

# IBM Maximo Asset Management V7.1

## Cancel service requests during work order cancellations



This training module teaches Maximo® version 7.1 users how to cancel the original service request during a work order cancellation.

## Objectives

Upon completion of this course, you can perform these tasks:

- Create a synonym domain status called SRSTATUS
- Create an action
- Create an escalation to cancel service request work orders
- Verify that created escalations cancel the NEW status on related SRs when canceling work orders

Upon completing this training you can perform these tasks related to cancelling the NEW status on service requests related to work orders that are being cancelled: create the required synonym domain status, action, and escalation along with verify that escalations cancel the NEW status on SRs when work orders are cancelled.

## Overview

To re-create the Service Request (SR) record still in new status scenario, perform these steps:

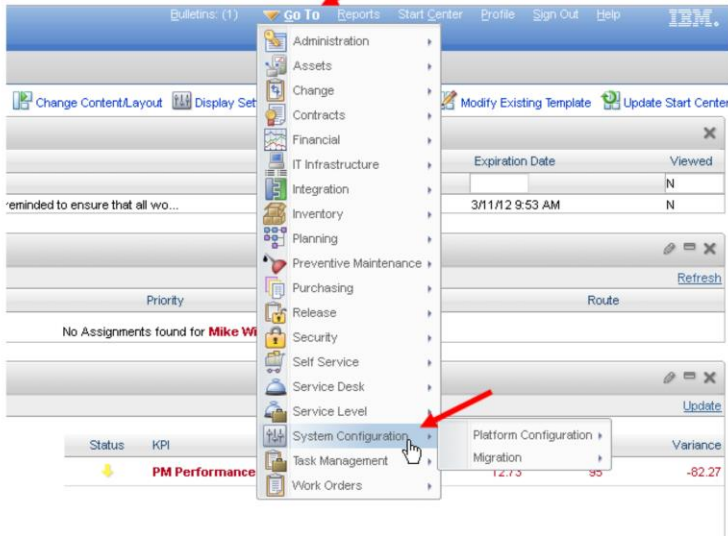
1. Create a SR with the SR application
2. Go to Select Action menu
  - a. Select Create
  - b. Select Work Order
  - c. Verify new work order created
3. Go to the Related Records tab
  - a. Click the arrow besides the work order number
  - b. Hyperlink jump to the work order tracking application
4. Click Change Status icon to cancel work order
5. Click Return to hyperlink jump back to the Service Request application
6. Observe that the Service Request record is still in NEW status

Users want like to see that a cancellation of the related work order also cancels the original service request record.

A new Maximo Service Request (SR) is created by using the SR application. A Work Order (WO) must be created for each new SR. The status of the work order is changed when a work order is cancelled.

## Navigating to system configuration application

Go to System Configuration



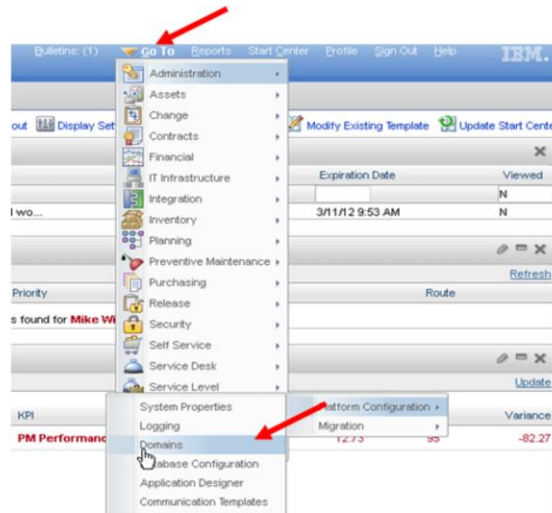
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Login to Maximo and navigate to the System Configuration menu. To do this you first click **Go To**, then scroll down to System Configuration.

## Navigating to domains application

### Select Domains



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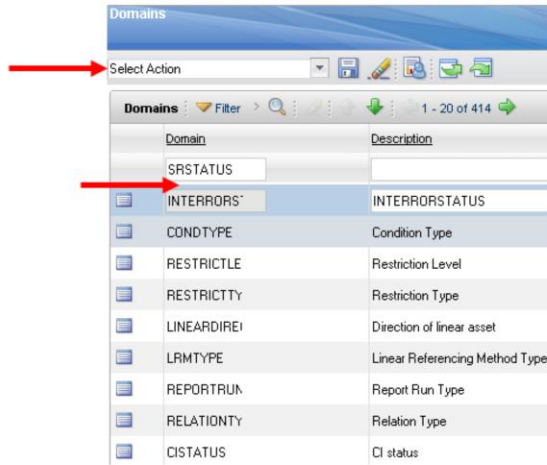
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From the Platform Configuration menu select **Domains**.

