can link to the risk or action that you selected in the pane.

## Link Actions



<input type="checkbox"/>	ACTION NAME	DESCRIPTION
<input type="checkbox"/>	Check Gas Composition	Sample Tail Gas composition every 6 months to en
<input type="checkbox"/>	Dye Penetrant Inspection of Disk/Blade assembly	Dye Penetrant Inspection of Disk/Blade assembly c
<input type="checkbox"/>	Monitor low-frequency non-synchronous vibration	Monitoring low-frequency non-synchronous vibrat
<input type="checkbox"/>	Monitor polytropic efficiency	Policy to calculate polytropic compressor efficienc
<input type="checkbox"/>	Vibration Monitoring	Automatic vibration monitoring to detect early sig

1 - 5 of 5 Results

← Page 1 of 1 →

Cancel


Link

4. Select the check box for each item you want to link, and then select **Link**.  
The selected items are linked.

## Unlink a Risk or Action

### Procedure

1. Access **Risks and Actions**.

**Note:** In the **Risks and Actions** workspace, in the grid, items can only be unlinked from the right column. Depending on whether you want to unlink a risk or an action, if needed, select  to switch the column positions.

2. In the left column, select the card for the item from which you want to unlink a mitigating action or a mitigated risk.  
The card for the item is highlighted with a blue edge.

Strategy Details

Asset Strategy

Risks and Actions

Risk Analysis

Revisions


Implement Actions

~ ~ RBI COMP HAS ACC BY ASM ANLYS

Asset: ~ ~ RBI COMP HAS ACC BY ASM ANLYS

Draft Not Assigned

Risks (2)	Mitigating Actions (2)
<input type="checkbox"/> Heat Exchanger-Shell - Criticality Calculator E... Strategy Mitigated Risk Rank: 25.5 Strategy Mitigated Financial Risk: 0 Source: RBI	<input type="checkbox"/> Criticality Calculator External Corrosion - CUI Interval: 240 Interval Units: Months Cost: Source: RBI
<input type="checkbox"/> Heat Exchanger-Shell - Criticality Calculator In... Strategy Mitigated Risk Rank: 25.5 Strategy Mitigated Financial Risk: 0 Source: RBI	<input type="checkbox"/> Criticality Calculator External Corrosion - EXT... Interval: 240 Interval Units: Months Cost: Source: RBI

- In the right column, select the check box for each mitigating action or mitigated risk that you want to unlink from the highlighted item, and then, in the upper-right corner of the grid, select . A message appears, asking you to confirm that you want to unlink the selected items.
- Select **Yes**. The items are unlinked.



# Chapter 12

---

## Secondary Actions

### Topics:

- [About Secondary Actions](#)
- [Access Secondary Actions](#)
- [Create a Secondary Action](#)
- [Delete a Secondary Action](#)

## About Secondary Actions

A Secondary action is associated with a primary action. It defines the corrective actions that should be performed to mitigate an undesirable condition that is found while performing primary maintenance, monitoring, or data collection activity.

## Access Secondary Actions

### Procedure


1. [Access Asset Strategies](#).
2. Select the strategy whose secondary action you want to access.  
The **Strategy Details** workspace for the selected asset strategy appears.
3. Select the **Risks and Actions** tab.  
The **Risks and Actions** workspace appears.

AcidBlowDownPump - Import WMI  
Asset: PMP-8281 ACID BLOW/DOWN PUMP

Active  
Iyappan, Sumathi

Risks (2)	Mitigating Actions (1)
<input type="checkbox"/> <b>ABDP_risk1</b> Strategy Mitigated Risk Rank: 156 Strategy Mitigated Financial Risk: 2300 Source: ASM	<input type="checkbox"/> <b>ABDP_action1</b> ⚙️ Interval: 5 Interval Units: Months Cost: 52,000 Source: ASM
<input type="checkbox"/> <b>ABDP_risk2</b> Strategy Mitigated Risk Rank: 190 Strategy Mitigated Financial Risk: 960 Source: ASM	

Mitigated Unmitigated Added Deleted Modified Mandatory Superseded Secondary Actions

4. In the **Risks and Actions** workspace, in the grid, select .  
The column positions are switched. The **Actions** column is now the left column.

Strategy Details  
Asset Strategy

AcidBlowDownPump - Import WMI  
Asset: PMP-8281 ACID BLOWDOWN PUMP

Active  
lyappan, Sumathi

Risks and Actions

Risk Analysis

Revisions

Implement Actions


Actions (2)

- ABDP\_action1**
  - Interval: 5
  - Interval Units: Months
  - Cost: 52,000
  - Source: ASM
- ABDP\_action2**
  - Interval: 12
  - Interval Units: Weeks
  - Cost: 64,000
  - Source: ASM

Mitigated Risks (2)

- ABDP\_risk1**
  - Action Mitigated Risk Rank: 156
  - Strategy Mitigated Risk Rank: 156
  - Strategy Mitigated Financial Risk: 2300
  - Source: ASM
- ABDP\_risk2**
  - Action Mitigated Risk Rank: 190
  - Strategy Mitigated Risk Rank: 190
  - Strategy Mitigated Financial Risk: 960
  - Source: ASM

Mitigated
  Unmitigated
  Added
  Deleted
  Modified
  Mandatory
  Superseded
  Secondary Actions

- Select  in the card for the action for which you want to view the secondary action. The card expands for the action that you selected, displaying the datasheet.

FMEA Action2 Source: FMEA

Datasheet ID: Action

Action ID: ~ - PUMP-A01

Action Basis: RCM/FMEA Recommendation

Name: FMEA Action2

Description: Text area

Action Type: Condition-Based Maintenance (Predictive) (CM)

Condition Monitoring Type: Periodic

Interval: 8 Interval Units: Months

Nonrec...

Performance In... Performance In...  
Numeric inq

Consolidated Actions (0) Secondary Actions (1)

	STATUS	NAME	ACTION TYPE
<input type="checkbox"/>	(0)		
<input type="checkbox"/>	⊕	Secondary action	PROC

1 - 1 of 1 Results ← Page 1 of 1 →

- In the **Secondary Actions** section, select the action that you want to access. The datasheet for the selected secondary action appears.

FMEA Action2 Source: FMEA

---

Datasheet ID: Action

---

Action ID: ~ - PUMP-A01

Action Basis: RCM/FMEA Recommendation

Name: FMEA Action2

Description: Text area

Action Type: Condition-Based Maintenance (Predictive) (CM)

Condition Monitoring Type: Periodic

Interval: 8 Interval Units: Months

Nonrec...

Performance In... Numeric inf Performance In... ▼

Consolidated Actions (0) **Secondary Actions (1)**

[All Secondary Actions](#) > **Secondary action** >

Datasheet ID: Action

---

Action ID: ~ - PUMP-A01-SA-01

Action Basis: Text input

Name: Secondary action

Description: Text area

Action Type: Procedure (PROC)

Condition Monitoring Type: ▼

Interval: Numeric inf Interval Units: ▼

Nonrec...

## Create a Secondary Action

### Procedure

1. Access **Secondary Actions**.

Datasheet ID:

---

Action ID:

Action Basis:

Name:

Description:

Action Type:




Condition Monitoring Type:

Interval:  
 Interval Units:

Nonrec...


Performance In...



Consolidated Actions (0)
**Secondary Actions (1)**


	STATUS	NAME	ACTION TYPE
<input type="checkbox"/>	(0)		
<input type="checkbox"/>	+	Secondary action	PROC

1 - 1 of 1 Results
← Page 1 of 1 →

- In the **Secondary Actions** section, select .  
 A blank datasheet appears for the new secondary action record.

ABDP\_action2 Source: ASM  

---

Datasheet ID: 

---

Action ID:

Action Basis:

Name:

Description:

Action Type:

Condition Monitoring Type:

Interval:  Interval Units:



Nonrec...

Performance In...  Performance In...

---

Consolidated Actions (0) Secondary Actions (0)

[All Secondary Actions](#) > [New Action](#) >

Datasheet ID:  

---

Action ID:

Action Basis:


Name:  
  
This field is required

Description:

Action Type:

Condition Monitoring Type:

Interval:  Interval Units:

3. As needed, enter values in the [available fields](#).
4. Select .  
The record is saved.

## Delete a Secondary Action

### Procedure

1. Access [Secondary Actions](#).

Datasheet ID:  
Action

Action ID:  
~ ~ PUMP-A01

Action Basis:  
RCM/FMEA Recommendation

Name:  
FMEA Action2

Description:  
Text area

Action Type:  
Condition-Based Maintenance (Predictive) (CM)

Condition Monitoring Type:  
Periodic

Interval:  
8




Interval Units:  
Months

Nonrec...

Performance In...  
Numeric in


Performance In...  
▼

Consolidated Actions (0)      **Secondary Actions (1)**

<input type="checkbox"/> (0)	STATUS	NAME	ACTION TYPE
<input type="checkbox"/>	+	Secondary action	PROC

1 - 1 of 1 Results      ← Page 1 of 1 →

- In the **Secondary Actions** section, select the row containing the secondary action that you want to delete, and then select .  
The secondary action is deleted.

# Chapter 13

---

## System Strategies

### Topics:

- [About System Strategies](#)
- [Access a System Strategy](#)
- [Create a System Strategy](#)
- [Add an Existing Asset Strategy to a System Strategy](#)
- [Use Bulk State Management in a System Strategy](#)
- [View Action Changes in System Strategy](#)
- [Remove an Asset Strategy from a System Strategy](#)



## About System Strategies

A System Strategy is a collection of Asset Strategies. The first step in building a System Strategy is to create a System Strategy record. You can then further define the System Strategy by adding one or more Asset Strategies.

## Access a System Strategy

### Procedure

1. Access the [ASM Overview](#) page.
2. Select the **System Strategies** tab.  
A list of system strategies appears.

The screenshot shows the 'Asset Strategy Management' page. At the top, there is a navigation bar with 'Asset: Home' and an 'Import' button. Below the navigation bar are three summary cards: '149 Asset Strategies', '43 System Strategies', and '61 Templates'. The 'System Strategies' card is highlighted. Below the cards is a table with the following data:

STRATEGY ID	ASO ANALYSIS ID	LAST UPDATED DATE
ACA-01		03/10/2010 23:53:23
ASI System strategy		03/13/2009 23:37:07
ASO Large System 1	ASO Large System 1 Optimization	11/02/2016 14:23:09
ASO Large System 2		05/19/2011 01:18:03
ASO Large System 3		05/19/2011 00:54:27
ASO Medium System		05/18/2011 00:27:16
ASO Simulation on System	ASO Simulation on System Strategy	02/15/2015 20:24:49
ASO System 1		06/29/2010 10:47:55
ASO System 2		06/29/2010 11:16:39
ASO System 3		06/29/2010 10:32:46
ASO System 4		06/29/2010 10:36:16

3. In the **Strategy ID** column, select the link for the system strategy that you want to view.

The **Strategy Summary** workspace for the selected system strategy appears, displaying the **Summary** section. The following [charts](#) appear:

- Risk Profile
- Cost Projection



Summary

Details

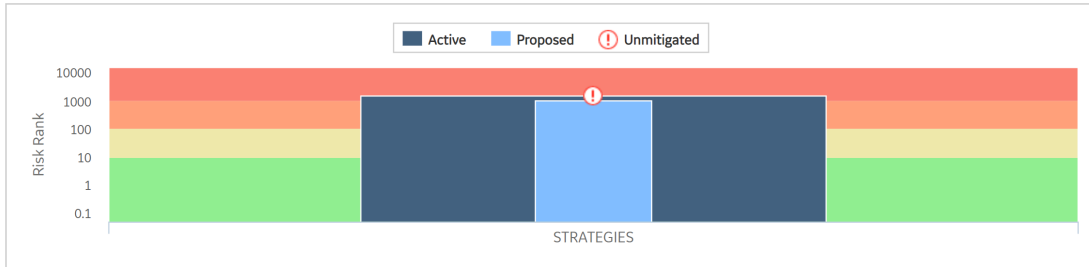
Manage

Implement

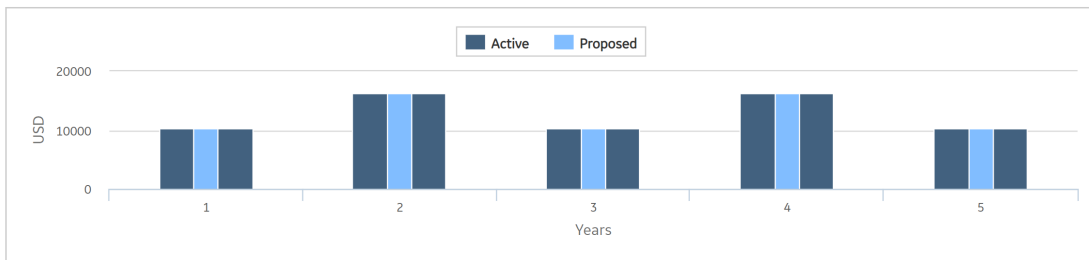
RISK PROFILE

Total Risk ↓ 33%

Risk Rank  Financial Risk




COST PROJECTION



## Create a System Strategy

### Procedure

1. Access the [ASM Overview](#) page.
2. In the page, select , and then select **Create System Strategy**. The new strategy appears in a new tab, displaying the **Details** section. The following image shows the **Details** section for a system strategy.



Summary

Details

Manage

Implement

Datasheet ID:

System Strategy

Site: Roanoke, VA

System ID:


ASO Simulation on System

Risk Analysis Type:

Simulation

Description:

This System has only one Asset and optimized at System level

- As needed, enter values in the available fields for a [system](#) strategy.
- Select .  
The strategy is created.

## Add an Existing Asset Strategy to a System Strategy



### Before You Begin

This topic assumes that you have pre-existing asset strategies to add to your system strategy.

### Procedure

- [Access the system strategy](#) to which you want to add an asset strategy.
- Select the **Manage** tab.  
The **Manage** workspace appears.

ASO Simulation on System ⋮  
Last modified by Sumathi Iyappan on 02/15/2015 20:24:49

Summary	Details	Manage	Implement
		+ 	02 Action Changes ⊕00   ⊖00   ✎02 <i>Not Assigned</i> <span style="float: right;">∨</span>
<input type="checkbox"/> (0)	STRATEGY	CHANGES	STATUS      LAST UPDATED
<input type="checkbox"/> >	<a href="#">Simulation on Asset 1</a>	2 Changes	Modified      2/15/2015

- Select .  
The **Add Existing Asset Strategies** window appears.

Add Existing Asset Strategies

<input type="checkbox"/>	STRATEGY	DESCRIPTION	ASSET NAME	ASSET TYPE	STATE
<input type="checkbox"/>	PMP-3121 SPARE ...	This strategy was a...	PMP-3121 SPARE ...	Centrifugal Pump	Draft
<input type="checkbox"/>	Asset strategy link...	Asset strategy link...	~ Agitator ~ 10003...	Equipment	Active
<input type="checkbox"/>	Asset strategy link...	Asset strategy link...	01-B02-1 ~ Compr...	Functional Location	Active
<input type="checkbox"/>	Strategy ASI- asset...	Strategy with AHI d...	PMP-8276 SPENT ...	Centrifugal Pump	Active
<input type="checkbox"/>	AirCooler-AHI		HX-1514 AIR COOL...	Air Cooled Heat Ex...	Active
<input type="checkbox"/>	Asset strategy (ASI...	Asset strategy (ASI...	PMP-3830 DEETHA...	Centrifugal Pump	Active
<input type="checkbox"/>	AcidBlowDownPu...	Asset Strategy wit...	PMP-8281 ACID BL...	Centrifugal Pump	Modified
<input type="checkbox"/>	3.3.1 SP2 asset str...	3.3.1 SP2 asset str...	19-02900 INJECTI...	Piping Circuit	Active
<input type="checkbox"/>	PMP 8053 Strategy		PMP-8053 MTBE-M...	Centrifugal Pump	Draft

Rows per page 50  200 500 1 - 84 of 84 Results <  >

[Cancel](#)

- For each strategy that you want to add, select the check box, and then select **Add**. The asset strategy is added to the system strategy.

**Note:** The maximum number of asset strategies that can be added to a system strategy is 500.

## Use Bulk State Management in a System Strategy

### Procedure

In the **Manage** workspace, you can use mass state management to update the state of all the Asset Strategies contained within your system strategy at the same time.

- [Access the system strategy](#) for which you want to use bulk state management.
- Select the **Manage** tab.  
The **Manage** workspace appears.

ASO Simulation on System  
Last modified by Sumathi lyappan on 02/15/2015 20:24:49

Summary	Details	Manage	Implement
		+	02 Action Changes +00   -00   02 Draft Not Assigned
<input checked="" type="checkbox"/> (2)	STRATEGY	CHANGES	STATUS
<input checked="" type="checkbox"/>	> ~ ~ QA-PIPING-001		Draft
<input checked="" type="checkbox"/>	> ~ ~ QA-PIPING-003		Draft
<input type="checkbox"/>	> MRD-ROA-REFN-RF098 ~ FCC GAS CON A		Active
<input type="checkbox"/>	> MS-FLOC-2 ~ P-101 Location		Active
<input type="checkbox"/>	> Simulation on Asset 1	2 Changes	Modified 2/15/2015

- In the **State** drop-down list, select the appropriate choice for the state of the strategy, and then select **Done**.

