

Service Description

IBM Maximo EAM SaaS Flex

This Service Description describes the Cloud Service. The applicable order documents provide pricing and additional details about Client's order.

1. Cloud Service

IBM Maximo EAM SaaS Flex is an enterprise asset management solution that includes or supports the following processes and functions:

- Enterprise asset management – Track and manage asset and location data throughout the asset lifecycle. Identify asset characteristics, classifications, metering, inspection routes, and maintenance plans.
- Work management – Manage planned and unplanned work activities, preventive and predictive maintenance, multi-phased projects, services, emergency, and corrective maintenance from initial request through completion and recording. Promote workforce efficiency through assignments, work balancing, and automated reporting.
- Inventory management – Track and manage details of asset and spare parts inventory, including quantity, location, usage, and value across multiple storerooms and warehouses. Perform cycle and physical counts.
- Procurement management – Support direct purchasing and inventory replenishment through automated replenishment, requisitions, requests for quotes, purchase orders, receiving, and invoice matching.
- Contract management – Manage and use purchase, lease, rental, warranty, labor rate, software, master, blanket and user-defined contracts to improve purchasing efficiency and leverage standard agreements.
- Service management – Define service offerings, establish service level agreements (SLAs), monitor service level delivery and implement escalation procedures. Provide access across an organization for service requests.

IBM Maximo EAM SaaS Flex provides tools for application tailoring and administration including support for integrations with other systems. Tailoring tools include database configuration, application design, workflow design and management, report writing (including automated report processing and ad-hoc reporting), security profile definition and assignment, data validation rules, and configuration migration tools.

Client's subscription to IBM Maximo EAM SaaS Flex includes one production environment and one non-production environment. The number of users in a production environment is limited by the quantities of subscriptions ordered. No more than 30 users can access the non-production Instance simultaneously.

1.1 Offerings

The Client may select from the following available offerings.

1.1.1 Cloud Service Subscription User Subscriptions

IBM Maximo EAM SaaS Flex is a subscription-based service offering different levels of access and frequency of use. The types of subscriptions are defined here.

1.1.2 IBM Maximo EAM SaaS Flex Authorized User

An IBM Maximo EAM SaaS Flex Authorized User subscription allows a single end user entitlement to read and write access to Maximo applications including configuration and platform tools. An Authorized User is a unique person who is given access to the program through security controls.

1.1.3 IBM Maximo EAM SaaS Flex Concurrent User

An IBM Maximo EAM SaaS Flex Concurrent User subscription allows the utilization of the program to be monitored for the number of users who are accessing the system at any given time. The number of individuals who are allowed to access the system can exceed the number of concurrent subscriptions as long as the number using the system at any given time does not exceed the concurrent user limit.

1.1.4 IBM Maximo EAM SaaS Flex Limited Use User

An IBM Maximo EAM SaaS Flex Limited Use User subscription allows a single end user entitlement to read and write access to a limit of three (3) modules within the Maximo program based on their security profile. The modules that can be selected from consist of: Assets, Analytics, Building Information Models, Contracts, Financial, Inventory, Planning, Preventive Maintenance, Purchasing, Service Levels, Task Management, and Work Orders. Excluded from the list of modules from which Limited Use users can access are: Administration, Integration, Security, and System Configuration. A Limited Use User is a unique person who is given access to the program through security controls.

1.1.5 IBM Maximo EAM SaaS Flex Express Use Authorized User

An IBM Maximo EAM SaaS Flex Express Use Authorized User subscription allows a single end user entitlement to access Maximo for the purpose of running and viewing reports, viewing read-only records, changing status on records that have the ability to have their status changed, and making updates to Work Orders or Inspections that have been assigned to that person. Work Order updates can be made using the Work Order, Quick Reporting, or Labor Reporting applications. Inspections can be updated using the Work Order application or the Conduct Inspection work center. Express Use users can insert new Work Orders to report problems found while working on their assigned work. An Express Use Authorized User is a unique person who is given access to the program through security controls.

1.1.6 IBM Maximo EAM SaaS Flex Express Use Concurrent User

An IBM Maximo EAM SaaS Flex Express Use Concurrent User subscription allows the same access privileges as defined for the IBM Maximo EAM SaaS Flex Express Use Authorized User. The Concurrent User subscription allows the utilization of the program to be monitored for the number of users who are accessing the system at any given time and are controlled for their access rights as defined for an Express Use user in the security profiles. The number of individuals who are allowed to access the system can exceed the number of concurrent subscriptions as long as the number using the system at any given time does not exceed the concurrent user limit.