## Setting up SRSTATUS domain search

Enter a domain name



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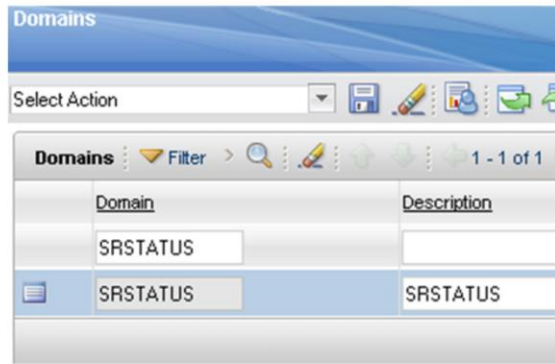
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Type **SRSTATUS** in the Domain text box. This will set up a search for SRSTATUS domains.

## Initiating search for SRSTATUS domains

Press Enter



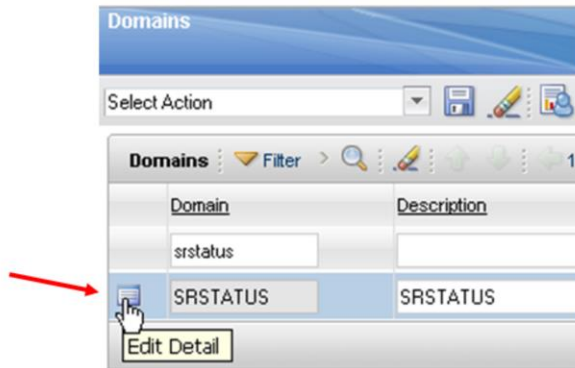
The screenshot shows the IBM Domains management interface. At the top, there is a blue header with the word "Domains". Below the header is a "Select Action" dropdown menu and a toolbar with icons for save, edit, delete, and other actions. The main area displays a table with two columns: "Domain" and "Description". The table contains one row with the value "SRSTATUS" in both columns. The row is highlighted in blue, indicating it is selected. The interface also shows a "Filter" button and a search icon.

Domain	Description
SRSTATUS	SRSTATUS

Press **Enter** on the keyboard to initiate a search for all SRSTATUS synonym domains.

## Editing SRSTATUS domain detail

Click **Edit Detail**



Click the **Edit Detail** button. This will open the configuration of the SRSTATUS domain.



## Adding new synonym domain rows

Click **New Row**

**SYNONYM Domain**

INPHUa	INPHUa	In Progress			
NEW	NEW	New	<input checked="" type="checkbox"/>		
PENDING	PENDING	Pending	<input checked="" type="checkbox"/>		
QUEUED	QUEUED	Queued	<input checked="" type="checkbox"/>		
RESOLVED	RESOLVED	Resolved	<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		

Internal Value:

Value:

Description:

Default?

Organization:

Site:

View/Modify Conditions **New Row**

Set Conditions OK Cancel

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Add a new row to the SRSTATUS domain.

## Setting synonym domain internal value and value attributes

The screenshot displays the 'SYNONYM Domain' configuration window. At the top, there is a table listing several synonym domains. The 'RESOLVED' domain is selected, and its details are shown in the main area below. The details include:

Internal Value	Value	Description	Default?	Organization	Site
RESOLVED	CAN	CAN	<input type="checkbox"/>		

Red arrows in the image point to the 'Internal Value' field (containing 'RESOLVED'), the 'Value' field (containing 'CAN'), the 'Description' field (containing 'CAN'), the 'Default?' checkbox (which is unchecked), and the 'Organization' and 'Site' fields (which are empty). The 'OK' button at the bottom right is also highlighted with a red arrow.

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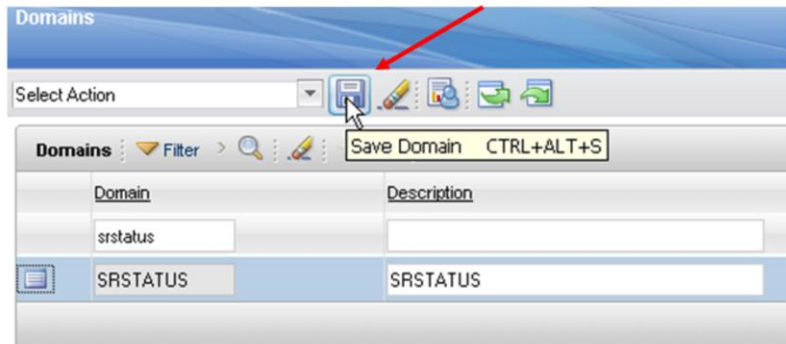
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Set **Internal Value** to *resolved*, **Value** to *CAN*, and **Description** to *CAN*. Do not check **Default** check box and do not populate the **Organization** and **Site** fields. Click **OK**.

## Saving domain changes

Click **Save Domain** icon

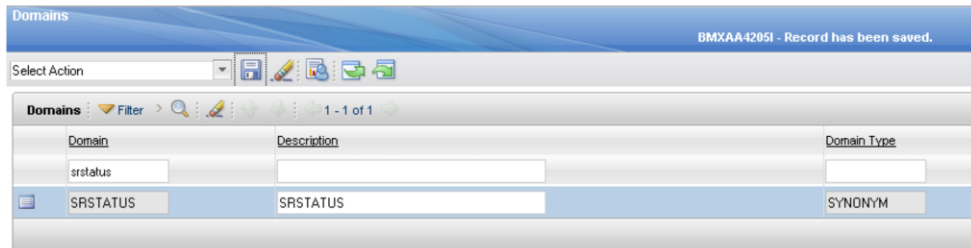


Click the **Save Domain** icon to save the changes made to the SRSTATUS domain.