A message appears, confirming that the operation has been performed.

**Note:** To move the strategy through the rest of the state assignments, repeat step 3.

## View Action Changes in System Strategy

### About This Task

This topic describes how to view the changes for all the actions in the system strategy.

### Procedure

- Access the system strategy for which you want to view the action changes.
- Select the **Manage** tab.  
The **Manage** workspace appears.

ASO Simulation on System  
Last modified by Sumathi lyappan on 02/15/2015 20:24:49

Summary	Details	Manage	Implement
		+	02 Action Changes +00   -00   02 Not Assigned
<input type="checkbox"/> (0)	STRATEGY	CHANGES	STATUS LAST UPDATED
<input type="checkbox"/>	> Simulation on Asset 1	2 Changes	Modified 2/15/2015

- Select **Action Changes** to view the changes made to the actions in the system strategy.  
The **Action Changes** window appears.

## Action Changes

STRATEGY	CHANGES	STATUS	LAST UPDATED
Simulation on Asset 1	2 Changes	Modified	2/15/2015

Changed Field	Previous Value	New Value	Basis For Revision
<b>Mitigating Condition Based Actions</b> Modified			
ROI	949	1,006	
Relevance	660	702.939990234375	
Max Unmitigated Risk	700	702.939990234375	
Detection Probability		100	
Duration		0	
Duration Units		Days	
<b>Mitigating Time Based Actions</b> Modified			
ROI	0	335	
Relevance	0	702.939990234375	

Rows per page 50  200 500 1 - 1 of 1 Results <  >

[Cancel](#)

## Remove an Asset Strategy from a System Strategy

This topic describes how to remove an asset strategy from a system strategy.

### Before You Begin

Only the owner of the strategy has the system permissions to delete a strategy.

### Procedure


1. [Access the system strategy](#) from which you want to remove an asset strategy.
2. Select the **Manage** tab.  
The **Manage** workspace appears, displaying a list of available strategies.

ASO Simulation on System ⋮

Last modified by Sumathi Iyappan on 02/15/2015 20:24:49

Summary	Details	Manage	Implement
02 Action Changes			
<input type="checkbox"/> (0)			Not Assigned <input type="checkbox"/>
STRATEGY	CHANGES	STATUS	LAST UPDATED
<input type="checkbox"/> > Simulation on Asset 1	2 Changes	Modified	2/15/2015

3. For each strategy that you want to remove, select the check box.

In the workspace,  is enabled.

4. Select .

A window appears, asking you to confirm that you want to remove the selected strategies from the parent strategy.

5. Select **OK**.

The selected strategy is removed.

# Chapter

# 14

---

## Implement Actions from System Strategy

### Topics:

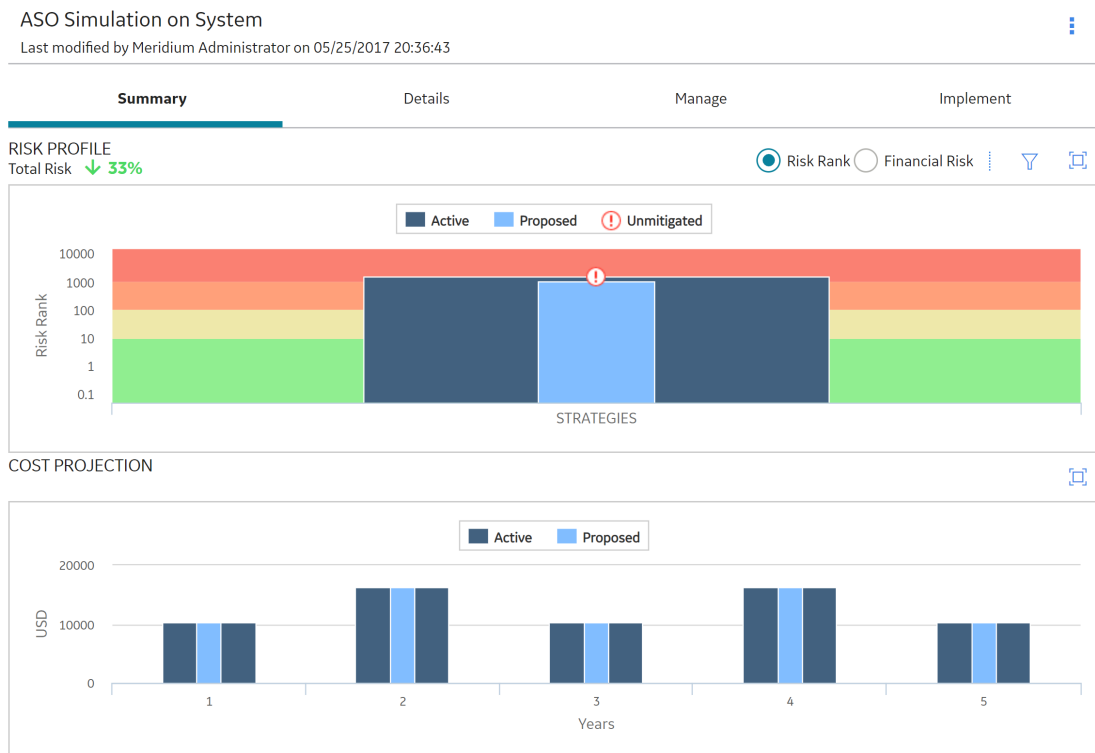
- [Access the Implement Workspace](#)
- [Link Existing Tasks to Actions](#)
- [Link Existing Health Indicators](#)
- [Link Existing Proof Test Task](#)
- [Create New Measurement Location or Lubrication Requirement Records](#)
- [Link a Policy Instance](#)
- [Link EAM Work Request](#)
- [Create EAM Maintenance Plan Record](#)
- [Apply Updates to Implemented Actions](#)
- [Unlink Implementations](#)
- [Send Approved Actions to an ASI Package](#)
- [Delete a System Strategy](#)






# Access the Implement Workspace

## Procedure

1. Access the [ASM Overview](#) page.
2. Select the **System Strategies** tab.  
The **System Strategies** section appears, displaying a list of available system strategies.
3. Select the system strategy whose actions you want to implement.  
The **Strategy Summary** workspace for the selected system strategy appears.



4. Select the **Implement** tab.  
The **Implement** workspace appears.

Summary		Details			Manage		Implement		
							   Implement ▾		
<input type="checkbox"/> (0)	ACTION NAME	INTERVAL	INTE...	STRATEGY	MOD...	IMPLEMENTATION	EAM ...	LAST ...	PACKAGE NAME
<input type="checkbox"/>	Action 1			MRD-ROA-REFN...					
<input type="checkbox"/>	Action 1			MS-FLOC-2 ~ P...					
<input type="checkbox"/>	Mitigating Condi...	1	Years	Simulation on As...					
<input type="checkbox"/>	Mitigating Time ...	1	Years	Simulation on As...					

## Link Existing Tasks to Actions

### About This Task

In the **Implement** workspace, you can link calibration and inspection tasks when you implement the actions.

**Note:** To link an existing record, it cannot already be linked to another action.

### Procedure


1. Access the **Implement** workspace.
2. In the **Implement** workspace, select the check box in the row containing the action you want to implement.  
The action is highlighted.
3. Select the **Implement** drop-down menu, and then select either **Calibration Task** or **Inspection Task**.  
A window appears with the **Link Existing** option selected, displaying a list of records you can link.

Implement Inspection Task
✕

---

Link Existing
 Create New

---



TASK ID	TASK DESCRIPTION	TASK TYPE
work order	work order creation	

---

1 - 1 of 1 Results
← Page 1 of 1 →

---

Cancel
Implement

- Select the row containing the calibration or inspection task that you want to link, and then select **Implement**.

A message appears, confirming that the task has been linked successfully.

### Results

- The calibration or inspection task is linked to the action.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the calibration or inspection task appears.

## Link Existing Health Indicators

### About This Task

In the **Implement** workspace, you can link health indicator records when you implement the actions. Implementing an action with a health indicator creates a record in Asset Health Management that stores information used to determine the health of an asset.


### Procedure

- Access the **Implement** workspace.
- In the **Implement** workspace, select the check box in the row containing the action which you want to implement with a health indicator record.

**Note:** You can only link one health indicator record per action.

3. Select the **Implement** drop-down menu, and then select **Health Indicator**. The **Link To Existing Health Indicator** window appears, displaying a list of health indicators.

### Link To Existing Health Indicator ✕



NAME	DESCRIPTION
test 1	test 1
Proto type	Proto type
test 2	test 2
Proto type character	Proto type char
asset 2	asset 2
HG1	KPI
Numeric1	ML
Character1	ML
AHI record without source	AHI record with
AHI1	Num
AHI1	cha

1 - 100 of 210 Results ← Page 1 of 3 →

Cancel Implement

4. Select the row containing the record that you want to link, and then select **Implement**. A message appears, confirming that the health indicator has been linked successfully.

### Results

- The health indicator is linked to the action.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the health indicator record appears.
- The **Health Status** indicator appears on the **Strategy Details** page of the strategy whose action was implemented as health indicator. The indicator shows the overall status for the asset based on the

health indicator diagnostics. The icons used to represent the health statuses are the same used in [Asset Health Manager](#).

## Link Existing Proof Test Task

### About This Task

In the **Implement** workspace, you can link proof test task when you implement the actions.

**Note:** To link an existing record, it cannot already be linked to another action.

### Procedure

1. Access the **Implement** workspace.
2. In the **Implement** workspace, select the check box in the row containing the action you want to implement via the proof test task link. The action is highlighted.
3. Select the **Implement** drop-down menu, and then select **Proof Test Task**. The **Implement As Proof Test** window appears displaying a list of records you can link.

Implement As Proof Test

Link Existing  Create New

TASK ID	TASK DESCRIPTION	TASK TYPE
Filter	Filter	Filter
FMEA Action2		PROOF TEST

Rows per page: 50  200 500

1 - 1 of 1 Results

4. Select **Link Existing**, and then select the action to which you want to link the proof test task.
5. Select **Implement**. A message appears, confirming that the task has been linked successfully.

### Results

- A proof test task is linked to the action.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the proof test task appears.

## Create New Measurement Location or Lubrication Requirement Records

### About This Task

In the **Implement** workspace, you can create corresponding measurement location and lubrication requirement records to implement an action. After you create the records, you can link to them from the **Implement** workspace.


**Procedure**

1. Access the **Implement** workspace.
2. In the **Implement** workspace, select the check box in the row containing the action you want to implement via a new Measurement Location or Lubrication Requirement record. The action is highlighted.
3. Select the **Implement** drop-down menu, and then select **Measurement Location** or **Lubrication Requirement**.  
The **Implement Lubrication Requirement** window or the **Implement Measurement Location** window appears, depending on which type of implementation you selected, displaying a list of measurement location or lubrication requirement records from Rounds to which you could link the action.

### Implement Lubrication Requirement ✕

Link Existing       Create New (Select a Lubrication Requirement Template)

---



DESCRIPTION	LR TYPE
Drain & Refill	Change Out
Inspect	Check Off
Lube Req Tracking	Tracking
Fill Oil Reservoir	Check Off
PM Lubrication within Food Processing Areas	Change Out
QA LR TEMPL	Check Off
	Check Off
	Tracking
for testing LR Capacity UOM	Check Off

1 - 13 of 13 Results      ← Page 1 of 1 →

4. Select the **Create New** option.  
A grid appears, displaying a list of available [template types](#).

5. Select the template type you want to use, and then select **Implement**.  
A message appears, confirming that the action has been implemented successfully.

### Results

- A new measurement location or lubrication requirement is created.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the measurement location or lubrication requirement appears.

## Link a Policy Instance

### About This Task

In the **Implement** workspace, you can link a policy instance to implement an action. [Policy instances](#) are records that identify specific aspects you might want to monitor for an asset, in this case in accordance with actions which have already been identified for the associated asset strategy.

### Procedure

1. [Access the \*\*Implement\*\* workspace.](#)
2. In the **Implement** workspace, select the check box in the row containing the action to which you want to link a policy instance.  
The action is highlighted.

**Note:** An action may not be linked to more than one policy instance.

3. Select the **Implement** drop-down menu, and then select **Policy Instance**.  
The **Implement Policy Instance** window appears.

## Implement Policy Instance



ID	NAME
UC3TestCase	UC3_Health_Index
Instance 1	QueryNode
Instance 1	Validate Constant node
Instance 1	ValidatePolicyDoesNotTrigger
Instance 1	ValidateCaseNode
InstanceValidate	ValidateFilterCount,Sum,AverageNodes
Instance with points	ValidatePointNode
Instance with linked EQandREC	PolicyWithLinkedRecommendation
Instance 1	Policy with health indicator
Instance 1	Non-trigger policy
Instance 1	logic path test

1 - 100 of 3755 Results      ← Page 1 of 38 →

Cancel

Implement

4. Select the policy instance with which you want to implement an action, and then select **Implement**. A message appears, confirming that the action has been implemented successfully.

### Results

- The policy instance is linked to the action.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the policy instance record appears.



# Link EAM Work Request

## About This Task

In the **Implement** workspace, you can link EAM work request when you implement the action.

## Procedure

1. Access the **Implement** workspace.
2. In the **Implement** workspace, select the check box in the row containing the action you want to implement with an EAM work request.  
The actions are highlighted.
3. Select the **Implement** drop-down menu, and then select **EAM Work Request**.  
The **Implement as EAM Work Request** window appears.

Implement as EAM Work Request ✕

---

This implementation method is intended to request the execution of the selection Actions via an EAM Work Request.

Selecting 'Send' will create a work request in your EAM system for each selected Action. Each work request will be generated via a new Recommendation associated with the current asset.

Cancel

Send

4. Select **Send**.  
A message appears, confirming that the work request has been linked successfully.

## Results

- The EAM work request is linked to the action.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the EAM work request record appears.

# Create EAM Maintenance Plan Record

## About This Task

In the **Implement** workspace, you can create corresponding EAM maintenance plan record to implement an action.

## Procedure

1. Access the **Implement** workspace.
2. In the **Implement** workspace, select the check box in the row containing the action you want to implement via a new EAM maintenance plan record. The actions are highlighted.
3. Select the **Implement** drop-down menu, and then select **EAM Maintenance Plan**. The **Implement as EAM Maintenance Plan** window appears.

Implement as EAM Maintenance Plan

Link Existing  Create New

This implementation method is intended to request the creation, update or deletion of EAM Maintenance Plans for the selected Actions. Selecting 'Implement' will create a General Recommendation with an associated export (csv) file containing the details of each selected Action.

Create EAM Work Request  
Selecting this option will create a single work request in your EAM system that will contain a link to the General Recommendation created above

Cancel Implement

4. Select **Create New**, and then select **Implement**. A message appears, confirming that the action has been implemented.

## Results

- The new EAM plan is created.
- In the **Implement** workspace, in the **Implementation** column of the action you implemented, a hyperlink to the EAM maintenance plan appears.

# Apply Updates to Implemented Actions

## Before You Begin

- [Modify action\(s\) as necessary](#) for the asset strategy that is linked to your system strategy. When you do so, the state assignment for the strategy is changed to Modified.

## Procedure

1. [Approve the strategy](#) whose related actions you modified. The strategy is changed back to the Active state.
2. Access the **Implement** workspace.

id	action name	frequency	action no.	start date	period	implementation	generation	update	rollback date
1	Action D	1	Months	- 2000-01-01 00:00	Calibration	Action D	Approved		
2	Action C	200	Days	- 2000-01-01 00:00					
3	Action B	1	Years	- 2000-01-01 00:00					
4	Action E	12	Months	- 2000-01-01 00:00					
5	Action F	12	Months	- 2000-01-01 00:00					
6	Action A	1	Years	- 2000-01-01 00:00					

- In the **Implement** workspace, select the actions that you modified and you want to update with their implementations, and then select . The updates are applied to the implemented actions. If any updates were unsuccessful, the **Errors** window appears, which contains a list of the unsuccessful updates.

## Unlink Implementations

### About This Task

These steps describes how to unlink implementations.

### Procedure

- Access the **Implement** workspace.
- Next to each implementation that you want to unlink, select the check box. The selected implementations are highlighted.

id	action name	frequency	action no.	start date	period	implementation	generation	update	rollback date
1	Action D	1	Months	- 2000-01-01 00:00	Calibration	Action D	Approved		
2	Action C	200	Days	- 2000-01-01 00:00					
3	Action B	1	Years	- 2000-01-01 00:00					
4	Action E	12	Months	- 2000-01-01 00:00					
5	Action F	12	Months	- 2000-01-01 00:00					
6	Action A	1	Years	- 2000-01-01 00:00					

- Select . A confirmation window appears.

### Unlink Actions

---

Are you sure you want to unlink actions?

Yes

No

- Select **Yes**. The selected implementations are unlinked.

## Send Approved Actions to an ASI Package

### Procedure

- Access the **Implement** workspace.
- In the **Implement** workspace, select the check box in the rows containing the implemented actions that you want to send to ASI, and then select .

The Send to ASI Package window appears, displaying a list of existing implementation packages that match the CMMS system of the Asset. By default, the **Link Existing** option is selected.

