



Service Requests: Helpful Automations

James A. Hayes, PMP

Agenda


- Quick Overview of Service Request configuration
 - Classifications (Cat/Subcat, Attributes, SR Relationships)
 - Ticket Templates
- Helpful Automations
 - Escalations & Notifications
 - Related Records
 - Status Changes
 - Ownership
 - Logs
 - Asset Moves
- Q&A


Classifications

- Classifications create your SR categories and sub-categories.
- Image associated with Classification is icon displayed in the SRWC

Submit new request

Search Categories

 Tooling

 Production Engineering

Can't find what you're looking for?
[Describe the issue](#)

Classifications

Query Find Classification Select Action

List View Classifications

Classification: 1000 Tooling Organization: Organization: Site: Use Classification? Show in Service Request Work Center? Show in Asset Business View?

Classification Path: 1000 Tooling

Parent Classification: >

Generate Description?

Order: 2

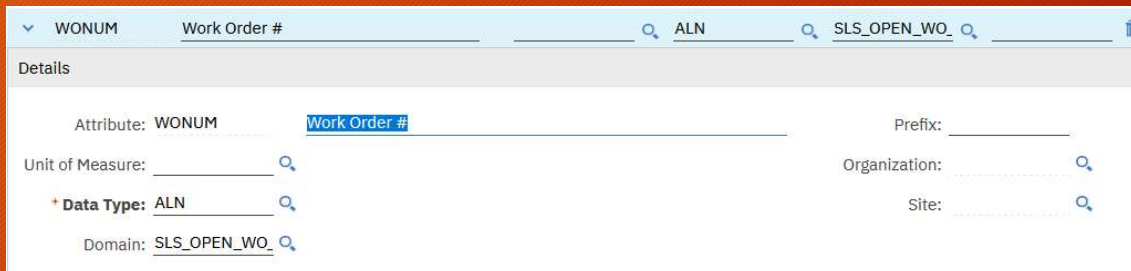
Use With Filter 1 - 1 of 1

Use With Object	Description	Top Level?
SR	Use with Service Requests	<input type="checkbox"/>

New Row

Classifications - Attributes

- In the Classifications application under Select Action → Add/Modify Properties → Attributes
- Attributes allow you to associate value fields with your classifications and use in your Ticket Templates
- Attributes are defined for all classifications



The screenshot displays the 'Details' view for an attribute named 'WONUM'. The attribute is associated with the value field 'Work Order #'. The data type is set to 'ALN' and the domain is 'SLS_OPEN_WO'. Other fields like 'Unit of Measure', 'Prefix', 'Organization', and 'Site' are currently empty.

Field	Value
Attribute:	WONUM
Value Field:	Work Order #
Unit of Measure:	
Data Type:	ALN
Domain:	SLS_OPEN_WO
Prefix:	
Organization:	
Site:	

Classification - Attributes (cont.)

- SRWC cannot utilize Table domains; you have to get creative.
- Database Triggers
- Escalations

```
DROP TRIGGER MAXIMO.SLS_OPEN_WO_LIST_DOMAIN_ADD;

CREATE OR REPLACE TRIGGER MAXIMO.SLS_OPEN_WO_LIST_DOMAIN_ADD
AFTER INSERT
ON MAXIMO.WORKORDER
REFERENCING NEW AS New OLD AS Old
FOR EACH ROW
WHEN (
    NEW.WOCLASS = 'WORKORDER'
)
DECLARE
alndomainseq VARCHAR2(40);

BEGIN

    alndomainseq := '1';
    begin
        select maximo.ALNDOMAINSEQ.nextval into alndomainseq from dual;
    end;

    begin
        insert into MAXIMO.ALNDOMAIN (domainid, value, description, alndomainid, valueid)
        values ('SLS_OPEN_WO_LIST', :NEW.WONUM, substr(:NEW.WONUM || ': ' || :NEW.DESCRPTION,1,50), alndomainseq, 'SLS_OPEN_WO_LIST|' || :NEW.WONUM);
    end;

END SLS_OPEN_WO_LIST_DOMAIN_ADD;
```

Classifications - Attributes (cont.)

- Additional steps to leverage attributes in communications and automation scripts
- Create a relationship on the SR object to the TICKETSPEC object for each attribute you want the value returned:

Relationship: SRSPECWONUM	Child Object: TICKETSPEC 
Where Clause: <code>refobjectid=:ticketuid and refobjectname='SR' and classstructureid=:classstructureid and assetattrid='WONUM'</code>	Remarks: Returns WONUM specification value from SR

Work Order - :SRSPECWONUM.ALNVALUE

Relationship: SRSPECWO	Child Object: WORKORDER 
Where Clause: <code>wonum=(select max(alnvalue) from ticketspec where ticketid=:ticketid and class='SR' and assetattrid='WONUM')</code>	Remarks: Returns the work order record associated with the WONUM specification value of the SR. Returns 0 or 1 record.