## Observing domain record saved confirmation messages

Message comes up

"BMXAA4205I – Record has been saved"



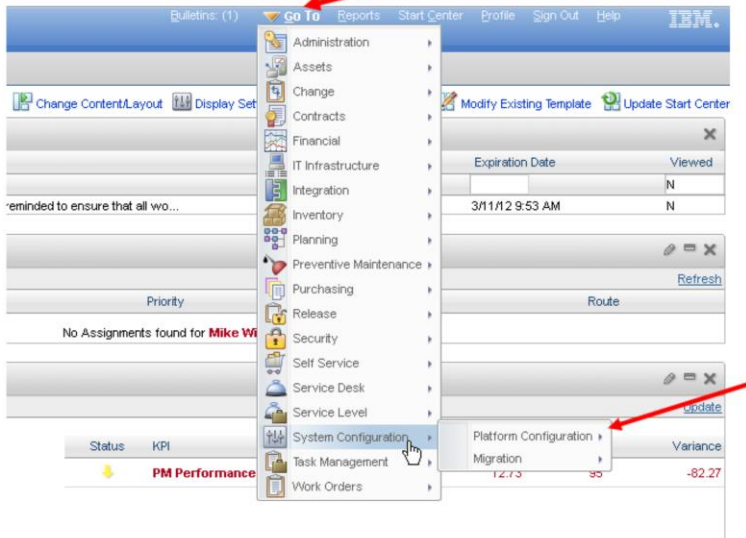
The screenshot shows the IBM Domains management interface. At the top, a blue banner displays the message "BMXAA4205I - Record has been saved." Below this is a toolbar with various icons for actions like save, edit, and delete. A table below the toolbar lists domain records. The table has three columns: Domain, Description, and Domain Type. One record is highlighted in blue, showing the domain "SRSTATUS" with the description "SRSTATUS" and the domain type "SYNONYM".

Domain	Description	Domain Type
srstatus		
SRSTATUS	SRSTATUS	SYNONYM

A message opens stating that the SRSTATUS record has been saved.

## Navigating to platform configuration

Start Center > Go to the System Configuration > Platform Configuration



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Navigate from the Start Center to the Platform Configuration menu. You must go through the System Configuration menu to reach this menu.

## Navigating to actions application

Select the **Actions** application

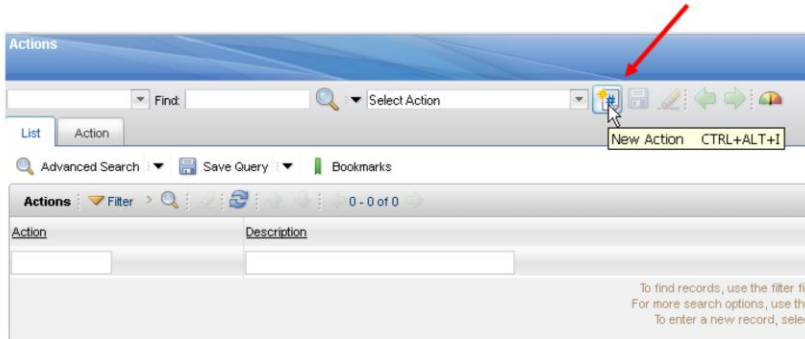
The screenshot shows the IBM ServiceNow user interface. At the top, there is a navigation bar with 'Go To' highlighted. A dropdown menu is open, listing various applications. A red arrow points to the 'Actions' option in this menu. Below the main menu, a 'Platform Configuration' sub-menu is also visible, with 'Migration' listed. At the bottom of the screen, a table displays 'PM Performance' metrics.

Status	KPI	Actual	Target	Variance
↓	PM Performance	12.73	95	-82.27

Navigate from Platform Configuration menu to the Actions application.

## Creating new action

Click **New Action** icon on the toolbar



Click the **New Action** button to initiate creating a new action.

## Setting SR cancellation action attributes

### Configure attributes for SR cancellation action

The screenshot shows the IBM Actions configuration interface. The main configuration area is titled 'Action' and contains the following fields:

- Action:** CAN\_SR
- Description:** CANCEL SR CREATED WORK ORDER
- Object:** SR
- Type:** Change Status
- Value:** CAN
- Parameter/Attribute:** (empty)
- Memo:** (empty)
- Accessible From:** ALL

Below the configuration area is a 'Members' table with the following columns: Action, Description, Object, Type, Value, and Sequence. The table currently displays no rows.

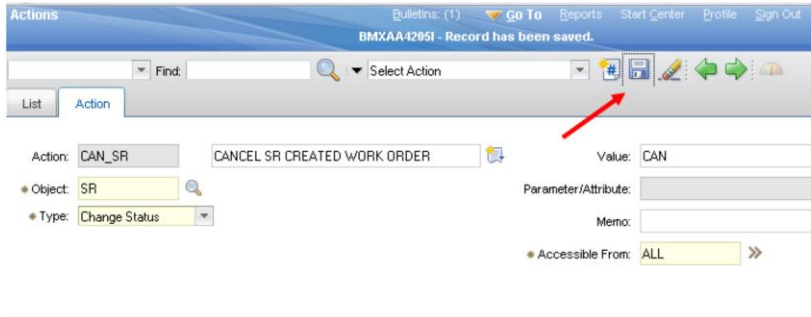
Red arrows point to the Action, Object, Type, and Value fields in the configuration area.