Send to ASI Package

Link Existing  Create New

🔍

ID

Single Cycle Package in PRF

Strategy Plan in PRF

pkgWithAllIWMI

Package for Multi-counter plan

Strategy Import from 2/2/2017 11:27:59 PM

ASI asdfasdf

100 Plan Package - c9ce154a-e173-479b-955e-b72f4a3e68b8 (1404 total)

100 Plan Package - 354e70fb-f7ba-451b-b8cd-a9a934b6d2b9 (2204 total)

100 Plan Package - 0c1500c-453e-40b4-86bc-0c0c25a341e7 (1100 total)

1 - 100 of 858 Results ← Page 1 of 9 →

Cancel Send

**Note:**


- The maximum amount of records that you can select for one implementation is 250.
  - The button will be enabled only if one of the following conditions are satisfied:
    - The Asset is an equipment or a functional location.
    - The Asset has a CMMS system.
3. If you want to send the implemented actions to an existing ASI package, select the package to which you want to link them, and then select **Send**. Or, if you want to create a new ASI package and link the implemented actions to an existing ASI package, select **Create New**, then enter values in the available fields as needed, and then select **Send**.
- A message appears, confirming that your items have been sent to ASI.



## Delete a System Strategy

**Procedure**

1. Access the [ASM Overview](#) page.
2. Select the **System Strategies** tab.

The **System Strategies** section appears, displaying a list of system strategies.

3. Select the row containing the strategy that you want to delete, and then, in the section, select . The **Confirm Delete** dialog appears, asking you to confirm that you want to delete the strategy.
4. Select **Yes**.  
The strategy is deleted.

**Note:** You can also delete a strategy using the delete button () under  option while viewing the strategy that you want to delete.

# Chapter 15

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## Admin

### Topics:

- [Asset Strategy Management](#)
- [Access ASM Admin Settings](#)
- [Risk and Action Card Preferences](#)
- [ASM Preferences](#)

# Asset Strategy Management

This topic provides a list of help topics related to the Asset Strategy Management application settings.

## Access ASM Admin Settings

### About This Task

**Note:** To access the **ASM Admin** page, the ASM license must be active and you must be a member of the **MI ASM Administrator** group or a Super User.

### Procedure

In the module navigation menu, select **Admin > Application Settings > Asset Strategy Management**. The **ASM Admin** page appears, displaying the **Risk Card** workspace by default.

ASM Admin

Risk Card  
Configure the items displayed on the risk card

Restore Default Save

**Card Settings**

Graphic Elements	Display
Status Icon	<input checked="" type="checkbox"/>
Risk Bar	<input checked="" type="checkbox"/>

Fields	Display	Sortable	
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Action Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Miti...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Miti...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Risk Rank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

**Risk Card Preview**

Name Of ...

Strategy Mitiga...:

Strategy Mitiga...:

Source:

**Mitigated Risk Card Preview**

Name Of ...

Action Mitigate...:

Strategy Mitiga...:

Strategy Mitiga...:

Source:

## Risk and Action Card Preferences

This topic provides a list of help topics related to the Risk and Action card application settings.

### Display and Sort Preferences on Risk and Action Cards

#### Procedure

1. [Access the Action or Risk Card Admin section.](#)

2. Configure display settings for graphic elements and fields and enable sorting by fields using the **Display** and **Sortable** check boxes. The check boxes make the following results on the risk or action cards:

- **Display:** when checked, that element or field will appear on the card.
- **Sortable:** when checked, you will be able to sort by that field in ASM.

Changes made to the display preferences are reflected in the **Card Preview** section. There are two card previews each for the Risks and Actions tabs: one displaying the risk or action and the other displaying the mitigating action or mitigated risk in the context of the risk or action. Some fields that you add, namely those beginning with Action Mitigated, are only applicable to the mitigated/mitigating card (For example, Action Mitigated Financial Risk and Action Mitigated Risk Rank).

ASM Admin
◀

**Action Card**

Configure the items displayed on the action card

Restore Default
Save

Risk Card

**Action Card**

Action Mappings

ASM Preferences

**Card Settings**

Graphic Elements	Display
Status Icon	<input checked="" type="checkbox"/>
Mandatory Icon	<input checked="" type="checkbox"/>
Consolidated Icon	<input checked="" type="checkbox"/>
Risk Bar	<input checked="" type="checkbox"/>

Fields	Display	Sortable	
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Interval	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Interval Units	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Cost	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

**Action Card Preview**

Interval:

Interval Units:

Cost:

Source:

**Mitigating Action Card Preview**

Interval:

Interval Units:

Cost:

Source:

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ASM Admin

- Risk Card
- Action Card
- Action Mappings
- ASM Preferences

### Risk Card

Configure the items displayed on the risk card

Restore Default
Save

#### Card Settings

Graphic Elements	Display
Status Icon	<input checked="" type="checkbox"/>
Risk Bar	<input checked="" type="checkbox"/>

Fields	Display	Sortable	
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Action Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Miti...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Miti...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Risk Rank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

#### Risk Card Preview

**Name Of ...**

Strategy Mitiga... :

Strategy Mitiga... :

Source:

#### Mitigated Risk Card Preview

**Name Of ...**

Action Mitigate... :

Strategy Mitiga... :

Strategy Mitiga... :

Source:

3. Select

Your changes are saved, and the modified values will now reflect on the **Risks and Actions** workspace for asset strategies.

## Add Card Fields

### Procedure

1. [Access the Action or Risk Card Admin section.](#)
2. Select , and then select the field that you want to add from the drop-down list of available fields. The new field is added to your list of fields for the card and in the **Card Preview** section, fields for which the **Display** check box is filled will appear on the card.

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ASM Admin ◀

**Risk Card**

Configure the items displayed on the risk card

[Restore Default](#) [Save](#)

**Card Settings**

**Graphic Elements**      **Display**

Status Icon

Risk Bar

**Fields**      **Display**      **Sortable**      **+**

Fields	Display	Sortable	
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Action Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Risk Rank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

**Risk Card Preview**

Name Of ...

Strategy Mitiga... :

Strategy Mitiga... :

Source:

**Mitigated Risk Card Preview**

Name Of ...

Action Mitigate... :

Strategy Mitiga... :

Strategy Mitiga... :

Source:

**Note:** You can rearrange the order in which the fields will display on the card by selecting and then dragging and dropping in another position.

3. Select .  
Your changes are saved.

## Remove Card Fields

### Procedure

1. [Access the Action or Risk Card Admin section.](#)
2. On the list of fields, on the row containing the field that you want to delete, select .  
The field is removed from the card.
3. Select .  
Your changes are saved.

## Restore the Default Card Settings

### Procedure

1. [Access the Action or Risk Card Admin section.](#)
2. In the left pane, select either the **Risk Card** or the **Action Card** tab, depending on the card for which you want to restore default settings.  
Depending on your selection, the **Risk Card** or the **Action Card** workspace appears.
3. Select **Restore Default**.  
The default settings are restored for the card.

ASM Admin

Risk Card

Restore Default Save

Configure the items displayed on the risk card

Card Settings

Graphic Elements Display

Status Icon

Risk Bar

Fields Display Sortable +

Fields	Display	Sortable	
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Action Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Strategy Mitig...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Risk Rank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Risk Card Preview

Name Of ...

Strategy Mitiga... :

Strategy Mitiga... :

Source:

Mitigated Risk Card Preview

Name Of ...

Action Mitigate... :

Strategy Mitiga... :

Strategy Mitiga... :

Source:

4. Select **Save**.  
Your changes are saved.

## ASM Preferences

In the **ASM Preferences** section, you can hide the Baseline activate and Cancel operations from the **Strategy Details** workspace.

### Hide Baseline Activate Operation from the Strategy Details Workspace

#### Procedure

1. [Access the Admin section](#).
2. Select the **ASM Preferences** tab.  
The **ASM Preferences** workspace appears.

ASM Admin

ASM Preferences

Save

Risk Card

Action Card

Action Mappings

ASM Preferences

Suppress Baseline Operation

Suppress Cancel Operation

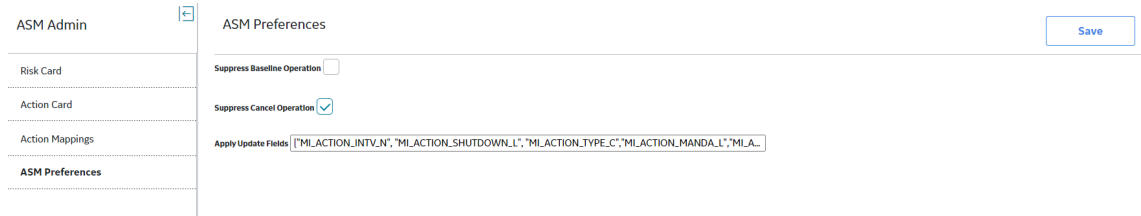
Apply Update Fields: ["ML\_ACTION\_INTV\_N","ML\_ACTION\_SHUTDOWN\_L","ML\_ACTION\_TYPE\_C","ML\_ACTION\_MANDA\_L","ML\_A...

3. Select the **Suppress Baseline Operation** check box, and then select **Save**.  
Your preference is saved, and the Baseline activate operation is hidden from the **Strategy Details** workspace.

## Hide Cancel Operation from the Strategy Details Workspace

### Procedure

1. [Access the Admin section.](#)
2. Select the **ASM Preferences** tab.  
The **ASM Preferences** workspace appears.



The screenshot shows the 'ASM Preferences' workspace. On the left is a navigation menu with 'ASM Admin' selected. The main area contains several settings: 'Risk Card', 'Action Card', 'Action Mappings', and 'ASM Preferences'. Under 'ASM Preferences', there are two checkboxes: 'Suppress Baseline Operation' (unchecked) and 'Suppress Cancel Operation' (checked). Below these is a text field for 'Apply Update Fields' containing a list of field names: '["ML\_ACTION\_INTV\_N", "ML\_ACTION\_SHUTDOWN\_L", "ML\_ACTION\_TYPE\_C", "ML\_ACTION\_MANDA\_L", "MLA...']'. A 'Save' button is located in the top right corner.

3. Select the **Suppress Cancel Operation** check box, and then select **Save**.  
Your preference is saved, and the Cancel operation is hidden from the **Strategy Details** workspace.

## Apply Update Fields for Actions

This function allows Administrators to control which Action fields will trigger an Apply Update for Actions upon Strategy Approval.

### Procedure

1. [Access the Admin section.](#)
2. Select the **ASM Preferences** tab.  
The **ASM Preferences** workspace appears.
3. Select the required fields in the desired format, and then select **Save**.

**Note:** If you update an action for a field that is in **Apply Update Fields** and re-activate the strategy, then the **Requires Update** flag displays under the **Implements action** screen. If you update the action for a field that is not specified under **Apply Update Fields** and re-activate the strategy, the **Requires Update** flag does not display.

# Chapter 16

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## Data Loader

### Topics:

- [About the Asset Strategy Management \(ASM\) Data Loaders](#)
- [About the Asset Strategy Management \(ASM\) Data Loaders Requirements](#)
- [About the Asset Strategy Management \(ASM\) Data Loaders Data Models](#)
- [About the Asset Strategy Management \(ASM\) Data Loaders General Loading Strategy](#)
- [About the Asset Strategy Management \(ASM\) Data Loaders Workbook Layout and Use](#)
- [About the Asset Strategy Management \(ASM\) Data Loaders Load Verification](#)

## About the Asset Strategy Management (ASM) Data Loaders

The Asset Strategy Management (ASM) and Asset Strategy Management (ASM) Templates Data Loaders serve the following purposes:

- Provides functional equivalence with Meridium APM V3.x to enable existing or new Asset Strategies and Templates to be imported into the ASM module for further development, analysis, or implementation.
- Provides customers with a more effective APM experience because the loaded content will be searchable and usable within the various APM modules.
- Enables the user to upload Asset Strategies for storage and to create templates in ASM that can be applied to one or more assets as a repeatable process, or to upload existing Asset Templates that can be applied to assets.

Following the data load, you can access the imported data, which will contain details such as when it was uploaded, and by whom it was created. You can open the imported strategies and templates in ASM and start using them in your workflows.

## About the Asset Strategy Management (ASM) Data Loaders Requirements

To use the Asset Strategy Management (ASM) Data Loader and the Asset Strategy Management (ASM) Templates Data Loader, your organization must have completed fully the deployment of the Asset Strategy module. The Asset Strategy Management (ASM) Data Loaders should only be used after the Asset Strategy module has been implemented and you have defined the appropriate Site References, Process Units (Functional Location records), and assets (Equipment records) for your organization.

### Risk Mapping

The Asset Strategy Management (ASM) Data Loaders rely on Risk Mapping families to ensure that fields on the ASM Strategy and related records are correctly populated with data, and that resulting risk values can be mapped to the Default Risk Matrix.

If you have added custom fields, you must ensure that mappings exist for those fields, or data may not be populated as expected following the data load.

### Security Settings

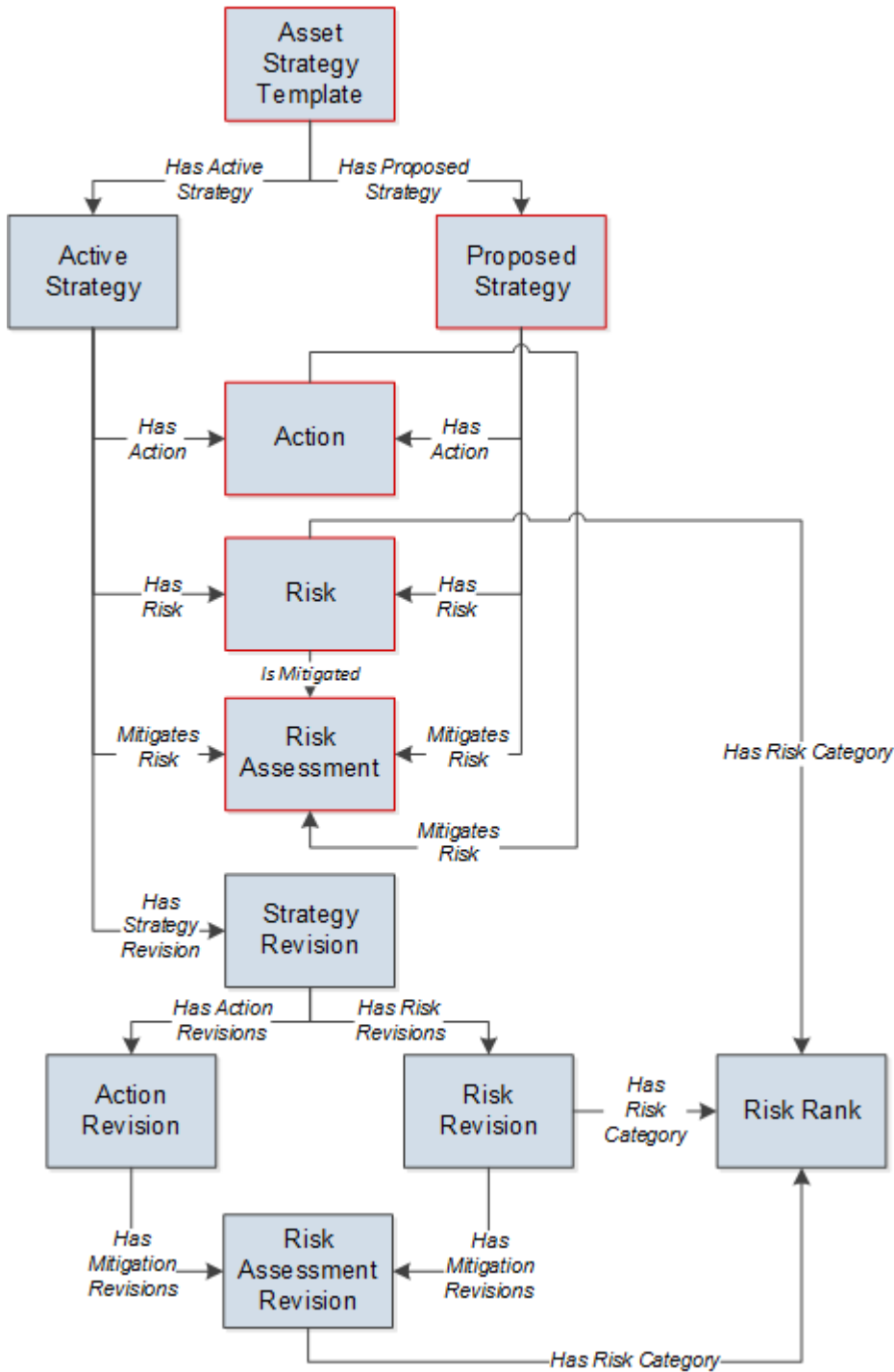
The Security User performing the data load operation must be associated with either the MI Data Loader User or MI Data Loader Admin Security Role, and must also be associated with the MI ASM Analyst Security Group or a Security Role that is associated with this Security Group.