Ticket Templates

- Ticket templates allow you to define specific issues under an associated classification.
- Ticket template Specifications tab allows you to select which Classification Attributes you want to capture during creation.
- Instructions' long description is displayed in the SRWC as guidance for completing the ticket.

Template: 1005 I am starting (or taking off hold) a work order **Class:** SR Status: ACTIVE

Details

Owner Group: _____ > Service Group: _____ > Classification: 1000 \ 1001 >

Owner: _____ > Service: _____ > Class Description: Work Order

Specifications **Filter** 1 - 2 of 2

Attribute	Description	Data Type	Mandatory?	Date Value
> ACTWOSTART	Actual Work Order Start	DATE	<input type="checkbox"/>	_____
> WONUM	Work Order #	ALN	<input type="checkbox"/>	_____

Describe the issue

- I need help from a TE
- I need parts to finish a work order
- I am starting (or taking off hold) a work order
- I am ready to close a work order

Additional details

Work Order #:

Enter response

Actual Work Order Start:

Escalations

- Perform your SR automations at a given frequency
- Escalation points are associated with the ticket template ID
- Assign Automation Scripts with Action launch points and Communications with the Escalation Point

Escalation: SLS_NEW_SR [New Service Request Notification Process](#)

* Applies To: SR

Condition: `status='NEW' and reportdate >= to_Date('01/12/2024 08:45 AM';MM/DD/YYYY HH:MI PM')`

Escalation Point: 3

Elapsed Time Attribute:

Escalation Point Condition: `templateid='1005'`

Actions Notifications

Select Action Group or add individual actions by clicking New Row. Action Group: 1009

Actions Filter 1 - 1 of 1

Action	Description	Type	Sequence
SRSTARTWO	SR automation to start a work order	CUSTOM	10

Automations

- Create as an Action or Object launch point automation script.
- Get the referenced object from your relationship

```
from psdi.server import MXServer
from psdi.mbo import MboConstants

refWOSet = mbo.getMboSet("SRSPECWO")
refWOCount = refWOSet.count()
comment = "Referenced work order does not exist."

if (refWOCount == 1):
    # Change WO status
    refWO = refWOSet.getMbo(0)
```

- Now you can affect the referenced Work Order object however you like.

Automations (cont.)

- Create a relation between the new SR and the Work Order

```
# Add related record for SR to WO
relatedRecordSet = refWO.getMboSet("RELATEDRECORD")
relatedRecord = relatedRecordSet.add()

if relatedRecord is not None:
    relatedRecord.setValue("RELATEDRECKEY",mbo.getString("TICKETID"))
    relatedRecord.setValue("RELATEDRECCLASS","SR")
    relatedRecord.setValue("RELATEDRECSITEID","SLS")
    relatedRecord.setValue("RELATEDRECORDID","SLSORG")
    relatedRecord.setValue("SITEID","SLS")
    relatedRecord.setValue("ORGID","SLSORG")
    relatedRecord.setValue("RELATETYPE","RELATED")
```

Related Tickets		Filter	>
Related Record Key			
>	1704	>	I a

Service Request: 1704		Filter	
Related Work Orders			
Work Order			De
>	49851	ⓘ	> 8M

Automations (cont.)

- Change the status of the Work Order or the SR

```
if (refWO.getString("STATUS")!="INPRG" and refWO.getInt("HISTORYFLAG")==0):  
    refWO.changeStatus("INPRG",MXServer.getMXServer().getDate(),"Changed by SR" + mbo.getString("TICKETID"),MboConstants.NOACCESSCHECK|MboConstants.NOVALIDATION)  
    comment = "Work order status changed to INPRG."  
else:  
    comment = "Work order status already in INPRG, or was closed, and was not changed."
```

Status	Status Date▼	Changed By	Memo
INPRG	2/16/24 12:18 PM	MAXADMIN	Changed by SR1704

```
# Close SR  
mbo.changeStatus("CLOSED",MXServer.getMXServer().getDate(),"Closed by automation script SRSTARTWO.",MboConstants.NOACCESSCHECK|MboConstants.NOVALIDATION)
```

Status	Changed Date▼	Changed By	Memo
CLOSED	2/16/24 12:18 PM	MAXADMIN	Closed by automation script SRSTARTWO.