Set **Action** to *CAN\_SR*, **Object** to *SR*, **Type** to *Change Status*, and the **Value** to *CAN*.



## Saving SR cancellation action record

Click the **Save Record** icon



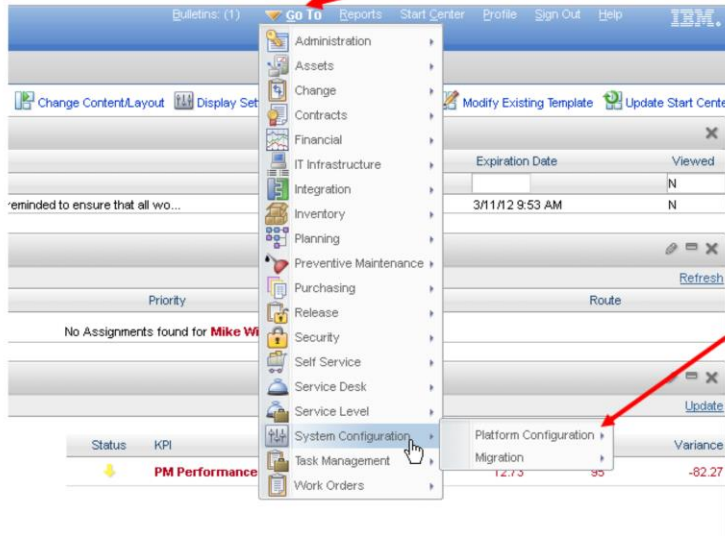
The screenshot shows the IBM Actions interface. At the top, there is a navigation bar with "Bulletins: (1)", "Go To", "Reports", "Start Center", "Profile", and "Sign Out". Below this, a blue banner displays "BMXAA42051 - Record has been saved." A toolbar contains a search icon, a "Select Action" dropdown, and several icons including a floppy disk (Save Record), a pencil, and arrows. A red arrow points to the floppy disk icon. Below the toolbar, there are two tabs: "List" and "Action". The "Action" tab is active, showing a form with the following fields:

- Action: CAN\_SR
- Value: CAN
- Object: SR
- Parameter/Attribute: (empty)
- Type: Change Status
- Memo: (empty)
- Accessible From: ALL

Click the **Save** record icon to save the record.

## Navigating to Platform Configuration

Start Center > Go to the System Configuration > Platform Configuration



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You begin the creation of an escalation by navigating to the Platform Configuration applications. From the Maximo Start Center click **Go To**. Navigate down the Go To menu to the System Configuration menu. Next click **Platform Configuration**.

## Selecting Escalations application

### Select Escalations

The screenshot shows the IBM Service Request Manager interface. The 'Go To' menu is open, and the 'Escalations' option is highlighted. A red arrow points to the 'Escalations' option. Another red arrow points to the 'Go To' menu icon. The interface includes a top navigation bar with 'Go To', 'Exports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. The main content area displays a list of applications and a table of performance metrics.

Actual	Target	Variance
12.73	95	-82.27

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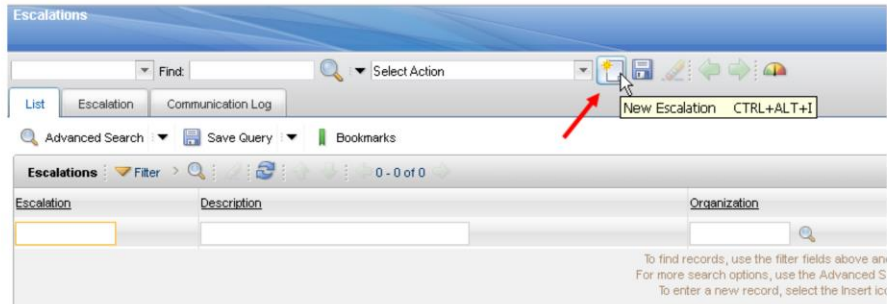
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Select the **Escalations** application.

## Creating new escalation

Click New Escalation icon on the toolbar



Click the **New Escalation** icon on the toolbar. This will start the creation of a new escalation.

## Configuring CAN\_SR escalation attributes

### Configure the escalation

The screenshot shows the 'Escalations' configuration window. The 'Escalation' tab is selected. The configuration details are as follows:

- Escalation:** CAN\_SR
- Applies To:** SR
- Condition:** exists (select 1 from workorder where origrecordclass LIKE '%SR%' and origrecordid=SR.TICKETID AND STATUS='CAN')
- Site:** [Empty field]
- Organization:** [Empty field]
- Create Successful Execution Entry?:**
- Last Run Time:** [Empty field]

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Set the **Escalation** to *CAN-SR*, **Applies To** to *SR*, **Condition** to *exists (select 1 from workorder where origrecordclass LIKE '%SR%' and origrecordid=SR.TICKETID AND STATUS='CAN')*.