## About the Asset Strategy Management (ASM) Data Loaders Data Models

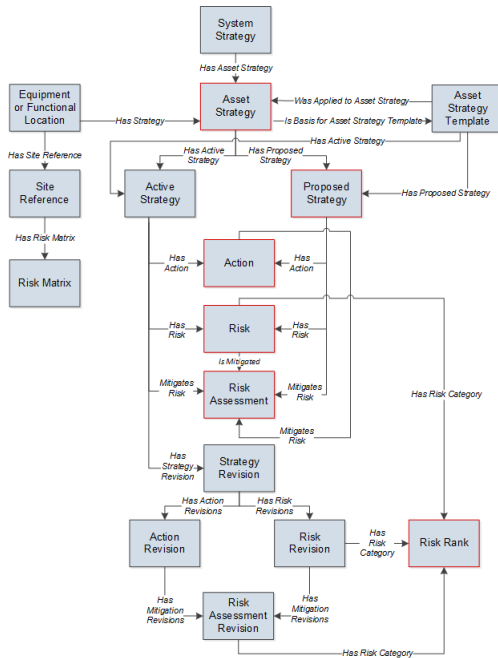
The data for ASM strategies and templates is loaded from Excel workbooks, each containing multiple worksheets. The ASM Template worksheets include Templates, Actions, Risks, and Mitigations, and the ASM Strategy worksheets include Strategies, Actions, Risks, and Mitigations. These elements are highlighted with red boxes around the relevant functional areas from the two ASM data models shown

below. Elements shown without a red border are data model elements that will not be loaded by the data loader.

### Asset Strategy Management (ASM) Templates Data Loader



## Asset Strategy Management (ASM) Data Loader



## About the Asset Strategy Management (ASM) Data Loaders General Loading Strategy

### Best Practices

When importing data using the Asset Strategy Management (ASM) Data Loaders, you must use the following best practices:

- Do not try to create and update a component in the same Excel workbook.
- Do not include anything in the Excel workbook that you do not want imported into the dataset. If you include fields that are blank, they will import into the database as blank fields. If you do not want a specific field imported because it would overwrite a value in an existing field, remove that column from the worksheet.

### Load Sequence

The data loader jobs must load in a specific sequence in order to successfully populate fields, create records, and link them to the predecessor and/or successor records. This section documents the order of steps that you must perform for the strategy and template data loaders to work correctly.

### Asset Strategy Management (ASM) Data Loader

For all strategies, the strategy data loader will:

- Create the ASM Strategy and link it to the defined asset through the Has Strategy relationship.
- Create Actions: One or many that are linked to the Asset Strategy through the Has Actions relationship.
- Create Risks: One or many that are linked to a mitigating Action through the Has Actions relationship.



- Create Mitigations: One or many Mitigated Risk Assessments that are linked to one or more Risks through the Is Mitigated relationship.
- Create Secondary Actions: One or many that are linked to the action.

### Asset Strategy Management (ASM) Templates Data Loader

For all templates, the template data loader will:

- Create the ASM Template without any defined asset.
- Create Actions: One or many that are linked to the template through the Has Actions relationship.
- Create Risks: One or many that are linked to a mitigating Action through the Has Actions relationship.
- Create Mitigation: One or many Mitigated Risk Assessments that are linked to one or more Risks through the Is Mitigated relationship.
- Create Secondary Actions: One or many that are linked to the action.

**Note:** Verify that all data was successfully uploaded and all relationships have been created or preserved.

## About the Asset Strategy Management (ASM) Data Loaders Workbook Layout and Use

In order to import data using the Asset Strategy Management (ASM) Data Loaders, APM provides Excel workbooks, **Asset Strategy Management (ASM).xlsx** and **Asset Strategy Management (ASM) Templates.xlsx**, which support baseline ASM in APM. These workbooks must be used to perform the data load. You can modify the Excel workbook to include custom fields used by your organization. The following tables list the worksheets that are included in the workbooks and then the fields in the corresponding worksheets for both the Strategy and Template Data Loaders.

### Asset Strategy Management (ASM) Data Loader

Worksheet	Description
Strategies	This worksheet is used to specify new or existing strategies to which Action, Risks, and Mitigations will be linked.
Actions	This worksheet is used to specify Action records that will be updated or created and linked to assets.
Risks	This worksheet is used to specify Risk records that will be updated or created and linked to assets.
Mitigations	This worksheet is used to define Mitigation records that will be linked to Analyses.
Secondary Actions	This worksheet is used to define Secondary Actions records that will be linked to the action.

## Strategies Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Strategy ID	MI_ASTSTRAT_ID_C	Character (255)	This field is the master reference column for each of the four tabs in the data loader spreadsheet.
Asset ID	ASSET_ID_CHR	Character (255)	This field allows the user to enter values to search for an asset.
Asset Family ID	ASSET_FAMILY_ID	Character (15)	This field allows the user to enter values to search for an asset.
Asset ID Field	ASSET_ID_FIELD	Character (255)	This field allows the user to enter values to search for an asset.
CMMS ID	ASSET_CMMS_ID	Character (255)	This field allows the user to enter values to search for an asset.
CMMS Value	ASSET_CMMS_VALUE	Character (255)	This field allows the user to enter values to search for an asset.
Strategy Notes	MI_ASTSTRAT_NOTES_T	Text	None
Risk Analysis Type	MI_ASTSTRAT_RISK_ANAL_TYP E_C	Character (255)	None
Quantitative Result	MI_ASTSTRAT_QUANT_RESUL_ T	Text	None
Plan Length	MI_ASTSTRAT_PLAN_LENGTH_ N	Numeric	None

## Actions Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Strategy ID	MI_ASTSTRAT_ID_C	Character (255)	This field is the master reference column for each of the four tabs in the data loader spreadsheet.
Action ID	MI_ACTION_ID_C	Character (255)	This field is used to look up existing Actions, and if none are found, a new Action will be created.
Name	MI_ACTION_SHORT_DESC_C	Character (255)	None

Field Caption	Field ID	Data Type (Length)	Comments
Description	MI_ACTION_DESCRIPTION_T	Text	None
Basis	MI_ACTION_BASIS_C	Character (255)	None
Type	MI_ACTION_TYPE_C	Character (255)	None
Condition Monitoring Type	MI_ACTION_CM_TYPE_C	Character (50)	None
Interval	MI_ACTION_INTV_N	Numeric	None
Interval Unit	MI_ACTION_INTV_UNITS_C	Character (50)	None
Resource Cost	MI_ACTION_RESOURCE_COST_N	Numeric	None
Shutdown Required	MI_ACTION_SHUTDOWN_L	Boolean	None

### Risks Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Strategy ID	MI_ASTSTRAT_ID_C	Character (255)	This field is used as the master reference column for each of the four tabs in the data loader spreadsheet.
Risk ID	MI_RISKASSE_ID_C	Numeric	This field is used to look up existing Risks, and if none are found a new Risk will be created.
(ENVIRONMENT) Consequence	ENVIRONMENT MI_CONSE_N	Numeric	None
(ENVIRONMENT) Probability	ENVIRONMENT MI_PROB_N	Numeric	None
(ENVIRONMENT) Protection Level	ENVIRONMENT MI_PROT_N	Numeric	None
(FINANCIAL) Consequence	FINANCIAL MI_CONSE_N	Numeric	None
(FINANCIAL) Maintenance Cost	FINANCIAL MI_RISK_MAIN_COST_N	Numeric	None
(FINANCIAL) Probability	FINANCIAL MI_PROB_N	Numeric	None
(FINANCIAL) Production Loss	FINANCIAL MI_RISK_PROD_LOSS_N	Numeric	None
(FINANCIAL) Protection level	FINANCIAL MI_PROT_N	Numeric	None
(OPERATIONS) Consequence	OPERATIONS MI_CONSE_N	Numeric	None
(OPERATIONS) Probability	OPERATIONS MI_PROB_N	Numeric	None

Field Caption	Field ID	Data Type (Length)	Comments
(OPERATIONS) Protection Level	OPERATIONS MI_PROT_N	Numeric	None
(SAFETY) Consequence	SAFETY MI_CONSE_N	Numeric	None
(SAFETY) Probability	SAFETY MI_PROB_N	Numeric	None
(SAFETY) Protection Level	SAFETY MI_PROT_N	Numeric	None
Basis for Assessment	MI_RISKASSE_BASIS_T	Text	None
Condition	MI_FAILRISK_CODE3_C	Character (50)	None
Description	MI_FAILRISK_DESC_T	Text	None
Driving Unmitigated Risk Alias	MI_RISKASSE_DRIV_RISK_ALIAS_C	Character (50)	None
Estimated Repair Time	MI_FAILRISK_EST_REP_TIME_N	Numeric	None
Failure Cause	MI_FAILRISK_CODE4_C	Character (50)	None
Failure Mode	MI_FAILRISK_CODE1_C	Character (255)	None
Failure Without Replacement	MI_FAILRISK_FAIL_WITH_REPL_F	Boolean	None
Is Active	MI_FAILRISK_IS_ACTIV_F	Boolean	None
Is Latent	MI_FAILRISK_IS_LATEN_F	Boolean	None
Last Failure	MI_FAILRISK_LAST_FAILU_D	Date	None
Maintainable Item	MI_FAILRISK_CODE2_C	Character (50)	None
Name	MI_RISKASSE_NAME_C	Character (515)	None
Number of Subcomponents	MI_FAILRISK_NUMB_OF_SUBC_N	Numeric	None
Percentage of PF Interval to Wait	MI_FAILRISK_PER_OF_PF_INT_N	Numeric	None
PF Interval	MI_FAILRISK_PF_INTER_N	Character (50)	None
PF Interval Units	MI_FAILRISK_PF_INTER_UNITS_C	Character (50)	None
Planned Correction Cost	MI_FAILRISK_PLAN_CORR_COST_N	Numeric	None

Field Caption	Field ID	Data Type (Length)	Comments
Planned Correction Duration	MI_FAILRISK_PLAN_CORR_DURA_N	Numeric	None
Repair Immediately	MI_FAILRISK_REPAIR_IMMEDIATE_F	Boolean	None
Risk Basis	MI_RISKASSE_RISK_BASIS_C	Character (255)	None
Unmitigated Risk Alias	MI_RISKASSE_RISK_ALIAS_C	Character (50)	None
Wear Pattern	MI_FAILRISK_WEAR_PATTERN_C	Character (50)	None

### Mitigations Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Strategy ID	MI_ASTSTRAT_ID_C	Character (255)	This field is used as the master reference column for each of the four tabs in the data loader spreadsheet.
Risk ID	MI_RISKASSE_ID_C	Character (265)	This field is used to look up existing Risks to which the Mitigations will be linked.
Action ID	MI_ACTION_ID_C	Character (265)	This field is used to lookup existing Actions to which the Mitigations will be linked.
(ENVIRONMENT) Consequence	ENVIRONMENT MI_CONSEQUENCE_N	Numeric	None
(ENVIRONMENT) Probability	ENVIRONMENT MI_PROBABILITY_N	Numeric	None
(ENVIRONMENT) Protection Level	ENVIRONMENT MI_PROTECTION_N	Numeric	None
(FINANCIAL) Consequence	FINANCIAL MI_CONSEQUENCE_N	Numeric	None
(FINANCIAL) Maintenance Cost	FINANCIAL MI_RISK_MAINTENANCE_COST_N	Numeric	None
(FINANCIAL) Probability	FINANCIAL MI_PROBABILITY_N	Numeric	None
(FINANCIAL) Production Loss	FINANCIAL MI_RISK_PRODUCTION_LOSS_N	Numeric	None
(FINANCIAL) Protection level	FINANCIAL MI_PROTECTION_N	Numeric	None
(OPERATIONS) Consequence	OPERATIONS MI_CONSEQUENCE_N	Numeric	None
(OPERATIONS) Probability	OPERATIONS MI_PROBABILITY_N	Numeric	None

Field Caption	Field ID	Data Type (Length)	Comments
(OPERATIONS) Protection Level	OPERATIONS MI_PROT_N	Numeric	None
(SAFETY) Consequence	SAFETY MI_CONSE_N	Numeric	None
(SAFETY) Probability	SAFETY MI_PROB_N	Numeric	None
(SAFETY) Protection Level	SAFETY MI_PROT_N	Numeric	None
Basis for Assessment	MI_RISKASSE_BASIS_T	Text	None

### Secondary Actions Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Strategy ID	MI_ASTSTRAT_ID_C	Character (255)	This field is used as the master reference column for each of the four tabs in the data loader spreadsheet.
Primary Action ID	PRIMARY_ACTION_ID	Character (255)	None
Secondary Action ID	MI_ACTION_ID_C	Character (255)	None
Name	MI_ACTION_SHORT_DESC_C	Character (255)	None
Description	MI_ACTION_DESCRIPTION_T	Character (255)	None
Basis	MI_ACTION_BASIS_C	Character (255)	None
Type	MI_ACTION_TYPE_C	Character (255)	None
Condition Monitoring Type	MI_ACTION_CM_TYPE_C	Character(50)	None
Interval	MI_ACTION_INTV_N	Numeric	None
Interval Units	MI_ACTION_INTV_UNITS_C	Character(50)	None
Resource Cost	MI_ACTION_RESOURCE_COST_N	Numeric	None
Shutdown Required	MI_ACTION_SHUTDOWN_L	Boolean	None

### Asset Strategy Management (ASM) Templates Data Loader

Worksheet	Description
Templates	This worksheet is used to specify new or existing templates to which Action, Risks, and Mitigations will be linked.
Actions	This worksheet is used to specify Action records that will be updated or created and linked to templates.

Worksheet	Description
Risks	This worksheet is used to specify Risk records that will be updated or created and linked to templates.
Mitigations	This worksheet is used to define Mitigation records that will be linked to Analyses.
Secondary Actions	This worksheet is used to define Secondary Actions records that will be linked to the action.

### Templates Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Template ID	MI_ASTSTRAT_ID_C	Character (255)	This field is the master reference column for each of the four tabs in the data loader spreadsheet.
Template Notes	MI_ASTSTRAT_NOTES_T	Text	None
Risk Matrix Name	TEMPLATE_RISK_MATRIX_NAME	Character (255)	None
Template Category	MI_ASTSTTMP_GEN_FIELD_1_C	Character (255)	None
Criticality	MI_ASTSTTMP_GEN_FIELD_2_C	Character (255)	None
Duty	MI_ASTSTTMP_GEN_FIELD_3_C	Character (255)	None
Service	MI_ASTSTTMP_GEN_FIELD_4_C	Character (255)	None

### Actions Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Template ID	MI_ASTSTRAT_ID_C	Character (255)	This field is the master reference column for each of the four tabs in the data loader spreadsheet.
Action ID	MI_ACTION_ID_C	Character (255)	This field is used to look up existing Actions, and if none are found, a new Action will be created.
Name	MI_ACTION_SHORT_DESC_C	Character (255)	None
Description	MI_ACTION_DESCRIPTION_T	Text	None
Basis	MI_ACTION_BASIS_C	Character (255)	None
Type	MI_ACTION_TYPE_C	Character (255)	None
Condition Monitoring Type	MI_ACTION_CM_TYPE_C	Character (50)	None

Field Caption	Field ID	Data Type (Length)	Comments
Interval	MI_ACTION_INTV_N	Numeric	None
Interval Unit	MI_ACTION_INTV_UNITS_C	Character (50)	None
Resource Cost	MI_ACTION_RESOURCE_COST_N	Numeric	None
Shutdown Required	MI_ACTION_SHUTDOWN_L	Boolean	None

## Risks Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Template ID	MI_ASTSTRAT_ID_C	Character (255)	This field is used as the master reference column for each of the four tabs in the data loader spreadsheet.
Risk ID	MI_RISKASSE_ID_C	Numeric	This field is used to look up existing Risks, and if none are found a new Risk will be created.
(ENVIRONMENT) Consequence	ENVIRONMENT MI_CONSE_N	Numeric	None
(ENVIRONMENT) Probability	ENVIRONMENT MI_PROB_N	Numeric	None
(ENVIRONMENT) Protection Level	ENVIRONMENT MI_PROT_N	Numeric	None
(FINANCIAL) Consequence	FINANCIAL MI_CONSE_N	Numeric	None
(FINANCIAL) Maintenance Cost	FINANCIAL MI_RISK_MAIN_COST_N	Numeric	None
(FINANCIAL) Probability	FINANCIAL MI_PROB_N	Numeric	None
(FINANCIAL) Production Loss	FINANCIAL MI_RISK_PROD_LOSS_N	Numeric	None
(FINANCIAL) Protection level	FINANCIAL MI_PROT_N	Numeric	None
(OPERATIONS) Consequence	OPERATIONS MI_CONSE_N	Numeric	None
(OPERATIONS) Probability	OPERATIONS MI_PROB_N	Numeric	None
(OPERATIONS) Protection Level	OPERATIONS MI_PROT_N	Numeric	None
(SAFETY) Consequence	SAFETY MI_CONSE_N	Numeric	None
(SAFETY) Probability	SAFETY MI_PROB_N	Numeric	None
(SAFETY) Protection Level	SAFETY MI_PROT_N	Numeric	None