Automations (cont.)

- Set the Work Order or SR owner

```
# Set SR reported by user as owner of WO
refWO.setValue("OWNER",mbo.getString("REPORTEDBY"))
comment = comment + " WO Owner set to " + mbo.getString("REPORTEDBYNAME") + "."
```

Own Date▼	Owner	Owner Group	Owner Change By
2/16/24 12:18 PM	3294027		MAXADMIN

- Setting the owner of the SR will automatically move the SR into the QUEUED status

```
# Set SR owner
mbo.setValue("OWNER","3304318")
```


Automations (cont.)

- Add comments to the Work Order and/or SR



```
#Add comment to WO
woWLRecordSet = refWO.getMboSet("WORKLOGAPPT")
woWLRecord = woWLRecordSet.add()
woWLText = "Reported by: " + mbo.getString("REPORTEDBYNAME")
woWLText = woWLText + "<br>" + mbo.getString("DESCRIPTION")
woWLText = woWLText + "<br>" + mbo.getString("DESCRIPTION_LONGDESCRIPTION")

if woWLRecord is not None:
    woWLRecord.setValue("DESCRIPTION","SR"+mbo.getString("TICKETID")+ " Comments")
    woWLRecord.setValue("DESCRIPTION_LONGDESCRIPTION",woWLText)
    woWLRecord.setValue("CLIENTVIEWABLE",1)
```



```
# Add comment to SR
srCmtSet = mbo.getMboSet("WORKLOG")
srCmt = srCmtSet.add()

if srCmt is not None:
    comment = comment + " SR Closed automatically."
    srCmt.setValue("DESCRIPTION","SR Automation Comment")
    srCmt.setValue("DESCRIPTION_LONGDESCRIPTION",comment)
    srCmt.setValue("CLIENTVIEWABLE",1)
```

Details

Record: 49851	Summary: SR1704 Co
Class: WORKORDER	Details: 
Created By: MAXADMIN	Font: <input type="text"/>
Date: 2/16/24 12:18 PM	Reported by: A
Type: CLIENTNOTE 	I am starting (
Viewable? <input checked="" type="checkbox"/>	

Details

Record: 1704	Summary: SR Automation Comment
Class: SR	Details: 
Created By: MAXADMIN	Font: <input type="text"/> Size: <input type="text"/>
Date: 2/16/24 12:18 PM	Work order status changed to INPRG. WO Owner set to
Type: CLIENTNOTE 	
Viewable? <input checked="" type="checkbox"/>	

Automations (cont.)

- Move an asset

```
#check current location of the asset to ensure it is operating  
if assetMBO.getString("LOCATION.TYPE")=="OPERATING":
```

```
assetMBO.moveAssetWithinNonInventory(mbo.getString("SRSPECMOVETOCOLUMN.ALNVALUE"), "Moved asset via SR" + mbo.getString("TICKETID"), MXServer.getMXServer().getDate(), "", "", False, False, False)  
comment = "Moved " + assetMBO.getString("DESCRIPTION") + " from " + assetOrigLocation + " to " + mbo.getString("SRSPECMOVETOCOLUMN.ALNVALUE")
```

```
moveAssetWithinInventory(java.lang.String newLocation, java.lang.String memo,  
java.util.Date dateMoved, java.lang.String newBinnum, java.lang.String ponum,  
java.lang.String glCreditAcct, java.lang.String glDebitAcct,  
java.lang.String matRecTransID)  
moveAssetWithinInventoryAcrossOrgFromHolding(java.lang.String newLocation,  
java.lang.String memo, java.util.Date dateMoved, java.lang.String newBinnum,  
java.lang.String orgid, java.lang.String glCreditAcct,  
java.lang.String glDebitAcct, java.lang.String matRecTransID)  
moveAssetWithinNonInventory(java.lang.String newLocation, java.lang.String memo,  
java.util.Date dateMoved, java.lang.String wonum, java.lang.String toParent,  
boolean checkMismatch, boolean checkOccupied, boolean updateWo)  
moveAssetWithinNonInventory(java.lang.String newLocation, java.lang.String memo,  
java.util.Date dateMoved, java.lang.String enterBy, java.lang.String wonum,  
java.lang.String toParent, boolean checkMismatch, boolean checkOccupied,  
boolean updateWo)
```


Automations (cont.)

- Additional automations we're working on
 - Asset up/down
 - Meter reading updates

Q&A