1.2 Optional Services

Industry Solutions and Add-Ons

1.2.1 IBM Maximo EAM SaaS Flex Scheduler

IBM Maximo EAM SaaS Flex Scheduler is an end-to-end work management tool for IBM Maximo Asset Management. It enables planners and schedulers to graphically view work orders and preventive maintenance schedules on a Gantt chart, providing access to critical factors needed for the creation of an accurate and meaningful work schedule. It also accommodates the needs of the supervisors, dispatchers, and the field technicians in an effort to streamline the entire Maximo work management process.

1.2.2 IBM Maximo EAM for Managed Service Provider Add-On SaaS Flex

IBM Maximo EAM for Managed Service Provider Add-On SaaS Flex delivers a suite of service-as-a-business applications, such as those allowing Client to manage customers, customer agreements with billing and price schedules, service delivery, supplier contracts, and customer billing. This add-on supports service as a business and ensures that only authorized users can view information about its customers.

1.2.3 IBM Maximo EAM SaaS Flex Calibration Add-On

IBM Maximo EAM SaaS Flex Calibration Add-On provides a solution to manage calibrated assets and the standards used to calibrate them, with features such as traceability and reverse traceability, calibration history data, calibration data sheets, and reporting.

1.2.4 IBM Maximo EAM SaaS Flex Health, Safety, and Environment Manager Add-On

IBM Maximo EAM SaaS Flex Health, Safety and Environment Manager Add-On supports enterprises in improving safety, reliability, and compliance with regulations. This solution provides a central application for reporting incidents spanning work, personnel, safety, health, and environmental areas.

1.2.5 IBM Maximo EAM SaaS Flex Linear Asset Manager Add-On

IBM Maximo EAM SaaS Flex Linear Asset Manager Add-On extends the capabilities of IBM Maximo EAM SaaS Flex to include management of linear assets, enabling the change of characteristics over the span of a linear asset using dynamic segmentation.

1.2.6 IBM Maximo EAM SaaS Flex Spatial Asset Management Add-On

IBM Maximo EAM SaaS Flex Spatial Asset Management Add-On allows users to view geographic information systems (GIS) information inside IBM Maximo EAM. This add-on provides a geospatial context of work, assets, and land-based features.

1.2.7 IBM Maximo EAM SaaS Flex Transportation Add-On

IBM Maximo EAM SaaS Flex Transportation Add-On provides users with enterprise asset management practices for transportation assets including fleets of cars, trucks, buses, locomotives, rail vehicles, aircraft, vessels, and related linear assets, such as power lines and highways.

1.2.8 IBM Maximo EAM SaaS Flex Aviation Add-On

IBM Maximo EAM SaaS Flex Aviation Add-On provides aviation organizations with aircraft related configuration management, airworthiness evaluations, maintenance planning, scheduling and management features.

1.2.9 IBM Maximo EAM SaaS Flex Life Sciences Add-On

IBM Maximo EAM SaaS Flex Life Sciences Add-On provides users with the ability to monitor, track, and manage tools, equipment, facilities, mobile, and IT assets on a validated platform.

1.2.10 IBM Maximo EAM SaaS Flex Nuclear Add-On

IBM Maximo EAM SaaS Flex Nuclear Add-On provides asset advanced capabilities required for nuclear power managers and nuclear asset lifecycle management via a single platform.

1.2.11 IBM Maximo EAM SaaS Flex Oil and Gas Add-On

IBM Maximo EAM SaaS Flex Oil and Gas Add-On offers users the ability to manage production equipment, facilities, transportation, and infrastructure assets on a single, integrated platform combining health, safety, and environment tracking with asset lifecycle management.

1.2.12 IBM Maximo EAM SaaS Flex Utilities Add-On

IBM Maximo EAM SaaS Flex Utilities Add-On provides a consolidated solution to manage power generation and distribution systems via a single platform and database.

1.2.13 IBM Maximo EAM SaaS Flex Asset Configuration Manager Add-On

IBM Maximo EAM SaaS Flex Asset Configuration Manager Add-On provides configuration management including the definition of standard model to which assets are compared to validate the real-time calculation of an asset's configuration and the component life of the asset.