Field Caption	Field ID	Data Type (Length)	Comments
Basis for Assessment	MI_RISKASSE_BASIS_T	Text	None
Condition	MI_FAILRISK_CODE3_C	Character (50)	None
Description	MI_FAILRISK_DESC_T	Text	None
Driving Unmitigated Risk Alias	MI_RISKASSE_DRIV_RISK_ALIAS_C	Character (50)	None
Estimated Repair Time	MI_FAILRISK_EST_REP_TIME_N	Numeric	None
Failure Cause	MI_FAILRISK_CODE4_C	Character (50)	None
Failure Mode	MI_FAILRISK_CODE1_C	Character (255)	None
Failure Without Replacement	MI_FAILRISK_FAIL_WITH_REPL_F	Boolean	None
Is Active	MI_FAILRISK_IS_ACTIV_F	Boolean	None
Is Latent	MI_FAILRISK_IS_LATEN_F	Boolean	None
Last Failure	MI_FAILRISK_LAST_FAILU_D	Date	None
Maintainable Item	MI_FAILRISK_CODE2_C	Character (50)	None
Name	MI_RISKASSE_NAME_C	Character (515)	None
Number of Subcomponents	MI_FAILRISK_NUMB_OF_SUBCOMPONENTS_N	Numeric	None
Percentage of PF Interval to Wait	MI_FAILRISK_PER_OF_PF_INTERVAL_N	Numeric	None
PF Interval	MI_FAILRISK_PF_INTER_N	Character (50)	None
PF Interval Units	MI_FAILRISK_PF_INTER_UNITS_C	Character (50)	None
Planned Correction Cost	MI_FAILRISK_PLAN_CORR_COST_N	Numeric	None
Planned Correction Duration	MI_FAILRISK_PLAN_CORR_DURATION_N	Numeric	None
Repair Immediately	MI_FAILRISK_REPAIR_IMMED_F	Boolean	None
Risk Basis	MI_RISKASSE_RISK_BASIS_C	Character (255)	None
Unmitigated Risk Alias	MI_RISKASSE_RISK_ALIAS_C	Character (50)	None
Wear Pattern	MI_FAILRISK_WEAR_PATTE_C	Character (50)	None

## Mitigations Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Template ID	MI_ASTSTRAT_ID_C	Numeric	This field is used as the master reference column for each of the four tabs in the data loader spreadsheet.
Risk ID	MI_RISKASSE_ID_C	Character (265)	This field is used to look up existing Risks to which the Mitigations will be linked.
Action ID	MI_ACTION_ID_C	Character (265)	This field is used to lookup existing Actions to which the Mitigations will be linked.
(ENVIRONMENT) Consequence	ENVIRONMENT MI_CONSE_N	Numeric	None
(ENVIRONMENT) Probability	ENVIRONMENT MI_PROB_N	Numeric	None
(ENVIRONMENT) Protection Level	ENVIRONMENT MI_PROT_N	Numeric	None
(FINANCIAL) Consequence	FINANCIAL MI_CONSE_N	Numeric	None
(FINANCIAL) Maintenance Cost	FINANCIAL MI_RISK_MAIN_COST_N	Numeric	None
(FINANCIAL) Probability	FINANCIAL MI_PROB_N	Numeric	None
(FINANCIAL) Production Loss	FINANCIAL MI_RISK_PROD_LOSS_N	Numeric	None
(FINANCIAL) Protection level	FINANCIAL MI_PROT_N	Numeric	None
(OPERATIONS) Consequence	OPERATIONS MI_CONSE_N	Numeric	None
(OPERATIONS) Probability	OPERATIONS MI_PROB_N	Numeric	None
(OPERATIONS) Protection Level	OPERATIONS MI_PROT_N	Numeric	None
(SAFETY) Consequence	SAFETY MI_CONSE_N	Numeric	None
(SAFETY) Probability	SAFETY MI_PROB_N	Numeric	None
(SAFETY) Protection Level	SAFETY MI_PROT_N	Numeric	None
Basis for Assessment	MI_RISKASSE_BASIS_T	Text	None

## Secondary Actions Worksheet

Field Caption	Field ID	Data Type (Length)	Comments
Template ID	MI_ASTSTRAT_ID_C	Character (255)	This field is used as the master reference column for each of the four tabs in the data loader spreadsheet.
Primary Action ID	PRIMARY_ACTION_ID	Character (255)	None
Secondary Action ID	MI_ACTION_ID_C	Character (255)	None
Name	MI_ACTION_SHORT_DESC_C	Character (255)	None
Description	MI_ACTION_DESCRIPTION_T	Character (255)	None
Basis	MI_ACTION_BASIS_C	Character (255)	None
Type	MI_ACTION_TYPE_C	Character (255)	None
Condition Monitoring Type	MI_ACTION_CM_TYPE_C	Character(50)	None
Interval	MI_ACTION_INTV_N	Numeric	None
Interval Units	MI_ACTION_INTV_UNITS_C	Character(50)	None
Resource Cost	MI_ACTION_RESOURCE_COST_N	Numeric	None
Shutdown Required	MI_ACTION_SHUTDOWN_L	Boolean	None

## About the Asset Strategy Management (ASM) Data Loaders Load Verification

### About This Task

A successful data import will have the same effect as creating a new Asset Strategy or Strategy Template in APM. Following a successful data load, if the data loader created a new strategy or template, it will appear in the **Asset Strategies** section or the **Templates** section on the **Strategy Management Overview** page.

A successful import can also be defined as an event in which partial data on a worksheet was loaded into APM, and where the user was given appropriate messaging that enabled him or her to identify and correct issues resulting from the import.

# Chapter 17

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## Deployment

### Topics:

- [Deployment and Upgrade](#)

## **Deployment and Upgrade**

Deployment and Upgrade content for various APM modules has been consolidated into a single document. For more information, refer to the module-specific information in the APM Module Deployment and Upgrade document.

# Chapter 18

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## Reference

### Topics:

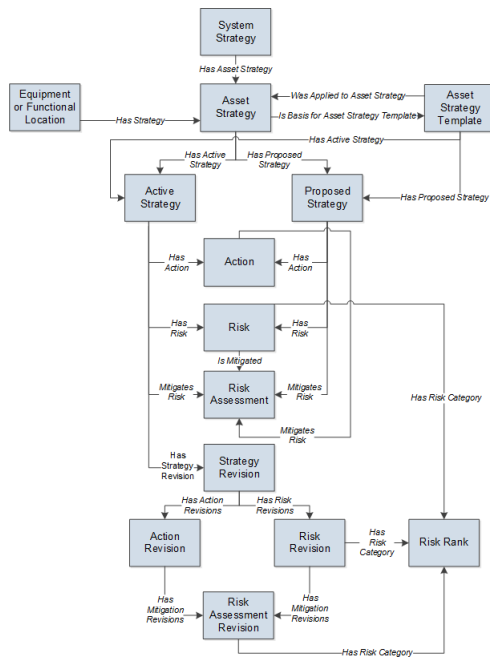
- [General Reference](#)
- [Family Field Descriptions](#)
- [Catalog Items](#)
- [Calculations](#)

# General Reference

## ASM Data Model

The following diagram illustrates how families are related to one another within the ASM data model. In the following image, boxes represent entity families, and arrows represent relationship families that are configured in the baseline database.

Several revision families exist in the ASM data model. Records are created in these families automatically when you modify certain information about an Asset Strategy.



## ASM Security Groups

The following table lists the baseline Security Groups available for users within this module, as well as the baseline Roles to which those Security Groups are assigned.

**Important:** Assigning a Security User to a Role grants that user the privileges associated with all of the Security Groups that are assigned to that Role. To avoid granting a Security User unintended privileges, before assigning a Security User to a Role, be sure to review all of the privileges associated with the Security Groups assigned to that Role. Also, be aware that additional Roles, as well as Security Groups assigned to existing Roles, can be added via Security Manager.

Security Group	Roles
MI ASM Administrator	MI Strategy Admin
MI ASM Analyst	MI Strategy Admin MI Strategy Power MI Strategy User MI Mechanical Integrity Power
MI ASM Reviewer	MI Strategy Admin MI Strategy Power MI Strategy User
MI ASM Viewer	MI APM Viewer MI Strategy Admin MI Strategy Power MI Strategy User

The baseline family-level privileges that exist for these Security Groups are summarized in the following table.

Family	MI ASM Analyst	MI ASM Administrator	MI ASM Reviewer	MI ASM Viewer
Entity Families				
Action	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Action Mapping	View	None	None	None
Active Strategy	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Analysis Link	View	View	View	View
Asset Criticality Analysis	View	View	View	View
Asset Criticality Analysis System	View	View	View	View
Asset Strategy	View, Update, Insert, Delete	View	View, Update	View
Calibration Task	View	None	View	None
Checkpoint Task	View, Update, Insert	View, Update, Insert	View, Update, Insert	View
Consequence	View	View, Update, Insert, Delete	View	View
Distribution	View, Update, Insert, Delete	View	View	View



Family	MI ASM Analyst	MI ASM Administrator	MI ASM Reviewer	MI ASM Viewer
Execution Mapping	View	None	None	None
Growth Model	View	View	View	View
Health Indicator	View, Update, Insert, Delete	None	View, Update	View
Health Indicator Mapping	View	View, Update, Insert, Delete	View	View
Hierarchy Item Child Definition	View	View, Update, Insert, Delete	View	View
Hierarchy Item Definition	View	View, Update, Insert, Delete	View	View
Implementation Package	View, Insert	None	None	None
Inspection Task	View	None	View	View
KPI	View	View	View	View
KPI Measurement	View	View	View	View
Measurement Location	View	View	View	View
Measurement Location Group	View, Update, Insert	None	None	None
Measurement Location Template	View	View	View	View
Operator Rounds Allowable Values	View	View	View	View
Probability	View	View, Update, Insert, Delete	View	View
Proposed Strategy	View, Update, Insert, Delete	View	View, Update	View
Protection Level	View	View	View	View
RBI Degradation Mechanisms	View, Update	None	None	None
RBI Recommendation	View, Update	None	None	None
RCM FMEA Asset	View, Update, Insert, Delete	View	View	View
Reading	View	View	View	View
Reliability Distribution	View	View	View	View
Reliability Growth	View	View	View	View

<b>Family</b>	<b>MI ASM Analyst</b>	<b>MI ASM Administrator</b>	<b>MI ASM Reviewer</b>	<b>MI ASM Viewer</b>
Risk Assessment	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Risk Category	View	View, Update, Insert, Delete	View	View
Risk Matrix	View	View, Update, Insert, Delete	View	View
Risk Rank	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Risk Threshold	View	Insert, View, Update, Delete	View	View
Site Reference	View	View	View	View
System Action	View, Update, Insert, Delete	View	View	View
System Action Mapping	View	View, Update, Insert, Delete	View	View
System Action Optimization	View, Update, Insert, Delete	View	View	View
System Action Result	View, Update, Insert, Delete	View	View	View
System Analysis	View, Update, Insert, Delete	View	View	View
System Element	View, Update, Insert, Delete	View	View	View
System Element Result	View, Update, Insert, Delete	View	View	View
System Global Event	View, Update, Insert, Delete	View	View	View
System Resource	View, Update, Insert, Delete	View	View	View
System Resource Result	View, Update, Insert, Delete	View	View	View
System Resource Usage	View, Update, Insert, Delete	View	View	View
System Risk Assessment	View, Update, Insert, Delete	View	View	View
System Scenario	View, Update, Insert, Delete	View	View	View

Family	MI ASM Analyst	MI ASM Administrator	MI ASM Reviewer	MI ASM Viewer
System Sensor	View, Update, Insert, Delete	View	View	View
System Strategy	View, Update, Insert, Delete	View	View, Update	View
Work Management Item Child Definition	View	None	None	None
Work Management Item Definition	View	None	None	None
Work Management Item Definition Configuration	View	None	None	None
Relationship Families				
Asset Criticality Analysis Has System	View	View	View	View
Has Action Driver	View, Update, Insert, Delete	None	None	None
Has Action Mapping	View	None	None	None
Has Action Revisions	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Actions	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Active Strategy	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Asset Strategy	View, Update, Insert, Delete	View	View	View
Has Associated Recommendation	View, Update, Insert, Delete	View	View	View
Has Associated Strategy	View, Update, Insert, Delete	View	View	View
Has Checkpoint	View	None	None	None
Has Child Hierarchy Item	View	View, Update, Insert, Delete	View	View
Has Child Work Management Item	View	None	None	None
Has Driving Recommendation	View, Update, Insert, Delete	View	View, Delete	View
Has Execution Mapping	View	None	None	None
Has Functional Location	View	None	View	None

<b>Family</b>	<b>MI ASM Analyst</b>	<b>MI ASM Administrator</b>	<b>MI ASM Reviewer</b>	<b>MI ASM Viewer</b>
Has Global Events	View, Update, Insert, Delete	View	View	View
Has Health Indicators	View, Update, Insert, Delete	View	View	View
Has Measurement Location Group	View, Update, Insert, Delete	None	None	None
Has Mitigated TTF Distribution	View, Update, Insert, Delete	View	View	View
Has Mitigation Revisions	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Planned Resource Usages	View, Update, Insert, Delete	View	View	View
Has Proposed Strategy	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Readings	View	View	View	View
Has Recommendations	View, Update, Insert, Delete	None	None	N/A
Has Reference Values	View	View, Update, Insert, Delete	View	View
Has Resource Usages	View, Update, Insert, Delete	View	View	View
Has Risk	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Risk Assessments	View, Update, Insert, Delete	View	View	View
Has Risk Category	View, Update, Insert, Delete	View, Update, Insert, Delete	View, Update, Insert, Delete	View
Has Risk Matrix	View	None	None	None
Has Risk Revisions	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has Root System	View, Update, Insert, Delete	View	View	View
Has Scenarios	View, Update, Insert, Delete	View	View	View
Has Strategy	View, Update, Insert, Delete	View	View	View

<b>Family</b>	<b>MI ASM Analyst</b>	<b>MI ASM Administrator</b>	<b>MI ASM Reviewer</b>	<b>MI ASM Viewer</b>
Has Strategy Revision	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Has System Actions	View, Update, Insert, Delete	View	View	View
Has System Elements	View, Update, Insert, Delete	View	View	View
Has System Optimization	View, Update, Insert, Delete	View	View	View
Has System Resources	View, Update, Insert, Delete	View	View	View
Has System Results	View, Update, Insert, Delete	View	View	View
Has System Risks	View, Update, Insert, Delete	View	View	View
Has System Strategy	View, Update, Insert, Delete	View	View	View
Has TTF Distribution	View, Update, Insert, Delete	View	View	View
Has TTR Distribution	View, Update, Insert, Delete	View	View	View
Has Unplanned Resource Usages	View, Update, Insert, Delete	View	View	View
Has Work Management Item	View, Update, Insert	None	None	None
Has Work Management Item Definition Configuration	View	None	None	None
Health Indicator Has Mapping	View, Update, Insert, Delete	View	View	View
Health Indicator Has Source	View, Update, Insert, Delete	View	View	View
Implements Action	View, Update, Insert	None	View	View
Implements Secondary Strategy	View	None	None	None
Implements Strategy	View, Insert	None	None	None
Is Based on RBI Degradation Mechanism	None	None	View, Delete	None

Family	MI ASM Analyst	MI ASM Administrator	MI ASM Reviewer	MI ASM Viewer
Is Based on RCM FMEA Failure Effect	View, Update, Insert, Delete	None	None	None
Is Basis for Asset Strategy Template	View, Update, Insert, Delete	View	View, Update	View
Is Mitigated	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Master Template Has Asset Strategy	View, Update, Insert, Delete	View	View, Update	View
Mitigates Risk	View, Update, Insert, Delete	View	View, Update, Insert, Delete	View
Safety Analysis Has Equipment	View	N/A	View	N/A
Was Applied to Asset Strategy	View, Update, Insert, Delete	View	View, Update	View
Was Promoted to ASM Element	View	None	View	View

### Associating a Strategy with a Specific Site

Some companies that use the GE Vernova software have facilities at multiple sites or locations around the world. Each site contains unique locations and equipment.

If needed, you can define these sites and associate equipment and locations with the site to which they belong. When you create an Asset Strategy record and link it to an Equipment or Functional Location record, the Site Reference field will be populated automatically with the Record ID of the Site Reference record to which the Equipment or Functional Location record is linked. To help streamline the strategy-building process, the GE Vernova system will allow you to add multiple Asset Strategies to System Strategies only if all the underlying equipment and locations belong to the same site.

## ASM System Code Tables

The following table provides a list of the System Code Tables that are used by ASM.

Table ID	Table Description	Function
MI_ACTION_TYPE	Action Type	Used to populate the Action Type list in Action records.
MI_PERFORMANCE_INTERVAL_UNITS	Performance Interval Units	Used to populate the Performance Interval Units list in Action records.
MI_TIME_UNITS	Time Units	Used to populate the Interval Units list in Action records.
SC_RECOM_RESOURCE	Recommended Resource	Used to populate the Recommended Resource list in Action records.

## ASM URLs

There are three URL routes associated with Asset Strategy Management: **/strategy/overview**, **/strategy/asm**, and **/strategy/admin**. The following table describes the various paths that build on the routes, and the elements that you can specify for each.

**Tip:** For more information, refer to the URLs section of the documentation.

### ASM URLs

Element	Description	Accepted Value(s)	Notes
<b>/strategy/overview</b> : Opens the <b>Asset Strategy Management</b> home page.			
<b>/strategy/asm/strategy/&lt;AssetEntityKey&gt;</b> : Displays the selected Strategy on the <b>Strategy Details</b> page.			
<b>&lt;AssetEntityKey&gt;</b>	Specifies the entity key of an asset whose associated strategy data you want to display.	The entity key of the asset.	The asset entity key must be present in the URL to display the correct page.
<b>/strategy/asm/strategy/&lt;AssetEntityKey&gt;/&lt;WorkspaceName&gt;</b> : Displays the selected strategy in the selected workspace.			
<b>&lt;WorkspaceName&gt;</b>	Specifies the workspace within which you want to open the query.	risks-actions	Displays the selected strategy in the <b>Risks and Actions</b> workspace on the <b>Strategy Details</b> page.
		analysis	Displays the selected strategy in the <b>Risk Analysis</b> workspace on the <b>Strategy Details</b> page.
		revisions	Displays the selected strategy in the <b>Revisions</b> workspace on the <b>Strategy Details</b> page.
		implement	Displays the selected strategy in the <b>Implement Actions</b> workspace on the <b>Strategy Details</b> page.
<b>/strategy/asm/template/&lt;TemplateEntityKey&gt;</b> : Displays the selected template on the <b>Strategy Details</b> page.			
<b>&lt;TemplateEntityKey&gt;</b>	Specifies the entity key of the template whose data you want to display.	The entity key of the template.	The template entity key must be present in the URL to display the correct page.
<b>/strategy/asm/template/&lt;TemplateEntityKey&gt;/&lt;TemplateWorkspaceName&gt;</b> : Displays the selected template in the selected workspace.			

