Functional Specification
GAP3.03 CR495 Customer, Agreement, Price schedule and Service Area on PM

Coor Service Management

2016-04-20

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1.1 Appendix

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1.2 Versions

Date	Author	Version Information
1	Andrzej Wieclaw	Initial version
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2. Objectives

The primary objective of this document is to describe functional changes to Coor Maximo 7.1 As-Is solution after upgrade to Maximo 7.6.

3. Overview

Maximo 7.1 has been customized in order to be able to be able to:
1. Specify Customer, Agreement, Price Schedule, Service & Service Area on PM
2. Propagate Customer, Agreement, Price Schedule, Service & Service Area from PM to WO and child WOs at the time of PM WO generation.

This customization need to be re-applied in Maximo 7.6.

4. Changes

4.1   Data Model

4.1.1   Objects

Keep Maximo 7.1 PM object custom attributes:
- C_PLUSPCUSTOMER
- C_PLUSPAGREEMENT
- C_PLUSPPRICESCHED

4.1.2   Relationships

C_PLUSPPRICESCHED_LASTREV – Relationship to the PlusPAgreement table, used to find the latest revision of the price schedule associated with a PM or WORKORDER.

Parent	Child	Where Clause
PM	PLUSPPRICESCHED	orgid=:orgid and agreement=:c_pluspagreement and priceschedule=:c_plusppricesched and revisionnum = (select max(revisionnum) from plusppricesched where orgid=:orgid and agreement=:c_pluspagreement and priceschedule=:c_plusppricesched and objectname = 'WORKORDER' and status in (select value from synonymdomain where maxvalue in ('WSTART', 'APPR', 'REVISED', 'EXPIRE') and domainid = 'PLUSPAGREESTATUS'))
WORKORDER	PLUSPPRICESCHED	orgid=:orgid and agreement=:pluspagreement and priceschedule=:plusppricesched and revisionnum = (select max(revisionnum) from plusppricesched where orgid=:orgid and agreement=:pluspagreement and priceschedule=:plusppricesched and objectname = 'WORKORDER' and startdate <=:reportdate and (enddate >= :reportdate or enddate is null) and status in (select value from synonymdomain where maxvalue in ('WSTART', 'APPR', 'REVISED', 'EXPIRE') and domainid = 'PLUSPAGREESTATUS'))

4.1.3   Conditional Expressions

Condition	Description	Expression
C_PMASSLOC	PM Asset or Location specified	:assetnum is null and :location is null
C_WOCOMM	Require WO Service	:status is not null and :status not in (:&synonymlist&_wostatus[WAPPR,CAN])

4.1.4   Global Attribute Restrictions

Object	Attribute	Application	Condition
PM	ASSETNUM		C_PMASSLOC

PM	LOCATION		C_PMASSLOC
WORKORDER	COMMODITY	PLUSPWO	C_WOCOMM

4.2 Applications

4.2.1 Preventive Maintenance

4.2.1.1 Advanced Search Dialog

Provide ability to search PM by customer, agreement or price schedule.

Figure 1. Preventive Maintenance Advanced Search dialog

4.2.1.2 PM Details

Following rules will be applied to PM records:
1. Require PM asset **OR** location reference.
2. Require customer, agreement, price schedule as well as service area and service.
3. Default PM Service Area and Service to either Asset or Location Service Area and Service.

Figure 2. Preventive Maintenance details

4.2.2 PM Work Orders Generation

When generating PM work orders following rules will be applied:
1. Copy Customer to WO
2. Copy Service Area and Service to WO but only if PM is missing asset reference.
3. Attempt to apply Agreement and Price Schedule to WO. If this operation fails for any reason, then clear WO agreement and price schedule references.
4. Overwrite WO GL account with PM GL account but only if U*se PMs GL Account on Route Stop Workorders* (PM.C_USEPMGLONROUTESTOPS) flag is set.
5. Apply rules #1-4 to all WO tasks and children being result of Maximo standard WO generation based on PM Job Plan and/or Routes configuration.

4.1 Customizations

The list below contains affected classes and their general purpose:

Class	Method	Comment
com.ibm.tivoli.custom.	add()	Control PM.C_CUSTOMER editibility

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app.pm.FldPMLocation		Set/Clear PM Service Area and Service based on LOCATIONS Service Area and Service
com.ibm.tivoli.custom. app.pm.FldPMAssetnum	add()	Control PM.C_CUSTOMER editibility Set/Clear PM Service Area and Service based on ASSET Service Area and Service
com.ibm.tivoli.custom. plusp.app.pm. PlusPFldPMCustomer	<ctor>()	Initialize relationship to PLUSPCUSTOMER
	init(), action()	Control PM.C_PLUSPAGREEMENT editibility
com.ibm.tivoli.custom. plusp.app.pm. PlusPFldPMAgreement	<ctor>()	Initialize relationship to PLUSPAGREEMENT
	init(), action()	Control PM.C_PLUSPPRICESCHED editibility
com.ibm.tivoli.custom. plusp.app.pm. PlusPFldPMPriceSchedule	<ctor>()	Initialize relationship to PLUSPPRICESCHED
com.ibm.tivoli.custom. app.pm.FldPMRoute	init(), action()	Control PM.C_USEPMGLONROUTESTOPS editibility and actual value
com.ibm.tivoli.custom. plusp.app.workorder.PlusPWO	setAttrFromWoGen(MboRemote) applyRoute(*)	See 4.2.2 PM Work Orders Generation section above for more details