1.2.14 IBM Maximo EAM Anywhere SaaS Flex

IBM Maximo EAM Anywhere SaaS Flex provides Clients without IBM Maximo EAM SaaS Flex subscriptions remote access only from mobile devices to IBM Maximo EAM SaaS Flex processes, work, and asset management via a customizable interface. The Maximo Anywhere solution supports disconnected operations through a download of required data when connectivity is available.

1.2.15 IBM Maximo EAM Anywhere SaaS Flex Add-On

IBM Maximo EAM Anywhere SaaS Flex Add-On provides Clients with IBM Maximo EAM SaaS Flex subscriptions remote access from mobile devices to IBM Maximo EAM SaaS Flex processes, work, and asset management via a customizable interface. The Maximo Anywhere solution supports disconnected operations through a download of required data when connectivity is available.

1.2.16 IBM Maximo Asset APM Health Insights SaaS Flex Add-On

IBM Maximo Asset Health Insights SaaS Flex allows reliability engineers and maintenance supervisors to gain a better understanding of the health of their assets. IBM Maximo Asset Health Insights SaaS Flex has capabilities that:

- Provide the capability to define and normalize asset health based on key drivers, such as remaining useful life, maintenance and failure history, overdue preventive maintenance, and condition based on real-time and historical meter and sensor information and weather
- Consolidate information around business asset health for reliability engineers and maintenance supervisors, including asset history and real-time and historical sensor data from the assets

- Provide users with the capability to drill into business assets by location, hierarchy, or asset class to understand the full context of the health of critical assets
- Leverage real-time information and analytics using the IBM Watson Internet of Things Platform, along with other information sources such as current and historical weather

This set of capabilities provides a single view as part of the Maximo system instead of having to use multiple views from several different tools to achieve the same result. IBM Maximo Asset APM Health Insights is delivered with basic content covering reports, templates, user roles, and security groups, enables support for integrations for certain systems, and provides tools to help support application configuration.

1.2.17 IBM Maximo EAM SaaS Flex Scheduler Plus Add-On

IBM Maximo EAM SaaS Flex Scheduler Plus Add-On is an advanced work management tool for Maximo Asset Management that extends Maximo Scheduler's capabilities to enable users to manage large projects (such as shutdowns, outages, and turnarounds) as well as planned and unplanned maintenance, across either a broad geographic area or where weather plays an important factor in asset availability. With this Maximo embedded solution, end-to-end work management can be accomplished managed using a single system of record.

IBM Maximo Asset Management Scheduler Plus capabilities include:

- A Customer Appointment Booking application that enables the Customer Service Representative to schedule appointments by factoring in the customer and technician availability as well as the weather forecast for the day that the appointment is needed.
- Streamlined interface that enables users to model complex work order networks so that dependencies between tasks under different parent work orders or between a task and a different parent work order can easily be managed graphically.
- Integration with The Weather Company weather data that enables users to factor weather while planning, scheduling, and assigning work and react to changes based on weather events. This includes the capability to configure the weather data, enabling users to set up the attributes they wish to see in the Graphical Scheduling, Graphical Assignment, and Graphical Appointment Book applications.

IBM Maximo EAM SaaS Flex Scheduler is a prerequisite for this Cloud Service. Client must acquire appropriate user entitlements of the same type in order to use this Cloud Service.

1.2.18 IBM Maximo EAM SaaS Flex Adapter for Oracle Applications

The IBM Maximo EAM SaaS Adapter for Oracle Applications provides pre-built configurable integration and business process support to allow Maximo to interface with the Oracle enterprise resource planning system.

1.2.19 IBM Maximo EAM SaaS Flex Adapter for SAP Applications

The IBM Maximo EAM SaaS Adapter for SAP Applications provides pre-built configurable integration and business process support to allow Maximo to interface with the SAP enterprise resource planning system.

Cloud Infrastructure and Environment Services

1.2.20 IBM Maximo EAM SaaS Flex Non-Production Instance

IBM Maximo EAM SaaS Flex Non-Production is an optional service that provides all of the capability available with the base offering described in Section 1 but provided in a Non-Production Instance. For performance reasons, no more than 30 users can use the non-production Instance simultaneously in any manner directly or indirectly (for example: via a multiplexing program, device, or application server) through any means.