## Setting CAN\_SR escalation schedule


Click **Set Schedule** icon

Active?

\* Schedule: 1m,xxxxxxxxx  **Set Schedule**

Calendar Organization:  >>

Calendar:  >>

Shift:  

Now click the **Set Schedule** icon. It is located to the far right.

## Creating escalation (1 of 12)

Enter 1 in the Every minute(s) field

**Set Schedule**

Select a date interval and then Preview to see the dates.

Every  second(s)

Every  minute(s)

Every  hour(s), on minute

Every  day(s), at time

Every  week(s), on day  at time

Every  month(s),

on day  at time

on the   of the month, at time

Every  year(s),

on  on day  at time

on the   of the year, at time

Date Preview

10/29/11 12:40 PM  
10/29/11 12:41 PM  
10/29/11 12:42 PM  
10/29/11 12:43 PM  
10/29/11 12:44 PM  
10/29/11 12:45 PM  
10/29/11 12:46 PM  
10/29/11 12:47 PM  
10/29/11 12:48 PM  
10/29/11 12:49 PM  
10/29/11 12:50 PM  
10/29/11 12:51 PM  
10/29/11 12:52 PM  
10/29/11 12:53 PM  
10/29/11 12:54 PM  
10/29/11 12:55 PM  
10/29/11 12:56 PM  
10/29/11 12:57 PM  
10/29/11 12:58 PM  
10/29/11 12:59 PM

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Enter 1 in the **Every minute(s)** field for a one minute interval, then click **OK**.

## Creating escalation (2 of 12)

Click **New Row** button

The screenshot shows the 'Escalation Points' section of the IBM interface. It features a table with the following columns: Escalation Point, Elapsed Time Attribute, Elapsed Time Interval, Interval Unit of Measure, Organization, Calendar, and Shift. The table currently displays no rows. A red arrow points to the 'New Row' button located at the bottom right of the table. Below the table, there is an 'Actions' section with a 'New Row' button. The bottom table has columns: Action, Description, Type, and Sequence. The bottom table also displays no rows.

Go to the Escalation Points section and click the **New Row** button.



## Creating escalation (3 of 12)

## Set Elapsed Time Attribute, Elapsed Time Interval, and Interval Unit of Measure

Validation Results

Escalation Points Filter 1 - 1 of 1

Escalation Point	Elapsed Time Attribute	Elapsed Time Interval	Interval Unit of Measure	Organization	Calendar
1	CHANGEDATE	1.00	MINUTES		

Details

Escalation Point: 1

Elapsed Time Attribute: CHANGEDATE

Elapsed Time Interval: 1.00

Interval Unit of Measure: MINUTES

Repeat?

Organization:

Calendar:

Shift:

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Set the Elapsed Time Attribute to **CHANGEDATE**, the Elapsed Time Interval to **1.00**, and the Interval Unit of Measure to **MINUTES**.

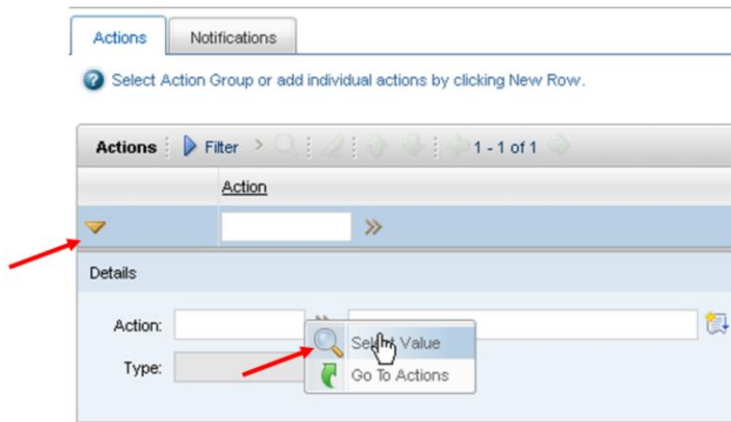
## Creating escalation (4 of 12)

Click **New Row**

The screenshot shows the 'Actions' section of a software interface. At the top, there are tabs for 'Actions' and 'Notifications'. Below the tabs, there is a message: 'Select Action Group or add individual actions by clicking New Row.' To the right of this message is an 'Action Group' dropdown menu. Below this is a table with columns for 'Action', 'Description', 'Type', and 'Sequence'. The table is currently empty, with the text 'No rows to display...' centered in the body. In the bottom right corner of the table area, there is a 'New Row' button. A red arrow points to this button.

Click the **New Row** button in the Actions section. It is located in the far bottom right corner.

## Creating escalation (5 of 12)



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Click the arrow beside the Action field, then click **Select Value**.

## Creating escalation (6 of 12)

**Select Value**

Actions: Filter > 1 - 13 of 13 Download

Action	Description	Object
<b>CAN_SR</b>	<b>CANCEL SR CREATED WORK ORDER</b>	<b>SR</b>
SR CREATECAN_SR	Create Change Action	SR
SR CREATEWO	Create Work Order	SR
SITEBEDFORD	Set site to Bedford	SR
SR GIVE2TIER1	Delegate SR to Tier 1	SR
SR APPLYSLA	Apply SLA to SR	SR
SR CREATEINCIDENT	Create Incident Action	SR
SR CREATEPROBLEM	Create Problem Action	SR
SR QUEUED	SR Queued Action	SR
SR INPROG	SR Inprog Action	SR
SR PENDING	SR Pending Action	SR
SR RESOLVED	SR Resolved Action	SR
SR CLOSED	SR Closed Action	SR

Cancel

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Select **CAN\_SR**. Remember that you earlier created **CAN\_SR**.