Element	Description	Accepted Value(s)	Notes
<TemplateWorkspaceName>	Specifies the workspace within which you want to open the query.	controlled	Displays the selected template in the <b>Controlled Strategies</b> workspace on the <b>Strategy Details</b> template page.
		risks-actions	Displays the selected template in the <b>Risks and Actions</b> workspace on the <b>Strategy Details</b> template page.
		analysis	Displays the selected template in the <b>Risk Analysis</b> workspace on the <b>Strategy Details</b> template page.
		revisions	Displays the selected template in the <b>Revisions</b> workspace on the <b>Strategy Details</b> template page.
<b>/strategy/asm/system/&lt;SystemEntityKey&gt;</b> : Displays the selected system strategy on the <b>Summary</b> page.			
<SystemEntityKey>	Specifies the entity key of the system strategy whose data you want to display.	The entity key of the desired system strategy.	The system strategy entity key must be present in the URL to display the correct page.
<b>/strategy/asm/system/&lt;SystemEntityKey&gt;/&lt;SystemWorkspaceName&gt;</b> : Displays the selected system strategy in the selected workspace.			
<SystemWorkspaceName>	Specifies the workspace within which you want to open the query.	summary	Displays the selected system strategy in the <b>Summary</b> workspace.
		details	Displays the selected system strategy in the <b>Details</b> workspace.
		manage	Displays the selected system strategy in the <b>Manage</b> workspace.
		implement	Displays the selected system strategy in the <b>Implement</b> workspace.

### Example ASM Overview URLs

Example URL	Destination
/strategy/overview	The <b>ASM Overview</b> page.
/strategy/asm/strategy/5272011/risks-actions	The <b>Risks and Actions</b> workspace for the specified strategy.
strategy/asm/template/2112805	The <b>Strategy Details</b> page for the specified template.



## ASM Admin URLs

Element	Description
/strategy/admin	Opens <b>ASM Admin</b> with the first tab selected.
/strategy/admin/risk-card	Opens <b>ASM Admin</b> with the Risk Card tab selected.
/strategy/admin/action-card	Opens <b>ASM Admin</b> with the Action Card tab selected.

## About the ASM Data Structure

Asset Strategy Management (ASM) helps you create a strategy through a cycle of proposing changes that result in a plan that maintains a piece of equipment or location while posing the least possible risk and incurring the least possible cost. Because it might take months of research and discussion for a team to decide upon the proposed changes to an existing strategy, companies need a way to track proposed strategy changes separately from the current strategy. This tracking method allows management to review the cost difference and risk difference that would result from implementation of the proposed changes.

### Details

ASM facilitates the creation of multiple records to help you store information about a suggested strategy separately from information about the current strategy. The first step to creating any strategy is to create an Asset Strategy record. When you first save an Asset Strategy record, APM creates the following records, which are linked automatically to the Asset Strategy record:

- Proposed Strategy
- Active Strategy

These records serve as containers to identify the strategy using information such as the strategy ID and description. The records will be linked automatically to other records as you expand the strategy by adding Action records and Risk records and assessing the risk.

Ultimately, the Proposed Strategy record and the records to which it is linked represent the strategy that you propose the company implement. The Active Strategy record and the records to which it is linked represent the strategy that the company is currently implementing.

When you modify an Asset Strategy that is in the Active state, causing its state to change to Modified, APM captures your changes in the Proposed Strategy record and other records to which it is linked. When you later activate the strategy, the APM system copies the information from the Proposed Strategy record (and appropriate linked records) to the Active Strategy record (and appropriate linked records).

The Proposed Strategy record and its linked records are then identical to the Active Strategy record and its linked records until additional changes are made, which causes the cycle to continue.

ASM families can also participate in additional relationships with families in the Asset Criticality Analysis (ACA) data model, if an Asset Criticality Analysis System record is promoted from ACA to ASM.

## About the Risk and Cost Summary Graphs

Risk Profile and Cost Projection charts are on the **Strategy Details** page and the **Risk Analysis** page of every strategy in ASM. This topic explains each type of chart or graph and how best to interpret them and the results that they provide for your assets.

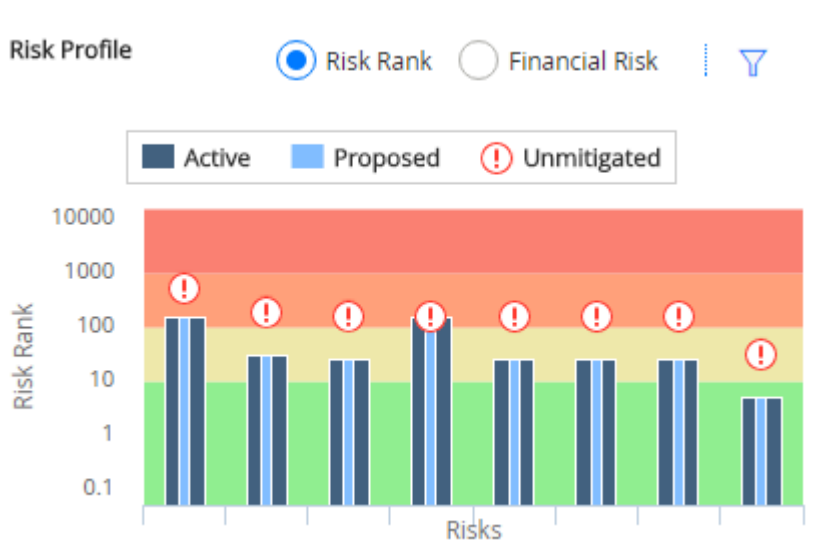
## Interpreting the Risk Profile Chart

The Risk Profile chart that appears on the **Strategy Details** page shows only the Active and Unmitigated risk ranks, whereas the **Risk Analysis** shows the Proposed risk rank data, allowing you to compare the Active Strategy and the Proposed Strategy.


**Note:** The Risk Profile chart does not display Risk records that have been removed from the Proposed Strategy.

### Risk Rank

The following image shows an example of a **Risk Profile** chart from the **Risk Analysis** section of a strategy, displaying the **Risk Rank** graph.



The **Risk Rank** graph contains the following elements:

- **Unmitigated Risk Rank:** The values for the unmitigated risk rank for each Risk in the Active Strategy are signified by .
- **Proposed Mitigated Risk Rank:** The values for the projected/proposed Strategy Mitigated Risk Rank value for each Risk that belongs to the Proposed Strategy are displayed on the light-blue vertical bar. As you make changes to the Asset Strategy, changing the strategy's state to Modified, those changes are reflected in the bars on the graph.
- **Active Risk Rank:** The Strategy Mitigated Risk Rank value for each Risk that belongs to the Active Strategy. These values are displayed on the dark-blue vertical bars on the graph.

**Note:** If a Proposed Strategy contains more Risks than the corresponding Active Strategy, the additional Risks are displayed on the Risk Profile chart. For any additional Risk, the unmitigated risk rank and the active risk rank will be the same until the strategy is activated.

### Financial Risk

You can use the radio buttons on the Risk Profile (Risk Profile) chart to toggle between the Risk Rank graph and the Financial Risk graph. As seen below, the Financial Risk graph shows the financial risk of each asset in the strategy.


The risks are shown on the x-axis, while the y-axis contains a monetary amount in US Dollars (USD) for the following scenarios, which appear in the following chart.

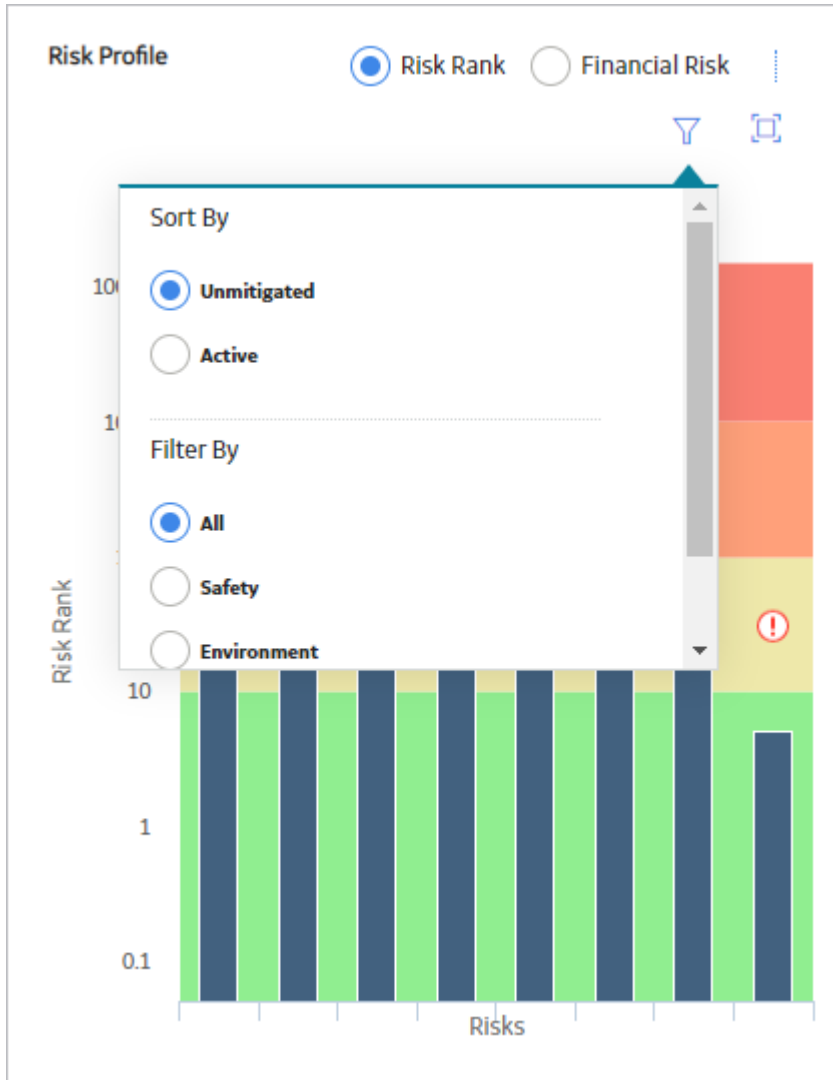
- **Unmitigated :** The risks presented with no changes.

- **Active** : The risks as they are in an active strategy.
- **Proposed** : The risks as proposed with changes to the strategy.



### Manipulating the Risk Rank and Financial Risk Charts

You can select  to expand the **Sort By** list, which has sort and filter parameters pertaining to the chart organization, as shown in the following image.



For example, consider the following graph, which shows the total mitigated risk, 150.1, for Lubricant Degradation across all risk categories.

### Risk Profile

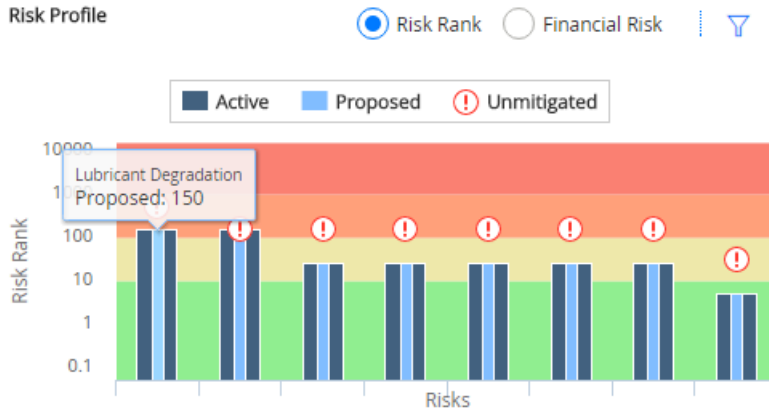
Risk Rank  Financial Risk ⌵



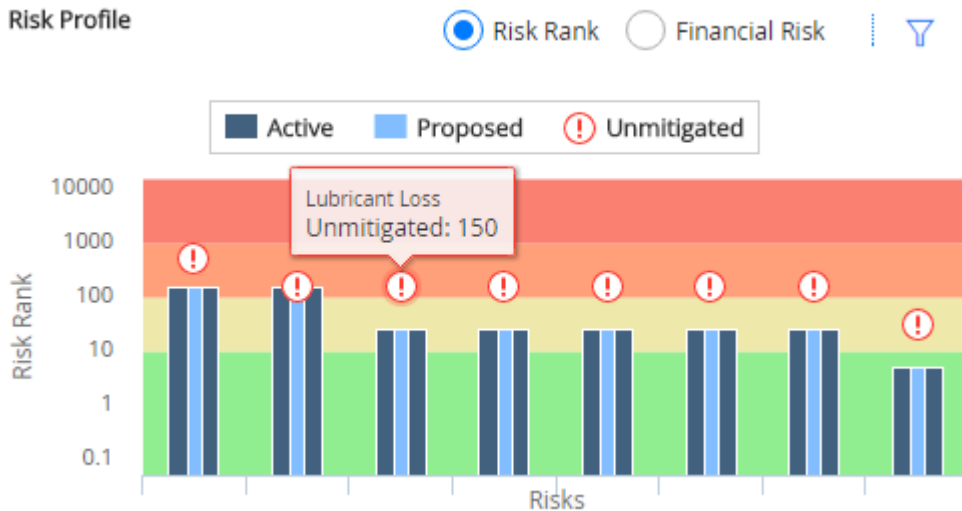
You would also see this value on the action card for Strategy Mitigated Risk Rank, accessed via the **Risks and Actions** page in your Asset Strategy.

<input type="checkbox"/> <b>Bearing Failure</b> Strategy Mitigated Risk Rank: 25.1 Strategy Mitigated Financial Risk: 25000 Source: ASM	
<input type="checkbox"/> <b>Impeller Wear</b> Strategy Mitigated Risk Rank: 25.1 Strategy Mitigated Financial Risk: 12500 Source: ASM	
<input type="checkbox"/> <b>Lubricant Degradation</b> <b>Strategy Mitigated Risk Rank: 150.1</b> Strategy Mitigated Financial Risk: 150000 Source: ASM	
<input type="checkbox"/> <b>Lubricant Loss</b> Strategy Mitigated Risk Rank: 25.55 Strategy Mitigated Financial Risk: 25000 Source: ASM	

If you filtered the **Risk Profile** section to display only risk values associated with the Operations risk category, it would look like the graph in the following image.



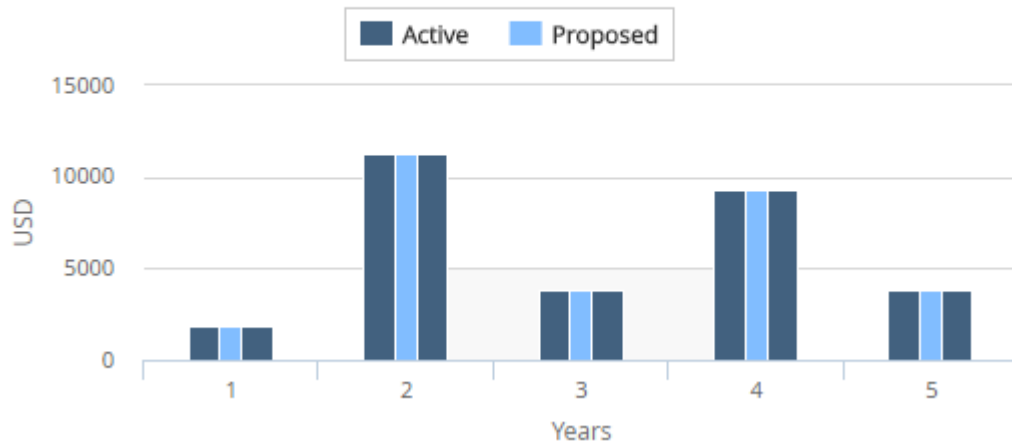
If you place the cursor over the line and the bars, you can choose to show the datapoint values on the graph to determine the exact risk rank values. The following image displays the example graph with the cursor hovering over the unmitigated risk bar for Lubricant Loss.



### Interpreting the Cost Projection Chart

The **Cost Projection** chart combines the Active and Proposed scenarios for the cost of risk mitigation over a set period of time as defined in the Plan Length field for the strategy record, with the increments of time being on the y-axis and a monetary amount in US Dollars (USD) on the x-axis. The **Strategy Details** page shows only the Active scenarios, while the **Risk Analysis** page compares both Active and Proposed. The Proposed scenarios appear as a light-blue vertical bar and the Active projections appear as a dark-blue vertical bar, as seen in the following chart.

## Cost Projection



### Maintaining Synchronization between the Asset Strategy and the Linked Analysis in ASO

When the optimization process is initiated from ASM, the contents of the Asset Strategy are transferred to the ASO module and the strategy in ASM is placed in Simulation mode. An Active scenario and a proposed scenario are then created in ASO.