1.2.21 IBM Maximo EAM SaaS Flex Non-Production Capacity Add-On

IBM Maximo EAM SaaS Flex Non-Production Capacity Add-On is an optional service that increases the size of one IBM Maximo EAM SaaS Flex Non-Production Instance to allow an additional 30 users to access the instance simultaneously.

1.2.22 IBM Maximo EAM SaaS Flex Full Access Development Environment Non-Production Add-On

The IBM Enterprise Asset Management on Cloud Flex Full Access Development Environment (Maximo) Non-Production Add-On provides Client with a Non-Production instance and enhanced access for

development purposes. This includes enhanced level of access to support development tasks, database access and SQL tools, BIRT report development, ability to deploy code as well as rebuild/redeploy the maximo.war file and WebSphere console access.

1.2.23 IBM Maximo EAM SaaS Flex Enhanced Disaster Recovery Add-On

The IBM Maximo EAM Enhanced Disaster Recovery option provides a second Maximo environment in a second data center configured for a base number of users, scalable if necessary. Database replication is enabled such that transactions are recorded in each environment. The objective is to minimize data loss and return a system to operations in 24 hours.

1.2.24 IBM Maximo EAM SaaS Flex Capacity for Production Instance

The IBM Maximo EAM SaaS Flex Capacity for Production Instance option add an instance of the Maximo program to the Production instance in order to support improved performance and load balancing above the default level based on the user subscription capacity. Each Add-On Capacity instance increases the horizontal size of the Production environment by adding a user interface server with 4 processor cores and 32GB RAM.

1.2.25 IBM Maximo EAM SaaS Flex Bare Metal Server Deployment

- All SaaS environments are deployed using virtual servers by default. The IBM Maximo EAM SaaS Flex Bare Metal Server Deployment option will install the database server for the Maximo environment directly onto servers as opposed to using virtualized servers. The default sizing of the Bare Metal Server Deployment option is a single quad-core processor with 32GB or RAM. Multiple quantities can be ordered to build larger deployments if required.
- The Bare Metal Server Deployment option is required when the client elects to retain an existing Oracle relational database management system and provides appropriate licensing to IBM to support the full production environment and all non-production environments.

1.2.26 IBM Maximo EAM SaaS Flex Reporting Database

The IBM Maximo EAM SaaS Flex Reporting Database option provides a second Maximo database to support frequent and complex reporting and analytics requirements that are impacting end user performance in the original Maximo database. Database replication is enabled such that transactions are recorded in each environment.

1.2.27 IBM Maximo EAM SaaS Flex Capacity for Flex Enhanced Access Development Environment

Each IBM Maximo EAM SaaS Flex Capacity for Flex Enhanced Access Development Environment option increases the size of one Enhanced Access Development Environment to allow an additional Maximo user interface server consisting of one quad-core processor and 32GB RAM. Once this additional capacity is configured for an environment, it is not transferable to another environment.

1.2.28 IBM Maximo EAM SaaS Flex SFTP Account

The IBM Maximo EAM SaaS Flex SFTP Account option provides a second Secure File Transfer Protocol (SFTP) account for the movement of data between the Maximo cloud environment and locally hosted systems over a Secure Shell (SSH) data stream. Up to five (5) SFTP accounts can be created.

1.2.29 IBM Maximo EAM SaaS Flex VPN IPsec Tunnel Setup

The IBM Maximo EAM SaaS Flex VPN IPSEC Tunnel Setup option provides setup and continuous operation of a Virtual Private Network (VPN) Internet Protocol Security (IPsec) connection between the IBM Maximo EAM SaaS Flex environment and locally hosted systems. An IPsec site-to-site VPN tunnel is used to encrypt traffic between security IPsec gateways. This can be used to support certain system interfaces, read-only database access, LDAP synchronization, and other communications that the client is unwilling or unable to support over Secure Socket Layer (SSL, or HTTPS://) connections.

1.2.30 IBM Maximo EAM SaaS Flex IP Whitelisting

The IBM Maximo EAM SaaS Flex IP Whitelisting option provides configurations to the IBM Maximo EAM SaaS Flex environment to restrict access to a client-defined and approved list of trusted Internet Protocol (IP) addresses or IP ranges.