## Creating escalation (7 of 12)

Actions Notifications

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

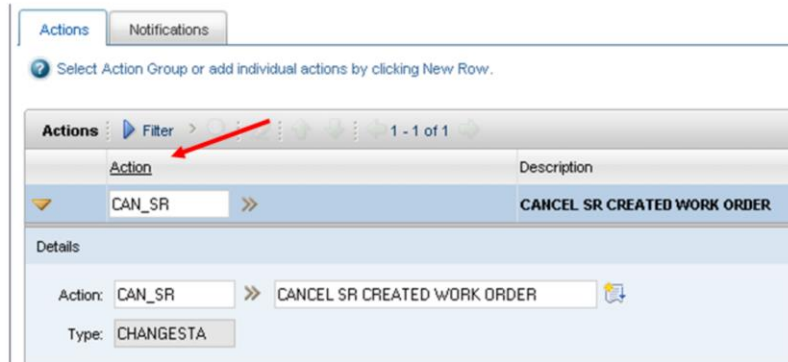
Actions : Filter > 1 - 1 of 1

Action	Description
CAN_SR >>	CANCEL SR CREATED WORK ORDER

Details

Action: CAN\_SR >> CANCEL SR CREATED WORK ORDER

Type: CHANGESTA



The CAN\_SR action gets populated in the Action field.

## Creating escalation (8 of 12)

Escalations

Find: [ ] Select Action [ ]

List Escalation Communication Log

Save Escalation CTRL+ALT+S

Escalation: CAN\_SR [ ]

Applies To: SR [ ]

Condition: exists (select 1 from workorder where origrecordclass LIKE '%SR%' and origrecordid=SR.TICKETID AND STATUS='CAN')

Site: [ ]

Organization: [ ]

Create Successful Execution Entry?

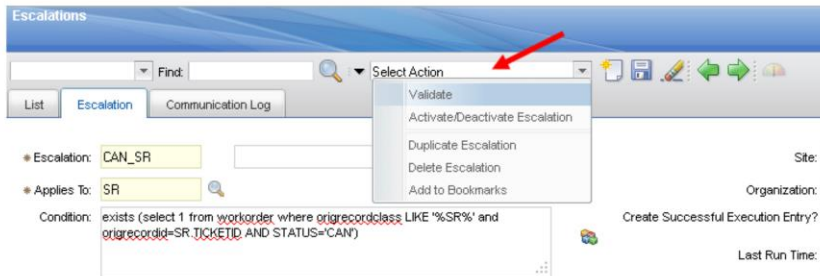
Last Run Time: [ ]

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Click the **Save Escalation** icon to save the CAN\_SR escalation.

## Creating escalation (9 of 12)

Go to the Select Action menu, select **Validate**



Go to the Select Action menu and select **Validate**.

## Creating escalation (10 of 12)

Message comes up: “  
**BMXAA1151I - Validation successful**”



A message pops up stating that the validation action was successful.



## Creating escalation (11 of 12)

## Activate/Deactivate Escalation

Escalations

Find: [Search Icon]

Select Action

- Validate
- Activate/Deactivate Escalation
- Duplicate Escalation
- Delete Escalation
- Add to Bookmarks

Escalation: CAN\_SR

Applies To: SR

Condition: exists (select 1 from workorder where origrecordclass LIKE '%SR%' and origrecordid=SR.TICKETID AND STATUS='CAN')

Site:

Organization:

Create Successful Execution Entry?

Last Run Time:

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Go to the Select action menu, then select **Activate/Deactivate Escalation**.

## Creating escalation (12 of 12)

Message comes up: "BMXAA1145E – Escalation CAN\_SR has been activated"

The screenshot shows the IBM Workorder Manager interface for creating an escalation. At the top, a blue banner displays the message: "BMXAA1145E - Escalation CAN\_SR has been activated." A red arrow points to this message. Below the banner is a navigation bar with tabs for "List", "Escalation", and "Communication Log". The main content area shows the configuration for the "CAN\_SR" escalation. It includes fields for "Escalation" (CAN\_SR), "Applies To" (SR), "Condition" (exists (select 1 from workorder where origrecordclass LIKE '%SR%' and origrecordid=SR.TICKETID AND STATUS='CAN')), "Site", "Organization", "Create Successful Execution Entry?" (checkbox), and "Last Run Time".

A message pops up stating that the CAN\_SR escalation has been activated.

## Confirming SR status change

1. Go to the Service Requests application.  
Click **New** icon on the toolbar to create a SR

Service Requests

Find:  Select Action

List Service Request Related Records Log Specifications

\* Service Request: 1176 Owner:

**User Information**

Reported By:  »

Name:  »

Phone:

E-mail:

Create a new SR. This record is used to confirm that the SR status is no longer listed as NEW.