The purpose of the Active scenario is to retain a visible record of the source strategy in ASO, for comparison purposes, while the proposed scenario provides a copy to be modeled under various proposed changes, the results of which will be shown in the simulation results, and in ASM.

When changes are made to the source strategy in ASM or to the proposed scenario in ASO, these are not immediately reflected in the linked module, i.e., synchronization is not automatic. The contents of the two modules are synchronized each time a Monte Carlo simulation is run.

When a simulation run is initiated, all scenarios (Active, Proposed and copies) are subjected to Monte Carlo simulation, for which valid simulation data will need to be added via the scenario grids. If insufficient or invalid data is preventing simulation from running the user is taken to each scenario in turn to complete the necessary data, with mandatory entries being indicated by a red icon and a count showing on the scenario tab in the left navigation pane.

When the simulation run has been completed, the contents of the proposed scenario are reflected in ASM, which is placed in a modified state. If initial synchronization, based on the proposed scenario in ASO, has not taken place, or the proposed scenario has been modified in ASO since the last simulation run, the user will not be permitted to make changes to the source strategy in ASM via Risk Analysis. Here the user will be notified in Risk Analysis and Review Strategy pages of the need to rerun the simulation and a hyperlink provided on these pages to initiate the Simulation run.

**Note:** The above restrictions on modifying a strategy in ASM do not apply to the Risk and Actions pages. Any additions or modifications to Actions and Risks will be captured in the Active and Proposed scenarios in ASO when the user selects **Run Simulation** in ASM. It is important that the hyperlink provided in the Risk Analysis and Review Strategy pages in ASM is used at this point since changes in ASM will not be captured if the Simulation is run from ASO. If the user chooses to run the Simulation from ASO the modified strategy will be overwritten with the simulation results from the proposed scenario before these changes had been captured and run in the ASO Analysis.

## About Revision Families in the ASM Data Model

The following revision families exist in the ASM data model:

- Strategy Revision
- Actions Revision
- Risks Revision
- Risk Assessment Revision

### Details

Records are created in these families when you modify certain information about an Asset Strategy. The following table explains when these records are created.

This action:	...Creates this record
Activating an Asset Strategy for the first time	Strategy Revision Actions Revision Risks Revision
Activating an Asset Strategy after modifying an Action record	Actions Revision
Activating an Asset Strategy after modifying a Risk record	Risks Revision
Activating an Asset Strategy after modifying a Risk Assessment record that is linked to an Action record  <b>Note:</b> If you activate an Asset Strategy after modifying a Risk Assessment record that is linked to a Risk record, a Risk Assessment Revision is not created. The Risk Revision record that is created as a result of the change is updated to contain the new risk rank, so a Risk Assessment Revision record is not needed.	Risk Assessment Revision
Activating a System Strategy if the underlying Asset Strategies have never been activated	Strategy Revision Actions Revision Risks Revision

## ASM State Configuration

ASM leverages State Configuration Roles, which you can assign to Security Users to manage who can transition strategies from one state to another.

### Details

In the baseline APM database, no State Configuration Roles are assigned to any state in the Asset Strategy State Configuration or the Asset Strategy Template State Configuration. If needed, an administrative user can assign State Configuration Roles to these states.

Throughout ASM, some options will be disabled based on whether or not the current user is assigned to the State Configuration Role that is required to perform that action. In other words, if an action will change the state of the strategy (e.g., adding an Action record) and the current user does not have permission to change the state, all options that would cause the state to change will be disabled. For example, consider the following scenario:

- An administrative user has specified that only members of the Asset Strategy Modifier State Configuration Role can transition an Active Strategy to the Modified state.



- Only members of the ASM Analyst Security Group are assigned to the Asset Strategy Modifier State Configuration Role.
- A user is logged in to APM as a member of only the ASM Reviewer Security Group.

In this case, when the ASM Reviewer opens, on the **Asset Strategy Actions** page, an Asset Strategy in the Pending Review state, the following options will be disabled on that page:

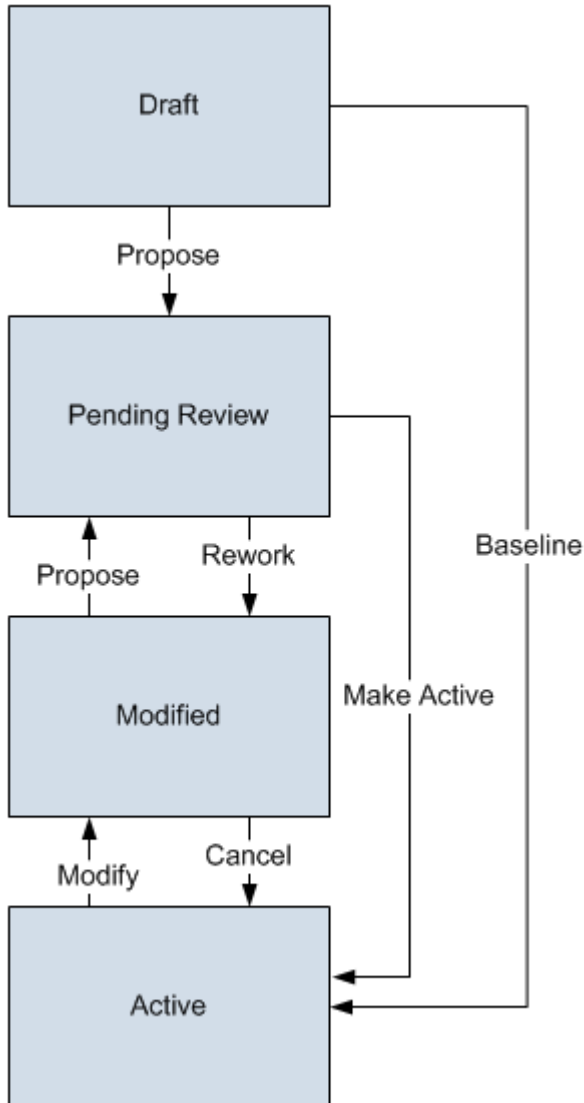
- The **Add Action** button.
- The **Remove Action** button.
- The **Undo Action** button.
- The **Assign New Risk** button.
- The **Assign Existing Risk** button.
- The Action datasheet.
- The Risk Assessment datasheet.

If no State Configuration Roles are specified for State Configuration, as in the baseline database, all options will be available to all users, and state changes will not be restricted. To take full advantage of the features in ASM, we recommend that you assign members of the ASM Security Groups to a corresponding State Configuration Role.

The following diagram shows the states and operations that exist in the baseline State Configuration for the Asset Strategy family. You can use this diagram to determine which operations will appear on the **Operations** menu when you are viewing an Asset Strategy. The **Operations** menu will display any operation to which the current Asset Strategy record can be transitioned from its current state.

**Note:** The information in this topic also applies to the configuration of Asset Strategy Template State Configuration.

## State Configuration



The Draft state is the initial state of all new Asset Strategy records.

- **Datasheet Configuration:** By default, states and operations will appear on the datasheet when you are viewing an Asset Strategy record in the Record Manager.
- **Reserved States and Operations:** By default, all states and operations displayed in the preceding diagram are reserved. This means that you cannot remove or modify any of these states or operations. You also cannot add operations whose successor state is set to Active.
- **State Configuration Roles.** By default, no State Configuration Roles are assigned to any state in the Asset Strategy State Configuration. As needed, you can assign State Configuration Roles to any state.

## ASM Site Filtering

### Asset Strategies

Site filtering is applied to asset strategies by one of the following methods:

- **Assigning a site using the Site control on the new asset strategy datasheet:** Using the **Site** control, you can choose a site from any of your available sites or designate the record as **Global**. Once the new strategy is saved, the site is locked for that strategy and cannot be changed. You can switch assets assigned to the strategy, but it must be an asset with the same site assignment.
- **Assigning an asset to the strategy:** All of the strategy's associated records are assigned to the same site as the asset. If an asset strategy is initially set to global, after you assign an asset to the strategy and save it, the site assignment it inherits from that asset is locked and cannot be changed. You can switch assets assigned to the strategy, but it must be an asset with the same site assignment.

## System Strategies

Site filtering is applied to system strategies by one of the following methods:

- **Assigning a site using the Site control on the new system datasheet:** Using the **Site** control, you can choose a site from any of your available sites or the global option. Once the site is set for the system, you will only be able to add asset strategies with that same site assignment.
- **Assigning an asset strategy with an assigned site to the system strategy:** If the system was initially created as global, and you assign an asset strategy to the system, the system will inherit the site of the asset strategy.

**Note:** All strategies in a system must be of the same site.

**Note:** When you create a new asset strategy within a system strategy, the new asset strategy inherits the site from the system strategy, and you are only able to add assets to the asset strategy that are of the same site.

## Asset Strategy Templates

The Strategy Template family is not enabled for site filtering. All records under a template are designated as **Global**. Templates can be applied as a copy to strategies from any site as long as their risk matrices match. The template then controls strategies from multiple sites as a master. If the template has controlled strategies from multiple sites, and you do not have permissions for all of those sites, you will not be able to activate the template.

## Examples

Consider an organization that has two sites, Site X and Site Y. Further, and then consider the following scenarios:

### Scenario 1: User assigned to both Site X and Site Y links assets to a strategy

Equipment 1 is assigned to Site X and Equipment 2 is assigned to Site Y. Asset Strategy 1 is assigned to Site Y. The user links Equipment 2 to Asset Strategy 1, because they share the same site (Site Y).

The user is unable to link Equipment 1 to Asset Strategy 1, because Equipment 1 would not appear in the list of available assets to link there due to site incompatibility. So, even though this multi-site user can view both Equipment 1 and Equipment 2, they cannot link an equipment to a strategy with an incompatible site assignment.

### Scenario 2: User assigned to both Site X and Site Y links an asset strategy to a system strategy

Asset Strategy 1 is assigned to Site Y and System Strategy 1 is a global record. The user links Asset Strategy 1 to System Strategy 1, which sets the site for System Strategy 1 as Site Y.

Now, only asset strategies with the Site Y assignment are able to added to System Strategy 1.

### Scenario 3: User assigned to Site X and Site Y applies a template to a strategy

Asset Strategy 1 is assigned to Site Y and Asset Strategy 2 is assigned to Site X. The user applies Template A to Asset Strategy 1 and to Asset Strategy 2, even though have separate site assignments.

## Family Field Descriptions

### Asset Strategy Records

The following table provides an alphabetical list and description of the fields that exist in the Asset Strategy family. The information in the table reflects the baseline state and behavior of these fields.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Description	Text	A description of the strategy.	The <b>Text Editor</b> window appears, on which you can enter a description.
Plan Length	Numeric	The number of years for which you want to calculate costs.	This value will be used to determine the number of datapoints (bars) on the Cost Projection graph.
Risk Analysis Type	List	A value that indicates whether the strategy results (shown in the graphs) are based on an ASO Analysis or not.	<p>The field will contain one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Simulation:</b> The strategy results are based on an ASO Analysis.</li> <li>• <b>Qualitative:</b> The strategy results are not based on an ASO Analysis.</li> </ul> <p>Note the following about the Risk Analysis Type field:</p> <ul style="list-style-type: none"> <li>• If the Asset Strategy has never been used to create an ASO Analysis and is not included in an ASO Analysis, the value will be set to Qualitative, and the field will be disabled. If you create an ASO Analysis from the Asset Strategy or include the Asset Strategy in an ASO Analysis by creating an analysis from a System Strategy that includes the Asset Strategy, the value will be changed automatically to Simulation.</li> <li>• If the Asset Strategy was used to create an ASO Analysis, the value will be set to Simulation, and the field will be enabled. If needed, you can change the value to Qualitative to update the strategy results so that they are no longer based on the ASO Analysis. If you change the value to Qualitative, the ASO Analysis will not be deleted or unlinked from the Asset Strategy.</li> <li>• If the Asset Strategy is included in an ASO Analysis but was not used to create the analysis, the value will be set to Simulation, and the field will be disabled. The value will be changed automatically to Qualitative only if the Risk Analysis Type in the System Strategy that includes the Asset Strategy is set to Qualitative.</li> </ul>
Strategy ID	Character	The ID of the strategy.	Does not have to be unique.

Field	Data Type	Description	Behavior and Usage
Strategy Notes	Text	Any additional information you want to provide about the strategy.	The <b>Text Editor</b> window appears, on which you can enter any notes.
Strategy Re-Evaluation Date	Date/Time	The date on which you want to reevaluate the strategy.	Cannot be before the Activated By date.

## Strategy Template Records

The following table provides an alphabetical list and description of the fields that exist in the Strategy Template family. The information in the table reflects the baseline state and behavior of these fields.

This family is not enabled for site filtering, which means that records in this family can be accessed by any user with the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Criticality	Character	The degree to which an asset is functionally or economically important.	This field is read-only and populated automatically.
Description	Text	A description of the Asset Strategy Template.	The <b>Text Editor</b> window appears, on which you can enter a description.
Duty	Character	The duty cycle context under which the asset is operating (for example, continuous or standby).	This field is read-only and the value is populated by the APT template data load.
Risk Matrix	List	A list that contains the Record IDs of the Risk Matrix records that exist in the database.	This field is disabled after the Asset Strategy Template record is saved.
Service	Character	The process and environmental conditions under which the asset is operating.	This field is read-only and the value is populated by the APT template data load.
Template Evaluation Date	Date/Time	The date on which you want to reevaluate the Asset Strategy Template.	Cannot be before the Activation date.
Template ID	Character	The ID of the Asset Strategy Template.	Template ID does not need to be unique.
Template Notes	Text	Any additional information you want to provide about the Asset Strategy Template.	The <b>Text Editor</b> window appears, on which you can enter any notes.

## System Strategy Records

The following table provides an alphabetical list and description of the fields that exist in the System Strategy family. The information in the table reflects the baseline state and behavior of these fields.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Description	Text	A description of the System Strategy.	The <b>Text Editor</b> window appears, on which you can enter your description.
Risk Analysis Type	List	A value that indicates whether the strategy results (shown in the graphs) are based on an ASO Analysis or not.	<p>The field will contain one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Simulation:</b> The strategy results are based on an ASO Analysis.</li> <li>• <b>Qualitative:</b> The strategy results are not based on an ASO Analysis.</li> </ul> <p>Note the following about the Risk Analysis Type field:</p> <ul style="list-style-type: none"> <li>• If the System Strategy has never been used to create an ASO Analysis and is not included in an ASO Analysis, the value will be set to Qualitative, and the field will be disabled. If you create an ASO Analysis from the System Strategy, the value will be changed automatically to Simulation.</li> <li>• If the System Strategy was used to create an ASO Analysis, the value will be set to Simulation, and the field will be enabled. If needed, you can change the value to Qualitative to update the strategy results so that they are no longer based on the ASO Analysis. If you change the value to Qualitative, the ASO Analysis will not be deleted or unlinked from the System Strategy.</li> <li>• If the System Strategy is included in an ASO Analysis but was not used to create the analysis, the value will be set to Simulation, and the field will be disabled.</li> </ul>
System ID	Character	The ID of the System Strategy.	Does not have to be unique. This field is required.

## Action Records

The following table provides an alphabetical list and description of the fields that exist in the Action family. The information in the table reflects the baseline state and behavior of these fields.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Action Basis	Text	The basis for the action being created.	This is not a required field.
Action ID	Character	The ID of the action.	Populated automatically from the name of the associated strategy when the action is created.

Field	Data Type	Description	Behavior and Usage
Action Type	List	The type of action you are creating.	Use the drop-down list to select the type of action.
Condition Monitoring Type	List	The type of condition monitoring for the action.	This field becomes active after the associated strategy is moved to an Active state.
Cost	Numeric	Cost to execute the action in US dollars.	Every time the action is performed, this amount is factored into the Annual Cost and Cost Projection graphs.
Cost Basis	Text	Description to justify cost of performing action.	Enter basis for the cost of carrying out the action each time.
Description	Text	A description for the action.	This is not a required field.
Existing Plan	Boolean	Is this action part of an existing plan?	Select the check box if the action is part of an existing plan.
Interval	Numeric	The number of the interval unit corresponding to how often the action should be performed.	This value corresponds with Interval Units to give the complete frequency with which the action should be performed.
Interval Units	List	The unit of the interval corresponding to how often the action should be performed.	This value corresponds with Interval to give the complete frequency with which the action should be performed.
Mandatory	Boolean	The action is required.	This check box is filled if the action is a required action.
Name	Text	A name for the action.	This is a required field.
Nonrecurring	Boolean	Should the action be on a recurring basis or only once.	Select the check box if you only want the action performed once instead of on a recurring basis.
Performance Interval	Numeric	Reference value for the interval of the performance of the action.	The values in the Performance Interval field is not used in any calculations in ASM. You can use them as reference values, but no logic is executed based on the values. All calculations that require an interval are based on the values in the Interval field and the Interval Units field.
Performance Interval Units	List	Reference value for the interval units of the performance of the action.	The values in the Performance Interval Units field is not used in any calculations in ASM. You can use them as reference values, but no logic is executed based on the values. All calculations that require an interval are based on the values in the Interval field and the Interval Units field.
Recommended Resource	Text/List	A custom entry for a resource to execute action.	Use the drop-down list and enter text into the <b>add caption</b> box that corresponds to the custom resource.
Shutdown Required	Boolean	Is shutdown required after performing the action?	Select the check box to flag for an equipment shutdown after the action is applied.
Target Completion Date	Date/Time	Target date for the action to be executed.	Use the date/time selectors to select the date and time by which the action must be executed.