1.2.31 IBM Maximo EAM SaaS Flex Availability for Non-Production Systems

The IBM Maximo EAM SaaS Flex Availability for Non-Production Systems option configures a single Non-Production Maximo environment to support the same level of uptime standards as the Production environment.

2. Data Processing and Protection Data Sheets

IBM's Data Processing Addendum at <http://ibm.com/dpa> (DPA) and the Data Processing and Protection Data Sheet(s) (referred to as data sheet(s) or DPA Exhibit(s)) in the links below provide additional data protection information for the Cloud Services and its options regarding the types of Content that may be processed, the processing activities involved, the data protection features, and specifics on retention and return of Content. The DPA applies to personal data contained in Content, if and to the extent i) the European General Data Protection Regulation (EU/2016/679) (GDPR); or ii) other data protection laws identified at <http://www.ibm.com/dpa/dpl> apply.

<https://www.ibm.com/software/reports/compatibility/clarity-reports/report/html/softwareReqsForProduct?deliverableId=91E58490BC4911E499F1528B5A128231>

3. Service Levels and Technical Support

3.1 Service Level Agreement

IBM provides Client with the following availability service level agreement (SLA). IBM will apply the highest applicable compensation based on the cumulative availability of the Cloud Service as shown in the table below. The availability percentage is calculated as the total number of minutes in a contracted month, minus the total number of minutes of Service Down in the contracted month, divided by the total number of minutes in the contracted month. The Service Down definition, the claim process and how to contact IBM regarding service availability issues are in IBM's Cloud Service support handbook at https://www.ibm.com/software/support/saas_support_overview.html.

Availability	Credit (% of monthly subscription fee*)
Less than 99.9%	2%
Less than 99.0%	5%
Less than 95.0%	10%

* The subscription fee is the contracted price for the month which is subject to the claim.

3.2 Technical Support

Technical support for the Cloud Service, including support contact details, severity levels, support hours of availability, response times, and other support information and processes, is found by selecting the Cloud Service in the IBM support guide available at <https://www.ibm.com/support/home/pages/support-guide/>.

4. Charges

4.1 Charge Metrics

The charge metric(s) for the Cloud Service are specified in the Transaction Document.

The following charge metrics apply to this Cloud Service:

- Authorized User is a unique user authorized to access the Cloud Services in any manner directly or indirectly (for example, through a multiplexing program, device or application server) through any means.
- Instance is each access to specific configuration of the Cloud Services.
- Concurrent User is a user simultaneously accessing the Cloud Service in any manner directly or indirectly (for example, through a multiplexing program, device, or application server) at any particular point in time. A person who is simultaneously accessing the Cloud Service multiple times counts only as a single Concurrent User.

- Asset is a uniquely identified tangible resource or item of value to be accessed or managed by the Cloud Services.
- Item is an occurrence of a specific item that is managed by, processed by, or related to the use of the Cloud Service.

For this Cloud Service, an Item is a Work Order. A Work Order is an object used to record authorization for a particular job or project, in context to a location, asset or GL account. It may contain multiple tasks (job steps), labor, material, and services required to perform the job or project correctly. A Work Order managed by both the IBM Maximo EAM SaaS Flex and IBM Maximo EAM SaaS Flex Scheduler counts as a single Work Order for purposes of entitlements.

5. Additional Terms

For Cloud Service Agreements (or equivalent base cloud agreements) executed prior to January 1, 2019, the terms available at <https://www.ibm.com/acs> apply.

5.1 Verification

Client will i) maintain, and provide upon request, records, and system tools output, as reasonably necessary for IBM and its independent auditor to verify Client's compliance with the Agreement, and ii) promptly order and pay for required entitlements at IBM's then current rates and for other charges and liabilities determined as a result of such verification, as IBM specifies in an invoice. These compliance verification obligations remain in effect during the term of the Cloud Service and for two years thereafter.

5.2 Backups

Backups are performed within a four (4) hour period daily for production instances and within a twelve (12) hour period daily for non-production instances. IBM will retain a backup copy of Client's data for a maximum period of 28 days for production instances and up to 7 days for non-production instances. Client is responsible for configuring the Cloud Service security to prohibit individual users from deleting data, and once the data is deleted Client acknowledges and agrees IBM is not obligated to recover the deleted data and, if available, may charge for such effort.