## Enter details to test status change

Enter some test info about this SR

**Service Request Details**

Summary: test escalation

Font: Size: Format: None

Details:

Asset: 11450 >> Centrifugal Pump 100GPM/60FTHD

Location: BR450 >> Feed Water Pump- Centrifugal/100GPM/60FT

Configuration Item: >>

Target Description:

GL Account: 6210-339-??? 🔍

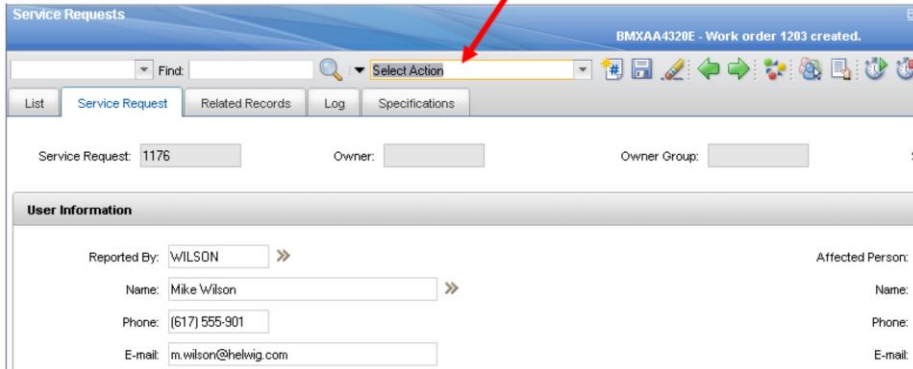
Asset Site: BEDFORD 🔍

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Enter some test info about the service request such as. summary, asset, location, GL, and asset site.

## Create a work order

### 2. Create a work order

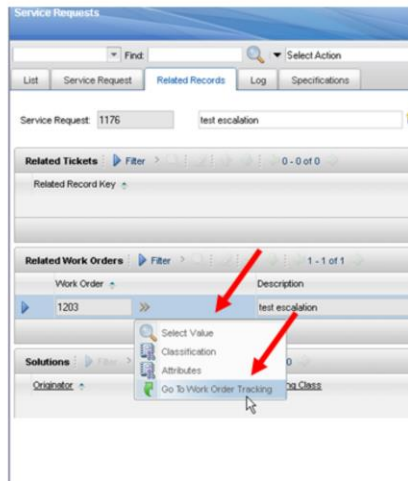


The screenshot displays the IBM Service Requests web interface. At the top, a blue banner reads "Service Requests" and "BMXAA4320E - Work order 1203 created." Below this is a navigation bar with a "Find:" search field, a "Select Action" dropdown menu (highlighted with a red arrow), and several icons. Below the navigation bar are tabs for "List", "Service Request", "Related Records", "Log", and "Specifications". The main content area shows a form with fields for "Service Request: 1176", "Owner:", and "Owner Group:". Below this is a "User Information" section with two columns of fields: "Reported By:" (WILSON), "Name:" (Mike Wilson), "Phone:" ((617) 555-901), and "E-mail:" (m.wilson@helwig.com) on the left; and "Affected Person:", "Name:", "Phone:", and "E-mail:" on the right. At the bottom left is the page number "37", the text "Cancel service requests during work order cancellations", and at the bottom right is the copyright notice "© 2012 IBM Corporation".

Go to the Select Actions menu and select to **create a workorder**.

## Open work order tracking application

### 3. Go to Work Order Tracking



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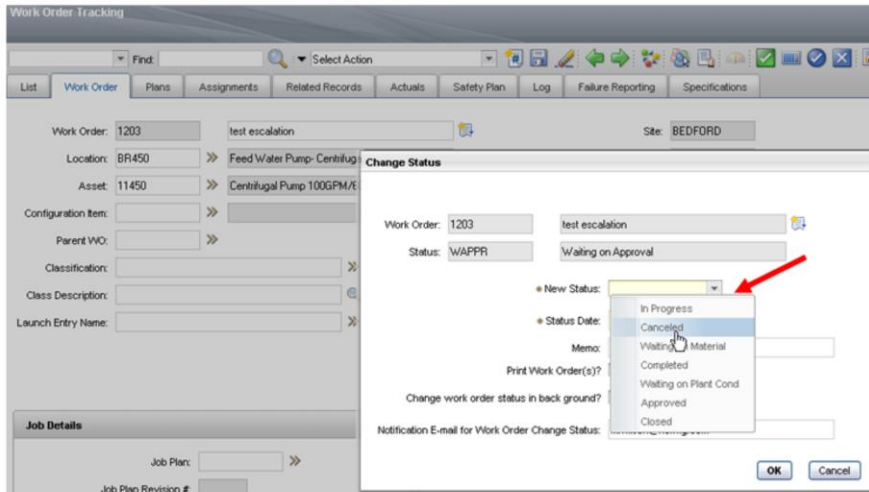
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Go to the **related records** tab. Click the arrow beside the work order field. Upon completion of these steps select Go to Work Order Tracking.