## Risk Records

The following table provides an alphabetical list and description of the fields that exist in the Risk family. The information in the table reflects the baseline state and behavior of these fields.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
Main			
Description	Text	A description for the risk.	This is not a required field.
Financial Risk	Numeric	The numeric value for the total unmitigated financial risk for the asset.	This value is calculated from the risk assessment performed by the user on the risk matrix.
Name	Text	A name for the risk.	This is a required field.
Risk Basis	Text	The basis for the risk being created.	This is not a required field.
Risk ID	Character	The ID of the risk.	Populated automatically from the name of the associated strategy when the risk is created.
Risk Rank	Numeric	The numeric value for the total unmitigated risk across all categories for the asset.	This value is calculated by APM. The calculation is done based on the user-provided values in the unmitigated risk assessments performed on the risk matrix.
Detail			
Condition	Text	The condition of the associated asset.	This is not a required field.
Failure Cause	Text	The cause of the failure.	This is not a required field.
Failure Mode	Text	The failure mode linked to the risk.	This field is automatically populated with the failure mode associated with the asset strategy.
Maintainable Item	Character	An item from an EAM system, failure codes, etc.	This value is based on an indexing system outside of APM, and therefore must be entered manually.



Field	Data Type	Description	Behavior and Usage
PF Interval	Numeric	The interval value for potential to failure of the asset.	Enter the number of the interval to be combined with the PF Interval Units.
PF Interval Units	List	Unit of measurement for the potential to failure of the asset.	The field will contain one of the following values: <ul style="list-style-type: none"> <li>• Minutes</li> <li>• Hours</li> <li>• Days</li> <li>• Weeks</li> <li>• Months</li> <li>• Years</li> </ul>

## EAM Plan Records

The following table provides an alphabetical list and description of the fields that exist in the EAM Plan Records family. The information in the table reflects the baseline state and behavior of these fields.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
EAM System ID	Character	The unique ID of the EAM System source.	This field is disabled and populated automatically.
Equipment	Character	The ID of the associated Equipment.	This field is disabled and populated automatically.
Functional Location	Character	The ID of the associated Functional Location.	This field is disabled and populated automatically.
Item Change Date	Date	The date on which the EAM Maintenance item was last modified.	This field is disabled and populated automatically.
Item Created Date	Date	The date on which the EAM Maintenance Item was created.	This field is disabled and populated automatically.
Item Description	Character	The unique ID of the EAM Maintenance Item.	This field is disabled and populated automatically.
Item ID	Character	The unique ID of the EAM Maintenance Item.	This field is disabled and populated automatically.
Item Long Text	Text	The long description of the EAM Maintenance Item.	This field is disabled and populated automatically.
Plan Call Horizon	Numeric	A numeric description of the EAM Plan.	This field is disabled and populated automatically.

Field	Data Type	Description	Behavior and Usage
Plan Category	Character	The associated category of the EAM Plan.	This field is disabled and populated automatically.
Plan Change Date	Date	The date on which the EAM plan was last modified.	This field is disabled and populated automatically.
Plan Created Date	Date	The date on which the EAM Plan was created.	This field is disabled and populated automatically.
Plan Description	Character	The short description of the EAM Plan.	This field is disabled and populated automatically.
Plan ID	Character	The unique ID of the EAM Plan.	This field is disabled and populated automatically.
Plan Interval	Numeric	The numeric interval for the plan.	This field is disabled and populated automatically.
Plan Interval Units	Character	The unit of measure for the associated interval of the plan.	This field is disabled and populated automatically.
Plan Long Text	Text	The long description of the EAM Plan.	This field is disabled and populated automatically.
Plan Start Date	Date	The date on which the EAM Plan will begin.	This field is disabled and populated automatically.
Plan Strategy	Character	Indicates the strategy plan value for plans that are not based on a cycle.	This field is disabled and populated automatically.
Task List Change Date	Date	The last modified date for the EAM Task List.	This field is disabled and populated automatically.
Task List Created Date	Date	The date on which the EAM Task List was created.	This field is disabled and populated automatically.
Task List Description	Character	The short description of the EAM Task List.	This field is disabled and populated automatically.
Task List ID	Character	The unique identifier of the EAM Task List.	This field is disabled and populated automatically.

## EAM Plan Details Records

The following table provides an alphabetical list and description of the fields that exist in the EAM Plan Details Records family.

This family is enabled for site filtering, which means that records in this family can be assigned to a specific site, and will only be accessible to users who are assigned to the same site and have the appropriate license and family privileges. For more information, refer to the Sites section of the documentation.

Field	Data Type	Description	Behavior and Usage
EAM System ID	Character	The unique ID of the EAM System source.	This field is disabled and populated automatically.
Operation Change Date	Date	The date on which the EAM Operation was last modified.	This field is disabled and populated automatically.
Operation Control Key	Date	The control key of the EAM Operation.	This field is disabled and populated automatically.
Operation Created Date	Date	The creation date for the EAM Operation.	This field is disabled and populated automatically.
Operation Description	Character	The short description of the EAM Operation.	This field is disabled and populated automatically.
Operation ID	Character	The unique ID of the EAM Plan.	This field is disabled and populated automatically.
Operation Long Text	Text	The long description of the EAM Operation.	This field is disabled and populated automatically.
Task List ID	Character	The unique ID of the EAM Task List.	This field is disabled and populated automatically.

## Catalog Items

### About the ASM Catalog Folder Structure

The main ASM Catalog folder is `\\Public\Meridium\Modules\Asset Strategy Management\Management`. This folder contains the subfolders, [Queries](#) and [Reports](#), which contain baseline queries and reports that are used by default in ASM.

Another Catalog folder is `\\Public\Meridium\Modules\Asset Strategy`. This folder contains subfolders, [Dashboards](#) and [Graphs](#), which contain baseline dashboards and graphs used by default in ASM.

If desired, you can store additional items in the main ASM Catalog folder or in the subfolders. In addition, you can create new subfolders to store additional items.

**Note:** All Public folders exist by default. Any baseline item in the Baseline folder is also available in the corresponding Public folder. Throughout this documentation, however, we refer to items in the Public folder.

### Graphs Folder

The Catalog folder `\\Public\Meridium\Modules\Asset Strategy` contains subfolders which contain the baseline graphs that are used in ASM dashboards. The following table contains the graph names and details.

Graph	Behavior and Usage
Action Count By State	Displays a graph representing all of the actions separated according to their state. This graph is used in the <b>ASM Dashboard</b> .
Cost of Events per Month by Asset	Displays a graph representing the monthly costs of maintenance for each asset. This graph is used in the <b>Asset Strategy Dashboard</b> .
Criticality Distribution	Displays a graph representing the criticality for assets. This graph is used in the <b>Asset Strategy Dashboard</b> .
Strategy Count By State	Displays a graph representing all of the strategies separated according to their state. This graph is used in the <b>ASM Dashboard</b> .
Total Cost of Unreliability	Displays a graph representing the total cost of unreliability on a monthly basis. This graph is used in the <b>Asset Strategy Dashboard</b> .
Total Unplanned Maintenance Costs	Displays a graph representing the total cost of all unplanned maintenance on a monthly basis. This graph is used in the <b>Asset Strategy Dashboard</b> .

## Reports Folder

The Catalog folder `\\Public\Meridium\Modules\Asset Strategy Management\Management\Reports` contains the baseline report that is used by default in ASM. The following table identifies that report.

Report	Behavior and Usage
Asset Strategy Approval Report	A summary report used to review an asset strategy and determine whether to approve it or send it for rework.

## Queries Folder

The Catalog folder `\\Public\Meridium\Modules\Asset Strategy Management\Management\Queries` contains the baseline queries that are used by default in ASM. The following table identifies and describes the queries.

**Note:** All Public folders exist by default. Any baseline item in the Baseline folder is also available in the corresponding Public folder. Throughout this documentation, however, we refer to items in the Public folder.

Query	Behavior and Usage
Active_Template_Search	Returns a list of all asset strategy template records that are currently in the Active state.
Asset Strategy Action Revisions	Returns a list of columns representing fields from the Action family. The query is also used to support the <b>Implement Actions</b> workspace.

Query	Behavior and Usage
Asset Strategy Actions Detail	Returns the costs and details of the asset strategy's mitigating actions. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Active Actions Detail	Returns the details of the asset strategy's active mitigating actions. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Active Mitigated Financial Risks Detail	Returns the details of all of the actions that mitigate financial risks for an asset strategy. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Active Mitigated Risks Detail	Returns the details of all the actions that mitigate risks for an asset strategy. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Definition	Returns definition information for a particular asset strategy. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Financial Risks	Returns the financial risks for an asset strategy. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Risk Profile	Returns the risk profile information for an asset strategy. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset Strategy Risk Summary	Returns strategy-level risk information. The query is also used to support the <b>Asset Strategy Approval Report</b> .
Asset_Strategy_Search	After prompting you to select a family and a state, returns a list of all asset strategy records that are linked to a record in the selected family and that are currently in the selected state. APM runs this query when you search for any strategy in ASM.
Asset_Strategy_Search_Non_Pending	After prompting you to select a family, returns a list of all asset strategy records that are linked to a record in the selected family.
Calibration Task Link Existing Query	This query is used by the ASM Implement Actions section to locate existing Calibration Tasks for implementation.
EAM Action Mapping	Returns a list of fields from the Action family that are used in the Implement as EAM Work Request and EAM Maintenance Plan features. Using this query, you can control the mappings between Action data and the EAM Notifications via the Implement as EAM Work Request and EAM Maintenance Plan features. Using Action Mappings, you can send Action information to your EAM system as a singular work request or a recurring maintenance plan.
Inspection Task Link Existing Query	This query is used by the ASM Implement Actions section to locate existing Inspection Tasks for implementation.

Query	Behavior and Usage
Locate Assets By EAM System For Import	Returns Equipment and Functional Location records where the value in the CMMS System field of the record matches the SAP System of a selected ASI package. The results of this query are displayed in the <b>Asset Strategy Builder</b> when importing SAP objects into ASI.
Locate Assets For Import	Returns a list of equipment records.
Locate Assets For Template Application	Returns assets which belong to a family that can be related to asset strategies and that are not already in a Master Template relationship.
Locate Unlinked Work Management Items For Assets	Returns all work management items, for a specified set of assets, that are not linked to an implementation package.
Strategies Without Master Templates	After prompting you to select a family, returns a list of: asset strategy records that are linked to a record in the selected family but are not linked to an asset strategy template record through the Master Template Has Asset Strategy relationship. Asset strategy records that are not linked to a record and are not linked to an asset strategy template record through the Master Template Has Asset Strategy relationship. APM runs this query when you select the <b>Add Existing</b> button on the asset strategy or when you choose to apply an asset strategy template as a master in the Apply Template Builder.
Strategy Asset Families	Returns the list of asset strategy families.
System_Strategy_Search	Returns a list of all system strategy records. APM runs this query when you select the <b>System Strategies</b> tab on the ASM Module Overview.
Template_Search	Returns a list of asset strategy templates.

## Dashboards Folder

The Catalog folder \\Public\Meridium\Modules\Asset Strategy\Dashboards contains the baseline dashboards that are used by default in ASM. The following table identifies and describes the dashboards.

Dashboard	Behavior and Usage
ASM Dashboard	Used for the <b>ASM Overview</b> page, which contains the <b>Action Count By Type</b> and <b>Strategy Count by State</b> graphs.
Asset Strategy Dashboard	Displays ASM graphs and queries as widgets. This dashboard can also be set as the <b>ASM Overview</b> page dashboard.

## Calculations

### ROI Calculation

In the **Risks** workspace of an Asset Strategy, the ROI column appears in the Mitigating Actions section, as shown in the following image. The purpose of this column is to help the user identify the relative worth of

each Action in terms of its ability to, in a cost-effective manner, mitigate the risks to which they are linked. A red outline has been added to this image to highlight the ROI column.

ASO Large UnitStrategy  
Last modified by Sumathi Iyappan on 05/17/2011 15:00:53

#### Actions

<input checked="" type="checkbox"/>	STATUS	STRATEGY ID	SYSTEM ID	NAME	ACTION TYPE	INTERVAL	INTERVAL UNITS	MAX UNMITIGATED RISK	RELEVANCE	ROI
<input checked="" type="checkbox"/>		ASO L 1	ASO Large System 1	HE-A04	PM	1	Years	9,994	28,438.39609375	508
<input checked="" type="checkbox"/>		ASO L 1	ASO Large System 1	HE-A03	PM	20	Days	9,994	23,433.396875	910
<input checked="" type="checkbox"/>		ASO L 1	ASO Large System 1	HE-A05	PM	55	Hours	9,913	14,917.8	39

For each Action displayed in the grid, ROI is calculated as:

$$\text{ROI} = \frac{([\text{Unmitigated Financial Risk} - \text{Mitigated Financial Risk}] - \text{Annual Action Cost})}{\text{Annual Action Cost}}$$

If an Action mitigates only one Risk, the unmitigated financial risk and mitigated financial risk apply only to that Risk. If, however, an Action mitigates multiple Risks, the ROI calculation uses the sum of the differences between the unmitigated and mitigated financial risks for each Risk that the Action mitigates.

## Relevance Calculations

Relevance explains how much Risk you are mitigating by performing an Action. The calculation is the Total Unmitigated Risk Rank minus the Total Action Mitigated Risk. In short, Relevance is the net non-financial benefit of performing the Action.

### Relevance Calculation Formula

The formula for Relevance calculations can be stated as:

- Total Unmitigated Risk minus Total Action Mitigated Risk

### Simple Example of a Relevance Calculation

- The Relevance formula for the below example is  $500.1 - 25.1 = 475$ . 475 is the Relevance.

Strategy Details  
Asset Strategy

G0006-098  
Asset: G0006-098 - 00000000001059058 - ...

Health: ✔ Active  
Criticality: ▲ Demo, Joe

Risks and Actions

Risk Analysis

Revisions

Implement Actions

Acti...	Mitigated Risks (1)
<input type="checkbox"/> <b>Internal Inspection</b> Interval: 1 Interval Units: Years Cost: 4,000.00 ROT: 62 Relevance: 322	<input type="checkbox"/> <b>Lubricant ...</b> Actio... : 25.1 Unm...: 500.1
<input type="checkbox"/> <b>Lube Oil Analysis</b> Interval: 3 Interval Units: Months Cost: 100.00 ROT: 1,187 Relevance: 475	
<input type="checkbox"/> <b>Motor Test</b> Interval: 1 Interval Units: Years Cost: 500.00 ROT: 124 Relevance: 125	
<input type="checkbox"/> <b>Operational Check</b>	

Mitigated 
  Unmitigated 
  Added 
  Deleted 
  Modified 
  Mandatory 
  Consolidated

- The Relevance formula for the below example is  $150.1 - 25.1 = 125$ . 125 is the Relevance.

Strategy Details  
Asset Strategy

G0006-098  
Asset: G0006-098 - 00000000001059058 - ...

Health: ✔ Active  
Criticality: ▲ Demo, Joe

Risks and Actions

Risk Analysis

Revisions

Implement Actions

Acti...	Mitigated Risks (1)
<input type="checkbox"/> <b>Lube Oil Analysis</b> Interval: 3 Interval Units: Months Cost: 100.00 ROT: 1,187 Relevance: 475	<input type="checkbox"/> <b>Motor (Dr...</b> Actio... : 25.1 Unm...: 150.1
<input type="checkbox"/> <b>Motor Test</b> Interval: 1 Interval Units: Years Cost: 500.00 ROT: 124 Relevance: 125	
<input type="checkbox"/> <b>Operational Check</b> Interval: 1 Interval Units: Weeks Cost: 0.00 ROT: 250,000 Relevance: 277.5	
<input type="checkbox"/> <b>Vibration Analysis</b>	

Mitigated 
  Unmitigated 
  Added 
  Deleted 
  Modified 
  Mandatory 
  Consolidated



## Complex Example of a Relevance Calculation

The Relevance formula for the below can be broken down as follows:

- Total Unmitigated Risk Rank
  - $150.1 + 183 = 333.1$
- Total Action Mitigated Risk Rank
  - $25.1 + 30.5 = 55.6$
- Relevance
  - $333.1 - 55.6 = 277.5$

Strategy Details  
Asset Strategy

G0006-098  
Asset: G0006-098 - 00000000001059058 - ...

Health: ✔ Active  
Criticality: ▲ Demo, Joe

Risks and Actions

Relevance: 475

Action	Interval	Interval Units	Cost	ROI	Relevance
<input type="checkbox"/> Motor Test	1	Years	500.00	124	125
<input type="checkbox"/> Operational Check	1	Weeks	0.00	250,000	277.5
<input type="checkbox"/> Vibration Analysis	1	Months	50.00	416	400

Mitigated Risks (2)

Risk	Action Relevance	Unmitigated Relevance
<input type="checkbox"/> Casing Le...	25.1	150.1
<input type="checkbox"/> Seal Leak	30.5	183

Mitigated  
  Unmitigated  
  Added  
  Deleted  
  Modified  
  Mandatory  
  Consolidated