5.3 Disaster Recovery

If Client has purchased at least one non production environment, in the event of a major system disruption caused by a natural disaster (e.g. fire, earthquake, flood, etc.), disaster recovery will be accomplished by using commercially reasonable efforts to restore Client's production data to one of Client's non-production environments with a recovery objective of 72 hours. This is not a warranty and no service level agreement is available.

5.4 Non-Production Limitation

If the Cloud Service is designated as "Non-Production", the Cloud Service can be used by Client only for internal non-production activities, including testing, performance tuning, fault diagnosis, internal benchmarking, staging, quality assurance activity and/or developing internally-used additions or extensions to the Cloud Service using published application programming interfaces. Client is not authorized to use any part of the Cloud Service for any other purpose without acquiring the appropriate production entitlements.

Users of one or more Non-Production Instances of the Cloud Service must be entitled to IBM Maximo EAM SaaS Flex.

IBM Maximo EAM SaaS Flex Non-Production instances do not include high availability or the same frequency of backup as provided with the production instance. For performance reasons, no more than 30 users can use the non-production Instance simultaneously in any manner directly or indirectly (for example: via a multiplexing program, device, or application server) through any means.

Each IBM Maximo EAM SaaS Flex Non-Production Capacity Add-On entitlement increases the size of one IBM Maximo EAM SaaS Flex Non-Production instance to allow an additional 30 users to access the instance simultaneously. If Client adds capacity to an IBM Maximo EAM SaaS Flex Non-Production instance by purchasing the IBM Maximo EAM SaaS Flex (Maximo) Non-Production Capacity Add-On, that additional capacity cannot be re-assigned to another IBM Maximo EAM SaaS Flex Non-Production instance at a later date.

With IBM Maximo EAM SaaS Flex Full Access Development Environment Non-Production Add-On, up to 5 users are provided remote access with an enhanced level of control in the environment. Client must be entitled to the IBM Maximo EAM SaaS Flex to access an IBM Maximo EAM SaaS Flex Full Access Development Environment (Maximo) Non Production Add-On instance(s) of the Cloud Service.

5.5 IBM Maximo EAM SaaS Flex Product Limitations

All entitled users of the following products must also have an entitlement of the same user type to IBM Maximo EAM SaaS Flex:

- IBM Maximo EAM SaaS Flex Scheduler
- IBM Maximo EAM SaaS Flex Asset Configuration Manager Add-On
- IBM Maximo EAM SaaS Flex Aviation Add-On
- IBM Maximo EAM SaaS Flex Calibration Add-On
- IBM Maximo EAM for Managed Service Provider Add-On SaaS Flex
- IBM Maximo EAM SaaS Flex Health, Safety and Environment Manager Add-On
- IBM Maximo EAM SaaS Flex Life Sciences Add-On
- IBM Maximo EAM SaaS Flex Linear Asset Manager Add-On
- IBM Maximo EAM SaaS Flex Nuclear Add-On
- IBM Maximo EAM SaaS Flex Oil and Gas Add-On
- IBM Maximo EAM SaaS Flex Spatial Asset Management Add-On
- IBM Maximo EAM SaaS Flex Transportation Add-On
- IBM Maximo EAM SaaS Flex Utilities Add-On
- IBM Maximo EAM Anywhere SaaS Flex (Maximo) Add-On

IBM Maximo Asset Health Insights, IBM Maximo Asset Management Scheduler Plus and IBM Maximo Asset Management Scheduler Plus Bundle require the prerequisite and separate purchase of the appropriate user entitlements to IBM Maximo EAM SaaS Flex.

Clients that are using the Cloud Service solely for the following purposes or are using only the following functions of the Cloud Service do not require entitlements to the Cloud Service:

- Entering service requests and viewing the status of their service requests.
- Creating and viewing requisitions, viewing templates and viewing drafts via the Desktop Requisitions application.
- Use of the Graphical Appointment Book application in IBM Maximo EAM Scheduler Plus SaaS Flex.

If the Cloud Service is designated as "Limited Use" the user is only entitled to use up to three (3) modules within the applicable Cloud Service, excluding the Administration, Integration, Security, and System Configuration modules.

If the Cloud Service is designated as "Express Use" the user is only entitled to access the Cloud Service for the purpose of running and viewing reports, read only view of records, changing status of records and updating work orders that have been assigned to the Client.