## Select canceled as new status

Select **CANCELED** as the New Status



Click the Change Status icon, then select **CANCELED** as the New Status

## Service request-created work order canceled

Service request-created work order canceled

The screenshot displays the IBM Work Order Tracking interface. At the top, a message reads "Service request-created work order canceled". Below this, the "Work Order Tracking" header shows a status message: "BMXAA4591E - Status change(s) completed successfully." The interface includes a navigation menu with tabs for "List", "Work Order", "Plans", "Assignments", "Related Records", "Actuals", "Safety Plan", "Log", "Failure Reporting", and "Specifications". The main content area is divided into several sections: "Work Order" (1203), "Location" (BR450), "Asset" (11450), "Configuration Item", "Parent WO", "Classification", "Class Description", and "Launch Entry Name". The "Work Order" section shows "test escalation" and "Site: BEDFORD". The "Location" section shows "Feed Water Pump-Centrifugal/100GPM/60FT". The "Asset" section shows "Centrifugal Pump 100GPM/60FTHD". The "Work Order" section also shows "Class: WORKORDEI", "Work Type", "GL Account: 6210-339-777", "Failure Class: PUMPS", "Problem Code", "Storeroom Material Status", "Direct Issue Material Status", "Work Package Material Status", and "Material Status Last Updated". The "Attachments" section shows a status of "CAN" and a date of "10/29/11 1:09 PM". A red arrow points to the "Attachments" icon. The bottom of the interface shows the page number "40", the text "Cancel service requests during work order cancellations", and the copyright notice "© 2012 IBM Corporation".

Observe that the service request-created work order has been canceled.



## Return to the service request application screen

Hyperlink back to the SR application screen

Work Order Tracking

Find: [ ] Select Action: [ ]

IBM  
Return ALT+R

List Work Order Plans Assignments Related Records Actuals Safety Plan Log Failure Reporting Specifications

Work Order: 1203 test escalation Site: BEDFORD Attachments  
Location: BR450 >> Feed Water Pump- Centrifugal/100GPM/60F1 Class: WORKORDEI Status: CAN  
Asset: 11450 >> Centrifugal Pump 100GPM/60FTHD Work Type: OL Account: 6210-339-??? Status Date: 10/29/11 1:09 PM  
Configuration Item: Parent W/O: Failure Class: PUMPS >> Inherit Status Changes? [x]  
Classification: >> Problem Code: Accepts Charges? [x]  
Is Task? [ ]

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Click the Return icon to hyperlink back to the service request application screen.

## Testing service request cancellation settings

- Enter 1176 in the Search field beside the Magnifying Glass icon
- Press Enter to acquire the record again

The screenshot displays the IBM Service Requests web interface. At the top, there is a search bar with the text "Find: 1176" and a magnifying glass icon. A red arrow points to the search input field. Below the search bar are navigation tabs: "List", "Service Request", "Related Records", "Log", and "Specifications". The "Service Request" tab is active. Below the tabs, there are input fields for "Service Request: 1176", "Owner:", and "Owner C". A section titled "User Information" contains the following details:

- Reported By: WILSON
- Name: Mike Wilson
- Phone: (617) 555-901
- E-mail: m.wilson@helwig.com

The service request is canceled either after a 1 minute interval or after the escalation is run (according to schedule).

## Observing service request status that is changed to canceled

Service Request status changed to **CAN**

The screenshot displays the IBM Service Requests web interface. At the top, the IBM logo is visible. Below it, the page title is "Observing service request status that is changed to canceled". A message states "Service Request status changed to **CAN**". The main interface shows a search bar with "1176" entered and a "Select Action" dropdown. Below the search bar are tabs for "List", "Service Request", "Related Records", "Log", and "Specifications". The "Service Request" tab is active, showing details for Service Request 1176. The "Status" field is highlighted with a red arrow and contains the value "CAN". Below this is the "User Information" section, which is split into two columns. The left column shows "Reported By: WILSON" and "Name: Mike Wilson". The right column shows "Affected Person: WILSON" and "Name: Mike Wilson". Both columns also display "Phone: (617) 555-901" and "E-mail: m.wilson@helwig.com". At the bottom of the page, there is a footer with the number "43", the text "Cancel service requests during work order cancellations", and the copyright notice "© 2012 IBM Corporation".

Service Request: 1176      Owner:      Owner Group:      Status: **CAN**

**User Information**

Reported By: WILSON »	Affected Person: WILSON »
Name: Mike Wilson »	Name: Mike Wilson
Phone: (617) 555-901	Phone: (617) 555-901
E-mail: m.wilson@helwig.com	E-mail: m.wilson@helwig.com

43      Cancel service requests during work order cancellations      © 2012 IBM Corporation

Observe that the service request status has been changed to CAN.

This service request has been cancelled 1 minute after the escalation was run (according to schedule).

## Summary

- Now that you have completed this course, you can perform these tasks:
  - Create a synonym domain status called SRSTATUS
  - Create an action that is related to canceling NEW status on Service Request (SR) linked to work orders
  - Create an escalation to cancel NEW status on related SRs when work orders are canceled
  - Verify that created escalations cancel the NEW status on related SRs when canceling work orders

Now that you completed this training you can perform these tasks related to cancelling service request work orders: create the required synonym domain status, action, and escalation. You can also verify that escalations cancel SRs when work orders are cancelled.

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